



## What is driving population change in London?

### Key points

- The ONS 2017 mid-year population estimate for London reported the smallest annual increase in the population since 2011.
- London's population grew by 0.6% from 2016 to 2017, roughly halving the increase from the previous year.
- For the first time since 2011, London's population growth did not exceed that of England.
- There was a higher increase in Inner London than Outer London although the population of Inner London still remains around a third of the total London population.
- The London population of those aged in their twenties is decreasing, whilst the number of people in the older age groups is increasing (which has implications for the available workforce).
- The ONS mid-year estimates for 2012 to 2016 were revised earlier this year (in March 2018). Overall, this resulted in a reduction in the mid-year 2016 estimate for London of 18,233 people (a decrease of 0.2%). However, not all London boroughs had a decrease.
- The number of live births, and the total fertility rate for London, both decreased in 2017. Over time this decrease in live births would be expected to contribute to the plateau in population statistics.
- There was a small increase in the number of deaths but when expressed as a population rate, mortality decreased.
- For the first time since 2011, in 2017 there was a net outflow of migration (fewer people) in London. In 2017, more people who remained in the UK left London than moved here (internal migration) and fewer people than previously migrated to the capital from other countries (international migration). This resulted in a net deficit of 23,000 people due to migration (taking into account both internal and international flows).

### Introduction

The latest ONS mid-year population estimate for London represents an increase of just 0.6% since the previous year and is the smallest annual increase since 2011 (an estimate of 8,825,001 people living in the capital in 2017). This is the first time since 2011 that London's population growth has not exceeded that for England (England's rate is the same, an increase of 0.6%). This short briefing explores the drivers for this plateau in the population, considering the impact of the components of change individually, i.e. population estimate revisions, births, mortality, internal and external migration, in order to gain an insight into the current situation in the capital.

# 1. The Population

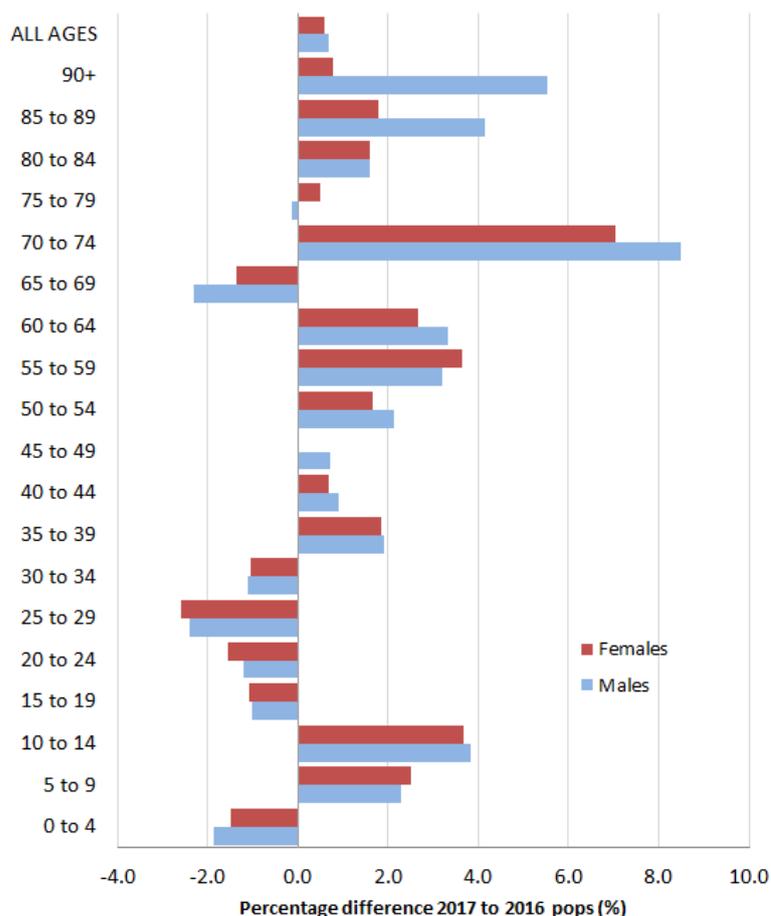
## ONS Population Estimates

The ONS 2017 mid-year population estimate for London was 8,825,001, an increase of 55,342 (+0.6%) from 2016, roughly halving from the previous year (+1.2% from 2015 to 2016). The population of Inner London remains a third of the total London population, although a higher increase was seen in Inner London<sup>1</sup> (1.0%) than Outer London (0.4%) compared to 2016. There was a slightly higher proportional increase in males (0.7%) compared to females (0.6%).

