GLA Population Projections

Briefing for Strategy Community Group

26 June 2014

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Content

- Population Highlights from Census 2011

- Brief overview of the different population projection models available :

> (1) ONS 2011 interim
> (2) GLA 2013 trend-based - High
> (3) GLA 2013 trend-based - Low
> (4) GLA 2013 trend-based - Central
> (5) GLA 2013 SHLAA (DCLG-linked)
> (6) GLA 2013 SHLAA Capped Household size

- Graphs comparing different models by different age bands – which one for what ?

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Croydon Headlines from 2011 Census

- 10% population growth in Croydon since the 2001 Census (330,587 to 363,378)

- Croydon became the borough with largest population.

- Gender split : 176,200 males (48%) and 187,200 females (52%).

- Croydon high proportion of people in 0-19 years age band.

- There were 229,959 people aged 18-64 years – 63.3% of total Croydon population.

- Twice as many females aged over 85 years than males.

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Age structures, 2011
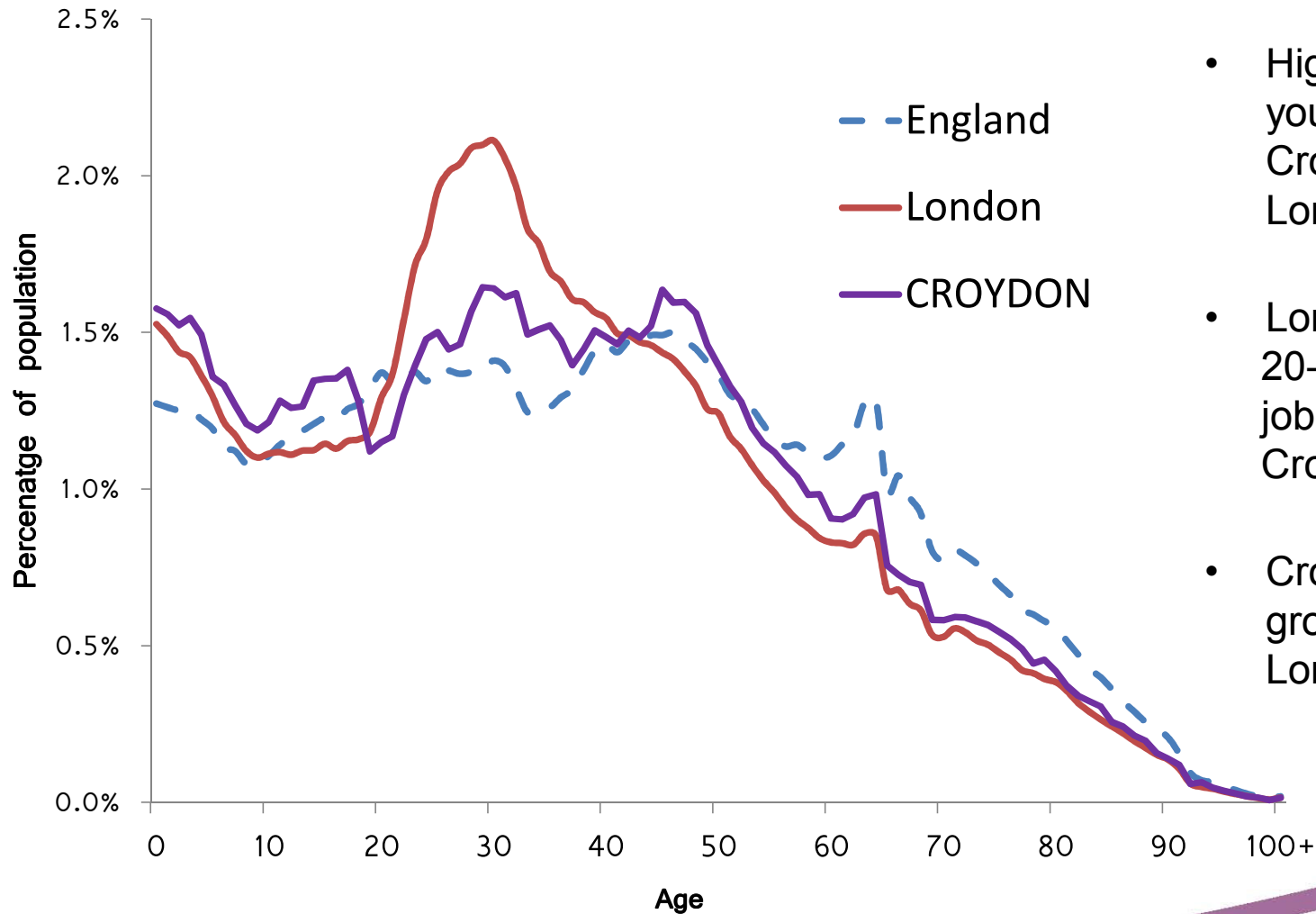
- Higher % of children and young people (0-20years) in Croydon compared to London and England.

- London age profile peaks 20-40 years – students and job-seekers - flatter in Croydon.

- Croydon trends for older age groups (60+ years) similar to London.

ONS Mid Year Estimates

- Each "comprehensive" Census collected every 10 years.

- ONS Mid-year estimates to bridge gap between the years.

- Before Census 2011, ONS had predicted 4.4% growth in Croydon population. The reality was 9.9%.

- 2011 Census population higher than ONS forecast in Croydon e.g. 0-4 year olds.(+5.5%) and 45-49 years (+7.3%)

- GLA started to look more closely at the ONS projection model.

