

1. Introduction

1.1 This Topic Paper has been prepared in order to assist deliberations into the Carmarthenshire Local Development Plan. Most of the information contained within this Topic Paper has been derived from national data sources

1.2 The purpose of this topic paper is to set out the background to the preparation of the LDP's evidence base with a population overview of Carmarthenshire.

1.3 Demographic information is an important component of strategic planning. Information is needed on the size of the population, its rate of growth, its distribution between areas, its composition by sex, age and socio-economic group. Estimates of current and future population are therefore fundamental for LDP purposes in establishing characteristics of the population and assessing how much additional land needs to be made available for housing, employment and other major uses.

1.4 The policies of the current land use planning framework for the County, the Unitary Development Plan (UDP) are based on an expectation of population growth particularly through positive policies for the declared aim of retaining a higher proportion of Carmarthenshire's young, skilled and economically active population. Land to meet increased housing requirements (together with that for new employment opportunities) has been allocated in accordance with the sustainable strategic settlement framework with an adequate supply and range of sites for industrial/commercial development in appropriate locations.

2. County Overview

2.1 Carmarthenshire is the third largest County in Wales in geographic terms, covering some 2,371 square kilometres at mid 2006, which is 11.5% of the total land-mass of Wales. With a resident population of 178,000 at mid-2006 Carmarthenshire the County's rate of population growth estimated at 2.5% greater than the Welsh average of 1.9%. The County has a growing population, it grew by 4,300 people from 2001 to mid-2006, and the average growth per year has been 0.5 per cent since mid-2001.

2.2 The County's population has increased since the late 1990's and with deaths exceeding births net migration is the major component of population change. Population changes since 2001 highlight that there has been a growth in the population aged 15-44 years of age of 0.6%, a growth of 7.4% in those aged 45-64 years and a 3.8% increase in those aged over 65 years. Those aged 0-14 years have declined, by 2.4%.

2.3 The density of population varies within the County: the south and east of the County around Ammanford & the Aman Valley, Cross Hands & Kidwelly (Gwendraeth Valley) and Llanelli - where 65% of the County's population reside in 35% of the County's area- is more densely populated than the rest of Carmarthenshire which is highly rural and punctuated with key market towns and villages supporting the agricultural backcloth. This difference can have major impacts on future land use proposals and service delivery as services have to adapt to meet the different geography and needs of these areas.

2.4 According to the 2001 Census there are a greater proportion of retired people in Carmarthenshire (22%) compared with Wales (20%), and the County has one of the poorest health profiles in Wales with 26% of residents having a long standing illness or disability. This brings about different service provision issues for both the public, private and voluntary sectors.

3. 2001 Census Profile of Carmarthenshire

The most comprehensive assessment of the resident population of the County is provided by the decennial Census.

3.1 The resident population of Carmarthenshire, as measured by the 2001 Census, was 172,842, of which, 48% were male and 52% were female. The majority of people living within the County (40.5%) fell into the 30 to 59 age group, giving an average age for Carmarthenshire residents as 41.1 years. The Census results for Carmarthenshire confirm that the County has a steadily ageing population with only 4.8% and 10.1% falling into the 16 to 19 and 20 to 29 age categories respectively.

3.2 Over 99% of Carmarthenshire's resident population described themselves as White, with Asian accounting for the highest proportion of ethnic minorities at 0.3%. Other ethnic groups included Mixed, Black and Chinese, accounting for between 0.1% and 0.2% of the County's population. The majority of the population classed themselves as Christian (74.6%) which was slightly higher than the Welsh average of 71.8%, with 16.4% indicating no religion and between 0.1% and 0.2% stating their religion as Buddhist, Hindu or Muslim.

3.3 With regards to health and the provision of care, 26.3% of Carmarthenshire's residents stated that they had a limiting long term illness, health problem or disability that limited their daily activities or the work they could do; this percentage was higher than that recorded for Wales and England at 18.2%. When asked to describe their health status, 62.4% affirmed that their health was "good", with 23.6% "fairly good" and 13.9% claiming "not good". The 2001 Census asked respondents about any voluntary care provided to look after, or give any help or support to family members, friends, neighbours or others because of long term physical or mental ill-health or disability, or problems relating to old age; 12.6% of Carmarthenshire's population stated that they did provide such care, which was above the 10% recorded for Wales and England.

3.4 53.4% of the resident population were in employment, with 3.4% unemployed. Within the County, 21% of those unemployed were aged 50 or over, 10% had never worked and 34% were long term unemployed. Those who had retired made up 16.1% of the County's population, 6.2% stayed at home to look after family, 11.1% were permanently sick or disabled and 3.5% were economically inactive.

3.5 In 2001, there were 7,515 full-time students and school children aged 16 to 74 living in Carmarthenshire making up 4.3% of the total resident population of the County; of this total student population, 1.8% were economically active, and 4.5% were economically inactive. When questioned with regards to qualifications, 34% of people living within the County stated that they held no qualifications at all; 17.2% were qualified to degree level or higher, slightly lower than the Wales and England figure of 19.8%.

