

The future population of Herefordshire

Version 0.1

Herefordshire Council Intelligence Unit

June 2019

CONTENTS

Contents.....	2
Main points.....	3
2. Introduction	4
1.1. Background.....	4
1.2. Uses & limitations	4
1.3. Methodology	5
2. Results.....	7
2.1. County-level.....	7
2.2. Around the county.....	9
Further information.....	11
Appendix.....	12

If you need help to understand this document, or would like it in another format or language, please contact us on 01432 261944 or e-mail researchteam@herefordshire.gov.uk

MAIN POINTS

- On the assumption that 18,000 new homes will be built between 2016 and 2031¹, the population of Herefordshire is expected to increase by 17%, from 189,500 to 221,000 people over this 15-year period. This is compared to a growth of 6% should recently observed trends in births, deaths and migration continue in the absence of any future housing development.
- Herefordshire has an ageing population; in the absence of any housing development, the numbers of children would be expected to remain relatively static, the working age population is predicted to decrease slightly, and the numbers of people aged 65 and over would increase. Assuming that housing growth targets¹ will be met, all age groups are forecast to increase; however, the county will still have a similarly ageing profile.
- Levels of population change will vary across the county and are closely related to the level of house building activity in an area relative to the size of the population within that area. The Hereford rural locality² will yield the largest growth, both in terms of numbers of new dwellings and relative change in the population (+42%). Leominster town and Ledbury town are also expected to see relatively large increases in the population (+33% & +24% respectively).

¹ According to annual housing growth targets from [Herefordshire's Local Plan Core Strategy](#).

² Estimates of future population have been provided for 16 sub-county localities - see the [Appendix](#) for a definition of sub-locality and an accompanying map.

2. INTRODUCTION

1.1. BACKGROUND

Herefordshire Council commissioned [Edge Analytics](#) to develop estimates of the future population of Herefordshire and for areas around the county. This document presents the findings from two scenarios of how the future population of the county might develop - (i) a population projection which assumes that recent trends in births, deaths and migration will continue over the projection period and (ii) a housing development-led scenario that considers the impact of planned house-building on the population. *The former is referred to as a projection and the latter as a forecast throughout this document.*

1.2. USES & LIMITATIONS

The methodology used to derive these population projections is consistent with the official [2016 sub-national population projections](#) produced by the Office for National Statistics (ONS), which are a definitive set of national population projections used by local authorities across the country. They provide an insight into the potential future size and age structure of the population and can be used for informing resource allocation and planning at the local-level. However, a housing-led population forecast evaluates the impact that planned house building would have on the population and, as such, is a potentially more realistic scenario.

Neither the projections nor the housing-led forecasts consider the impact of future political or economic changes including policies adopted by both central and local government; such as, for example, the impact of the UK leaving the European Union, which will likely have an impact on migration flows.

Since population projections and forecasts are based on historical trends and incorporate assumptions about what will happen in the future, their accuracy can be expected to diminish year on year over the projection period. This is particularly the case for the sub-county areas and for detailed age and sex breakdowns.

Housing development has a strong influence on population growth, but any unforeseen deviations in the housing market could result in a significantly different rate of population

growth. However, we have a good understanding of planned housing development up to the year 2023 from the [Five year housing land supply](#). After this time there is more uncertainty around the locations and timescales of delivery.

