

2009 Round Demographic Projections using the SHLAA

Background

In August 2010 revised London Plan borough projections were published as *GLA Intelligence Update 16-2010*. These were based on the GLA 2009 Round of demographic projections and the housing targets in the draft replacement *London Plan* (October 2009).

The projections in this *Update* use the same methodology as the London Plan projections but have incorporated the borough housing development published in the 2009 Strategic Housing Land Availability Assessment (SHLAA).

See: <http://www.london.gov.uk/shaping-london/london-plan/docs/strategic-housing-land-study-09.pdf>,

Population has been linked to households using the marital status rates and household representative rates as projected in the CLG 2006-based borough-level household projections that were published in March 2009 (see *DMAG Update 04-2009*).

The projections incorporate known births and deaths up to mid-2008 and follow the fertility and mortality rate assumptions made by ONS and used in the 2008-based national population projections for England (see *DMAG Update 14-2009*, October 2009).

Projections for Inner London and Outer London are shown in the Annex tables using the definitions adopted for the *London Plan*.

These projections are the same as the revised London Plan projections as far as 2011. Between 2011 and 2021 the SHLAA projections are slightly higher as the London Plan housing targets were based on a slight reduction on the SHLAA annual average for 2011/21; 33,380 compared to 36,000. After 2021 in most boroughs the SHLAA projections are lower than those in the London Plan due to reduced identified capacity compared to a continuation of the London Plan targets. The most significant differences, all reductions, are to be seen in Greenwich, Newham, Tower Hamlets and Barnet, which had the highest annual London Plan targets, each well in excess of 2,000 new homes per annum.

Housing Provision

From 2009 the projections use the annual average borough housing capacities for 2009/11, 2011/16, 2016/21, 2021/26 and 2026/31 (equivalent to Table 4.15 of the SHLAA). These capacities include conventional supply on identified large and small sites, non-self contained accommodation and dwellings returned from vacant.

Table 1: Estimated Annual Average Housing Capacities for London boroughs, by SHLAA phase

| | 2009-11 Phase 1 | 2011-16 Phase 2 | 2016-21 Phase 3 | 2021-26 Phase 4 | 2026-31 Phase 5 |
|-------------------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|
| City of London | 92 | 74 | 132 | 97 | 97 |
| Camden | 822 | 812 | 749 | 691 | 592 |
| Greenwich | 1531 | 2870 | 2374 | 1494 | 426 |
| Hackney | 1319 | 1380 | 1092 | 964 | 722 |
| Hammersmith and Fulham | 503 | 586 | 712 | 601 | 391 |
| Islington | 1815 | 1461 | 1188 | 1240 | 1054 |
| Kensington and Chelsea | 647 | 381 | 817 | 331 | 142 |
| Lambeth | 1770 | 1530 | 1392 | 1587 | 1333 |
| Lewisham | 882 | 1558 | 922 | 901 | 828 |
| Newham | 1125 | 2939 | 2210 | 1015 | 625 |
| Southwark | 1894 | 2153 | 2270 | 1220 | 1185 |
| Tower Hamlets | 3783 | 2860 | 3135 | 2013 | 1118 |
| Wandsworth | 1751 | 1129 | 1580 | 1331 | 737 |
| Westminster | 1302 | 1019 | 721 | 526 | 507 |
| Barking and Dagenham | 887 | 1740 | 1330 | 959 | 758 |
| Barnet | 658 | 3491 | 1170 | 1707 | 710 |
| Bexley | 150 | 318 | 414 | 435 | 398 |
| Brent | 771 | 1267 | 967 | 617 | 308 |
| Bromley | 632 | 751 | 617 | 400 | 335 |
| Croydon | 1515 | 1707 | 1326 | 1023 | 1038 |
| Ealing | 474 | 1014 | 862 | 990 | 640 |
| Enfield | 451 | 585 | 674 | 512 | 248 |
| Haringey | 449 | 1265 | 577 | 413 | 486 |
| Harrow | 570 | 523 | 348 | 418 | 466 |
| Havering | 468 | 1202 | 1423 | 687 | 433 |
| Hillingdon | 1603 | 863 | 480 | 602 | 445 |
| Hounslow | 1279 | 507 | 512 | 537 | 369 |
| Kingston upon Thames | 248 | 441 | 375 | 317 | 261 |
| Merton | 321 | 433 | 345 | 342 | 393 |
| Redbridge | 1168 | 903 | 679 | 373 | 306 |
| Richmond upon Thames | 344 | 325 | 239 | 190 | 165 |
| Sutton | 389 | 321 | 223 | 237 | 197 |
| Waltham Forest | 688 | 992 | 760 | 648 | 571 |
| Inner London | 19235 | 20752 | 19294 | 14009 | 9758 |
| Outer London | 13063 | 18647 | 13321 | 11406 | 8526 |
| Greater London | 32298 | 39399 | 32615 | 25415 | 18284 |

