

2010 Round Demographic Projections using the 2009 SHLAA

Background

In August 2010 revised London Plan and SHLAA borough projections were published as *GLA Intelligence Updates 16-2010 and 17-2010*. These were part of the GLA 2009 round of demographic projections and incorporated the housing targets in the draft replacement *London Plan* (October 2009) and 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>

The projections in this *Update* have used the same SHLAA development data but have been created using a revised GLA borough level population projection model and revised borough household projection models which incorporate the relationships between population and household representatives as developed within the CLG 2008-based household projections published on the 26th November 2010 (see *GLA Intelligence Update 27-2010*).

In the preparation of the projections the population by age and gender has been linked to households using the borough-level relationship status and household representative rates as projected in the CLG 2008-based household projections. Allowance has also been made for those not living in private households by their age, gender and relationship status.

The GLA 2010 round of projections incorporate known births and deaths up to mid-2009 and follow the fertility and mortality rate assumptions made by ONS for the 2008-based national population projections for England (see *DMAG Update 14-2009*). However, as births since mid-2008, both nationally and in London, have been significantly higher than indicated by the ONS projections it was decided, first, to model birth totals for 2009-10 based on births in calendar year 2009, the latest available for boroughs, and, second, that the resulting fertility rates would be held constant between 2009-10 and 2013-14. After 2013-14 the rates follow the nationally projected decline in fertility but delayed by five years.

Between 2001 and 2009 the population totals follow the trend in the ONS mid-year estimates for London but the borough distribution is established by the population capacity of each borough as determined by the total number of households, based upon the known annual numbers of new homes. This means that the 2009 populations of some boroughs exceed the ONS estimates for mid-2009 while other boroughs fall below those estimates.

Housing Provision

From 2009 the projections use the annual average borough housing capacities for 2009/11, 2011/16, 2016/21, 2021/26 and 2026/31 as determined by the SHLAA. These are equivalent to Table 4.15 in the SHLAA report (see link above). These capacities include conventional supply on identified large and small sites, non-self contained accommodation and dwellings returned from vacant.

Table 1: Annual Average Housing Capacities for London boroughs, by SHLAA phase

	2009-11 Phase 1	2011-16 Phase 2	2016-21 Phase 3	2021-26 Phase 4	2026-31 Phase 5
Camden	822	812	749	691	592
Kensington & Chelsea	647	381	817	331	142
Westminster, City of	1,302	1,019	721	526	507
City of London	92	74	132	97	97
Central boroughs	2,864	2,286	2,419	1,645	1,338
Hackney	1,319	1,380	1,092	964	722
Hammersmith & Fulham	503	586	712	601	391
Haringey	449	1,265	577	413	486
Islington	1,815	1,461	1,188	1,240	1,054
Lambeth	1,770	1,530	1,392	1,587	1,333
Lewisham	882	1,558	922	901	828
Newham	1,125	2,939	2,210	1,015	625
Southwark	1,894	2,153	2,270	1,220	1,185
Tower Hamlets	3,783	2,860	3,135	2,013	1,118
Wandsworth	1,751	1,129	1,580	1,331	737
Rest of Inner boroughs	15,289	16,861	15,078	11,283	8,480
Inner London	18,152	19,147	17,497	12,927	9,818
Barking & Dagenham	887	1,740	1,330	959	758
Barnet	658	3,491	1,170	1,707	710
Bexley	150	318	414	435	398
Brent	771	1,267	967	617	308
Bromley	632	751	617	400	335
Croydon	1,515	1,707	1,326	1,023	1,038
Ealing	474	1,014	862	990	640
Enfield	451	585	674	512	248
Greenwich	1,531	2,870	2,374	1,494	426
Harrow	570	523	348	418	466
Havering	468	1,202	1,423	687	433
Hillingdon	1,603	863	480	602	445
Hounslow	1,279	507	512	537	369
Kingston upon Thames	248	441	375	317	261
Merton	321	433	345	342	393
Redbridge	1,168	903	679	373	306
Richmond upon Thames	344	325	239	190	165
Sutton	389	321	223	237	197
Waltham Forest	688	992	760	648	571
Outer London	14,146	20,251	15,118	12,488	8,465
Greater London	32,298	39,399	32,615	25,415	18,284

Greater London Results

Between 2011 and 2031 London's population is projected to increase by 940 thousand persons, equivalent to 12 per cent. Households are expected to increase by 579 thousand, or 18 per cent. The difference in the rates of change is mainly a reflection of the 4.8 per cent decline in average household size from 2.37 to 2.25. The population resident in communal establishments is also projected to increase by 12 thousand (12 per cent) as a result of the increasing population over the age of 75.

