

2009 Round Demographic Projections for the London Plan

Background

The Mayor's *London Plan* is the overall strategic plan for London. It sets out an integrated economic, environmental, transport and social framework for the development of the capital over the next 20-25 years. It is an over-arching document that picks up on the 'places and spaces' aspects of all the other Mayoral strategies, and provides the strategic, London-wide context within which boroughs must set their detailed local planning policies.

On 12th October 2009 the Mayor published his consultation draft revised plan, *The London Plan*,

<http://www.london.gov.uk/shaping-london/london-plan/>

alongside his draft Transport and Economic Development strategies.

In October 2009 indicative borough population and household projections were published in *DMAG Update 13-2009*. The only details available at the time were total population and total numbers of households based upon an initial analysis of the impacts of the borough housing provision in the *Plan*. This *Update* presents detailed borough level demographic projections, covering population, households and resident labour force, to support the *Plan* and strategies. Working at borough level and summing to London makes some minor differences in the independently produced London totals published last year.

In January 2010 London Plan borough projections were published as *GLA Intelligence Update 01-2010*. These were based on the GLA 2008 Round of demographic projections, published in February 2009 in *DMAG Briefing 2009-02*.

These new borough projections for the Plan differ from the 2008 Round in the following ways:

- Actual births and deaths are included up to the end of 2007-08 and estimates have been made for 2008-09 based on borough data for 2008 and national trends up until mid-2009,
- Future births are based on the trends in the total fertility rate for England assumed in the ONS 2008-based population projections for England (*DMAG Update 14-2009*), and
- Future age-specific death rates follow the trends used in the ONS 2008-based population projections for England.

The impact of the new fertility assumptions is seen as reduced numbers of projected births - particularly in the short-term - and hence a reduced projected increase in school-children, while the new mortality assumptions imply somewhat better longevity and hence further growth in London's elderly population. The net impact is about 50 thousand fewer residents in 2031.

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

Housing Provision

From 2011 the projections use the annual average borough housing provision targets for 2011/12 to 2020/21 as published in the *London Plan* (at Annex 4). These targets include conventional supply on identified large and small sites, non-self contained accommodation and dwellings returned from vacant. In order to prepare projections to 2031 the same level of provision has been assumed in each borough between 2021 and 2031.

Table 1: Housing Provision Targets for London boroughs, 2011/12 to 2020/21

City of London	110	Barking & Dagenham	1,505
Camden	665	Barnet	2,255
Greenwich	2,595	Bexley	335
Hackney	1,160	Brent	1,065
Hammersmith & Fulham	615	Bromley	565
Islington	1,170	Croydon	1,330
Kensington & Chelsea	585	Ealing	890
Lambeth	1,255	Enfield	560
Lewisham	1,105	Haringey	820
Newham	2,500	Harrow	350
Southwark	2,005	Havering	1,235
Tower Hamlets	2,885	Hillingdon	620
Wandsworth	1,280	Hounslow	475
Westminster	770	Kingston upon Thames	375
		Merton	320
Inner London	18,700	Redbridge	760
		Richmond upon Thames	245
		Sutton	210
		Waltham Forest	760
		Outer London	14,685
		Greater London	33,380

