



Census 2021:

Population and Migration

Topic Report

August 2024

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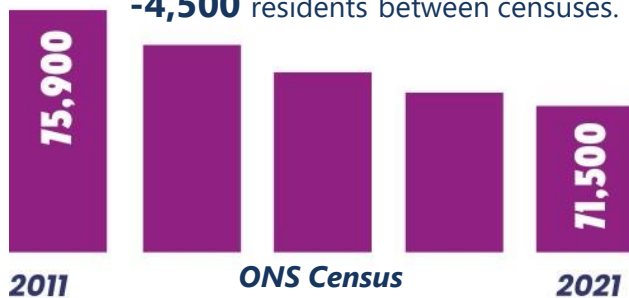
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Key Headlines

Population declined by 5.8%

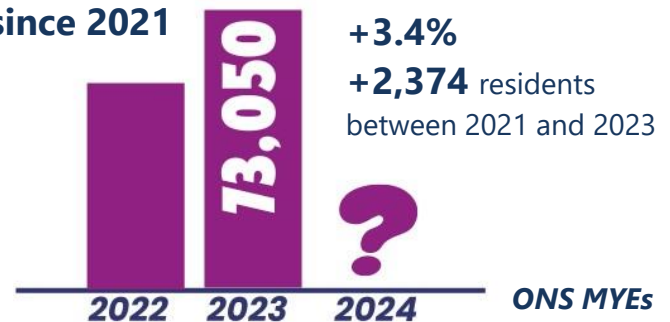
-4,500 residents between censuses.



Population has been increasing since 2021

+3.4%

+2,374 residents between 2021 and 2023



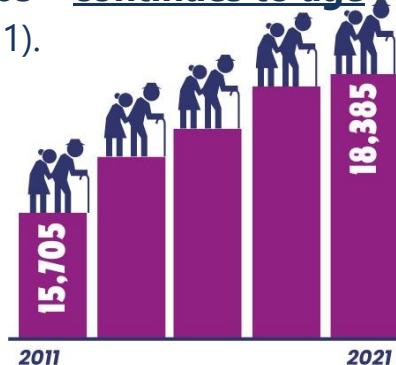
Population decline between 2011 and 2021 was driven by **negative net migration** and to a lesser extent **negative natural change**.



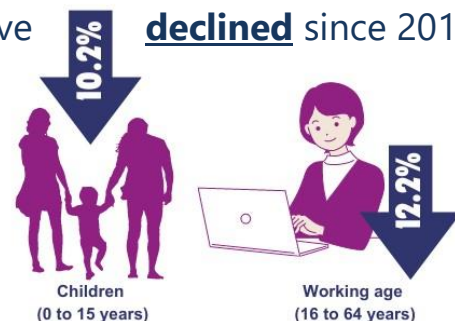
Population aged 65+ continues to age (+17.2% since 2011).

due to:

- Improvements in life expectancy
- Ageing of baby boomers
- Lower birth rates
- Inward migration of older adults



Number of **children** and people of **working age** have declined since 2011.



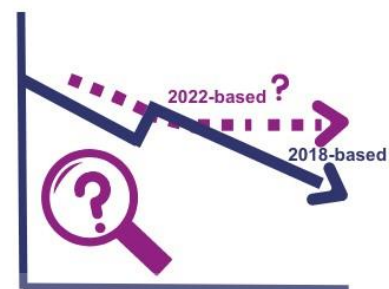
Number of **students** have declined by approximately 30% since 2011.



*COVID-19 pandemic may have impacted a students place of residence on enumeration day. Changes may have been *temporary* for some.

Latest population projections (2018-based) estimate a **continuing decline**.

*New projections (2022-based) *could* project a more gradual decline due to recent increases in population.



Executive Summary

Overview

This Topic Paper is part of Ceredigion County Council's series of five bespoke reports analysing the results of the 2021 Census. This report explores the recent population change in Ceredigion and how demographic trends may change in the future. Understanding how Ceredigion's population is changing, and how this will affect the demand for a range of services, is vital for service planning, funding allocations, and commissioning.

Key findings



The 2021 Census was undertaken during the **COVID-19 pandemic**, and therefore caution should be taken when interpreting the results as the data will have aspects **unique to the pandemic** and **may not** reflect current times.



The **demographic dynamics** of Ceredigion have undergone **notable** changes since the previous census in 2011.



Ceredigion's **population declined by 5.8%** (equivalent to a loss of 4,500 residents) between 2011 and 2021, at the same time, the population of Wales grew by 1.4%. Ceredigion experienced the greatest population decline nationally.



Positively, in **recent years**, there has been a **notable reversal** in the decade long population decline. Since 2021, **Ceredigion's population has been increasing**, from 70,676 in 2021 to 73,050 (+3.4%/ 2,374), according to the Office for National Statistics (ONS) mid-year-estimates (MYEs). The main driver of this increase is **positive internal net migration** of young adults (i.e., more people moving into the county from across the UK, than leaving the county).



Several potential reasons are put forward for the recent estimated population increase; a return to pre-pandemic student numbers, less young people leaving the county, and/or a correction of the potential 2021 Census student population undercount, are to name a few, however, it is **too early** to determine exactly what is happening at this stage. This is a **positive trend**, particularly after a decade of depopulation.



Between the two censuses (2011 and 2021), Ceredigion's **population continued to age** as life expectancy increased slightly (albeit at a slower pace) and fertility rates stalled. This changing age structure **poses several challenges** for the Council as it seeks to adapt its services to the changing needs of the population and ensure its services are sustainable in the future.



The **number of children** (aged 0 to 15) and **people of working age** (aged 16 to 64) has **declined** over the decade, attributed to lower birth rates and the out-migration of adults. Whereas **residents aged 65 years and over** have **increased substantially**. In addition to improvements in life expectancy, this growth is influenced by the inward migration of older adults, and the ageing of the significant age cohort of the post-World War II baby boom generation.



Ceredigion's population is **heavily influenced by the number of students** enrolling at the universities. It is likely that the 2021 Census **undercounted** the number of students usually residing in Ceredigion, as the **Covid-19 Pandemic restrictions** led to alterations in student's living arrangements. However, what is conclusive is that the student population has **declined** significantly since 2011, by approximately 30%, which is supported by various sources (Census and HESA).



The census provided information on **resident's country of birth**, and there have been some **marginal changes** since 2011. Residents who were **born in Wales** continue to make up **most of the population**, with 5 in 10 people in Ceredigion born in Wales in 2021. There are **lower numbers of Welsh-born and English born** residents in Ceredigion compared to 2011 (albeit very small changes proportionally), and a slightly **higher proportion** of residents born overseas.



The Welsh Government's **2018-based local authority projection** suggests that **depopulation** will continue in Ceredigion. However, the 2018-based projections are **outdated**, and only consider trends prior to 2018 and do not account for the most recent increase in population (2021 to 2023).



The **new 2022-based projections** will be published in **2025**, and it is likely that these will estimate a **smaller decrease** over the 25-year period. However, if the positive trends continue (as seen during 2021 to 2023), it is possible that future projections (such as the 2024-based), *may reverse the trend of population decline entirely*.

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1.0 Introduction

1.1 Background

This Topic Paper is part of Ceredigion County Council's series of five bespoke reports analysing the results of the 2021 Census. The report explores the recent population change in Ceredigion and how this may change in the future. Understanding how Ceredigion's population is changing, and how this will affect the demand for a range of services, is vital for service planning, funding allocations, and commissioning. There are many uncertainties around current and future population estimates, therefore several different sources will be explored within this analysis. Primarily census data will be analysed, however, other administrative sources, such as the Office for National Statistics (ONS) Mid-Year Estimates, Welsh Government's Local Authority Population Projections, and the Higher Education Statistics Agency (HESA) data, will be used.

1.2 Census and Mid-Year-Estimates

The census takes place every ten-years and is a legislative process governed by the Census Act 1920. Residents are required to complete the census by law, which makes it the most authoritative data source on the population. Between each census, the size and structure of the population is estimated by the ONS to produce the mid-year population estimates (MYEs). MYEs are produced using the previous census estimate, which is then rolled forward each year, by adding births, subtracting deaths, and estimating net-migration. The population is estimated at mid-year (30th of June). The drivers of population growth (births, deaths, and migration) are referred to as components of change.

The latest census in Wales and England took place on the 21st of March 2021 and was carried out by the ONS. It provides a snapshot of the usual resident population¹ of Ceredigion on this date and gives an insight into how our local population has changed over the last decade. The census is a vital source of information for local government policy making and planning the delivery of public services. In addition, it is used as a baseline for population estimates and projections.

1.3 Reconciliation and Rebasing of MYEs

Over the ten-year period between censuses, the MYEs can 'drift' away from the next census results. The ONS expect this, and it is standard practice to investigate the size and cause of the drift, to rebase the population estimates accordingly. This results in the previously used 'historical set' of MYEs, rolled forward from the 2011 Census, and a set of re-based MYEs, based on the latest, 2021 Census. This process is particularly important following the 2021 Census as the COVID-19 pandemic is likely to have increased the uncertainty around the MYEs more than usual. The process and outcome of the reconciliation and re-basing exercise for Ceredigion is explained in Section 3.1.

¹ Usual resident population is anyone who on Census Day (21st of March 2021), was in the UK and had stayed or intended to stay in the UK for a period of 12 months or more or had a permanent UK address and was outside the UK and intended to be outside of the UK for less than 12 months.

1.4 COVID-19 Pandemic

It is worth noting that Census 2021 took place during a period of extraordinary upheaval. At the time of enumeration (21st of March 2021), the UK was still under the third national lockdown restrictions due to the COVID-19 Pandemic. In Wales, the 'stay local' rule² had just been enforced and students were not allowed back to university campuses. Therefore, it is very likely that the COVID-19 pandemic impacted normal population patterns and people's place of usual residence. For example, students, young people on furlough and migrant workers from abroad, may have temporarily relocated to family homes outside of the County. It is likely that this disturbance to people's place of usual residence (in particular students) had a negative impact on Ceredigion's population.

It is assumed that the population estimates recorded by the census are accurate (the methodology is robust and the ONS undertake a very rigorous quality assurance process), however, the period in which the data was captured (March 2021), will have aspects unique to the pandemic and therefore do not reflect current times. Census data needs to be viewed in this context, as a 'snapshot in time' as of the population on March 21st, 2021.

This Topic Paper will cover two main sections: an overview of population changes in Wales, and a detailed analysis of population change in Ceredigion.

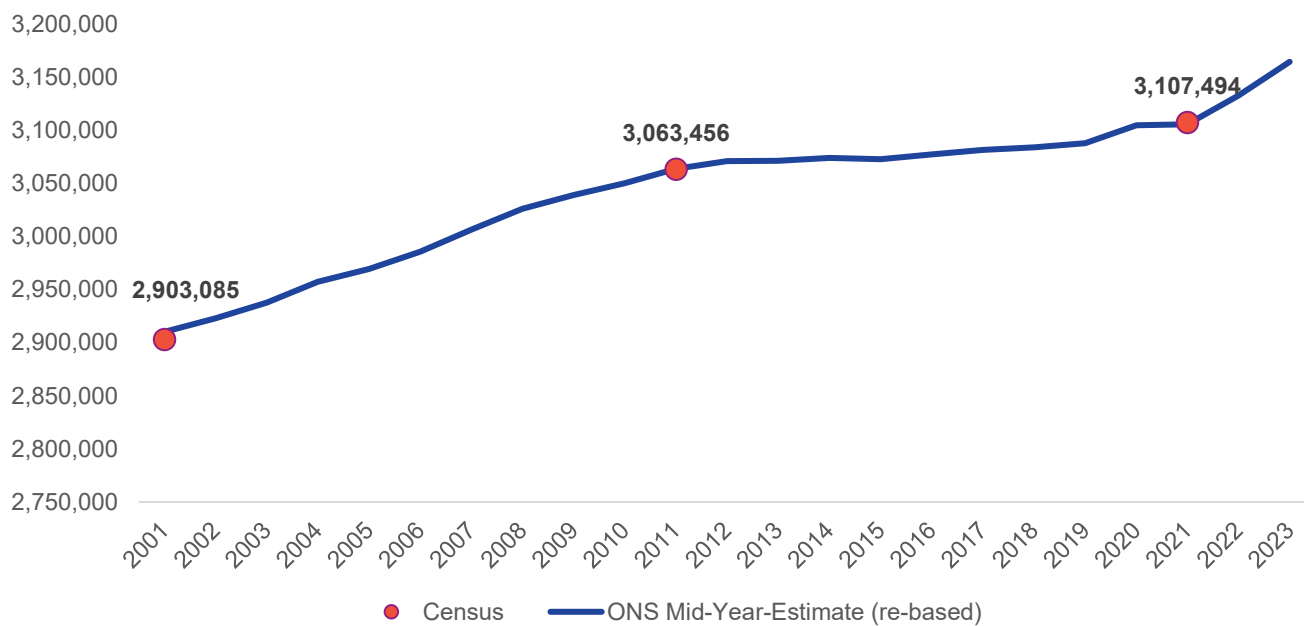
2.0 Wales: an overview

2.1 Population Change

According to the 2021 Census, there were 3.107 million Welsh usual residents in 2021. The population continues to increase in Wales and the most recent census reports the largest population ever recorded, however, the level of growth is starting to slow (Figure 1). Between the 2001 and 2011 Census, the population of Wales grew by 5.5% (+160,400 residents), however, between 2011 and 2021 Census, this reduced to 1.4% (+44,000 residents). The rate of population growth in Wales (1.4%) was considerably lower than in England, where the population increased by 6.6%. Furthermore, all English regions had a higher population growth than Wales. In the two years following the 2021 Census, the population of Wales has grown at a faster rate, by 1.8% to 3,164,000 (2021 to 2023). The driver of this population increase is largely due to net migration, which is explained further in Section 2.3 Components of Change.