This was the smallest annual increase since 2011 and is the same as for England. This is the first time since then that growth in London has not been greater than for England.

When broken down by five year age band, the largest percentage decrease was in the 2017 London population of 25-29 year olds (-2.5%) (Figure 1). There were also decreases in the 0-4, 15-19, 20-24, 30-34 and 65-69 year age groups. The largest percentage increases were in the older ages, with 70-74 years olds having the greatest (7.7%). There were also substantial increases in the population of children aged 5-9 years (2.4%) and 10-14 years (3.8%).

**Figure 1: Difference between mid-year estimates for 2017 and 2016 (revised) populations by age group and sex, London**

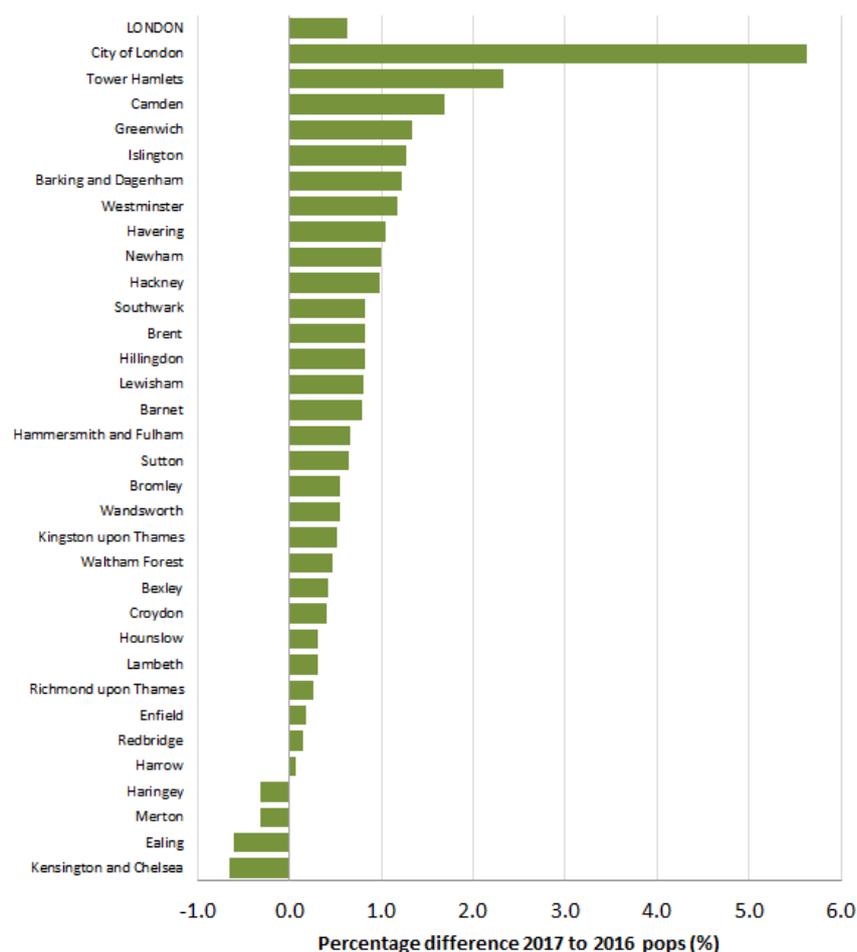


London local authorities with the largest percentage increases since the previous year were City of London (5.6%), Tower Hamlets (2.3%), Camden (1.7%), Greenwich and Islington

(both 1.3%) (Figure 2). Conversely four boroughs had a population decrease: Kensington & Chelsea (-0.7%), Ealing (-0.6%), Merton and Haringey (both -0.3%).

Compared to 2011, the London borough with the highest percentage increase in population was Tower Hamlets which had over 20% more residents in 2017. Only Kensington & Chelsea had a lower proportion of residents in 2017 compared to 2011 (-1.6%).

**Figure 2: Population difference between 2017 and 2016 (revised) populations by London borough**



### Impact of revised ONS population estimates from 2012 to 2016

The ONS made improvements to the population estimates for England and Wales from mid-2012 to mid-2016. Revised figures published in March 2018 include new estimates of local authority international emigration and foreign armed forces dependants. The main points are:

- The distribution of people aged in their 20s and 30s has changed more than for other age groups, resulting from the use of an updated emigration model and more timely data becoming available to distribute immigration for mid-2015 and mid-2016.
- Overall, the impact of the revisions was that for 96% of all local authorities, differences are less than 1% from the original estimates. However, 212 authorities had upward revisions (population increases) and 136 had downward revisions (decreases).

