

GREATER LONDON AUTHORITY

Housing and demography in the wider south east – informal discussion

Friday 25th October 2013

2:00 pm committee room 5 (lower ground floor)

City Hall, London

Please see over page for directions to City Hall

A G E N D A

1. Chair's welcome
Richard Linton, Principal Strategic Planner, GLA Spatial Strategy
2. population growth, demographic change, London out-migration
Richard Walker, Demography and Policy Analysis Manager, GLA
Demography & Policy Analysis Group
3. the direction of travel of the Further Alterations to the London Plan, and
housing numbers in London and the wider south east
John Lett, Strategic Planning Manager, GLA Spatial Strategy

City Hall location

About ten minutes' walk from London Bridge station and fifteen from Tower Hill, you'll find City Hall on the south bank of the Thames. Look for the distinctive curved glass building just along from HMS Belfast.



Key:

	GLA - City Hall		Docklands Light Railway		Train station
	Underground station		Taxi drop-off point		Roads
	Footpath		Bus stop		Potters Fields Park

Underground and railway stations:





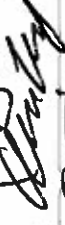










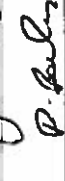
- London Bridge (Jubilee and Northern lines and mainline station)
- Tower Hill (Circle and District lines)
- Tower Gateway (Docklands Light Railway)

Buses: 42, 47, 78, 381, RV1

River services: to London Bridge City Pier, also Tower Millennium Pier and St Katharine's Pier

Bicycle: bicycle racks are available at City Hall, on the south side of the building by Potters Fields Park.

Housing and demography in the wider south east

Name	Organisation	Email	Sign
Matthew Jericho	ESSEX COUNTY COUNCIL	matthew.jericho@essex.gov.uk	
Lauren Gray	LB HAVERING	lauren.gray@havering.gov.uk	
Amanda Raffaelli	CASTLE POINT BC	araffaelli@castlepoint.gov.uk	A Raffaelli
Richard Hatter	THURROCK BC	rhatter@thurrock.gov.uk	
Philip Buzo	WATFORD BD	philip.buzo@watford.gov.uk	
Clare Loops	LB Bexley	clare.loops@bexley.gov.uk	
Geoff Dawes	Spelthorne BC	g.dawes@spelthorne.gov.uk	
S. Zaman	Brantford BC	sumazaman@brantford.gov.uk	
I. Bailey	Tonbridge & Malling BC	ian.bailey@tmbc.gov.uk	
S. Janota	SURREY CC	sue.janota@surreycc.gov.uk	S.J. Janota
R. EVERSDEN	London Forum	london_forum@londonforum.co.uk	
M. Howell	WANDSWORTH COUNCIL	mhowell@wandsworth.gov.uk	
T. HARVEY	LB HLF	thw.harry@hlf.gov.uk	
Kimberley Hopkins	Westminster City Council	khopkins@westminster.gov.uk	
Sule Nisancioglu	LB Haringey	Sule.Nisancioglu@haringey.gov.uk	
Jade Look	ADS	jade.look@ads.gov.uk	
Jean Marshall	Tonbridge Wells BC	jean.marshall@tonbridge.wells	
BEN BOWLES	KEETFORDS HINE COUNCIL	ben.bowles@keetfordshire.gov.uk	

Housing and demography in the wider south east

Name	Organisation	Email	Sign
JOHN CHESTON	REIGATE & BANSTEAD BC.	john.cheston@reigate-banstead.gov.uk	JK
ANDREW TAYLOR	UTTERSFORD DISTRICT COUNCIL	ataylor@utterford.gov.uk	ATK
Tammy Riordan	LB Lambeth	triordan@lambeth.gov.uk	TRiordan
Mike Holford	Brighton & Hove City Council	Mike.Holford@brighton-hove.gov.uk	M.Holford
Ted Pearson-Knox	Crawley Borough Council	Ted.pearson-knox@Crawley.gov.uk	TK
PETER SHADBOULT	CITY OF LONDON	peter.shadbolt@cityoflondon.gov.uk	PS
ROBIN MILLER-STOTT	SOUTH LONDON PARTNERSHIP	temp1@southlondonpartnership.co.uk	RM
MATTHEW PATERSON	LB HAREWILL	matthew.paterson@harrow.gov.uk	MP
EDWERT TOWNHALL	Woking BC	edwerts@woking.gov.uk	ET
TRACEY HARRIS	"	tracey.harris@woking.gov.uk	TH
MARY MANUEL	LB BROMLEY	mary.manuel@bromley.gov.uk	MM
Richard Bant	DLA	richard.bant@campanella-jr.co.uk	RB
Byre Tudball	Westmore Borough Council	byre.tudball@westmore.gov.uk	BT
DAVID HUGHES	LB KENSINGTON	david.hughes2@kensington.gov.uk	DMH
John Phillips	Tandridge District Council	jphillips@tandridge.gov.uk	J.Phillips
Tania Smith	Dartford BC.	Tania.smith@dartford.gov.uk	T Smith
John Preston	SPRING FORTRESS DC.	jpreston@springfortressdc.gov.uk	J. Preston
Steve Walker	Environment Agency	steve.walker@environmental.gov.uk	SW

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Further Alterations to the London Plan

Emerging policy proposals



Proposed purpose of the Further Alterations to the London Plan (FALP)

- Develop concept of the Plan as the ‘London expression of the National Planning Policy Framework’;
- Provide robust, interim planning framework to address the key housing and employment issues arising from a substantial increase in population and to support recession recovery, until the long term implications of these are clear
- Minor changes in terms of fact; changes in national policy; support for the Mayor’s Housing and other strategies and where relevant address other advice to the Mayor eg from the Outer London Commission.

London's demographic challenge

- London population 2001 (revised): 7.34 mll
 - London population 2011 (Census): 8.17 mll
- = 83,000 pa increase

BUT

London Plan 2011 – 2031 assumes 51,000pa

AND

new GLA trend projection 2011 – 2036 suggests 76,000 pa, and over 100k in earlier years....

Emerging spatial proposals

- Wider South East: GLA Act duty to inform/ Localism Act Duty to Cooperate
- Olympic legacy: carrying this forward through LLDC
- CAZ: review mixed use policy in light of loss of offices to resi
- Opportunity/Intensification Areas: encourage higher densities
- Town centres: update network and respond to multi-channel challenge: mixed use, largely resi led intensification
- Industrial locations: encourage managed release of surplus around transport nodes
- Strategic Outer London Development Centres: new eg Crystal Palace, Royals, White City, Golden Mile

Emerging housing proposals: requirements

- CLG currently suggests c52,000 more households pa to 2021(cf 34k)

BUT

- Is this a realistic basis for planning?
Outdated hhld formation rates; what happens if recent changes are cyclical/short term? Accept “planning for uncertainty” – central theme for FALP and LHS
- **New SHMA:** ranges around GLA central hhld projection (40k); backlog of need (10 or 20 yrs?); other factors eg second homes? = 50-60k pa working proposition

Emerging housing proposals: supply

- New NPPF compliant, needs driven SHLAA
- More rigorous approach to exclusions, probabilities, phasing : challenge based: c40k pa cf 32k
- ‘Potential’ large sites confidential; ‘identified’ sites public
- More broadly based scenario testing, including ‘need’, town centre and Opp Area potential
- Maintain single figure borough provision targets
- Handling the ‘gap’ between requirements and capacity: Opp Area/Town centres/Indust release; PMM; early review

Emerging housing proposals: density

- maintain current 'SRQ' based approach (possibly update through full Plan review)

BUT

- flag scope for higher densities in town centres, OAs, surplus industry (+PRS (Ch 2))
- recognise importance of sustaining local character in suburbs (Ch2)

Emerging housing proposals: quality including play

- Maintain current approach
- Allow standards to bed down
- CLG standards review: London's distinct circumstances (NB scale of provision, densities) justifies maintaining London's approach

Emerging housing proposals: large developments

- Emphasise importance to provision and potential for large scale PRS
- Stress role of OAPFs in bringing forward capacity

Emerging housing proposals: choice

- Maintain same priority for affordable family housing
- Older persons special needs - significant growth: recognise distinct economics; allocate sites; mainly private, new forms of intermediate?
- Student accommodation - Academic Forum: scale and distribution; dispersal; affordability; links to unis; quality; partnership working
- PRS – recognise distinct economics (funding, design, amenity) in line with NPPF
- Custom build, ex-forces needs - support

Emerging housing proposals: mixed communities and affordable

- Update needs figures in light of new demographics
- Better links with London Housing Strategy
- Otherwise maintain policy

Emerging housing proposals: existing stock and future investment

- Update in light of Housing Strategy
- Barriers to Delivery - translating approvals to completions: distinguish build out rates; speculators; genuine barriers (planners et al)
- Clarify importance of viability: S106, CIL in light of new regs/N Devon

Emerging housing proposals: social infrastructure

- Flexibility to enable social infrastructure providers to ensure continued delivery (e.g.in community safety and health)
- Clarify new role of public health in Boroughs and links to planning
- Stronger support for free schools
- Underscore playing fields need assessments

Emerging economic proposals

- New employment projections (34k pa cf 33k)
- New industrial, office, retail, tourism demand/supply assessments –up date policies
- Significant update to town centres/retail policy
- Minor update to industry
- Possible updates to CAZ office policy – more protectionist?
- New clustering policy nb for betting shops, possibly takeaways
- Support for pubs, SMART London

Emerging proposals on climate change

- New policy promoting strategic power infrastructure provision
- Minor updates on flood risk, Thames Estuary 2100, Drain London
- Minor updates on water mgmt and infrastructure eg Tideway Tunnel
- Minor updates to municipal & C/I waste arisings & apportionments, and on hazardous waste

Emerging proposals on transport

- Highlight importance of Xrail 2 as next major infrastructure project
- Possible framework for HS2 in London
- Update table of infrastructure commitments
- Refine parking policy to make more sensitive to Outer London

Emerging proposals on places and spaces

- Clarify Lifetime Neighbourhoods Policy
- Expand on neighbourhood planning, incl. Community Rights
- Clarify Designing out Crime
- Update noise policy
- Updates policies on POS, geology, trees, burials, World Heritage Sites, resilience to emergency, public realm mgmt
- Blue Ribbon Network: new section on Royals

Emerging proposals on implementation

- New policy to support effective infrastructure development and delivery
- Greater flexibility on S106 priorities

Thoughts?