3.6 In Carmarthenshire, there were 73,112 households in 2001. 98% of the resident population lived in households and the remainder of the population lived in communal establishments. The largest proportion of households within the County were one person households accounting for 30%, followed by households containing dependent children at 29%. Pensioners living alone accounted for 17.2% of the total and other pensioner households amounting to 11%. The majority of households, 72.4% were owner occupied, with 14% and 3.1% renting from the Council or Housing Association respectively, and 10.4% renting privately.

3.7 In 1991, the percentage of people who could speak, read and write Welsh was 37%, in the 2001 census it stood at 39%. The percentage of the population that possessed one or more skills in the Welsh language in 2001 stood at 64%. Carmarthenshire ranked as the third highest local authority for possessing Welsh language skills (Gwynedd being first at 76.1%), but this varies greatly within the 58 electoral wards of the county itself. 83.3% of Quarter Bach residents possess one or more skills in Welsh compared with 38.7% of the people in Laugharne Township. Interestingly the two age groups ranking highest in possessing Welsh language skills in Carmarthenshire, are, the 5 to 15 year olds (71.7%) and the 75 and over (72.0%) in comparison to 58.5% of those aged 20-44.

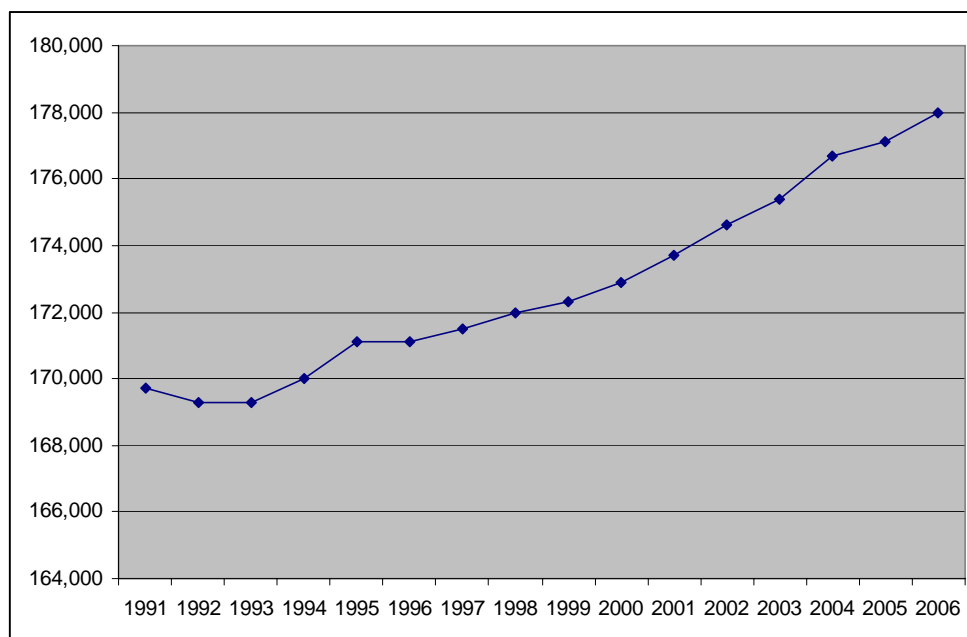
3.8 The average house price for a detached house in Carmarthenshire in 2001 stood at £89,309 which was significantly below the average price for Wales and England at £178,806. The majority, 37%, of Carmarthenshire's residents lived in detached houses, with 34.3% living in semi-detached, 20.8% in terraced houses and 7.4% in flats.

3.9 Reference should be had to the issues paper in respect of housing and the local housing market assessment which provide further background information.

4. Population Trends

4.1 The general trend in the population of Carmarthenshire, as demonstrated by Fig.1 below, reveals that the population in the ten year period from 1991 to 2001, grew by approximately the same amount as the five year period between 2001 and 2006, increases of 4,000 and 4,300 respectively. This illustrates the attractiveness of the County to live and work.

