

# Further Alterations to the London Plan

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# Background

- **A sequence of improving projections based on updated inputs over 5 years**
- **2006 BSPS Conference presentation**
  - **Getting the 'present' right**
  - **Critical of ONS estimates at borough and London levels**
- **Concentrating on the overall London situation**
- **Building on revised ONS estimates**
- **Anticipating ONS/CLG revised projections**

# 2003 EiP

- Based upon original ONS mid-2001 population estimate – **7.19 million (3.06 million households)**
- No 2001 Census data on migration age structures or household representative rates
- Assumed constant average household size since 1996
- 1999 London Housing Capacity Study
- 2016 - **7.90 million (3.47 million households)**

# Additional Data: 2003-06

- Updated ONS mid-2001 estimate – **7.32 million**
- 2001 Census migration structures by age/gender
- Borough age-specific fertility rates for 2000-02
- Borough group age-specific survival rates for 2000-02
- Annual births and deaths to mid-2005
- London Development Database (LDD) 2001-06
- 2004 London Housing Capacity Study (LHCS), including amendments for 2017-27 (2006)
- CLG 2003-based household projections – for communal establishment population, marital status and household representative rates – **3.04 million households at 2001**

# GAD, ONS and CLG Projections

- GAD 2003-based national population – November 2004
- ONS 2003-based subnational population – August 2005
- **GAD 2004-based national population – November 2005**
- **CLG 2003-based subnational households – March 2006**
- ONS 2004-based subnational population – August 2006

**Too late for 2007 EiP:**

- **CLG 2004-based subnational households – March 2007**

# Bone Wells Central

- In January 2006 GLA worked with consultants Bone Wells to assess risks in the basic assumptions used for the *London Plan*
- Three **migration-led** projections based on:
  - ONS 2001-05 MYE
  - **GAD 2004-based national** fertility, mortality & variant migration assumptions
  - London retaining its 1999-2004 shares of UK inflows and outflows
- **BWC results for London:**
  - 2006      7.57 m
  - 2016      8.19 m
  - 2026      8.71 m
- **ONS 2004-based projection for London emerged seven months later - and was tolerably similar**

# RLP Low - 1

- In early 2006 GLA obtained detailed output for London boroughs from **CLG 2003-based household projections** and there was pressure from GOL to use them in the *Review of the London Plan*
- At borough level GLA used:
  - Numbers (below age 75) & Proportions (75+) of **total population resident in communal establishments** by gender/5YA
  - Proportions of PH population (gender/5YA) by **marital status** (married/widowed/divorced/single)
  - Proportions of PH population (gender/5YA/marital status) **representing households by type** (married couples, cohabiting couples, lone parents, one-person, other) or non-representatives
- Linked this data with GLA migration-led Bone Wells High/Central/Low population projections and LDD/LHCS data on annual additional homes 2001-2027



# RLP Low - 2

- Created borough population projections that were consistent with recent migration patterns, known and expected housing development and changing likelihoods of individuals to form households
- A **capacity-led** projection linked to LDD/LHCS was created:
- **London:**
  - 2006            7.47 m pop            3.15 m hholds    2.34 ahs
  - 2016            7.94 m pop            3.46 m hholds    2.26 ahs
  - 2026            8.26 m pop            3.70 m hholds    2.21 ahs
  - **2006-26    +0.79 m pop            +0.55 m hholds or 27.3 k/year**

# RLP High

- Bone Wells Central was adopted as the high projection for the *London Plan* work and became RLP High
- Borough populations in RLP Low were grossed up (by age/gender) to match the earlier BWC projection for London as a whole and the results converted to households:
- London:

– 2006	7.57 m pop	3.20 m hholds	2.34 ahs
– 2016	8.19 m pop	3.58 m hholds	2.26 ahs
– 2026	8.71 m pop	3.92 m hholds	2.20 ahs
– 2006-26	+1.14 m pop	+0.72 m hholds	or 36.0 k/year

