

## Note to Address Matters Arising from the Initial Hearings

### Matter 3 – Action Point 7

17 June 2024

The Inspectors at the hearing on 12<sup>th</sup> June 2024 requested additional information regarding the evidence of suppressed demographic growth in Oxford specifically. The Inspectors requested the following: Council to provide table equivalent to table 3.5 of HENA for Oxford City. This note addresses this issue.

The 2021 Census showed notable issues with the accuracy of ONS projections for Oxford. The 2018-based Sub-National Population Projections (SNPP) had been projecting a population in 2021 of 152,900 in Oxford (HENA Table 3.4), just 1,000 persons greater than the population figure a decade earlier (151,900, as shown in HENA Table 3.3).

When the Census was published it showed a population in 2021 of 162,100 (HENA Table 3.4). Whilst this was above that in the ONS 2018-based SNPP, it represented the weakest population growth in Oxfordshire, as HENA Table 3.3 shows. **Whilst Oxfordshire's population grew by 10.9% (71,500 persons) between 2011-21, Oxford City's population grew by just 6.7%.**

There is a correlation between this population growth and growth in dwellings. As the table below shows, whilst the dwelling stock increased by an average of 0.8% per annum across England between 2011-21, 0.9% across the South East and 1.2% across Oxfordshire, the growth in dwellings in Oxford was 0.3% per annum. The more limited population growth is influenced by the constrained land supply within the City.

**Table 1: Analysis of Net Change in Dwellings, 2011-21**

	Dwellings, 2011	Dwellings, 2021	Change, 2011-21	% Annual Dwelling Stock Growth CAGR
Cherwell	59,018	69,201	10,183	1.6%
Oxford	57,217	58,980	1,763	0.3%
South Oxfordshire	56,644	64,439	7,795	1.3%
Vale of White Horse	51,020	60,448	9,428	1.7%
West Oxfordshire	45,580	51,077	5,497	1.1%
Oxfordshire	269,479	304,145	34,666	1.2%
South East	3,694,388	4,026,333	331,945	0.9%
England	22,976,066	24,927,588	1,951,522	0.8%

Source: DLUHC Live Table 122 (Dwelling Stock Estimates by Local Authority District)

HENA Table 3.5 compared growth in the age structure in Oxfordshire in 2021 to that in the 2018-based Sub-National Population Projections. It showed a larger population across a range of age groups, particularly those aged 25-39 living in the County than the ONS had been projecting in their Sub-National Population Projections. In contrast the population in age groups over 70 was lower.

The table below provides an equivalent table for Oxford City, comparing the Census age structure to that projected by the 2014-based SNPP. Whilst similarly we see a lower population aged over 70, the evidence also shows fewer people aged 20-24, and those aged under 14 and in their 30s. Some of the trends shown are a function of trends we see nationally: lower births and higher deaths than projected in the 2014-based SNPP feeding into lower numbers of children under 10 and people aged 65+. But the reduction in the population under 10 has been particularly pronounced, and also correlated with a reduction in adults in their 30s and 40s living in the City. Considered alongside other data, such as the household formation information

and weak growth in dwelling stock, this points to residents having to move out of the City to form secure family housing.

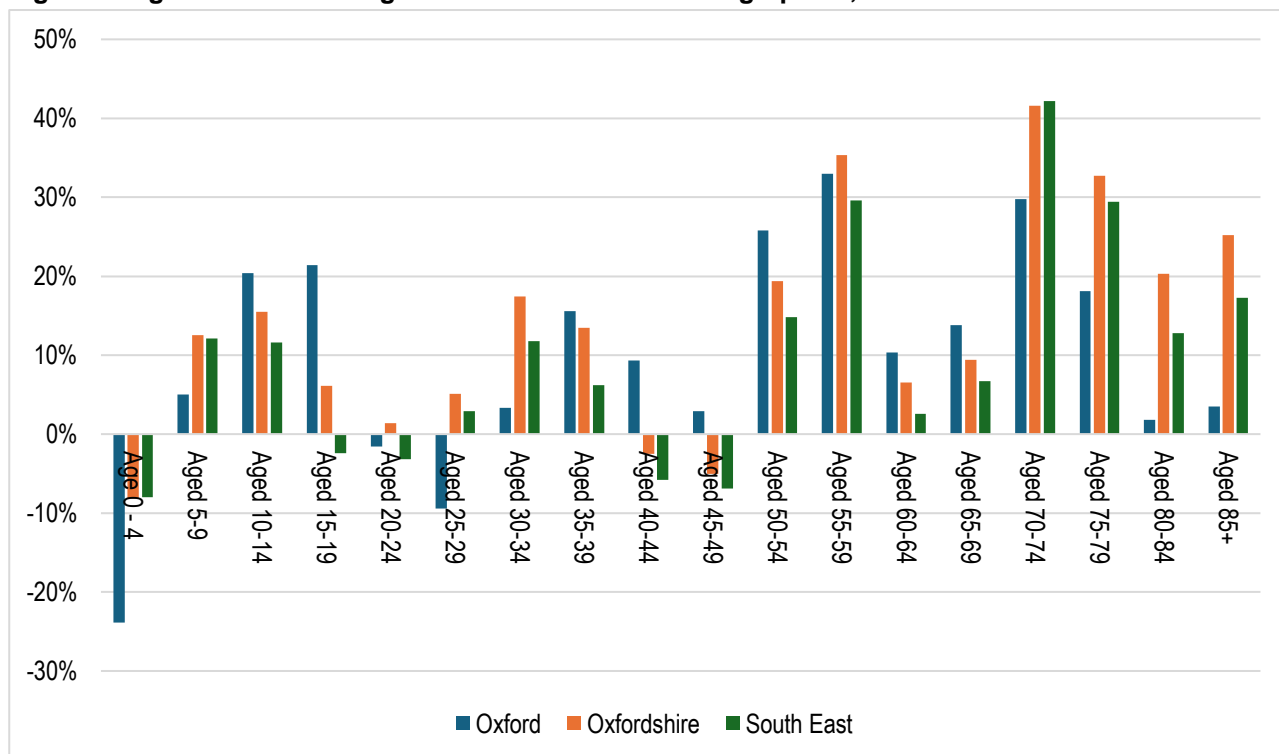
**Table 2: Comparing Population Estimates and projections for 2021 – Oxford**