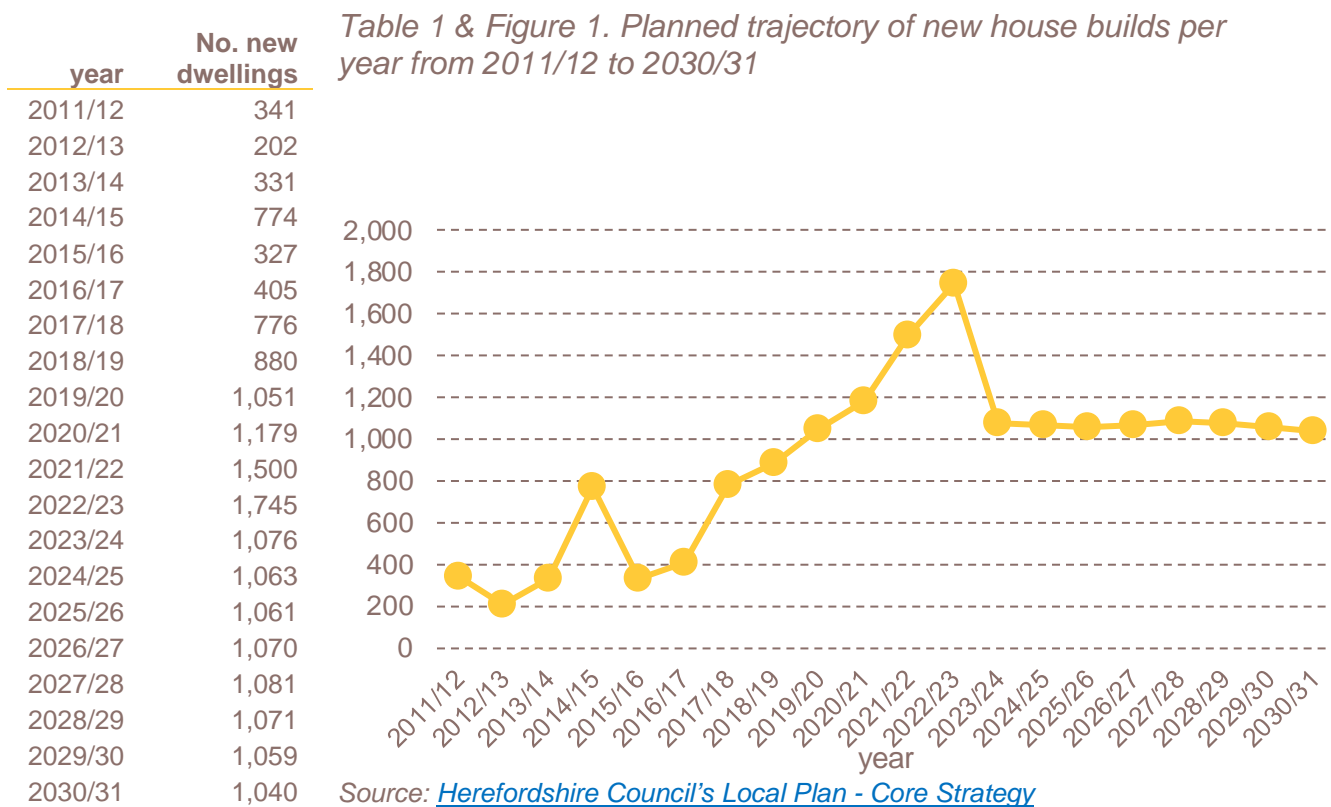
1.3. METHODOLOGY

The population *projection* for Herefordshire and its sub-areas replicates ONS' [2016 sub-national population projection](#), whereby the future population of each area is projected forward by ageing on the population and applying observed trends in relation to births, deaths and migration, year on year, up to 2041, with the county-level projection providing a constraining total for the constituent sub-area projections.

These projections serve as a baseline scenario; they do not attempt to predict the impact that future government or local policies (such as on housing development), changing economic circumstances, or other factors, might have on demographic behaviour.

The housing-led population *forecast* considers the impact of [Herefordshire's Core Strategy](#) housing growth targets on future population change. The annual change in housing growth for the county and its 16 sub-areas was applied in each year of the forecast period to 2031, with migration used to balance the relationship between population change and planned housing growth. If there is insufficient population to fill the housing growth, more in-migrants and fewer out-migrants are needed.

The core strategy target over the 20 years from 2011/12 is for 16,500 dwellings, but around a further 1,500 dwellings were incorporated into the dwelling-led forecasts to incorporate other planning permissions which are granted on speculative sites, taking the total up to around 18,000 new dwellings. Planned annual house building activity in the county, over the forecast period, is shown in Table 1 and Figure 1.



Further details of the methodology behind these population projections and forecasts can be found in 'Herefordshire Sub-Locality Population & Household Forecasts Methodology'.³

³ Extract from *Edge Analytics. February 2019. Herefordshire Sub-Locality Population & Household Forecasts Methodology.*

