

1. 2010-based Population Projections – Summary of Results

ONS have released 2010-based sub-national population projections in March 2012. This appendix analyses the results of those population projections. These projections are also based on the indicative population estimates released by ONS, which use an improved method for estimating immigration into individual areas. Because of this the base population in 2010 is slightly different to the official mid-2010 estimates.

It is noted that the CLG department have yet to produce the corresponding household projections based on these projected populations, and no release date is finalised as of yet, but they are scheduled to be released in due course.

It can be seen that by 2030 South Worcestershire is projected to have a population of over 316,000, representing an increase of over 29,000 on the 2010 figure an increase of over 10%. This is very similar to the county average, but is a lower proportional increase than projected in the West Midlands region as a whole (15%), and also a smaller projected increase than the national average of almost 16%.

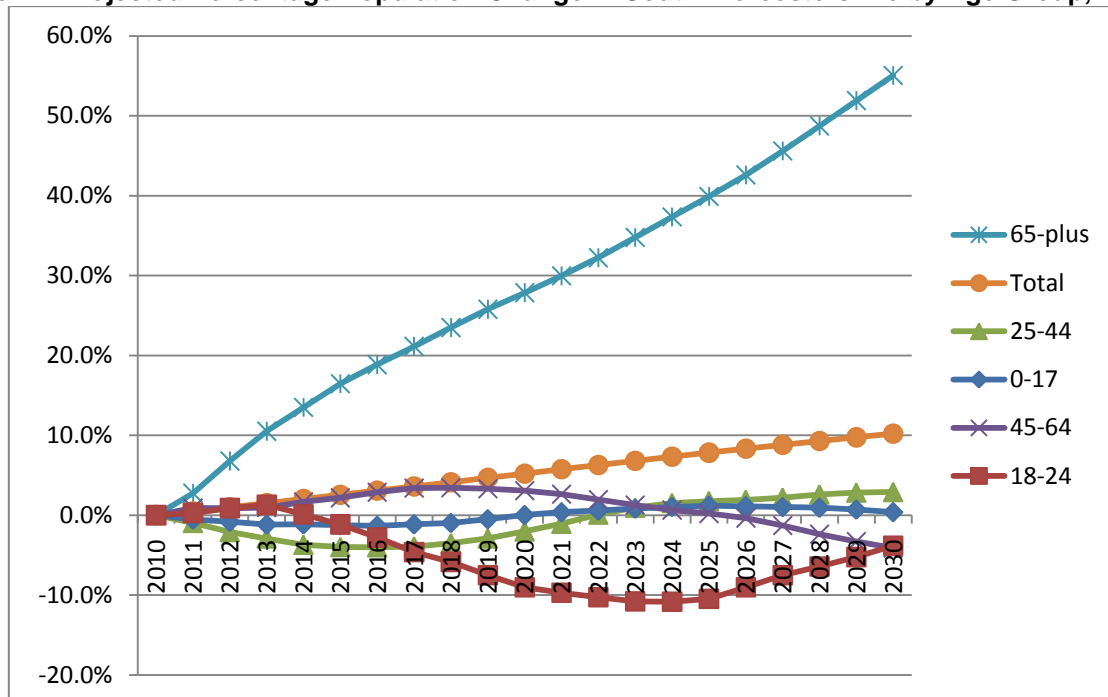
Table 1 – ONS 2010-based Population Projections, South Worcestershire Districts, 2010-30 (thousands)

Area	2010	2015	2020	2030	Change 2010-30	Percentage Change
Malvern Hills	74.6	75.5	77.1	81.0	6.4	8.6%
Worcester City	94.4	97.6	100.2	104.7	10.2	10.9%
Wychavon	117.9	121.2	124.5	130.5	12.6	10.7%
South Worcs	286.9	294.2	301.8	316.2	29.3	10.2%
Worcestershire	558.6	572.8	587.9	615.8	57.2	10.2%
West Midlands	5,479.4	5,698.2	5,914.9	6,303.9	824.5	15.0%
England	52,213.4	54,468.2	56,606.6	60,409.5	8,196.1	15.7%

Source – ONS 2010-based Population Projections

Within South Worcestershire, projected increases are relatively high at almost 11% in both Worcester City (at around 10,200) and Wychavon (at around 12,600). In contrast, Malvern Hills has a slightly lower projected increase of around 6,400 (around 8.6%).

