

Demographic projections...in brief

January 2024

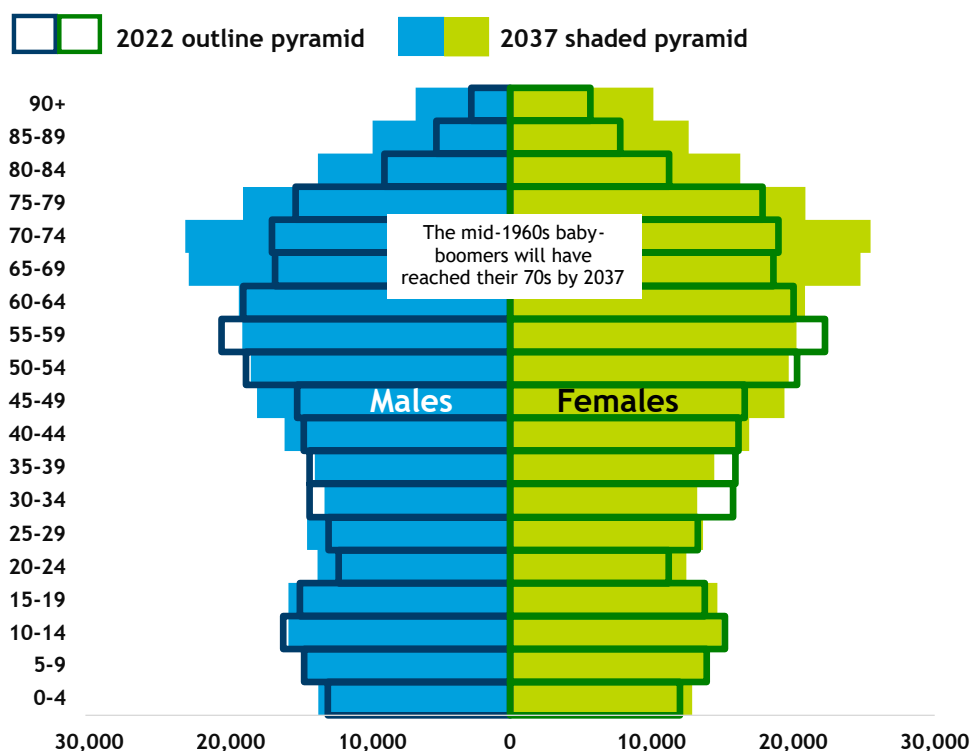
Population projections provide an indication of the future size and age structure of the population. These projections are based on the latest mid-year population estimates which were released in November 2023, when the ONS also released rebased estimates and components of change for the period 2012-2021, following the 2021 Census. They also use a set of assumptions of future fertility, mortality and migration. They are dwelling-led demographic projections based on planned housing figures provided by the districts and boroughs as at winter 2023.

The East Sussex population is projected to grow by nearly 66,000 in the next 15 years, with a large increase in the number of people aged 60+, comparing to little change in younger age groups. Wealden is projected to see the most growth, based on the planned level of housing. The number of households is projected to grow faster than the population, as household size continues to decline.

550,700
Population in 2022

616,300
Projected population in 2037

Fig. 1: East Sussex population in 2022 and 2037, by age and sex

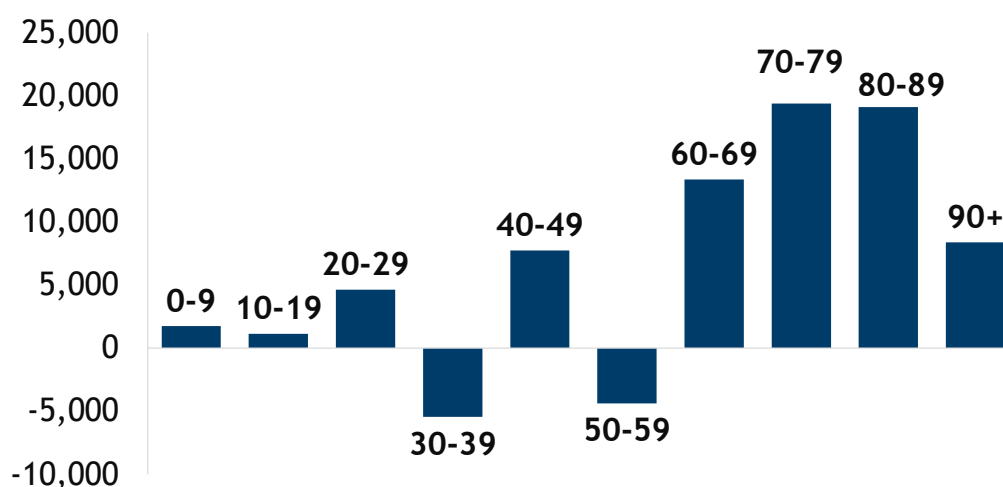


Key points

- The population of East Sussex is projected to increase by 65,700 to 616,300 between 2022 and 2037. The number of households is expected to increase by 16.1%, while the population is projected to increase by 11.9%, over this 15 year period, as average household size declines from 2.19 people per household in 2022, to 2.10 in 2037.
- The over 65s are projected to see the largest increase in numbers over the projection period, 2022-2037, as the population continues to age. This will be exaggerated because ‘baby boomers’ born in the mid-1960s will be in their 70s by 2037, and those from the post-war baby boom will be in their late 80s/90s.
- The over 65s now represent a quarter of the county’s population and are projected to make up a third of all people by 2037. All elderly age groups are expected to increase in size (see pyramid previous page), with the number of very elderly people aged 85 and over expected to increase by 73%, from around 21,400 in 2022 to 39,100 in 2037.
- In Rother, which had the highest proportion of over 85s of all lower tier authorities in the country in 2022, older people (aged 65+) are expected to make up more than 40% of the population in 2034 (up from 33% in 2022). The proportion of over 85s in Rother is forecast to rise from 4.9% to 7.8% in 2037.
- The number of households is forecast to increase by 16.3%, from 246,300 in 2022 to 286,500 in 2037, with the largest increases among older households, and those with only one person.
- The workforce (the number of economically active people aged 16-74) is projected to rise by 3.6% over the 15 years from 2022 to 2037, and increase of 9,100 to 261,800 in 2037.

Age groups

Fig. 2: Projected actual change in numbers between 2022 and 2037 - 10-year age groups



- There is expected to be a very small rise in the number of children and young people aged 0-17 (up 1.6%), but the overall population of women of childbearing age (15 to 44) is expected to fall overall between 2022 and 2037, by 1.6%, although it is projected to rise until 2031, and then decline as we approach the end of the period.
- The model projects that there will be a small rise in the working age population (18-64) of 1.6%, from 302,530 in 2022 to 307,430 people in 2037. There are forecast to be rises among the 20-24 age group (up 11.7%) and the 25-30 group (+7.3%), but declines among those aged 30-34 (down 11.9%) and the 35-39 group (-6.3%).
- Among the middle-aged, a rise is projected among the 40-44 group (up 6.8%) and a larger rise among those aged 45-49 (up 17.9% over the 15 year period), but declines among those in their 50s: the 50-54 age group is projected to decline by 2.4% and the 55-59 group may fall by 8.1%, (see chart on previous page) as the population numbers from the baby-boom in the mid-1960s get older, and are followed by a generation with fewer people.
- The number of older people aged 65 and over in the county is projected to increase from 145,450 in 2022 to 204,530 in 2037, an increase of 59,090, or 40.6% (note rounding). Numbers in the oldest age group (aged 85+) are projected to increase most significantly, by 83% over the 15 years from 2022-2037, and increase of 17,700.

