

# Population

August 2008



Leading learning and skills

## Information Service

**Purpose:** This document forms the 'population' section of the South West Strategic Analysis 2008. The Strategic Analysis is the annual 'stock-take' analysis and considers labour market intelligence, performance information and Government policy to develop a full strategic picture of current education and training marketplace. The analysis is supported by national skills research (including Skills in England Report 2007, National Employer Skills Survey and Working Futures). The stock-take provides the intelligence to confirm our strategies and priorities.

**Theme:** Population

**Origin:** Matt Jago, Research Team, Learning, Planning and Performance Directorate, South West Regional Office

**Issue:** 1

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## Contents

<b>Key Points</b> .....	3
<b>Population Change 2001-2006</b> .....	5
Figure 1: Change in total population 2001-2006.....	5
Figure 2: Percentage change in total population 2001-2006 .....	6
Figure 3: Change in age 16-19 population 2001-2006.....	7
Figure 4: Percentage change in age 16-19 population 2001-2006 .....	8
Figure 5: Change in working age population 2001-2006 .....	9
Figure 6: Percentage change in working age population 2001-2006.....	10
Figure 7: Change in retirement age population 2001-2006.....	11
Figure 8: Percentage change in retirement age population 2001-2006 .....	12
Figure 9: Percentage points difference between total population as proportion of South West total 2001 and 2006 .....	13
<b>Components of population change</b> .....	14
Figure 10: Components of population change, 2007-2008, %.....	14
Figure 11: Components of population change, 000s, 2007-08, SW Region .....	15
Figure 12: Components of population change, 2007/08, 000s .....	15
<b>Population Projections</b> .....	16
Figure 13: Population projections – total population in SW LSC areas.....	16
Figure 14: Population projections – 15-19 year olds in SW LSC areas .....	17
Figure 15: Population projections – working age in SW LSC areas.....	18
Figure 16: Population projections – working age in BDP&S local authorities .....	19
Figure 17: Population projections – retirement age in SW LSC areas.....	19
Figure 18: Population projections – retirement age in the West of England .....	20
Figure 19: Population projections – LSC area total population as a proportion of SW total population.....	21
Figure 20: Population projections – LSC area 15-19 year olds as a proportion of SW 15-19 year olds .....	21
Figure 21: Population projections – LSC area working age populations as a proportion of SW working age population .....	22
Figure 22: Population projections – West of England retirement age populations as a proportion of SW retirement age population .....	23

## Key Points

- > The population of the South West was 5.1 million in 2006, ranking seventh largest out of the nine regions in England<sup>1</sup>.
- > The largest population in the South West is to be found in Devon & Cornwall. Between 2001 and 2006, this area experienced the greatest numerical population growth in terms of its total, 16-19 and retirement age populations of the four LSC areas. It came close second to the West of England in terms of working age population growth.
- > Across total, working age and retirement age, the local authorities of Bournemouth, Poole and Dorset consistently recorded some of the slowest population growth of the region and in some cases decline, both in numerical and proportional terms. The exception to this is when looking at percentage increases in the 16-19 population - Dorset experienced the greatest increase across the region and Poole also scored more highly than the South West average.
- > The West of England lags behind the other LSC areas of the South West in increases in 16-19 and retirement age populations, both numerically and proportionately, however it recorded a greater number and proportion of extra working age people between 2001 and 2006 than the other areas.
- > No one local authority or LSC area is growing or shrinking out of proportion to the South West total.
- > Population increase in the South West is being driven by migration and as such, the learning and skills needs of migrants and the target-relevant qualifications that they bring with them should be considered when planning learning and skills provision.
- > Steady increases in populations are predicted across the region with larger initial populations set to gain the most people.
- > Reductions in the number of 15-19<sup>2</sup> year olds until the early 2020s are forecast, at which point the numbers start to increase, reaching levels by 2031 that are the same or higher than in 2006.
- > Working age populations are set to increase, however across all areas the rate of increase is predicted to slow, with the local authorities of Bournemouth, Dorset and Poole forecast to experience reduced numbers of working age people by the early 2020s.
- > Retirement age populations are set to grow at an ever increasing rate.
- > Over the next 25 years, the proportions of each of the South West's age groups located in different LSC areas are not set to change drastically.
- > A Parliamentary Select Committee stated in May 2008 that:
  - *“The amount of population turnover, both nationally and locally has made it increasingly difficult for the current methods of counting the population to estimate the numbers of people in an area and on what basis they are there”.*

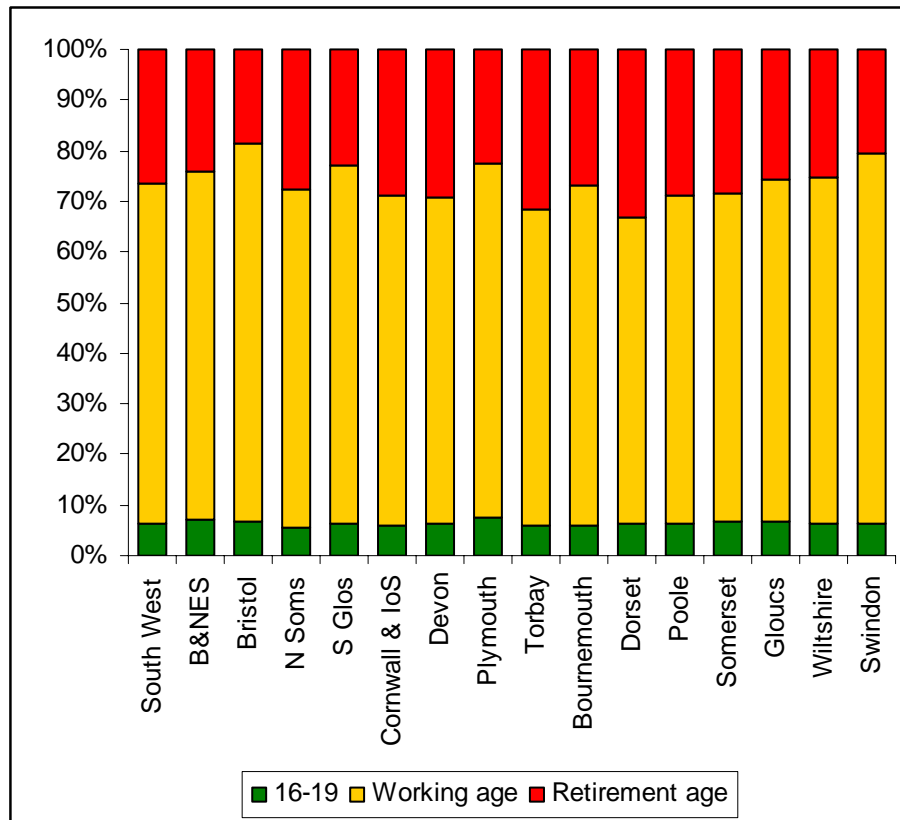
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<sup>1</sup> Source: ONS Mid year population estimates 2006.

<sup>2</sup> Data available for population projections is banded into 15-19 year olds. As such it is not possible to break down into the 16-19 age band as used elsewhere in this report

- “There are substantial problems in generating accurate population estimates in some Local Authority areas”.
- “The current methods of estimating internal migration are unsatisfactory”<sup>3</sup>.

## Population age distribution



Source: ONS 2006 mid-year population estimates

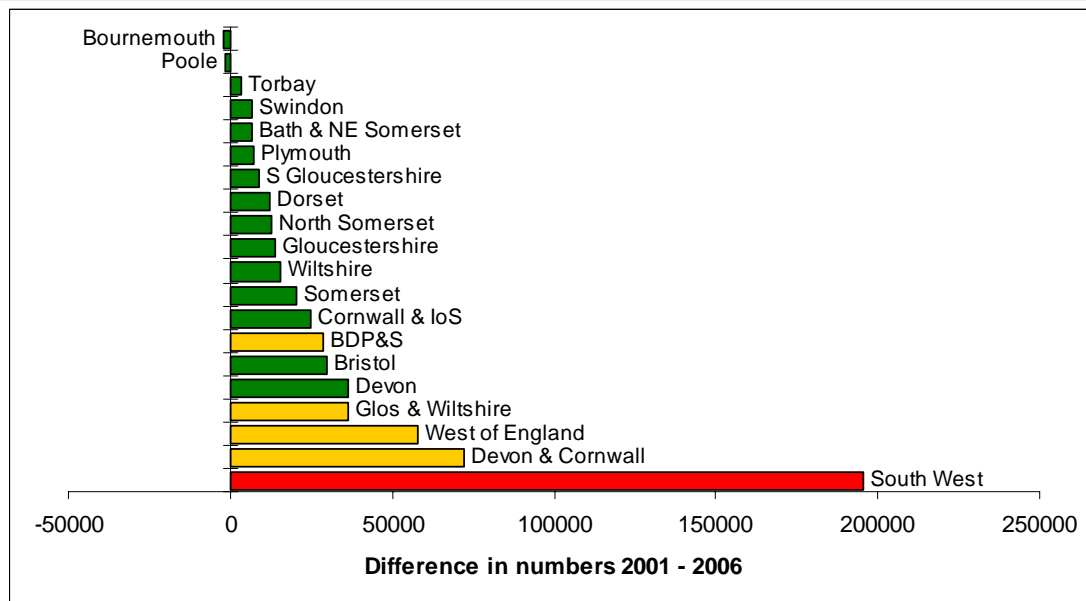
- > More than 9 of every 10 residents aged over 16 falls into the 20+ age category. This pattern is repeated across all of the region’s local authority areas.
- > Most of the local authority areas of the region have between 60% and 70% of the population falling into the working age<sup>4</sup> band. The exceptions are South Gloucestershire [71%], Swindon [73%] and Bristol [75%], which are home to higher proportions of people of working age than the other local authority areas.
- > Torbay and Dorset have higher proportions of retirement age residents than the other local authority areas of the South West. More than 3 out of every ten residents falls into this category in these authority areas.

