

CARDIFF CITY COUNCIL DEMOGRAPHIC REPORT: REVIEW OF RESPONSES

June 2026

EDGE
ANALYTICS

ACKNOWLEDGEMENT

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Introduction

- 1.1 In May 2026 Cardiff Council published the Updated Demographic Report, prepared by Edge Analytics, as part of the Examination process for the Council's replacement Local Development Plan (LDP).
- 1.2 The Housing Numbers Hearing Session (9th June 2026) will address the question of whether the LDP's target of 26,400 dwellings is supported by robust evidence and sufficient to meet the housing needs of the city up to 2036.
- 1.3 The Council's position, supported by Edge Analytics' conclusions, is that 1,600 dwellings per year remains a reasonable housing target based on the latest available demographic data.
- 1.4 There have been a number of responses to the pre-hearing questions. This concise note, prepared jointly by Edge Analytics and Understanding Data, addresses the responses that relate to the following questions:
- **Is the target of 26,400 units justified?**
 - **Does the target need to be changed in light of the 2022-based local authority household projections for Wales?**

Summary of Responses

- 1.5 A summary of the respondents' comments on the questions listed above is provided in the Appendix to this note.
- 1.6 There are a number of themes within the responses. Some respondents anchor their case in the broadly higher 2022-based Welsh Government projections (Lightwood, TW, Persimmon, HBF), and/or emphasise the historic shortfall from the adopted LDP (Evans, Persimmon, TW).
- 1.7 Lichfield (on behalf of Barratt Redrow) questions Edge Analytics' methodology directly around the issue of Unattributable Population Change (UPC) and its treatment, namely the application of what they refer to as a downward "policy on adjustment" to international migration, while making no equivalent upward adjustment for suppressed household formation (concealed households, overcrowding). Lichfields also flags that Edge cannot fully attribute UPC to international migration because the detailed demographic report underpinning the 2022-based projections had not been published at the time.
- 1.8 In the following paragraphs, comment is provided on the following topics: **UPC, international migration**, and **household formation** rates.

UPC

- 1.9 UPC is population change that has not been assigned by ONS to any one of the components of change (natural change, net internal migration, net international migration) during the mid-year estimate (MYE) rebasing process. Within its 2022-based population projections, it is assumed from a review of the projection data that Welsh Government has not accounted for UPC when calibrating its future growth assumptions (although the methodology document has yet to be released).
- 1.10 UPC in Cardiff between 2011 and 2021 was *negative*. Areas with large negative UPC are typically larger cities with significant student populations.¹ The MYE rebasing exercise resulted in a downwards adjustment to the trajectory of population in Cardiff growth between 2011 and 2021. The negative UPC seen in the Cardiff MYEs is not anomalous. Edge Analytics' caution about using the pre-census (unadjusted) MYEs as a basis for projections is entirely reasonable.
- 1.11 Edge Analytics routinely includes the UPC adjustment in the historical intercensal international migration estimates, as this is the component of change that is the most challenging to estimate. **Neglecting to account for UPC within projections risks misrepresenting the historical profile of growth.**
- 1.12 This approach is supported by that taken by the Greater London Authority (GLA) in its projections. The GLA treats UPC as likely representing international in-migration that was simply not captured in administrative data and reallocates it back into migration assumptions. In its blog post on the 2022-based subnational population projections produced by ONS for local authorities in England, the GLA states:
- “Any UPC in the past estimates on which the projections [2022-based ONS] are based is effectively ignored and has no bearing on the projected population. In cases where there is a substantial amount of UPC in the backseries, this tends to result in rates of projected future population change that are inconsistent with those seen in the period of past estimates on which the projections are based”²*
- 1.13 Whilst UPC in Cardiff may not wholly be a result of the mis-estimation of international migration (e.g. there could also be mis-estimation of internal migration, or issues with the Census estimates), UPC could be accounted for within any of the historical components of change and the overall impact on a projection for Cardiff would be comparable: a projection with lower levels of growth than if it were excluded.
- 1.14 In 2015, Edge incorporated UPC within their international migration scenarios for Bradford, which resulted in *higher* levels of population growth as UPC was *positive*.^{3,4} The Bradford case (positive UPC leading to higher migration assumption) and Cardiff (negative UPC leading to lower migration assumption) both follow the same consistent principle. **This is methodological consistency, not a vulnerability.**

