SUB-NATIONAL HOUSEHOLD PROJECTIONS
(2018-based, revised): CITY & COUNTY OF SWANSEA

Mae'r ddogfen hefyd ar gael yn Gymraeg / This document is also available in Welsh

Introduction

On 4 August 2020, the Welsh Government (WG) published the latest (revised*) trend-based household projections for the 22 local authority areas in Wales. The projections cover the 25-year period from 2018 to 2043. These supersede earlier household projections, including the previous 2014-based set. The 2018-based projections are likely to be the last published before the 2021 Census results.

Household projections are important for policy development, planning, and the provision of public services within Wales. They enable public and private organisations to be able to estimate future numbers of households and associated demand for housing and related services, for example education, health, social care and utilities, at a local area level.

Household projections are not forecasts of numbers of dwellings or houses. They can only provide an indication of future demand for housing based on recent trends and, as the process of demographic change is cumulative, become increasingly uncertain the further they are carried forward. The projections are not policy-based forecasts of what may happen and do not make allowances for the effects of local or central government policies or wider socio-economic factors on future population change and household formation.

These projections are based on the latest (2018-based) population projections, also published in August 2020, and assumptions about household composition and characteristics based on trends identified using Census data. This note provides a brief overview of the latest WG household projections and focuses on the figures for Swansea.

*__Note__: These household projections revise those originally published on 31 March 2020, following discovery of an error in the sub-national population projections caused by incorrect processing of cross-border flows between Wales and England in the national projections.

Methodology

Household projections provide estimates of the future numbers of households and the people living in them. They are based on the trend-based population projections (which are dependent on assumptions about projected future fertility, mortality and migration) and a range of assumptions about household composition and characteristics.

Using Census data from 2001 and 2011, household membership rates – the likelihood of a person of a particular age and sex to be a member of each type of household – are calculated for 12 household types, in various adult and child number combinations. These membership rates are then applied to the projected population (within private households, estimated using Census data) in order to project forward the numbers and types of households in local authority areas in Wales from 2018 (the base year) up to 2043.

This note mainly relates to the *principal* 2018-based household projections produced by WG. However, variant projections (based on alternative population change assumptions) have also been published, and these are considered in a separate section of this note.

Projected change in Wales

The total number of households in Wales is projected to grow from 1.359 million in 2018 to 1.419 million by 2028 and to 1.486 million by 2043. This would represent an increase of

60,100 households (+4.4%) from 2018 to 2028, equivalent to an average annual growth of around 6,000 households (+0.4% p.a.).