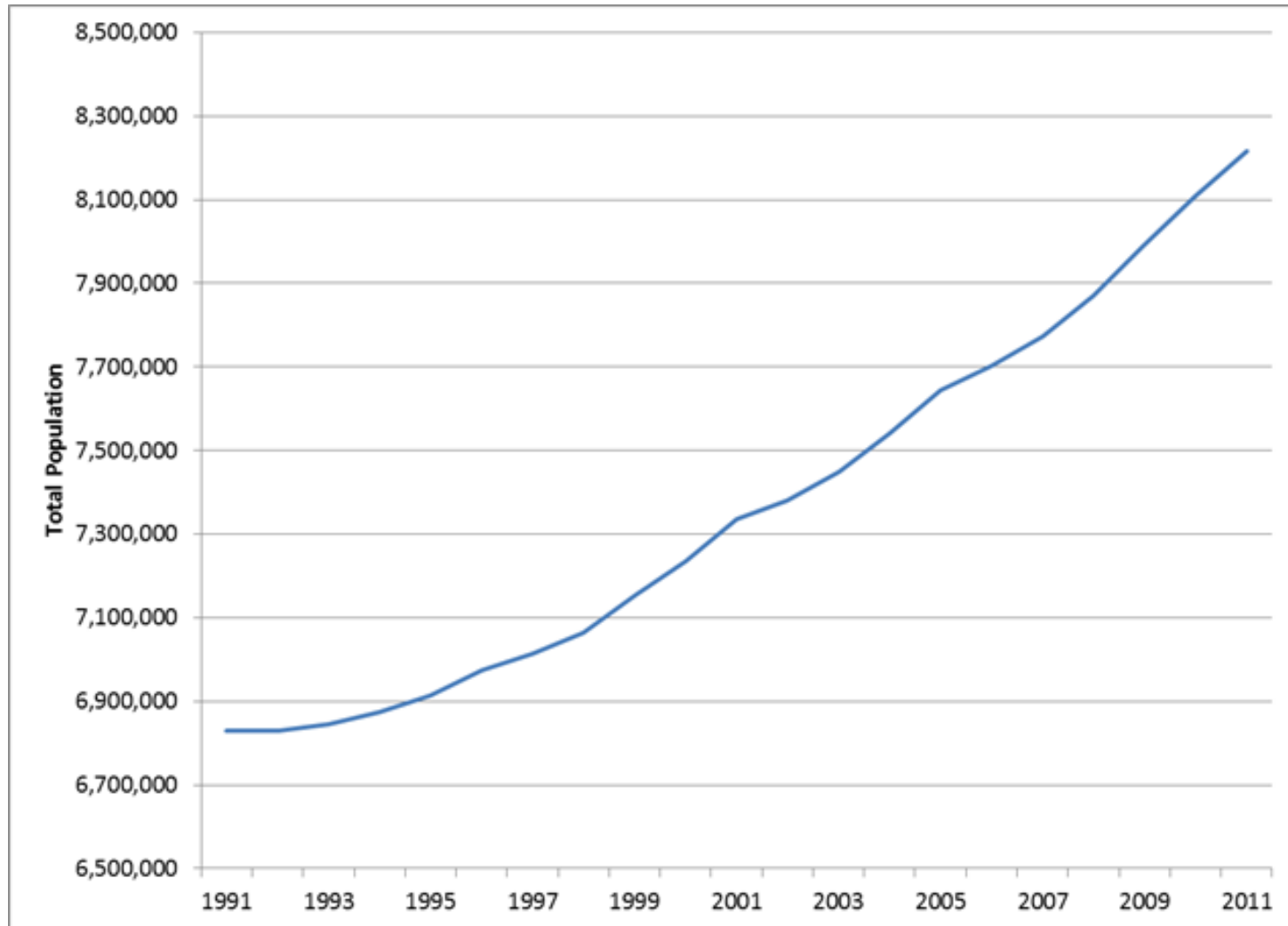
GLA population and household projections for FALP

**Ben Corr
Intelligence Unit**

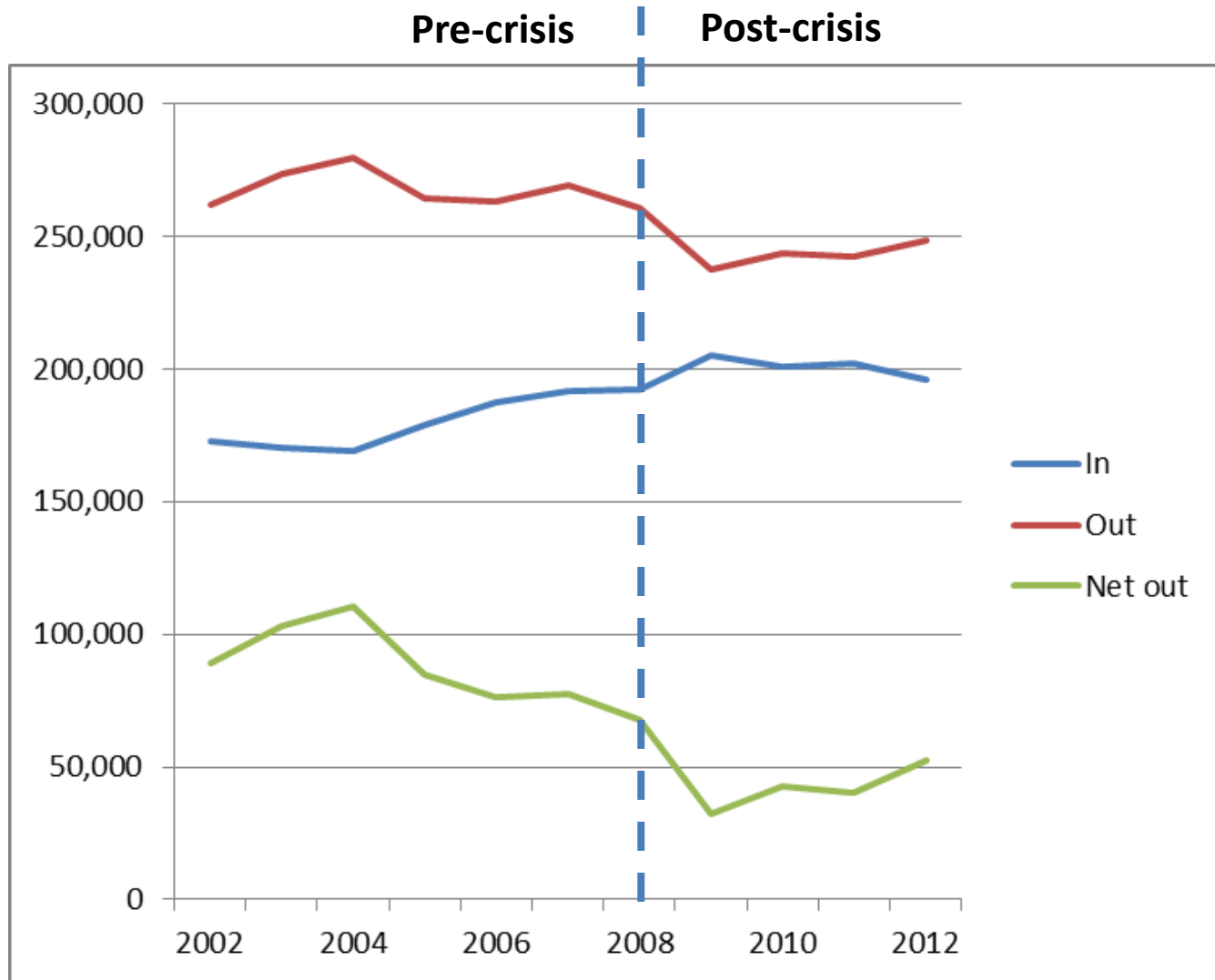
Content

1. Population projections
 - Recent trends
 - Projection scenarios
 - Results
2. Household projections
 - Historic household size trends
 - Household model adopted
 - Drivers of household growth
 - Results

