

North Worcestershire

2012-based Subnational Population Projection

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For the attention of:

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Acknowledgements

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1. Introduction

Context

- 1.1 In March 2014, Edge Analytics produced a suite of demographic scenarios for the North Worcestershire Councils (Bromsgrove, Redditch and Wyre Forest). These scenarios, developed using POPGROUP technology¹, used the most recent demographic statistics from the Office for National Statistics (ONS) and the Department for Communities and Local Government (DCLG). Seven 'core' scenarios and four sensitivity scenarios were produced.
- 1.2 In May 2014, 2012-based subnational population projections (SNPP) were released by ONS. Bromsgrove District Council and Redditch Borough Council have requested that the original suite of scenarios delivered by Edge Analytics be updated to include the newly-released 2012-based SNPP.

Approach & Methodology

- 1.3 This short note presents the 2012-based SNPP alongside the seven original 'core' scenarios for Bromsgrove, Redditch, Wyre Forest and North Worcestershire in aggregate.
- 1.4 For detail on the data inputs and assumptions used in the seven original scenarios, and the POPGROUP methodology, please refer to the Edge Analytics March 2014 report (which is appended to the Amion April 2014 report entitled 'North Worcestershire Housing Need'²).
- 1.5 The 2012-based SNPP scenario presented here (referred to as the 'SNPP-2012') replicates the official projection from ONS. Counts of births, deaths, population and migration (internal and international) are defined in each year of the forecast period (2012–2030). To assess the household/dwelling and jobs growth implications of the SNPP-2012, the same assumptions are applied here as were applied to the seven core scenarios in the March 2014 Edge Analytics report.

¹ <http://www.ccsr.ac.uk/popgroup/>

² http://www.bromsgrove.gov.uk/cms/PDF/North_Worcestershire_Housing_Need.pdf

2. Scenario Results

- 2.1 Eight scenario alternatives are presented for each of the North Worcestershire districts and North Worcestershire in aggregate:

Scenario Type		Scenario Name
Core Scenarios	'Official' projections	SNPP-2010 SNPP-2012
	Alternative trend scenarios	Migration-led 5yr Migration-led 10yr Natural Change
	Jobs-led scenarios	Jobs-led (Cambridge Econometrics) Jobs-led (Oxford Economics) Jobs-led (Experian)

- 2.2 For detail on the assumptions underpinning these scenarios (excluding the SNPP-2012), please refer to the March 2014 Edge Analytics report.
- 2.3 A summary of the results for each core scenario is provided in the form of a chart and an accompanying table of statistics. The chart illustrates the trajectory of population change resulting from each scenario. The table summarises the change in population and household numbers from 2012–2030 that results from each scenario.
- 2.4 The scenarios are ranked (high to low) according to the expected population growth throughout the projection period (2012–2030). The tables also show the estimated level of household change throughout the projection period, the average annual net migration associated with the population change, the average annual dwelling requirement and the expected average annual jobs growth.
- 2.5 For all three districts, the 'SNPP-2012' scenario results in lower population growth than the 'SNPP-2010' scenario.
- 2.6 For Bromsgrove (Figure 2 and Table 2), the 'SNPP-2012' scenario suggests population growth of 9.4% to 2030, equivalent to 254 dwellings per year. This is a relatively low growth outcome

compared to the other scenarios, with only the 'Migration-led 5yr' and 'Natural Change' scenarios recording lower dwelling growth over the forecast period.

- 2.7 For Redditch (Figure 3 and Table 3), the 'SNPP-2012' scenario suggests population growth of just 4.6% to 2030, equivalent to 161 dwellings per year. This is the lowest of all scenario outcomes and results from a higher and consistent net out-migration in the SNPP-2012.
- 2.8 For Wyre Forest (Figure 4 and Table 4), the 'SNPP-2012' scenario suggests population growth of 3% to 2030, equivalent to 191 dwellings per year. This is higher than the 'Migration-led 10yr' and 'Migration-led 5yr' growth outcomes but below all the job-led scenarios and the 'SNPP-2010' scenario.

