

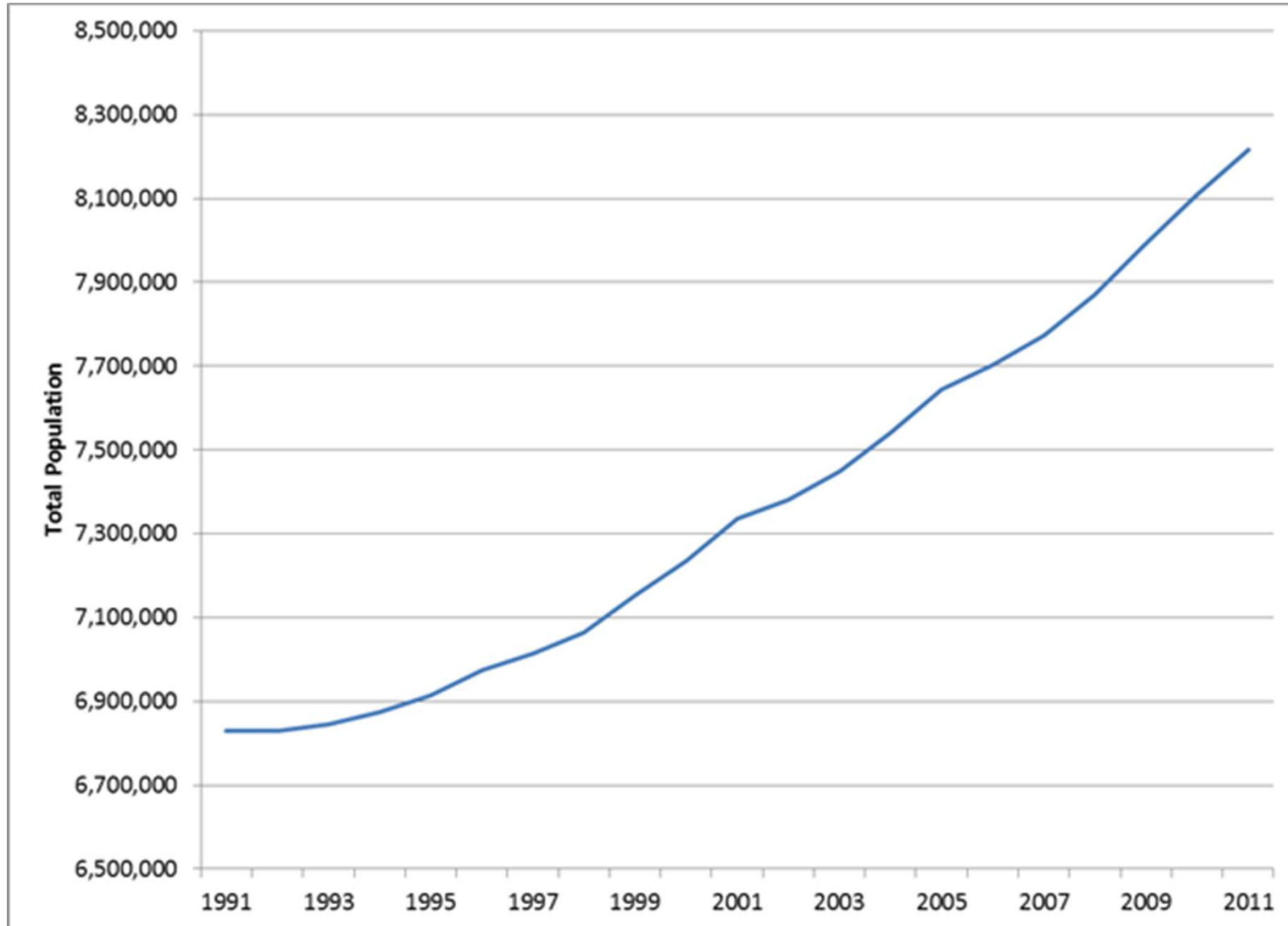
GLA population and household projections for FALP

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Intelligence Unit**

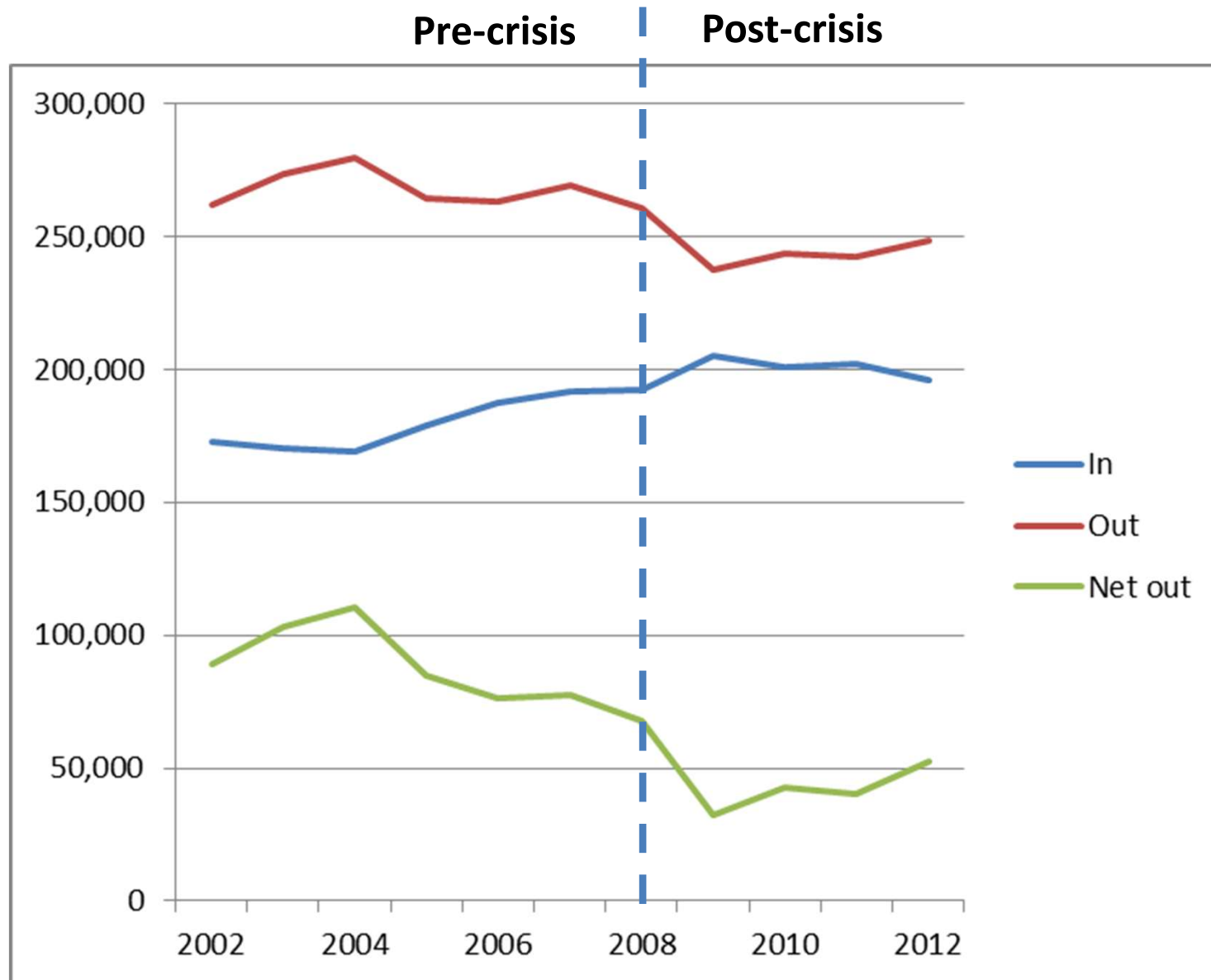
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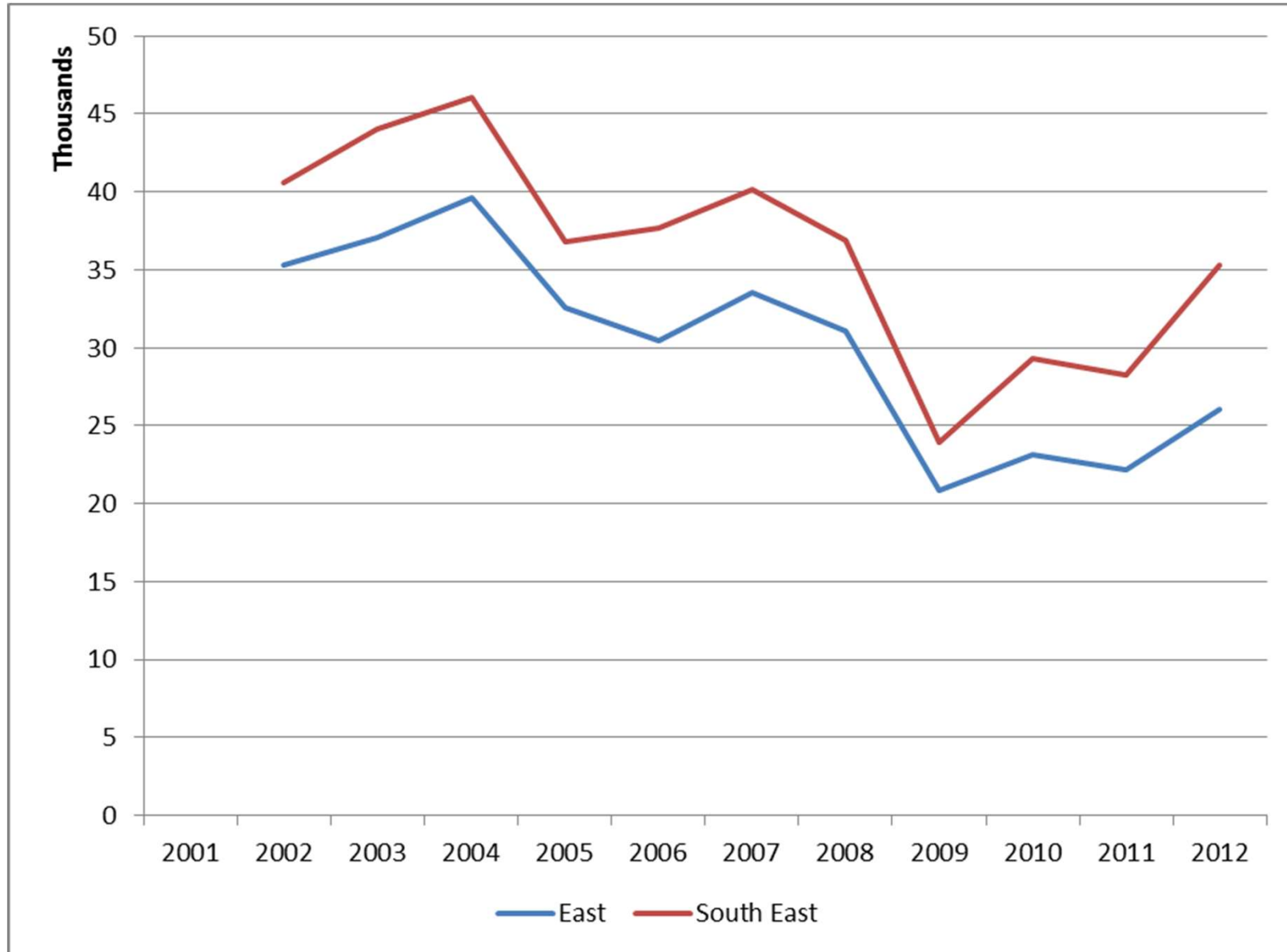
Population – since 1991