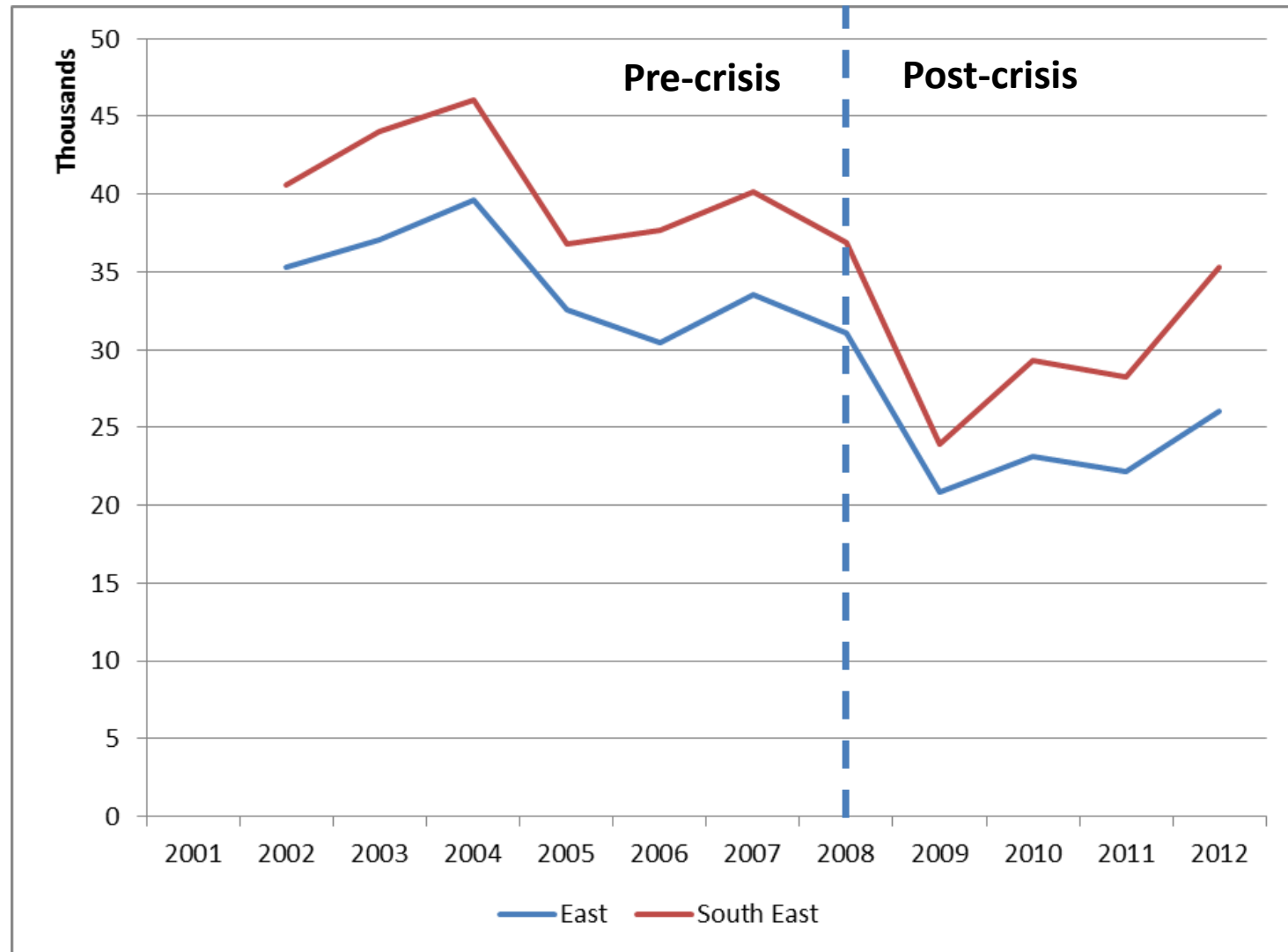
Population – since 1991



Recent trends – domestic migration



Net outmigration to wider South East



Impact of economic crisis

- Domestic out-migration from London fell
- Domestic in-migration to London rose
- Both linked to:
 - housing market/availability of credit
 - Relative strengths of London/UK job markets
- Net out-migration from London fell
 - From >75k pa before
 - To <50k pa after

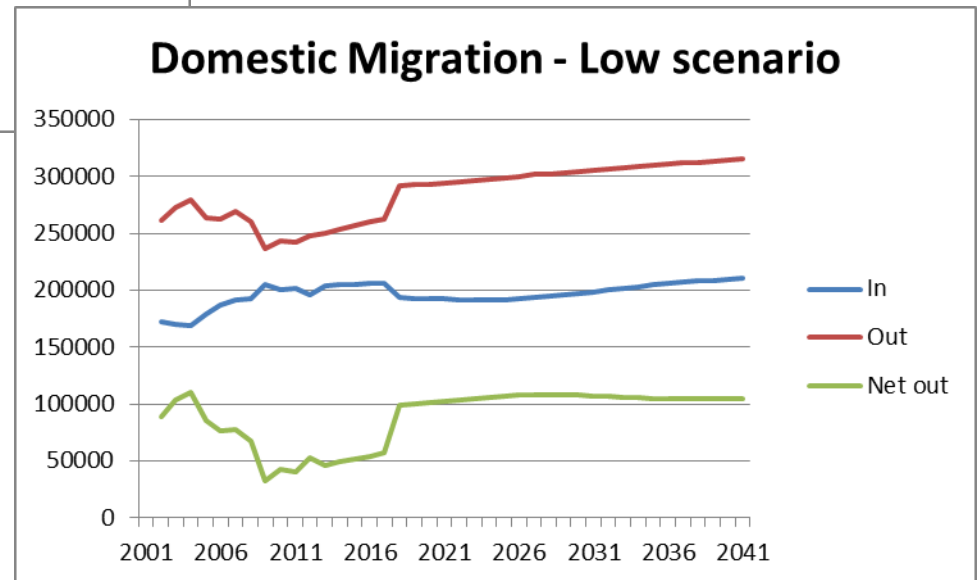
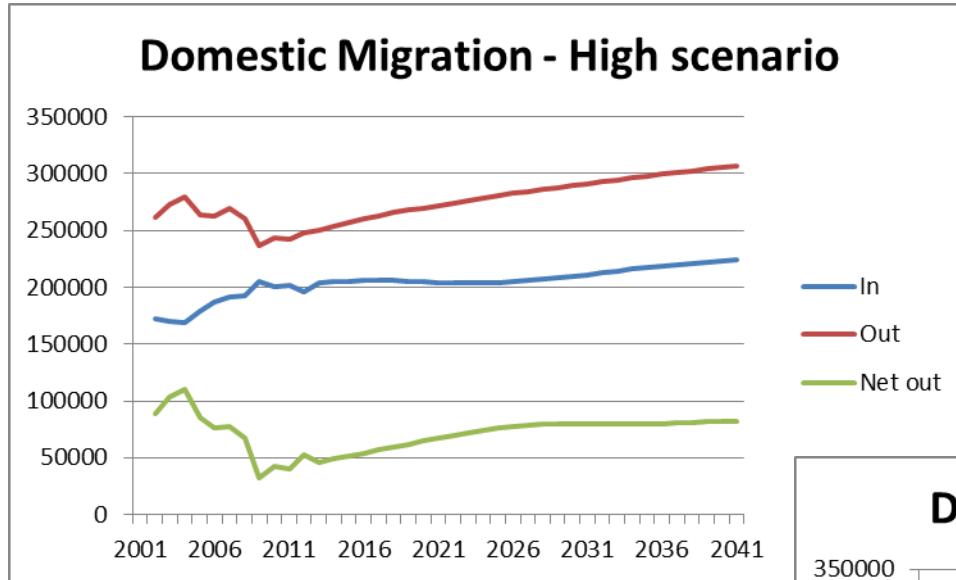
Impact of economic recovery

- Range of views on impact of recovery:
 - It will have no effect; the changes are structural and here to stay
 - London has adapted to increasing numbers of families staying in recent years and has become a more attractive place to raise children as a result
 - Migration patterns will revert to pre-crash norms
 - The changes in migration are entirely transient and due to problems in the housing and job markets - once these are resolved migration will return to pre-crisis patterns