Although the household types in the CLG 2008-based projections differ markedly from those in the CLG 2006-based projections, the structure of household change is still dominated by the increases in one-person households (412 thousand). There is also a significant increase in lone parent families with one dependent child (45 thousand). These two household types account for 71 per cent and 8 per cent respectively of the total household growth between 2011 and 2031. The increase in the overall number of couple and lone parent families accounts for 28 per cent of the overall household growth; however the only household type that is projected to decline in the next twenty years, by 14 thousand, is the archetypal family household formed by a couple with two dependent children.

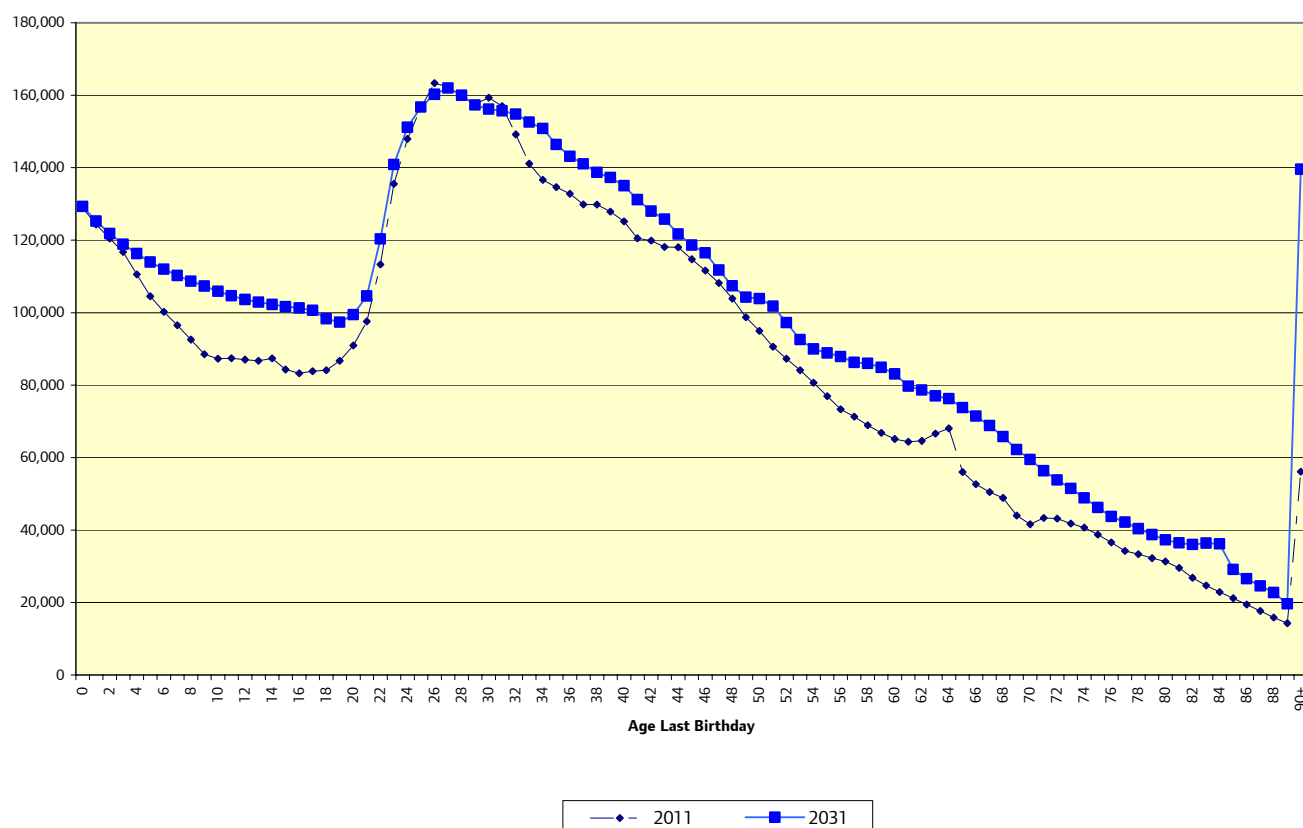
Table 2: Summary of Population and Household Projection for Greater London, (thousands, except average household size)