Change between 2024 and 2028

- When looking at a shorter time frame, the pattern of projected changes over the next few years is slightly different. Over the period 2024-2028, the population is projected to increase by 3.9%, rising from 558,400 in 2024, to 580,300 by 2028. The largest increase is forecast to be among the oldest age group, with the number of over 85s increasing by 14.2% to 26,000.

Table 1: Projected population in East Sussex in 2024 and 2028, by age group

	2024	2028	Actual change	% change
0-17	103,900	104,800	900	0.9%
18-64	303,000	307,900	5,000	1.6%
65-84	128,800	141,500	12,800	9.9%
85 and over	22,800	26,000	3,200	14.2%
Total	558,400	580,300	21,900	3.9%

Median age

- The average (median) age of East Sussex residents is forecast to rise to 51 years and 3 months in 2037, from 48 years and 4 months in 2022 as the population continues to age.

Children and young people aged 0-17



- The population of children and young people in East Sussex is projected to rise by 1.6% over the period 2022-2037, from 102,700 to 104,400, an increase of 1,600 children.
- When we look at the shorter period from 2024-2028, the population of children and young people is projected to rise by 0.9%, from 103,900 to 104,800, a rise of 900.
- Although there is expected to be a very small rise in the total number of children and young people aged 0-17 (up 1.6%), the overall population of women of childbearing age (15 to 44) is expected to fall overall between 2022 and 2037, by 1.6%, although it is projected to rise until 2031, and then decline as we approach the end of the period.

Fig. 3: Projected population of children and young people aged 0-17, 2022-2037

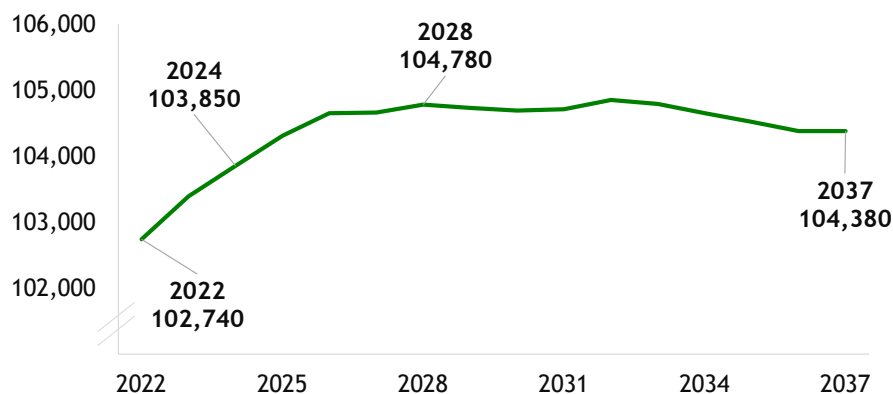
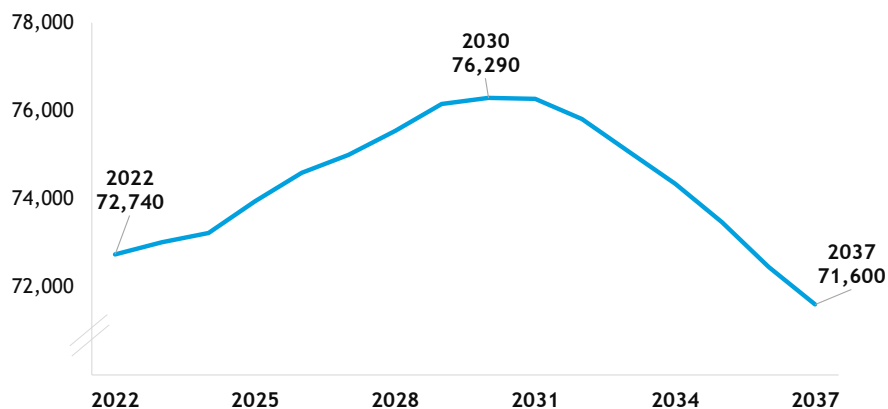
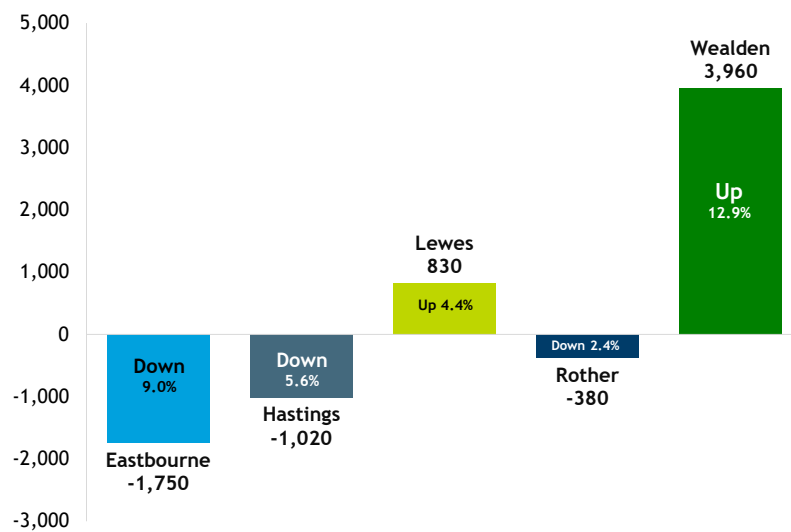


Fig. 4: Population of females aged 15-45, 2022-2037



- Looking at the number of households with children, there will be very little change over the 15 years 2022-2037, with an overall increase of 0.7%, from 58,200 to 58,600. The number of households with two children will grow most, by 1.6%, from 21,300 to 21,700, with very marginal rises projected among households with 1 child and 3 or more children.
- Whilst the total number of 0-17 year olds is expected to grow slowly in East Sussex (by 1.6%) between 2022-2037, there will be a large variation between the districts.

Fig. 5: Projected change in the number of children aged 0-17 by district, 2022-2037

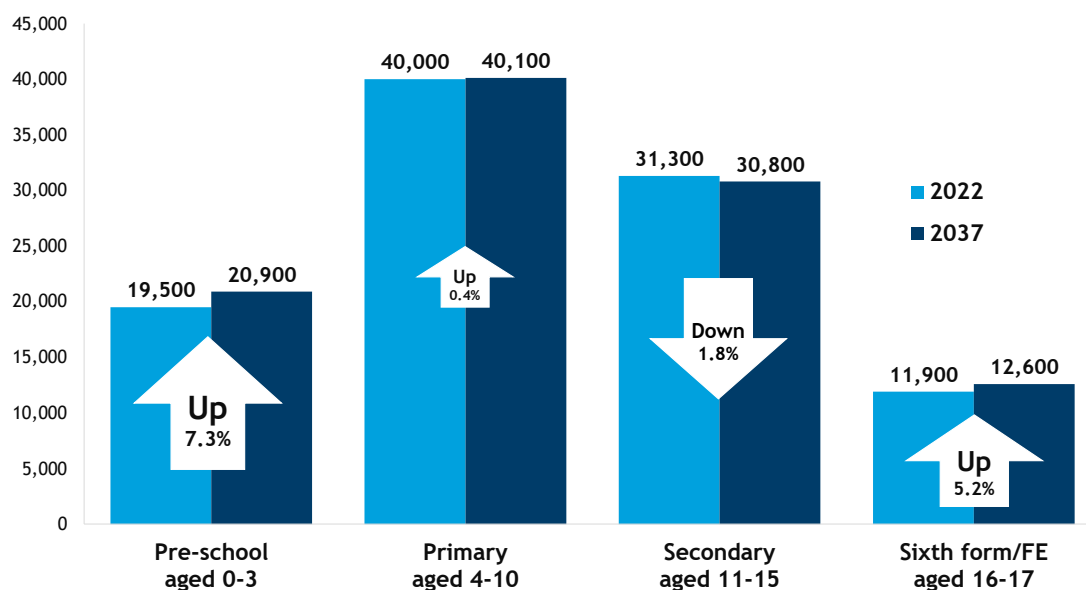


- Wealden is the only district in East Sussex likely to see a significant increase in the number of children and young people between 2022 and 2037, with a projected increase of 12.9% (nearly 4,000 children) over this period. A modest rise is also projected for Lewes, of 4.4% (830 children).
- Eastbourne is expected to see a significant fall of 9.0%, with smaller falls in Hastings (-5.6%) and Rother (-2.4%) over the 15 years.