<sup>3</sup> <http://www.publications.parliament.uk/pa/cm200708/cmselect/cmtreasy/183/183.pdf>

<sup>4</sup> Working age is defined as women aged 20-59 and men aged 20-64

## Population Change 2001-2006

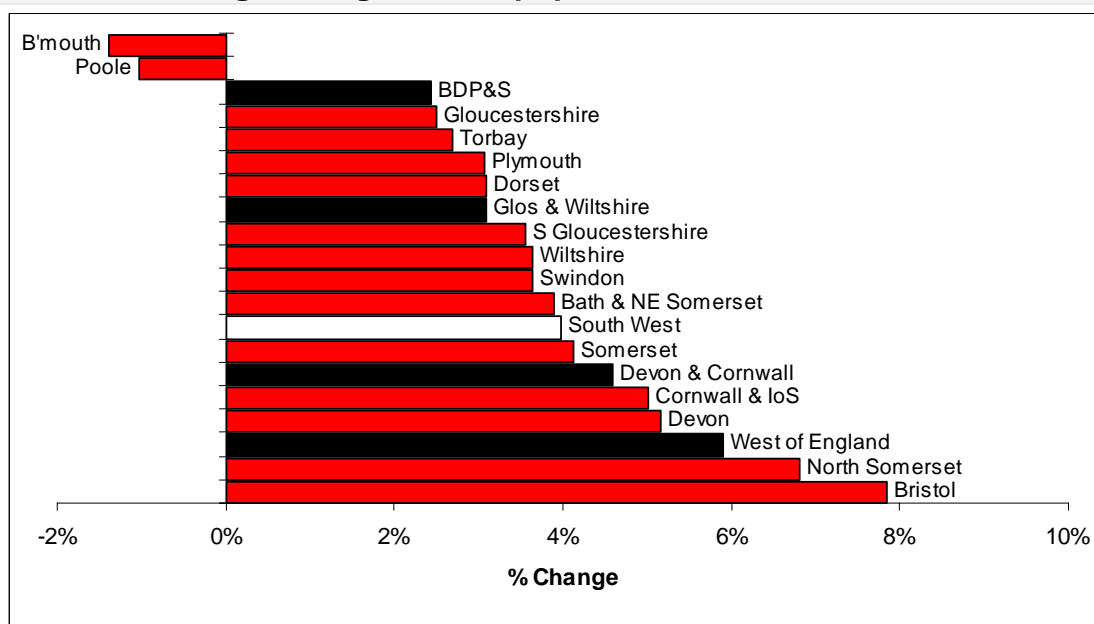
Figure 1: Change in total population 2001-2006



Source: Census 2001 and ONS Population Estimates 2006

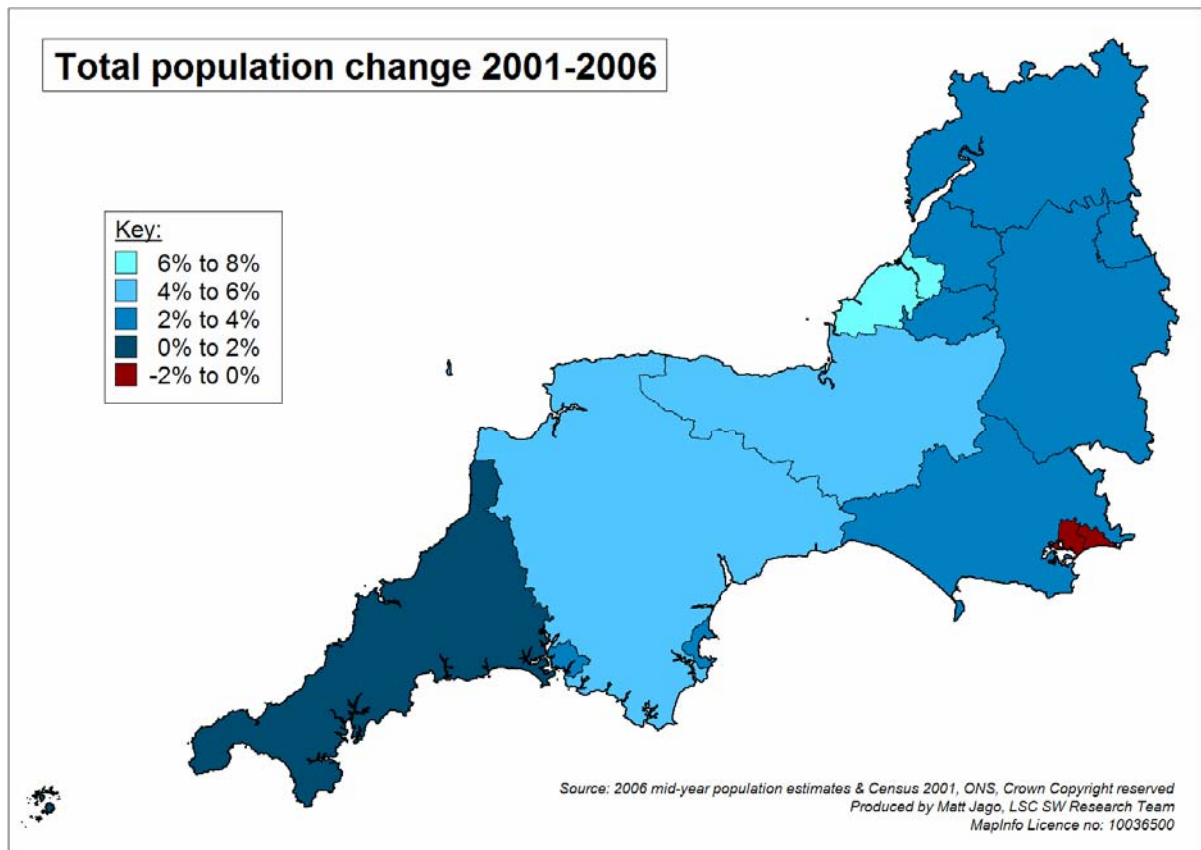
- > Between 2001 and 2006 the South West region showed a population increase of over 195,000 people.
- > Of the LSC areas, Devon & Cornwall recorded the greatest increase in population, with over 72,000 extra people.
- > Bournemouth, Dorset, Poole & Somerset had the smallest population increase (just under 29,000), which is partly attributed to reductions in the populations of Bournemouth and Poole. These local authorities were the only authorities in the South West to experience reduced populations.

**Figure 2: Percentage change in total population 2001-2006**

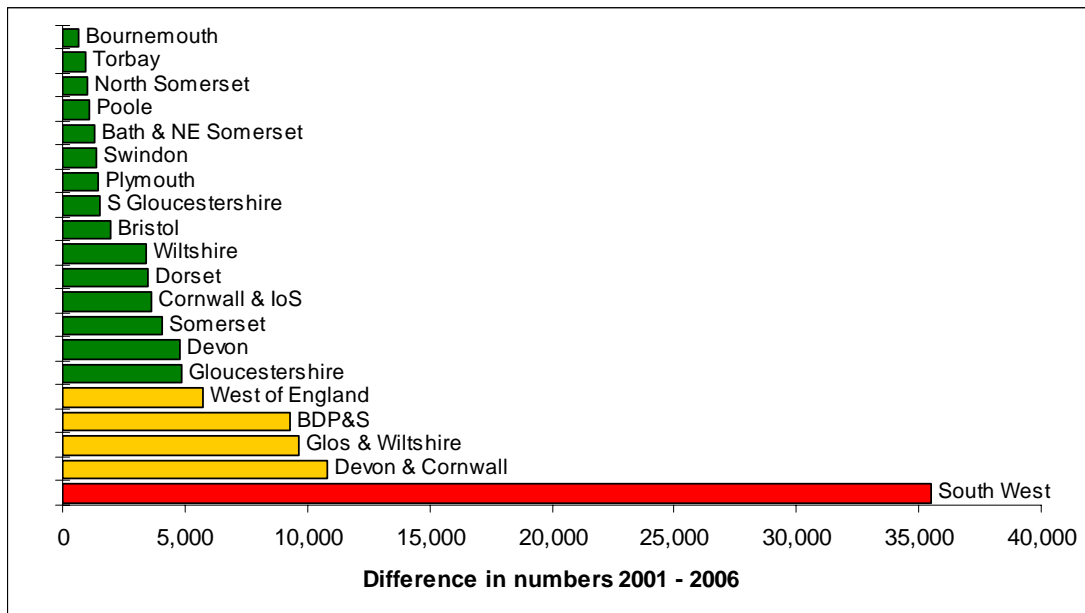


Source: Census 2001 and ONS Population Estimates 2006

- > The greatest percentage increase in total population between 2001 and 2006 was shown by Bristol, which registered a 7.8% rise. North Somerset was only a single percentage point behind with 6.8%, and the West of England area as a whole showed a 5.9% increase.
- > Three other local authorities (Devon, Cornwall and Somerset) and one LSC area (Devon & Cornwall) recorded increases greater than the South West as a whole, which experienced a rise of 4%.
- > All other local authorities and LSC areas showed increases in proportions of the total population lower than the South West except Bournemouth and Poole, which both experienced decreases of more than 1%.