Figure 1 – Projected Percentage Population Change in South Worcestershire by Age Group, 2010-30



Source – ONS 2010-based Population Projections

Figure 1 shows that the projected increase in population within South Worcestershire to 2030 is concentrated almost exclusively in the 65-plus age range. The number of people aged 65 and over is projected to rise by over 31,000 in the 2010-30 period. This represents growth of 55% among that age group, and also represents 107% of the total

projected population increase. In comparison, the 18-24 and 45-64 age groups are each projected to decrease by around 4%. Each of the other age ranges are projected to experience small rises.

Table 2 – ONS 2010-based Population Projections, Worcestershire Districts, 2010-30 (thousands)

Area	0-17	18-24	25-44	45-64	65-plus	Total Pop
Malvern Hills	-5.8%	-15.7%	-2.4%	-7.1%	55.8%	8.6%
Worcester City	4.7%	2.9%	8.2%	1.2%	45.5%	10.9%
Wychavon	0.7%	-5.0%	0.4%	-5.7%	60.1%	10.7%
South Worcs	0.4%	-3.8%	2.9%	-4.1%	55.1%	10.2%
Worcestershire	2.3%	-5.9%	2.2%	-4.4%	56.6%	10.2%
West Midlands	15.2%	2.2%	12.0%	2.6%	45.3%	15.0%
England	14.5%	2.5%	8.8%	6.2%	50.6%	15.7%

Source – ONS 2010-based Population Projections

It is notable that the projected decline in people in the working age groups are not replicated at a regional or national level – the projected decrease among 18-24 year olds in particular is prevalent in South Worcestershire and the county but is not present in the region or in the whole of England, both of which have a projected increase. The decline is also projected to be pronounced in the 45-64 age group in South Worcestershire, which again is not representative of the national figures.

Within South Worcestershire, Malvern Hills has notable declines in all of the age groups with the exception of those aged 65-plus, with projected decreases especially significant in 18-24 age range, although the number of people aged 0-17 and 45-64 are also projected to have notable declines. Wychavon has only very small increases projected in the 0-17 and 25-44 age groups, with falls of around 5% among those aged 18-25 and 45-64. Worcester City has a notably smaller projected increase in the 65-plus age group (although still significant at over 45%) but has projected increases in each of the age ranges below 65.

2. ONS 2010-based Population Projections - Components of Change

Table 3 below shows the components of change assumptions that have been used in the ONS 2010-based population projections. It should be noted that the assumptions are based on data taken from the previous 5 years, so the assumptions are based on 2005-10.

It can be seen that in the assumptions migration has by far the greatest effect on South Worcestershire. In total migration is projected to account for an increase of 28,300 persons in South Worcestershire in the 2010-30 period, with a projected increase of 15,000 due to internal migration, and a projected increase of 14,300 due to migration from areas overseas. South Worcestershire is projected to experience a small net loss due to cross-border migration with other countries in the UK. Natural change is projected to give almost no change, with slightly more births in South Worcestershire than deaths.

Table 3 – Components of Change¹ Assumptions for South Worcestershire Districts, 2010-30

Area	Natural Change	Internal Migration	Cross-border Migration	International Migration	Total Migration	Total Population Change
Malvern Hills	-8,700	13,200	0	2,000	15,100	6,400
Worcester City	11,300	-5,900	0	4,300	-1,200	10,300
Wychavon	-1,900	7,700	-2,000	8,000	14,400	12,600
South Worcs	700	15,000	-2,000	14,300	28,300	29,300
Worcestershire	3,800	34,400	-5,700	24,200	53,100	57,200

Source – ONS 2010-based Population Projections. Values may not sum due to rounding errors

It is noted that the international migration component of the projected change is far bigger in both South Worcestershire and the county as a whole than it was in the 2008-based projections. Indeed, in the 2008-based assumptions the international migration component for 2010-30 was projected to be a 2,000 net **loss** for South Worcestershire. This is due to the fact that international migration into the area has increased in the 2008-10 period. This means the 2005-10 period which the 2010-based projections are based on has a larger international in-migration than the 2003-08 period did, which the 2008-based population projections are based on. The changes to how levels of

¹ Internal migration refers to moves within England. Cross border migration refers to moves between England and Scotland, Wales and Northern Ireland. International migration includes moves between England and the Republic of Ireland, moves between England and the rest of the World, as well as migrant switchers, visitor switchers and asylum seekers.

immigration are allocated to smaller areas have also had an impact on the projected international migration figures. However, the projected level of internal migration has decreased in the 2010-based projections, again due to changes in the 2008-10 observed figures. The total net migration projected for 2010-30 in the 2010-based projections is 28,300 in South Worcestershire, compared with 24,200 in the 2008-based assumptions.

