Further Alterations to the London Plan

Consultation issues from the Wider South East

25 June 2014

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….

London's housing requirements

- CLG currently suggests c53,000 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  Outdated hhld formation rates; what happens if recent changes are cyclical/short term?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 = 49-62k pa

Bridging the London demand/supply 'gap'

- New NPPF compliant, needs driven, higher density SHLAA
  = 42k pa supply (cf 2011 Plan 32k pa)

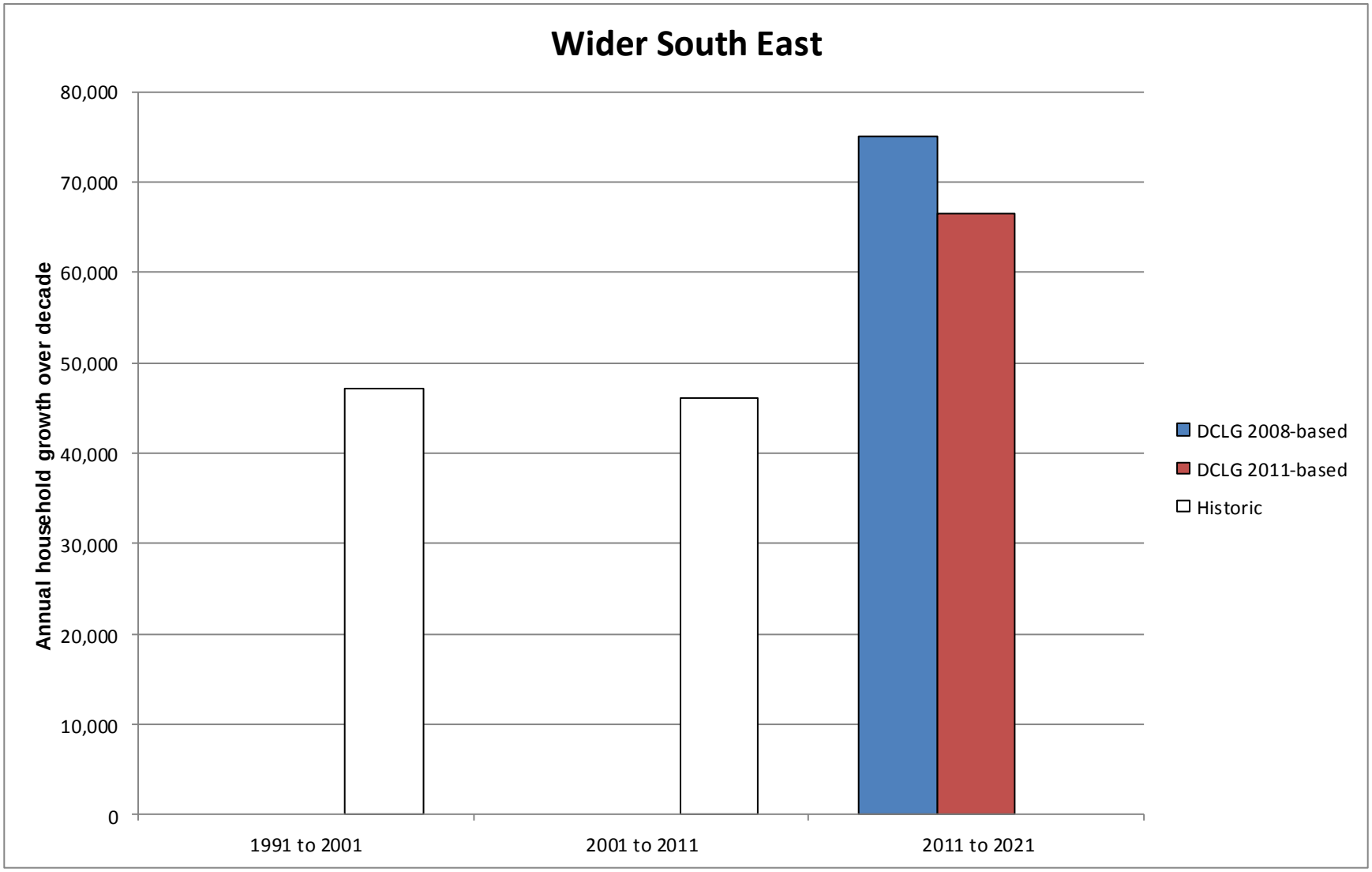
- Still leaves a 'gap': (49k/62k pa demand) – (42k pa supply)
  = -7k/-20k pa

- Bridging the gap within London: additional higher densities in:
  -Opportunity/Intensification Areas
  -Mixed use, housing led, town centre redevelopment
  -Surplus industrial land around transport nodes

- Capacity to completions: the need for realism
  -216k in the pipeline but only 25k pa completions

- Equivalent to 4.4 years supply (+ 'potential' sites + higher densities in NPPF 'broad locations') = at least 5years supply

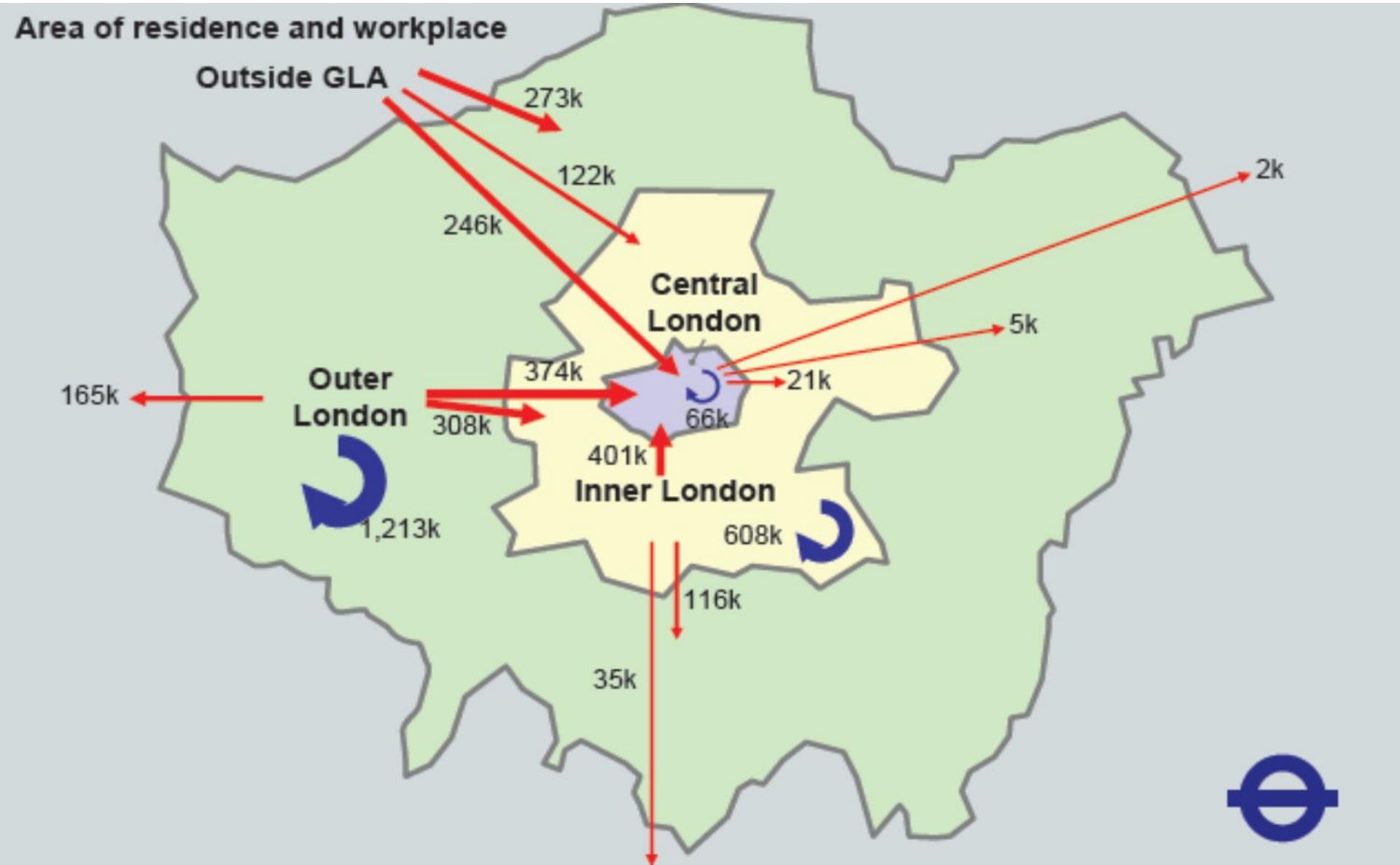
Recession reduced out-migration: impact on wider SE housing demand?



Current demand and supply in the Greater South East (CLG)

	London	**South East**	**East**
Supply (average completions 2004 – 11 pa)	24,300	29,600	21,300
Demand i (CLG 2008 hhlds pa)	37,900 ‘gap’ : -13,600	41,100 ‘gap’ : -11,500	33,900 ‘gap’ : -12,600
Demand ii (CLG 2011 hhlds pa)	52,600 ‘gap’ : -28,300	38,400 ‘gap’ : -8,800	28,100 ‘gap’ : -6,800

Commuting flows



Key consultation issues
Housing supply

- London isn't meeting its needs: *it can up to at least 49k pa and until 2025, but longer-term uncertainty over out-migration (i.e. if return to pre-recession levels or remain lower). Also delivery barriers (i.e. translating approvals into completions).*
- London won't meet its affordable housing needs (17k supply, 26k 'need'): *this is a minimum target. Key to solution is to build more homes overall.*

Key consultation issues Infrastructure / Green Belt

- FALP doesn't plan for adequate infrastructure across London / Wider SE: *but e.g. anticipating HS1 and Xrail 2. 2050 Infrastructure Plan will explore options for the longer term and a full Plan review. Also opportunities for common call on infrastructure.*
- London hasn't done a Green Belt review: *at present this isn't necessary. GLA looking at a range of different growth scenarios through 2050 Infrastructure Plan and will start a full Plan review in light of these.*

Key consultation issues Process

- The Mayor should be bound by the Duty to Cooperate: *GLA Act provides a different legislative context in respect of London Plan preparation; in practice his Duties to Consult and Inform are very similar*
- What happens if FALP is ‘unsound’? *FALP is realistic, transparent and well evidenced. Government hasn’t objected to the basic approach and the central issue of reconciling housing need and supply.*

Key consultation issues
Co-operation in practice

- Uncertainty in London planning makes planning outside London uncertain: *FALP does meet need until 2025, but under the 'Duty to Inform' it is prudent to advise of uncertainty ('Bedford Letter').*
- Better understanding of common issues:

  co-operation mechanisms established – see next slide. GLA will also assist in translating ONS 2012 population projections into households.

Planning Coordination with the Wider South East

- Mayor's discussion paper "Cross-boundary cooperation on strategic planning for London and the wider metropolitan area" - October 2012
- Stakeholder workshops - on strategic planning - March 2013
  on housing/demography - October 2013
- Strategic Spatial Planning Liaison Group established (meets quarterly)
  - officer representation from the Wider South East and London
  - has developed a housing/demography focus
- FALP consultation events for Wider South East – March/June 2014 – presentations to Planning Officer Groups across Wider South East and discussions at political level
- Waste issues separately addressed through Regional Technical Advisory Bodies

FALP timetable

- Early June Inspector's draft 'Matters'
- Wider SE event on consultation issues(25 June) and presentations to Planning Officer Groups across Wider SE
- Early July Inspector's final 'Matters' and Technical Seminar
- 1st September (3 weeks?) EIP
- Mid November 'Intend to Publish' FALP to SoS
- Early January 2015 'Intend to Publish' FALP to Assembly
- Feb/March 2015: final publication

Thoughts?