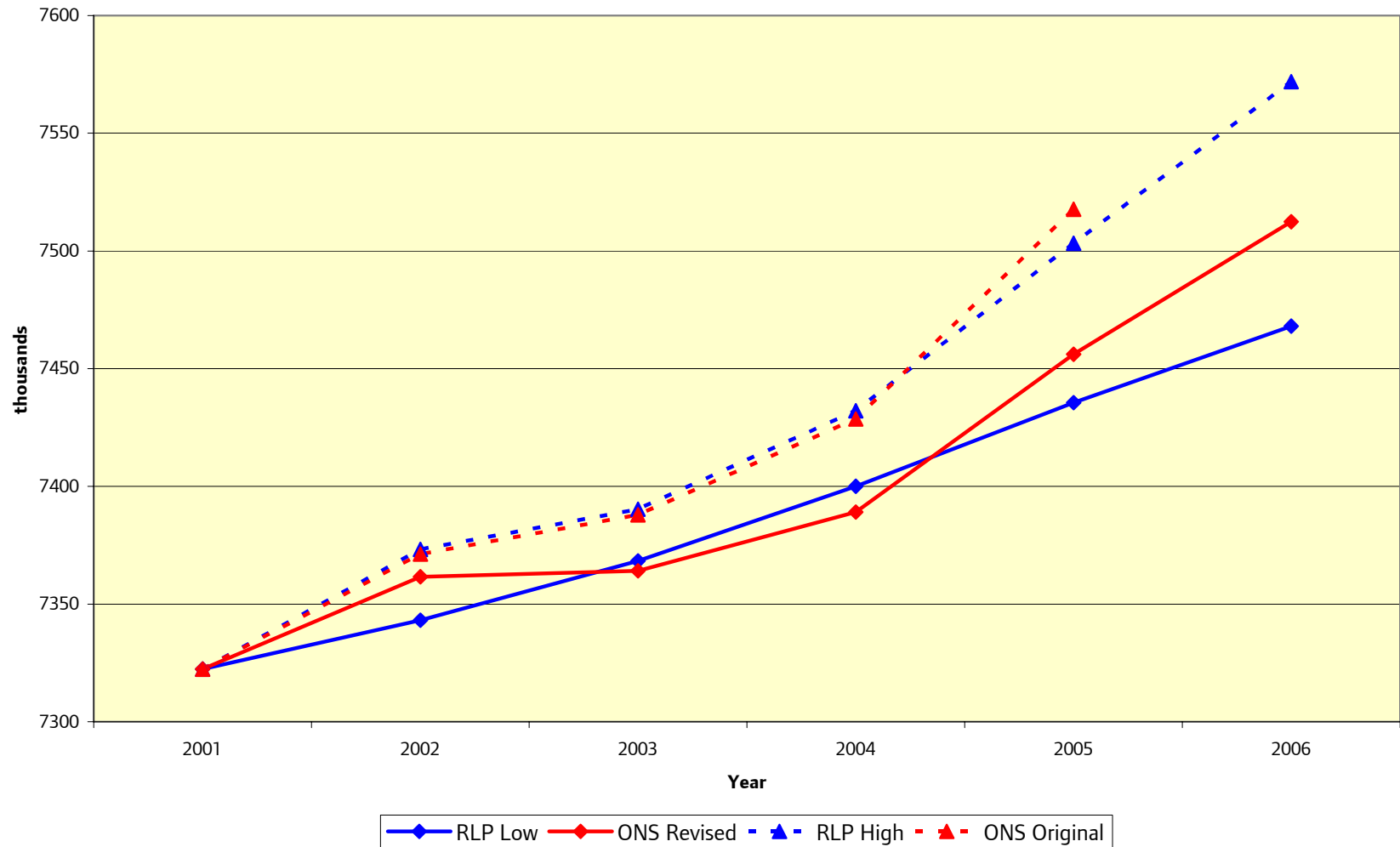
# Comparisons with ONS/CLG 2004-based projections

