

Inform Gloucestershire

Gloucestershire household projections (2022-2047)¹

An overview

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¹ All data in this report is sourced from the Office for National Statistics Household Projections, [Household projections for England - Office for National Statistics](#)

Gloucestershire Household Projections, 2022-2047

Gloucestershire and district analysis, 2022-2047

Overview of projected household growth and structural change across Gloucestershire and its districts, 2022–2047.

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Executive Summary

The latest Office for National Statistics (ONS) 2022-based household projections indicate that the total number of households in Gloucestershire is expected to rise from 281,768 in 2022 to 361,837 in 2047, an increase of 80,069 households (28.4%) over the 25-year period. This increase is higher than that projected for England (22.8%) and the South West region (26.5%).

Household growth varies across each of Gloucestershire's six districts. Tewkesbury is expected to see the highest projected percentage increase, rising by 40.3% from 2022 to 2047. Cotswold and Stroud are also expected to see high levels of growth at 32.8% and 32.1% respectively. The Forest of Dean, Gloucester, and Cheltenham are expected to see more moderate increases of 24.1%, 22.2%, and 21.5% between 2022-2047.

In 2022, Gloucester had the largest number of households (55,439), representing 19.7% of Gloucestershire's total, Stroud had the second largest number of households with 53,212 (18.9%). By 2047, Stroud is projected to become the largest district in terms of household numbers, with approximately 70,281 households (19.4% of the county total), overtaking Gloucester with around 67,739 households (18.7%).

The age of Household Reference Persons (HRPs) in Gloucestershire is projected to change notably between 2022 and 2047. Households with HRPs aged 75–84 are expected to increase from 35,186 in 2022 to 55,723 in 2047, a rise of 20,537 households, equivalent to a 58.4% increase. This increase is higher than the 51.9% projected for England for the same age group. Households with HRPs aged 85 and over are expected to increase from 14,916 to 33,542, a rise of 18,626 households, or a 124.9% increase over the projection period, this is also higher than the 106.5% projected for England for this age group. Households with older HRPs are expected to see greater growth than households with younger HRPs, reflecting the county's ageing population

This pattern is mirrored across the districts, with all areas expected to see their fastest growth in households with an HRP aged 75 and over, particularly in Cotswold and Tewkesbury.

Average household size in Gloucestershire is projected to decrease from 2.28 persons per household in 2022 to 2.09 in 2047, a reduction of 0.19. This is in line with England, which is expected to see falls by 0.19 over the same period (from 2.38 to 2.19). It is worth noting throughout the period 2022-2047, household size in Gloucestershire remains slightly below the national average. All districts are expected to see decreases in household size, with Gloucester projected to see the largest decrease (2.38 to 2.14, -0.24), while other districts see decreases between 0.17 and 0.20 persons per household.

Household growth in Gloucestershire is projected to be concentrated in smaller and adult-only households. One person households are expected to increase by 44,966 (51.8%) and other households with two or more adults by 49,619 (40.6%), while households with

dependent children are expected to decrease by 14,517 (-19.9%). This shift is more pronounced than nationally, with larger increases in one person households than England overall. Tewkesbury is projected to see the fastest growth in one person households (64.5%), while Cheltenham and Gloucester are projected to see the largest percentage decrease in households with dependent children.

These trends underline the need for sustained housing delivery, a greater proportion of smaller and accessible homes, and forward planning for age-related service demand.

Key takeaways:

- Housing demand is expected to continue to grow through to 2047, with household growth in Gloucestershire (28.4%) exceeding both the South West (26.5%) and England (22.8%). This will require sustained housing delivery across the county, particularly in high-growth districts such as Tewkesbury, Stroud and Cotswold.
- Growth is expected to be increasingly driven by smaller and older households. The projected increase of 44,966 one person households and the substantial growth in households aged 75 and over indicate rising demand for smaller dwellings, accessible housing, and accommodation suitable for independent living in later life.
- Population ageing will have service implications. Large increases in households with an HRP aged 75–84 (58.4%) and 85+ (124.9%) are likely to increase demand for adult social care, health services, and community-based support.
- Family households are expected to decline in relative and absolute terms. The projected reduction of 14,517 households with dependent children (-19.9%) may affect future demand for school places in some areas, although high-growth districts may still require new provision depending on the spatial distribution of development.
- Average household size continues to fall, from 2.28 to 2.09 persons per household. This reinforces the need for a broader housing mix, as more dwellings will be required to accommodate population change even where population growth is more modest.

Introduction

What are household projections

Household projections provide estimates of the number of households that could form in the future if the trends observed in the years prior to the projection base year continue. These figures do not incorporate assumptions about future policy, investment, development constraints, or behavioural change. Instead, projections use current demographic structures, household representative rates (HRRs), and population projections to estimate household numbers in subsequent years.

The ONS projections used in this report contain data from mid-2022 to mid-2047, allowing the identification of changes in total households, household composition, and age-specific household trends across that period.

About the ONS 2022-based series

The 2022-based projections released by ONS in October 2025 are the first household projection series to fully incorporate the results of Census 2021. The integration of the Census results updates baseline counts of households, age structures, communal establishment populations, and the distribution of age-specific household representative rates. This updated data feed into the calculation of projected household numbers for each district and higher geographies across England.

The projection model calculates households using a two-stage process:

1. Projecting the future population by age and sex at local authority level.
2. Applying household representative rates to each age-sex group to estimate the number of households likely to form.

These projections do not quantify the factors influencing demographic change; they simply represent the numerical outputs derived from current demographic patterns.

Purpose and scope of this report

This report summarises future household patterns for Gloucestershire and its six districts: Cheltenham, Cotswold, Forest of Dean, Gloucester, Stroud, and Tewkesbury. Comparisons with regional and national trends have also been made, where the data is available.

The report focuses on the numerical outputs of these datasets, with each section outlining changes in total household numbers, shifts in household composition, changes in the age of household reference persons, and differences between districts.

Total household growth

The following section looks at the projected changes in the total number of households between 2022 and 2047, summarising overall growth at county level with regional and national comparisons. It also explores how the projected growth is distributed across Gloucestershire's districts.

County level trends

The total number of households in Gloucestershire is projected to increase from 281,768 in 2022 to 316,411 by 2032, which is an increase of 34,643 households or 12.3% in the ten-year period. During the same time, the South West is projected to see an 11.9% increase and England a 10.3% increase. This shows that Gloucestershire is projected to see a larger increase compared to the regional and national average.

Projections suggest that by 2047 there will be 361,837 household in Gloucestershire, an increase of 80,069 households (28.4%) from 2022. This equates to an average increase of around 3,203 households per year over the 25-year period. Gloucestershire's projected growth rate is higher than that projected for both England (22.8%) and the South West (26.5%) over the same period.

Comparing Gloucestershire's growth with all 153 County and Unitary Authorities in England, Gloucestershire is placed in the top 20% of areas for projected total household growth over the first decade (2022-2032) and the full 25-year period to 2047. Gloucestershire is ranked 29th for projected growth between 2022 and 2032, and 22nd over the period 2022 to 2047.

Figure 1 shows the projected number of households in Gloucestershire in five year intervals from 2022 to 2047. Growth is projected to be slightly stronger in the first decade, averaging around 3,464 additional households per year between 2022 and 2032, before slowing slightly over the remainder of the period. A similar pattern is seen at both regional and national level, although the scale of growth reflects the larger populations of both the South West and England.