	SNPP (for 2021) – as in 2014-based SNPP	Census (2021)	Census difference from SNPP
0-4	9,724	7,137	-2,587
5-9	9,403	7,852	-1,551
10-14	9,299	8,650	-649
15-19	12,556	15,874	3,318
20-24	24,152	21,992	-2,160
25-29	14,937	15,362	425
30-34	13,883	13,309	-574
35-39	11,780	10,997	-783
40-44	9,681	9,643	-38
45-49	8,277	8,805	528
50-54	8,239	8,809	570
55-59	7,960	8,198	238
60-64	6,465	6,443	-22
65-69	5,337	5,224	-113
70-74	5,027	4,864	-163
75-79	3,800	3,543	-257
80-84	2,740	2,568	-172
85+	3,153	2,770	-383
TOTAL	166,412	162,040	-4,372

Source: 2021 Census; ONS 2014-based Sub-National Population Projections

Alongside Table 2 above, it is useful to consider how the population in key age groups in Oxford has changed over the 2011-21 decade. Table 3 and Figure 1 below do so, drawn from ONS Mid-Year Population Estimates.

**Figure 1: Age Structure Changes – Oxford and Wider Geographies, 2011-21**



Source: ONS Mid-Year Population Estimates

**Table 3: Age Structure Changes in Oxford, 2011 – 2021**

	2011	2021	Change, 2011-21	% Change, 2011-21
Age 0 - 4	9,176	6,987	-2,189	-23.9%
Aged 5-9	7,389	7,759	370	5.0%
Aged 10-14	7,163	8,626	1,463	20.4%
Aged 15-19	11,775	14,292	2,517	21.4%
Aged 20-24	22,380	22,020	-360	-1.6%
Aged 25-29	16,736	15,156	-1,580	-9.4%
Aged 30-34	12,883	13,314	431	3.3%
Aged 35-39	9,541	11,032	1,491	15.6%
Aged 40-44	8,863	9,689	826	9.3%
Aged 45-49	8,527	8,777	250	2.9%
Aged 50-54	7,016	8,823	1,807	25.8%
Aged 55-59	6,189	8,232	2,043	33.0%
Aged 60-64	5,908	6,517	609	10.3%
Aged 65-69	4,656	5,300	644	13.8%
Aged 70-74	3,738	4,853	1,115	29.8%
Aged 75-79	3,080	3,638	558	18.1%
Aged 80-84	2,527	2,572	45	1.8%
Aged 85+	2,698	2,792	94	3.5%
<b>All Ages</b>	<b>150,245</b>	<b>160,379</b>	<b>10,134</b>	<b>6.7%</b>
Aged 0 to 15	25,100	25,088	-12	0.0%
Aged 16 to 64	108,446	116,136	7,690	7.1%
Aged 65+	16,699	19,155	2,456	14.7%

Source: ONS Mid-Year Population Estimates

Whilst the population overall has been growing, albeit more weakly than other areas, as described above; we have seen an absolute reduction in the population in their 20s and proportionally a very strong reduction in those aged 0-4.

When we come to look at the ability of households to form, the suppression of household formation in Oxford is particularly apparent. Relating Tables 4 and 5, whilst the population aged 25-34 fell by -1,149 persons, the number of people in this age group who are a head of a household has fallen much more dramatically, reducing by -2,576. Equally, whilst the population aged 35-49 increased by 2,567 persons, the number of people in this age group who were a head of household fell by -290.

