

Update 06-2015

ONS 2014 mid-year population estimates: London analysis

July 2015

Key findings

- London's population grew by 122 thousand between mid-2013 and mid-2014 to reach 8.54 million usual residents. The GLA estimates this to be the highest single year increase in Greater London's history.
- Annual births fell for a second consecutive year, falling from 131 thousand to 128 thousand.
- International inflows to London rose to 200 thousand from 170 thousand the previous year driven largely by in-migration from Europe. This follows two years of lower international inflows.
- Net internal outflows from London increased to 68 thousand from 55 thousand the year before indicating a possible return to patterns seen prior to the financial crisis.
- Natural change accounted for 82 thousand of the overall population growth and migration for 39 thousand.

Introduction

On 25th June 2015, the Office for National Statistics (ONS) released their 2014 mid-year population estimates (MYE). This Intelligence Unit *Update* examines the results for London, comparing with results from recent rounds of ONS projections and the GLA's own 2013 and 2014-round projections.

Note on projections

This Update considers three sets of population projections:

- ONS 2012-based sub-national population projections (SNPP);
- GLA 2013 round trend-based (central variant) population projections – these are included for comparison purposes as they underpin the Further Alterations to the London Plan; and
- GLA 2014 round trend-based (short-term migration scenario) population projections.

For simplicity, these projections will be referred to as 2012 SNPP; GLA 2013 round; and GLA 2014 round.

Note on accuracy

When interpreting these results, the reader should be aware of the levels of accuracy of different aspects of the data. Data is released by ONS and replicated here at unit-level; however, this precision should not be mistaken for a declaration of accuracy to that level. Estimates of birth and death data are generally accurate and users can expect the estimates to closely represent actual occurrences. However, estimates of population numbers and migration flows are acknowledged to have historically deviated significantly from actuals and it is normal for multiple revisions to these data to take place over the years as improved evidence becomes available.

Note on conventions

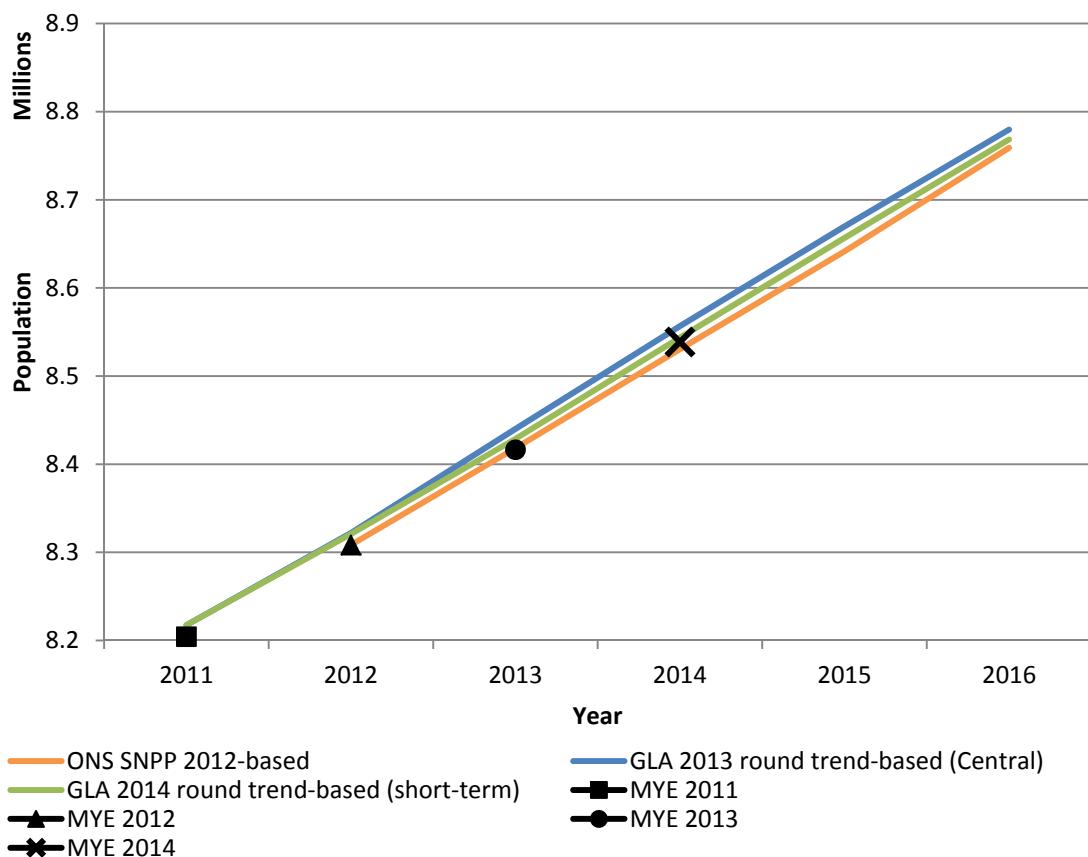
Birth, death and migration data referred to throughout this report are always for periods between consecutive mid-years. However, to simplify the narrative, the data for, e.g., mid-2013 to mid-2014 will be referred to as 2014.

Total population

Figure 1 shows London’s projected and estimated population. London’s population continued to grow strongly over the year, with the 2014 mid-year estimates giving a total population of 8,538,689; up over 122 thousand from the previous year. This estimated population was between that projected by current ONS and GLA projections.

The GLA’s 2014 round trend-based projection came closest to the estimate with a projected 2014 population of 8,543,587; nearly five thousand higher than the MYE 2014 figure. The most recent, 2012-based, ONS SNPP projected a 2014 population of 8,530,483; just over eight thousand lower than the MYE 2014 estimate. The 2013 round GLA trend-based projections, starting from a modified 2011 base, gave the highest total population (8,556,566), nearly 18 thousand higher than the 2014 MYE figure.

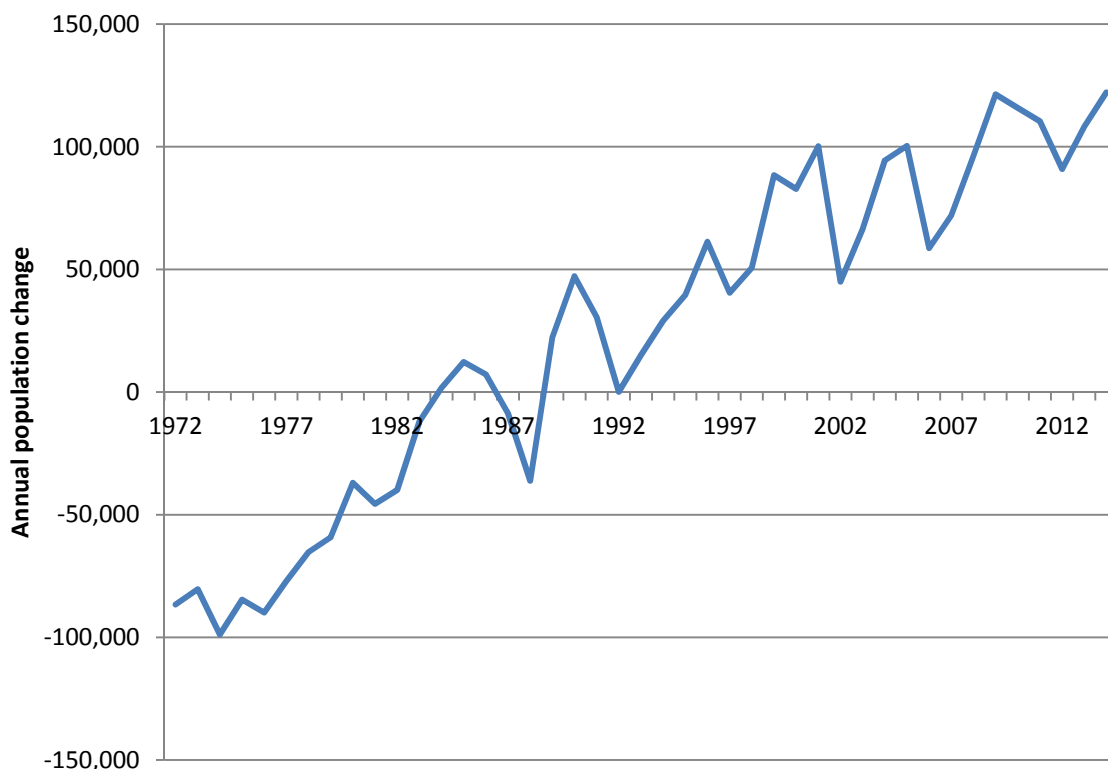
Figure 1: Total population, London, 2011-2016