Greater London Results

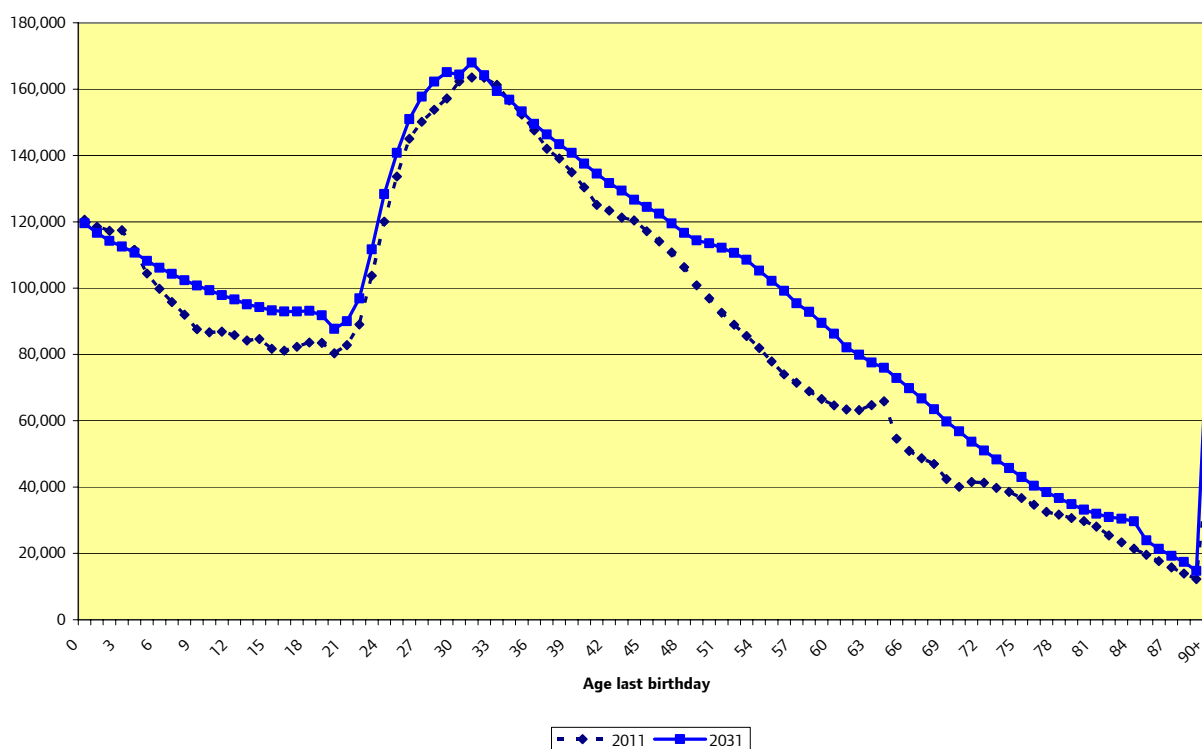
Between 2011 and 2031 London's population is projected to increase by 888 thousand persons, equivalent to 11 per cent. Households are expected to increase by 585 thousand, or 18 per cent. The difference in the rates of change is a reflection of the 6 per cent decline in average household size from 2.32 to 2.20.