FIG 1: POPULATION CHANGE: CARMARTHESHIRE : 1991-2006



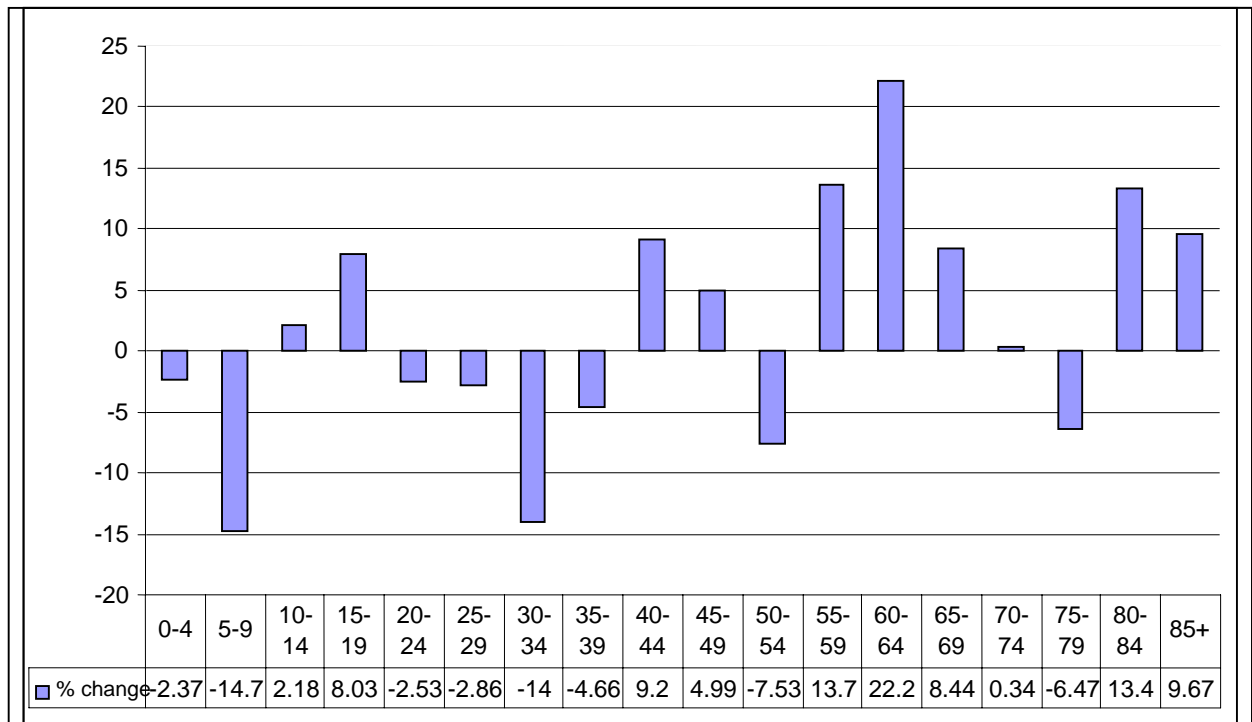
Source: ONS

i. Age Profile

4.2 The demographic profile of Carmarthenshire confirms that the County has a steadily ageing population. Figure 2 demonstrates that the principal changes in the County's demographic population have occurred within the following age categories between 2001-2006:

- Aged 5-9 – 14.7% decrease
- Aged 30-34 – 14% decrease
- Aged 55-59 – 13.7% increase
- Aged 60-64 – 22.2% increase
- Aged 80-84 – 13.4% increase

FIG 2: PERCENTAGE POPULATION CHANGE BY AGE GROUP: 2001-2006



Source: ONS

4.3 When further analysis is undertaken of age groups exhibiting the most significant percentage changes, the results are quite revealing:

- Aged 5-9 years declined from 10,760 to 9,980.
- Aged 30-34 years declined from 10,630 to 9,140.
- Aged 55-59 years increased from 11,800 to 13,460.
- Aged 60-64 years increased from 9,930 to 12,130.
- Aged 80-84 years increased from 4,990 to 5,660

The County's population in line with national trends is exhibiting an increasingly elderly population.

ii. Gender Profile

4.4 **Table 1** illustrates the gender split during the period 2001 to 2006. It is evident that the number of females within the County remains at a higher level than the number of males.

