

## 8: London's people

### 8.1 Key points

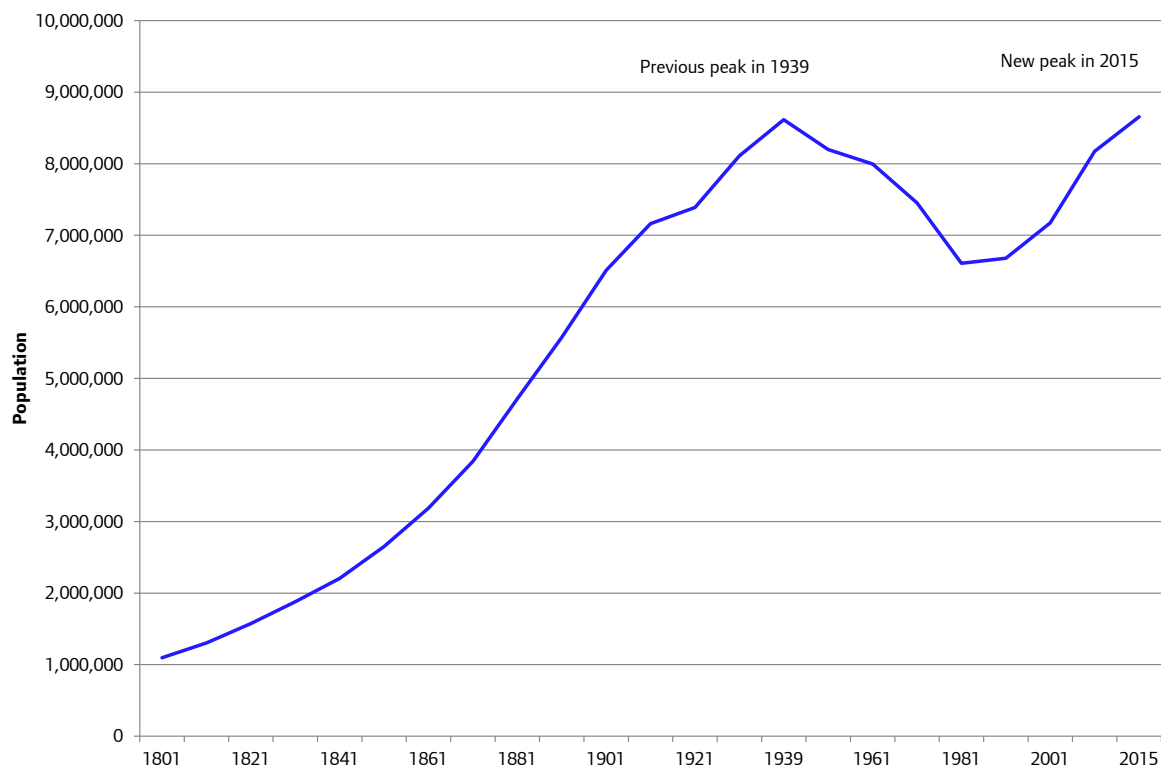
- London's population is bigger than ever before with approximately 8.7m residents, exceeding the previous peak seen in 1939. The population is not distributed evenly across the region with more densely populated areas in inner London.
- London has a younger age structure than the UK as a whole. This is driven by the tendency for young adults to flock into London to study and to work.
- Looking to the future, London's population is set to continue to grow and evolve. In fact, it is projected to increase to approximately 10.5m inhabitants by 2041.
- Not only is London's population rising, it is also getting older. By 2041, 16 per cent of London's population is projected to be aged 65 years and above, compared with 11.6 per cent in 2015.
- London's school-age population is also growing and is projected to number nearly 1.4m by 2041, bringing with it its own challenges for London in terms of school place planning.
- London's population is characterised by significant flows. Since 1996, London's population has grown largely as a result of international migration – firstly through its direct impact on flows and, subsequently, through its knock-on impact on the capital's natural population change.
- London's high international inflow means it has become something of a hub for foreign-born communities. Approximately 3.1m people living in London were born abroad (37 per cent of the total population), with just under half having arrived in the UK in the 10 years leading up to the 2011 Census.
- All of the above has made London a city renowned for its diversity. Some 40 per cent of its residents perceived themselves as Black, Asian or Minority Ethnic.
- The average household size for London was 2.47, up from around 2.4 in 2001, and was the largest of any region in England and Wales. The national average was 2.36 in 2011. However, London is a city of contrasts and includes the local authorities with both the lowest and highest average household sizes in the UK.

- Approximately one-in-three households in London (31.6 per cent) were made up of just one person, while 36.7 per cent were couple households.
- Some 30.9 per cent of households contained at least one dependent child. Moreover, 74.4 per cent of parents in couple families were working compared with 53 per cent of lone parents.
- At the time of the 2011 Census, half of households were owner occupied while 26 per cent were private rented and 24 per cent social rented. Comparing this with the national average, owner occupation was much less common in the capital with a higher proportion renting their accommodation than nationally.
- Whilst 8.7m people lived in London in 2015, London's workday population grows as a result of commuters flooding in for work and international and domestic tourists coming to visit. This means that the total number of people in London on any given day could be 10.3m in total.

## 8.2 London's demography

In 2015, approximately 8.7m people were living in London making it larger than ever, exceeding the previous population peak in 1939 (Figure 8.1). To give an idea of the scale, the number of people living in London is of a comparable size to the entire population of Austria or Switzerland<sup>1</sup> (despite Austria and Switzerland being far larger in land terms).

**Figure 8.1: Total population of Greater London, 1911 to 2015**



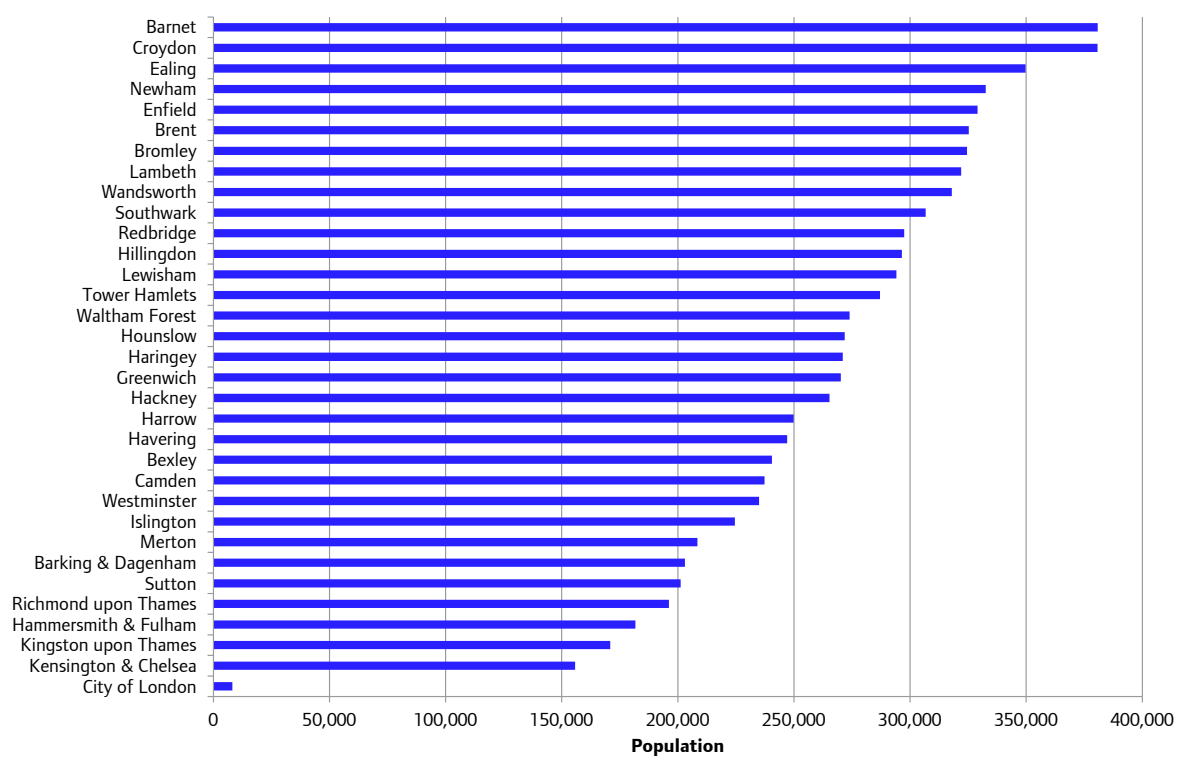
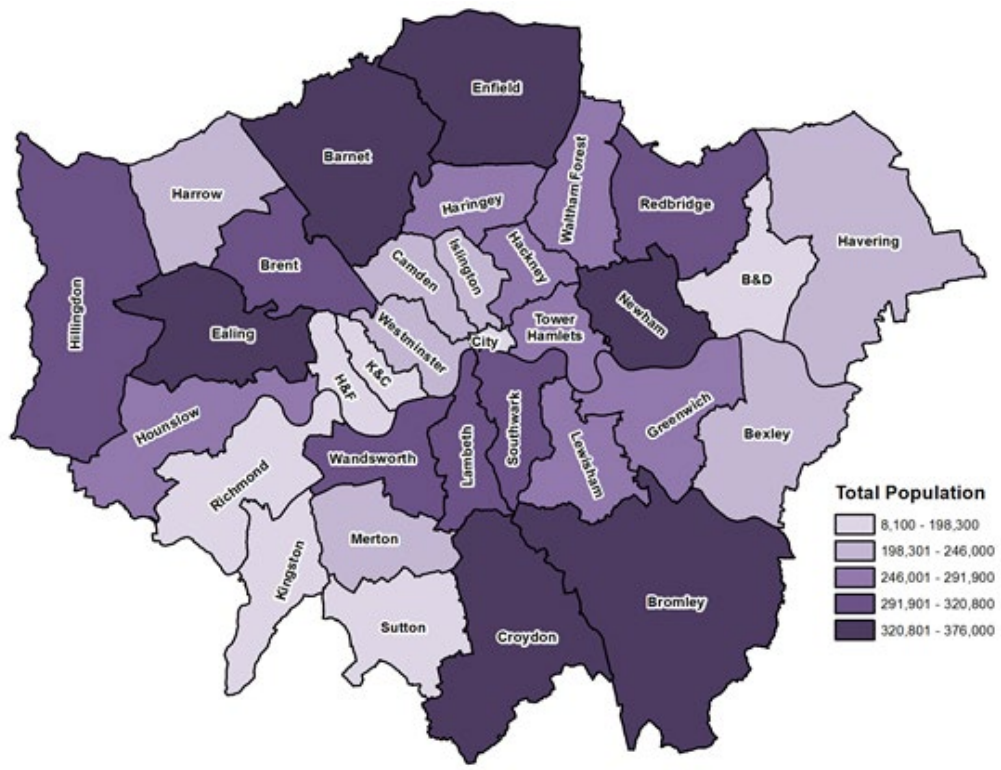
Source: ONS Census, GLA trend-based population projections (short-term migration scenario)

Between 1939 and the 1981 there was a fall in the population, driven by policy changes implemented after the Second World War that resulted in people moving out of London into the newly built “New Towns” surrounding London (such as Basildon and Crawley)<sup>2</sup>.

However, since the late 1980s, London's population has seen unprecedented growth driven by the city's strong economic performance, an improving image and, most significantly, large inflows of international migrants.

Map 8.1 shows how London's population is distributed across its boroughs. Unsurprisingly, the spatially larger outer London boroughs tend to have the greater number of residents with the notable exception of Newham – an inner London borough with a similar population size to the significantly larger boroughs of Bromley and Ealing.

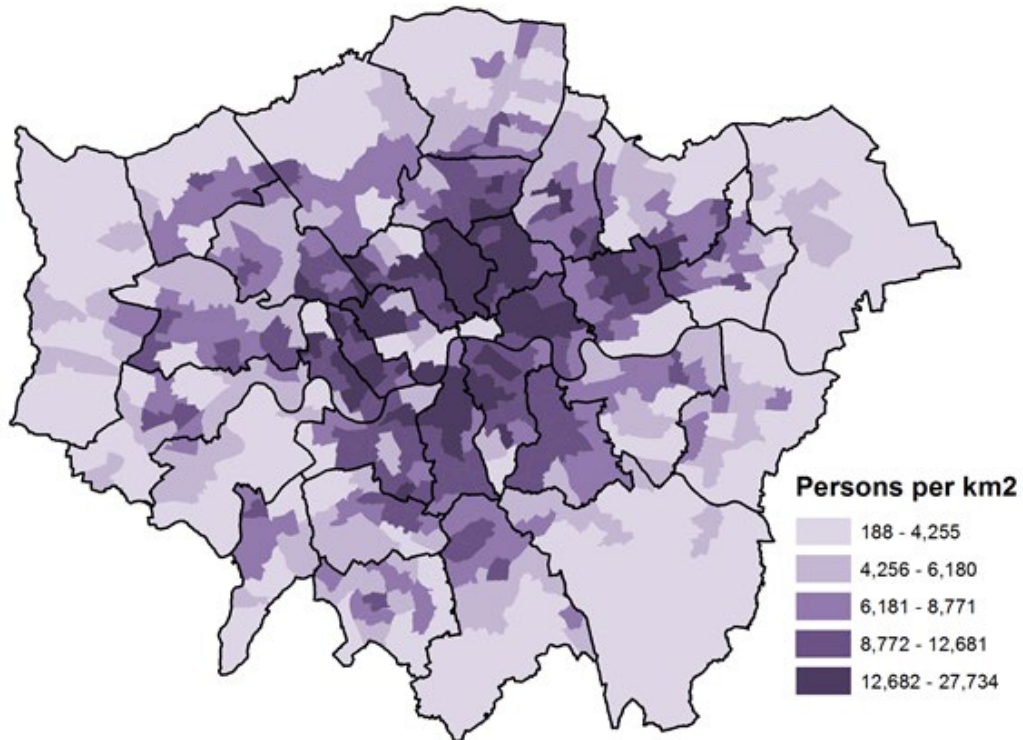
Map 8.1 and Figure 8.2: Total population by London borough in 2015



Source: GLA trend-based population projections (short-term migration scenario)

Looking at population density gives us a different picture. Map 8.2 shows that the more densely populated areas tend to be in inner London. The most densely populated boroughs in London are Islington (15,112 persons per square kilometre), Tower Hamlets (14,522 persons per square kilometre) and Hackney (13,918 persons per square kilometre). Across the whole of London the population density is 5,506 persons per square kilometre. For further analysis of population densities, including international comparisons, refer to Chapter 4.

**Map 8.2: Persons per km2 by London ward in 2011**



Source: GLA Ward Population Projections

**Table 8.1: Total population and density by borough in 2014**

Borough	Population, 2014	Area (km <sup>2</sup> )	Population Density (persons per km <sup>2</sup> )
Barking and Dagenham	203,060	36	5,626
Barnet	380,778	87	4,390
Bexley	240,562	61	3,972
Brent	325,257	43	7,523
Bromley	324,558	150	2,161
Camden	237,364	22	10,890
City of London	8,211	3	2,833
Croydon	380,749	87	4,401
Ealing	349,727	56	6,299
Enfield	329,038	81	4,071
Greenwich	270,187	47	5,707
Hackney	265,317	19	13,918
Hammersmith and Fulham	181,718	16	11,078
Haringey	270,983	30	9,158
Harrow	249,840	50	4,950
Havering	247,058	112	2,199
Hillingdon	296,490	116	2,563
Hounslow	271,843	56	4,856
Islington	224,554	15	15,112
Kensington and Chelsea	155,739	12	12,840
Kingston upon Thames	170,899	37	4,588
Lambeth	321,984	27	12,005
Lewisham	294,096	35	8,368
Merton	208,454	38	5,543
Newham	332,583	36	9,181
Redbridge	297,447	56	5,273
Richmond upon Thames	196,152	57	3,416
Southwark	306,745	29	10,631
Sutton	201,207	44	4,589
Tower Hamlets	287,093	20	14,522
Waltham Forest	273,934	39	7,058
Wandsworth	318,016	34	9,282
Westminster	234,988	21	10,941
Inner London	3,439,389	319	10,772
Outer London	5,217,240	1,253	4,164
<b>London</b>	<b>8,656,629</b>	<b>1,572</b>	<b>5,506</b>

Source: GLA trend-based population projections (short-term migration scenario)

A more detailed breakdown using output areas is shown in Chapter 4 and highlights the areas of employment, parks and green spaces where no residents live.

### 8.2.1 Age structure

London has a younger age structure than the rest of England and Wales. The median age of Londoners in 2014 was 34 years old compared with the national average of 39 years old. This is driven by the tendency for young adults to flock into London to study and to work.

Figure 8.3 shows that London had a much higher proportion of residents aged between 25 and 45 years old compared with the England and Wales average in 2014.

**Figure 8.3: Age structure of London’s population compared to England and Wales in 2014**

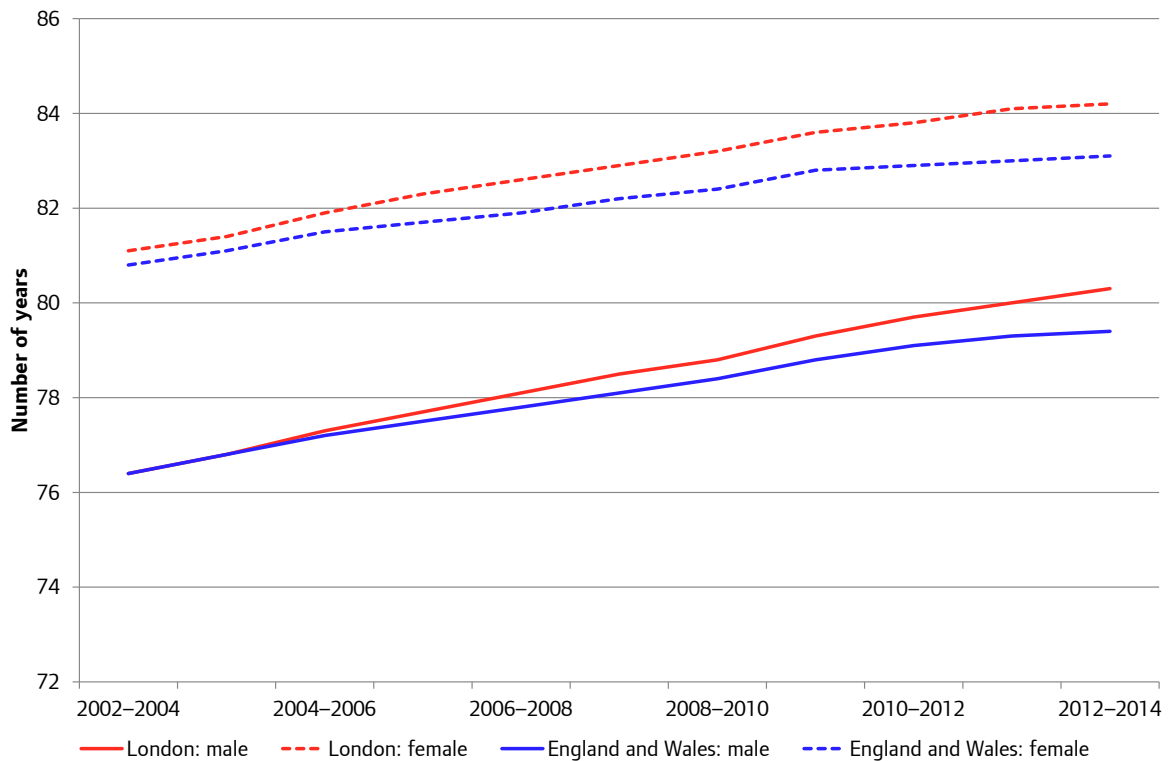


Source: ONS Mid-year Estimates 2014

### 8.2.2 Life expectancy

Life expectancy at birth in London has been steadily increasing for both males and females and has risen faster in recent years when compared to life expectancy at birth in England and Wales (Figure 8.4). A baby boy born in London during 2012-2014 could expect to live 80.3 years compared with 79.4 years for a baby boy born in England and Wales. For a new-born baby girl in London this rises to 84.2 years and 83.1 years in England and Wales. That said, the gap between male and female life expectancy has also fallen and females in London are now expected to live only 3.9 years longer than their male counterparts.

However, there is a high level of variation regarding life expectancy within London, which will be covered in Chapter 10.

**Figure 8.4: Life expectancy at birth, London and England & Wales, 2002-2004 to 2012-2014**

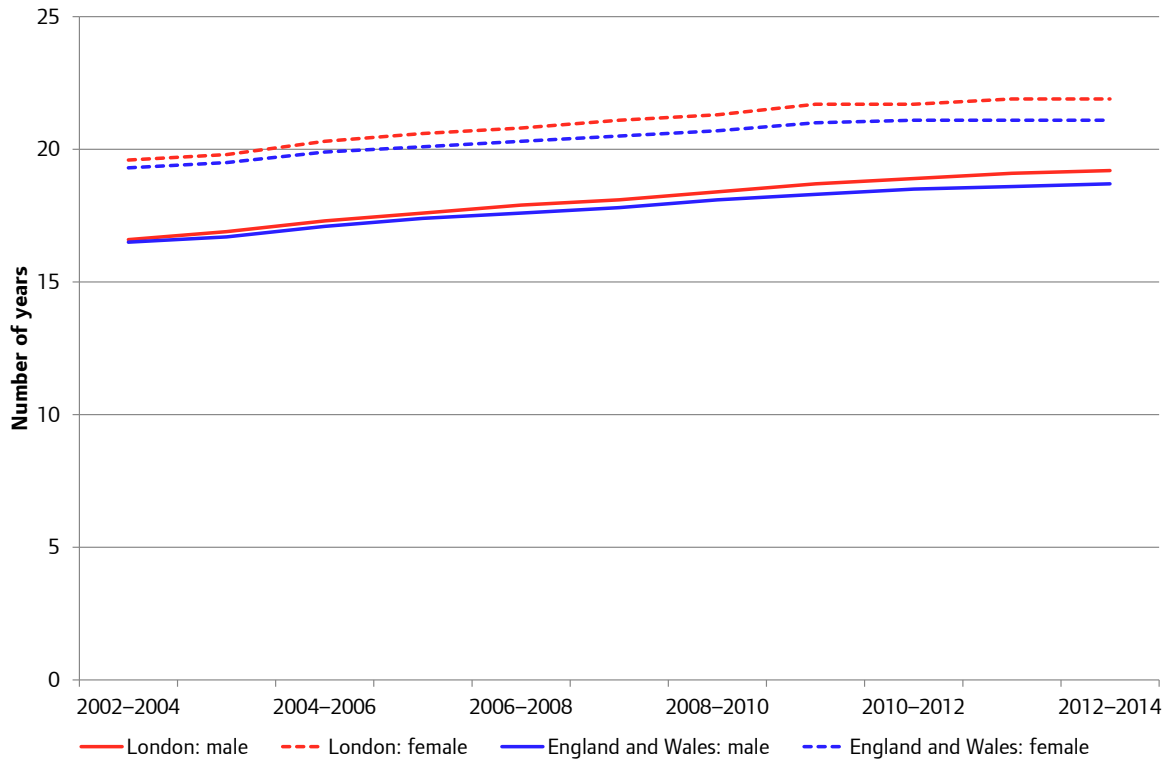
Source: ONS Life Expectancy at Birth

Life expectancy at age 65 for Londoners has also been rising (Figure 8.5). In 2012-2014, females aged 65 could expect to live a further 21.9 years (age 86.9) and males 19.2 years (age 84.2). The difference between the two has also been closing and was 2.7 years in 2012-2014.