The structure of household change is dominated by the 417 thousand increase in one-person households that accounts for 71 per cent of the total household growth between 2011 and 2031. Married couples are the only household type projected to decline, with the loss being more than compensated by the increase in cohabiting couples.

Table 2: Summary Population and Household Projection for Greater London, (thousands, except average household size)

| | 2006 | 2011 | 2016 | 2021 | 2026 | 2031 |
|-------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Married Couples | 1,037.2 | 964.2 | 917.1 | 874.7 | 837.6 | 817.3 |
| Cohabiting Couples | 333.1 | 400.3 | 459.4 | 506.7 | 546.2 | 573.8 |
| Lone Parents | 317.7 | 347.8 | 378.8 | 398.3 | 408.8 | 415.1 |
| Other (2+ Adults) | 340.0 | 357.7 | 381.8 | 402.6 | 419.7 | 432.1 |
| One-person | 1,146.5 | 1,252.7 | 1,381.7 | 1,498.5 | 1,599.0 | 1,669.4 |
| Total Households | 3,174.5 | 3,322.8 | 3,518.8 | 3,680.9 | 3,811.3 | 3,907.7 |
| Household Population | 7,434.1 | 7,713.7 | 8,039.1 | 8,286.8 | 8,473.2 | 8,596.7 |
| Average Household Size | 2.342 | 2.321 | 2.285 | 2.251 | 2.223 | 2.200 |
| Total Population | 7,526.9 | 7,806.8 | 8,132.7 | 8,381.1 | 8,569.2 | 8,695.2 |
| Communal Population | 92.8 | 93.1 | 93.6 | 94.3 | 96.0 | 98.4 |

Chart 1: Age Structure 2011 and 2031, Greater London



Between 2011 and 2031 the growth in population is seen at nearly all age groups. The major exception is the under-5s, which reflects the downward revision in national fertility assumptions. The changes demonstrate both a distinct ageing pattern, particularly with an increase of over 350 thousand persons between ages 45 and 64 as well as a significant increase in the child population, with 108 thousand more children of school age (4-15). The elderly population is projected to grow particularly fast. The over 65s are projected to increase by 30 per cent, or 260 thousand, to reach 1.13 million by 2031. The over 90s are expected to almost double to 92 thousand.

Table 3: Projected Resident Labour Force aged 16-74, Greater London (thousands)

| | 2006 | 2011 | 2016 | 2021 | 2026 | 2031 |
|-----------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Persons | 3902.0 | 4071.2 | 4266.0 | 4401.3 | 4482.5 | 4513.7 |
| Males | 2119.5 | 2183.7 | 2258.3 | 2306.2 | 2341.0 | 2349.8 |
| Females | 1782.5 | 1887.5 | 2007.7 | 2095.1 | 2141.5 | 2164.0 |
| % Female | 45.7 | 46.4 | 47.1 | 47.6 | 47.8 | 47.9 |

The resident labour force has been projected using the same borough level age-specific economic activity rates as in the GLA 2008 Round of projections, which are based on the 2001 Census and improved according to ONS national projections until 2020. The projected borough rates are then held constant. Between 2011 and 2031 there is a 442 thousand increase in the resident labour force aged 16-74, equivalent to 11 per cent. The female contribution to the labour force rises by 276 thousand and is 62 per cent of the total growth.

Annex: Borough Results

Annex Table 1: Population Projections, London boroughs (thousands)