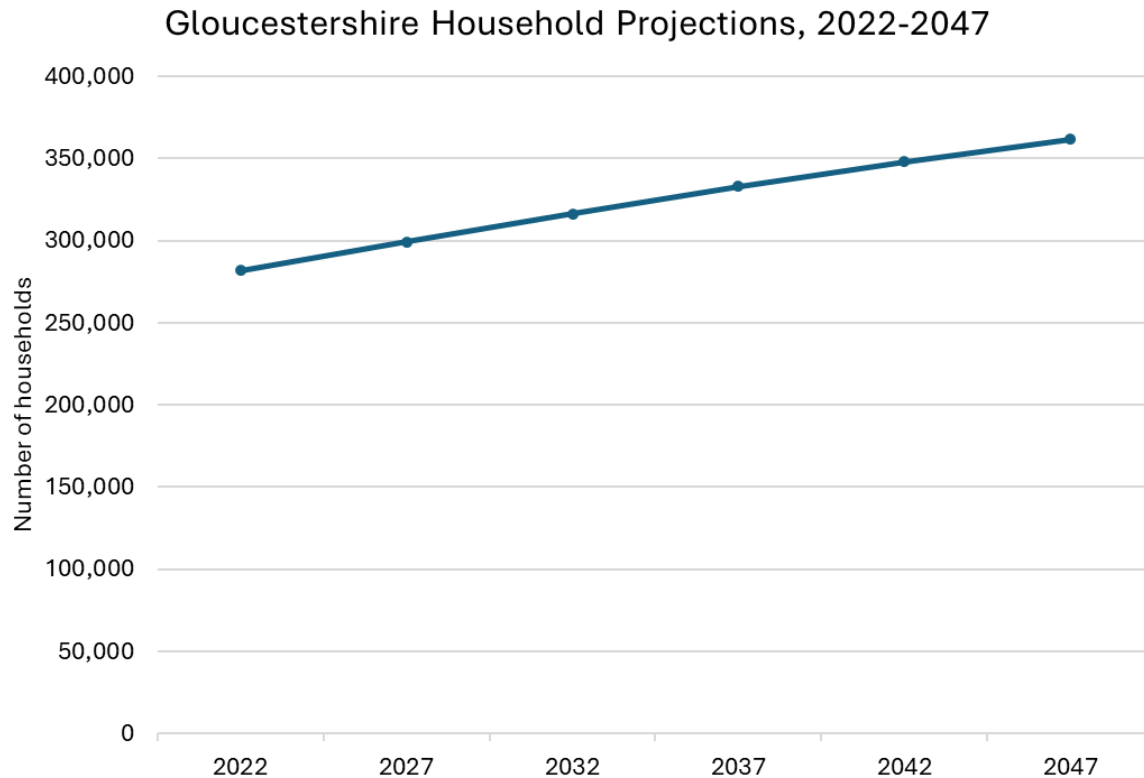


Figure 1: Gloucestershire Household Projections, 2022-2047

Variation between districts

Figure 2 shows the projected growth in household numbers across Gloucestershire’s six districts between 2022 and 2047. All districts are expected to see steady increases over the period. In 2022 the largest number of households are in Gloucester, with around 55,439 households, representing 19.7% of Gloucestershire’s total. By 2047, Stroud is projected to become the largest district in terms of households, with approximately 70,281 households (19.4% of the county total), overtaking Gloucester at around 67,739 households (18.7%).

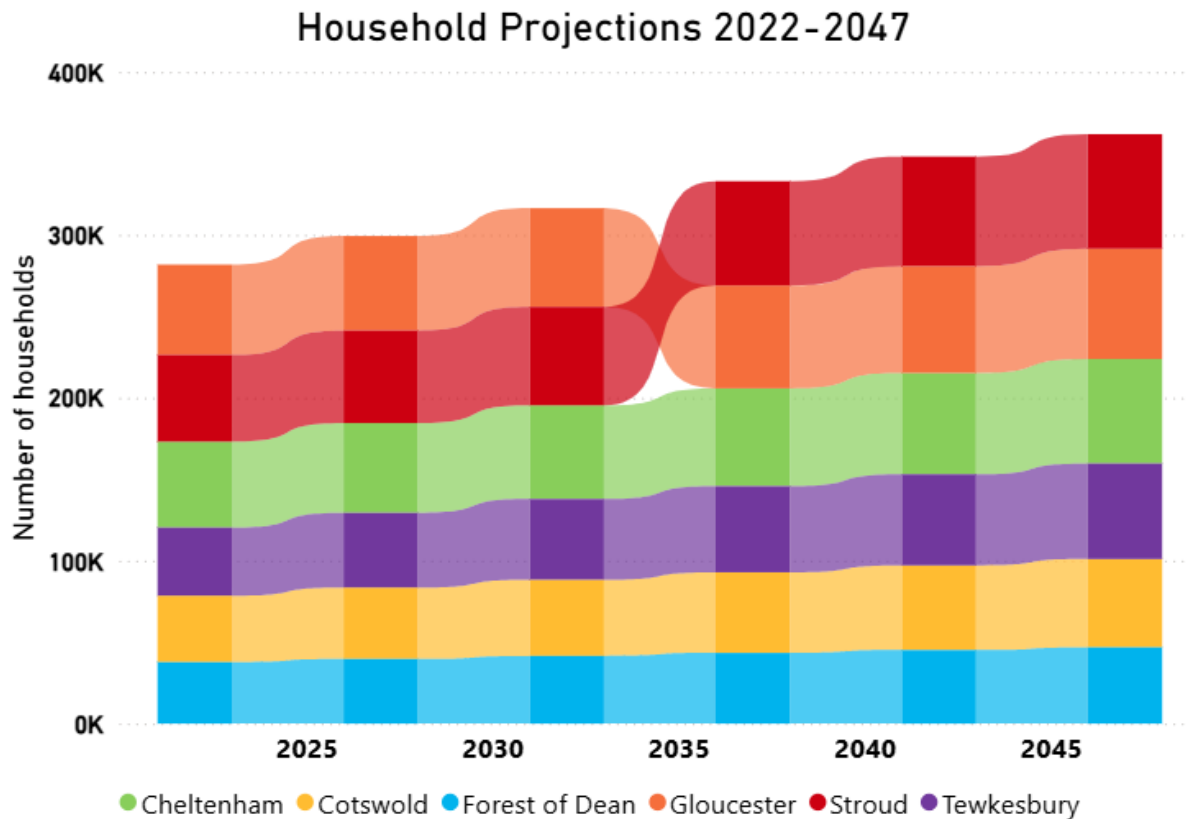


Figure 2: Household Projections 2022-2047

Tewkesbury is projected to see the largest percentage change in households in Gloucestershire. Between 2022 and 2032, the number of households is expected to increase from 41,770 to 49,491, an increase of around 18.5% (7,721 households). Over the longer 25-year period to 2047, household numbers are projected to reach approximately 58,616, representing a 40.3% increase overall (16,846 households). In absolute terms, however, Stroud is expected to see the largest numerical increase over the period to 2047, rising by 17,069 households.

In contrast, Cheltenham is expected to see the lowest percentage change. Household numbers are projected to increase from 52,786 in 2022 to 57,536 by 2032, an increase of 9.0% (around 4,750 households). By 2047, household numbers are projected to be approximately 64,159, representing a total increase of 21.5% over the 25-year period (around 11,373 households).

Looking at how Gloucestershire's six districts are positioned nationally in terms of household growth, there is considerable variation. Tewkesbury, Cotswold and Stroud all fall within the top 20% of the 296 District and Unitary Authorities in England for projected growth over both the 2022-2032 and 2022-2047 periods. Tewkesbury in particular ranks 9th nationally over the shorter 10-year time period and 10th over the longer term 25-year period, placing it within the top 10% of all authorities in both cases.