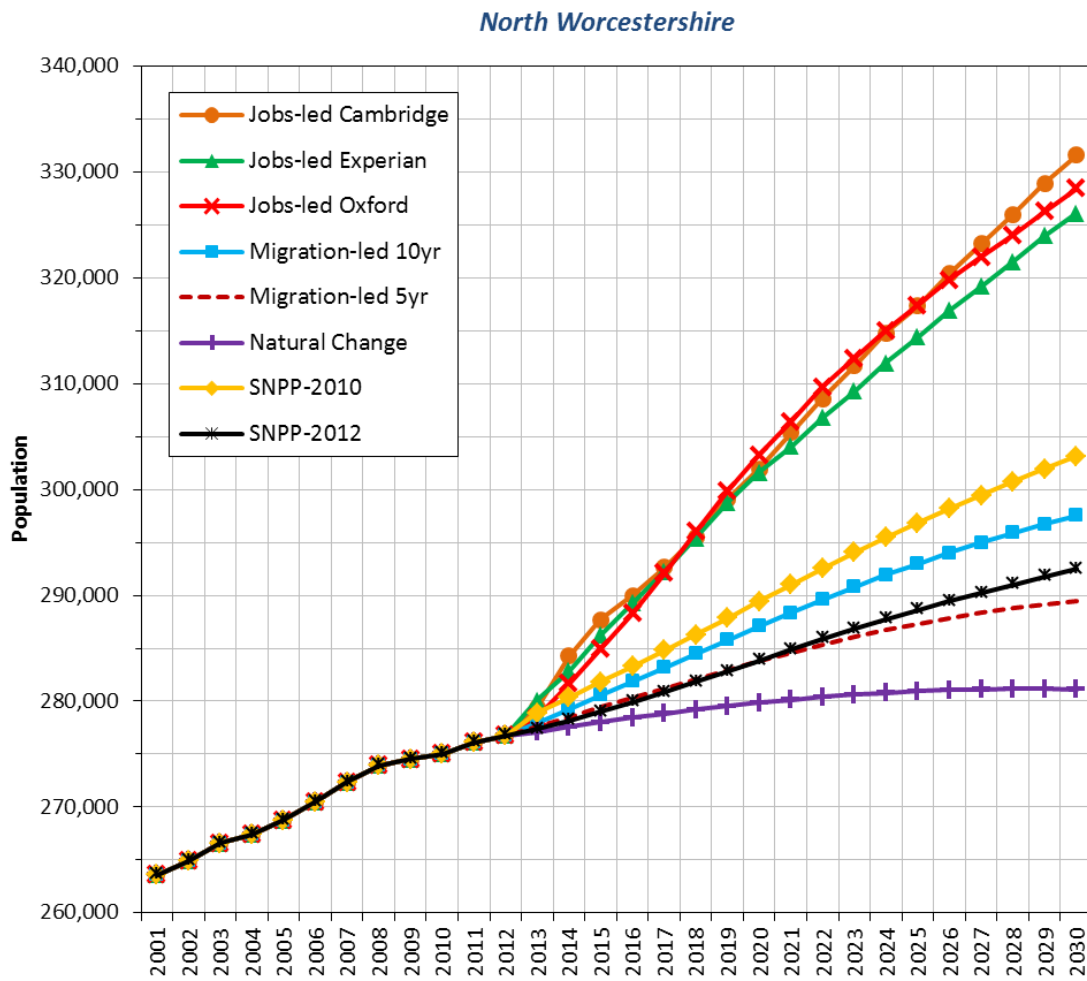


Figure 1: North Worcestershire scenario forecasts population growth 2012-2030

Table 1: North Worcestershire forecast summary 2012-2030 (ranked in order of population change)

Scenario	Change 2012 - 2030				Average per year		
	Population Change	Population Change %	Households Change	Households Change %	Net Migration	Dwellings	Jobs
Jobs-led Cambridge	54,849	19.8%	24,974	21.4%	2,642	1,429	483
Jobs-led Oxford	51,671	18.7%	23,584	20.2%	2,477	1,350	400
Jobs-led Experian	49,353	17.8%	22,841	19.6%	2,369	1,308	344
SNPP-2010	25,705	9.3%	14,540	12.4%	1,319	832	-75
Migration-led 10yr	20,782	7.5%	12,140	10.4%	973	694	-281
SNPP-2012	15,713	5.7%	10,610	9.1%	758	607	-386
Migration-led 5yr	12,710	4.6%	8,856	7.6%	564	505	-487
Natural Change	4,354	1.6%	4,736	4.1%	0	270	-556

