

Demographic Projections for the draft 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 the Mayor published his draft London Plan, along with his draft Transport and Economic Development strategies. The draft documents (see link below) are open for public comment to 12 January 2010.

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

The Mayor is undertaking a full review of the London Plan but until this process is complete, probably in late 2011, the current version ('the London Plan Consolidated with Alterations since 2004' which was published in February 2008) remains in force.

This *Update* presents the demographic projections, covering population, households and resident labour force that were prepared in Summer 2009 to support the Plan and strategies.

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 three ways:

- in the base period from 2001 to 2007 the London population follows the total change seen in the ONS mid-year estimates,
- for the period after 2011 new housing development was estimated by the 2009 Strategic Housing Land Availability Assessment (SHLAA) that replaced the 2004 London Housing Capacity Study, and
- population was linked to households by the marital status rates and household representative rates as projected in the CLG 2006-based household projections that were published in March 2009 (see *DMAG Update 04-2009*).

The projections were prepared for London as a whole with an indicative breakdown to boroughs based on local trends in average household size. The distribution of boroughs into Inner London and Outer London is that adopted for the London Plan, rather than the NUTS 2 distribution more commonly used for demographic statistics.

Housing Provision

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. Full details will be published shortly in the 2009 Strategic Housing Land Availability Assessment and Housing Capacity Study report of studies. 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

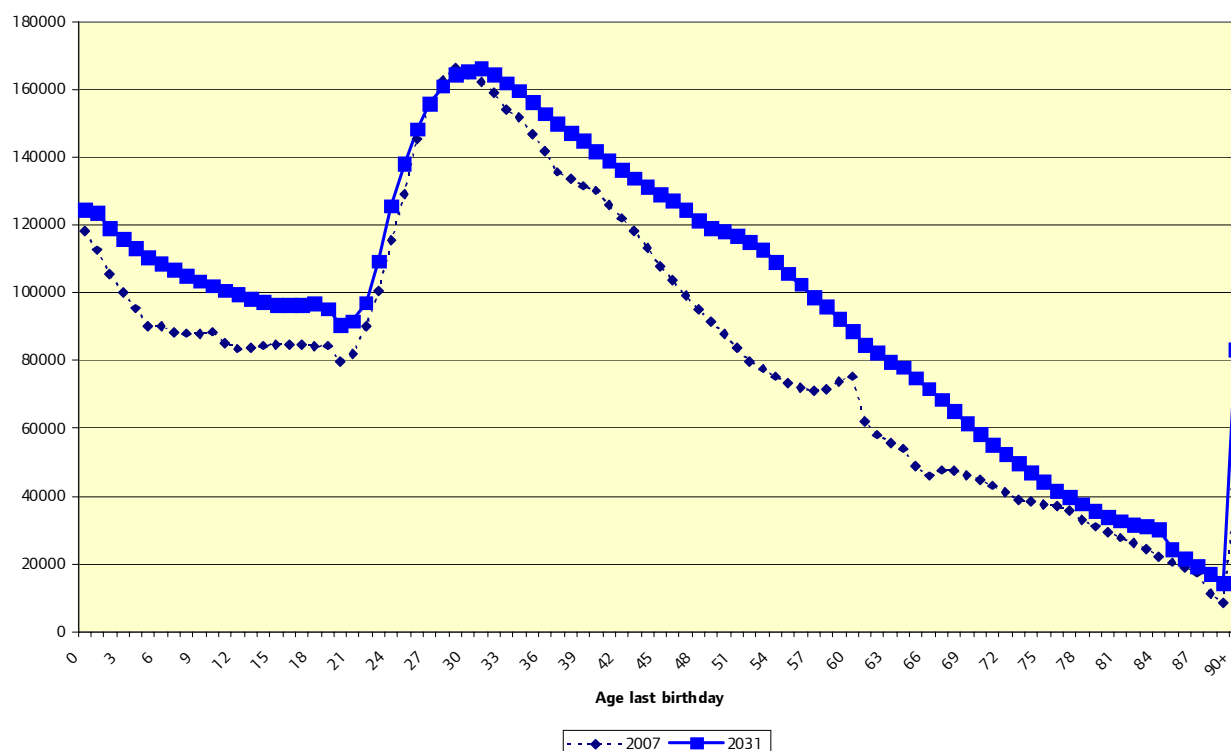
Table 2: Population and Household Projection for Greater London, (thousands, except average household size)