- The population of one local authority (**Wandsworth**), was revised upwards by more than 5,000 people, whilst four were revised downwards by more than 5,000 people including two in London (Cambridge, **Haringey**, Oxford and **Westminster**).
- No areas were revised upwards by more than 5% of the total population, but two (Cambridge and **City of London**) were revised downwards by more than 5%.

Population decreases were mostly due to higher emigration estimates for areas containing international students (which includes London), and lower immigration into Inner London. The distribution of people aged in their 20s and 30s changed more than for other age groups.

In more detail: The impact of population revisions for London was to reduce the mid-2016 estimate by 18,233 (a decrease of 0.2%), from 8,787,892 down to 8,769,659 (Table 1). This affected a higher number of males (10,090) than females (8,143) but the proportional decrease was the same for both genders (0.2%). The largest percentage decrease was for 20-24 year olds (0.6% decrease), followed by 25-34 year olds (0.3% decrease).

There was a greater fall in the proportion of the population in the Inner London boroughs (0.4% decrease) than in Outer London (0.1% decrease), although not all London boroughs had a reduction in their population following the ONS revisions. Figure 3 shows the proportional difference in the population for each borough.

**Table 1: Population difference between original and revised populations, London 2011 to 2016**

Population estimates	2011	2012	2013	2014	2015	2016
<b>London - original</b>	8,204,407	8,308,369	8,416,543	8,538,689	8,673,713	8,787,892
<b>London - 2018 revisions</b>	8,204,407	8,308,833	8,417,458	8,539,398	8,666,930	8,769,659
<b>Difference</b>	0	464	915	709	-6,783	-18,233
<b>Difference %</b>	0.0%	0.0%	0.0%	0.0%	-0.1%	-0.2%

Four London boroughs had gains in their population of over 1% in 2016 following revision - Wandsworth (1.7%), Camden and Hammersmith & Fulham (1.2% each) and Newham (1.0%). The population estimate for the City of London decreased by 22.9%, and Haringey and Westminster fell by 2.3% each.

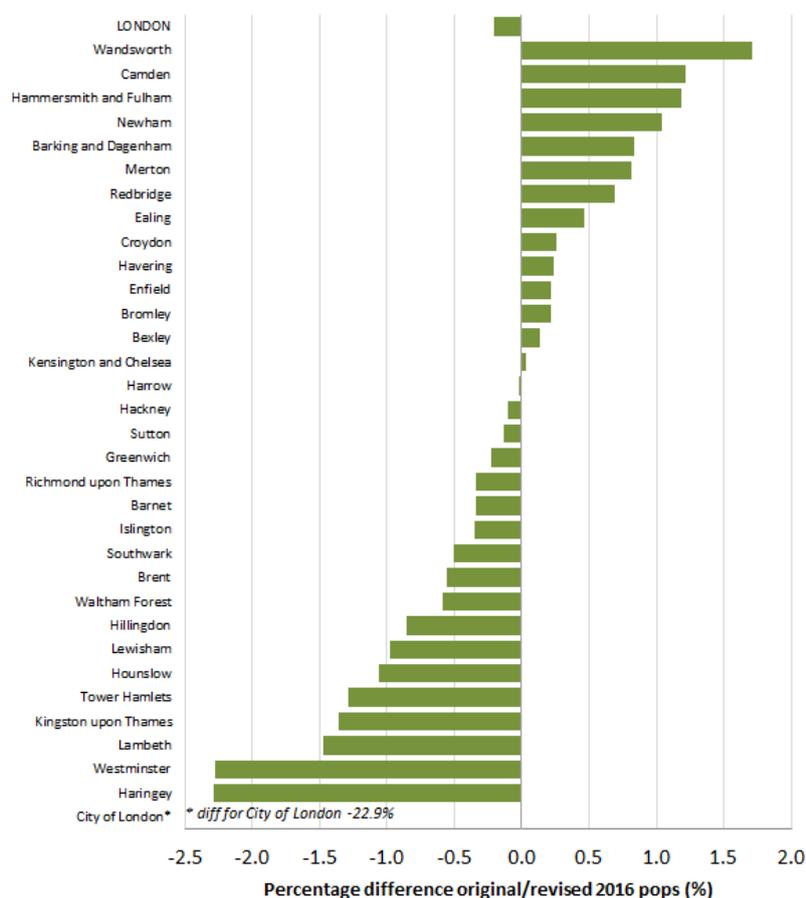
The largest change was due to international immigration. Over the five years from 2012 to 2016 revisions reduced estimates by 20,582 people. The change for each individual year is shown in Table 2 which shows that the main decreases were towards the end of the period, in 2015 and 2016.