London Infrastructure Investment Plan 2050 Preview

June 2014

GREATER LONDON AUTHORITY

CONTENTS

INFRASTRUCTURE IS A KEY COMPONENT OF A CITY'S COMPETITIVENESS

The 12 pillars of competitiveness of the World Economic Forum:

1. Institutions
2. Infrastructure
3. Macroeconomic environment
4. Health and primary education
5. Higher education and training
6. Goods market efficiency
7. Labour market efficiency
8. Financial market development
9. Technological readiness
10. Market size
11. Innovation
12. Business sophistication

Competitiveness	
New York	1
London	2
Singapore	3
Hong Kong	4
Tokyo	5
Sydney	6
Paris	7
Stockholm	8
Chicago	9
Toronto	10

Source: Economist Intelligence Unit 2013

…London is a world competitive city having the ability to attract capital, businesses, talent and visitors…

Competitiveness	
London	1
New York	2
Singapore	3
Chicago	4
Paris	5
Amsterdam	6
Toronto	7
San Francisco	8
Berlin	9
Stockholm	10

Source: IBM 2013

…YET LONDON'S INFRASTRUCTURE IS NOT BEST IN CLASS

Transportation and Infrastructure	
Singapore	1
Seoul	2
Toronto	3
Tokyo	4
Hong Kong	5
Stockholm	6
New York	7
London	8
Paris	9
Berlin	10

Source: PwC 2012

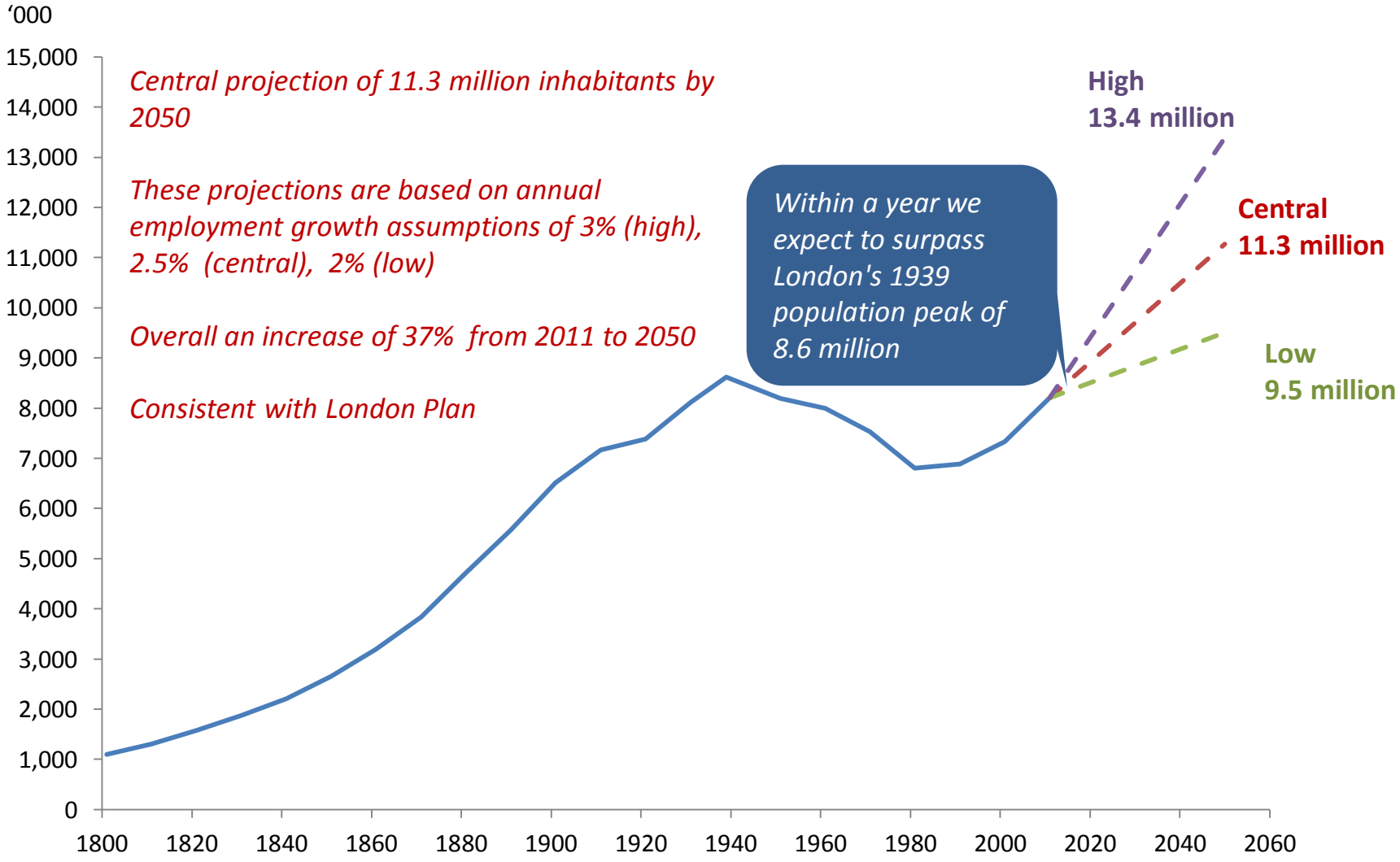
The World Economic Forum, Executive Opinion Survey (2013) finds the UK on the 28th position in terms of quality of infrastructure compared to other countries. In its own rankings, the WEF places the UK on the 8th position.

Green City Index	
Copenhagen	1
Stockholm	2
Oslo	3
Vienna	4
Amsterdam	5
Zurich	6
Helsinki	7
Berlin	8
Brussels	9
Paris	10
London	11
Madrid	12
Vilnius	13
Rome	14
Riga	15

Source: Economist Intelligence Unit 2012

UK scores 62nd out of 185 countries in the ease of securing electricity connections (World Bank 2012)

LONDON'S POPULATION IS PROJECTED TO CONTINUE GROWING



Source: GLA Intelligence Unit

INFRASTRUCTURE DEMAND TO 2050 IS HUGE

- Demand on the underground and rail are likely to go up by 60% and 80% respectively.
- An estimated 49,000 new homes a year are needed between 2020 and 2050; this equates to circa 1.5 million new homes by 2050.
- Additional school age population equivalent to an extra c 350 primary schools, 114 secondary schools, 110 sixth form colleges over the period to 2050.
- Energy demand may increase by around 17-20% by 2050. With a shift away from domestic gas to electricity (assuming climate targets are met).
- London's demand for water expected to exceed supply as early as 2016, by 10% by 2025 and 21% by 2040.

THE LIST OF NEEDS IS LONG

- Additional housing and transport throughout the South East are top priorities.
- Transport investments to support:
  - Economic growth
    - 70% increase in radial capacity requiring:
    - Tube investments - 36 trains per hour on certain lines.
    - Circa £80bn investment in rail, especially in south London, to bring it up to underground standards. Crossrail 2.
  - Housing
    - Major extensions to the rail, tube, DLR and tram networks
    - New river crossings
    - Extensive road network investment to reduce congestion
  - Quality of life
    - Ultra low emissions across London, new cycling routes, driverless vehicle technology to reduce accidents, road tunnels, more spacious trains, e.t.c.

AS WELL AS…

- Major enhancements to distribution network (40% of substations at capacity). Local energy production for resilience. Continued energy efficiency measures to manage demand. National government needs to deliver.

- For water a variety of demand and supply side measures will be required: upgrading of the water mains network; retrofitting; smart metering. Need for innovation. And a plan for drainage.

- A long term flood risk management plan is needed for each catchment area in London.

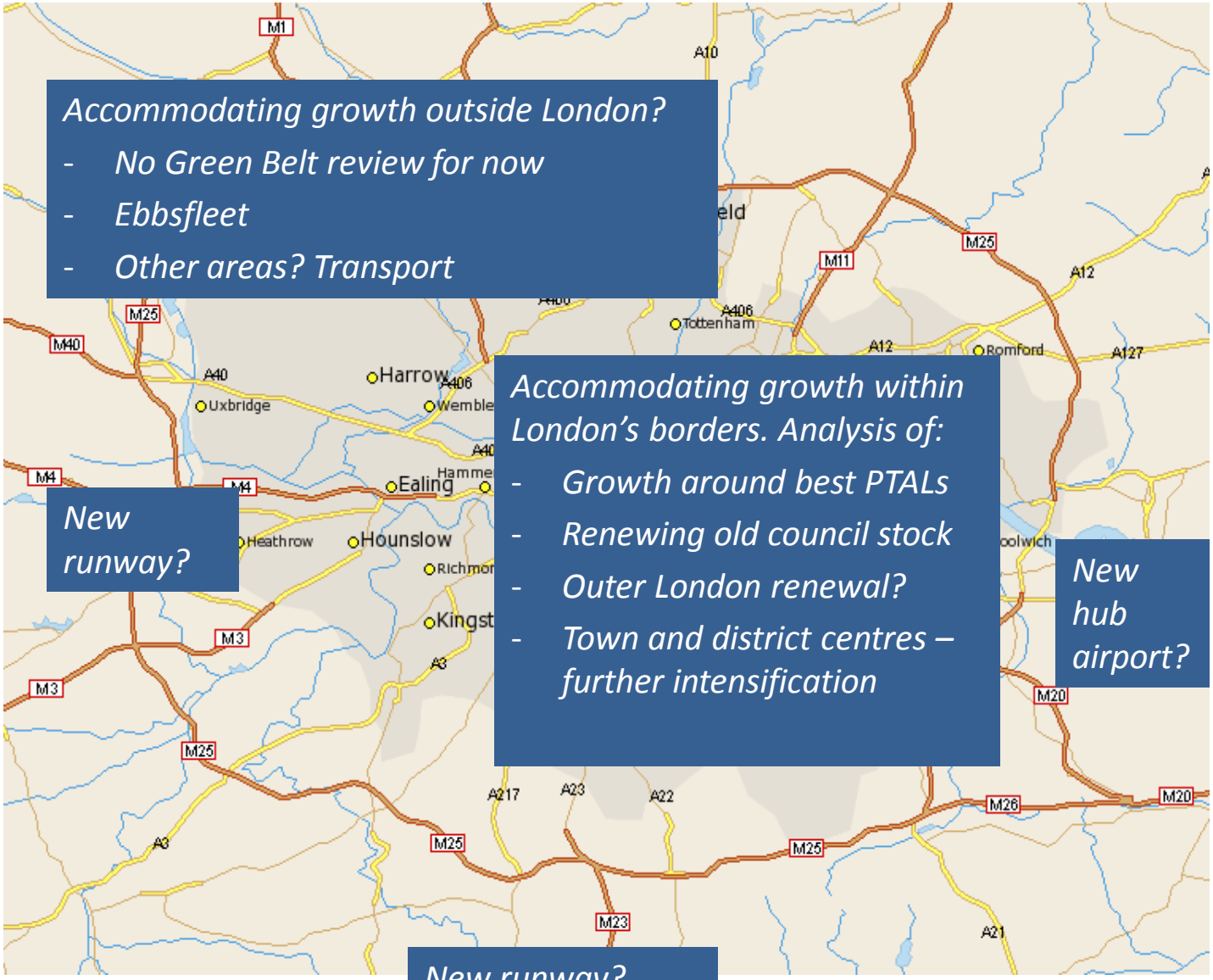
...AND

- **Greening the urban environment - to provide flood protection, shade, biodiversity, better air quality, visual impact, pedestrian and cycling routes and space for recreation; on increasing densely build on land. New taskforce.**

- **Incentives and facilities for a trend towards a more circular economy. 100 new facilities.**

- **Even after current investments in broadband, 5-10% of London may remain unconnected, options include expansion of wireless networks, 5G...**

SPATIAL IMPACTS / CHOICES



APPROACH TO INNOVATION

- We will need to make the most of technological advances - along side the various ‘vintages’ of existing infrastructure
- We need to make better use of existing technology – e.g. big data, 3D visualisation. Current LEP projects to map underground assets & better smart metering.
- We need to be ready to adopt new technology – 5G, Autonomous Vehicles. At the same time we need to be grounded in reality (‘solar roads?’)
- We will set out the key considerations for future Mayors to ensure further iterations of the IIP effectively take innovation into account.