Table 4 – Original Net International Migration for South Worcestershire Districts, 2001-10

Area	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2001-06 avg	2003-08 avg	2005-10 avg
Malvern Hills	-95	-70	-94	79	256	274	338	180	-20	15	171	206
Worcester City	-395	-209	-549	-152	-241	148	366	480	-150	-309	-86	121
Wychavon	-128	-73	-169	31	141	134	133	-60	-20	-40	54	66
South Worcs	-618	-352	-812	-42	156	556	837	600	-190	-334	139	392
Worcestershire	-989	-426	-1,196	-137	-153	370	882	490	-340	-580	-47	250

Source – ONS mid-year estimates, components of change, 2001-10

Table 4 illustrate the change in net international migration from 2001-02 up until 2009-10. It is noted that a fairly substantial net out-migration from South Worcestershire in the early years of the time period up until 2004-05 have given way to a period of fairly significant in-migration from overseas, especially in the years 2006-09. This is linked to the Accession of the A8 Countries in May 2004, coupled with the period of economic stability which made the UK an attractive destination for migrant workers. The final two years of 2008-10 actually sees a decrease in the inflow from a peak in 2007-08 which then changes to a net outflow from South Worcestershire to areas overseas in 2009-10 – this is possibly due to the economic downturn and due to people from overseas leaving the country to return home or to find work elsewhere. In general however the later years in the time period have still experienced higher in-migration from overseas than earlier years. The figures are particularly volatile in Worcester City, in which the international migration rises from a trough in 2003-04 of -550, to a peak in 2008-09 of almost 500, then falls dramatically to a net loss of -150 just a year later.

It can be seen that in South Worcestershire the average annual migration from overseas for 2001-06 is a net outflow of 330. This is the time period when the 2006-based projections are based upon, and compares to an annual inflow of almost 150 in 2003-08, which is the base for the assumptions in the 2008-based projections. It is seen that the average net inflow for the 2005-10 time period is almost 400 – however, it is remembered that the 2010-based projections use the new indicative migration and population estimates, which are presented below.

Table 5 – Indicative Net International Migration for South Worcestershire Districts, 2005-10

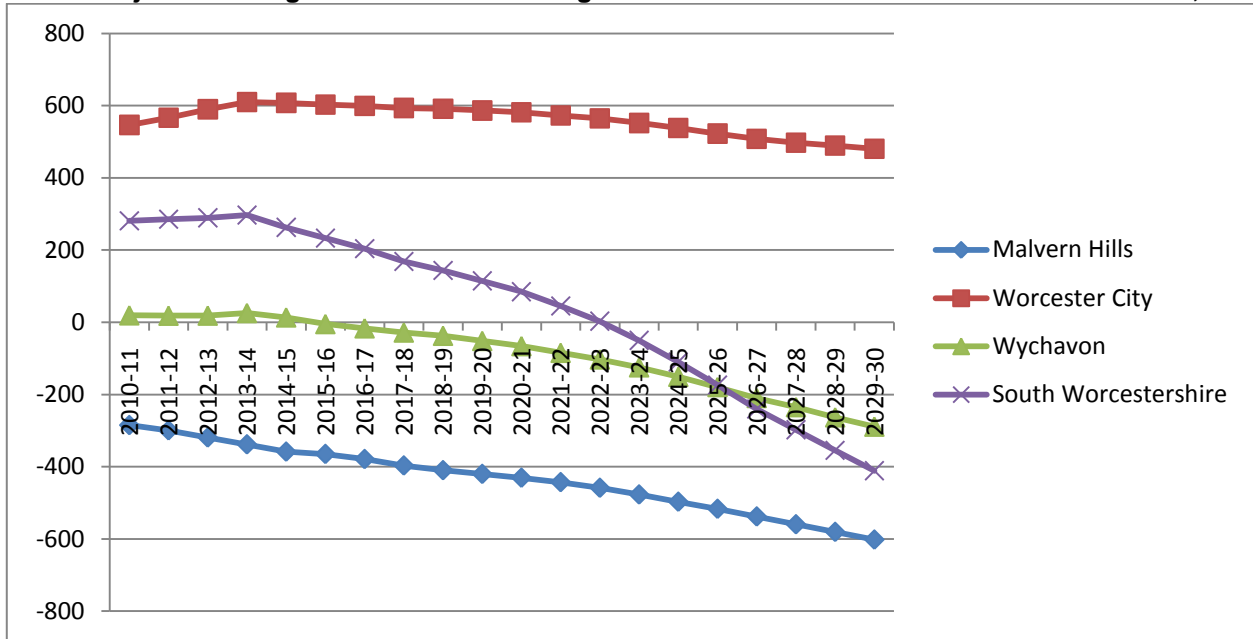
Area	2005-06	2006-07	2007-08	2008-09	2009-10	2005-10 average
Malvern Hills	143	50	63	15	12	57
Worcester City	-4	-33	309	-65	16	45
Wychavon	318	196	314	161	216	241
South Worcs	457	213	686	111	244	342
Worcestershire	857	321	1,027	17	172	479