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(1) ONS Interim 2011-based
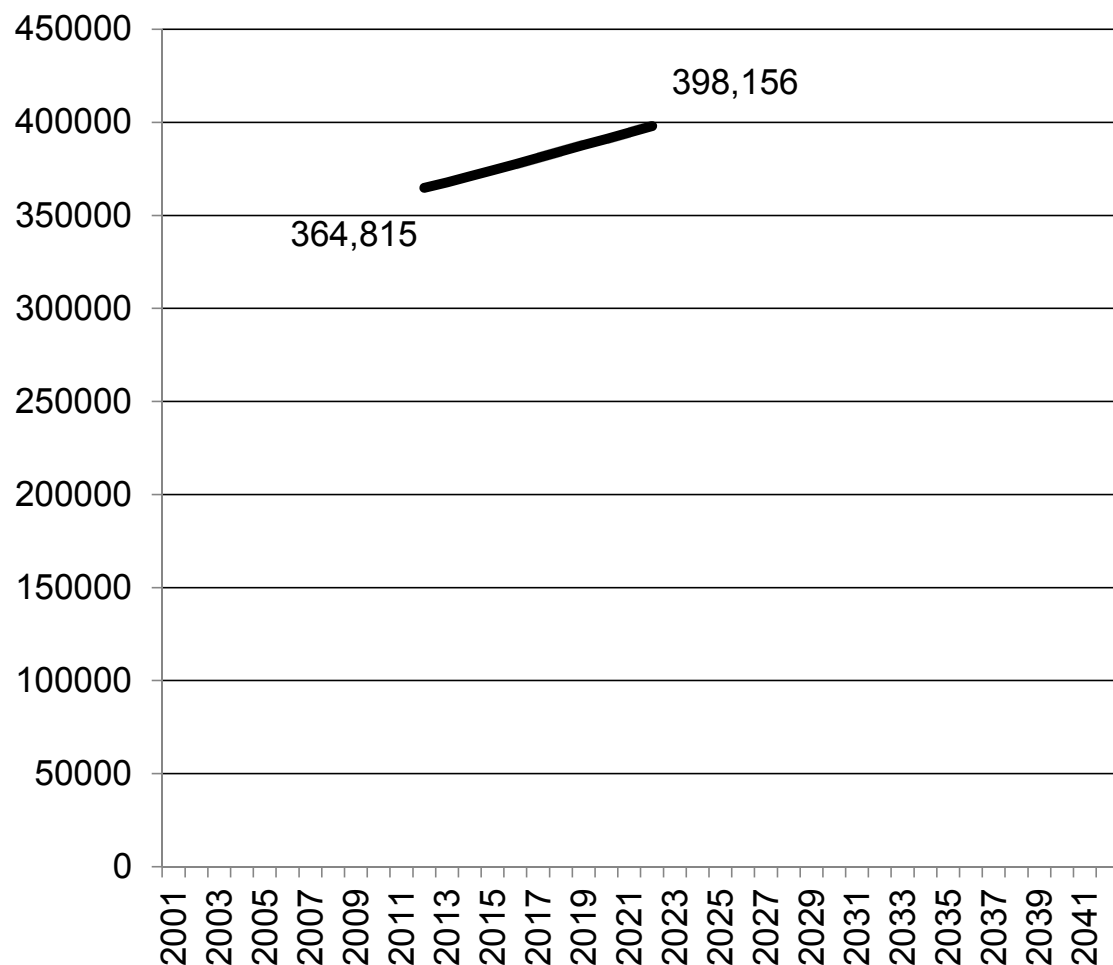
- ONS assumptions take no account of **building development plans that have not yet impacted observed trends.**

- ONS used 2011 Census population but they had **no consistent back series** to help predict the probability of population projections going forward.

- ONS used **inflated fertility** historic data to bring population up to the 2011 Census population.

