



2026

Development Strategy Final Proposals October 2010

Background Paper 1: Demography

Table of Contents

| | |
|---|----|
| Executive Summary | 5 |
| 2026 Development Strategy Final Proposals September 2010- Background paper 1: Demography | 7 |
| Introduction: The importance of having sound population projections for Ealing | 7 |
| 1. An Assessment of the Accuracy of the Methodology used to calculate Ealing’s official statistics | 7 |
| 1.1 ONS Estimates and Projections | 8 |
| 1.2 GLA Population Projections | 8 |
| 1.3 Ealing’s administrative datasets | 9 |
| Council Tax | 9 |
| GP registrations, NINO registrations and School Census | 10 |
| 1.4 How Ealing has worked to improve population datasets | 11 |
| 2. Ealing’s 2009 Special Projections | 11 |
| 2.1 Household Figures | 11 |
| 2.2 Population Figures | 15 |
| 2.3 Future planned improvements to Ealing’s population projections and datasets | 18 |
| Conclusion | 19 |

Table of Figures

| | |
|---|----|
| Figure 1. 2008 Round GLA household projections compared with Council tax payments, 2001-2009 | 10 |
| Figure 2. Household projections for Ealing Borough 2001-2031 | 12 |
| Figure 3. Household projections for Ealing Borough 2001-2031 | 13 |
| Figure 4. Additional Households 2011-2026 | 14 |
| Figure 5. Population projections for Ealing Borough 2001-2031 | 15 |
| Figure 6. Population projections for Ealing Borough 2001-2031 | 16 |
| Figure 7. Additional Population 2011-2026 | 17 |

Executive Summary

There are clear discrepancies between official population figures and the more reliable administrative data held by the council. The Council has been working to improve the quality of our local information and has worked with other agencies to prepare its own special projections for the number of households and the population of the borough.

This paper explains the importance of having accurate demographic projections, how our special projections compare with the GLA and ONS datasets and outlines further planned improvements we are making.

We currently estimate the number of households to be 127,400 and this will increase to 142,500 by 2026 (11.8%). We currently estimate the population of the borough to be 321,100 and this will increase to 347,000 by 2026 (7.4%).

2026 Development Strategy Initial Proposals September 2010

Background paper 1: Demography

Introduction: The importance of having sound population projections for Ealing

Accurate population statistics and a sound address register are key to infrastructure and services planning. They are also a key component of per capita grant funding. We estimate that undercounting Ealing's population by just 1,000 people can cost Ealing's public services more than £2.2 million each year. Population statistics from the Office for National Statistics (ONS) are also used to calculate service performance for local residents, and determine the success of policies. They are also essential to undertaking wide-ranging consultation and communicating with residents, particularly in view of the upcoming 2011 Census.¹ It is believed that Official statistics for the borough of Ealing seriously underestimate population size and particularly the size of the migrant population. As a result, Ealing Council has produced Ealing's Special Population Projections taking into account in-house datasets, surveys and work undertaken in liaison with the Greater London Authority (GLA). A minimum of 13,000 household may not receive the Census 2011 questionnaire if further research is not undertaken. This paper sets out the main issues with regards to the GLA's population projections and other population datasets and what Ealing Council has been and is doing in order to improve the accuracy of its population projections. Planning Services, as well as other services from Ealing Council will use Ealing's Special Population Projections as the evidence base for their projects, policies and strategies.

1. An Assessment of the Accuracy of the Methodology used to Calculate Ealing's official statistics

Both population projections and estimates from the Office for National Statistics and population projections from the Greater London Authority (GLA) underestimate the size of the migrant population in the Borough.

¹ 2026 Development Strategy Initial Proposals September 2009 Background paper 1: Population and Household Projections Summary, accessible at [http://www.ealing.gov.uk/ealing3/export/sites/ealingweb/services/environment/planning/planning_policy/local_development_framework/consultation/_docs/Paper1PopulationandHouseholdProjections_Sept09.pdf], accessed May 12 2010

1.1 ONS Estimates and Projections

The ONS provides local authorities with official Mid Year Estimates (MYE) and Sub National Population Projections (SNPP). The Latest Estimates are from 2009² and the Latest Projections were published in May 2010. The SNPP are based on the 2008-based National Population Projections for England published by the ONS in October 2009³.