TABLE 1 : POPULATION BY GENDER : CARMARTHENSHIRE 2001-2006

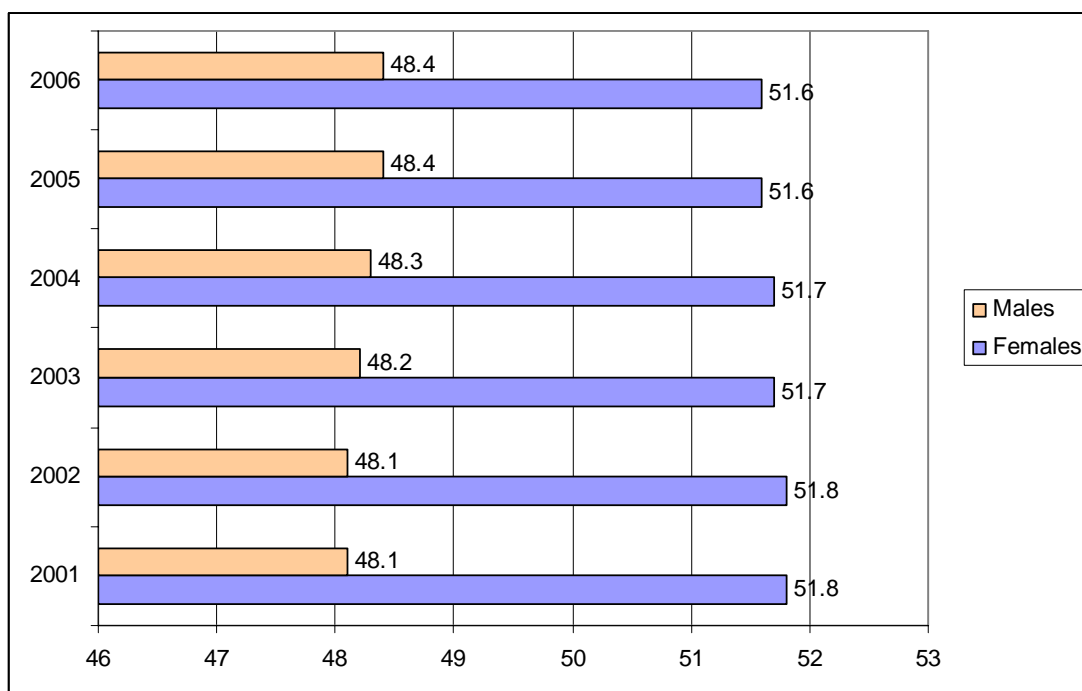
	Females	Males	Total
2001	90,100	83,500	173,600
2002	90,500	84,100	174,600
2003	90,700	84,600	175,400
2004	91,300	85,400	176,700
2005	91,500	85,700	177,100
2006	91,900	86,100	178,000

Source: ONS

Note: Figures may not add up due to rounding.

4.5 The above table reveals that the number of males within the County remains at approximately 7.5% lower than the number of females consistently throughout the period 2001-2006. During the period 2001 to 2006, the percentage of males/females as a proportion of the total population has, in the main, stayed around the same level. However, Figure 4 below illustrates a slight shift, with the percentage of males slightly increasing and number of females slightly decreasing.

FIG 4: % POPULATION BY GENDER 2001-2006



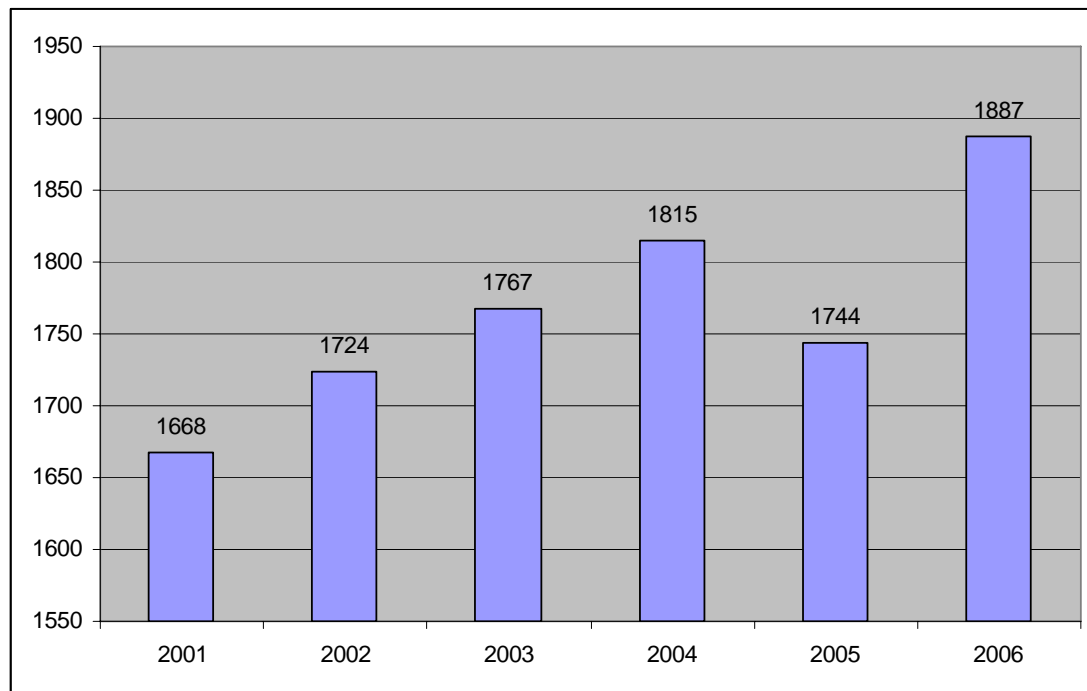
iii. Components of Population Change

4.6 There are two key components to population change, natural increase or decrease and net migration. Natural change is essentially the pattern of live births and deaths, whilst migration is the most volatile of all the components, and is very difficult to estimate with any degree of accuracy.

5. Births

5.1 There were 1,668 live births to mothers living in Carmarthenshire during 2001, which increased to 1,887 in 2006. However, the trend does not show a consistent rise, as is illustrated by Fig 5 the number of births increased steadily between 2001 and 2004, only to decrease by 4% in 2005, and restore the consistent pattern of growth in 2006.