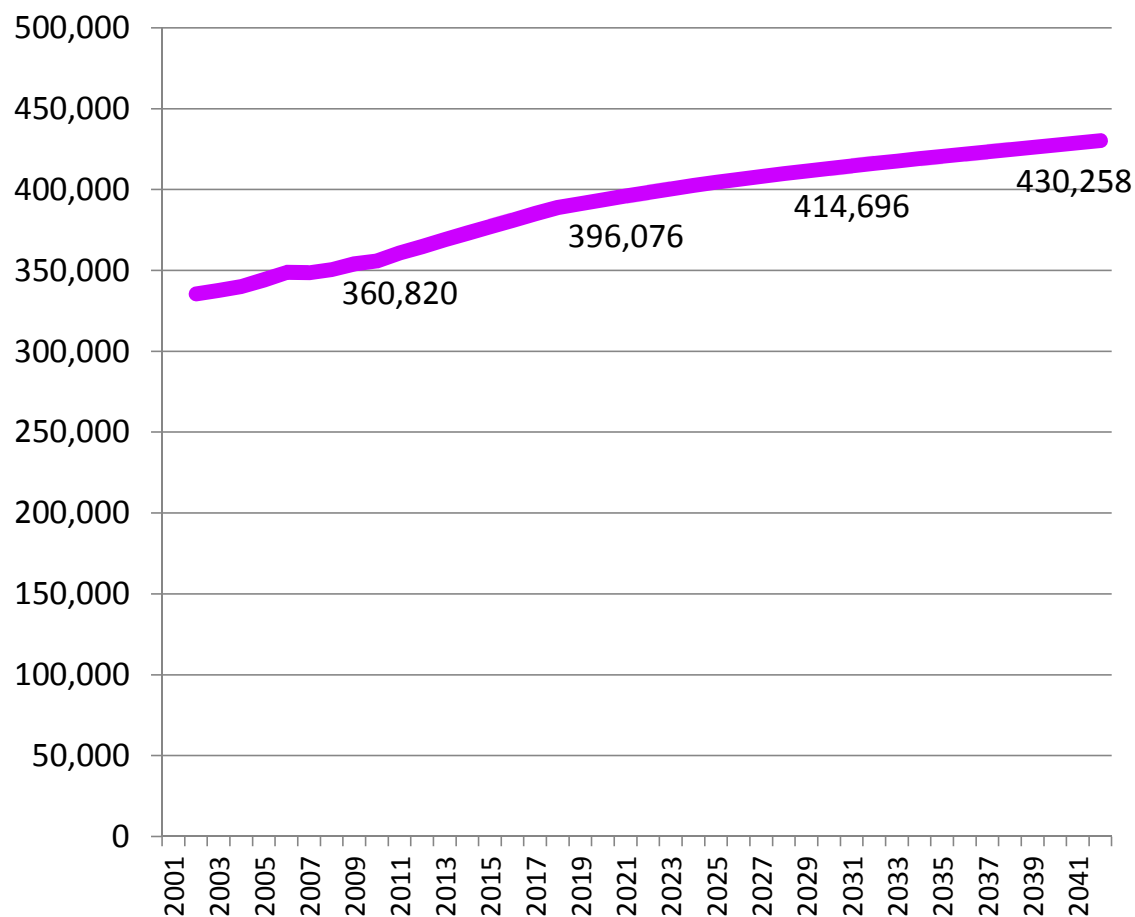# The Projection Cycle – GLA Trend based
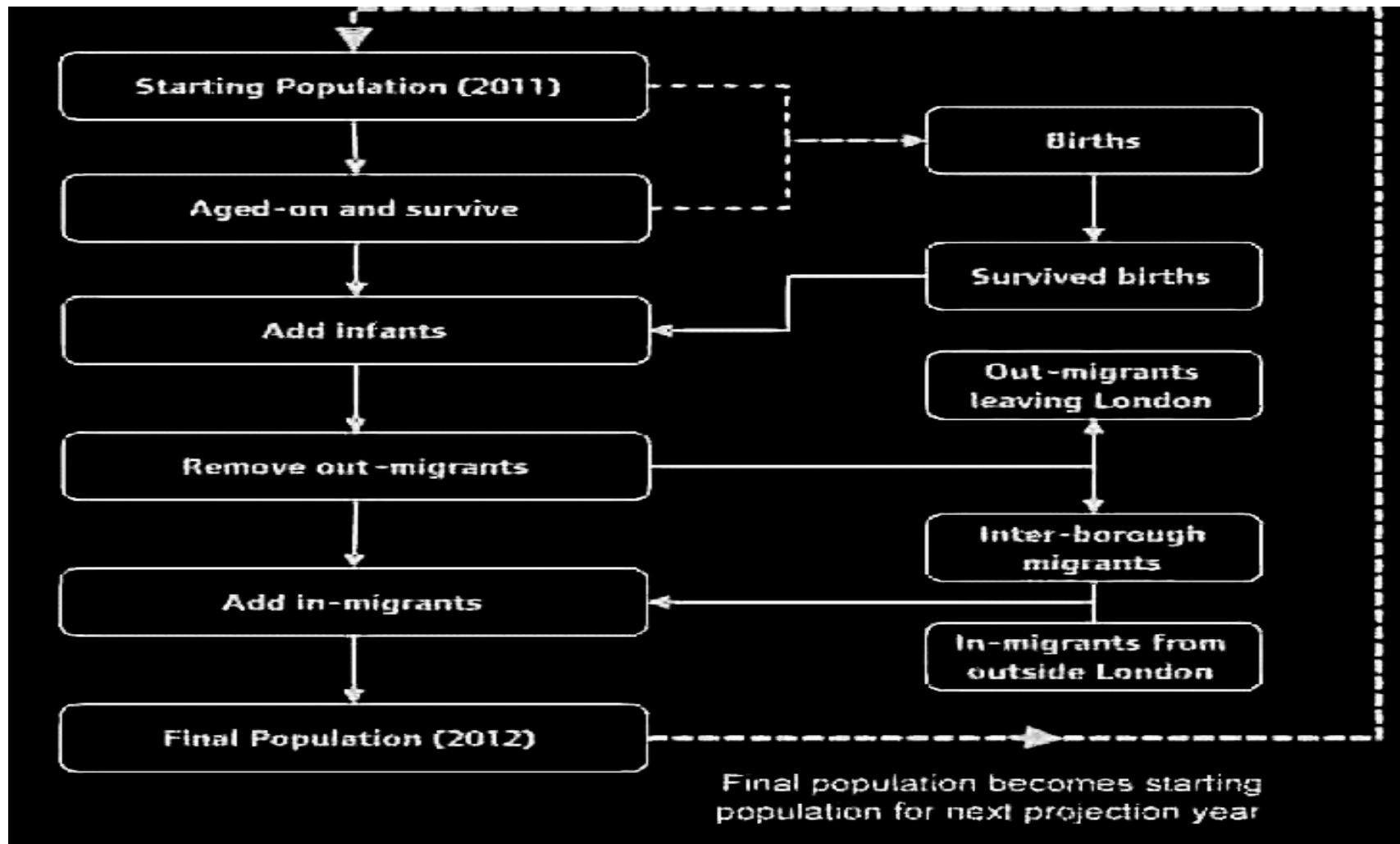
(2) GLA 2013 Projections - High
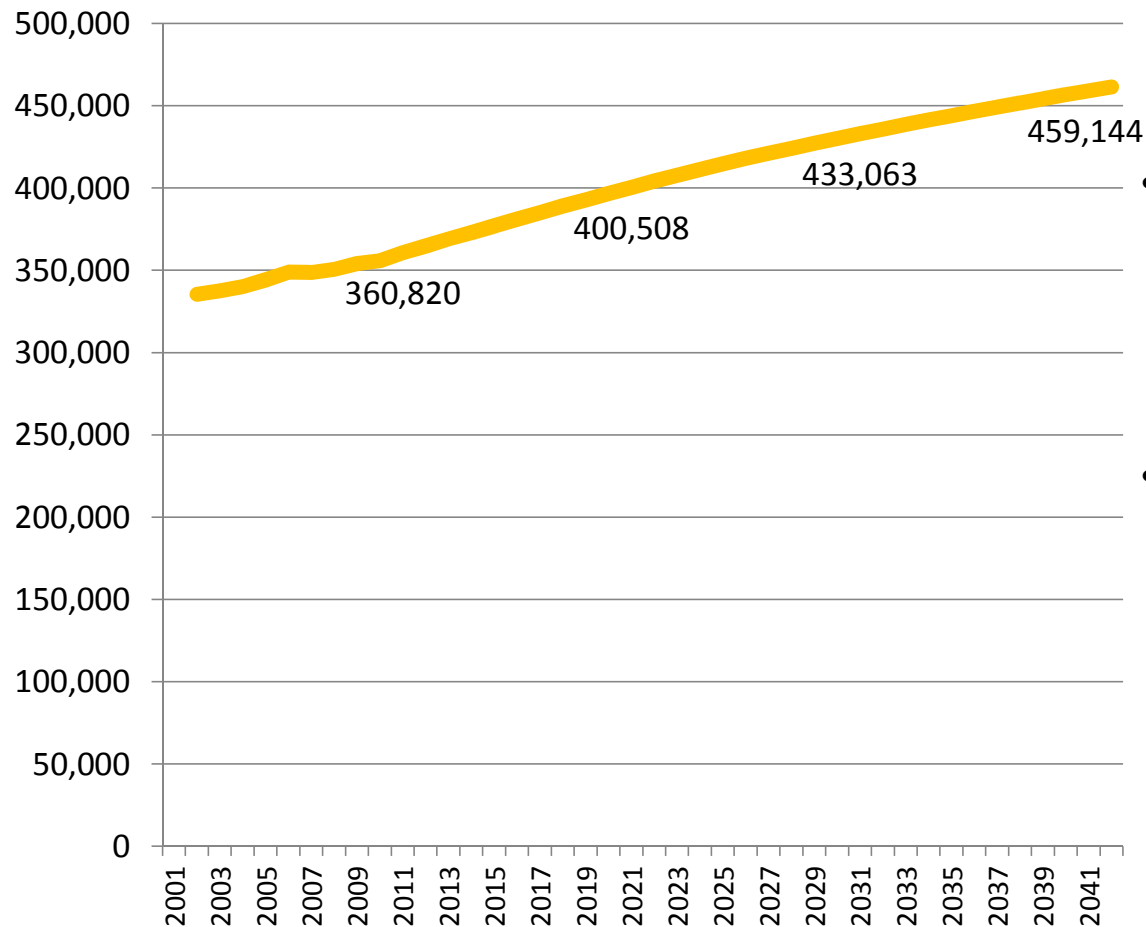
- Domestic migration trends are taken from the period mid-2008 to mid-2012 and held constant for the entire projection period .