**Figure 3: Change in age 16-19 population 2001-2006**

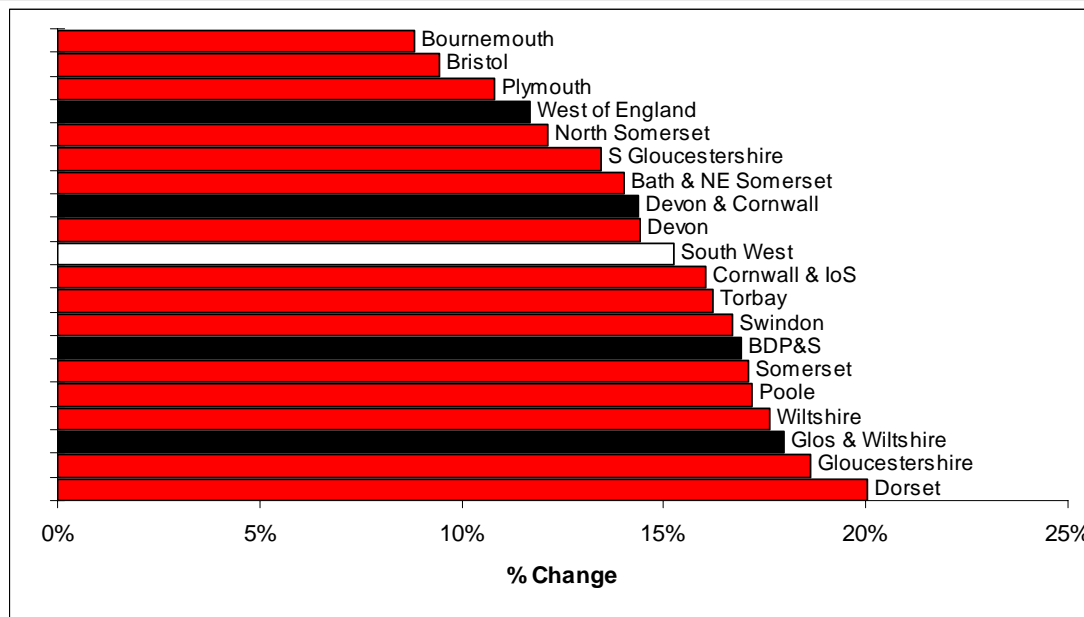


*Source: Census 2001 and ONS Population Estimates 2006*

- > Between 2001 and 2006, the South West region recorded an increase in the age 16-19 population of over 35,000 people.
- > Devon & Cornwall experienced the largest increase of the region's LSC areas with almost 10,800 more 16-19 year olds in 2006 than in 2001.

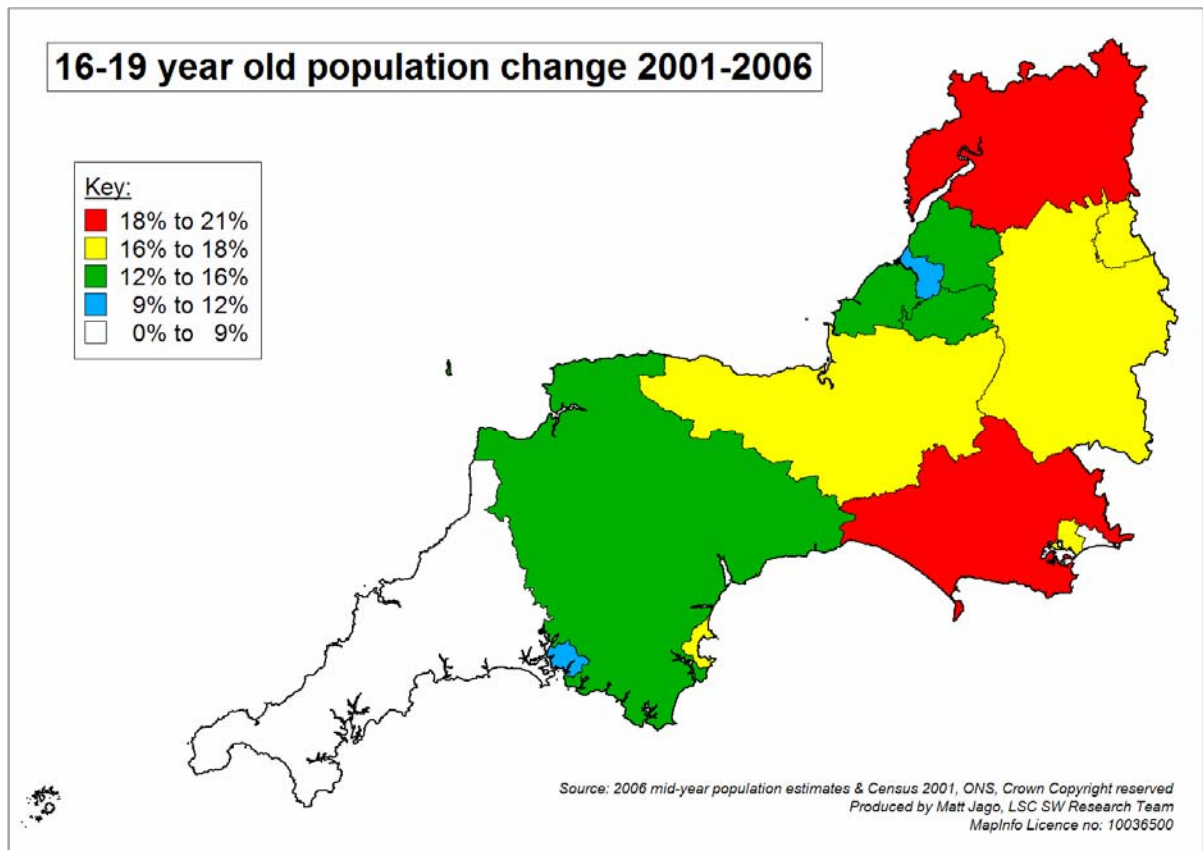
- > Reductions in the 16-19 year old population occurred in no local authority areas.

**Figure 4: Percentage change in age 16-19 population 2001-2006**

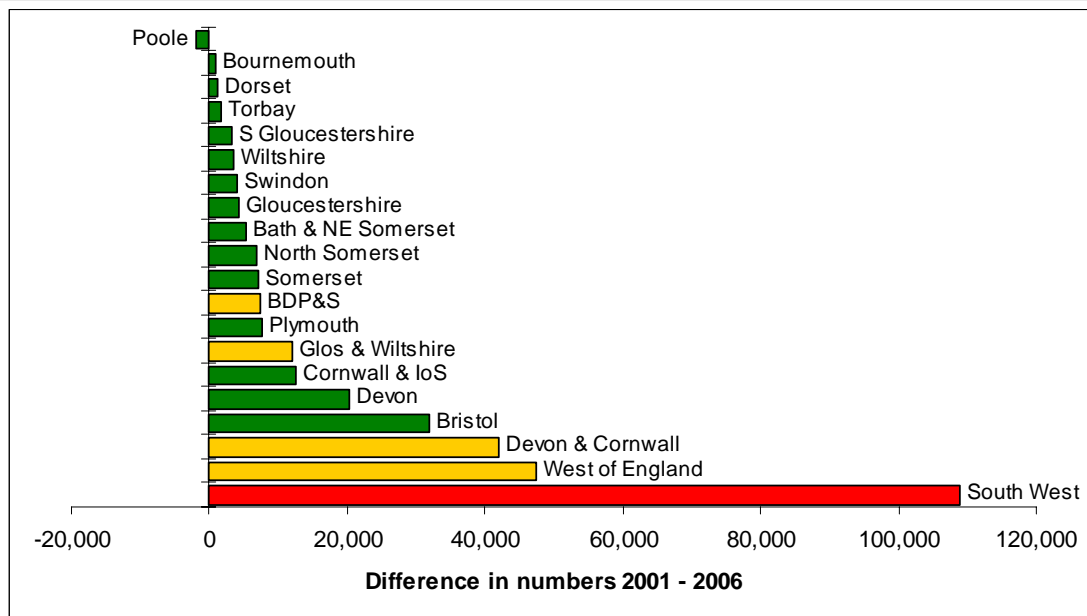


Source: Census 2001 and ONS Population Estimates 2006

- > Between 2001 and 2006, the South West region and all LSC areas and local authorities within it experienced increases in their age 16-19 populations of more than 8%.
- > The smallest increase was shown by Bournemouth, with 8.8%.
- > The South West region recorded an increase of 15.2%. Eight local authorities and two LSC areas experienced greater increases, with Dorset in particular registering a 20.1% rise.



**Figure 5: Change in working age population 2001-2006**

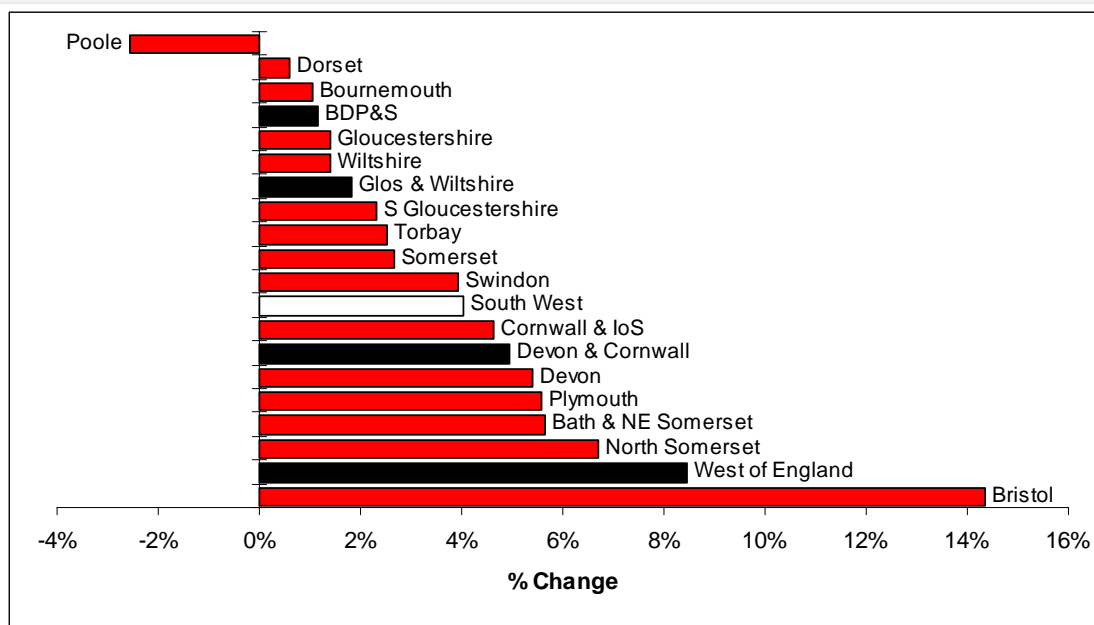


Source: Census 2001 and ONS Population Estimates 2006

> Between 2001 and 2006, the working age population in the South West increased by almost 109,000 people.