Bromsgrove

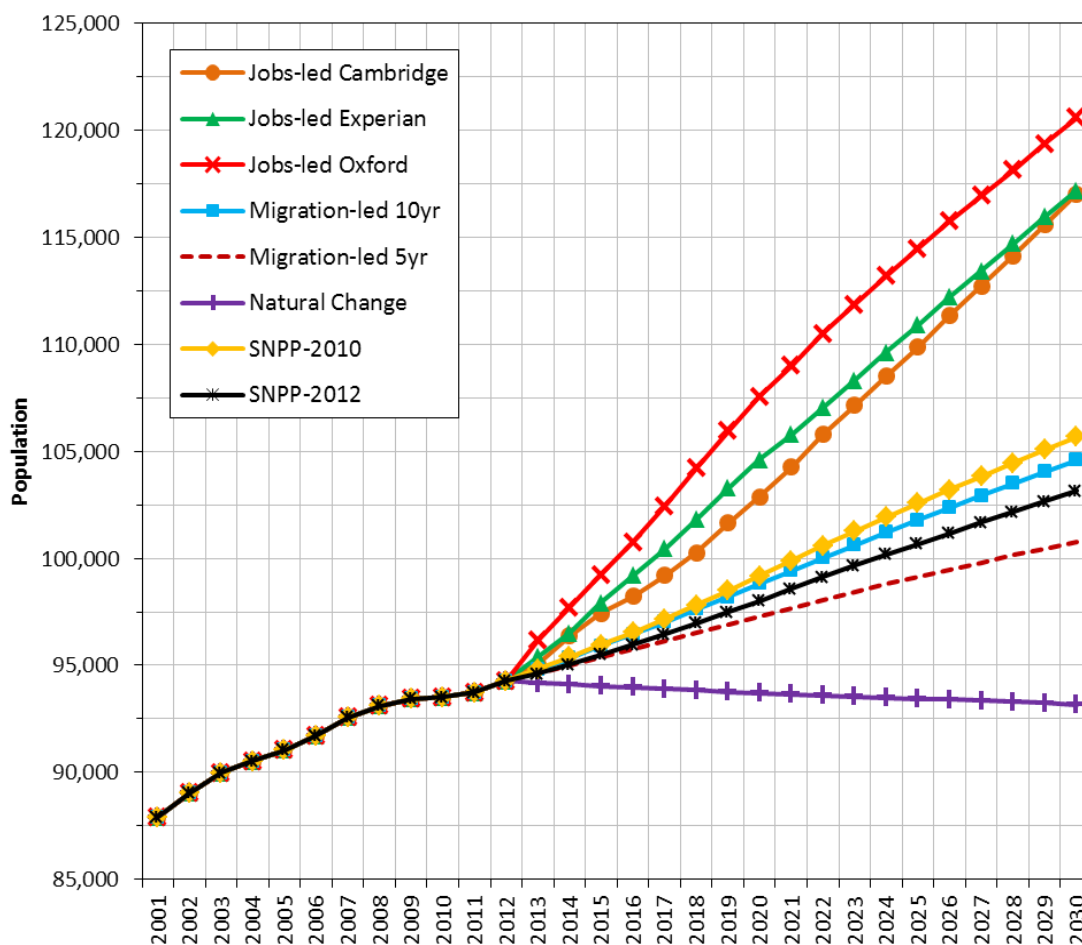


Figure 2: Bromsgrove scenario forecasts population growth 2012-2030

Table 2: Bromsgrove forecast summary 2012-2030 (ranked in order of population change)

Scenario	Change 2012 - 2030				Average per year		
	Population Change	Population Change %	Households Change	Households Change %	Net Migration	Dwellings	Jobs
Jobs-led Oxford	26,294	27.9%	10,527	27.3%	1,543	602	294
Jobs-led Experian	22,900	24.3%	9,324	24.2%	1,385	533	217
Jobs-led Cambridge	22,733	24.1%	9,264	24.0%	1,387	530	215
SNPP-2010	11,406	12.1%	5,348	13.8%	857	306	36
Migration-led 10yr	10,302	10.9%	4,893	12.7%	759	280	-67
SNPP-2012	8,853	9.4%	4,452	11.5%	681	254	-55
Migration-led 5yr	6,490	6.9%	3,442	8.9%	564	197	-167
Natural Change	-1,125	-1.2%	215	0.6%	0	12	-243