The Forest of Dean, Gloucester and Cheltenham fall within the middle 20% of District and Unitary Authorities nationally for projected household growth over both periods, indicating growth rates that are closer to the national average.

Figure 3 shows the change in the number of projected households for each Gloucestershire district, alongside county, regional and national rates for comparison.

	Number of Households by year			2022 - 2032		2022 - 2047	
	2022	2032	2047	Net Change	% Change	Net Change	% Change
Cheltenham	52,786	57,536	64,159	4,750	9.0%	11,373	21.5%
Cotswold	40,873	46,833	54,262	5,960	14.6%	13,389	32.8%
Forest of Dean	37,687	41,534	46,780	3,847	10.2%	9,093	24.1%
Gloucester	55,439	60,589	67,739	5,150	9.3%	12,300	22.2%
Stroud	53,212	60,430	70,281	7,218	13.6%	17,069	32.1%
Tewkesbury	41,770	49,491	58,616	7,721	18.5%	16,846	40.3%
Gloucestershire	281,768	316,411	361,837	34,643	12.3%	80,069	28.4%
South West	2,466,775	2,759,814	3,120,272	293,039	11.9%	653,497	26.5%
England	23,540,824	25,958,408	28,899,324	2,417,584	10.3%	5,358,500	22.8%

Figure 3: Change in the number of projected households for each Gloucestershire district with county, regional and national rates

Share of households by district

Figure 4 shows the distribution of households across Gloucestershire's districts and how this is projected to change between 2022 and 2047. In 2022 Gloucester accounts for the largest share of households in the county, representing around 19.7% of the total. Stroud and Cheltenham follow closely, accounting for 18.9% and 18.7% respectively. Cotswold and the Forest of Dean represent smaller proportions, at around 14.5% and 13.4%, while Tewkesbury accounts for approximately 14.8% of households.

By 2047, the distribution of households is projected to shift. Stroud is expected to become the largest district by share, increasing to around 19.4% of households. Gloucester's share remains broadly stable at approximately 18.7%, while Cheltenham's share is projected to decline slightly to around 17.7%, despite continued growth in household numbers.

Tewkesbury's share of households is projected to increase from around 14.8% in 2022 to approximately 16.2% by 2047. In contrast, Cotswold is expected to see a small increase in

its share (to around 15.0%), while the Forest of Dean’s share is projected to decline slightly to approximately 12.9%.

Percentage share of Households by district, 2022 and 2047

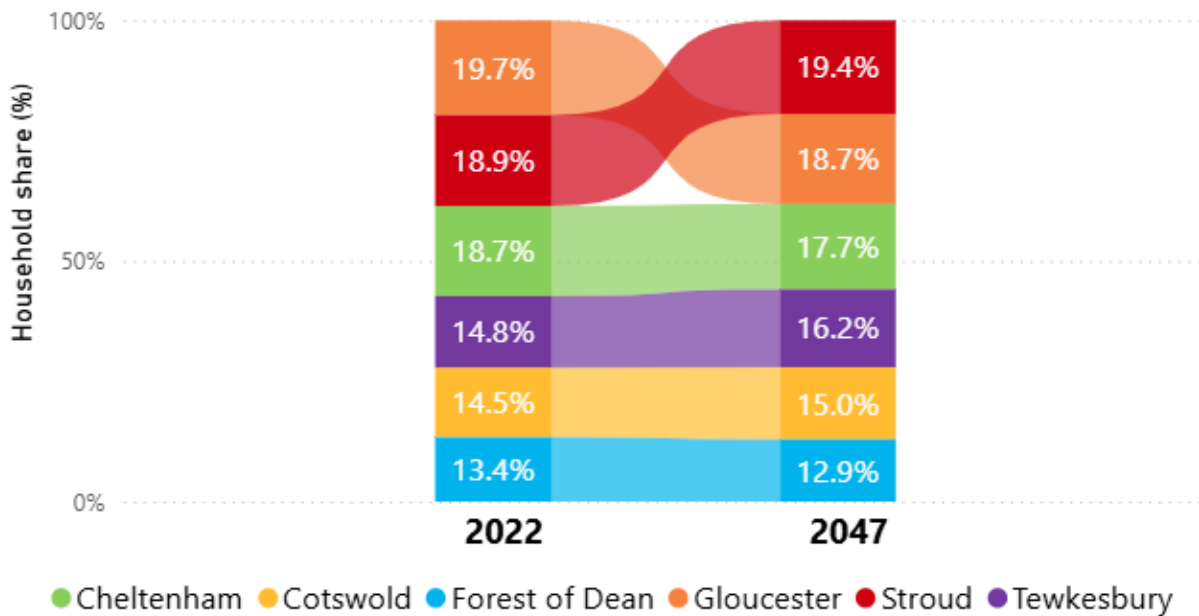


Figure 4: Percentage share of total households by district for 2022 and 2047

Age structure of households

This section looks at the projected changes in the age profile of households, based on the age of the Household Reference Person (HRP), highlighting how the distribution of households across age groups is expected to change at county and district level. The HRP is a statistical concept used to identify a single, representative person within a household, typically defined as the sole householder (owner/renter), or in joint tenancies, the person with the highest income. If incomes are equal, the eldest person is selected.

Changing age profile of households

Figure 5 shows the projected percentage change in households by age of Household Reference Person (HRP) between 2022 and 2047, comparing Gloucestershire with England

While the overall number of households in the county is expected to increase, the most notable changes occur within the older age groups. The largest areas of projected growth

are in households with an HRP aged 75–84 and 85 and over, which is expected to increase in Gloucestershire by 20,537 (58.4%) and 18,626 (124.9%) respectively between 2022 and 2047. This is higher than the growth expected across England, which is 51.9% for 75-84 and 106.5% for the 85 and over age group.

Younger age groups show comparatively modest changes. Households with HRPs aged under 25 are expected to see a very small decrease of 53 households (-0.7%), while those in the 25–54 age range are expected to increase by around 28,721 households (22.9%), which is higher than the projected increase for England at 16.5%. While these groups remain significant in absolute terms, their relative contribution to total household growth is limited compared with the older age groups.