- > Both the West of England and Devon & Cornwall LSC areas recorded increases of over 40,000 people (47,500 and 42,000 respectively).
- > The city of Bristol recorded a considerably larger increase in this population than the other local authorities, with almost 32,000 more 20-59/64 year olds in 2006 compared to 2001.
- > The only decrease in population in this age range and time period was in Poole, which fell by almost 2,000 people.

**Figure 6: Percentage change in working age population 2001-2006**

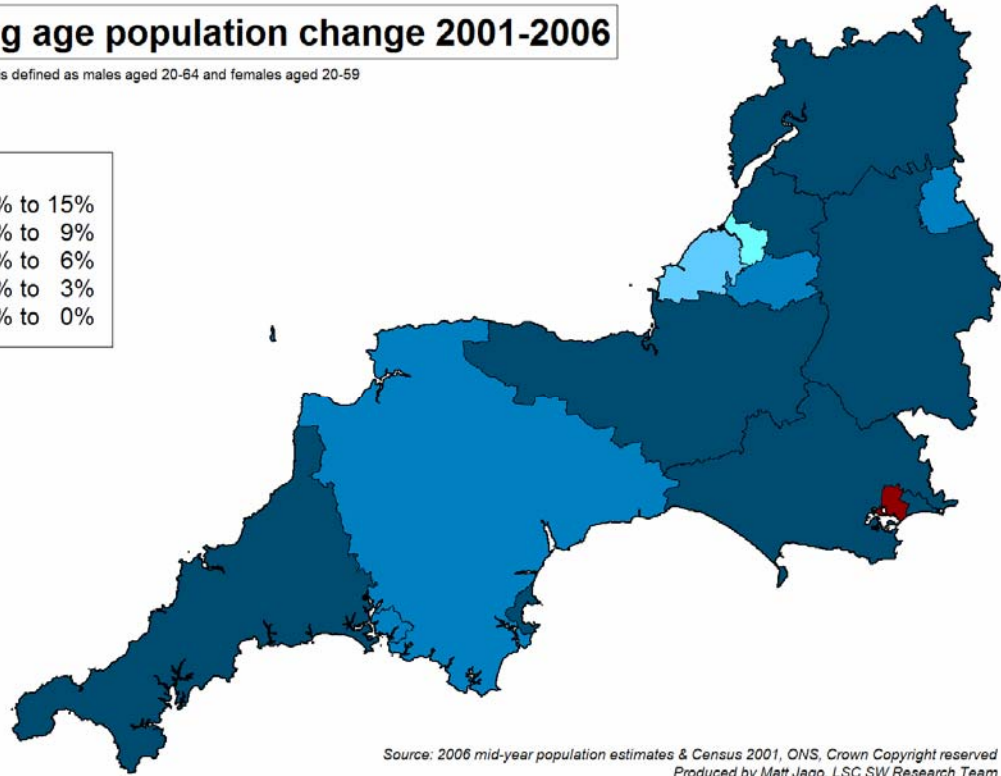
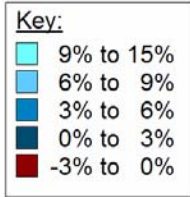


Source: Census 2001 and ONS Population Estimates 2006

- > As well as recording the largest increase in working age population between 2001 and 2006, Bristol showed the largest percentage increase of working age people. It was 14.4% up on 2001 in 2006. The local authority with the next largest percentage change was North Somerset with 6.7%.
- > West of England recorded the greatest change compared to the other LSC areas (8.5%).
- > The South West region was 4% up on 2001 in 2006.
- > The only decrease was shown by Poole, which recorded 2.6% fewer working age people in 2006 than in 2001.

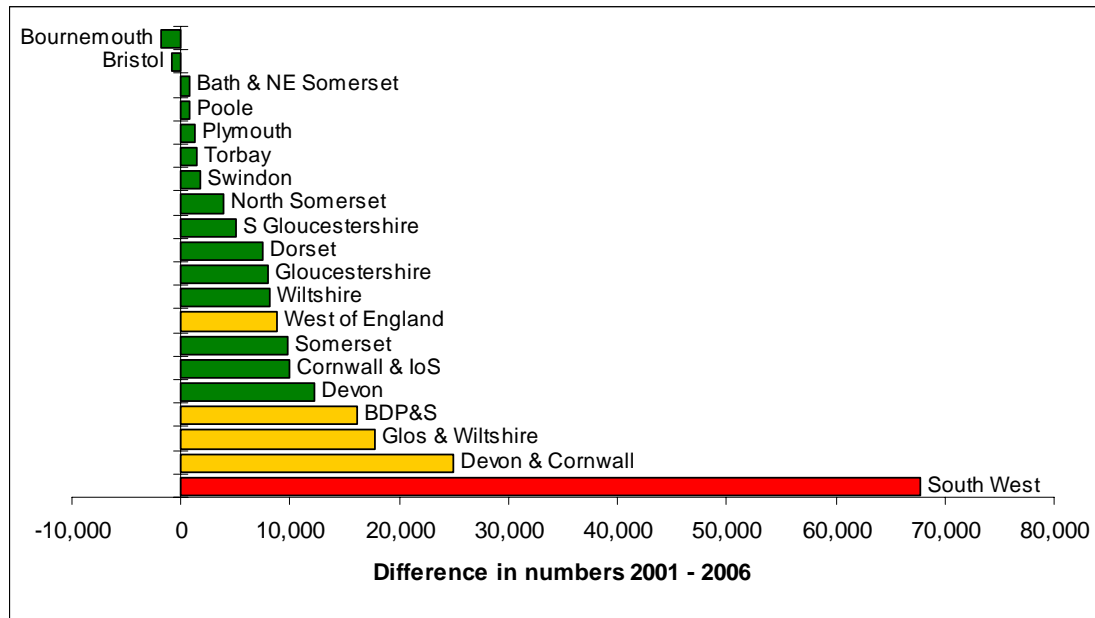
## Working age population change 2001-2006

Note: Working age is defined as males aged 20-64 and females aged 20-59



Source: 2006 mid-year population estimates & Census 2001, ONS, Crown Copyright reserved  
Produced by Matt Jago, LSC SW Research Team  
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Figure 7: Change in retirement age<sup>5</sup> population 2001-2006



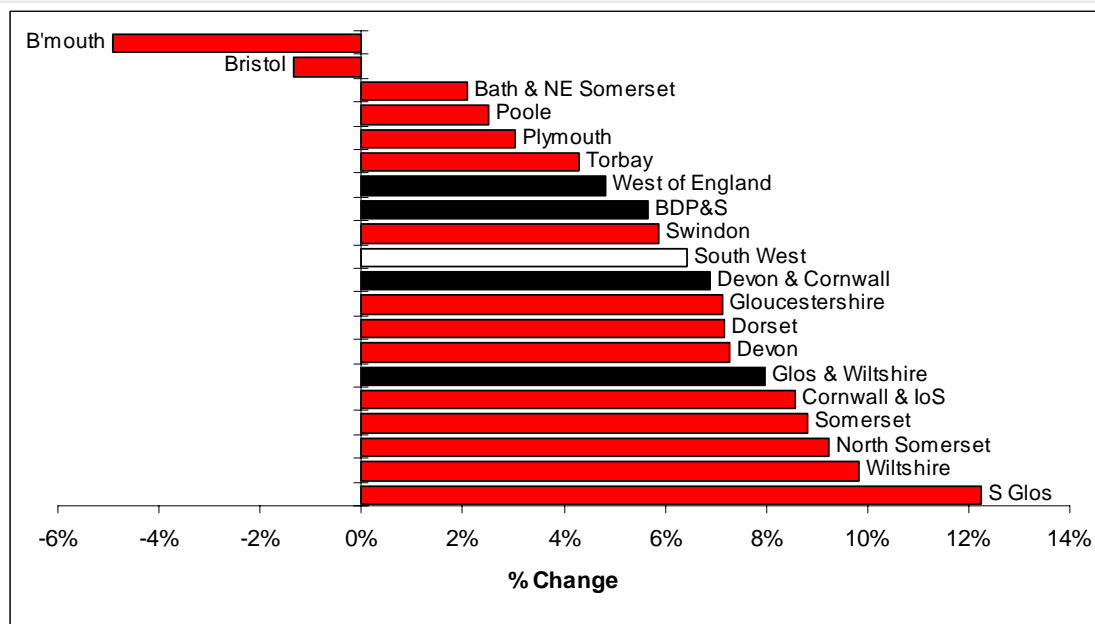
Source: Census 2001 and ONS Population Estimates 2006

> Between 2001 and 2006, the retirement age population in the South West increased by 67,676 people.