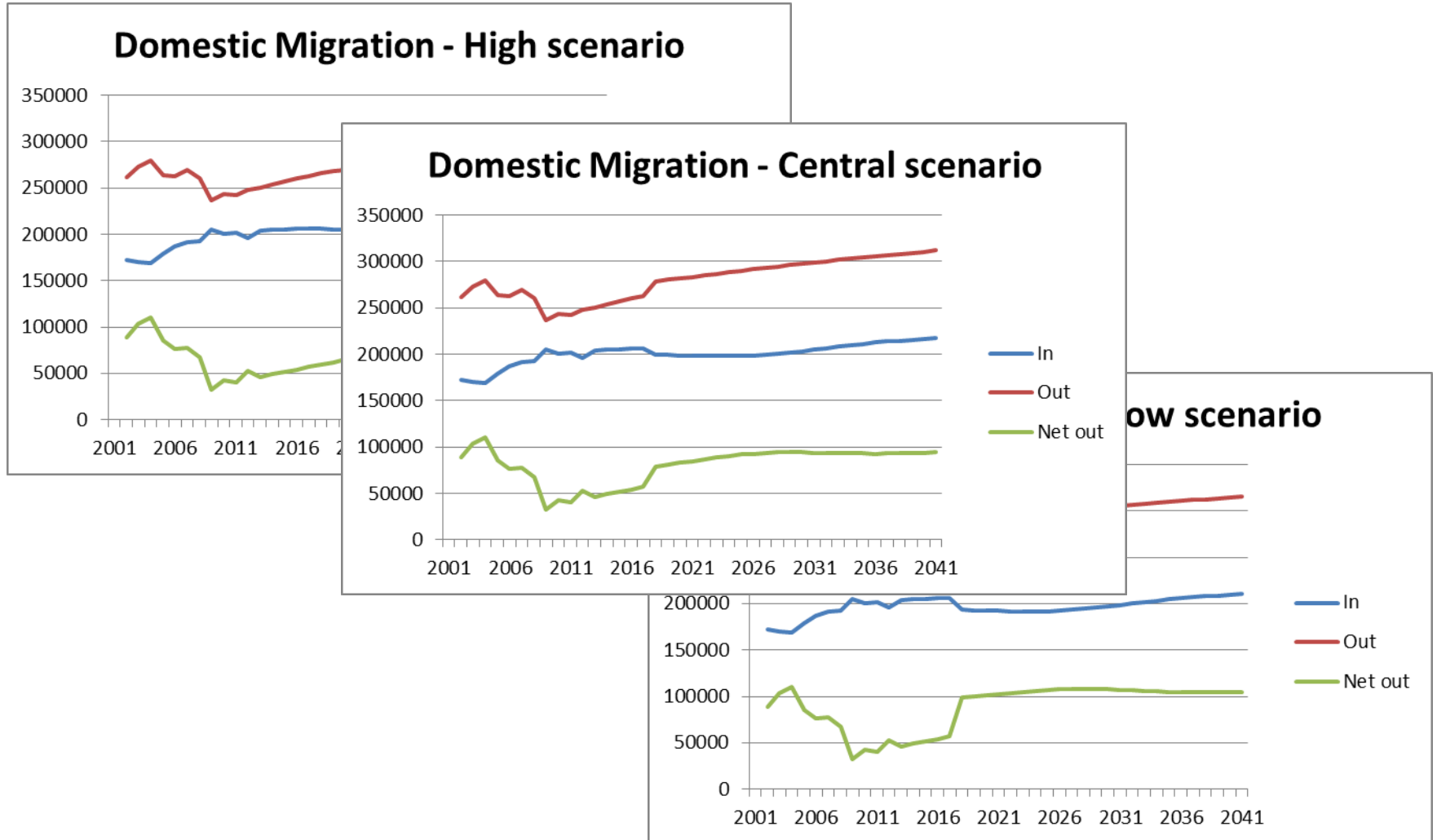
Projection scenarios

- Based around an hypothetical post-2017 economic recovery and effect on domestic migration
 - High – migration propensities based on recent 4 year patterns for duration
 - Low – after 2017, out-migration increases by 10%, in-migration falls by 6%
 - Central – after 2017, out-migration increases by 5%, in-migration falls by 3%