- The predicted economic recovery in 2017 has no effect on domestic migration.

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(3) GLA 2013 Projections - Low

- Domestic migration patterns are assumed to be only short-lived, returning to 2008 recession trends beyond the 2017 "recovery".

- Domestic migration is the same as per the High projection through to mid-2017. Beyond this point, migration outflows increase by 10% and inflows decrease by 6%.
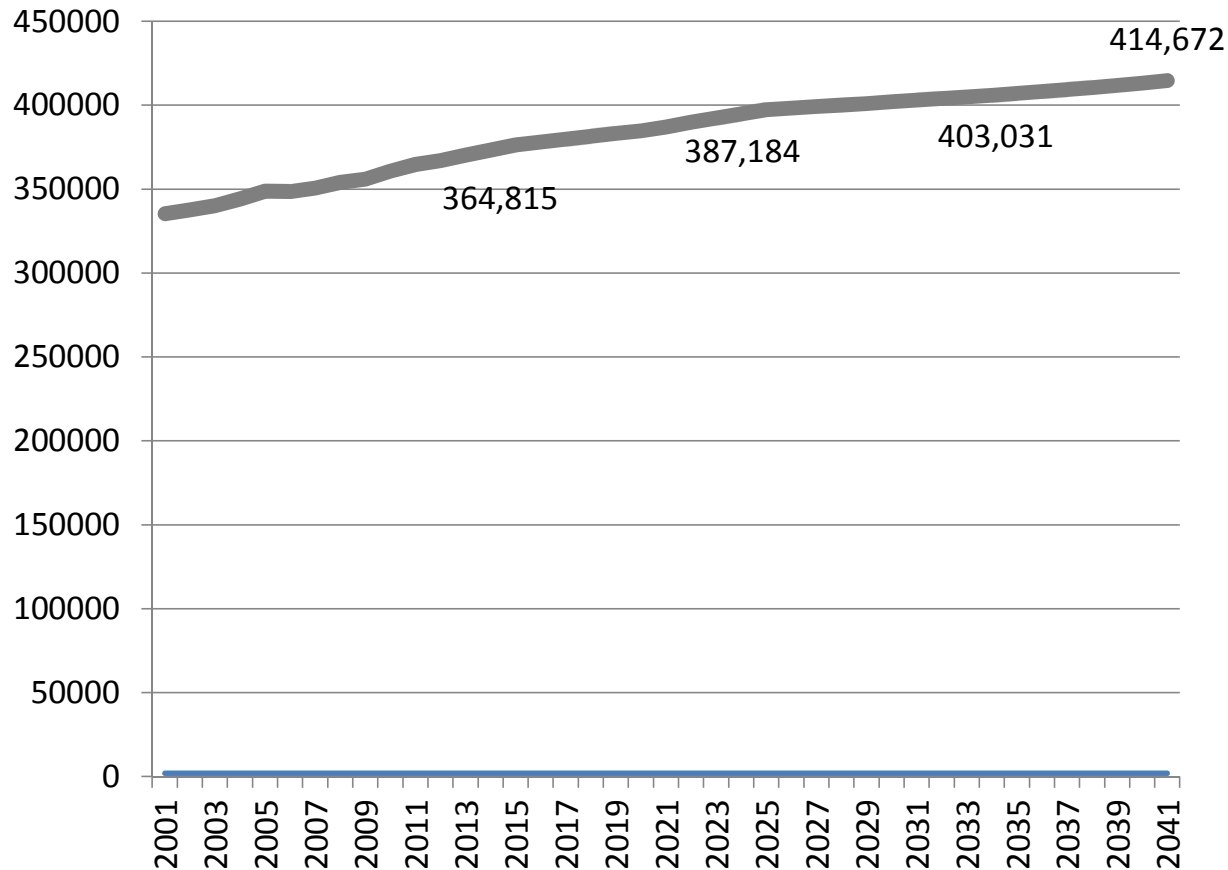
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(4) GLA 2013 Projections - Central
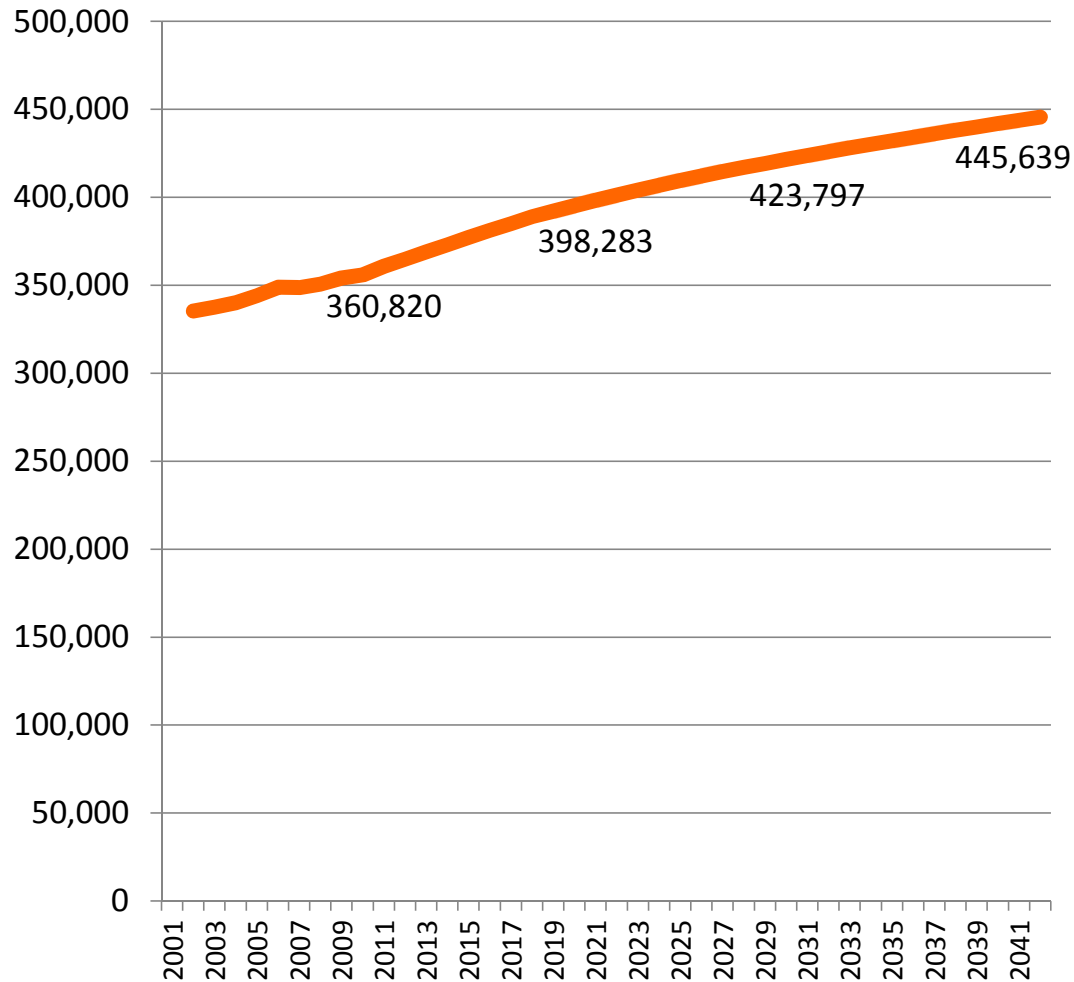
- In this scenario, beyond mid 2017, domestic outflows are set to increase by 5% and inflows to decrease by 3% compared to the High variant.