Detailed age groups

- The number of pre-school aged children (aged 0-3) is projected to see the biggest rise, of 7.3% (1,400) over the period from 2022-2037.
- Overall numbers of school-age children (aged 4-15) are expected to fall by 0.6% over the 15 years 2022-2037. While secondary age numbers are expected to fall by 1.8% (500), there is projected to be a very slight rise in primary aged numbers of 0.4% (100).
- Among Sixth form/FE aged young people (aged 16-17) there is projected to be a rise of 5.2% (700) over the 15 years

Fig. 6: Projected population change among children and young people in East Sussex, by age group, 2022-2037



- When looking at the period 2024-2028, there is projected to be an increase of 900 (0.9%) from 103,900 to 104,800 in the number of children aged 0-17.
- But while the number of those aged 0-3 is projected to see a rise of 3.0% (590), and 16-17 year olds are projected to increase by 6.2% (790), there are projected to be falls among those aged 4-10 (a slight fall of 0.1% or 50 children) and a larger decline in 11-15 year-olds of 1.3% (down 400) over the 5 year period 2024-2028.

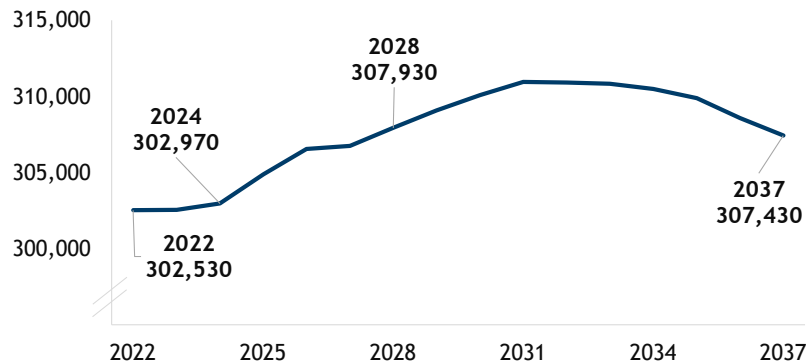
Table 2: Projected population of children in East Sussex by age group, 2024-2028

	2024	2028	Change 2024-2028	% change 2024-2028
0-3	19,850	20,430	590	3.0%
4-10	39,460	39,410	-50	-0.1%
11-15	31,770	31,380	-400	-1.3%
16-17	12,770	13,560	790	6.2%
0-17	103,850	104,780	930	0.9%

Working-age people (aged 18-64)

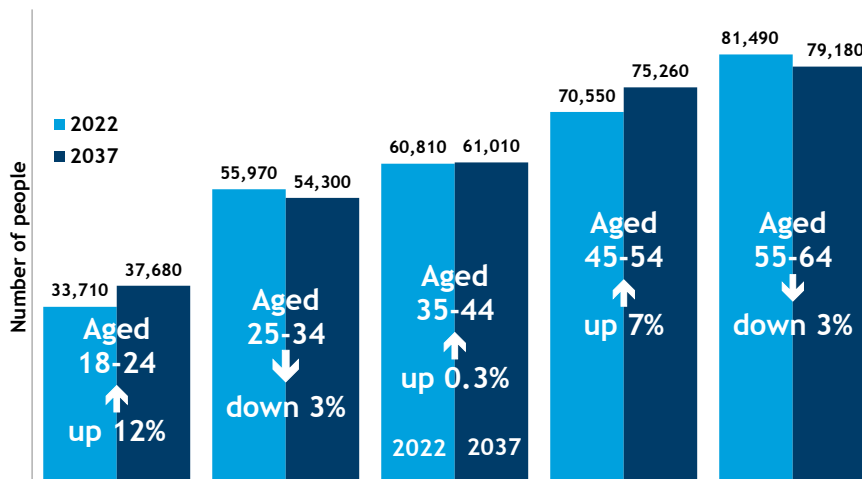


Fig. 7: Projected population of working-age people (aged 18-64), 2022-2037



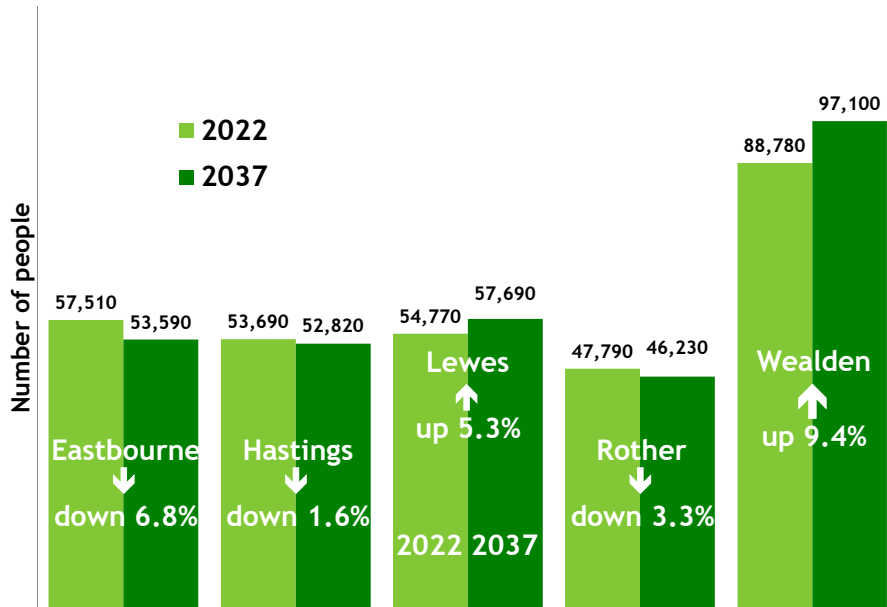
- The model projects that there will be a small rise in the working age population (18-64) of 1.6% or 4,890, from 302,539 in 2022 to 307,430 people in 2037. There will be declines among some younger people, aged 25-34 (down 3.0%), and among the middle-aged 55-64 (down 2.8%), but this figure masks a decline in the 55-59 age group of 8.1%, and a rise among those aged 60-64 of 2.9%, as the population numbers from the baby-boom in the mid-1960s get older, and are followed by a generation with fewer people.
- There are projected to be increases among those aged 18-24 (up by 11.8%) and 45-54 age group (up 6.7%), while there is projected to be little change in the 35-44 age group (up 0.3%)