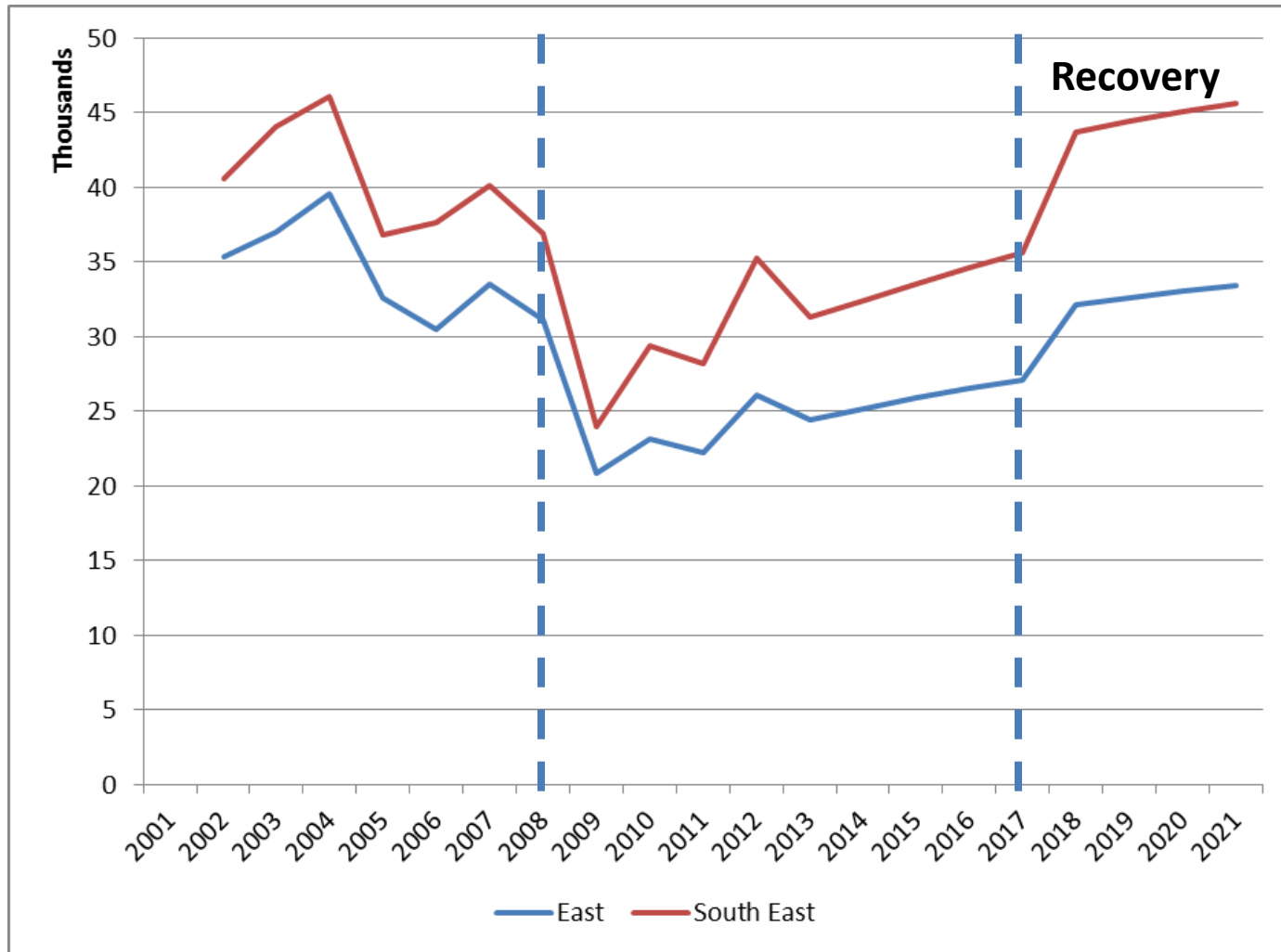
Projection scenarios



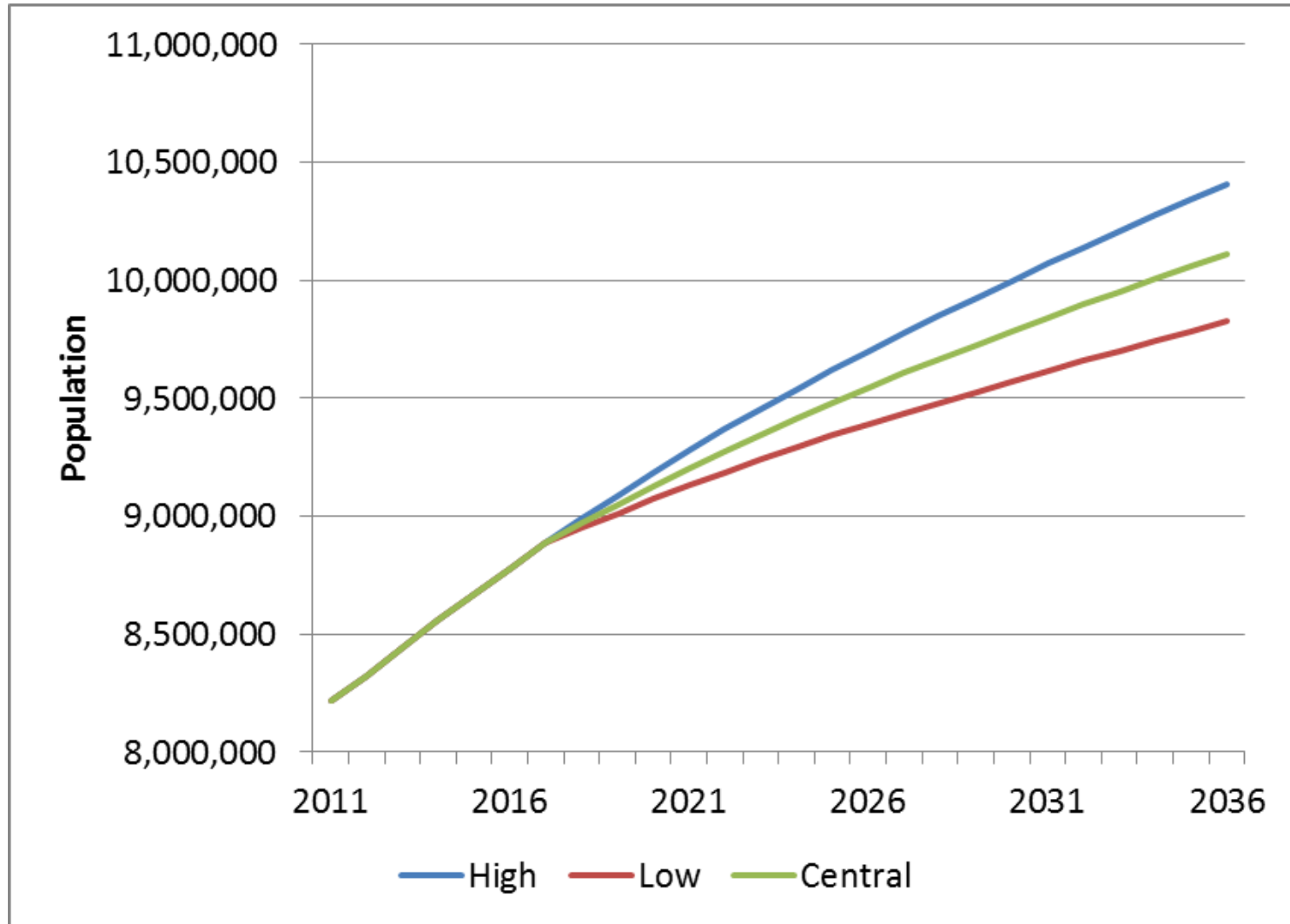
Projection scenarios



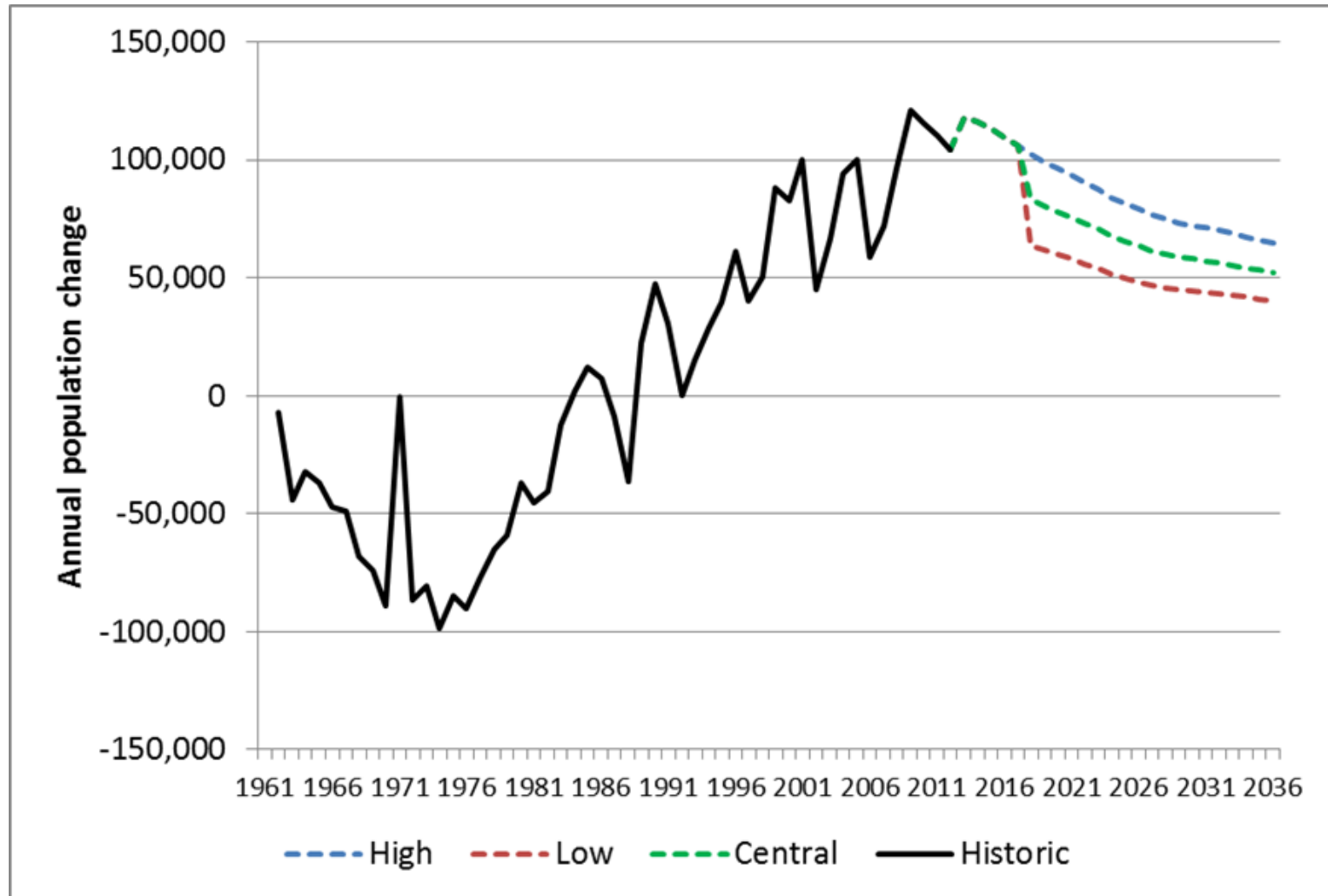
Net outmigration to wider South-East - Central scenario