Recent trends – domestic migration



Net outmigration to wider South East



Impact of economic crisis

- Domestic out-migration from London fell
- Domestic in-migration to London rose
- Both linked to:
 - housing market/availability of credit
 - Relative strengths of London/UK job markets
- Net out-migration from London fell
 - From >75k pa before
 - To <50k pa after

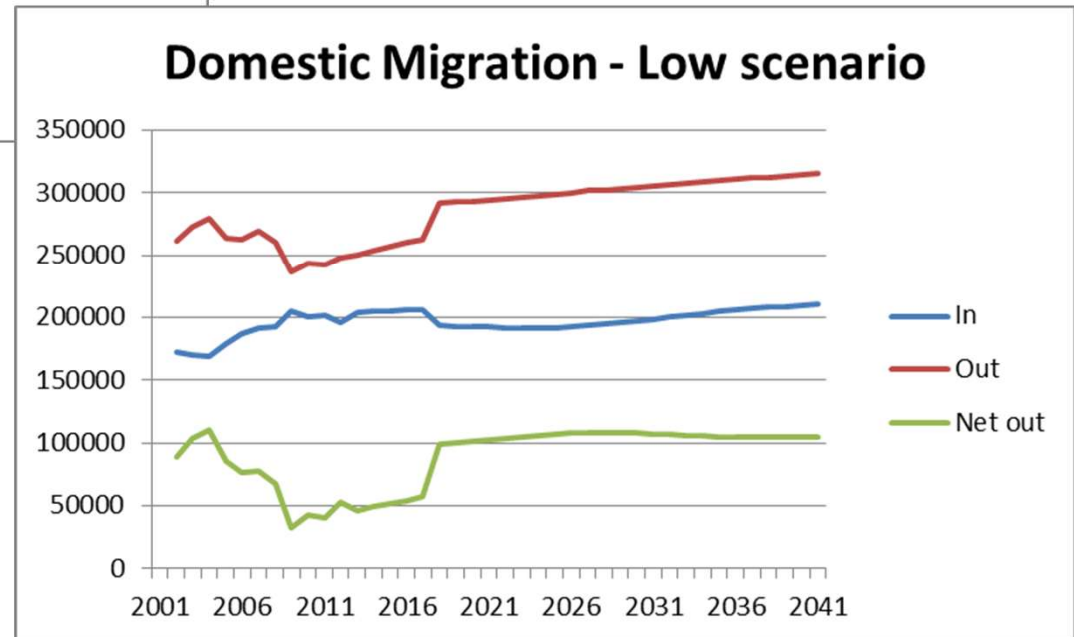
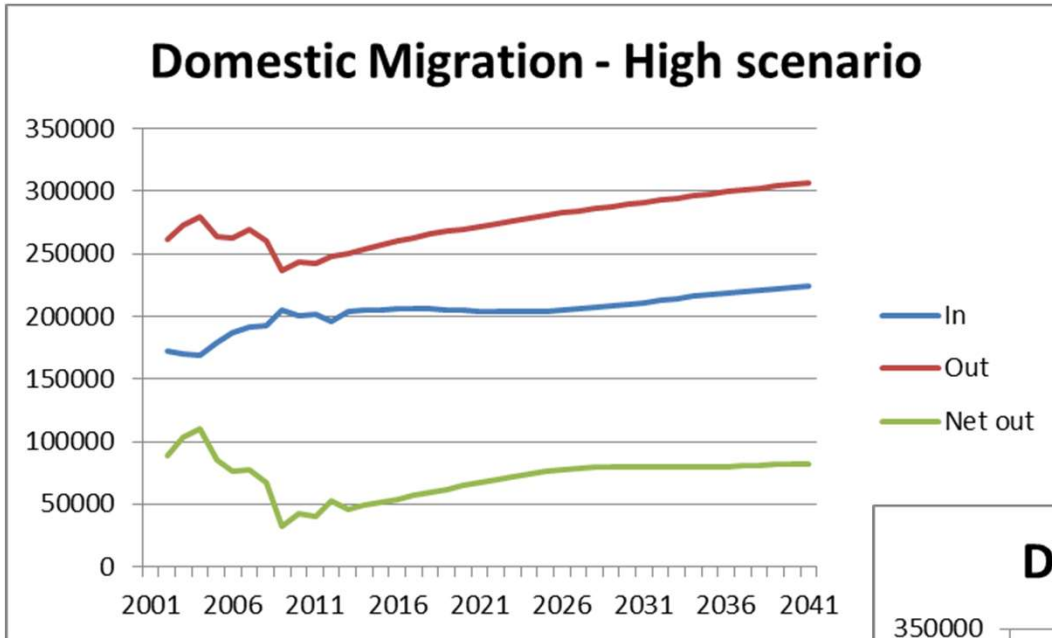
Impact of economic recovery

- Range of views on impact of recovery:
 - It will have no effect; the changes are structural and here to stay
 - London has adapted to increasing numbers of families staying in recent years and has become a more attractive place to raise children as a result
 - Migration patterns will revert to pre-crash norms
 - The changes in migration are entirely transient and due to problems in the housing and job markets - once these are resolved migration will return to pre-crisis patterns

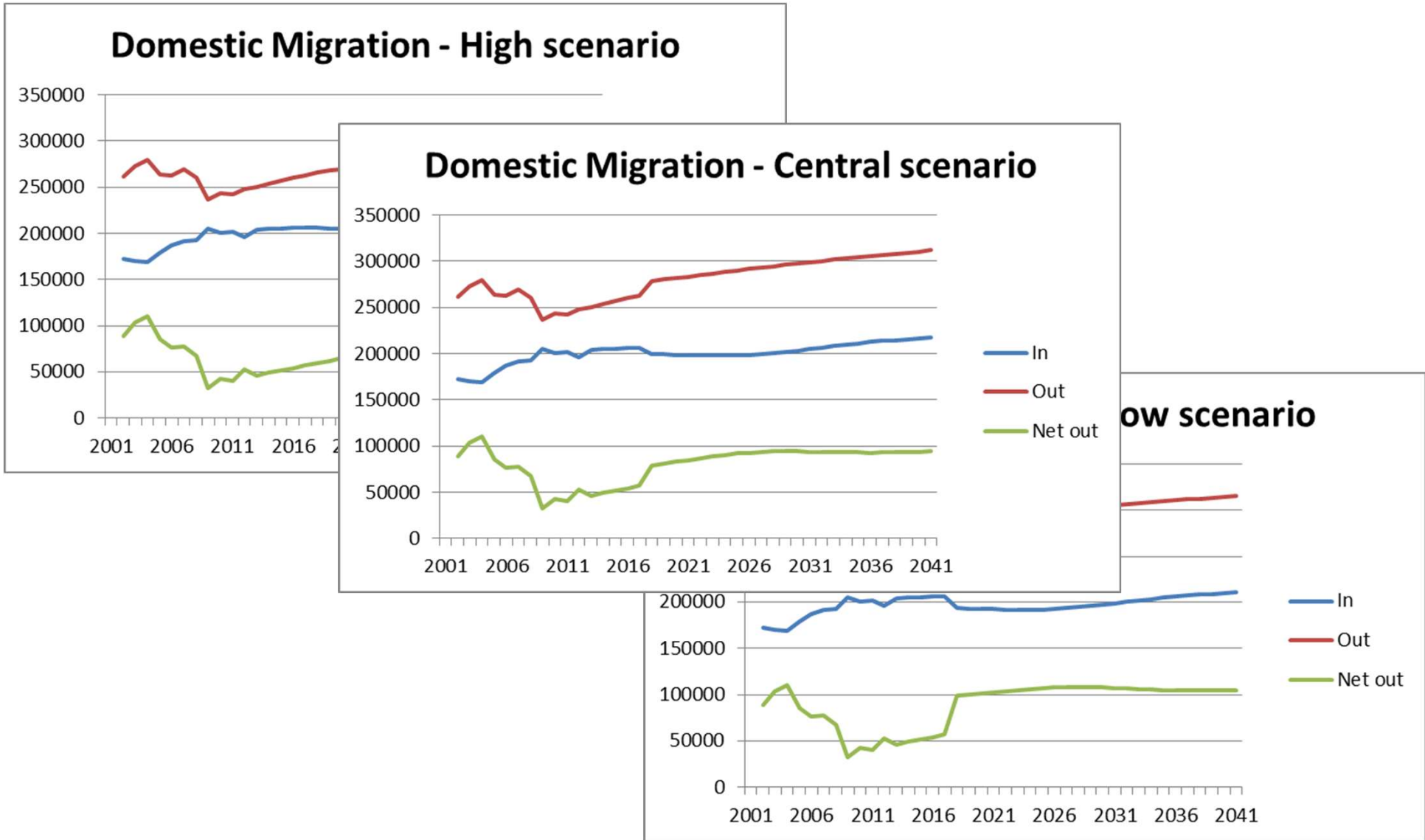
Projection scenarios

- Based around an hypothetical post-2017 economic recovery and effect on domestic migration
 - High – migration propensities based on recent 4 year patterns for duration
 - Low – after 2017, out-migration increases by 10%, in-migration falls by 6%
 - Central – after 2017, out-migration increases by 5%, in-migration falls by 3%