² The stay local rule meant that people could leave their homes and travel within their local area – usually within 5 miles.

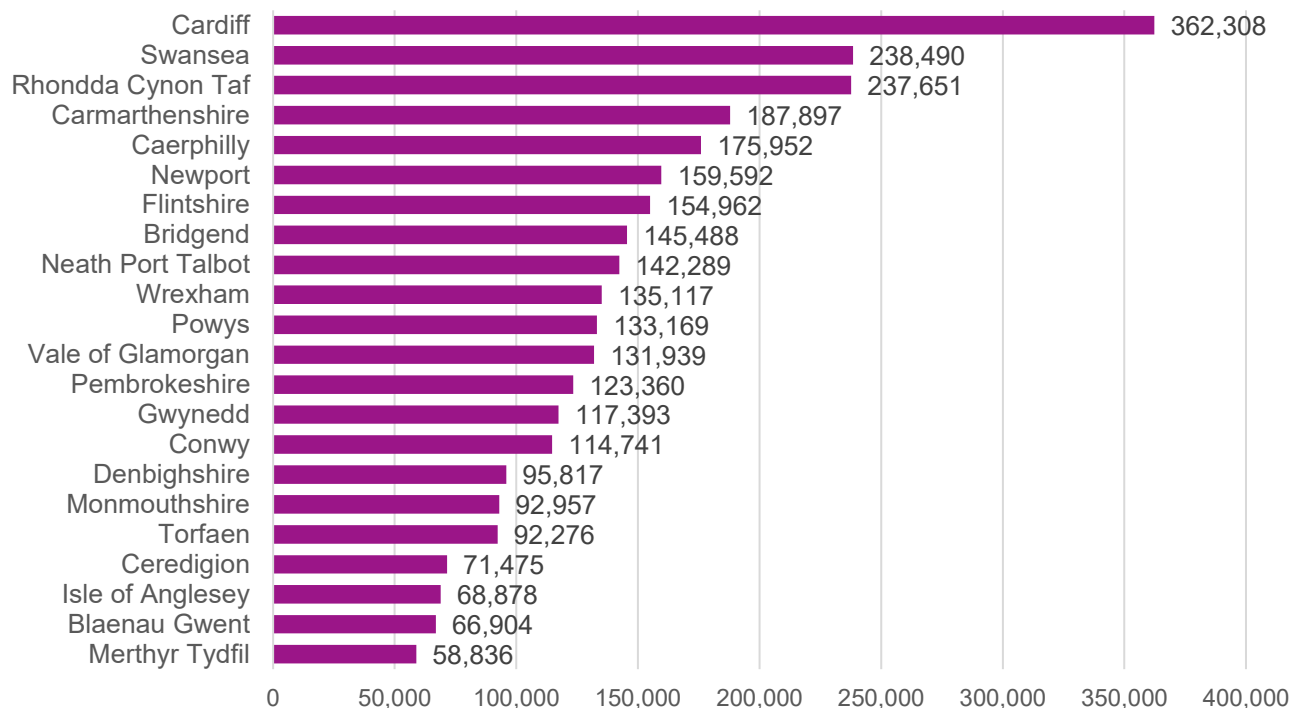
Figure 1: Wales usual resident population MYEs and Census



Source: ONS, Census 1981, 2001, 2011 and 2021; ONS Mid-Year Estimates (1981-2022).³⁴

Figure 2 below outlines the estimated population of the twenty-two Welsh local authorities on the 21st of March 2021. The local authority with the largest population in 2021 was Cardiff (362,400 residents), whilst the local authority with the smallest population was Merthyr Tydfil (58,800 residents).

Figure 2: Usual resident population by local authority area, Wales, 2021



Source: ONS (2023), Census 2021.⁵

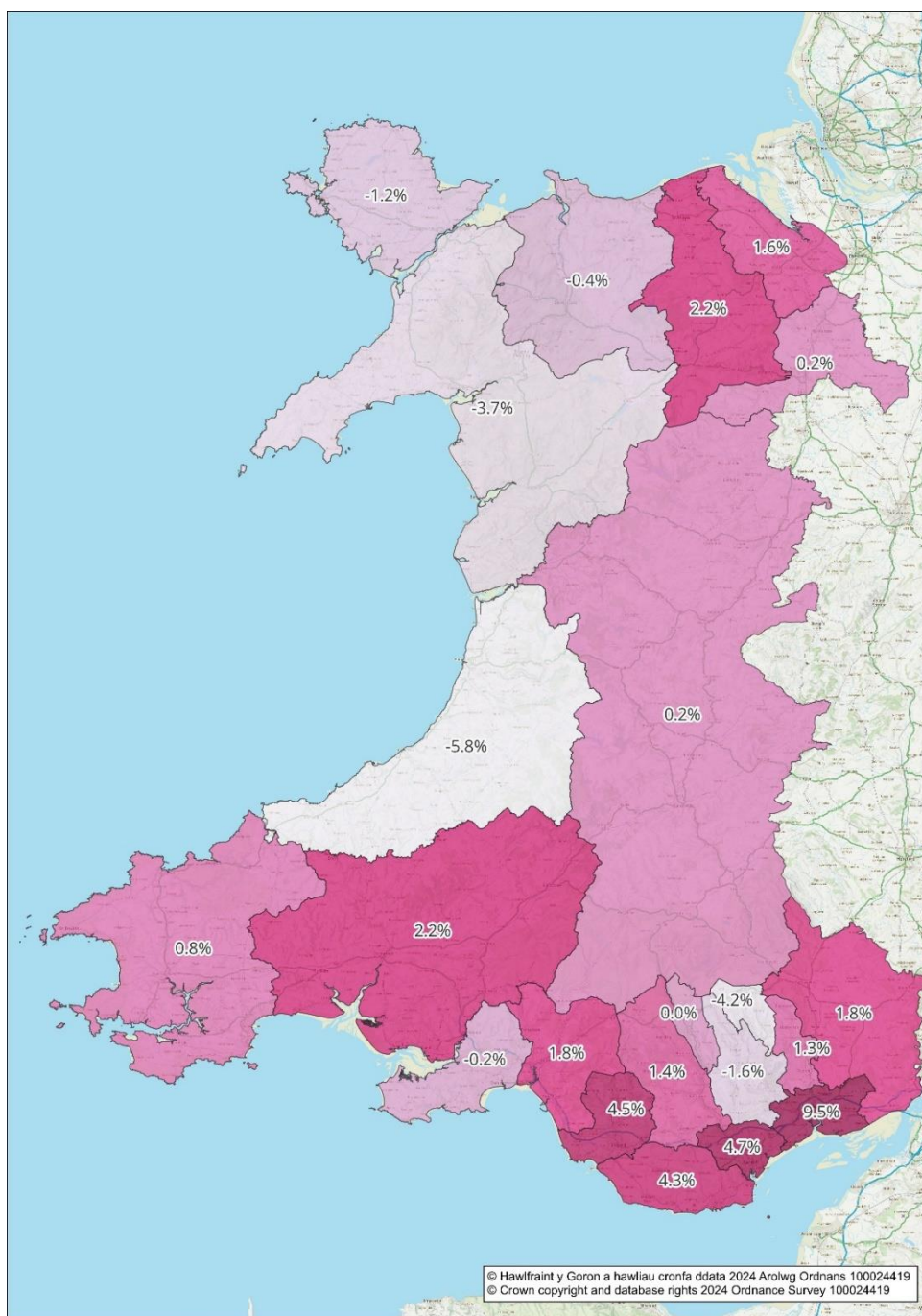
³ ONS (2023). Estimates of the population for England and Wales. Available at: [Estimates of the population for England and Wales - Office for National Statistics \(ons.gov.uk\)](https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/articles/estimates-of-the-population-for-england-and-wales/2023-01-18)

⁴ NOMIS (2022). Census of population. Available at: [Census of Population - Data Sources - home - Nomis - Official Census and Labour Market Statistics \(nomisweb.co.uk\)](https://www.nomisweb.co.uk/census/2021/population)

⁵ ONS (2023). TS001 – Number of usual residents in households and communal establishments. Available at: [Nomis - Official Census and](#)

Different local authorities have experienced varying degrees of population change (see Figure 3 below). The local authorities south of the M4 corridor have experienced higher population growth over the decade (2011 to 2021). Newport experienced the greatest population increase across Wales (9.5%), which is higher than both the Wales (1.4%) and England (6.6%) average. In contrast, seven local authorities reported lower populations in 2021 compared to 2011, the greatest declines were experienced in Ceredigion (5.8%), Blaenau Gwent (4.2%) and Gwynedd (3.7%). Out of the 22 local authority areas, Ceredigion experienced the greatest population decline over the decade.

Figure 3: Population change across twenty-two local authorities in Wales, between 2011 and 2021 censuses.



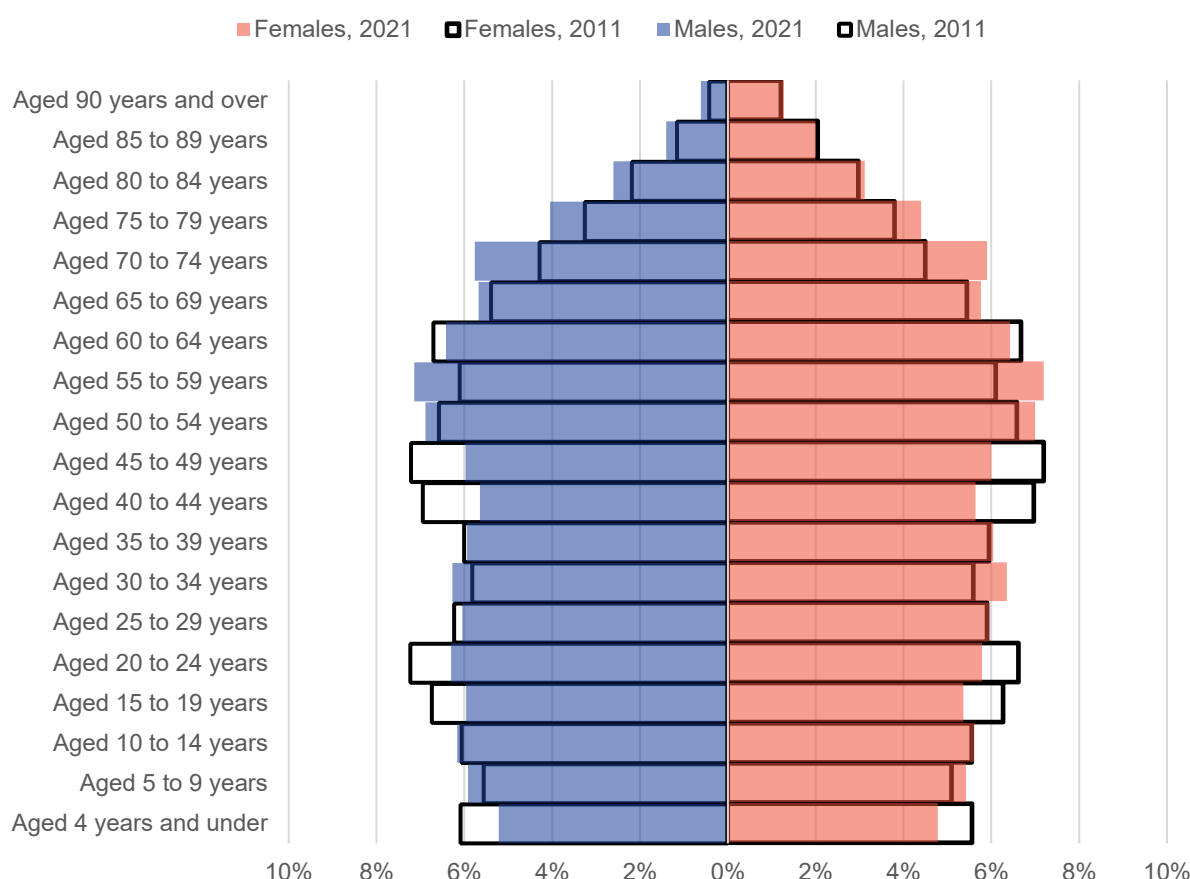
Source: ONS – 2011 and 2021 Census.

Notably, population change in certain local authorities may reflect how the COVID-19 pandemic affected people's choice of usual residence on Census Day. These changes may not reflect current times and the latest information from the MYEs could suggest that the changes in a resident's usual place of residence were temporary for some local authorities.

2.2 Age and sex structure

There continues to be a slightly higher proportion of women compared to men in Wales and the trend of population ageing has continued, with a growing proportion of individuals aged 65 years and over. Figure 4 below outlines the age and sex structure of Wales in 2011 and 2021, as recorded by the censuses.

Figure 4: Age and Sex Population 2011 and 2021, Wales



Source: ONS, 2011 and 2021 Census.

Very little has changed in the ratio between men and women in Wales since the 2011 Census. The 2021 Census estimated that there were 1,586,600 women (51.1% of the overall population) and 1,521,000 men (48.9%) in Wales in 2021 (compared to 50.9% female and 49.1% male in 2011).