There is greater difference in life expectancy at age 65 when comparing London and England and Wales as opposed to life expectancy at birth (in percentage terms).



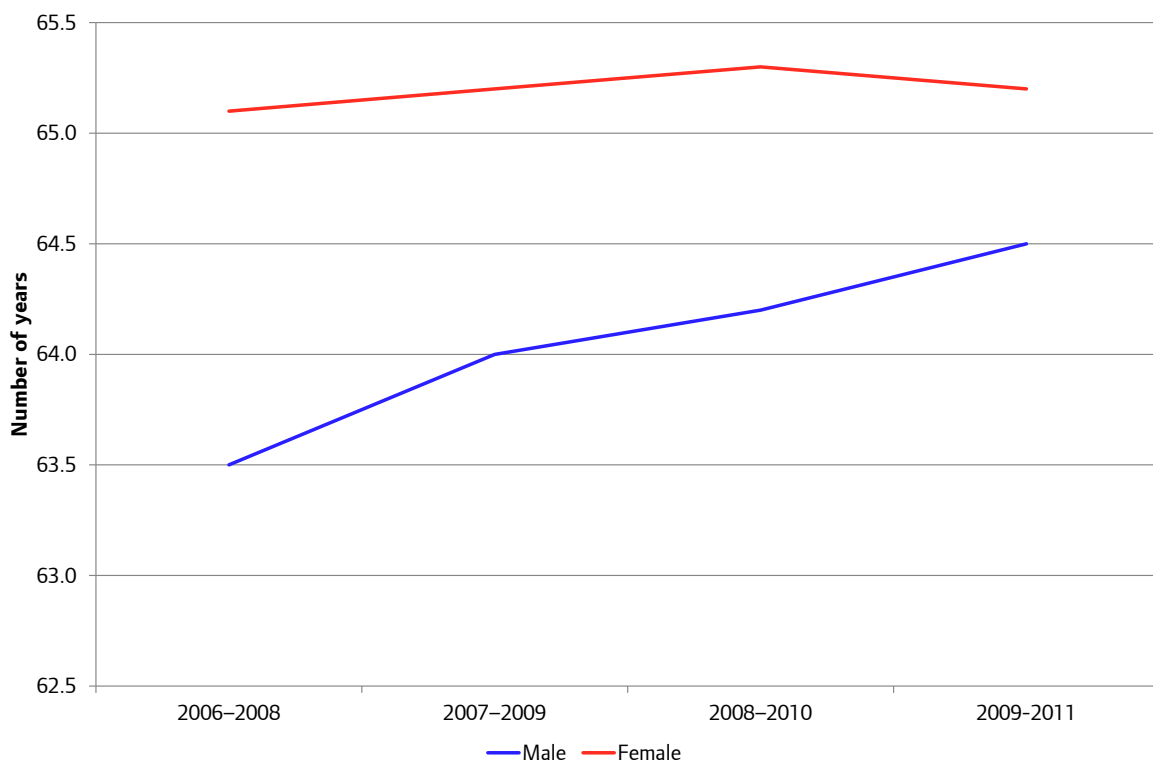
**Figure 8.5: Life expectancy at age 65 in London and England and Wales, 2002-2004 to 2012-2014**



Source: ONS Life Expectancy at Age 65

In London, disability-free life expectancy (DFLE)<sup>3</sup> for males at birth was 64.5 years and for females 65.2 years in 2009-2011 (Figure 8.6). Despite having a shorter DFLE, males can expect to spend 81 per cent of their life free from disability compared with 78 per cent for females.

**Figure 8.6: Disability free life expectancy at birth in London, 2006-2008 to 2009-2011**

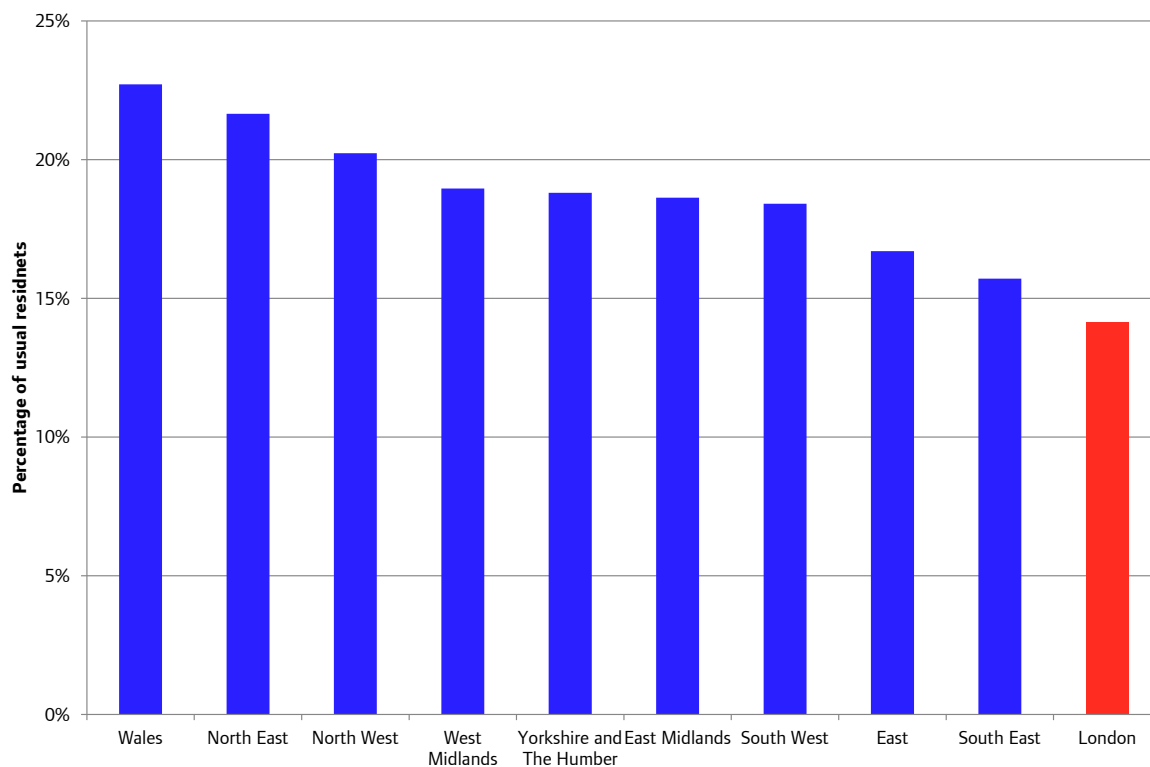


Source: ONS Disability free life expectancy at birth

### 8.2.3 Health and disability

London saw 1.16m (14 per cent of residents) reporting that they had a long-term health problem or disability which limited their day-to-day activities. This proportion was below the national average (18 per cent) and was lower than every other region in England and Wales (Figure 8.7).

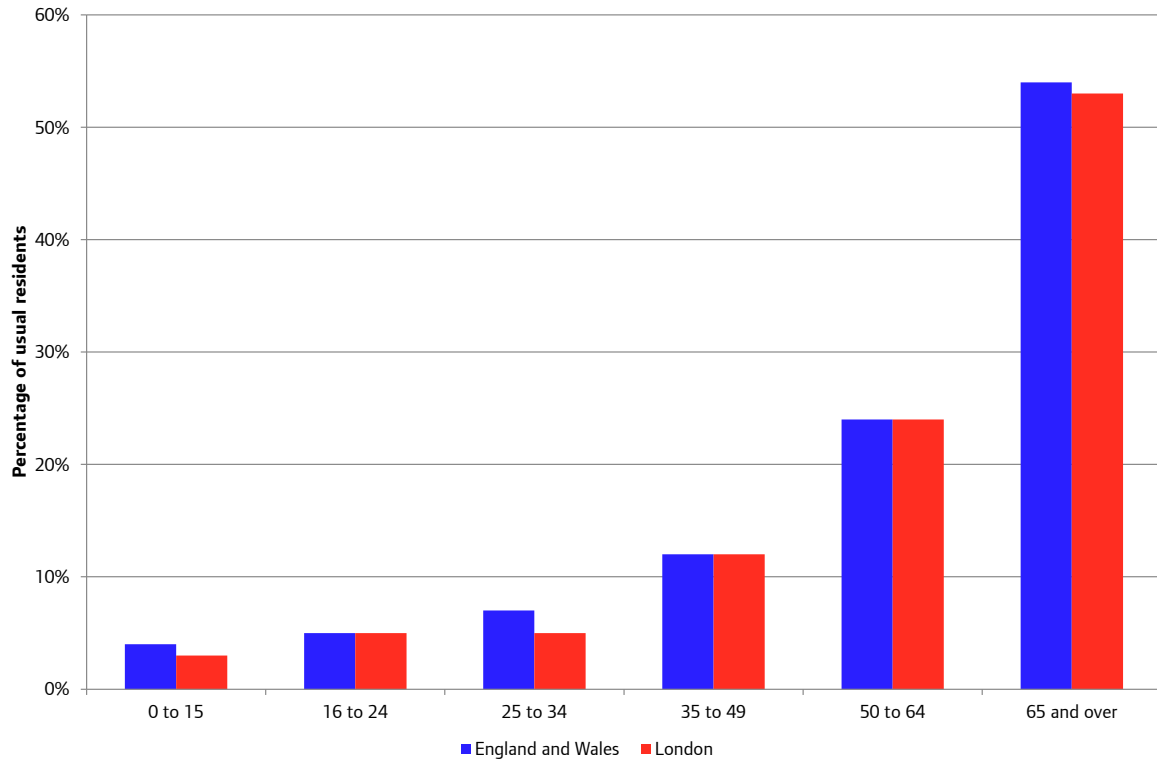
**Figure 8.7: Percent of usual residents with a limiting long-term health problem or disability by region in 2011**



Source: ONS Census 2011

This was mostly due to London's comparably younger age structure. When looking at individual age groups the rate of Londoners with limiting long-term health problems did not vary significantly from the national average (Figure 8.8).

**Figure 8.8: Percent with a limiting long-term health problem or disability by age in London and England and Wales in 2011**

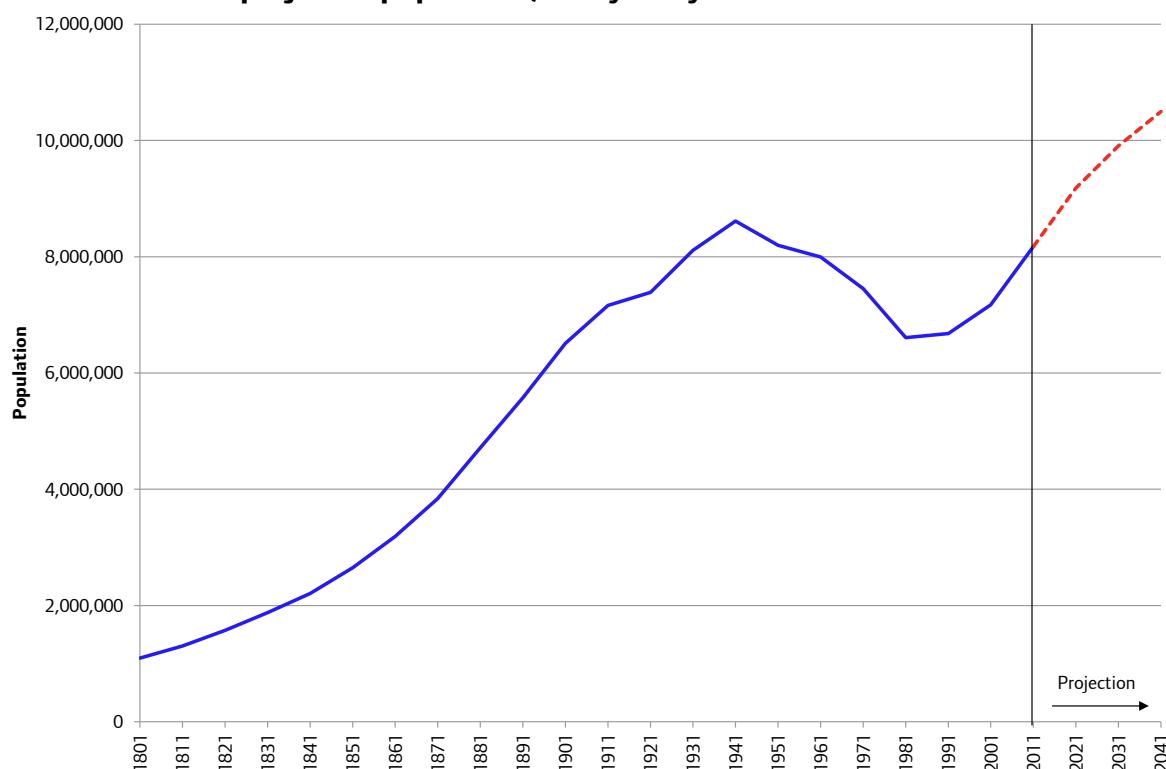


Source: ONS Census 2011

### 8.3 London's future population

Looking to the future, London's population is set to continue growing. In fact, it is projected to increase to approximately 10.5m inhabitants by 2041 (Figure 8.9)<sup>4</sup>.

**Figure 8.9: London's projected population, every ten years between 1801 and 2041**

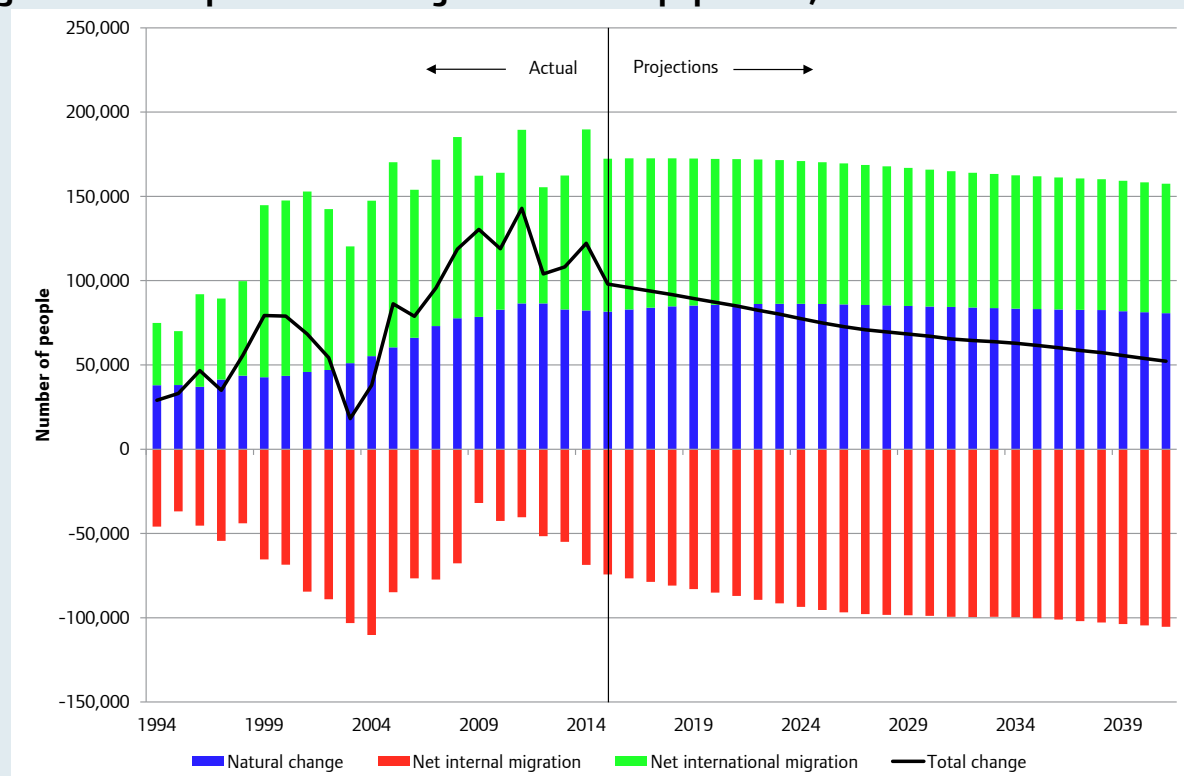


Source: ONS Census (historic data), GLA 2015 trend-based population projections (long-term migration scenario)

#### Box 8.1: Possible variations to London's population projections

The population projection discussed in this section is just one possible scenario. However, given the amount and accuracy of currently available information, this could be considered to be the most likely. This box simulates other possible scenarios for London's future population.

Although this is discussed in greater detail in the next section, the main component of London's population growth has historically been net international migration, followed by natural change (i.e. the difference between births and deaths). The latest population projections suggest that this will continue to be the case in the future (Figure 8.10). However, from 2022, natural change will become the biggest component to population growth mainly reflecting an expected fall in the net number of international migrants, down from 107,400 in 2014 to 76,800 in 2041. This, itself, is due to international in-migration expected to remain fixed at 195,400 over the projection period, whereas out-migration is expected to rise from 93,500 in 2014 to 118,600 in 2041.

**Figure 8.10: Components of change for London's population, 1994 to 2041**

Source: ONS Mid-Year Estimates, GLA 2015 trend-based population projections (long-term migration scenario)

Meanwhile, the Government had previously set itself a target of reducing the UK's net international migration to the "tens of thousands" by 2020<sup>5</sup>. Moreover, this target has recently been reconfirmed, though no specific date was given for when it should be achieved<sup>6</sup>. Subsequently, simulations of the population projections can be constructed to show the various ways that this target can impact London.

In creating these scenarios, the GLA 2015 trend-based population projections (long-term migration scenario) are used as the starting point. Within these projections, estimates of natural change and net internal migration remain the same as those in the original projections – that is, they change at the same rates as shown in Figure 8.10 – and only net international migration is changed. Given the uncertainty of the impact of the EU referendum result, this has also not been included in the original projections or scenarios and instead historical trends are assumed to remain true. Three models are constructed whereby it is assumed that:

### Scenario 1

- The Government achieves its target of reducing the UK's net international migration to "tens of thousands" (assumed to be equal to 99,000 pa) by its original target date of 2020.
- London's share of the UK's net international migration remains the same as that for 2014 of 43.1 per cent.
- Subsequently, net international migration to London falls from 107,400 in 2014 to 42,600 in 2020 and remains at this level for the remaining projection period.

### Scenario 2

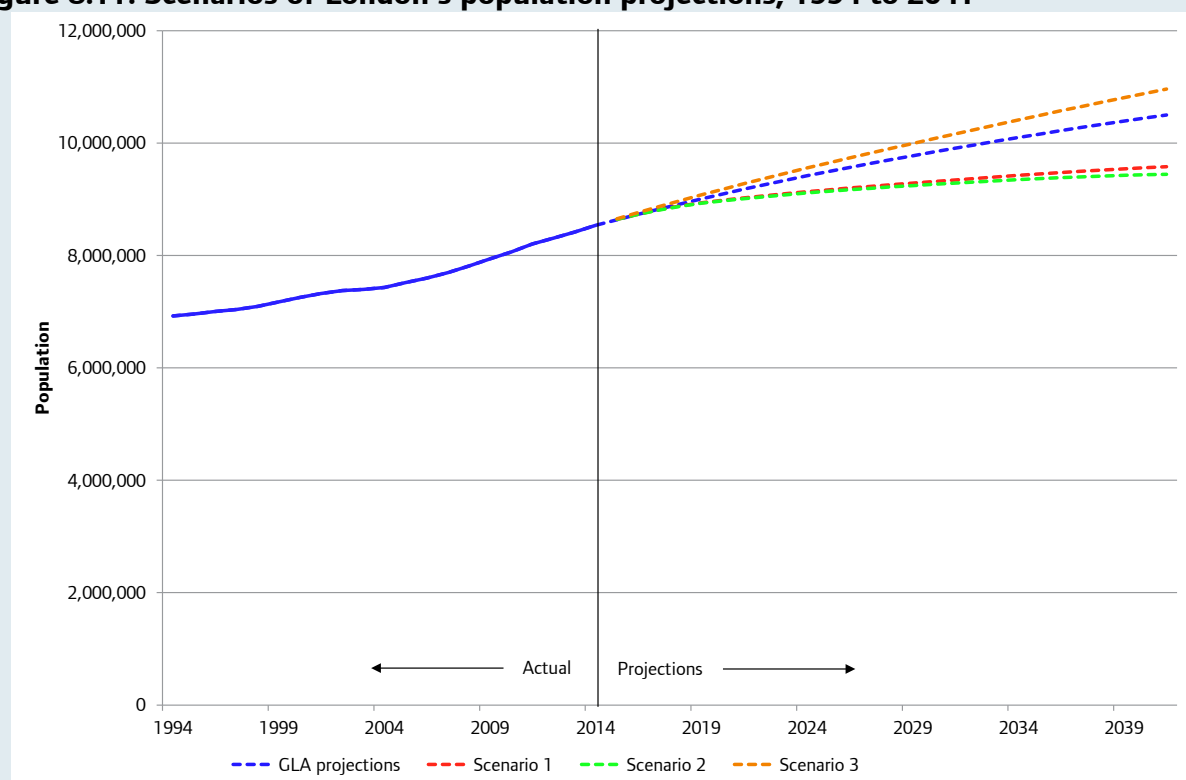
- The Government achieves its target of reducing the UK's net international migration to "tens of thousands" (assumed to be equal to 99,000 pa) by its original target date of 2020.
- London's share of the UK's net international migration follows the historic (downward) trend between 2002 and 2014.
- Therefore, net international migration to London falls from 107,400 in 2014 to 40,600 in 2020 and 33,300 in 2041.

### Scenario 3

- The Government achieves its target of reducing the UK's net international migration to "tens of thousands" (assumed to be equal to 99,000 pa) by its original target date of 2020.
- All of the UK's net international migration occurs in London, so net international migration falls from 107,400 in 2014 to 99,000 in 2020 and remains at that level for the remaining projection period.

Given these assumptions, Figure 8.11 shows the various population projections for London up to 2041. The first two scenarios produce lower population estimates than the original projection of around 919,600 and 1.1m respectively. In contrast, the third sees an increase of approximately 461,600. This is mainly a reflection of London's share of the UK total of net international migration remaining broadly the same in the first two, but increases to 100 per cent for the third.