FIG 5: LIVE BIRTHS: CARMARTHENSHIRE 2001-2006



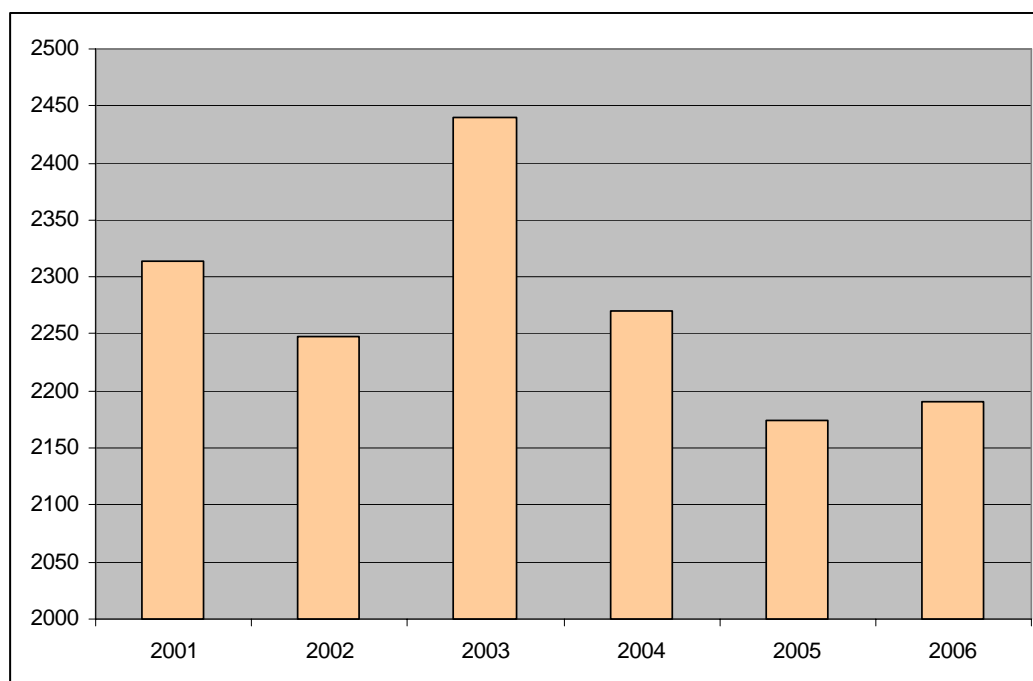
5.2 This increase of 13.1% in births is greater than the Wales average increase of 9.8%, and is higher than the changes for Ceredigion, Pembrokeshire and Swansea. At 2006 the General Fertility Rate for all ages of mother in the County stood at 58.9, only slightly above the Wales average.

5.3 The highest number of live births in 2001 and 2006 were to mothers within the 25-29 age category, with the intermediate years showing a higher proportion within the 30-34 age group. The number of live births to mothers within the 35 to 39 and 40 and over categories has also increased during the period 2001 to 2006.

6. Deaths

6.1 The number of deaths registered in Carmarthenshire in 2006 was 2,190, 5.45% lower than the figure recorded in 2001, despite a rise in the elderly population within the County. Life expectancy at birth in Carmarthenshire in 2006 for males (75.8 years) falls short of the Wales figure of 76.6 years, whilst the female level (81.1 years) is slightly above the Wales figure of 81 years.

FIG 6: REGISTERED DEATHS: CARMARTHENSHIRE 2001 – 2006



7. Migration

7.1 According to the mid year estimates produced by the Office for National Statistics (ONS), Carmarthenshire's population increased from 176,400 in 2004 to 178,000 by mid 2006. With the number of deaths surpassing the number of births by around 300-500 per annum in Carmarthenshire between 2004-2006, net migration is, therefore, a key component of population change in the County, accounting for an approximate increase of 900 to 1200 in the County's population over the same time period.

7.2 Migration between local authorities in Wales and with the rest of the United Kingdom shows that the County has been receiving a net inflow of migrants each year since 2001.

TABLE 2 : INTERNAL MIGRATION : CARMARTHENSHIRE: 2001-2005

Thousands

Year	2000-2001		2001-2002		2002-2003		2003-2004		2004-2005	
	Inflow	Outflow	Inflow	Outflow	Inflow	Outflow	Inflow	Outflow	Inflow	Outflow
All Ages	6.5	5.3	6.7	5.1	6.8	4.6	6.6	4.6	6	4.8
0-15	1.3	0.8	1.4	0.8	1.4	0.7	1.3	0.7	1.1	0.8
16-24	1.2	1.6	1	1.6	1.1	1.4	1.1	1.4	1.1	1.4
25-44	2.1	1.7	2.1	1.6	2.2	1.5	2.1	1.5	2.1	1.6
45-64	1.3	0.7	1.4	0.7	1.6	0.7	1.5	0.7	1.3	0.7
65+	0.6	0.4	0.7	0.3	0.6	0.3	0.7	0.3	0.5	0.4