The 2018-based projections suggest that single-person households will remain the most common household type in Wales from 2018, and this will increase over time; growing by 40,900 (+9.4%) between 2018 and 2028 to account for 33.5% of all households. 'Two person (no children)' households remain the second most common household type, at 31.0% of the total in 2028. Significant growth between 2018 and 2028 is also projected for 'two-person (1 adult, 1 child)' households, up by 7,000 or 12.9%. One-parent households are projected to grow from 92,200 in 2018 to 99,200 in 2028, an increase of 7,000 or 7.6%. Overall numbers of households in Wales with four or more adults and no children are projected to increase by 7.6% from 44,400 in 2018 to 47,800 in 2028.
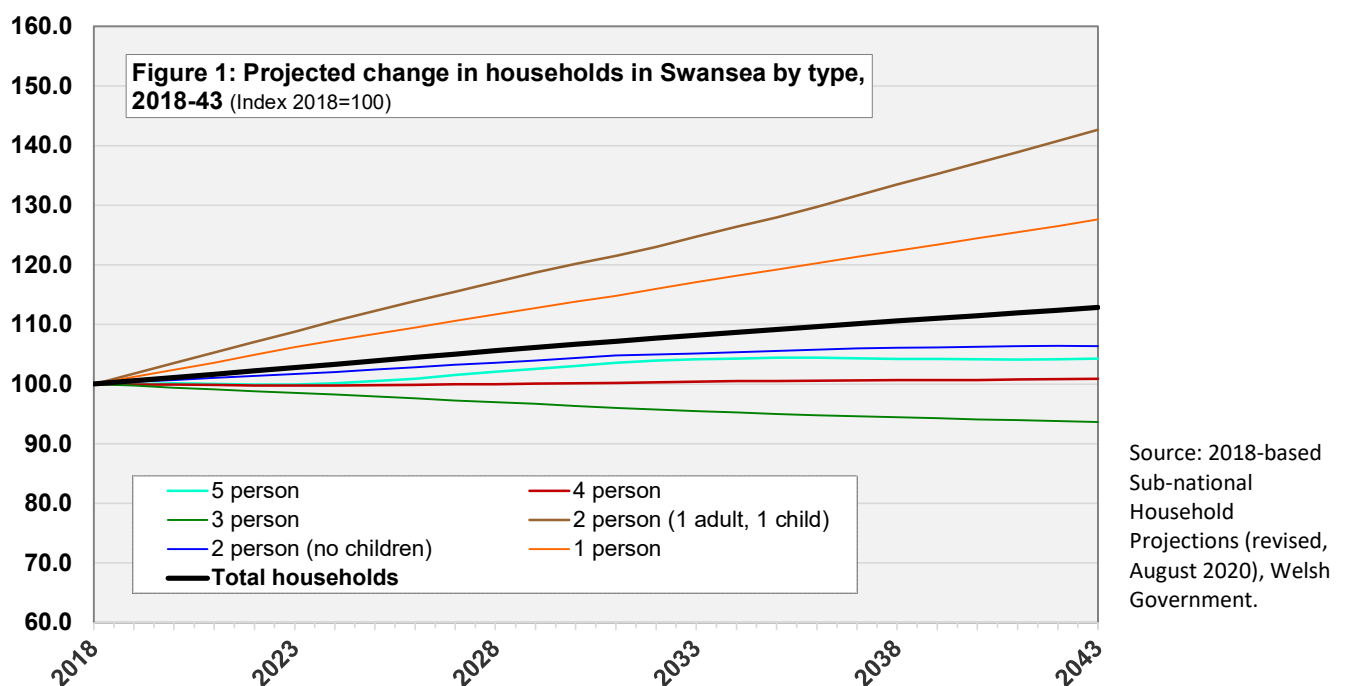
The projected level of change in total households is not evenly distributed across Wales. Between 2018 and 2028 an increase in households is projected in 21 of the 22 local authority areas in Wales, with the percentage change figures ranging from -1.6% in Ceredigion to +8.6% in Vale of Glamorgan. Further details for all local authority areas, for the first ten years and the full 25-year period, are included in Appendix 1.

Projected household growth in Swansea

In the 2018-based projections, the total number of households in Swansea is projected to increase from an estimated 108,900 in 2018 to 115,000 in 2028 (+6,100 or +5.6% over 10 years), and to 122,800 by 2043 (+14,000 or +12.8% over 25 years).

As a result, Swansea records the second highest projected level of growth (numeric) in Wales over the first ten years of the projection, behind only Cardiff (+8,700). As a percentage, Swansea has the sixth highest projected rate of growth between 2018 and 2028, behind Vale of Glamorgan, Newport, Bridgend, Rhondda Cynon Taf and Cardiff.

The latest projections for Swansea, both in terms of total households and by type (grouped), where 2018 values are indexed to 100, are in Figure 1 below. It shows a steady increase in the total number of households (black line), with much steeper increases for two-person (one adult) and single-adult households, and the sharpest fall in three-person households.

Figure 1: Projected change in households in Swansea by type, 2018-43 (Index 2018=100)