Source – ONS, indicative estimates, 2006-10

ONS have only released indicative estimates for 2005-06 onwards, so indicative estimates for the years before that remain unchanged. It can be seen that although the indicative estimates increase the 2005-10 average in-migration from overseas into Worcestershire as a whole, from 250 to almost 500, the South Worcestershire figure is actually reduced from almost 400 to 350 per annum. It is noted that this is still an increase on the estimate of 150 per annum which was used in the assumptions to produce the 2008-based projections.

It is also noted that the distribution of migration from overseas within South Worcestershire is different in the indicative estimates than was the case in the mid-year estimates, with Wychavon experiencing almost a net 250 in-migration from overseas in the indicative estimates, much higher than the other South Worcestershire districts at about 50 per annum. This is much different to the case in the mid-year estimates, in which Malvern Hills has the highest in-migration from overseas at around 200 per annum for the 2005-10 period, with the Wychavon figure at less than 70 per annum. This change may be a reflection of the high level of migrant workers that Wychavon receives.

Figure 2 – Projected Change due to Natural Change within South Worcestershire and the Districts, 2010-30

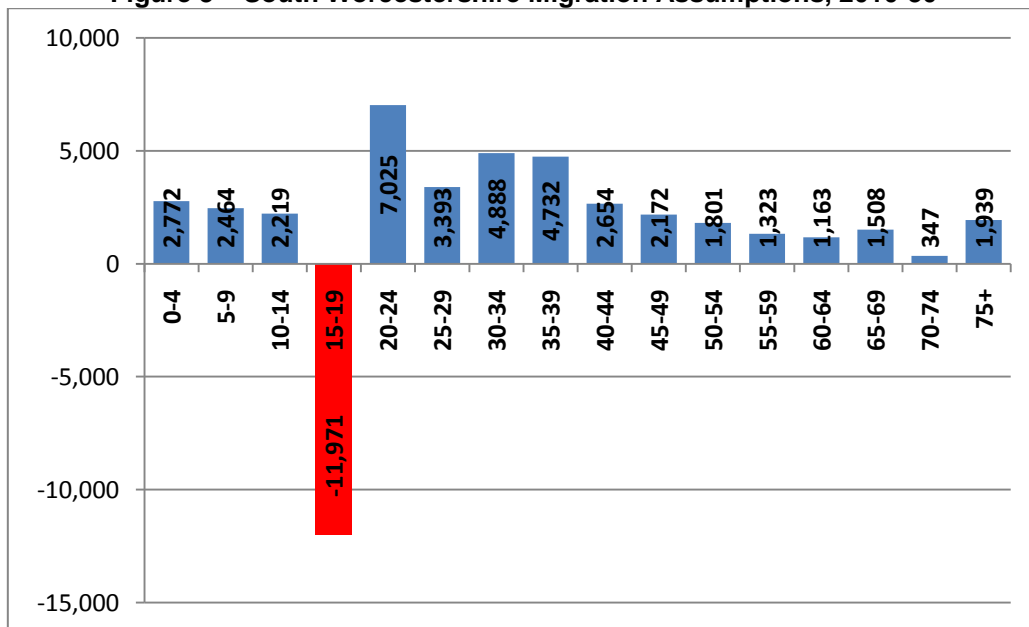


Source – ONS 2010-based population projections assumptions

It can be seen that the Natural Change component within South Worcestershire is projected to decrease in the future. As has already been stated the effect of Natural Change across the whole of the 2010-30 time period is a net gain of 700 persons in South Worcestershire. This is despite the current situation of more births than deaths in the area. The projected figures for Natural Change show a decline for South Worcestershire from +200 in 2010-11 and positive Natural Change up until 2022-23, then a decline to stand at -400 by 2029-30.

