

VALE OF GLAMORGAN
REPLACEMENT LOCAL DEVELOPMENT PLAN 2021
- 2036

SUPPLEMENTARY
DEMOGRAPHIC
EVIDENCE - WG 2022
BASED PROJECTIONS

November 2025



BACKGROUND PAPER - BP8A



Executive summary

- i. On 20th November 2025, the Welsh Government published 2022 based population and household projections for the 22 local authorities in Wales. It is necessary to consider the assumptions that inform these projections in the context of the housing requirements set out in the Deposit Replacement Local Development Plan (RLDP).
- ii. At the time of preparation of the RLDP Preferred Strategy and Deposit Plan, the latest set of local authority projections were the 2018-based population and household projections, published in 2020. The RLDP is supported by Demographic Evidence prepared by Edge Analytics and the Background Paper on Housing and Employment Growth Options (BP7). These demonstrate that a range of population growth scenarios were considered. This included the 2018 based principal projections, variant projections and a range of other scenarios, including dwelling led scenarios.
- iii. The RLDP housing requirement is based on a dwelling led projection and is set at a level that is demonstrated to be deliverable, reflecting housing completions over a 10-year period, whilst balancing environmental capacity with affordable housing need. The 2022-based principal population and household projections for the Vale of Glamorgan are higher than both the 2018-based projections and the RLDP.
- iv. National planning policy is clear that it is important to consider a range of evidence when setting housing requirements for the RLDP. If the 2022 projections are considered in isolation without full scrutiny of the assumptions behind them, then this may imply that the RLDP should be seeking a higher level of growth. However, it is clear from the assessment of the evidence and the advice of the Chief Statistician that this is not the approach that should be taken, as “users should consider the full range of variants when using the projections, to reflect the uncertainty in current and future migration patterns.”
- v. The projections for the Vale show significant variation in internal migration in particular and therefore should be treated with caution. The projections are trend based and are therefore affected by specific factors that may have occurred within the previous 5 years. The 5 years in question included a period of high housebuilding associated with a newly adopted LDP, as well as the Covid 19 pandemic, where many students returned to home from term-time addresses and re-registered with GPs in the Vale.
- vi. Given the fluctuation in recent migration figures, consideration of longer-term trends is appropriate, and it is noted that the population change identified in the 10-year migration variant in particular is of a similar level to that proposed under the RLDP projection.
- vii. In conclusion, for the reasons identified above, despite the updated projections, the RLDP housing requirement continues to represent a robust basis to deliver a sustainable and deliverable level of growth over the plan period.

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1 Introduction

- 1.1 On 20th November 2025, the Welsh Government published 2022 based population and household projections for the 22 local authorities in Wales.
- 1.2 At the time of preparation of the RLDP Preferred Strategy and Deposit Plan, the latest set of local authority projections were the 2018-based population and household projections, published in 2020. The RLDP is supported by Demographic Evidence prepared by Edge Analytics and the Background Paper on Housing and Employment Growth Options (BP7). These demonstrate that a range of population growth scenarios were considered. This included the 2018 based principal projections, variant projections and a range of other scenarios, including dwelling led scenarios. For the reasons explained in the Background Paper, the preferred growth option was the 10-year dwelling led scenario, reflecting past build rates for a 10-year period, equating to 526 dwellings per annum and a population growth of 13,154 over the plan period 2021 to 2036.
- 1.3 The scale of growth was subject to consultation as part of the Preferred Strategy and in September 2024, Full Council endorsed this level of growth as the basis for the RLDP.
- 1.4 Paragraph 4.2.6 of Planning Policy Wales (PPW) states that “the latest Welsh Government local authority level Household Projections for Wales, alongside the latest Local Housing Market Assessment (LHMA) and the Well-being plan for a plan area, will form a fundamental part of the evidence base for development plans. These should be considered together with other key evidence in relation to issues such as what the plan is seeking to achieve, links between homes and jobs, the need for affordable housing, Welsh language considerations and the deliverability of the plan, in order to identify an appropriate strategy for the delivery of housing in the plan area. Appropriate consideration must also be given to the wider social, economic, environmental and cultural factors in a plan area in order to ensure the creation of sustainable places and cohesive communities.”
- 1.5 Whilst the Council has agreed the level of growth for the RLDP, it is necessary to consider the new projections as part of the overall range of evidence for housing provision in the plan.