¹ ONS 2024 [Analysis of rebased mid-year population estimates following Census 2021](#)

² GLA 2025 [ONS 2022-based Subnational Projections](#)

³ CBMDC 2015 [Bradford Local Plan Core Strategy Examination](#)

00909⁴ Planning Inspectorate 2016 [Report to the City of Bradford](#)

- 1.15 The issue of UPC was also discussed during the [previous Cardiff Examination](#) in relation to the scenarios produced by Edge Analytics. Although the 2001–2011 UPC adjustment was positive (compared to negative between 2011 and 2021), **the Inspector was supportive of the inclusion of UPC in the historical back series** (see paragraphs 4.4 to 4.7 of the Report on the Examination into Cardiff Local Development Plan 2006–2026).

International Migration

- 1.16 The Edge Analytics Demographic Update report for Cardiff published in May 2026 summarised the latest international migration estimates from ONS:

“In November 2025, ONS further revised the December 2024 UK estimate downwards from 431,000 to 345,000. This adjustment has been made following changes to the methods used to estimate EU+ and British national migration. The estimate for year ending June 2025 was 204,000, driven by a continued gradual long-term increase in emigration and a decrease in immigration for study and work.”⁵

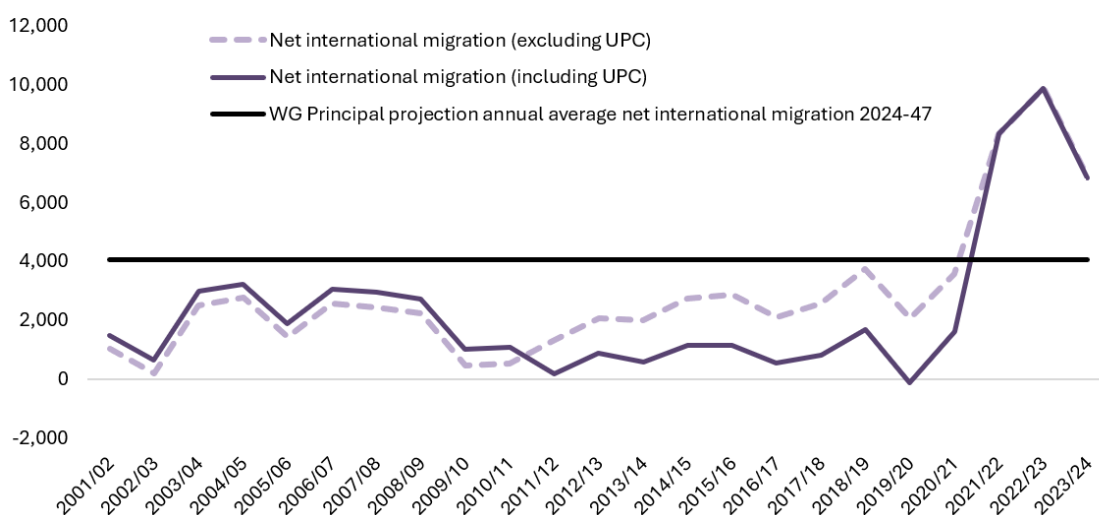
- 1.17 These estimates show levels of net international migration continue to decline from the peak seen in 2021–2023. The **latest ONS data**, published after the Edge Analytics report was produced, further reinforces this:

At 171,000, [UK] long-term international net migration for year ending (YE) December 2025 has nearly halved from YE December 2024 (updated to 331,000); this level was last seen when the new immigration system was introduced in early 2021, and the coronavirus (COVID-19) pandemic travel restrictions were still in place.⁶

- 1.18 **The reduction in net international migration to the UK strengthens Edge Analytics’ recommendation that caution should be exercised with relying on projections that continue the recent unprecedented levels of net international migration.**

- 1.19 International migration is an important driver of growth in Cardiff and this is unlikely to change. However, the levels projected under the Welsh Government’s 2022-based projection (averaging +4,052 per year 2024–2047) are higher than in any of the years up to mid-year 2021:

