East Sussex
County Council

Demographic projections…in brief

May 2025

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 for 2023 at district level which were released in June 2024 and small area population estimates which were rebased for 2012-2021, following the 2021 Census. They also use a set of assumptions of future fertility, mortality and migration. Fertility rates trends reflect those used in the latest ONS National population projections. They are dwelling–led demographic projections based on planned housing figures provided by the districts and boroughs as at spring 2025.

> The East Sussex population is projected to grow by nearly 45,000 in the next 15 years. There will be a large increase in the number of people aged 60+, compared 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.
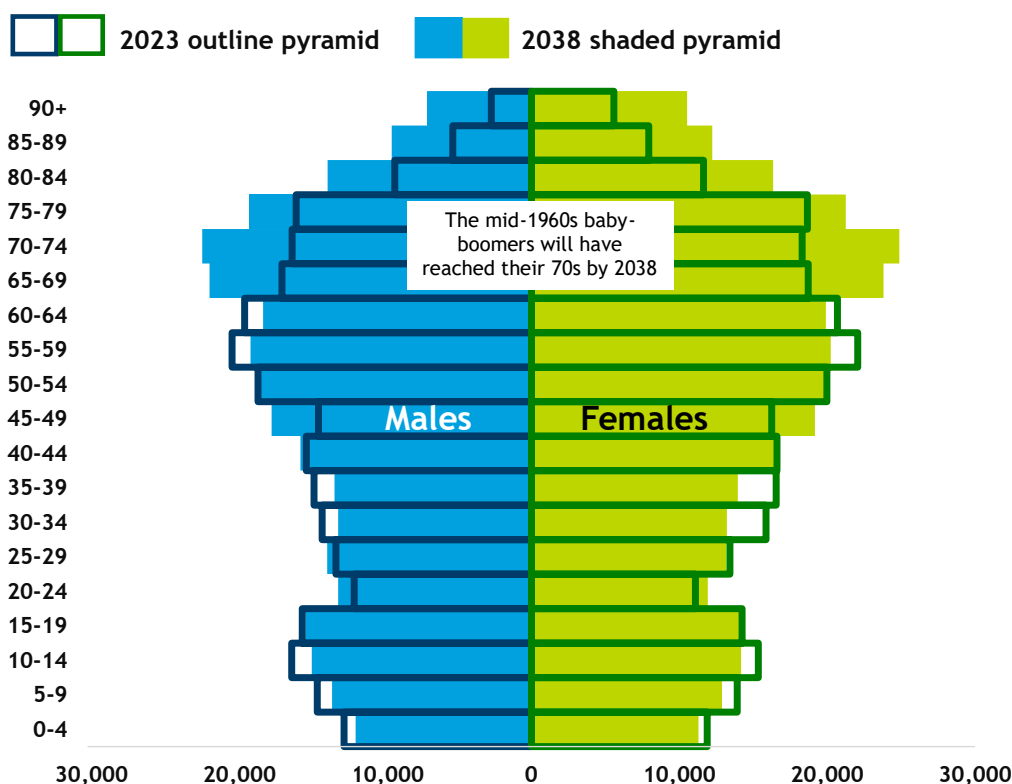
555,500
Population in 2023

600,300
Projected population in 2038

Fig. 1: East Sussex population in 2023 and 2038, by age and sex

2023 outline pyramid   2038 shaded pyramid

The mid-1960s baby-boomers will have reached their 70s by 2038

Males   Females

Key points

- The population of East Sussex is projected to increase by 44,800 to 600,300 between 2023 and 2038. The number of households is expected to increase by 13.7%, while the population is projected to increase by 8.1%, over this 15 year period, as average household size declines from 2.19 people per household in 2023, to 2.07 in 2038.

- The over 65s are projected to see the largest increase in numbers over the projection period, 2023-2038, as the population continues to age. This will be exaggerated because 'baby boomers' born in the mid-1960s will be in their 70s by 2038, and those from the post-war baby boom will be in their late 80s/90s.

- The over 65s now represent over a quarter of the county's population (26.5%) and are projected to make up a third (33.7%) of all people by 2038. 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 82%, from around 21,500 in 2023 to 39,300 in 2038.

- In Rother, which had the joint highest proportion of over 85s of all lower tier authorities in the country in 2023, older people (aged 65+) are expected to make up more than 40% of the population in 2038 (up from 33% in 2023). The proportion of over 85s in Rother is forecast to rise from 4.9% to 8.0% in 2038.

- The number of households is forecast to increase by 13.7%, from 247,700 in 2023 to 281,700 in 2038. The largest increases will be 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 just 0.8% over the 15 years from 2023 to 2038, an increase of 2,000 to 256,400 in 2038.

Age groups

Fig. 2: Projected actual change in numbers between 2023 and 2038 – 10-year age groups
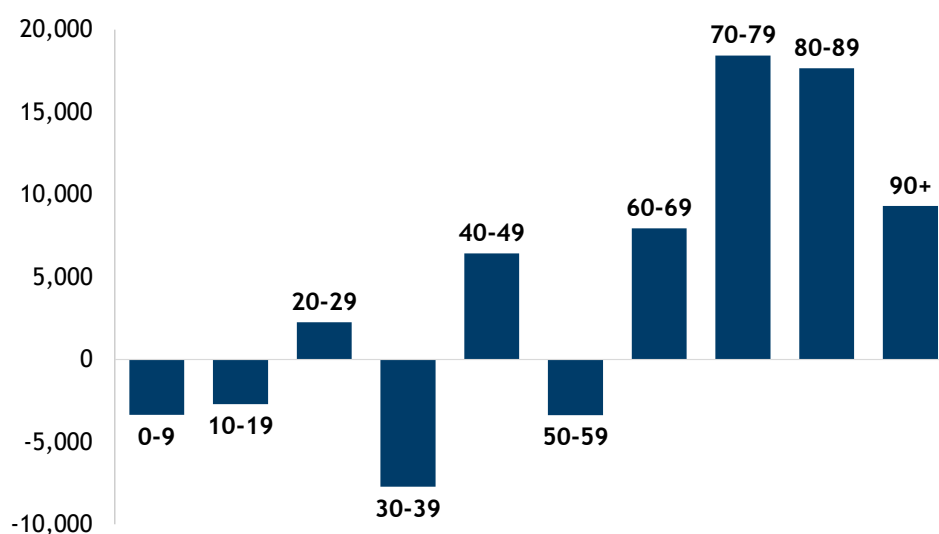
- There is expected to be a decrease in the number of children and young people aged 0-17 (down 6.6%). This is partly because the population of women of childbearing age (15 to 44) is expected to fall overall between 2023 and 2038, by 5.3%, from 87,800 to 83,100, although there is projected to be a slight rise between 2026 and 2029.

- The model projects that there will be a small decline in the working age population (18-64) of -1.2%, from 304,800 in 2023 to 301,100 people in 2038. There are forecast to be rises among the 20-24 age group (up 8.3%), the 25-29 group (+1.2%), and among the 40-49 age group (+10.3%) but declines among those aged 30-39 (down 12.6%), 50-59 (-4.2%) and those aged 60-64 (-5.1%).

- The fall in the number of people in later middle-age (50-64) is explained by the aging-on of people born in the baby-boom in the mid-1960s, and this cohort is being followed by a generation with fewer people.