	2006	2011	2016	2021	2026	2031
Married Couple Households	1038.5	964.5	909.6	869.6	840.3	834.4
Cohabiting Couple Households	333.0	399.0	454.9	503.6	549.2	587.9
Lone Parent Households	317.0	344.6	370.6	389.4	403.1	415.3
Other (2+ Adult) Households	342.9	360.0	380.1	400.1	420.6	440.7
One-person Households	1149.6	1255.7	1375.5	1494.9	1611.4	1713.1
Total Households	3181.0	3323.8	3490.7	3657.6	3824.5	3991.4
Private Household Population	7434.0	7719.1	8007.8	8278.9	8539.5	8788.0
Average Household Size	2.337	2.322	2.294	2.263	2.233	2.202
Total Population	7526.9	7812.1	8100.7	8372.3	8634.8	8886.1
Communal Population	92.9	93.0	93.0	93.5	95.2	98.1

Between 2006 and 2031 London's population is projected to increase by 1.36 million persons, equivalent to over 18 per cent. Households are expected to increase by 810 thousand, or 25 per cent. The difference in the rates of change is mainly due to the 6 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 rise in one-person households that accounts for 70 per cent of the total growth. Married couples are the only household type projected to decline, with the loss being more than compensated by the increase in cohabiting couples.

Chart 1: Age Structure 2007 and 2031, Greater London



The growth in population is seen at all age groups and demonstrates both a distinct ageing pattern, particularly with an increase of over 530 thousand persons between ages 45 and 64 as well as a significant increase in the child population, with nearly 200 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 32 per cent, or nearly 280 thousand, to reach 1.14 million by 2031. The over 90s are expected to nearly double in number to 83 thousand.

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

	2006	2011	2016	2021	2026	2031
Males	2124.6	2185.0	2240.8	2293.1	2349.4	2400.9
Females	1786.9	1885.9	1987.2	2077.7	2140.8	2197.8
Persons	3911.5	4070.9	4228.0	4370.7	4490.3	4598.7

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. The result is a 687 thousand increase in the resident labour force aged 16-74, equivalent to 18 per cent. The female contribution to the labour force rises by 411 thousand and is 60 per cent of the total growth.

Annex: Indicative Borough Results

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

	2006	2011	2016	2021	2026	2031
City of London	8.8	9.4	10.2	11.0	11.7	12.5
Camden	203.4	207.2	211.5	215.5	219.3	222.9
Greenwich	230.5	246.7	272.2	296.7	320.4	343.4
Hackney	217.7	229.1	239.6	249.6	259.3	268.6
Hammersmith & Fulham	175.8	181.3	185.7	189.8	193.7	197.4
Islington	188.9	206.4	216.0	225.2	234.0	242.5
Kensington & Chelsea	166.4	171.5	175.1	178.5	181.7	184.7
Lambeth	286.0	294.1	304.5	314.2	323.6	332.5
Lewisham	263.5	269.8	279.0	287.6	296.0	303.9
Newham	259.3	291.6	320.2	347.8	374.5	400.2
Southwark	267.1	280.8	299.9	318.1	335.8	352.8
Tower Hamlets	221.0	252.2	283.1	312.9	341.8	369.8
Wandsworth	282.7	290.1	300.4	310.2	319.5	328.5
Westminster, City of	210.4	214.9	219.6	224.0	228.2	232.2
Inner London	2981.6	3145.0	3317.1	3480.9	3639.4	3792.0
Barking & Dagenham	169.1	176.1	191.6	206.5	220.9	234.8
Barnet	323.9	334.6	357.6	379.6	400.9	421.4
Bexley	217.9	218.9	220.1	220.9	221.7	222.4
Brent	274.1	286.3	296.3	305.7	314.7	323.4
Bromley	299.4	303.6	306.1	308.2	310.2	312.0
Croydon	334.5	345.6	356.4	366.5	376.3	385.6
Ealing	310.3	320.4	327.5	334.0	340.2	346.1
Enfield	287.9	291.8	294.9	297.6	300.1	302.4
Haringey	230.3	239.1	245.7	251.9	257.9	263.5
Harrow	216.0	224.1	225.7	227.1	228.3	229.4
Havering	228.2	233.1	244.7	255.8	266.5	276.8
Hillingdon	248.4	253.8	258.1	262.0	265.7	269.2
Hounslow	222.5	233.7	236.6	239.2	241.6	243.8
Kingston upon Thames	152.1	154.4	156.8	158.9	160.9	162.9
Merton	194.8	198.9	200.1	200.9	201.7	202.4
Redbridge	248.2	255.3	261.6	267.5	273.1	278.5
Richmond upon Thames	181.9	183.8	184.2	184.3	184.5	184.5
Sutton	182.7	185.4	185.4	185.2	185.0	184.7
Waltham Forest	223.0	228.1	234.1	239.7	245.1	250.3
Outer London	4545.3	4667.1	4783.6	4891.5	4995.4	5094.1
Greater London	7526.9	7812.1	8100.7	8372.3	8634.8	8886.1