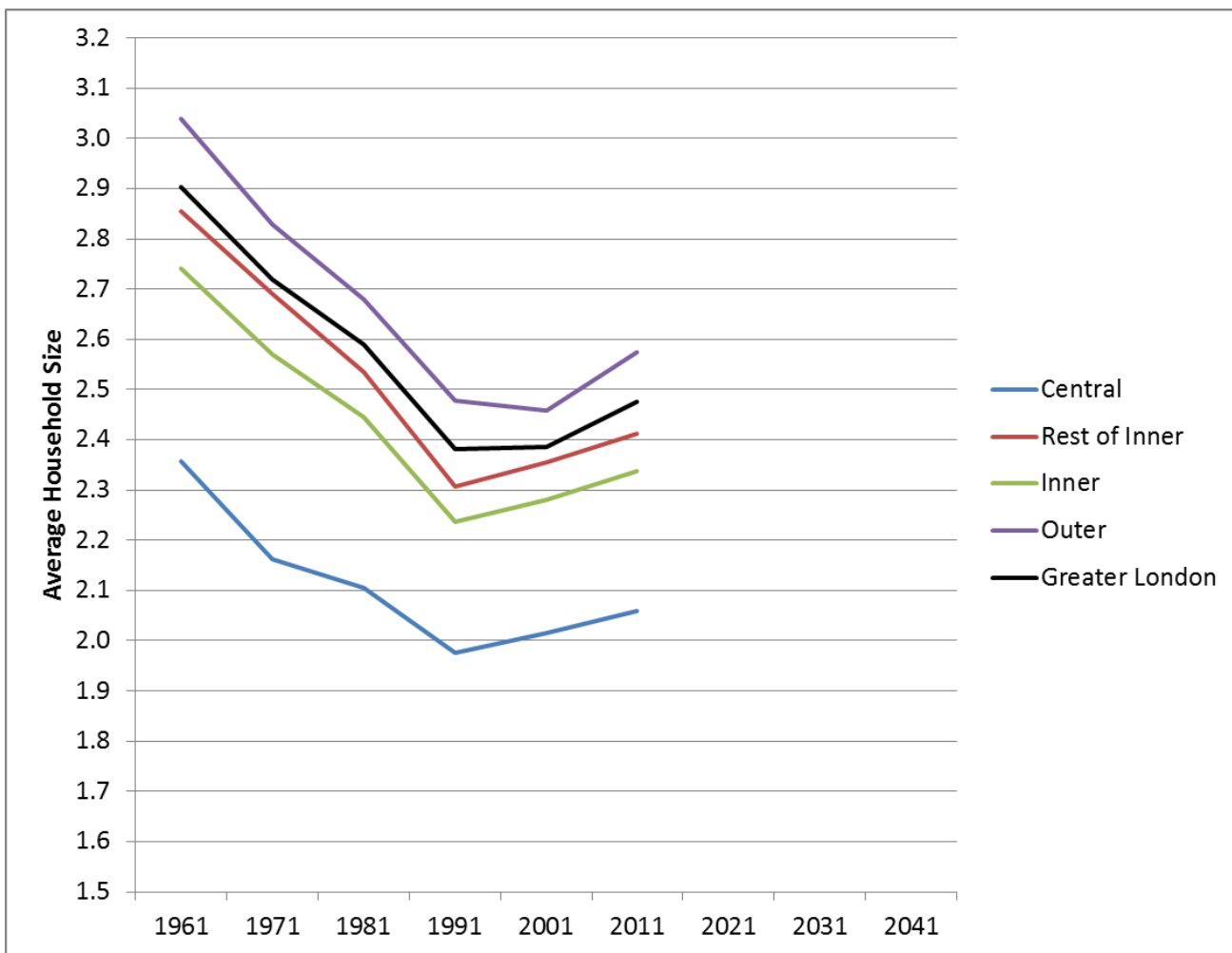
Projection results



Projected growth in historic context

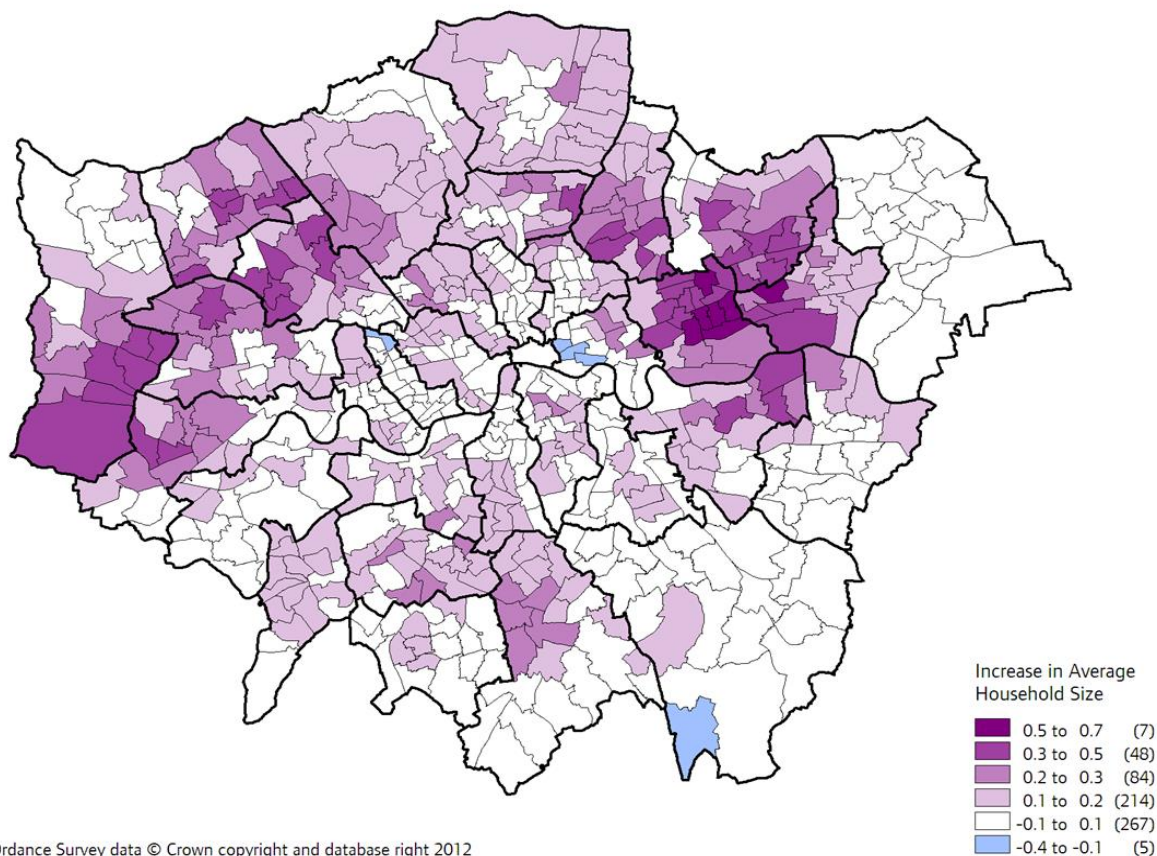


Household size - historic trends



Household size - historic trends

Change in Average Household Size of London wards between 2001 Census and 2011 Census



Contains Ordnance Survey data © Crown copyright and database right 2012

Household model

- Use DCLG Household Representative rates extrapolated to 2036

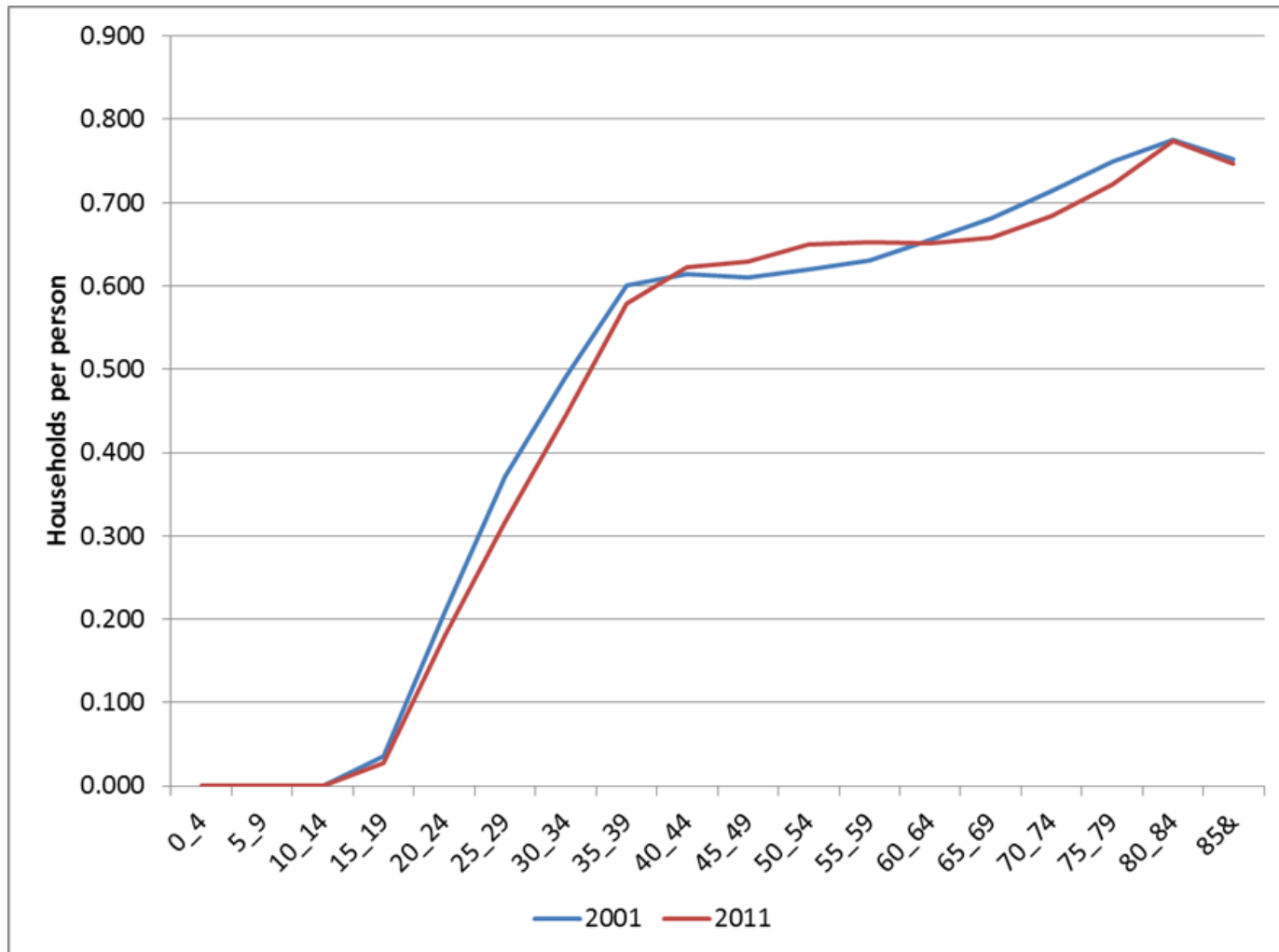
Drivers of household growth

- Growing population
- Household formation patterns
 - Extrapolated from past census data
- Age structure