- The number of older people aged 65 and over in the county is projected to increase from 147,000 in 2023 to 202,400 in 2038, an increase of 55,400, or 37.7% (note rounding). Numbers in the oldest age group (aged 85+) are projected to increase most significantly, by 82% over the 15 years from 2023-2038, an increase of 17,700.

Change between 2025 and 2029

- When looking at a shorter time frame, the pattern of projected changes over the next few years is slightly different. Over the period 2025-2029, the population is projected to increase by 3.2%, rising from 560,000 in 2025, to 577,700 by 2029. The largest increase is forecast to be among the oldest age group, with the number of over 85s increasing by 18.3% to 27,100 in 2029.

Table 1: Projected population in East Sussex in 2025 and 2029, by age group

	2025	2029	Actual change	% change
0-17	103,000	101,600	-1,400	-1.4%
18-64	303,700	306,300	2,600	0.8%
65-84	130,400	142,800	12,300	9.5%
85 and over	22,900	27,100	4,200	18.3%
Total	560,000	577,700	17,700	3.2%

Median age

- The average (median) age of East Sussex residents is forecast to rise to 52 years and 4 months in 2038, from 48 years and 6 months in 2023 as the population continues to age.

Children and young people aged 0-17

103,600	96,800
Population in 2023	Projected population in 2038

- The population of children and young people in East Sussex is projected to decrease by 6.6% over the period 2023-2038, from 103,600 to 96,800, a decline of 6,800 children.

- When we look at the shorter period from 2025-2029, the population of children and young people is projected to fall by 1.4%, from 103,000 to 101,600, a fall of 1,400.

- The decline in the number of children is projected to begin in 2024, and then continue fairly steadily over the next 14 years.

Fig. 3: Projected population of children and young people aged 0-17, 2023-2038
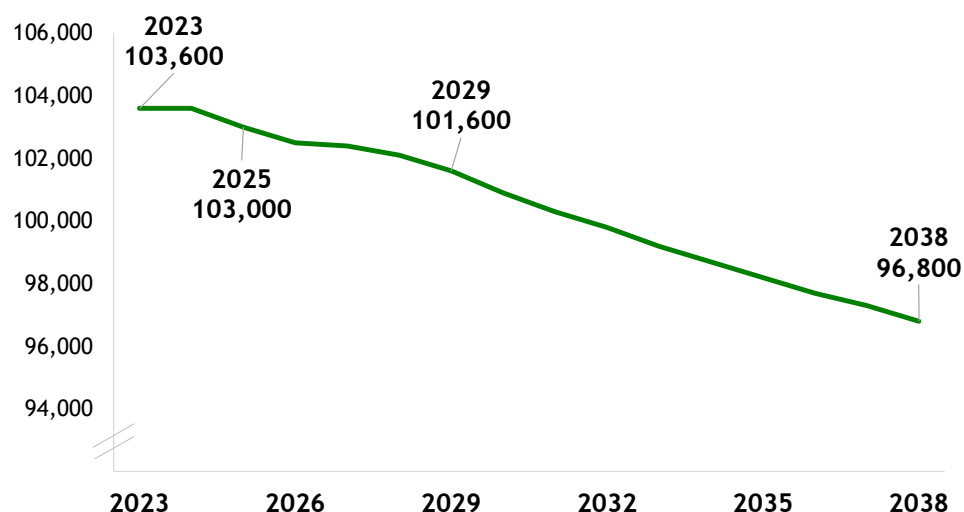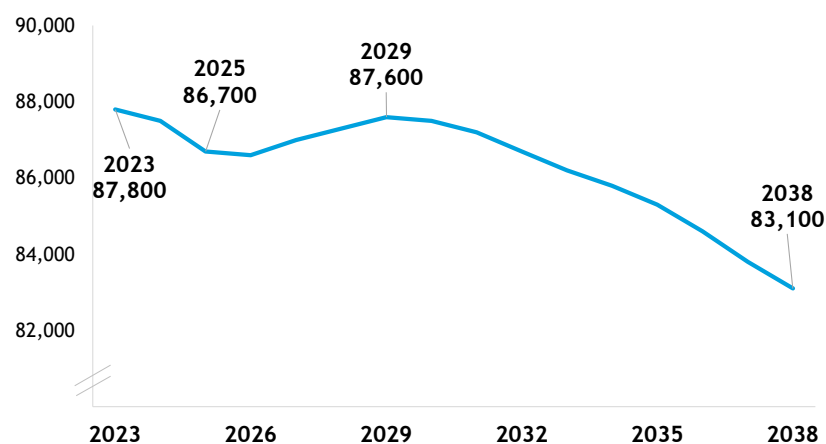

Fig. 4: Population of females aged 15-44, 2023-2038

- Looking at the 15 years 2023-2038, there is projected to be a decline in the number of households with children of 1.8% (1,000), from 58,400 to 57,400.

- While the total number of 0–17 year-olds is expected to fall significantly in East Sussex (by 6.6%) between 2023-2038, there will be a large variation between the districts, with Wealden seeing a rise of 3.4%, and numbers in Eastbourne declining by 21%.
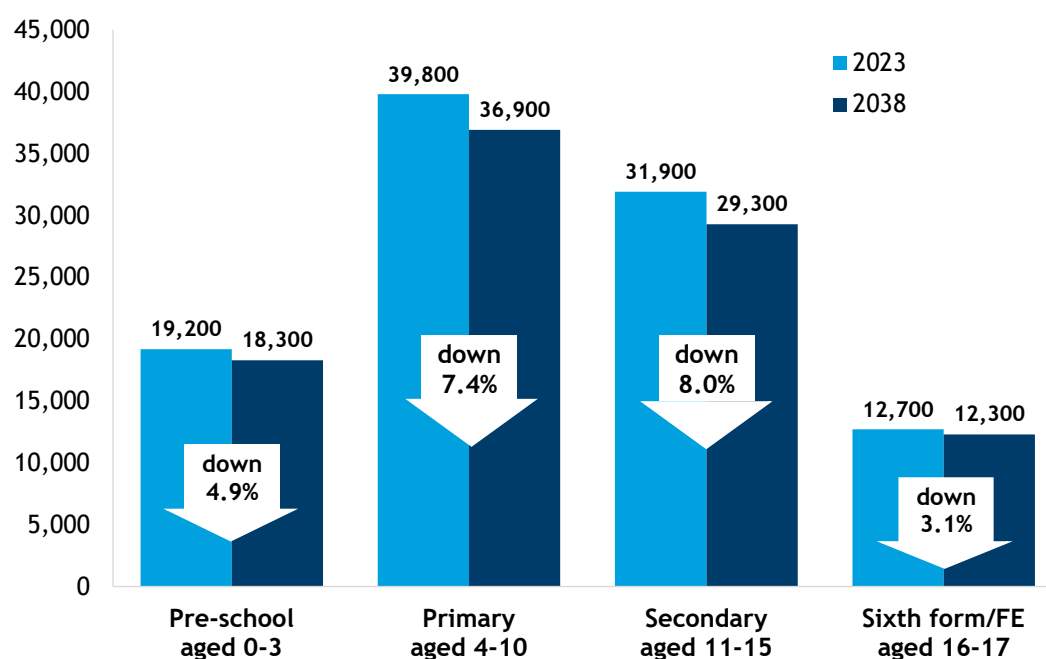
Fig. 5: Projected change in the number of children aged 0-17 by district, 2023-2038
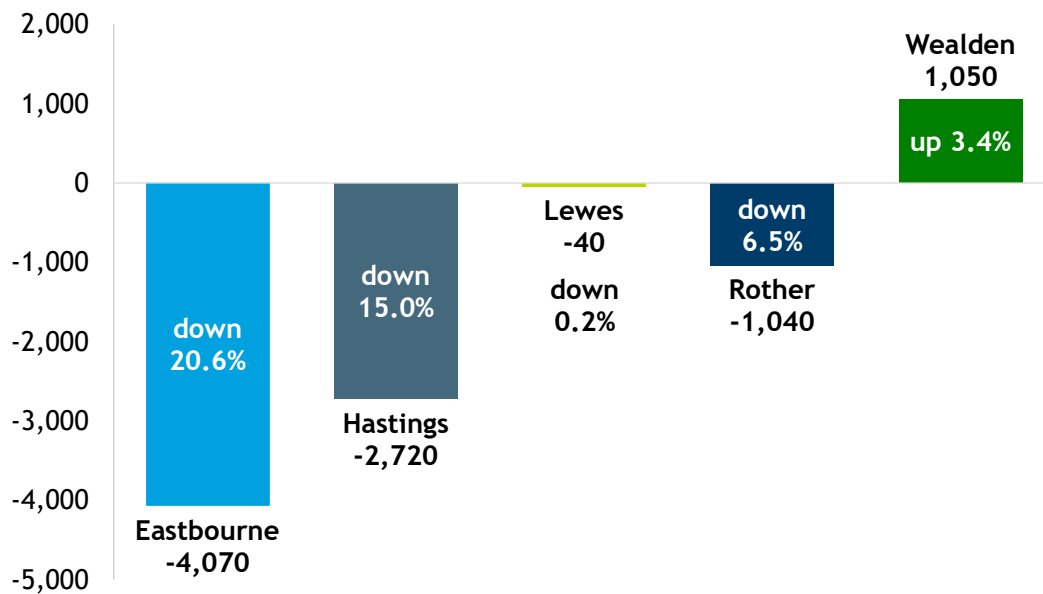
Detailed age groups