2 Background

2.1 The publication of the 2022 based local authority projections was accompanied by commentary from the Chief Statistician¹. The update highlights that there have been some notable demographic changes in recent years in Wales, including an increase in both net international migration (the difference in the number of people moving in and out of Wales from outside the UK) and net internal migration (the difference between the number of people moving in and out of Wales from the rest of the UK). However, it is recognised that these figures have fluctuated substantially. There has also been a declining number of births, with the total fertility rate (the average number of children that would be born to a woman over her lifetime) at the lowest ever figure.

2.2 The Chief Statistician caveats that "*Population projections are not forecasts...they are calculated based on assumptions about latest trends in fertility, mortality and migration, and those assumptions are inherently uncertain.*"

2.3 The 2022 based projections employs a different methodology to previous projections. Principally international migration for the first two years of the projection period (2022-23 and 2023-24) has been constrained to known figures rather than being based on historic trends. Past trends have been used for subsequent years. In addition, household formation rates are modelled based on both changes between 2001 to 2011 and also between 2011 to 2021, with greater weight being applied to the latest data.

2.4 The Chief Statistician specifically states that the principal projections can be used to inform planning and decision-making, as they are based on the latest trends in fertility, mortality and migration but the full range of alternative projections should be used to understand the range of possible future scenarios and to reflect uncertainty. The projections should not be seen as forecasts of what will definitely happen, nor should be seen as strict upper or lower limits.

Principal Population Projections

2.5 The 2022 based population projections relate to the 25-year period 2022-2047. Over this period, the population of the Vale of Glamorgan is projected to increase by 27,829 people.

2.6 For the purposes of the RLDP, the plan period is 2021-2036. The table below sets out a comparison of the overall population projections for the Vale of Glamorgan for the 2018-based projections, the latest 2022-based projections and the 10-year dwelling led projection which forms the basis for the RLDP.

¹ <https://digitalanddata.blog.gov.wales/2025/11/20/chief-statisticians-update-new-local-authority-population-and-household-projections-published-today/>

Table 1: Population Change 2021-2036

Projection	Population change 2021-2036
2018-based	+9,797
2022-based	+18,882
RLDP (10 year dwelling led)	+13,154

2.7 The Housing and Employment Growth Background Paper explains that the RLDP projection reflects a moderate level of growth – it is higher than the 2018-based projection for the reasons explained in detail within the background paper but was not the highest projection considered, as the plan seeks to balance a number of priorities. This includes reflecting the Vale's position within a Future Wales national growth area and the significant need for affordable housing, whilst also ensuring that the level of growth is deliverable having regard to past delivery rates, accords with employment growth and is reflective of the environmental constraints within the Vale.

2.8 The 2022-based projections for the Vale are higher than both the 2018-based and RLDP projections. The projection period starts in 2022. However, if the Mid-Year Estimates (MYE) are used for 2021, the total population growth over the period 2021-2036 equates to 18,882, which is almost double that projected by the 2018-based projections. The statistical release² identifies that over the first 10 years of the projection period 2022-2032, the Vale's population is projected to increase by 9.9%, which is the third highest increase in Wales, behind Cardiff and Newport and significantly higher than the Wales figure of 5.9%. All local authorities are projected to grow, although for some authorities, the percentage growth is considerably lower.

² [Local authority population projections: 2022-based \[HTML\] | GOV.WALES](#)