2. RESULTS

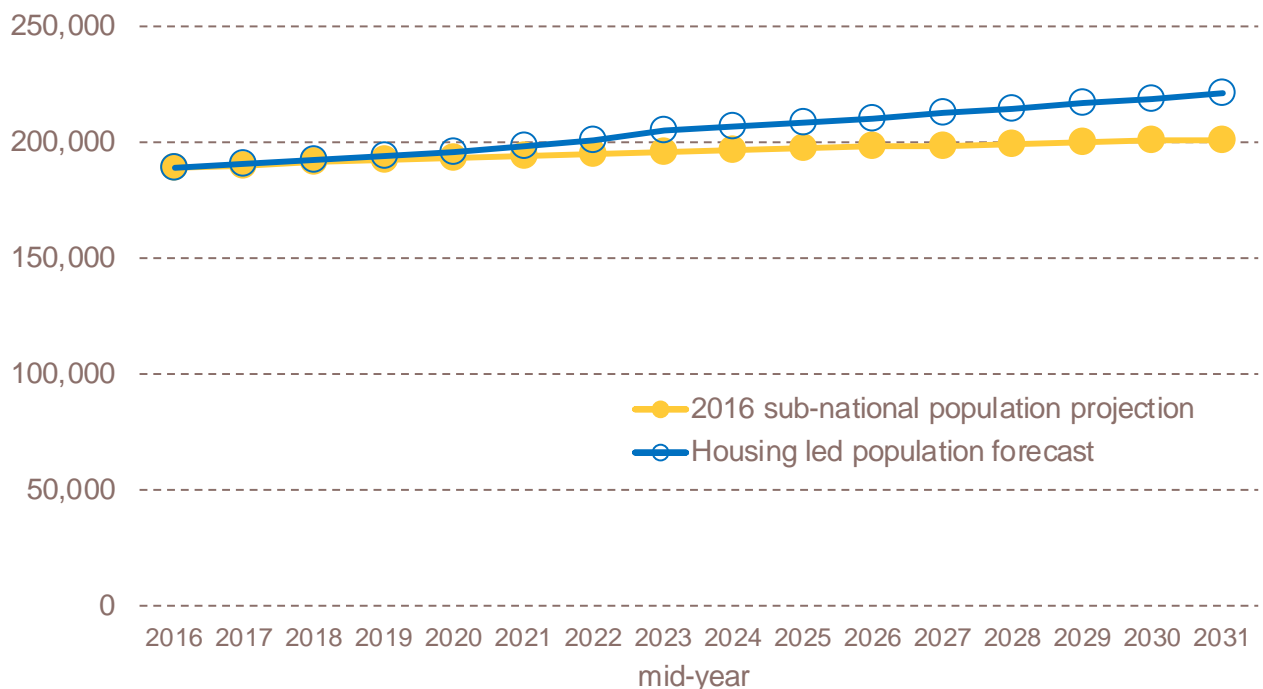
2.1. COUNTY-LEVEL

The population *projection* and *forecast* for Herefordshire are compared in Figure 2. The total population of the county is expected to grow, in both scenarios, over the next 15 years.

If recent trends in births, deaths and migration were to continue, the total population of Herefordshire is projected to increase from 189,500 people in 2016 to 201,200 by 2031 (an increase of six per cent) - this is equivalent to around 800 additional residents per year over the next 15 years.

Incorporating the impact of assumed housing development on population growth, the total population of the county is forecast to be 221,500 people by 2031 – an estimated 19,800 more people than in the absence of housing development. This is a forecast increase of 17% over the next 15 years, equivalent to around 2,100 additional residents per year.

Figure 2. Projected and forecast change in the total population of Herefordshire, 2016 to 2031