**Figure 8.11: Scenarios of London's population projections, 1994 to 2041**

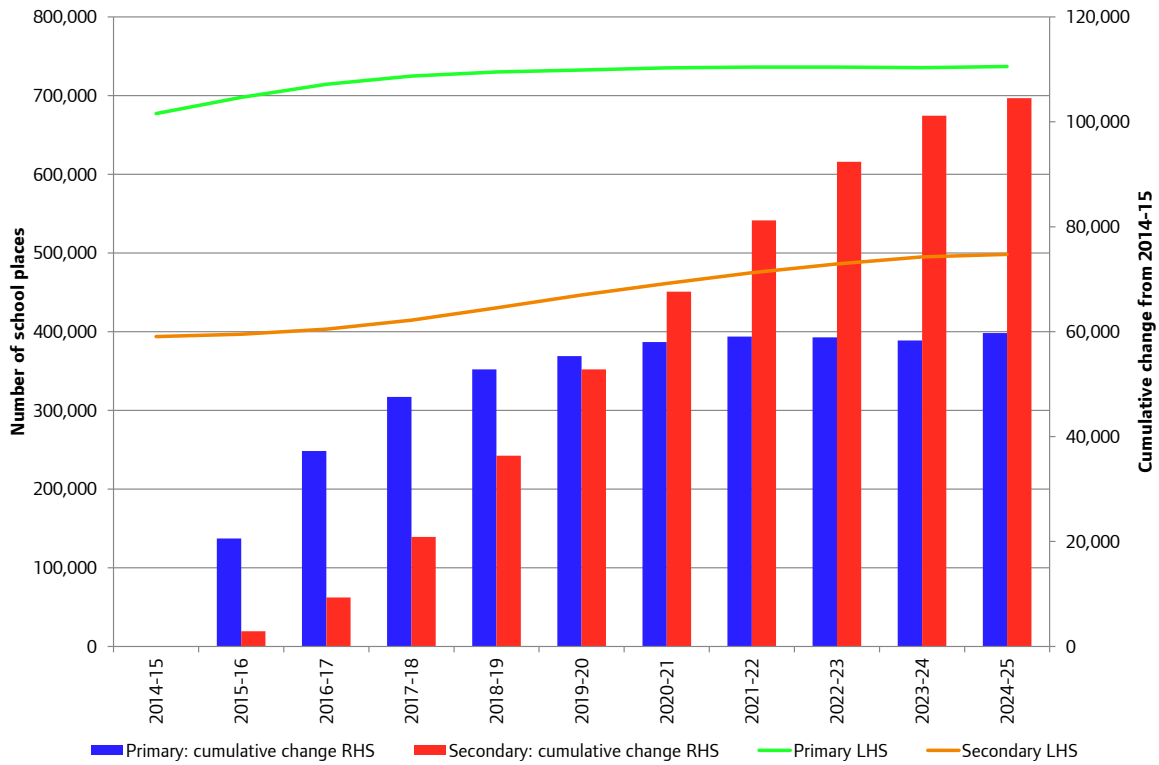


Source: ONS Census, GLA 2015 trend-based population projections (long-term migration scenario)

Not only is London's population rising, it is also getting older. By 2041, 16 per cent of London's population is projected to be 65 and over compared to 11.6 per cent in 2015. This means that the number of over-65s in London will go up by over two-thirds over the period. However, it is the number of over-90s – the so-called 'baby boomers' born post-war – for whom the greatest increases are projected, with the number set to more than double to make-up 1.5 per cent of London's population by 2041.

London's school-age population<sup>7</sup> is also growing and is projected to number nearly 1.4m by 2041, bringing with it its own challenges for London in terms of school place planning. Figure 8.12 show that there are currently 677,250 primary<sup>8</sup> and 393,750 secondary<sup>9</sup> state school places in London during the 2014-15 academic year. However, this would need to rise by 60,000 (8.8 per cent) and 105,000 (26.5 per cent) respectively by the 2024-25 academic year to meet the growth in demand.

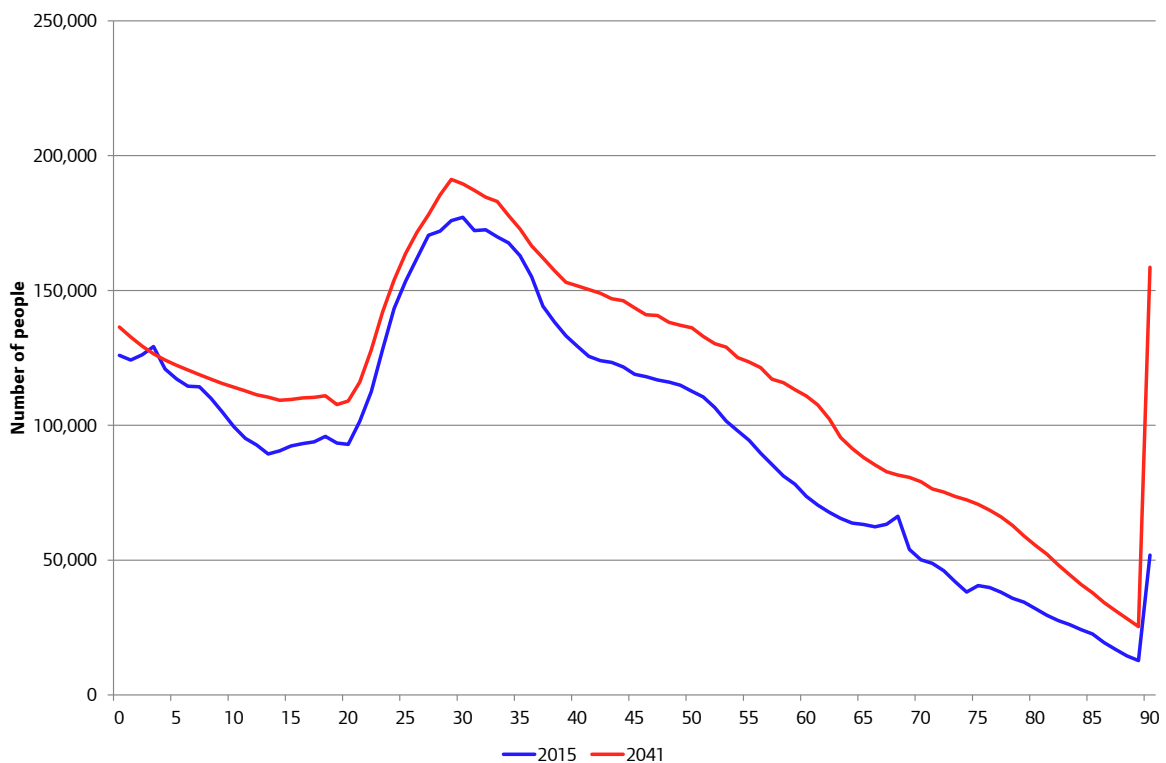
**Figure 8.12: Projected additional demand for state school places in London, 2014-15 to 2024-25 academic years**



Source: GLA Pan-London school place demand model (hybrid static population variant)

London as a major employment centre attracts workers from all over the UK as well as from abroad. Approximately 5.9m of its inhabitants are of working-age<sup>10</sup> and this number is projected to rise to 6.9m by 2041 (Figure 8.13).

**Figure 8.13: Age structure of London’s population, mid-2015 and mid-2041**



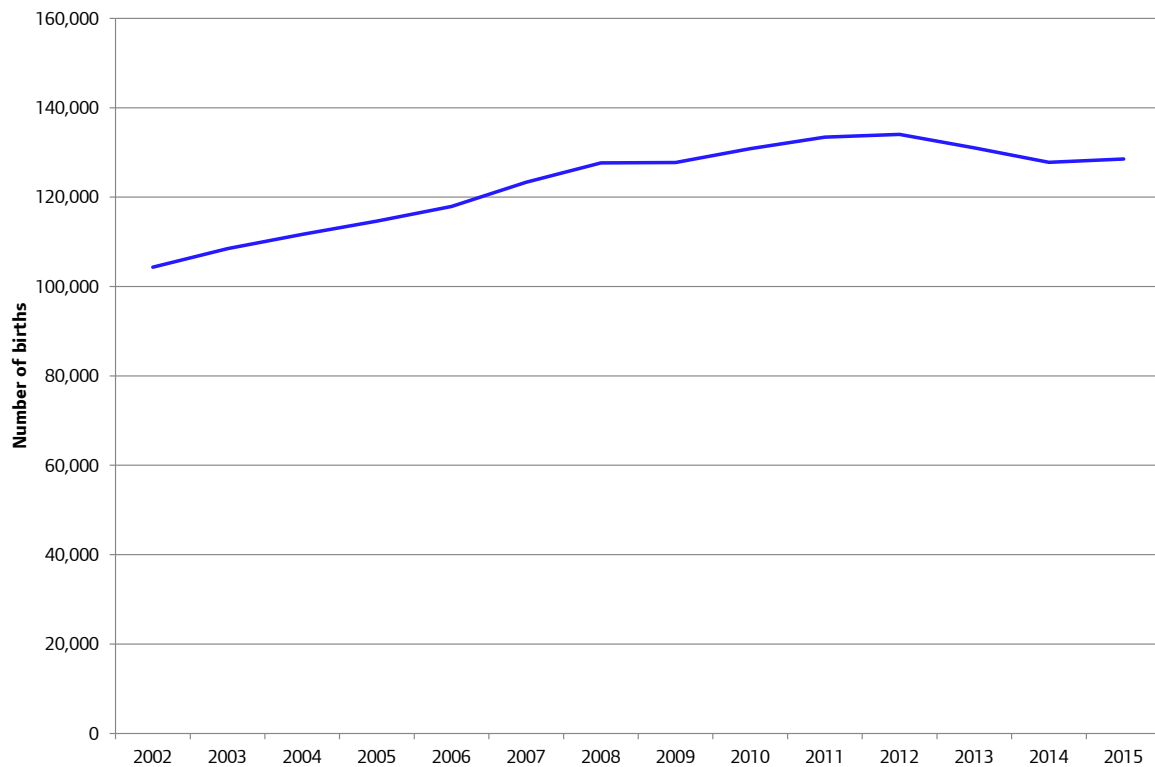
Source: GLA 2015 trend-based population projections (long-term migration scenario)

### 8.3.1 Births

One of the drivers in London's recent population growth has been the considerable rise in the number of births during the 2000s and early 2010s.

In 2012, there were over 134,800 births in London, up nearly 30,000 from the number seen in 2002 (Figure 8.14). Births have since fallen to 128,500 in 2015, suggesting that the peak may be over. However, the impact will be seen for many years as these cohorts move first through the education system before entering the world of work.

**Figure 8.14: Births in London, mid-2002 to mid-2014**



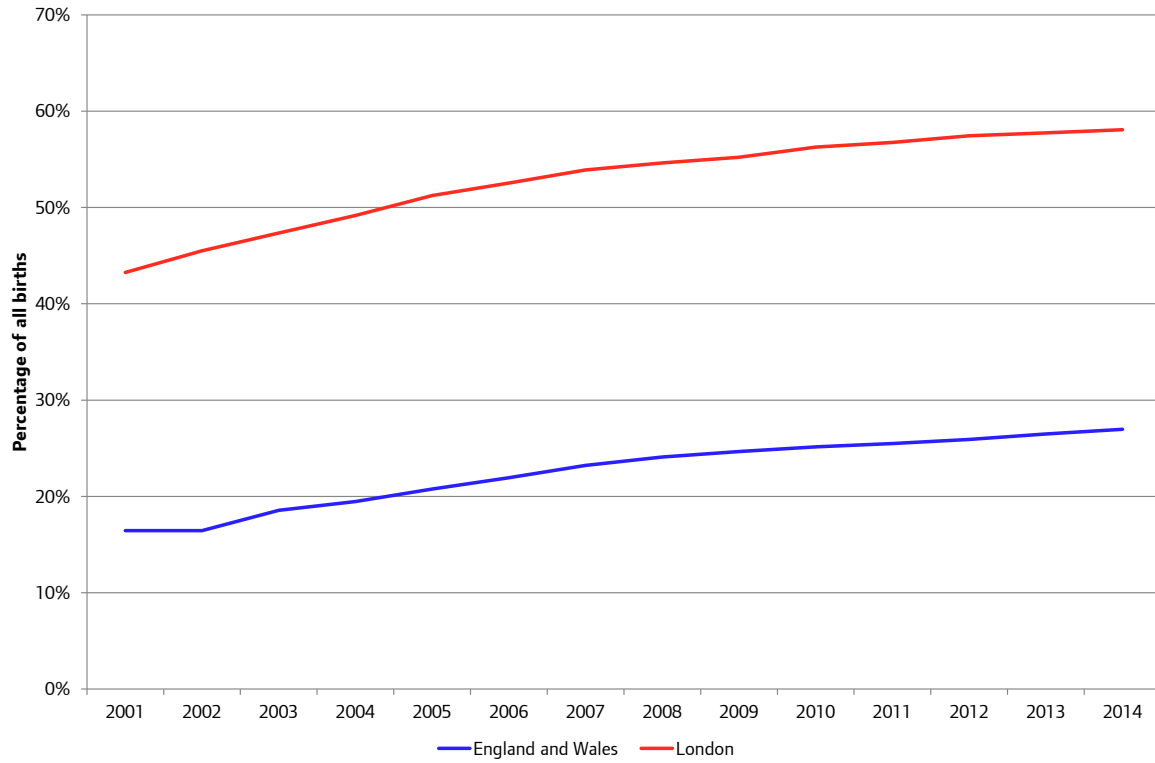
Source: ONS Mid-year population estimates

The standardised mean age of mothers giving birth for the first time was 29.8 years in London during 2013. Comparably, the average for England and Wales was 28.1 years suggesting that women in London start having children later than elsewhere. Moreover, data for England and Wales as a whole shows that the average age of mothers at first birth has also increased over time. For example, the mean age was 26.5 years in 2000 and, going further back, it was 25.8 years in 1940.

Approximately 58.1 per cent of births in London during 2014 were by mothers born outside the UK. This was a larger percentage of births by foreign mothers than that for England and Wales as a whole (27 per cent) as shown in Figure 8.15. Interestingly, the percentage of births by foreign-born mothers has been rising since 2001 for both London and England and Wales as a whole.



**Figure 8.15: Births by foreign-born mothers as a percentage of all births in London and England and Wales, 2001 to 2014**



Source: ONS Parents' Country of Birth

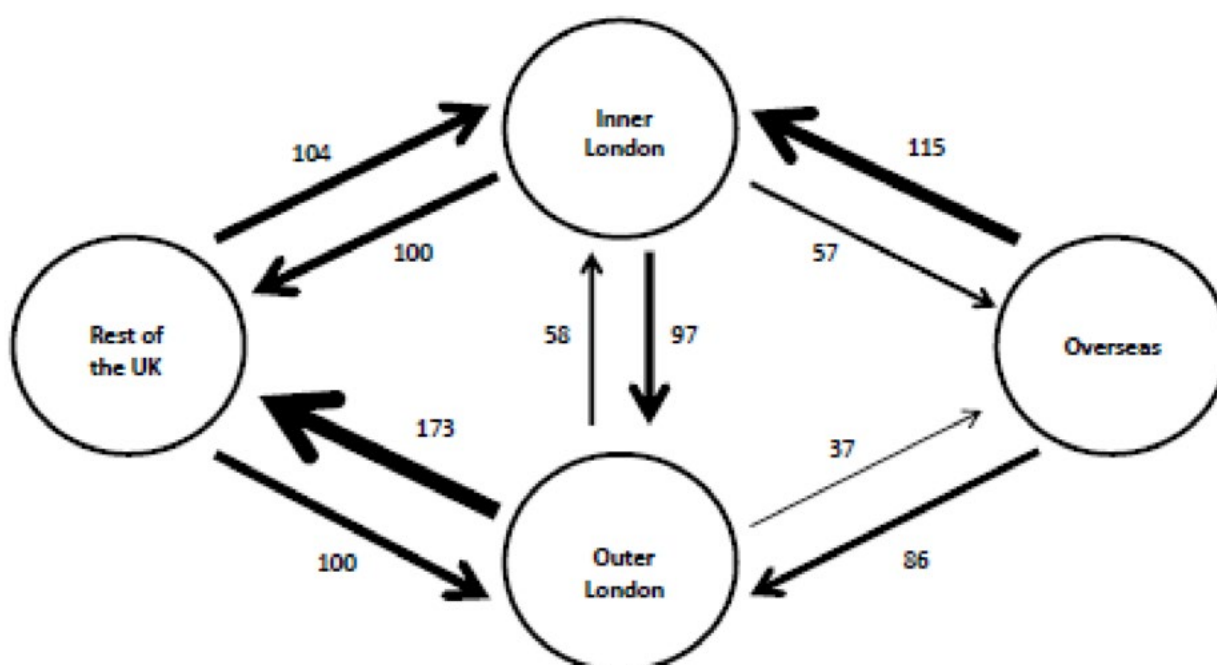
Of the births by foreign-born mothers in London, a third (33.7 per cent) of mothers were from the Middle East and Asia in 2014. This was followed by the EU (27.5 per cent) and Africa (22.9 per cent).

## 8.4 Migration to London

As noted earlier, migration is a significant component of London's population change. Figure 8.16 shows the pattern of both internal and international migration flows in relation to London (split here by inner and outer London) for mid-2014. Approximately half of all migration to London (49.6 per cent) is from overseas, with the other half from the rest of the UK in 2014. Migrants from overseas tend to go to inner London, whereas there is a roughly even split of migrants from the rest of the UK going to inner and outer London. Meanwhile, the outflow of people from London (which includes migrants who have already arrived in London) shows that they are more likely to go to the rest of the UK. In fact, there is a net outflow of people from London to the rest of the UK, whereas in contrast there is a net inflow of international migrants to London.

Figure 8.16 also shows the internal movement of Londoners between inner and outer London. This similarly includes migrants who have already arrived in London. Here there is a stronger movement from inner to outer London than vice versa. For outer London, the outflows are higher to the rest of the UK.

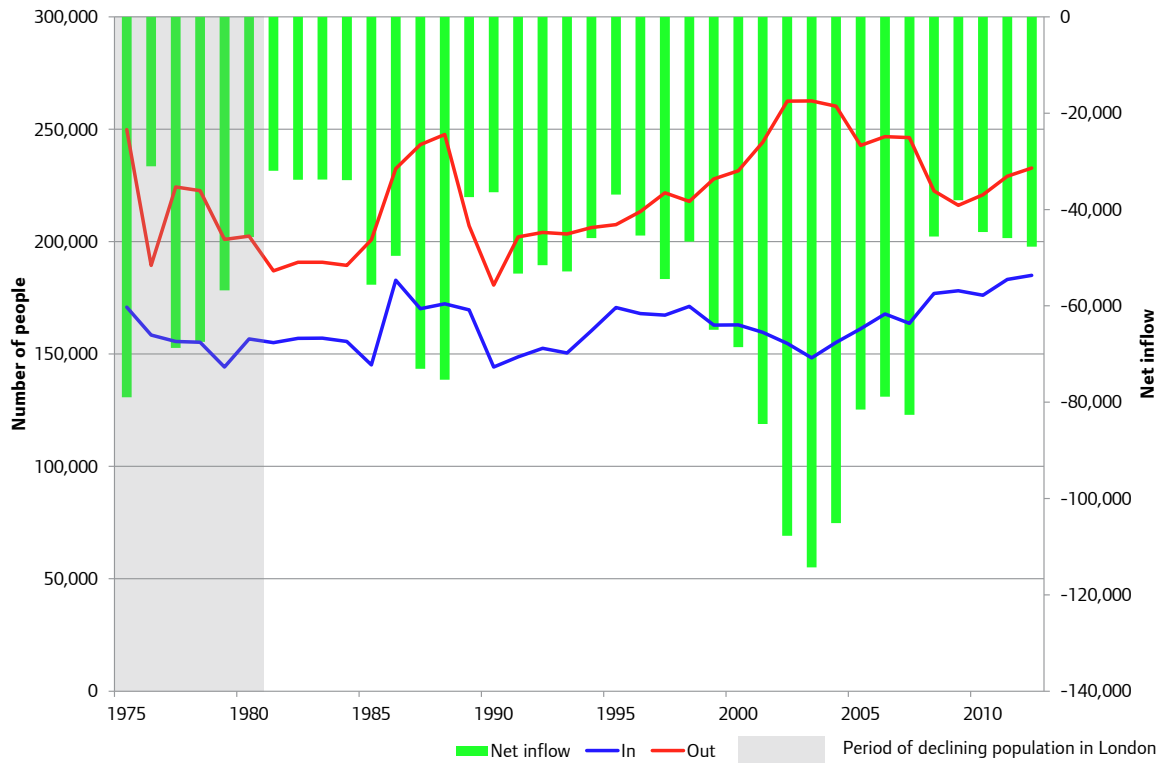
**Figure 8.16: Migration flows in London in mid-2014**



Source: ONS Mid-year population estimates, ONS internal migration estimates

This trend of high domestic migration flows from London to the rest of the UK has been present over the long term. In the years 1975 to 2012, domestic migration from the rest of the UK into London averaged 160,000 per annum (Figure 8.17). Over the same period, average annual outward domestic migration from London was 220,000. Thus on average over this period London lost a net 60,000 people to the rest of the UK each year. Noticeably, this trend of net outflow from London would appear to be quite entrenched in the sense that it occurs even when London's population as a whole is growing or falling.

**Figure 8.17: Domestic migration into and out of London, 1975 to 2012**

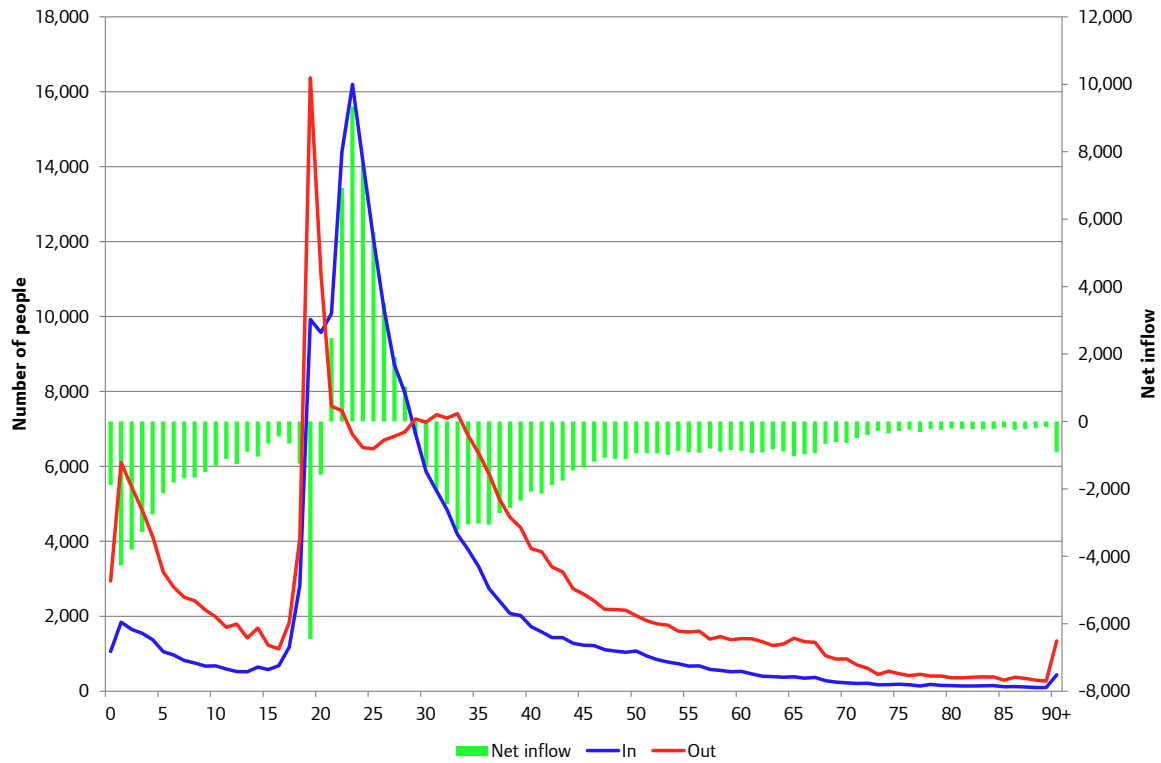


Source: ONS NHS Registrations

One possible reason for why London has a net outflow for domestic migration could be because London acts as an ‘accelerator region’. This is discussed in greater detail in Chapter 9, though there is evidence to suggest that workers come to London to develop their skills and careers before moving to other parts of the UK as suggested by Fielding<sup>11</sup>.