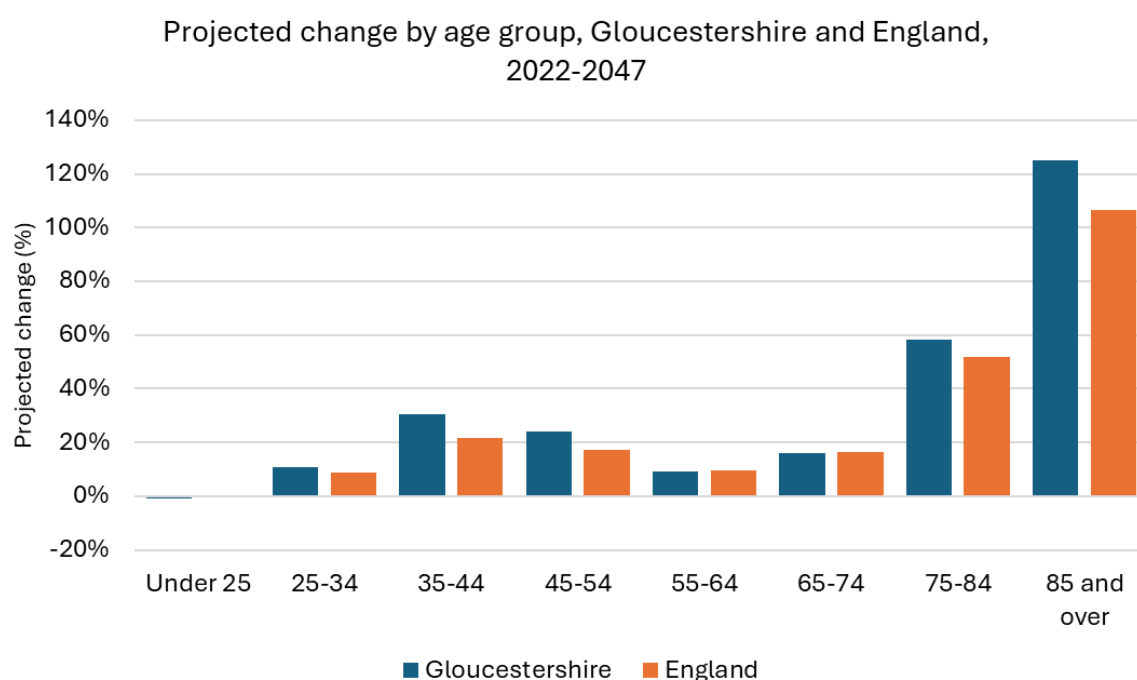


Figure 5: Projected change by age group, Gloucestershire and England, 2022-2047

Figure 6 shows the percentage share of households by age of HRP in 2022 and 2047 for Gloucestershire. This demonstrates a clear structural ageing of households by 2047, with the proportion of households with an HRP aged 75 and over increasing, while the share of younger age groups declines or remains broadly stable.

Percentage (%) share of households by HRP in Gloucestershire, 2022 and 2047

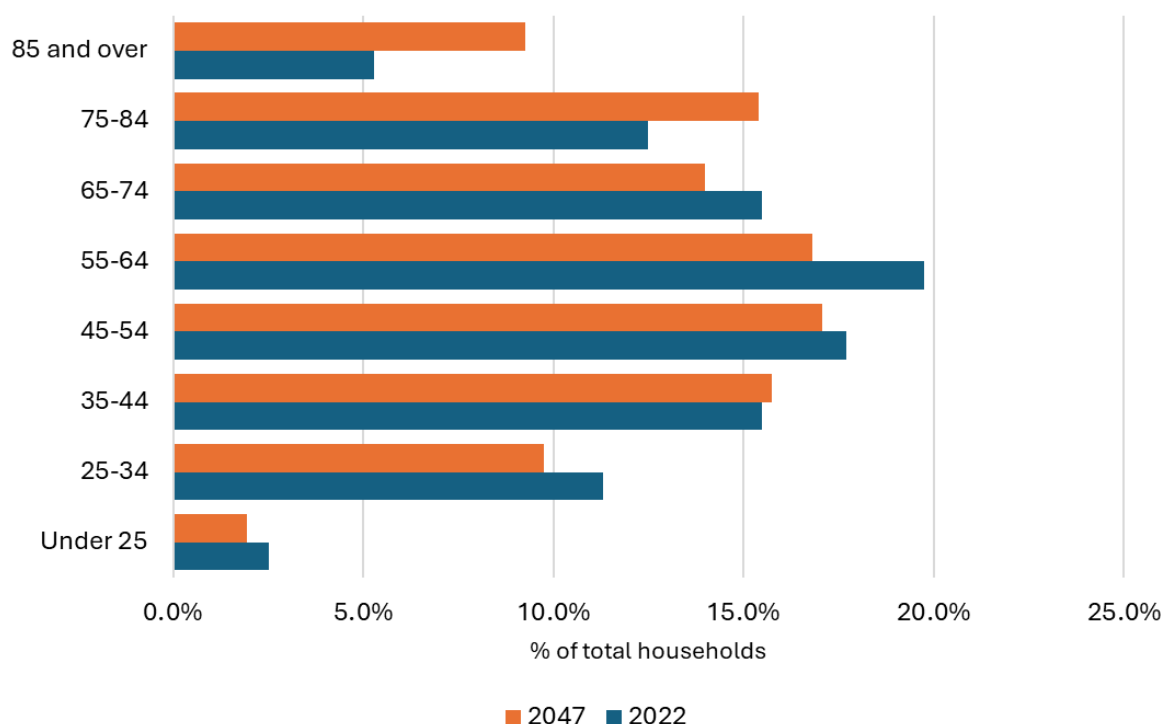


Figure 6: Percentage (%) share of households by HRP in Gloucestershire, 2022 and 2047

Variation between districts

Figure 7 shows the projected changes in households by HRP across Gloucestershire’s districts. Projected household growth is concentrated in the older age groups, particularly those aged 75-84 and 85 and over, reflecting the pattern seen at county level. The greatest growth is expected in households with an HRP aged 85 and over.

The largest proportional increases are projected in Cotswold (140.0%), Tewkesbury (131.4%), Gloucester (123.1%) and Stroud (122.4%). The Forest of Dean (117.8%) and Cheltenham (115.2%) also see growth greater than 100% in this age group. In absolute terms, the largest increases are in Stroud (3,591), Cotswold (3,600) and Gloucester (2,834).

Households with an HRP 75–84 are also expected to see large increases in each district, with the biggest increases seen in Cotswold (66.5%) and Tewkesbury (65.6%), followed by Stroud (58.0%) and Gloucester (56.7%). This reflects the impact of the ageing population which is also seen at county level.

While growth in the 35–54 age range remains positive across all districts, it is more moderate than in the older age groups. Stroud (40.6%) and Tewkesbury (44.2%) are expected to see comparatively bigger increases in households with an HRP aged 35–44,

while Forest of Dean (35.5%) and Cotswold (30.8%) also expect to see notable growth. In contrast, projected increases among those aged 55–64 are relatively modest in most districts, particularly in Cheltenham (3.5%) and Gloucester (3.5%).

Younger age groups are expected to see the lowest growth and, in some cases, decline. Households with an HRP aged under 25 are projected to decrease in the Forest of Dean (-7.7%), Stroud (-6.1%) and Gloucester (-5.4%) while modest increases are projected in Cheltenham (4.6%), Tewkesbury (6.6%) and Cotswold (2.2%). Although there are increases in the younger 25–34 age groups across all districts, these are generally below the rates seen in the older cohorts.

High housing costs are associated with delayed household formation among younger adults. Data from the Office for National Statistics show that 3.6 million people aged 20–34 were living with their parents in the UK in 2024 (28% of that age group), compared with 25.6% in 2014. This may reflect wider economic and housing affordability pressures that can delay the formation of independent households.²

Percentage change by age group, 2022-2047	Under 25	25-34	35-44	45-54	55-64	65-74	75-84	85 and over
Cheltenham	4.6%	8.9%	16.8%	15.0%	3.5%	14.2%	53.8%	115.2%
Cotswold	2.2%	9.8%	30.8%	21.8%	8.8%	20.6%	66.5%	140.0%
Forest of Dean	-7.7%	4.7%	35.5%	22.6%	5.4%	4.8%	49.0%	117.8%
Gloucester	-5.4%	8.8%	23.9%	19.3%	3.5%	14.7%	56.7%	123.1%
Stroud	-6.1%	13.3%	40.6%	28.6%	14.7%	14.6%	58.0%	122.4%
Tewkesbury	6.6%	19.6%	44.2%	38.6%	21.2%	28.9%	65.6%	131.4%
Gloucestershire	-0.7%	10.8%	30.6%	23.9%	9.4%	16.1%	58.4%	124.9%
England	0.2%	9.0%	21.5%	17.1%	9.8%	16.5%	51.9%	106.5%

Key:

	Red = lower growth		Green = higher growth
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Figure 7: Percentage change by age group, comparing Gloucestershire and its districts with England, 2022-2047

Figure 8 shows that the share of households with an HRP aged 75 and over increases in every district between 2022 and 2047. The increase in the combined share of households aged 75 and over is most notable in Cotswold.

