

The London Plan: Borough Demographic Projections

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.

The most recent fully developed set of London borough projections was the 2008 Round, published in February 2009 in *DMAG Briefing 2009-02*. The new projections for the *Plan* differ in the following ways:

- in the base period from 2001 to 2007 the London population follows the total changes seen in the ONS mid-year estimates,
- the borough populations from the 2008 Round High projection have been constrained to the revised London totals in the base period,
- housing development for 2007/08 has been taken from the *London Plan Annual Monitoring Report 5* (Table 13). For 2008/09 draft results from the London Development Database have been used, and for 2009/10 and 2010/11 data have been taken from 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>,
- for new housing development from 2011 to 2031 the projections use the annual average borough housing provision targets for 2011/12 to 2020/21 as published in the *London Plan*, and
- population was linked to households by 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 were prepared independently for each borough and will differ from the indicative figures published in October 2009. Projections for Inner London and Outer London are shown in the Annex tables in two forms, first, using the NUTS 2 (Nomenclature of Territorial Units for Statistics) distribution commonly used for demographic statistics and, second, 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

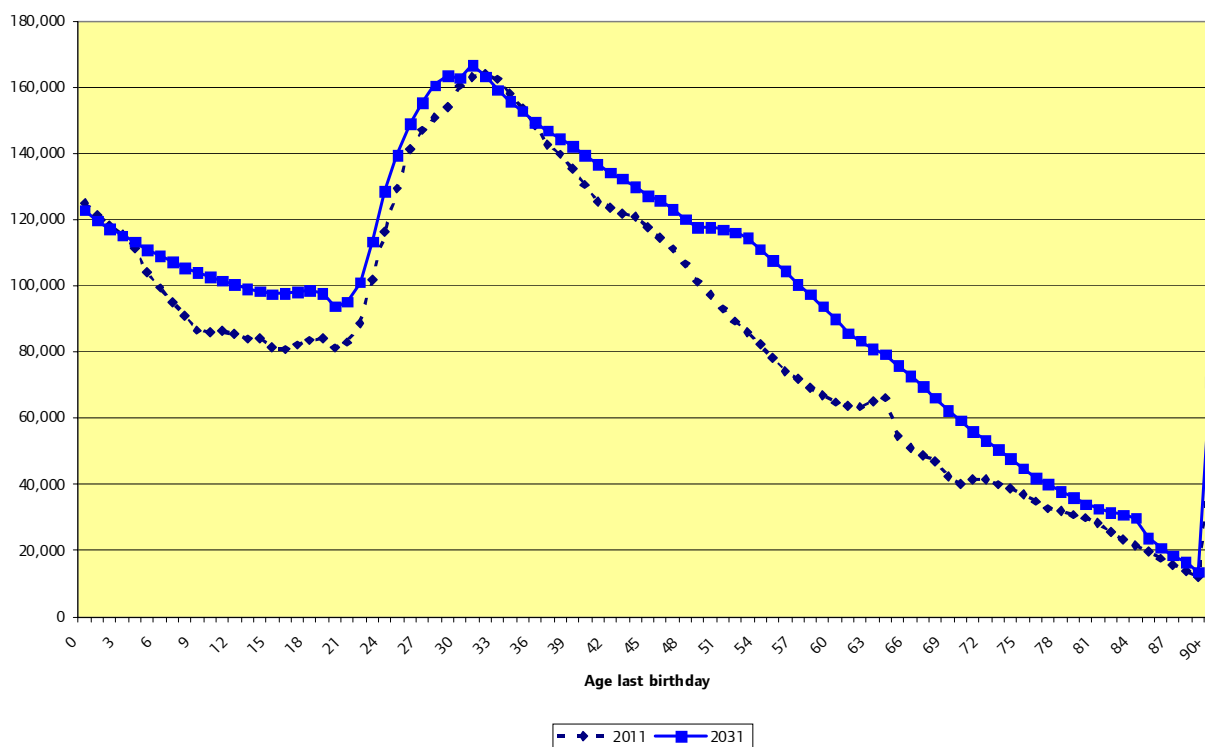
Between 2011 and 2031 London's population is projected to increase by 1.07 million persons, equivalent to nearly 14 per cent. Households are expected to increase by 667 thousand, or 20 per cent. The difference in the rates of change is a reflection of the 5 per cent decline in average household size.