| | 2006 | 2011 | 2016 | 2021 | 2026 | 2031 |
|---------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| City of London | 8.8 | 9.7 | 10.3 | 11.3 | 12.0 | 12.6 |
| Camden | 203.4 | 210.9 | 217.4 | 223.9 | 230.8 | 237.6 |
| Greenwich | 230.5 | 238.1 | 261.5 | 279.2 | 288.6 | 289.3 |
| Hackney | 217.7 | 231.5 | 242.7 | 250.7 | 257.4 | 261.9 |
| Hammersmith & Fulham | 175.8 | 180.6 | 185.3 | 190.5 | 194.2 | 195.7 |
| Islington | 188.9 | 208.8 | 220.3 | 229.2 | 238.0 | 244.4 |
| Kensington & Chelsea | 166.4 | 169.9 | 172.6 | 178.7 | 180.2 | 180.4 |
| Lambeth | 286.0 | 300.2 | 312.9 | 323.4 | 335.0 | 343.6 |
| Lewisham | 263.5 | 272.7 | 288.0 | 297.1 | 306.5 | 314.9 |
| Newham | 259.3 | 267.9 | 295.4 | 314.2 | 322.3 | 326.6 |
| Southwark | 267.1 | 285.5 | 304.9 | 324.4 | 334.3 | 343.9 |
| Tower Hamlets | 221.0 | 248.7 | 270.9 | 294.9 | 308.2 | 313.8 |
| Wandsworth | 282.7 | 297.5 | 306.4 | 318.3 | 326.4 | 328.9 |
| Westminster | 210.4 | 217.2 | 223.8 | 227.2 | 227.7 | 228.8 |
| Barking & Dagenham | 169.1 | 177.8 | 194.9 | 206.9 | 214.6 | 219.8 |
| Barnet | 323.9 | 330.6 | 363.1 | 371.2 | 384.2 | 388.0 |
| Bexley | 217.9 | 217.4 | 217.9 | 220.3 | 223.6 | 226.8 |
| Brent | 274.1 | 279.6 | 289.2 | 295.3 | 297.9 | 298.1 |
| Bromley | 299.4 | 302.4 | 306.4 | 310.0 | 312.8 | 315.7 |
| Croydon | 334.5 | 342.9 | 354.1 | 362.3 | 368.5 | 375.3 |
| Ealing | 310.3 | 319.5 | 329.2 | 336.1 | 343.8 | 347.5 |
| Enfield | 287.9 | 294.2 | 299.0 | 304.7 | 308.8 | 310.5 |
| Haringey | 230.3 | 237.2 | 248.8 | 253.2 | 256.7 | 260.7 |
| Harrow | 216.0 | 220.7 | 224.3 | 225.9 | 228.1 | 230.9 |
| Havering | 228.2 | 231.6 | 242.0 | 252.4 | 262.7 | 272.4 |
| Hillingdon | 248.4 | 261.8 | 270.1 | 274.6 | 280.3 | 283.8 |
| Hounslow | 222.5 | 237.2 | 242.4 | 246.9 | 251.4 | 254.0 |
| Kingston upon Thames | 152.1 | 155.3 | 159.6 | 163.2 | 166.1 | 168.7 |
| Merton | 194.8 | 198.7 | 201.7 | 203.9 | 206.3 | 209.4 |
| Redbridge | 248.2 | 258.8 | 266.5 | 272.0 | 274.6 | 276.8 |
| Richmond upon Thames | 181.9 | 186.4 | 189.4 | 191.2 | 192.4 | 193.4 |
| Sutton | 182.7 | 185.9 | 187.5 | 189.0 | 191.1 | 193.0 |
| Waltham Forest | 223.0 | 229.4 | 234.4 | 239.1 | 243.7 | 248.2 |
| Inner London | 2981.6 | 3139.3 | 3312.4 | 3463.0 | 3561.6 | 3622.3 |
| Outer London | 4545.3 | 4667.5 | 4820.3 | 4918.1 | 5007.6 | 5072.9 |
| Greater London | 7526.9 | 7806.8 | 8132.7 | 8381.1 | 8569.2 | 8695.2 |