The age distribution in Wales, however, has significantly changed since 2011. There are now more people than ever in the older age groups, and a trend of population decline for working age residents and children over the decade is evident. Over one-fifth of the Welsh population in 2021 were aged 65 years and over (21.3%/ 622,043 residents), this is an increase of 17.7% (+99,499) since the 2011 Census. In 2021, nearly two

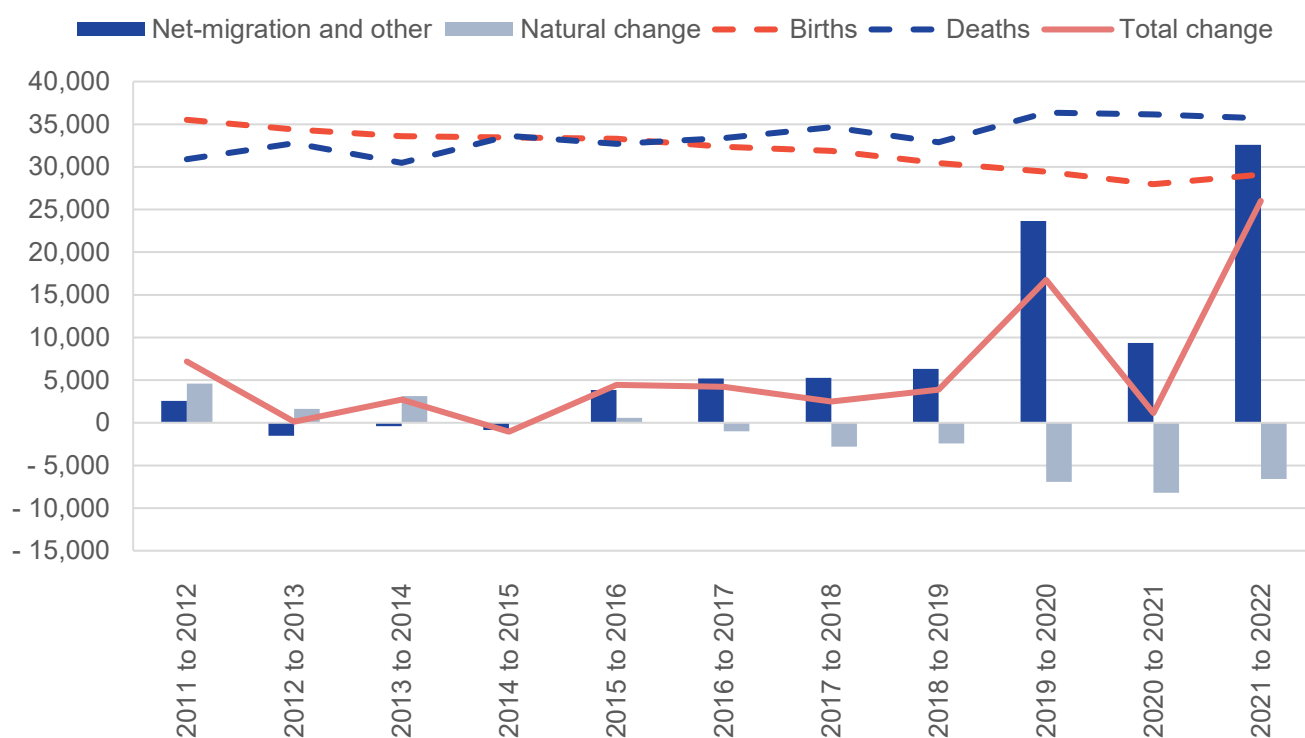
thirds of the Welsh population were aged 16 to 64 (61.1%/ 1,931,800), a decrease of 2.4% (-49,984) since 2011. The remaining 16.5% (513,800) of the population in Wales in 2021 were children (aged 15 years and under). Similarly, the size of this age group has experienced a slight decrease since 2011 (-1.0%), when 16.9% (519,128) were aged 15 years and under.

Across the 22 local authority areas the distribution of ages varied. Areas with a higher percentage of older people were generally located in Mid and North Wales, whilst the younger populations resided in the urbanised areas of South Wales.

2.3 Components of change

Examination of the components of population change for Wales reveals the factors that have driven the population increase since 2011. The drivers of population growth in Wales have changed considerably over the last decade, net migration has become a larger contributor of population increase than natural change⁶ (i.e., the difference between births and deaths). Between mid-2011 and mid-2014, the increase in population in Wales was driven by natural change, whereas, from 2014 onwards, net migration⁷ exceeded natural change (refer to Figure 5 below).

Figure 5: Drivers of Wales population growth, mid-2011 to mid-2022



Source: Stats Wales (2024), Components of population change, by time period and component.

Birth rates have generally declined, with the lowest number of births ever recorded in mid-2020 (27,972), whilst death rates have seen a slight increase, peaking at 36,359 deaths during mid-2019. Internal and international migration have increased significantly, with the highest net migration figure ever recorded in mid-2022, at 32,586. This is substantially higher than in mid-2011 when net migration was 8,434. To put this into context, 121.6% of the population increase between 2011 and 2021 was due to the direct

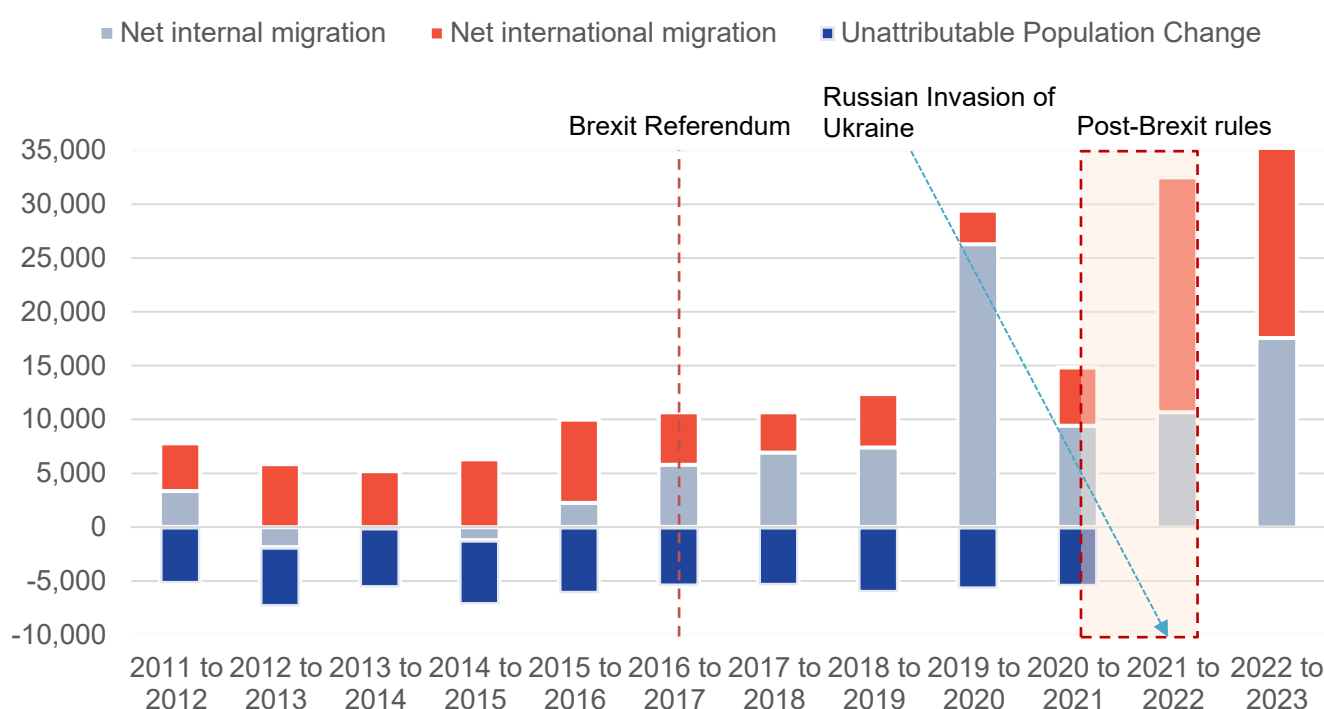
⁶ Natural change: the birth rate minus the death rate of a particular population, over a particular time period.

⁷ Net migration: is the net flow of migrants into and out of an area. It is immigration minus emigration.

contribution of net migration. This percentage is above 100% because the natural change in the population was negative, meaning net migration not only compensated for the natural decrease but also contributed to an overall increase.

Looking at migration patterns more closely between 2011 and 2022, the recent spike in net-migration is largely due to international migration (see Figure 6 below). There was a dip in net migration during 2020 and the first half of 2021, before immigration increased to a record high in the year ending 2022. These trends were also experienced on a UK scale.

Figure 6: Internal and International Migration, 2011 to 2022, Wales.



Source: Stats Wales (2024), Components of population change, by time period and component.

The recent marked change in migration patterns in Wales (and the UK as a whole) since 2021 is driven by several factors. Net migration has been driven by a rise in non-EU immigration (those arriving on humanitarian routes, in addition to students and workers).⁸ The ending of the free movement of those from the European Union coupled with the introduction of a new immigration system in January 2021, the easing of COVID-19 restrictions in May 2022, and external events such as the war in Ukraine (February 2022), have all had an impact. Due to the combination of these factors, the ONS have described the period leading up to the end of 2022 as “unique”.⁹

In conclusion, the alteration to the key drivers of population change since 2011, moving from a population growth based on natural change (births exceeding deaths) to net migration (immigration exceeding

⁸ ONS (2023). Long-term international, migration, provisional: year ending June 2023. Available at: [Long-term international migration, provisional - Office for National Statistics \(ons.gov.uk\)](https://www.ons.gov.uk/peoplepopulationandcommunity/migrationandimmigration/bulletins/longterminternationalmigrationprovisional/202306)

⁹ ONS (2023). Long-term international migration, provisional: year ending December 2022. Available at: [Long-term international migration, provisional - Office for National Statistics \(ons.gov.uk\)](https://www.ons.gov.uk/peoplepopulationandcommunity/migrationandimmigration/bulletins/longterminternationalmigrationprovisional/202212)

emigration), can be attributed to several different factors, such as an ageing population, declining fertility rates, the negative impact of COVID-19 on deaths, and changing migration patterns (as referenced above).

3.0 Ceredigion: an overview

The following sections will provide an overview of Ceredigion's population, and how it has changed since 2011, analysing the age and sex structure and the components contributing to these changes. Subsequent chapters analyse demographic data and trends at a local authority level. To view the population change between 2011 and 2021 across smaller geographical areas in Ceredigion, such as Lower Super Output Areas (LSOAs), refer to Appendix 1.

Before discussing the population dynamics in Ceredigion, it is important to first explain the reconciliation and rebasing exercise undertaken by ONS, which occurs each time a census is undertaken. By understanding the differences between the historical and re-based MYEs, users can ensure the most accurate and relevant data in decision-making is used.

3.1 Reconciliation and Rebasing of Ceredigion's MYEs following 2021 Census

Reconciliation is the process of comparing the new official mid-year estimates for mid-2021 (derived from using Census 2021-data), with the mid-year population estimates for mid-2021 (which would have been developed in the absence of a census i.e., mid-2021 estimates rolled forward from mid-2020 estimates).¹⁰ The comparison between the two different types of population estimates shows how much inter-censal drift there has been.

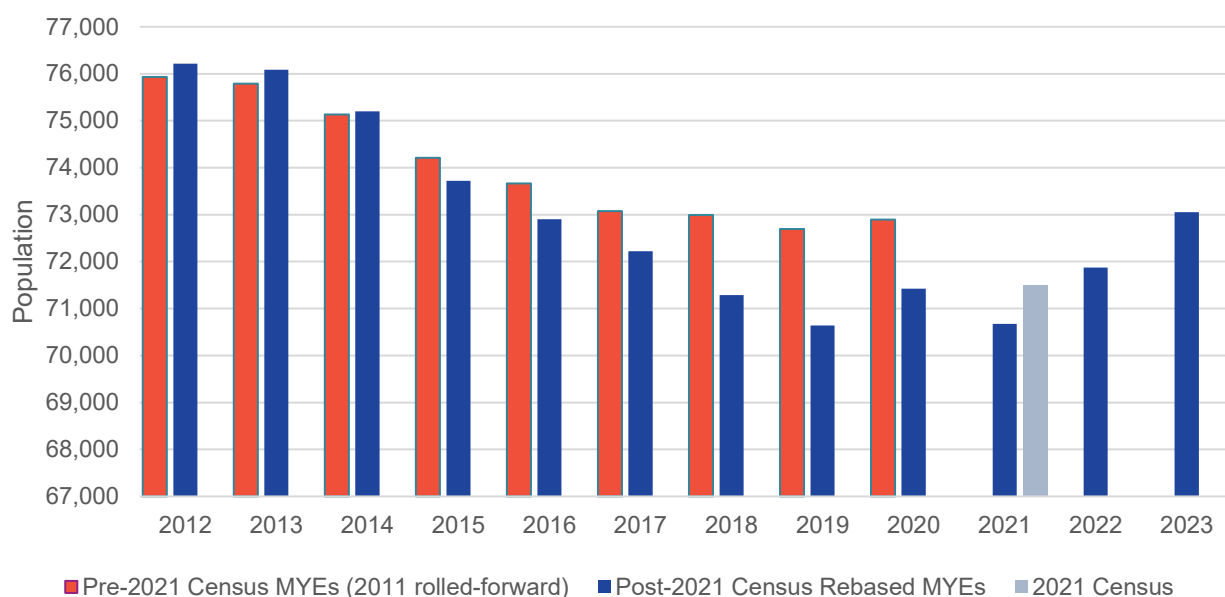
While rebasing follows on from the reconciliation process and aims to spread the differences observed out across the last decade,¹¹ this corrects any discrepancies that might have accumulated over time due to estimation errors. The rebasing exercise undertaken by ONS adjusts the historical estimates (2011 rolled forward MYEs) to align with the new 2021 Census data, resulting in the rebased MYEs (2012 to 2020). The rebased estimates are the official population estimates, replacing the existing series from mid-2012 to mid-2020. If using the MYEs for planning, resource allocation or projections it is important to be aware of the rebasing process and consider the impacts it has on the use of historical ONS population statistics.