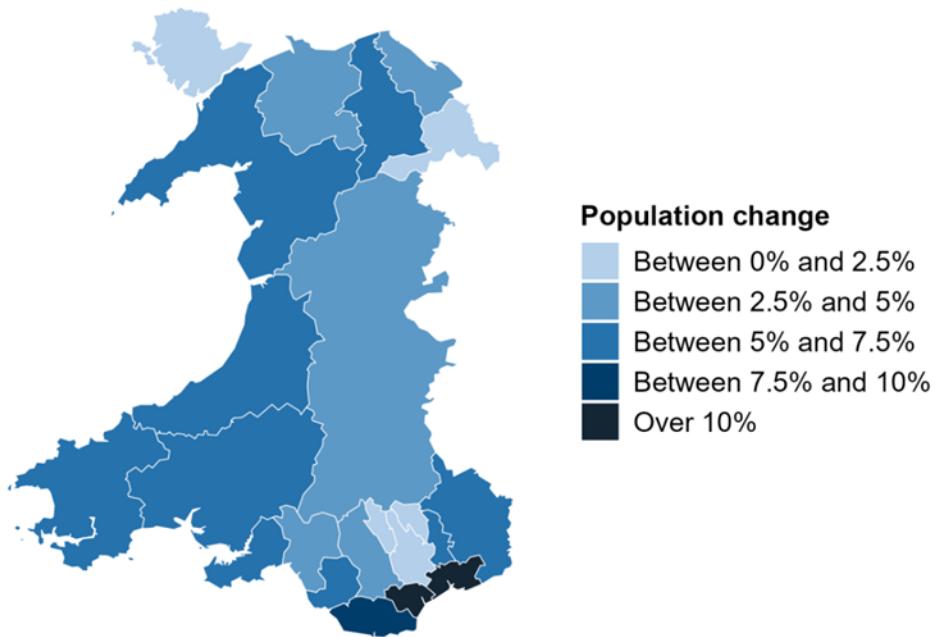


Figure 1 - percentage population change between mid-2022 and mid-2032 by LA

Source: Chief Statistician's update, November 2025

- 2.9 Notably, all LAs apart from Newport are projected to see a decline in the number of children aged 0-15 over the projection period, with the increase in population being in older age groups, including both the 65 or older and 75 or older cohorts.
- 2.10 When a comparison is made between the 2018-based and 2022-based population projections, 14 of the 22 local authorities have higher projections in the latest projections compared to 2018, with the Vale ninth highest.
- 2.11 Given the notable difference in the latest projections, it is important to understand why this is the case, having regard to the specific components of change.

Natural Change

- 2.12 The 2022 projections reflect the trends experienced over the five-year period prior to 2022. There are two elements to natural change – the number of births and the number of deaths. Considering births first, as shown in the table below, the 2022 based projections show a level of births that is lower than both the 2018 and RLDP projections. The lower figures may in part be due to a Covid 19 impact in the five-year period prior to 2022 as people delayed starting families during the pandemic. However, it is noted that the MYE births for the two years since 2022 are lower again at 1,147 in 2022-23 and 1,119 in 2023-24.

Table 2: Forecast births by projection

Projection	Forecast births per annum 2021-2036
2018-based	1,369 to 1,385
2022-based ³	1,252 to 1,309
RLDP (10 year dwelling led)	1,416 to 1,491

2.13 In terms of deaths, the 2022 based projections project a lower level of deaths per annum than either the 2018-based or RLDP projections. This is despite an ageing population. Data from the MYE is available for the first two years of the 2022-based projections, which shows the variable nature of the figures. In 2022-23 the number of deaths was higher than all three projections (1,483) but lower than all projections the following year (1,340).

Table 3: Forecast deaths by projection

Projection	Forecast deaths per annum 2021-2036
2018-based	1,437 to 1,701
2022-based ⁴	1,371 to 1,624
RLDP (10 year dwelling led)	1,447 to 1,711

2.14 When the two elements of natural change are considered together it will be noted that all three projections show negative natural change (more deaths than births) which is shown to follow a similar trajectory for all three projections. However, the projections used for the RLDP show a slightly more positive level of natural change (i.e. whilst natural change is negative, the level of decline is smaller). This is illustrated in Figure 2.