<sup>5</sup> Retirement age is defined as women aged 60 and over and men aged 65 and over

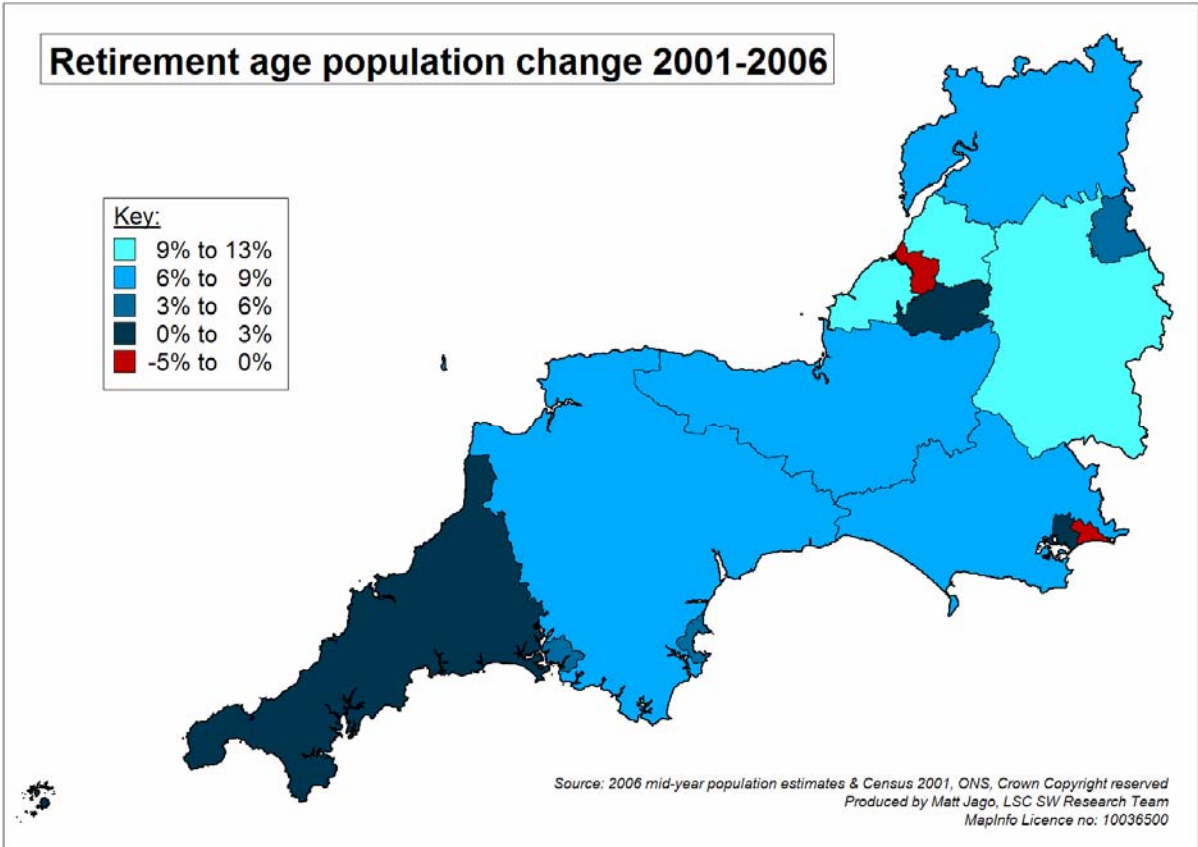
- > Of the LSC areas, Devon & Cornwall showed the largest gain, with close to 25,000 more retirement age people in 2006 than in 2001. This was contributed to by Devon and Cornwall being the two local authorities experiencing the largest increases (12,268 and 9,924 people respectively).
- > Two local authorities recorded decreases in their 60/65+ year old populations. Bristol dropped by 855 people and Bournemouth by 1,882.

**Figure 8: Percentage change in retirement age population 2001-2006**

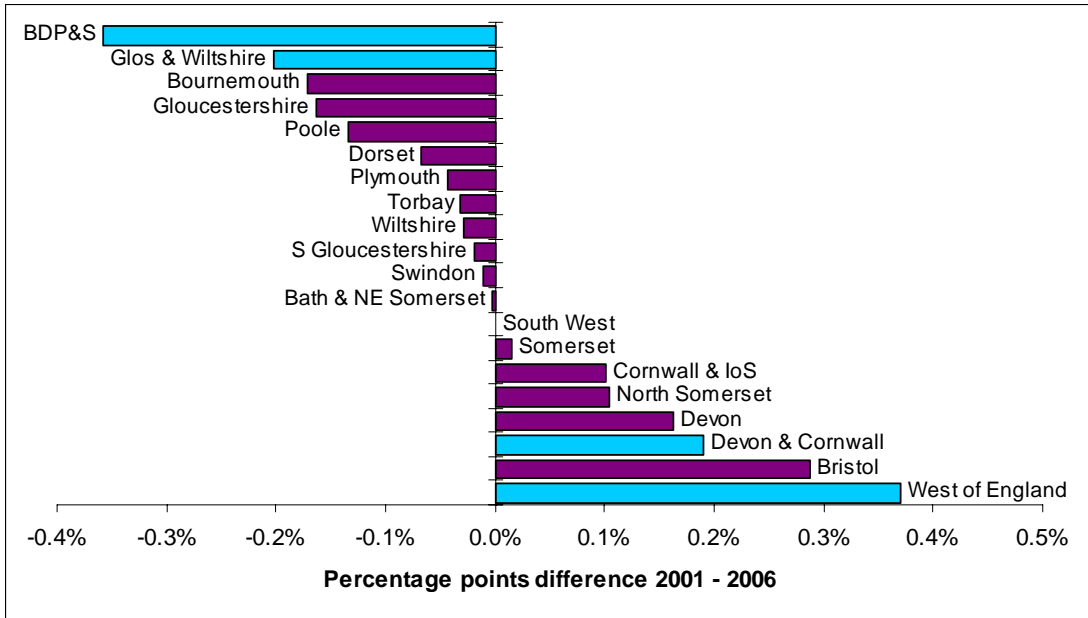


Source: Census 2001 and ONS Population Estimates 2006

- > Between 2001 and 2006 South Gloucestershire experienced a 12.3% increase in the number of people at retirement age or above. No other local authority or LSC area experienced increases greater than 10%.
- > West of England showed the lowest increase of the LSC areas at 4.8% and Gloucestershire and Wiltshire the highest at 8%.
- > The South West region recorded a 6.4% increase.
- > Bournemouth showed a decrease of almost 5% and Bristol was 1.3% down on 2001 in 2006.



**Figure 9: Percentage points difference between total population as proportion of South West total 2001 and 2006**



Source: Census 2001 and ONS Population Estimates 2006

> There were minimal differences between 2001 and 2006 in the populations of local authorities or LSC areas as proportions of the South West total. No area recorded an increase or decrease of greater than 0.4 percentage points.

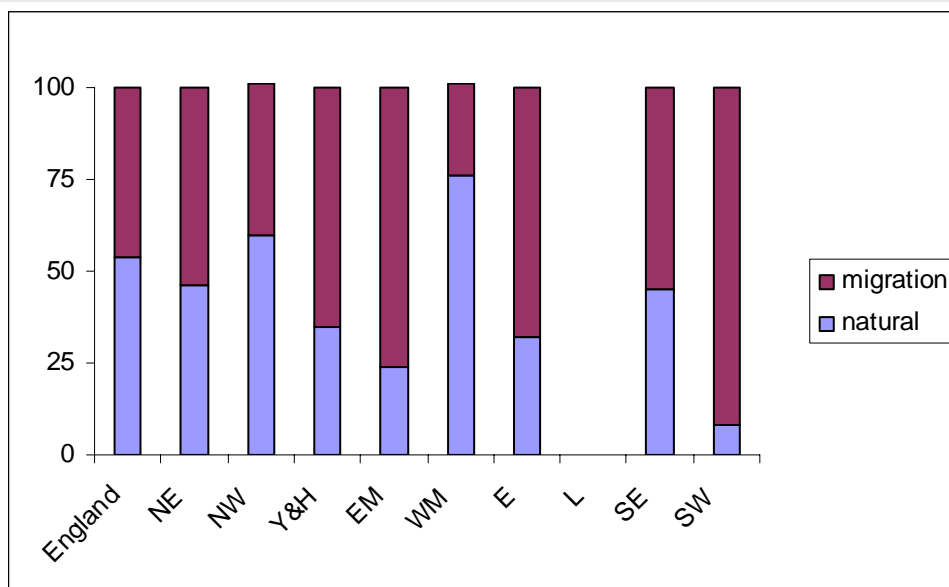
- > This pattern is repeated when looking at the region's 16-19 year olds and the working and retirement age populations, the largest difference in any category being 0.88 percentage points.

### Components of population change

Change in population is driven by either natural change [a difference between the number of births & deaths] in a given area during a given period of time or by migration [a difference between the number of people moving into and out of an area to live].

For England as a whole, and most of its constituent parts<sup>6</sup>, these two drivers are roughly equal in size. The South West is clearly different from other regions, with almost nine tenths of population growth being driven by migration.