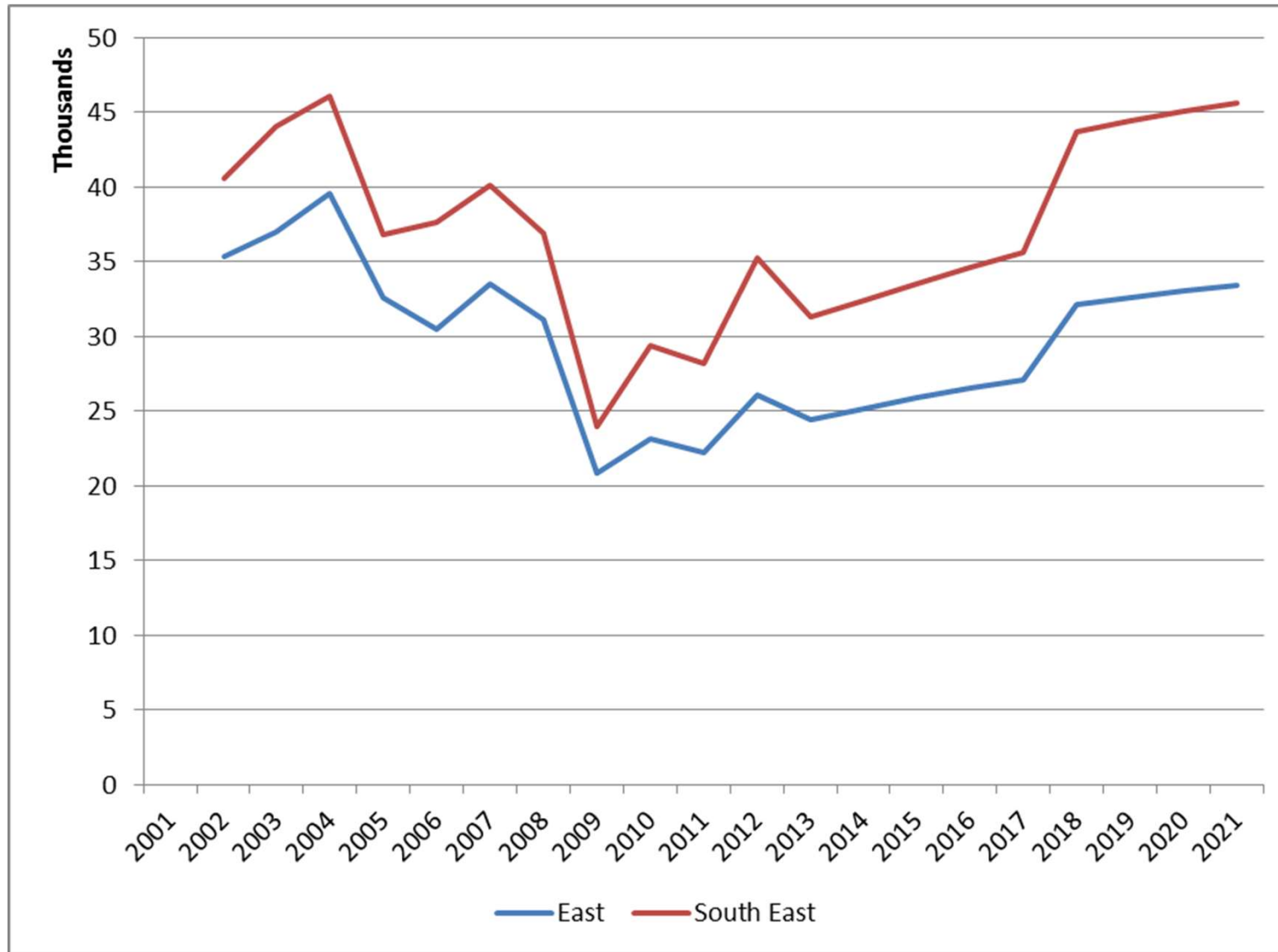
Projection scenarios



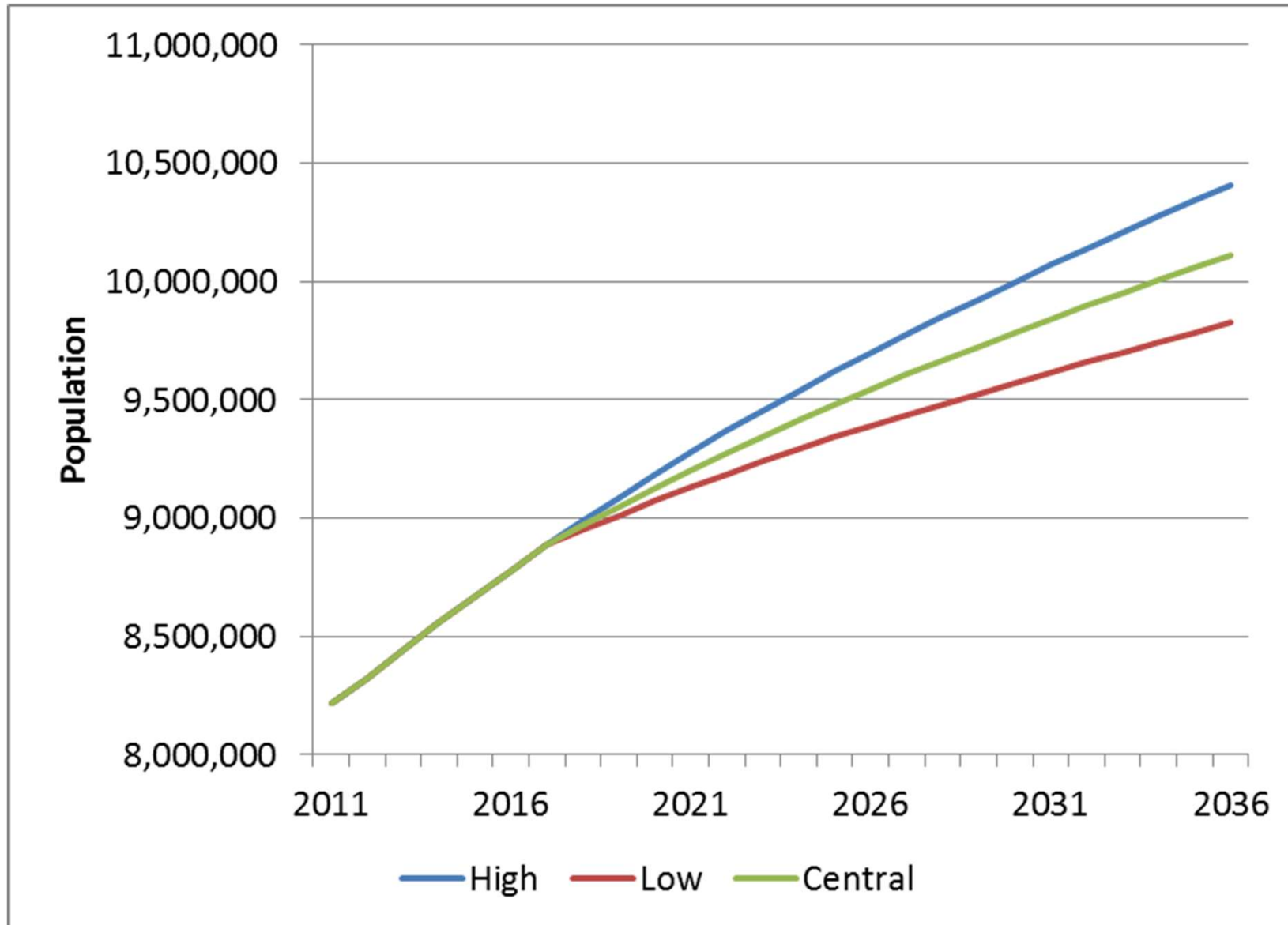
Projection scenarios



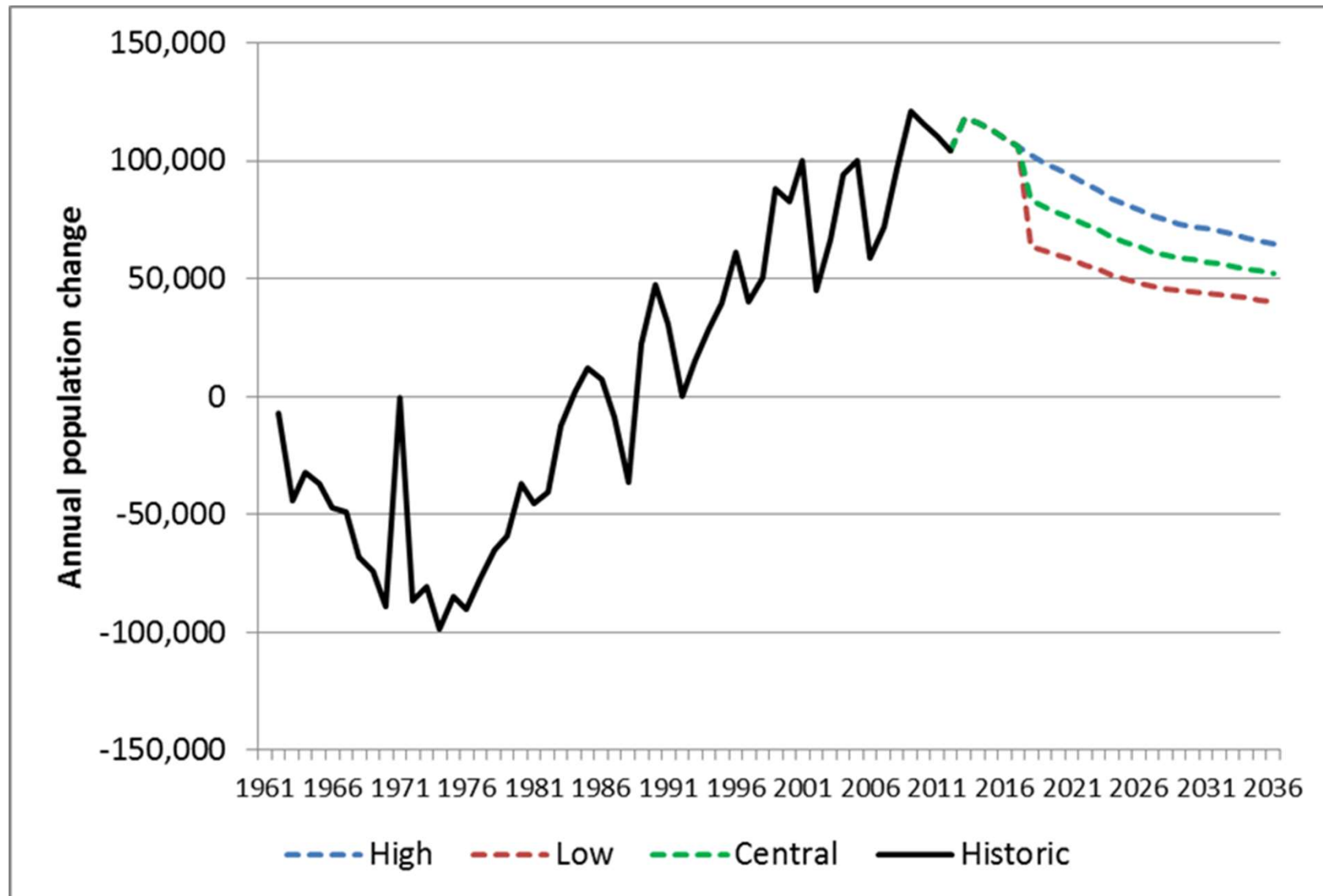
Net outmigration to wider South-East Central scenario