Figure 8.18 shows the age variations in London’s domestic migration flows. London attracts students and young adults from other parts of the UK and loses young children, students and those in their 30s to the rest of the UK.

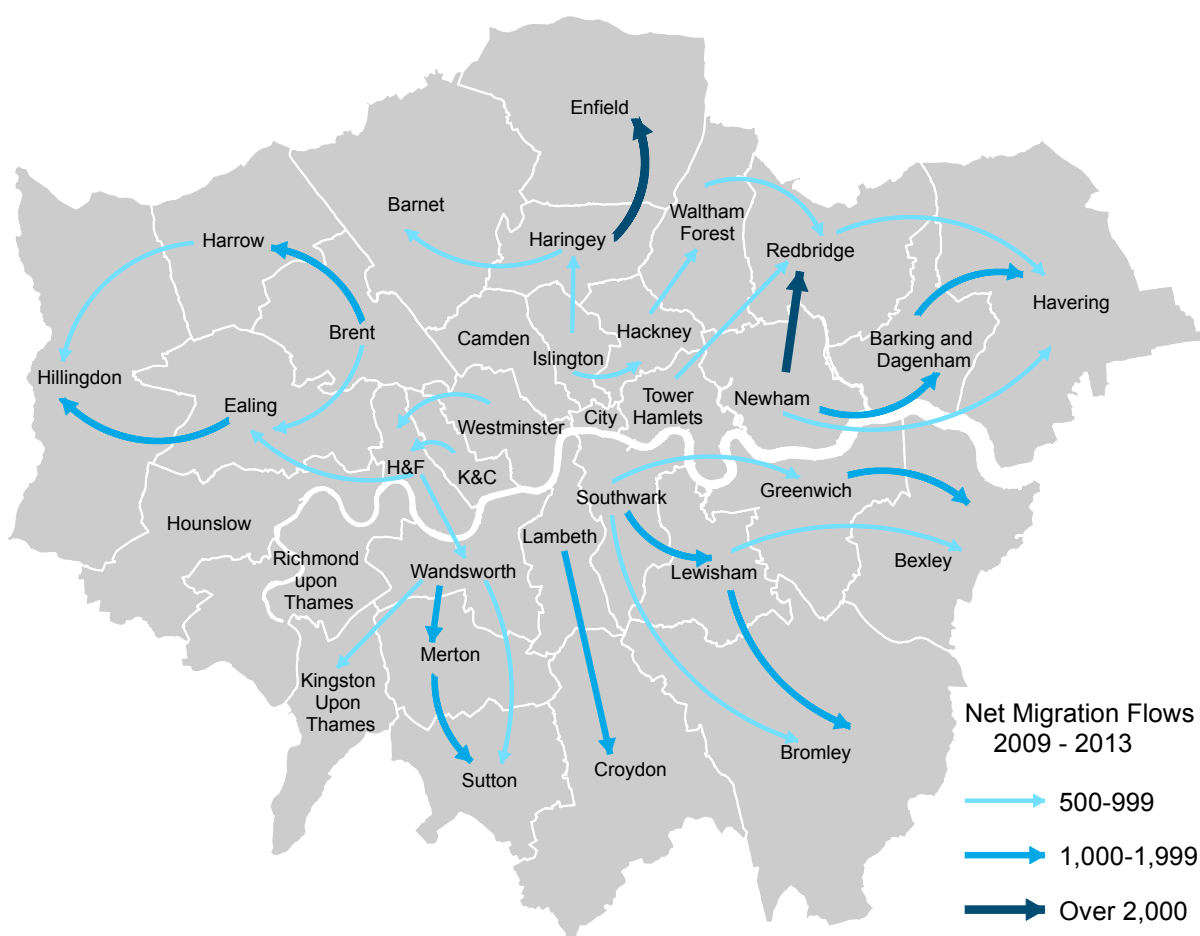
**Figure 8.18: Internal migration flows by age in London in mid-2014**



Source: ONS Internal migration estimates

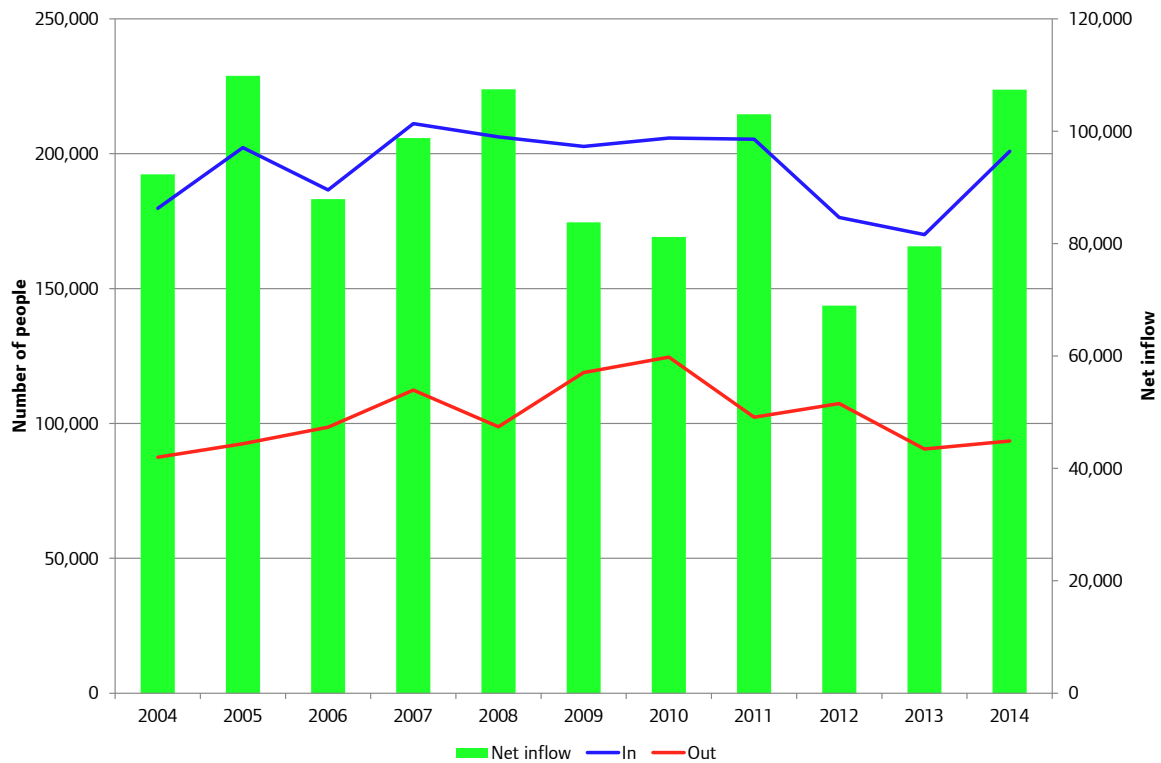
Within London itself, Map 8.3 shows the average annual net migration flows between boroughs for the mid-2009 and mid-2013 period. As shown in Figure 8.16, there was generally a net migration flow from inner London to outer London and this is again shown in this map. Moreover, the largest net migration flows within London was between Haringey to Enfield (an average of 2,320 people) and Newham to Redbridge (an average of 2,252 people).

**Map 8.3: Average annual net migration flow between London boroughs, mid-2009 to mid-2014**



Source: GLA Ward Population Projections

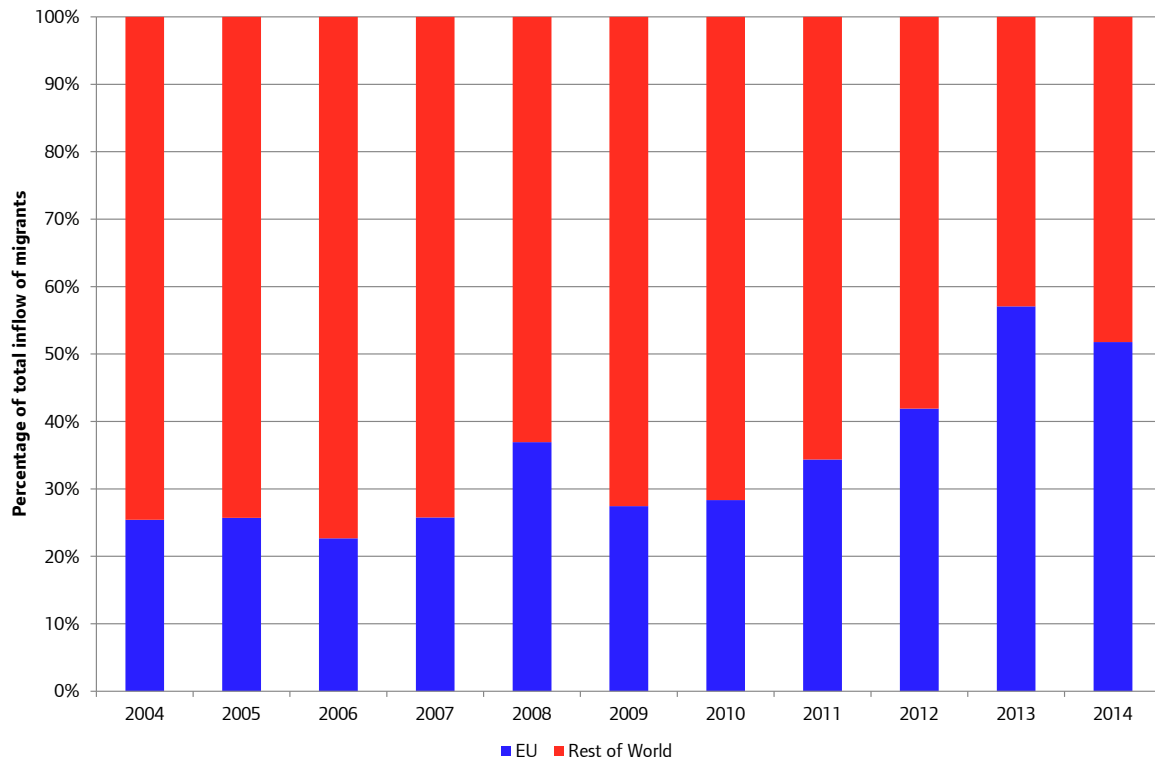
As noted earlier, the domestic population net outflow is offset by a net inflow of migrants to London from outside the UK. London attracts over 170,000 international migrants<sup>12</sup> a year and only around 100,000 people per annum leave London to move abroad (Figure 8.19). This difference – known as international net migration – is therefore positive meaning a significant proportion of London’s population growth is the result of international migration. In 2014, 35 per cent of international in-migrants to the UK headed to London.

**Figure 8.19: International migration in London, 2004 to 2014**

Source: ONS Local Area Migration Indicators

London's appeal – some of which is discussed in Chapter 5 – means that the city attracts people from all over the world. Using estimates from the International Passenger Survey (which means there are slight differences with the long term international migration estimates shown in Figure 8.19), just over half (51.8 per cent) of all international migrants to London were from the EU in 2014. It was only in the previous two years had EU migrants represented more than half of all international migration to London, with this share as low as 22.7 per cent in 2006 (Figure 8.20).

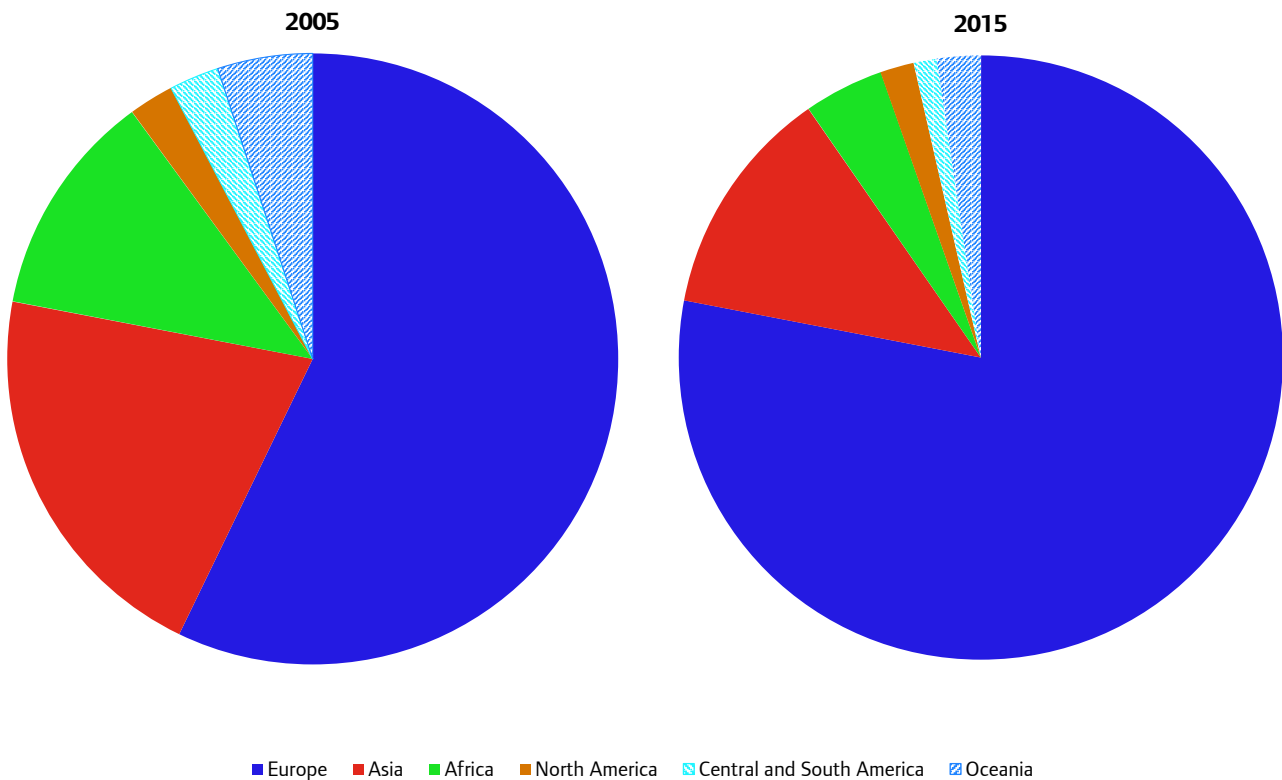
**Figure 8.20: World regional share of international migration to London, 2004 to 2014**



Source: ONS International Passenger Survey

A different measure of international migration is National Insurance Number registrations (NINo). This captures long-term migrants as with the above LTIM/IPS statistics, but also short-term migrants. Therefore, whilst NINo is not a good measure of long-term international migration, it is useful for highlighting changes in migration trends<sup>13</sup>. Figure 8.21 shows a more detailed breakdown of international migration by world region in 2005 and 2015. This shows that the largest inflows of international migrants were from Europe, followed by Asia and Africa. Moreover, the share of migrants from Europe has increased from 57.2 per cent in 2005 to 78 per cent in 2015, whilst the percentage for all other world regions has declined.

**Figure 8.21: World region share of international migration flows (NINo) in London, 2005 and 2015**



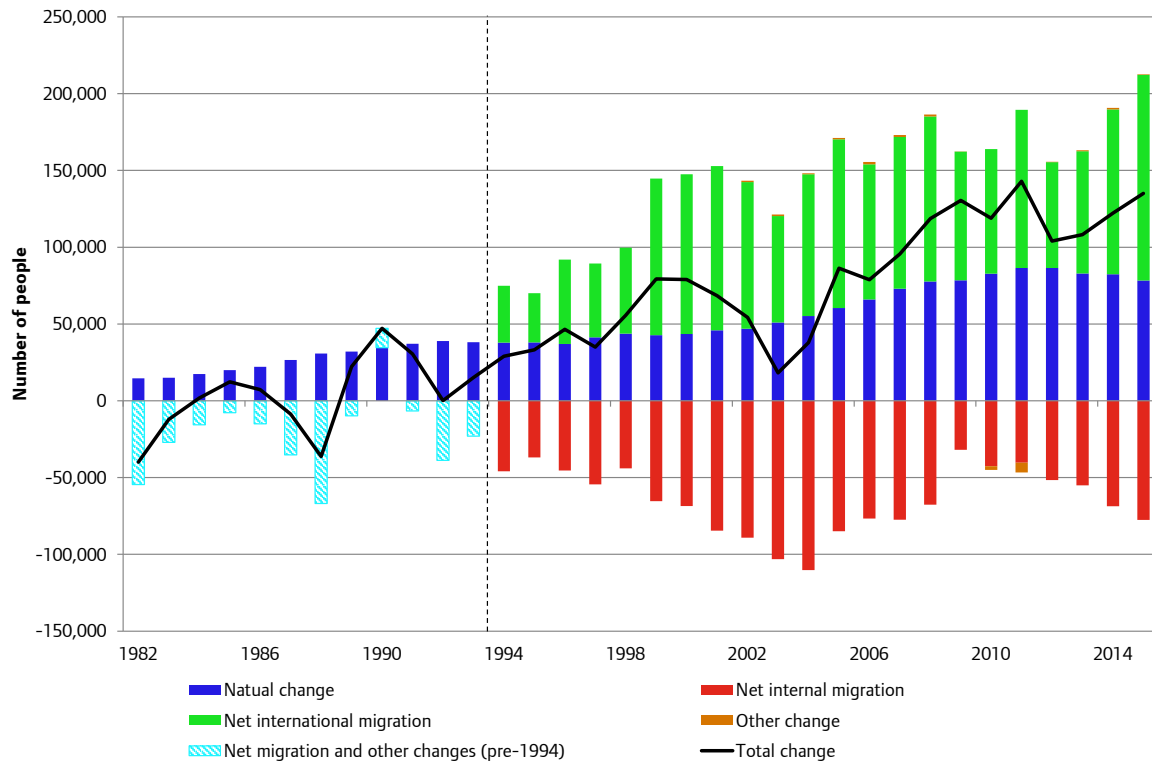
Source: DWP National Insurance Number Registrations

All this information can be brought together to show the annual change in London's population between 1982 and 2015 (Figure 8.22). Net international migration is one of the main contributors to London's population growth over this time adding on average 95,200 more people per annum over the past decade. Natural change was also a contributor to population growth, but international migration has exceeded this as the main driver in each year between 1996 and 2009, as well as 2014 and 2015. That means that 2010 was the first year in more than a decade when natural change contributed more to London's population growth than net international migration and mainly a reflection of a drop in migration flows.

Offsetting net international migration and natural change was net internal migration where London has historically seen a net flow of people leaving the capital to other parts of the UK. Therefore, this has a negative effect on London's population. However, there are considerable challenges in distributing long-term migration flows to different areas in the UK as the area of intended or initial arrival can often differ to the area of residence (i.e. secondary migration).



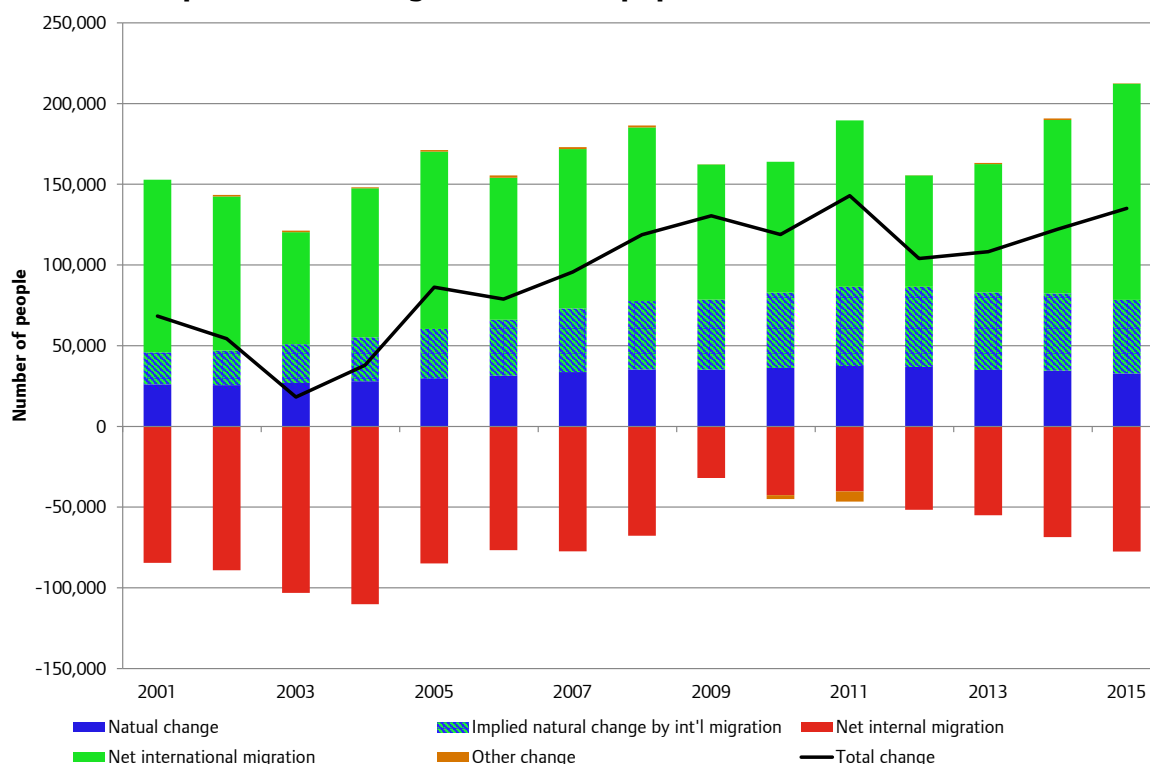
**Figure 8.22: Components of change in London’s population, 1982 to 2015**



Note: mid-year estimates.

Source: ONS Mid-year population estimates, Office of Population, Census and Surveys

International migration also further contributes to London’s population growth through natural change – that is, international migrants also contribute to London’s birth and death rates which, as births tends to exceed deaths, adds to the population. Figure 8.15 in the previous section shows that 58.1 per cent of births in London were by foreign-born mothers, but there is no information on the foreign-born share of deaths in London. Consequently, assuming that this proportion is the same as births (i.e. 58.1 per cent), then the number of births exceeds the number of deaths for foreign-born people. Therefore, on top of the number of migrants in a given year, international migration could also contribute a further 44,600 people to London’s population through natural change. This is shown in Figure 8.23 that replicates the above information but just for the 2001 to 2015 period.