- The number of pre-school aged children (aged 0-3) is projected to decline by 4.9% (900) over the period from 2023-2038.

- Primary school-age children (aged 4-10) are expected to fall by 7.4% (down 2,900) over the 15 years 2023-2038. Secondary age (11-15) numbers are expected to fall by 8.0% (down 2,600).

- Among Sixth form/FE aged young people (aged 16-17) there is projected to be a smaller decline of 3.1% (700) over the 15 years

Fig. 6: Projected population change among children and young people in East Sussex, by age group, 2023-2038

- When looking at the period 2025-2029, there is projected to be a decline of 1,400 (1.4%) from 103,000 to 101,600, in the number of children aged 0-17.

- The number of those aged 0-3 is projected to see a fall of 0.9% (200). There are projected to be falls among those aged 4-10 (a decline of 2.6% or 1,000 children) and those aged 11-15 of 1.8% (down 600) over the 5-year period 2025-2029. However, in the 16-17 age group, there is a projected to be an increase of 2.4% (300 more young people).

**Table 2: Projected population of children in East Sussex by age group, 2025-2029**

	2025	2029	Change 2025-2029	% change 2025-2029
0-3	18,900	18,700	-200	-0.9%
4-10	39,400	38,400	-1,000	-2.6%
11-15	31,700	31,100	-600	-1.8%
16-17	13,000	13,300	300	2.3%
0-17	103,000	101,600	-1,400	-1.4%

Working-age people (aged 18-64)

|	
303,700 Population in 2023	**306,300** Projected population in 2038

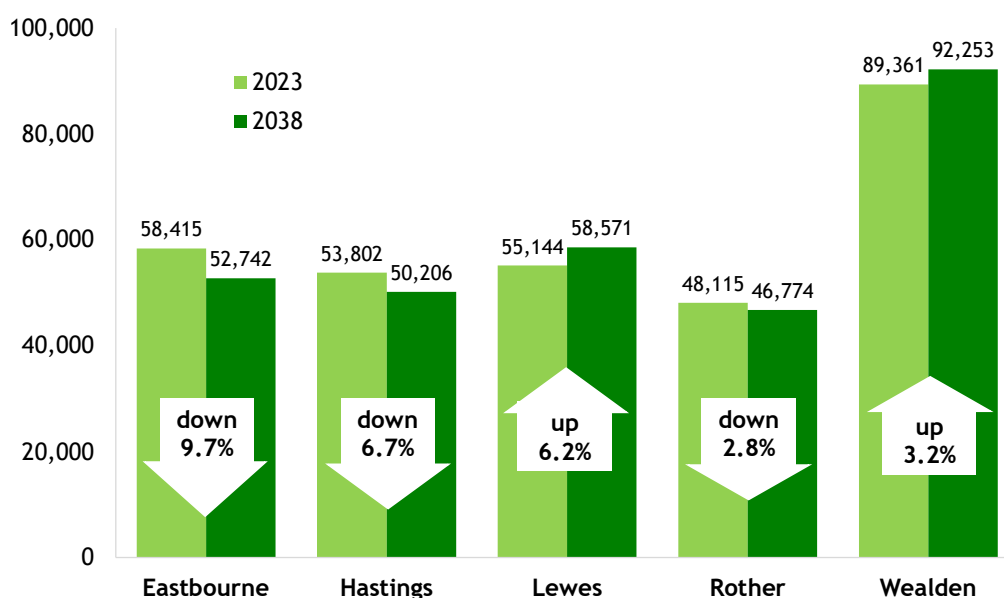**Fig. 7: Projected population of working-age people (aged 18-64), 2023-2038**
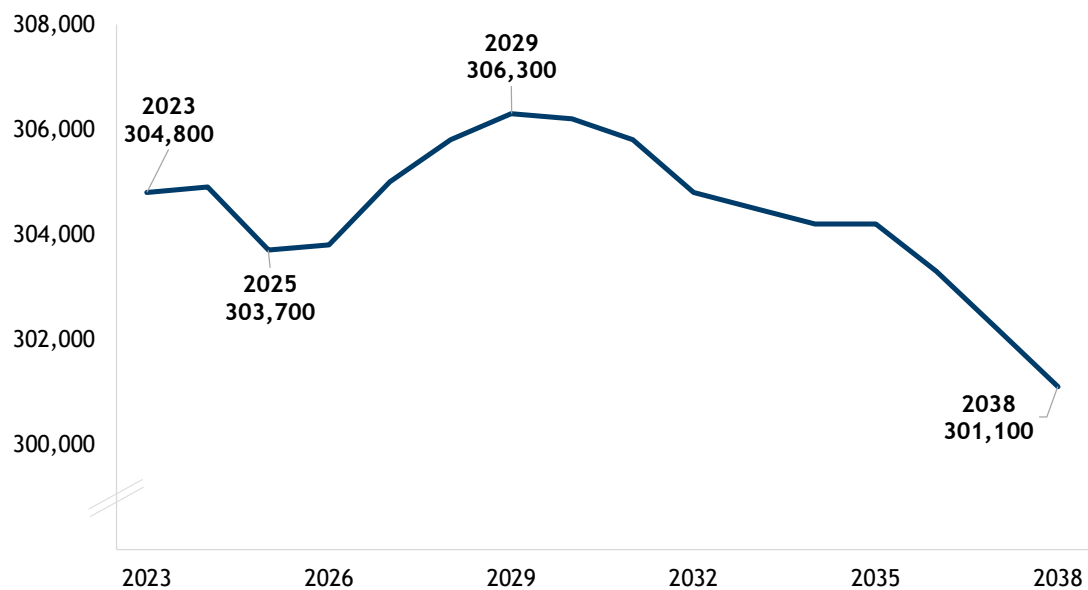
- The model projects that there will be a small decline in the working age population (18-64) of -1.2% or 3,700, from 304,800 in 2023 to 301,100 people in 2038. However the change is not evenly distributed across the age groups. There will be a rise among the youngest working-age group (18-24) of 7.9% and among the 45-54 age group (up 8.4%).