Fig. 8: Projected working-age population by age group, 2022-2037



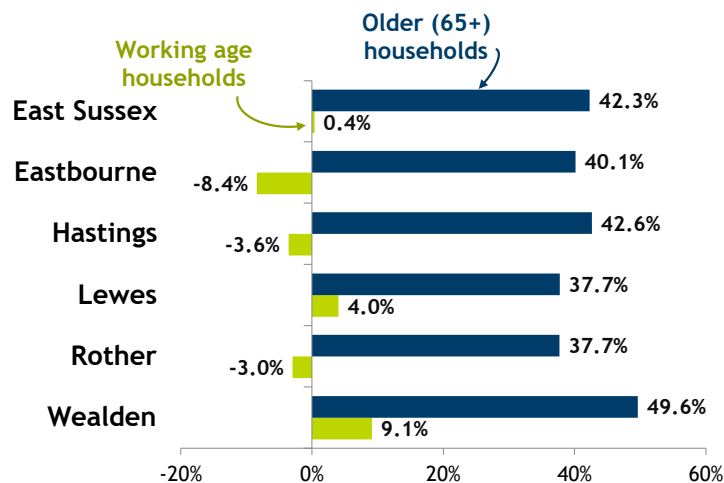
- While the number of working age people in Wealden is predicted to increase by 9.4% in the period 2022-2037, and in Lewes by 5.3%, there is forecast to be a significant decline in Eastbourne (down 6.8%), and decreases in Rother (down 3.3%) and to a lesser extent Hastings (1.6%).

Fig. 9: Population of working age (18-64) by district, 2022 and 2037



- The number of households headed by people of working age (16-64) is set to increase by just 0.4%, slightly slower than the increase in population, and compares to a projected rise of 42.3% among households headed by older people (aged 65+) over the same period.
- Within the working age (16-64) group, “Other” households are projected to grow the most, but only by 0.8%. Single male households are expected to grow by 0.6%, and single female households by 0.2%. The number of working age households with children is projected to remain stable over the 15 years in the county.

Fig. 10: Percentage change in number of households by age group, 2022-2037



- When looking at the period 2024-2028, there is projected to be an increase of 4,960 (1.6%) from 302,980 to 307,930 in the number of working-age people aged 18-64. But while the number of those aged 18-24 is projected to see a rise of 11.2% (3,710), there is projected to be a slight fall among those aged 25-44 (down 820 or -0.7%), and only a very moderate rise among those aged 45-64 (up 2,060, 1.3%).

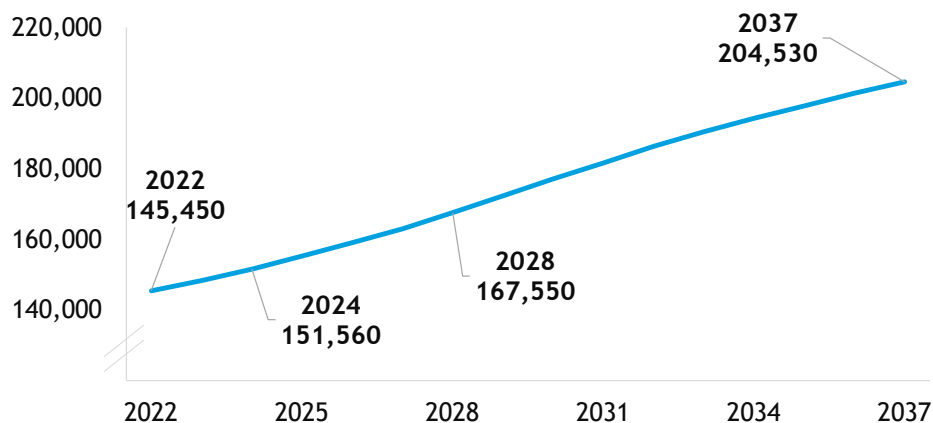
Table 3: Projected population of working age people in East Sussex by age group, 2024-2028

	2024	2028	Change 2024-2028	% change 2024-2028
18-24	33,210	36,920	3,720	11.2%
25-44	117,110	116,290	-820	-0.7%
45-64	152,660	154,710	2,060	1.3%
18-64	302,970	307,930	4,960	1.6%

Older population (aged 65 and over)

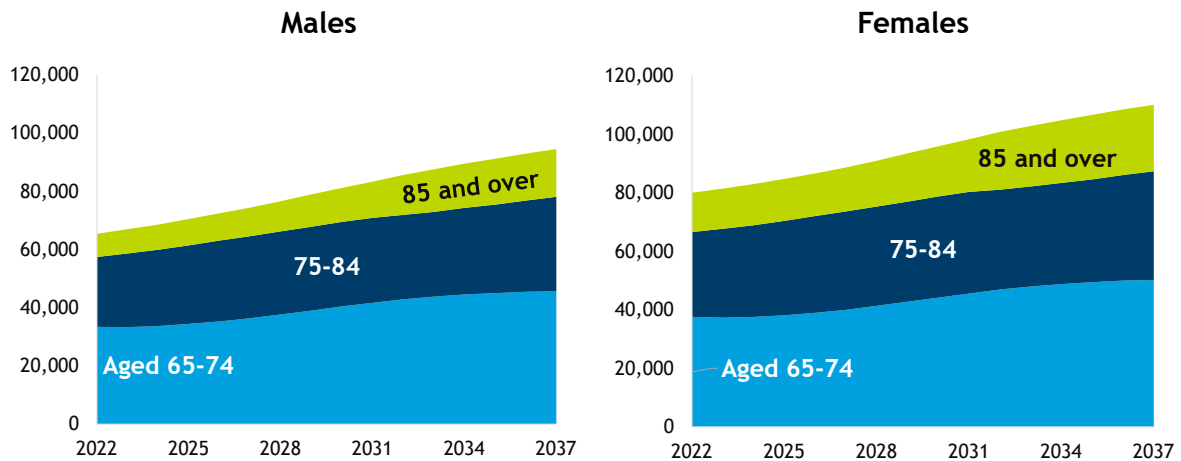


Fig. 11: Projected population of older people aged 65 and over, 2022-2037



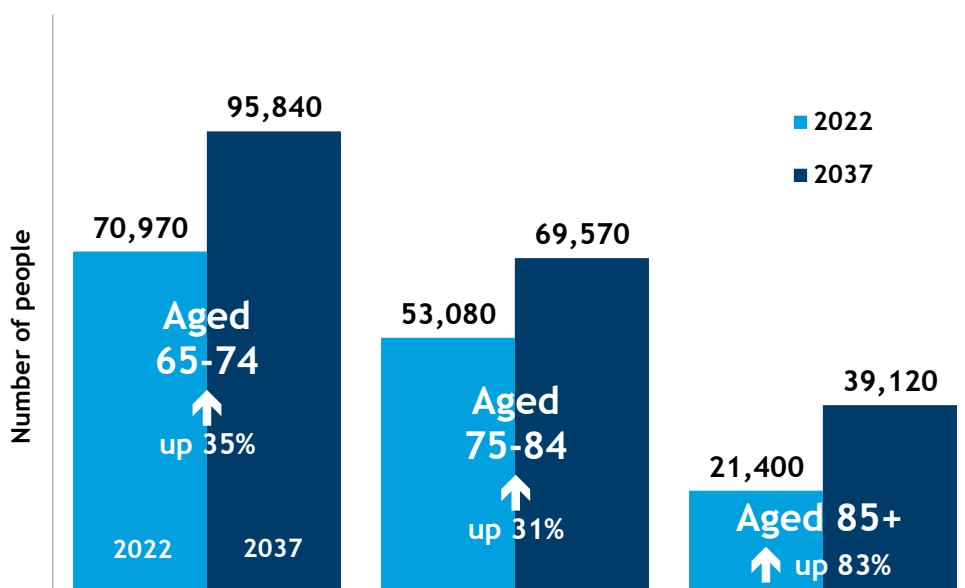
- The number of older people aged 65 and over in the county is projected to increase from 145,450 in 2022 to 204,530 in 2037, an increase of 59,090, or 40.6% (note rounding).
- The number of men aged 65+ is projected to rise by 45% (29,090) to 94,480, while the number of women is projected to increase by 38% (30,000) to 110,060.

