



RENAISI
THE REGENERATION COMPANY



Croydon

Summary of key facts and drivers

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Key facts and drivers of change for Croydon

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Population and community

Key facts

- At 339,500 Croydon has the largest population of all London boroughs. It also has a higher than average fertility rate: 70 births to 1,000 women (aged 15-44) compared to 62 in England and 68 in London.
- Population estimates show that around 37% of residents were from ethnic minority communities, compared to 33% across London.
- In 2006, 50% of Croydon's school-age population were from ethnic minority communities.
- Population increases in the borough have been driven by longer lives and increasing birth rates rather than migration.
- The borough is losing couples at a rate of 1,260 residents annually and dependent children at a rate of 489 annually. On average, Croydon is losing 204 families annually
- The borough lost 26,810 people to the South-East of England, but gained 19,880 from the rest of London between 2001-07.
- Croydon lost 1,900 managers and professionals and gained 5,900 residents employed in sales and customer service occupations between 2001-07.
- A quarter of children in Croydon live in poverty
- Crime is lower in Croydon on most measures compared to the London average but fear of crime, especially in Croydon centre, is often raised as an issue.
- Knife crime in Croydon is on the increase, which is against the downward trend across London (the actual numbers are low).
- Crime is higher in the north of the borough than it is in the south. For example, there are 26 violent offences per 1,000 population in Thornton Heath in the north, compared to 6 in Sanderstead in the south.
- There is consensus that Croydon has a strong third sector that is able to represent residents and their needs.

Key drivers

- There are two main projections for population growth: the 'GLA High Population' and the 'GLA Low Population' forecast. The GLA recommend using the 'high forecast' when planning the long-term (over 10 years).
- On the basis of the 'high population forecast', the population will increase by 16,220 in Croydon by 2026, and 1.1 million in London.
- The population of Croydon will get older. There will be nearly 8,000 less children and young people in Croydon and over 10,000 more older people (65+) by 2026. However, by 2018 there will be a 13% increase in the number of 4 year olds requiring a school place.

- By 2026, over 50% of the population will be ethnic minority communities overtaking the proportion in London, which will rise to 39% by 2026.
- Changes in the ethnic make-up of the borough will be driven partly by the domestic migration of White groups to the rest of the UK and some other Outer London boroughs, but also by higher fertility rates amongst some Ethnic Minority communities and international migration.
- There will be an additional 19,000 households in Croydon by 2026. Whilst there will be a 15,310 decline in the number of married households, there will be a rise of 22,503 single households in Croydon.
- International migration, especially from Eastern European Countries, is likely to pick up in line with economic recovery as the economy requires more migrant workers to support economic growth.
- There will be challenges for local community cohesion as the population's ethnic mix and age demographic changes radically over the next 20 years.
- The performance of schools could suffer as higher social-economic groups migrate out of the borough.
- Crime is becoming increasingly technological and based on identity theft and fraud.
- The trend in UK cities of rising levels of violent crime involving guns and knives fuelled by gang culture could become a major issue in thirty years time if not addressed.

Health

Key facts

- Life expectancy in Croydon is in line with the London and national average at 78 for men and 82 for women. Life expectancy is 0.5 a year higher for women and men living in Bromley.
- Life expectancy increased by 2.8 years between 1993 to 2003 in Croydon.
- There are stark local disparities in life expectancy. Residents from the Sanderstead ward (south Croydon) are likely to live nearly six years longer than residents in Selhurst in the north.
- Overall Croydon has lower than average levels for major causes of mortality including circulatory heart disease, cancer, respiratory disease and tuberculosis. However diabetes prevalence is above average, as are estimated excess deaths among young people.
- Croydon has lower than average levels of participation in sport and active recreation and consumption of fruit and vegetables is above the national, but below the regional average.
- Croydon has 57 under-18 conceptions per 1,000 girls aged 15-17, which is substantially higher than London's 45 and England's 40. Ward-by-ward, under-18 conceptions are concentrated in the north and south-east of Croydon.
- The prevalence of sufferers of mental health is broadly in line with the London average, with its incidence falling in the more deprived areas in the north, as well as being significantly higher amongst women.
- At 15%, the proportion of the population with a disability is slightly below average.