Annex Table 2: Household Projections, London boroughs (thousands)

| | 2006 | 2011 | 2016 | 2021 | 2026 | 2031 |
|---------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| City of London | 5.1 | 5.5 | 5.9 | 6.5 | 7.0 | 7.5 |
| Camden | 94.5 | 98.8 | 102.9 | 106.6 | 110.1 | 113.0 |
| Greenwich | 102.5 | 107.0 | 121.4 | 133.2 | 140.7 | 142.8 |
| Hackney | 91.7 | 98.9 | 105.8 | 111.3 | 116.1 | 119.7 |
| Hammersmith & Fulham | 78.5 | 80.6 | 83.5 | 87.0 | 90.0 | 92.0 |
| Islington | 88.3 | 99.0 | 106.3 | 112.2 | 118.4 | 123.7 |
| Kensington & Chelsea | 81.2 | 83.1 | 85.0 | 89.0 | 90.7 | 91.4 |
| Lambeth | 124.8 | 131.6 | 139.3 | 146.3 | 154.2 | 160.9 |
| Lewisham | 112.6 | 116.3 | 124.1 | 128.7 | 133.2 | 137.4 |
| Newham | 98.0 | 102.6 | 117.3 | 128.4 | 133.5 | 136.6 |
| Southwark | 114.5 | 123.2 | 134.0 | 145.4 | 151.5 | 157.4 |
| Tower Hamlets | 91.5 | 107.5 | 121.8 | 137.5 | 147.6 | 153.2 |
| Wandsworth | 126.1 | 133.3 | 139.0 | 146.9 | 153.5 | 157.2 |
| Westminster | 105.2 | 109.9 | 115.0 | 118.6 | 121.2 | 123.7 |
| Barking & Dagenham | 70.5 | 73.8 | 82.5 | 89.2 | 94.0 | 97.8 |
| Barnet | 130.8 | 134.4 | 151.8 | 157.7 | 166.2 | 169.8 |
| Bexley | 91.3 | 92.6 | 94.2 | 96.3 | 98.5 | 100.4 |
| Brent | 104.7 | 108.7 | 115.0 | 119.9 | 123.0 | 124.5 |
| Bromley | 129.6 | 132.5 | 136.3 | 139.4 | 141.4 | 143.1 |
| Croydon | 142.9 | 149.6 | 158.1 | 164.8 | 169.9 | 175.1 |
| Ealing | 121.5 | 124.9 | 130.0 | 134.3 | 139.2 | 142.4 |
| Enfield | 115.9 | 118.7 | 121.7 | 125.0 | 127.6 | 128.8 |
| Haringey | 95.6 | 98.8 | 105.1 | 108.0 | 110.1 | 112.5 |
| Harrow | 82.7 | 85.7 | 88.3 | 90.0 | 92.1 | 94.5 |
| Havering | 94.5 | 97.1 | 103.3 | 109.5 | 115.7 | 121.8 |
| Hillingdon | 100.0 | 106.6 | 110.9 | 113.3 | 116.3 | 118.5 |
| Hounslow | 87.8 | 94.1 | 96.6 | 99.1 | 101.8 | 103.7 |
| Kingston upon Thames | 63.7 | 65.1 | 67.3 | 69.1 | 70.7 | 72.0 |
| Merton | 82.1 | 84.1 | 86.3 | 88.0 | 89.7 | 91.7 |
| Redbridge | 95.9 | 100.5 | 105.0 | 108.4 | 110.3 | 111.8 |
| Richmond upon Thames | 79.2 | 80.8 | 82.4 | 83.6 | 84.6 | 85.4 |
| Sutton | 78.7 | 81.0 | 82.6 | 83.7 | 84.9 | 85.9 |
| Waltham Forest | 92.6 | 96.3 | 100.1 | 103.9 | 107.7 | 111.5 |
| Inner London | 1314.5 | 1397.4 | 1501.2 | 1597.7 | 1667.7 | 1716.5 |
| Outer London | 1860.0 | 1925.3 | 2017.6 | 2083.2 | 2143.6 | 2191.2 |
| Greater London | 3174.5 | 3322.8 | 3518.8 | 3680.9 | 3811.3 | 3907.7 |