In common with the GLA 2008 round of demographic projections the structure of household change is dominated by the 451 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	1039.9	969.7	916.2	877.3	848.1	841.7
Cohabiting Couples	333.7	401.0	456.8	505.5	551.1	590.3
Lone Parents	317.3	346.2	373.0	391.6	405.0	417.9
Other (2+ Adults)	340.7	357.7	378.0	398.7	420.0	441.1
One-person	1149.0	1255.2	1372.7	1490.4	1606.2	1706.3
Total Households	3180.6	3329.8	3496.7	3663.6	3830.4	3997.3
Household Population	7434.0	7703.6	7986.6	8253.7	8515.2	8772.0
Average Household Size	2.337	2.314	2.284	2.253	2.223	2.194
Total Population	7526.9	7796.6	8079.5	8346.8	8609.6	8868.7
Communal Population	92.9	93.0	92.9	93.1	94.4	96.7

Chart 1: Age Structure 2011 and 2031, Greater London



Between 2011 and 2031 the growth in population is seen at all age groups and demonstrates both a distinct ageing pattern, particularly with an increase of 426 thousand persons between ages 45 and 64 as well as a significant increase in the child population, with 150 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 31 per cent, or 270 thousand, to reach 1.14 million by 2031. The over 90s are expected to increase by 55 per cent to 74 thousand.

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

	2006	2011	2016	2021	2026	2031
Males	2123.5	2189.3	2245.8	2300.4	2360.7	2416.8
Females	1776.2	1871.0	1967.0	2051.4	2112.4	2171.4
Persons	3899.8	4060.4	4212.8	4351.8	4473.1	4588.2

The resident labour force has been projected using the same 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 528 thousand increase in the resident labour force aged 16-74, equivalent to 13 per cent. The female contribution to the labour force rises by 300 thousand and is 57 per cent of the total growth.

Annex: Borough Results

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

	2006	2011	2016	2021	2026	2031
Camden	203.4	212.2	218.8	225.3	232.1	238.5
Kensington & Chelsea	166.4	170.8	176.4	181.0	185.1	188.7
Westminster	210.4	219.0	225.0	229.8	232.9	235.9
City of London	8.8	9.7	10.7	11.6	12.4	13.2
Central boroughs	589.1	611.8	630.9	647.8	662.5	676.2
Hackney	217.7	232.0	242.6	252.9	263.2	273.5
Hammersmith & Fulham	175.8	178.3	181.2	183.9	186.5	189.8
Haringey	230.3	238.6	247.5	256.4	265.5	273.8
Islington	188.9	205.7	211.5	217.4	223.3	230.7
Lambeth	286.0	298.8	308.6	317.7	326.0	334.0
Lewisham	263.5	271.9	282.4	292.8	303.4	313.6
Newham	259.3	268.1	292.3	315.8	339.7	363.2
Southwark	267.1	286.1	306.2	325.7	345.5	365.3
Tower Hamlets	221.0	249.0	272.7	296.4	319.7	342.5
Wandsworth	282.7	297.5	307.5	316.7	325.0	333.2
Rest of Inner boroughs	2392.3	2526.0	2652.7	2775.5	2897.8	3019.7
Inner London	2981.4	3137.8	3283.6	3423.3	3560.3	3695.9
Barking & Dagenham	169.1	177.4	193.4	208.9	223.6	237.6
Barnet	323.9	326.3	353.1	373.4	394.2	414.5
Bexley	217.9	217.7	219.0	221.1	223.5	225.8
Brent	274.1	279.7	287.8	295.4	302.7	310.1
Bromley	299.4	301.9	304.4	307.4	311.2	315.4
Croydon	334.5	343.3	352.3	361.3	370.4	379.4
Ealing	310.3	317.6	325.2	332.6	340.0	347.4
Enfield	287.9	293.8	297.3	301.0	304.6	308.3
Greenwich	230.5	239.4	264.4	288.4	311.5	334.1
Harrow	216.0	218.7	217.1	215.1	212.7	211.8
Havering	228.2	231.1	241.3	251.6	262.0	272.2
Hillingdon	248.4	261.7	266.5	271.3	276.1	280.1
Hounslow	222.5	237.0	241.9	246.3	250.4	254.0
Kingston upon Thames	152.1	154.9	158.1	161.0	163.5	165.8
Merton	194.8	197.9	198.7	199.4	199.9	200.7
Redbridge	248.2	258.8	265.5	272.2	278.7	285.0
Richmond upon Thames	181.9	186.7	189.8	192.0	193.9	195.3
Sutton	182.7	185.7	185.6	185.8	186.2	186.3
Waltham Forest	223.0	229.2	234.5	239.4	244.2	249.0
Outer London	4545.5	4658.8	4795.9	4923.5	5049.3	5172.8
Greater London	7526.9	7796.6	8079.5	8346.8	8609.6	8868.7
London Plan Inner¹	2981.6	3138.6	3300.4	3455.3	3606.3	3756.2
London Plan Outer	4545.3	4658.0	4779.1	4891.5	5003.3	5112.5