Estimates and projections take birth and death records into account. They also try to reflect the impact of national migration on population using local GP records. International migration is factored in based on the International Passenger Survey (IPS) and the Annual Population Survey (APS). The IPS and the APS however cannot robustly address international migration at the local level. The methodology has not allowed for changes in trends and policies at the local level since 2001.

1.2 GLA Population Projections

The GLA also provides London boroughs with projections, which the boroughs are expected to use for planning purposes. These are based on the ONS Mid Year population estimates, development plans and other data (such as fertility rate, household size and average housing targets). GLA projections are based on the ONS estimates that are deficient in terms of estimating the size of the migrant population at the local level. They are therefore also unable to reflect the number of international migrants in the borough.

The latest GLA projections are the 2009 Round Demographic Projections for the London Plan (revised)⁴ and the 2009 Round Population Projections using the SHLAA⁵ which use the same methodology but integrate figures from the Strategic Housing Land Availability Assessment (both published in August 2010). The GLA 2009 SHLAA Figures take into account the gross number of residential units planned per five year periods in London Boroughs through the SHLAA whereas Revised 2009 GLA figures consider the yearly average number of new dwellings planned through the SHLAA in London Boroughs, but with a discount. The

² ONS (2010), Mid Year Population Estimates 2009: 24/06/10, accessible from [http://www.statistics.gov.uk/statbase/product.asp?vlnk=15106], accessed July 20 2010

³ ONS (2010), ONS 2008-based SNPP datasets (tables 2a, 2b, 2c and 2d), accessible at [http://www.statistics.gov.uk/statbase/product.asp?vlnk=997], accessed 20 August 2010

⁴ GLA (2010), GLA Population Projections 2009 Round (revised), London Plan, Borough SYA accessible at [http://data.london.gov.uk/datastore/package/gla-population-projections-2009-round-revised-london-plan-borough-sya], accessed 20 August 2010

⁵ GLA (2010), GLA Ward level Population Projections 2009 Round Revised, SHLAA, Borough SYA, accessible at [<http://data.london.gov.uk/datastore/package/gla-population-projections-2009-round-revised-shlaa-borough-sya>], accessed 20 August 2010

Revised Projections therefore effectively factor in the GLA's housing target for boroughs. For both these projections, figures are the same up to 2011. 2009 SHLAA projections are then generally higher up to at least 2021 because the SHLAA makes provision for most housing in the latest periods of the plan.

Ealing's own administrative datasets (listed below) show that Ealing's population is seriously undercounted and confirm that the borough has one of the highest migrant flows in London and in the country.

1.3. Ealing's administrative datasets

Council Tax

ONS estimates of number of households have been compared with the number of council tax paying households. The number of households paying council tax in 2001 was approximately 1,400 higher than which the 2011 Census recorded (and not every household needs to pay council tax).

The number of households paying council tax in 2010 in Ealing is 3,000 higher than the total number of households estimated by the latest GLA 2009 Round demographic projections for the London Plan (revised) and the 2009 Round Demographic Projections using the SHLAA (published August 2010). Furthermore, even though the true number of HMOs (Households in Multiple Occupation)⁶ in Ealing is presently unknown, Ealing's Regulatory Services know of approximately 12,000 households living in HMOs and conservatively estimate that an additional 1,000 households may be living in illegal outhouses.

⁶ These are made of independent studios and bedsits sharing a kitchen, a bathroom or toilets but are accounted for on council records by a single council tax payment.

Figure 1. 2008 Round GLA household projections compared with Council tax payments, 2001-2010

| Year | 2001 | 2006 | 2007 | 2008 | 2009 | 2010 |
|--|---------|---------|---------|---------|---------|---------|
| GLA 2009 Round Revised projections for the London Plan / GLA 2009 Round SHLAA | 118,100 | 121,500 | 122,000 | 123,100 | 123,900 | 124,400 |
| Council Tax Payments | 119,445 | 122,503 | 214,119 | 125,356 | 126,417 | 127,400 |

GP registrations, NINO registrations and School Census

Although all international migrants do not register with a GP, Ealing surgeries have recorded 8,000 more migrants than the 2008 ONS population estimates for the borough since 2001. Because GPs patient lists are often inaccurate and may not be updated, they can account for international in-migration but not for international out-migration at the local level.