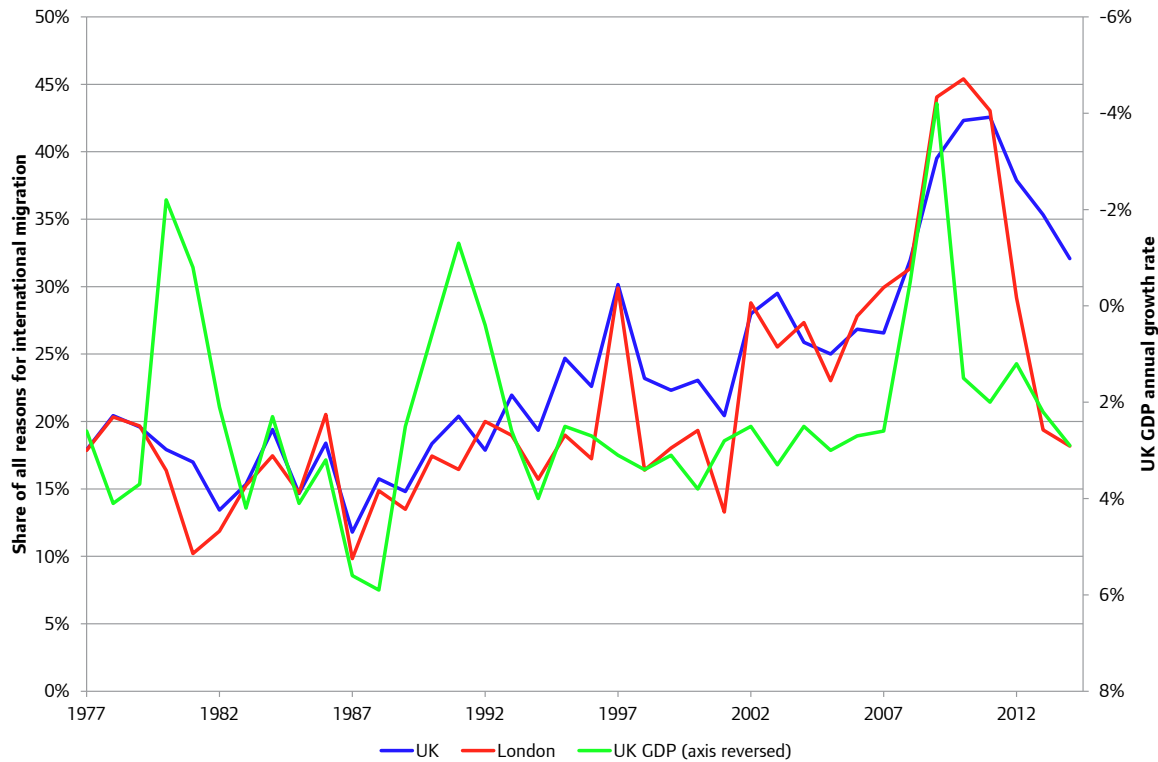
**Figure 8.23: Components of change in London's population, 2001 to 2015**

Note: mid-year estimates.

Source: ONS Mid-year population estimates, ONS Parents' Country of Birth

Some of the reasons for immigrating to the UK are given in Chapter 5. The most common reason for coming to the UK was work-related in all but three of the years between 1995 and 2014; in these three years it was instead formal study. Before 1995, the main reason for migrating to the UK was instead mainly to join family members or other reasons such as asylum.

Chapter 5 also notes that migration for work-related reasons is linked to the relative strength of economic activity in the UK. Subsequently, during the 2008-09 recession, formal study briefly overtook work as the main reason for migrating to the UK. This was similarly the case for London where the proportion of international migrants arriving peaked in 2009 (and the subsequent recovery period). Interestingly, as Figure 8.24 shows, whilst the percentage of migration being for study has fallen back to average levels in London; it still remains elevated for the UK as a whole.

**Figure 8.24: Formal study's share of international migration (inflow) to London and the UK, 1977 to 2014**

Source: ONS National Accounts, ONS International Passenger Survey

### Box 8.2: Irregular migration

Whilst the above refers to migrants who have entered the UK with permission to stay, there is a large number of irregular migrants in the UK and London who may not be counted in these statistics. Irregular migrants include:

- Illegal entrants, which includes people who have evaded formal migration control and people who used false papers.
- Migrants who entered the UK lawfully, but have remained beyond their permitted period, such as failed asylum seekers and over-stayers.
- Children born in the UK to irregular migrant couples.

It was previously estimated that there were 442,000 irregular migrants in London during 2007, but it is notoriously difficult in accurately counting irregular migrants so this figure could range from 281,000 to 630,000<sup>14</sup>. Some of these irregular migrants could be eligible for regularisation – that is, legalising the status of irregular migrants – of which, 294,000 were estimated to be eligible in London based on a five-year residence basis.

Meanwhile, a more recent study looking solely at young people estimated that there were 120,000 irregular migrant children living in the UK in 2012<sup>15</sup>. The majority of these were either born in the UK to irregular migrant parents or arrived at an early age.

The propensity to settle or remain in the UK five years after entering the country also varied by the purpose of visit according to Home Office research<sup>16</sup>. For example, approximately 23.8 per cent of non-EEA migrants with a skilled work visa (with and without a potential path to settlement) left the UK after five years in 2014. This compared with 16.6 per cent for non-EEA migrants with a formal study visa.

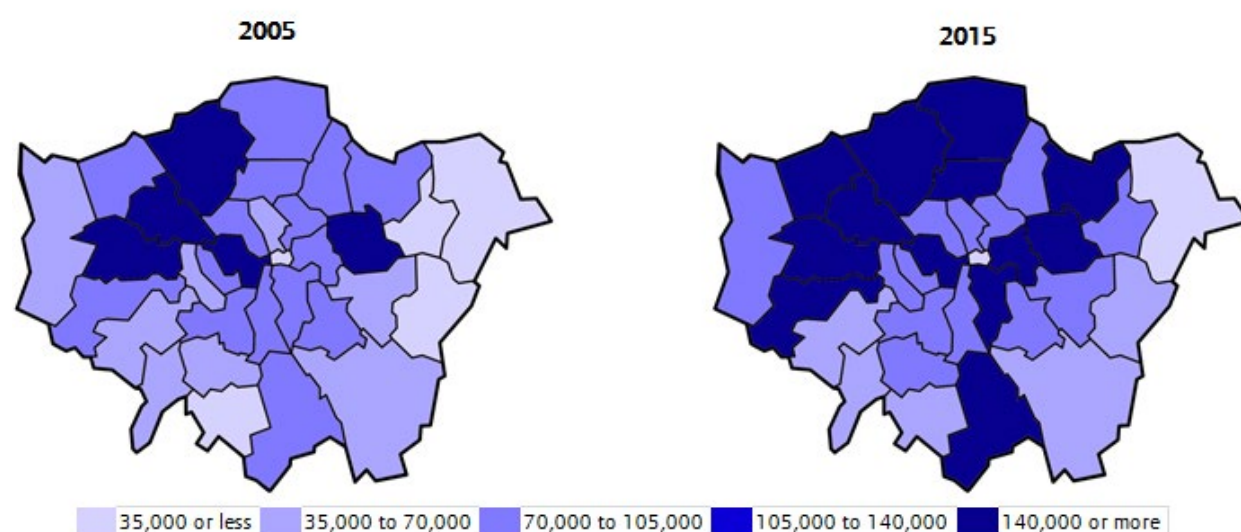
There has been much recent debate about the impact of migration. Appendix 8.1 looks into the issue in more detail, but in general the literature finds that:

- Migrants do not reduce the employment chances of UK natives, but there may be an impact on wages at the lower end of the wage distribution though the size of this effect is disputed. They are also, on average, better educated than the UK born population.
- Businesses report that migrants bring new knowledge, skills and ideas which can increase productivity, though some firms noted some challenges with the integration of migrants and language.
- Migrants are more entrepreneurial and minority ethnic led businesses (so this does not solely include migrants) can help support the local economy.
- Consequently, the tax contribution that foreign born individuals make is (on average) broadly in line with the cost of the services and benefits they receive.
- Migrants are no more likely to use local services, like GPs and social housing, than the UK-born population.

### 8.4.1 Country of birth

London's high international inflow means it has become something of a hub for foreign-born communities. Approximately 3.1m people living in London were born abroad (37 per cent of the total population)<sup>17</sup>. The distribution of the foreign born population across London in 2015 and how this has changed since 2005 is shown in Map 8.4.

**Map 8.4: Distribution of foreign born residents across London in 2005 and 2015**



Note: January to December period.

Source: ONS Annual Population Survey

Just under half (49 per cent) of London's foreign born population had arrived in the UK in the previous ten years of the 2011 Census, while only one-in-five (21 per cent) had been resident in the UK for more than 30 years. This means that one-in-six Londoners had arrived in the UK since 2001 overall. This profile varies considerably between different countries of birth as shown in Table 8.2. For example, more than half of those born in Ireland or countries within the Caribbean arrived in the UK before 1981, whereas 87 per cent of those from Poland had arrived since 2001.

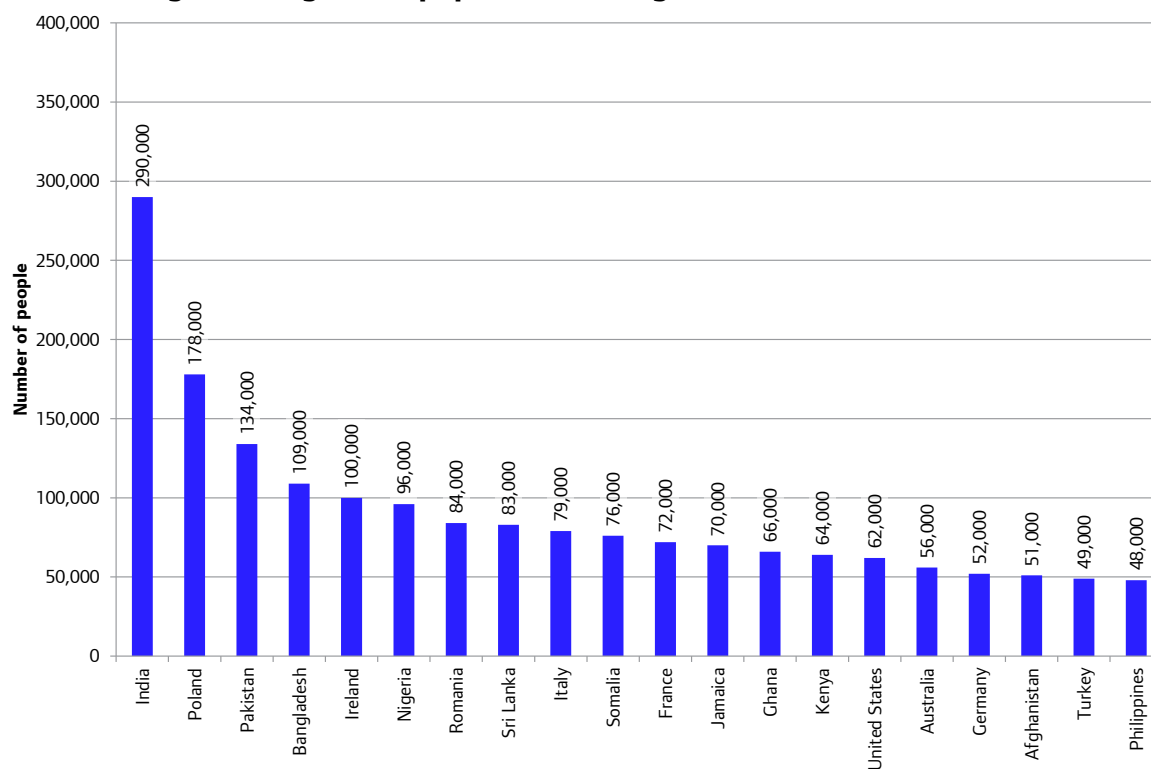
**Table 8.2: London residents with selected countries or regions of birth in 2011, percentages arrived in UK by year**

Country of birth	Number born outside of the UK	Year of arrival in the UK		
		Before 1981	1981-2000	2001-2011
Ireland	130,000	55%	24%	21%
France	67,000	7%	27%	65%
Germany	55,000	23%	25%	54%
Poland	158,000	4%	10%	87%
Romania	45,000	0%	1%	99%
India	262,000	32%	20%	48%
Pakistan	112,000	23%	29%	48%
Australasia	83,000	9%	21%	70%
The Caribbean	144,000	59%	23%	17%
<b>All born outside the UK</b>	<b>2,998,000</b>	<b>21%</b>	<b>30%</b>	<b>49%</b>

Note: percentages may not sum to 100% due to rounding.

Source: GLA Intelligence's Londoner's born overseas using ONS Census 2011 data

Using more timely data (the ONS Annual Population Survey) than the 2011 Census which means these figures do not necessarily match those shown in Table 8.2, the top non-UK country of birth of Londoners in 2014 was India with 290,000 (3.4 per cent of the total London population) residents as shown in Figure 8.25. Poland (2.1 per cent), Pakistan (1.6 per cent), Bangladesh (1.3 per cent) and Ireland (1.2 per cent) also had over 100,000 residents each living in London during 2014.

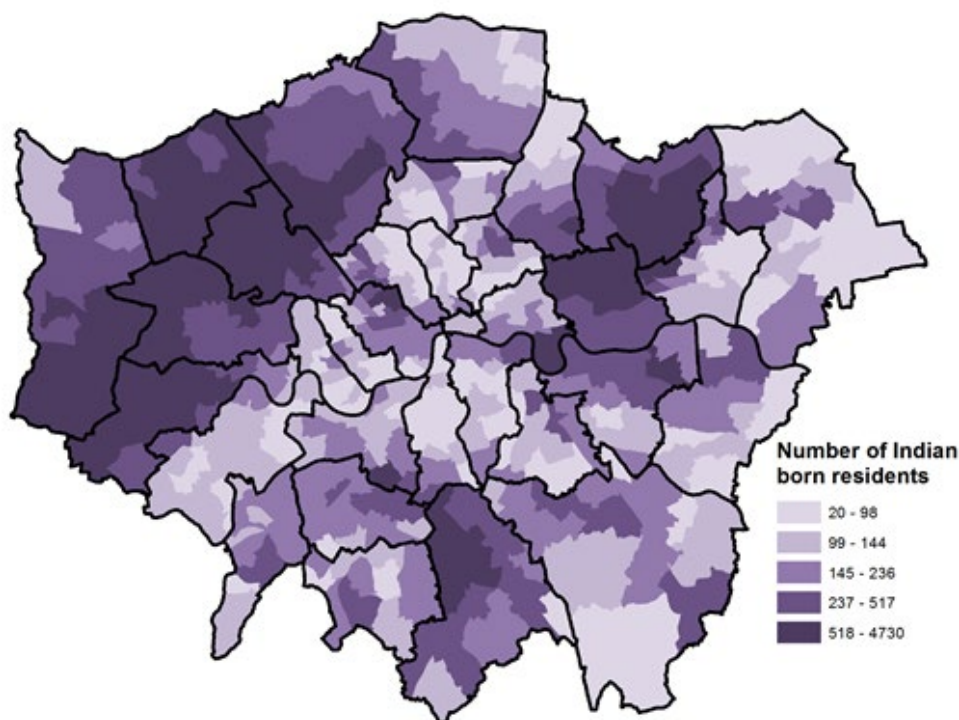
**Figure 8.25: Largest foreign born populations living in London in 2014**

Source: ONS Annual Population Survey

Demographic and employment characteristics vary between the different migrant communities as illustrated by the following case studies for those born in India, Poland and EU member countries in 2001. To provide the depth of information needed here, this section uses Census data and thus refers to 2011.

#### 8.4.1.1 Born in India

The areas with the highest number of residents born in India were in west London and north-east London in 2011 (Map 8.5).

**Map 8.5: Distribution of Indian born residents across London wards in 2011**

Source: ONS Census 2011

The Indian born population is also older than the UK born population, with 18.4 per cent aged 65 and over versus 11.1 per cent for the UK born residents.

Following the trend for all international migrants, half (48 per cent) of the Indian born population arrived in the UK after 2001 according to the Census 2011 (see Table 8.2). A further 20 per cent arrived between 1981 and 2001 and 32 per cent before 1981.

The percentage of people born in India and residing in England and Wales (not just London) who reported that they could not speak English at all or not well was 13.7 per cent according to the Census 2011.

In 2011, 79 per cent of male and 59.1 per cent of female India-born London residents aged 16-64 years were in employment. This compared with 74 per cent and 67.9 per cent respectively for those UK-born.

The top occupations for men were Science, Research, Engineering & Technology Professionals (11 per cent) and Elementary Administration & Service (11 per cent).

The top occupations for women born in India were Administrative (13 per cent), Elementary Administration & Service (11 per cent) and Sales (11 per cent) occupations.

Over half of people born in India (16 years and over) and living in England and Wales were working in the Public Administration, Education & Health (27.3 per cent) and Distribution, Hotels & Restaurants (24.9 per cent) sectors.

There is no country breakdown for the qualifications of foreign-born people. Acknowledging that, 36.5 per cent of residents born in Southern Asia aged 16-64 years and living in London had level 4 qualifications (equivalent to higher education) or higher as their highest qualification. However, at the

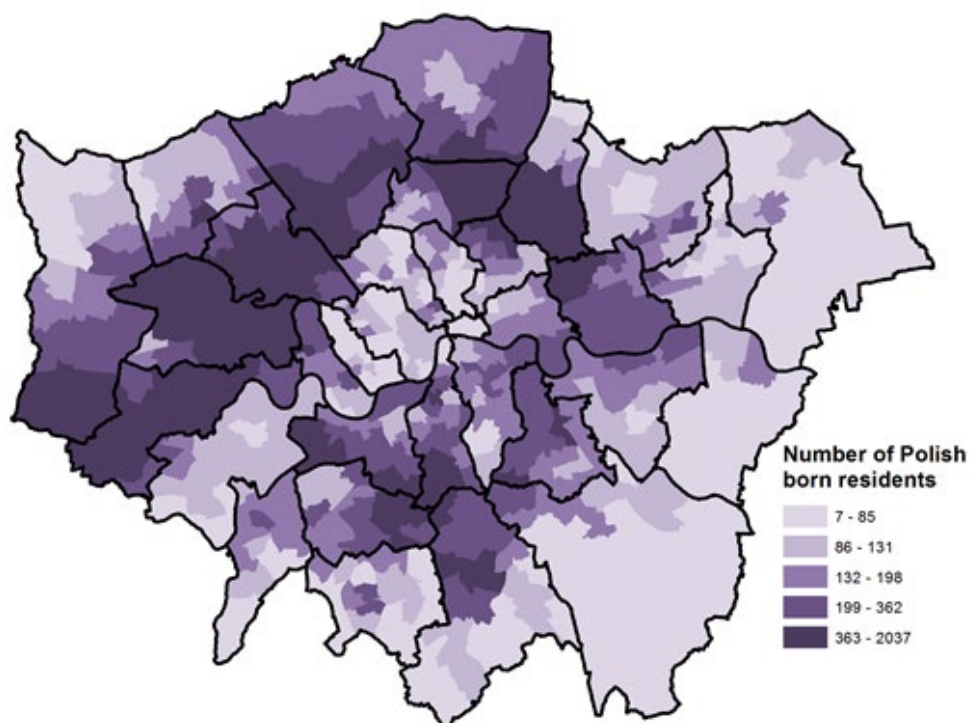


other end, 17.1 per cent had no qualifications and 10.1 per cent had a level 1 qualification such as GCSE grades D or below.

#### 8.4.1.2 Born in Poland

The areas with the highest number of residents born in Poland form a ring around the central London boroughs as shown in Map 8.6.

**Map 8.6: Distribution of Polish born residents across London wards in 2011**



Source: ONS Census 2011

The majority (69.2 per cent) of residents born in Poland are aged between 20 and 39 years old and contrasted with 29.5 per cent of UK born residents. Meanwhile, just 3.5 per cent were aged 65 or over in 2011.

The majority of people born in Poland (87 per cent) arrived in the UK between 2001 and 2011, whereas 10 per cent arrived between 1981 and 2001 as shown in Table 8.2.

One-in-four (24.6 per cent) of Polish people in England and Wales (not just London) self-reported that they could not speak English or could not speak English well.

The employment rate for Polish men aged 16-64 years was 87.4 per cent in 2011, which was above that for men born in the UK (74 per cent). The employment rate was lower for women at 77 per cent, but still above that for those born in the UK (67.9 per cent).

The top occupations for men were Skilled Construction & Building Trades (32 per cent), Elementary Administration (11 per cent), and Transport & Mobile Machine Drivers & Operatives (8 per cent) roles.

The top occupations for women born in Poland and residing in London were Elementary Administration & Service (30 per cent), Administrative (8 per cent) and Caring Personal Service (8 per cent) occupations.



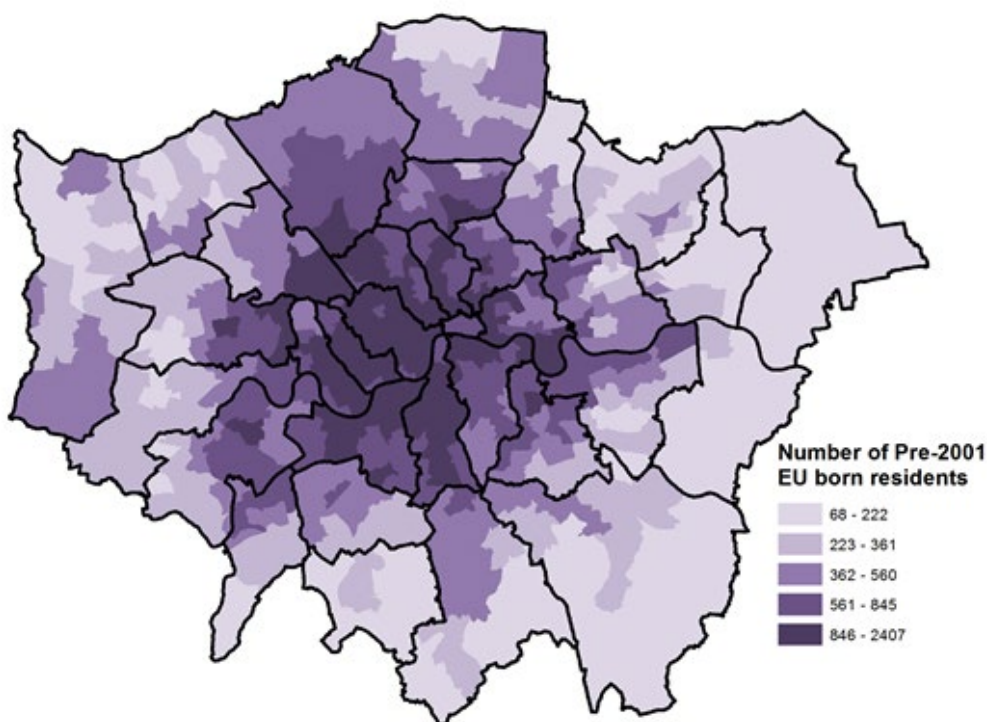
Approximately 26.6 per cent of people (16 years and over) born in Poland and living in England and Wales worked in the Distribution, Hotels & Restaurants sector.