Greater London Results

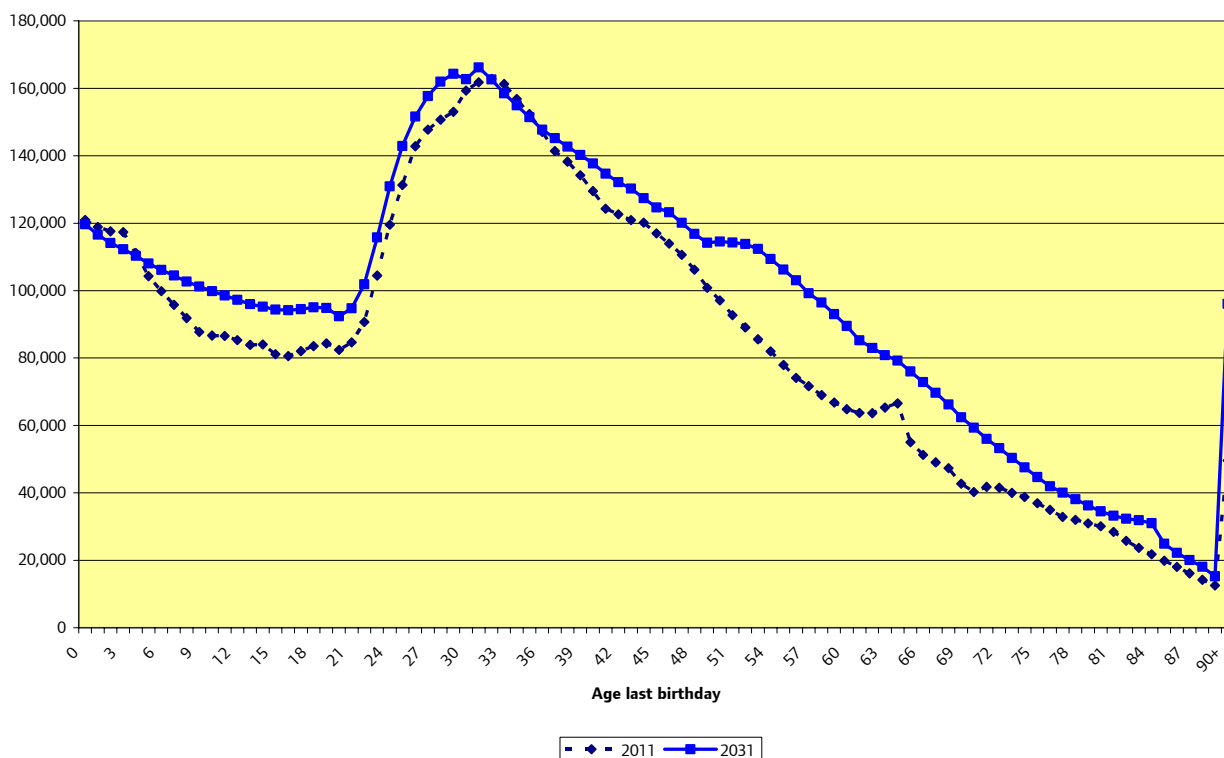
Between 2011 and 2031 London's population is projected to increase by 1.02 million persons, equivalent to 13 per cent. Households are expected to increase by 667 thousand, or 20 per cent. The difference in the rates of change is a reflection of the 6 per cent decline in average household size from 2.32 to 2.18.

The structure of household change is dominated by the 455 thousand increase in one-person households that accounts for 68 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	1037.6	967.5	914.2	876.3	848.0	842.4
Cohabiting Couples	334.3	401.2	457.4	505.4	550.0	588.2
Lone Parents	317.2	344.8	371.1	388.4	401.1	413.2
Other (2+ Adults)	340.6	358.6	379.0	399.7	420.7	441.0
One-person	1147.3	1254.1	1371.3	1490.0	1607.0	1708.7
Total Households	3177.1	3326.1	3493.0	3659.9	3826.8	3993.6
Household Population	7433.9	7704.4	7964.3	8221.6	8472.4	8718.0
Average Household Size	2.340	2.316	2.280	2.246	2.214	2.183
Total Population	7526.9	7798.0	8058.1	8316.2	8569.2	8818.0
Communal Population	92.9	93.6	93.7	94.6	96.7	100.0

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 400 thousand persons between ages 45 and 64 as well as a significant increase in the child population, with 115 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 34 per cent, or nearly 300 thousand, to reach 1.17 million by 2031. The over 90s are expected to almost double to 96 thousand.

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

	2006	2011	2016	2021	2026	2031
Males	2125.4	2189.8	2248.5	2301.6	2359.5	2408.4
Females	1778.5	1869.1	1965.7	2044.9	2101.2	2151.2
Persons	3903.9	4059.0	4214.2	4346.5	4460.6	4559.5
% Female	45.6	46.0	46.6	47.0	47.1	47.2

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. They are then held constant. Between

