

GLA 2014 round of trend-based population projections – Results

June 2015

Key findings

- The GLA has released two sets of trend-based population projections based on short-term and longer-term migration trends. The volume and characteristics of migration flows varies between these projections.
- Based on the short-term migration scenario the total population of Greater London is projected to rise by 2.06 million between 2013 and 2036 to reach 10.49 million. In comparison the long-term migration scenario projects a rise of 1.61 million to reach 10.04 million by 2036.
- All boroughs are projected to see a rise in their population between 2011 and 2036 under both sets of projections. Under the short-term migration scenario, this proportional rise is projected to be greatest in Tower Hamlets (a rise of 46.3 per cent) and lowest in Kensington & Chelsea (4.03 per cent). For the long-term scenario, Redbridge (31.6 per cent) and Kensington & Chelsea (11.0 per cent) are projected to see the highest and lowest levels of growth respectively. City of London is excluded from these figures.

Introduction

This Intelligence Unit *Update* explores the GLA's 2014 round of borough level population projections. These were released in April 2015 and are the first to fully incorporate the results of the 2011 Census, with underlying migration data updated using commissioned origin-destination tables. As there is uncertainty about future migration caused in part by the influence of the financial crisis on recent patterns, projections based on both long- and short-term trends to inform assumptions about future migration patterns have been released.

The projections based on the two migration scenarios are referred to as the short-term and long-term variants. In each case, mortality and fertility methodologies are the same but the assumptions regarding migration differ. These are explained in further detail below:

- 1) **Short-term migration scenario:** This bases the volume of migration flows on estimates for the period mid-2009 to mid-2013. Age and sex characteristics for domestic flows are based on origin-destination data from the 2011 Census. These projections are intended to be used where accuracy in the near term is most important.
- 2) **Long-term migration scenario:** This bases the volume of migration flows on estimates for the period mid-2001 to mid-2013. Age and sex characteristics of domestic flows are based on a combination of origin-destination data from both the 2001 and 2011 Censuses. These projections are intended to be used for longer-term strategic planning purposes.

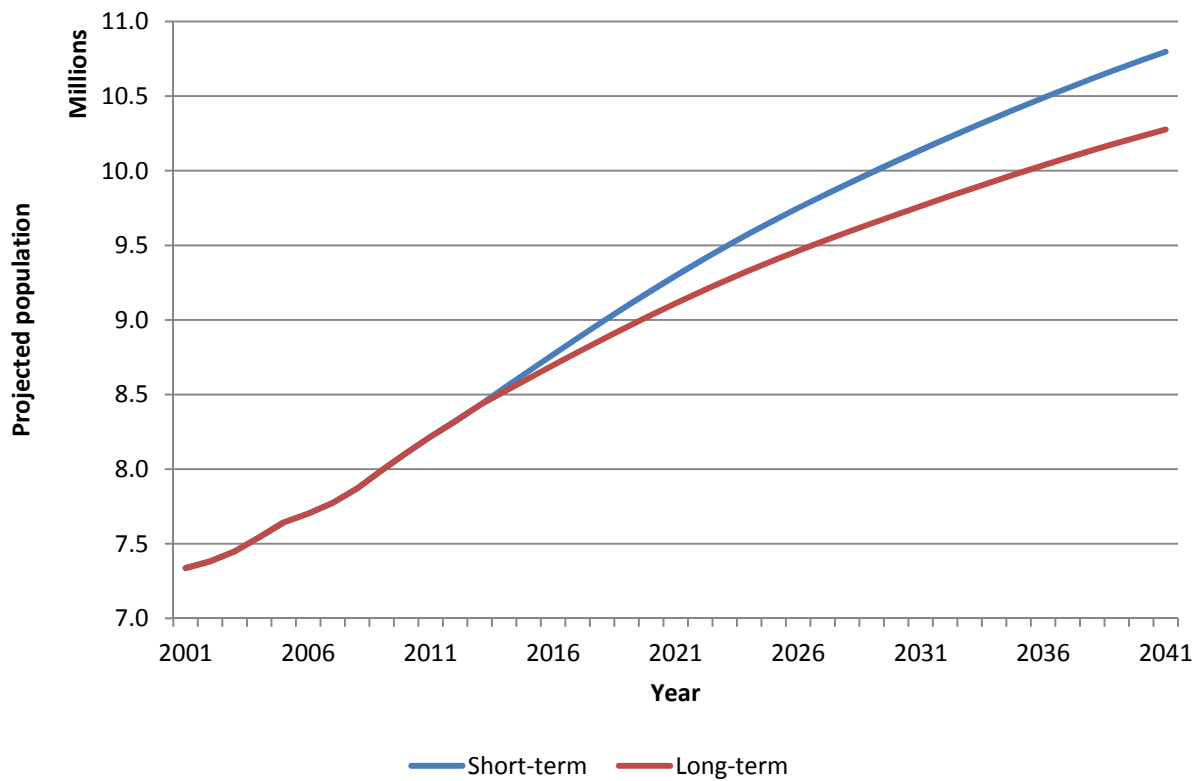
Results

The projections released by the GLA extend to 2041. However in this *Update* we will primarily discuss the results to 2036 as this corresponds with the period covered by the London Plan.

Total population – Greater London

Figure 1 shows that in the short-term scenario, the population of Greater London is projected to rise by 2.06 million between 2013 and 2036 to reach 10.49 million. Starting from the same 2013 base, the long-term scenario projects a much smaller rise of 1.61 million to 10.04 million by 2036. By 2036, the difference in population for Greater London between the two scenarios is over 452 thousand people.

Figure 1: Total population, Greater London, 2001-2041

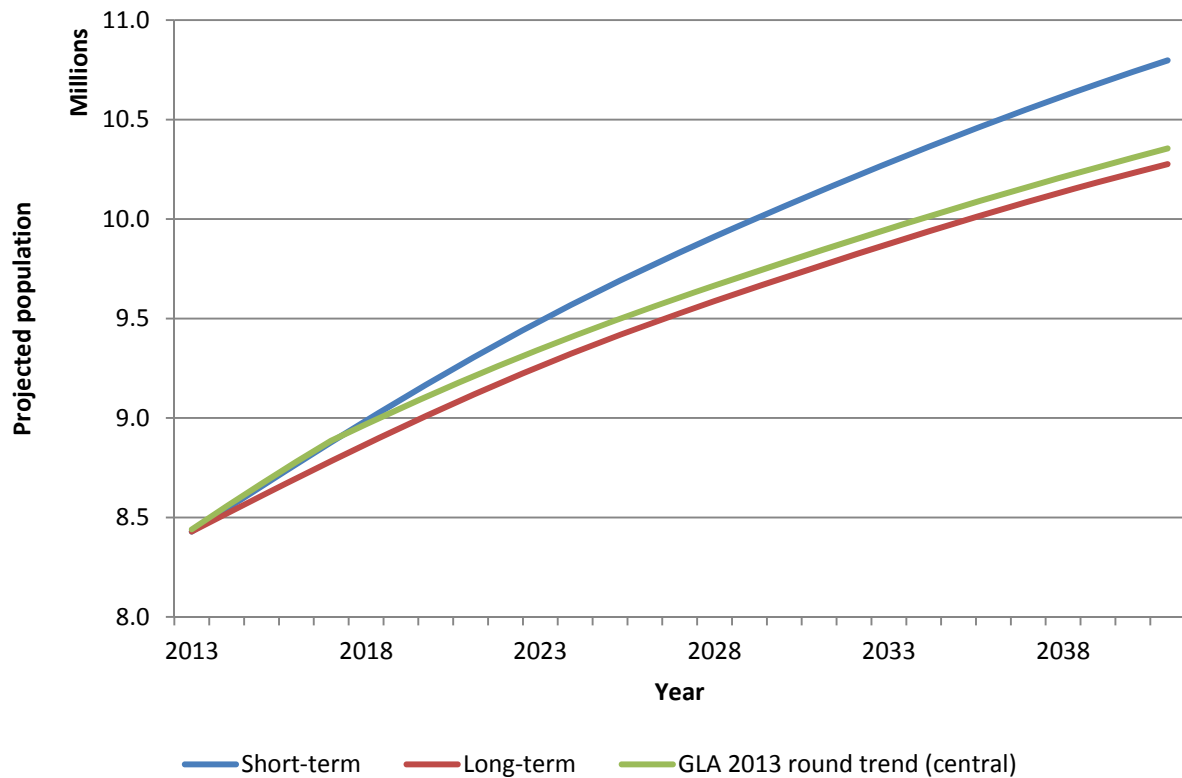


Source: GLA 2014 round of trend-based population projections

Comparison with 2013 round results

In the short-term (to 2017), the results of the 2013 round’s central variant projection closely follow those from the short-term migration scenario (Figure 2). Beyond 2017, the rate of annual growth more closely follows that of the 2014 round long-term projection.

