

InformGloucestershire

Population Projections for Gloucestershire

2018-2043

An Overview

Data & Analysis Team

Gloucestershire County Council

informgloucestershire@gloucestershire.gov.uk



Projected Population Change

Assuming current population trends continue, the Office for National Statistics (ONS) projections suggest that the population in Gloucestershire will rise by 50,291 between 2018 and 2028; rising from 633,558 to 683,849. This increase of 7.9% of the 2018 population is equivalent to an average annual increase of 0.8% per annum. Between 2028 and 2043, the population is projected to rise to 738,482 - an increase of 8.0% of the 2028 population.

Over the full 25 year period of the ONS projections, the Gloucestershire population is projected to increase by 16.6% to 738,482 people, with an annual average growth rate of 0.6%. These projections are substantially higher than those for England.

Within the county, Tewkesbury and Cotswold are projected to have the largest percentage increases in population over the next 25 years (30.8% and 26.8% respectively). Cheltenham is projected to have the smallest increase (6.0%), and is the only district with a predicted growth below the national projection for 2043.

Population growth is a similar picture throughout most local authorities nationally. The ONS states that the populations of all but 22 local authorities are projected to grow by mid-2028. Tewkesbury is projected to have the greatest percentage increase of all 317 local authorities nationally, growing 16.4% by 2028. This is mainly because of a high level of net internal migration¹ (*See caveats at end of report*). Between 2018 and 2043, Tewkesbury's population is projected to grow by 30.8%, which could mean Tewkesbury would have the second greatest percentage increase of all local authorities nationally, with only North West Leicestershire projected to have a greater growth at 34.4% by 2043.

Table 1: Projected population changes in Gloucestershire by district 2018 to 2043

	Number of people			Projected population growth (%)			Rank of Projected Change in Population (1=highest increase, out of 317 LA's in England)		
	2018	2028	2043	2018 to 2028	2028 to 2043	2018 to 2043	2018 to 2028	2018 to 2043	
Gloucestershire	633,558	683,849	738,482	7.9	8.0	16.6	-	-	
Cheltenham	117,090	119,209	124,127	1.8	4.1	6.0	255	223	
Cotswold	89,022	101,499	112,907	14.0	11.2	26.8	10	12	
Forest of Dean	86,543	93,754	101,222	8.3	8.0	17.0	63	60	
Gloucester	129,285	134,686	142,757	4.2	6.0	10.4	171	146	
Stroud	119,019	126,882	136,363	6.6	7.5	14.6	98	83	
Tewkesbury	92,599	107,819	121,106	16.4	12.3	30.8	1	2	
England	55,977,178	58,751,651	61,744,098	5.0	5.1	10.3	-	-	

¹ ONS, Subnational Population Projections Statistical Bulletin

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/bulletins/subnationalpopulationprojectionsforengland/2018based>

Projected Changes in Age Structure

Tables 2 and 3 show the projected changes in the age structure of the Gloucestershire population. The notable feature of the projections is the sharp increase in population in the age group 65 or over, which is projected to increase from 134,973 in 2018 to 205,865 in 2043. The percentage increase of 52.5% over this period is higher than the national trend for England (at 44.7%). This shows that by 2043, the proportion of people in Gloucestershire who are aged 65 or over is predicted to rise from 21.3% of the population to 27.9%.

By contrast, the population of children and young people (those aged 0-19) is projected to show a much smaller percentage rise of 7.6% over the twenty-five year period, whilst the working age population (those aged 20-64) is projected to rise by 6.5% over the same period. However, these percentage increases in Gloucestershire are higher than the national trend for these age groups at 0.7% and 3.5% respectively.

These changes will see the working age population account for a smaller proportion of the total population falling from 56.2% in 2018 to 51.4% in 2043.

Table 2: Projected population change by age group, 2018 to 2043

Age	Number of people in Gloucestershire			% increase 2018-2028		% increase 2028-2043	
	2018	2028	2043	Gloucestershire	England	Gloucestershire	England
All Ages	633,558	683,849	738,482	7.9	5.0	8.0	5.1
0-19	142,244	149,860	153,049	5.4	2.2	2.1	-1.4
20-64	356,341	366,696	379,567	2.9	1.5	3.5	1.9
65+	134,973	167,288	205,865	23.9	19.6	23.1	21.0

Table 3: Age structure of Gloucestershire population, 2018 to 2043 (%)