Net International Migration: Cardiff



Source: ONS

⁵ Edge Analytics (2025) Cardiff Demographic Update

⁶ ONS 2026 [Long-term international migration, provisional: year ending December 2025](#)

Household Formation

- 1.20 The 2022-based household projections from Welsh Government are the first to take account of the 2021 Census and therefore provide an important update to the demographic evidence base for Cardiff. Importantly, the 2022-based household projections include data from the 2001, 2011 and 2021 Censuses⁷ (i.e. they are not just reliant on the 2021 Census).
- 1.21 As the latest official projection, the application of the 2022-based household growth assumptions is entirely justified. Pressure on household finances continue, with high levels of unaffordability and financial constraints. Estimating how these might change in the future (and how it could impact household formation) is challenging. This is coupled with a continued ageing of the population and declining fertility rates.
- 1.22 For these reasons, **no adjustments to the 2022-based household formation assumptions were considered in the formulation of the Cardiff Demographic Update**. Furthermore, whilst Edge Analytics does apply adjustments to the household formation rates in England (through improvements in the young adult age groups as a household growth sensitivity outcome) the same is not routinely done in Wales. This is due to the differences between the two official projection methodologies: Welsh Government utilises a ‘membership rate’ approach, with associated average household size assumptions. In England, a ‘headship rate’ methodology is used.
- 1.23 Rather than applying subjective adjustments to the membership rates, a more transparent and pragmatic approach in Wales would be to apply household formation rates from previous official projections. As summarised in the Edge Analytics report, the 2022-based Welsh Government household projections result in *higher* levels of household growth than the 2018-based projections (Table 7 of the Edge Analytics report). This is largely a function of the official population projections to which the household growth assumptions were applied: the 2022-based population projections result in much higher growth than the previous 2018-based.
- 1.24 However, if the household formation assumptions (membership rates and average household size) from the official projections are applied to the same population growth trajectory, the 2018-based assumptions result in *higher* levels of household growth. This is because the 2022-based household projections assume a slightly higher average household size than the 2018-based rates, as well as a smaller decline in average household size over the 25-year projection period. This reflects the Census data and the changes in household size and structure that have occurred since the previous Census.

⁷ Welsh Government 2025 [Local authority household projections](#)

Other

- 1.25 HBF notes that although reference is made to an adjustment to take account of UPC in the 2026 Edge Analytics document, no reference is made to this in the previous 2021 document.
- 1.26 UPC is routinely accounted for by Edge Analytics, consistent with Edge Analytics' approach in all previous rounds of forecasting for Cardiff. In the 2021 report, the post-2021 Census rebased MYEs (2012–2021) were not available and therefore no UPC component was included for the post-2011 MYE. The positive UPC adjustment in the 2001–2011 MYE was included in the calibration of future migration assumptions.

APPENDIX A SUMMARY OF RESPONSES

Q3(i) Is the 26,400 target justified? Should it be higher?

RESPONDENT	RESPONSE	EDGE ANALYTICS RESPONSE
CARDIFF COUNCIL CD08	No, 26,400 is justified and sound. The requirement is based on demographic modelling by Edge Analytics (RLDP35 + May 2026 update), incorporating WG household projections, migration trends, household formation and economic alignment. The Council rejects HBF's case for a higher figure: affordability cannot be guaranteed by increased volume; no alternative demographic modelling has been provided; and higher numbers would undermine brownfield-first strategy, increase infrastructure burdens and risk non-delivery.	
MR ANDREW EVANS REP 99 (GJP)	No, target should be higher. 26,400 does not reflect Cardiff's capital city status or its Future Wales role. The adopted LDP ran a 38% shortfall (15,140 units) with affordable housing only 43% delivered. The RLDP 'double counts' landbank from the previous plan. Housing requirement should be increased above 26,400 to address unmet residual need. The trajectory shows the requirement met by 2032–33, leaving 3 years with no delivery, capacity exists for more.	1,600 remains reasonable based on demographics.
LIGHTWOOD STRATEGIC REP 84	No, target should be at least 29,000. The 26,400 figure (including 10% buffer) is too low. Lightwood argues the WG-2022 Principal projection +10% gives a minimum target of 29,000. They characterise 1,600 dpa as the floor, not an appropriate midpoint. Cardiff is the 'economic engine' of Wales, therefore plans should be more aspirational. Benchmarked Cardiff against English standard method, generating a need of 1,880 dpa (affordability-adjusted).	As cautioned, the <i>Principal</i> projection from WG carries forward high levels of international migration that are not considered appropriate – see commentary in this note for further info.
TAYLOR WIMPEY	No, Option C / High Growth should be selected. Medium Growth (26,400) lacks ambition for a National Growth Area capital. The 2018-based projections that informed the Plan have been superseded. WG 2025-based estimates of additional housing need identify a 9,400-home existing unmet need plus 8,700 new	As cautioned, the <i>Principal</i> projection from WG carries forward high levels of international migration that are not