Source: GLA 2014 round trend-based population projections (short-term migration scenario); GLA 2013 round trend-based population projections (Central variant); ONS 2012-based subnational population projections; ONS 2011 to 2014 mid-year estimates

The growth of London’s population by over 122 thousand between mid-2013 and mid-2014 is the largest single year increase - based on ONS mid-year estimates with the exception of the period 2002-2010 when GLA population estimates have been used.

Figure 2: Population change, London, 1972-2014



Source: ONS mid-year estimates (1971-2001 and 2011-present); GLA population estimates (2002-2010)

Population by local authority

Table 1 compares the 2013 and 2014 MYE populations for each London local authority with results from several sets of projections: the GLA’s 2013 and 2014 trend-based projections and the 2012-based SNPP.

The table shows that between 2013 and 2014, London’s population grew by over 122 thousand to reach 8.54 million. This is in line with the last few rounds of GLA projections as well as the most recent subnational projections from ONS.

This growth was split roughly equally between Inner and Outer London; 49.3 per cent and 50.7 per cent respectively. At individual borough level, Tower Hamlets saw the absolute largest growth with an increase of over 11 thousand (or 4.1 per cent). Westminster and Newham both saw their population grow by over six thousand. In percentage terms, City of London had the largest increase of 5.5 per cent followed by Tower Hamlets with 4.1 per cent.

Two boroughs are estimated to have experienced a minor decrease in their population between 2013 and 2014 - Ealing and Hammersmith & Fulham; a decline of 0.2 and 0.1 per cent respectively.

Table 1: Total population, local authority, 2013 and 2014

	MYE 2013	2014 population			
		MYE 2014	GLA 2013 round trend-based (central)	GLA 2014 round trend-based (short-term)	ONS SNPP 2012
Camden	229,719	234,846	231,534	233,694	231,468
Kensington & Chelsea	155,594	156,190	155,604	155,740	155,594
Westminster	226,841	233,292	229,150	230,958	229,875
City of London	7,648	8,072	8,043	7,947	8,086
Central	619,802	632,400	624,331	628,339	625,024
Hackney	257,379	263,150	260,663	261,540	259,294
Hammersmith & Fulham	178,685	178,365	181,931	180,370	179,807
Haringey	263,386	267,541	266,476	267,622	266,069
Islington	215,667	221,030	220,116	220,393	219,686
Lambeth	314,242	318,216	317,861	318,084	317,738
Lewisham	286,180	291,933	289,921	290,458	289,794
Newham	318,227	324,322	330,553	326,309	325,103
Southwark	298,464	302,538	302,678	302,941	302,290
Tower Hamlets	272,890	284,015	277,915	280,474	276,402
Wandsworth	310,516	312,145	314,996	314,700	314,025
Rest of Inner	2,715,636	2,763,255	2,763,111	2,762,890	2,750,207
Inner	3,335,438	3,395,655	3,387,442	3,391,230	3,375,231
Barking & Dagenham	194,352	198,294	199,990	198,909	198,409
Barnet	369,088	374,915	376,009	374,978	375,815
Bexley	236,687	239,865	238,506	238,732	238,446
Brent	317,264	320,762	324,758	321,737	319,794
Bromley	317,899	321,278	320,057	321,456	320,460
Croydon	372,752	376,040	377,154	376,749	376,740
Ealing	342,494	342,118	348,713	346,280	347,635
Enfield	320,524	324,574	327,271	324,836	326,728
Greenwich	264,008	268,678	265,940	266,912	265,995
Harrow	243,372	246,011	248,788	246,869	247,910
Havering	242,080	245,974	244,991	244,729	244,431
Hillingdon	286,806	292,690	292,434	292,072	291,095
Hounslow	262,407	265,568	268,875	267,390	267,803
Kingston upon Thames	166,793	169,958	168,719	168,903	169,697
Merton	203,223	203,515	208,027	206,135	207,588
Redbridge	288,272	293,055	294,849	292,910	295,094
Richmond upon Thames	191,365	193,585	193,329	193,849	194,039
Sutton	195,914	198,134	198,875	198,716	198,816
Waltham Forest	265,797	268,020	271,842	270,198	268,759
Outer	5,081,097	5,143,034	5,169,125	5,152,357	5,155,252
Total	8,416,535	8,538,689	8,556,566	8,543,587	8,530,483

Source: GLA 2014 round trend-based population projections (short-term migration scenario); GLA 2013 round trend-based population projections (Central variant); ONS 2012-based subnational population projections; ONS 2013 and 2014 mid-year estimates