Fig. 12: Projected population of older people aged 65 and over, males and females, 2022-2037



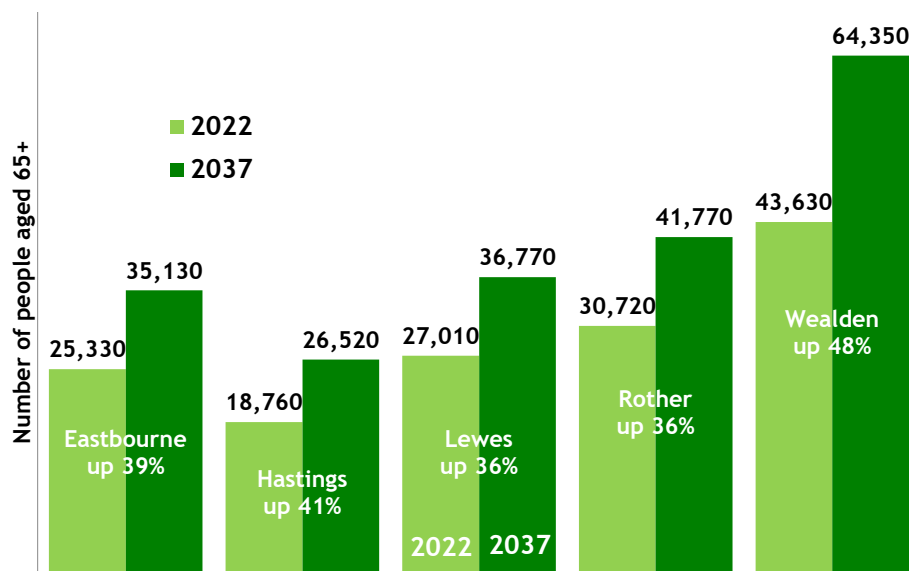
- Numbers of the oldest group (aged 85+) are projected to increase fastest, by 83% over the 15 years from 2022-2037, and increase of 17,700, as the postwar baby boomers reach their mid-80s. This change will be most acute among the oldest men with an increase of 106% (8,400) among men aged 85+ compared to a 69% (9,300) rise among women aged 85+.
- There is also forecast to be double the number in the very oldest group (aged 90 and over), from 8,400 in 2022 to 16,800 people in 2037. As the population of older men rises, there will be 3,900 more males aged 90+ (up 144%), and 4,400 more females (up 78%).
- Other older age groups will also increase steeply, with the 65-74 age group projected to increase by 35%, and 75-84 year-olds projected to rise by 31% over the 15 year period.

Fig. 13: Projected older population by age group, 2022-2037



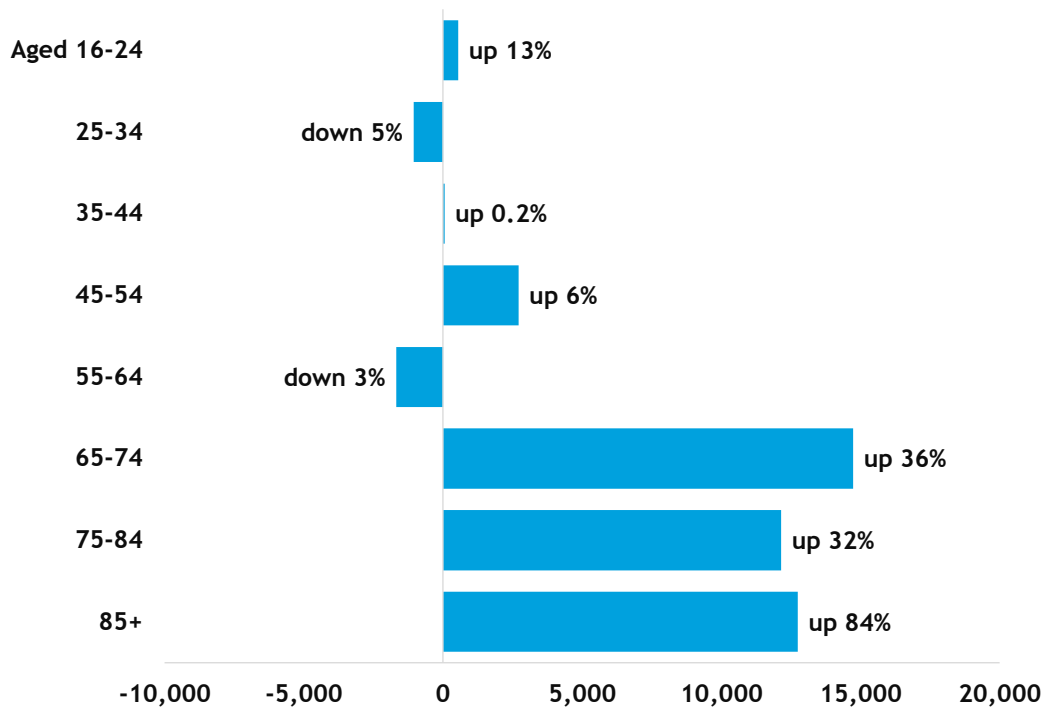
- Wealden is projected to see the fastest rise in the population of older people aged 65 and over among the districts, with a rise of 48% over the 15 years from 2022-2037. Hastings will see the second largest increase of 41%.
- Wealden will also see the largest rise among the very old with an increase of 96% (5,800) among the over 85 group.
- The increases in Eastbourne (39%), Lewes and Rother (both up 36%) in the period 2022-2037 will also be very significant, especially when compared to the changes among other age groups.
- In 2022, one third of Rother’s population (33%) were aged 65+, ranking second highest of all districts/UAs in the country (just behind the district of North Norfolk). This is projected to increase to 40% of the population by 2037, with 7.8% of the population projected to be 85 and over in Rother by that time.
- Just 21% of Hastings population was aged 65+ in 2022, but even here, the proportion is forecast to rise to 28% in 2037.