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

	2006	2011	2016	2021	2026	2031
City of London	5.0	5.4	5.9	6.5	7.0	7.6
Camden	95.2	97.6	101.0	104.3	107.6	110.9
Greenwich	102.3	110.3	123.2	136.2	149.2	162.2
Hackney	91.6	97.1	102.9	108.7	114.5	120.3
Hammersmith & Fulham	78.7	81.8	84.8	87.9	91.0	94.0
Islington	88.4	97.2	103.1	109.0	114.8	120.7
Kensington & Chelsea	81.7	84.8	87.7	90.7	93.6	96.5
Lambeth	124.9	129.3	135.6	141.9	148.2	154.4
Lewisham	112.8	116.3	121.8	127.3	132.8	138.4
Newham	98.2	111.2	123.7	136.2	148.7	161.2
Southwark	115.9	122.7	132.7	142.7	152.8	162.8
Tower Hamlets	91.6	105.2	119.6	134.0	148.5	162.9
Wandsworth	126.2	130.4	136.8	143.2	149.5	155.9
Westminster, City of	105.8	108.8	112.6	116.5	120.3	124.2
Inner London	1318.1	1398.0	1491.4	1584.9	1678.4	1771.9
Barking & Dagenham	70.4	73.9	81.4	89.0	96.5	104.1
Barnet	131.3	136.6	147.9	159.1	170.4	181.7
Bexley	91.2	92.3	94.0	95.7	97.4	99.0
Brent	104.9	110.4	115.7	121.0	126.4	131.7
Bromley	129.7	132.5	135.3	138.1	141.0	143.8
Croydon	143.3	149.1	155.7	162.4	169.0	175.7
Ealing	121.5	126.3	130.8	135.2	139.7	144.1
Enfield	115.8	118.2	121.0	123.8	126.6	129.4
Haringey	95.5	99.8	103.9	108.0	112.1	116.3
Harrow	82.7	86.4	88.2	89.9	91.7	93.5
Havering	94.5	97.2	103.4	109.5	115.7	121.9
Hillingdon	100.3	103.2	106.4	109.5	112.6	115.7
Hounslow	87.8	92.9	95.3	97.7	100.0	102.4
Kingston upon Thames	64.1	65.5	67.4	69.3	71.1	73.0
Merton	82.5	84.9	86.5	88.1	89.7	91.3
Redbridge	96.3	99.7	103.5	107.3	111.1	114.9
Richmond upon Thames	79.2	80.6	81.8	83.0	84.2	85.5
Sutton	78.9	80.6	81.6	82.7	83.8	84.8
Waltham Forest	92.8	95.6	99.4	103.2	107.0	110.8
Outer London	1862.9	1925.8	1999.3	2072.7	2146.1	2219.5
Greater London	3181.0	3323.8	3490.7	3657.6	3824.5	3991.4

The borough projections exist in no more detail than is shown in the Annex tables. However more detailed London results are available on request.

The 2009 round of GLA demographic projections will build on these projections and have fully developed borough results. They will also 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 are due to be published later in October.