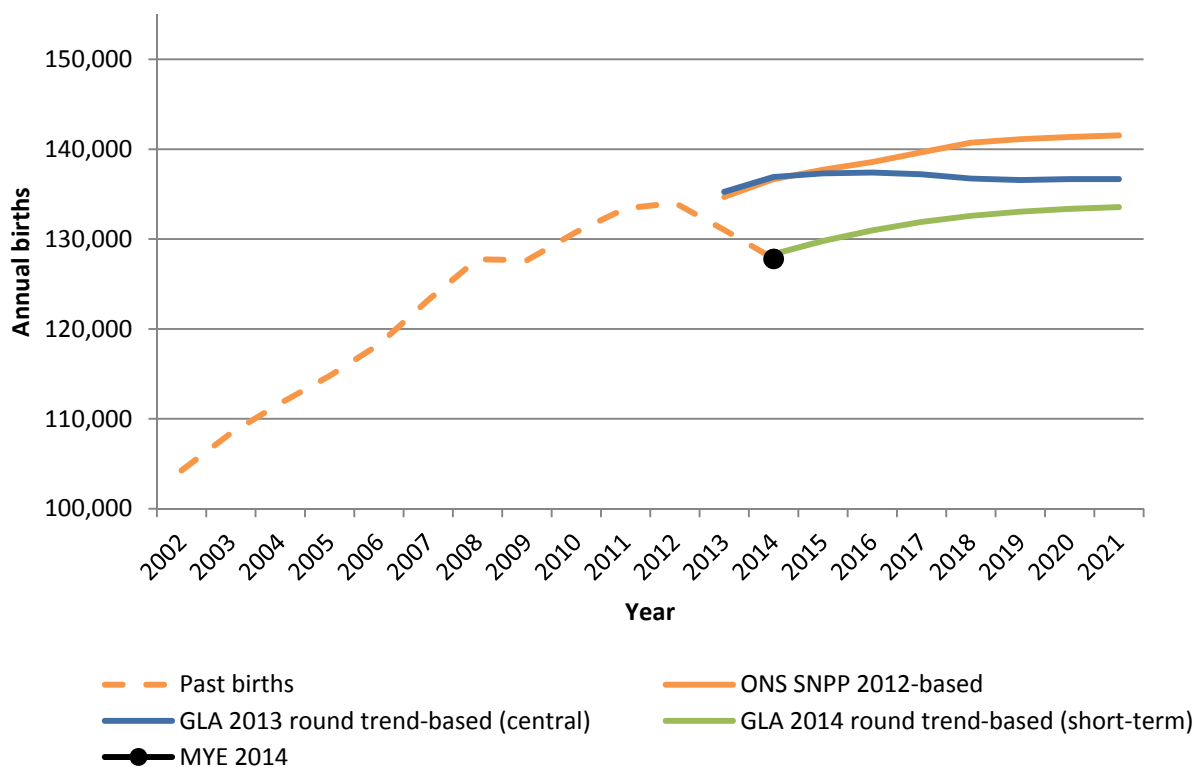
Births, deaths and natural change

Births

Figure 2 shows estimated and projected births in London. Births in London fell for the second consecutive year. The 2014 estimate of 128 thousand births over the year is over three thousand lower than the previous year and over six thousand lower than the peak recorded in the year to mid-2012.

It was not yet clear from last year's fall in births as to whether this was the start of a new trend of stable or falling births. However, this further fall gives weight to the view that the trend of rising births and fertility rates seen in London over the last decade may be ending.

Figure 3: Births, London, 2002-2021



Source: GLA 2014 round trend-based population projections (short-term migration scenario); GLA 2013 round trend-based population projections (Central variant); ONS 2012-based subnational population projections; ONS 2013 and 2014 mid-year estimates

Table 2 shows birth estimates by local authority for 2013 and 2014, as well as projected births for 2014 from GLA and ONS projections. 28 of the 33 authorities saw a reduction in births from the previous year, with the biggest falls occurring in Tower Hamlets (-285), Westminster (-258), Southwark (-245) and Ealing (-225). Of the four boroughs that saw their number of births rise, three had increases of less than 50 with only Havering seeing a higher number of births (+162).

Table 2: Births, local authority, 2013 and 2014

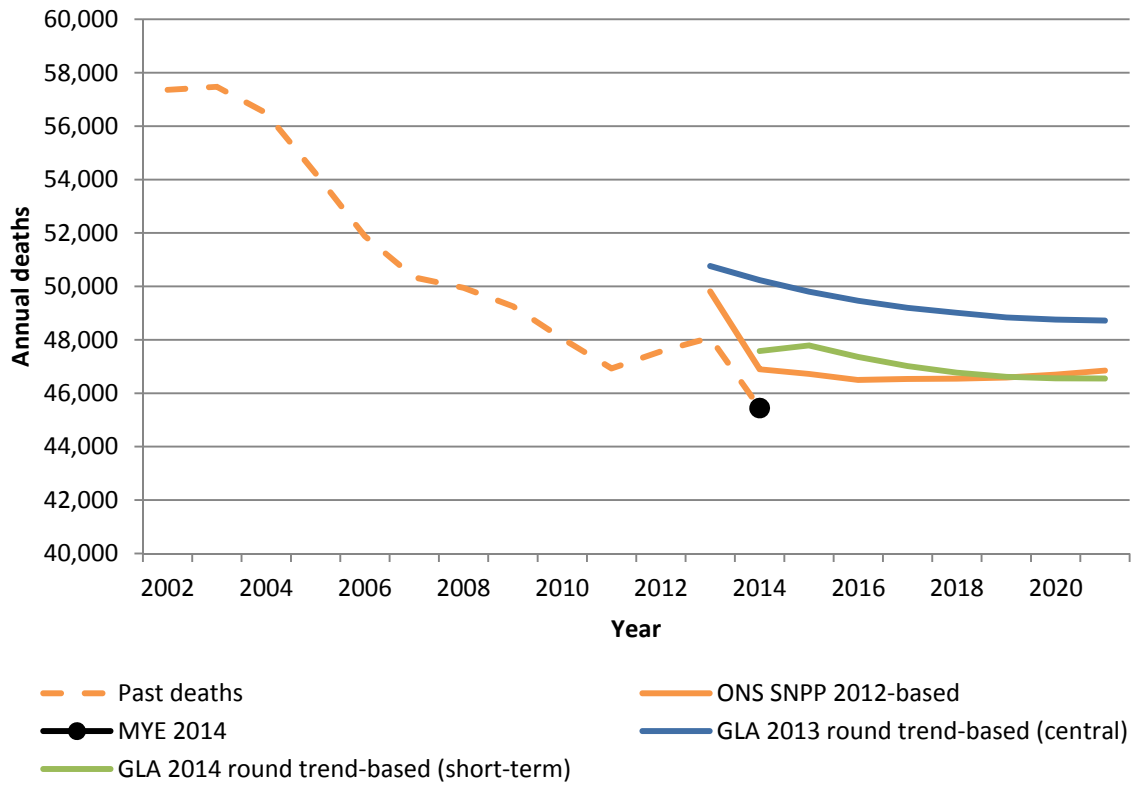
	2013	2014			
	MYE 2013	MYE 2014	GLA 2013 round trend-based (Central)	GLA 2014 round trend-based (short-term)	ONS SNPP 2012
Camden	2,861	2,679	3,020	2,766	3,201
Kensington & Chelsea	1,909	1,820	1,942	1,803	2,113
Westminster	2,832	2,574	3,000	2,677	3,064
City of London	71	68	54	82	90
Central	7,673	7,141	8,015	7,328	8,467
Hackney	4,507	4,372	4,538	4,418	4,789
Hammersmith & Fulham	2,599	2,494	2,633	2,552	2,720
Haringey	4,150	4,091	4,249	4,141	4,351
Islington	2,945	2,841	3,044	2,819	3,200
Lambeth	4,645	4,571	4,879	4,589	5,159
Lewisham	4,951	4,753	5,134	4,827	5,098
Newham	6,260	6,285	6,772	6,267	6,631
Southwark	4,908	4,663	5,167	4,706	5,342
Tower Hamlets	4,805	4,520	4,951	4,608	4,962
Wandsworth	5,269	5,206	5,541	5,152	5,791
Rest of Inner	45,039	43,796	46,908	44,079	48,043
Inner	52,712	50,937	54,924	51,407	56,510
Barking & Dagenham	3,866	3,699	4,038	3,796	3,847
Barnet	5,286	5,275	5,766	5,187	5,645
Bexley	2,972	3,019	3,190	2,959	3,169
Brent	5,170	5,160	5,468	5,170	5,245
Bromley	3,981	4,002	4,156	3,899	4,175
Croydon	5,747	5,648	6,035	5,605	5,639
Ealing	5,687	5,462	5,829	5,395	5,703
Enfield	4,966	4,876	5,167	4,908	5,163
Greenwich	4,564	4,405	4,648	4,442	4,707
Harrow	3,620	3,574	3,673	3,559	3,513
Havering	2,926	3,088	3,020	3,004	2,952
Hillingdon	4,390	4,369	4,697	4,330	4,528
Hounslow	4,512	4,344	4,781	4,443	4,552
Kingston upon Thames	2,213	2,169	2,348	2,112	2,396
Merton	3,474	3,308	3,502	3,370	3,568
Redbridge	4,706	4,592	4,999	4,591	4,753
Richmond upon Thames	2,826	2,698	2,898	2,805	2,957
Sutton	2,639	2,642	2,805	2,629	2,798
Waltham Forest	4,754	4,540	4,972	4,721	4,850
Outer	78,299	76,870	81,992	76,925	80,162
Total	131,011	127,807	136,915	128,332	136,672

Source: GLA 2014 round trend-based population projections (short-term migration scenario); GLA 2013 round trend-based population projections (Central variant); ONS 2012-based subnational population projections; ONS 2013 and 2014 mid-year estimates

Deaths

Figure 3 shows estimated and projected annual deaths in London. The 2014 MYE showed a considerable fall in deaths, almost 11 thousand fewer deaths per year than at the start of the last decade. This follows a rise in deaths the previous year.