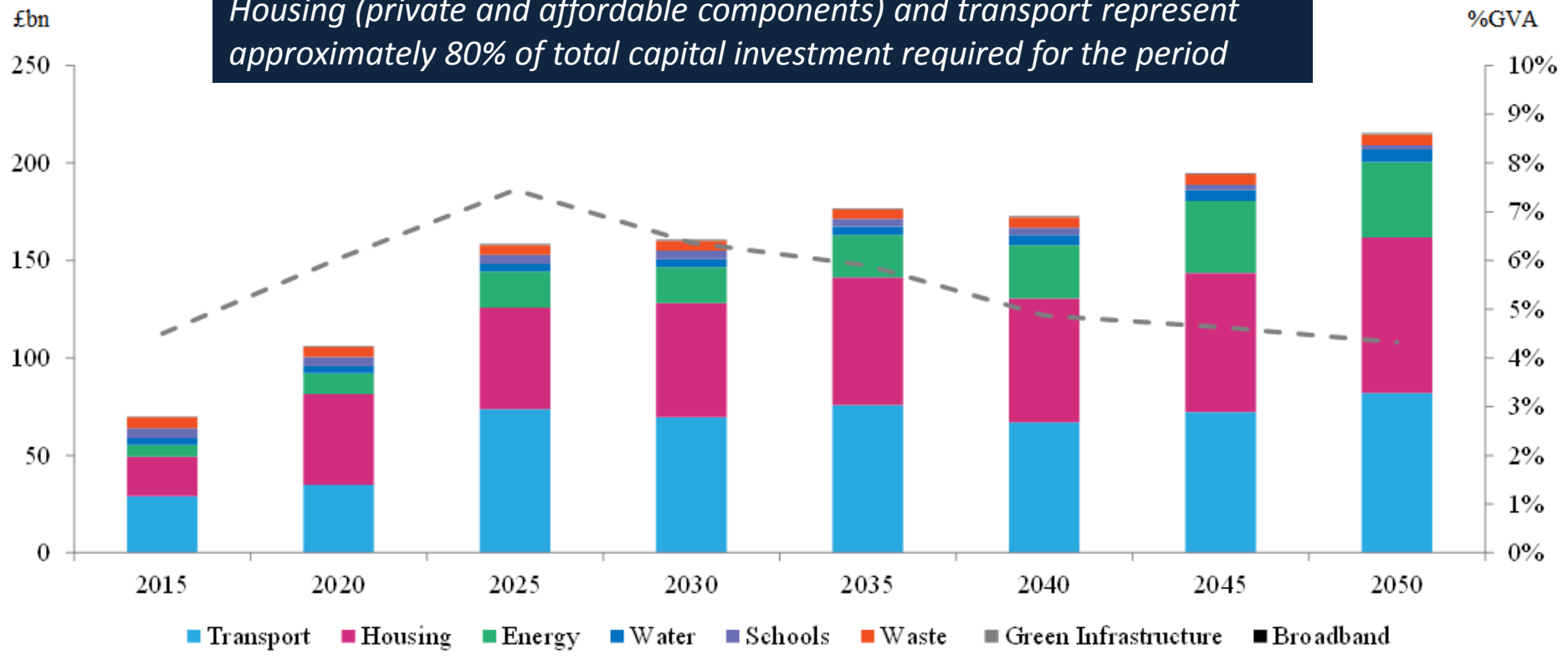
IMPROVING GOVERNANCE

- **The Mayor to convene a London Infrastructure Delivery Board, made of infrastructure providers, from all sectors, and regulators. The Group would meet regularly to lead integrated delivery in the light of London's growth. Would be supported by GLA working with 3rd parties.**

- **Cross party agreement where possible on strategic infrastructure needs**

COSTS – DOUBLING OF SPEND REQUIRED?

Housing (private and affordable components) and transport represent approximately 80% of total capital investment required for the period



Assumes: Construction sector inflation until 2050 at c.2%; GVA growth of 3.5% (real)

HOW TO REDUCE COSTS?

- **Prioritisation**
- **Integration**
- **Efficient procurement**
- **Planning ahead**

- **We will consult on where further prioritisation and cost savings could be made.**

HOW TO PAY FOR IT?

- Better asset utilisation and other private sector incentives
- Fiscal devolution
  - May provide long term additional revenue through incentive effects. Fiscally neutral initially though.
  - Allow London greater borrowing capacity.
- And new sources of funding may still be needed.
  - Arup providing a menu of options with estimates
- We will consult on the options.

NEXT STEPS

- **Final refinements to narrative and proposals**
- **Publish the consultation report (and supporting documentation) – end July.**
- **Extensive consultation – with Assembly, industry, government, and Londoners.**
- **Publish the final report Winter 2014/15.**

GLAECONOMICS

London and the Greater South East

Matthew Waite

Senior Economist

GLA Economics

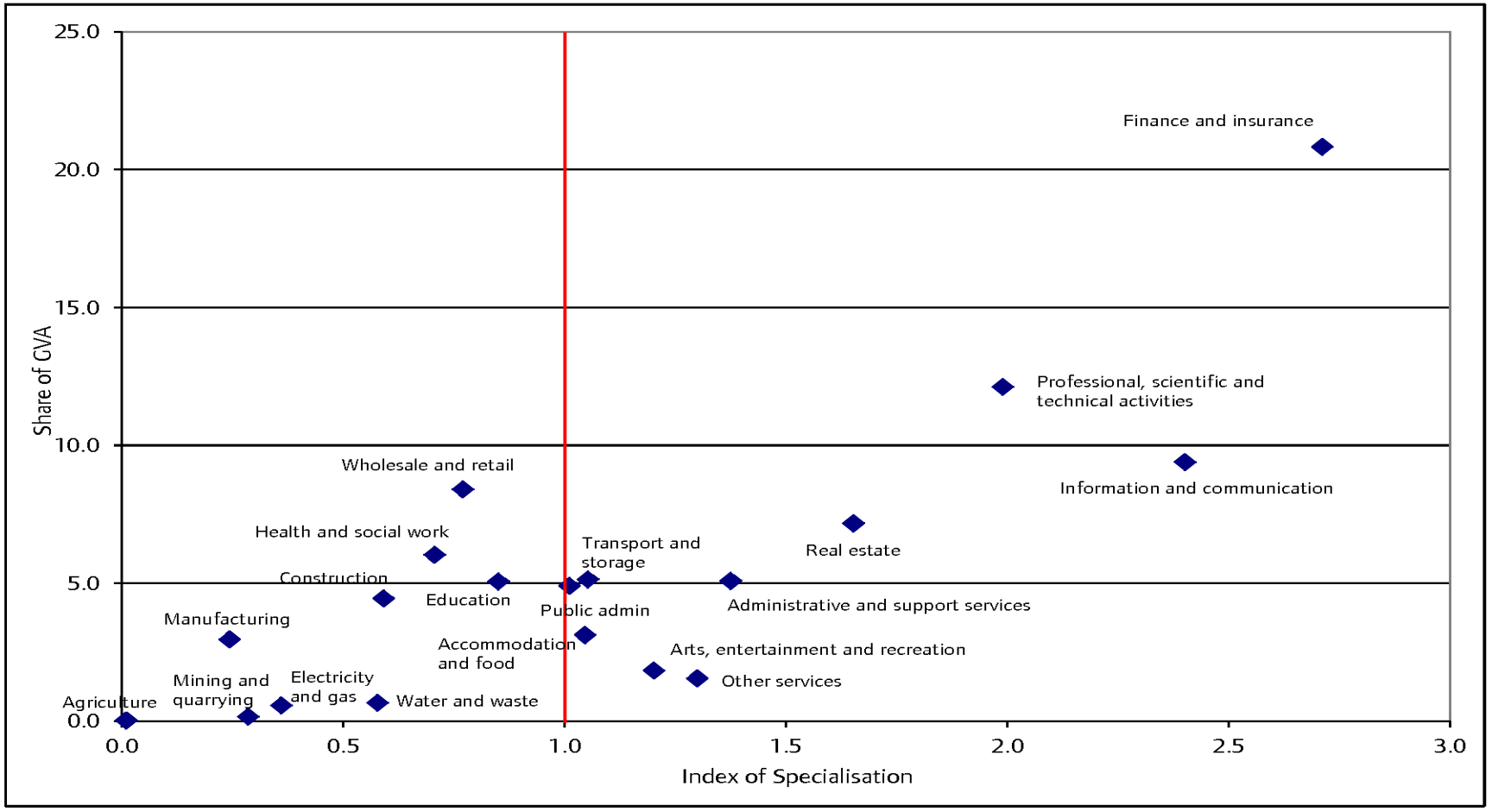
25th June 2014

Overview

- The forces affecting London's economy
- Relationship between London's economic growth and that for Greater South East;
- Interdependence of London and Greater South East:
  - Migration;
  - Commuting.
- Conclusion.