- Basically, this scenario takes the mid-point of the assumptions in the High and Low projections.

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GLA Trend-based projections - Summary

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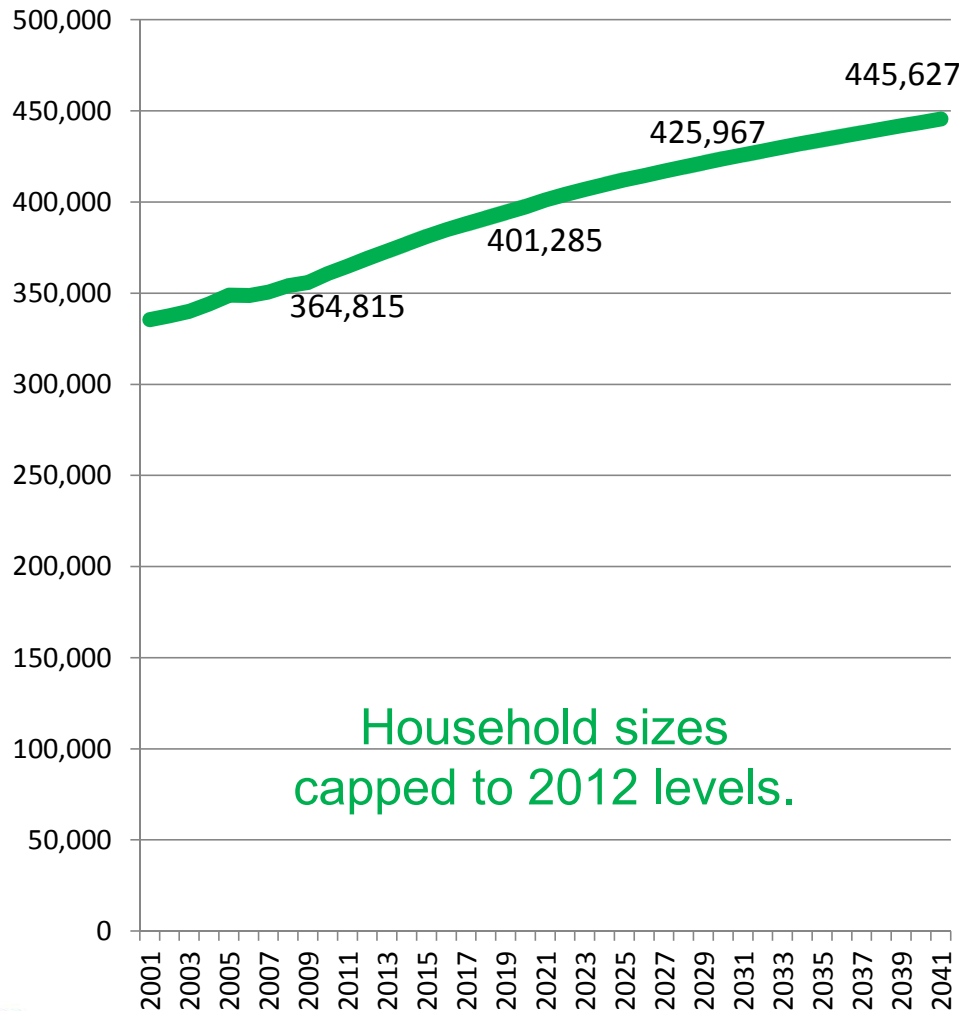www.croydon.gov.uk
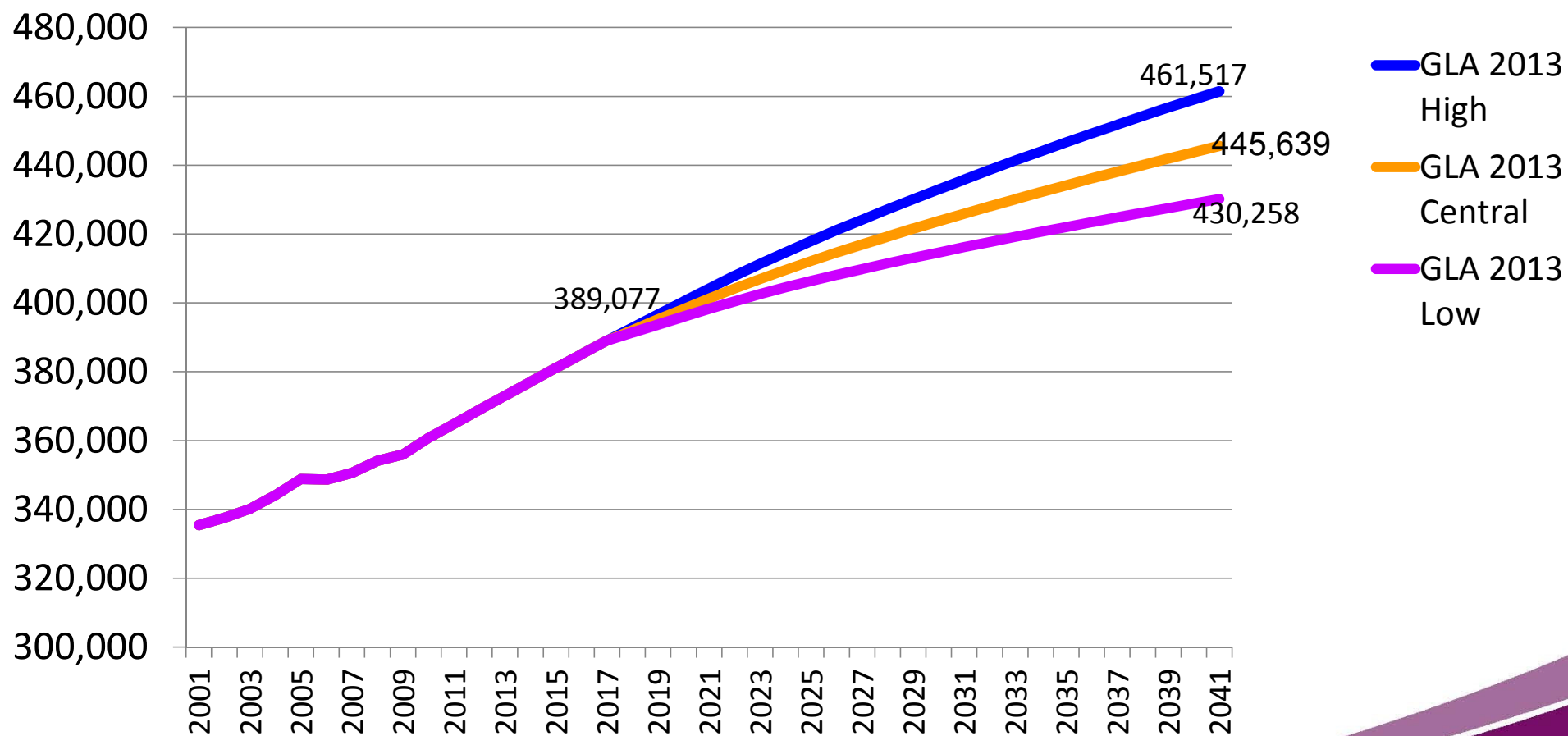
(5) SHLAA 2013 - DCLG-linked model