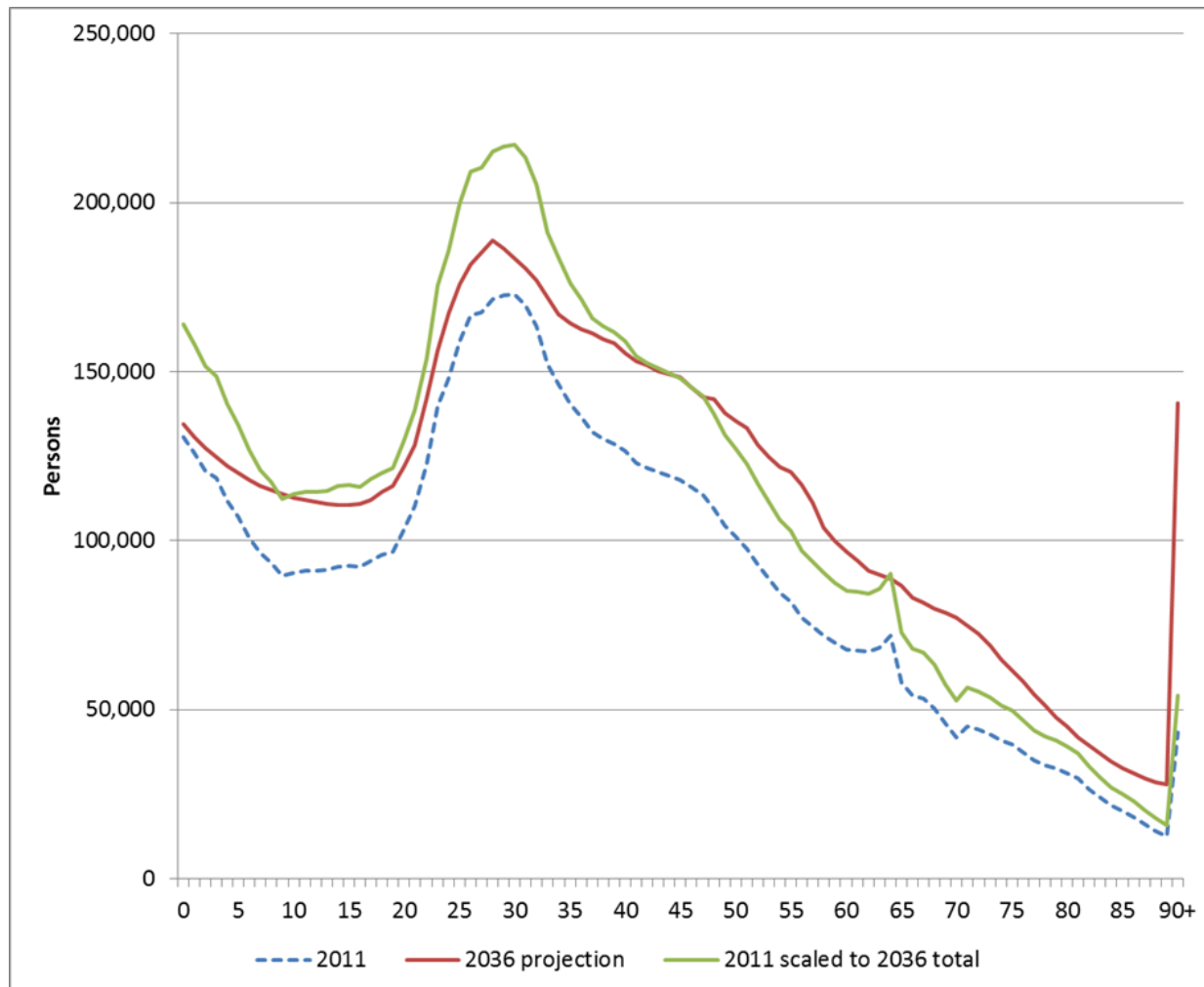
Impact of ageing population

- Higher proportions of older people give rise to smaller household sizes
- Projected fall after 2011 results from changing age structure
 - Baby boomers hit 65 after 2011 census
- Projected impact of ageing ~12.5k households per annum to 2036