² Families and households in the UK: 2024 (ONS)

Percentage (%) share of households aged 75 and over by district, 2022 and 2047

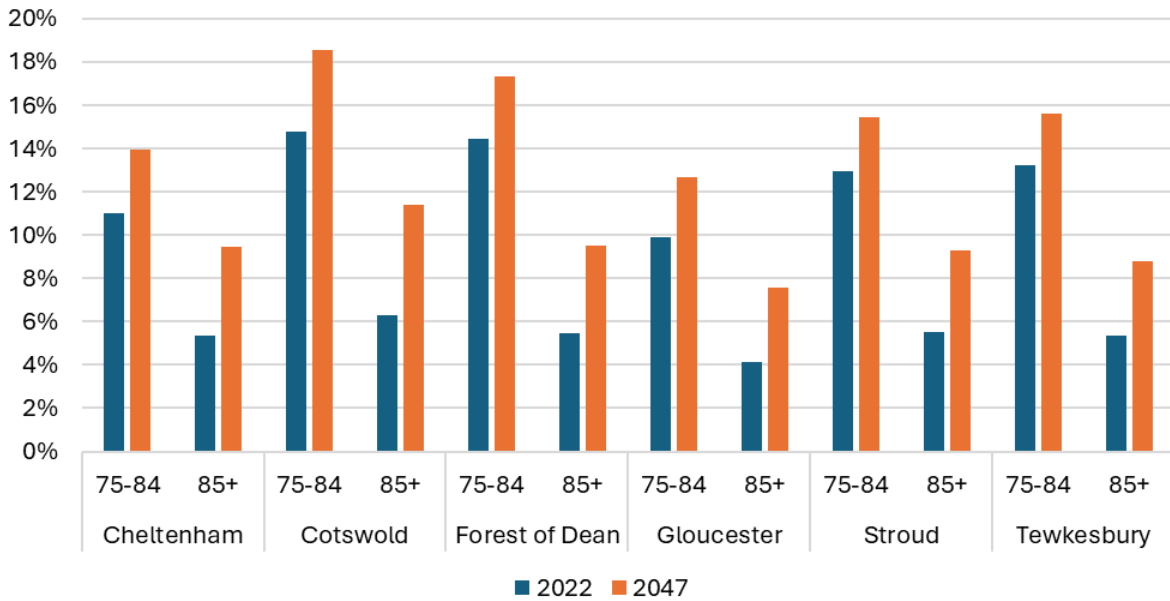


Figure 8: Share of households (%) aged 75 and over by district, 2022 and 2047

Household composition

This section looks at the projected changes in household type, including one person households, households with dependent children and other multi-adult households. It describes how the mix of household types is expected to shift across the county and within individual districts.

Household composition across Gloucestershire

Household type refers to the composition of people living together in a household, based on the number of adults and the presence of dependent children. For clarity and consistency, categories have been aggregated for this analysis. Single male and single female households are combined into a single “one person household” category. Households with one, two or three dependent children are grouped together as “households with dependent children”, while all remaining households are classified as “other households with two or more adults”.

Figure 9 shows the projected percentage change in these household types between 2022 and 2047 for Gloucestershire with England. While the overall number of households in Gloucestershire is expected to increase over this period, growth is uneven across household types. One person households are projected to increase by 44,966 (51.8%),

while other households with two or more adults are projected to grow by 49,619 (40.6%). In contrast, households with dependent children are projected to decrease by 14,517 (-19.9%). These trends are more pronounced in Gloucestershire than nationally, with higher growth in one person households (51.8% compared with 43.6% in England) and a slightly larger decline in households with dependent children (-19.9% compared with -17.5%). Growth in other households with two or more adults is also higher in Gloucestershire (40.6% compared with 35.1% in England). Overall, this indicates a shift towards smaller and adult-only households, which is more pronounced in Gloucestershire than nationally.

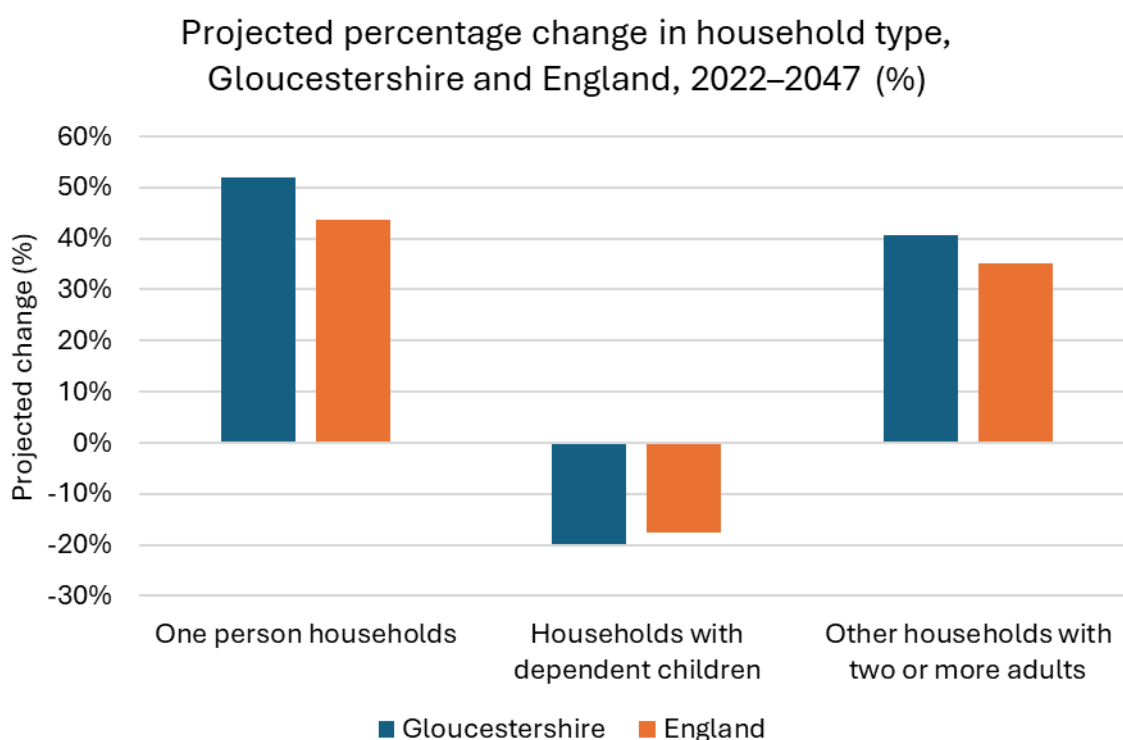


Figure 9: Projected percentage change in household type, Gloucestershire and England, 2022-2047 (%)

Figure 10 shows how these changes affect the overall distribution of household types. In 2022, one person households accounted for 30.8% of all households in Gloucestershire; by 2047 this is projected to increase to 36.4%. Over the same period, the share of households with dependent children is projected to decline from 25.9% to 16.1%, while the proportion of households with two or more adults increases from 43.3% to 47.5%. Together, these changes highlight a significant structural shift in the household profile of Gloucestershire, with a growing share of smaller and adult-only households and a declining proportion of family households with dependent children.