Source: 2018-based Sub-national Household Projections (revised, August 2020), Welsh Government.
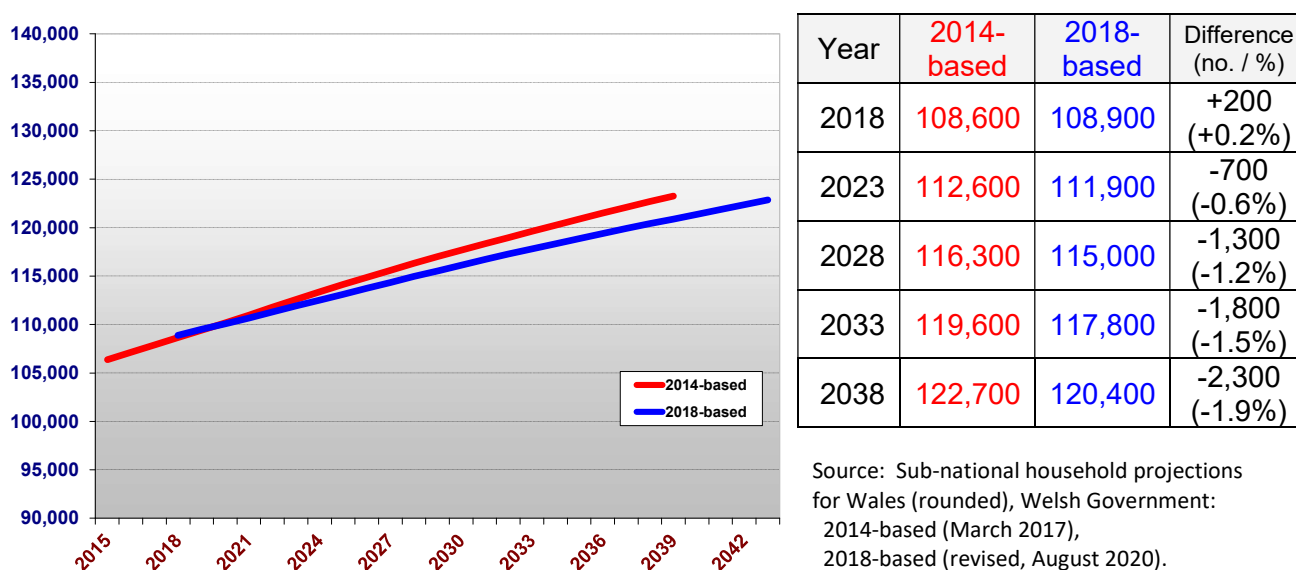
Focusing on the first ten years of the projection (2018-2028), the key trends for Swansea by household type are as follows:

- The most significant growth is projected to be in single-person households, by approximately 4,500 (+11.7%), up from 38,000 in 2018 to 42,500 in 2028.
- One-parent households are projected to increase by 10.2% (+800) from 7,800 in 2018 to 8,500 in 2028, with growth within this category all due to 'one adult, one child' households (approx. +800 or 17.1%).
- The number of 'two adult, no children' households is projected to increase by 1,200 (+3.6%) from 32,000 in 2018 to 33,200 in 2028.
- The number of households with 4+ adults and no children is projected to increase from around 4,500 to 4,800 (+8.0%) over the 10 years – in part continuing recent growth in adult shared households including students.
- However, the number of households containing two (or more) adults and (any) children is projected to fall over the period by 200 (-1.1%).
- In this projection, Swansea's private household population (i.e. excluding communal establishment residents) is projected to increase by around 7,700 (+3.2%), from 241,700 in 2018 to 249,400 in 2028.
- The above (and other) changes combine to result in a projected decrease in average household size in Swansea from 2.22 persons in 2018 (Wales 2.27) to 2.17 in 2028 (Wales 2.23).
- Full details of the projected number of households in Swansea (2018-2043), in total and for each of the 12 identified household types, are provided in Appendix 2.

Comparisons with 2014-based household projections

The new WG household projections for Swansea begin from a similar base level (for 2018) than those produced previously, being just over 200 units higher. Over the first common ten-year period (2018-28), projected growth in the 2018-based projections is 5.6%, lower than the 7.1% figure in the previous (2014-based) projections. In the full 25 years from their base year, the rate of increase for Swansea in the latest household projections, at 12.8%, is lower than the 2014-based set, which projected 16.7% growth over 25 years. As illustrated in Figure 2 below and accompanying data table, the gap between the figures widens slightly for the duration of the projection period.

