

***Distribution Sub-Group (2025) Paper 07 –
Impact of mid-2024 population estimates on the settlement***

This discussion paper has been written by officials of the Welsh Government. Ministers have not had an opportunity to comment on the contents. Exemplifications of changes are provided simply to inform discussion by DSG members. They are not Welsh Government proposals or statements of Government policy for or against changes.

Impact of mid-2024 population estimates on the settlement

Summary

1. This paper presents an analysis of the latest mid-year population estimates, published by the Office for National Statistics in July 2025, and illustrates their impact on the 2025–26 financial settlement.

Views sought

2. DSG members are asked to consider, in principle, whether to update to the latest mid-2024 population estimates in the 2026-27 Settlement, noting that another exemplification using the 2022-based sub-national population projections for Wales may be presented at a later date (if the data becomes available in time for inclusion in the 2026-27 Settlement).

Related papers

3. Distribution Sub-Group (2024) Paper 13 – Population data options for the 2025-26 Settlement
4. Distribution Sub-Group (2023) Paper 18 – Population data decision for the 2024-25 Settlement
5. Distribution Sub-Group (2023) Paper 18 – Population data decision for the 2024-25 Settlement
6. Distribution Sub-Group (2023) Paper 05 – Population data for the 2024-25 Settlement
7. Distribution Sub-Group (2022) Paper 08 – Population data Census 2021 for the 2023-24 Settlement
8. Distribution Sub-Group (2022) Paper 05 - Population data for the 2023-24 Settlement.

Background

9. The mid-year population estimates reflect the number of people living in Wales as of 30 June each reference year and are published annually.
10. [Mid-2024 population estimates](#) were published by ONS on the 30th July.
11. According to the mid-2024 estimates, Wales has a population of 3,186,58 - an increase of 22,177 compared to the mid-2023 figures used in the 2025-26 settlement. This paper reflects the impact of this increase of 22,177 (0.7% increase) in population figures.
12. The 2022-based sub-national population projections are produced by Welsh Government and should be available later this year.
13. The mid-year admin-based population estimates (ABPEs) have yet to become official estimates of the population. As in previous years, the ONS has released ABPEs alongside

Distribution Sub-Group (2025) Paper 07 – Impact of mid-2024 population estimates on the settlement

the accredited official mid-year population estimates. For mid-2024, the admin-based population estimate for Wales was around 3,177,600. This is **0.3% lower than the official mid-year population estimates**. ABPEs use innovative new methods and a wider range of data sources. Differences between the methods and the data sources used mean that the ONS does not expect both sets of estimates to match exactly.

14. The ONS is aiming for the ABPEs to become the official estimates of the population in 2026.

Initial Analysis

15. The following section will investigate the financial implications of **mid-2024 population estimates** on the 2025-26 settlement.

Comparison across population datasets

16. Annex A includes **Table 1** and **Table 2**, which present the mid-year population estimates for 2023 and 2024, respectively. **Table 3** highlights the relative change in population between the two years.
17. The largest positive relative changes in population have been in Newport, Swansea, and Wrexham; whilst the largest negative relative changes in population have been in Cardiff, Flintshire, Ceredigion, and Caerphilly.

Re-distribution of Aggregated External Finance (AEF)

18. **Table 4** in **Annex B** exemplifies the redistributive financial impact on the 2025-26 settlement resulting from the use of the mid-2024 population estimates.
19. Based on the **mid-2024 population data**, Newport, Swansea, and Wrexham experience the largest monetary increases in the 2025-26 settlement of £2,514k (0.76%), £1,933k (0.41%) and £884K (0.35%) respectively. Conversely, the largest monetary decreases are observed in Cardiff, Ceredigion, and Caerphilly with reductions of £1,657k (0.25%), £841k (0.58%) and £795k (0.21%) respectively.
20. The exemplification is based on the isolated effect of the mid-year population estimates on the 2025-26 settlement. The exemplifications do not account for any other changes in data that will be made for the 2026-27 Settlement, for example: the impact of transfers in and out, for the impact of changes in formulae resulting from IBA reviews or any other structural changes to the overall formula. It was also assumed that the monetary increases for some local authorities as part of the floor funding calculations were unchanged.

Recommendation

21. For the 2025-26 settlement DSG agreed to use the mid-2023 population estimates. The group are asked to agree to the use of the mid-2024 population estimates in the calculation of the 2026-27 settlement (with the option to revisit should the 2022-based sub-national projections become available in time for the 2026-27 Settlement).