Figure 2: Projected total population, Greater London, 2013-2041



Source: GLA 2013 round of trend-based population projections (central variant); GLA 2014 round of trend-based population projections

Table 1 provides a breakdown of estimated and projected population for Greater London by age group from 2001 to 2041 for both scenarios. The age groups are:

- 0-15 (children);
- 16-64 (working age population); and
- 65+ (retirement age).

London's total population is projected to rise by 25.1 per cent between 2013 and 2036 in the short-term migration variant and 19.6 per cent in the long-term variant.

Table 1 shows that even though a rise is projected in all age groups, the rise is not uniform. For example, the number of people age 65+ are projected to rise year on year in both scenarios – from 955 thousand in 2013, to 1.61 million by 2036 in the short-term migration scenario and 1.51 million in the long-term migration scenario. This equates to an increase of 654 thousand and 553 thousand respectively; a rise of 71.9 per cent or 60.7 per cent. This is the largest projected percentage rise of all three age groups.

The 0-15 age category is projected to grow overall by 16.7 per cent and 11.1 per cent respectively over the same period. The working age population (taken here to be those age 16 to 64) is also projected to rise between 2013 and 2036 by 20.0 per cent under the short-term migration scenario and 15.4 per cent for the long-term equivalent.

Table 1: Total population and population age groups, Greater London, 2001-2041

Year	Short-term			Long-term				
	Total Population	0-15	16-64	65+	Total Population	0-15	16-64	65+
2001	7,336,909	1,460,560	4,982,505	893,843	7,336,909	1,460,560	4,982,505	893,843
2002	7,381,870	1,465,222	5,027,541	889,107	7,381,870	1,465,222	5,027,541	889,107
2003	7,448,221	1,474,083	5,088,469	885,669	7,448,221	1,474,083	5,088,469	885,669
2004	7,542,613	1,488,061	5,169,084	885,467	7,542,613	1,488,061	5,169,084	885,467
2005	7,642,969	1,504,748	5,252,363	885,857	7,642,969	1,504,748	5,252,363	885,857
2006	7,701,603	1,513,704	5,308,489	879,410	7,701,603	1,513,704	5,308,489	879,410
2007	7,773,547	1,527,441	5,369,402	876,704	7,773,547	1,527,441	5,369,402	876,704
2008	7,869,882	1,548,227	5,440,482	881,174	7,869,882	1,548,227	5,440,482	881,174
2009	7,991,239	1,575,627	5,526,285	889,326	7,991,239	1,575,627	5,526,285	889,326
2010	8,107,073	1,603,359	5,604,431	899,283	8,107,073	1,603,359	5,604,431	899,283
2011	8,217,475	1,642,929	5,664,416	910,130	8,217,475	1,642,929	5,664,416	910,130
2012	8,320,793	1,670,822	5,715,036	934,936	8,320,793	1,668,086	5,718,789	933,918
2013	8,428,816	1,695,516	5,778,770	954,530	8,428,816	1,690,218	5,786,199	952,399
2014	8,543,587	1,720,110	5,851,051	972,426	8,519,233	1,708,819	5,843,114	967,300
2015	8,656,629	1,746,265	5,921,040	989,323	8,608,375	1,728,828	5,898,470	981,076
2016	8,768,378	1,773,513	5,989,207	1,005,657	8,696,558	1,750,008	5,952,379	994,170
2017	8,878,368	1,802,327	6,053,067	1,022,974	8,783,298	1,772,688	6,002,493	1,008,116
2018	8,986,406	1,832,750	6,112,136	1,041,520	8,868,370	1,797,021	6,048,140	1,023,209
2019	9,092,146	1,859,950	6,170,801	1,061,395	8,951,501	1,818,251	6,093,758	1,039,492
2020	9,195,449	1,884,813	6,228,156	1,082,480	9,032,571	1,837,416	6,138,291	1,056,864
2021	9,295,973	1,905,924	6,283,809	1,106,239	9,111,286	1,853,156	6,181,372	1,076,758
2022	9,393,461	1,922,074	6,340,260	1,131,127	9,187,380	1,864,257	6,225,447	1,097,675
2023	9,487,728	1,934,403	6,394,768	1,158,557	9,260,679	1,871,994	6,267,793	1,120,891
2024	9,578,562	1,941,744	6,448,789	1,188,028	9,330,977	1,875,146	6,309,888	1,145,943
2025	9,666,005	1,948,378	6,497,878	1,219,749	9,398,367	1,877,852	6,347,439	1,173,076
2026	9,750,334	1,952,193	6,545,238	1,252,903	9,463,250	1,878,127	6,383,654	1,201,469
2027	9,831,989	1,953,917	6,591,023	1,287,049	9,526,061	1,876,677	6,418,640	1,230,743
2028	9,911,331	1,953,963	6,634,005	1,323,363	9,587,165	1,873,877	6,451,299	1,261,990
2029	9,988,665	1,956,140	6,671,466	1,361,059	9,646,855	1,873,359	6,479,031	1,294,466
2030	10,064,195	1,959,950	6,705,367	1,398,879	9,705,324	1,874,518	6,503,867	1,326,939
2031	10,138,234	1,962,728	6,738,894	1,436,612	9,762,807	1,874,884	6,528,649	1,359,274
2032	10,210,981	1,964,710	6,772,914	1,473,356	9,819,390	1,874,674	6,554,084	1,390,633
2033	10,282,523	1,966,171	6,807,654	1,508,698	9,875,140	1,874,136	6,580,337	1,420,666
2034	10,352,770	1,967,398	6,842,370	1,543,002	9,929,992	1,873,525	6,606,834	1,449,633
2035	10,421,571	1,968,663	6,877,103	1,575,805	9,983,767	1,873,077	6,633,470	1,477,220
2036	10,488,895	1,970,210	6,909,771	1,608,913	10,036,374	1,872,997	6,658,325	1,505,052
2037	10,554,601	1,972,219	6,942,148	1,640,235	10,087,706	1,873,434	6,683,079	1,531,194
2038	10,618,002	1,974,790	6,973,834	1,669,378	10,137,122	1,874,461	6,707,420	1,555,240
2039	10,679,414	1,977,980	7,004,815	1,696,619	10,184,903	1,876,118	6,731,205	1,577,579
2040	10,739,055	1,981,852	7,033,524	1,723,680	10,231,253	1,878,452	6,753,043	1,599,759
2041	10,797,114	1,986,423	7,060,445	1,750,246	10,276,352	1,881,473	6,773,408	1,621,471