Age	Percentage of Population (%)					
	2018		2028		2043	
	Gloucestershire	England	Gloucestershire	England	Gloucestershire	England
0-19	22.5	23.7	21.9	23.0	20.7	21.6
20-64	56.2	58.2	53.6	56.2	51.4	54.5
65+	21.3	18.2	24.5	20.7	27.9	23.9

Tables 4a and 4b show in greater detail the predicted growth in the population aged over 65 from 2018 to 2043. From 2018 to 2028, the greatest percentage increase is predicted to be in the age group 75-84 (an increase of 41.7%), whilst from 2028 to 2043, the increase will be greatest in the age group 85 or over (an increase of 104.3%). These changes mean that by 2043, the proportion of people in the county who are aged 85 or over will have risen from 2.8% to 5.0%.

Table 4a: Projected change in population aged over 65, 2018 to 2043

Age	Number of people in Gloucestershire			% increase 2018 to 2028		% increase 2028 to 2043	
	2018	2028	2043	Gloucestershire	England	Gloucestershire	England
65-74	73,376	82,388	88,220	12.3	10.4	20.2	7.3
75-84	43,576	61,747	80,821	41.7	33.9	85.5	27.9
85+	18,021	23,153	36,824	28.5	22.8	104.3	52.6

Table 4b: Age structure of Gloucestershire population aged over 65, 2018 to 2043 (%)

Age	Percentage of Population (%)					
	2018		2028		2043	
	Gloucestershire	England	Gloucestershire	England	Gloucestershire	England
65-74	11.6	9.9	12.0	10.4	11.9	10.6
75-84	6.9	5.8	9.0	7.4	10.9	9.1
85+	2.8	2.4	3.4	2.9	5.0	4.1

Projected Population in the Districts

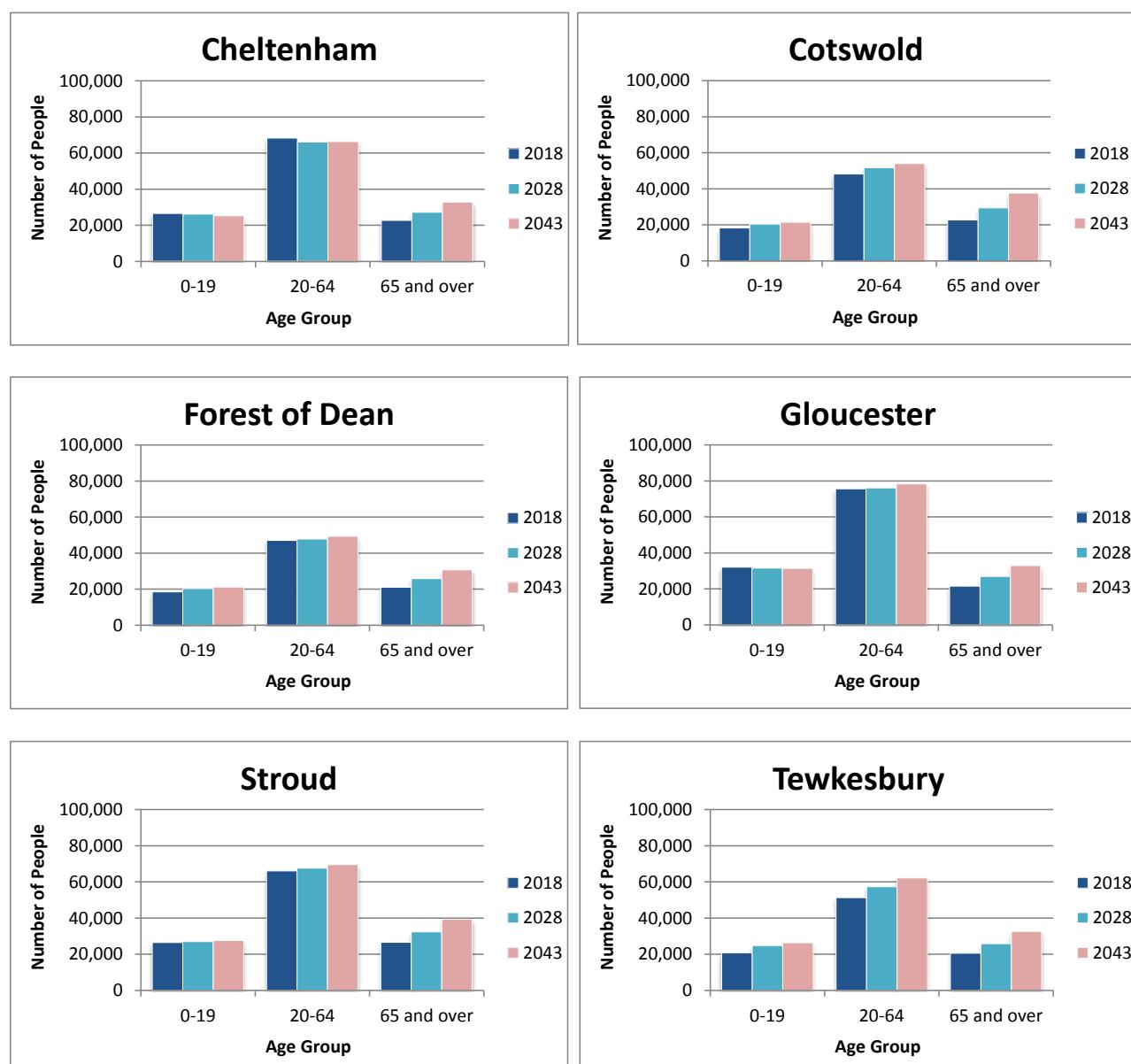
Table 5 shows the projected percentage population changes for each Gloucestershire district for the period 2018 to 2043 whilst Figure 1 shows the projected population changes by number of people for each district for the same period.