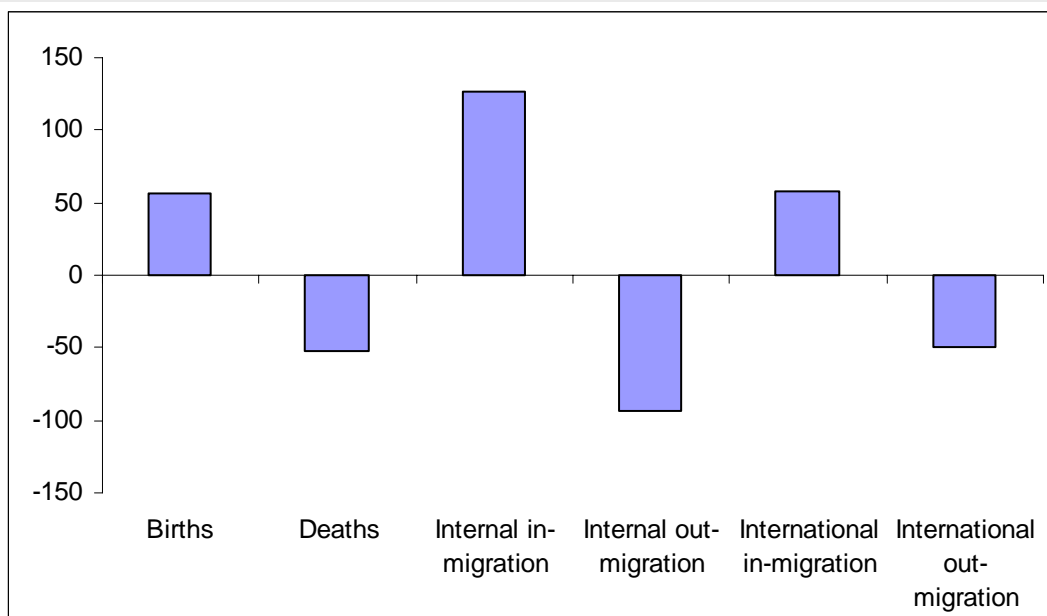
**Figure 10: Components of population change, 2007-2008, %**



Source: *Natural change and migration summaries for local authorities & higher administrative areas, Office for National Statistics, 2008*

<sup>6</sup> London's status as a global centre for many industries and activities gives it particular population characteristics which mean it is appropriate to exclude it from this analysis].

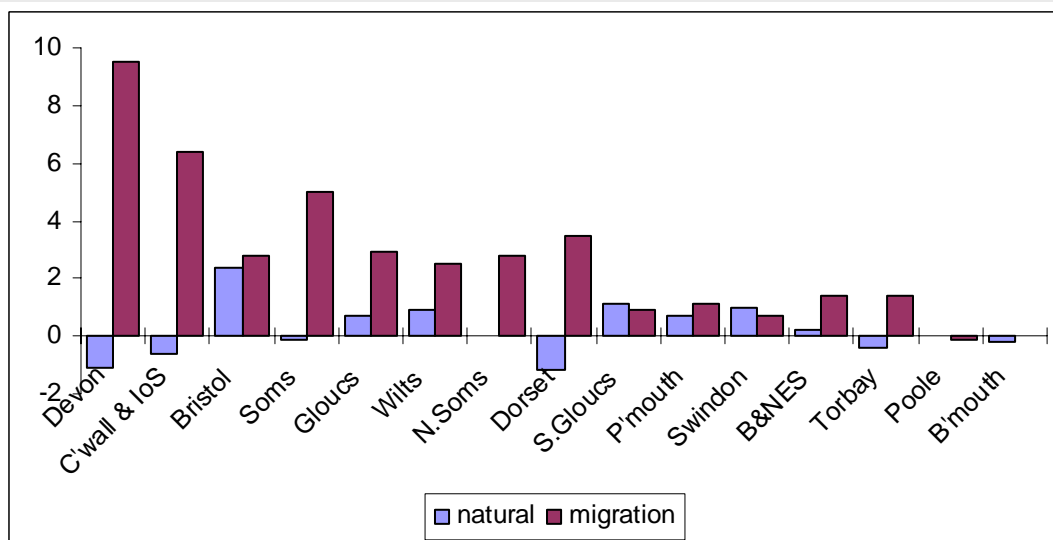
**Figure 11: Components of population change, 000s, 2007-08, SW Region**



Source: *Natural change and migration summaries for local authorities & higher administrative areas, Office for National Statistics, 2008*

Around two thirds of in-migration [c. 125,000] to the SW is from other parts of the UK. The remainder [c. 60,000] is from other nations. Natural population increase is much smaller, accounting for an increase of around 4,000 per year.

**Figure 12: Components of population change, 2007/08, 000s**



Source: *Natural change and migration summaries for local authorities & higher administrative areas, Office for National Statistics, 2008*

> Further sub-division of the South West shows clear spatial patterns. The two areas with the greatest net growth [Devon and Cornwall & IoS] both had very large numbers of in-migrants, with small surpluses of deaths over births. This pattern was also seen, albeit to a lesser extent, in Somerset, Dorset and Torbay.

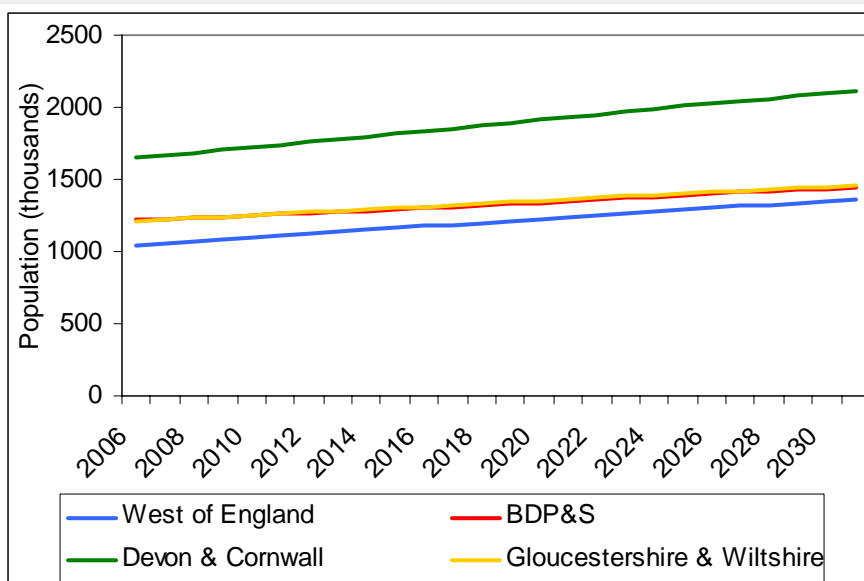
- > Bristol is unusual in that its natural population growth almost matches its migration growth.
- > Swindon and South Gloucestershire are the only areas in which natural change outstripped migrational change.
- > Bournemouth & Poole experienced net decline in their populations

As SW population increase is being driven by migration, the learning & skills needs of migrants and the target-relevant qualifications that they bring with them should be considered when planning learning & skills provision.

It is likely that internal migrants will feature relatively large proportions of well-qualified individuals, and that these individuals will have relatively few learning & skills needs, whereas the qualifications held by international immigrants are relatively unlikely to fit into the National Qualifications Framework and their learning needs, especially ESOL, will be greater.

## Population Projections

**Figure 13: Population projections – total population in SW LSC areas**

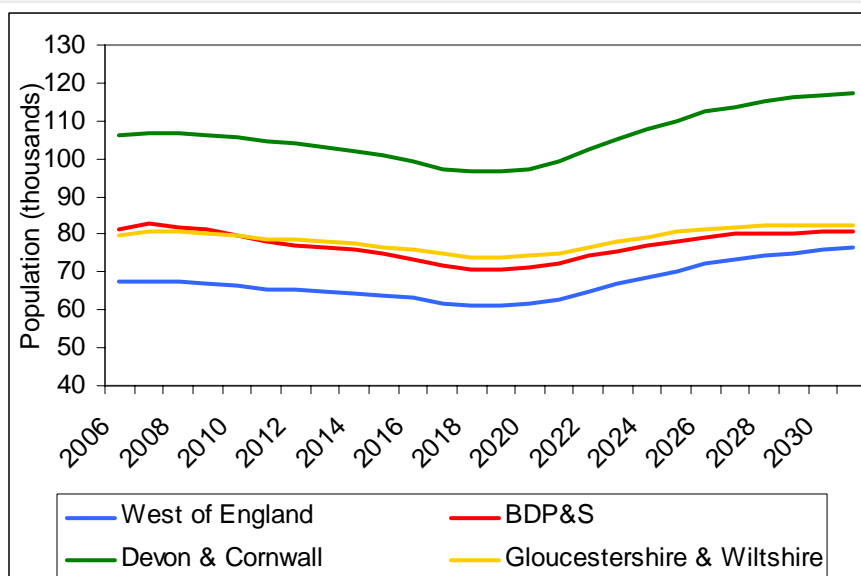


*Source: Office for National Statistics – 2006 based sub-national population projections*

- > Steady increases in the total populations of each of the South West’s LSC areas are projected.
- > Gloucestershire & Wiltshire and Bournemouth, Dorset, Poole & Somerset are expected to grow at a rate of approximately 10,000 each year.
- > The West of England is predicted to gain approximately 13,000 people each year.
- > The population of Devon & Cornwall is forecast to increase at a faster rate than each of the other areas, at approximately 19,000 people each year.
- > This pattern of steady growth is repeated across each of the local authorities in the region, although as with the example of Devon & Cornwall above, some

authorities are predicted to gain at a faster rate than others. As a general rule of thumb when looking at population projections for the total population of an area, the larger the initial population, the greater its rate of population increase.