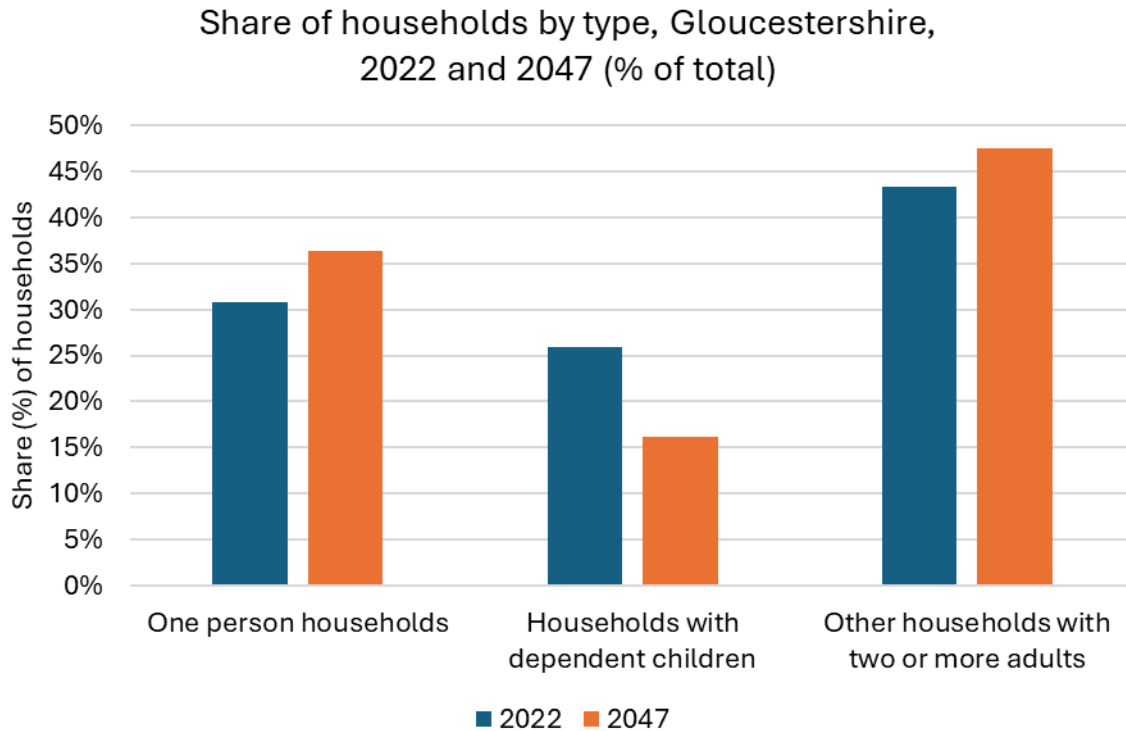


Figure 10: Share of households by type, Gloucestershire, 2022 and 2047 (% of total)

Variation between districts

Across all districts, projected change between 2022 and 2047 follows a consistent pattern of growth in one person households and other multi-adult households, alongside a decline in households with dependent children.

Figure 11 shows that the largest proportional increases in one person households are projected in Tewkesbury (64.5%), followed by Stroud (55.0%) and Cotswold (54.6%), with Cheltenham, Gloucester and the Forest of Dean also seeing substantial increases. Households with dependent children are expected to decline across every district, most notably in Cheltenham (-32.3%) and Gloucester (-30.5%), with more moderate decreases seen elsewhere. Other households with two or more adults increase in all districts, particularly in Tewkesbury and Stroud.

Percentage change by household composition 2022 - 2047	One person households	Households with dependent children	Other households with two or more adults
Cheltenham	43.6%	-32.3%	35.0%
Cotswold	54.6%	-11.3%	40.3%
Forest of Dean	47.5%	-24.1%	34.7%
Gloucester	49.7%	-30.5%	38.8%
Stroud	55.0%	-12.0%	42.6%
Tewkesbury	64.5%	-4.7%	53.1%
Gloucestershire	51.8%	-19.9%	40.6%
England	43.6%	-17.5%	35.1%

Key:

	Red = lower growth		Green = higher growth
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Figure 11: Percentage change by household composition, comparing Gloucestershire and its districts with England, 2022-2047

While Figure 11 highlights differences in the rate of growth between household types across districts, Figure 12 shows the percentage point change in the share of each household type between 2022 and 2047. Across every district, the proportion of one person and other multi-adult households increases, while the share of households with dependent children declines. The largest reductions in the share of family households are projected in Gloucester and Cheltenham, whereas increases in the share of one person households are relatively consistent across districts.

Although the scale of change varies, the overall direction of structural change is consistent throughout the county, with household composition becoming increasingly weighted towards smaller and adult-only households.

Percentage point change in household share by district, 2022–2047

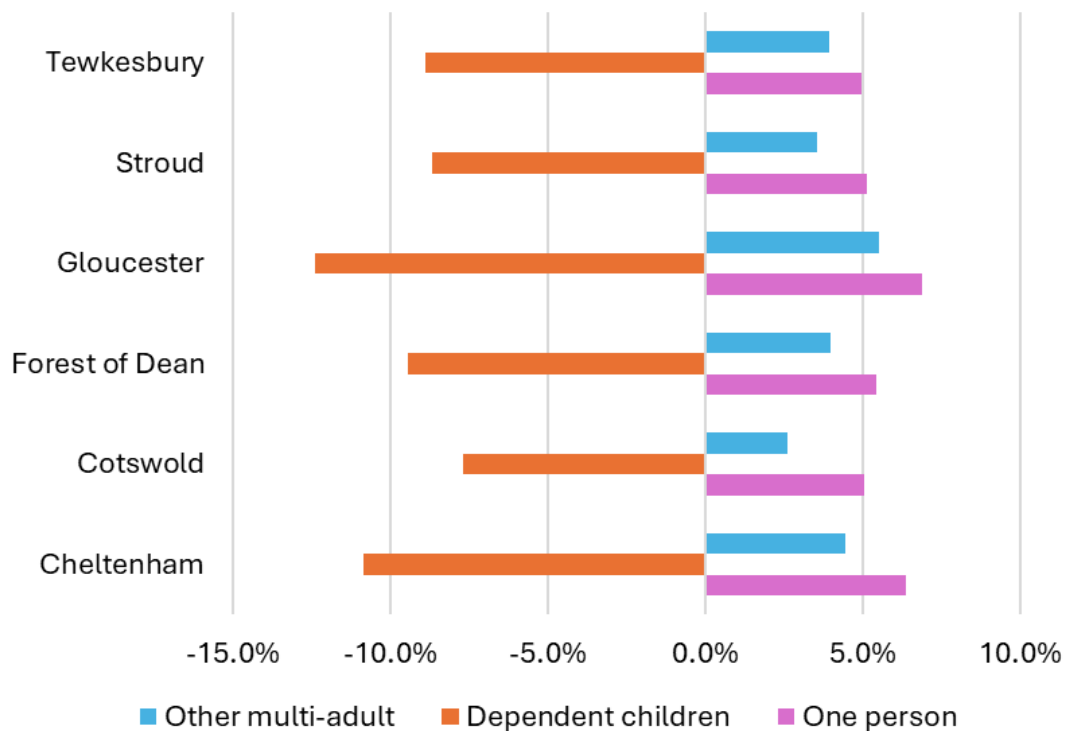


Figure 12: Percentage point change in household share by district, 2022-2047

Average household size

The following section looks at the projected changes in average household size between 2022 and 2047. Average household size represents the mean number of people per household and provides an overall indicator of changes in household composition and living arrangements over time.

Average household size across Gloucestershire

Across Gloucestershire, average household size is projected to decline steadily between 2022 and 2047, falling from 2.28 persons per household to 2.09, a reduction of 0.19 persons per household.

This is in part driven by the projected growth in one person households and the decline in households with dependent children identified earlier. As smaller and adult-only households become more common, the average number of people living in each household falls accordingly.