Local Government Finance Policy and Sustainability Welsh Government

***Distribution Sub-Group (2025) Paper 07 –
Impact of mid-2024 population estimates on the settlement***

Annex A

Table 1: 2025-26 Settlement population data mid-year 2023 population estimates

	Mid-year 2023 Population Estimates													
	Total	Aged 3	Aged 3 to 11	Aged 3 to 16	Aged 11 to 15	Aged 11 to 20	Aged 16 and over	Aged 16 to 18	Aged 0 to 17	Aged 18 to 64	Aged 18 and over	Aged under 60	Aged 60 and over	Aged 85 and over
Isle of Anglesey	69,291	601	6,644	10,639	4,106	7,362	57,688	2,154	13,071	37,430	56,220	45,124	24,167	2,410
Gwynedd	119,173	1,049	10,743	17,344	6,631	14,179	100,124	3,952	21,683	69,565	97,490	82,814	36,359	3,811
Conwy	114,410	993	10,147	16,488	6,372	11,509	96,367	3,580	20,473	61,952	93,937	73,307	41,103	4,412
Denbighshire	97,156	988	9,522	15,480	5,923	10,913	80,182	3,428	19,279	53,555	77,877	65,605	31,551	3,137
Flintshire	155,812	1,526	15,142	24,692	9,489	17,413	128,665	5,419	30,817	90,949	124,995	111,009	44,803	4,062
Wrexham	136,149	1,412	13,901	22,300	8,488	15,653	111,605	4,797	27,766	80,103	108,383	99,122	37,027	3,467
Powys	134,439	1,138	11,655	18,871	7,157	13,314	113,870	4,277	23,424	72,687	111,015	85,073	49,366	4,905
Ceredigion	73,050	569	5,756	9,235	3,518	9,693	62,982	2,276	11,432	42,670	61,618	48,571	24,479	2,349
Pembrokeshire	125,006	1,133	11,708	18,948	7,318	13,528	104,360	4,185	23,485	68,177	101,521	81,788	43,218	4,190
Carmarthenshire	190,083	1,761	18,239	29,562	11,331	21,110	157,809	6,535	36,684	106,228	153,399	128,796	61,287	5,812
Swansea	246,742	2,388	23,642	37,786	14,346	30,716	205,171	8,192	46,947	149,557	199,795	181,641	65,101	6,880
Neath Port Talbot	142,898	1,340	14,011	22,511	8,586	18,214	118,241	5,203	27,992	84,058	114,906	102,227	40,671	3,718
Bridgend	146,743	1,400	14,460	23,224	8,821	16,292	121,111	4,966	28,941	86,507	117,802	105,439	41,304	3,930
The Vale of Glamorgan	134,733	1,366	14,180	22,781	8,711	15,527	109,914	4,706	27,983	76,647	106,750	95,567	39,166	3,794
Rhondda Cynon Taff	241,178	2,486	24,560	39,272	14,832	28,370	197,810	8,372	48,901	144,240	192,277	177,880	63,298	5,593
Merthyr Tydfil	58,593	649	6,423	10,012	3,654	6,738	47,487	1,956	12,456	34,784	46,137	43,339	15,254	1,265
Caerphilly	176,437	1,807	18,206	29,105	10,956	20,268	144,485	6,062	36,060	104,032	140,377	128,561	47,876	3,996
Blaenau Gwent	67,356	730	6,626	10,506	3,912	7,195	55,479	2,149	13,324	40,160	54,032	48,815	18,541	1,519
Torfaen	93,419	1,027	9,688	15,435	5,808	10,732	76,232	3,334	19,428	54,354	73,991	67,487	25,932	2,452
Monmouthshire	94,572	828	8,304	13,683	5,297	9,492	79,637	3,048	17,039	52,654	77,533	62,558	32,014	3,431
Newport	163,628	2,011	18,921	29,413	10,642	19,126	130,364	5,678	37,036	98,959	126,592	126,373	37,255	3,529
Cardiff	383,536	3,909	38,193	60,258	22,449	56,463	316,306	13,646	75,747	252,932	307,789	309,925	73,611	7,395
Wales	3,164,404	31,111	310,671	497,545	188,347	373,807	2,615,889	107,915	619,968	1,862,200	2,544,436	2,271,021	893,383	86,057