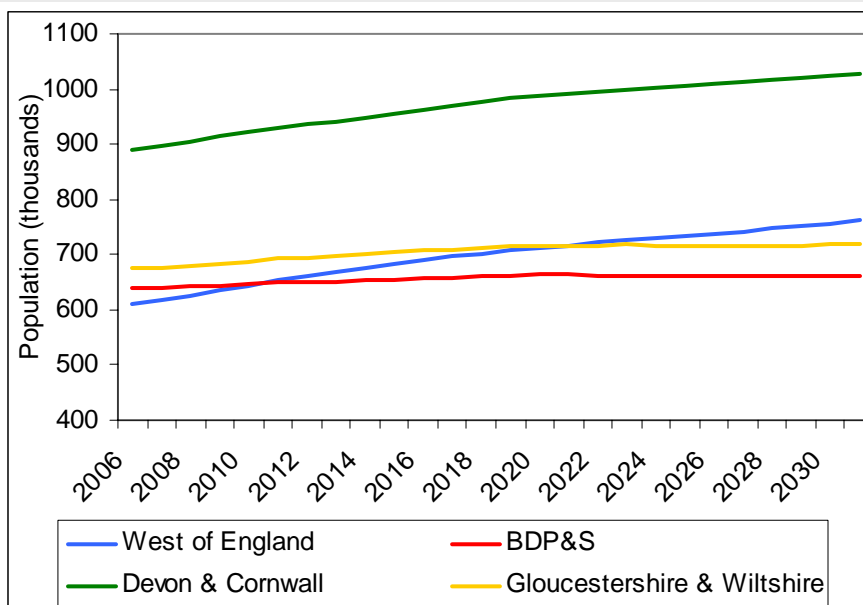
**Figure 14: Population projections – 15-19 year olds in SW LSC areas**



Source: Office for National Statistics – 2006 based sub-national population projections

- > The population projection patterns for the LSC areas of the South West region are broadly similar, with reductions in the number of 15-19 year olds occurring until about 2020, at which point the numbers start to increase, reaching levels by 2031 that are the same or higher than in 2006.
- > This pattern is repeated across the region's local authorities, with only Bournemouth and Poole projecting fewer 15-19 year olds in 2031 than in 2005.
- > Bournemouth, Dorset & Poole is set to experience a decrease in population of an average of over 1,000 15-19 year olds each year until 2019. Upon beginning to increase again, an average of over 800 more 15-19 year olds is forecast year on year until 2031.
- > In Gloucestershire & Wiltshire it is predicted that, on average, there will be over 600 fewer 15-19 year olds each year until 2018. Between 2019 and 2031, increases of an average of 700 15-19 year olds per year are forecast.
- > In the West of England there are expected to be over 500 fewer 15-19 year olds each year on average until 2019. When the numbers begin to increase again in 2020, on average nearly 1,300 extra 15-19 year olds each year are predicted until 2031.
- > Devon & Cornwall is set to experience decreases in its 15-19 population of approximately 760 people on average each year until 2019. Between 2019 and 2031, increases of an average 1,750 15-19 year olds each year are predicted.

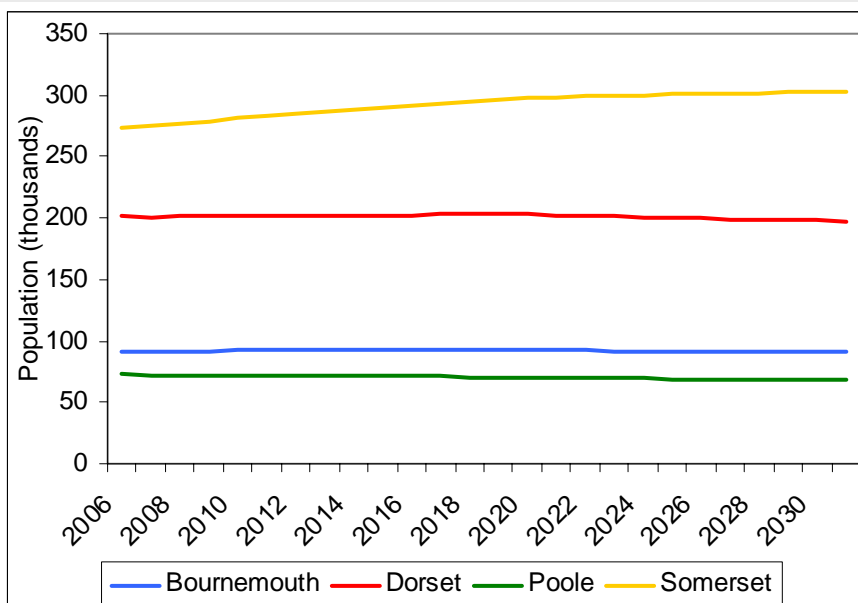
**Figure 15: Population projections – working age in SW LSC areas**



Source: Office for National Statistics – 2006 based sub-national population projections

- > The working age population projections show increases in the working age population of each of the South West's LSC areas, however the rate of increase is slowing.
- > The West of England and Devon & Cornwall show increases at a greater rate than the other two areas, with the West of England recording the least working age people in 2006 but predicting the second most by 2031.
- > This pattern of slowing rates of increase is common to all of the region's local authorities.
- > The West of England is forecast to gain, on average, approximately 7,400 working age people each year until 2020.
- > Devon & Cornwall is set to experience average yearly increases of close to 7,000 working age people each year until 2020.
- > Between 2006 and 2020, Bournemouth, Dorset, Poole & Somerset is predicted an average yearly increase of close to 1,700 working age people per year.
- > The equivalent figure for Gloucestershire and Wiltshire is close to 3,000 people.

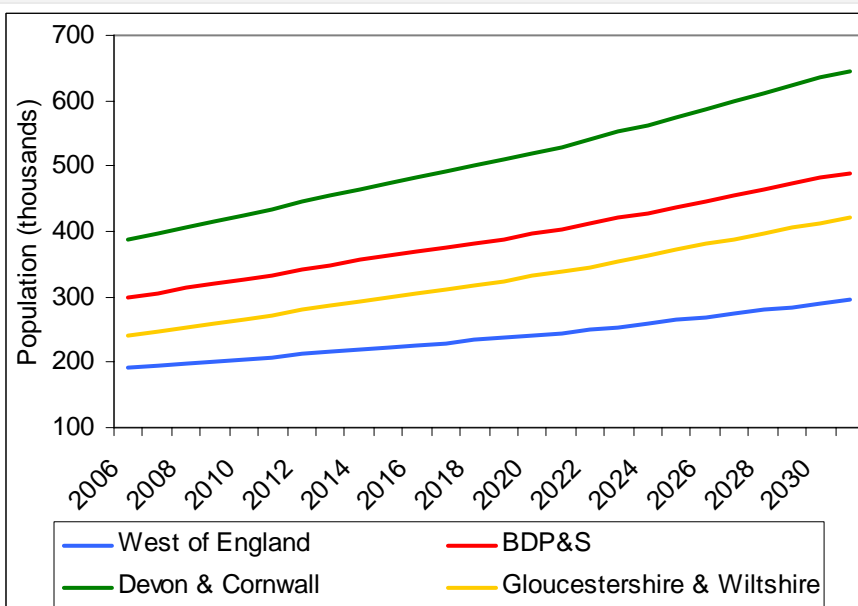
**Figure 16: Population projections – working age in BDP&S local authorities**



Source: Office for National Statistics – 2006 based sub-national population projections

- > Some local authority areas are set to experience slowing rates of working age population increase turning into decreases as in Dorset, Bournemouth and Poole.

**Figure 17: Population projections – retirement age in SW LSC areas**

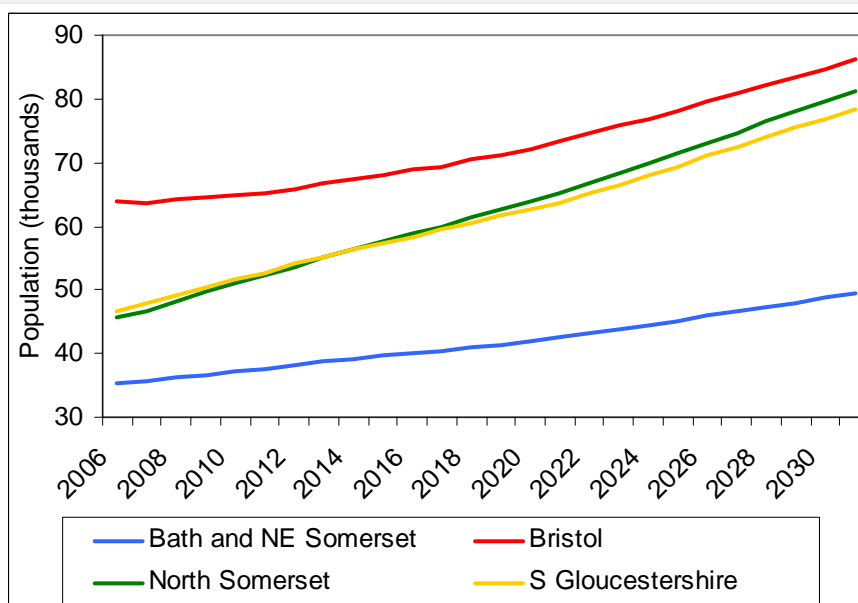


Source: Office for National Statistics – 2006 based sub-national population projections

- > The retirement age populations of the LSC areas in the South West are projected to increase with the rate of increase gradually becoming greater over time. This is also the case for every local authority in the region.
- > Devon & Cornwall has and is projected to have the greatest number of retired people with some 650,000 predicted by 2031.