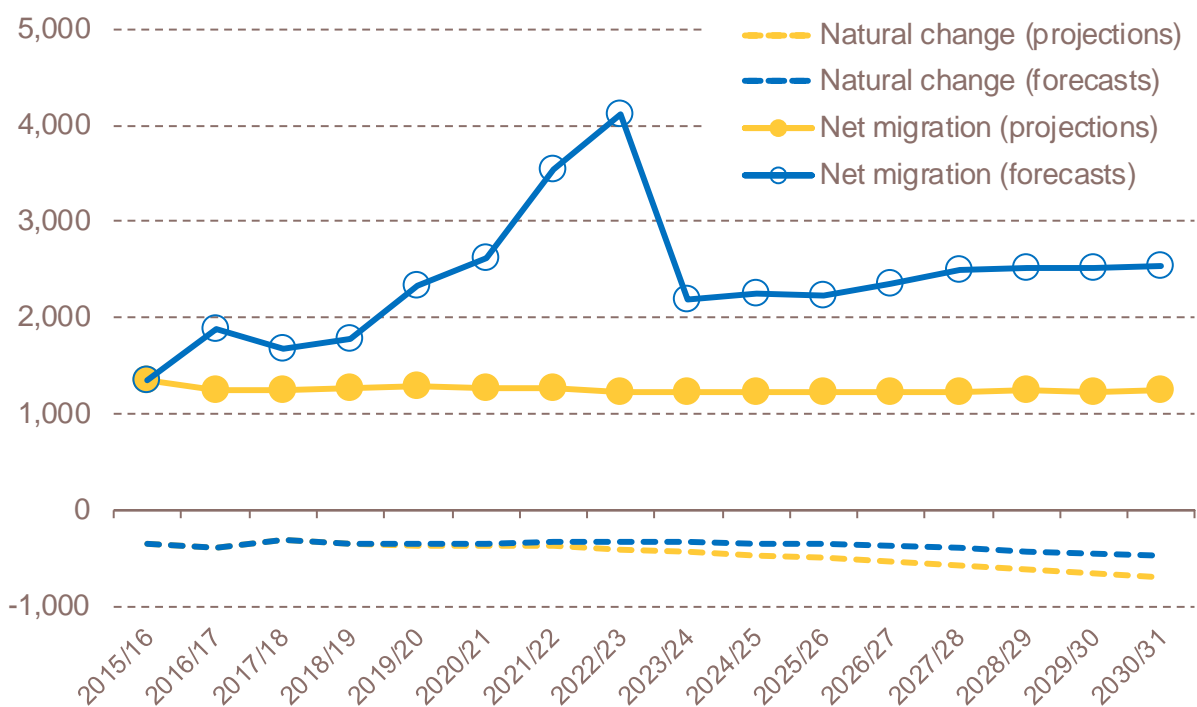


Source: Edge Analytics, February 2019

Since there are more deaths than births in Herefordshire, migration is the sole driver of population growth. Figure 3 shows how these component drivers of population growth are expected to change, according to the projection and forecast scenarios.

Figure 3. Components of population change in Herefordshire according to the population projection & forecast, 2016 to 2031

increase in levels of net inward migration to meet extra housing supply over this 15-year period

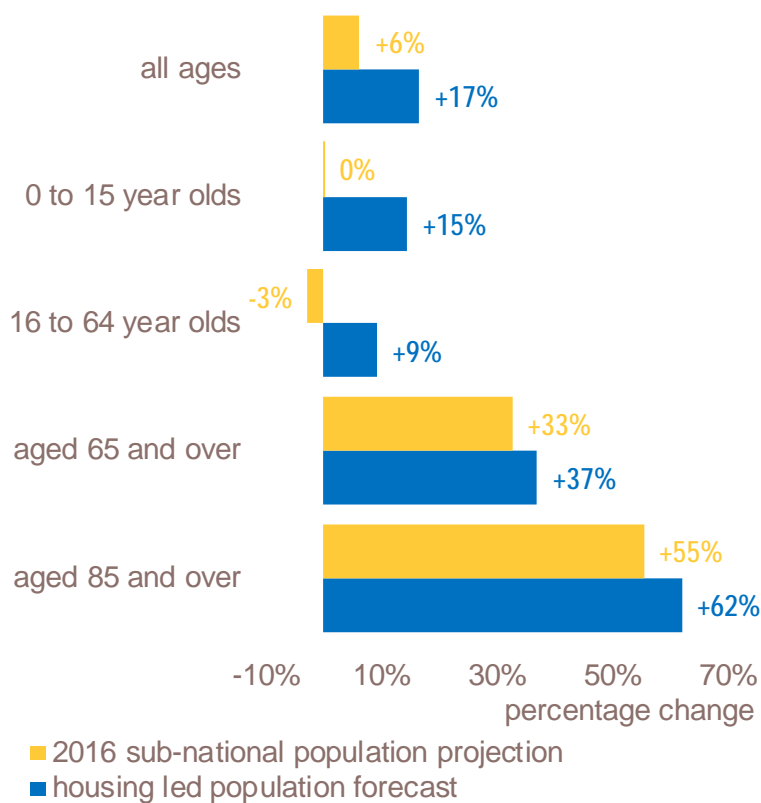


Source: Edge Analytics, February 2019

Note that natural change is the number of births minus deaths; net migration is the net flow of people into the county from elsewhere within the UK and abroad.

Although the overall population of Herefordshire is expected to increase by 6% over the next 15 years; if the recent trends in births, deaths and migration were to continue, the numbers of children are expected to remain relatively static and the working age population is predicted to decrease slightly, while the numbers of people aged 65 and over are set to increase. However, the ensuing increase in levels of net inward migration to meet extra housing supply over this 15-year period is expected to have a greater impact on the future numbers of children and working age people, with forecast increases of 15% and 9% respectively (as shown in Figure 4).