***Distribution Sub-Group (2025) Paper 07 –
Impact of mid-2024 population estimates on the settlement***

Table 2: 2025-26 Settlement population data mid-year 2024 population estimates

Mid-year 2024 Population Estimates														
	Total	Aged 3 to Aged 3	Aged 3 to 11	Aged 3 to 16	Aged 11 to 15	Aged 11 to 20	Aged 16 and over	Aged 16 to 18	Aged 0 to 17	Aged 18 to 64	Aged 18 and over	Aged under 60	Aged 60 and over	Aged 85 and over
Isle of Anglesey	69,097	595	6,423	10,553	4,174	7,408	57,709	2,236	12,927	37,221	56,170	44,624	24,473	2,455
Gwynedd	120,813	1,026	10,534	17,218	6,697	14,648	101,819	4,093	21,618	70,968	99,195	83,867	36,946	3,840
Conwy	114,891	974	9,937	16,353	6,407	11,707	97,038	3,645	20,348	61,992	94,543	73,024	41,867	4,428
Denbighshire	98,202	954	9,615	15,647	5,930	11,006	81,174	3,478	19,403	54,156	78,799	66,057	32,145	3,162
Flintshire	155,867	1,555	14,981	24,557	9,409	17,657	129,034	5,648	30,746	90,669	125,121	110,348	45,519	4,151
Wrexham	138,245	1,335	13,860	22,487	8,651	16,235	113,592	4,936	28,008	81,507	110,237	100,471	37,774	3,576
Powys	135,059	1,112	11,611	18,824	7,109	13,359	114,718	4,301	23,306	72,782	111,753	84,912	50,147	5,039
Ceredigion	72,599	538	5,644	9,168	3,530	9,610	62,546	2,232	11,396	42,044	61,203	47,791	24,808	2,331
Pembrokeshire	125,761	1,081	11,464	18,844	7,290	13,636	105,310	4,255	23,329	68,476	102,432	81,779	43,982	4,279
Carmarthenshire	190,800	1,708	17,919	29,300	11,244	21,254	158,946	6,696	36,437	106,472	154,363	128,500	62,300	5,927
Swansea	251,304	2,284	23,858	38,474	14,397	31,508	209,302	8,724	47,839	152,498	203,465	185,101	66,203	6,948
Neath Port Talbot	143,249	1,302	13,637	22,304	8,520	18,155	118,819	5,206	27,823	84,190	115,426	101,930	41,319	3,784
Bridgend	147,530	1,420	14,245	23,104	8,845	16,431	122,161	4,972	28,785	86,998	118,745	105,525	42,005	4,055
The Vale of Glamorgan	135,743	1,346	13,978	22,797	8,660	15,729	111,152	5,022	28,172	76,717	107,571	95,544	40,199	3,943
Rhondda Cynon Taff	242,844	2,338	24,256	39,141	14,872	28,456	199,852	8,425	48,698	145,584	194,146	178,698	64,146	5,657
Merthyr Tydfil	58,972	636	6,379	10,052	3,657	6,826	47,880	2,091	12,551	34,859	46,421	43,361	15,611	1,321
Caerphilly	176,865	1,652	17,856	28,854	10,928	20,620	145,375	6,331	35,817	104,394	141,048	128,328	48,537	4,070
Blaenau Gwent	67,873	667	6,692	10,674	3,981	7,382	55,946	2,242	13,446	40,367	54,427	49,056	18,817	1,557
Torfaen	94,119	943	9,591	15,445	5,860	10,969	76,919	3,344	19,409	54,782	74,710	67,797	26,322	2,527
Monmouthshire	94,930	857	8,275	13,677	5,289	9,642	80,089	3,185	17,083	52,624	77,847	62,179	32,751	3,483
Newport	167,899	2,012	19,419	30,239	10,785	19,921	133,921	6,037	38,126	101,525	129,773	129,888	38,011	3,589
Cardiff	383,919	3,755	37,872	60,398	22,509	55,723	316,918	13,845	75,752	252,233	308,167	309,073	74,846	7,471
Wales	3,186,581	30,090	308,046	498,110	188,744	377,882	2,640,220	110,944	621,019	1,873,058	2,565,562	2,277,853	908,728	87,593

***Distribution Sub-Group (2025) Paper 07 –
Impact of mid-2024 population estimates on the settlement***

Table 3: Change in relative share of population: mid-year 2024 estimates vs mid-year 2023 estimates