³ 2022-2036

⁴ 2022-2036

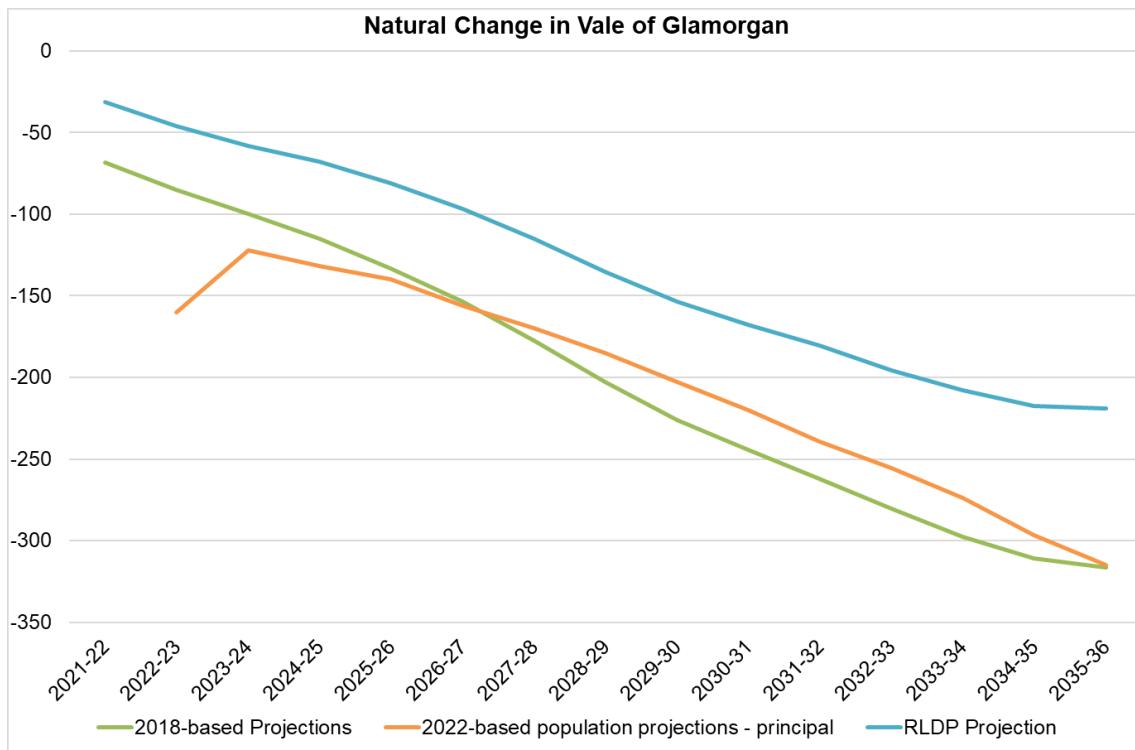


Figure 2 – Natural change in the 2018 based, 2022 based and RLDP projections

Migration

2.15 There are two elements considered in respect of migration – international migration (the net number of people moving to the Vale from outside the UK) and internal migration (the net number of people moving to the Vale from other local authorities within the UK).

2.16 As can be seen from the Figure below, net migration in the Vale has been variable. Net international migration was largely low over the adopted LDP plan period with several years with negative international migration. There was a notable increase in international migration in 2021-22 and this figure has been sustained in subsequent years.

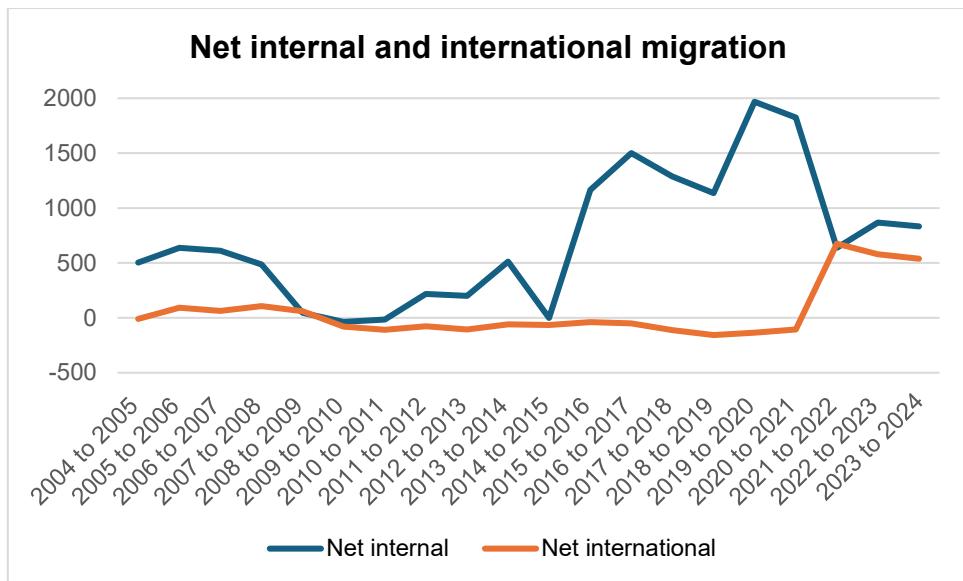


Figure 3 – Net internal and international migration in the Vale

2.17 Over the past 20 years, net internal migration has been largely positive in all years apart from 2009-2010 and 2010-2011. There has been a notable increase in net migration since 2015-2016, which largely corresponds to the adoption of the LDP 2011-2026 and associated increase in housebuilding. It is noted that there was a significant peak in 2019-20 and 2020-21. Whilst these were also years with high levels of housebuilding, this also corresponds with the Covid 19 pandemic. During the pandemic many students returned from their place of University to their homes and may have re-registered with local GP surgeries to entitle them to Covid vaccinations. As the Vale of Glamorgan does not have a University, it would have been affected by inward flows of students returning home in the area, but would not experience significant outward flows of students leaving the Vale. Since 2021-2022 the level of internal migration has dropped considerably compared to the high levels experienced in the two Covid 19 years.

