



Bridgend Replacement Local Development Plan 2018-2033



Demographic Position Statement, 2021 Census

BRIDGEND REPLACEMENT LOCAL DEVELOPMENT PLAN (LDP) 2018-2033

DEMOGRAPHIC POSITION STATEMENT, 2021 CENSUS

1. Purpose of the Report

- 1.1 The purpose of this Paper is to consider the first release of data from the 2021 Census (population and household estimates) in the context of the Replacement LDP's demographic evidence base. The first release of data provides a demographic snapshot on Census Day (21st March, 2021). Derived 2021-based projections have not yet been produced and direct comparisons with the Replacement LDP's growth projections are not yet possible. However, 'point in time' snapshot comparisons are provided within this Paper to better understand the data in the context of the Replacement LDP's Growth Strategy.

2. Background

- 2.1 A range of evidence has been considered to inform the Replacement LDP's Growth Strategy from 2018-2033. A suite of 2014-based demographic scenarios and alternatives were initially analysed in combination with more recent data from Mid-Year Estimates and a broad range of historical scenarios, with varying migration assumptions. This informed development of three growth options (Low, Mid and High) at Preferred Strategy stage, selected on the basis of being representative of identified scenarios, reasonable in relation to the evidence base and sufficiently diverse to enable different strategic planning responses. The Mid Growth Option was considered likely to perform best by supporting economic growth, enabling the delivery of key infrastructure, securing affordable housing and improving connectivity without resulting in over-development.
- 2.2 Since publication of the Preferred Strategy, Welsh Government (WG) published 2018-based population and household projections (in 2020), thereby updating the 2014-based equivalents. This provided a refreshed baseline for the Replacement LDP's demographic evidence base, which was subsequently considered alongside a range of growth scenarios, including trend-based and housing-led alternatives. This later analysis re-justified the Mid Growth Option as most appropriate to underpin the Replacement LDP (refer to the Strategic Growth Options Background Paper).
- 2.3 The Replacement LDP's proposed level of growth (7,575 dwellings) is derived from a POPGROUP Scenario that uses an ONS 2019 Mid-Year Estimate base year and calibrates its migration assumptions from a 6-year historical period (2013/14–2018/19). This period witnessed sustainable population growth, in part linked to the number of dwelling completions across the County Borough, which the Replacement LDP seeks to continue. Maintaining this trajectory will lead to more established households (particularly around the 35-44 age group) both remaining within and moving into the County Borough, coupled with less outward migration across other

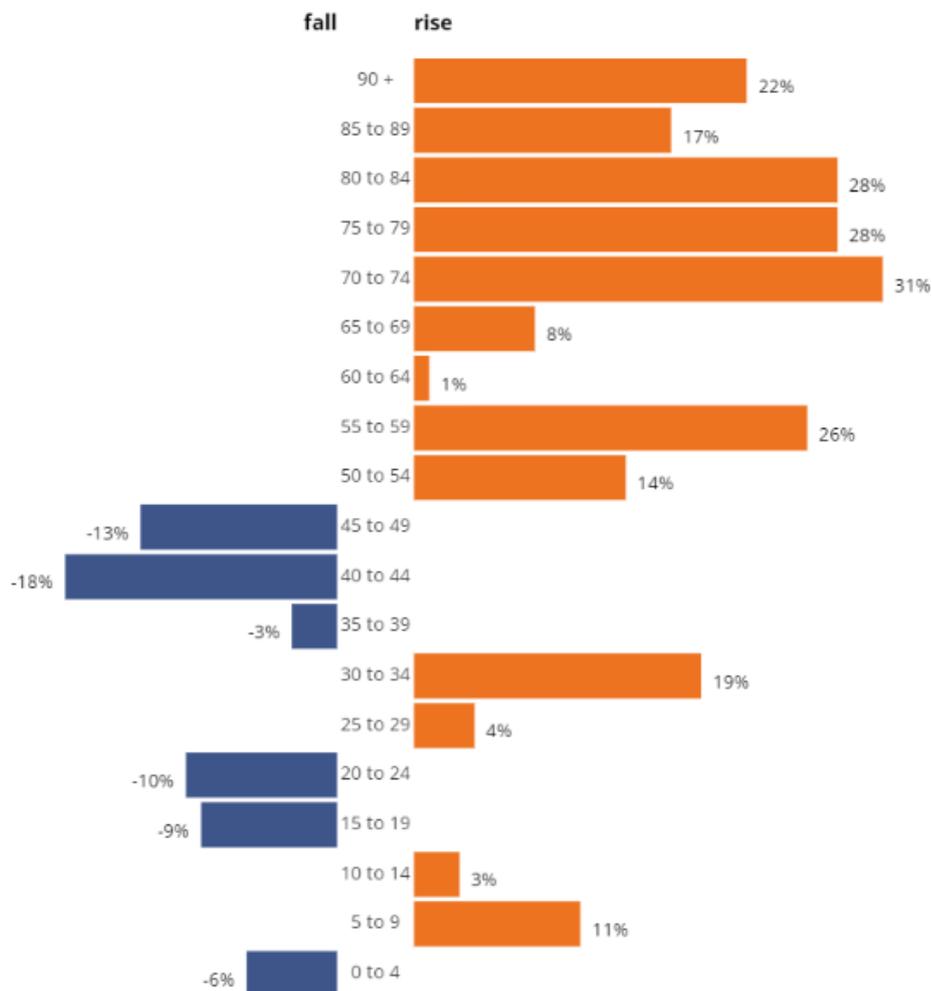
economically active age groups. This will encourage a more youthful, skilled population base to counter-balance the ageing population, resulting in an overall population increase of 9.4% or 13,681 people over the plan period.