Fig. 14: Projected older population (aged 65+) by district, 2022-2037



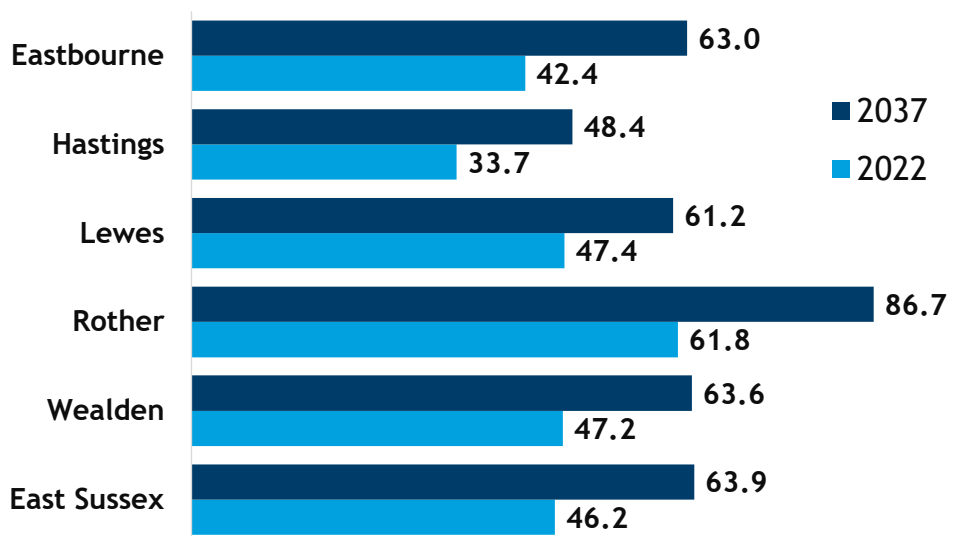
- While the total number of households is projected to increase by 16.3%, from 246,300 in 2022 to 286,500 in 2037, the number of older households (aged 65 and over) is forecast to increase by 42.3%, from 93,700 to 133,400 in 2037, an increase of 39,600.
- The largest increase in older households is projected to be in Wealden, where older household numbers are projected to rise by 50% from 27,860 to 41,670.
- But all the other districts are also projected to see large rises in older household numbers, with Hastings projected to see a rise of 42.6% from 12,240 to 17,450. (see chart on page 12).

Fig. 15: Change in household numbers by age in East Sussex, 2022-2037



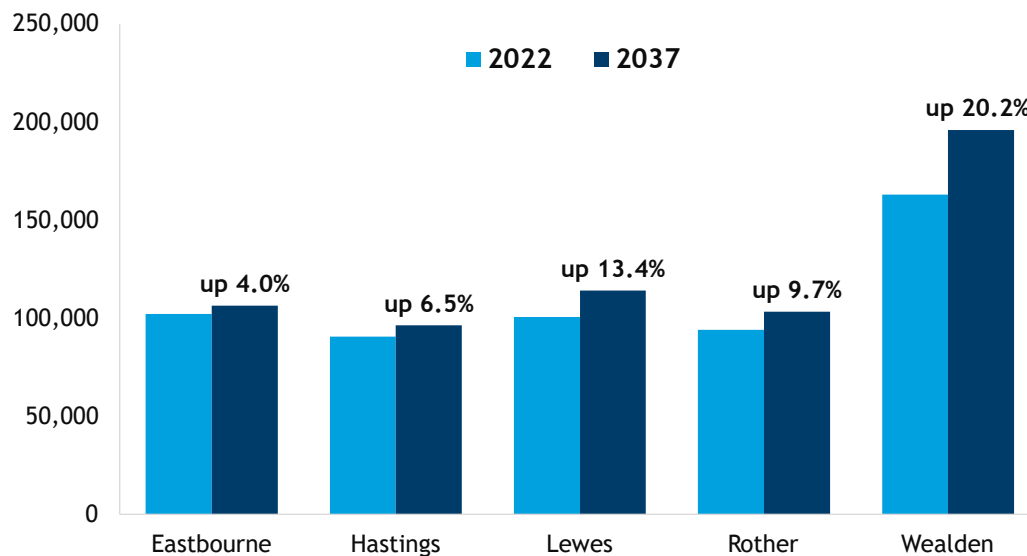
- As the older population rises, there will be little change in the working age population. This means that dependency ratios for all dependents and for older people will rise significantly. The change in the elderly dependency ratio will be most significant in Rother where the ratio will rise from 6.2 in 2022 to 8.7 older people aged 65+ for every 10 working age people (aged 16-64) in 2037.

Fig.16: Number of dependents aged 65+ per 100 working age people, 2022 and 2037



Districts

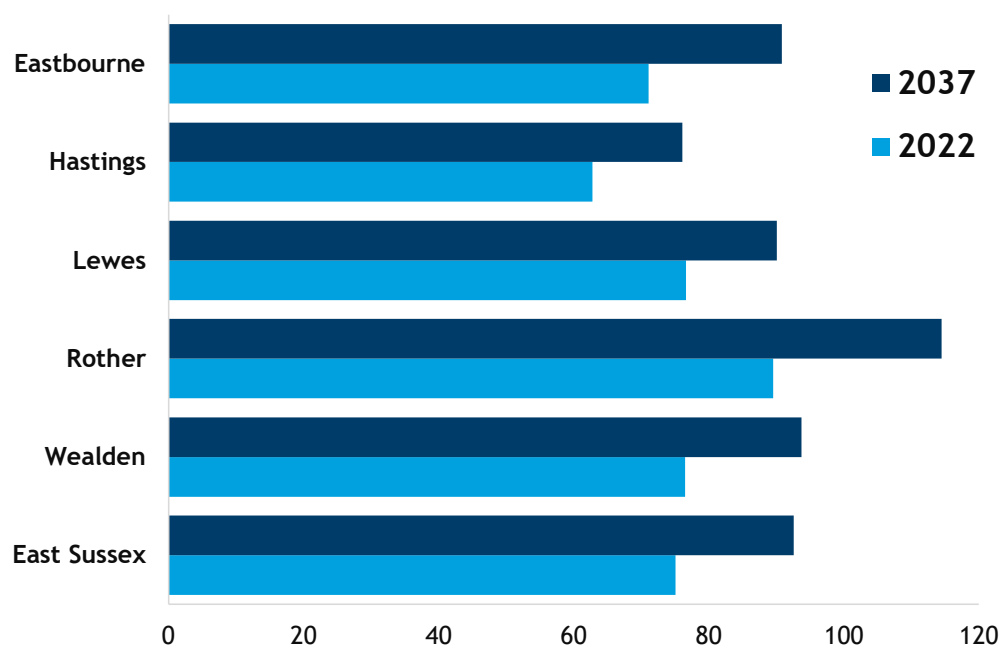
Fig. 17: Projected total population in East Sussex districts, 2022-2037, with projected change



- The population is projected to increase in all districts, but the largest rise is forecast in Wealden, (20.2%) where substantial new housing development is being planned.
- There are also forecast to be significant rises in Lewes (13.4%) and Rother (9.7%), but more moderate increases in Hastings (6.5%) and Eastbourne (4.0%) over the projection period from 2022-2037.

Dependency Ratios

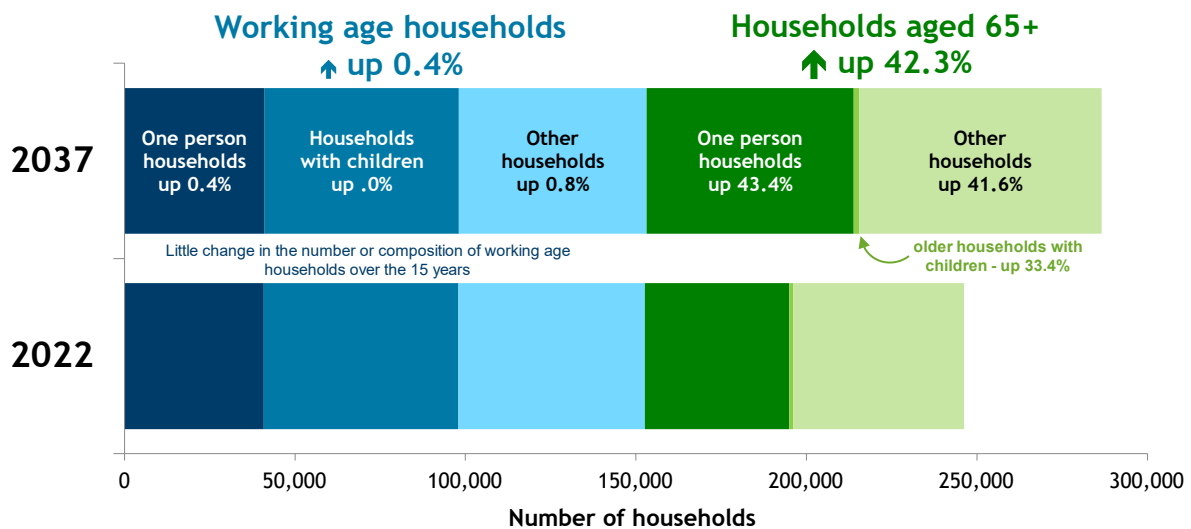
Fig. 18: Dependency ratios in 2022 and 2037 - districts