Areas specialise because of trade and London specialises in financial and business services …

London's broad sectors: Index of specialisation and share of London's output



Source: *Source: GLA Economics based on data from the ONS Business Register and Employment Survey (BRES) and ONS Regional Gross Value Added (GVA) series*

… with business attracted to locating in London …

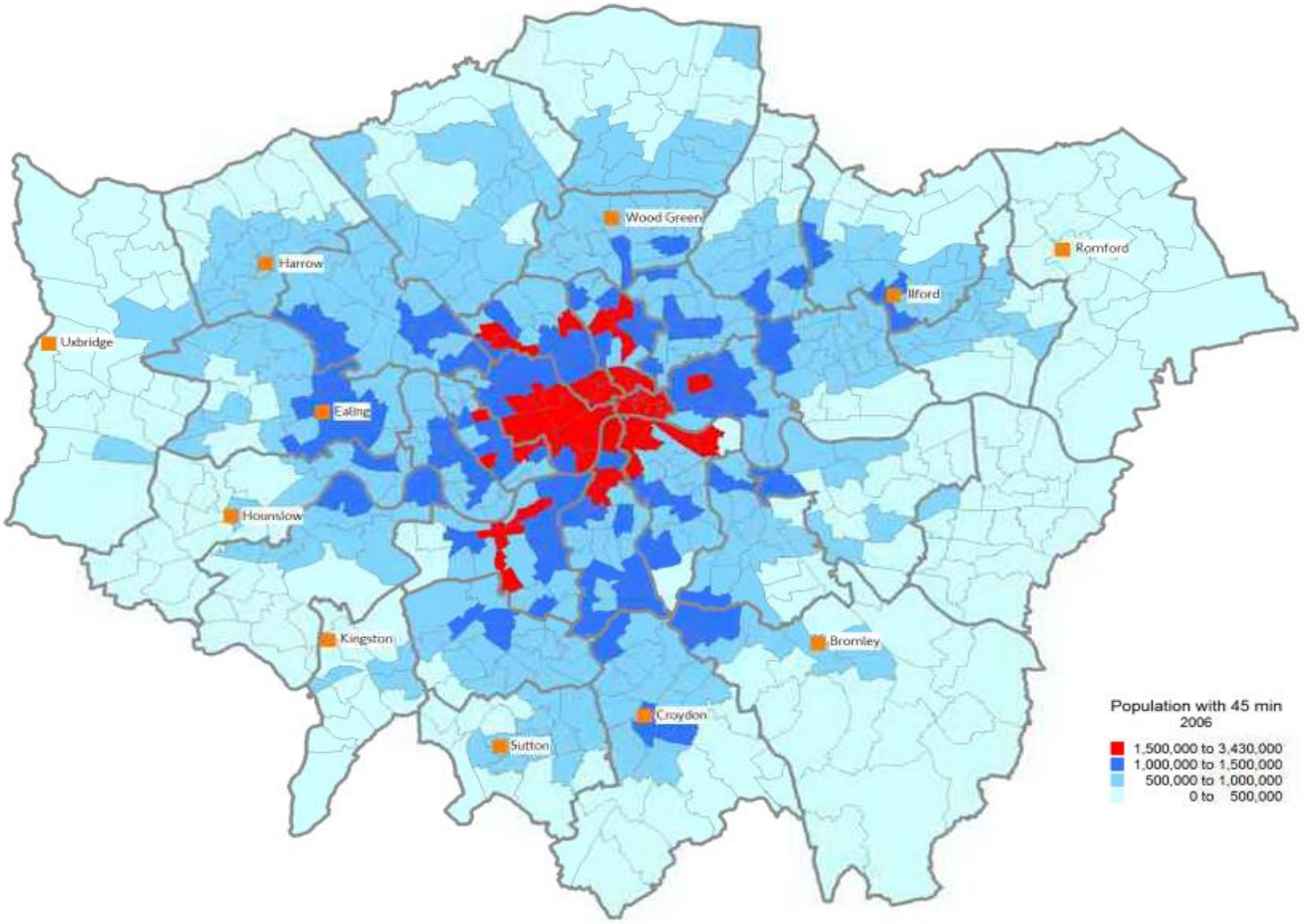
Attractiveness of London to business

	2011	2010	2009	2008	2011 Lead
Availability of qualified staff	1	1	1	1	London
Easy access to markets	1	1	1	1	London
Quality of telecommunications	1	1	1	1	London
External transport links	1	1	1	1	London
Cost of staff	=30	29	28	29	Bucharest
Climate for doing business	3	2	4	5	Dublin
Language spoken	1	1	1	1	London
Office space - value for money	=24	26	23	24	Warsaw
Internal transport	1	1	1	1	London
Availability of office space	10	=4	2	5	Berlin
Quality of life	10	10	11	14	Barcelona
Freedom from pollution	25	=25	29	27	Stockholm

Source: European Cities Monitor, Cushman & Wakfield (2008-2011)

… being able to access a large volume of people who themselves are attracted to live and work in London.

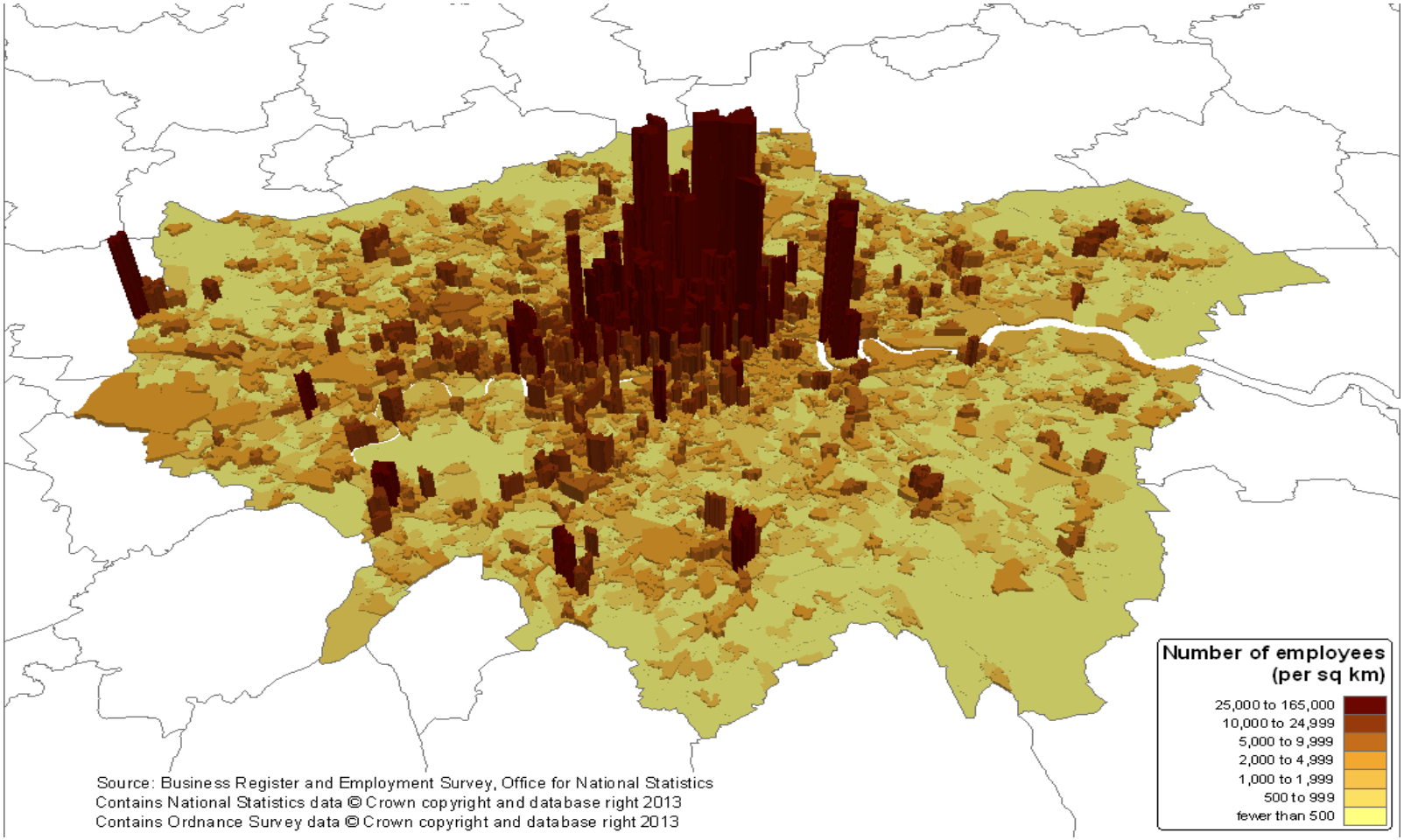
Number of residents accessible by public transport in 45 minutes



Source: TfL

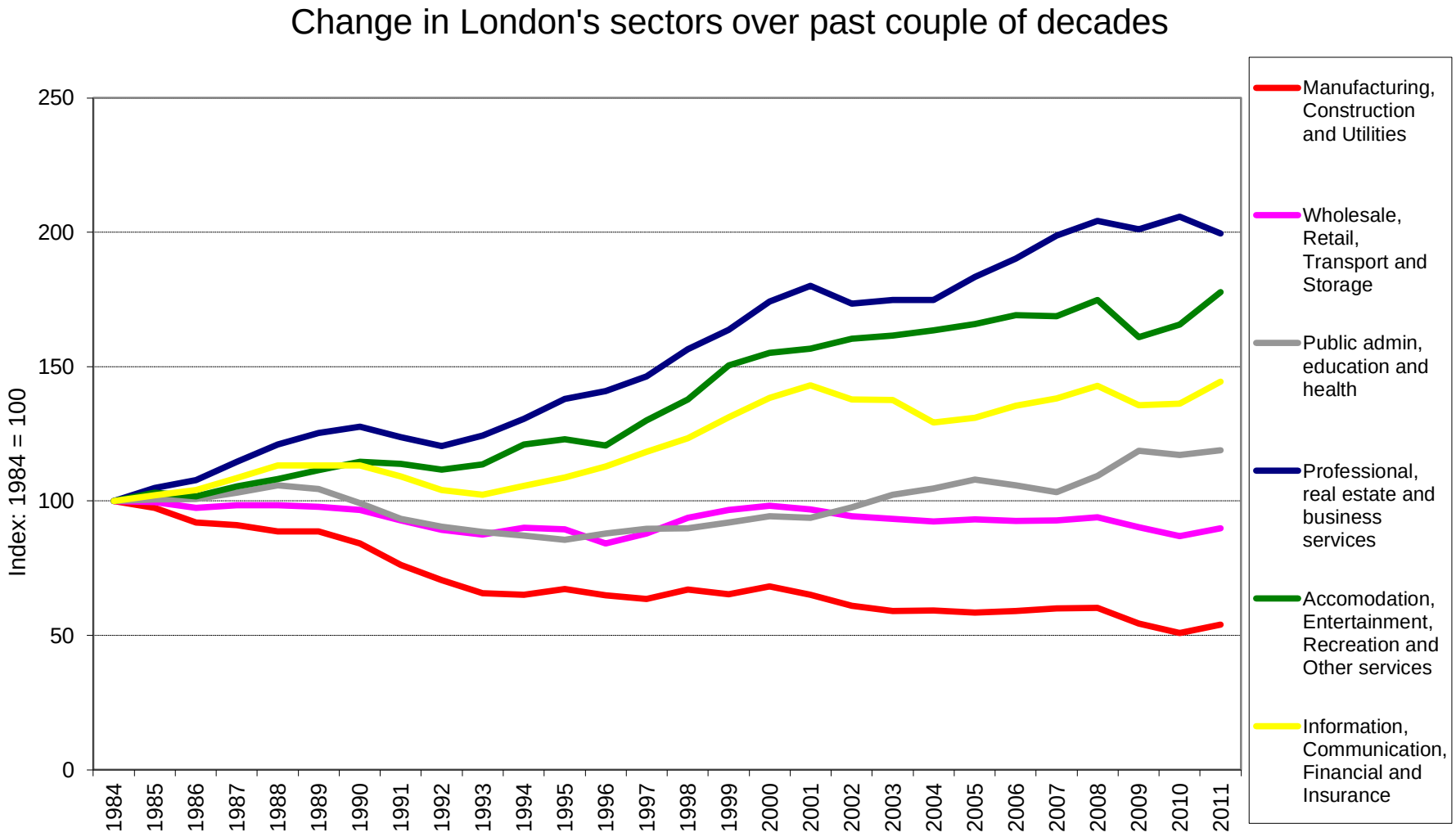
So there is a concentration of employment in London, particularly central London.