It is noted that the Natural Change in Worcester City is projected to stay fairly constant at +550, with only a slight decline in later years of the projection, whilst the decrease in Natural Change in both Malvern Hills and Wychavon is projected to be more pronounced. This is related to a higher number of deaths in those areas rather than fewer births, and is the consequence of an ageing population especially in those rural districts.

Figure 3 – South Worcestershire Migration Assumptions, 2010-30



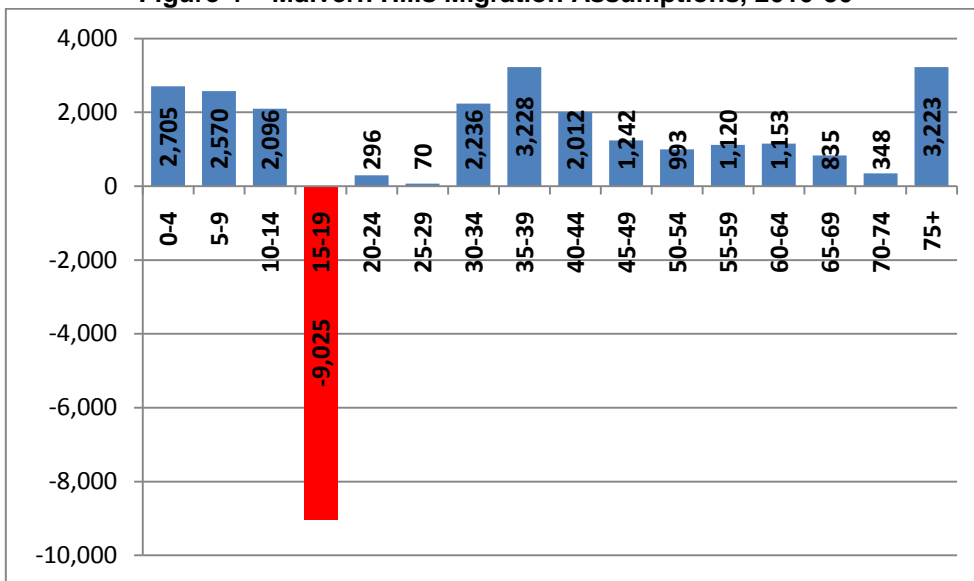
Source – ONS 2010-based population projections assumptions

The total migration assumptions split by age group for the 2010-30 time period for South Worcestershire is shown in Figure 3 above.

As would be expected from the current trend of migration in the area there is in-migration across all of the age groups with the exception of the 15-19 age range, which experiences an out-migration of almost 12,000 persons over the 20

years. The notable in-migration of children along with people aged 30-39 typify the projected movement into the area of families and people with children. The in-migration of people aged 20-29 will include people returning to the area after completing their studies at university as well as an in-migration of migrant workers, whilst there is relatively high number of people projected to come into South Worcestershire across the older age ranges for retirement and pre-retirement purposes.