A 2007 survey⁷ indicated that 85% of the borough's population is registered with a GP which can help accurately gauge the population shortfall in official estimates. 2005/2006 National Insurance Number (NINO) registrations further show some 4,500 new migrants, without taking dependents into account. Again, whilst this gives an indication as to the number of migrants living in the borough who are registering for work, NINO registrations cannot measure international out-migration at the local level.

⁷ Ealing Communities Survey (Research & Consultation team, Ealing Council, 2007)

The previous set of ONS Mid Year Estimates compared to the resident 5 to 15 population enrolled in State schools in Ealing showed that the 5 to 15 population was underestimated by at least 2,400 people. A new estimate of the shortfall will be made once ONS publish statistics by Single Year of Age (SYA).

1.4 How Ealing has worked to improve population datasets

Ealing has worked with the ONS, the GLA and other London Boroughs to investigate the potential use of administrative and survey-based data that is more accurate than official estimates and projections. In 2007, a survey provided a good estimate of the proportion of residents not registered with a local GP.⁸ Births of overseas nationals, the number of overseas-national schoolchildren and the number of overseas residents registering for National Insurance Numbers, and an estimate of their dependents were also cross-examined. This work is currently being updated. The 2007 Ealing Communities Survey showed the proportion of long, medium and short-term international migrants to Ealing. Migration data has been collected by different services to complement that information since 2007.

2. Ealing's 2009 Special Projections

2.1. Household Figures

Until all this information can be modelled into a comprehensive population estimate, the latest and most accurate population figures for the borough are Ealing's November 2009 Special Projections that were worked in partnership with the GLA. These are based on Council Tax information gathered between 2001 and 2009 and also include revised actual and planned development data for the time period 2001 to 2031. They do not however represent any people/households that do not pay Council Tax. In 2009, at least 13,000 households were excluded from the special population projections for this reason. From these figures, displayed in Figure 2 and 3, it is estimated that in Ealing, the recorded population will increase by at least 37,700 people between 2011 and 2031 (24,000 between 2011 and 2026) and that more than 15,000 new households will be formed in the time period 2011 to 2026.

⁸ Ealing Communities Survey (Research & Consultation team, Ealing Council, 2007)

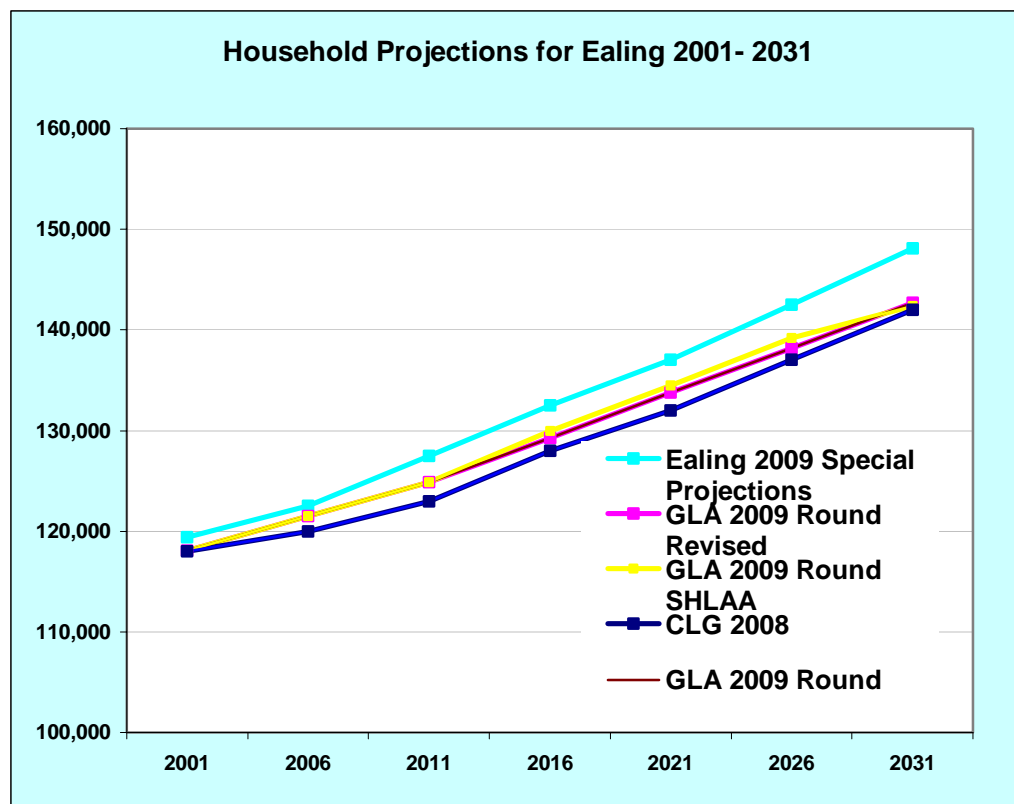
Figure 2. Household projections for Ealing Borough 2001-2031