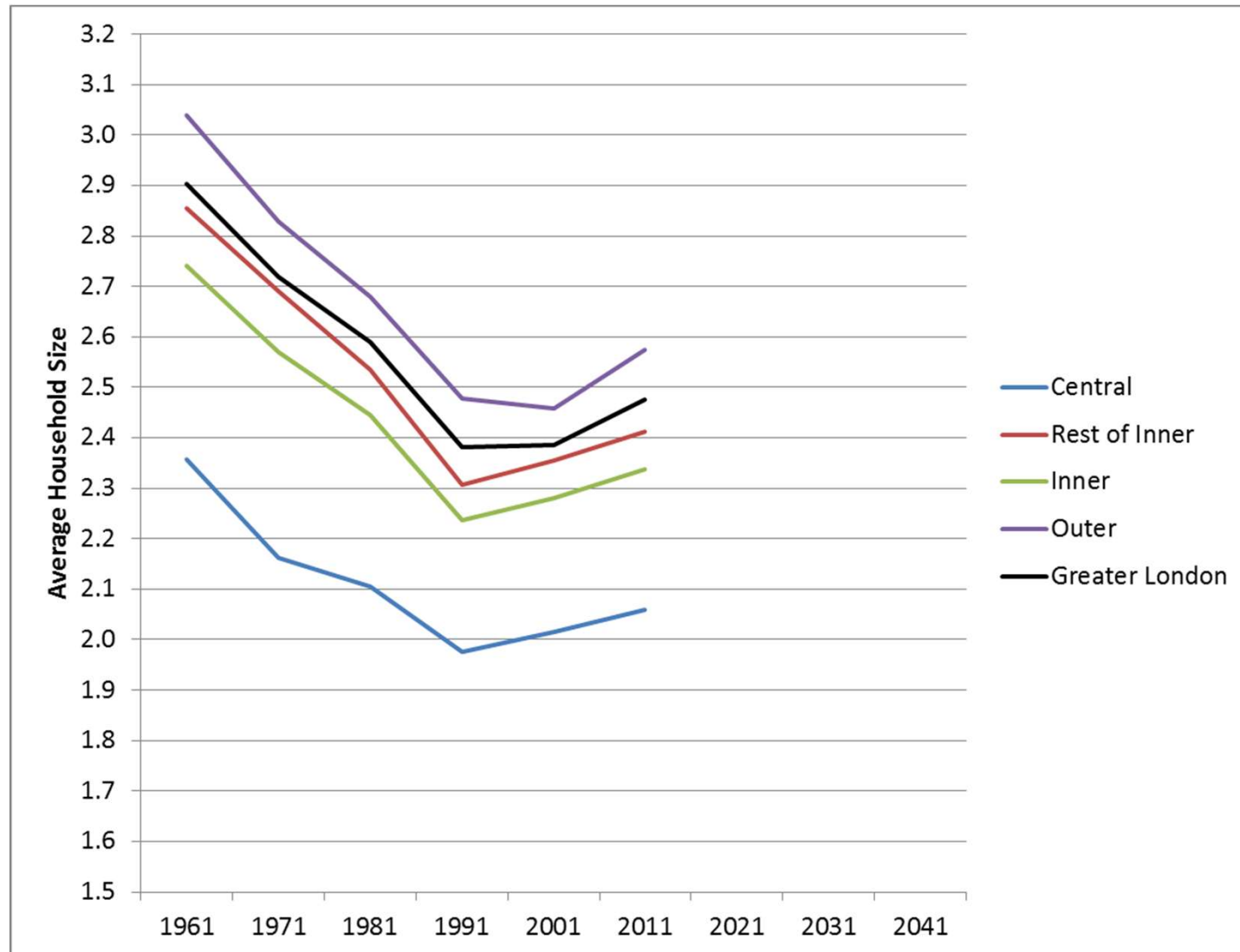
Projection results



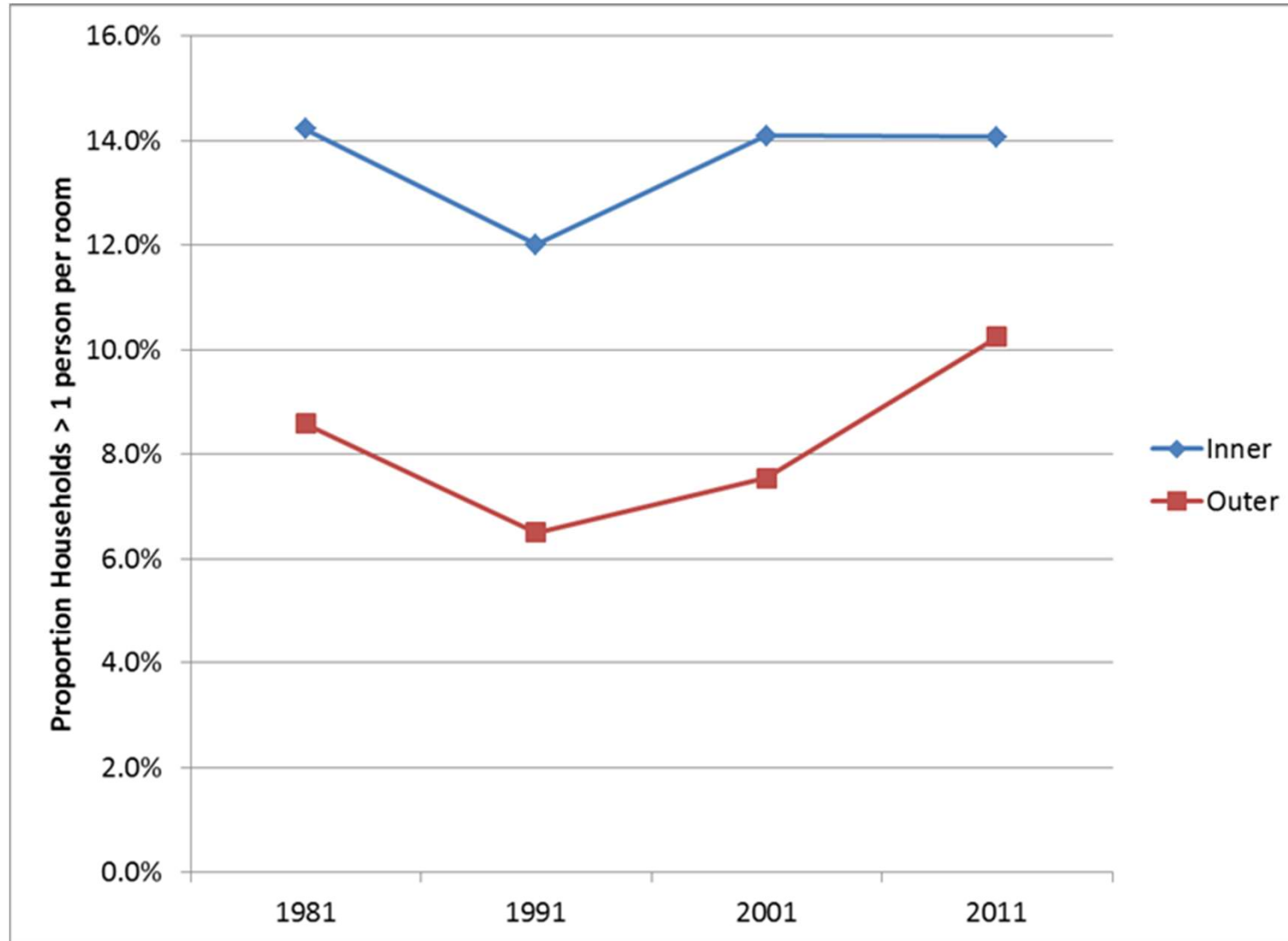
Projected growth in historic context



Household size - historic trends

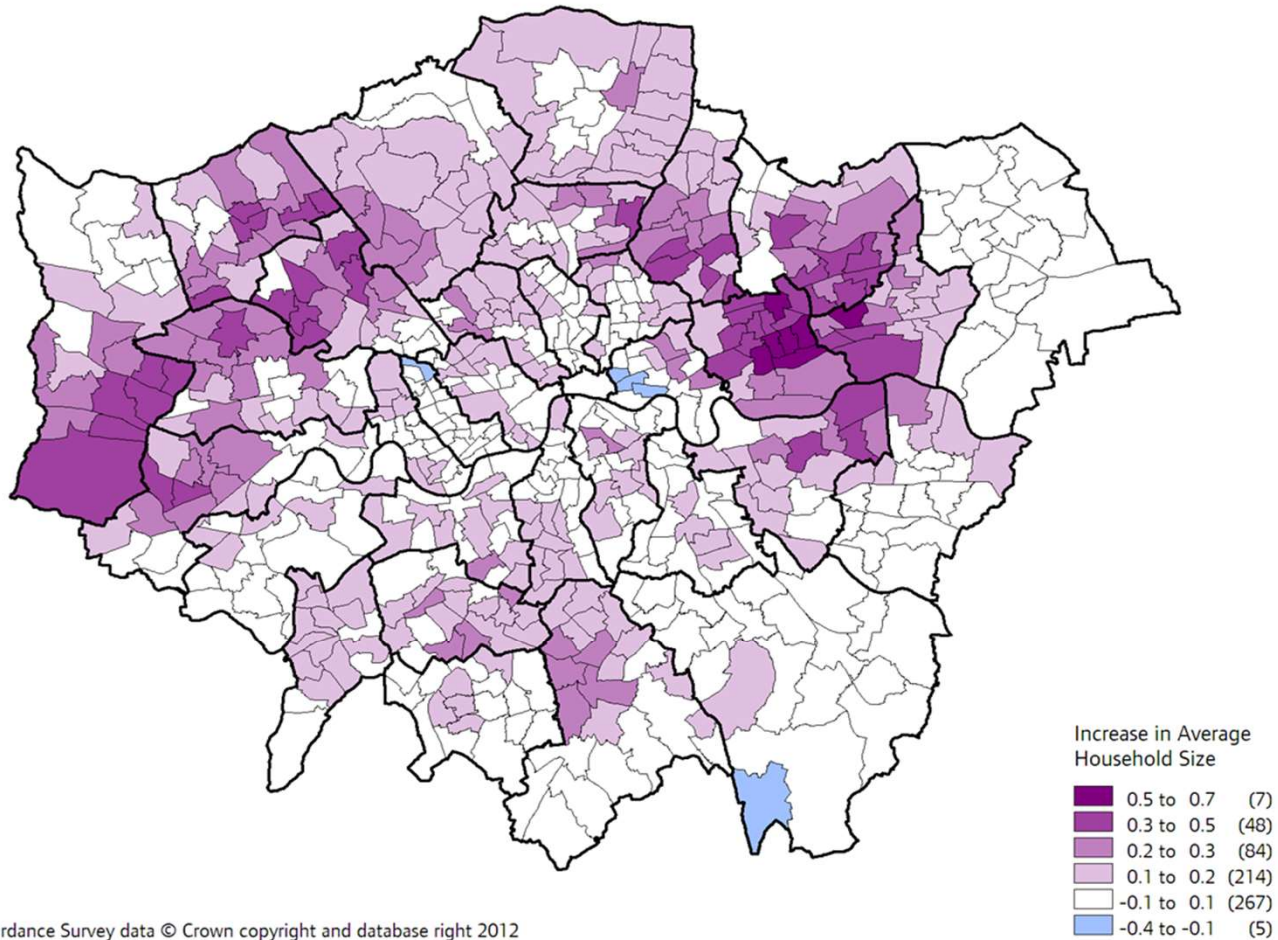


Trends in overcrowding



Household size - historic trends

Change in Average Household Size of London wards between 2001 Census and 2011 Census



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Household model adopted

- Opted to use DCLG Household Representative rates extrapolated to 2036
- Initial reservations about projected fall in household size
- On further investigation, assumptions look reasonable
- Not decided whether to use additional household formation scenarios