Figure 2: Comparisons of WG 2014 and 2018-based (revised) household projections for Swansea

Year	2014-based	2018-based	Difference (no. / %)
2018	108,600	108,900	+200 (+0.2%)
2023	112,600	111,900	-700 (-0.6%)
2028	116,300	115,000	-1,300 (-1.2%)
2033	119,600	117,800	-1,800 (-1.5%)
2038	122,700	120,400	-2,300 (-1.9%)

Source: Sub-national household projections for Wales (rounded), Welsh Government: 2014-based (March 2017), 2018-based (revised, August 2020).

The difference between the 2014-based and 2018-based population and household projection figures is mostly attributable to changes in the base year population and associated components of change data, therefore reflecting the change in demographic trends seen during this time period. There have been no significant changes to the household projections methodology for the 2018-based set. However, a change made to the population projections methodology, namely basing the assumptions for internal (UK) migration on migration rates rather than fixed numbers, will have an indirect effect on the household projections.

Variant Household Projections

Alternative projections can be produced by varying the assumptions used. To illustrate the inherent uncertainty of producing population and household projections, the WG release also included variant household projections for each local authority area in Wales. Two variants have initially been produced alongside the principal household projection:

- A lower variant, based on the lower population projection variant – with low fertility, life expectancy and migration assumptions
- A higher variant, based on the higher population projection variant – with high fertility, life expectancy and migration assumptions.

It should be noted that these variants are not intended to provide lower and upper ranges for the projections, but to be purely illustrative; to show how possible variations in the fertility, mortality and migration assumptions can impact both the population and household projections and that this impact generally increases further into the future.

The effect of these variant projections for the period from 2018 (the base year) to 2028 (10 years) and 2043 (25 years) is shown in Table 1 below. Over the short-term (10-year) period, projected household growth levels vary from around 5,000 to 6,900 households – which compares with the principal projection figure of 6,100. Over the full 25-years, projected growth levels vary from 8,600 to 18,100 households (principal: +14,000).

Table 1: Welsh Government 2018-based variant household projections to 2028 and 2043, Swansea

Variant: Swansea	Projected change to 2028	Projected change to 2043
Lower variant	+5,000 (+4.6%) to 113,800	+8,600 (+7.9%) to 117,500
Principal projection	*+6,100 (+5.6%) to 115,000*	*+14,000 (+12.8%) to 122,800*
Higher variant	+6,900 (+6.4%) to 115,800	+18,100 (+16.6%) to 126,900

Source: 2018-based Sub-national Household Projections - Principal and Variant (revised August 2020), Welsh Government.

Conclusion

The Welsh Government's 2018-based sub-national household projections (revised August 2020) point to a continuation of growth in Swansea, up by 6,100 (+5.6%) over the first ten-year period; however, the rate of growth is slightly lower than projected previously.

If you would like any further information about household projections, or have any further queries regarding population and demographic change in Swansea, please contact:

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2018-BASED HOUSEHOLD PROJECTIONS FOR LOCAL AUTHORITY AREAS IN WALES (PRINCIPAL PROJECTION)