Figure 4: Deaths, London 2002-2021

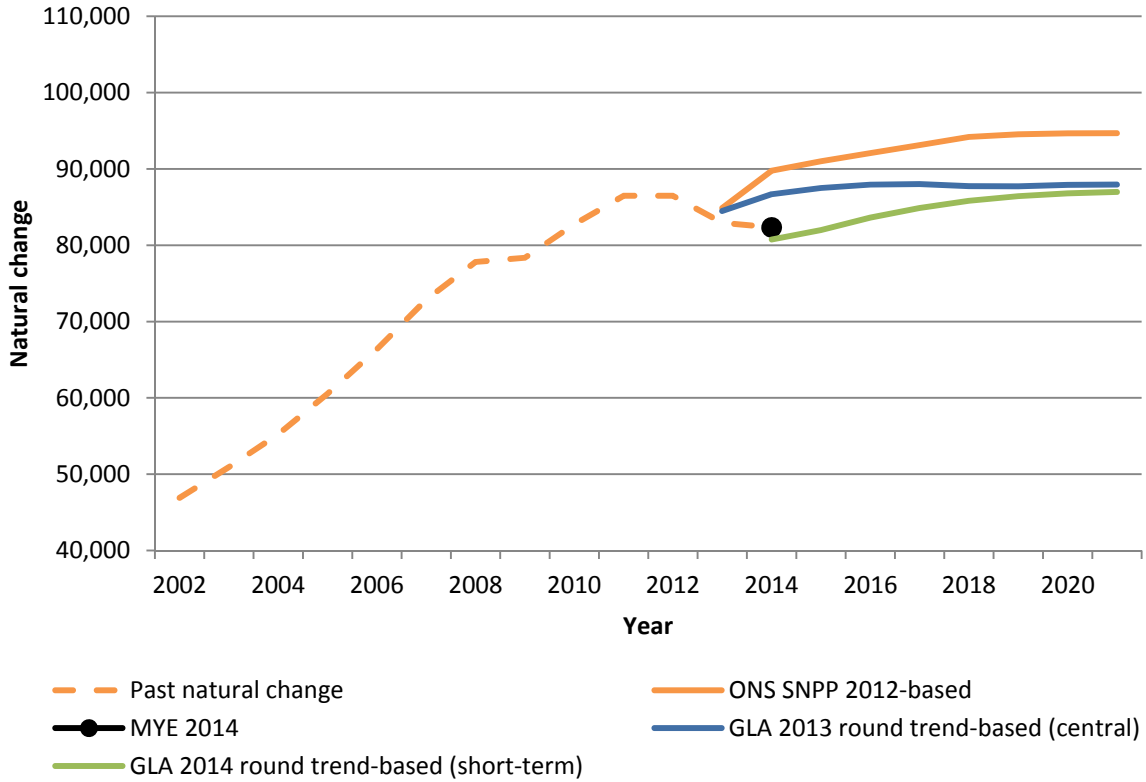


Source: GLA 2014 round trend-based population projections (short-term migration scenario); GLA 2013 round trend-based population projections (Central variant); ONS 2012-based subnational population projections; ONS 2013 and 2014 mid-year estimates

Natural change

Natural change, the difference between births and deaths, fell by 575 in London to just over 82 thousand. This is the third consecutive year in which natural change has fallen – a result of recent falls in births being larger than corresponding falls in deaths.

Figure 5: Natural change, London, 2002-2021



Source: GLA 2014 round trend-based population projections (short-term migration scenario); GLA 2013 round trend-based population projections (Central variant); ONS 2012-based subnational population projections; ONS 2013 and 2014 mid-year estimates

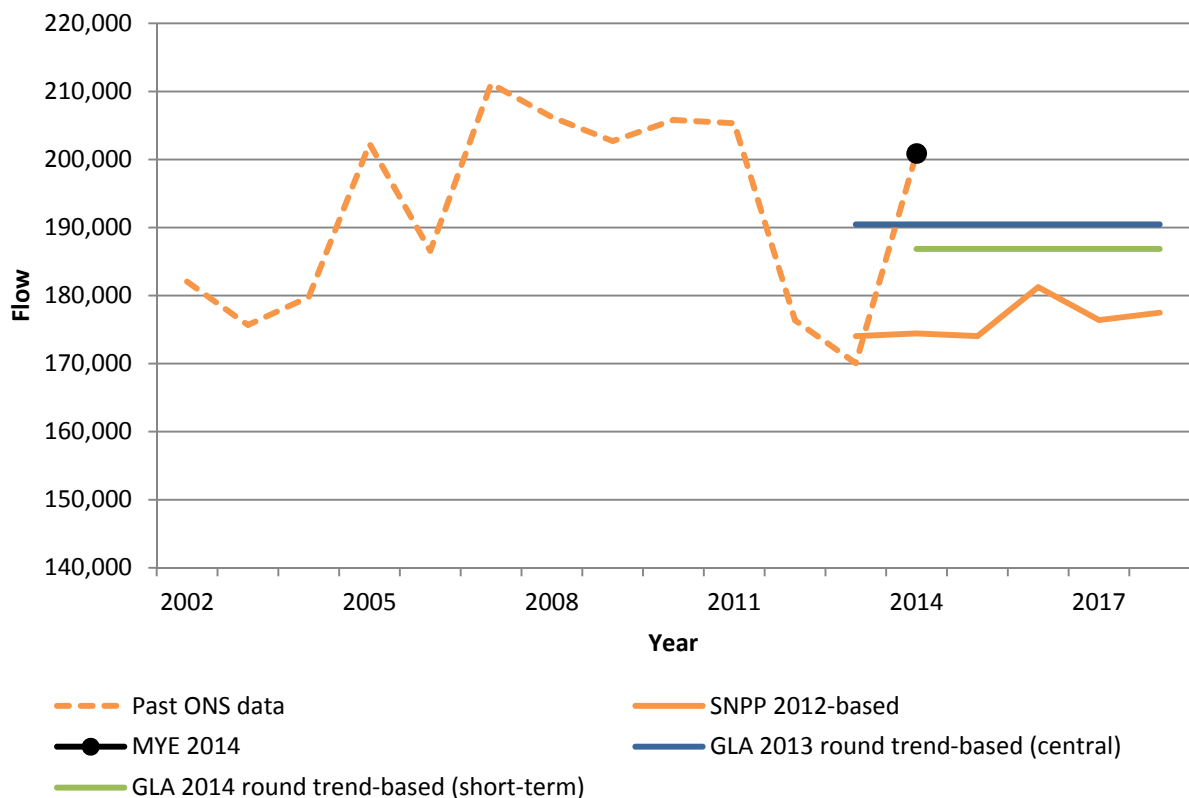
Migration

International migration

International inflows rose considerably after two years of lower estimates – up to 200 thousand from 170 thousand the year before. This rise is largely driven by increased migration from Europe, with rises from all groups of nations, but particularly from Romania and Bulgaria following the end to temporary work restrictions at the beginning of 2014.