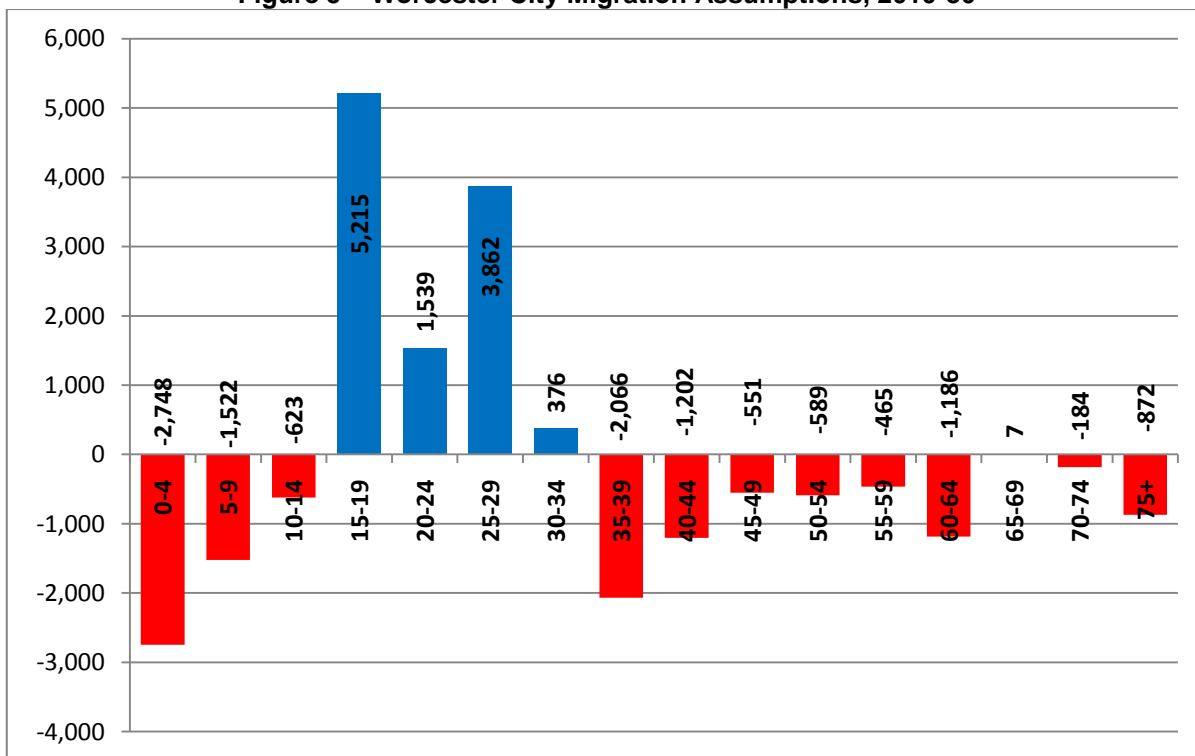
Figure 4 – Malvern Hills Migration Assumptions, 2010-30



Source – ONS 2010-based population projections assumptions

The projected migration profile for Malvern Hills is very similar to that of the whole of South Worcestershire, with high levels of out-migration among students and young adults (over 9,000 in the 15-19 age range) and in-migration among families with children and older people. The in-migration among the pre-retirement and retirement age groups (55-plus) is notably larger in Malvern Hills than in South Worcestershire, especially in the 75-plus age range, reflecting the fact that this district is a popular destination for older people.

Figure 5 – Worcester City Migration Assumptions, 2010-30

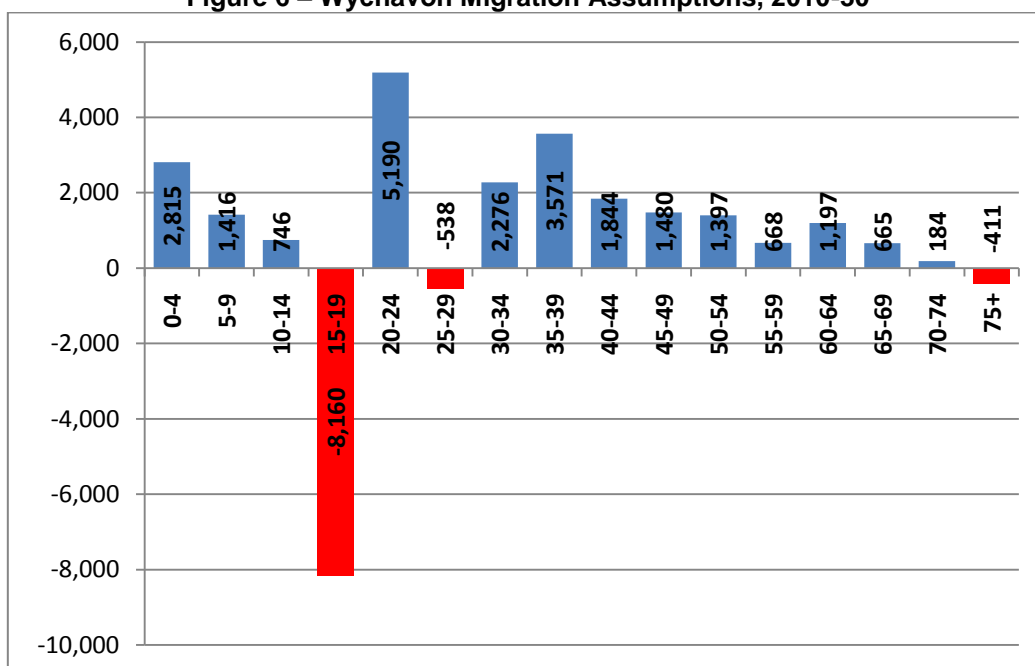


Source – ONS 2010-based population projections assumptions

The migration profile projected for Worcester City over the 20-year period is rather different, with in-migration among young adults aged 15-34, most notably the 15-19 age group, reflecting the position of the University of Worcester and the fact that Worcester City is the principle settlement within the county and has many job opportunities. The other age

groups are projected to migrate away from Worcester City, especially families with young children (particularly 0-9's and 35-44 year olds) and also those aged 60-64, migrating away from urban in favour of rural areas.