Projected households and change, in thousands

Local Authority	2018	2023	2028	2018-28 change (%)	2033	2043	2018-43 change (%)
Isle of Anglesey	31.2	31.4	31.6	+0.5 (+1.4%)	31.8	32.0	+0.9 (+2.8%)
Gwynedd	54.3	55.5	56.7	+2.4 (+4.3%)	57.8	59.7	+5.3 (+9.8%)
Conwy	52.8	53.8	54.8	+2.1 (+3.9%)	55.7	57.1	+4.3 (+8.2%)
Denbighshire	41.6	42.3	42.8	+1.1 (+2.8%)	43.2	43.8	+2.2 (+5.2%)
Flintshire	66.2	67.8	68.9	+2.7 (+4.0%)	69.6	70.9	+4.6 (+7.0%)
Wrexham	58.7	59.1	59.3	+0.5 (+0.9%)	59.4	59.6	+0.8 (+1.4%)
Powys	59.7	60.5	61.1	+1.5 (+2.4%)	61.5	62.3	+2.7 (+4.4%)
Ceredigion	31.2	30.7	30.7	-0.5 (-1.6%)	30.7	30.3	-0.9 (-2.8%)
Pembrokeshire	55.6	57.2	58.4	+2.8 (+5.0%)	59.3	60.8	+5.2 (+9.3%)
Carmarthenshire	81.5	83.1	84.5	+3.0 (+3.7%)	85.7	87.8	+6.3 (+7.7%)
Swansea	**108.9**	**111.9**	**115.0**	**+6.1 (+5.6%)**	**117.8**	**122.8**	**+14.0 (+12.8%)**
Neath Port Talbot	62.1	63.1	64.2	+2.2 (+3.5%)	65.1	66.8	+4.7 (+7.6%)
Bridgend	61.8	63.9	65.7	+3.9 (+6.3%)	67.2	70.0	+8.1 (+13.1%)
The Vale of Glamorgan	57.2	59.9	62.2	+4.9 (+8.6%)	64.1	67.2	+9.9 (+17.4%)
Cardiff	153.2	157.3	161.9	+8.7 (+5.7%)	166.3	172.7	+19.4 (+12.7%)
Rhondda Cynon Taf	104.9	108.0	110.8	+6.0 (+5.7%)	113.4	118.4	+13.6 (+12.9%)
Merthyr Tydfil	24.9	25.2	25.5	+0.6 (+2.6%)	25.7	26.2	+1.3 (+5.2%)
Caerphilly	76.7	78.0	78.8	+2.1 (+2.8%)	79.4	80.8	+4.2 (+5.5%)
Blaenau Gwent	31.1	31.3	31.5	+0.4 (+1.3%)	31.6	32.2	+1.1 (+3.6%)
Torfaen	40.0	40.8	41.5	+1.6 (+3.9%)	42.2	43.3	+3.4 (+8.4%)
Monmouthshire	40.1	41.2	42.1	+2.0 (+5.0%)	42.8	43.9	+3.7 (+9.3%)
Newport	65.2	68.1	70.8	+5.6 (+8.6%)	73.1	77.8	+12.6 (+19.4%)
WALES	1,358.8	1,390.1	1,418.8	**+60.1 (+4.4%)**	1,443.5	1,486.2	**+127.5 (+9.4%)**

Source: Subnational household projections for Wales (2018-based, revised), Welsh Government, 4 August 2020.

Welsh Government release web page: https://gov.wales/subnational-household-projections