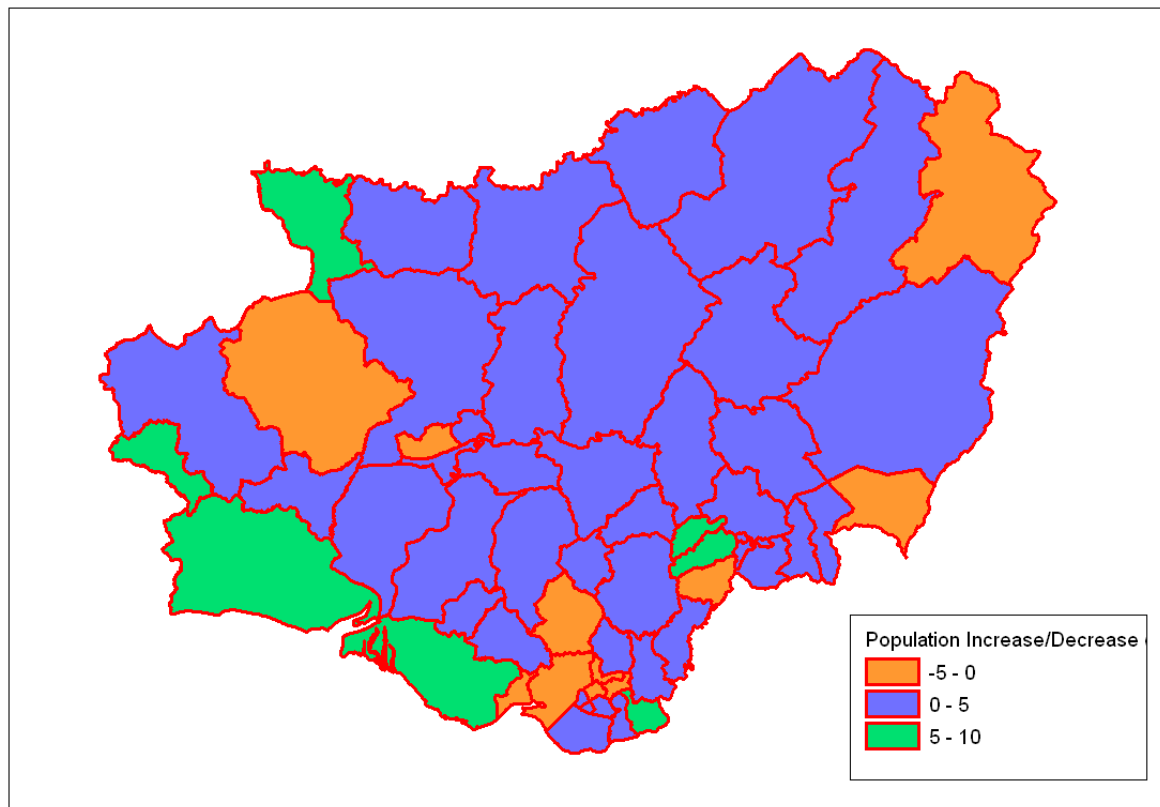
Source: Statswales

7.3 The difference between inflow and outflow in 2000/2001 was +1200, which was the same amount as in 2004/05. The greatest difference between inflow and outflow was witnessed in 2002/03 with a net inflow of 2,200. On age group basis the 25 to 44 age category witnesses the greatest amount of both inflow and outflow in Carmarthenshire, with a broadly consistent level of flows between 2001-2005.

7.4 These flows are internal flows within the UK however international migration has become a major factor in population change in recent years, with the issue of international migration rapidly developing into an integral component in the formation of population estimates on a national, regional and local level. It is widely believed that migration, on a national level, has been underestimated in the past and has been understated in official population estimates for local areas.

8. Changes within the County

8.1 There is very little information available on population change within the County post the 2001 Census, although ONS have produced Experimental Population Estimates for Census Area Statistics (CAS) Wards in England and Wales. These figures are consistent with the published local authority population estimates but although the estimates are produced down to unit level, these are estimates with limitations because of the administrative data sources used to produce them.