Key drivers

- The ageing population will place a heavier burden on many public services including healthcare, supported housing and other essential services.
- Health services, alone, will see a 20% increase in demand for GP Consultations and a 41% increase in all consultations by 2018.
- By 2010 a third of all adults, a third of all girls and a fifth of all boys will be obese if current trends continue.
- Public services will increasingly move towards a more personalised model that enables the service-user to have greater choice and flexibility.
- The demands for services to meet the needs of an increasingly complex society could lead to a much greater role for the third sector delivering services.
- To prevent spiralling costs for public sector services, delivery will need to shift to a much more preventative approach in key areas such as encouraging healthier lifestyles; improving 'life changes' through early years provision; building community cohesion; reducing crime and anti-social behaviour and targeted work with 'at risk' young people.

- The combination of an aging population, lifestyle patterns and more effective medical interventions means that chronic diseases are likely to increase in incidence
- Obesity is now one of the biggest health issues to address in this country. The analysis by the government's Foresight programme shows that 40% of Britons could be obese by 2025 and over half of the UK adult population could be obese by 2050.
- Across the UK there is expected to be a rise in the number of disabled adults over the age of 60 requiring healthcare, from 4.6million in 2001 to 5.2million by 2011
- The cost to UK economy of treating could treble from £17 billion per year today, to over £50 billion per year by 2050.

Housing

Key facts

- Croydon is a very residential borough; domestic uses make up a significantly larger proportion than non-domestic uses.
- Suburban housing (detached and semi-detached) makes up 37% of housing in Croydon compared to 25% in London.
- 67.85% of households are owner-occupied, which is in line with outer London (67.1%), but significantly above the London average (55.51%).
- Socially-rented housing only makes up 16.7% in Croydon, whereas it makes up 24.3% of all housing in London.
- House prices are still relatively affordable in Croydon compared to other areas in South London and the South-East of England.
- There has been a 49% rise in the number of households on the Local Authority Housing Register since April 2000.
- The rate of overcrowding and the number of people moving in and out of local areas, known as population churn, is significantly higher in the north of the borough.

Key drivers

- It is anticipated that at least 16,250 homes will be built in the borough over the next 15 years with at least 10,000 in Central Croydon.
- Outside of Central Croydon, other key sites for residential development are in areas of the north and along the Purley Way/A23.
- The provision of affordable housing through private developments and s106 agreements will become increasingly unviable in the medium term as the cost of borrowing from banks increases.
- Lower land values over the short to medium term may present opportunities for residential development led by the Council, Homes and Communities Agency or Registered Social Landlords.
- An up-to-date urban capacity study is urgently needed to confirm potential sites for housing that can be brought forward over the medium to long-term.

Education, skills and jobs

Key facts

- 58.8% of pupils taking GCSEs obtained 5 (A*-C) in 2007, which was just below the London average of 60.9% and the national average of 62%. However, Croydon's outer south London neighbours perform considerably better: over 70% of children achieved 5 GCSEs (A*-C) in both Bromley and Sutton in 2007.
- There are major local disparities in educational attainment between wards: only 33% of pupils in Addiscombe achieved 5 (A*-C) GCSEs, whereas 68% did in Sanderstead.
- Croydon, like London, has significant sections of its working age population (16%) with no skills or qualifications.
- 40% of working age residents are employed either in professional or managerial occupations, whereas 52% of residents in London are.
- Between 2000-07, the proportion of residents employed in either managerial or professional occupations fell by 2.6%, whereas it rose by 2.7% in London.
- Only 30% of Croydon's working-age population are qualified to degree level, whereas in London the figure is 37%.
- 22% of Croydon's working age population is economically inactive compared to 25% in London.
- Economic activity has fallen amongst males since 1999 with an additional 4,400 males 'not wanting a job'.
- Black working age residents make up 26% of JSA Claimants, but only comprise 16% of the working age population.
- 10.5% of working age residents claim at least one form of working age benefit compared to 14.1% in London.
- 7% of Coulsdon West's working age population claim a working age benefit compared to 18.3% in Broad Green.

Key drivers

- By 2020, 40% of new jobs will require graduate-educated people and there will be an increasing need for people with 'environmental skills', such as engineering or an applied science, to help drive low carbon growth.
- Low skilled residents and those without any skills will be increasingly excluded from the labour market or limited to low-income jobs.
- Intermediate skills will be increasingly required in the medium-term as older people retire in professions, such as plumbing and other skilled trades.
- The Gatwick Diamond, if successful, could increasingly become an employment destination for residents in Croydon.