414,672

403,031

387,184

364,815

- Forecasts from 2011 to 2021 based on household formation rates from 1971 – 2011 trends.

- Uses household representative rates (HRR) from DCLG 2011-based household projections to match population to household spaces available.

- GLA extrapolate the HRR beyond 2021.

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(6) GLA SHLAA-Household Size capped

Household sizes capped to 2012 levels.

364,815
401,285
425,967
445,627

Includes Croydon submission of projected housing completions by ward including :-

- sites under construction

- sites with planning permission but not built,

- future housing site identified in the GLA's SHLAA

- sites in the Croydon Opportunity Area (the town centre), and

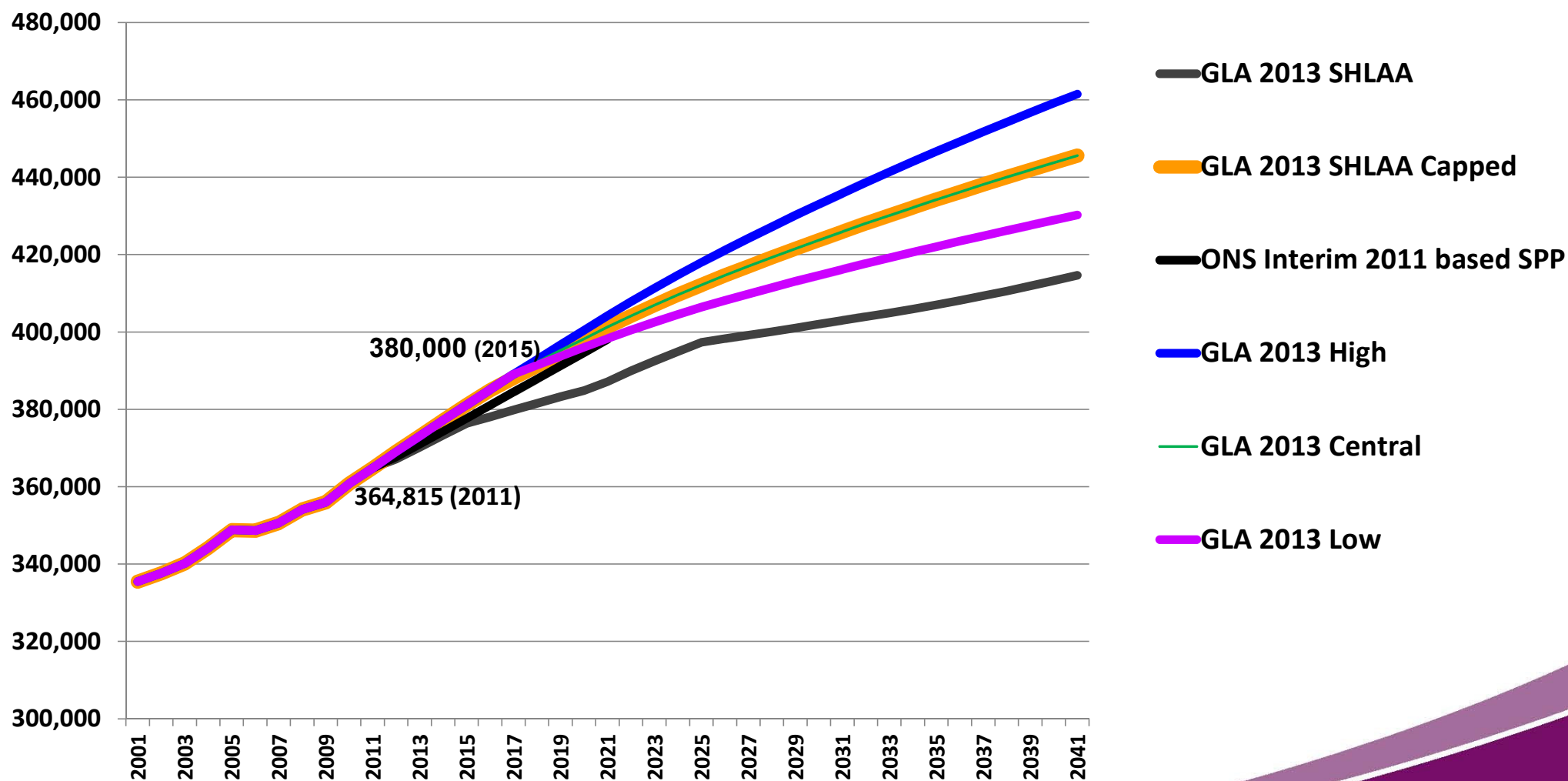- a projected supply from notional small sites based on past trends.