- The overall dependency ratio (the number of dependents for every 100 working age people, aged 16-64) is expected to rise to 93 in 2037, from 75 in 2022. For elderly people, in 2037 there are projected to be 64 people aged 65+ for every 100 of working-age, up from 46 in 2022. This change will be most extreme in Rother where the ratio will rise from 62 in 2022 to 87 in 2037.

Household projections

Fig 19: Household numbers in East Sussex by age and household type, 2022 and 2037



- Over the period 2022-2037, the number of households in East Sussex is projected to increase by 16.3%, faster than the 11.9% growth in population expected for the same period. This is mainly because the average number of people living in each household (household size) is expected to fall from 2.19 in 2022 to 2.10 in 2037.
- Of all household types, One-person households are expected to increase by the largest proportion (22% - 18,500 more households) by 2037. 'Other' households, which includes couples without children and other types of adult-only households, are expected to increase by 20% (21,300 more), reflecting predicted changes in how people will live, with more shared households and adult children staying with parents.
- While the number of households is projected to increase by 16.3%, from 246,300 in 2022 to 286,500 in 2037, the number of older households (aged 65 and over) is forecast to increase by 42.3%, while middle aged households (aged 45-64) will barely change in number (up 1.1%).
- The number of households headed by those aged 35-44 is also projected to change very marginally (up 0.2%), and the number of households headed by younger people aged 15-34 is expected to decline by 1.9%.
- Single female households and single male households are also expected to see large increases, of 24% and 19% respectively - but this increase will occur mainly among older households (40% increase in households aged 65 and over - 38% increase in

females and 46% increase in males), with little change in the number of single working age households (up 2.4%).

- Over the period 2022-2037, the total number of families children are projected to rise by 0.7%. Households with two children are projected to increase by 1.6%, but the number of households with one child are projected to rise by just 0.1%, and households with three or more children by only 0.3%.

Table 4: Average household size

	2022	2037
Eastbourne	2.14	2.04
Hastings	2.09	2.01
Lewes	2.24	2.16
Rother	2.13	2.01
Wealden	2.29	2.19
East Sussex	2.19	2.10

Table 5: Projected population change, 2022-2037

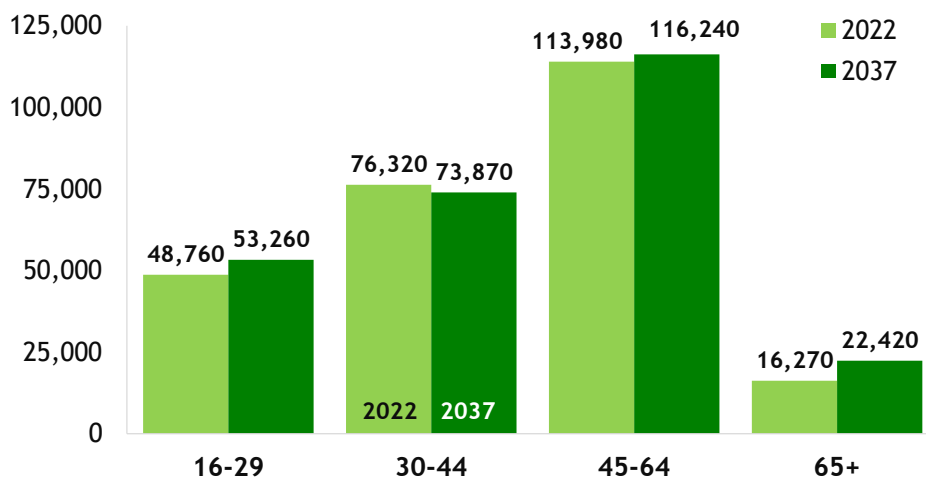
	2022	2037	Change 2022-37	% change 2022-37
Eastbourne	102,200	106,400	4,100	4.0%
Hastings	90,600	96,500	5,900	6.5%
Lewes	100,700	114,200	13,500	13.4%
Rother	94,200	103,300	9,100	9.7%
Wealden	163,000	196,000	33,000	20.2%
East Sussex	550,700	616,300	65,600	11.9%

Table 6: Projected household change, 2022-2037

	2022	2037	Change 2022-37	% change 2022-37
Eastbourne	46,600	50,700	4,100	8.8%
Hastings	42,600	46,700	4,100	9.7%
Lewes	44,200	51,800	7,600	17.2%
Rother	43,100	49,800	6,800	15.7%
Wealden	69,800	87,500	17,600	25.3%
East Sussex	246,300	286,500	40,200	16.3%

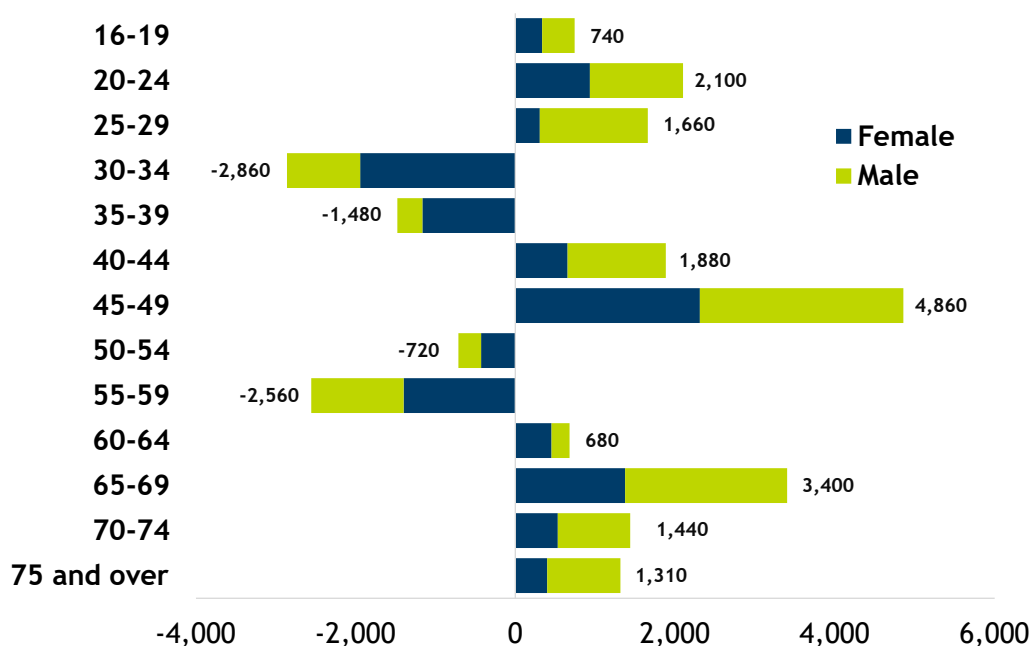
Labour force projections

Fig. 20: Workforce projections for East Sussex by age group, 2022-2037



- The labour force (economically active people aged 16-74) is expected to increase by 3.6% (by 9,140) to about 261,800 people in 2037, but although there is only projected to be a small rise, of 1.7%, in younger workers up to age 59, there is expected to be a 15% increase in the labour force aged 60-74, reflecting changes to pension ages and increasing female participation in the workforce as well as rising numbers of older people due to the ageing of the baby boom generations.
- When we look at detailed age groups (see next page) the largest rises are projected among the oldest age groups (aged 65-69 - up 3,400) and the 45-49 age group (up 4,860), with smaller rises among the youngest workers (aged 16-29) and a decline among the 30-39 age group and big falls among those aged 55-59 (down 2,560).