It is acknowledged that different sets of mid-year-estimates provided after a census can cause confusion. Figure 7 below outlines the 2011 rolled forward MYEs (referred to as the pre-2021 Census MYEs), the re-based MYEs (referred to as the Post-2021 Census MYEs), and the 2021 Census population figure for Ceredigion.

¹⁰ ONS (2022). Rebasing and reconciliation of mid-year population estimates following Census 2021, England and Wales: 2022. Available at: [Rebasing and reconciliation of mid-year population estimates following Census 2021, England and Wales - Office for National Statistics \(ons.gov.uk\)](https://ons.gov.uk/rebasing-and-reconciliation-of-mid-year-population-estimates-following-census-2021-england-and-wales)

¹¹ Ibid.

Figure 7: Pre- and Post-2021 Census MYEs for Ceredigion (2012 to 2023)



Source: ONS, *Mid-Year Estimates (2012 to 2023)*¹², ONS, *Mid-Year Estimates*¹³

As reflected above, there is a difference between the pre-2021 Census MYEs and the post-2021 Census rebased MYEs, particularly as we move further away from the previous Census in 2011. The pre-2021 Census MYEs show a higher population than the post-2021 Census rebased MYEs between 2015 and 2020, which increases with time. This 'drift' is expected with increased distance from a Census, as the reliability of the MYEs is reduced.

At a glance, the differences between the rolled forward and re-based estimates suggest an overestimation in the pre-2021 Census MYEs (2011 Census rolled-forward). ONS found that local authorities in Wales generally experienced a slight overestimate in the rolled forward MYEs compared with the rebased MYEs, which was largely attributed to the migration component. An ONS reconciliation report¹⁴ attributed the disparity between the rolled forward estimates and census-based estimates for Ceredigion (+1,836/2.53%), to the highly mobile student population. ONS suggest that the overestimate of the mid-to-late 20s and underestimate of residents in their mid-30s is related to the difficulty recording graduates following the end of their studies. However, it is essential to approach this assumption of overestimation with caution, due to our concerns relating to the potential undercounting of the 2021 Census population figure for Ceredigion (as reflected in Section 3.4 Student Population).

While the rebased MYEs are officially considered more accurate, the unique circumstances of the 2021 Census require careful consideration. The re-based estimates include more recent data and information on key drivers of population change, which is hoped to have corrected the 2021 Census undercount. However, it is difficult to understand the extent of this correction. The Research Team will continue to consult with ONS and ensure that any uncertainties are clearly communicated to senior management.

¹² ONS (2024). Estimates of the population for the UK, England, Wales, Scotland, and Northern Ireland. Available at: [Estimates of the population for the UK, England, Wales, Scotland, and Northern Ireland - Office for National Statistics \(ons.gov.uk\)](https://www.ons.gov.uk/population/population-estimates)

¹³ ONS (2021). Population estimates for the UK, England, Wales, Scotland, and Northern Ireland. Available at: [Population Estimates for UK, England and Wales, Scotland and Northern Ireland - Office for National Statistics \(ons.gov.uk\)](https://www.ons.gov.uk/population/population-estimates)

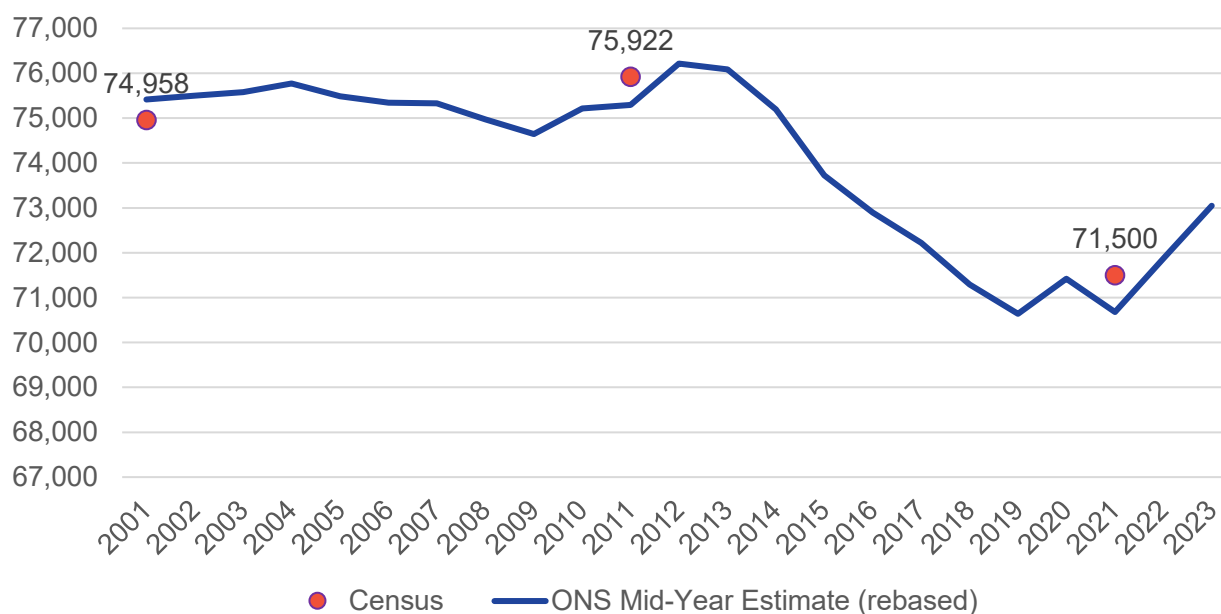
¹⁴ ONS (2023). Reconciliation of mid-year population estimates with Census 2021 at local authority level. Available at: [Reconciliation of mid-year population estimates with Census 2021 at local authority level - Office for National Statistics \(ons.gov.uk\)](https://www.ons.gov.uk/population/population-estimates)

3.2 Population change

In 2021, the population of Ceredigion was 71,468 which is a decrease of 5.8% since the previous census held in 2011 (Figure 8).¹⁵ This is notably lower than the 1.4% growth recorded for Wales (refer to Chapter 2.0) and is the greatest decline across all 22 local authority areas. The population decline over this period is supported by the re-based Mid-Year-Estimates (MYEs) series¹⁶, which declined from a peak of 76,215 in 2012 to 70,676 in 2021.

Recently however, the trend from 2021 to 2023 shows a notable reversal in population decline observed over the previous decade. It is estimated that the resident population has increased by 3.4% (+2,374 residents) from 70,676 in mid-2021 to 73,050 in mid-2023. The drivers of this recent increase are explored in Section 3.6 Components of Population Change.

Figure 8: Ceredigion usual resident population (2001-2023), Census and Mid-Year-Estimates



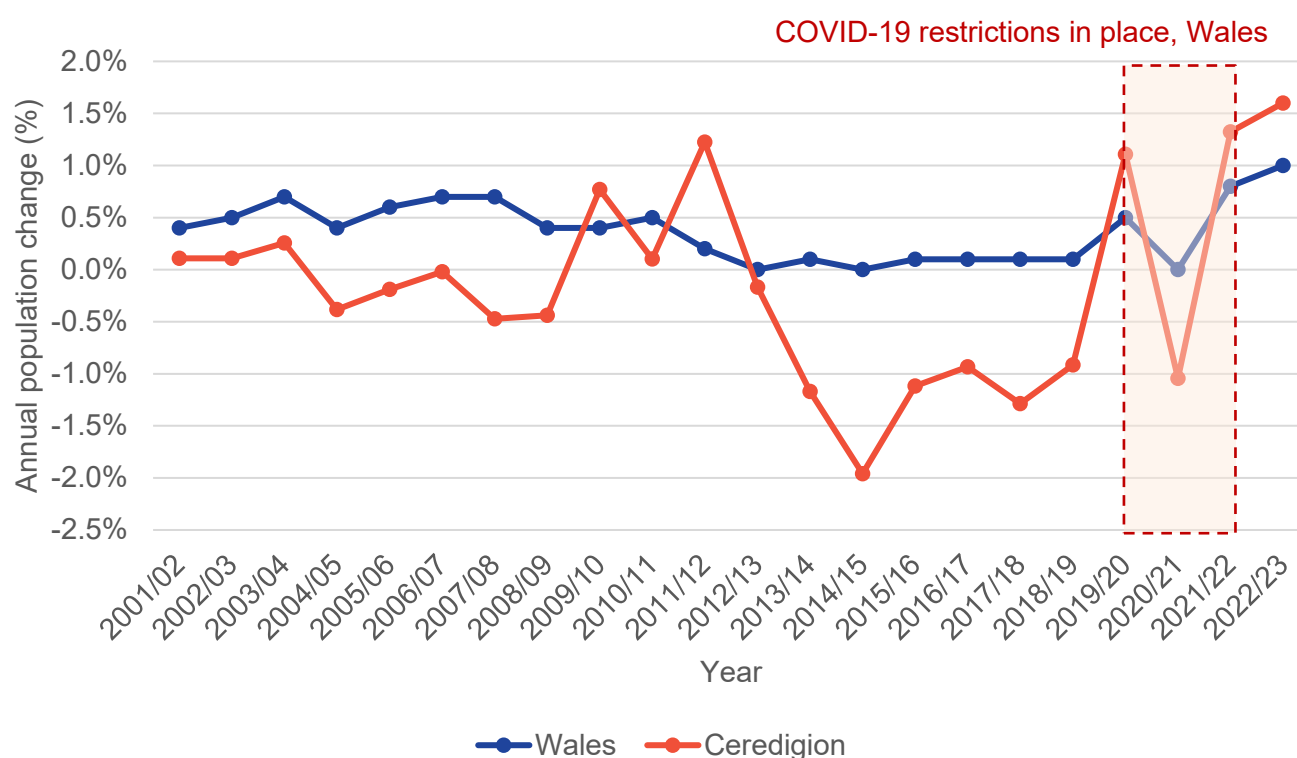
Source: ONS, Census 2001, 2011 and 2021; ONS Mid-Year Estimates (2001-2022).

To gain a better understanding of population change in Ceredigion and how this compares to the national average, Figure 9 below outlines annual population change between 2001 and 2023. The population growth rate in Ceredigion is substantially lower and more volatile than the national growth rate. Generally, Ceredigion experienced negative annual growth rates, whereas Wales experienced positive annual growth rates over the 20-year period (2001 to 2021). Between 2011 and 2021, Ceredigion experienced a population decline with an annual growth rate of -1.06%, while Wales saw the population increase with an annual growth rate of 0.14%. The impact of the COVID-19 pandemic on population growth due to travel restrictions is clearly demonstrated.

¹⁵ Stats Wales (2022). Usual resident population by age and local authority. Available at [Usual resident population by age and local authority \(gov.wales\)](https://www.gov.wales/usual-resident-population-by-age-and-local-authority)

¹⁶ The rebased Mid-Year-Estimates (2012-2021) are used and are therefore slightly different to historical data. Post-Census, the ONS undertake a rebasing and reconciliation process to better align the MYEs with the Census estimate. These estimates become the official population estimates, replacing the existing series from mid-2012 to mid-2020.

Figure 9: Annual population growth rates, 2001 to 2023, Wales and Ceredigion



Source: ONS, Mid-Year-Estimates 2001-2023.

Notably, the rate of population growth in Ceredigion and across Wales between 2022/23 was higher than at any point in the last 20 years. For Ceredigion, this modest growth in the population is largely driven by internal migration, whilst across Wales the increase is mainly a product of international migration.

3.3 Age and sex structure

Ceredigion's population has continued to age over the decade as life expectancy continues to increase slightly (albeit at a slower pace) and fertility rates begin to stall, this changing age structure poses a number of challenges for the Council as it seeks to adapt its services to the changing needs of the population. The changing age structure of Ceredigion's population across the three broad age groups between 2011 and 2021 are summarised in Table 1 below.