Although there is no country breakdown, the percentage of London residents born in EU Accession countries between April 2001 and March 2011 (which includes Poland) with level 4 qualifications was 29.5 per cent in 2011.

#### 8.4.1.3 EU member countries in 2001

This group consisted of people born in any country that was a member of the EU in 2001<sup>18</sup>. The majority of those from these countries lived in inner London as shown in Map 8.7.

**Map 8.7: Distribution of pre-2001 EU born residents across London wards in 2011**



Source: ONS Census 2011

The pre-2001 EU born population living in London was predominantly young working people, with 51.3 per cent aged 20 to 39 years. That compared with 29.5 per cent for those born in the UK.

Over half (58 per cent) of people born in pre-2001 EU countries arrived in the UK between 2001 and 2011.

Approximately half (49 per cent) of people born in pre-2001 EU countries and living in England and Wales had English as their main language. In fact, less than 5 per cent self-reported that they could not speak English at all or not well.

In 2011, 79 per cent of men born in pre-2001 EU countries and aged 16-64 years were in employment. The equivalent figure for women was 70.1 per cent.

The top occupations for men were Business, Media & Public Service Professionals (12 per cent) and Corporate Managers & Directors (12 per cent).

The top occupations for women were Elementary Administration (14 per cent) and Business, Media & Public Service Professionals (10 per cent).

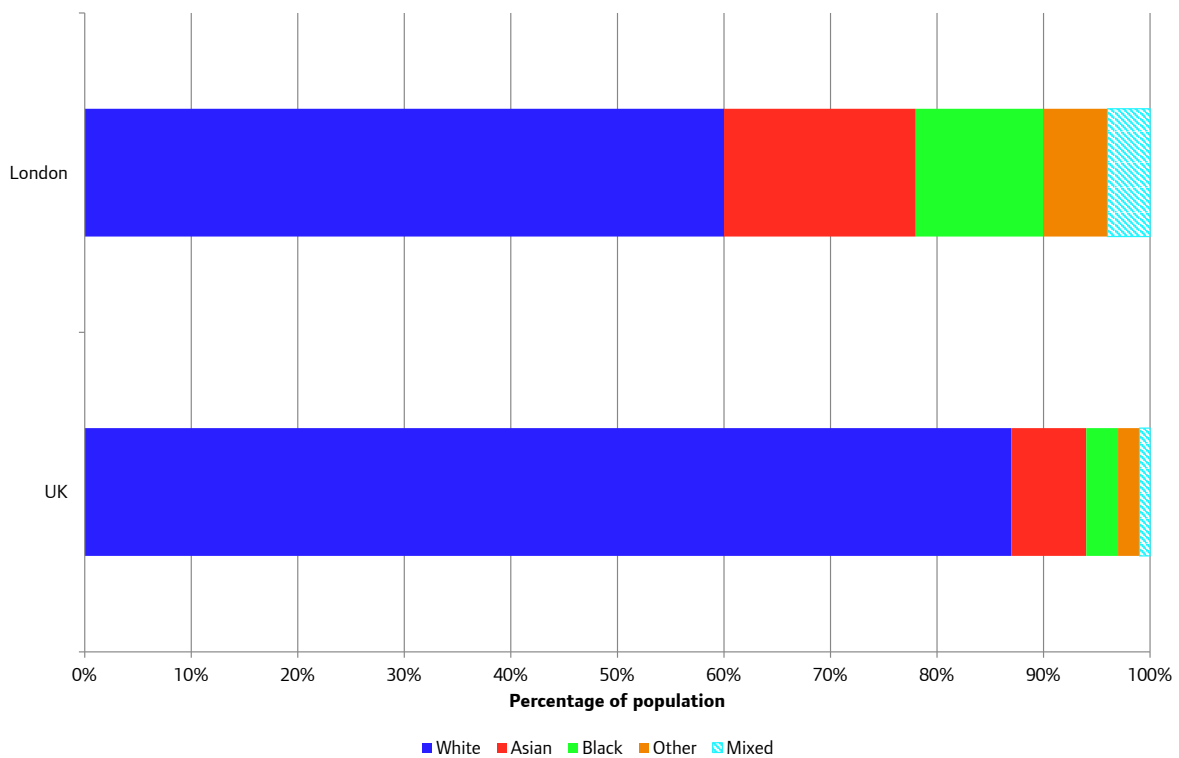
There were 26 per cent of people (16 years and over) living in England and Wales born in pre-2001 EU countries working in the Public Administration, Education & Health sectors. A further 24.2 per cent were in the Financial, Real Estate, Professional & Administrative Activities industries.

This is a highly skilled group with over half (50.8 per cent) having level 4 qualifications such as ordinary and higher degrees. By way of comparison, the London average for all countries of birth was 40.4 per cent.

### 8.4.2 Ethnicity

All of the above has made London a city renowned for its diversity. Some 40 per cent of its residents perceived themselves as Black, Asian and Minority Ethnic (BAME) as shown in Figure 8.26. By way of comparison, the figure for the UK as a whole was 13 per cent.

**Figure 8.26: Residents by ethnic group for London and the UK in 2014**



Source: ONS Annual Population Survey

Borough breakdowns are possible (Table 8.3), but only using Census data meaning it is not directly comparable with the above.

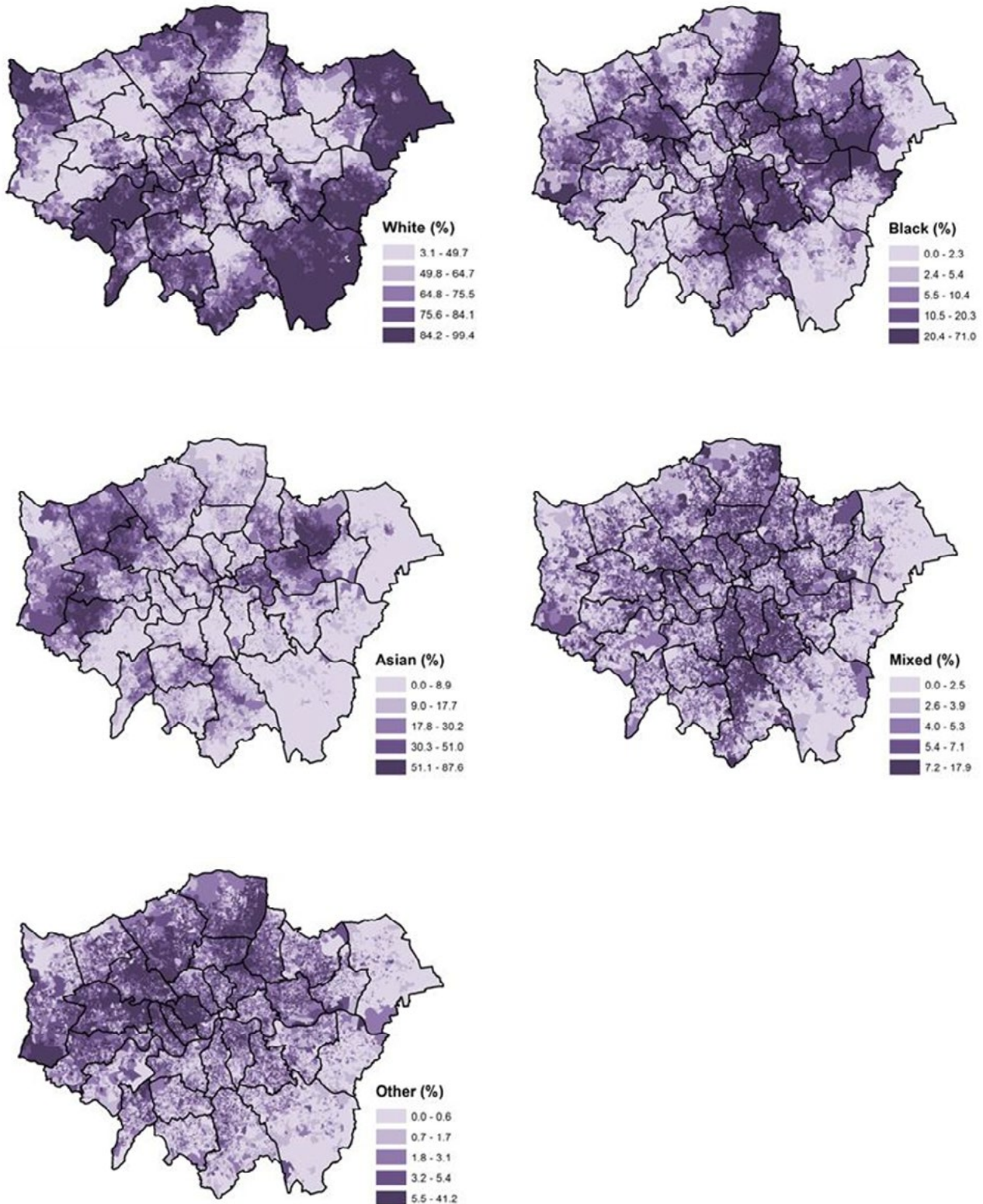
**Table 8.3: Residents by ethnic group for London boroughs in 2011**

Borough	White British	White Other	Mixed	Asian	Black	Other
Barking and Dagenham	49.5%	8.8%	4.2%	15.9%	20.0%	1.6%
Barnet	45.5%	18.6%	4.8%	18.5%	7.7%	4.9%
Bexley	77.3%	4.6%	2.3%	6.6%	8.5%	0.8%
Brent	18.0%	18.3%	5.1%	34.1%	18.8%	5.8%
Bromley	77.4%	6.9%	3.5%	5.2%	6.0%	0.9%
Camden	44.0%	22.3%	5.6%	16.1%	8.2%	3.8%
City of London	57.5%	21.1%	3.9%	12.7%	2.6%	2.1%
Croydon	47.3%	7.8%	6.6%	16.4%	20.2%	1.8%
Ealing	30.4%	18.6%	4.5%	29.7%	10.9%	6.0%
Enfield	40.5%	20.5%	5.5%	11.2%	17.2%	5.1%
Greenwich	52.3%	10.2%	4.8%	11.7%	19.1%	1.9%
Hackney	36.2%	18.5%	6.4%	10.5%	23.1%	5.3%
Hammersmith and Fulham	44.9%	23.1%	5.5%	9.1%	11.8%	5.5%
Haringey	34.7%	25.9%	6.5%	9.5%	18.8%	4.7%
Harrow	30.9%	11.4%	4.0%	42.6%	8.2%	2.9%
Havering	83.3%	4.4%	2.1%	4.9%	4.8%	0.6%
Hillingdon	52.2%	8.4%	3.8%	25.3%	7.3%	3.0%
Hounslow	37.9%	13.5%	4.1%	34.4%	6.6%	3.6%
Islington	47.7%	20.5%	6.5%	9.2%	12.8%	3.4%
Kensington and Chelsea	39.3%	31.4%	5.7%	10.0%	6.5%	7.2%
Kingston upon Thames	63.1%	11.4%	3.9%	16.3%	2.5%	2.7%
Lambeth	39.0%	18.1%	7.6%	6.9%	25.9%	2.4%
Lewisham	41.5%	12.0%	7.4%	9.3%	27.2%	2.6%
Merton	48.4%	16.5%	4.7%	18.1%	10.4%	1.9%
Newham	16.7%	12.2%	4.5%	43.5%	19.6%	3.5%
Redbridge	34.5%	8.0%	4.1%	41.8%	8.9%	2.7%
Richmond upon Thames	71.4%	14.5%	3.6%	7.3%	1.5%	1.6%
Southwark	39.7%	14.5%	6.2%	9.4%	26.9%	3.3%
Sutton	70.9%	7.7%	3.8%	11.6%	4.8%	1.3%
Tower Hamlets	31.2%	14.0%	4.1%	41.1%	7.3%	2.3%
Waltham Forest	36.0%	16.2%	5.3%	21.1%	17.3%	4.1%
Wandsworth	53.3%	18.1%	5.0%	10.9%	10.7%	2.1%
Westminster	35.2%	26.4%	5.2%	14.5%	7.5%	11.1%
Inner London	42.2%	18.3%	5.9%	13.2%	16.4%	4.0%
Outer London	46.4%	13.0%	4.5%	21.4%	11.6%	3.2%
<b>London</b>	<b>44.9%</b>	<b>14.9%</b>	<b>5.0%</b>	<b>18.5%</b>	<b>13.3%</b>	<b>3.4%</b>

Source: ONS Census 2011

There are clear spatial trends when looking at London's ethnic groups and these have been changing over time. As shown in Map 8.8, London's White population was most highly concentrated in outer London; its Black population in east London; and its Asian population is west and north-east London.

**Map 8.8: Distribution of ethnic groups across London in 2011**

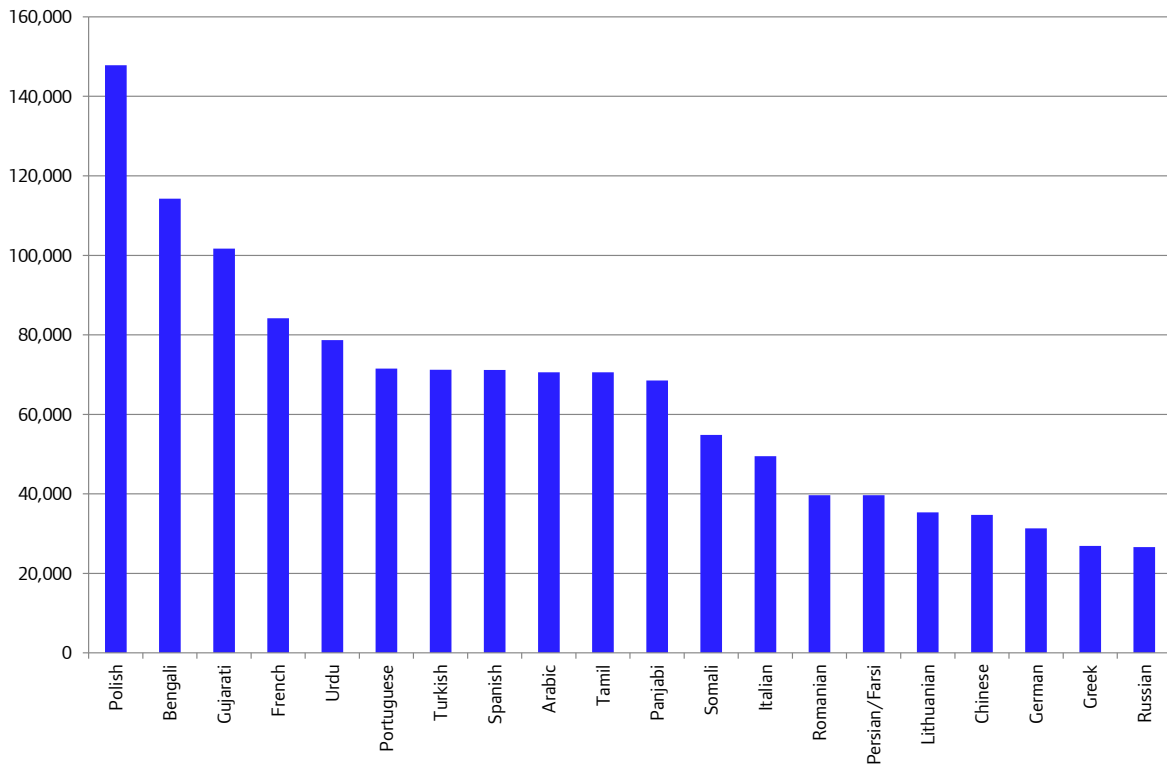


Source: ONS Census 2011

### 8.4.3 Language

In London, 1.7m (or 22 per cent) residents listed a language other than English as their main language. The most common non-English main language was Polish with 148,000 speakers while Bengali, Gujarati, French and Urdu make up the other top five languages (Figure 8.27).

**Figure 8.27: Most spoken non-English main languages in London in 2011**



Source: ONS Census 2011

The 2011 Census counted that one-in-ten (some 300,000) of London’s foreign born population self-reported that they cannot speak English well or at all. An additional 20,000 UK born Londoners also faced this problem meaning 320,000 or 4 per cent of London’s population cannot speak English well or at all.

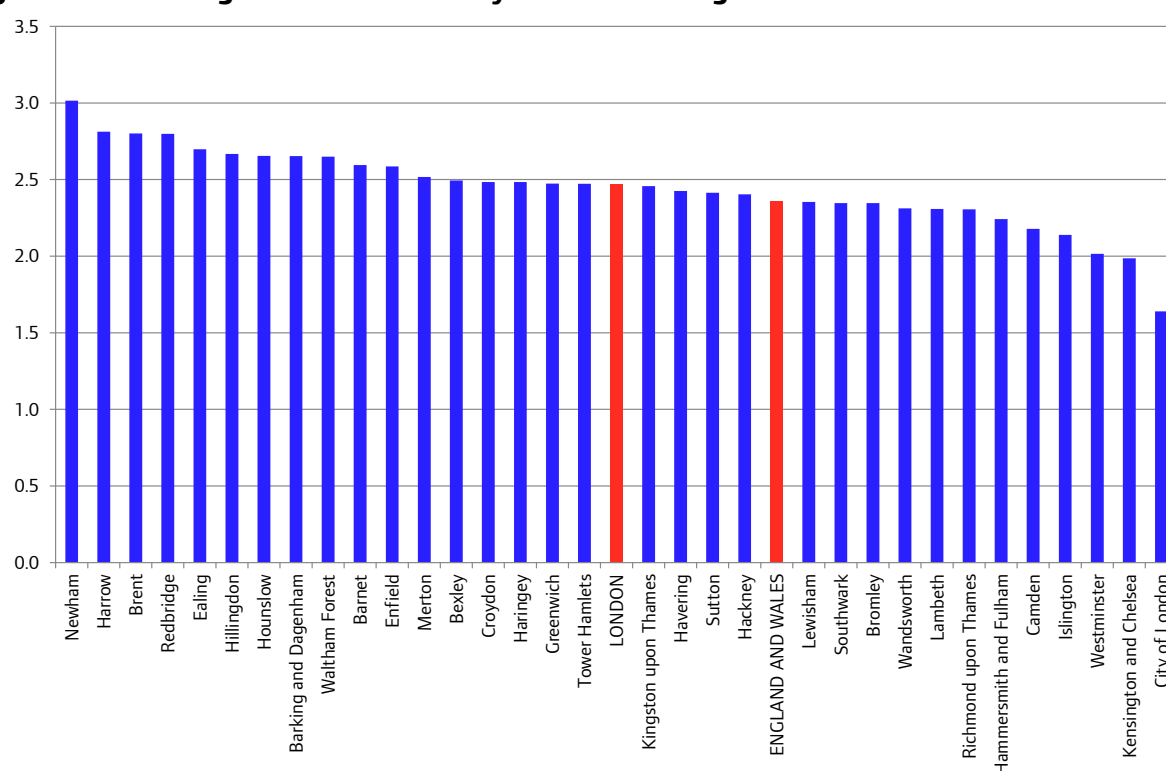
## 8.5 Households

The vast majority of Londoners lived in private households – 8.1m of the total of 8.2m residents counted at the time of the 2011 Census lived in 3.3m households, equivalent to 99 per cent of the population. The remaining 1 per cent of Londoners lived in communal establishments<sup>19</sup>.

The average household size for London was 2.47 in 2011, up from around 2.4 in 2001. That was the largest of any region in England and Wales, with the national average at 2.36. However, London is a city of contrasts and includes the local authorities with both the lowest and highest average household sizes in the UK.

The City of London and Kensington & Chelsea were the only two authorities in England and Wales where there were fewer than two residents per household on average (1.64 and 1.99 respectively), while Westminster sat just above at 2.02. At the other end of the scale, Newham was the only local authority where the average was greater than three residents per household at 3.01 (Figure 8.28).

**Figure 8.28: Average household size by London borough in 2011**

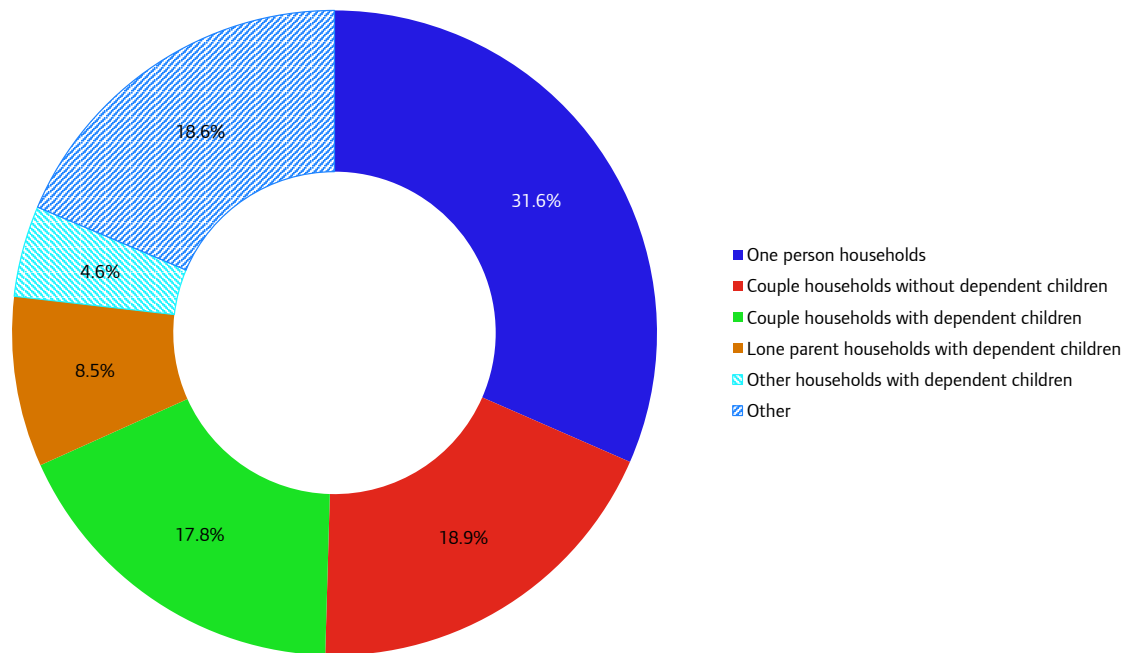


Source: ONS Census 2011

### 8.5.1 Household composition

Approximately one-in-three households in London (31.6 per cent) were made up of just one person while 36.7 per cent were couple households (Figure 8.29). The proportion of one person households was similar to the national average (30.2 per cent). However, by age, only 30 per cent of those living alone in London were aged 65 or over compared to the national figure of 40 per cent.