	2001	2006	2011	2016	2021	2026	2031
Couple Households	1,377.4	1,345.5	1,342.1	1,362.4	1,376.6	1,389.9	1,400.4
All Other Households	1,659.1	1,806.7	1,954.0	2,130.6	2,279.5	2,393.4	2,474.3
Total Households	3,036.6	3,152.2	3,296.1	3,493.1	3,656.2	3,783.2	3,874.7
Private Household Population	7,243.8	7,466.1	7,804.5	8,217.2	8,481.9	8,641.8	8,732.2
Average Household Size	2.39	2.37	2.37	2.35	2.32	2.28	2.25
Communal Population	93.1	93.9	95.9	97.8	100.0	103.8	107.9
Total Population	7,336.9	7,559.9	7,900.5	8,314.9	8,581.9	8,745.6	8,840.1
Resident Labour Force	3,699.7	3,886.9	4,069.4	4,278.7	4,384.5	4,414.9	4,419.8

Table 3: Summary of Household Projection for Greater London (thousands)

	2001	2006	2011	2016	2021	2026	2031
One person households: Male	488.8	561.2	624.5	694.9	756.1	809.5	852.2
One person households: Female	582.0	626.9	674.7	731.6	781.6	826.3	859.1
One family and no others: Couple: No dependent children	587.9	582.8	580.0	586.8	588.9	597.4	605.4
One family and no others: Couple: 1 dependent child	149.8	141.6	140.6	142.9	144.9	144.6	143.4
One family and no others: Couple: 2 dependent children	193.7	182.6	177.9	175.6	173.0	168.6	163.6
One family and no others: Couple: 3+ dependent children	100.9	98.9	99.8	101.4	103.3	104.4	104.5
One family and no others: Lone parent: 1 dependent child	105.1	117.0	131.7	149.1	164.0	172.5	177.2
One family and no others: Lone parent: 2 dependent children	63.2	68.1	73.4	80.8	87.3	90.2	90.2
One family and no others: Lone parent: 3+ dependent children	35.0	38.4	41.5	46.3	50.8	53.0	53.0
A couple and one or more other adults: No dependent children	216.2	212.3	209.8	212.1	214.4	218.2	223.3
A couple and one or more other adults: 1 dependent child	69.6	66.6	68.6	72.7	76.2	77.4	78.2
A couple and one or more other adults: 2 dependent children	37.6	37.7	39.8	42.5	44.8	45.9	46.8
A couple and one or more other adults: 3+ dependent children	21.7	23.0	25.5	28.4	31.1	33.2	35.2
A lone parent and one or more other adults: 1 dependent child	38.6	43.6	49.6	56.0	61.1	63.6	65.0
A lone parent and one or more other adults: 2 dependent children	16.8	20.1	23.4	27.2	30.7	32.8	33.8
A lone parent and one or more other adults: 3+ dependent children	9.1	10.8	12.3	14.3	16.2	17.2	17.6
Other households	320.5	320.7	322.9	330.5	331.7	328.1	325.9
Total	3,036.5	3,152.2	3,296.1	3,493.1	3,656.1	3,783.2	3,874.7
	2001	2006	2011	2016	2021	2026	2031
Couples	1,377.4	1,345.5	1,342.1	1,362.4	1,376.6	1,389.9	1,400.4
Lone Parents	267.8	297.9	331.9	373.7	410.1	429.4	436.9
One Person	1,070.8	1,188.1	1,299.2	1,426.4	1,537.7	1,635.8	1,711.4
Other	320.5	320.7	322.9	330.5	331.7	328.1	325.9
Total	3,036.5	3,152.2	3,296.1	3,493.1	3,656.1	3,783.2	3,874.7
	2001	2006	2011	2016	2021	2026	2031
Family: No dependent children	804.1	795.1	789.8	798.8	803.2	815.7	828.7
Family: 1 dependent child	363.1	368.7	390.5	420.8	446.3	458.1	463.8
Family: 2 dependent children	311.3	308.4	314.5	326.2	335.8	337.6	334.5
Family: 3+ dependent children	166.8	171.1	179.2	190.3	201.3	207.9	210.4
All Families	1,645.3	1,643.4	1,674.0	1,736.2	1,786.7	1,819.3	1,837.4

Chart 1: Population Age Structure 2011 and 2031, Greater London



Between 2011 and 2031 the growth in population is seen at all ages except for a small decline for persons aged between 26 and 31. The changes demonstrate a distinct ageing pattern, particularly with an increase of over 211 thousand persons between ages 45 and 64, as well as a significant increase in the child population, with 176 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 38 per cent, or 350 thousand, to reach 1.27 million by 2031. The population of over 90s in 2031 will be two and a half times higher than in 2011, reaching 140 thousand.