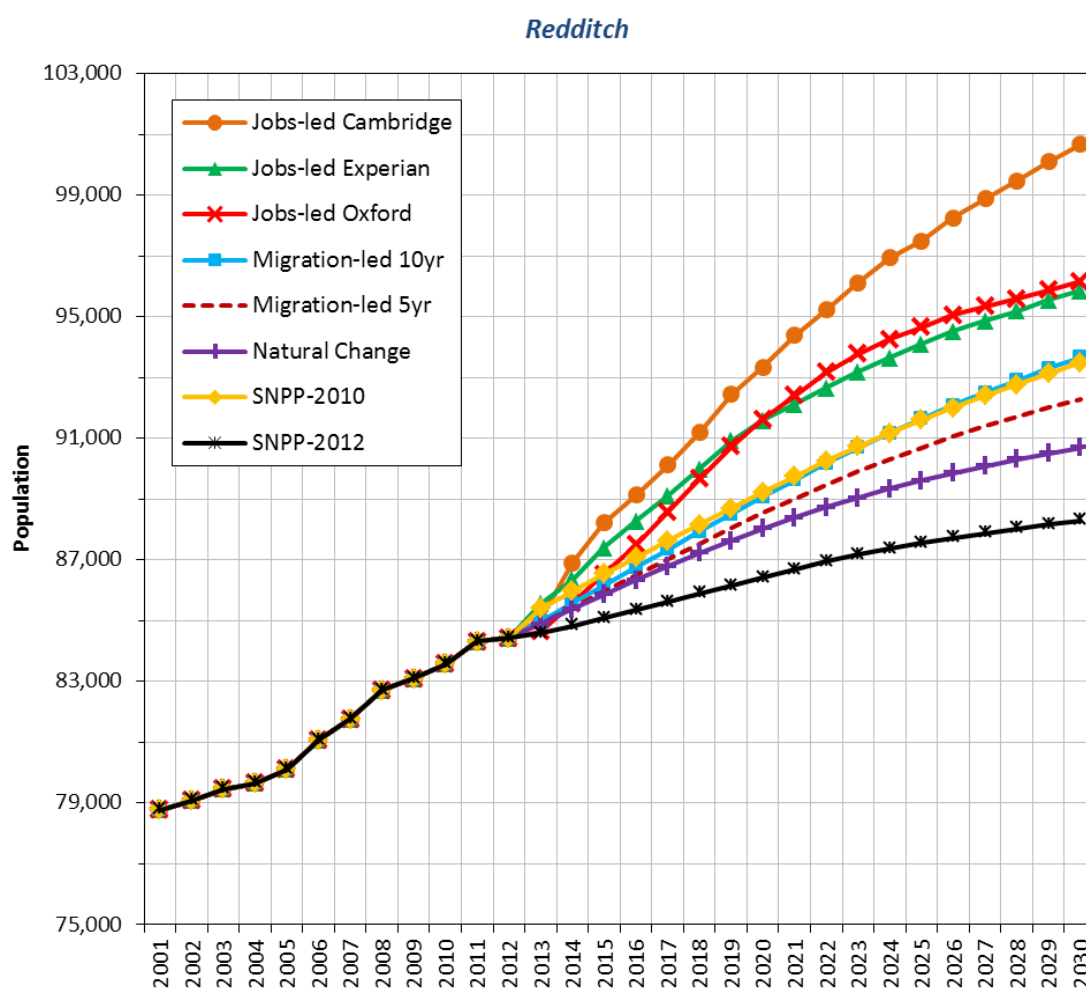


Figure 3: Redditch scenario forecasts population growth 2012-2030

Table 3: Redditch forecast summary 2012-2030 (ranked in order of population change)

Scenario	Change 2012 - 2030				Average per year		
	Population Change	Population Change %	Households Change	Households Change %	Net Migration	Dwellings	Jobs
Jobs-led Cambridge	16,259	19.3%	7,468	21.4%	405	425	182
Jobs-led Oxford	11,734	13.9%	5,729	16.4%	188	326	65
Jobs-led Experian	11,425	13.5%	5,616	16.1%	172	319	58
Migration-led 10yr	9,250	11.0%	4,821	13.8%	76	274	19
SNPP-2010	8,638	10.2%	4,695	13.3%	76	267	14
Migration-led 5yr	7,855	9.3%	4,248	12.2%	14	242	-30
Natural Change	6,271	7.4%	3,697	10.6%	0	210	-79
SNPP-2012	3,869	4.6%	2,840	8.2%	-157	161	-134