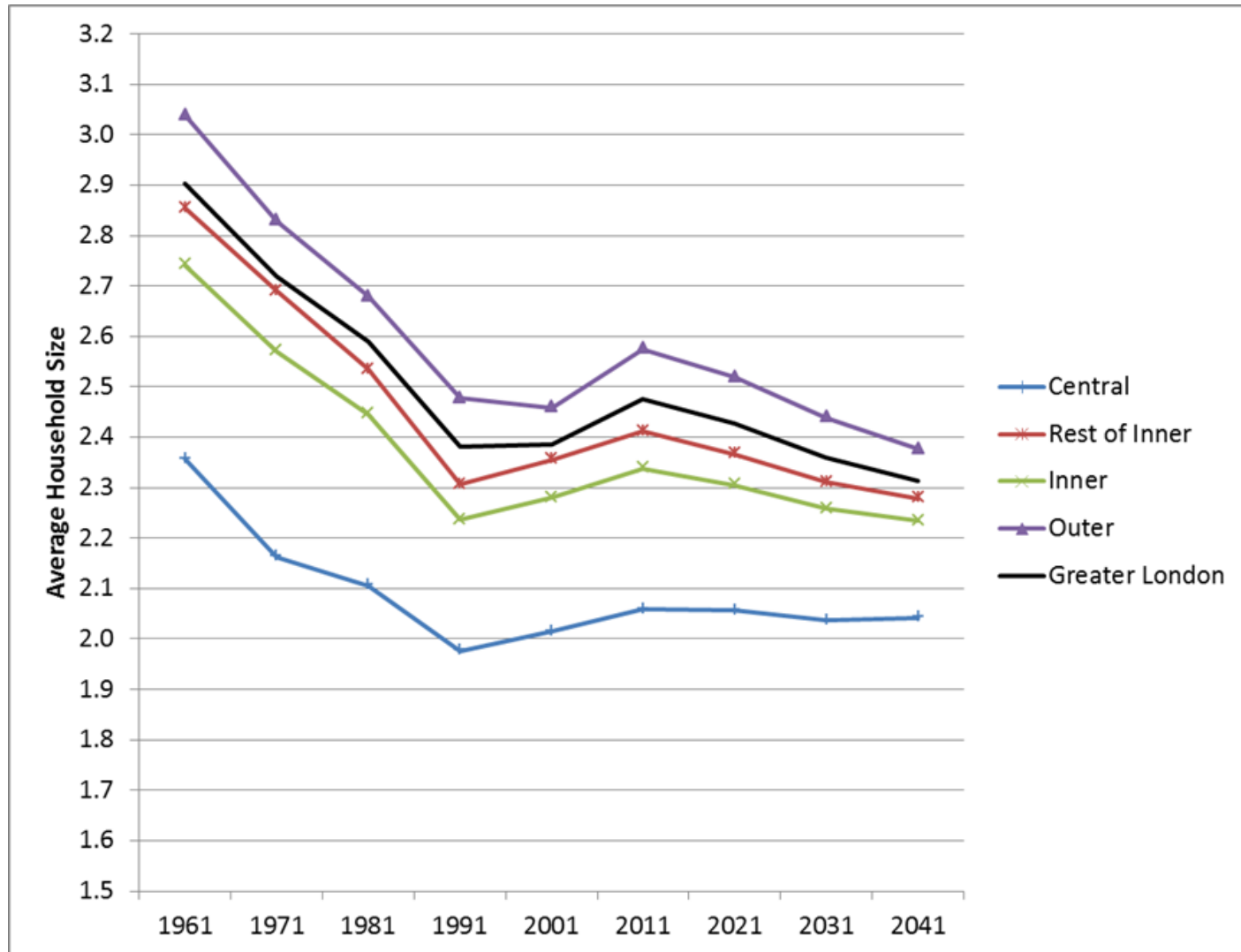
Headship rates rise with age



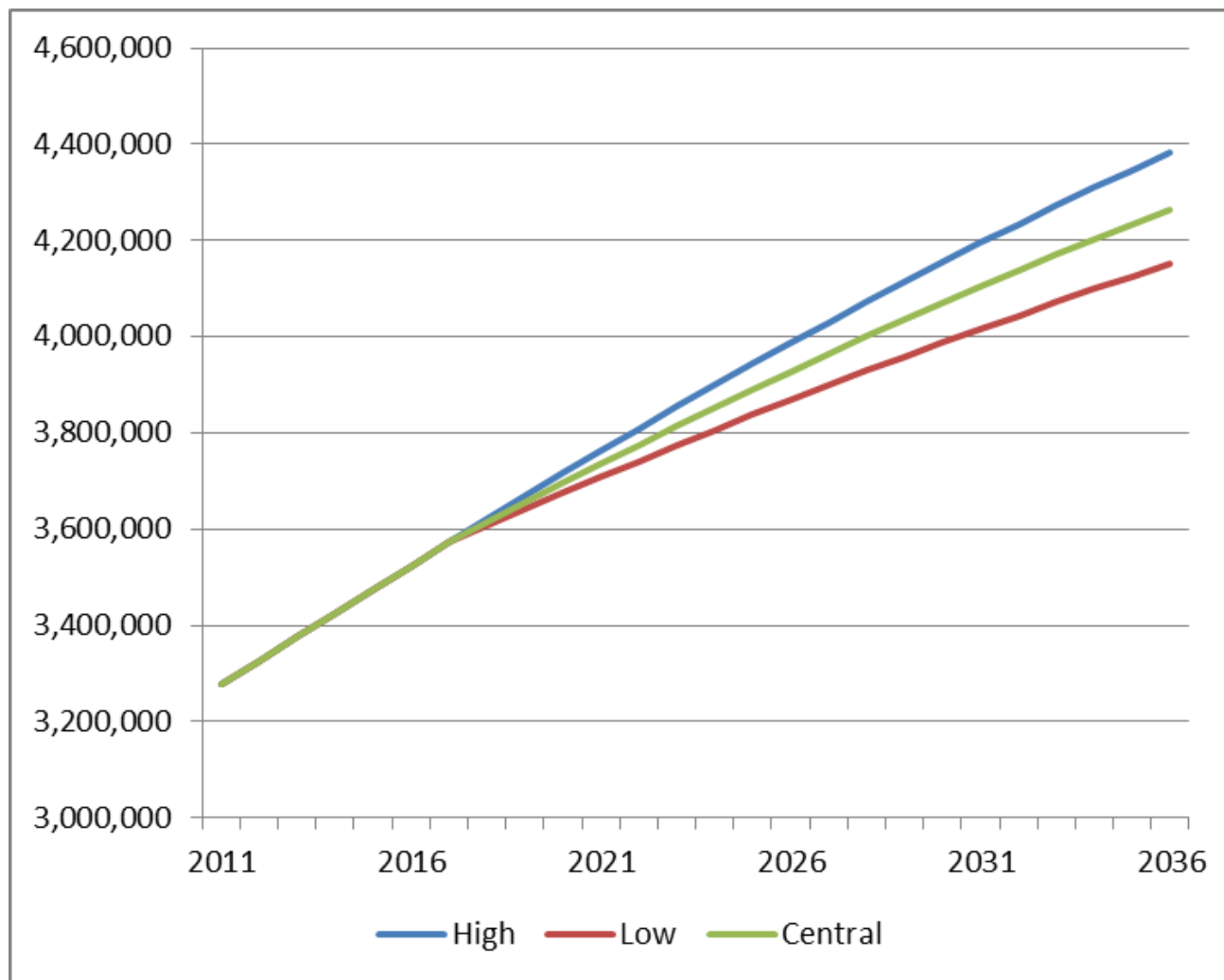
Projected change in age structure



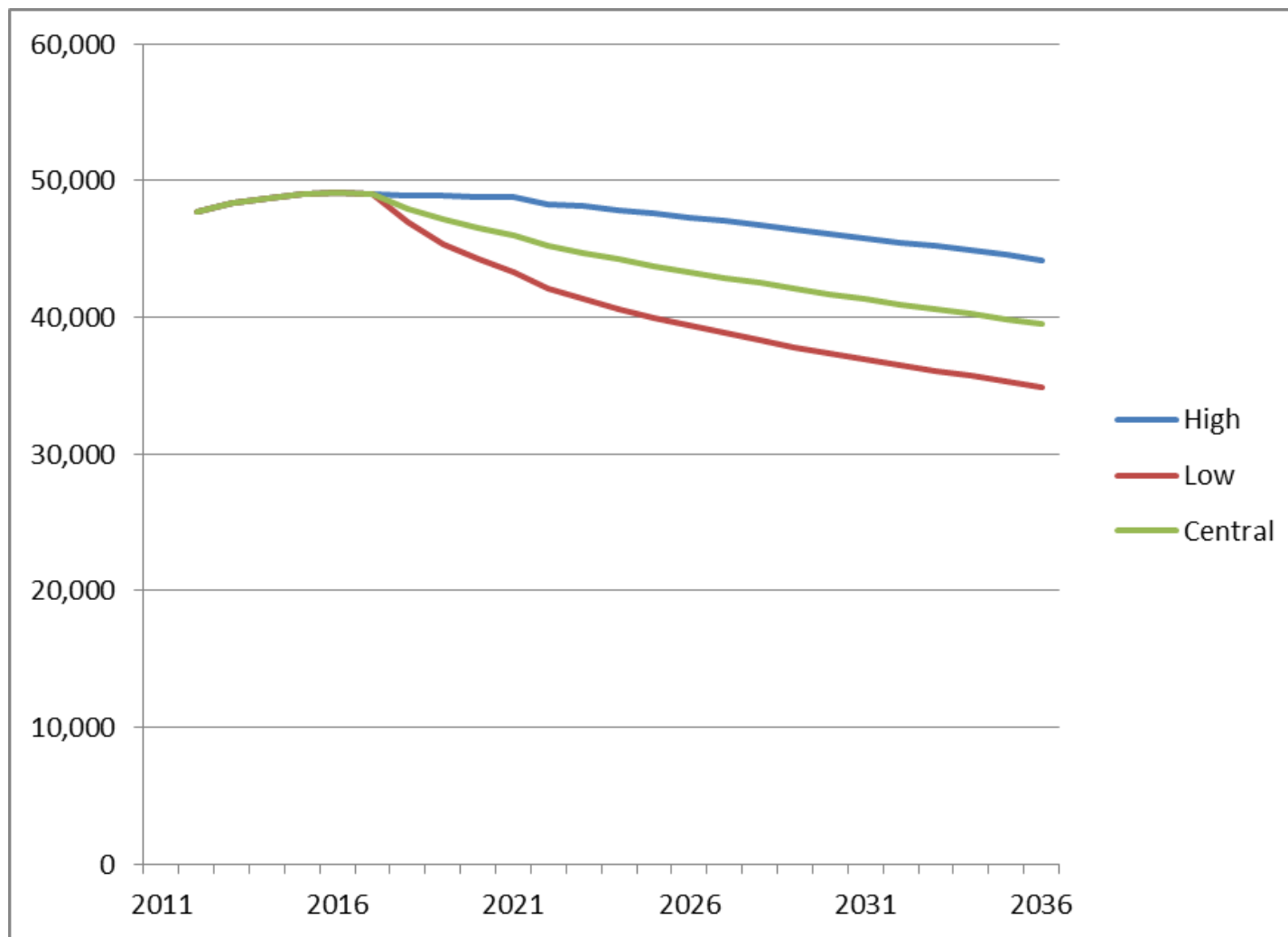
Household size – projected trends



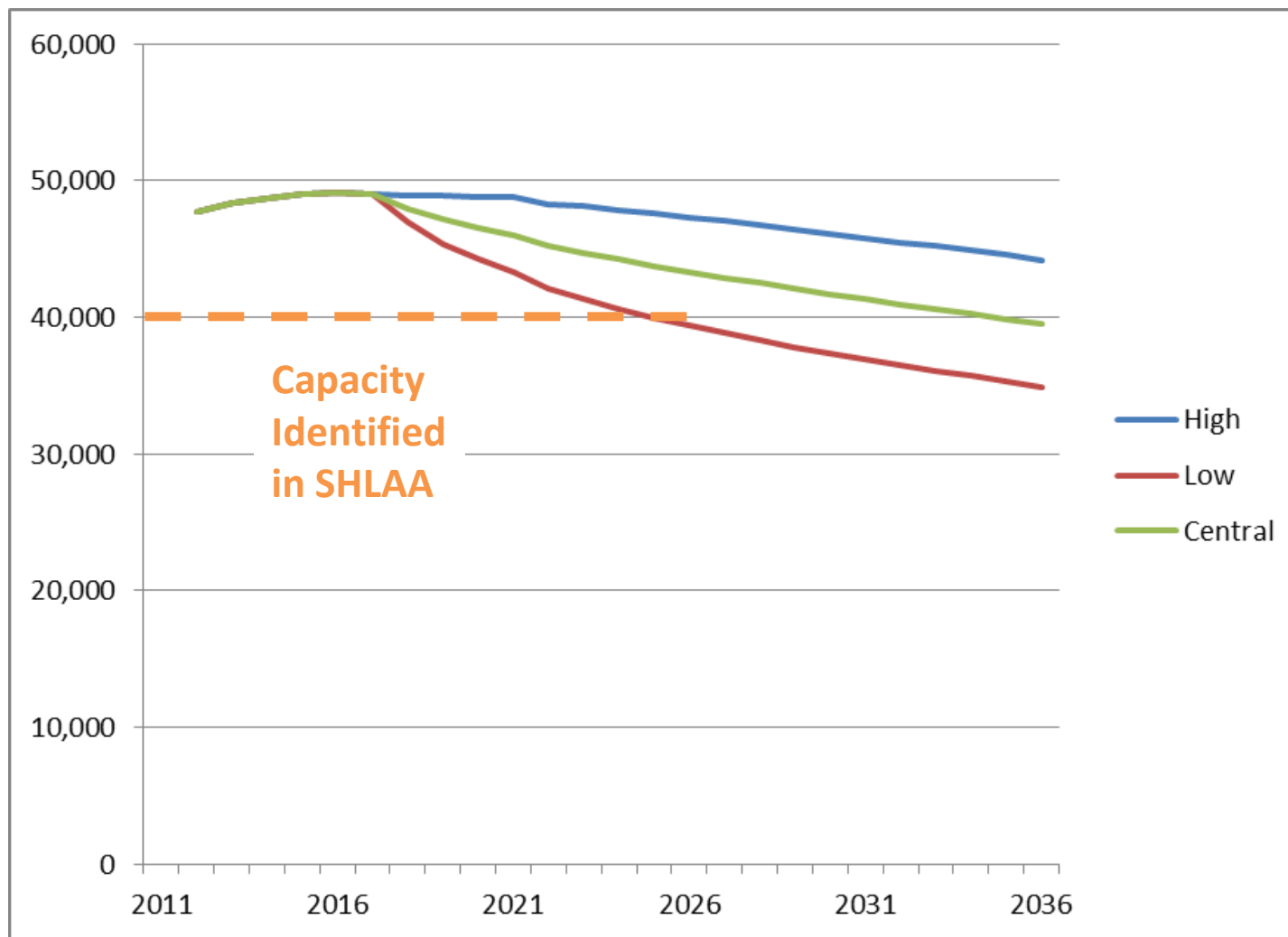
Household projections - results



Annualised household growth



Annualised household growth



Contact

Ben Corr

ben.corr@london.gov.uk