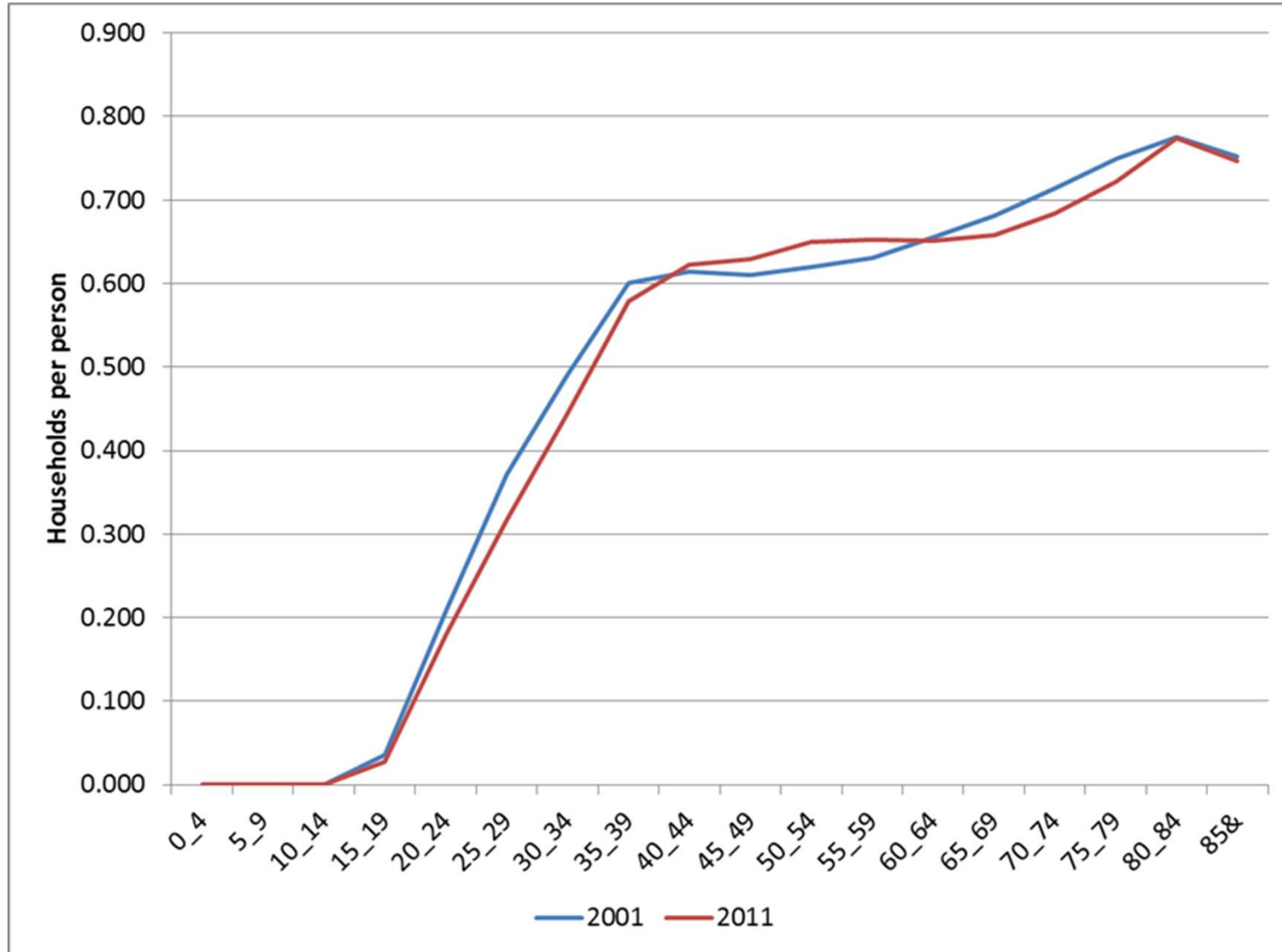
Drivers of household growth

- Growing population
- Household formation patterns
 - Extrapolated from past census data
- Age structure

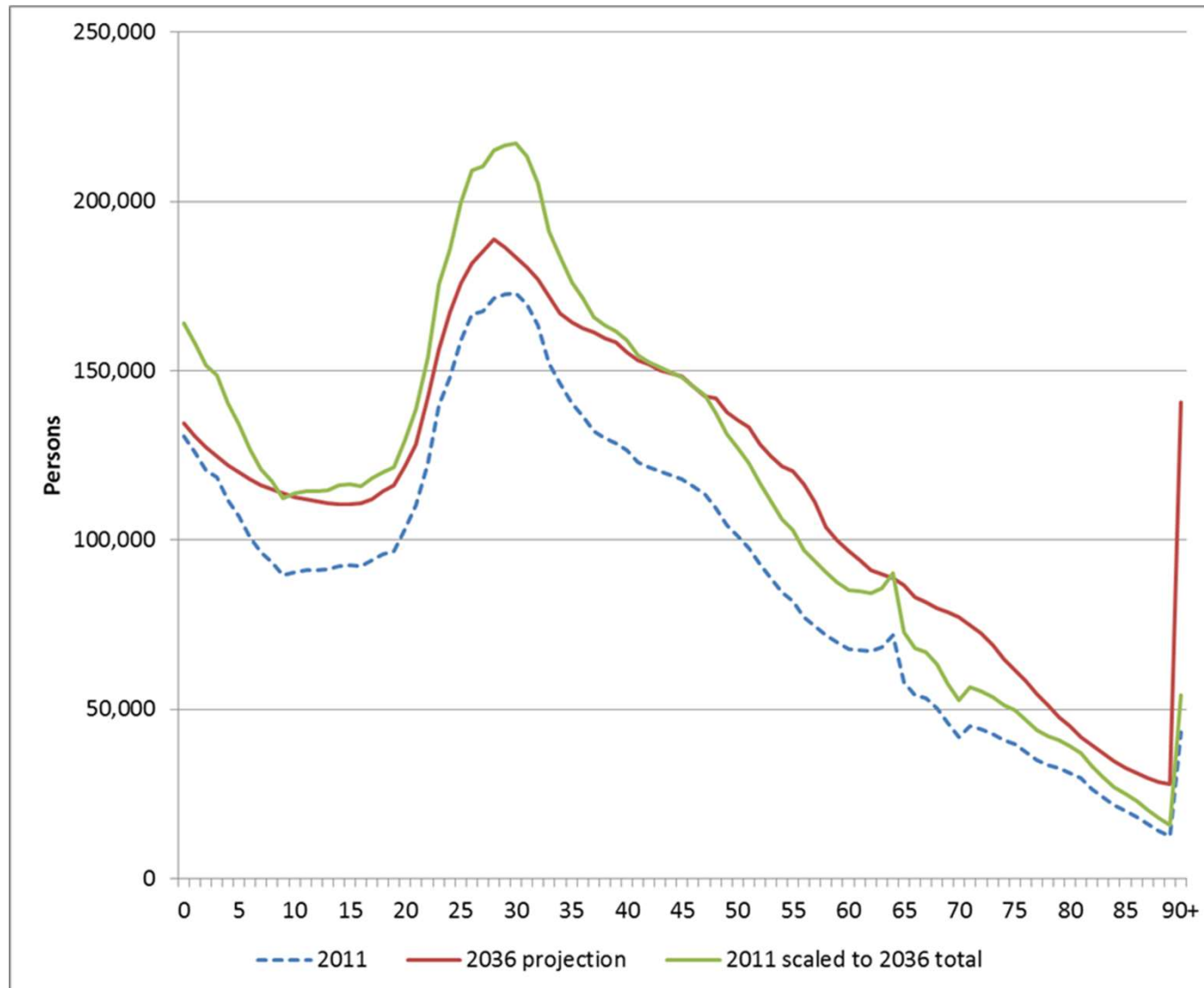
Impact of ageing population

- Higher proportions of older people give rise to smaller household sizes
- Projected fall after 2011 results from changing age structure
 - Baby boomers hit 65 after 2011 census
- DCLG assumptions actually give larger households than sticking to 2011 relationships
- Projected impact of ageing ~12.5k households per annum to 2036