- But there will be declines among people aged 25-34 (down 6.0%), those aged 35-44 (down 5.8%), and among those aged 55-64, of -6.2%, as the population numbers from the baby-boom in the mid-1960s get older, and are followed by a generation with fewer people.

Fig. 8: Projected working-age population by age group, 2023-2038
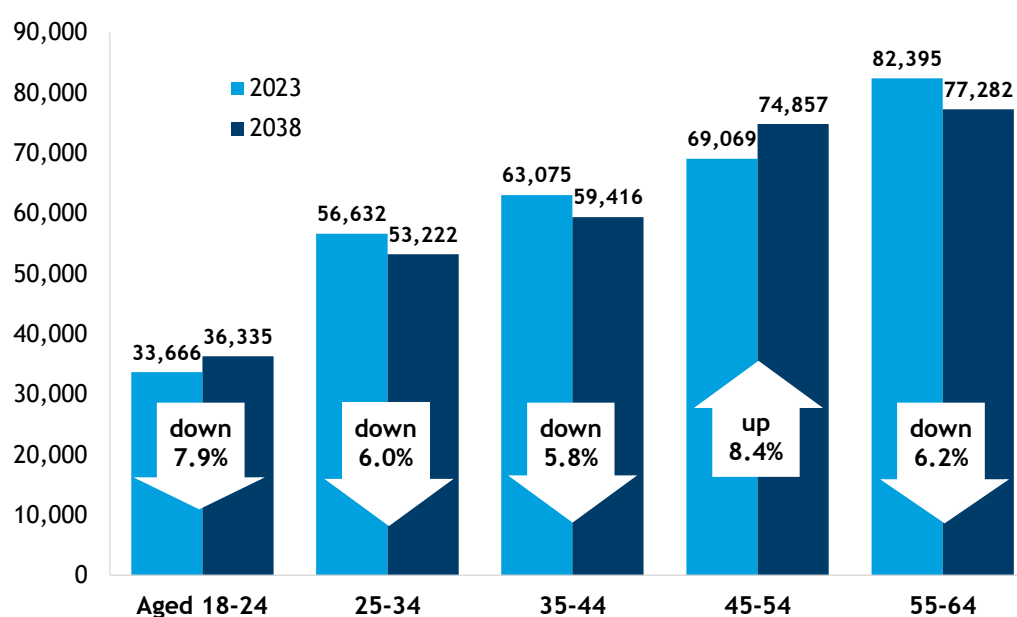
- While the number of working age people in Lewes is predicted to increase by 6.2% in the period 2023-2038, and in Wealden by 3.2%, there is forecast to be a significant decline in Eastbourne (down 9.7%) and in Hastings (down 6.7%) and to a lesser extent Rother (2.8%).

Fig. 9: Population of working age (18-64) by district, 2023 and 2038

- The number of households headed by people of working age (16-64) is set to decrease by 2.2% over the period 2023-2038, which compares to an increase in population of this age group, and compares to a projected rise of 39.4% among households headed by older people (aged 65+) over the same period.

- Within the working age (16-64) group, households with children are projected to decrease by 2.4% over the 15 years to 2038, one person households by 2.3% and other households are projected to decline by 1.8%.

Fig. 10: Percentage change in number of households by age group, 2023-2038
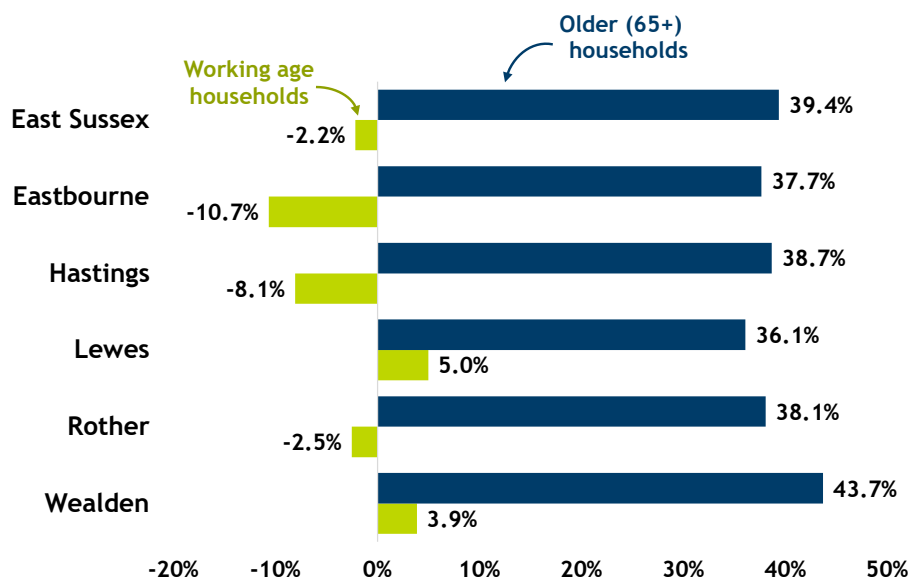
- When looking at the period 2025-2029, there is projected to be an small increase of 2,600 (0.8%) from 303,700 to 306,300 in the number of working-age people aged 18-64. But while the number of those aged 18-24 is projected to see a rise of 11.7% (3,900), there is projected to be a fall among those aged 25-44 (down 1,600 or -1.4%), and only a very marginal rise among those aged 45-64 (up 300, 0.2%).

Table 3: Projected population of working age people in East Sussex by age group, 2025-2029

	2025	2029	Change 2025-2029	% change 2025-2029
18-24	33,500	37,400	3,900	11.7%
25-44	118,100	116,500	-1,600	-1.4%
45-64	152,100	152,400	300	0.2%
18-64	303,700	306,300	2,600	0.8%