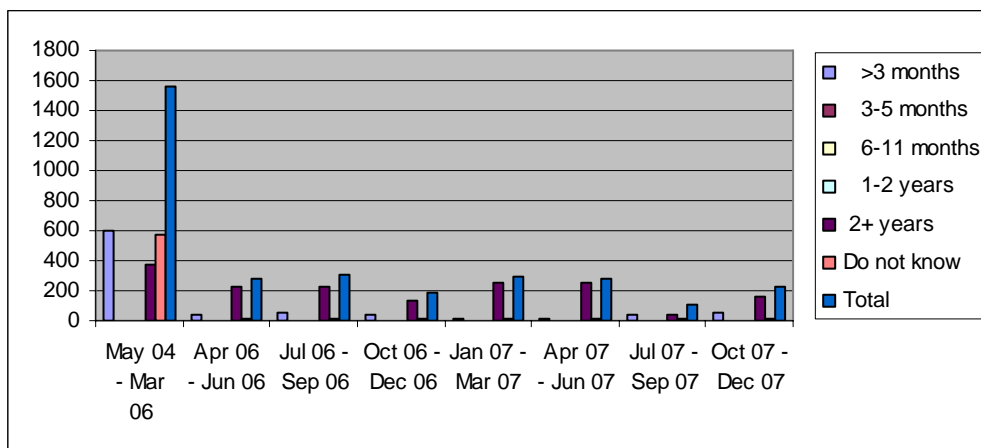


8.2 At the County level there is evidence of a 2.5% increase in population between 2001-2005, with a number of wards exhibiting estimated population increases above this level. Wards including Saron, Bynea, Pembrey, Cenarth and Whitland are estimated to have increased their population in percentage terms, from 7.1% in Whitland to 9.4% in Saron.

9. Migrant Workers

9.1 According to the Workers Registration Scheme, Carmarthenshire has seen 3250 migrant workers enter the County during the period May 2004 to December 2007. There have been approximately 8% more migrant workers entering the area between April 2006 and December 2007 than between May 2004 and March 2006. The majority of the migrant workers who have migrated to Carmarthenshire since 2006 have stipulated their intended length of stay to be over 2 years; this was not the case in the two years previous, with the majority specifying an intended stay of less than 3 months during May 2004 to March 2006.

FIG 7: WORKERS REGISTRATION SCHEME – INTENDED LENGTH OF STAY MAY 2004 TO DECEMBER 2007



Source: Workers Registration Scheme

9.2 However, there is insufficient and incomplete data available on a regional and national level with regards to the numbers of migrant workers in Carmarthenshire to give a true reflection. Data on migrant workers and their families is weak despite the availability of sources of data such as the Workers Registration Scheme for A8 countries which therefore makes future planning problematic.

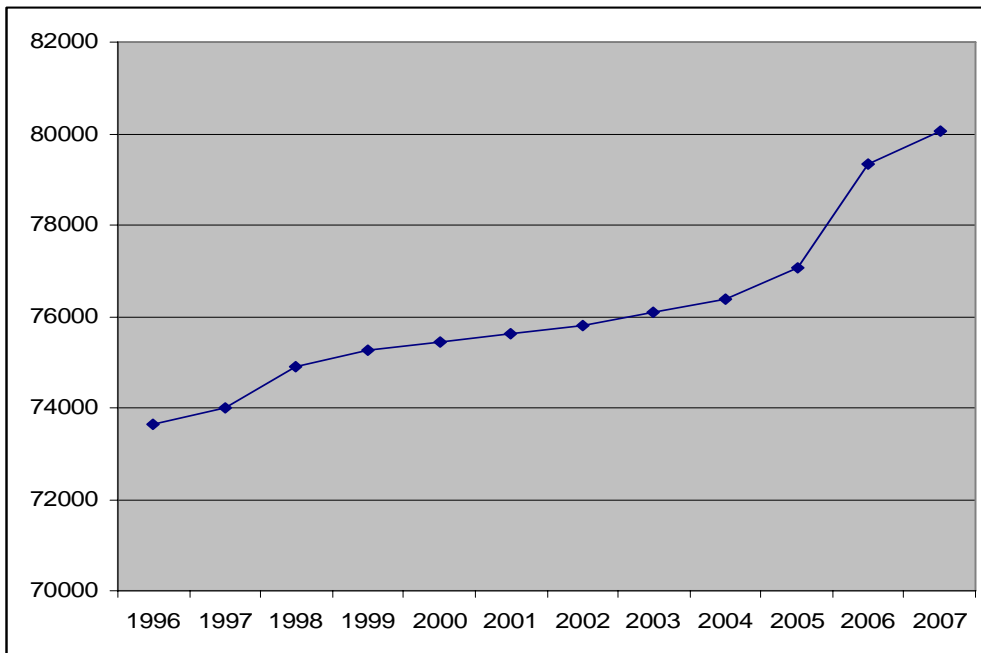
10. Household Trends

10.1 The issue of housing is a critical element for future planning purposes. The 2001 Census recorded that there were 73,112 households within Carmarthenshire, which equated to an average household size of 2.32. According to the Mid-Year Household Estimates for Wales, the average household size in Carmarthenshire has fallen from 2.39 in 1996 to 2.3 in 2004. The annual decrease has been steady at around 0.46%.

10.2 The rise in the number of houses and fall in average household size is a continuation of a long-term national and local trend which can be attributed to certain factors such as the fall in the number of births, a decline in the average number of children per family and a higher instance of single people living alone.