3. Latest Position

3.1 On 28th June 2022, the first data from the 2021 Census for England and Wales was released to the public. This first release of data estimated that Bridgend County Borough’s population size increased by 4.5%, from around 139,200 in 2011 to 145,500 in 2021. In relative terms, Bridgend’s population growth was the third highest in Wales after Newport (9.5%) and Cardiff (4.7%), also exceeding the Welsh average as a whole (1.4%). In 2021, Bridgend ranked eighth for total population out of 22 local authority areas in Wales, moving up one place in a decade.

3.2 The age groups driving this population change are also important to consider. There has been an increase of 21.5% in people aged 65 years and over, an increase of 0.5% in people aged 15 to 64 years, and an increase of 2.6% in children aged under 15 years. Figure 1 provides further detail in this respect by depicting the change graphically across five-year age bands.

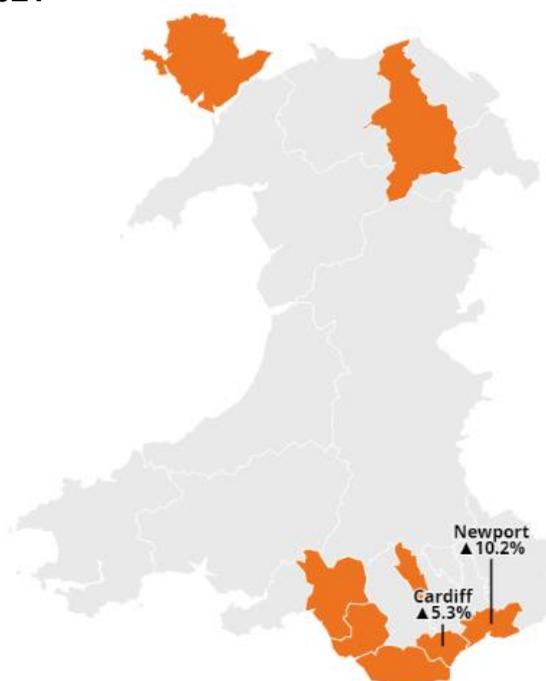
Figure 1: Population Change (%) by Age Group in Bridgend, 2011 to 2021