International outflows (Figure 6) also rose in 2014 – a modest increase of nearly three thousand – although they continue to remain below the levels seen in the latter half of the last decade.

Figure 6: International in-migration flows, London, 2002-2018



Source: GLA 2014 round trend-based population projections (short-term migration scenario); GLA 2013 round trend-based population projections (Central variant); ONS 2012-based subnational population projections; ONS 2013 and 2014 mid-year estimates

Figure 7: International out-migration flows, London, 2002-2018

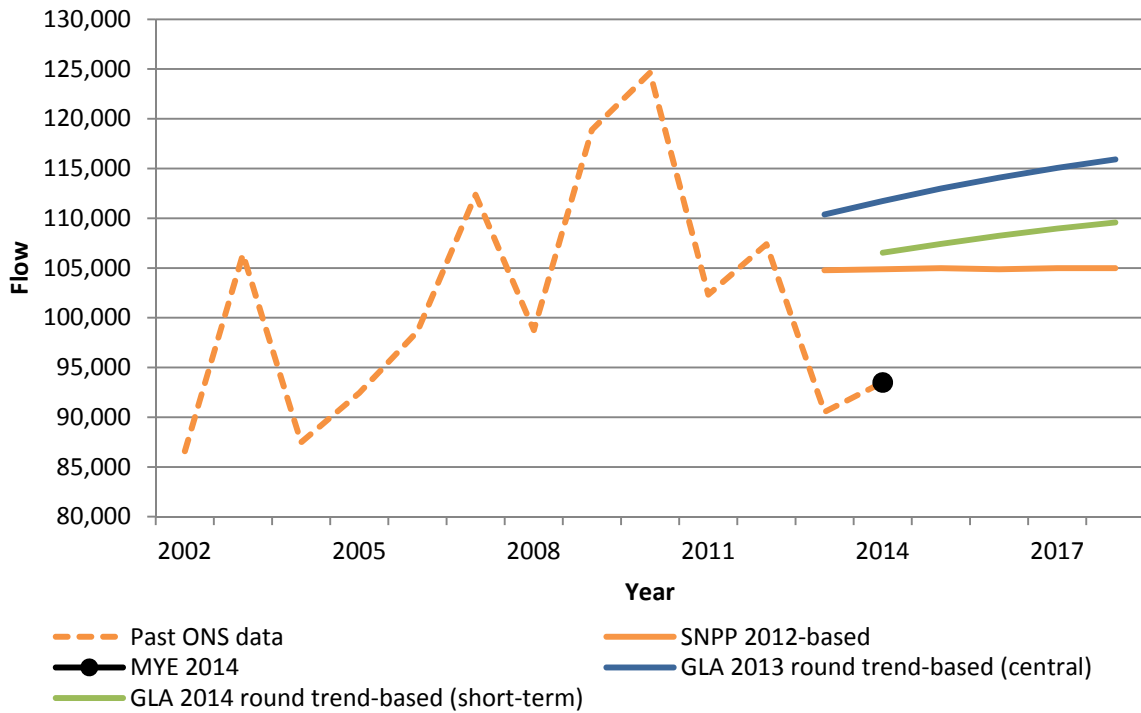
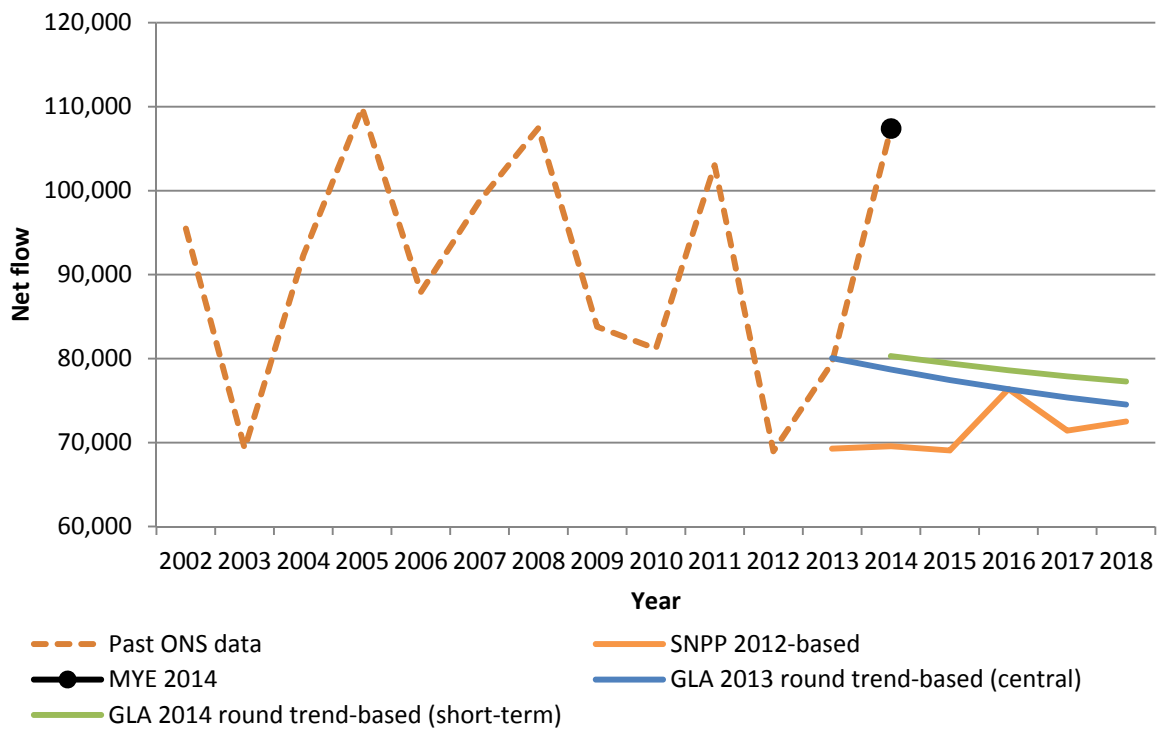


Figure 8: International net migration flows, London, 2002-2018



Source: GLA 2014 round trend-based population projections (short-term migration scenario); GLA 2013 round trend-based population projections (Central variant); ONS 2012-based subnational population projections; ONS 2013 and 2014 mid-year estimates

Net international migration (Figure 7) rose by nearly eight thousand to over 107 thousand in 2014. This results from the large increase in international inflows over the past year.

Table 3 shows net international migration estimates by local authority for 2013 and 2014, as well as projected net flows for 2014 from GLA and ONS projections. Net international inflow into London as a whole rose by nearly 28 thousand to around 107 thousand. 57.7 per cent of this increase occurred in Outer London boroughs with 42.3 per cent in the Inner London boroughs.

Brent saw the largest rise in net international inflows between the two years; up 2,696 or 67.0 per cent. This was followed by Newham, Harrow and Camden, where net international inflows rose in each by more than 1,500.

Three boroughs however experienced a fall in their net international inflow. Lambeth saw the biggest drop (-622) alongside Wandsworth (-343) and Ealing (-92).