2011 and 2031 there is a 500 thousand increase in the resident labour force aged 16-74, equivalent to 12 per cent. The female contribution to the labour force rises by 280 thousand and is 56 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	10.6	11.4	12.2	13.0
Camden	203.4	211.4	216.6	222.2	228.4	234.5
Greenwich	230.5	238.3	261.0	283.1	304.5	325.6
Hackney	217.7	231.9	241.9	251.8	262.0	272.3
Hammersmith & Fulham	175.8	177.4	179.1	180.6	182.2	184.9
Islington	188.9	205.8	211.5	217.4	223.4	230.8
Kensington & Chelsea	166.4	170.7	175.7	179.9	183.7	187.1
Lambeth	286.0	298.4	306.9	315.1	322.6	330.0
Lewisham	263.5	272.9	284.1	295.0	306.3	316.9
Newham	259.3	267.6	290.4	313.1	336.8	359.9
Southwark	267.1	285.5	303.6	321.2	339.2	357.2
Tower Hamlets	221.0	248.4	271.0	293.7	316.3	338.6
Wandsworth	282.7	298.5	309.1	318.9	328.1	337.6
Westminster	210.4	218.3	223.4	227.6	230.2	232.9
Barking & Dagenham	169.1	177.9	194.3	210.4	225.6	239.8
Barnet	323.9	332.1	350.5	372.4	392.9	412.1
Bexley	217.9	217.6	218.3	220.1	222.3	224.5
Brent	274.1	273.2	281.1	288.6	295.8	303.1
Bromley	299.4	301.3	300.5	299.2	298.2	297.2
Croydon	334.5	342.8	350.2	358.2	366.3	374.7
Ealing	310.3	320.1	328.8	336.3	343.6	350.2
Enfield	287.9	292.9	294.5	296.2	297.2	298.1
Haringey	230.3	240.6	249.2	257.8	266.6	274.2
Harrow	216.0	220.7	221.7	222.5	223.2	223.9
Havering	228.2	231.4	242.2	253.1	264.1	274.7
Hillingdon	248.4	262.2	267.7	273.2	278.5	282.8
Hounslow	222.5	236.9	241.7	246.0	250.3	254.1
Kingston upon Thames	152.1	154.7	157.5	160.1	162.4	164.6
Merton	194.8	198.0	198.6	199.3	200.1	201.0
Redbridge	248.2	259.8	268.4	276.8	284.8	293.6
Richmond upon Thames	181.9	186.2	188.7	190.6	192.2	193.7
Sutton	182.7	185.6	185.1	185.1	185.3	185.3
Waltham Forest	223.0	229.2	234.3	239.2	244.0	248.9
London Plan Inner	2981.6	3134.6	3284.8	3431.2	3575.8	3721.4
London Plan Outer	4545.3	4663.4	4773.3	4885.1	4993.4	5096.6
Greater London	7526.9	7798.0	8058.1	8316.2	8569.2	8818.0

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

	2006	2011	2016	2021	2026	2031
City of London	5.0	5.4	6.0	6.5	7.1	7.6
Camden	95.1	99.3	102.6	106.0	109.3	112.6
Greenwich	102.2	106.6	119.6	132.6	145.6	158.5
Hackney	91.5	98.6	104.4	110.2	116.0	121.8
Hammersmith & Fulham	80.0	82.4	85.5	88.6	91.6	94.7
Islington	89.8	100.9	106.7	112.6	118.4	124.3
Kensington & Chelsea	81.6	83.4	86.3	89.2	92.1	95.1
Lambeth	124.6	131.7	138.0	144.3	150.5	156.8
Lewisham	112.7	116.4	122.0	127.5	133.0	138.5
Newham	98.0	102.6	115.1	127.6	140.1	152.6
Southwark	115.3	124.0	134.0	144.0	154.1	164.1
Tower Hamlets	91.4	107.5	121.9	136.4	150.8	165.2
Wandsworth	125.8	133.0	139.4	145.8	152.2	158.6
Westminster	105.6	110.2	114.1	117.9	121.8	125.6
Barking & Dagenham	70.4	73.8	81.3	88.8	96.3	103.9
Barnet	131.1	134.5	145.8	157.0	168.3	179.6
Bexley	91.3	92.6	94.3	96.0	97.6	99.3
Brent	101.2	105.8	111.1	116.4	121.8	127.1
Bromley	129.7	132.8	135.6	138.4	141.3	144.1
Croydon	143.1	149.8	156.5	163.1	169.8	176.4
Ealing	121.4	124.8	129.2	133.7	138.1	142.6
Enfield	115.9	118.9	121.7	124.5	127.3	130.1
Haringey	95.9	98.7	102.8	106.9	111.0	115.1
Harrow	82.6	85.6	87.4	89.1	90.9	92.6
Havering	94.5	97.1	103.3	109.5	115.7	121.8
Hillingdon	100.2	106.7	109.8	112.9	116.0	119.1
Hounslow	87.7	93.9	96.3	98.7	101.1	103.4
Kingston upon Thames	64.0	65.4	67.3	69.2	71.0	72.9
Merton	82.4	84.4	86.0	87.6	89.2	90.8
Redbridge	96.6	101.1	104.9	108.7	112.5	116.3
Richmond upon Thames	79.2	80.8	82.0	83.2	84.5	85.7
Sutton	78.8	81.2	82.2	83.3	84.3	85.4
Waltham Forest	92.4	96.2	100.0	103.8	107.6	111.4
London Plan Inner	1318.7	1402.1	1495.6	1589.1	1682.6	1776.1
London Plan Outer	1858.4	1924.1	1997.4	2070.8	2144.2	2217.6
Greater London	3177.1	3326.1	3493.0	3659.9	3826.8	3993.6