- In all three age groups, the projected percentage increases in overall population are greatest in Cotswold and Tewkesbury.
- Amongst the 0-19 age group, the projected percentage increase is greatest for Tewkesbury (26.6%). All other districts are also predicted to see an increase, except Cheltenham and Gloucester where this age group is predicted to shrink by 4.8% and 1.9% respectively.
- For the working age group (those aged 20-64), the borough of Tewkesbury is predicted to have the greatest percentage increase (21.1%). By comparison, this age group is expected to shrink in Cheltenham by 2.8%.
- Considerable percentage increases in the 65+ age group are predicted in all districts. The increase is predicted to be greatest in Cotswold (65.1%) and lowest in Cheltenham (45.5%).

Table 5: Projected population changes in the Gloucestershire districts by age group, 2018 to 2043

Age	Projected % increase (2018 to 2043)					
	Cheltenham	Cotswold	Forest of Dean	Gloucester	Stroud	Tewkesbury
0-19	-4.8	18.1	14.7	-1.9	4.4	26.6
20-64	-2.8	12.0	4.9	3.6	5.3	21.1
65 and over	45.5	65.1	45.8	52.8	47.6	59.3
All ages	6.0	26.8	17.0	10.4	14.6	30.8

Figure 1: Projected number of people in the Gloucestershire districts by age group, 2018 to 2043



Variant Population Projections

The data used throughout this report are from the ONS' principal 2018-based subnational population projections (SNPPs). However, the ONS also publishes variant SNPPs. They differ in the following ways:

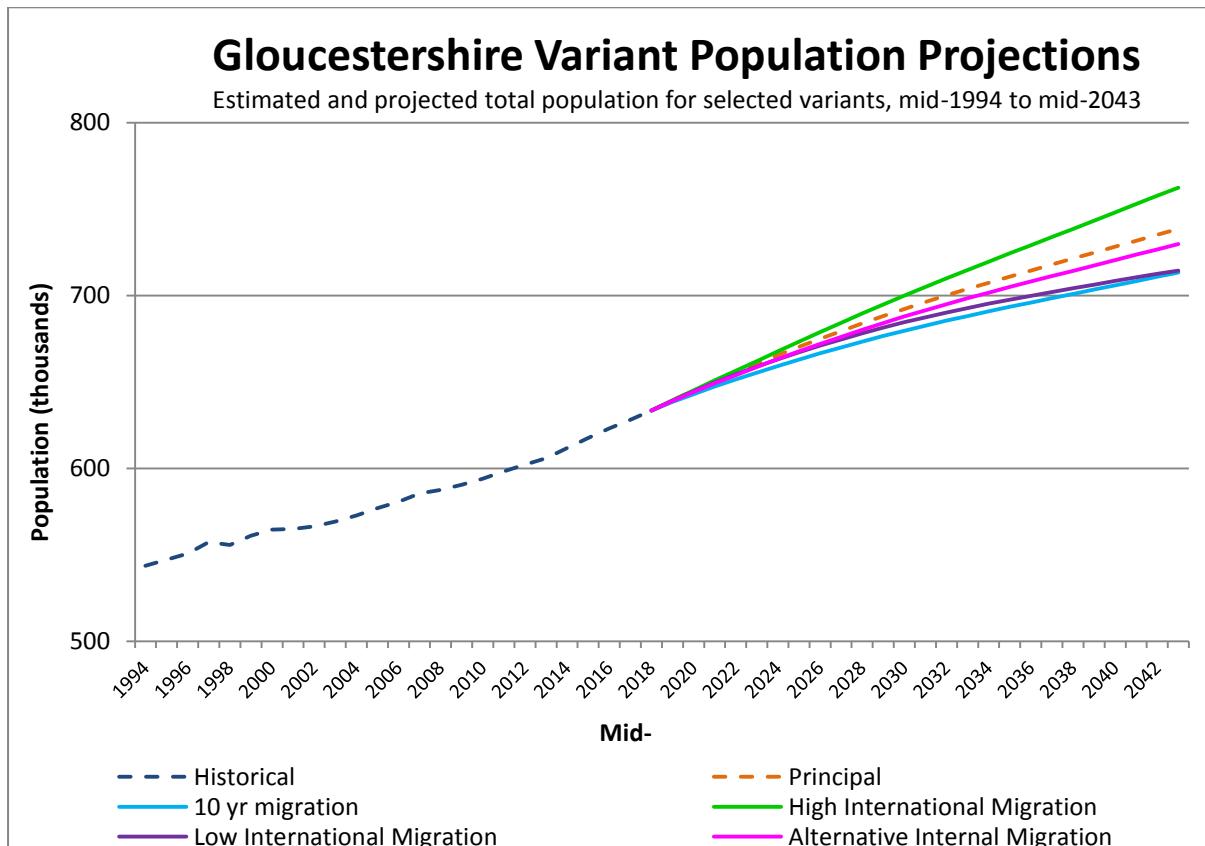
The principal projection is based on recent local population changes, but these are also constrained to the total England principal projection in the 2018-based national population projections (NPPs).

The 2018-based variant projections are:

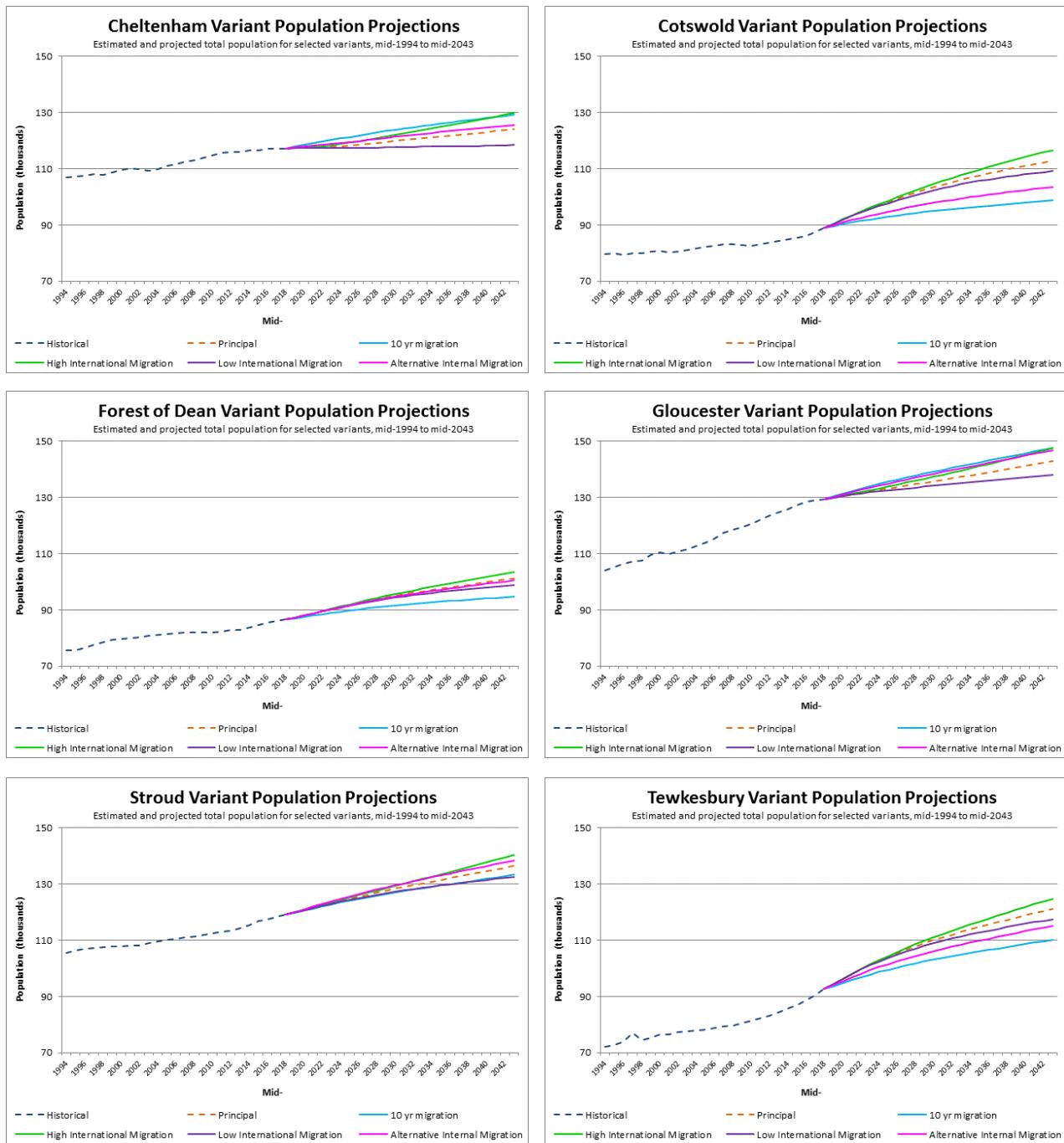
- High international migration variant SNPPs, which sum to the totals in the England high migration variant in the 2018-based NPPs.
- Low international migration variant SNPPs, which sum to the totals in the England low migration variant in the 2018-based NPPs.
- Alternative internal migration variant SNPPs – these have the same England totals as the principal projection, but use five years of internal migration trend data rather than two to inform the local distributions.
- 10-year migration variant SNPPs – these also have the same England totals as the principal projection, but use ten years of migration trend data (internal, cross-border and international) to inform the local distributions.