Older population (aged 65 and over)

| 147,000	202,400
Population in 2023	Projected population in 2038

Fig. 11: Projected population of older people aged 65 and over, 2023-2038
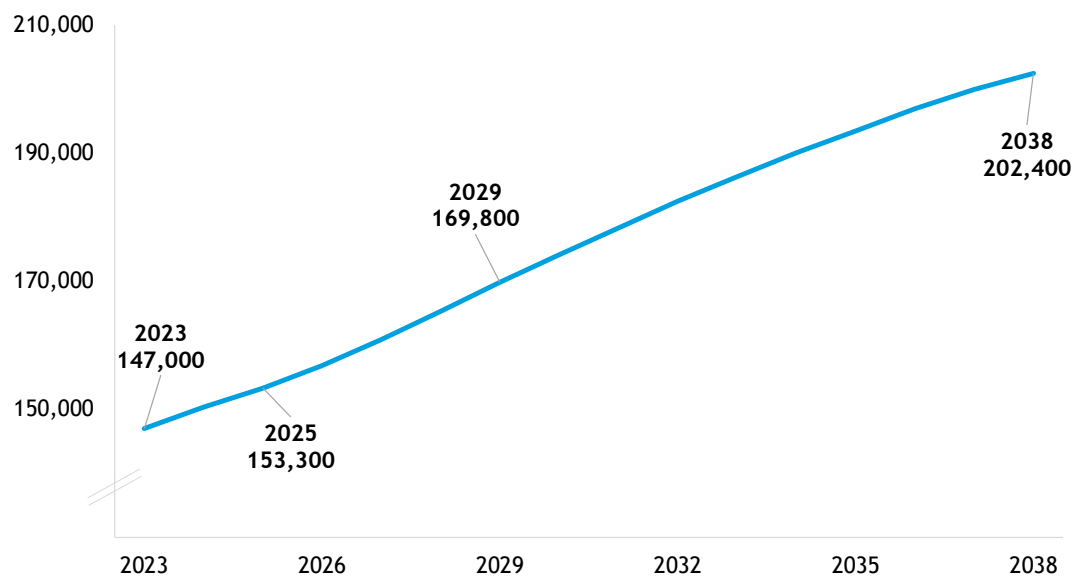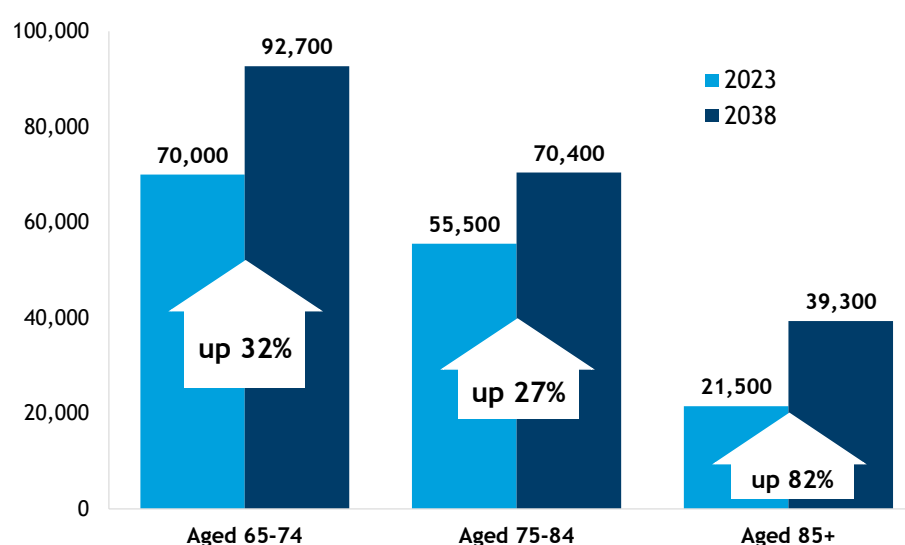

- The number of older people aged 65 and over in the county is projected to increase from 147,000 in 2023 to 202,400 in 2038, an increase of 59,090, or 40.6% (note rounding).

- The number of men aged 65+ is projected to rise by 41% (27,200) to 93,400 in 2038, while the number of women is projected to increase by 35% (28,200) to 109,000.

Fig. 12: Projected population of older people aged 65 and over, males and females, 2023-2038
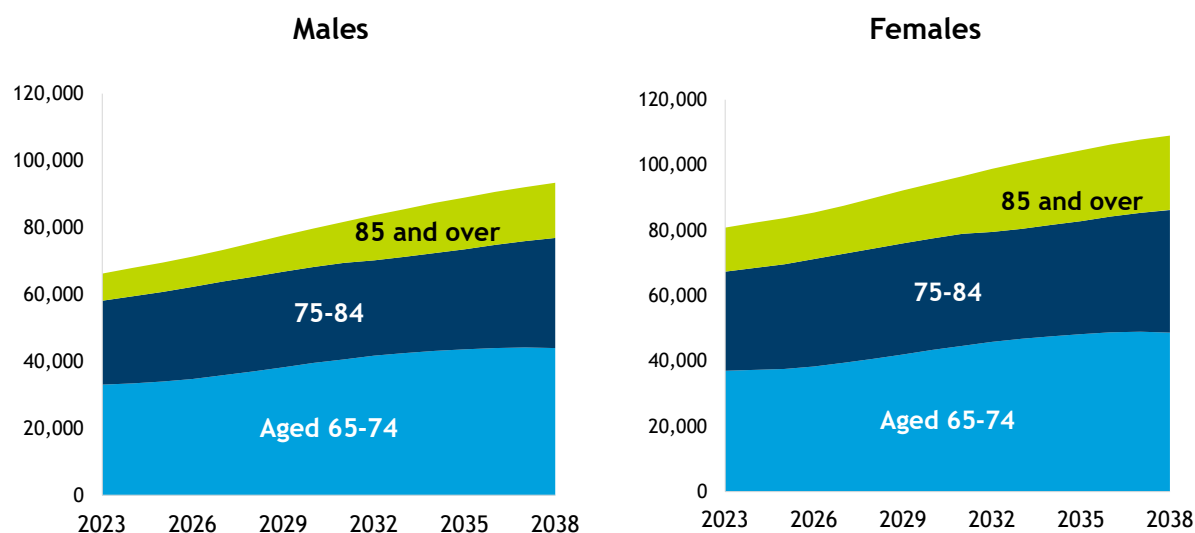

- Numbers of the oldest group (aged 85+) are projected to increase fastest, by 82% over the 15 years from 2023-2038, an increase of 17,700, as the postwar baby boomers reach their mid-80s. This change will be largest among the oldest men with an increase of 105% (8,500) among men aged 85+ compared to a 69% (9,300) rise among women aged 85+.

- There is also forecast to be more than double the number in the very oldest group (aged 90 and over), increasing from 8,300 in 2023 to 17,600 people in 2038. As the population of older men rises, there will be 4,300 more males aged 90+ (up 160%), and 5,000 more females (up 89%) in this age group.

- Other older age groups will also increase steeply, with the 65-74 age group projected to increase by 32%, and 75–84 year-olds projected to rise by 27% over the 15 year period.

**Fig. 13: Projected older population by age group, 2023-2038**

- 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 41% over the 15 years from 2023-2038. Hastings and Rother will see the second largest increase of 37%.

- Wealden will also see the largest rise among the very old with an increase of 92% (5,800) among the over 85 group.

- The increases in Eastbourne (36%), and Lewes (up 35%) in the period 2023-2038 will also be very significant, especially when compared to the changes among other age groups.

- In 2023, 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 41% of the population by 2038, 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 2023, but even here, the proportion is forecast to rise to 28% in 2038.

