

Glasgow and the Clyde Valley Strategic Development Planning Authority

**To: Glasgow and the Clyde Valley Strategic Development Planning Authority
Joint Committee**

On: 10th September 2018

**Report by
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NRS 2016-based Population and Household Projections - Comparison with SDP (2012-based Population Projections)

1. Summary

- 1.1 The purpose of this report is to update the Joint Committee on the recently published National Records of Scotland (NRS) 2016-based population and household projections and to compare these to the 2012-based projections used to inform the approved 2017 Clydeplan Strategic Development Plan (SDP).

2. Recommendations

- 2.1 It is recommended that the Joint Committee note
- the publication by the National Records of Scotland 2016-based population and household projections;
 - that growth in both population and households is broadly similar for the city region to those set out in SDP; and,
 - the 2016-based projections will be an input into HNDA3 which will inform both the Glasgow City Region's Regional Housing Strategy and Spatial Strategy, National Planning Framework 4 (NPF4), Local Housing Strategies (LHS) and Local Development Plans (LDP).

3. Context

- 3.1 National Records of Scotland (NRS) publish population and household projections every two years. 2016-based population projections for Scottish Areas were published on 28th March 2018 and 2016-based household projections for Scotland were published on 11th July 2018.
- 3.2 The 2016-based projections present an opportunity to monitor progress of the SDP and will form the basis of an updated HNDA to inform a Glasgow City Region Regional Spatial Strategy, National Planning Framework 4 (NPF4), Local Housing Strategies (LHS) and Local Development Plans (LDP).

4. NRS Projections Methodology

- 4.1 Projections are based on recent observed trends in fertility, mortality, migration and household composition. They use assumptions which are based on past trends and do not take account of any future policy or economic changes such as the June 2016 referendum vote to leave the European Union.
- 4.2 The projections have been produced for the next 25 years, to 2041. The SDP and HNDA provide detailed estimates to 2029 and for this reason this paper presents an updated position to 2029. However, for ease of presenting a brief Scotland-wide comparison the 25 year period from 2016-2041 has been utilised, mirroring the NRS report.

5. Overview of Scottish Wide Results 2016-2041

- 5.1 Scotland's population is projected to increase by 5% 2016-2041 (by 288,000 from 5.40 million to 5.69 million). This compares to a projected increase of 9% 2012-2037 in the 2012-based projections (by 467,000 from 5.31 million to 5.78 million). Projected population growth has slowed compared to previous years. Growth is predominantly in the central belt and is driven by migration.
- 5.2 The number of households in Scotland is projected to increase by 13% 2016-2041 (by 317,000 from 2.45 million to 2.76 million). This compares to a projected increase of 17% 2012-2037 (by 396,000 from 2.39 million to 2.78 million). Projected household growth has slowed compared to previous years. Household projections increase by a larger percentage than the population projections as a result of more people living alone or in smaller households.
- 5.3 Scotland's population is ageing with the number of people aged over 65 increasing much faster than the number of children and younger adults. This has an impact on household structure as children tend to live in larger households and older people in smaller ones. The average household size is projected to decrease from 2.17 people in 2016 to 2.02 people in 2041. There are increases in all councils for population aged 75 and over.

6. Clydeplan - Comparison of Population and Household Projections

- 6.1 The SDP used the NRS 2012-based population and household projections as its base. For the period 2012-29 the population was projected to increase by 60,053 (3.4%).
- 6.2 Using the updated 2016-based projections the population for the period 2012-29 is projected to increase by 85,261 (4.8%). This is 25,208 (42%) higher than the 2012-based projections (ref Table 1) mainly due to higher net migration than was projected in 2012. However, the majority of this increase (17,124) has happened in the earlier period (2012-16) and the pattern for the rest of the projection period remains similar to the 2012-based projection.
- 6.2 The increased growth in population is not replicated in the household projections. For the period 2012-29 the number of households was projected to increase by 80,125 (9.8%). Using the updated 2016-based projections the number of households for the period 2012-29 is projected to increase by 80,505 (9.9%). This is 378 higher than the 2012-based projections (refer Table 1).

- 6.3 Although the population is projected to be 25,000 higher than estimated in the SDP by 2029, the number of households remains roughly the same. Household growth has not increased at the same rate as population growth. This could be attributed to a number of factors including changes to household composition which will be explored as part of HNDA3. As one example there is a decreasing gap in life expectancy between men and women which means the number of older men is projected to increase more rapidly and therefore fewer older women are living alone as their partners are also living longer.

Table 1 - Population and Household change in Glasgow City Region (2012-29)

NRS Projection	population change	% population Change	household change	% household change
	2012-29	2012-29	2012-29	2012-29
2012 based - Principal	60,053	3.4%	80,125	9.8%
2016 based - Principal	85,261	4.8%	80,503	9.9%
Difference	25,208		378	

Source: National Records of Scotland 2018

- 6.4 NRS used a revised population projection methodology for the 2014-based projections onwards and this approach has had an impact on the distribution of population and households within Scotland's local authorities. One of the main changes is to the way migration is calculated and this has a larger impact on areas with higher levels of migration change than others, such as cities. The distribution of population and household change within the city region will be explored as part of HNDA3.
- 6.5 Household projections are one of the key inputs to the HNDA process. The HNDA takes account of a range of evidence, scenarios and assumptions to provide housing estimates which are an input to setting housing supply targets and identifying the Housing Land Requirement for the Development Plan.
- 6.6 NRS have produced council area profiles providing a quick snapshot of information about an area. They contain data on their statistics including population, births, deaths, life expectancy, migration, marriages, civil partnerships, households and dwellings and include the latest population and household projections. The profiles can be accessed on their website at www.nrscotland.gov.uk/statistics-and-data/statistics/stats-at-a-glance/council-area-profiles.
- 6.7 The comparison of the 2012 and 2106 based projections, being broadly similar, has shown that the demographic framework set out in the 2017 SDP, which was chosen as the most appropriate basis upon which to support its Vision and Spatial Development Strategy, can be seen to provide reassurance to Local Authorities as they take forward their Local Development Plans.