| Year | CLG 2008 ⁹ | GLA 2009 Round Revised | GLA 2009 Round SHLAA | Ealing 2009 Special Projections |
|------|-----------------------|------------------------|----------------------|---------------------------------|
| 2001 | 118,000 | 118,100 | 118,100 | 119,400 |
| 2006 | 120,000 | 121,500 | 121,500 | 122,500 |
| 2010 | N/A | 124,400 | 124,400 | 127,000 |
| 2011 | 123,000 | 124,900 | 124,900 | 127,500 |
| 2016 | 128,000 | 129,300 | 130,000 | 132,500 |
| 2021 | 132,000 | 133,800 | 134,500 | 137,000 |
| 2026 | 137,000 | 138,200 | 139,200 | 142,500 |
| 2031 | 142,000 | 142,700 | 142,400 | 148,100 |

Figure 2 shows how the estimated and projected figures for households in the 2008 Community and Local Government's (CLG) dataset, the two 2009 GLA's datasets and the Ealing Special Projections' dataset vary between 2011 and 2031. Estimates for 2010 are highlighted in yellow. Figure 1 displays the same information in a graph.

⁹ CLG (2008), *Table 406: Household Estimates and Projections, By District, 1981-1931*, accessible at [http://www.communities.gov.uk/housing/housingresearch/housingstatistics/housingstatisticsby/householdestimates/livatables-households/], accessed May 12 2010

Figure 3



It is evident from Figures 2 and 3 that Ealing's 2009 Special Projections steadily assume a higher number of households in the borough from 2011 to 2026 than the CLG's 2008 projections and the GLA's 2009 rounds of projections.

Ealing's Special Projections estimate that in 2011 there will be 2,600 more households in the borough than the two rounds of GLA 2009 population projections expect.

In addition, CLG projections predict that there will be an 11.4% increase in the number of households between 2011 and 2026, 2009 GLA revised figures a 10.6% increase, 2009 GLA SHLAA figures an 11.4% increase and Ealing's Special Projections an 11.8% increase.

Ealing's Special Projections, at 15,000 households, expect 700 more households to form in the borough between 2011 and 2026 than estimated by the 2009 GLA SHLAA projections but 1,700 more than showed by the 2009 Revised GLA projections. This is shown in Figure 4 below.

Figure 4. Additional Households 2011-2026

| | GLA 2009 Round Revised | GLA 2009 Round SHLAA | Ealing 2009 Special Projections |
|--|-------------------------------|-----------------------------|--|
| Additional Number of Households 2011-2026 | 13,300 | 14,300 | 15,000 |
| Percentage change | +10.6% | +11.4% | +11.8% |