**Table 2: Population difference between original and revised international immigration, London 2011 to 2016**

International Immigration	2012	2013	2014	2015	2016	2012-2016
<b>London - original</b>	176,350	170,042	200,902	221,106	220,908	989,308
<b>London - 2018 revisions</b>	176,340	170,054	200,902	212,837	208,593	968,726
<b>Difference</b>	-10	12	0	-8,269	-12,315	-20,582
<b>Difference %</b>	0.0%	0.0%	0.0%	-3.7%	-5.6%	-2.1%

The next biggest change was from international emigration which over this time reduced by 1,736, a decrease of 347 people per year (a decrease increases the population).

**Figure 3: Population difference between original and revised populations by London borough for 2016**

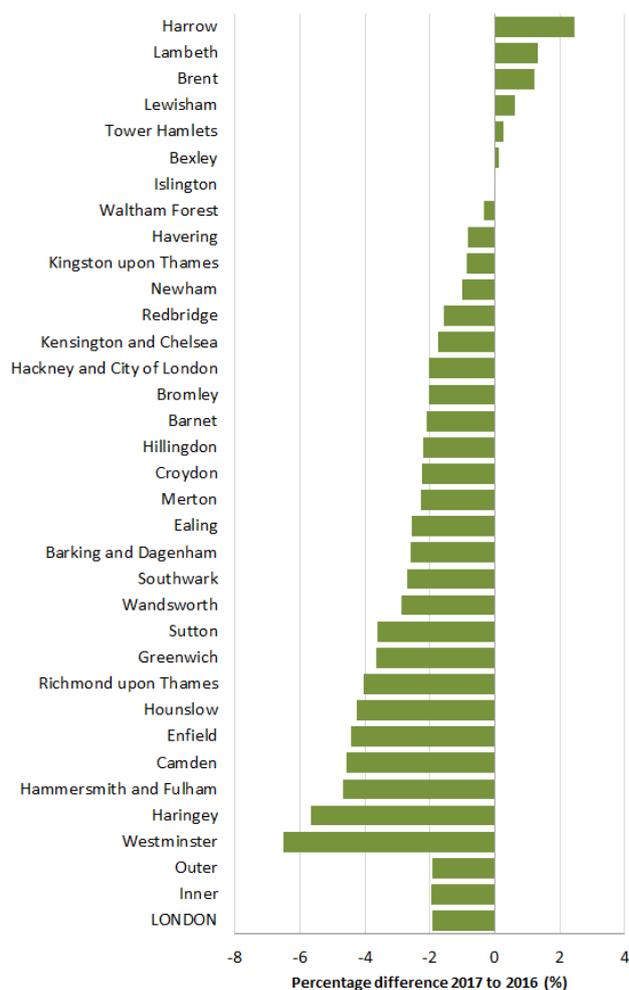


## 2. Births

The number of live births decreased in London in the latest year. There were 126,308 live births in the capital in 2017, the lowest number since 2008. This represents a decrease of 1.9% since the previous year though is a smaller decrease than for England overall (2.5%). The proportion of live births decreased in both Inner and Outer London by 1.9% compared to 2016. Westminster had the largest percentage decrease in live births in 2017 (-6.5% compared to 2016). Harrow had the greatest increase in the number of live births (2.5%) (Figure 4). The total fertility rate in London was lower (1.70) than for England (1.76) and the rate decreased since 2008 both for London and nationally (from 1.95 and 1.97 respectively). The rate varies considerably by borough and was highest in Barking and Dagenham (2.37) and lowest in Camden (1.17) in 2017.

Over time this decrease in live births would be expected to will contribute to the plateau in population statistics.