**Figure 8.29: Composition of London households in 2011**



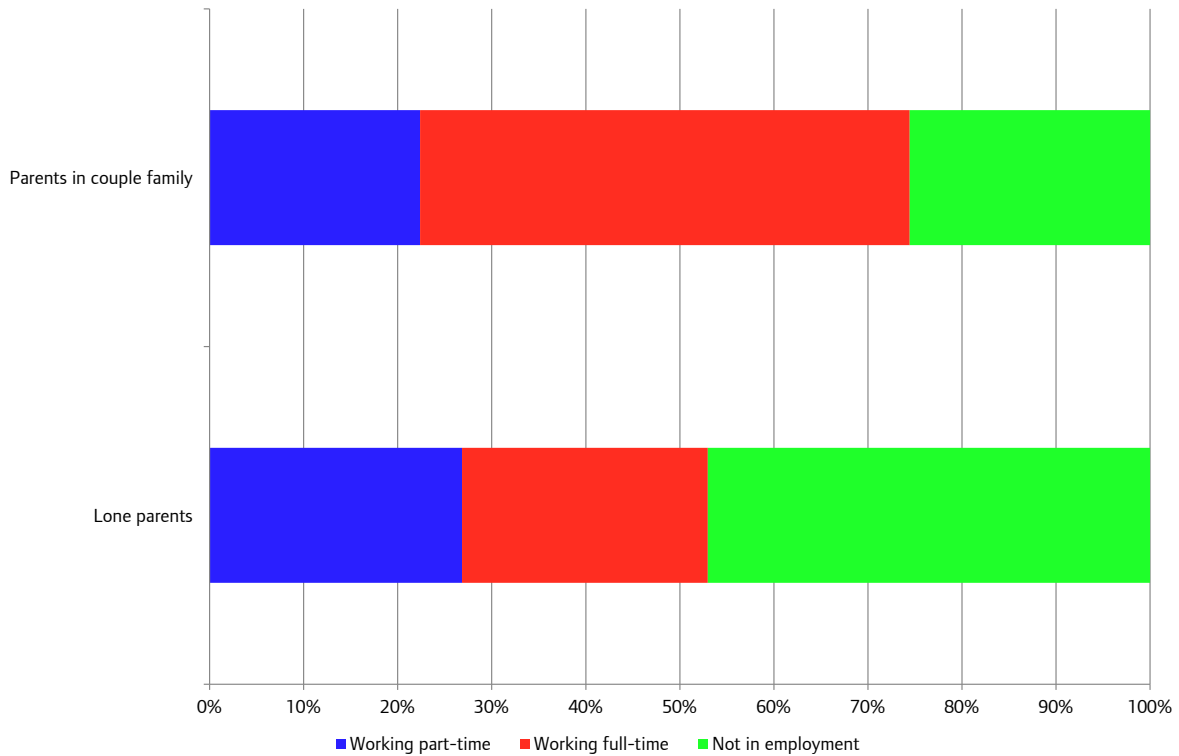
Source: ONS Census 2011

Some 30.9 per cent of households contained at least one dependent child. Moreover, 74.4 per cent of parents in couple families were working compared to 53 per cent of lone parents (Figure 8.30). The national figures were 80 per cent for couple families and 59 per cent for lone parents.

Not only were lone parents less likely to be in employment than parents in a couple, but they were less likely to work full-time. For example, 49.3 per cent of lone parents in employment worked full-time compared to 69.9 per cent of parents in couple families. More discussion on the economic activity of parents is given in Chapter 9.



**Figure 8.30: Economic activity of parents by family type for London in 2011**

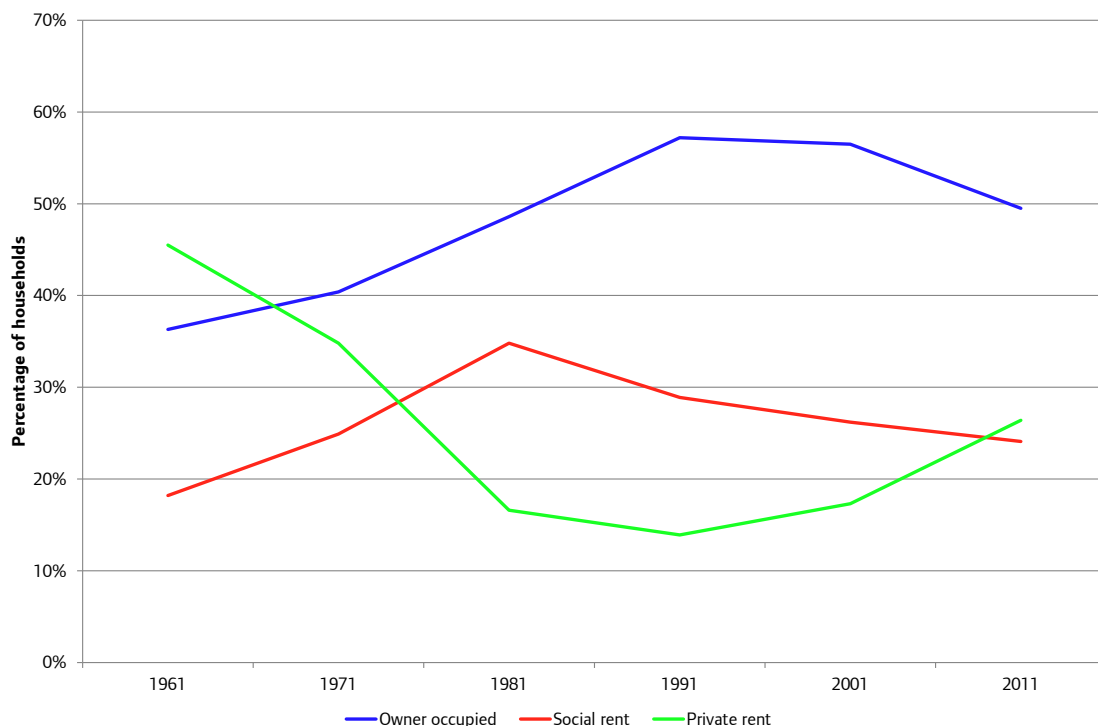


Source: ONS Census 2011

### 8.5.2 Tenure

Figure 8.31 shows that between 1961 and 1981, both owner occupation and social renting were in the ascendancy. Because of this, by 1981, private renting was the least common form of housing tenure with just 15 per cent of households in London in private rent. However, since then, the social rented sector has been shrinking while the private rented sector has had a recent resurgence and, in 2011, overtook social rented as the second most common tenure in London.

**Figure 8.31: Housing tenure in London, 1961 to 2011**

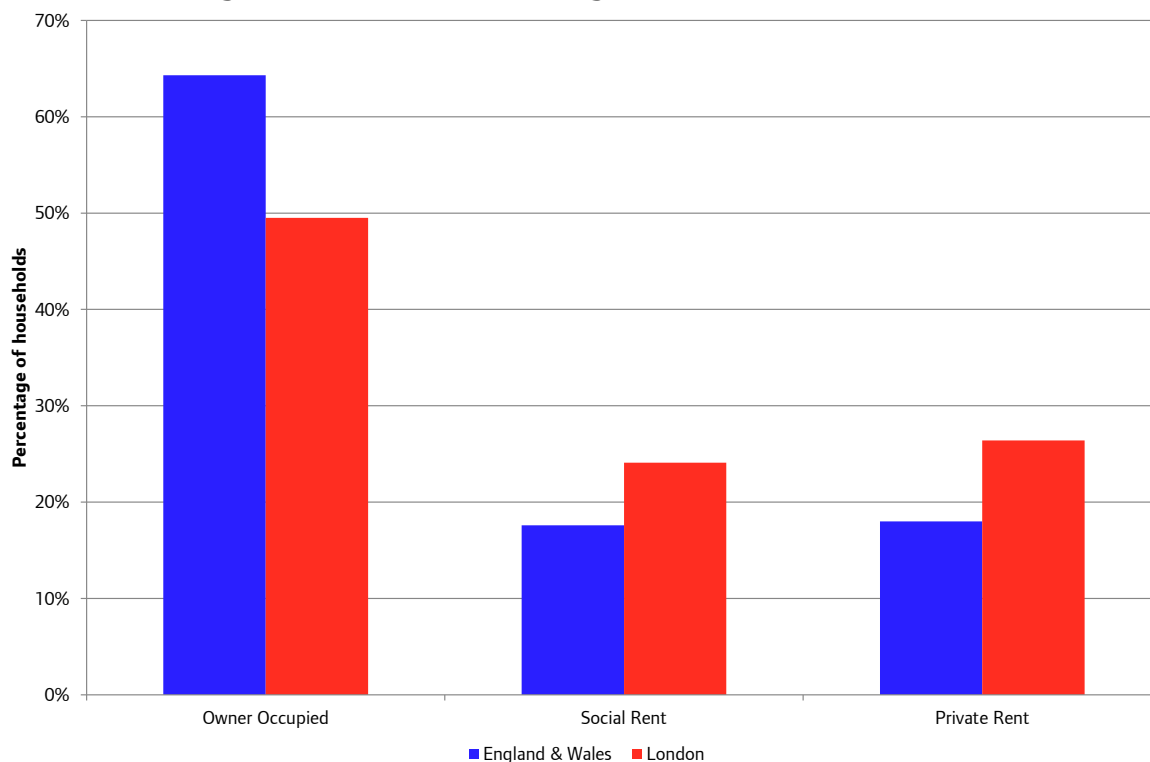


Source: ONS Census 1961 to 2011



Comparing London’s most recent Census figures to the national average (Figure 8.32 and Table 8.4); owner occupation was much less common in the capital with a higher proportion renting their accommodation instead.

**Figure 8.32: Housing tenure in London and England & Wales, 2011**



Source: ONS Census 2011

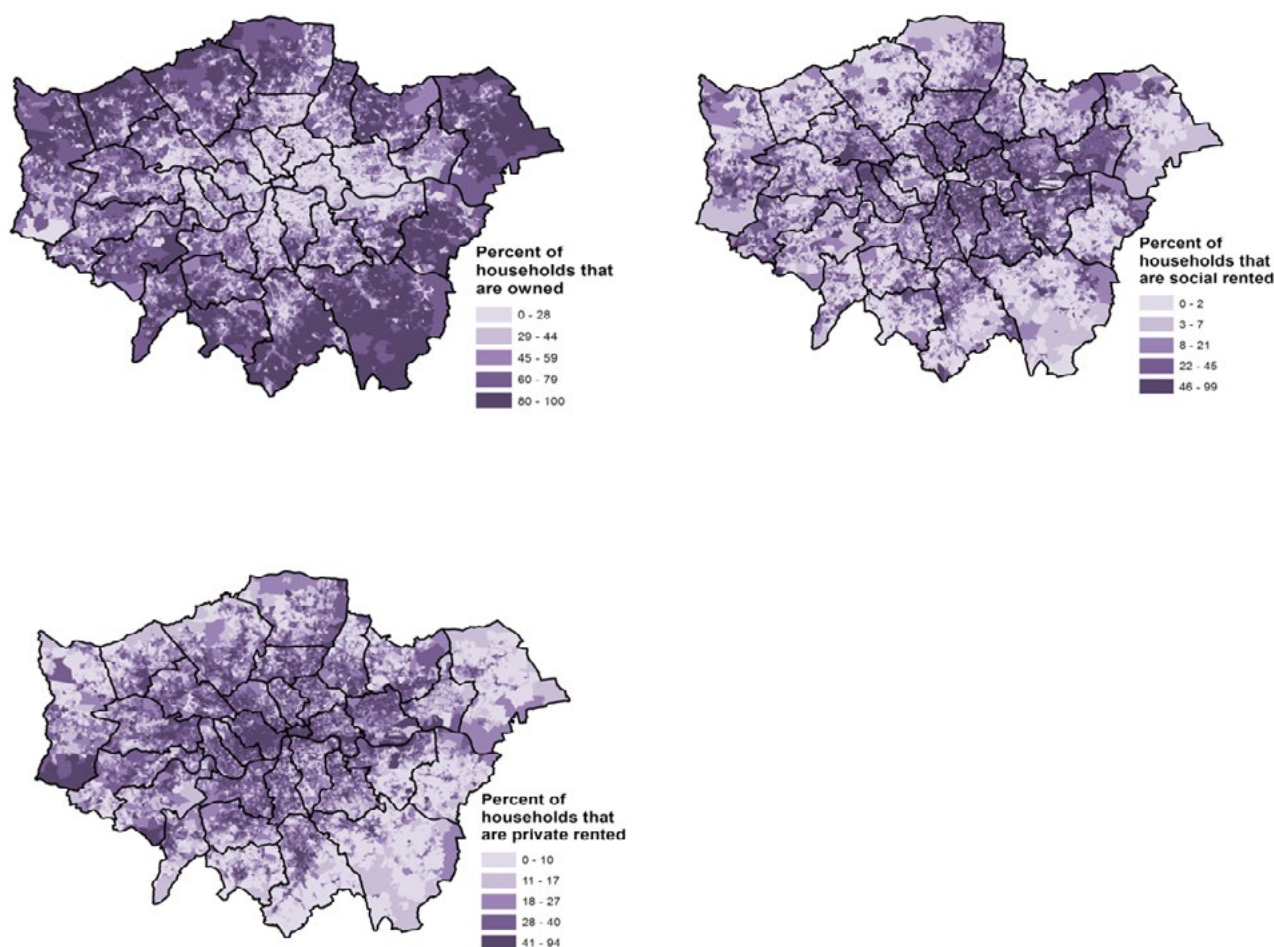
**Table 8.4: Housing tenure in London and England and Wales in 2011**

Area	Total Households	Owner Occupied		Social Rent		Private Rent	
London	3,266,173	1,618,315	50%	785,993	24%	861,865	26%
England and Wales	23,366,044	15,031,914	64%	4,118,461	18%	4,215,669	18%

Source: ONS 2011 Census

Owner-occupied households were more common in outer London, whilst both private and social rented households were more prevalent in inner London as shown in Map 8.9.

Havering was the borough with the highest proportion of owner-occupied households (74 per cent); Southwark and Hackney were the boroughs with the highest proportion of social rented households (both 44 per cent); and Westminster had the highest proportion of private rented households.

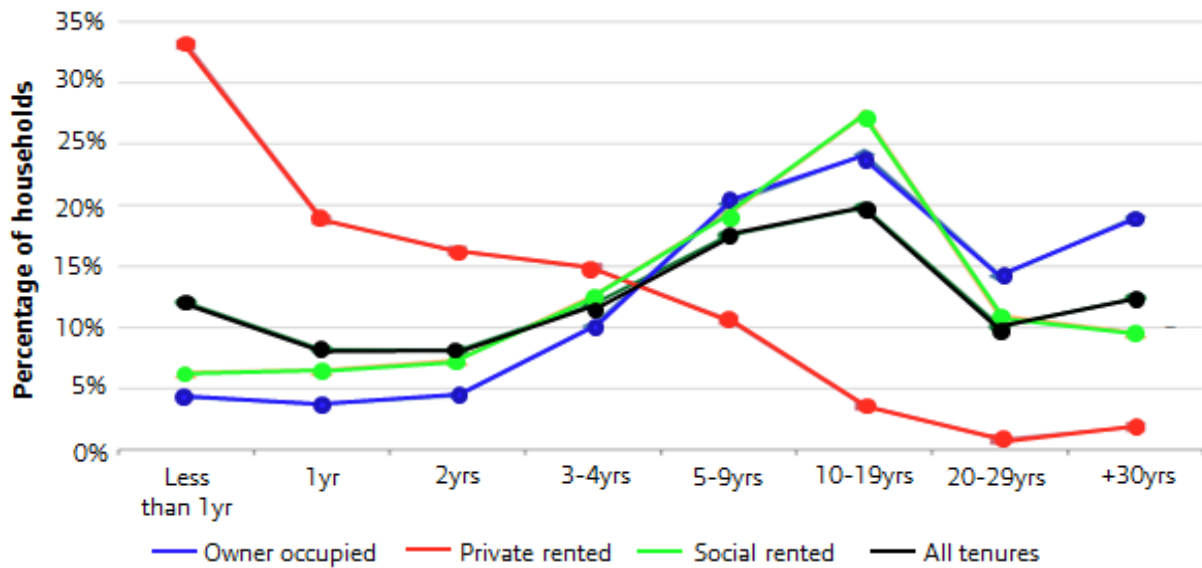
**Map 8.9: Variations in tenure of households across London in 2011**

Source: ONS Census 2011

Approximately 12 per cent of households in London moved house within the last year (including those moving to London from elsewhere) according to the English Housing Surveys covering the 2010-11 to 2012-13 periods. A further 18 per cent had lived in their current home for 5-9 years, 20 per cent for 10-19 years and 22 per cent for more than 20 years. The most common reasons given by households in London for moving house were to move to a better area, to a larger home or for job related reasons.

Mobility was far higher in the private rented sector where 33 per cent of households had moved in the past year, compared with 6 per cent of social renting households and 3 per cent of owner occupiers (Figure 8.36). Although London's mobility trends by tenure were similar to that for the rest of England, London had a higher overall mobility rate due to its larger private rented sector.

**Figure 8.33: Length of time in current home by tenure for London in 2012-13, three-year average**

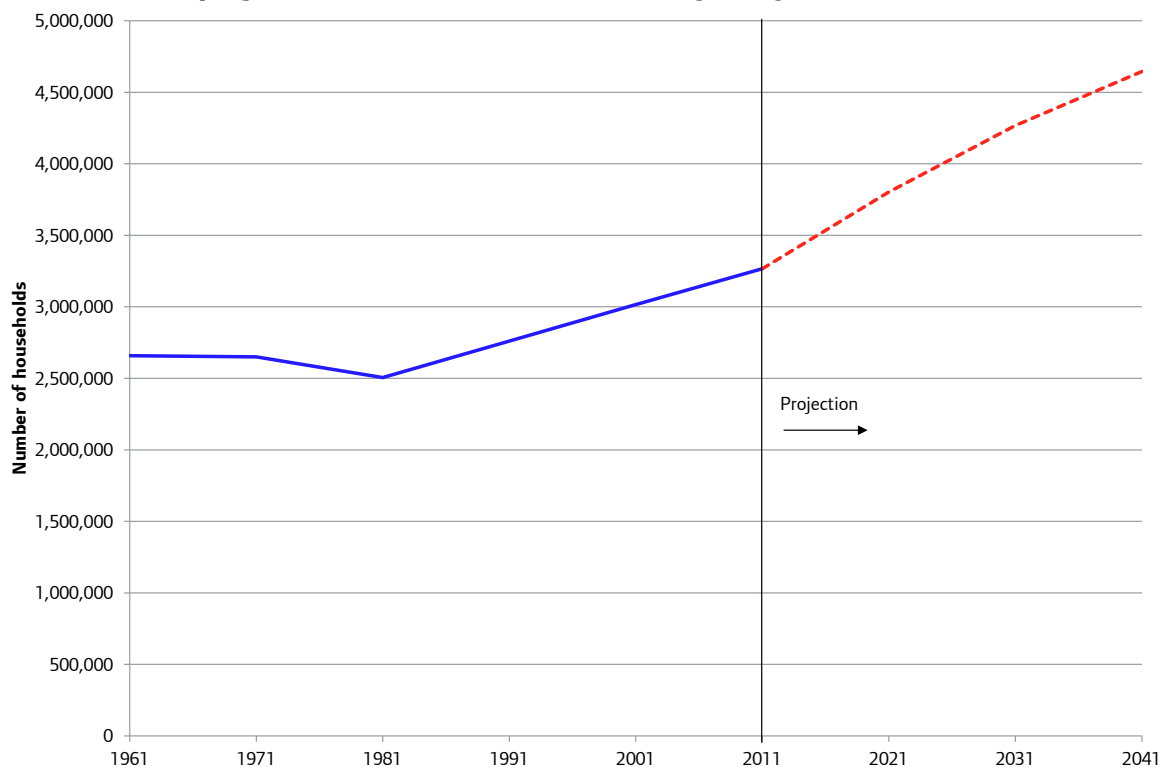


Source: English Housing Survey. Taken from GLA (2015). *Housing in London 2015*

### 8.5.3 Household projections

London’s number of total households is projected to grow by 32.6 per cent between 2015 and 2041. This would mean 1.1m more households in the capital bringing the total to 4.6m by 2041 (Figure 8.34).

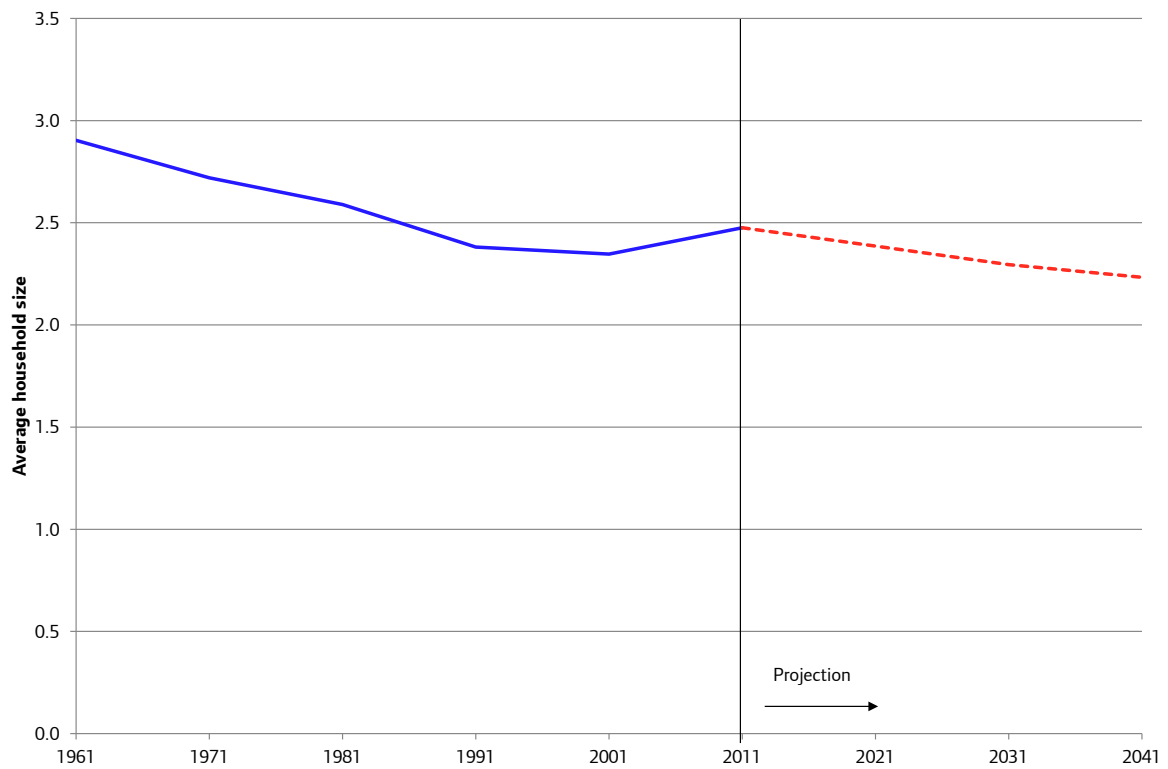
**Figure 8.34: Total projected households, London, every ten years between 1961 and 2041**



Source: ONS Census (historic data), GLA 2015 round trend-based household projections (long-term migration scenario)

The projected increase in household numbers in London is partly due to decreasing average household size. By 2041, it is projected that the average household in London will consist of 2.23 people falling from the 2015 projection of 2.44 (Figure 8.35).