Annex Table 3: Resident Labour Force Projections, London boroughs (thousands)

| | 2006 | 2011 | 2016 | 2021 | 2026 | 2031 |
|---------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| City of London | 5.6 | 6.1 | 6.5 | 7.3 | 7.8 | 8.2 |
| Camden | 110.0 | 114.9 | 118.8 | 122.3 | 125.2 | 127.9 |
| Greenwich | 112.5 | 116.1 | 129.9 | 140.1 | 144.7 | 143.2 |
| Hackney | 102.5 | 111.6 | 119.3 | 124.8 | 128.7 | 130.6 |
| Hammersmith & Fulham | 98.9 | 102.4 | 106.3 | 110.5 | 112.9 | 113.3 |
| Islington | 101.0 | 114.8 | 123.0 | 129.0 | 134.0 | 136.9 |
| Kensington & Chelsea | 90.3 | 92.6 | 94.9 | 99.1 | 99.4 | 98.4 |
| Lambeth | 159.1 | 169.0 | 178.4 | 185.8 | 192.8 | 196.9 |
| Lewisham | 140.9 | 147.4 | 156.2 | 160.3 | 164.7 | 168.8 |
| Newham | 115.3 | 120.4 | 136.1 | 147.9 | 153.3 | 156.4 |
| Southwark | 139.3 | 151.2 | 163.0 | 174.2 | 178.5 | 182.5 |
| Tower Hamlets | 103.5 | 120.2 | 133.7 | 148.4 | 155.5 | 157.2 |
| Wandsworth | 167.5 | 176.8 | 183.0 | 190.9 | 195.2 | 194.4 |
| Westminster | 118.9 | 123.6 | 128.8 | 131.2 | 130.5 | 129.1 |
| Barking & Dagenham | 77.2 | 81.7 | 90.3 | 96.2 | 100.0 | 102.2 |
| Barnet | 165.2 | 168.7 | 188.3 | 192.4 | 199.1 | 199.3 |
| Bexley | 112.0 | 113.2 | 113.5 | 114.2 | 115.0 | 115.7 |
| Brent | 137.3 | 138.6 | 144.3 | 147.8 | 148.2 | 146.5 |
| Bromley | 154.0 | 157.6 | 160.6 | 162.0 | 162.0 | 161.6 |
| Croydon | 173.3 | 178.0 | 183.9 | 187.3 | 188.9 | 190.6 |
| Ealing | 161.0 | 164.4 | 169.4 | 172.5 | 175.4 | 175.5 |
| Enfield | 141.9 | 144.7 | 146.7 | 148.8 | 149.6 | 148.8 |
| Haringey | 118.9 | 123.0 | 130.6 | 133.7 | 135.7 | 137.6 |
| Harrow | 112.5 | 115.2 | 117.0 | 117.2 | 117.5 | 117.9 |
| Havering | 115.8 | 120.2 | 126.8 | 132.3 | 137.2 | 142.1 |
| Hillingdon | 129.1 | 136.9 | 141.1 | 142.4 | 144.4 | 145.0 |
| Hounslow | 116.8 | 123.9 | 125.7 | 127.1 | 128.5 | 128.5 |
| Kingston upon Thames | 83.9 | 85.5 | 87.4 | 88.5 | 89.1 | 89.5 |
| Merton | 105.6 | 107.2 | 108.5 | 108.7 | 108.8 | 109.1 |
| Redbridge | 122.8 | 129.1 | 133.3 | 135.5 | 135.8 | 135.7 |
| Richmond upon Thames | 99.8 | 101.7 | 103.1 | 103.5 | 103.3 | 103.0 |
| Sutton | 98.8 | 101.4 | 102.2 | 102.0 | 102.1 | 101.8 |
| Waltham Forest | 110.5 | 112.9 | 115.4 | 117.4 | 118.7 | 119.5 |
| Inner London | 1565.4 | 1667.2 | 1778.0 | 1871.8 | 1923.1 | 1943.8 |
| Outer London | 2336.6 | 2404.0 | 2488.0 | 2529.5 | 2559.4 | 2570.0 |
| Greater London | 3902.0 | 4071.2 | 4266.0 | 4401.3 | 4482.5 | 4513.7 |

Availability of Data

The projections are available in more detail (eg annual by age/gender of the population for wards as well as for boroughs) on the London Datastore.

<http://data.london.gov.uk/>