Table 3: Net international migration, local authority, 2013 and 2014

	2013	2014			
	MYE 2013	MYE 2014	GLA 2013 round trend-based (central)	GLA 2014 round trend-based (short-term)	ONS SNPP 2012
Camden	4,744	6,288	4,062	4,706	3,480
Kensington & Chelsea	-170	1,059	-307	-417	-815
Westminster	7,546	8,886	3,103	4,719	2,461
City of London	193	252	-33	177	218
Central	12,313	16,485	6,826	9,185	5,344
Hackney	2,021	2,592	1,497	1,302	1,118
Hammersmith & Fulham	41	1,277	-334	-133	-1,500
Haringey	4,860	5,559	4,309	4,108	3,759
Islington	3,848	4,620	3,547	3,896	3,163
Lambeth	3,267	2,645	1,981	2,225	1,946
Lewisham	2,407	3,234	2,150	2,023	2,061
Newham	7,151	9,518	10,842	10,360	9,774
Southwark	3,541	4,210	4,171	3,864	3,607
Tower Hamlets	7,013	8,467	4,162	4,567	4,256
Wandsworth	102	-241	-484	-376	-1,087
Rest of Inner	34,251	41,881	31,841	31,836	27,095
Inner	46,564	58,366	38,667	41,021	32,439
Barking & Dagenham	1,403	2,543	2,207	2,114	1,948
Barnet	3,912	4,770	3,533	3,735	3,433
Bexley	516	699	722	719	681
Brent	4,021	6,717	5,465	4,862	4,295
Bromley	348	728	522	530	506
Croydon	1,141	2,189	1,652	1,509	1,715
Ealing	2,383	2,291	2,843	2,928	2,568
Enfield	1,933	2,983	2,768	2,546	2,555
Greenwich	1,818	2,793	2,361	2,275	2,310
Harrow	1,153	3,030	2,209	2,172	2,056
Havering	271	673	409	431	374
Hillingdon	2,833	3,970	2,838	2,957	2,604
Hounslow	2,994	3,607	3,591	3,602	3,557
Kingston upon Thames	1,827	2,136	1,912	1,998	1,935
Merton	177	540	1,103	739	999
Redbridge	2,049	3,403	2,008	2,088	2,426
Richmond upon Thames	139	426	-53	99	-141
Sutton	330	465	292	346	307
Waltham Forest	3,706	5,075	3,657	3,634	2,986
Outer	32,954	49,038	40,040	39,283	37,115
Total	79,518	107,404	78,707	80,304	69,554

Source: GLA 2014 round trend-based population projections (short-term migration scenario); GLA 2013 round trend-based population projections (Central variant); ONS 2012-based subnational population projections; ONS 2013 and 2014 mid-year estimates

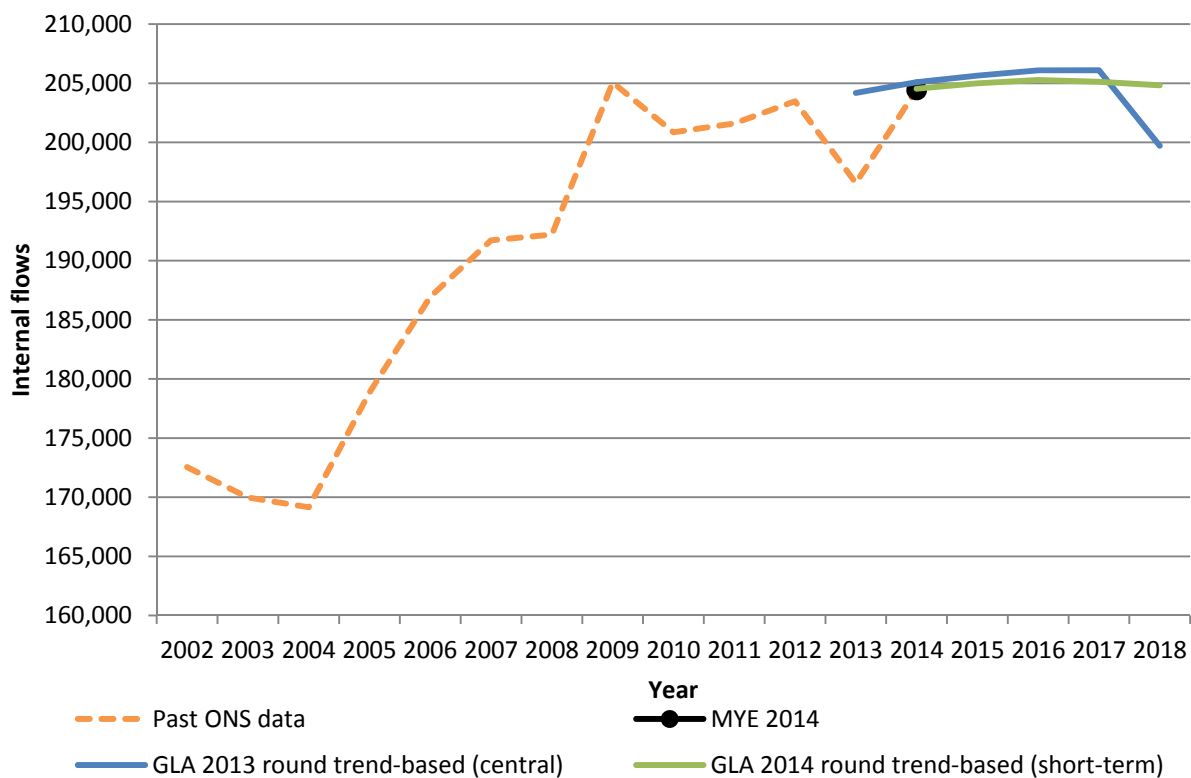
Internal migration

Net internal outflows from London to the rest of the UK increased to 68 thousand up from 55 thousand a year before. In the years prior to 2008’s financial crisis, annual net outflows had typically been over 75 thousand. These fell sharply in the aftermath of the crisis, dropping to just 32 thousand in the year to mid-2009.

Outflows have been slowly recovering since then, but this latest data (a rise in outflows from 252 thousand to 273 thousand) indicates a big step back towards the patterns of migration we saw before the crisis. This data helps validate the methodology used for the GLA’s 2013 round projections to support the FALP (Further Alterations to the London Plan) which assumed that an increase in outflows would take place as the economy and housing markets recovered.

Internal inflows to London have also risen in 2014; up nearly eight thousand to 204 thousand – their highest level over the period since 2002.

Figure 9: Internal in-migration flows, London, 2002-2018



Source: GLA 2014 round trend-based population projections (short-term migration scenario); GLA 2013 round trend-based population projections (Central variant); ONS 2013 and 2014 mid-year estimates