Table 1: Population and population change by three broad age groups, Ceredigion (2011 to 2021)

Age group	2011	2011	2021	2021	2011 to 2021 (Change)	
	number	percent	number	percent	number	percent
Children (0 to 15)	11,230	14.8%	10,081	14.1%	-1,149	-10.2%
Working age (16 to 64)	48,987	64.5%	43,002	60.2%	-5,985	-12.2%
Older age (65+)	15,705	20.7%	18,385	25.7%	+2,680	+17.2%
Total	75,922	100.0%	71,468	100.0%	-4,454	-5.8%

*Figures may not sum due to rounding

Source: ONS, 2021 Census (TS009)

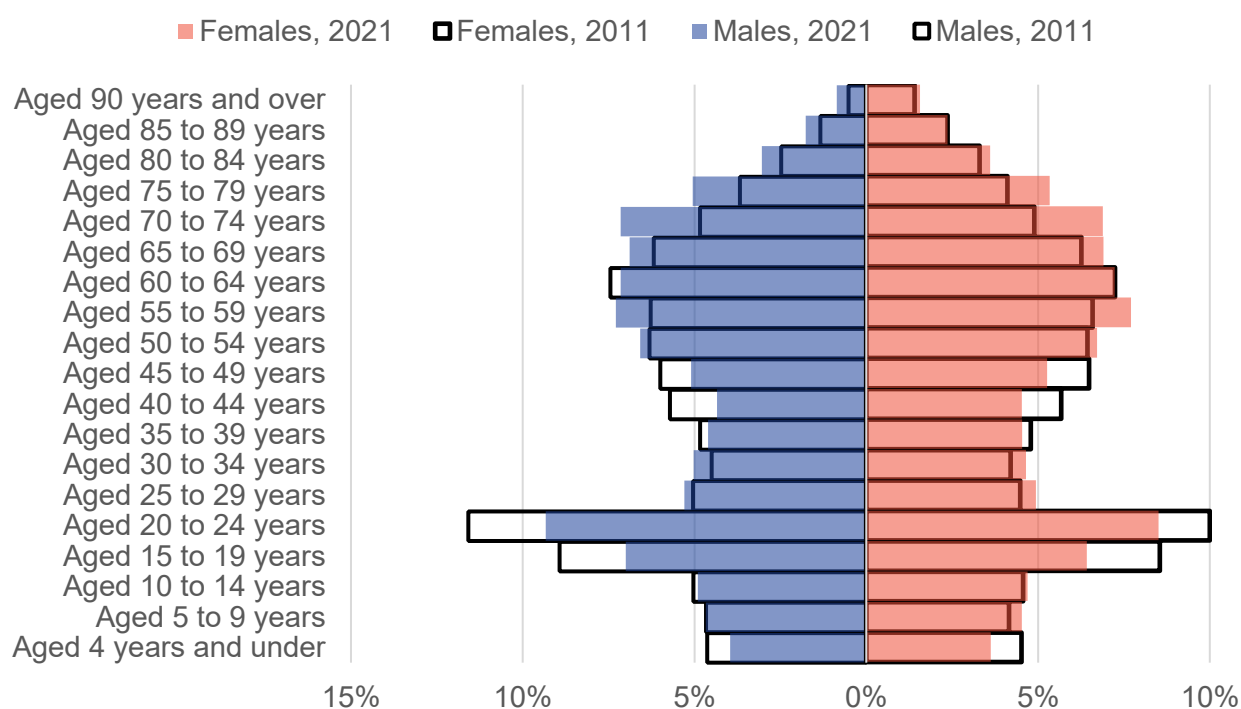
Residents over the age of 65 are the only group where growth has occurred, this population has increased by 17.2% (+2,680) since the 2011 Census, and now comprises 25.6% of the total resident population. By comparison, across Wales, 21.3% of the total population were aged 65 and over. In addition to longer life expectancy, this growth is influenced by the ageing of the significant age cohort of the post-World War II baby boom generation, who in 2021 would be aged between 57 to 75.

The number of children (aged 0 to 15) and people of working age (aged 16 to 64) has declined over the decade. The number of children has reduced by 10.2% (-1,149), and in 2021 comprised of 14.1% of the total population. This decline can be attributed to lower birth rates in Ceredigion (which is in line with the national trend) and illustrated in Table 1 above and Figure 10 below. The working age group experienced the greatest decline (12.2%/-5,985) and made up 60.2% of the total population in 2021 (down from 64.5% in 2011).

The proportion of children in Ceredigion (14.1%) and working age groups (60.2%) are smaller than the national averages (17.6% and 61.1% respectively). Ceredigion had the lowest proportion of children nationally in 2021, followed by Powys (15.5%) and Monmouthshire (15.8%), and the fourth lowest percentage of children under the age of 15 across Wales and England, behind City of London (10.7%), Westminster (12.8%), and Kensington and Chelsea (13.0%).

A population pyramid is used to highlight the age and sex differences of Ceredigion's population and how the composition has changed since 2011. Figure 10 highlights that Ceredigion continues to have a slightly higher proportion of women compared to men and the trend of population ageing is apparent.

Figure 10: Age and Sex Population 2011 and 2021, Ceredigion



Source: ONS, 2011 Census (LC1117EW) and 2021 Census (TS009)

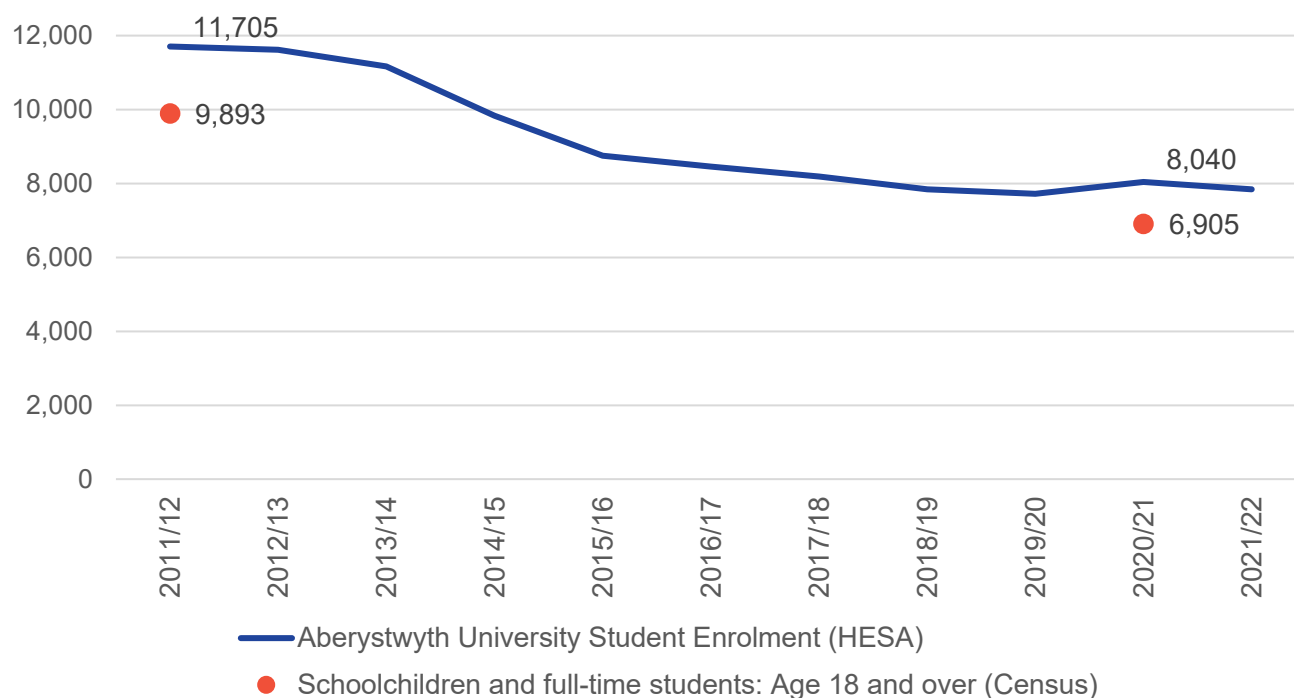
3.4 Student population

Ceredigion's changing population and internal migration profile is influenced significantly by the number of students enrolling at Aberystwyth University, and to a lesser extent, at the Lampeter Campus of the University of Wales Trinity Saint David (UWTSD).

According to the census, Ceredigion's student population has declined since 2011 by approximately 30.2% (a fall of 2,988 full time students over the age of 18), from 9,893 in 2011 to 6,905 in 2021. The extent of this decline should be treated with caution, due to the associated impact of the COVID-19 pandemic. It is likely that the campus closures, remote-learning, temporary residence changes, and confusion/inaccuracies on how students reported their residence during the census, led to undercounting in census data. Other local authorities in England and Wales, with a high proportion of students, also believed that the 2021 Census undercounted their resident population due to the absence of students at the time of enumeration. ¹⁷

Higher Education Statistics Agency (HESA) provides detailed statistics on higher education students and can be used in addition to census data to understand trends in student populations and enrolment. As reflected in Figure 11, the number of students enrolled at Aberystwyth University according to HESA is consistently higher than the total student population in Ceredigion as recorded by the census, however, both datasets align in terms of the downward trend in the student population in Ceredigion.

Figure 11: Comparison of HESA student enrolment at Aberystwyth University and Census Student population (18 years and over), 2011 to 2022.



Source: HESA (2011-2022)¹⁸ and ONS, 2021 Census¹⁹

¹⁷ Manchester City Council (2023). Available at: [Communities and Power \(manchester.gov.uk\)](https://www.manchester.gov.uk/communities-and-power)

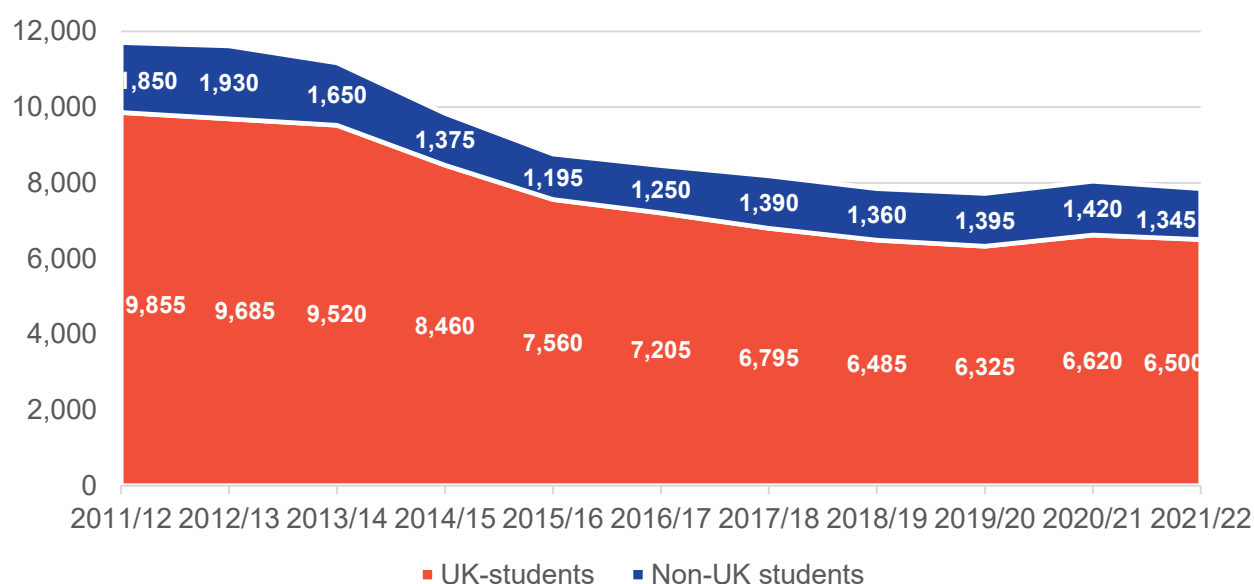
¹⁸ HESA (2024) Where do HE study? Available at: [Where do HE students study? | HESA](https://www.hesa.ac.uk/where-do-he-students-study/)

¹⁹ONS (2023). Usual resident population in full-time education by age 18 to 30. Available at: [Usual resident population in full-time education by age 18 to 30 years, England and Wales: Census 2021 - Office for National Statistics \(ons.gov.uk\)](https://www.ons.gov.uk/peoplepopulationandcommunity/educationandtraining/articles/usualresidentpopulationinfulltimeeducationbyage18to30yearsenglandandwales/census2021)

In 2021, 8,040 full time students were enrolled at Aberystwyth University, according to HESA. According to the Lampeter Campus (Trinity Wales Saint David), there were approximately 180 students enrolled at the University in 2022/23. This suggests that the student enrolment figures are approximately 1,495 higher than what the census recorded in 2021. Both data sources however indicate a significant decrease in the student population over the respective periods. The magnitude of the decrease is similar in both datasets (approximately 30% to 32%), which reinforces the reliability of the downward trend.

The vast majority (approximately 80%) of students enrolled at Aberystwyth University comprise of UK students, however, this group have experienced a greater decline compared to international students. The 31.3% decline in the number of students enrolled at Aberystwyth University was largely driven by a reduction in UK students (-3,235/ 88.3%), and to a lesser extent international students (a fall of 505 students/ 27.3%) between 2011/12 and 2020/21 (Figure 12).

Figure 12: Number of UK and non-UK students enrolled at Aberystwyth University 2011/12 to 2021/22



Source: HESA (2024) ²⁰

There are slight differences in the methodologies employed by each source (Census and HESA), in terms of scope, coverage and timings, which could account for some of the variations between the figures. It is therefore difficult to quantify the extent of which the decline in student population, as recorded by the census, reflects a real long-term trend or is due to the temporary changes to living arrangements due to the COVID-19 pandemic restrictions.