Fig. 14: Projected older population (aged 65+) by district, 2023-2038
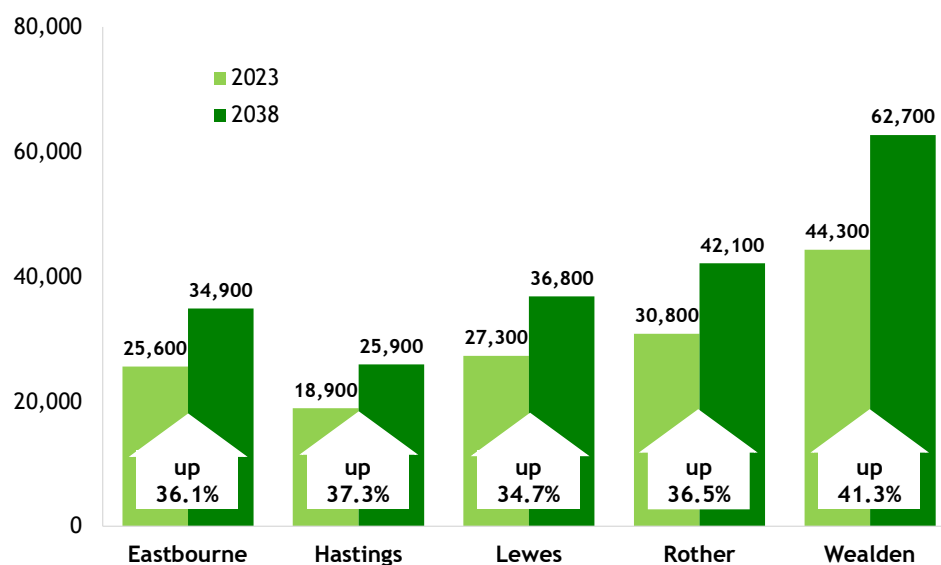
- While the total number of households is projected to increase by 13.7%, from 247,700 in 2023 to 281,700 in 2038, the number of older households (aged 65 and over) is forecast to increase by 39.4%, from 94,700 to 132,000 in 2038, an increase of 37,300.

- The largest increase in older households is projected to be in Wealden, where older household numbers are projected to rise by 44% from 28,200 to 40,500.

- But all the other districts are also projected to see large rises in older household numbers, with Hastings projected to see a rise of 39% from 12,300 to 17,100.

Fig. 15: Change in household numbers by age in East Sussex, 2023-2038
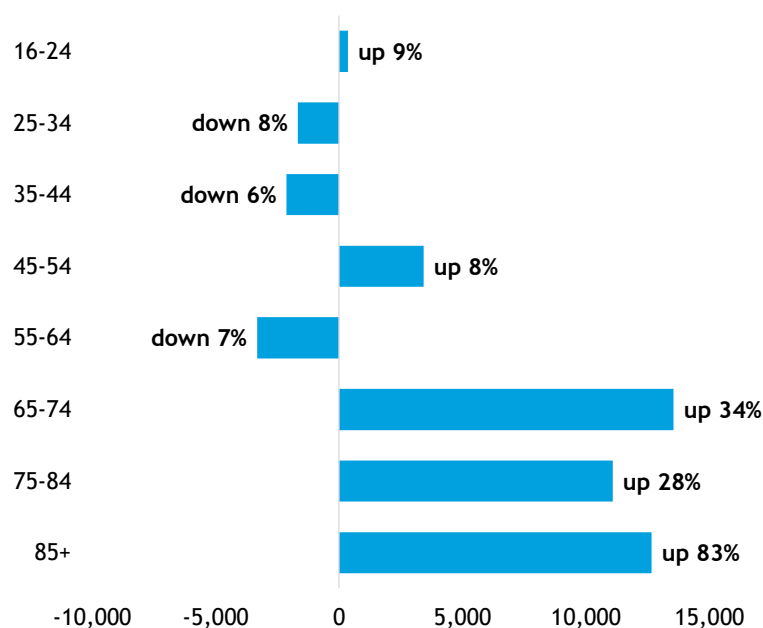
- As the older population rises, there will be little change in the working age population. This means that dependency ratios for all dependents and for older people will rise significantly. The change in the elderly dependency ratio will be most significant in Rother where the ratio will rise from 5.7 in 2023 to 8.0 older people aged 65+ for every 10 working age people (aged 16-64) in 2038.

Fig.16: Number of dependents aged 65+ per 100 working age people, 2023 and 2038
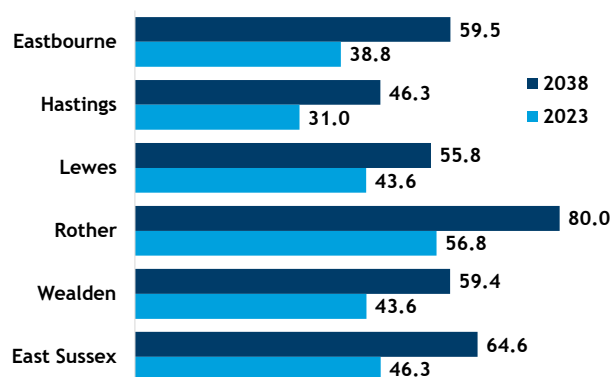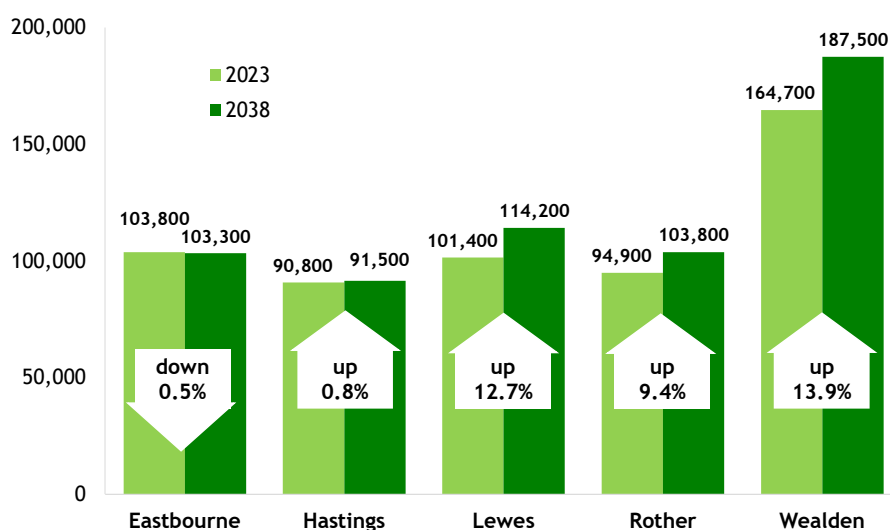

Table 4: Projected population of older people aged 65+ in East Sussex by age group, 2025-2029

|	2025	2029	Change 2025-2029	% change 2025-2029
Aged 65-74	71,600	80,300	8,700	12.1%
75-84	58,800	62,500	3,700	6.2%
85 and over	22,900	27,100	4,200	18.3%
Total aged 65+	153,300	169,800	16,500	10.8%

Districts

Fig. 17: Projected total population in East Sussex districts, 2023-2038, with projected change

- The population is projected to increase in all districts except Eastbourne, with the largest rise forecast in Wealden (13.9%), where substantial new housing development is being planned.

- There are also forecast to be significant rises in Lewes (12.7%) and Rother (9.4%), but only a marginal increase in Hastings (0.8%). Eastbourne is projected to see a slight fall (-0.5%) over the projection period from 2023-2038.