Figure 10: Internal out-migration flows, London, 2002-2018

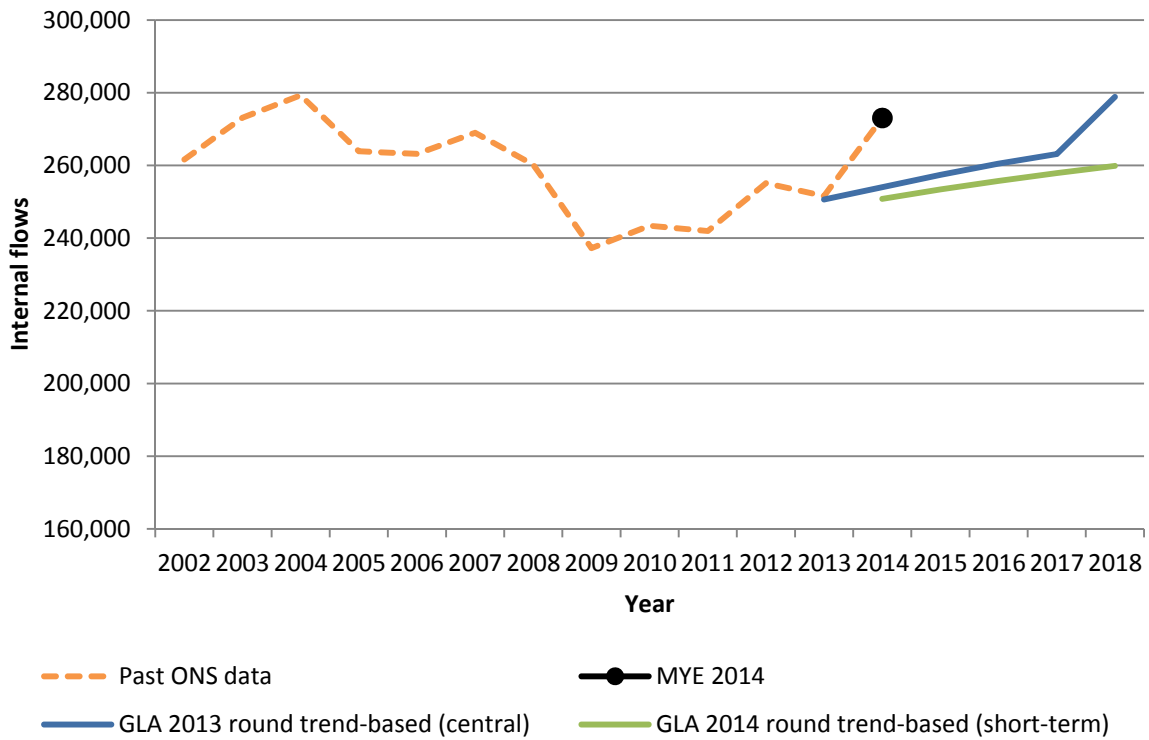
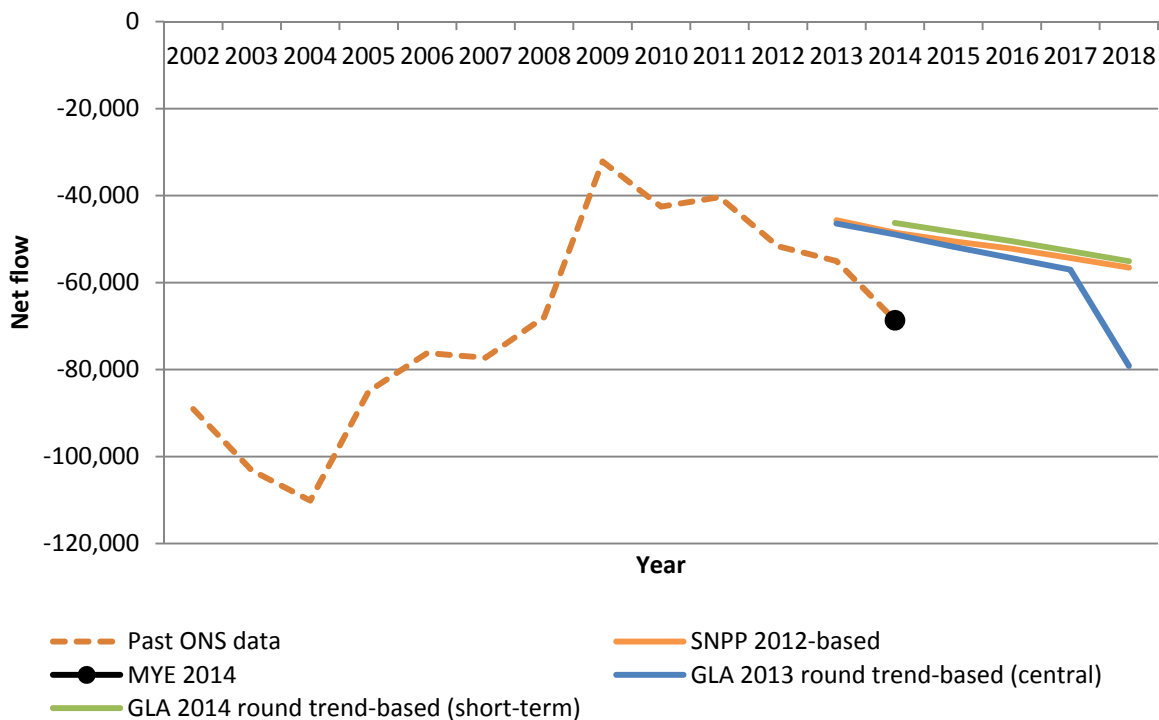


Figure 11: Net internal migration, London, 2002-2016



Source: GLA 2014 round trend-based population projections (short-term migration scenario); GLA 2013 round trend-based population projections (Central variant); ONS 2012-based subnational population projections; ONS 2013 and 2014 mid-year estimates

Table 4: Net internal migration, local authority, 2013 and 2014

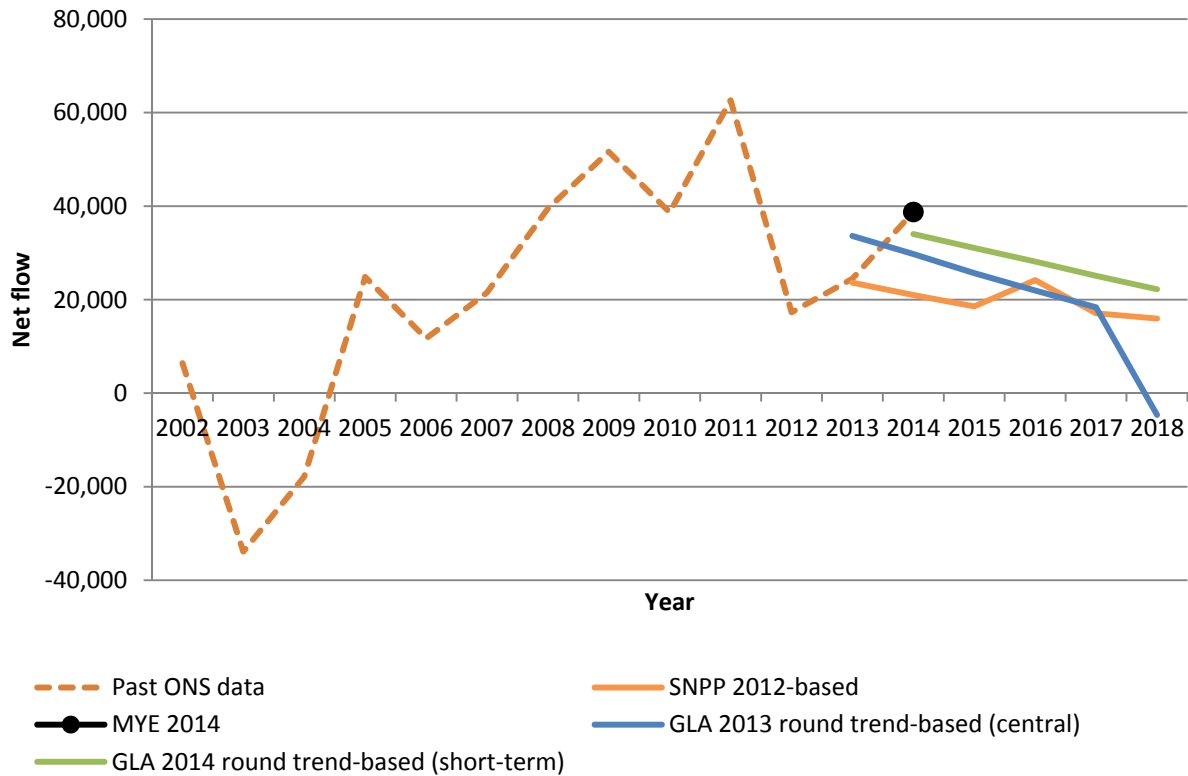
	2013		2014		
	MYE 2013	MYE 2014	GLA 2013 round trend-based (central)	GLA 2014 round trend-based (short-term)	ONS SNPP 2012
Camden	-1736	-2790	-2740	-2354	-2573
Kensington & Chelsea	-1276	-1580	-896	-859	-650
Westminster	-6338	-4000	-2412	-2184	-1692
City of London	-193	138	70	55	-25
Central	-9,543	-8,232	-5,978	-5,342	-4,940
Hackney	-239	-226	-883	-904	-1364
Hammersmith & Fulham	-2943	-3248	-460	-218	-463
Haringey	-3492	-4412	-3942	-3815	-3434
Islington	-1126	-1067	-1259	-1156	-1345
Lambeth	-2733	-1908	-1330	-1417	-2296
Lewisham	-1195	-787	-1710	-1676	-1457
Newham	-8007	-8534	-9087	-8714	-9600
Southwark	-2253	-3538	-3643	-3405	-3381
Tower Hamlets	-932	-875	-1231	-1259	-1787
Wandsworth	-1624	-2143	-329	36	-575
Rest of Inner	-24,544	-26,738	-23,873	-22,526	-25,702
Inner	-34,087	-34,970	-29,851	-27,868	-30,642
Barking & Dagenham	-258	-1118	-513	-519	-561
Barnet	-1732	-1884	-762	-722	-805
Bexley	845	1273	8	76	220
Brent	-4922	-6932	-4708	-4774	-5399
Bromley	2046	1169	718	1092	1210
Croydon	-624	-2362	-1086	-830	-865
Ealing	-4404	-6391	-2836	-3014	-2880
Enfield	-1676	-1892	-1024	-1193	-965
Greenwich	-871	-1262	-2174	-1884	-2424
Harrow	-2352	-2606	-1442	-1358	-1256
Havering	1470	2244	1302	1137	1367
Hillingdon	-297	-800	-743	-877	-610
Hounslow	-2752	-3678	-2232	-1987	-2324
Kingston upon Thames	-53	-188	-860	-896	-425
Merton	-1459	-2365	-770	-609	-713
Redbridge	-1313	-1622	-179	-354	-78
Richmond upon Thames	496	208	346	623	777
Sutton	756	594	831	894	1020
Waltham Forest	-3840	-6052	-2972	-3224	-3194
Outer	-20,940	-33,664	-19,097	-18,417	-17,905
Total	-55,027	-68,634	-48,948	-46,285	-48,547