Number of employees per sq km, all sectors



Source: ONS (BRES) 2012

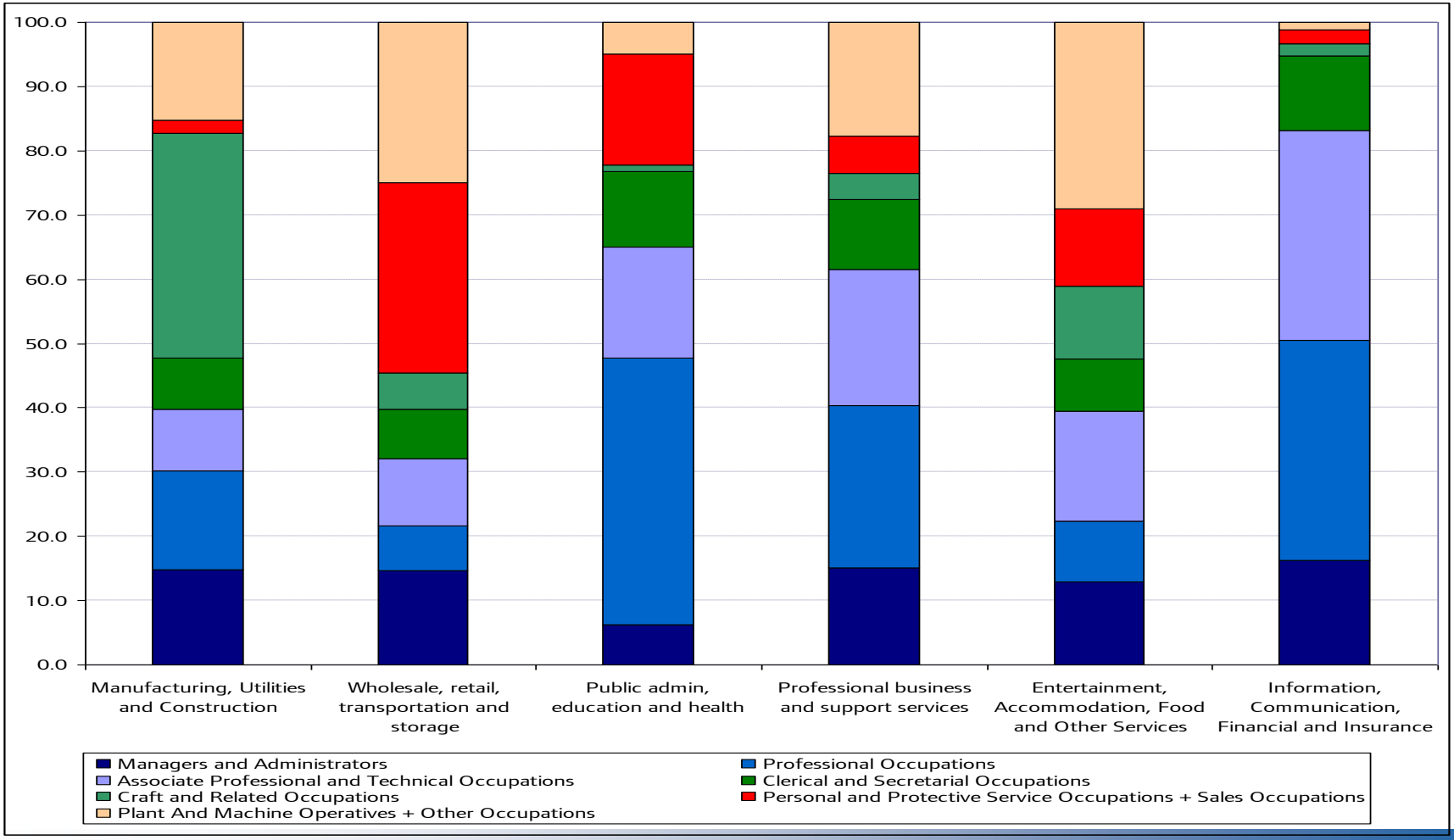
London's structural change over time …



Source: GLA Economics

… has driven demand for highly skilled occupations …

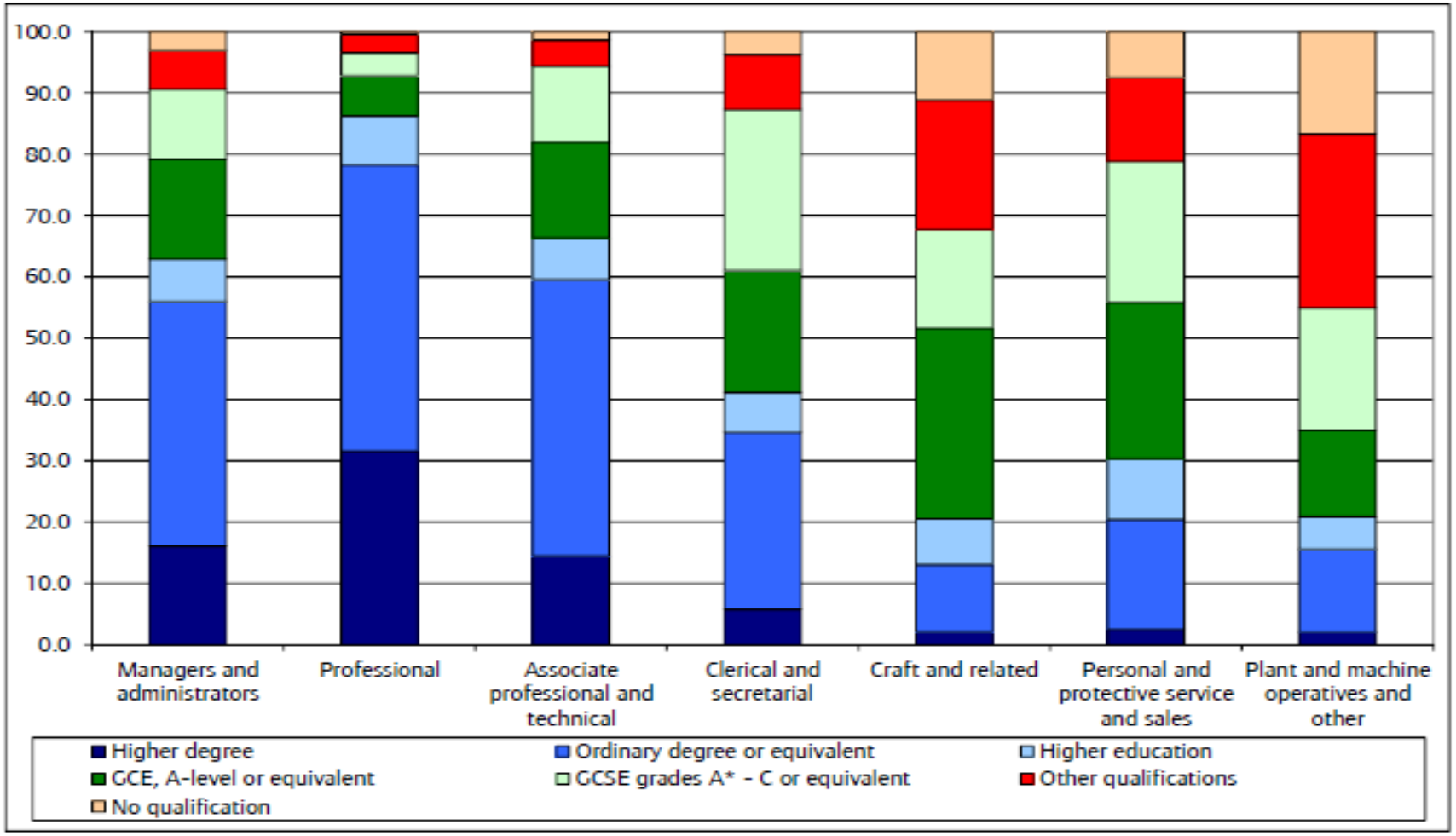
Share of occupations within broad sectors in London



Source: GLA Economics

… which themselves tend to demand high qualifications.

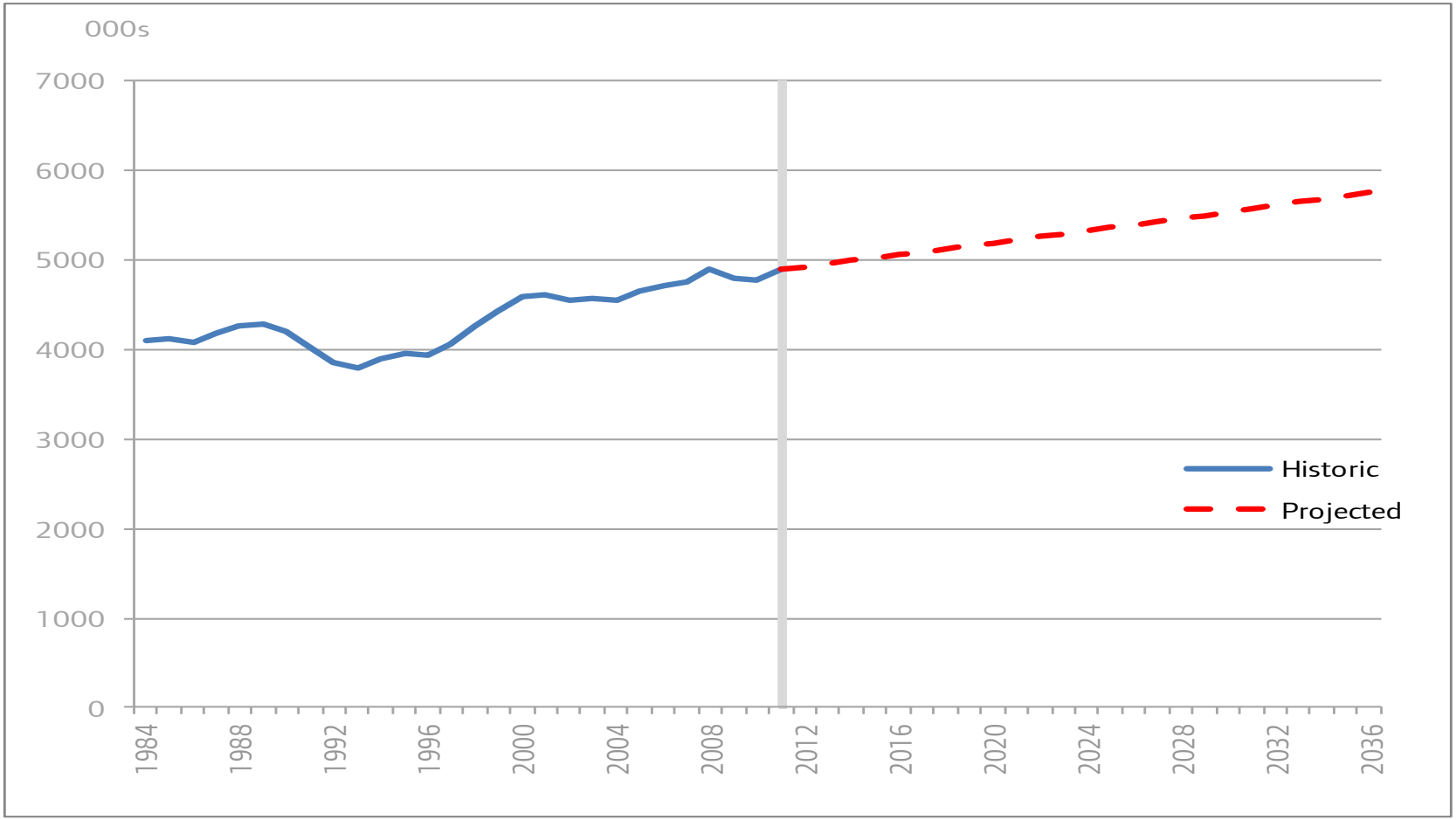
Share of qualifications within occupations in London