Dependency Ratios

Fig. 18: Dependency ratios in 2023 and 2038 – districts
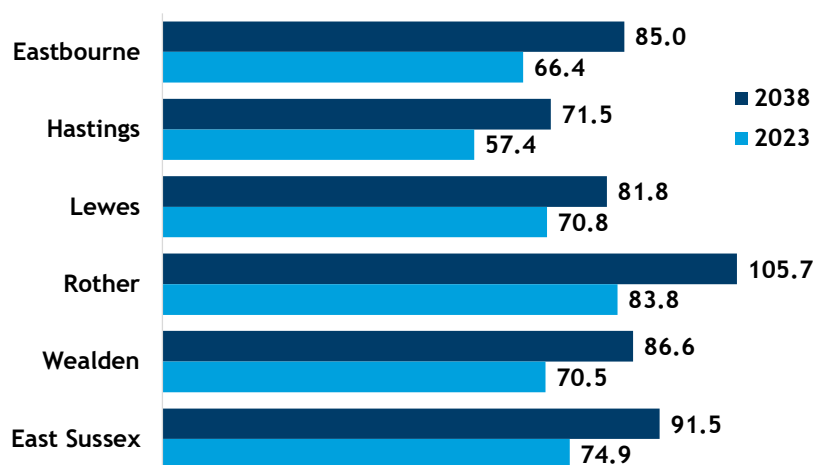
- The overall dependency ratio (the number of dependents for every 100 working age people, aged 16-64) is expected to rise to 92 in 2038, from 75 in 2023. For elderly people (see previous page for chart), in 2038 there are projected to be 65 people aged 65+ for every 100 of working-age, up from 46 in 2023. This change will be most extreme in Rother where the ratio will rise from 57 in 2023 to 80 in 2038.

Household projections

Fig 19: Household numbers in East Sussex by age and household type, 2023 and 2038
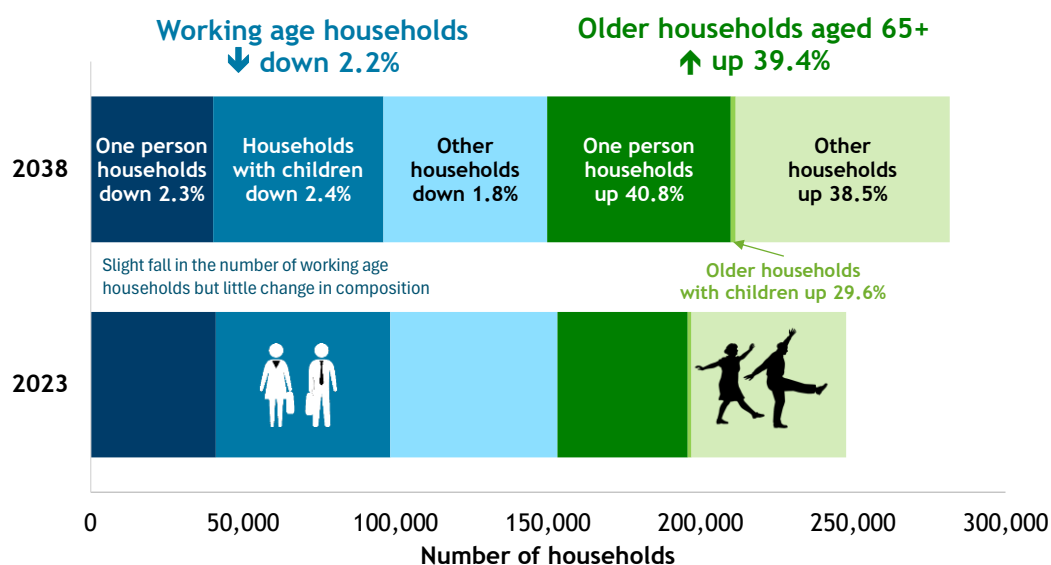
- Over the period 2023-2038, the number of households in East Sussex is projected to increase by 13.7%, faster than the 8.1% growth in population expected for the same period. This is mainly because the average number of people living in each household (household size) is expected to fall from 2.19 in 2023 to 2.07 in 2038.

- Of all household types, One-person households are expected to increase by the largest proportion (19.7% - 16,500 more households) by 2038. 'Other' households, which includes couples without children and other types of adult-only households, are expected to increase by 17.6% (18,500 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 13.7%, from 247,700 in 2023 to 281,700 in 2038, the number of older households (aged 65 and over) is forecast to increase by 39.4%. However, working aged households (aged 16-64) will decline by 2.2%.

- Single female households and single male households are also expected to see large increases, of 23% and 16% respectively – but this increase will occur mainly among older households. There will be a 41% increase in single households aged 65 and over – 39% increase in females and 45% increase in males. By contrast there will be a small fall projected in the number of single working age households (down 2.3%).

- Over the period 2023-2038, the total number of families with children are projected to decline by 1.8%. Households with two children are projected to decline by 0.9%, but the number of households with one child are projected to decrease by 2.2%, and households with three or more children by 2.5%.

Table 5: Average household size

	2023	2038
Eastbourne	2.15	1.99
Hastings	2.08	1.98
Lewes	2.24	2.14
Rother	2.13	1.99
Wealden	2.29	2.17
East Sussex	2.19	2.07

Table 6: Projected population change, 2023-2038

	2023	2038	Change 2023-38	% change 2023-38
Eastbourne	103,800	103,300	-500	-0.5%
Hastings	90,800	91,500	700	0.8%
Lewes	101,400	114,200	12,800	12.6%
Rother	94,900	103,800	8,900	9.4%
Wealden	164,700	187,500	22,800	13.8%
East Sussex	555,500	600,300	44,800	8.1%

Table 7: Projected household change, 2023-2038

	2023	2038	Change 2023-38	% change 2023-38
Eastbourne	47,200	50,300	3,100	6.5%
Hastings	42,700	45,000	2,300	5.4%
Lewes	44,900	52,600	7,700	17.2%
Rother	43,000	50,000	7,000	16.2%
Wealden	69,800	83,700	13,900	19.9%
East Sussex	247,700	281,700	34,000	13.7%

Labour force projections

**Fig. 20: Workforce projections for East Sussex by age group, 2023-2038**
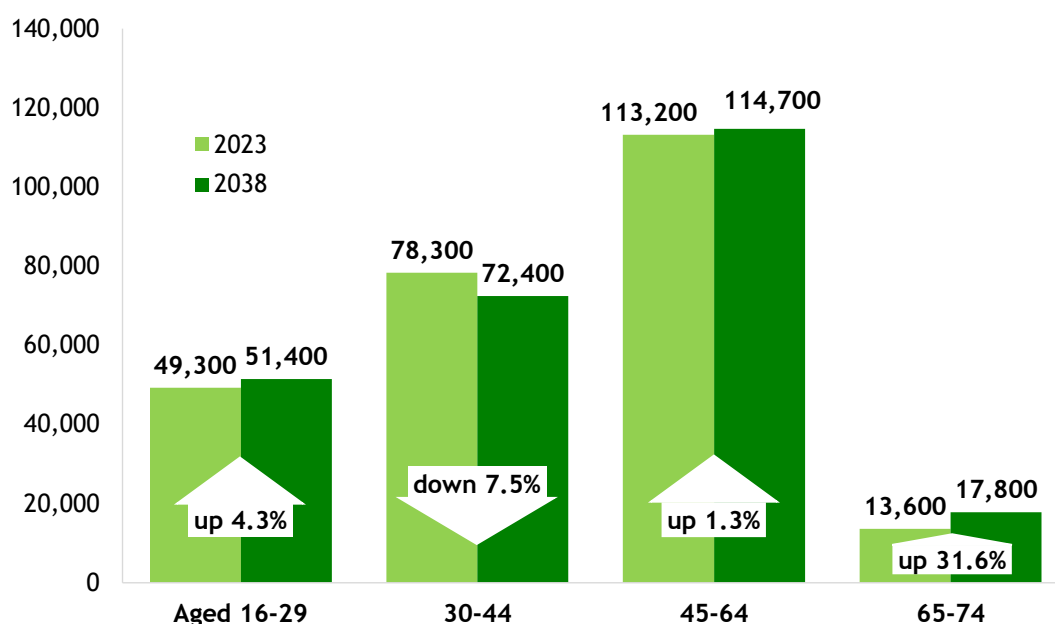
- The labour force (economically active people aged 16-74) is expected to increase by just 0.8% (by 2,000) to about 256,400 people in 2038. While there is projected to be a small decline in younger workers up to age 64 of 1.0%, there is expected to be a 32% increase in the labour force aged 65-74. This reflects 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 the largest rises are projected among the 45-49 age group (up 5,200) and the older age group (aged 65-74 up 4,300). Smaller rises are projected among the youngest workers (aged 16-29). A decrease is projected among the 30-39 age group and big falls among those aged 55-64 (down 3,500).

