

ESSENTIAL REFERENCE PAPER 'B'

Greater Essex

Demographic Forecasts

Phase 4

January 2013

edge analytics

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EPOA project development phases

1.6 EPOA's demographic requirements are to be delivered through a programme of work, completed in December 2012. With four Phases of work in total, this report constitutes a summary of Phase 4 development. The content of the four Phases is as follows:

1.7 Phase 1: Demographic model configuration & validation (September/October 2011)

The first phase of work used POPGROUP technology to replicate the 2008-based sub-national population projections (SNPP) from the Office for National Statistics (ONS) plus the accompanying household projections from Communities and Local Government (CLG). This initial validation of the POPGROUP technology demonstrated consistency and equivalence of output to the SNPP and to ONS mid-year estimates and Council Tax data on dwelling stock change since 2001. This phase was a key aspect of the project, providing the EPOA authorities with confidence that public discussion of the forecast scenarios could focus on the policy implications of the scenarios rather than technical demographic issues.

1.8 Phase 2: Scenario analysis & report (October 2011 – January 2012)

Following the configuration and validation work in phase 1, a suite of scenarios was produced to enable an evaluation of alternative growth trajectories. These scenarios included: an SNPP 2008-base benchmark; an alternative migration-led trend scenario and a zero-net migration scenarios; dwelling-led scenarios; plus a jobs-led forecast using the East of England Forecasting Model (Autumn 2010)

Scenarios were developed for each of the 24 local authority areas, using a 2033 horizon for each forecast. Results for individual areas were aggregated to produce output for the 11 macro areas. These scenarios provided an updated evidence base to both

support the preparation of Local Plans and to contribute to other planning activities within each local area.

1.9 Phase 3: Demographic model update, scenario analysis & report (May-June 2012)

Phase 3 delivered an updated suite of forecast scenarios following review of the availability and continuing relevance of demographic and other data sources used to produce the material presented in previous phases. As a result of this review the forecast scenarios produced in Phase 3 incorporated two important new releases of demographic intelligence:

- A. indicative 2010 ONS mid-year population estimates
- B. 2010-based ONS sub-national population projections

1.10 Phase 4: Demographic model update, scenario analysis & report (July 2012)

This final phase of the EPOA project reviews the latest demographic evidence, published since completion of the phase 3 report. This includes the initial dissemination of population statistics from the 2011 Census, 2011 mid-year estimates that have resulted from these new census data, plus the 'interim' 2011-based sub-national population projection published by ONS following the release of the new estimates.

The phase 4 analysis examines the population adjustments that have resulted from the latest 2011 evidence, when compared to the mid-year estimates that have been rolled-forward since the 2001 Census. In addition, it scrutinises the methodology and outcomes of the 2011-based projections, which have been assigned an 'interim' status in recognition of the fact that they have not incorporated any revised historic data, which is not due for publication until Spring 2013.

The phase 4 analysis does not provide an update to the scenario forecasts presented in phase 3. This update will follow ONS' release of its revision of mid-year estimates for 2002-2010; due at the end of March 2013.

Previous phases of the EPOA study have acknowledged the importance of Greater

London as a major contributor to demographic change within the EPOA study area, specifically as a source of migrant inflows from the London Boroughs. The phase 4 analysis includes an illustration of the migration links that exist between Greater London and the EPOA local authorities and provides a summary of the alternative growth forecasts produced by the Greater London Authority (GLA), a dwelling-constrained alternative which contrasts to the trend projections published by ONS.