Source: GLA 2014 round of trend-based population projections

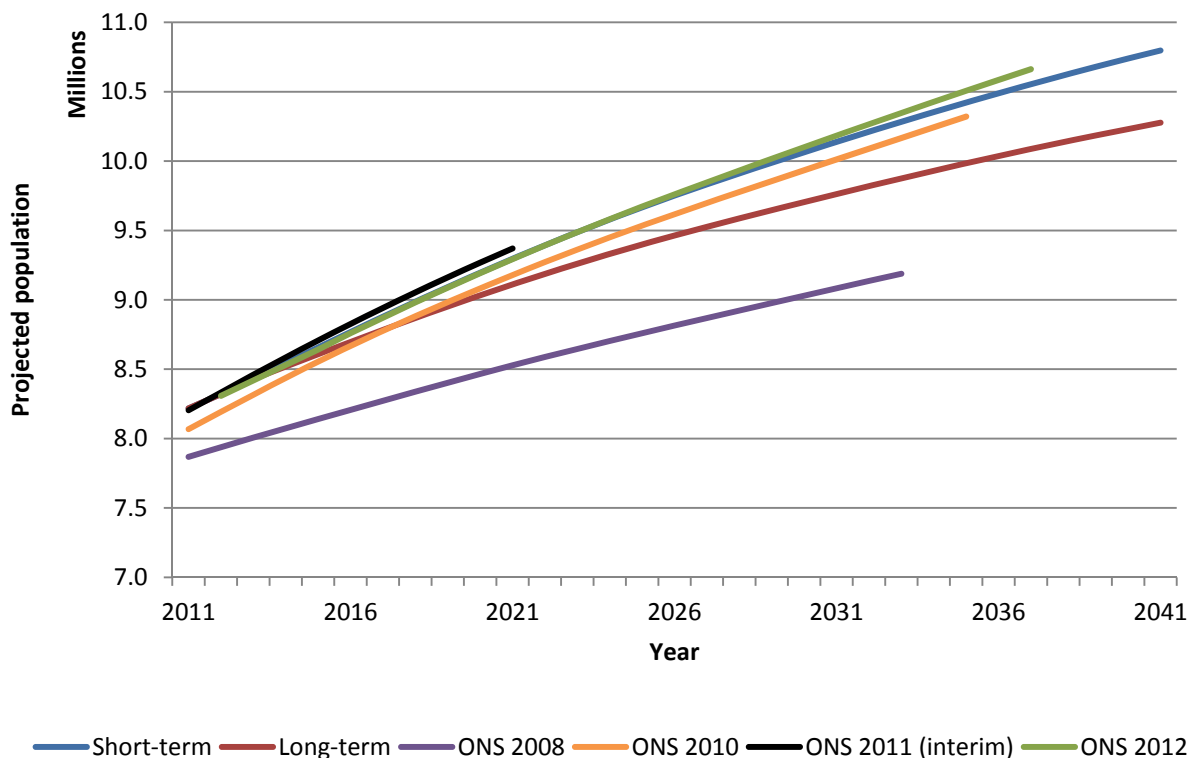
Comparison with ONS projections

The GLA population projections can be compared with those released by ONS as part of their biennial Sub-national Population Projections (SNPP). The most recent release of projections was the 2012-based SNPP released in May 2014 which replaces the 2011-based interim SNPP released in September 2012. The 2012-based SNPP are based on the 2012 mid-year population estimates.

The ONS projections are based on a broadly similar methodology to the GLA's. Both use a cohort component model and project forward according to recent trends in fertility, mortality and migration. A single projection is produced with no variants and this uses the assumption that recent patterns (five years for domestic flows, six years for international) of migration will persist for the duration of the projection period. One significant methodological difference is that the sum of ONS's subnational projections for all authorities in England and Wales are constrained to be consistent with the results of the equivalent round of their National Population Projections (NPP).

Figure 3 shows the projected growth in London's population based on the ONS's 2008, 2010, 2011-based (interim) and 2012-based SNPP. It also includes both scenarios in the GLA's 2014 round of population projections. The ONS 2012-based SNPP shows a similar level of growth to 2027 as the GLA's population projections produced using the short-term migration scenario. On the other hand, the GLA's projections that take into account the long-term migration scenario result in much lower levels of growth than all projections except the 2008-based SNPP.

Figure 3: Comparison of GLA and ONS projections, Greater London, 2011-2041



Source: GLA 2014 round of trend-based population projections; ONS 2008-based SNPP; ONS 2010-based SNPP; ONS 2011-based SNPP (interim); ONS 2012-based SNPP

The ONS 2011-based interim SNPP only cover the period to 2021 but project the highest level of growth between 2013 and 2021 of 911 thousand with London's population projected to reach 9.37 million in 2021. The ONS 2012-based SNPP projects the second highest level of growth over this period of 875 thousand reaching a total population of 9.29 million in 2021.

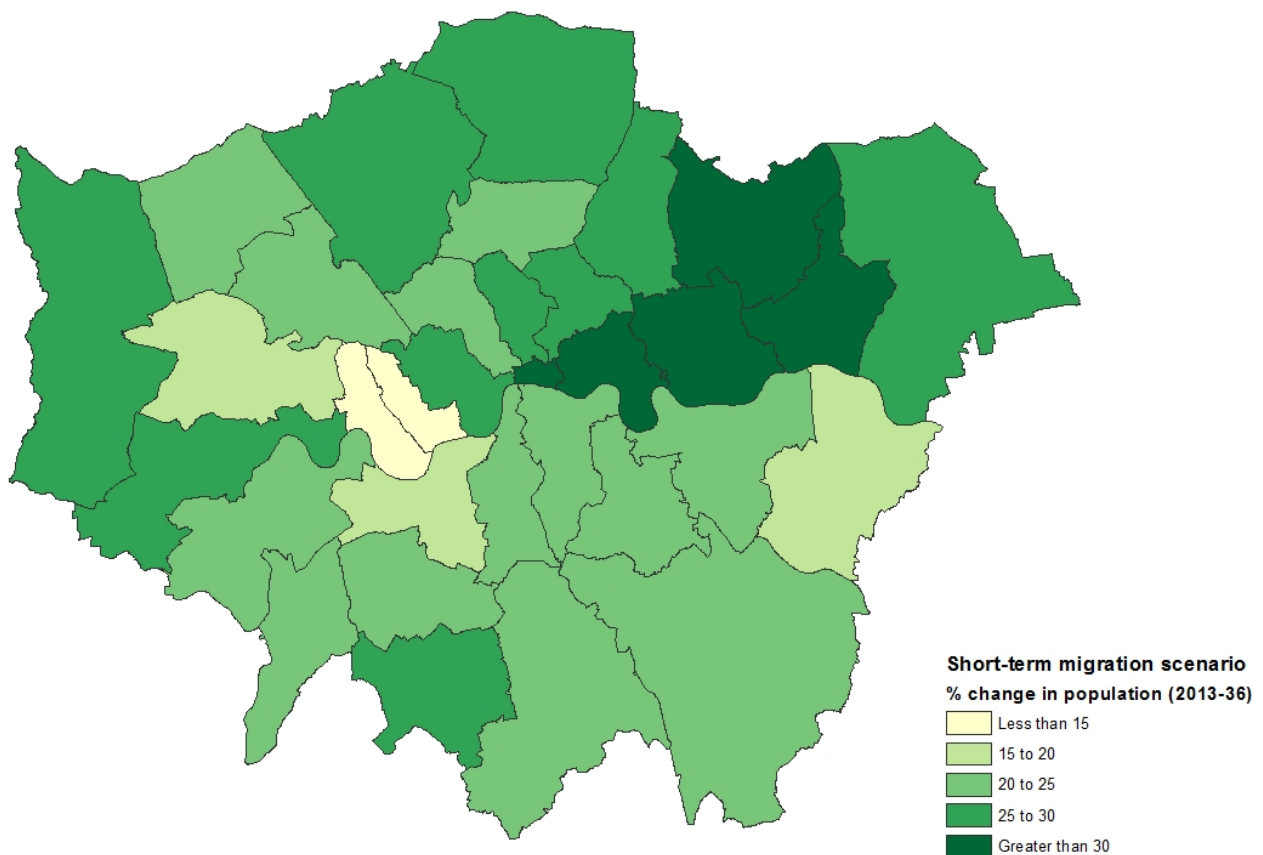
Over the longer term between 2013 and 2036, the ONS 2012-based SNPP projects the greatest growth; 2.17 million or 25.7 per cent. This is followed by the GLA's population projections that use the short-term migration scenario which project an increase of 2.06 million, equivalent to a 24.5 per cent rise.

Total population – Borough level

Table 2 gives the projected population figures for London boroughs and borough groupings based on the short-term migration scenario. All boroughs are projected to see a rise in their population between 2011 and 2036. Figure 4 shows the projected percentage change in population between 2036 and the most recent estimate (2013). Comparing 2011 and 2036, the greatest growth is projected in the east – the City of London is projected to see its total population increase by more than 50 per cent whilst both Tower Hamlets and Barking & Dagenham are projected to see their populations grow by 46.3 per cent and 45.2 per cent respectively. Nine other boroughs are projected to have a rise in their population of more than 30 per cent.

The lowest level of growth is projected in Kensington & Chelsea (4.0 per cent). Hammersmith & Fulham, and Wandsworth are the only other two boroughs projected to see an increase of less than 20 per cent. Overall, the Central London boroughs are projected to see lower levels of growth than elsewhere in London; 23.6 per cent compared to 27.8 per cent in Outer London and 28.3 per cent in the remaining Inner London boroughs. For London as a whole, the population is projected to rise by 27.6 per cent.