Fig.21: Actual change in labour force numbers by detailed age group and sex, 2022-2037



- However, the overall rise masks differences between changes to the male and female workforce, with males increasing by 7,200 (up 5.5%), compared to a rise of 1,950 (up 1.6%) among females.
- Note that the Labour force projections include all economically active people aged up to 74.

Further information

The demographic projections are produced by the East Sussex County Council (ESCC) Research and Intelligence team, Governance Services, at county and district levels, using the POPGROUP model. The model is based on a ‘cohort component method’, where the starting point is an existing estimate of the population which is projected forward taking account of the impact of births, deaths and migration (within the UK and international migration) as well as the number of extra units of housing being planned for the future (‘dwellings-led’ - see detailed explanation below)). Assumptions about future fertility, mortality and migration trends are derived from recent historical evidence, and the latest housing provision figures are provided by districts and boroughs giving estimated trajectories for when housing will be built.

The latest 2022-based ESCC projections are based on the mid-2022 population estimates released by ONS in November 2023. The ONS also substantially revised the mid-year estimates for the period 2012-2021 and all the components of change with this release, so previous migration trends have been superseded.

They also include the household formation rates from the 2018-based Household Projections released by ONS in June 2020 (these have not yet been updated by the ONS to reflect the results of the 2021 Census). ONS have changed the way couples and other households were categorised. Couples with no children living by themselves with no others are now grouped with all other households with no dependent children, with more than one adult, including family households with adult children or other relatives living with the main householder and non-related groups of sharers, who may be couples or single people. All of these types of household are now in the group labelled ‘other households’.

Data from the 2001, 2011 and 2021 Censuses is used in the model to provide household/dwelling conversion rates and economic activity rates.

These projections also differ from previous ESCC projections released in April 2022 because of substantial revisions to the mid-year population estimates, including changes to migration estimates released in November 2023, and revised house-building trajectories provided by the districts and boroughs in Spring 2023.

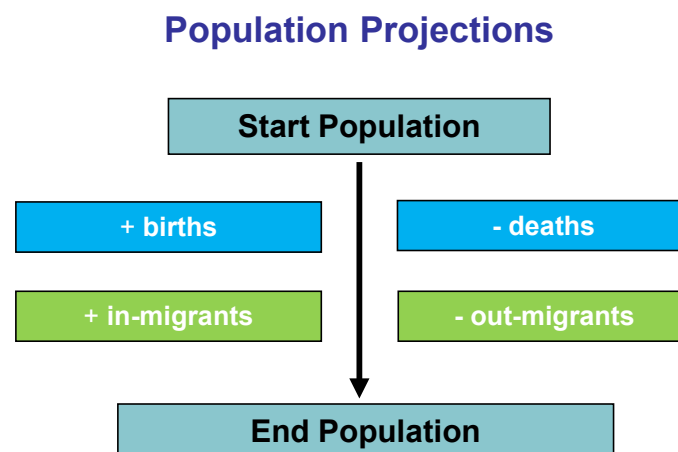
The state pension age is currently 66 for both men and women and now increases every few months, reaching 68 by November 2037. In this analysis ‘pensioners’ and ‘older people’ are assumed to be all those over the age of 65, right up to 2037. In the workforce projections, all economically active people up to age 74 are included.

Covid-19 and the effect on future populations

The Coronavirus crisis which began in 2020 had a significant impact on the East Sussex population, with more than 2,000 deaths due to the disease in the county, and a number of other effects on internal and international migration patterns, and the labour market. The data used in the model is the latest ONS 2022 mid-year estimates, which included substantial revisions for the period 2012-2021, and includes the death rates for the period 2020-2022, when the pandemic had the most impact on the number of deaths and other behaviours.

Methodology

These population projections are based on a cohort component method, where the starting point is the existing estimate of the population, by single year of age and gender, in a particular area. The projection for the first year is produced by ageing on the estimated population by one year, adding births and subtracting deaths and adjusting for migration (either by adding on inflows and subtracting outflows or simply adding on a projected net flow - see illustration below).



The starting population is therefore projected forward, one year at a time, taking account of the impact of births, deaths and migration (internal and international migration). Assumptions about future fertility, mortality and migration trends are derived from recent historical evidence from the ONS components of change released with the latest mid-year population estimates (2022 estimates released in November 2023).

We have assembled some more up-to date data to give readers some additional information which may affect how they use these projections.

Deaths

In the year to end June 2022, there were a total of 6,873 deaths registered in East Sussex. This was lower than the pandemic years of 2020 (7,047) and 2021 (7,355) but considerably higher than the average of 6,600 deaths per year for the period 2015-2019.

Births

The number of births has been in decline for a number of years, and was at its lowest since at least 1991 in the year to mid-2021 when there were 4,453 births. The number rose slightly in 2022, to 4,519, but is still very low. Since 2011, around 15% of births in the county have been to women born outside of the UK. This means that when there are changes to international migration this is likely to affect birth rates.

Internal migration

It has been suggested that changes to work styles due to the pandemic, particularly the ability to work from home, might have resulted in more people migrating from urban areas to quieter, more rural areas, such as many parts of East Sussex. The components of change which accompanied the revised ONS mid-year estimates, released in November 2023, estimated that in the year to June 2021, there was net in-migration from the UK to the county of around 6,600 people, and that this number decreased to 4,300 in 2022, which is around the average for the years 2015-2019, suggesting that this “pandemic effect” was somewhat temporary.

International migration

The coronavirus (COVID-19) pandemic had a major impact on travel and migration patterns. Brexit and other world events, such as the war in Ukraine have also had a significant impact on international migration into and out of the county. So while net international migration was negative in the period from 2019-2021, there were net flows from overseas of an average of +340 per year over the 10 year period 2009-2018. In 2022, there was a net inflow of over 1,900, but this may partly reflect a large number of refugees who arrived into the county through the Homes for Ukraine scheme, and numbers are unlikely to be as large in the future.

- East Sussex in Figures contains further details and data on population projections, household projections, and workforce projections.
- Read the latest analysis of the mid-2022 population estimates produced by the Research and Information Team.
- For further information about demographic projections for East Sussex, please contact Lenna Santamaría on email: mariahelena.santamaria@eastsussex.gov.uk.

Contact details

The Research and Intelligence Team, Governance Services, provides demographic and socio-economic data, intelligence, and insight to support East Sussex County Council and other East Sussex Partners. The Team also manages East Sussex in Figures (ESiF), the Local Information System for East Sussex.

Visit www.eastsussexinfigures.org.uk or e-mail esif@eastsussex.gov.uk for more information.