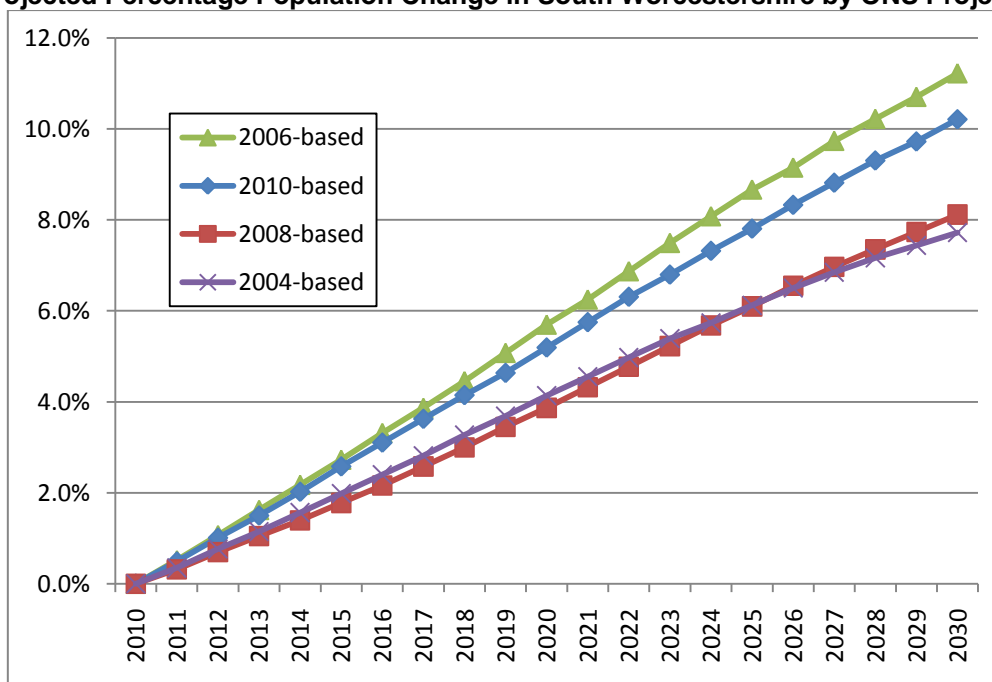
Figure 6 – Wychavon Migration Assumptions, 2010-30



Source – ONS 2010-based population projections assumptions

The projected Wychavon migration profile for the 20-year time period is shown in Figure 6 above. Like Malvern Hills, Wychavon has a large projected out-migration of 15-19 year olds, of over 8,000 people, and an in-migration of families with children, with gains in the 0-14 and 30-39 age ranges. The notable gains among people aged 20-24 will include students who moved away for studies returning to the area. Unlike Malvern Hills however, Wychavon does not have the same high levels of projected in-migration of people in older age groups moving into the area.

Figure 7 – Projected Percentage Population Change in South Worcestershire by ONS Projection, 2010-30



Source – ONS Population Projections 2010-based, 2008-based, 2006-based & 2004-based

Figure 7 shows the difference between the different ONS population projections produced since 2004. It is evident that the projections produced in 2006 project the greatest population increase in South Worcestershire, with a projected