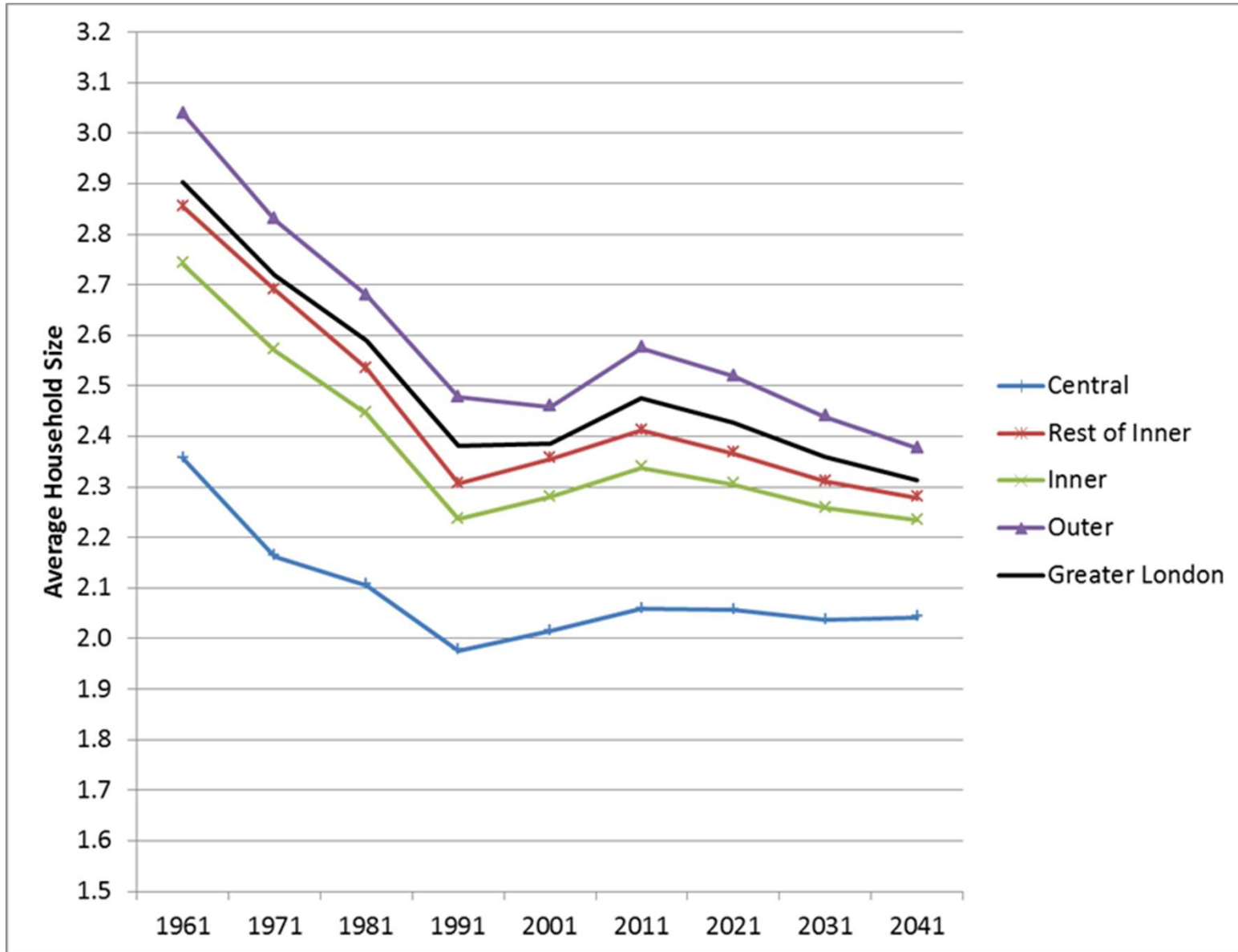
Headship rates rise with age



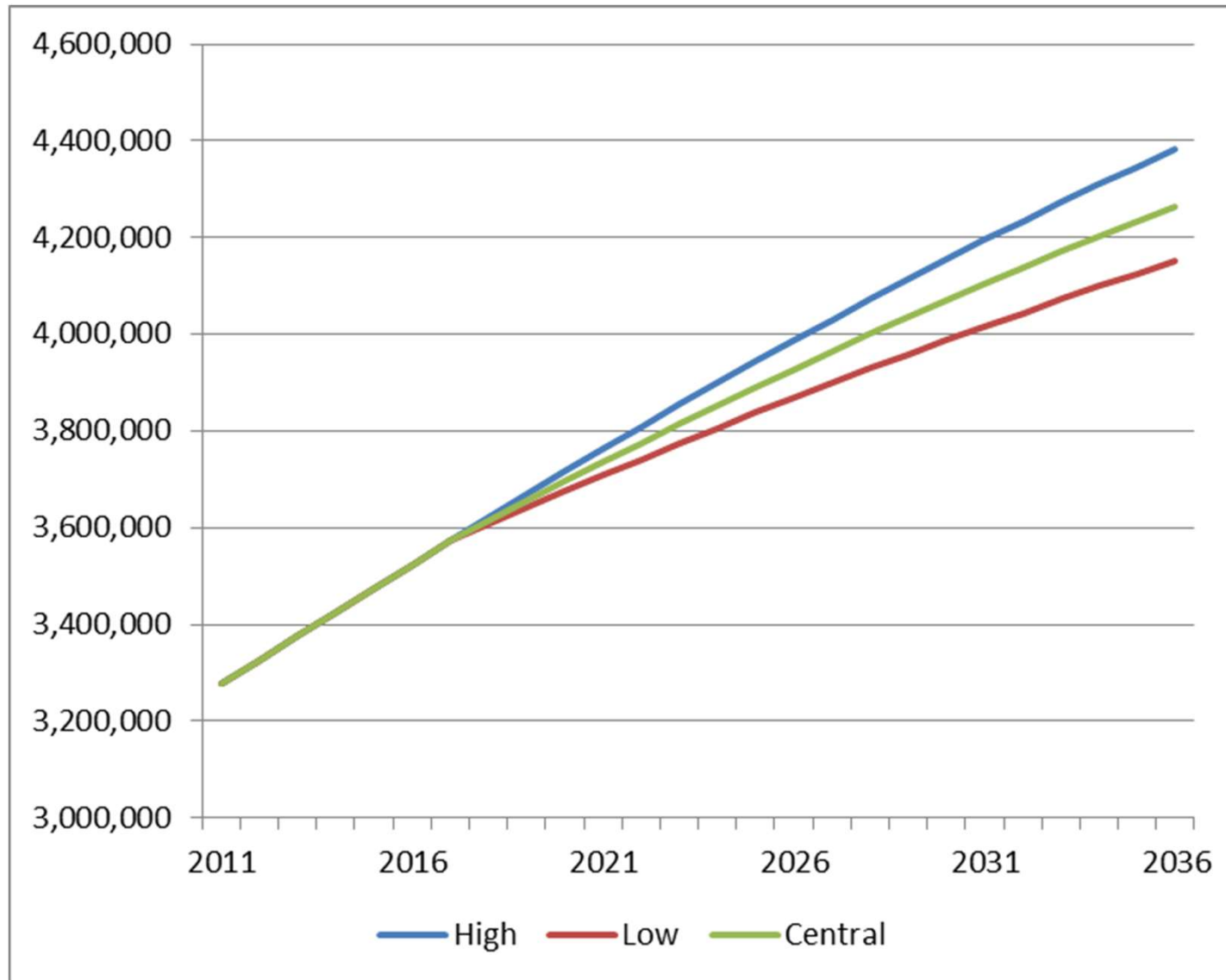
Projected change in age structure



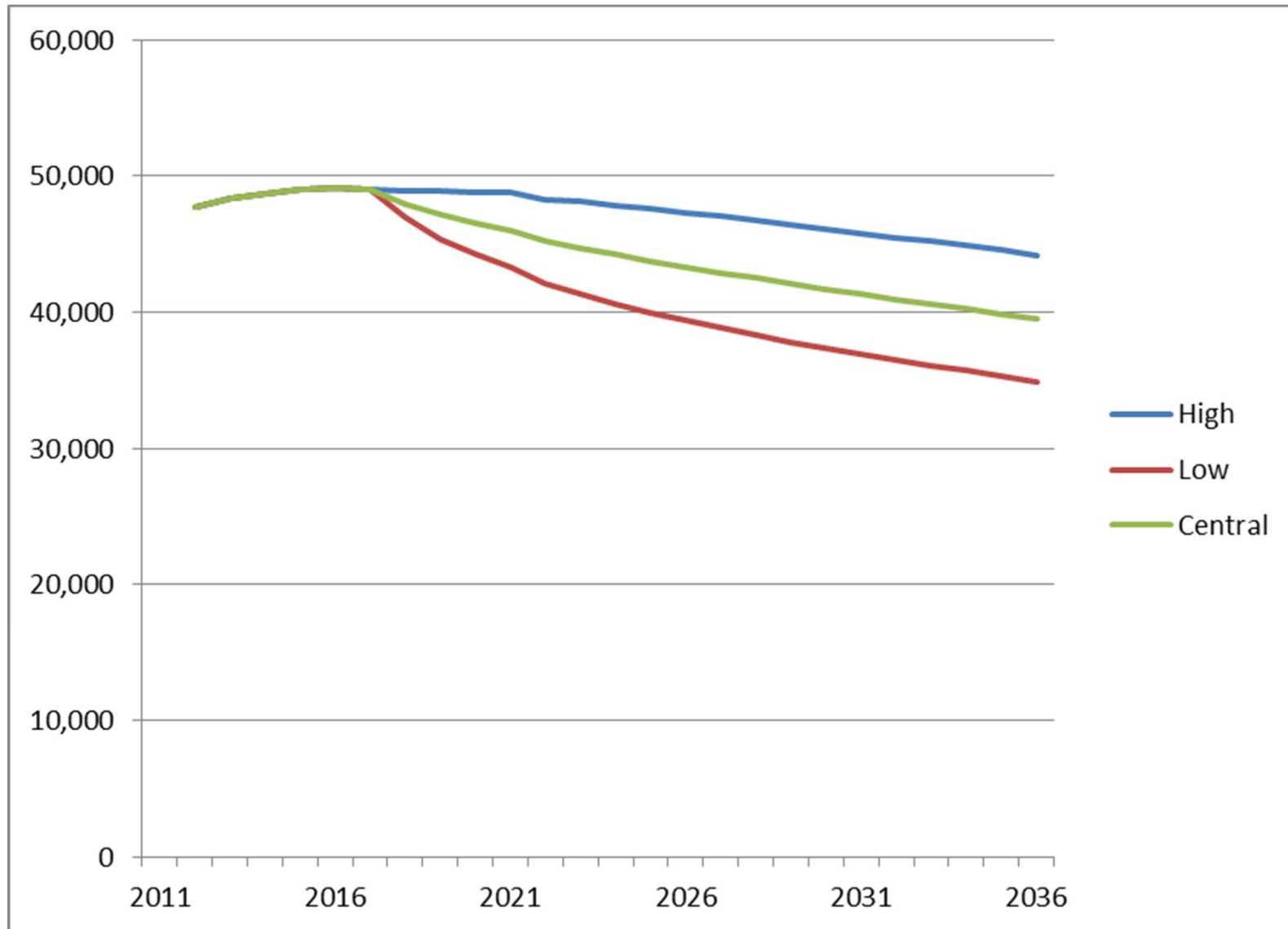
Household size – projected trends



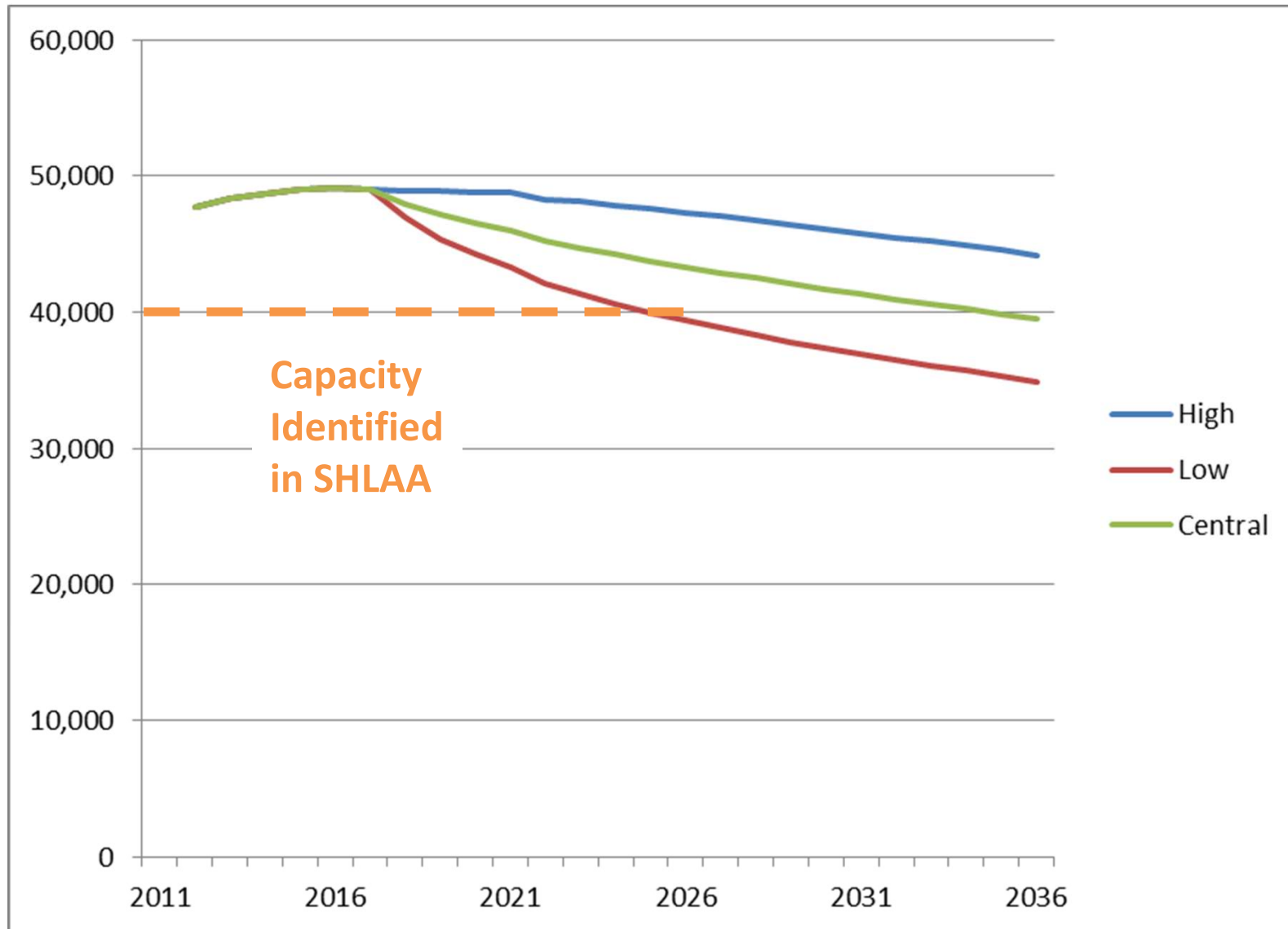
Household projections - results



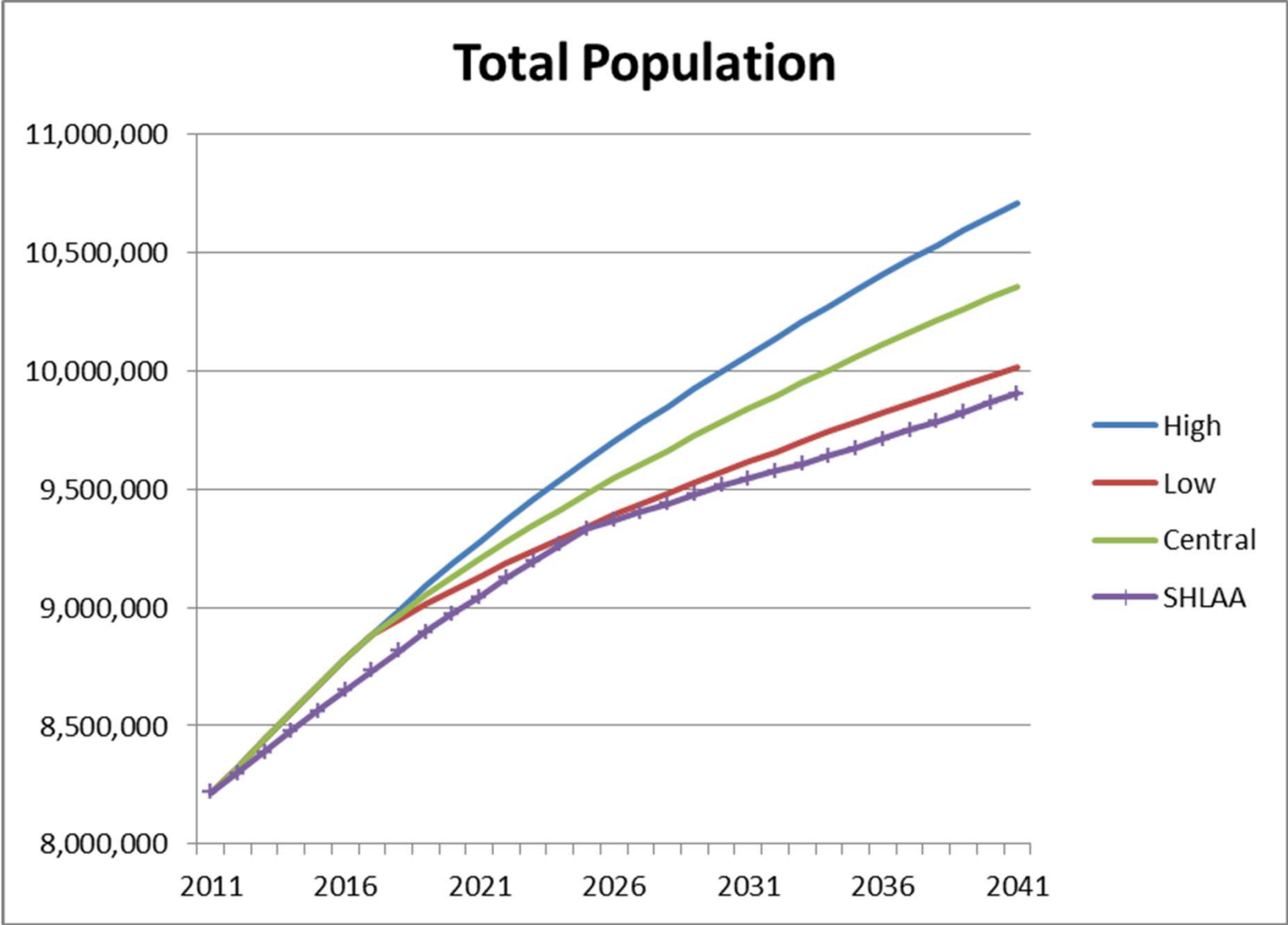
Annualised household growth



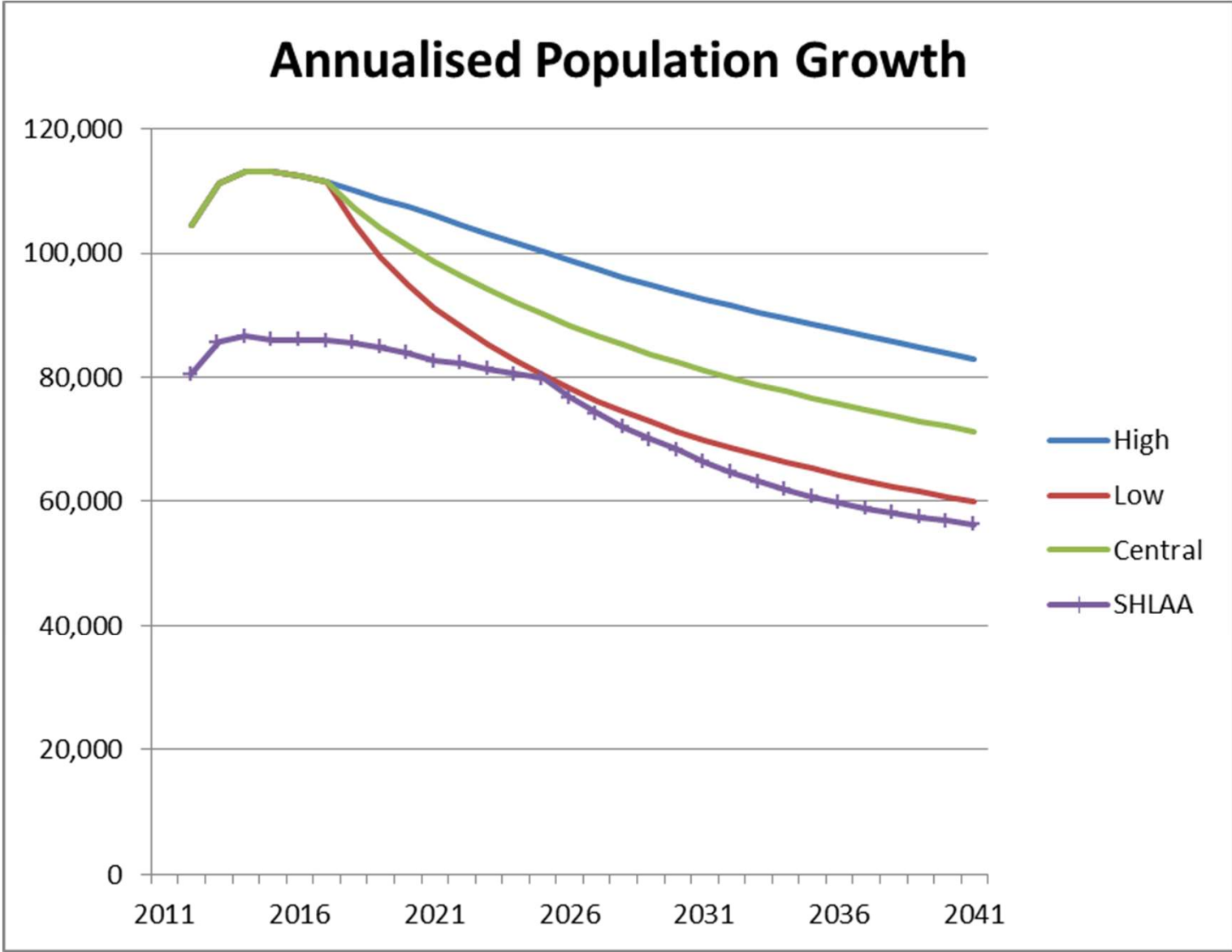
Annualised household growth



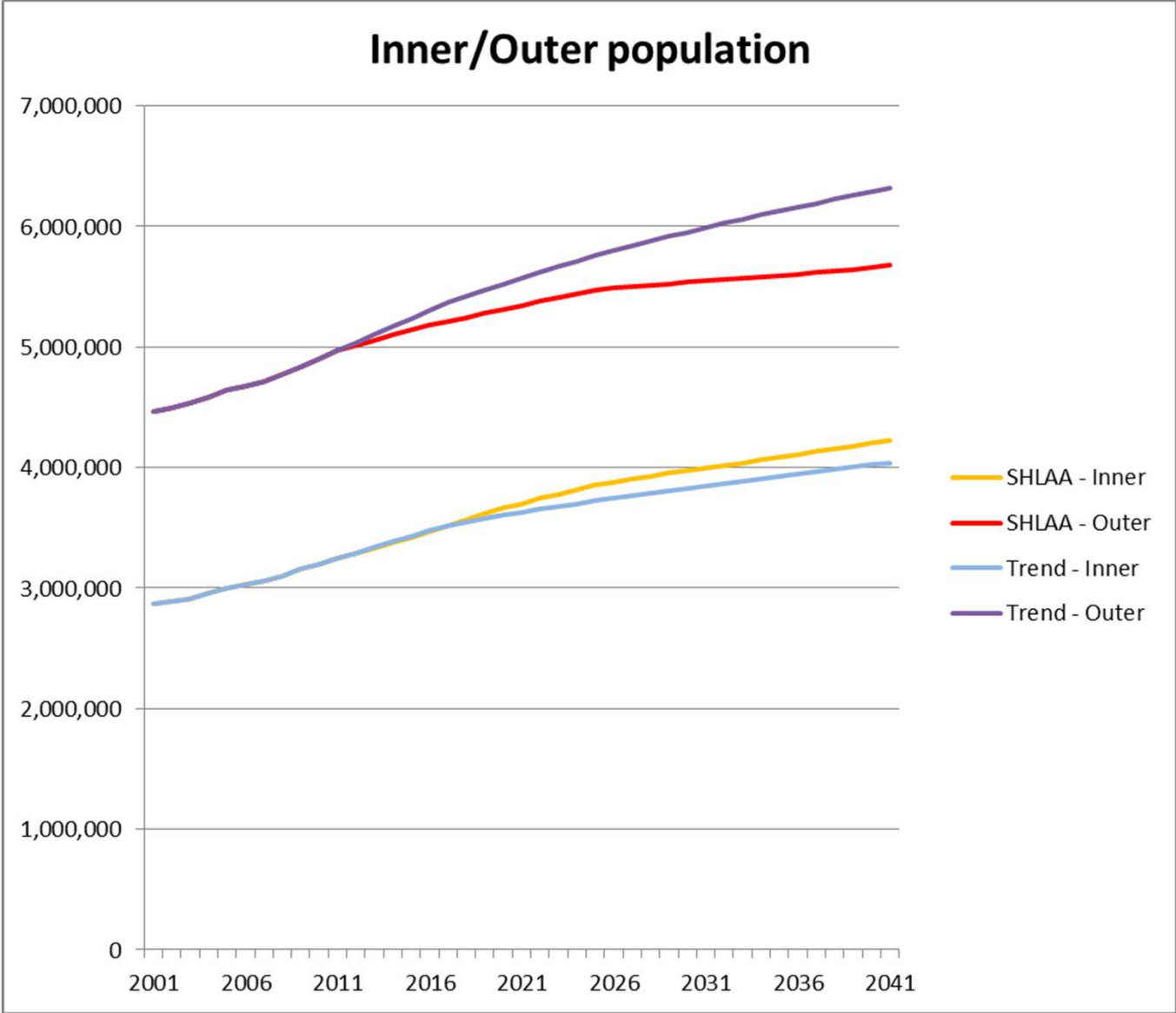