¹ = Inner + Greenwich less Haringey

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

	2006	2011	2016	2021	2026	2031
Camden	95.1	99.2	102.5	105.9	109.2	112.5
Kensington & Chelsea	81.6	83.3	86.3	89.2	92.1	95.0
Westminster	105.6	110.1	114.0	117.8	121.7	125.5
City of London	5.0	5.4	6.0	6.5	7.1	7.6
Central boroughs	287.4	298.1	308.8	319.4	330.1	340.7
Hackney	91.5	98.6	104.4	110.2	116.0	121.8
Hammersmith & Fulham	79.8	82.1	85.2	88.2	91.3	94.4
Haringey	95.9	98.9	103.0	107.1	111.2	115.3
Islington	89.8	100.9	106.7	112.6	118.4	124.3
Lambeth	124.6	131.7	137.9	144.2	150.5	156.8
Lewisham	112.7	116.5	122.1	127.6	133.1	138.6
Newham	98.0	102.6	115.1	127.6	140.1	152.6
Southwark	115.3	123.9	133.9	144.0	154.0	164.0
Tower Hamlets	91.4	107.5	121.9	136.3	150.7	165.2
Wandsworth	125.8	133.0	139.4	145.8	152.2	158.6
Rest of Inner boroughs	1024.8	1095.6	1169.6	1243.6	1317.5	1391.5
Inner London	1312.2	1393.7	1478.3	1563.0	1647.6	1732.2
Barking & Dagenham	70.4	73.8	81.3	88.9	96.4	103.9
Barnet	131.1	135.1	146.3	157.6	168.9	180.2
Bexley	91.3	92.6	94.3	96.0	97.6	99.3
Brent	104.5	108.5	113.8	119.2	124.5	129.8
Bromley	129.6	132.6	135.4	138.2	141.1	143.9
Croydon	143.1	149.8	156.4	163.1	169.7	176.4
Ealing	121.4	125.0	129.5	133.9	138.4	142.8
Enfield	115.9	118.8	121.6	124.4	127.2	130.0
Greenwich	102.1	106.5	119.5	132.5	145.5	158.4
Harrow	83.7	86.9	88.6	90.4	92.1	93.9
Havering	94.5	97.2	103.3	109.5	115.7	121.9
Hillingdon	100.2	106.8	109.9	113.0	116.1	119.2
Hounslow	87.7	93.9	96.3	98.7	101.1	103.4
Kingston upon Thames	64.0	65.4	67.3	69.1	71.0	72.9
Merton	82.4	84.4	86.0	87.6	89.2	90.8
Redbridge	96.2	100.8	104.6	108.4	112.2	116.0
Richmond upon Thames	79.2	80.7	82.0	83.2	84.4	85.6
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
Outer London	1868.4	1936.1	2018.3	2100.6	2182.8	2265.1
Greater London	3180.6	3329.8	3496.7	3663.6	3830.4	3997.3
London Plan Inner¹	1318.4	1401.4	1494.9	1588.4	1681.9	1775.4
London Plan Outer	1862.2	1928.4	2001.8	2075.2	2148.6	2221.9