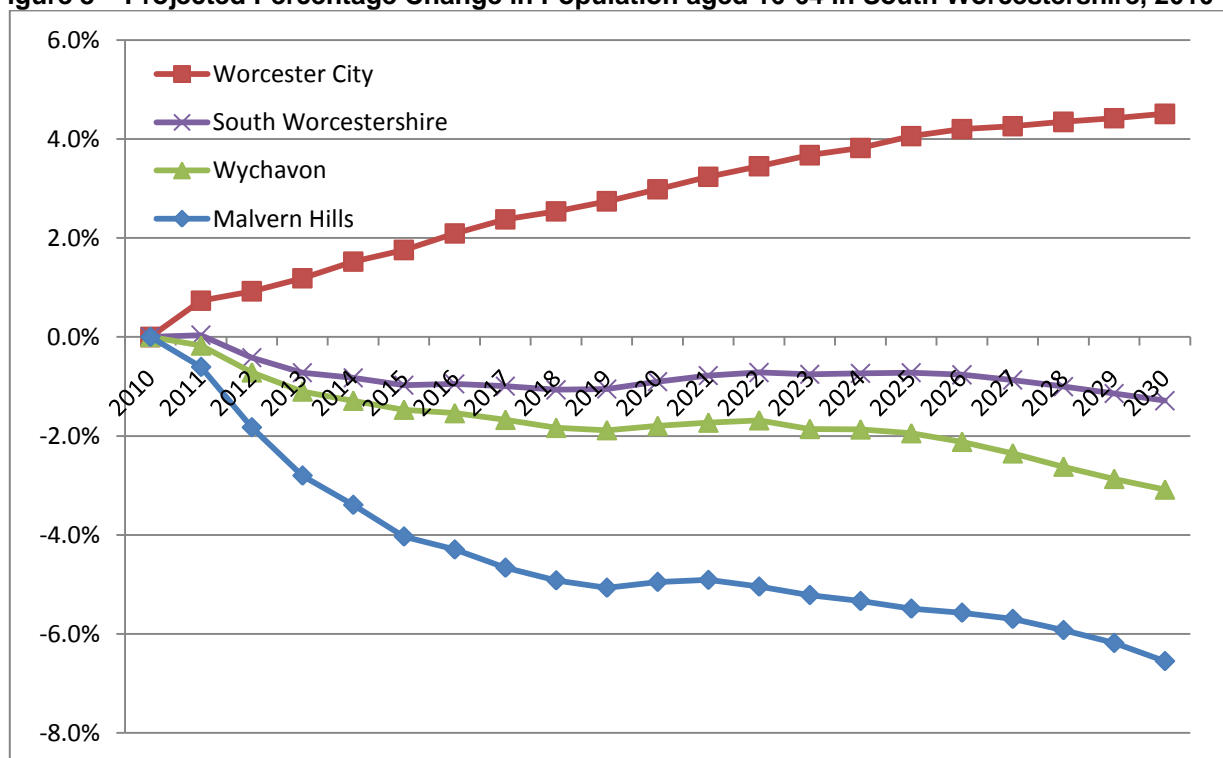
increase of around 11%, or around 32,500 persons. This is because the 2006-based projections were calculated at a time of economic stability, meaning that a high level of migration into the county was built into the assumptions. The recently-released 2010-based population projections give only a slightly lower projected figure for South Worcestershire, with a projected increase of 29,300 (just over 10%). This is because of a higher level of international migration built into the assumptions due to the higher in-migration from overseas in recent years, coupled with the improvements made to the way immigration is allocated to Local Authorities in the new assumptions. The 2008-based and 2006-based projections have similar levels of projected growth, at around 8%, representing an increase of around 23,000 persons. It should be noted that differences made in apportioning international migration and counting student migration were included in the assumptions for the 2008-based projections compared to the previous projections.

3. ONS 2010-based Population Projections - Economic Activity

It is apparent that the large projected increase in the 65-plus age group (55%) coupled with relatively low increases in the working age groups will have an economic impact in South Worcestershire. Whilst similar patterns have been projected to occur both nationally and within the West Midlands Region, growth in the 65-plus age range are smaller at 51% and 45% respectively. Clearly such a big increase of older persons in the future will have an impact in Worcestershire on services provided to older people.

Figure 8 below shows the projected decline in the key 16-64 working age range within South Worcestershire using the ONS 2008-based projections. The projected fall in South Worcestershire among people aged 16-64 is just over 1%, representing around 2,300 persons. The projected decrease is especially noticeable in Malvern Hills, where the decline in people aged 16-64 is projected to be over 6% (almost 2,900 persons). Worcester City has a projected increase in the number of people aged 16-64 of over 4% due to this district having greater job opportunities. This helps to limit the out-migration of people aged 16-64 from South Worcestershire.

Figure 8 – Projected Percentage Change in Population aged 16-64 in South Worcestershire, 2010-30



Source – ONS 2010-based Population Projections & 2010 mid-year estimate