2.18 The WG projections are based on past migration trends for the previous five years. In the five years leading up to the 2018-based projections (i.e., for mid-2013 to mid-2018), the five-year average for net internal migration in the Vale of Glamorgan was 893 people. In the five years leading up to the 2022-based projections (i.e., for mid-2017 to mid-2022), the five-year average for net internal migration was 1,371 people. As the five-year period is skewed by the pandemic trends, and peak levels of housebuilding, these figures should be viewed with caution. Consideration of variant projections, which include longer periods of migration, is therefore important.

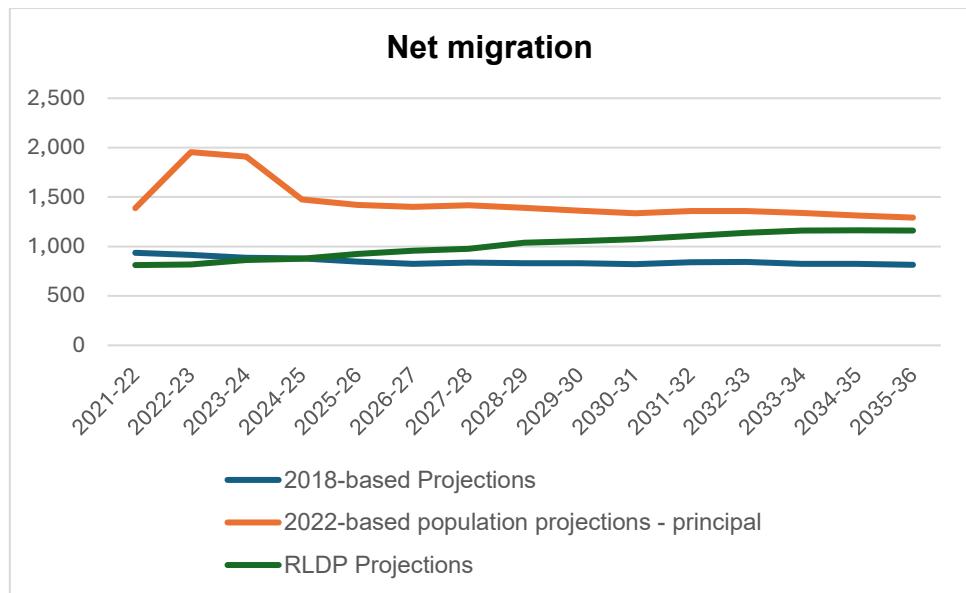


Figure 4 – Net migration assumptions in projections

Variant Projections

2.19 Alternative or ‘variant’ projections have also been published which consider alternative future scenarios of fertility, mortality and migration compared with the principal projection. They provide an indication of uncertainty, but do not represent upper or lower limits of future demographic behaviour.

2.20 The variants that have been published include 10-year and 15-year average migration, rather than the 5-years used in the main projection. It is caveated that users should consider the full range of variants when using the projections, to reflect the uncertainty in current and future migration patterns.

Table 4: Population change by variant projection

	2021 MYE	2022	2036	Difference 2021 to 2036
Principal projection	132,491	133,695	151,153	18,662
Lower population variant	132,491	133,695	149,262	16,771
Higher population variant	132,491	133,695	152,522	20,031
Ten year migration variant	132,491	133,695	146,117	13,626
Fifteen year migration variant	132,491	133,695	143,062	10,571
Zero migration variant	132,491	133,695	128,744	-3,747
RLDP projection	136,139	136,920	149,294	13,154

2.21 As discussed in the section above, the principal projections are reflective of the high level of migration that existing in the 5 years prior to 2022. The 10 year and 15-year migration variants are notably lower, reflecting longer trend trends in both internal and international migration. The 10-year migration figure is notably similar to the RLDP projection difference between 2021 and 2036.

Household Projections

2.22 The 2022-based household projections provide an indication of the future number of households, and their composition, based on population projections and assumptions about households from recent censuses.