Source: Office for National Statistics – Census 2021

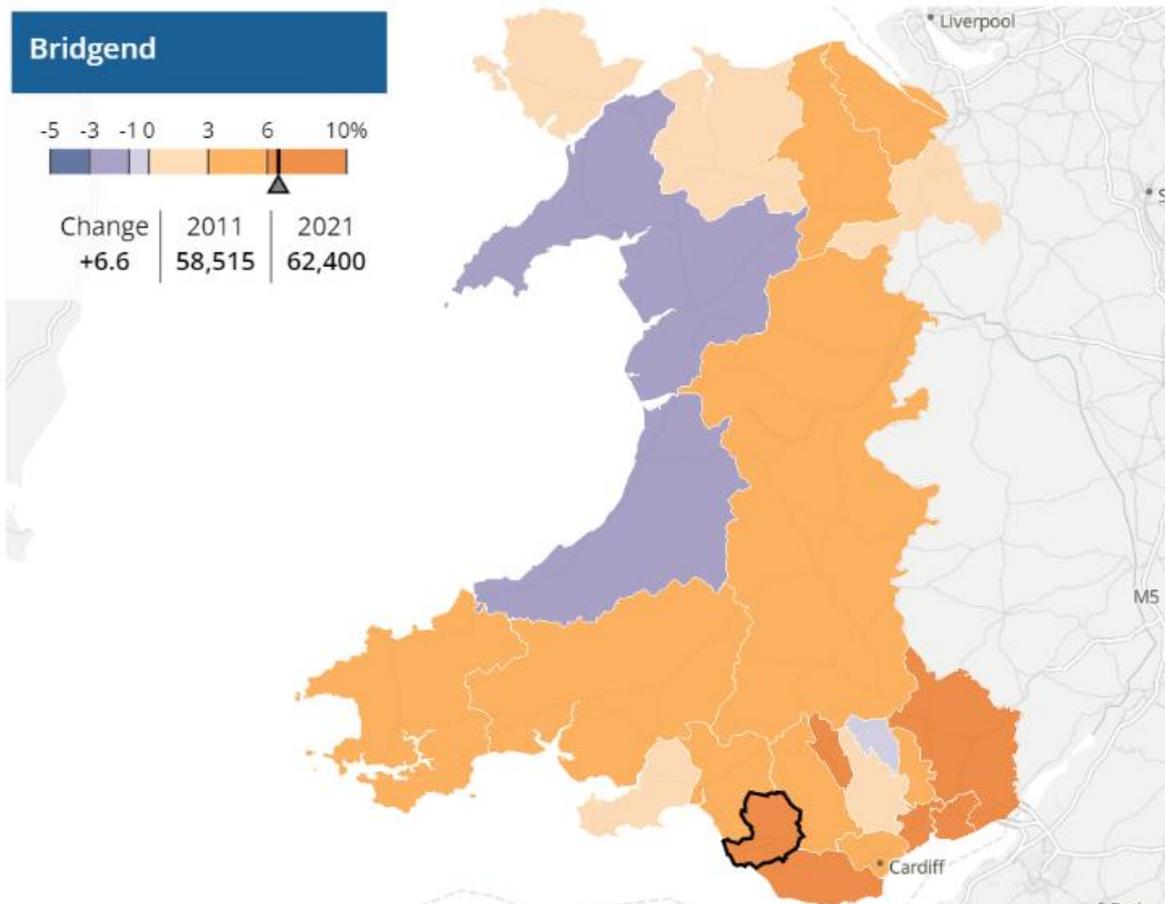
- 3.3 The growth in the 65+ age bands is highly apparent within Figure 1. In fact, Bridgend was one of only eight local authority areas where the total number of people aged 65 years and over increased by 20.0% or more between 2011 and 2021. This compares with a 17.7% increase across Wales as a whole. Figure 1 also shows a large change (+26%) in people moving into the 55-59 age group, who will in turn likely progress to retirement age during the Replacement LDP period (i.e. by 2033).
- 3.4 Figure 1 also shows a negative change in age groups 15 to 19 (-9%) and 20 to 24 (-10%), which can primarily be attributed to school leavers moving onto higher education elsewhere. More notable is the negative change in age groups 35 to 39 (-3%), 40 to 44 (-18%) and 45 to 49 (-13%) as this indicates a net number of established, working age households left the County Borough between 2011 and 2021. There were 30,225 people aged 35 to 49 in the County Borough in 2011 compared to an estimated 26,800 in 2021. The Replacement LDP's evidence base already identified this latter trend and the growth strategy seeks to reverse this by attracting and retaining established, economically active households within the County Borough.
- 3.5 Indeed, Bridgend County Borough is one of only eight local authority areas in Wales that saw an increase in those aged under 15 years between Census counts (illustrated in Figure 2). The population aged under 15 years increased most in Newport, rising by 10.2%, compared with an increase of 5.3% in Cardiff. Bridgend's growth in those aged under 15 was equally notable at 2.6%. In absolute terms, this means 16.7% of the County Borough's population was under 15 at the time of the 2021 Census (24,300 people). It remains important for the Replacement LDP's growth strategy to maintain this youthful population in future years of the Plan as a catalyst for economic growth and prosperity.