Figure 4: Projected change in population, borough, 2013-2036 (short-term migration scenario)



Source: GLA 2014 round of trend-based population projections

Table 2: Population, boroughs and borough groups, 2011-2041 (short-term)

Year	2001	2006	2011	2016	2021	2026	2031	2036	2041
Camden	202,820	205,199	220,087	240,771	254,593	265,865	276,199	284,977	292,310
Kensington & Chelsea	161,143	163,427	158,652	155,920	157,849	160,139	162,549	165,040	167,338
Westminster	202,898	211,312	219,582	238,858	255,605	268,630	278,798	287,469	294,599
City of London	7,338	7,343	7,412	8,449	9,450	10,234	10,891	11,432	11,912
Central boroughs	574,199	587,280	605,733	643,999	677,497	704,868	728,437	748,918	766,159
Hackney	207,847	228,488	247,578	269,058	286,380	300,640	313,189	325,302	336,003
Hammersmith & Fulham	169,456	178,143	182,790	183,079	189,371	194,346	198,960	203,526	207,459
Haringey	222,998	237,637	256,438	274,300	289,794	303,070	314,637	325,382	334,768
Islington	179,857	185,682	206,639	228,408	244,107	256,168	266,793	276,446	284,324
Lambeth	274,584	289,834	304,808	325,734	342,268	354,658	366,055	377,971	388,136
Lewisham	254,811	263,937	277,525	297,700	314,900	329,721	342,277	353,680	363,998
Newham	251,220	275,113	311,912	338,560	364,794	386,096	404,287	420,477	434,114
Southwark	258,087	265,715	289,361	310,460	327,175	340,894	353,039	364,240	373,781
Tower Hamlets	202,068	220,904	256,685	293,428	320,683	341,757	359,908	375,552	388,289
Wandsworth	272,171	292,783	308,300	321,308	335,913	346,819	356,080	366,087	375,007
Rest of Inner boroughs	2,293,099	2,438,236	2,642,035	2,842,036	3,015,385	3,154,169	3,275,225	3,388,662	3,485,879
Inner boroughs	2,867,298	3,025,516	3,247,768	3,486,035	3,692,882	3,859,037	4,003,662	4,137,580	4,252,038
Barking & Dagenham	165,279	168,712	187,418	207,163	227,024	244,622	259,337	272,175	283,518
Barnet	319,812	333,284	357,653	386,530	414,192	438,256	458,419	476,410	492,258
Bexley	219,054	224,178	233,002	242,482	252,675	262,866	272,079	280,587	288,484
Brent	271,290	293,370	313,084	328,751	345,425	359,678	371,620	382,480	392,059
Bromley	295,575	298,052	311,110	327,755	344,846	361,278	375,053	387,597	399,261
Croydon	335,479	348,653	364,815	384,812	405,490	424,151	439,328	453,091	465,597
Ealing	308,398	324,626	339,665	353,218	370,312	385,043	397,321	408,570	418,632
Enfield	278,240	291,954	314,011	333,244	354,055	372,800	389,078	403,854	417,135
Greenwich	217,252	246,058	255,483	273,436	289,026	302,847	314,769	325,389	334,944
Harrow	210,717	226,844	241,063	252,818	267,795	281,155	292,075	301,532	309,982
Havering	224,824	227,996	238,281	249,507	263,056	277,340	291,027	304,047	316,218
Hillingdon	246,117	255,937	276,134	300,781	320,609	338,415	353,949	367,018	378,305
Hounslow	217,051	232,878	255,334	276,184	296,078	312,488	325,433	336,472	346,091
Kingston upon Thames	149,074	148,524	160,469	172,860	181,918	189,921	196,895	202,720	207,567
Merton	191,012	188,401	201,226	210,803	222,403	232,286	239,993	247,001	253,399
Redbridge	242,157	259,712	281,521	302,047	325,268	346,785	365,240	381,626	396,228
Richmond upon Thames	174,093	180,260	187,527	198,499	209,836	219,528	226,895	233,087	238,576
Sutton	181,405	181,302	191,515	203,764	217,042	229,425	239,599	248,623	256,646
Waltham Forest	222,782	245,346	260,397	277,691	296,041	312,412	326,462	339,036	350,177
Outer boroughs	4,469,611	4,676,087	4,969,707	5,282,343	5,603,090	5,891,297	6,134,572	6,351,315	6,545,076
Greater London	7,336,909	7,701,603	8,217,475	8,768,378	9,295,973	9,750,334	10,138,234	10,488,895	10,797,114

Source: GLA 2014 round of trend-based population projection

Table 3 gives the equivalent data for London boroughs and borough groupings based on the long-term migration scenario. Overall this scenario projects less growth than the short-term equivalent with Greater London projected to see a rise of 22.1 per cent; over 5.5 percentage points less than under the short-term migration scenario.

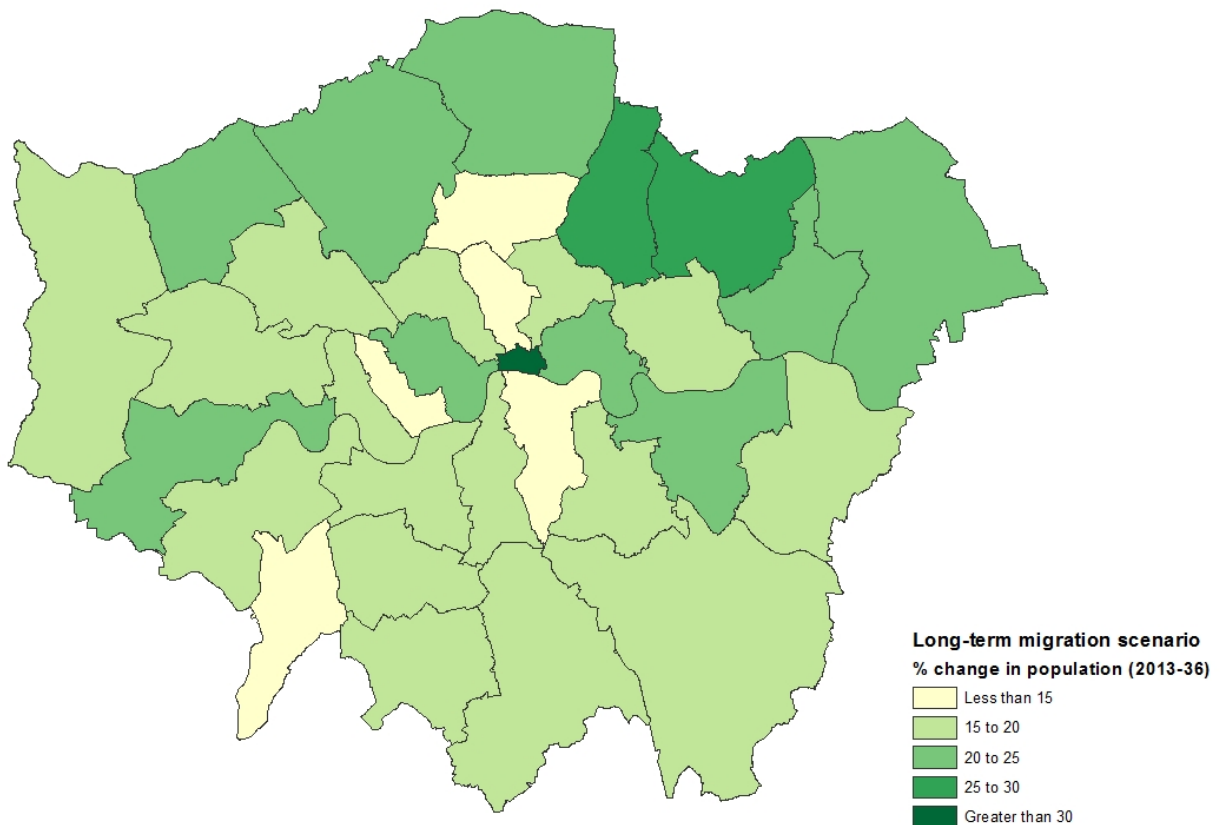
Once again the City of London is projected to see the greatest growth (46.1 per cent) between 2011 and 2036. This is followed by the eastern Outer London boroughs of Redbridge and Waltham Forest whose populations are projected to rise by 31.6 per cent and 29.0 per cent respectively.