10.3 Fig 8 illustrates that Carmarthenshire's housing stock has continued to rise during the period 1996 to 2007. It is evident that from 2004, there has been a far greater rise in numbers when compared to the steady increase between 1996 and 2004; housing stock numbers increased by 2749 between 1996 and 2004 and by 3674 between 2004 and 2007, a percentage increase of 33%.

FIG 8: DWELLING STOCK: CARMARTHENSHIRE 1996 - 2007



Source: Welsh Assembly Government/Local Government Data Unit

12. Population Projections - Wales

12.1 Population projections are estimates of the population in future years. These projections are based on assumptions with regards to fertility rates, life expectancy and migration, therefore, population projections indicate the potential population should all such assumptions be realised.

12.2 The Office for National Statistics has produced a principal national population projection for Wales based on 2006 and projects population up to 2031. Key results are as follows:

- By 2031, it is expected that the population of Wales will increase by 11%, reaching a total of 3.3 million.
- The percentage of children in Wales currently represent approximately 19% of the total population, however, this will fall to 17% by 2031. Conversely, pensioners currently represent 21% of the total population and this will rise to over 24% by 2031.
- The number of people within the working age category will increase to 8% by 2031.
- As is the case with Carmarthenshire, the Welsh population will become older with the median age increasing from 40.6 in 2006 to 44.3 in 2031.

Fertility

12.3 Analysing past trends, the number of women who were of child bearing age decreased from 592,000 in 1991, to 569,000 in 1999. This figure has, however, increased to 579,000 in mid-2006. During 2008-2019, the number of women of child bearing age is expected to fall from 580,000 to 550,000, before increasing to 560,000 by 2027.

Life Expectancy

12.4 By mid-2031, life expectancy is expected to increase to 82.4 for males and 85.9 for females. This assumption is based on the presumption that the annual rates of mortality improvement will converge to a common rate of 1.0 per cent a year at 2031 for most ages.

Birth and Death Rates

12.5 Examining birth and death rates during the late 1990's and early 2000's, the number of deaths has been consistently higher than the number of births. Conversely, mid 2005 to mid 2006 witnessed a transposition of this trend, with birth rates exceeding death rates by 1900. Over the coming years, births are expected to continue to increase before remaining at around 35,000 during 2009-2019. The period up until 2031 will then see a decrease in the birth rate to around 33,000. Over the next 4 years, the death rate in Wales is projected to decrease to some extent before stabilising at around 30,000 between 2012 and 2021. It is then expected that the number of deaths will gradually increase to 34,000 by 2031.

Migration

12.6 The inflow and outflow of migrants into Wales on an annual basis can make it extremely difficult to project future trends. The increase in population in Wales over the last two has been increasingly affected by net migration from the rest of the UK and abroad. In the 2006-based national population projections, the long-term (from 2012 onwards) assumption for net migration is +9,500. This includes a +7,500 long-term cross-border (within UK) net migration assumption and a +2,000 long-term international net migration assumption. The long-term migration assumption for the 2004-based projections was +11,500.

12.7 For the first twenty years of the projected time period, natural change is expected to be positive with an approximately equal number of births and deaths from 2026 to 2031. The change in total population is projected to be high with in the region of a 70,000 to 75,000 increase for each five year period during the first fifteen years of the projected time period. It is expected to decrease to around 47,000 during the 2026-2031 period.

Age Groups

12.8 It is evident from the projections that as the age structure of Wales will change of the projected time period, the number of dependent people, both children and people of pensionable age, will increase.

12.9 In 2006, there were approximately 310 children per 1000 people of working age and this is expected to remain fairly constant, with around 290 to 300 children per 1000 people by 2031. In 2006, there were also 340 people of pensionable age per 1000 people of working age, and this figure is likely to increase to 420 by 2031.

12.10 During the period between 1971 and 2006, the number of dependents per 1000 people decreased; although the number of people of pensionable age increased during this time period, the number of children decreased, therefore leading to an overall decrease in dependents. Between 1971 and 2006, the number of dependents fell from 732 to 657, however, by 2031, this number is projected to increase to 710.

Carmarthenshire Population Projections

12.11 The Assembly are in the process of producing sub national projections for Unitary Authorities in Wales based on a "bottom up" approach rather than using the Wales projections as a control total for UA's. It is understood there will be a principal projection based of past trends and some variant projections will also be produced such as natural change projections. The Assembly will be using Popgroup a family of software developed to forecast population, households and the labour force for areas and social groups. It is based on Excel to build on users' existing spreadsheet skills. The software has been used to forecast national and sub-national populations, as well as social and

ethnic groups. It uses standard demographic methods of cohort component projections, household headship rates and economic activity rates. Its flexibility allows integration of official statistics and ancillary data. Unitary Authority trend based population projections are likely to be published in June 2008 with household projections in 2009. The County Council have purchased the POGROUP software and will be running their own policy based projections in due course.