Figure 2: Local Authorities That Have Seen an Increase in Those Aged Under 15 Years, 2011 to 2021



3.6 The first release of Census 2021 data also included a household estimate (a household being defined as having at least one usual resident). The number of households across Wales increased from 1,302,676 in 2011 to 1,347,100 in 2021; a 3.4% increase. However, as shown in Figure 3, growth was not uniform across Wales, with three local authorities witnessing a decrease in household numbers (Gwynedd, Ceredigion and Blaenau Gwent). The local authorities that saw the highest increases were Newport (8.1% increase), the Vale of Glamorgan (7.5% increase) and Monmouthshire (7.0% increase). Bridgend also witnessed high proportionate household growth, with households increasing from 58,515 in 2011 to 62,400 in 2021; a 6.6% increase.

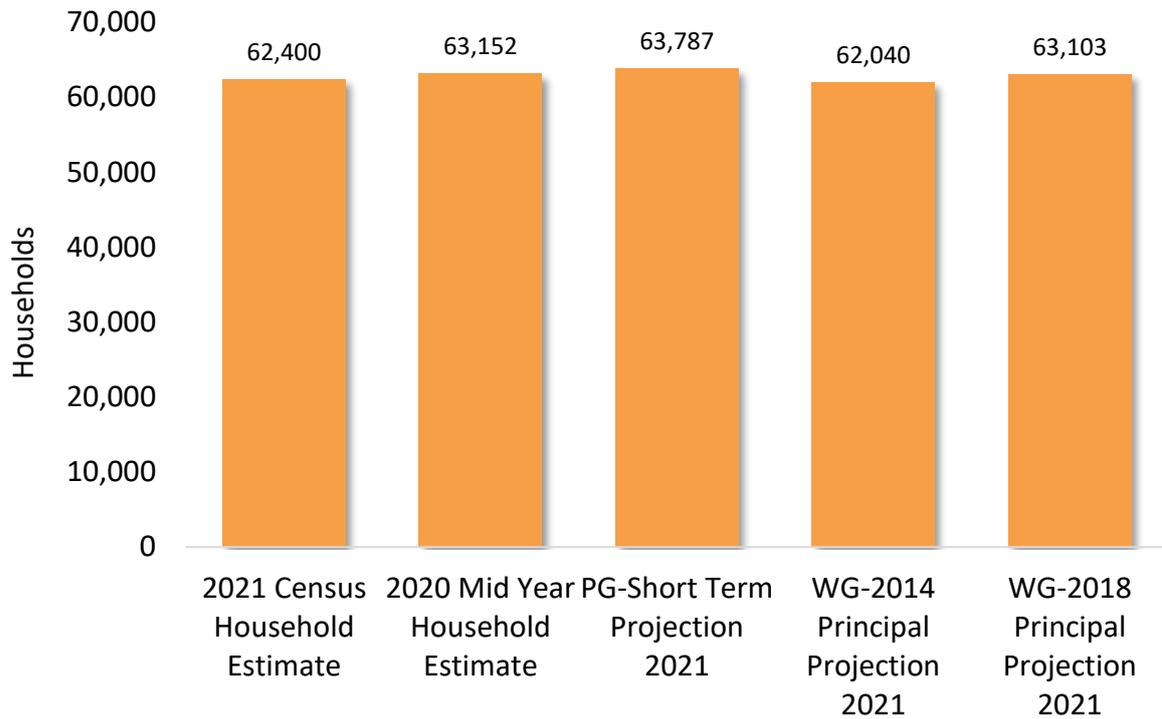
Figure 3: Changes in the Number of Households Between 2011 and 2021



Source: Office for National Statistics – Census 2021

3.7 Figure 4 contextualises this data by comparing the number of households captured by the 2021 Census to the latest (2020) Mid-Year Household Estimate. It also compares the number of households projected in 2021 by the PG-Short Term Projection (used to underpin the Replacement LDP) and the two WG principal projections (2014 and 2018-based).