RESPONDENT	RESPONSE	EDGE ANALYTICS RESPONSE
REP 133 (BOYER)	homes/year newly arising. Cardiff is 37% short of its LDP target over 16 years. High Growth (30,500+) is needed to address compounded under-delivery and align with 2022-based projections.	considered appropriate – see commentary in this note for further info.
PERSIMMON HOMES (EAST WALES) REP 102 (SAVILLS)	No, target should be higher. Agrees with HBF. 26,400 lacks aspiration for Cardiff's capital status. The adopted LDP set 41,415 homes but only 26,245 are anticipated by end of plan (a ~15,000-home shortfall). The dwelling-led scenario is itself driven by past delivery rates, not demographic evidence — compounding previous under-delivery. RLDP should adopt highest growth option to address accumulated need.	The dwelling-led population growth (and dwelling figure) outcomes are aligned with recent demographic trends (or are slightly above), as evidenced in the Edge Analytics report.
HOME BUILDERS FEDERATION REP 85	No, supports a higher figure. Agrees with Persimmon. Recent WG housing need data (2026) indicates growing need. A higher target would also deliver more affordable homes. The dwelling-led approach has restricted potential housing levels and is inconsistent with Cardiff's status as a regional growth centre.	See above.
BARRATT REDROW / LICHFIELDS REP 77	No, requirement should be 1,850 dpa minimum. Lichfields submitted at deposit stage that the requirement should rise from 1,600 to 1,850 dpa (base 27,750; +10% = 30,525). Council previously dismissed Option C as too high on 2018-based projection grounds — but the 2022-based projections now show WG-forecast population growth of 56,992 over the plan period vs the Plan's assumed 39,373. It is now the Council's preferred strategy, not Option C, that departs from latest demographic evidence. Edge Analytics apply a 'policy on' adjustment on international migration but make no parallel adjustment for household formation — which would push the figure higher. Cardiff's overcrowding rate of 3.9% is the highest in Wales.	International migration within the <i>Principal</i> projection is in excess of historical levels of net international migration (excluding the recent anomalous years) – see commentary in main body of note. It is not a 'policy on' adjustment – it is a balanced and reasonable assumption: failing to account for UPC mis-represents past trends.

Q3(i) Does the target need to change in light of the 2022-based projections?