Source: GLA Economics

More employment growth is projected in London …

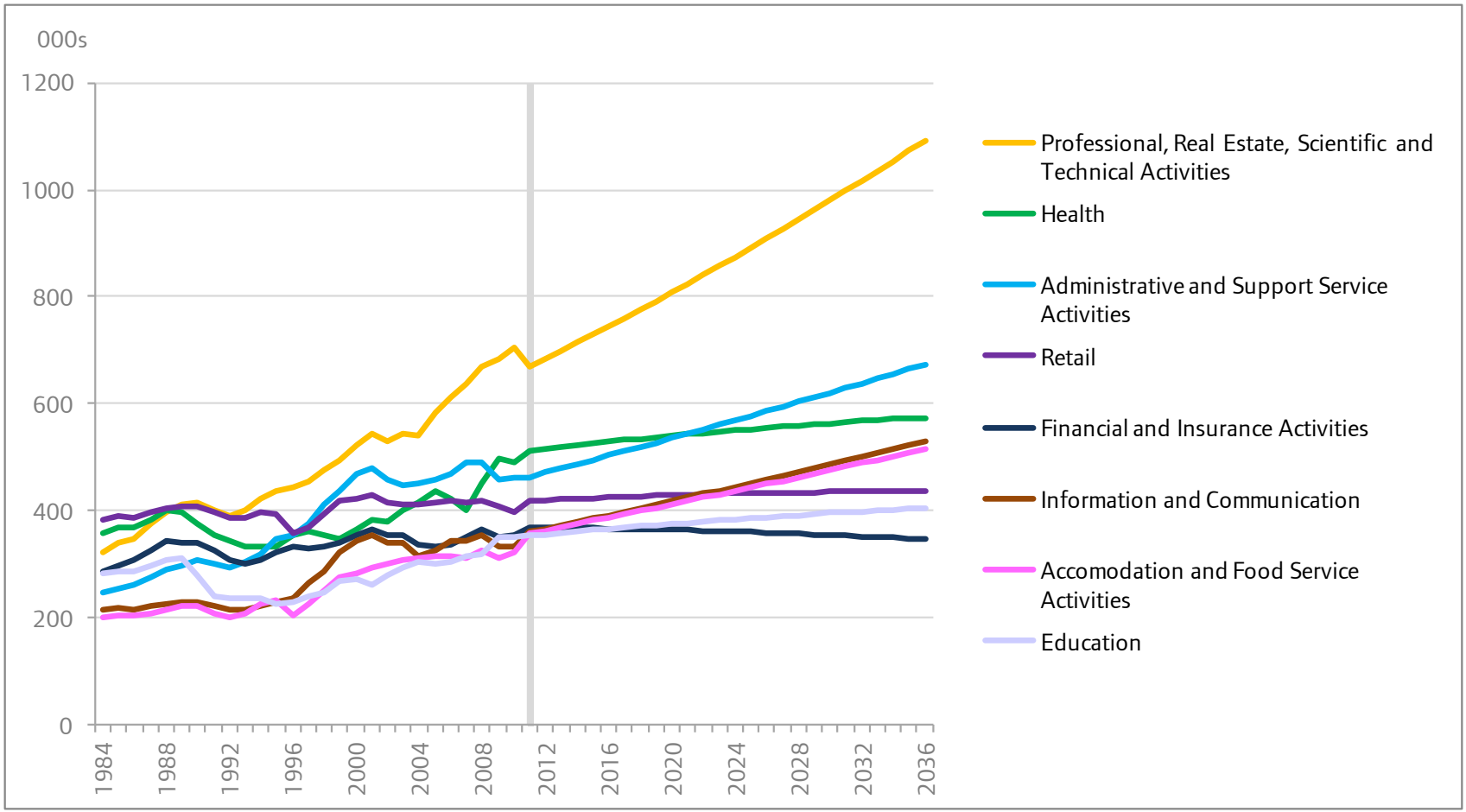
Employment projection for London to 2036



Source: GLA Economics

… with continuing growth in high end business services.

Employment projections by sector for London to 2036



Source: GLA Economics

GLAECONOMICS

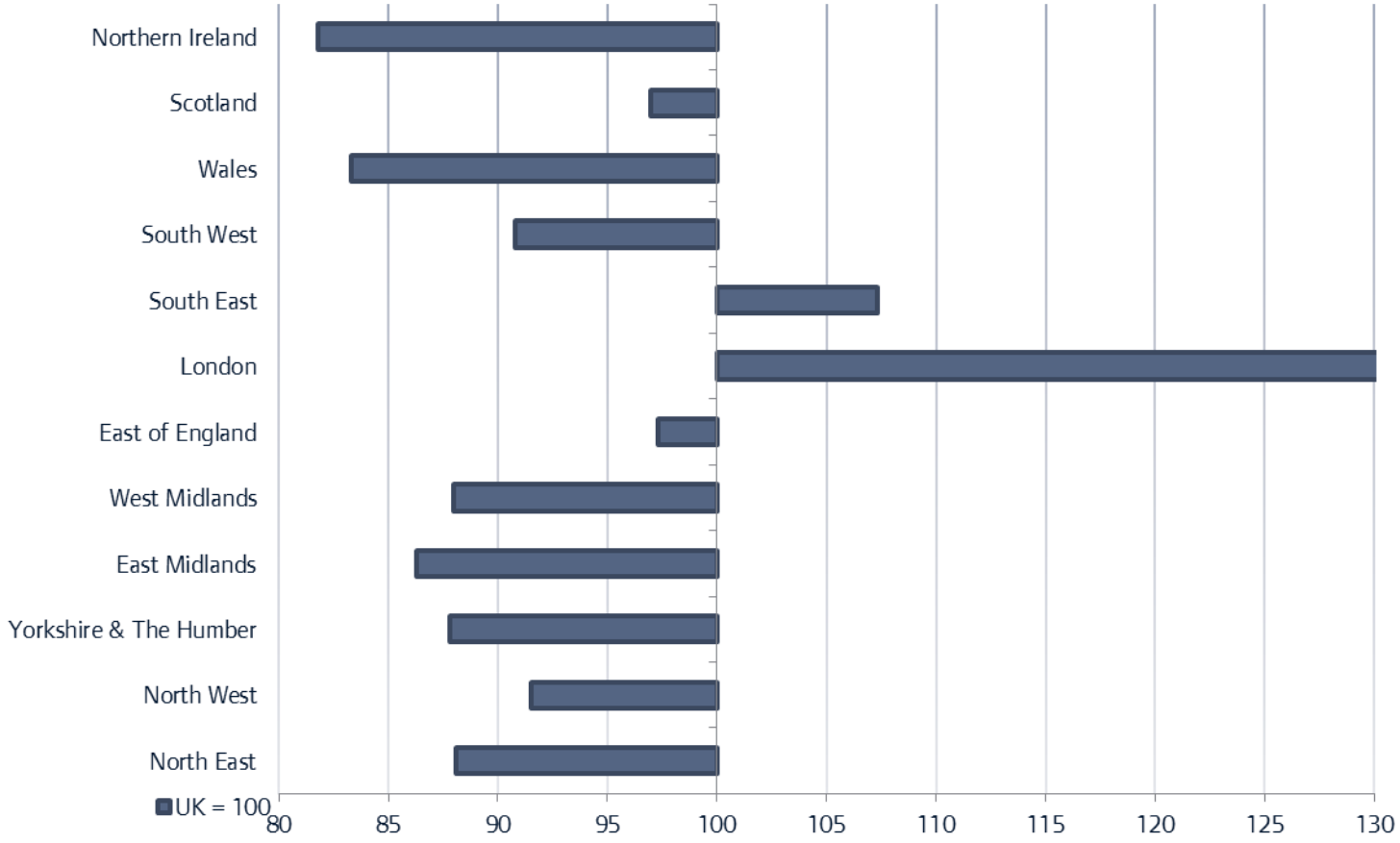
Similar forces impact on the GSE, meaning the economies tend to move together …

Annual nominal GVA growth for London and the rest of the Greater South East, 1998 to 2012

Source: ONS

… and leads to higher productivity in both London and the GSE when compared to the UK as a whole …

London and GSE productivity in comparison to other regions and to UK average, 2012



Source: ONS

… which has resulted in the GSE region generally contributing more in tax revenue than it receives in expenditure over time.

Net fiscal contribution of UK regions 1999/00 to 2010/11 (£ billion)

	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	Long-run Average
Wales	-5.4	-5.9	-6.4	-8.0	-8.5	-9.2	-9.6	-9.4	-9.9	-13.0	-15.2	-15.0	-9.6
Scotland	-2.8	-1.5	-1.8	-4.4	-6.1	-5.4	-2.6	-3.5	-4.7	-4.6	-14.2	-11.1	-5.2
Northern Ireland	-4.4	-5.2	-5.7	-6.3	-6.6	-7.0	-7.3	-6.9	-7.3	-9.5	-10.7	-10.4	-7.3
North East	-4.6	-4.9	-6.7	-7.3	-6.7	-7.5	-7.6	-6.7	-7.3	-10.3	-12.5	-12.2	-7.9
North West	-4.0	-5.4	-8.3	-10.1	-9.6	-10.5	-10.3	-12.1	-12.6	-18.6	-24.4	-22.9	-12.4
Yorkshire and Humberside	-1.7	-2.7	-4.9	-6.7	-6.6	-7.4	-7.3	-7.4	-8.1	-13.3	-17.6	-16.2	-8.3
East Midlands	1.9	1.4	-0.5	-0.7	-1.9	-2.7	-2.8	-2.3	-2.2	-6.8	-10.1	-9.4	-3.0
West Midlands	0.8	0.2	-2.1	-3.4	-4.6	-5.5	-6.3	-5.5	-6.3	-12.1	-17.1	-15.5	-6.5
South West	1.2	0.2	-0.8	-1.4	-3.1	-4.3	-4.8	-3.7	-4.5	-10.6	-14.3	-12.8	-4.9
East of England	8.3	8.6	8.1	6.7	5.5	5.7	4.1	5.9	6.6	0.0	-4.3	-3.7	4.3
South East	17.6	19.4	17.9	14.7	11.7	11.0	13.4	15.4	15.8	5.9	1.2	5.3	12.4
Greater London	16.3	19.0	14.8	9.2	9.1	13.1	14.6	18.9	22.3	9.7	-0.1	5.1	12.7
United Kingdom	23.2	23.2	3.6	-17.5	-27.6	-29.7	-26.4	-17.3	-18.1	-83.1	-139.5	-118.9	-35.7

Source: Oxford Economics/City of London Corporation

The London/GSE border is arbitrary from an economic point of view – so people flow over it in numbers!