Kensington & Chelsea is still set to see the lowest level of growth over the period of 11.0 per cent although this is nearly seven percentage points higher than under the short-term migration scenario. Alongside Hammersmith & Fulham, Wandsworth, and Harrow, Kensington & Chelsea is one of the only four boroughs whose population is projected to grow more under the long-term migration scenario than the short-term migration scenario.

The population of the Central London boroughs and the remaining Inner London boroughs is projected to rise to 20.4 per cent and 20.6 per cent respectively whereas Outer London is projected to see the greatest rise in their population of 23.2 per cent.

Figure 5 illustrates the projected change in population (per cent) between the current mid-2013 estimate and 2036 under the long-term migration scenario.

Figure 5: Projected change in population, borough, 2013-2036 (long-term migration scenario)



Source: GLA 2014 round of trend-based population projections

Table 3: Population, boroughs and borough groups, 2011-2041 (long-term)

Year	2001	2006	2011	2016	2021	2026	2031	2036	2041
Camden	202,820	205,199	220,087	236,167	245,391	253,329	261,062	267,721	273,356
Kensington & Chelsea	161,143	163,427	158,652	159,991	165,192	169,242	172,806	176,031	178,741
Westminster	202,898	211,312	219,582	235,648	248,677	258,979	267,254	274,548	280,582
City of London	7,338	7,343	7,412	8,264	9,099	9,776	10,352	10,832	11,258
Central boroughs	574,199	587,280	605,733	640,070	668,358	691,326	711,475	729,132	743,938
Hackney	207,847	228,488	247,578	265,688	277,396	286,604	294,709	302,810	309,964
Hammersmith & Fulham	169,456	178,143	182,790	185,962	194,341	200,296	205,568	210,566	214,676
Haringey	222,998	237,637	256,438	270,523	280,168	288,328	295,586	302,729	309,043
Islington	179,857	185,682	206,639	219,596	225,874	231,190	236,559	241,997	246,546
Lambeth	274,584	289,834	304,808	323,377	336,635	346,318	355,488	365,447	373,906
Lewisham	254,811	263,937	277,525	295,719	309,477	321,088	330,896	339,924	348,136
Newham	251,220	275,113	311,912	330,819	346,634	359,626	371,078	381,695	390,710
Southwark	258,087	265,715	289,361	305,494	316,150	325,220	333,700	341,957	349,118
Tower Hamlets	202,068	220,904	256,685	282,815	297,796	309,868	320,755	330,521	338,620
Wandsworth	272,171	292,783	308,300	323,794	339,483	350,277	359,343	369,007	377,395
Rest of Inner boroughs	2,293,099	2,438,236	2,642,035	2,803,787	2,923,954	3,018,815	3,103,683	3,186,653	3,258,116
Inner boroughs	2,867,298	3,025,516	3,247,768	3,443,857	3,592,313	3,710,141	3,815,157	3,915,785	4,002,054
Barking & Dagenham	165,279	168,712	187,418	202,379	214,995	226,102	235,115	242,960	249,967
Barnet	319,812	333,284	357,653	381,441	401,509	418,818	433,169	446,166	457,693
Bexley	219,054	224,178	233,002	241,830	250,917	260,009	268,154	275,574	282,405
Brent	271,290	293,370	313,084	329,463	345,583	358,545	369,181	378,773	387,021
Bromley	295,575	298,052	311,110	325,530	339,099	352,215	362,999	372,866	382,131
Croydon	335,479	348,653	364,815	383,357	401,051	416,566	428,813	439,902	449,895
Ealing	308,398	324,626	339,665	354,758	371,915	385,762	397,182	407,608	416,678
Enfield	278,240	291,954	314,011	331,360	348,318	362,945	375,249	386,288	396,115
Greenwich	217,252	246,058	255,483	274,334	289,921	303,053	314,102	323,751	332,246
Harrow	210,717	226,844	241,063	253,880	269,715	283,349	294,351	303,720	311,871
Havering	224,824	227,996	238,281	248,641	260,314	272,414	283,792	294,455	304,289
Hillingdon	246,117	255,937	276,134	294,971	307,067	318,588	328,949	337,722	345,435
Hounslow	217,051	232,878	255,334	272,402	287,025	299,039	308,398	316,516	323,643
Kingston upon Thames	149,074	148,524	160,469	169,449	174,198	178,871	183,279	187,071	190,334
Merton	191,012	188,401	201,226	209,197	218,396	226,200	232,252	237,921	243,150
Redbridge	242,157	259,712	281,521	301,431	322,510	341,249	356,878	370,513	382,475
Richmond upon Thames	174,093	180,260	187,527	198,131	208,298	216,763	223,129	228,468	233,169
Sutton	181,405	181,302	191,515	201,385	211,126	220,336	227,708	234,306	240,247
Waltham Forest	222,782	245,346	260,397	278,758	297,018	312,284	324,949	336,008	345,535
Outer boroughs	4,469,611	4,676,087	4,969,707	5,252,700	5,518,974	5,753,108	5,947,650	6,120,589	6,274,299
Greater London	7,336,909	7,701,603	8,217,475	8,696,558	9,111,286	9,463,250	9,762,807	10,036,374	10,276,352

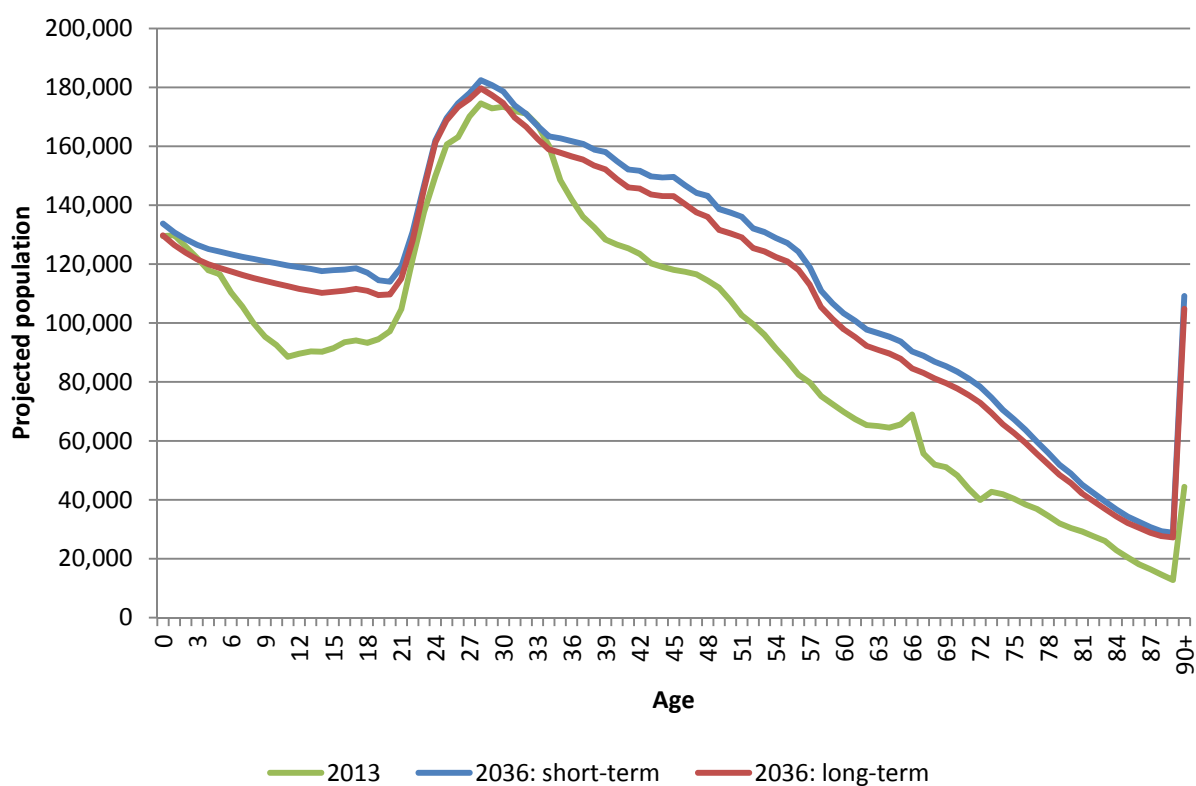
Source: GLA 2014 round of trend-based population projections

Age structure

Figure 6 shows estimated and projected age structures for Greater London for 2013 and 2036 for both migration scenarios. It illustrates that in each scenario, the population is projected to rise at almost all ages between 2013 and 2036. Large increases are projected among children over six years of age and all ages over 35.