Figure 13 shows the projected reduction in Gloucestershire (-0.19) mirrors the national trend. England’s average household size is projected to decline from 2.38 to 2.19 over the same period, also a reduction of 0.19. Although Gloucestershire starts from a lower baseline, both follow a similar downward trajectory.

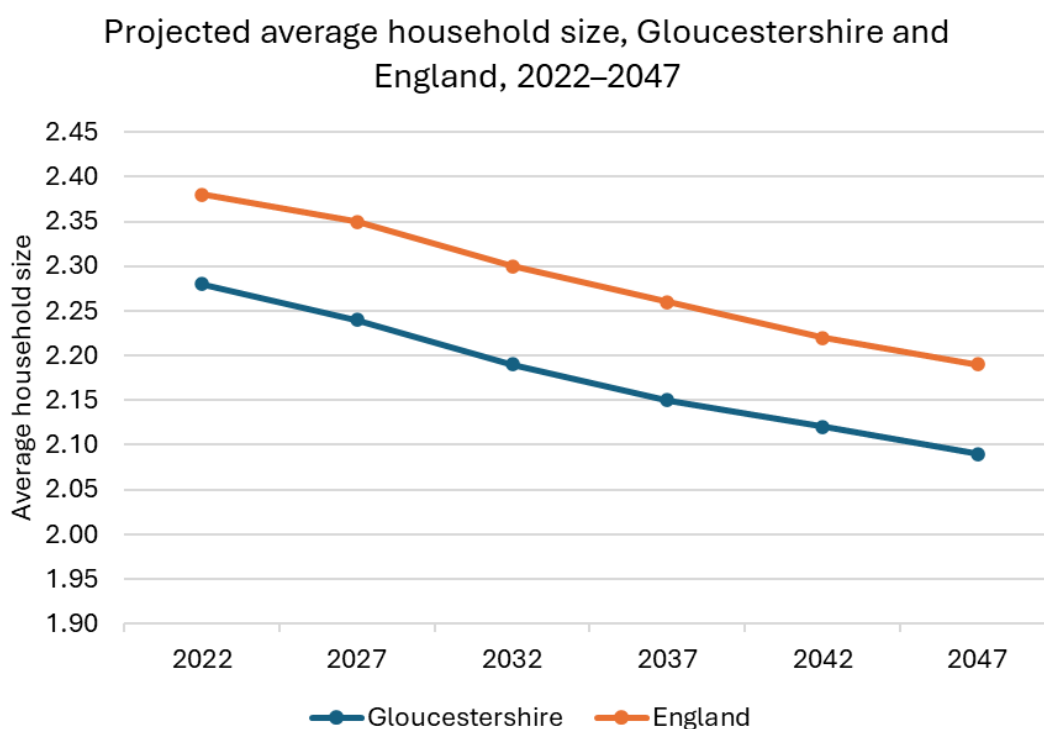


Figure 13: Projected average household size, Gloucestershire and England, 2022-2047

District level variation

Figure 14 shows the projected trend in average household size across Gloucestershire’s six districts between 2022 and 2047. The chart highlights a consistent downward trajectory in all areas, while also illustrating differences in starting levels and the relative scale of decline.

In 2022, Gloucester records the largest average household size (2.38), followed by Tewkesbury (2.31) and Stroud (2.29). Cotswold (2.21) and Cheltenham (2.20) begin with comparatively smaller averages.

Between 2022 and 2047, average household size is projected to fall in every district. Gloucester experiences the largest reduction (-0.24), declining from 2.38 to 2.14. Cheltenham (-0.20) and Cotswold (-0.18) also record notable decreases, while Forest of Dean, Stroud and Tewkesbury each see reductions of around 0.17 persons per household.

Projected average household size by district,
2022–2047

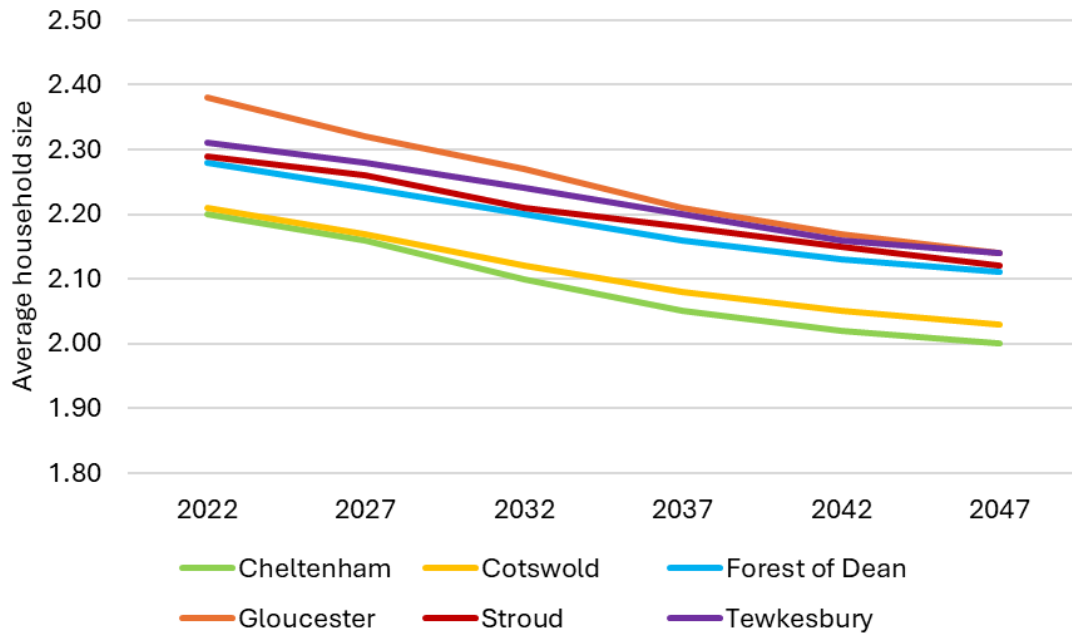


Figure 14: Projected average household size by district, 2022-2047

Variant Projections

In addition to the main household projection used in this report (the migration category variant), the Office for National Statistics publishes several alternative projection variants based on different assumptions about future migration. These variants illustrate how projected household numbers could differ if migration levels were higher or lower than those used in the main projection.

Figure 15 shows Gloucestershire’s household projections under the migration-category variant alongside four alternative migration scenarios. The differences between these scenarios reflect varying assumptions about future migration and their impact on household growth. The 10-year migration variant uses longer-term trends rather than short term assumptions, while the high- and low-migration variants show how growth could increase or decrease if migration is higher or lower than expected. The zero-migration scenario provides a purely illustrative baseline, showing how household numbers would change in the absence of migration and highlighting its contribution to overall growth.

Figure 16 then shows the projected household growth for each of Gloucestershire’s six districts between 2022 and 2047 under these same migration scenarios.