RESPONDENT	RESPONSE	EDGE ANALYTICS RESPONSE
CARDIFF COUNCIL CD08	No change needed. Updated Edge Analytics report (May 2026) reviewed the 2022-based projections and still concludes 1,600 dpa is a reasonable planning basis. The 2022-based projections are trend-based, sensitive to post-pandemic volatility and suppressed migration, not reliable for long-term planning. WG projections are a starting point, not a requirement. 26,400 remains deliverable and economically aligned.	
MR ANDREW EVANS REP 99 (GJP)	Yes, target should increase. The 2022-based projections are informed by the 2021 Census and are more up-to-date and accurate. They show significantly higher household growth than 2018-based figures. The WG-2022 Principal projection implies 1,758 dpa (26,370 total) above the Plan's 1,600 dpa. Failure to reflect this will cause demand to outstrip supply and worsen affordability. The dwelling-led figure of 1,600 was anchored to 2018-based population data.	See comments above on <i>Principal</i> projection. 1,600 remains appropriate based on recent demographic trends.
LIGHTWOOD STRATEGIC REP 84	Yes, strongly. The 2022-based projections are a key issue. The Plan's need figure of 1,600 dpa sits just below the bottom of the WG-2022 range once converted to dwellings (Principal = 1,758, High = 1,842, Trend-5yr = 1,931). Edge Analytics characterises 1,600 as the 'middle' but Lightwood considers this a Council-defending framing. Critically, the WG conformity statement (April 2025) predates the 2022-based projections — it cannot be relied on to endorse the current ambition level. Supply analysis shows the Plan falls 2,633 homes short of the 10% buffer under the Principal projection without any new allocations.	See comments above on Principal projection.
TAYLOR WIMPEY REP 133 (BOYER)	Yes, essential uplift. Edge Analytics' May 2026 report is noted but TW consider 1,600 dpa insufficient. The 2022-based Principal projection forecasts 17% population growth vs 6.8% under 2018-based, a step-change. All scenarios (LowPop: 1,842; Principal: 1,758; HighPop: 1,632) exceed 1,600 dpa. Even the lowest WG variant shows the current requirement falls short. Option C (High Growth) is no longer unrealistic in light of revised projections. Plan should reflect 2022-based demographics plus historic unmet need.	The WG projections rely on levels of net international migration that are not considered appropriate based on the latest international migration estimates to the UK.
PERSIMMON HOMES (EAST WALES)	2022-based projections must be considered. PPW para 4.2.6 requires the latest WG projections alongside LHMA to set housing requirements. The 2022-based projections (published November 2025) have not been fully reflected. Cardiff projected to see second-largest percentage increase in Wales at 11.1% (169,000 households by 2032). The 2022-based Principal projection implies 17% population growth vs 6.8% previously.	2022-based projections have been fully considered, but caution urged due to their approach to recent

RESPONDENT	RESPONSE	EDGE ANALYTICS RESPONSE
REP 102 (SAVILLS)	Persimmon notes Edge Analytics concludes 1,600 dpa remains reasonable, but argues Cardiff's position in the National Growth Area demands a more policy-aspirational approach beyond demographic floor.	unprecedented international migration.
HOME BUILDERS FEDERATION REP 85	2022-based projections cannot be ignored. DPM and PPW both require the most up-to-date WG projections as a fundamental part of the evidence base. The 2022-based projections imply 1,758 dpa, ~10% above the Plan's 1,600. HBF notes Edge Analytics' May 2026 report acknowledges a shift from 6.8% to 17% population growth but still endorses 1,600. In HBF's view this ignores the growth signal. The Council's justification rests heavily on predicted reductions in international migration — but Cardiff's capital city status, university, economic diversity and transport links mean international migration will remain a strong driver.	2022-based projections have been considered. As per comments, UK net international migration levels have reduced to pre-2021 levels – net international migration in Cardiff between 2021 and 2024 was above any level seen over the last 20 years.
BARRATT REDROW / LICHFIELDS REP 77	2022-based projections require a higher figure and Edge's treatment of them is flawed. DPM (5.34–5.36) and PPW (4.2.6–4.2.7) mandate use of latest WG projections. The 2022-based Principal implies 1,758 dpa, ~10% above the Plan. Edge Analytics (May 2026) cautions against the highest scenarios due to unprecedented international in-migration but Lichfields argues Edge applies a 'policy on' reduction to migration without applying any equivalent adjustment to household formation rates, which the 2021 census shows are suppressed by housing market exclusion (concealed households). Additionally, Edge cannot attribute all UPC to international migration as the demographic report underpinning the 2022-based projections has not yet been published. Even without elevated migration, Cardiff's economic aspirations require in-migration growth to sustain labour force. LHMA-based need (affordable + market) = 1,726 dpa on 2018 figures — would be materially higher on 2022 data.	See comments on international migration and UPC. Household formation assumptions were drawn from the 2022-based projection – see main text in this note for a summary of justification.

EDGE ANALYTICS

Edge Analytics Ltd

Nexus, Discovery Way
University of Leeds, Leeds
LS2 3AA
0113 819 5087

www.edgeanalytics.co.uk

Registered in England
Registration Number 05478834