Figure 2 shows the population projections for these variants against the principal projections, for Gloucestershire and the districts.

Figure 2 – Estimated and projected total population for selected variants, mid-1994 to mid-2043²



² ONS, National population projections, variant projections: 2018-based
<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/methodologies/nationalpopulationprojectionsvariantprojections2018based>



About the projections

National population projections by age and sex are produced for the UK and its constituent countries every 2 years, by the Office of National Statistics. The projections are based on the most recently available mid-year population estimates (the mid-2018 estimates in this case) and a set of underlying assumptions regarding future fertility, mortality and migration. It is important to note that they do not attempt to predict the impact that future government policies, changing economic circumstances or other factors (for example, government policies on immigration or student fees), might have on demographic behaviour (however, the projections of people of pensionable age do take account of future changes in State Pension Age under existing legislation). Projections become increasingly uncertain the further they are carried forward.

Caveats

1. Using Local Authority Population Projections

The ONS have stated the following caveats when comparing local authority population projections:

Population projections at local authority level are especially subject to any limitations of the source data, as well as annual local fluctuations in those sources. In addition, actual local population change will be strongly influenced by local economic development and housing policies. On that basis you should be cautious when comparing different areas' exact numbers or growth rates.³

In addition, ONS states that these projections do not predict the impact of political circumstance such as the UK's withdrawal from the European Union.⁴

Any impact from the COVID-19 pandemic, which was ongoing at the point of release of these data, will not be factored into these projections.

2. Data Errors due to Cross Border Migration Projections

A notice from the ONS website on 22 May 2020 states that there is an error in the 2018-based subnational population estimates:

The error was caused by incorrect processing of cross-border flows between Wales and England, resulting in the projected mid-2028 population for Wales being

³ ONS, Subnational Population Projections Statistical Bulletin

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/bulletins/subnationalpopulationprojectionsforengland/2018based>

⁴ Ibid.

approximately 65,000 too low, and that for England being approximately 65,000 too high.⁵

Although the projections for Wales will be revised, those in England will remain unchanged.

Although differences in cross-border flows would affect local authorities close to the England-Wales border (e.g. Gloucestershire) more than those elsewhere, ONS have stated that the size of the cross-border error over the first decade of the projection for every local authority is less than their latest measure of uncertainty around their population estimates, and would therefore not affect the validity of existing estimates.⁶

Data Source: Office of National Statistics, Subnational Population Projections.

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/datasets/localauthoritiesinenglandz1>

⁵ ONS, National Population Projections: 2018-based

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/bulletins/nationalpopulationprojections/2018based>

⁶ Gloucestershire County Council correspondence with ONS