Economy, retail and town centres

Key facts

- Croydon Metropolitan Town Centre is the borough's only metropolitan town centre and has more floorspace than any other town centre in South London.
- Croydon is a strategic office location; 40% of Croydon town centre's floorspace consists of offices. However, the poor condition of its '1960s office stock' is a major reason for businesses locating elsewhere or re-locating from Croydon.
- Croydon is a big business economy with 44% of people employed in enterprises with over 200 employees.
- Between 2003 to 2005 employment in knowledge-intensive industries fell by 12.6% in Croydon, whereas it rose across London as a whole.
- Croydon's creative industry employs 8,500 people and is the 3rd biggest in South London.
- Between 1995 to 2006 there was a 45% decline in manufacturing jobs in the borough.
- Croydon Metropolitan Centre has the 5th and Purley Way the 7th highest retail turnover in London.
- Croydon's rateable value for its retail units is worth over £50m: more than any other centre in South London.
- Croydon's district centres are in different levels of health with Coulsdon and Purley maintaining the rateable value of their retail units while Thornton Heath, Upper Norwood and Norbury have all seen a decline.
- District centres across London, such as Thornton Heath, experienced a 29% decline in retail employment between 1971 and 2001.
- Croydon is an affordable office location. Croydon centre's rateable value per square metre of office space is £83.46 and retail is £152.32. This is considerably less than Central London and Docklands. In Canary Wharf the rateable value for retail is £247, and for office the figure is £207.
- Croydon should be an attractive investment opportunity. Between 2000 to 2004, Croydon's rateable value for retail rose by 7% while other centres rose by considerably less.

Key drivers

- On the basis of the most recent projections, London's economy will grow by 912,000 jobs by 2026. Growth will be concentrated in business services (560,000), hotels and restaurants (212,000), retail (67,000) and financial services (45,000).
- Croydon's economy is predicted to grow by 6,000 new jobs by 2026.
- Croydon may become increasingly more attractive as a business location as companies seek to scale back their costs by moving away from Central London.

- Croydon centre's office sector offer is under threat from competitor centres in not just London and the South-East of England, but also places as far away as India.
- When the economy picks up again, environmentally sustainable, safe and modern city centres will be as influential as rental costs in companies' decisions to locate.
- Central Croydon is predicted to become the third largest retail centre, in terms of turnover, in London by 2016: its turnover will grow by £700 million between 2006 and 2026. National retail spending on non-grocery goods, alone, is predicted to rise by 4.8% annually in a growing economy.
- The growth of Croydon centre presents a risk to the sustainability of the district centres in the borough if they do not create a sustainable and diverse offer.
- These are longer term predictions and so are not influenced by the short-medium term impact of the credit crunch. It is expected that over the next 30 years there will be economic growth across London and it will most probably occur in these broad sectors.

Connections and transport

Key facts

- Croydon's accessibility into central London, the South-East and the rest of South London is one of the borough's key strengths.
- The Croydon-Croydon daily commuter flow involves 65,000 people and is the biggest in London.
- 8.5% of people work from home in Croydon, which is one of the highest proportions in London and there was a 134% increase in home working between 1991 to 2001.
- East Croydon Station is reaching the limit of its present capacity with over 26,000 using the station daily.

Key drivers

- The expansion of the East London Line and of the tram network will further enhance the attractiveness of the borough to potential investors, businesses and shoppers considering locating to Croydon.
- South Norwood will have its own East London Line station as part of the extension, bringing with it the potential for development around the transport node in particularly high density residential development.
- The main traffic route through Croydon town centre makes it less attractive to investors, business, shoppers and visitors.
- Travel to work trends point to an increase in car usage in outer London boroughs increasing the risk of road congestion.

Environmental sustainability

Key facts

- Each resident in Croydon uses 50 GWH of energy annually.
- Recycling increased from 14.1% in 2003 to 20.1% in 2007, which is still lagging behind the London average of 22.9%.
- Croydon's CO2 emissions at 5.4 tonnes per capita are in the lowest third of London boroughs but includes the 7th highest emissions from road transport.
- Over a third of Croydon is protected green space, which is one the highest in London.

Key drivers

- The UK has agreed a 60% cut in carbon emissions by 2050, based on 1990 levels.
- A massive change in resident and organisational behaviour is needed to achieve tough targets for reducing landfill, carbon emissions and improving air quality.
- If behaviour change regarding environmental sustainability is not achieved then town centres will experience poor liveability as air quality decreases.