Figure 7 shows the proportional changes in age structure for London compared to 2013 for the two different migration scenarios. The largest proportional increases can be seen in the older population, particularly those age 90 and over. The smallest projected change is amongst those in their twenties. The short-term migration scenario projects larger increases among all age groups, relative to the long-term variant.

Figure 6: Age structure, Greater London, 2013 and 2036



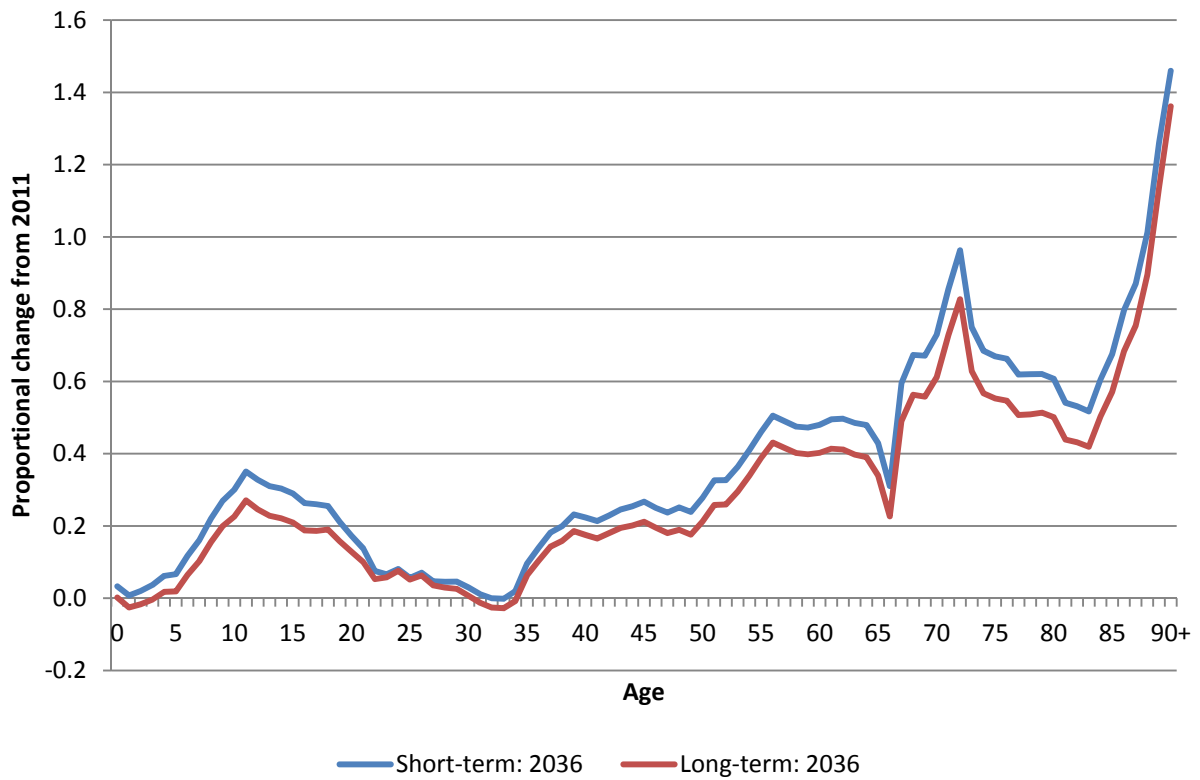
Source: GLA 2014 round of trend-based population projections

Some clear cohort effects are apparent in the data. For example, the 2013 age structure shows a dip in the number of people in their early seventies, corresponding with the lower number of births seen during the Second World War. This age group sees a correspondingly large proportional increase over the projection period (Figure 7).

The converse can be seen for the large cohorts of so-called baby boomers born post-war who in 2013 were in their mid-60s. These ages show a smaller proportional increase over time than adjacent cohorts (Figure 7).

The large proportional increase in the number of children age six and over is a result of the large increase in births over the previous decade feeding through to older ages.

Figure 7: Proportional change in age structure compared to 2013 Greater London



Source: GLA 2014 round of trend-based population projections

Components of population change

Births, deaths and migration all contribute to London’s changing population. Natural change, which is the difference between the number of births and deaths, is the largest contributor to London’s population growth.

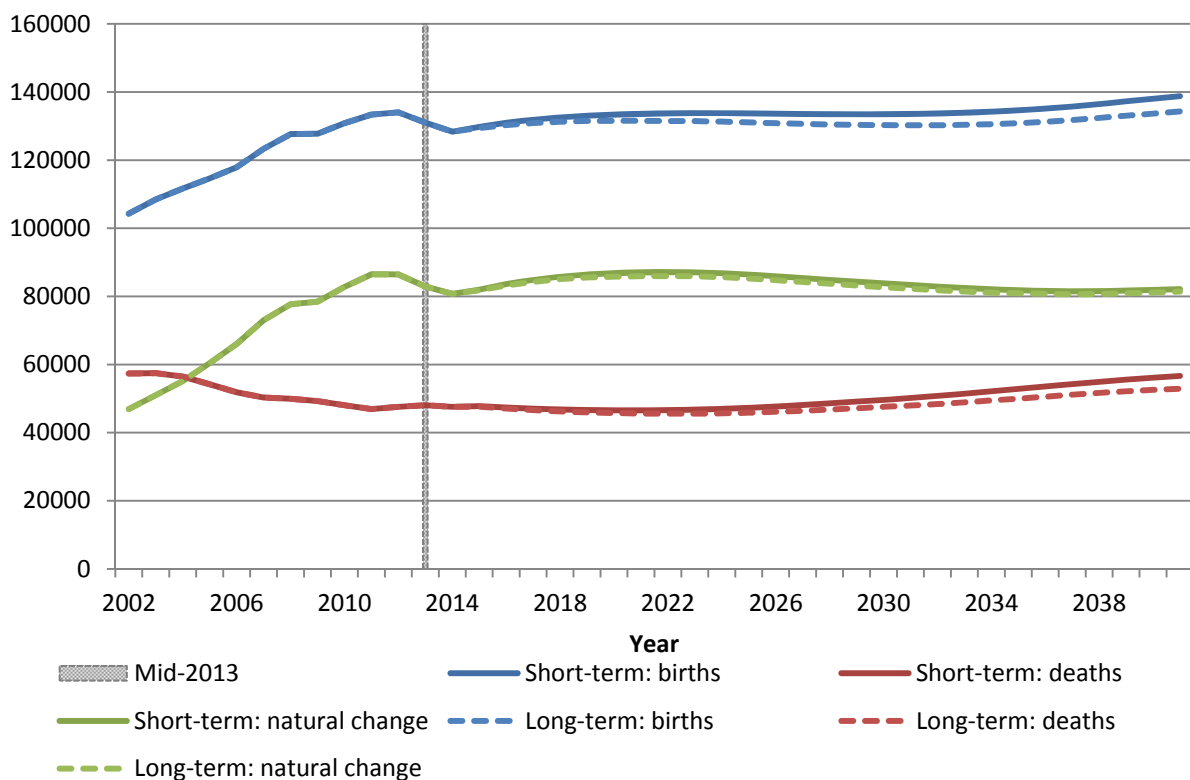
Births and deaths

Annual births in Greater London have risen by nearly 27 thousand between 2002 and 2013, while the number of annual deaths has fallen over the same period by over nine thousand. Natural change has correspondingly increased from 47 thousand to 83 thousand per year (Figure 9).

In spite of this overall growth in the number of births, London saw a drop in births in the year ending June 2013 of over three thousand when compared to the previous year. This is the first decrease observed since 2002.

Births are projected to continue to fall in 2014 before rising modestly over the projection period under both migration scenarios. Deaths are set to fall in the immediate future before rising, which contributes to the projected increase in natural change.