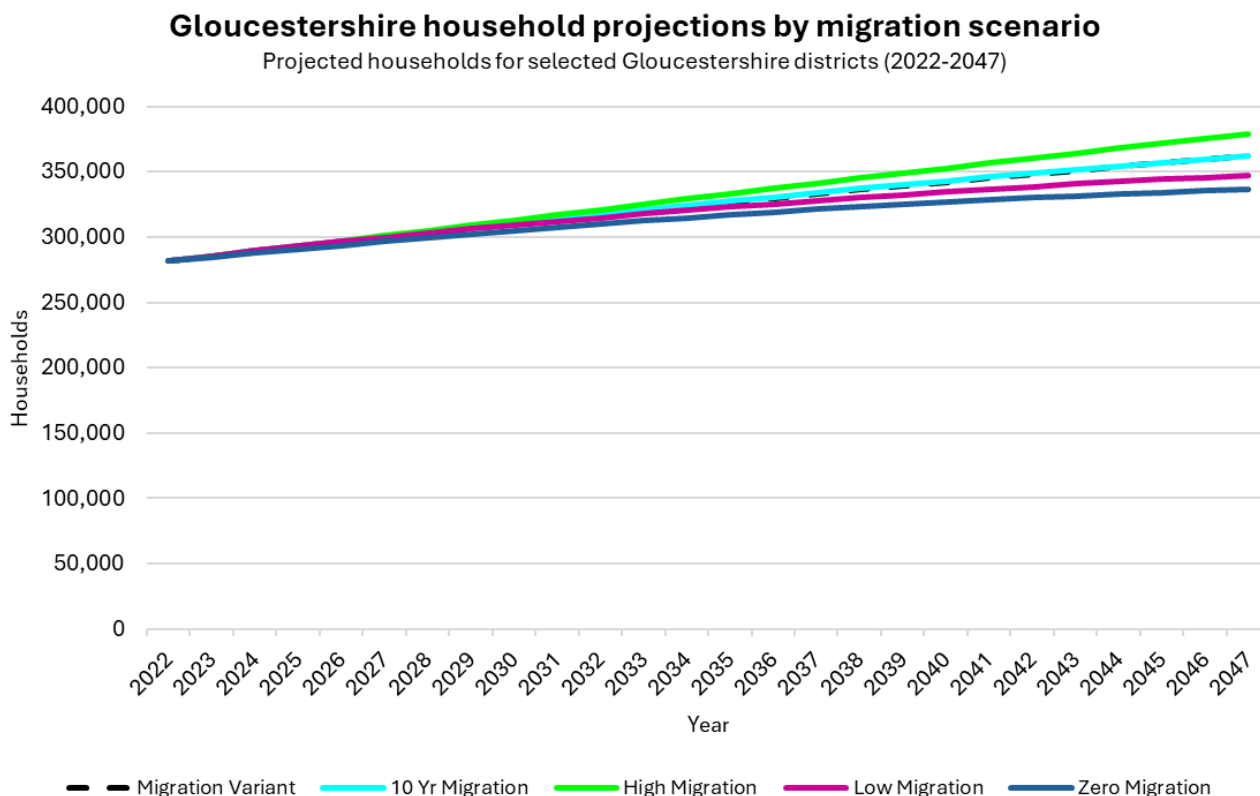


Figure 15: Gloucestershire household projections by migration scenario

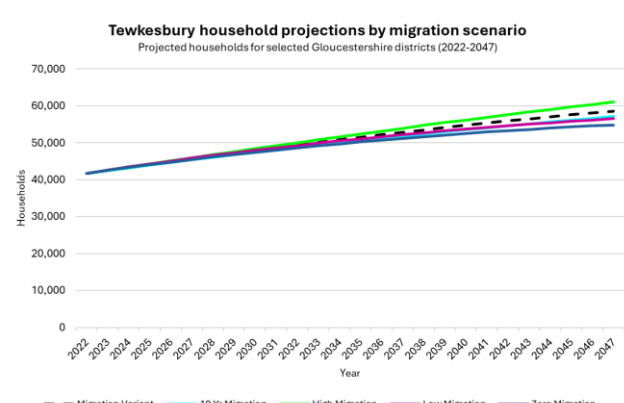
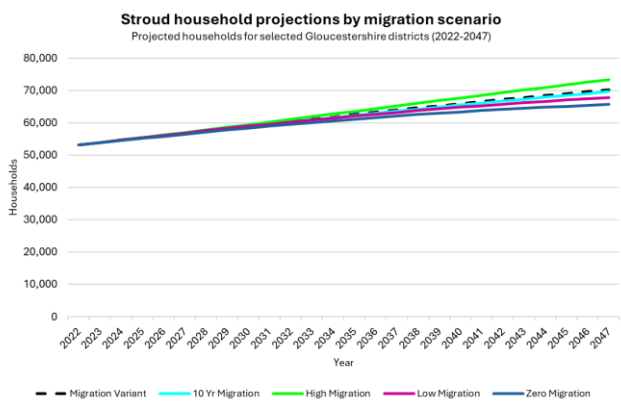
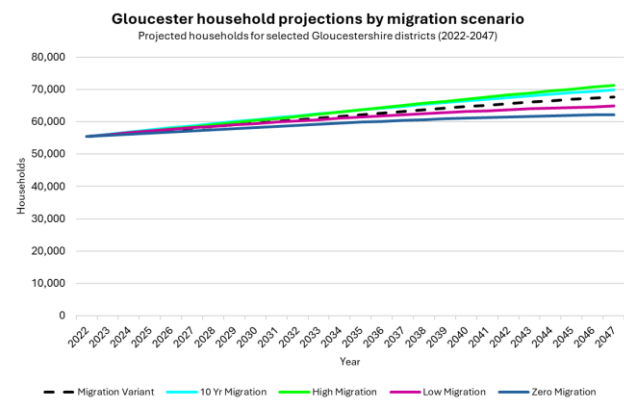
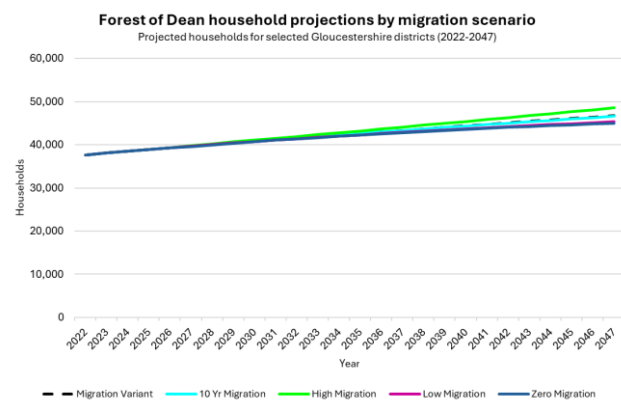
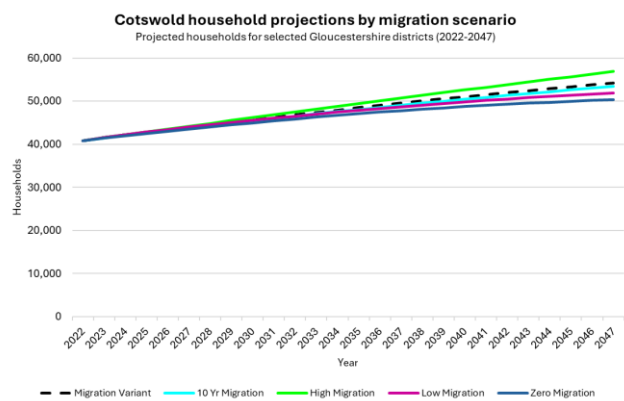
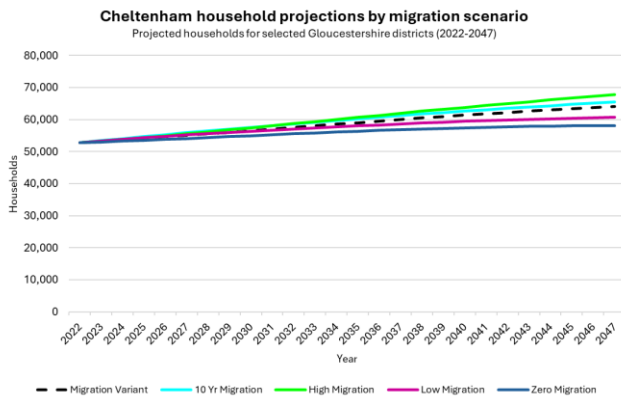


Figure 16: Projected households for selected Gloucestershire districts (2022-2047)