Table 8: Projected workforce (aged 16-74) change by districts, 2023-2038

	2023	2038	Change 2023-38	% change 2023-38
Eastbourne	47,200	43,000	-4,100	-8.8%
Hastings	43,000	40,600	-2,300	-5.5%
Lewes	46,700	50,300	3,700	7.9%
Rother	39,800	39,700	-100	-0.3%
Wealden	77,900	82,800	4,900	6.3%
East Sussex	**254,500**	**256,400**	**2,000**	**0.8%**

Fig.21: Actual change in labour force numbers by detailed age group and sex, 2023-2038
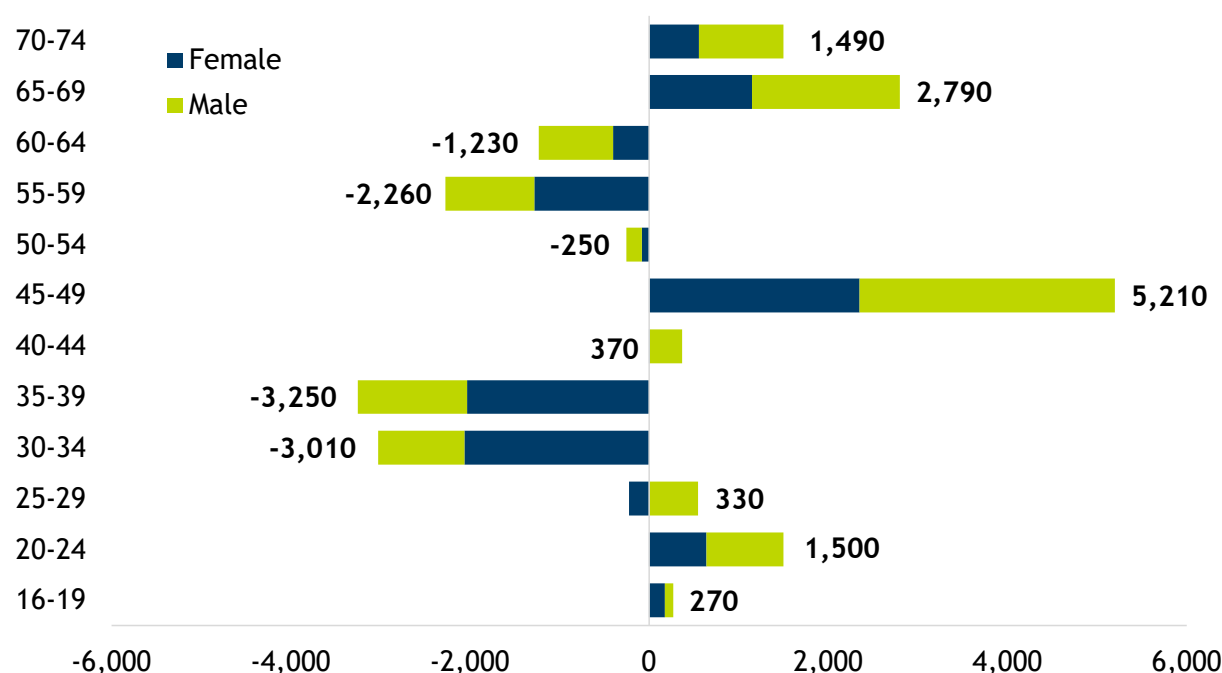
- However, the overall rise masks differences between changes to the male and female workforce, with males increasing by 3,100 (up 2.4%), compared to a decline of -1,200 (down 0.9%) among females.

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 uses 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 2023-based ESCC projections are based on the national, county and district level mid-2023 population estimates released by ONS in July 2024. They are also based on small area population estimates to 2022 which were substantially revised for the period 2012-2021 following the 2021 Census and released in November 2024.

These projections use 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 November 2023 because we have significantly revised the fertility rate trends, which now more closely reflect those used by the ONS in their latest 2022-based national population projections, and also reflect the latest births data. In 2023, the number of births in East Sussex was at the lowest level since 1982. In East Sussex, the total fertility rate was 1.48 births per woman in 2023, just above the national rate of 1.44. We have used the average rates for the last 5 years in each district as the basis for future births in the model. In addition to this, the latest projections use revised house-building trajectories provided by the districts and boroughs in Spring 2025.

The state pension age is currently 66 for both men and women and now increases every few months, and will be 67 by 2038. In this analysis 'pensioners' and 'older people' are assumed to be all those over the age of 65, right up to 2038. 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 2023 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 overleaf).

Population Projections
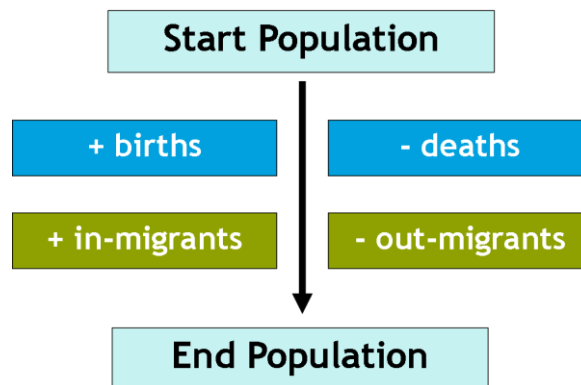
The starting population is therefore projected forward, one year at a time, taking account of the impact of births, deaths and migration (internal and international migration). Assumptions about future fertility, mortality and migration trends are derived from recent historical evidence from the ONS components of change released with the latest mid-year population estimates (2023 estimates released in July 2024).

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 2023, there were 6,984 deaths registered in East Sussex. This was lower than the pandemic years of 2020 (7,071) and 2021 (7,450) 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 2023 when there were 4,321 births. 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 latest ONS mid-year estimates, released in June 2024, 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 4,500 in 2023, which is similar to the average for the 10 years 2010-2019 (4,300 per year), 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 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, net international migration was +2,200 and in 2023, there was a net inflow of over +2,900, 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. The latest national internation migration data shows a significant decline in net international migration.

- East Sussex in Figures contains further details and data on population projections, household projections, and workforce projections.

- Read the latest analysis of the mid-2023 population estimates produced by the Research and Information Team.

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.

ESiF is a web-based information system that contains detailed, up-to-date and reliable information on a very wide range of topics.

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