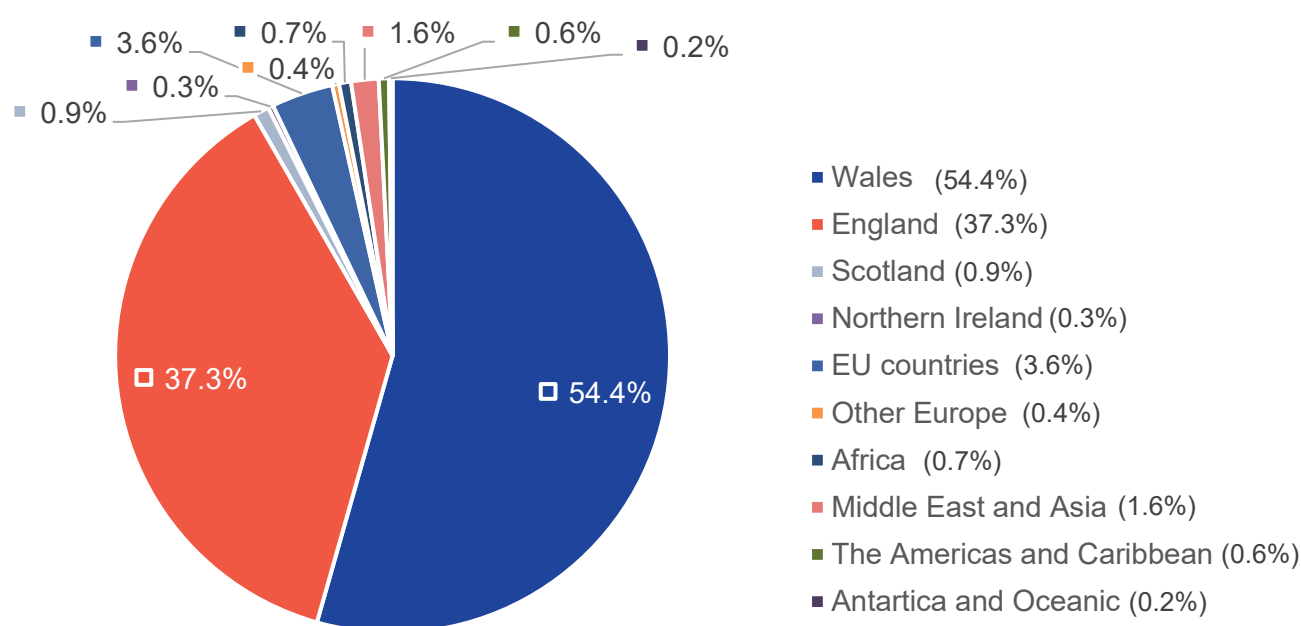
3.5 Country of birth

This section looks at census data on residents by country of birth, which provides important insight on the size of the first-generation migrant populations in the County and how things have changed since 2011. Country of birth is often the preferred measure when looking at long-term changes in migration.

²⁰ HESA (2024) Where do HE study? Available at: [Where do HE students study? | HESA](https://www.hesa.ac.uk/data-and-figures/where-do-he-students-study/)

On Census Day, the majority of the population (54.4%/38,892) were born in Wales. By comparison, 70.9% of the total Welsh population were born in Wales. Over a third of Ceredigion's population (37.3%) were born in England, compared to 21.2% across Wales. The relatively high numbers of English-born residents are likely the result of the large student population and retirees that move to the County. Under one-tenth of the population (7.1%) were born in countries outside of the UK (5,062 residents), which is slightly above the national average (6.9%) and neighbouring local authorities, such as Gwynedd (5.4%), Carmarthenshire (5.1%), Pembrokeshire (4.8%) and Powys (4.8%). Figure 13 below outlines the population of Ceredigion by country of birth as at census day.

Figure 13: Population by country of birth, Ceredigion, 2021

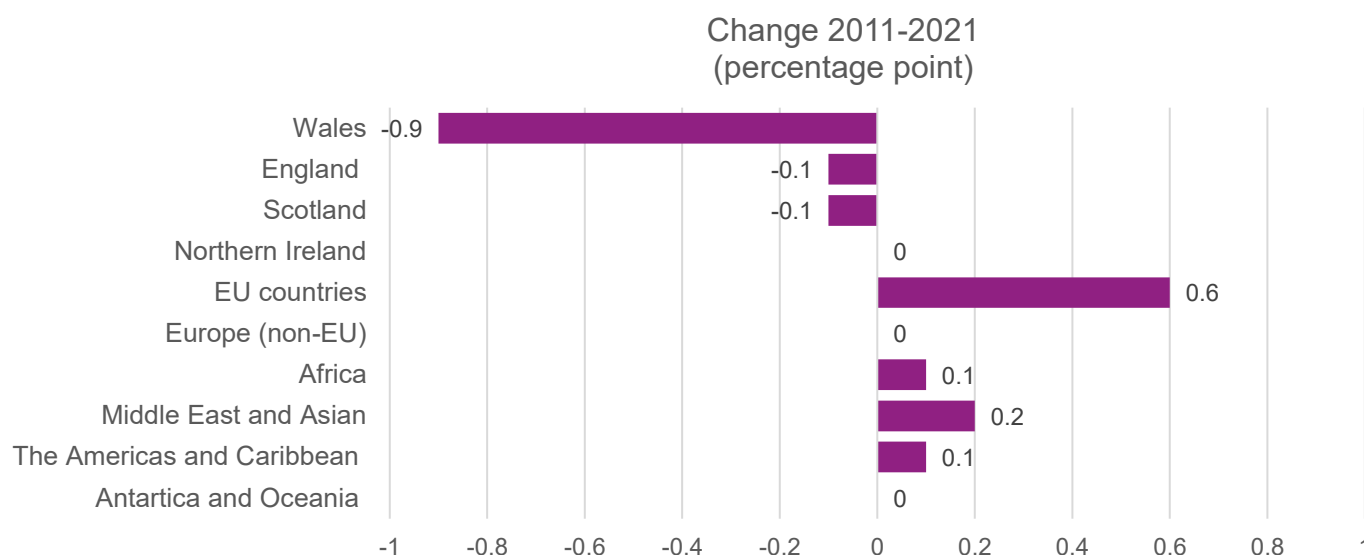


Source: ONS, Census 2021 – Table TS012²¹

Over the last decade, Ceredigion's population has become slightly more diverse (Figure 14). The UK-born population declined marginally from 55.4% in 2011 to 54.4% in 2021, a 1.0 percentage point decline. Whereas the non-UK born population increased by 1.0% percentage points, from 6.1% in 2011 to 7.1% in 2021. Overall, the EU-born population saw the largest percentage point increase, from 3.0% in 2011 to 3.6% in 2021, an increase of 0.6 percentage points. Those born in Poland remain the County's largest migrant group. The number of Ceredigion residents born in Poland rose from just over 700 in 2011 (0.9% of the local population) to just under 950 in 2021 (1.3%), equating to a 0.4 percentage point increase.

²¹ ONS (2022) TS012- County of birth (detailed). Available at: [Nomis - Official Census and Labour Market Statistics - Nomis - Official Census and Labour Market Statistics \(nomisweb.co.uk\)](https://nomisweb.co.uk/nomis/Official%20Census%20and%20Labour%20Market%20Statistics)

Figure 14: Change in size of population by region, Ceredigion, 2011-2021



Source: ONS, *Census Maps – Change since 2011*²²

*Change data for the EU relate to the current set of EU members including Croatia who joined in 2013.

The proportion of people born in Wales saw a modest decline of 0.9 percentage points, from 55.3% (42,005) in 2011 to 54.4% (38,892) in 2021. Whilst the proportion of English-born and Scottish-born residents declined by 0.1 percentage points.

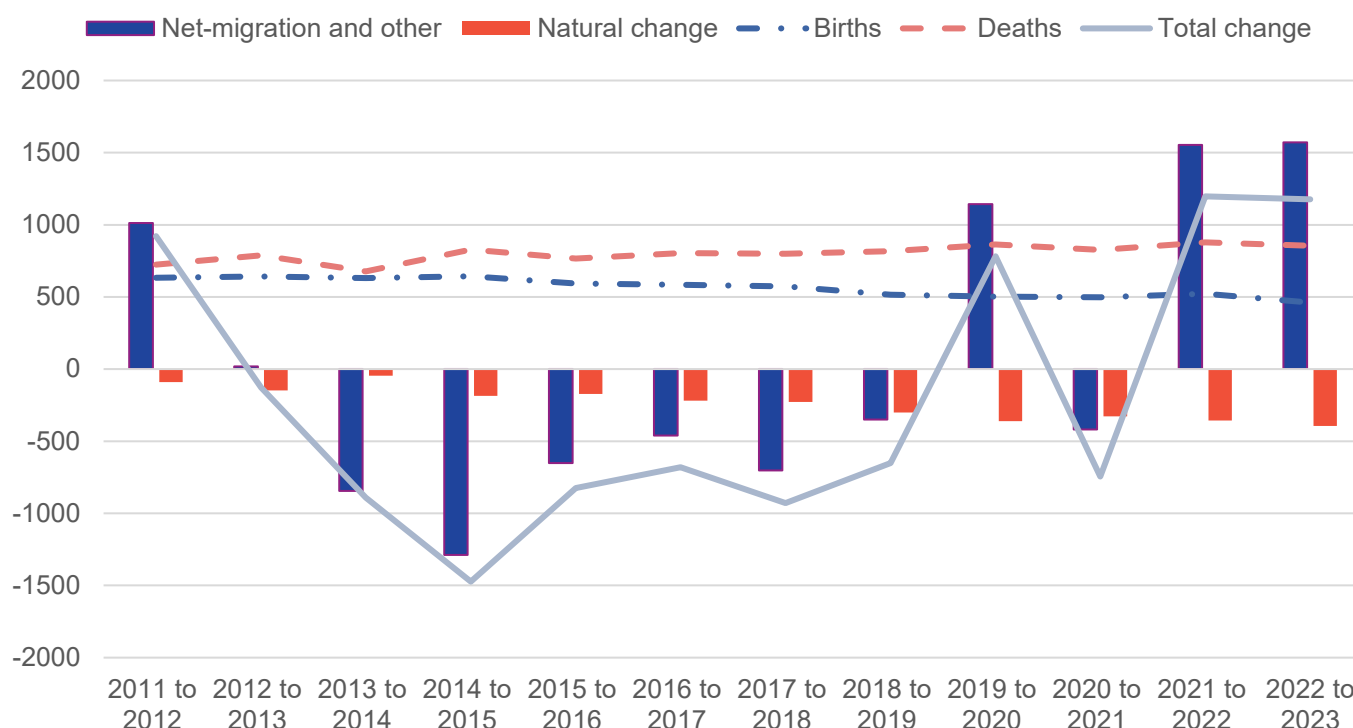
3.6 Components of Change

Examination of the components of population change for Ceredigion reveals the factors that have driven the population decrease since 2011.

As reflected in Figure 15 below, between 2011/12 and 2022/23, the number of deaths has consistently exceeded the number of births, resulting in negative natural change every year. Births ranged from a high of 643 in 2014/15 to a low of 461 in 2022/23, while deaths ranged from a low of 677 in 2013/14 to a high of 878 in 2021/22. On the other hand, net-migration figures fluctuated significantly across the years, with recent years experiencing an unusually high positive net-migration (2021/22 +1,553 and 2022/23 +1,571).

²² ONS (2022). *Census Maps – Ten-year change in Ceredigion, Country of birth*. Available at: [Country of birth - Census Maps, ONS](#)

Figure 15: Drivers of Ceredigion's population growth, mid-2011 to mid-2023



Source: ONS (2024), MYEs - Components of Population Change²³

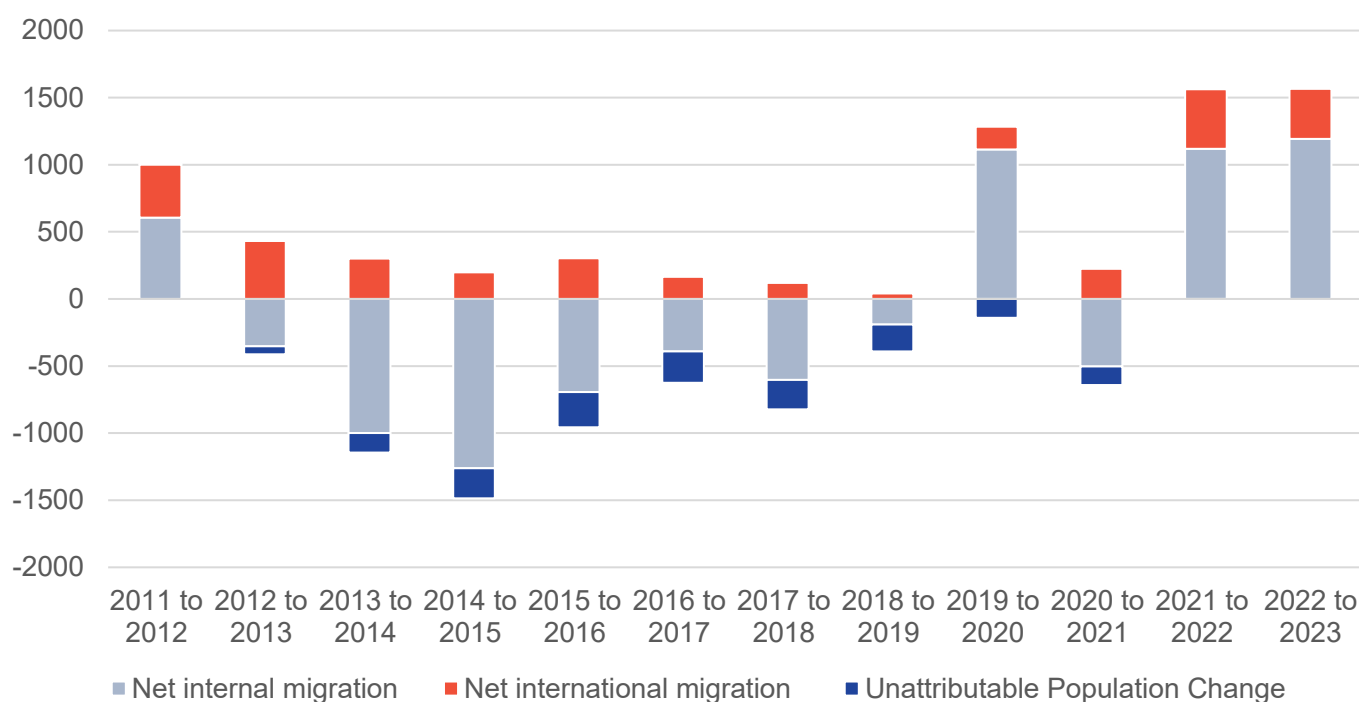
According to the components of population change data, 55% of the population decline (-5.8%) experienced between 2011 and 2021 in Ceredigion was driven by negative net migration (i.e., more people leaving the county than moving in), while the remaining 45% was driven by negative natural change (i.e. deaths exceeding births).