Source: GLA 2014 round trend-based population projections (short-term migration scenario); GLA 2013 round trend-based population projections (Central variant); ONS 2012-based subnational population projections; ONS 2013 and 2014 mid-year estimates

Total net migration and churn

Total net migration (the sum of net international and net internal migration) continued to increase in 2014 to reach nearly 39 thousand, yet remains below the high seen in 2011 of over 60 thousand. This was driven by the large rise in net international migration.

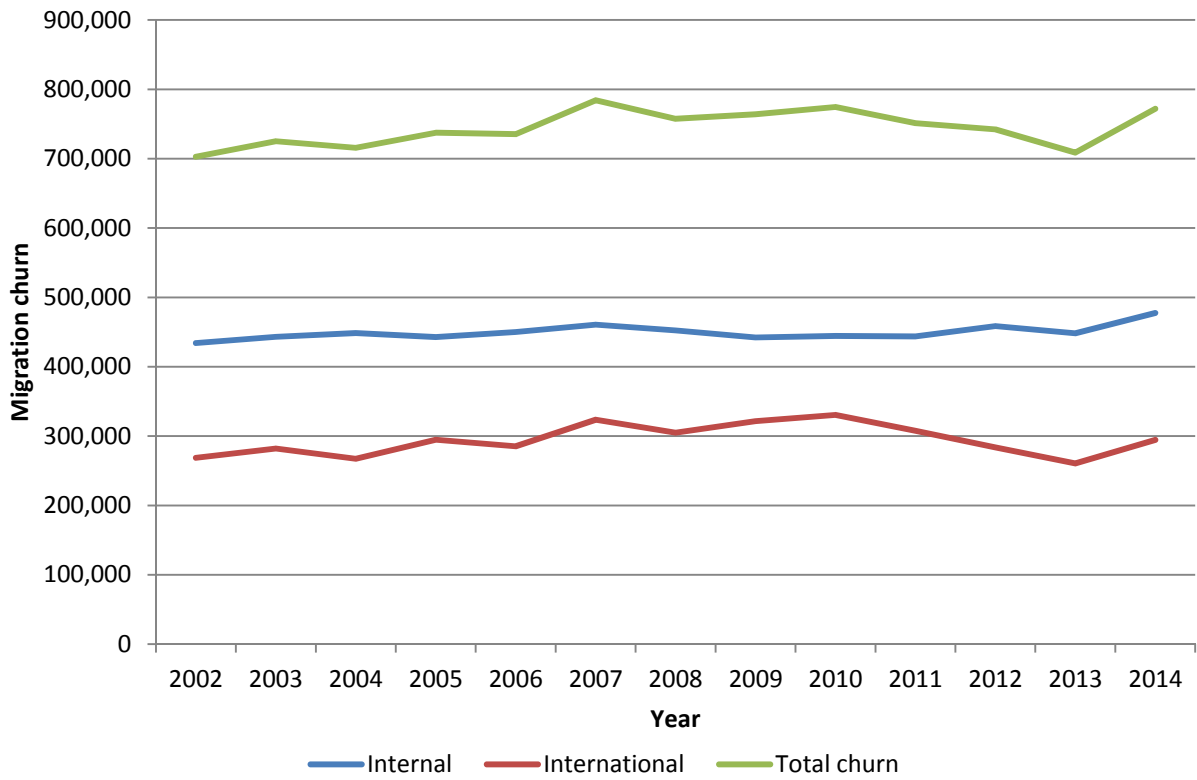
Figure 12: Total net migration, London, 2002-2018



Source: GLA 2014 round trend-based population projections (short-term migration scenario); GLA 2013 round trend-based population projections (Central variant); ONS 2012-based subnational population projections; ONS 2013 and 2014 mid-year estimates

Figure 12 shows total migration churn (the sum of in and out gross flows). Both international and internal churn rose in 2014 after declining the previous year. Internal churn reached its highest level over the period since 2002 to over 477 thousand. International churn rose by nearly 34 thousand to around 294 thousand. Total churn as a result also went up.

Figure 13: Migration churn, London, 2002-2014



Source: ONS 2013 and 2014 mid-year estimates, ONS internal migration estimates

Glossary

Central London

Consists of four authorities: Camden, Kensington & Chelsea, Westminster, and the City of London.

Rest of Inner London

Consists of ten authorities: Hackney, Hammersmith & Fulham, Haringey, Islington, Lambeth, Lewisham, Newham, Southwark, Tower Hamlets and Wandsworth.

Inner London

Consists of the 14 authorities which make up of Central London and the Rest of Inner London.

Outer London

Consists of 19 authorities: Barking & Dagenham, Barnet, Bexley, Brent, Bromley, Croydon, Ealing, Enfield, Greenwich, Harrow, Havering, Hillingdon, Hounslow, Kingston upon Thames, Merton, Redbridge, Richmond upon Thames, Sutton, and Waltham Forest.