Figure 8: Births, deaths and natural change, Greater London, 2002-2041



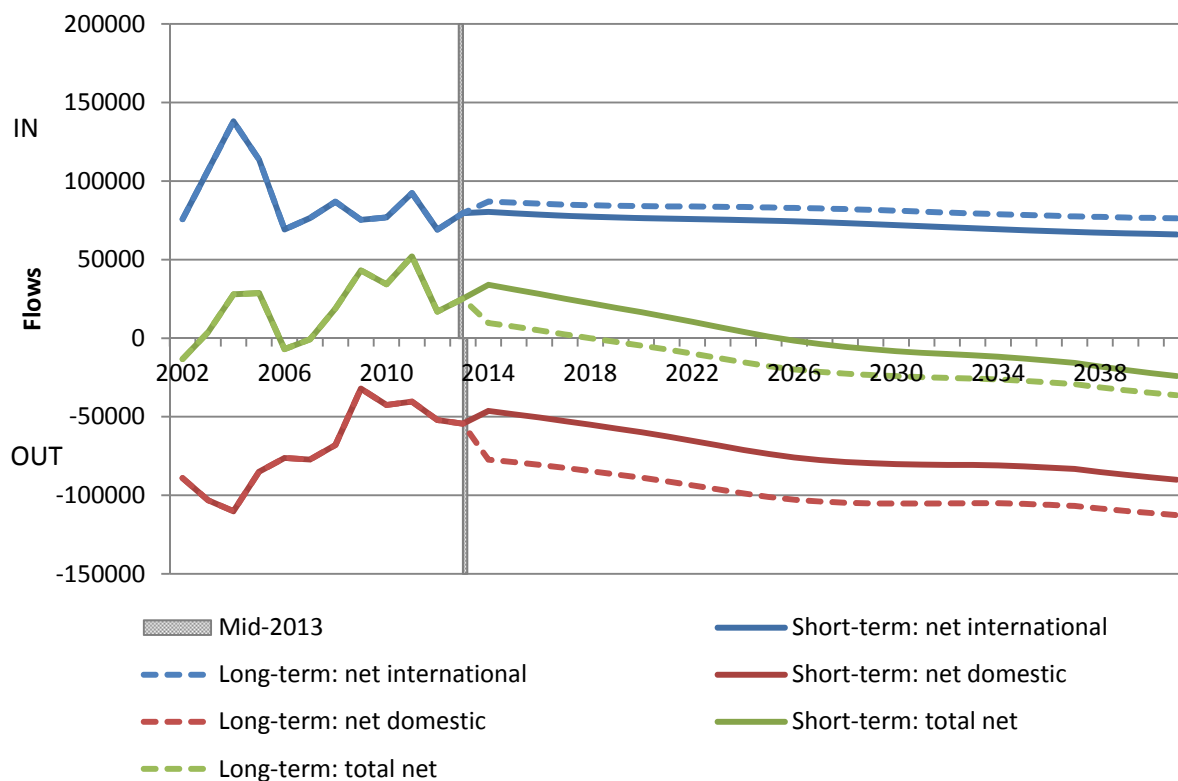
Source: GLA 2014 round of trend-based population projections

Migration

Net migration for Greater London in both migration scenarios can be seen in Figure 9. Net international migration has been positive between 2002 to 2013 indicating inflows from abroad have outnumbered outflows. The spike in the early 2000s which saw net international migration reaching nearly 138 thousand can be attributed to the enlargement of the European Union when ten new countries joined.

Net domestic out migration fell from a high of over 100 thousand per year in 2004 to around 30 thousand in 2009. The sharp change between 2008 and 2009 is widely attributed to the effect of the financial crisis - with fewer people leaving the capital for elsewhere in the UK.

Figure 9: Net migration flows, Greater London, 2002-2041



Source: GLA 2014 round of trend-based population projections

Net international migration under both migration scenarios is projected to rise in 2014 before gradually falling year on year for the remainder of the projection period.

Net domestic migration for the two different scenarios varies considerably. This is because both base the volume of migration flows on estimates from different periods; mid-2009 to mid-2013 for the short-term and mid-2001 to mid-2013 for the long-term. Under the short-term scenario, net domestic out-migration is projected to fall in the near future before rising over the remainder of the projection period to over 90 thousand. The long-term scenario however projects a different pattern with net domestic out-migration set to rise sharply next year to some 77 thousand (an increase of nearly 23 thousand) before continuing to grow at a slower rate to 2041 to reach over 112 thousand.

Table 4: Net domestic and net international migration, borough, 2013 and 2036

	2013		Short-term		Long-term	
			2036		2036	
	Net domestic	Net international	Net domestic	Net international	Net domestic	Net international
Camden	-1,719	4,744	-3,853	3,840	-1,639	1,328
Kensington & Chelsea	-1,265	-170	93	-268	-703	469
Westminster	-6,320	7,546	-3,744	4,014	-2,069	2,108
City of London	-191	193	-45	98	58	-9
Hackney	-222	2,021	-2,100	882	-4,936	3,176
Hammersmith & Fulham	-2,925	41	-142	-449	-1,746	1,052
Haringey	-3,473	4,860	-4,725	3,775	-6,537	5,074
Islington	-1,109	3,848	-3,366	3,151	-2,498	1,774
Lambeth	-2,709	3,267	-2,602	1,697	-4,635	3,415
Lewisham	-1,173	2,407	-2,805	1,747	-3,798	2,334
Newham	-7,985	7,151	-12,234	9,578	-12,544	9,297
Southwark	-2,229	3,541	-4,841	3,342	-5,452	3,618
Tower Hamlets	-913	7,013	-4,456	3,200	-5,115	3,290
Wandsworth	-1,596	102	-651	-974	-3,328	1,437
Barking & Dagenham	-245	1,403	-2,723	1,859	-3,059	1,580
Barnet	-1,712	3,912	-2,509	3,207	-3,178	3,018
Bexley	856	516	-111	667	-288	585
Brent	-4,905	4,021	-5,807	4,509	-8,320	6,566
Bromley	2,066	348	824	429	618	74
Croydon	-600	1,141	-1,517	1,304	-3,122	2,265
Ealing	-4,380	2,383	-3,434	2,513	-5,896	4,526
Enfield	-1,656	1,933	-2,649	2,339	-3,487	2,422
Greenwich	-852	1,818	-2,814	1,989	-4,154	3,002
Harrow	-2,337	1,153	-2,047	2,022	-2,657	2,394
Havering	1,484	271	1,236	361	851	242
Hillingdon	-275	2,833	-2,823	2,639	-2,744	1,953
Hounslow	-2,732	2,994	-3,995	3,190	-5,105	3,803
Kingston upon Thames	-37	1,827	-1,776	1,798	-791	505
Merton	-1,442	177	-1,214	493	-1,657	673
Redbridge	-1,294	2,049	-1,771	1,685	-2,640	1,944
Richmond upon Thames	513	139	-22	-109	-315	-60
Sutton	768	330	428	263	474	-210
Waltham Forest	-3,820	3,706	-4,221	3,327	-5,657	4,285
Greater London	-54,428	79,518	-82,418	68,116	-106,068	77,928

Source: GLA 2014 round of trend-based population projections

Life expectancy at birth

Estimated and projected life expectancy of males and females for all London boroughs for 2013 and 2036 can be seen in Table 5. In 2013, assumed male life expectancy at birth varied from 77.2 years in Barking & Dagenham to 82.8 for Harrow (discounting City of London, due to the small number of annual deaths). For women, life expectancy ranged from 81.5 years for Newham to 86.5 for Kensington & Chelsea (again discounting City of London).

By 2036 it is projected that life expectancy at birth in all boroughs for both males and females will have risen. For males, this is projected to be greater than 80 years for all boroughs. With females, the projected increase in life expectancy at birth sees this rise to greater than 90 years for eight boroughs (excluding the City of London).