Comparison with SHLAA projections



Comparison with SHLAA projections



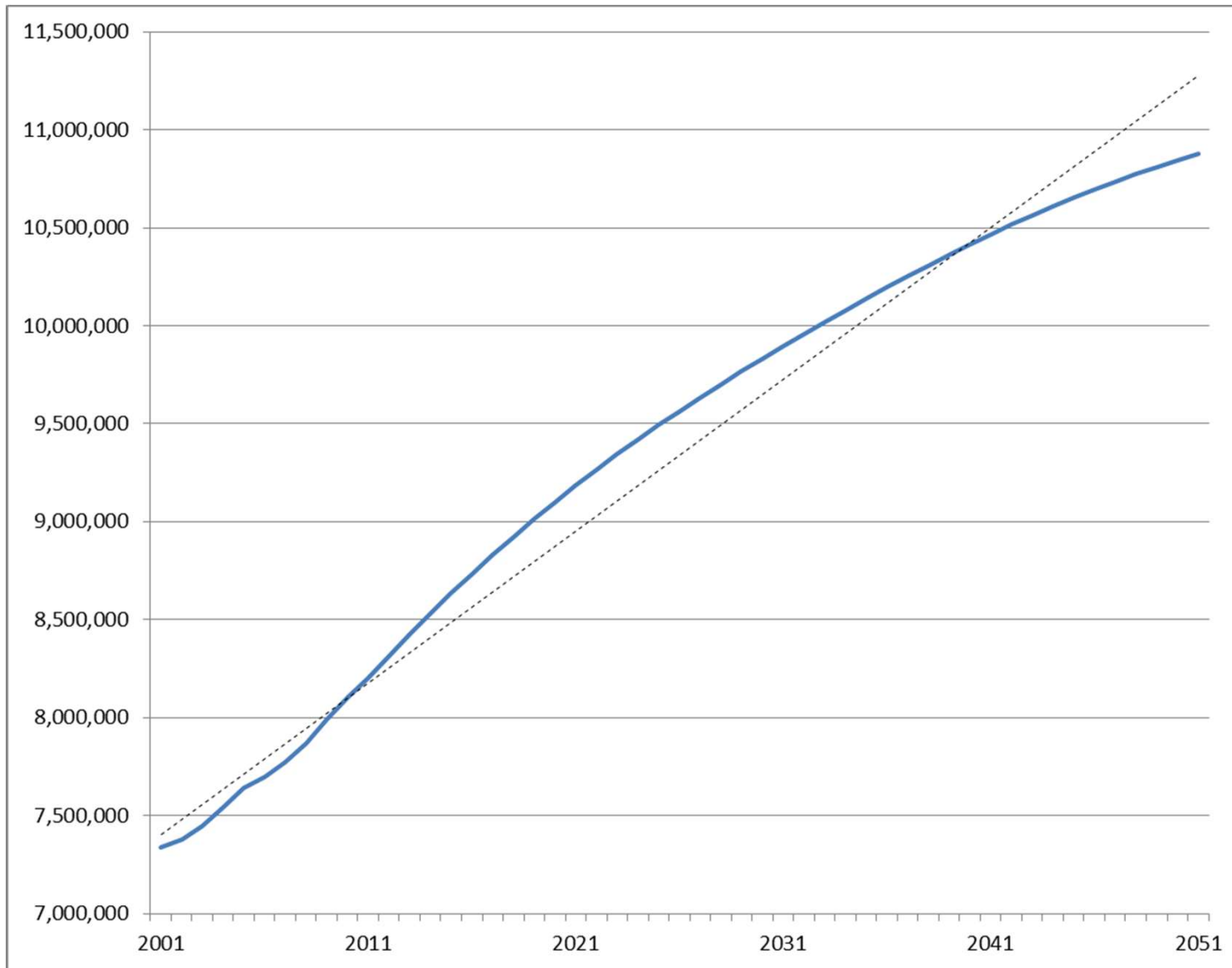
Comparison with SHLAA projections



Draft Infrastructure Plan projections

- Final specification for projections yet to be agreed
- Long term projections highlight differences in population and employment projection methodologies
- Employment projections assume linear trend
- Population growth tends to fall away as Inflows do not keep pace with outflows