- **London:**
  - 2006            7.59 m pop            3.20 m hholds    2.34 ahs
  - 2016            8.16 m pop            3.60 m hholds    2.24 ahs
  - 2026            8.68 m pop            3.99 m hholds    2.16 ahs
  - **2006-26    +1.09 m pop            +0.78 m hholds or 39.0 k/year**
- **Main differences with RLP High:**
  - **More households and lower average household size in CLG projection**
- **Why?**
  - **Age and gender structure differences between GLA and ONS population projections**
  - **Mainly the ONS 'loss' of female population from London**

# ONS Amendments to International Migration Methodology

- In April 2007 ONS announced results of research that alters international inflow and outflow data used to calculate mid-year estimates.
- GLA presented preliminary findings to EiP Technical Seminar in May.
- The ONS changes were finalised in August.
- Impacts 2001-04:
  - England +17.6k
  - London -39.5k
- Impacts 2001-05:
  - England +34.0k
  - London -61.7k
- London's MYE 2001-06 have moved closer to RLP Low (capacity based) figures: 7.52 m at mid-2006
- Updated RLP Low figures: 7.49 m at mid-2006

# London Estimates: 2001-06



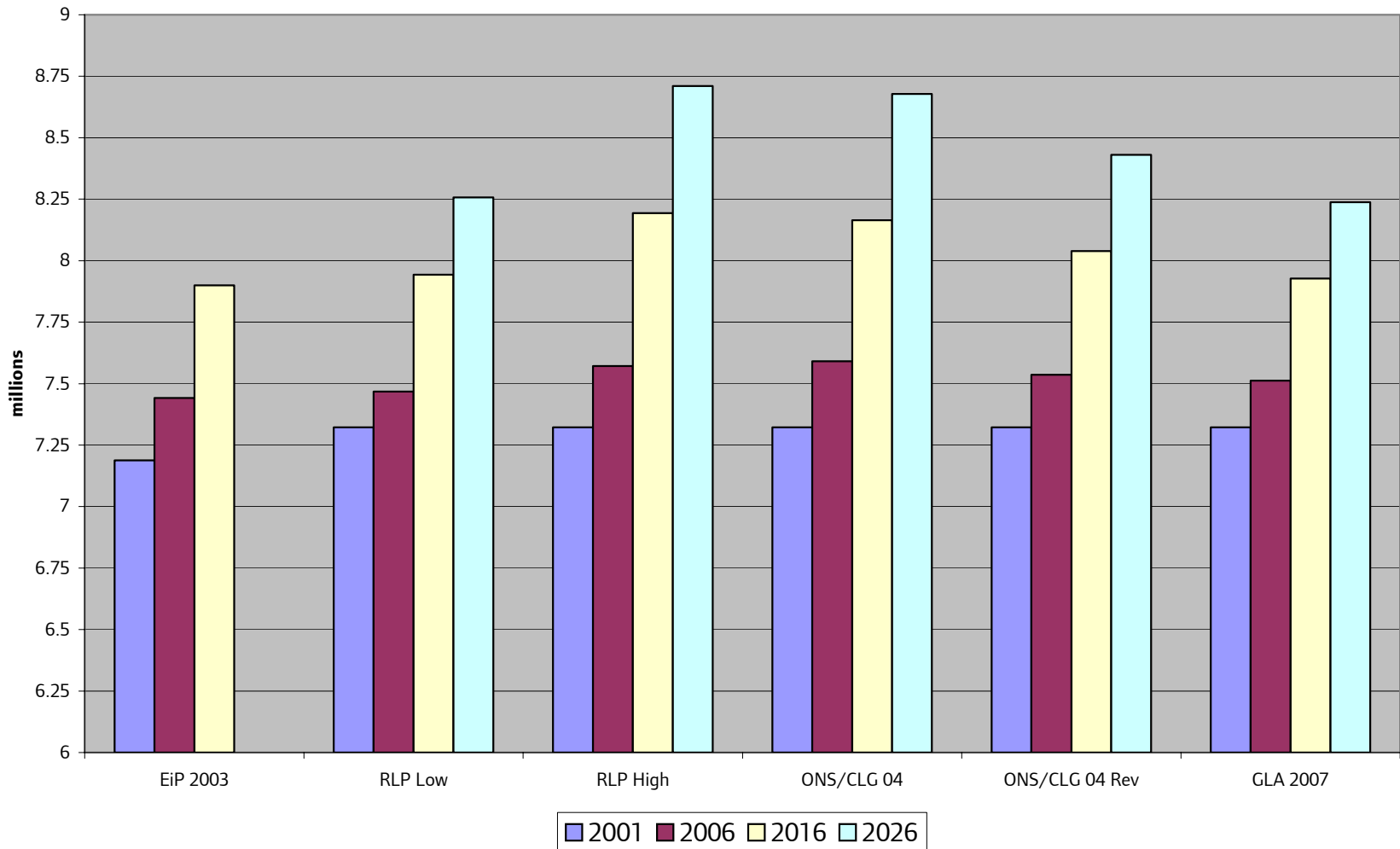
# Future ONS/CLG projections?