Figure 4. Projected and forecast percentage change in population by broad age group, 2016 to 2031



Source: Edge Analytics, February 2019

2.2. AROUND THE COUNTY

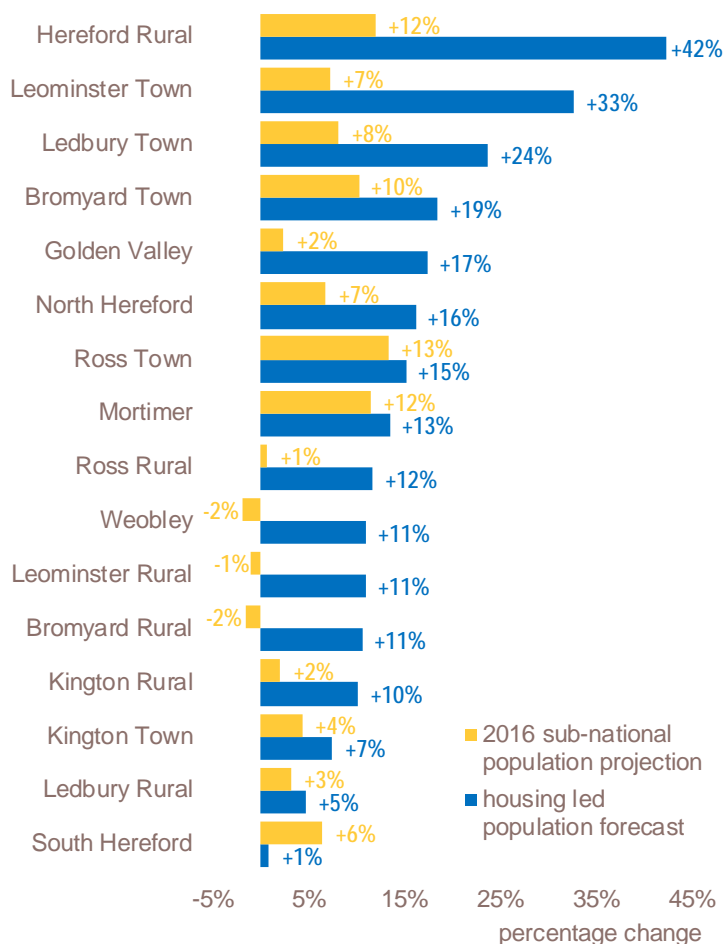
Projections and forecasts have been developed for 16 sub-county areas (defined in the [Appendix](#)). These areas are based on the five market towns of Bromyard, Kington, Ledbury, Leominster & Ross-on-Wye; North Hereford city, South Hereford city; six rural areas representing the rural surroundings of the market towns and the city, and the three individual rural areas of The Golden Valley, Mortimer and Weobley.

If recent trends in births, deaths and migration were to continue, most areas of Herefordshire are projected to increase in population over the next 15 years, as shown in Figure 5. Exceptions include the rural areas of Weobley, Leominster rural and Bromyard rural, which are expected to yield small decreases in population of just one or two per cent. The numbers of births and the net numbers of people moving into these areas

would not be sufficient to offset the numbers of deaths; furthermore, Weobley also has a net outward flow of migration, the only other area in Herefordshire to have a net outward flow of people is Hereford South.

According to the dwelling-led forecasts, the next 15 years will see an increase in population across all areas in Herefordshire as a result of housing development activity, as shown in Figure 6. Hereford rural will yield the largest growth in terms of numbers of new dwellings and relative change in the population (+42%). Leominster town and Ledbury town are also expected to see relatively large relative increases in the population (+33% & +24% respectively) on account of greater housing development activity within these areas. Conversely, lower levels of housing development in Hereford south are expected to yield little growth (+1%) over this period.

Figure 5. Projected and forecast percentage change in population by sub-county areas, 2016 to 2031



Source: Edge Analytics, February 2019

FURTHER INFORMATION

This document can be found on the [Understanding Herefordshire website](#), which serves as the evidence base for Herefordshire Council's Joint Strategic Needs Assessment (JSNA), providing information and data about Herefordshire and its people, and is maintained by the council's Intelligence Unit.

The population projections and forecasts, including an analysis toolkit, are available to download from the [Growing population](#) page of the website.

APPENDIX

Herefordshire's Localities are based on civil parish boundaries that build around secondary school catchment areas with minor adjustments on the basis of a wider range of evidence - for example community transport provision and GP registrations. They were created to aid in the design and delivery of services to different parts of the county - including the co-location of providers to make most efficient use of resources. Localities are divided into sub-localities, so that differences in character between the towns and their surrounding rural hinterlands are not lost in statements about the locality as a whole. A map of Herefordshire's sub-localities is provided below in Figure A1.

Figure A1. Herefordshire's sub-county areas



© Crown copyright and database rights (2019) Ordnance Survey (100024168)

Source: Herefordshire Council's Intelligence Unit