**Figure 4: Percentage difference between live births by London borough, 2017 compared to 2016**



### 3. Mortality

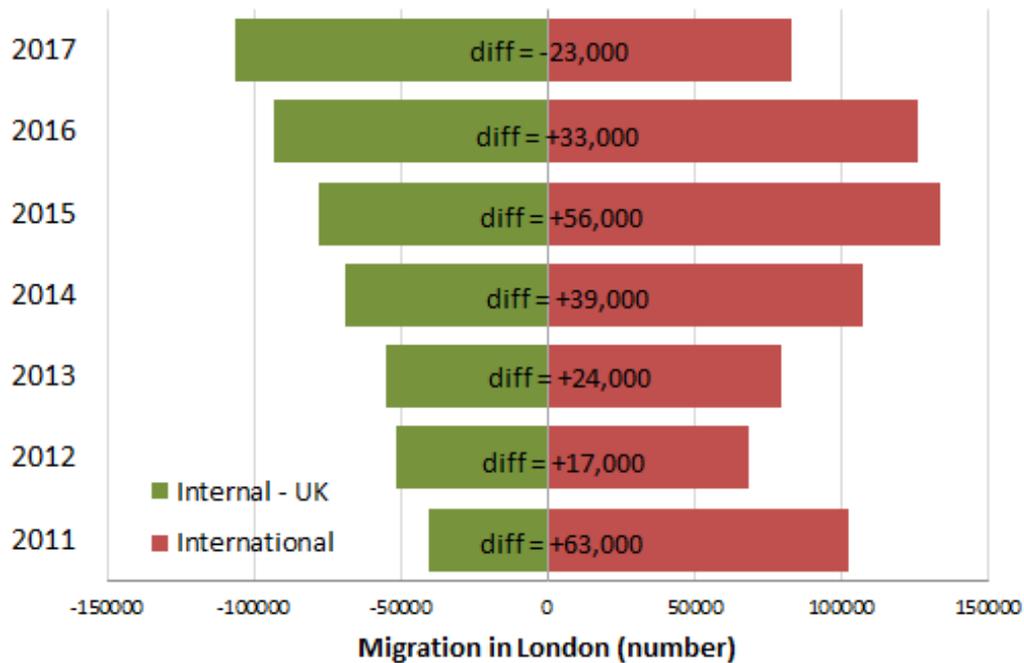
In 2017, there were 49,412 deaths in London, more than in 2016 (48,606 deaths).

However, when expressed as a rate per population, deaths decreased. The age-standardised mortality rate for London was lower (better) than for England at 856.6 per 100,000 and there was a decrease compared with 2016. The 2017 standardised mortality ratio (SMR) was 88 for London, indicating fewer deaths than expected given the size and age structure of the population.

### 4. Migration

In 2017, more people who remained in the UK left London than moved here (internal migration), and fewer people migrated to London from other countries (international migration) than in previous years. In 2017, net internal migration to the UK for London was approximately -107,000 people (more people leaving London to go to the rest of the UK than entering London from other parts of the UK); whilst the net gain in international migration to London was approximately 83,000 people. Therefore, more people left London in 2017 than arrived (Figure 5) resulting in a deficit of approximately 23,000 people. This was the first time since 2011 that there was a net outflow of migration (fewer people) to London taking into account both internal and international migration.

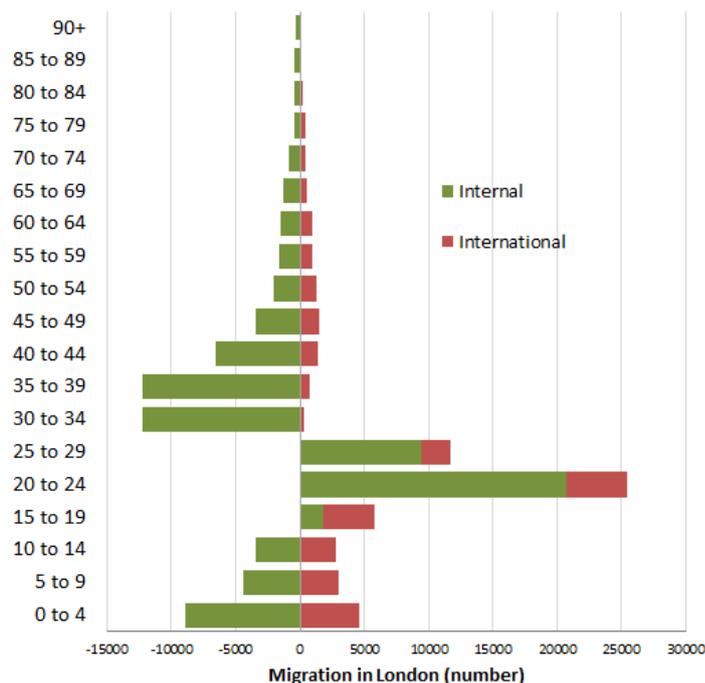
**Figure 5: Net migration for London, 2011 to 2017**



There was no significant difference between male and female migration in 2017 – there was a deficit for both males (11,000) and females (12,000). There was a marked difference by age however (Figure 6). International migration continued to show an overall surplus in net migration for all ages although numbers have dropped from the previous year.