2.2 Population Figures

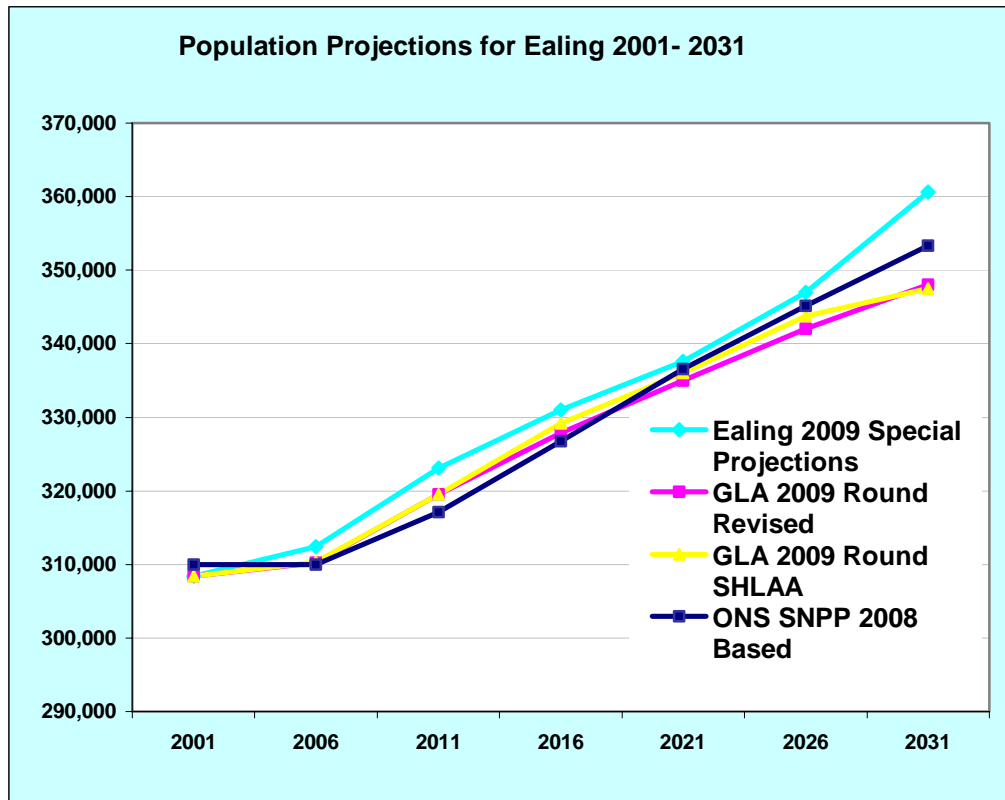
Figure 5 shows how estimated and projected population levels vary in the ONS's Sub National Population Projections 2008 based dataset, the two rounds of 2009 GLA projections and Ealing Special Population Projections between 2001 and 2031. Estimates for 2010 are highlighted in yellow. Figure 6 displays the same information in a graph.

2009 Mid Year Estimates from the Office for National Statistics estimate Ealing's population to be 316,600. Figure 5 shows that the ONS 2008-based SNPP estimate population to be 315,200 and the GLA 2009 Round Projections to be 318,200 in 2010. Ealing's Special Projections however approximate population to include from 3,900 to 6,900 additional residents in 2010 compared to these datasets and show the figure of 322,100 residents for 2010.

Figure 5. Population projections for Ealing Borough 2001-2031

| Year | ONS SNPP 2008 Based | GLA 2009 Round Projections Revised | GLA 2009 Round Projections SHLAA | Ealing 2009 Special Projections |
|------|---------------------|------------------------------------|----------------------------------|---------------------------------|
| 2001 | 310,000 | 308,400 | 308,400 | 308,400 |
| 2006 | 310,000 | 310,300 | 310,300 | 312,400 |
| 2010 | 315,200 | 318,200 | 318,200 | 322,100 |
| 2011 | 317,100 | 319,500 | 319,500 | 323,100 |
| 2016 | 326,700 | 327,800 | 329,200 | 331,000 |
| 2021 | 336,600 | 335,100 | 336,000 | 337,600 |
| 2026 | 345,200 | 342,000 | 343,800 | 347,000 |
| 2031 | 353,300 | 348,000 | 347,500 | 360,600 |

Figure 6.



Figures 5 and 6 show that Ealing's Special Projections demonstrate a significantly higher population in the borough between 2006 and 2021 than both of the 2009 GLA's round of projections and the ONS SNPP 2008-based projections. The difference is particularly significant up to 2021 where projections tend to converge.