2018-BASED POPULATION PROJECTIONS FOR SWANSEA BY HOUSEHOLD TYPE

Household and population figures in thousands

Year	H	PHP	Ave HS	H'hld Type: 1P	2P (0C)	2P (1A, 1C)	3P (0C)	3P (2A, 1C)	3P (1A, 2C)	4P (0C)	4P (2+A, 1+C)	4P (1A, 3C)	5P+ (0C)	5P+ (2+A, 1+C)	5P+ (1A, 4+C)
2018	108.9	241.7	2.22	38.0	32.0	4.7	6.7	6.4	2.1	2.8	9.0	0.7	1.7	4.5	0.2
2019	109.5	242.4	2.21	38.5	32.1	4.8	6.7	6.4	2.1	2.8	9.0	0.7	1.7	4.4	0.2
2020	110.1	243.1	2.21	38.9	32.2	4.9	6.6	6.4	2.1	2.8	9.0	0.7	1.7	4.4	0.2
2021	110.7	243.8	2.20	39.4	32.3	5.0	6.6	6.4	2.1	2.8	9.0	0.7	1.7	4.4	0.2
2022	111.3	244.4	2.20	39.9	32.4	5.1	6.5	6.4	2.1	2.8	9.0	0.7	1.7	4.4	0.2
2023	111.9	245.1	2.19	40.4	32.5	5.1	6.5	6.4	2.1	2.8	8.9	0.7	1.7	4.4	0.2
2024	112.5	245.9	2.19	40.8	32.6	5.2	6.4	6.4	2.1	2.8	8.9	0.7	1.8	4.4	0.2
2025	113.1	246.7	2.18	41.2	32.8	5.3	6.4	6.4	2.1	2.8	8.9	0.7	1.8	4.4	0.2
2026	113.7	247.6	2.18	41.6	32.9	5.4	6.3	6.4	2.1	2.8	8.9	0.7	1.9	4.3	0.2
2027	114.3	248.5	2.17	42.1	33.0	5.5	6.3	6.4	2.1	2.9	8.9	0.7	1.9	4.3	0.2
2028	115.0	249.4	2.17	42.5	33.2	5.5	6.3	6.4	2.1	2.9	8.9	0.7	2.0	4.3	0.2
2029	115.5	250.2	2.17	42.9	33.3	5.6	6.2	6.4	2.1	2.9	8.9	0.7	2.0	4.3	0.2
2030	116.1	251.1	2.16	43.3	33.4	5.7	6.2	6.4	2.1	2.9	8.9	0.7	2.1	4.3	0.2
2031	116.7	251.9	2.16	43.7	33.5	5.7	6.2	6.4	2.1	2.9	8.9	0.7	2.1	4.3	0.2
2032	117.3	252.7	2.15	44.1	33.6	5.8	6.1	6.4	2.1	3.0	8.9	0.7	2.2	4.2	0.2
2033	117.8	253.4	2.15	44.5	33.6	5.9	6.1	6.4	2.1	3.0	8.9	0.7	2.2	4.2	0.2
2034	118.3	254.0	2.15	44.9	33.7	6.0	6.1	6.4	2.1	3.0	8.9	0.7	2.2	4.2	0.2
2035	118.9	254.7	2.14	45.3	33.8	6.0	6.1	6.4	2.1	3.0	8.9	0.7	2.2	4.2	0.2
2036	119.4	255.3	2.14	45.7	33.9	6.1	6.0	6.4	2.1	3.0	8.8	0.7	2.3	4.2	0.2
2037	119.9	255.9	2.13	46.1	33.9	6.2	6.0	6.4	2.1	3.0	8.8	0.7	2.3	4.2	0.2
2038	120.4	256.5	2.13	46.5	33.9	6.3	5.9	6.4	2.1	3.1	8.8	0.7	2.3	4.2	0.2
2039	120.9	257.0	2.13	46.9	34.0	6.4	5.9	6.4	2.1	3.1	8.8	0.7	2.3	4.2	0.2
2040	121.4	257.6	2.12	47.3	34.0	6.5	5.9	6.4	2.1	3.1	8.8	0.7	2.3	4.2	0.2
2041	121.9	258.2	2.12	47.7	34.0	6.6	5.9	6.4	2.1	3.1	8.8	0.7	2.3	4.2	0.2
2042	122.3	258.7	2.11	48.1	34.0	6.6	5.8	6.4	2.1	3.1	8.8	0.7	2.3	4.2	0.2
2043	122.8	259.3	2.11	48.5	34.0	6.7	5.8	6.4	2.1	3.1	8.8	0.7	2.3	4.2	0.2
Projected change: 2018 to 2028															
no.	+6.1	+7.7	-0.05	+4.5	+1.2	+0.8	-0.5	-0.0	+0.0	+0.1	-0.1	+0.0	+0.3	-0.1	-0.0
%	+5.6	+3.2	-2.3	+11.7	+3.6	+17.1	-6.8	-0.2	+0.2	+2.4	-0.8	+0.2	+17.3	-3.1	-11.1
Projected change: 2018 to 2043															
no.	+14.0	+17.7	-0.11	+10.5	+2.0	+2.0	-0.9	-0.0	-0.0	+0.3	-0.2	+0.0	+0.6	-0.3	-0.0
%	+12.8	+7.3	-4.9	+27.6	+6.4	+42.7	-13.7	-0.7	-0.4	+9.8	-1.8	+0.8	+37.1	-6.8	-22.7

Source: Subnational household projections for Wales (2018-based, revised), Welsh Government, 4 August 2020.

Key:
H = Total households; **PHP** = Private Household Population; ***Ave HS*** = Average Household Size

Household Types:
1P = One person household
2P = Two-person household
3P = Three-person household
4P = Four-person household
5P+ = Five or more person household.

A = no. of adults; C = no. of children.