Wyre Forest

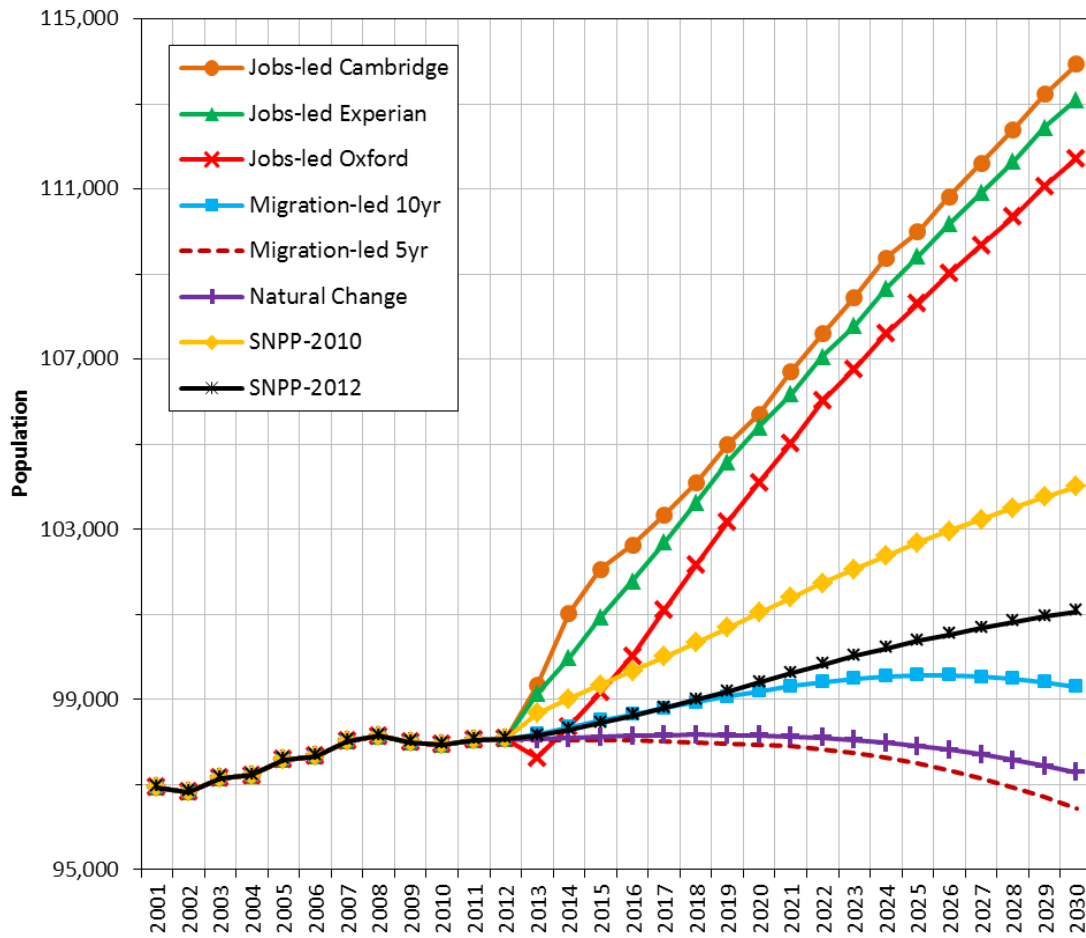


Figure 4: Wyre Forest scenario forecasts population growth 2012-2030

Table 4: Wyre Forest forecast summary 2012-2030 (ranked in order of population change)

Scenario	Change 2012 - 2030				Average per year		
	Population Change	Population Change %	Households Change	Households Change %	Net Migration	Dwellings	Jobs
Jobs-led Cambridge	15,857	16.2%	8,241	19.1%	850	475	86
Jobs-led Experian	15,028	15.3%	7,902	18.3%	811	455	69
Jobs-led Oxford	13,643	13.9%	7,328	17.0%	747	422	40
SNPP-2010	5,660	5.8%	4,497	10.4%	385	259	-125
SNPP-2012	2,990	3.0%	3,318	7.7%	235	191	-197
Migration-led 10yr	1,231	1.3%	2,425	5.6%	138	140	-233
Natural Change	-792	-0.8%	824	1.9%	0	48	-233
Migration-led 5yr	-1,634	-1.7%	1,166	2.7%	-14	67	-291