Population growth in Ceredigion between 2011/12 and 2022/23 were predominantly driven by fluctuations in net migration. While natural change consistently exerted downward pressure on the population due to more deaths than births, years with high positive net migration countered this effect, leading to overall population growth in those periods. Whereas, years with negative net migration exacerbated the population decline. This highlights the critical role migration patterns play in shaping the demographic trends of Ceredigion.

To better understand the migration dynamics, Figure 16 below outlines the internal and international migration patterns in Ceredigion between 2011/12 and 2022/23. Internal migration appears to be the most significant driver of population change in Ceredigion, however, it is very volatile, whereas international migration has less of an influence and is more stable. Overall, there have been more years with periods of net negative compared to net positive internal migration, whereas international migration has remained consistently positive between 2011/12 to 2022/23.

²³ Stats Wales (2023). Components of population change, by local authority. Available at: [Components of population change, by local authority and component \(gov.wales\)](https://gov.wales/components-of-population-change-by-local-authority)

Figure 16: Internal and International migration patterns, Ceredigion (2011/12 to 2022/23)



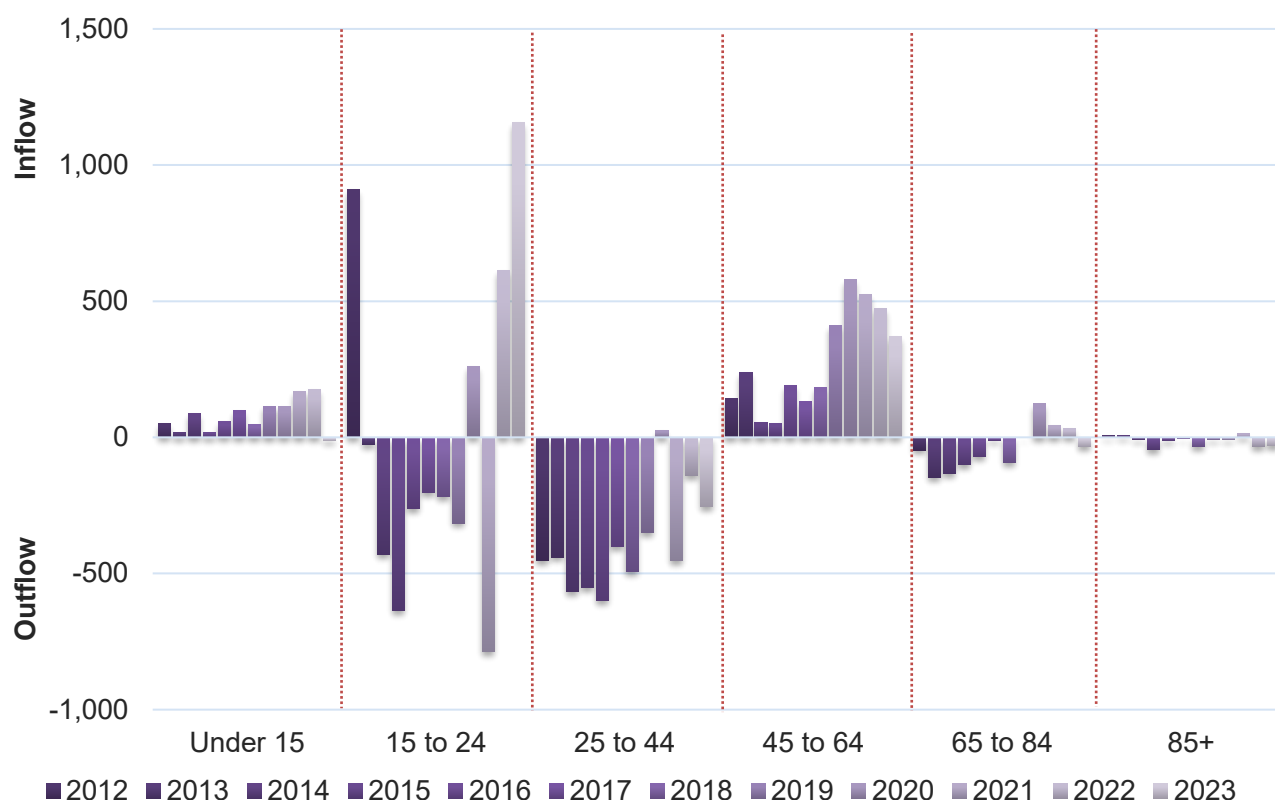
Source: ONS (2024), MYEs - Components of Population Change²⁴

As outlined in Figure 17 overleaf, internal migration patterns in Ceredigion vary by age. The greatest movement of residents in and out of Ceredigion is within the 15 to 24 age group, and this is attributed to the high proportion of students within the County who move to study at the universities, and the outward migration of younger populations to other parts of the UK for education and employment purposes.

In general, there tends to be a positive net migration of the 0 to 15 and 45 to 64 age groups and a negative net migration of residents aged 25 to 44 and 65 and over. Migration of residents aged 15 to 24 has fluctuated over the years, which is expected due to the highly mobile student population and influence of the universities.

²⁴ Stats Wales (2023). Components of population change, by local authority. Available at: [Components of population change, by local authority and component \(gov.wales\)](https://gov.wales/components-of-population-change-by-local-authority-and-component)

Figure 17: Net internal migration by age groups, Ceredigion, 2012 to 2023



Source: ONS (2024)²⁵

As reflected in Figure 17 above, the recent population increase in Ceredigion is driven by the influx of 15- to 24-year-olds to Ceredigion in 2022 and 2023. When broken down into smaller age groups, there is a greater positive net migration of 15- to 19-year-olds and lower negative net migration of 20- to 24-year-olds, compared to previous years. It is difficult to determine exactly what has caused this recent change, however some possible explanations include:

- The return to pre-pandemic student populations as in-person learning resumed and travel restrictions eased, resulting in students moving back into the County to study.
- Less students/residents of student age leaving Ceredigion once graduating from university/school.
- Correction of the 2021 Census undercount (i.e. students who were not counted at their term-time address during the time of enumeration are now included within Ceredigion's usual resident population)
- Families with children/ teenagers moving to Ceredigion.

3.7 Population Projections

Population projections provide estimates of the size of the future population, based on assumptions about births, deaths, and migration, which are based on previous trends. The Welsh Government produce a set of local authority projections every two years.²⁶ The following section will look at the

²⁵ ONS (2024). Internal migration in England and Wales. Available at: [Internal migration in England and Wales - Office for National Statistics \(ons.gov.uk\)](https://ons.gov.uk/internal-migration-in-england-and-wales)

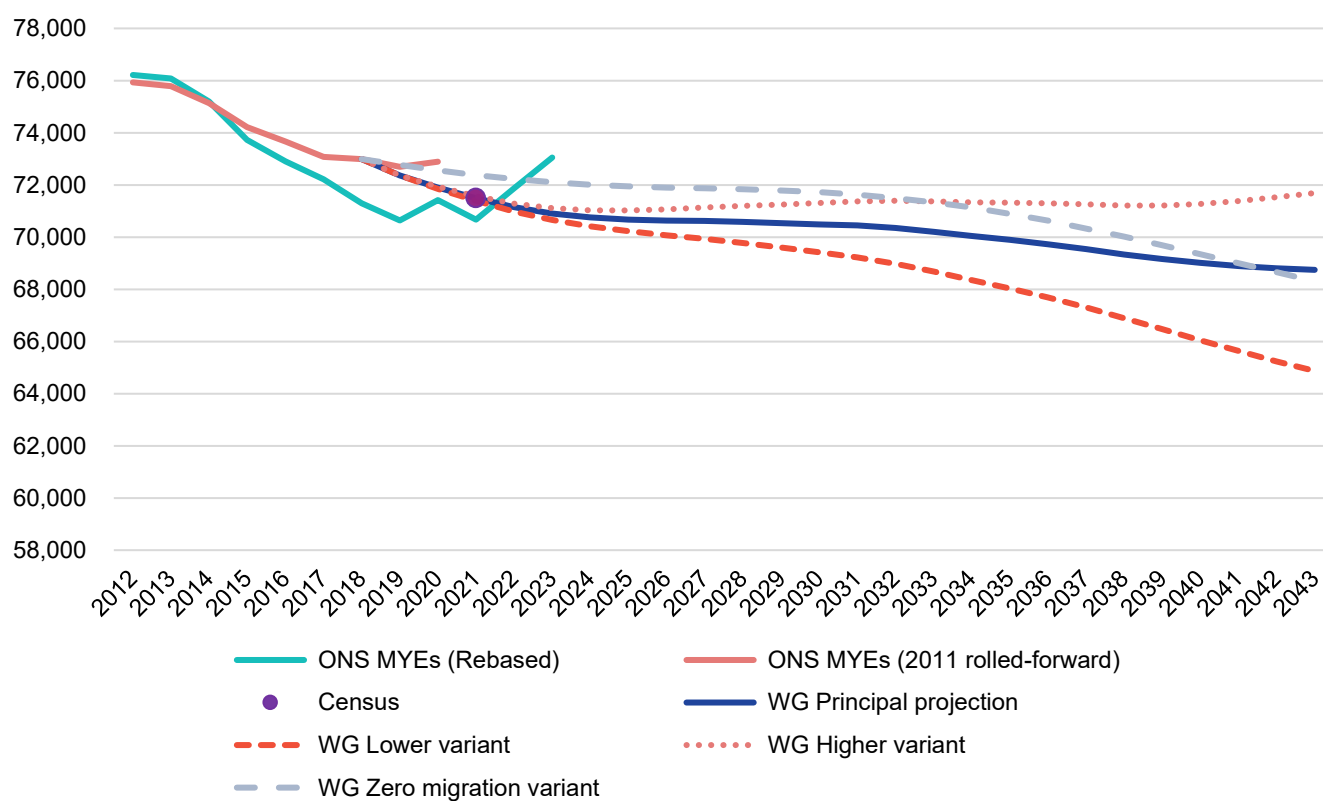
²⁶ Although standard practice is to produce population projections every two years, it was decided from user feedback and engagement

official Welsh Government projections to gain a better understanding of how the demographics of the County may change in the future.

It is important to highlight that these projections are trend-based not forecasts, nor do they attempt to predict the impact of future government policies, changing economic circumstances, or other factors such as the COVID-19 pandemic. Therefore, the projections do not consider any need arising from the Council's corporate direction, which is to boost the local economy, nor does it consider any emerging need from on-going investments into the area, such as Growing Mid Wales, the Levelling Up Fund, or the Shared Prosperity Fund.

According to the latest population projections (2018-based), the trend of population decline is expected to continue (refer to Figure 18 below). The principal projection²⁷, expects a reduction of 5.8% (4,247 residents) over the 25-year period (2018 to 2043). The different scenarios in Figure 18 clearly show the impact that alternative migration, fertility, and mortality assumptions can have on the future projections. Variant projections provide an indication of the inherent uncertainty of demographic behaviour, especially for long-term projections.

Figure 18: Welsh Government 2018-based population projections and ONS MYEs for Ceredigion (2012 to 2043)



Source: Welsh Government (2020)²⁸ and ONS, Mid-Year-Estimates (2012 to 2023)²⁹

that the 2020-based local authority projections would not be produced. One of the reasons being the need to wait to gain a better understanding of pandemic related impacts - [National and subnational population projections – user feedback – Office for National Statistics](#)

²⁷ The 'principal' projection is the main projection, and is based on assumptions about fertility, mortality and migration considered to best reflect demographic patterns at that time. It can be considered the 'central' projection.

²⁸ Stats Wales (2020). Population projections by local authority and year. Available at: [Population projections by local authority and year \(gov.wales\)](#)

²⁹ Stats Wales (2023). Population estimates by local authority and year. Available at: [Population estimates by local authority and year \(gov.wales\)](#)

Whilst it is recognised that the 2018-based are the most recent projections available at the time of writing, they were produced five years ago and can be considered outdated. The next round of local authority population projections is expected during the first half of 2025 and will be 2022-based. Although recent trends (between 2021-2022) were positive, it is unlikely that this will have countered the negative trends prior to 2021. It is therefore expected that the 2022-based projections will estimate a slightly lower decline than the 2018-based downward trajectory. Given the concerns regarding depopulation in recent years, this is certainly a more positive scenario than the current projections. However, if the positive trends continue (as seen during 2021 to 2023 – refer to MYEs in section 3.2 Population Change), it is hoped that future projections (such as, the 2024-based), could reverse the trend of population decline entirely.