There was a decrease in the net numbers of children aged 0 to 14 and in adults aged 30 and over from internal migration, whereas for ages 15 to 29 there was an increase for both internal and international migration.

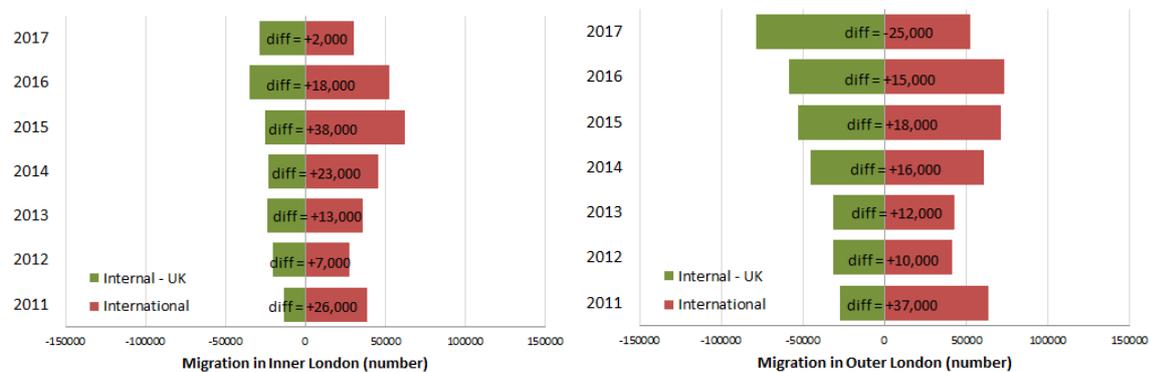
**Figure 6: Net migration for London by age group, 2017**



## Migration pattern differences in inner and outer London

There is a difference between migration patterns in Inner and Outer London. Outer London had a deficit of approximately 25,000 people in 2017. Conversely the population of Inner London gained approximately 2,000 people due to migration in 2017 (Figure 7).

**Figure 7: Net migration for Inner and Outer London, 2011 to 2017**



## Discussion

This briefing focusses on what the relevant statistics show as opposed to the reasons for this change. However, there is well documented uncertainty around current and future patterns of migration due in part to Brexit following the EU referendum. Devaluation of the pound makes the UK less attractive for people coming to work in the UK, and the accessibility and affordability of housing will impact on the socio-demographic profile of London over time.

Migration statistics seem to point to an outflow of adults of parental age and children, mainly from outer London boroughs.

Over time there could be a potential impact on the availability of the London workforce in light of the decline in the numbers of young people. Further, population growth in the older age groups could impact on the ratio of carers to dependents.

We are now more than half way between decennial censuses (the last was 2011), so uncertainty around estimates should be acknowledged. After the next census in 2021 we will know more about the size and components of the London population.

## Sources

### Births

Birth summary tables in England and Wales: 2017. Available at:

<https://www.gov.uk/government/statistics/birth-summary-tables-in-england-and-wales-2017>

### Migration

International migration. Available at:

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/internationalmigration>

Migration within the UK. Available at:

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/migrationwithinthek>

ONS. Local Area Migration Indicators, UK. Available at:

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/migrationwithinthek/datasets/localareamigrationindicatorsunitedkingdom>

#### *Mortality*

Death registrations in England and Wales, summary tables: 2017. Available at:

<https://www.ons.gov.uk/releases/deathregistrationsinenglandandwalessummarytables2017>

#### *Population*

Population estimates for UK, England and Wales, Scotland and Northern Ireland: mid-2017.

Available at:

<https://www.ons.gov.uk/releases/populationestimatesforukenglandandwalesscotlandandnorthernirelandmid2017>

Revised population estimates for England and Wales: mid-2012 to mid-2016. Available at:

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/bulletins/annualmidyearpopulationestimates/mid2012tomid2016>

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<sup>1</sup> London Councils. List of inner/outer London boroughs. <https://www.londoncouncils.gov.uk/node/1938>