**Figure 8.35: Projected average household size, London, 1961 to 2041**



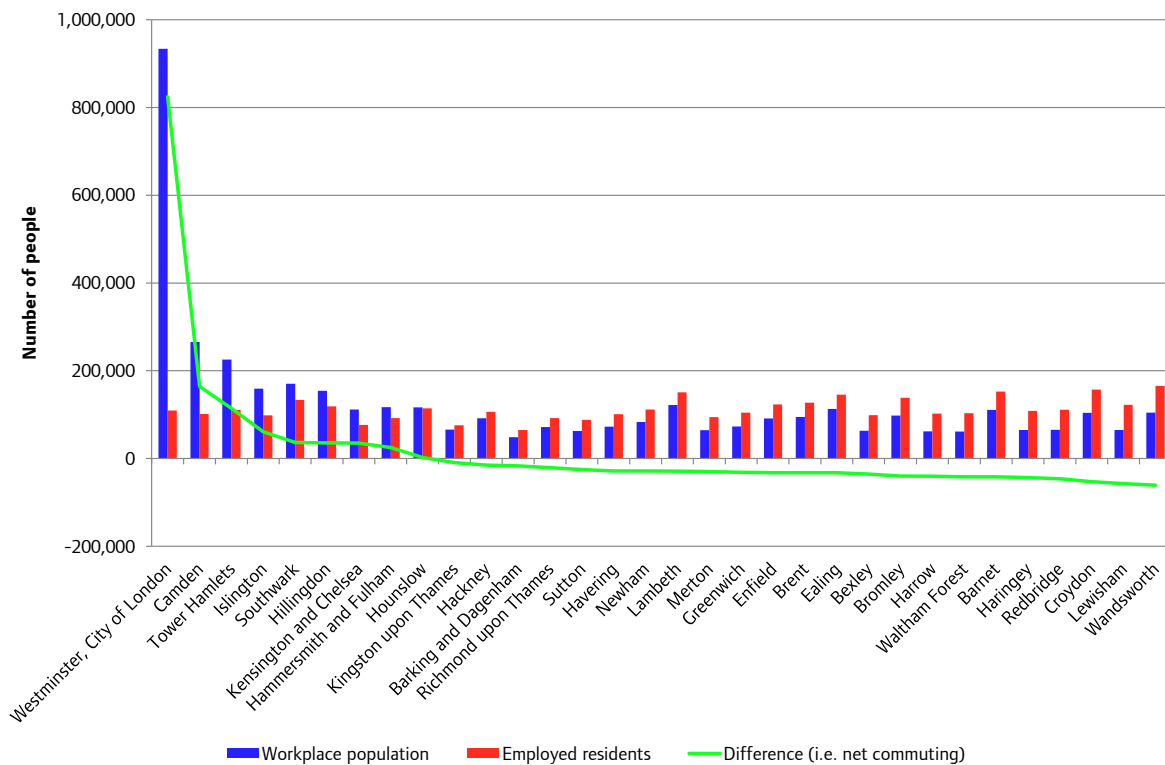
Source: ONS Census (historic data), GLA 2014 round trend-based household projections (long-term migration scenario)

### 8.6 Commuters and tourists

Whilst 8.7m people lived in London in 2015, London’s workday population grows as a result of commuters flooding in for work and international and domestic tourists coming to visit.

Data from the Census 2011 suggested that 795,100 people aged 16 years and over work – but do not live – in London. Offsetting this are people living in London but working in other parts of the UK, which was estimated at 273,700 in 2011. This means that London sees an overall net inflow of 521,400 commuters. Westminster & City of London (824,500 people) and Camden (164,100 people) see the largest net inflow of commuters. In contrast, Wandsworth sees the biggest net outflow of commuters of around 60,700 people, though this could be to other London boroughs. This can be seen in Figure 8.36 which shows the workplace population and the number of usual residents in employment by borough.

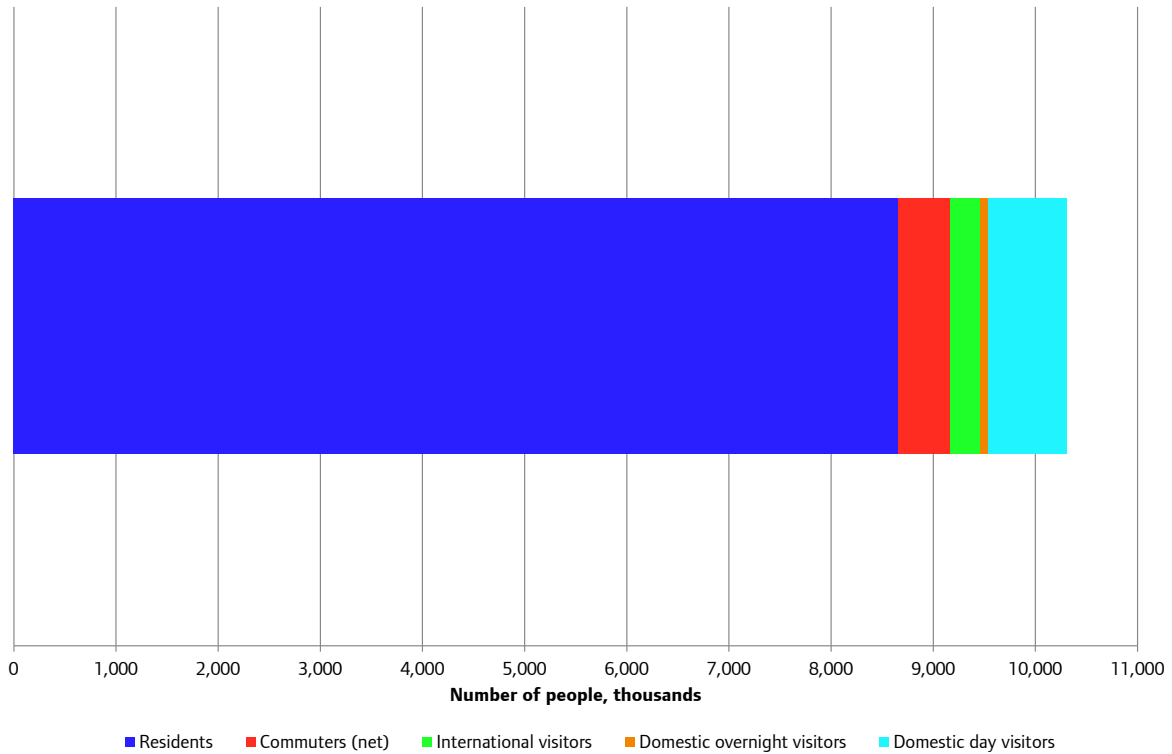
**Figure 8.36: Net commuting by London borough in 2011, 16 years and above**



Source: ONS Census 2011

Meanwhile, London sees 1.1m tourists<sup>20</sup> – whether they are international, domestic overnight and domestic day visitors – on any given day. Therefore, this all means that the number of people in London could rise from 8.7m residents to 10.3m in total (Figure 8.37).

**Figure 8.37: Estimates of London’s workday population in 2015**

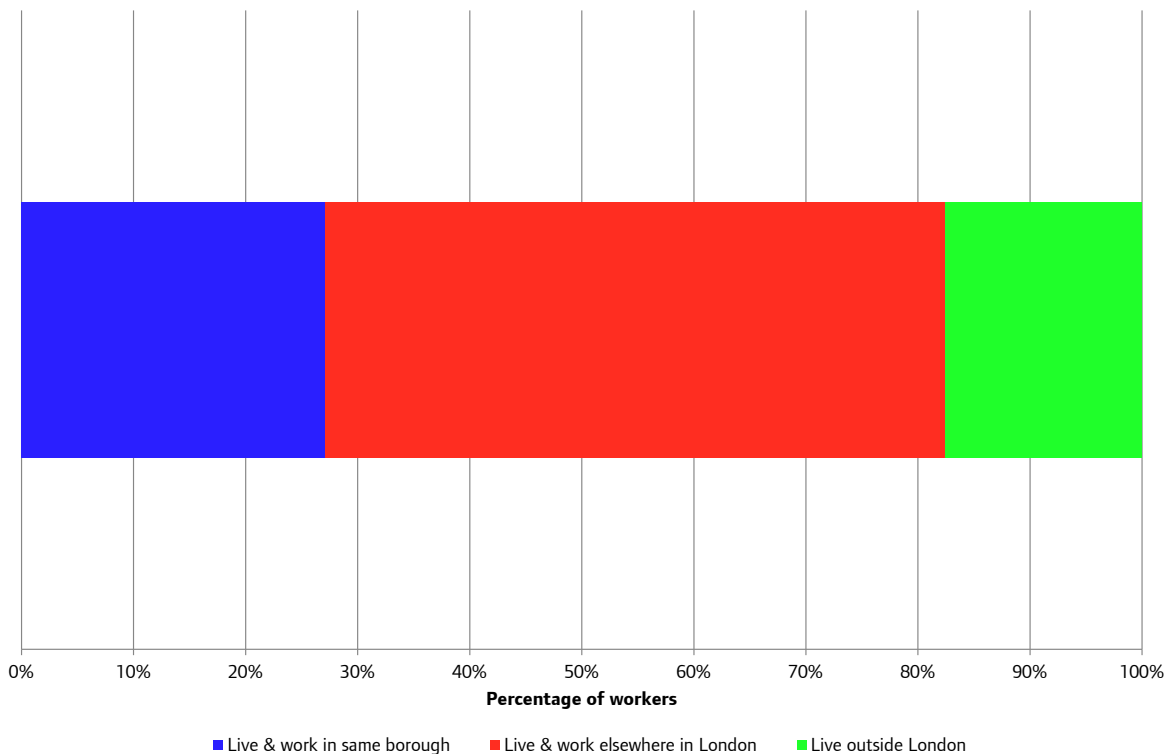


Source: Note: Commuters refer to 2011.

Source: GLA Intelligence 2015 mid-year population estimates, ONS Census 2011, ONS International Passenger Survey, Visit Britain GB Tourism Survey, Visit Britain GB Day Visits

When looking at the place of usual residence of London workers, one-in-six people working in London actually lived outside of its boundaries in 2011 (Figure 8.38).

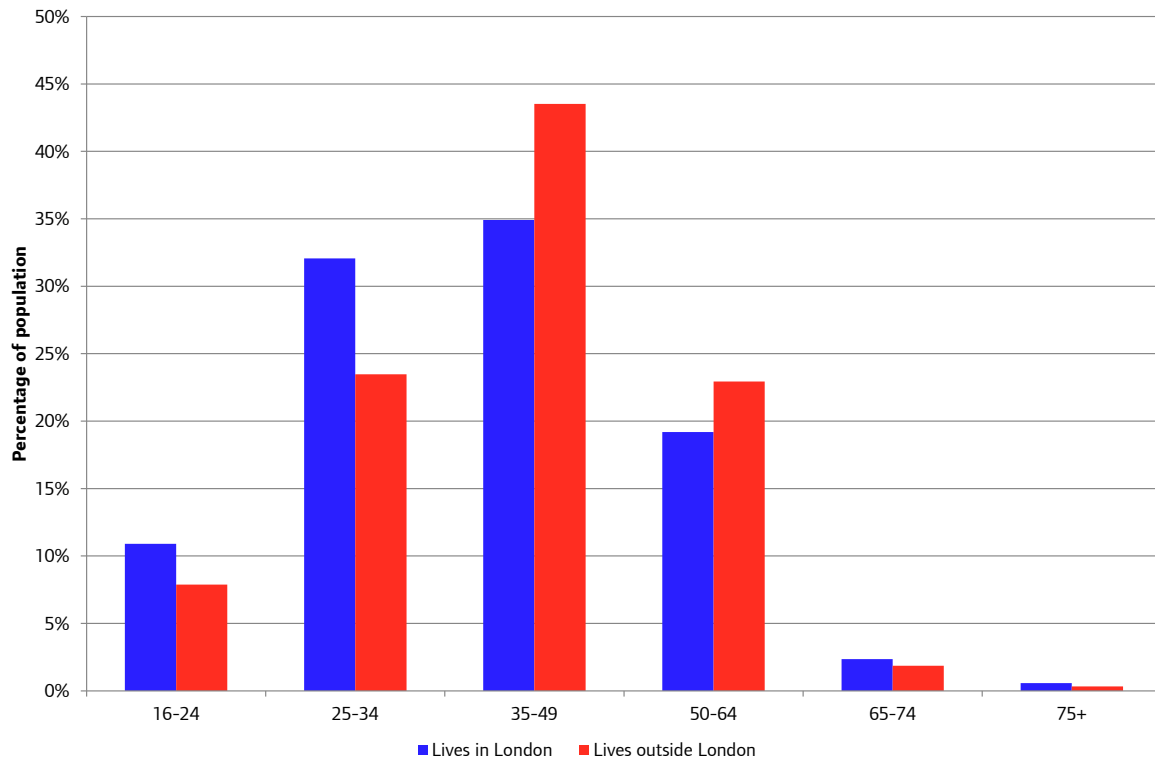
**Figure 8.38: Place of usual residence of London workers in 2011**



Source: ONS Census 2011

There were some significant differences between these populations. For a start, those who lived in London tend to be younger than those who commute in as shown in Figure 8.39.

**Figure 8.39: Age of workers in London by place of residence in 2011**

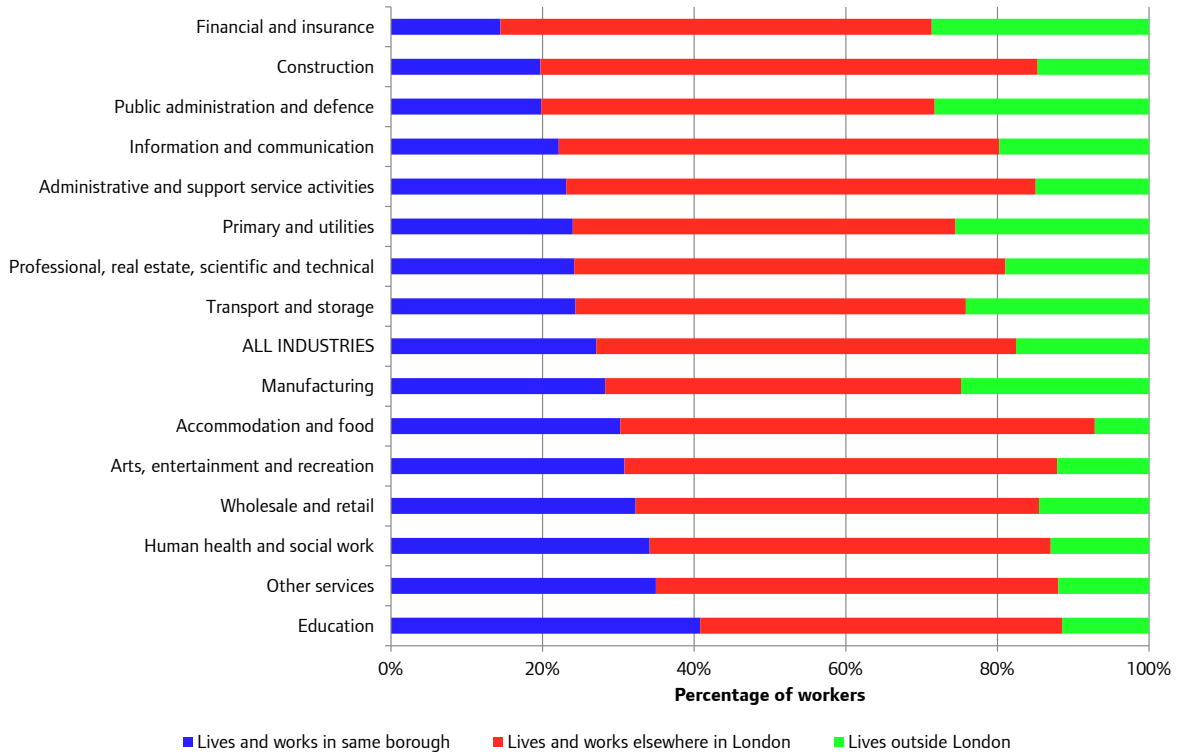


Source: ONS Census 2011

Finance & Insurance was the industry with the highest proportion of workers commuting into work from outside London (28.7 per cent) as shown in Figure 8.40. Meanwhile, the Accommodation and Food Services industry had the smallest proportion (7.2 per cent).

The Education industry saw the highest proportion both living and working in the same borough (40.8 per cent), while Finance & Insurance was the least likely industry for people to live and work in the same borough with just 14.4 per cent doing so.<sup>21</sup>

**Figure 8.40: Place of residence of London workers by industry in 2011**

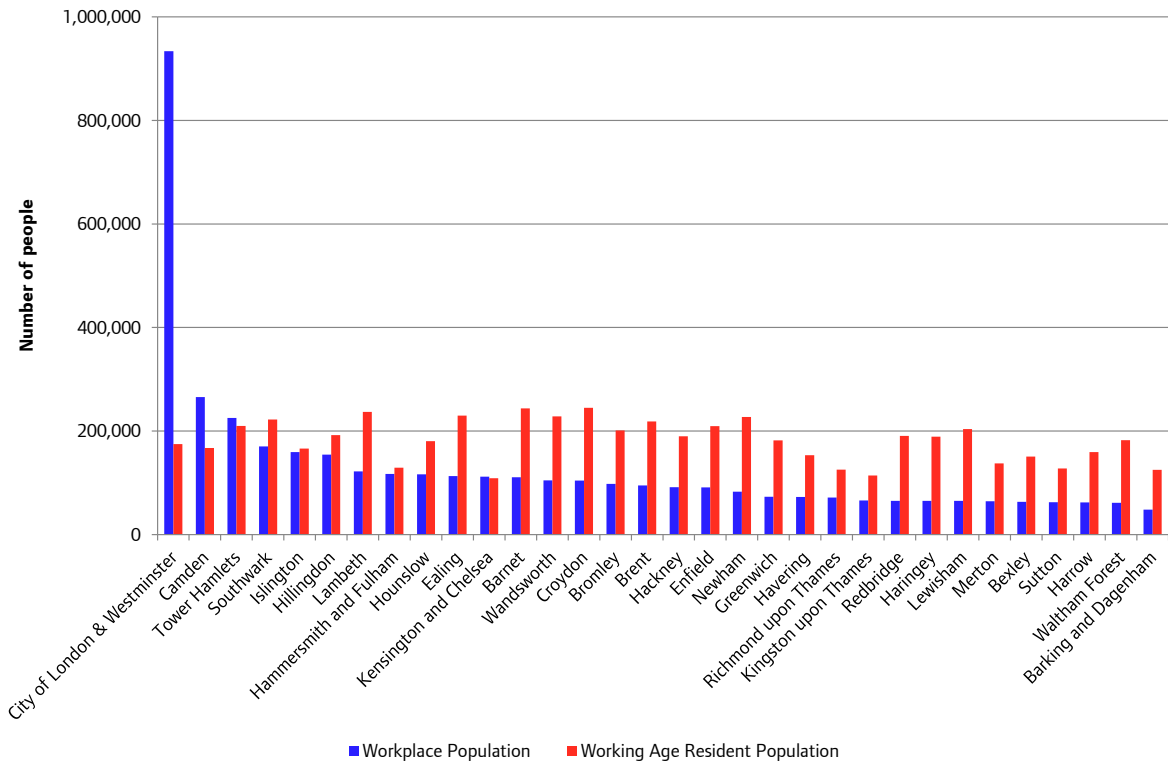


*Note: Data includes those working at no fixed point as working elsewhere in London. Similarly, those reported to mainly work from home are assumed to work in the same borough (irrespective of where the employer is based).*  
 Source: ONS Census 2011

Figure 8.41 shows that the workplace populations of Westminster & City of London, Camden and Tower Hamlets were all far larger than their usual resident populations. On the other hand, the workplace populations of outer London boroughs such as Barking & Dagenham, Sutton and Bexley see the opposite trend with comparably larger resident populations.



**Figure 8.41: Workplace and working age resident populations by London borough**



Note: Workplace population refers to 2011 and resident population refers to 2014.

Source: ONS Census 2011, GLA Intelligence 2015 mid-year population estimates

## Chapter 8 endnotes

- 1 Population of Austria, 2015: 8,623,073 (Source: Statistik Austria)  
Population of Switzerland, 2015: 8,279,700 (Source: Swiss Federal Statistical Office)
- 2 Greater London Plan 1944, Sir Leslie Patrick Abercrombie
- 3 Disability-free life expectancy (DFLE) estimates lifetime free from a limiting persistent illness or disability. This is based upon a self-rated assessment of how health limits an individual's ability to carry out day-to-day activities and, therefore, DFLE estimates are in part subjective.
- 4 Based on the GLA 2015 round trend-based population projections (long-term migration scenario). This bases the volume of migration flows on estimates for the period mid-2003 to mid-2014. Age and sex characteristics of domestic flows are based on a combination of origin-destination data from both the 2001 and 2011 Censuses. The GLA's trend-based projections use a cohort-component model which projects forward on the basis of recent trends in fertility, migration and mortality. It also includes assumptions about how these trends will change in future, e.g. life expectancy will continue to rise. While no development data is used in the model, past development influences the previous migration trends that are used to project forward. As such, this model implicitly assumes that recent development trends will continue in the future. Further details on the methodology can be found in Update 02-2016 <http://data.london.gov.uk/dataset/2015-round-population-projections/resource/8cb45509-626e-4845-acb0-f36383fc5704>
- 5 For example, see the Conservatives' manifesto 2015: <https://www.conservatives.com/manifesto>
- 6 Prime Minister's Office (2016). PM statement in Berlin, 20 July 2016. Available at: <https://www.gov.uk/government/news/prime-minister-theresa-mays-statement-in-berlin-20-july-2016>
- 7 The school-age population is taken to be those age 4 to 15 inclusive.
- 8 Primary school is taken to be children age 4 to 10 inclusive.
- 9 Secondary school is taken to be children age 11 to 15 inclusive.
- 10 The working-age population is taken to be those age 16 to 64 inclusive.
- 11 Fielding, A (1992). Migration and social mobility: South East England as an escalator region, *Regional Studies*, 26, 1, pg.1-15.
- 12 These figures are based on Long-Term International migrants who are taken by ONS to be those who change their country of residence for at least one year.
- 13 For a more comprehensive discussion on the differences between the LTIM and NINo see: <http://bit.ly/2cglA00>
- 14 GLA Economics (2009). Economic impact of an earned regularisation of irregular migrants.
- 15 Signoa, N & Hughes, V (2012). No way out, no way in: irregular migrant children and families in the UK, COMPAS Research Report.
- 16 Home Office Migrant Journey (sixth report).
- 17 Source: ONS APS 2014
- 18 This includes France, Germany, Italy, Portugal, Spain, Aland Islands, Austria, Belgium, Denmark, Finland, French Guiana, Gibraltar, Greece, Guadeloupe, Luxembourg, Martinique, Netherlands, Reunion, Sweden.
- 19 A communal establishment is an establishment providing managed residential accommodation; "managed" in this context means full-time or part-time supervision of the accommodation. Types of communal establishment include hotels, hospitals and student accommodation.
- 20 This is based on data from the ONS International Passenger Survey and Visit Britain's GB Tourism Survey and GB Day Visits. The 'per day' figures have been calculated by dividing the total annual number of visitors to London with the number of days. However, tourism is seasonal, so the estimate should be treated as an average.
- 21 This analysis excluded anyone with no fixed place of work as there is no way to know whether or not they work in London or not. A large number working in construction had no fixed place of work.