**Table 4: Age of Household Reference Person, 2011-21**

	2011	2021	Change	% change
Aged 24 years and under	3,753	3,037	-716	-19.1%
Aged 25 to 34 years	12,309	9,733	-2,576	-20.9%
Aged 35 to 49 years	15,870	15,580	-290	-1.8%
Aged 50 to 64 years	12,264	14,544	2,280	18.6%
Aged 65 years and over	11,179	12,325	1,146	10.3%
Total	55,375	55,219	-156	-0.3%

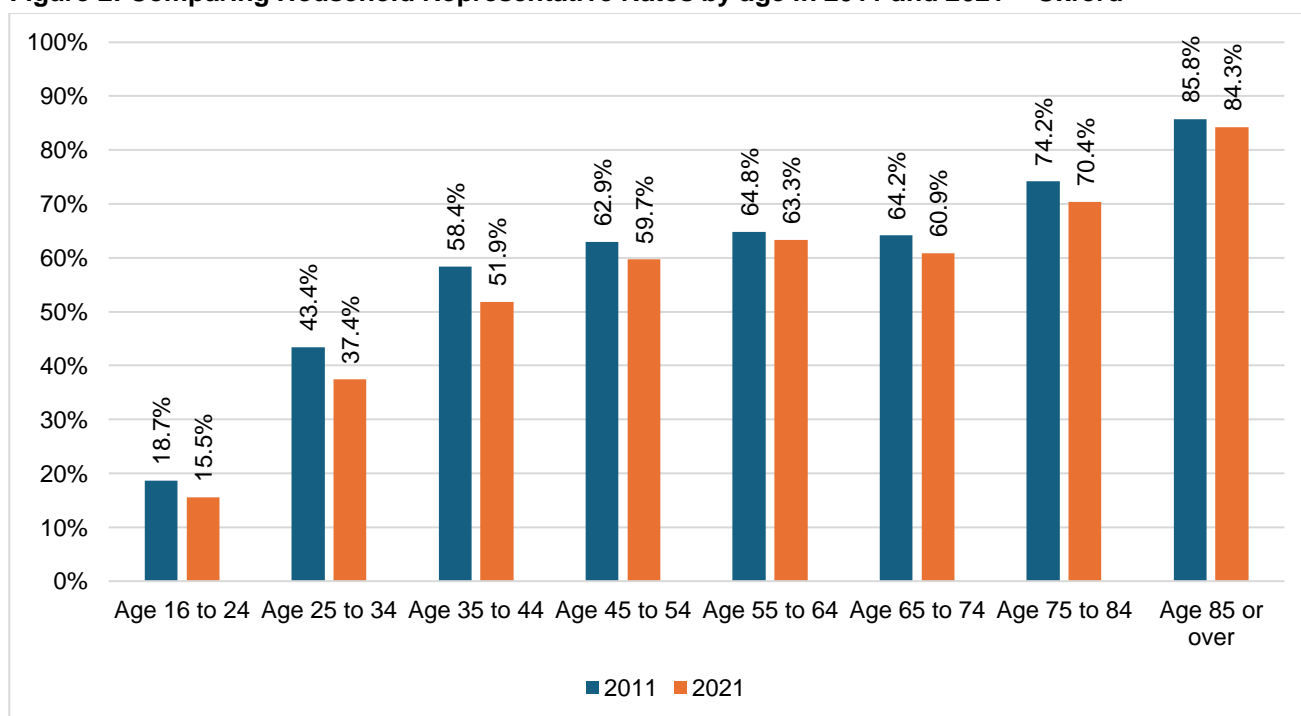
Source: 2011 Census, 2021 Census

The chart below draws this together to indicate what proportion of the population in different age groups are a household representative (head of household). It shows that over just a single decade (2011-21), this has fallen quite dramatically amongst younger age groups in the City. The evidence indicates:

- The proportion of households aged 25-34 who are a head of a household has fallen from 43 to 37% - a 6 percentage point drop;
- The proportion of households aged 35-44 who are a head of a household has also fallen from 58% to 52% - again a 6 percentage point drop.

The (workplace-based) affordability ratio over this period has risen from 8.77 in 2011 to 12.16 in 2021. The evidence points to particular challenges for younger households in forming in the City.

**Figure 2: Comparing Household Representative Rates by age in 2011 and 2021 – Oxford**



Source: ONS

For those households who are able to form, the evidence suggests more households will have to rent for longer, with the proportion of household reference persons aged 16-64 who are home owners in Oxford falling from 43.6% in 2011 to 39.8% in 2021. The evidence points to households in the City having to rent for longer.

**Table 5: Tenure Profile of Household Reference Persons aged 16-64 in Oxford, 2011 and 2021**

16-64	2011	2021	pp Change
Owned	43.6%	39.8%	-3.8%
Social Rented	20.3%	20.3%	0.0%
Private Rented	36.1%	39.9%	3.7%

Source: 2011 Census, 2021 Census

Bringing the evidence together, there is clear evidence of suppression of demographic growth in the City:

- The City has seen weak growth in dwellings, with the dwelling stock growing at a third of the regional rate and a quarter of that seen across Oxfordshire;
- This is borne out in its weaker population growth and the out-movement of family households to surrounding areas to find homes;
- It is also evident in significant reductions in the ability of younger household to form, with significant reductions in household formation amongst those aged 25-34 and 35-44;
- For those households who are able to form, the ability to become home owners has also fallen influenced by the affordability characteristics, with associated growth in households renting privately.