- > As with the total population projections, a general rule of thumb which can be applied to most of the local authorities in the South West is that the larger initial population, the faster the rate of increase. The notable exception to this rule is as below.
- > Between 2006 and 2020, the approximate average yearly increases in the retirement age populations of the South West's LSC areas are as follows:
  - Devon & Cornwall – 9,500
  - Bournemouth, Dorset, Poole & Somerset – 6,900
  - Gloucestershire & Wiltshire – 6,400
  - West of England – 3,500

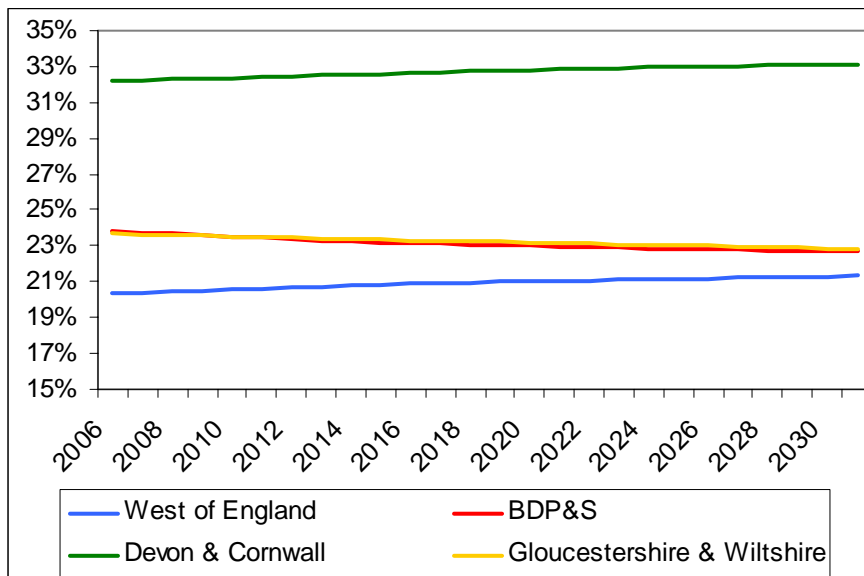
**Figure 18: Population projections – retirement age in the West of England**



Source: Office for National Statistics – 2006 based sub-national population projections

- > Bristol's retirement age population is projected to initially grow at a slower rate than both North Somerset and South Gloucestershire, reaching a similar rate of increase in around 2030. The result of this is a narrowing of the gap in retirement age populations between the three authorities.

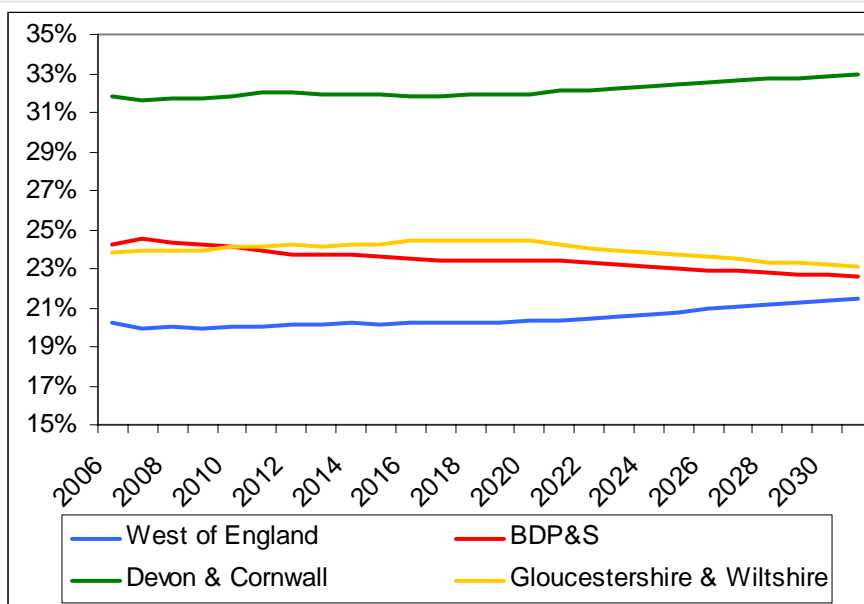
**Figure 19: Population projections – LSC area total population as a proportion of SW total population**



Source: Office for National Statistics – 2006 based sub-national population projections

- > Devon & Cornwall has the greatest proportion of the South West total population and this is forecast to increase from 32.2% in 2006 to 33.2% by 2031.
- > The West of England is also forecast to increase its share of the region's population, from 20.3% in 2006 to 21.3% in 2031 although this is still short of the other two LSC areas, which are predicted to experience decreases in proportions of approximately one percentage point over the same period leaving the areas in 2031 with a share of 22.7% (Bournemouth, Dorset, Poole & Somerset) and 22.8% (Gloucestershire & Wiltshire).

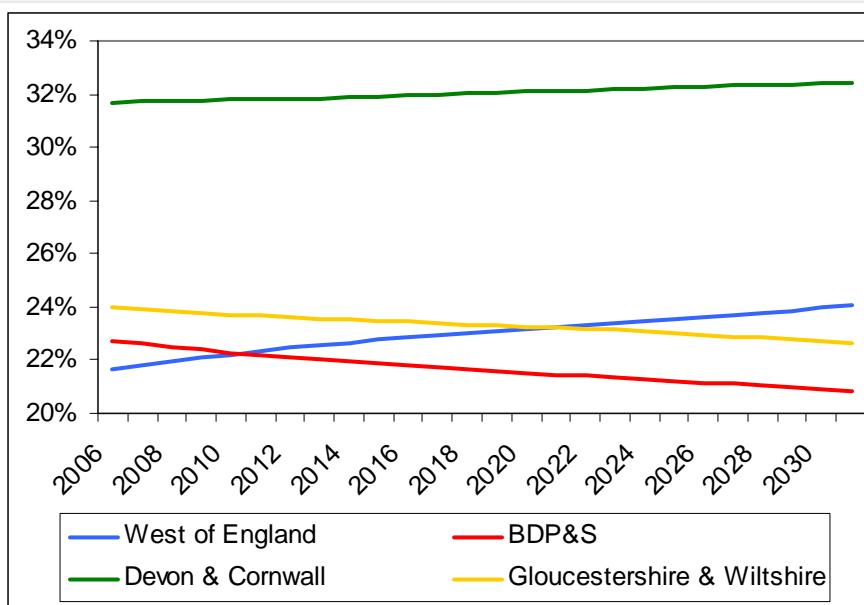
**Figure 20: Population projections – LSC area 15-19 year olds as a proportion of SW 15-19 year olds**



Source: Office for National Statistics – 2006 based sub-national population projections

- > Devon & Cornwall has the greatest proportion of the South West total of 15-19 year olds and this is forecast to increase from 31.8% in 2006 to 32.9% by 2031.
- > The West of England is also forecast to increase its share of 15-19 year olds, from 20.2% in 2006 to 21.4% in 2031 although this is still short of the other two LSC areas, which are predicted to experience decreases in proportions of 1.6 (Bournemouth, Dorset, Poole & Somerset) and 0.7 (Gloucestershire & Wiltshire) percentage points over the same period.
- > This pattern is very similar to that shown by the total population figures above.

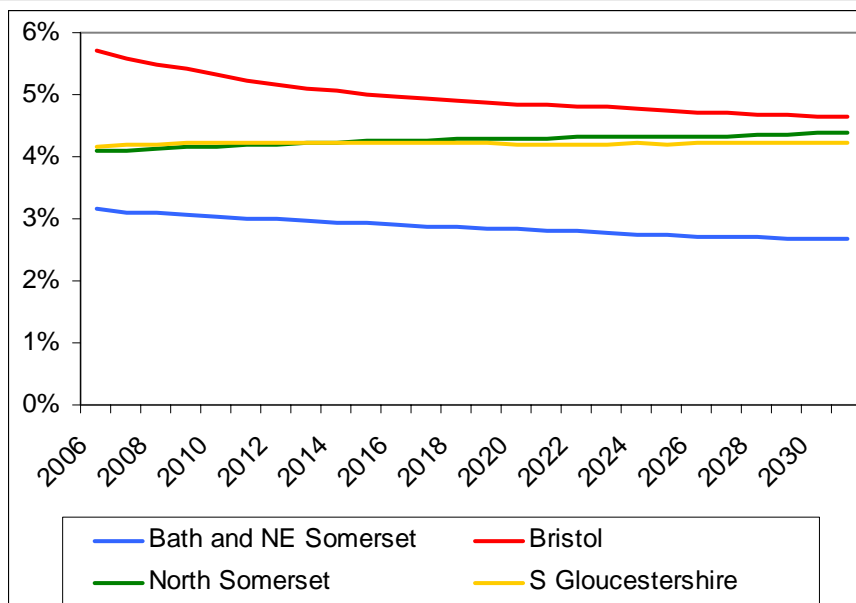
**Figure 21: Population projections – LSC area working age populations as a proportion of SW working age population**



Source: Office for National Statistics – 2006 based sub-national population projections

- > Devon & Cornwall is predicted to retain a similar and the greatest share of the working age population of the South West between 2006 and 2031, at just under a third.
- > The West of England is forecast to move from having the lowest proportion of the South West working age population in 2006 to having the second highest by 2031. This is partly due to increases in its own proportions and also reduction in the proportions of Bournemouth, Dorset, Poole & Somerset and Gloucestershire & Wiltshire.

**Figure 22: Population projections – West of England retirement age populations as a proportion of SW retirement age population**



Source: Office for National Statistics – 2006 based sub-national population projections

- > Bristol's share of the retirement age population of the South West is set to fall from 5.7% in 2006 to 4.7% in 2031, leaving the area with similar proportions to its neighbours North Somerset (4.1% in 2006, 4.4% in 2031) and South Gloucestershire (4.2% in 2006 and 2031). The initial reduction in Bristol's share is quite rapid and the city has less than 5% by 2016.
- > Bath & North East Somerset is also set to experience a drop in proportion of the South West retirement age population, from 3.1% in 2006 to 2.7% in 2031.

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