2.23 Household projections are subject to uncertainty and are based on assumptions about future population and household composition. They are not forecasts, and do not attempt to predict the impact that future government policies, changing economic circumstances or other factors, such as the number of homes built, may have on the number of households. Instead, they indicate how many additional households would form if the population of Wales continues to change as it did between mid-2018 and mid-2022, and keeps forming households as it did between 2001, 2011 and 2021.

2.24 These household projections use data about household membership rates from the latest available censuses of the population and apply them to the latest local authority population projections.

2.25 The Statistical Release published alongside the household projections identifies:

- The number of households in Wales is projected to increase by around 98,500, or 7.2%, to 1.46 million, driven mostly by an increase in one-person households.
- The number of households is projected to increase in all local authorities.
- The local authorities projected to see the largest percentage increases in the number of households are the Vale of Glamorgan (up 11.7%) and Cardiff (up 11.1%).
- The number of one-adult households with no children is projected to increase the most of all household types.
- One-person households consisting of a person aged 60 years old or older are projected to account for almost three in five of all these households by mid-2032.

2.26 The RLDP housing requirement is based on a projected 7,587 households over the plan period, or 506 households per annum. Table 5 provides a comparison with the 2018 based household projections, as well as the 2022 based principal and variant household projections. To ensure appropriate comparison over the plan period, the 2021 household estimates have been used to calculate an appropriate starting point for the 2022 based projections.

Table 5: Households 2021-2036 by variant

	2021-2036	Average per annum
RLDP	7,587	506
2018-based household principal projections	6,214	414
2022-based household principal projections	9,623	642
Low Population Variant	9,032	602
High Population Variant	10,041	669
10-Year Migration Variant	7,560	504
15-Year Migration Variant	6,234	416
Zero Migration Variant	578	39

2.27 As shown in Table 5 and explained in the Housing and Employment Growth Background Paper, the RLDP projection is higher than the 2018 based household projection, reflecting the policy context and past housing completion rates.

2.28 The 2022-based principal household projections are higher than the RLDP projections, due primarily to the underlying population projections being higher. As explained in the previous section, there are concerns about the migration assumptions that inform the 2022-based projections given the short-term nature of the assumptions and the impact of the Covid 19 projections on the figures.

2.29 The 2022-based household projection growth over the plan period equates to an average of 642 households per annum, or 666 dwellings per annum when households are converted to dwellings with a vacancy rate of 3.8% factored in. This is significantly higher than the RLDP housing requirement of an average of 526 dwellings per annum, and higher than what has been achieved over the previous plan period. There would therefore be real concerns about the deliverability of a housing requirement based on these projections.

2.30 Given the concerns about the short-term migration assumptions, consideration should be given to the variant projections. It will be noted that the 10-year migration variant, which is considered to be a more appropriate timeframe against which to assess migration, is broadly similar to the RLDP projection, with the 15-year projection being lower.

3 Conclusion

- 3.1 The RLDP housing requirement is based on a dwelling led projection and is set at a level that is demonstrated to be deliverable, reflecting housing completions over a 10-year period, whilst balancing environmental capacity with affordable housing need. The 2022-based principal population and household projections for the Vale of Glamorgan are higher than both the 2018-based projections and the RLDP.
- 3.2 National planning policy is clear that it is important to consider a range of evidence when setting housing requirements for the RLDP. If the 2022 projections are considered in isolation without full scrutiny of the assumptions behind them, then this may imply that the RLDP should be seeking a higher level of growth. However, it is clear from the assessment of the evidence and the advice of the Chief Statistician that this is not the approach that should be taken, as *“users should consider the full range of variants when using the projections, to reflect the uncertainty in current and future migration patterns.”*
- 3.3 The projections for the Vale show significant variation in internal migration in particular and therefore should be treated with caution. The projections are trend based and are therefore affected by specific factors that may have occurred within the previous 5 years. The 5 years in question included a period of high housebuilding associated with a newly adopted LDP, as well as the Covid 19 pandemic, where many students returned to home from term-time addresses and re-registered with GPs in the Vale.
- 3.4 Given the fluctuation in recent migration figures, consideration of longer-term trends is appropriate, and it is noted that the population change identified in the 10-year migration variant in particular is of a similar level to that proposed under the RLDP projection.
- 3.5 In conclusion, for the reasons identified above, despite the updated projections, the RLDP housing requirement continues to represent a robust basis to deliver a sustainable and deliverable level of growth over the plan period.



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