Table 4: Projected Resident Labour Force aged 16-74, Greater London (thousands)

	2001	2006	2011	2016	2021	2026	2031
Persons	3,699.7	3,886.9	4,069.4	4,278.7	4,384.5	4,414.9	4,419.8
Males	2,038.8	2,103.8	2,173.5	2,257.7	2,293.0	2,304.9	2,302.1
Females	1,660.9	1,783.1	1,895.9	2,021.1	2,091.5	2,109.9	2,117.7
% Female	44.9	45.9	46.6	47.2	47.7	47.8	47.9

The resident labour force has been projected using the same borough level age-specific economic activity rates as in the GLA 2009 round of projections. These are based on borough 2001 Census rates and are improved until 2020 according to the ONS UK projections, after which the 2020 borough rates are held constant. Between 2011 and 2031 there is a 350 thousand increase in the resident labour force aged 16-74, equivalent to 9 per cent. The female contribution to the labour force rises by 222 thousand and is 63 per cent of the total growth.

Annex: Borough Results

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

	2001	2006	2011	2016	2021	2026	2031
Camden	202.8	204.4	213.2	220.0	224.9	228.9	233.0
Kensington & Chelsea	161.1	167.1	172.2	176.2	183.3	184.7	184.7
Westminster, City of	202.9	211.4	221.1	231.4	236.5	238.6	241.3
City of London	7.3	8.9	9.7	10.4	11.5	12.1	12.8
Central boroughs	574.2	591.7	616.2	638.1	656.1	664.3	671.7
Hackney	207.8	218.6	234.2	248.9	257.9	264.2	268.9
Hammersmith & Fulham	169.5	176.6	183.2	191.0	197.7	201.9	204.6
Haringey	223.0	231.3	239.2	252.5	256.2	257.6	260.6
Islington	179.9	189.7	211.9	227.0	237.4	247.5	256.1
Lambeth	274.6	287.1	303.5	319.9	332.0	344.4	354.6
Lewisham	254.8	264.7	274.9	292.0	299.7	306.2	312.2
Newham	251.2	260.4	268.9	299.2	318.2	323.6	326.3
Southwark	258.1	268.2	288.8	312.1	334.1	342.9	351.7
Tower Hamlets	202.1	222.0	254.2	283.8	312.4	326.1	331.5
Wandsworth	272.2	284.0	303.2	317.8	333.3	344.1	349.1
Rest of Inner boroughs	2,293.1	2,402.5	2,562.0	2,744.4	2,878.9	2,958.6	3,015.6
Inner London	2,867.3	2,994.3	3,178.2	3,382.5	3,535.0	3,622.9	3,687.4
Barking & Dagenham	165.3	169.8	179.4	199.5	213.1	221.5	226.6
Barnet	319.8	325.3	334.2	375.4	384.0	398.6	401.2
Bexley	219.1	218.9	220.2	222.0	224.5	227.4	229.6
Brent	271.3	275.4	283.0	296.4	303.5	305.8	305.2
Bromley	295.6	300.7	306.4	312.9	316.6	317.8	318.3
Croydon	335.5	335.8	347.0	360.7	368.9	374.0	379.8
Ealing	308.4	311.7	322.0	333.4	339.7	346.7	349.7
Enfield	278.2	289.2	296.3	300.1	303.5	304.7	303.0
Greenwich	217.3	231.5	241.4	272.8	296.2	308.6	308.6
Harrow	210.7	217.0	223.8	229.0	229.9	231.3	233.8
Havering	224.8	229.2	234.5	247.2	261.6	267.7	270.6
Hillingdon	246.1	249.5	265.9	276.2	279.5	283.3	285.0
Hounslow	217.1	223.5	239.7	244.1	246.7	249.1	249.8
Kingston upon Thames	149.1	152.8	157.1	162.6	165.7	167.5	168.4
Merton	191.0	195.7	200.7	204.3	205.4	206.3	207.7
Redbridge	242.2	249.2	261.2	270.2	274.6	275.2	275.5
Richmond upon Thames	174.1	182.7	188.5	192.4	193.7	194.0	193.9
Sutton	181.4	183.6	188.0	189.6	189.7	190.0	189.8
Waltham Forest	222.8	224.0	232.7	243.8	249.9	253.5	256.3
Outer London	4,469.6	4,565.6	4,722.3	4,932.5	5,046.8	5,122.7	5,152.7
Greater London	7,336.9	7,559.9	7,900.5	8,314.9	8,581.9	8,745.6	8,840.1