Table 5: Life expectancy at birth, boroughs, 2013 and 2036

Year	2013		2036		Change 2013-2036	
	Male	Female	Male	Female	Male	Female
Camden	80.29	85.59	87.85	91.66	7.56	6.07
Kensington & Chelsea	81.40	86.49	87.59	92.50	6.18	6.01
Westminster	81.40	85.53	88.19	92.05	6.80	6.52
City of London	89.96	93.76	116.86	111.31	26.90	17.55
Hackney	78.39	82.58	86.41	88.44	8.02	5.86
Hammersmith & Fulham	79.18	83.23	84.86	88.35	5.68	5.12
Haringey	80.47	84.73	86.50	90.21	6.03	5.48
Islington	78.33	82.86	85.15	88.07	6.82	5.21
Lambeth	78.71	83.14	84.74	88.23	6.03	5.09
Lewisham	78.51	82.91	84.85	88.42	6.34	5.51
Newham	79.50	81.53	87.38	85.84	7.88	4.31
Southwark	78.59	83.73	84.75	90.03	6.16	6.30
Tower Hamlets	77.65	82.50	83.53	88.32	5.87	5.82
Wandsworth	79.00	83.24	84.30	88.25	5.30	5.00
Barking & Dagenham	77.19	82.35	82.76	87.77	5.57	5.42
Barnet	81.03	85.15	86.06	90.44	5.03	5.29
Bexley	80.11	83.54	85.25	87.94	5.14	4.39
Brent	78.88	84.08	84.30	89.60	5.42	5.52
Bromley	80.69	85.03	85.86	90.43	5.17	5.39
Croydon	79.94	82.80	86.72	87.42	6.77	4.61
Ealing	80.01	83.66	86.31	88.14	6.30	4.48
Enfield	80.00	83.96	84.95	88.60	4.95	4.63
Greenwich	78.48	82.73	84.21	88.51	5.73	5.78
Harrow	82.31	85.53	88.30	90.82	5.99	5.29
Havering	79.82	83.12	85.27	87.51	5.46	4.39
Hillingdon	80.02	83.39	85.41	88.41	5.39	5.02
Hounslow	79.66	83.49	85.18	88.26	5.52	4.77
Kingston upon Thames	81.13	83.71	86.05	87.37	4.92	3.67
Merton	80.27	83.92	85.29	88.08	5.01	4.16
Redbridge	80.19	83.73	85.52	88.19	5.33	4.46
Richmond upon Thames	81.48	84.63	87.32	89.56	5.84	4.93
Sutton	80.35	83.52	86.00	88.18	5.66	4.65
Waltham Forest	79.69	83.44	85.70	87.87	6.00	4.43

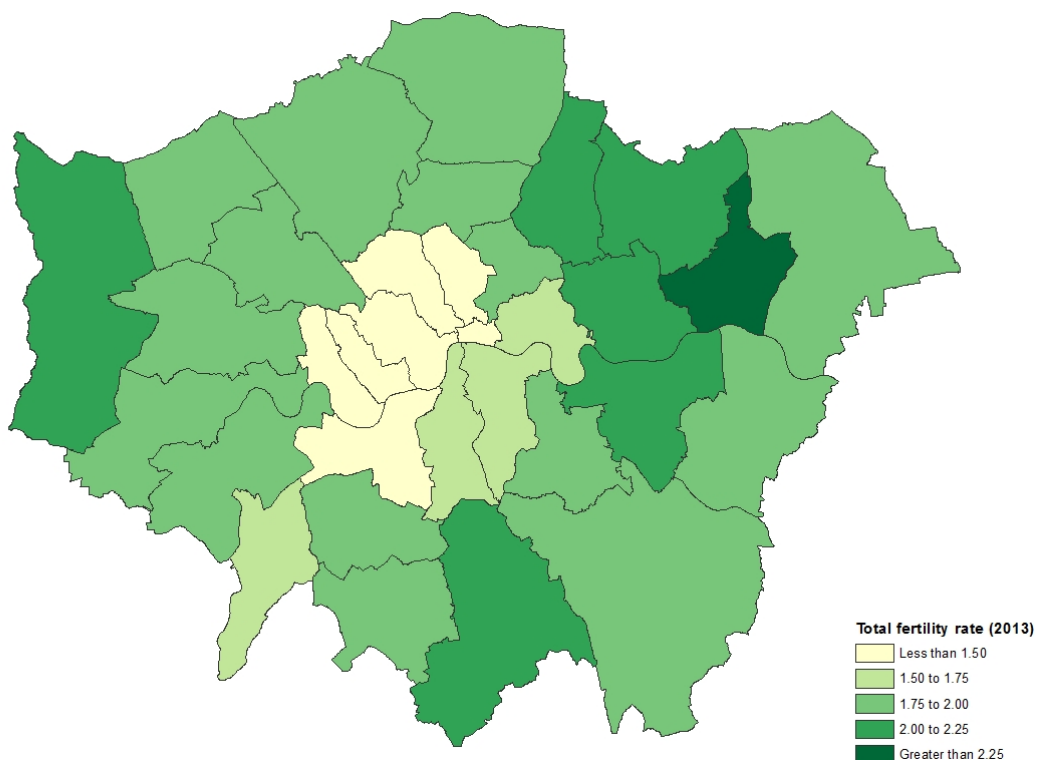
Source: GLA 2014 round of trend-based population projections

Total fertility rate (TFR)

The total fertility rate¹ for 2013 shows a clear pattern of being lower in the Central London area and higher in boroughs at the edge of London and to the east (Figure 10). Barking & Dagenham had the highest TFR of 2.53 births/woman followed by Newham with 2.13. Seven boroughs overall had a TFR over 2.0 and with the exception of Newham are all in Outer London.

City of London had the lowest TFR, at only 1.15, followed by Camden and Westminster with 1.27 and 1.30, respectively.

Figure 10: Total fertility rate, 2013



Source: GLA 2014 round of trend-based population projections

Estimated and projected annual births for London boroughs can be seen in Table 6. The projected rise in births (2013 to 2036) is set to be considerably greater under the short-term migration scenario; over four thousand compared to only some 260 under the long-term migration scenario.

Central London boroughs under both scenarios are projected to see their number of births fall by an average of 350 over the period whilst births in Outer London boroughs are set to rise (by over two thousand under the short-term migration scenario and only some 840 under the long-term migration scenario). However in the remaining Inner London boroughs, births under the short-term migration scenario are projected to rise by over two thousand compared to falling by nearly 200 under the long-term migration scenario.

Ten boroughs (six of which are Outer London boroughs) are projected to see the number of births fall under both scenarios.

¹ Total Fertility Rate (TFR) is the average number of children a woman is expected to have over her lifetime if the current age-specific fertility rates remained the same throughout her lifetime.

Table 6: Annual births, London boroughs, 2013 and 2036

Borough	2013	2036	
		Short-term	Long-term
Camden	2,861	2,972	2,808
Kensington & Chelsea	1,909	1,570	1,736
Westminster	2,832	2,737	2,649
City of London	71	89	82
Central boroughs	7,673	7,369	7,275
Hackney	4,507	4,795	4,478
Hammersmith & Fulham	2,599	2,439	2,584
Haringey	4,150	4,291	4,044
Islington	2,945	3,209	2,827
Lambeth	4,645	4,762	4,628
Lewisham	4,951	4,880	4,748
Newham	6,260	7,262	6,667
Southwark	4,908	5,023	4,735
Tower Hamlets	4,805	5,392	4,761
Wandsworth	5,269	5,278	5,384
Rest of Inner boroughs	45,039	47,330	44,857
Inner boroughs	52,712	54,699	52,131
Barking & Dagenham	3,866	4,487	4,032
Barnet	5,286	5,544	5,280
Bexley	2,972	3,121	3,096
Brent	5,170	5,246	5,357
Bromley	3,981	3,954	3,870
Croydon	5,747	5,515	5,493
Ealing	5,687	5,241	5,420
Enfield	4,966	5,382	5,272
Greenwich	4,564	4,589	4,662
Harrow	3,620	3,469	3,610
Havering	2,926	3,375	3,311
Hillingdon	4,390	4,712	4,363
Hounslow	4,512	4,640	4,479
Kingston upon Thames	2,213	2,216	2,075
Merton	3,474	3,391	3,332
Redbridge	4,706	5,200	5,155
Richmond upon Thames	2,826	2,775	2,795
Sutton	2,639	2,678	2,553
Waltham Forest	4,754	4,901	4,987
Outer boroughs	78,299	80,437	79,142
Greater London	131,011	135,135	131,273

Source: GLA 2014 round of trend-based population projections

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