¹ = Inner + Greenwich less Haringey

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

	2006	2011	2016	2021	2026	2031
Camden	108.0	113.3	117.1	121.0	124.7	128.4
Kensington & Chelsea	89.4	92.4	96.3	99.6	101.7	103.3
Westminster	117.5	123.7	128.3	131.9	133.1	133.5
City of London	5.7	6.2	6.8	7.5	8.0	8.5
Central boroughs	320.7	335.6	348.4	359.9	367.6	373.7
Hackney	103.5	112.6	118.7	124.6	129.7	135.0
Hammersmith & Fulham	99.7	101.7	104.9	107.9	110.1	112.4
Haringey	118.9	123.8	128.4	133.0	137.6	142.1
Islington	101.5	113.3	118.2	122.5	125.9	129.8
Lambeth	160.4	168.4	174.6	180.2	184.2	187.3
Lewisham	141.6	146.7	152.2	157.3	162.7	168.2
Newham	115.8	120.0	132.6	145.4	158.4	171.5
Southwark	138.7	150.3	162.3	173.4	184.0	195.0
Tower Hamlets	104.3	121.1	134.2	146.9	158.0	168.1
Wandsworth	167.9	177.6	183.9	189.6	193.6	196.3
Rest of Inner boroughs	1252.3	1335.5	1409.9	1480.7	1544.2	1605.5
Inner London	1573.0	1671.1	1758.3	1840.6	1911.8	1979.2
Barking & Dagenham	77.6	82.0	90.4	98.3	105.8	112.9
Barnet	164.6	169.1	181.1	192.3	202.1	211.1
Bexley	111.7	112.7	113.5	114.3	115.3	116.5
Brent	137.4	138.5	142.6	146.4	149.0	151.1
Bromley	153.9	156.8	158.6	159.5	160.3	161.2
Croydon	172.8	177.3	181.1	184.8	188.2	192.0
Ealing	161.2	163.9	167.3	170.1	172.3	174.1
Enfield	142.0	144.3	145.3	146.4	147.1	147.9
Greenwich	113.5	117.0	130.5	142.8	154.1	164.5
Harrow	110.1	112.2	112.0	110.9	109.7	109.2
Havering	115.8	120.3	127.0	132.4	136.8	141.4
Hillingdon	128.7	137.7	139.9	141.8	143.6	144.9
Hounslow	117.1	124.4	125.7	126.9	128.2	129.4
Kingston upon Thames	83.5	84.4	85.7	86.8	87.7	88.7
Merton	105.3	105.7	105.3	105.0	104.6	104.0
Redbridge	122.4	128.1	130.8	133.1	135.8	138.6
Richmond upon Thames	100.1	101.5	102.3	102.9	103.4	104.0
Sutton	98.6	100.5	100.1	99.4	99.0	98.3
Waltham Forest	110.6	112.9	115.2	117.1	118.3	119.2
Outer London	2326.8	2389.3	2454.4	2511.2	2561.3	2609.0
Greater London	3899.8	4060.4	4212.8	4351.8	4473.1	4588.2
London Plan Inner¹	1567.6	1664.2	1760.5	1850.5	1928.3	2001.7
London Plan Outer	2332.2	2396.1	2452.3	2501.3	2544.8	2586.6

¹ = Inner + Greenwich less Haringey

Availability of Data

The projections are available in more detail (eg annual age/gender of populations) for registered users on the GLA Demography Extranet or for others on request to demography@london.gov.uk. They are also available on the London Datastore:

<http://data.london.gov.uk/datastore/package/gla-demographic-projections-2008-round-london-plan-borough>

GLA 2009 Round Projections

The 2009 Round of GLA demographic projections will incorporate more up-to-date information on borough level births, deaths and migration as well as the long-term assumptions on fertility and mortality built into the ONS 2008-based projections for England that were published in October 2009 (see *DMAG Update 14-2009*). These will be available in April 2010.