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GREEN   SHLAA – HH Capped -
Recommended by GLA for Croydon

AMBER   Trend based "Central" – "BPO"

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Population - All Years

Legend:
- GLA 2013 SHLAA
- GLA 2013 SHLAA Capped
- ONS Interim 2011 based SPP
- GLA 2013 High
- GLA 2013 Central
- GLA 2013 Low

Chart annotations: 380,000 (2015); 364,815 (2011)

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0 - 4 years

Legend:
- GLA 2013 SHLAA
- GLA 2013 SHLAA Capped
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5 – 10 years

Legend:
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- GLA 2013 SHLAA Capped
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11 - 18 years

Legend:
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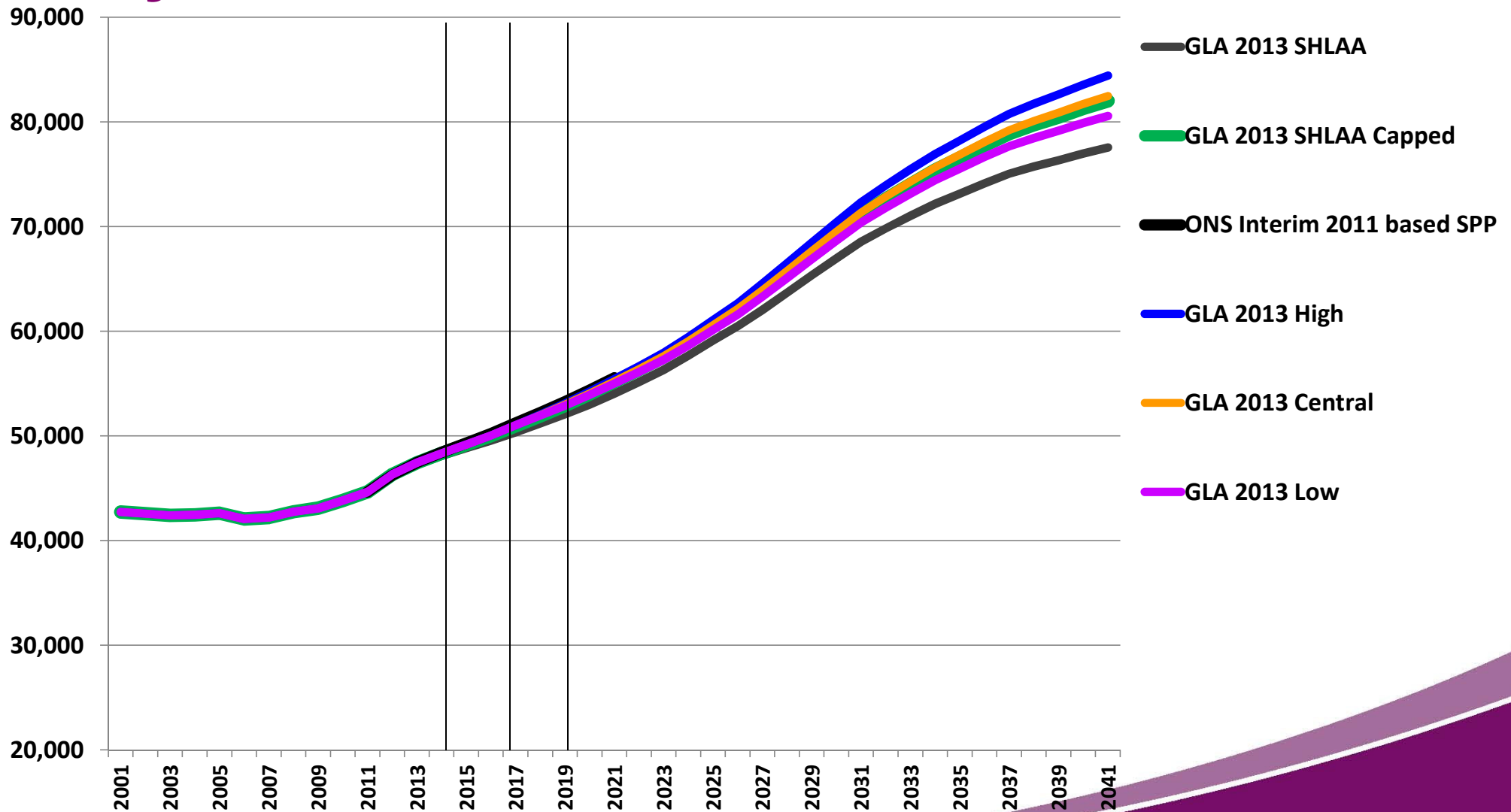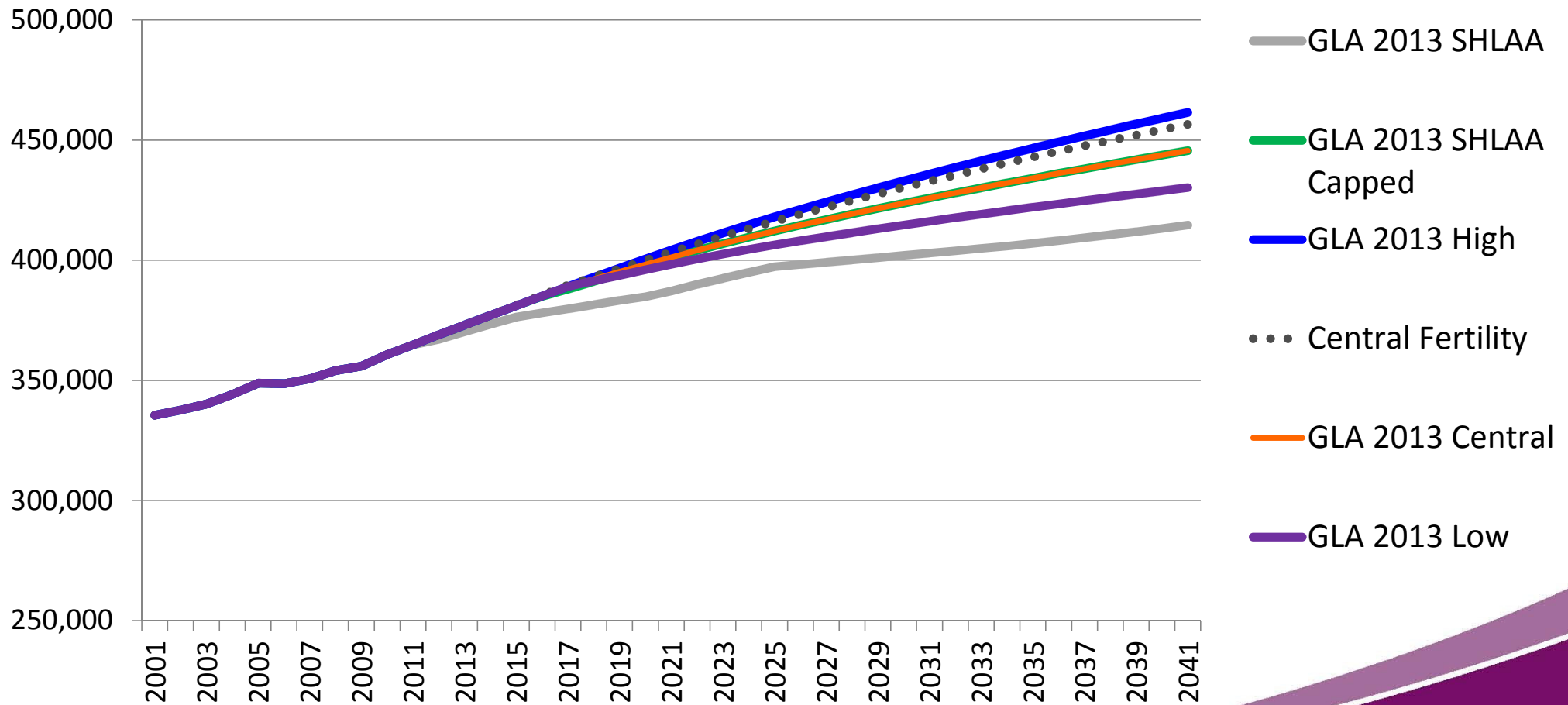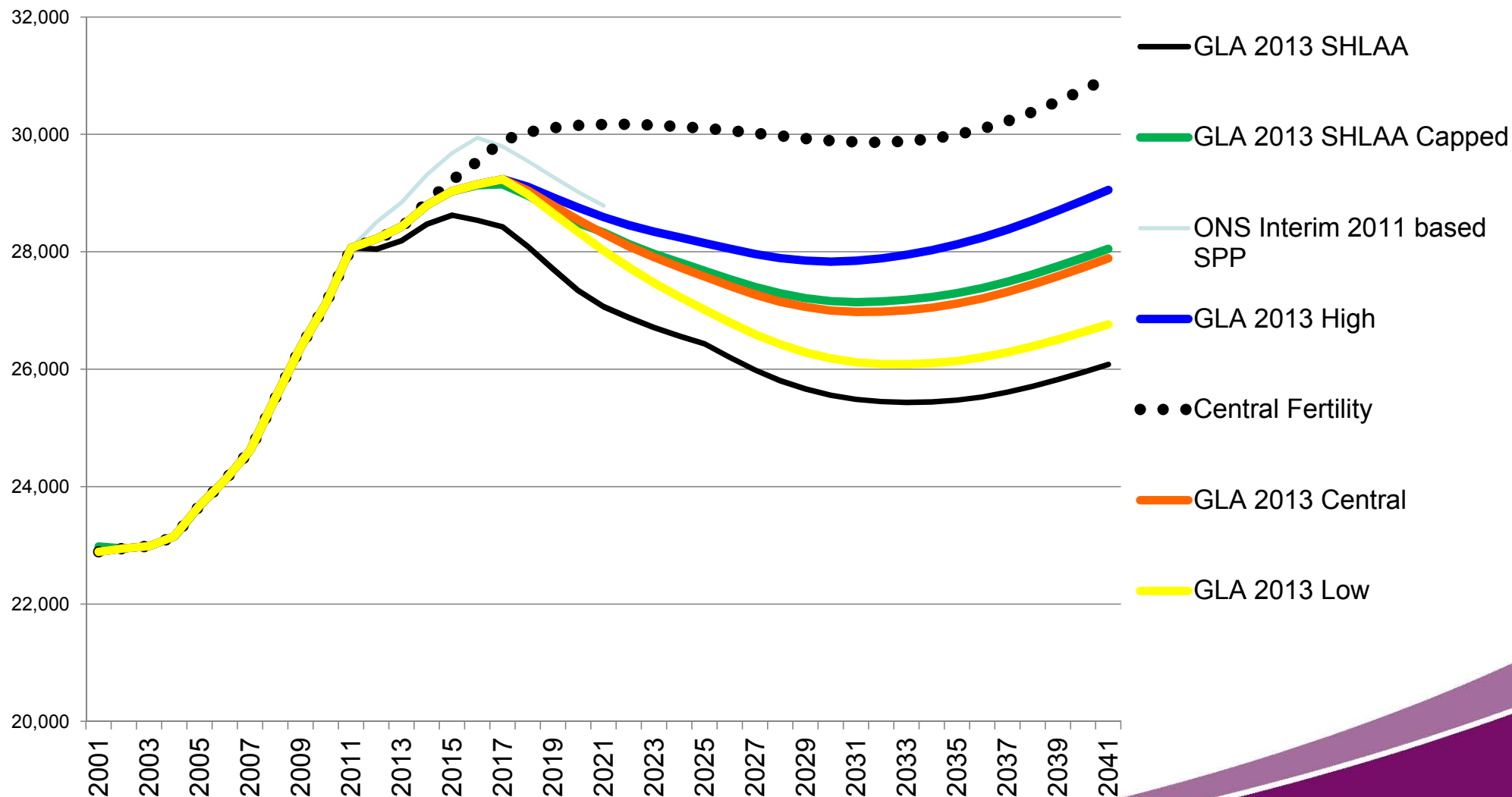
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19 - 64 years

65+ years

GLA "Central" (revised fertility data) compared to other GLA population projections (All years)

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0-4 years – Revised "Central" fertility rates, 30. May 2014

GLA "Central" - revised fertility data, 30. May 2014

0-4 years :   Higher than all others projection from 2017 to 2041.

5-10 years :   Higher than all other projections after 2022.

11-18 years : Higher than all other projections after 2032.

19-64 years & 65+ years
                : Virtually in line with GLA 2013 "Central" forecast.

All years   : Virtually in line with GLA 2013 "High" forecast.

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Observations

Trend-based High   - Optimistic estimations of population growth

Trend-based Central   **- Future housing need; in areas with rising household sizes**

Trend based Low   - Lower estimation of population growth

SHLAA DCLG-linked   - Lowest "baseline" compared to others.

SHLAA HH Size Capped - Falling households sizes ; pan-London comparisons

Central (revised fertility) – Early years (0-4 years) work area