	Relative Change percentage points (pp) in mid-2024 population estimates vs mid-2023 population estimates													
	Total	Aged 3	Aged 3 to 11	Aged 3 to 16	Aged 11 to 15	Aged 11 to 20	Aged 16 and over	Aged 16 to 18	Aged 0 to 17	Aged 18 to 64	Aged 18 and over	Aged under 60	Aged 60 and over	Aged 85 and over
Isle of Anglesey	-0.02	0.05	-0.05	-0.02	0.03	-0.01	-0.02	0.02	-0.03	-0.02	-0.02	-0.03	-0.01	0.00
Gwynedd	0.03	0.04	-0.04	-0.03	0.03	0.08	0.03	0.03	-0.02	0.05	0.03	0.04	0.00	-0.04
Conwy	-0.01	0.05	-0.04	-0.03	0.01	0.02	-0.01	-0.03	-0.03	-0.02	-0.01	-0.02	0.01	-0.07
Denbighshire	0.01	-0.01	0.06	0.03	0.00	-0.01	0.01	-0.04	0.01	0.02	0.01	0.01	0.01	-0.04
Flintshire	-0.03	0.26	-0.01	-0.03	-0.05	0.01	-0.03	0.07	-0.02	-0.04	-0.04	-0.04	-0.01	0.02
Wrexham	0.04	-0.10	0.02	0.03	0.08	0.11	0.04	0.00	0.03	0.05	0.04	0.05	0.01	0.05
Powys	-0.01	0.04	0.02	-0.01	-0.03	-0.03	-0.01	-0.09	-0.03	-0.02	-0.01	-0.02	-0.01	0.05
Ceredigion	-0.03	-0.04	-0.02	-0.02	0.00	-0.05	-0.04	-0.10	-0.01	-0.05	-0.04	-0.04	-0.01	-0.07
Pembrokeshire	0.00	-0.05	-0.05	-0.03	-0.02	-0.01	0.00	-0.04	-0.03	-0.01	0.00	-0.01	0.00	0.02
Carmarthenshire	-0.02	0.02	-0.05	-0.06	-0.06	-0.02	-0.01	-0.02	-0.05	-0.02	-0.01	-0.03	0.00	0.01
Swansea	0.09	-0.09	0.13	0.13	0.01	0.12	0.08	0.27	0.13	0.11	0.08	0.13	0.00	-0.06
Neath Port Talbot	-0.02	0.02	-0.08	-0.05	-0.04	-0.07	-0.02	-0.13	-0.03	-0.02	-0.02	-0.03	-0.01	0.00
Bridgend	-0.01	0.22	-0.03	-0.03	0.00	-0.01	0.00	-0.12	-0.03	0.00	0.00	-0.01	0.00	0.06
The Vale of Glamorgan	0.00	0.08	-0.03	0.00	-0.04	0.01	0.01	0.17	0.02	-0.02	0.00	-0.01	0.04	0.09
Rhondda Cynon Taf	0.00	-0.22	-0.03	-0.04	0.00	-0.06	0.01	-0.16	-0.05	0.03	0.01	0.01	-0.03	-0.04
Merthyr Tydfil	0.00	0.03	0.00	0.01	0.00	0.00	0.00	0.07	0.01	-0.01	0.00	0.00	0.01	0.04
Caerphilly	-0.03	-0.32	-0.06	-0.06	-0.03	0.03	-0.02	0.09	-0.05	-0.01	-0.02	-0.03	-0.02	0.00
Blaenau Gwent	0.00	-0.13	0.04	0.03	0.03	0.03	0.00	0.03	0.02	0.00	0.00	0.00	0.00	0.01
Torfaen	0.00	-0.17	0.00	0.00	0.02	0.03	0.00	-0.08	-0.01	0.01	0.00	0.00	-0.01	0.04
Monmouthshire	-0.01	0.19	0.01	0.00	-0.01	0.01	-0.01	0.05	0.00	-0.02	-0.01	-0.02	0.02	-0.01
Newport	0.10	0.22	0.21	0.16	0.06	0.16	0.09	0.18	0.17	0.11	0.08	0.14	0.01	0.00
Cardiff	-0.07	-0.09	0.00	0.01	0.01	-0.36	-0.09	-0.17	-0.02	-0.12	-0.08	-0.08	0.00	-0.06
Wales														

***Distribution Sub-Group (2025) Paper 07 –
Impact of mid-2024 population estimates on the settlement***

Annex B

Table 4: Exemplifications on the 2025-26 settlement (AEF)

£'000

Unitary Authority	2025-26 settlement (using mid-2023 population estimates)	2025-26 settlement (using mid-2024 population estimates)	Difference Value	Difference %
Angelsey	135,881	135,485	-397	-0.29%
Gwynedd	248,390	248,805	415	0.17%
Conwy	219,010	218,579	-431	-0.20%
Denbighshire	215,251	215,495	244	0.11%
Flintshire	275,984	275,489	-496	-0.18%
Wrexham	249,508	250,392	884	0.35%
Powys	251,461	251,313	-148	-0.06%
Ceredigion	144,225	143,384	-841	-0.58%
Pembrokeshire	233,534	233,332	-202	-0.09%
Carmarthenshire	375,692	375,159	-533	-0.14%
Swansea	468,409	470,341	1,933	0.41%
Neath Port Talbot	306,177	305,640	-537	-0.18%
Bridgend	276,528	276,616	88	0.03%
Vale of Glamorgan	224,448	224,587	140	0.06%
RCT	521,329	521,092	-237	-0.05%
Merthyr	133,144	133,213	69	0.05%
Caerphilly	373,900	373,105	-795	-0.21%
Blaenau Gwent	154,534	154,615	81	0.05%
Torfaen	192,216	192,213	-3	0.00%
Monmouthshire	135,248	135,158	-91	-0.07%
Newport	329,322	331,836	2,514	0.76%
Cardiff	674,886	673,229	-1,657	-0.25%
Total Unitary Authorities	6,139,078	6,139,078		