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

	2001	2006	2011	2016	2021	2026	2031
Camden	91.7	94.1	98.3	102.4	106.1	109.6	112.5
Kensington & Chelsea	79.3	81.7	83.5	85.4	89.5	91.2	91.9
Westminster, City of	100.0	103.7	107.4	112.5	116.1	118.8	121.3
City of London	4.3	4.9	5.3	5.7	6.4	6.9	7.3
Central boroughs	275.4	284.5	294.6	306.0	318.1	326.4	333.1
Hackney	86.0	91.0	97.8	104.7	110.1	115.0	118.6
Hammersmith & Fulham	75.6	77.4	79.1	82.0	85.6	88.6	90.5
Haringey	92.2	96.1	99.7	106.0	108.9	111.0	113.4
Islington	82.3	86.4	95.7	103.0	109.0	115.2	120.4
Lambeth	118.7	124.0	130.7	138.3	145.3	153.2	159.9
Lewisham	107.6	112.4	116.6	124.4	129.0	133.5	137.6
Newham	91.6	97.9	103.4	118.1	129.2	134.3	137.4
Southwark	109.2	114.0	122.4	133.2	144.5	150.6	156.6
Tower Hamlets	78.7	88.7	103.5	117.8	133.4	143.5	149.1
Wandsworth	119.4	122.5	127.9	133.5	141.4	148.1	151.8
Rest of Inner boroughs	961.3	1,010.3	1,076.7	1,161.1	1,236.4	1,292.9	1,335.3
Inner London	1,236.7	1,294.8	1,371.4	1,467.1	1,554.6	1,619.2	1,668.3
Barking & Dagenham	67.2	70.0	73.7	82.4	89.1	93.9	97.7
Barnet	127.0	130.4	134.1	151.6	157.4	165.9	169.5
Bexley	89.7	90.7	91.9	93.5	95.5	97.7	99.7
Brent	100.3	104.3	108.4	114.7	119.5	122.6	124.2
Bromley	126.2	128.8	131.5	135.3	138.4	140.4	142.1
Croydon	139.1	142.6	149.3	157.9	164.5	169.6	174.8
Ealing	118.1	121.1	124.9	129.9	134.2	139.2	142.4
Enfield	111.1	116.2	120.0	123.0	126.3	128.9	130.1
Greenwich	93.0	100.6	105.1	119.5	131.4	138.8	141.0
Harrow	79.5	82.2	85.1	87.7	89.4	91.5	93.9
Havering	91.9	93.7	96.3	102.3	109.4	112.8	115.0
Hillingdon	96.8	99.1	105.3	109.6	112.0	115.0	117.2
Hounslow	84.1	87.6	93.5	96.0	98.6	101.3	103.1
Kingston upon Thames	61.5	63.5	64.9	67.1	69.0	70.6	71.9
Merton	79.1	81.9	84.1	86.2	87.9	89.7	91.6
Redbridge	92.5	95.9	100.6	105.1	108.5	110.4	111.9
Richmond upon Thames	76.3	78.5	80.1	81.7	82.9	83.8	84.7
Sutton	76.5	78.7	81.2	82.8	83.9	85.1	86.1
Waltham Forest	89.9	91.6	94.8	99.8	103.6	106.8	109.7
Outer London	1,799.9	1,857.4	1,924.7	2,026.0	2,101.6	2,164.0	2,206.4
Greater London	3,036.6	3,152.2	3,296.1	3,493.1	3,656.2	3,783.2	3,874.7