- ONS is revising mid-2004 based subnational projections (27 September 2007) and CLG will convert to households (March 2008)
- ONS using international migration 1999-2001 (original) and 2001-04 (revised)
- Possible impact for London:
  - 2004 base lower by 39.5k @ 7.39 m
  - Average migration (1999-04) lower by  $(39.5/5 =) 7.9$  k/year
  - 2006            7.54 m pop            3.18 m hholds    2.34 ahs
  - 2016            8.04 m pop            3.55 m hholds    2.24 ahs
  - 2026            8.43 m pop            3.86 m hholds    2.16 ahs
  - **2006-26    +0.89 m pop            +0.68 m hholds or 33.8 k/year**

# Using all new ONS Data

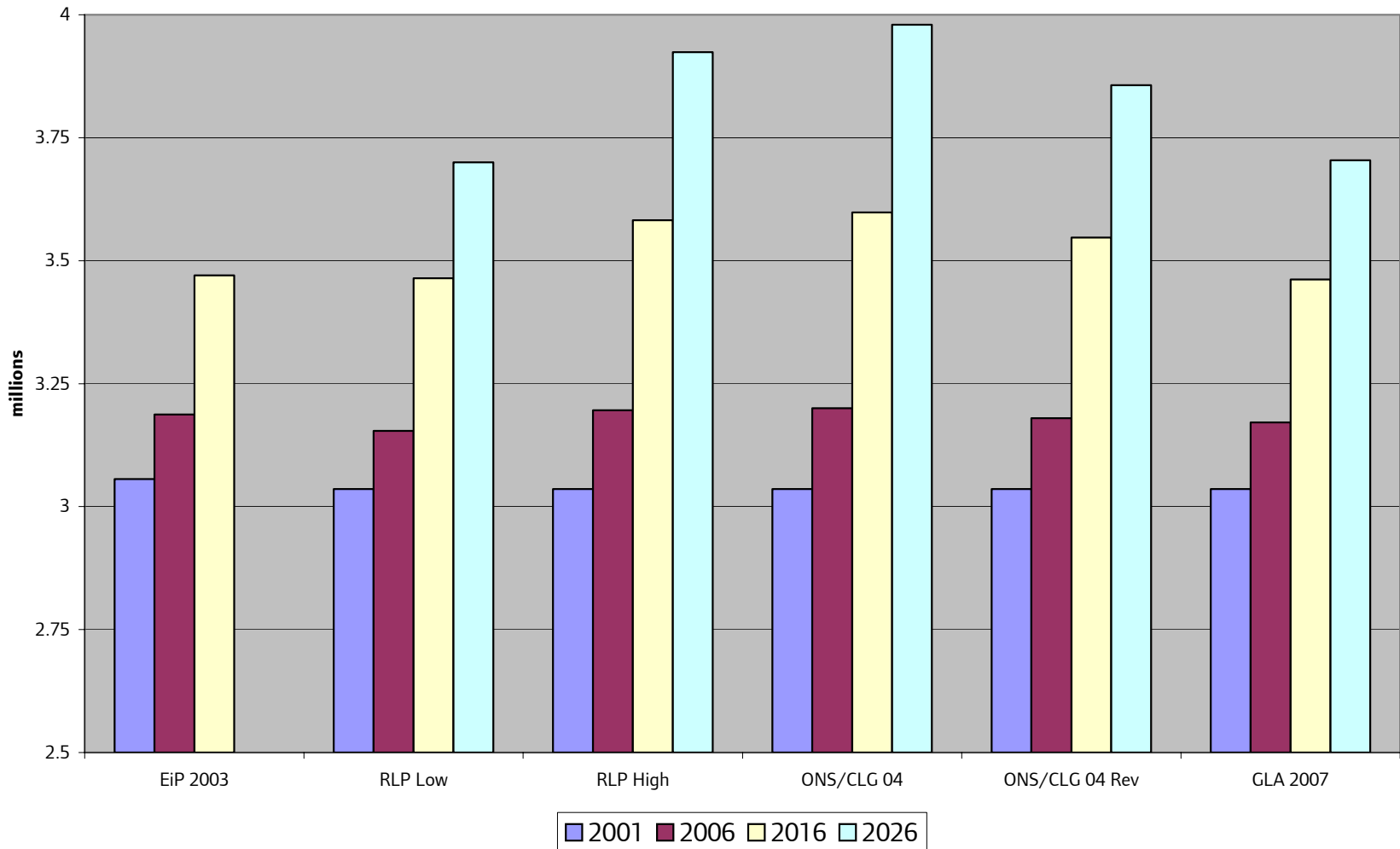
- If all revised/new data for 2001-06 are used as the base for revised GLA RLP High projections the outcome would be as follows:
- Possible impact for London:
  - 2006 population lower by 78.9k or 15.8 k/year
  - 2006            7.52 m pop            3.17 m hholds    2.34 ahs
  - 2016            7.93 m pop            3.46 m hholds    2.26 ahs
  - 2026            8.24 m pop            3.70 m hholds    2.20 ahs
  - 2006-26    +0.73 m pop            +0.53 m hholds or 26.6 k/year
- Note that this calculation uses the higher AHS from GLA projections
- This is close to current capacity-led RLP Low

# Population Summary





# Households Summary



# Other Considerations

- **ONS mid-2006 population estimates for London imply:**
  - 2005-06 international migration: **a reduced gain of 70k**
  - 2005-06 migration within UK: **a reduced loss of 81k**
  - Natural Change (births less deaths) **an increased gain of 66k**
  - **Is an annual increase of 56k sustainable?**
- **ONS is preparing 2006-based national population projections for October 2007 release**
  - **What will long-term international migration assumptions be?**
  - **Average of 2001-06: 175-180k?**
  - **Certainly greater than in 2004-based: 145k.**
  - **Could imply London net international inflow of 75-80k per year – similar to original 2004-based subnational projection.**
  - **What will fertility projection be?**

# Conclusions

- **New ONS population estimates – at the London level – have results more similar to GLA capacity based estimates**
- **Updated GLA population and household projections will be available in October and ONS 2006-based subnational population projections will be available in Summer 2008. Both will be using data for 2001-06.**
- **Next London Plan EiP – 2011 or 2012**
- **None of this work – either by GLA or ONS - considers short-term migrants?**
  - **What is their impact on London's housing?**
  - **BSPS 2008 Conference?**

# Contact

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