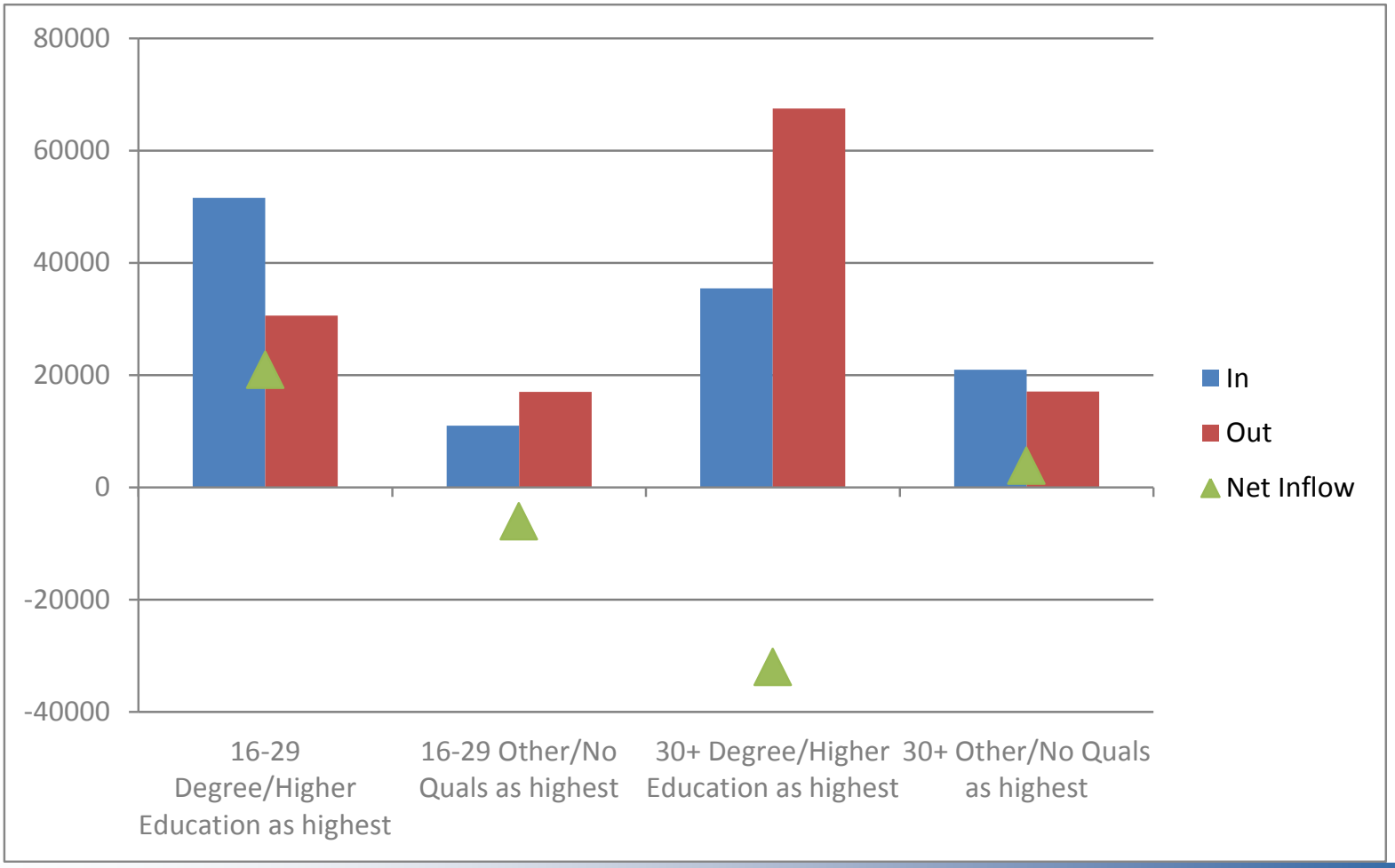
Average annual inflows and outflow between London and other UK regions, 1975 to 2012

Migration to and from London by origin and destination			
(Average 1975 to 2012)	To London	From London	Net Balance
North East	5,000	3,900	1,100
North West	13,100	10,900	2,200
Yorkshire and Humberside	10,000	8,600	1,400
East Midlands	9,900	11,200	-1,300
West Midlands	11,500	10,000	1,500
East	29,700	56,500	-26,800
South East	52,600	85,400	-32,800
South West	15,400	21,100	-5,700
Wales	5,500	5,600	-100
Scotland	7,900	6,900	1,000
Northern Ireland	1,800	1,700	100
Total	162,400	221,800	-59,400

Source: ONS migration statistics

London sees a net inflow of young, well qualified, people but an outflow of older, well qualified, folk…

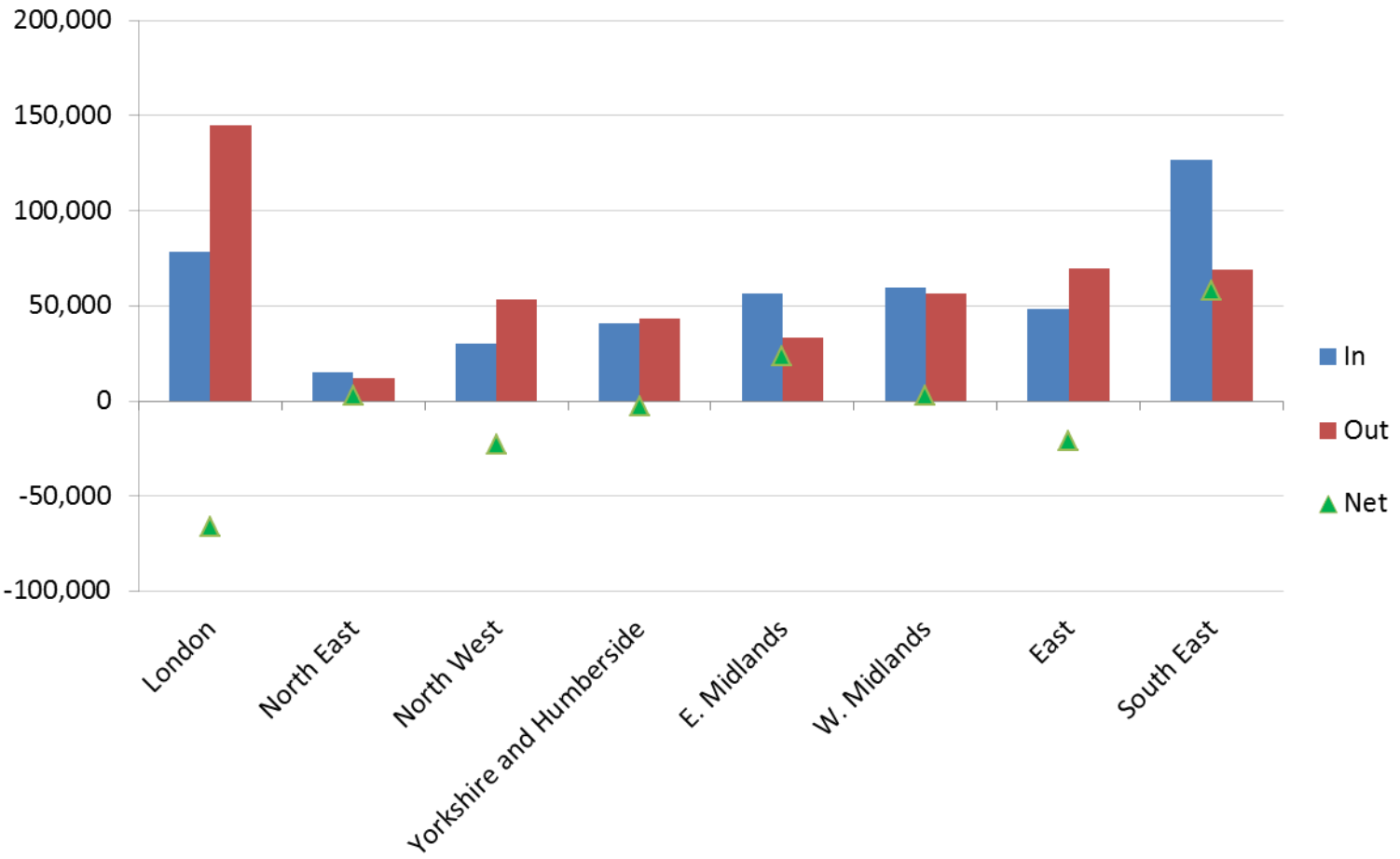
Migration to/from London by age and highest qualifications, excl. fulltime students, 2011/12



Source: GLA Economics calculations based on ONS LFS (spring 2013) and ONS domestic migration statistics (2012)

… for example, London loses more 'managerial and professional' occupations than it gains (in contrast to GSE).

Migration, 2011/12, by individuals in managerial and professional occupations



Source: GLA Economics calculations based on ONS LFS (spring 2013) and ONS domestic migration statistics (2012)

Some of these migrants will commute back into London ...

Commuters into London by UK region

Region of residence	Commuters into London (%)	Share of employed residents in the region of origin (%)	Share of workers in London (%)
South East	50.7	10.3	9.9
East of England	40.4	12.1	7.9
South West	2.5	0.9	0.5
East Midlands	2.1	0.8	0.4
West Midlands	1.2	0.4	0.2
Scotland	1.1	0.4	0.2
North West	0.9	0.2	0.2
Yorkshire & the Humber	0.7	0.3	0.1
North East	0.2	0.2	0.0
Wales	0.1	0.1	0.0
Northern Ireland	0.1	0.1	0.0
Total number of in-commuters	100	3.4	19.4

Source: Labour Force Survey (Oct-Dec 2013)

… but commuting is not 'one-way' traffic …

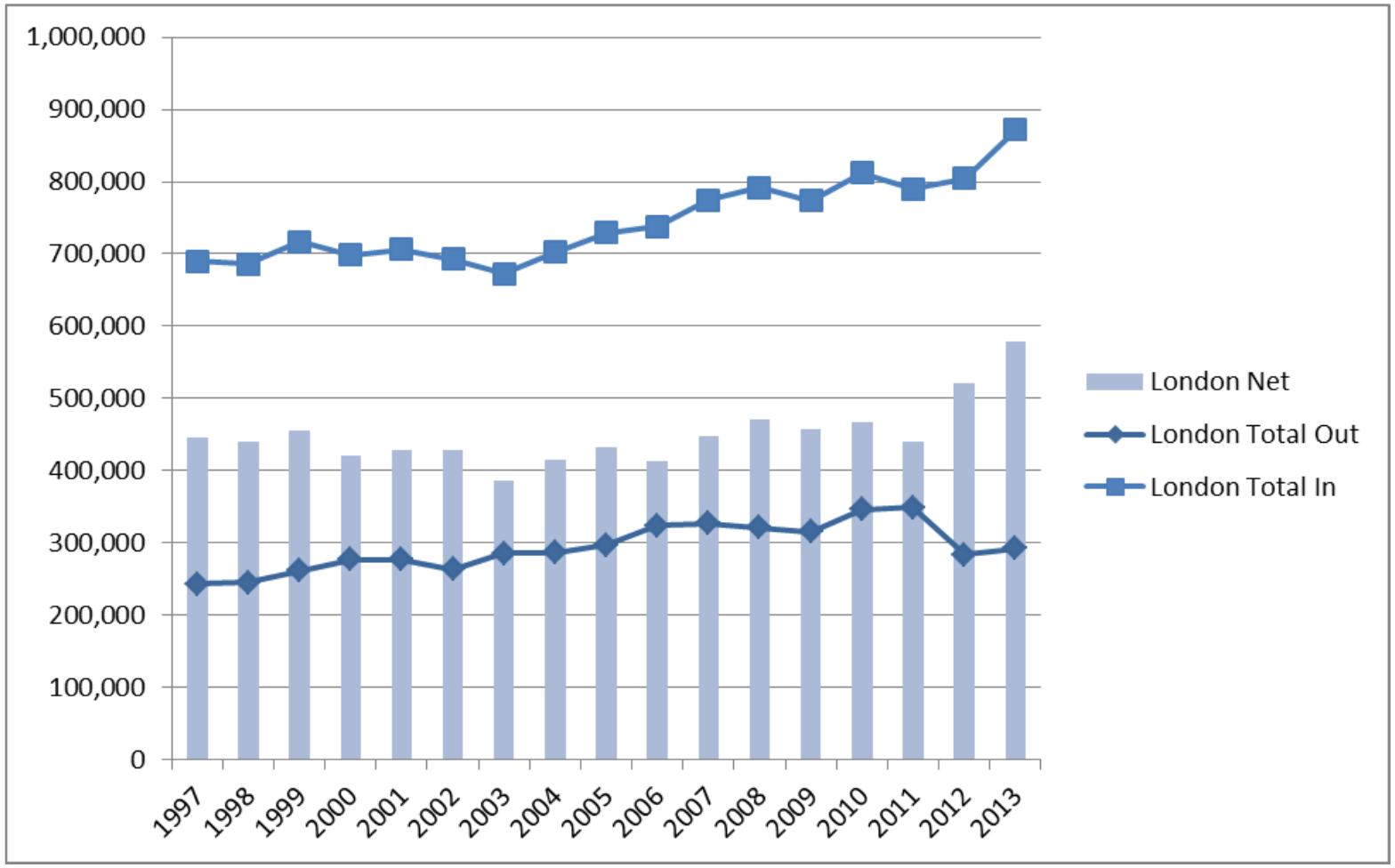
Out-commuters from London to UK region of work