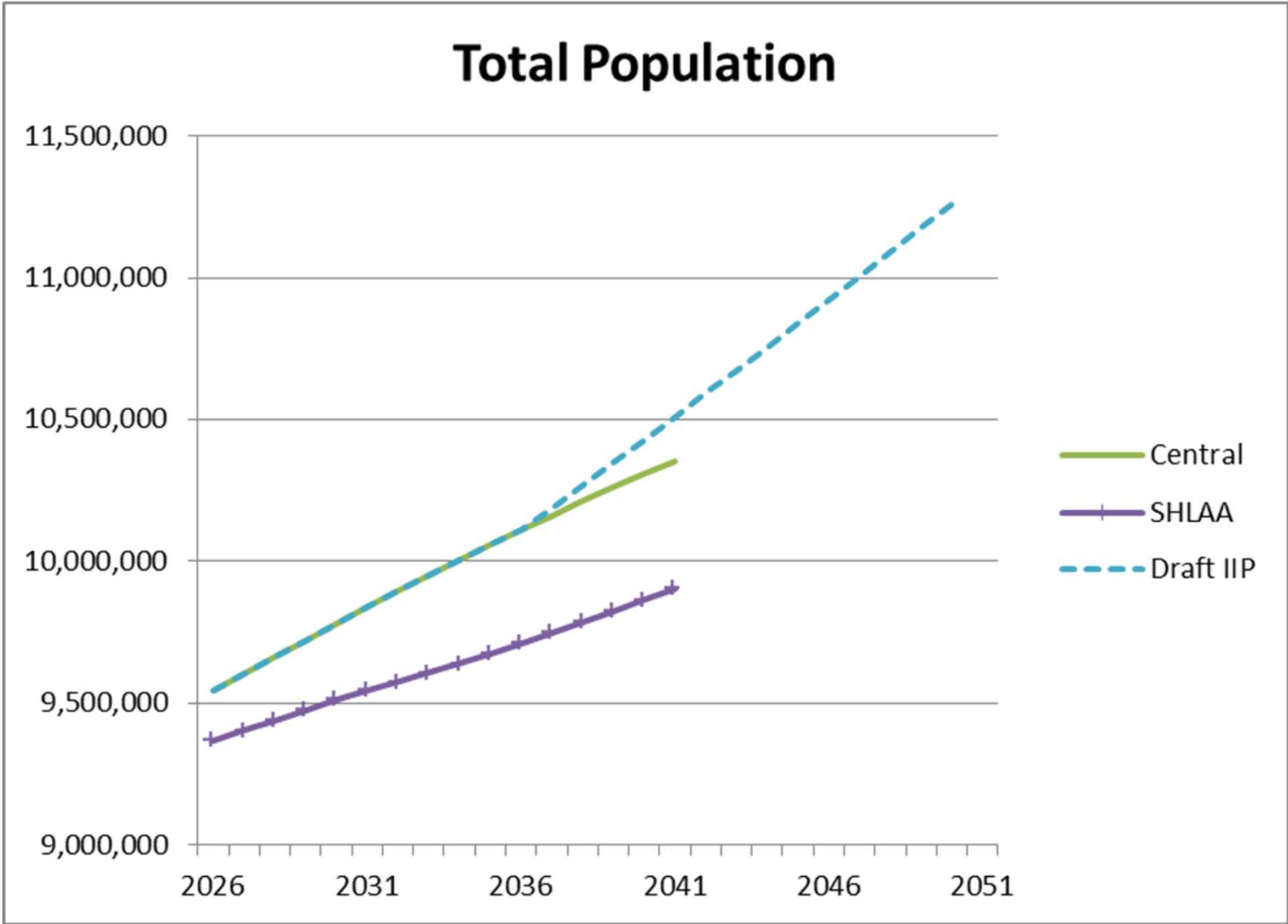
Non-linear population growth



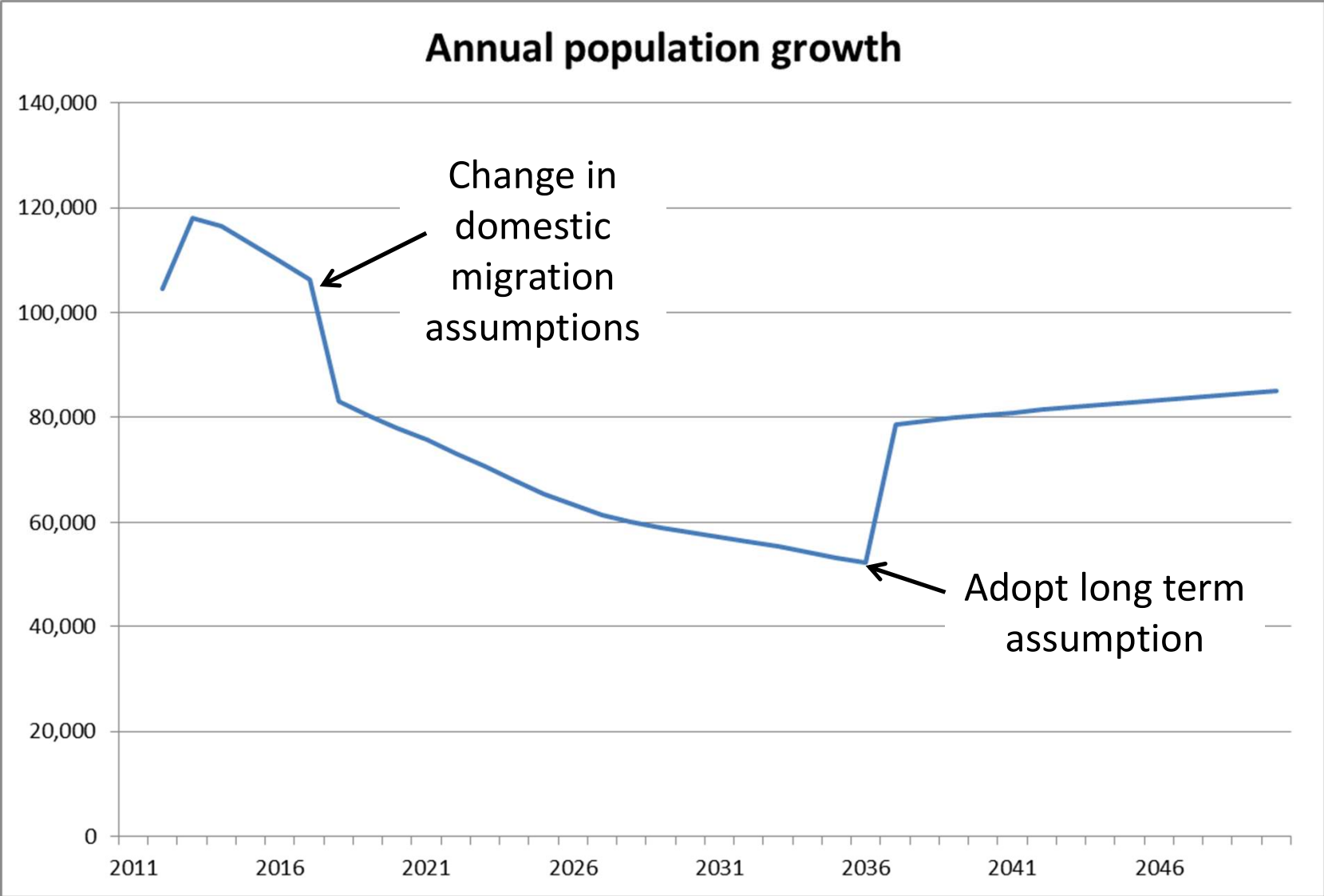
Draft projection

- As Central London Plan projection to 2036
- Then constant growth assumed for 2036-2050
- All migration held at 2036 levels except international inflows (adjusted to match target population growth)
- Not the most elegant solution...

Draft Infrastructure Plan projections



Draft Infrastructure Plan projections



Contact

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