Figure 4: Estimated Number of Households, Bridgend County Borough



3.8 The latest output from the 2021 Census demonstrates 752 fewer households than anticipated by the 2020 Mid-Year Estimate (NB. a 2021 Mid-Year Estimate has not been published due to the Census, although would have undoubtedly been higher than the 2020 estimate). The WG 2014-based principal projection was actually closest to the 2021 Census output, although projected 360 fewer households in 2021. Conversely, the WG 2018-based principal projection (+703 households) and the PG-Short Term projection (+1,387 households) estimated that there would be more households in 2021 than captured by the Census. However, these findings are not unexpected as the 2021 Census was undertaken during a period of lasting and evolving pandemic related restrictions. Households may have temporarily combined for care reasons, prospective newly forming households may have remained in the parental home for longer, financial uncertainties may have affected mortgage access and housing supply decelerated due to building sites temporarily closing. This range of factors has undoubtedly impacted upon new household formation rates and demographic trends. While 2021-based projections have not yet been produced, forecasting such pandemic-related trends forward would inevitably result in lower household projections than previously estimated. Basing the Replacement LDP on such trends would be far less likely to enable delivery of the LDP’s Key Issues, Aims, Vision and Objectives.

4. Conclusion

- 4.1 This paper has considered the first release of data from the 2021 Census (population and household estimates) in the context of the Replacement LDP's demographic evidence base.
- 4.2 While the first release of data from the 2021 Census suggests fewer households resided in the County Borough than anticipated by previous Mid-Year Estimates and varying projections, this Census was undertaken during a lasting period of pandemic-related restrictions. The resultant demographic snapshot captured by the Census has therefore been impacted by negative, pandemic-laden trends. Such trends are likely to be inappropriate to project forward over the life of the Replacement LDP in a manner that will deliver the Vision, Aims and Objectives.
- 4.3 Most notably, there was an increase of 21.5% in people aged 65 years and over between 2011 and 2021, coupled with an 11% reduction in people aged 35 to 49 over the same period. Continuation of these trends over the Replacement LDP period would likely lead to significant out-migration amongst economically active households and an increasingly ageing population residing locally. This could impair the County Borough's ability to attract and retain employers. Many of the key issues and drivers of the Replacement LDP seek to secure sustainable economic growth, diversify the employment sector and attract inward investment across the County Borough. This is considered vital to both secure socio-economic benefits from and contribute towards the success of the Cardiff Capital Region and Swansea Bay Region. While 2021-based projections are yet to be released, the pandemic-laden snapshot captured by the 2021 Census suggests any resultant projections would be fettered by this negative socio-economic outlook.
- 4.4 Conversely, the PG-Short Term Variant, which underpins the Replacement LDP Growth Strategy, was previously updated following release of the 2018-based projections. It uses an ONS 2019 Mid-Year-Estimate base year and calibrates its migration assumptions from a 6-year historical period (2013/14–2018/19), an approach consistent with ONS methods. This period captures the more positive socio-economic and demographic trends post the Great Recession, while pre-dating the negative impacts caused by the pandemic. This period is still considered appropriate to project forward over the life of the Replacement LDP as it represents a period of positive, sustainable, economic growth that best aligns with the Vision, Aims and Objectives of the Plan.
- 4.5 The first release of data from the 2021 Census is therefore noted, although does not justify any departure from the extant Replacement LDP Growth Strategy. The rationale for the Growth Strategy is therefore still considered wholly appropriate for the reasons already outlined in the Strategic Growth Options Background Paper.