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

	2001	2006	2011	2016	2021	2026	2031
Camden	104.1	106.6	111.6	115.4	117.8	118.4	119.2
Kensington & Chelsea	84.7	87.0	88.4	90.0	93.8	93.3	92.3
Westminster, City of	109.7	113.8	117.5	122.6	124.8	124.4	124.4
City of London	4.7	5.6	6.0	6.3	7.0	7.3	7.6
Central boroughs	303.2	312.9	323.5	334.4	343.4	343.5	343.5
Hackney	94.3	103.9	113.7	121.7	126.0	127.8	129.0
Hammersmith & Fulham	93.7	98.2	102.0	106.7	110.5	112.1	112.9
Haringey	110.6	119.6	124.7	132.6	134.2	133.9	134.8
Islington	91.6	100.4	115.3	124.4	129.9	134.1	137.8
Lambeth	151.0	160.3	171.2	181.4	187.6	192.8	196.8
Lewisham	130.7	142.3	149.4	159.4	162.3	164.2	166.3
Newham	104.5	118.1	124.4	140.8	149.6	150.9	151.7
Southwark	128.4	138.6	152.0	165.7	177.1	179.5	182.5
Tower Hamlets	88.9	104.8	124.5	140.7	155.2	160.2	161.3
Wandsworth	159.3	165.9	176.5	184.4	192.7	197.2	198.7
Rest of Inner boroughs	1,153.1	1,252.1	1,353.6	1,457.7	1,525.1	1,552.7	1,571.6
Inner London	1,456.3	1,565.0	1,677.1	1,792.1	1,868.5	1,896.2	1,915.1
Barking & Dagenham	73.0	78.3	83.4	93.2	98.6	101.5	103.3
Barnet	159.0	163.9	167.8	190.1	192.3	197.2	196.3
Bexley	108.9	111.6	113.3	113.8	114.0	114.1	114.3
Brent	135.5	135.4	136.4	142.0	144.1	142.9	140.5
Bromley	148.1	154.2	158.4	161.9	162.4	160.7	159.3
Croydon	170.8	173.5	179.8	186.4	188.3	188.0	188.6
Ealing	159.3	159.6	161.7	165.7	166.9	167.9	167.2
Enfield	133.5	142.1	145.2	146.1	146.6	145.3	142.7
Greenwich	103.6	113.0	117.0	133.0	143.4	147.2	145.0
Harrow	105.8	111.8	114.7	116.1	115.1	114.2	114.4
Havering	109.4	116.2	121.2	128.7	135.6	137.3	138.4
Hillingdon	124.9	129.0	138.4	142.7	142.5	142.6	142.0
Hounslow	112.8	116.3	123.4	123.7	123.6	123.2	121.9
Kingston upon Thames	79.8	83.0	84.5	86.7	87.3	86.7	86.0
Merton	102.8	104.3	104.8	105.3	104.6	103.4	102.6
Redbridge	116.0	122.4	128.6	132.1	132.7	131.3	130.3
Richmond upon Thames	94.8	99.0	100.2	101.0	100.2	98.7	97.3
Sutton	95.4	98.6	101.1	101.1	99.4	97.9	96.5
Waltham Forest	109.9	109.6	112.4	116.9	118.5	118.5	118.2
Outer London	2,243.4	2,321.9	2,392.4	2,486.6	2,516.0	2,518.7	2,504.7
Greater London	3,699.7	3,886.9	4,069.4	4,278.7	4,384.5	4,414.9	4,419.8

Availability of Data

The projections are available in detail on the London Datastore:

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

The following tables for all years 2001 to 2031 are available:

Borough populations by single years of age and gender
Borough economically active populations by age groups and gender
Ward populations by five year age groups and gender

Details of borough household projections and ward populations by single years of age are available on request to:

demography@london.gov.uk

Projections of the ethnic group populations of boroughs are being prepared and will be available on the London Datastore following the publication of a *GLA Intelligence Update*.

Other borough and ward level projections are being prepared by the GLA. These will incorporate the same basic assumptions as the 2010 SHLAA projections but will use development data provided by the boroughs from their own latest housing trajectories.

It is likely that updated *London Plan* projections will be prepared once the Inspector's Report on the London Plan Examination in Public becomes available and its impact on the Plan assessed.

An *Intelligence Briefing* describing the new GLA demographic models will be published later in the year.