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

	2006	2011	2016	2021	2026	2031
City of London	5.7	6.2	6.8	7.4	8.0	8.4
Camden	108.0	113.3	117.1	121.0	124.6	128.0
Greenwich	113.5	117.1	130.4	142.3	152.8	161.8
Hackney	103.5	113.3	120.0	126.1	131.4	136.7
Hammersmith & Fulham	100.1	102.1	105.2	107.9	109.9	112.1
Islington	101.5	113.3	118.2	122.5	125.9	129.8
Kensington & Chelsea	89.4	92.6	96.7	100.0	102.0	103.4
Lambeth	160.4	168.4	174.4	179.7	183.3	185.6
Lewisham	141.6	147.5	153.7	159.0	164.6	170.2
Newham	115.8	120.7	133.6	146.3	159.2	171.6
Southwark	138.6	150.2	161.7	172.1	181.7	191.2
Tower Hamlets	104.3	120.8	133.7	146.2	157.2	166.8
Wandsworth	168.2	178.4	185.2	191.0	195.3	198.8
Westminster	117.5	123.5	128.2	131.8	132.9	133.0
Barking & Dagenham	77.6	82.1	90.6	98.3	105.7	112.6
Barnet	164.6	165.8	181.3	190.4	199.4	207.0
Bexley	111.7	112.9	113.6	114.3	115.1	115.9
Brent	140.0	134.9	139.4	143.3	146.1	147.9
Bromley	154.1	156.0	154.9	152.4	149.3	144.8
Croydon	172.8	177.0	180.4	183.6	186.4	189.1
Ealing	161.2	165.1	169.1	172.2	174.5	176.1
Enfield	142.0	143.3	143.0	142.8	142.1	140.5
Haringey	118.9	126.1	131.2	136.3	141.7	146.5
Harrow	112.6	115.3	115.2	114.8	114.2	113.6
Havering	115.8	120.0	126.9	132.5	137.5	142.5
Hillingdon	128.7	137.3	139.4	141.3	143.1	144.1
Hounslow	117.1	124.0	125.3	126.6	127.9	128.9
Kingston upon Thames	83.4	84.3	85.4	86.3	87.1	87.7
Merton	105.3	106.0	105.9	105.6	105.1	104.5
Redbridge	120.6	126.2	130.1	133.2	136.3	140.3
Richmond upon Thames	100.1	101.6	102.6	103.2	103.7	104.1
Sutton	98.6	100.6	99.9	99.0	98.1	96.8
Waltham Forest	110.6	112.8	115.2	117.1	118.4	119.1
London Plan Inner	1568.2	1667.6	1764.8	1853.3	1928.9	1997.4
London Plan Outer	2335.7	2391.4	2449.4	2493.2	2531.7	2562.1
Greater London	3903.9	4059.0	4214.2	4346.5	4460.6	4559.5

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) for registered users on the GLA Demography Extranet.

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

They are also freely available on the London Datastore. <http://data.london.gov.uk/>

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