In addition, ONS 2008-based population projections estimate there will be an 8.9% increase in Ealing's population between 2011 and 2026, 2009 GLA Revised and SHLAA a 7% increase, and Ealing Special Projections a 7.4% increase. This is shown in Figure 7 below.

Figure 7. Additional Population 2011-2026

| | ONS SNPP 2008 Based | GLA Round Projections Revised | GLA Round Projections SHLAA | Ealing 2009 Special Projections |
|---|--------------------------------|--|--|--|
| Total Additional Population 2011- 2026 | 28,100 | 22,500 | 24,300 | 23,900 |
| Percentage Change | +8.9% | +7% | +7% | +7.4% |

Ealing's Special Projections estimate that in 2011, there will be 2,600 more households in the borough than estimated by the two rounds of GLA 2009 population projections. The Projections also predict the highest increase (11.8%) in the number of households in Ealing between 2011 and 2026 as compared to figures from the Department of Communities and Local Government (DCLG) and the GL

In terms of population, 2009 Mid Year Estimates from the ONS estimate Ealing's population at 316,600 in 2009. The ONS 2008-based Sub National Population Projections estimate the population to be 315,200 in 2010. The two rounds of 2009 GLA projections put Ealing's population at 318,000. Ealing's Special Projections however estimate the population to be 321,100 in 2010.

2.3. Future planned improvements to Ealing's population projections and datasets

Ealing aims to create a single integrated database, the "Resident Index", which will bring together the main administrative datasets of population held by the Council and its partners. It will be regularly updated with current administrative records. A minimum confirmed population will be established of households appearing on more than one dataset. Further analysis can be undertaken using survey data to estimate the proportion of residents not on our administrative datasets. Frontline staff will contribute by accurately monitoring residents' postcodes, country of origin and length of stay in the UK. The next Ealing Residents survey will record the size of households so GLA estimates need not be used for this purpose.

The Council is also improving its knowledge of unregistered dwellings and its address register (the Local Land and Property Gazetteer) through site visits, aerial and on site surveys, and data matching exercises. The Local Land and Property Gazetteer (LLPG) will soon be able to record household occupancy and distinguish between commercial and residential properties. The Gazetteer might also be linked up with the UK Maps programme if purchased, which gives access to regularly updated information on the built environment (number of storeys, residential addresses etc), and with administrative datasets. This will allow regular snapshots of Ealing's properties and facilitate delivery of the 2011 Census questionnaires.

The ONS will carry out the next Census in March 2011. Having found by crossing different address datasets that Ealing has one of the highest percentage of addresses mismatches in the country, the ONS is now checking local addresses in up to 80% of Ealing's postcode areas. However, it is not yet known when the Census' final statistics will be released. Census figures will be checked against Ealing's own estimates when these are completed.

Conclusion:

There are clear discrepancies between the official population figures and more reliable administrative data held by the Council. Underestimates of Ealing's population may seriously disadvantage local residents through the Council not receiving the right amount of funding to support all borough residents, jeopardising the Council's ability to plan services, development and regeneration due to poor knowledge of basic demographic information

There are a number of steps we can take to improve the quality of our local information. The method most conducive to producing reliable results involves verification and linking of local administrative datasets. Data can be linked back to local address records providing a composite database including location, gender and age of household members, language, date of arrival in UK, benefit status and theoretically anything already contained in a comprehensive dataset. This path could enable service planning to be conducted with far greater sensitivity.

In addition to this work, it is recommended that the Council takes steps to systematically locate HMOs and illegal outhouses in the borough.

These steps will allow Ealing to plan more accurately for development and regeneration of the borough. They will also improve enumeration for the 2011 Census, with the probable result of achieving greater funding for every year between 2011 and 2021. In addition, households living in properties not recorded by our current systems might receive council communications, and be engaged in consultation and research of relevance.

In the meantime, it is advised that planners use the 2009 Ealing Special projections to plan provision and infrastructure, carefully noting their shortcomings, in particular that they account for only a quarter of houses in multiple occupation, and for none of the irregular dwellings that do not pay council tax. The Special Projections anticipate that in 2026 there will be 142,500 households, and a population of 347,000, representing a growth of 11.8% in households and 7.4% in population between 2011 and 2026.