4.0 Conclusion

Population estimates and projections are vital for effective governance and local planning. They play a key role in the Council's planning (e.g., educational services, childcare provision, health care services, housing etc.), development of policy, resource allocation, and funding allocations from Welsh Government. Furthermore, the data is used as a basis for many other statistics which influence decision making. Therefore, ensuring that the population and projections of the population are of the highest quality is vital. Unfortunately, there are many uncertainties around Ceredigion's current and future population estimates. Ceredigion is home to a high proportion of highly mobile students, who are difficult to capture in data. Furthermore, the unique circumstances of the 2021 Census occurring during the COVID-19 pandemic, have led to concerns around a potential undercount in the overall population in 2021. That being said, it is clear from various sources that the demographic dynamics of Ceredigion have undergone notable changes since the previous census in 2011.

Ceredigion's population experienced a significant decline over the decade, which has been primarily driven by negative net migration (i.e., more people leaving than moving into the County) and to a slightly lesser extent, negative natural change (deaths exceeding the number of births) across the period. Natural change in Ceredigion has continuously been negative, with deaths outnumbering births. The ageing population contributed to this trend, leading to a higher mortality rate and fewer births. While there has been some inward migration, particularly from the younger age groups attracted to the universities, it has not been sufficient to offset the out-migration of young adults over this period. A declining and ageing population will continue to have an impact on the Council and its services. Less funding will be allocated, which is particularly challenging for rural Counties with an ageing demographic, as public services are generally more expensive to provide in rural areas, and an ageing population increases demand for services, such as housing and care.

Positively however, the last two years saw a notable increase in net migration (particularly internal migration), which has led to a significant population increase (+2,374/3.4%) between mid-2021 and mid-2023. Although, the population remains lower than it was in 2011, this is a positive trend given the concerns regarding depopulation in recent years. Several possible reasons are put forward for the increase; a return to pre-pandemic student numbers, less young people leaving the County, and/or a correction of the potential 2021 Census student population undercount, are to name a few. However, it is difficult to determine exactly what is happening at this stage and whether these trends will continue longer-term.

Looking ahead, the latest Welsh Government projections (2018-based), suggest that the population will continue to decline over the next 20 years. However, it is important to note that although these projections are the most recent available, they are outdated and do not consider the recent increase in population. The new 2022-based projections will be published in 2025, and it is likely that these will estimate a less substantial decrease. If the recent positive trends continue (as seen during 2021 to 2023), it is possible that future projections (such as the 2024-based), could reverse the trend of population decline entirely.

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Appendix 1: Population Change by Lower Super Output Area

Small-area population estimates from the 2011 and 2021 Census provide an overview of how Ceredigion's population decline since 2011 has been distributed across its Lower Super Output Area (LSOAs) geographies (Appendix 1)³⁰. *For a full overview of Census data at LSOA level, please refer to the [2021 Census Area Profiles](#).*

Of the 45 LSOAs, an overwhelming majority (38 LSOAs/84.4%) saw a population decline between 2011 and 2021. Table 1 below provides the 2011 and 2021 population figures and population change (2011 to 2021).

The LSOA with the greatest decline in its resident population over the decade is Llanbadarn Fawr North with 832 less residents in 2021 than in 2011, this is a decline of 36.4%. Whilst the LSOA with the greatest population increase between 2011 and 2021 is Beulah (located in the South of the County), an increase of 136 residents since 2011 (+8.4%). The LSOAs representing the greatest decline are largely concentrated around Aberystwyth (e.g., Llanbadarn Fawr North, Aberystwyth Bronglais, Aberystwyth Central) and Lampeter (e.g., Lampeter 1), a key driver of this decline is due to the reduction in the number of students enrolling at Aberystwyth University and the Lampeter Campus (University of Wales Trinity Saint Davids) since 2011 (refer to Section XX for further detail). *It is important to note that three LSOAs have experienced boundary changes since the 2011 Census and therefore comparisons over the decade cannot be made, these are listed at the bottom of the table. Refer to Appendix 2 for further detail of changes.*

Table 1: Population change in Ceredigion LSOAs, 2011 to 2021.

LSOA names	LSOA codes	2011	2021	Change	%
Ceulanamaesmawr	W01000523	1,910	1,863	- 47	-2.5%
Tirymynach	W01000548	1,901	1,769	- 132	-6.9%
Trefeurig	W01000549	1,771	1,774	3	0.2%
Borth	W01001937	2,078	1,955	- 123	-5.9%
Aberystwyth Bronglais	W01000512	2,075	1,355	- 720	-34.7%
Aberystwyth Canol/Central	W01000513	2,471	2,109	- 362	-14.6%
Aberystwyth Rheidol 1	W01000517	1,472	1,172	- 300	-20.4%
Aberystwyth Penparcau 1	W01000515	1,446	1,320	- 126	-8.7%
Aberystwyth Penparcau 2	W01000516	1,676	1,643	- 33	-2.0%
Aberystwyth Rheidol 2	W01000518	1,259	1,007	- 252	-20.0%
Llanbadarn Fawr South	W01000552	1,095	1,036	- 59	-5.4%
Llanbadarn Fawr North	W01001935	2,285	1,453	- 832	-36.4%
Aberaeron	W01000506	1,422	1,268	- 154	-10.8%
Ciliau Aeron	W01000524	1,974	1,920	- 54	-2.7%
Llanrhystyd	W01000538	1,562	1,544	- 18	-1.2%
Llansantffraed 1	W01000539	1,222	1,187	- 35	-2.9%

³⁰ Lower Super Output Areas: are made up of groups of Output Areas (OAs), usually four or five. They comprise of between 400 and 1,200 households and usually have a resident population between 1,000 and 3,000. There are 45 LSOAs in Ceredigion.

Llansantffraed 2	W01000540	1,164	1,155	- 9	-0.8%
Penbryn	W01000545	2,045	1,981	- 64	-3.1%
Lampeter 1	W01000527	1,510	1,152	- 358	-23.7%
Lampeter 2	W01000528	1,460	1,353	- 107	-7.3%
Llanfihangel Ystrad	W01000535	2,037	2,036	- 1	0.0%
Llangybi	W01000537	1,484	1,390	- 94	-6.3%
Llanwenog	W01000541	1,854	1,742	-112	-6.0%
Aberporth 1	W01000507	1,196	1,140	- 56	-4.7%
Aberporth 2	W01000508	1,178	1,043	- 135	-11.5%
Aberteifi/Cardigan - Mwdan	W01000509	1,784	1,862	78	4.4%
Aberteifi/Cardigan - Rhyd-y-Fuwch	W01000510	1,226	1,182	- 44	-3.6%
Aberteifi/Cardigan - Teifi	W01000511	1,174	1,174	-	0.0%
Pen-parc 1	W01000546	1,128	1,136	8	0.7%
Pen-parc 2	W01000547	1,180	1,137	- 43	-3.6%
Beulah	W01000519	1,627	1,763	136	8.4%
Capel Dewi	W01000522	1,293	1,199	- 94	-7.3%
Llandyfriog	W01000531	1,835	1,764	- 71	-3.9%
Llandysul Town	W01000533	1,439	1,340	- 99	-6.9%
Troedyraur	W01000551	1,310	1,380	70	5.3%
Faenor 1	W01000525	1,206	1,226	20	1.7%
Llanfarian	W01000534	1,541	1,518	- 23	-1.5%
Melindwr	W01000543	2,020	2,011	- 9	-0.4%
Ystwyth	W01000552	2,074	2,008	- 66	-3.2%
Llangeitho	W01000536	1,459	1,365	- 94	-6.4%
Lledrod	W01000542	2,209	2,204	- 5	-0.2%
Tregaron	W01000550	1,213	1,154	- 59	-4.9%
Penglais 1	W01002001	N/A	2,923	N/A	N/A
Penglais 2	W01002000	N/A	1,414	N/A	N/A
New Quay, Llanarth & Llandysilio	W01002002	N/A	4,349	N/A	N/A

*Welsh Government are currently working with local authorities to undertake a review of the LSOA names. Therefore, please note that the names provided here are subject to change.

* N/A: data not available and not comparable due to LSOA boundary changes. Please refer to Appendix 2 for full disclaimer.

Appendix 2: Lower Super Output Area – boundary change

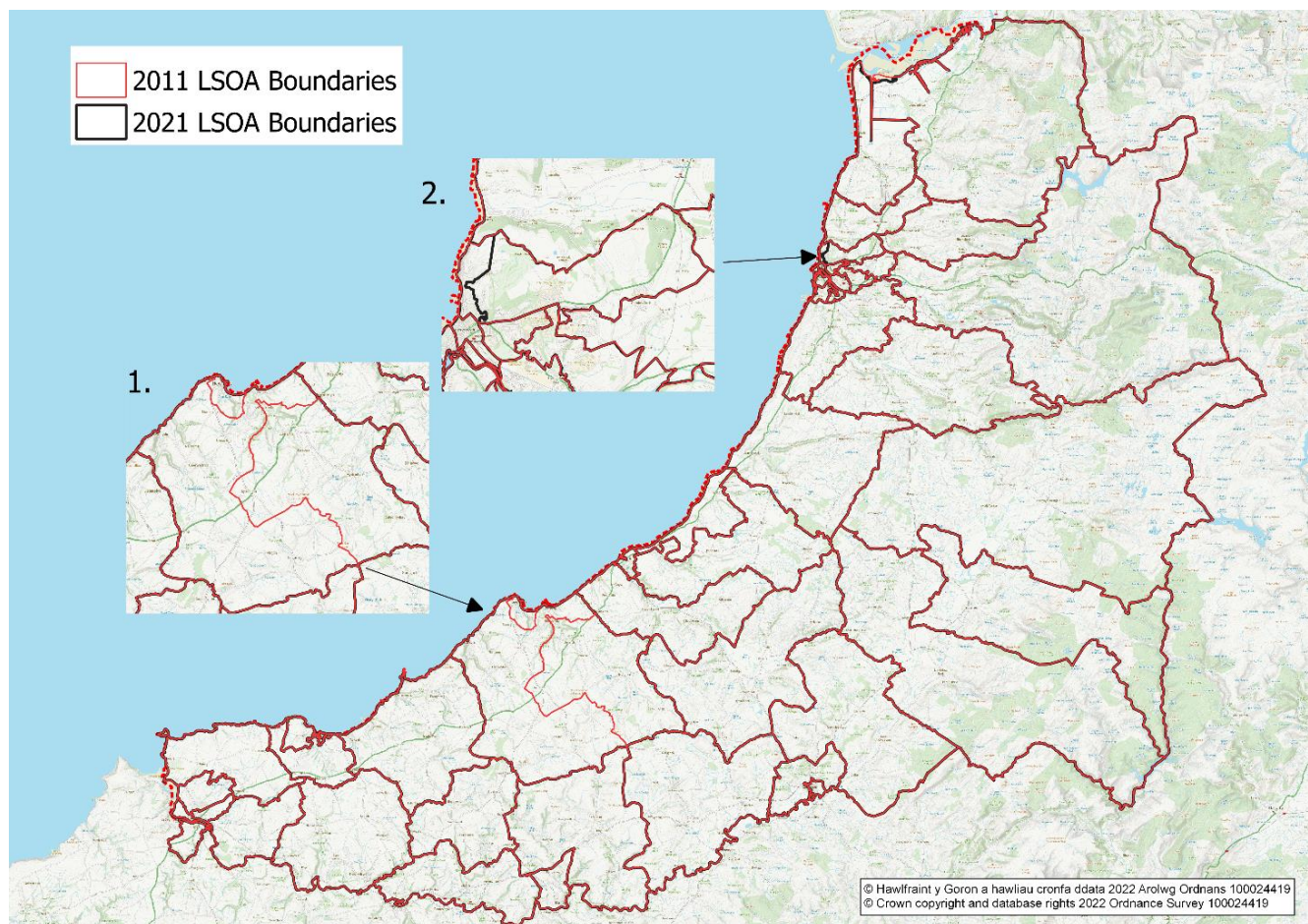
It should be noted that since the last Census in 2011, ONS issued certain changes to boundaries. This has resulted in Ceredigion having a new set of LSOA boundaries in 2021. Although only a few of the boundaries have changed, comparisons of data between 2011 and 2021 will not be possible where these changes have occurred.

In 2011 there were 47 LSOAs in Ceredigion, whereas the new LSOA boundaries in 2021 include 45 LSOAs.

There have been changes to 4 of the 2011 LSOAs in total. New Quay (W01000544), Llanarth (W01000529) and Llandysiliogogo (W01000532) have been combined into 1 LSOA. Aberystwyth Penglais (W01001934) has been split into 2 LSOAs. Welsh Government are working with local authorities to re-name the LSOAs. Currently, there are no official names for the new LSOAs, therefore, in the interim, Ceredigion County Council's Research Team are using the following names:

- New Quay, Llanarth & Llandysilio (W01002002)
- Penglais 1 (W01002001)
- Penglais 2 (W01002000)

The map below shows the LSOA boundary changes between 2011 and 2021.



Source: Ceredigion County Council, 2023