Region of work	Out-commuters from London (%)	Share of employed residents in London (%)	Share of workers in region of destination (%)
South East	53.0	4.2	4.0
East of England	30.2	2.4	3.5
South West	4.3	0.3	0.5
Scotland	3.5	0.1	0.3
North West	2.1	0.1	0.2
West Midlands	1.9	0.3	0.2
East Midlands	1.7	0.2	0.2
Yorkshire & the Humber	1.5	0.1	0.2
Wales	1.3	0.1	0.2
North East	0.7	0.1	0.3
Northern Ireland	0.0	0.0	0.0
Total number of out-commuters	100	7.8	1.2

Source: Labour Force Survey (Oct-Dec 2013)

… though London 'net' commuting (from all regions) has picked up, particularly recently.

In, out and net commuting to London, 1997 to 2013



Source: Labour Force Survey (Spring quarters 1997-2013) and GLA Economics calculations

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Conclusions

- London and the GSE are subject to similar global trends and, as a result, tend to grow (or contract) together;
- The two 'economies' are linked together through 'people'
  - Each year London loses more people to other regions of the UK – and principally the South East and East regions – than it gains from other regions of the UK;
  - London typically attracts a net inflow of young, well educated, people from the rest of the UK, but also 'exports' a net outflow of older, well educated people.
- A significant number of workers from the South East and East commute into London to work (more than commute out from London to the GSE).

FALP Wider South East event

25th June 2014

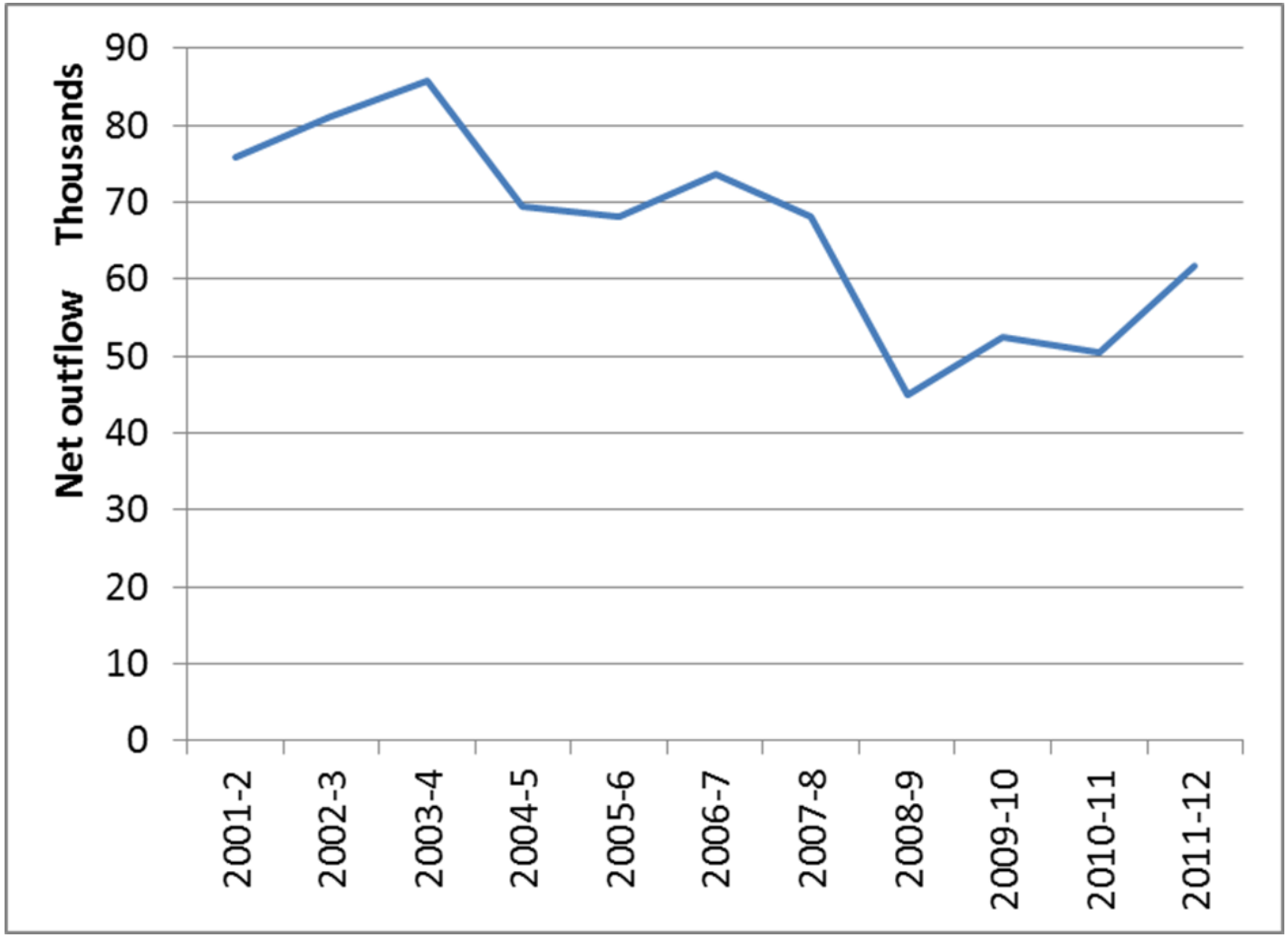
Ben Corr
GLA Demography

- Uncertainty in London's future population
- Sensitivity to migration assumptions
- "Normal" migration
- ONS, DCLG and GLA projections
- Wider regional context

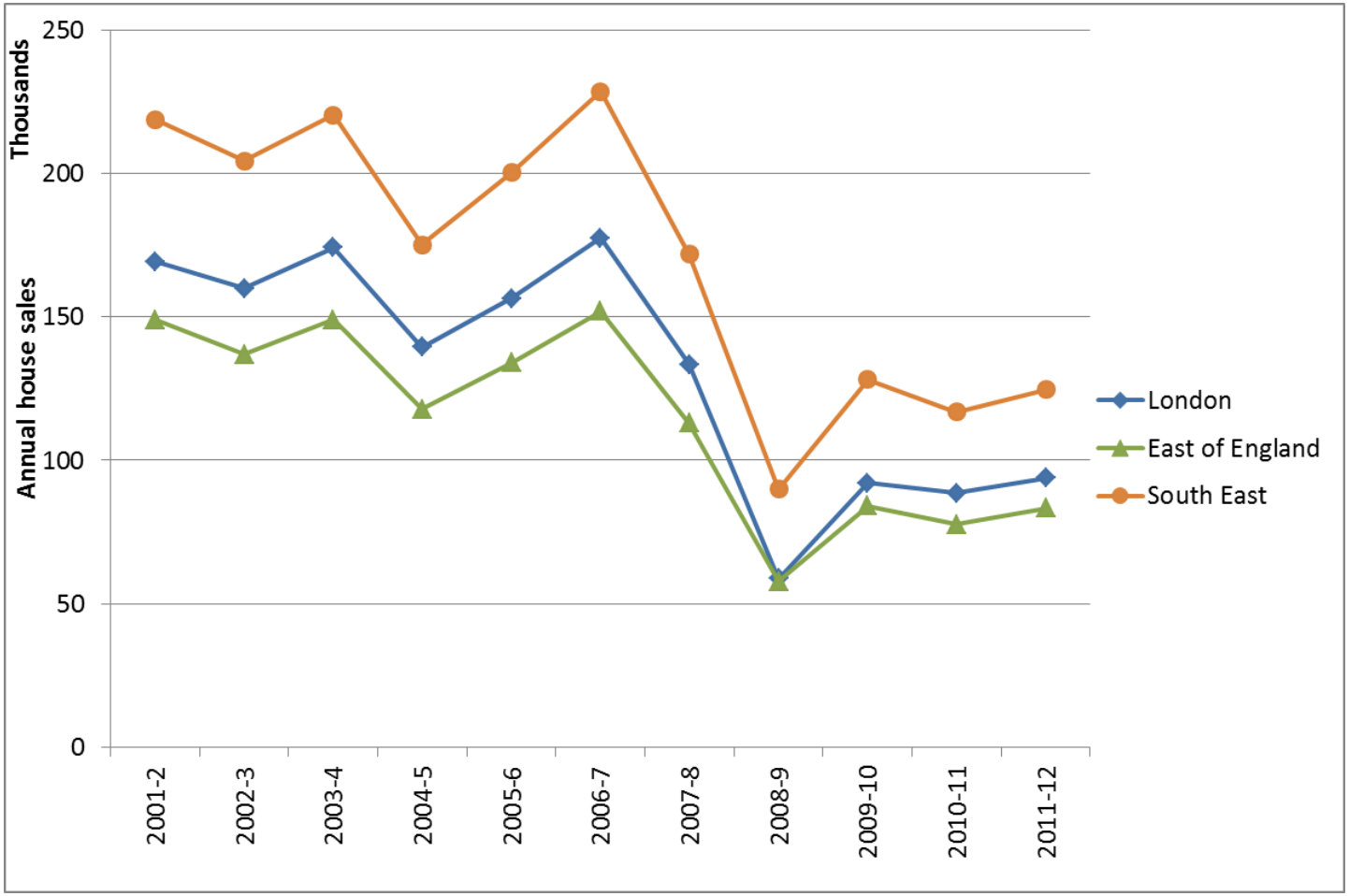
Projection uncertainty

- Arises primarily from uncertainty in future domestic migration patterns
- Recent trends influenced by financial crisis
- Impact of economic recovery unknown

Net outflows from London to RoSE



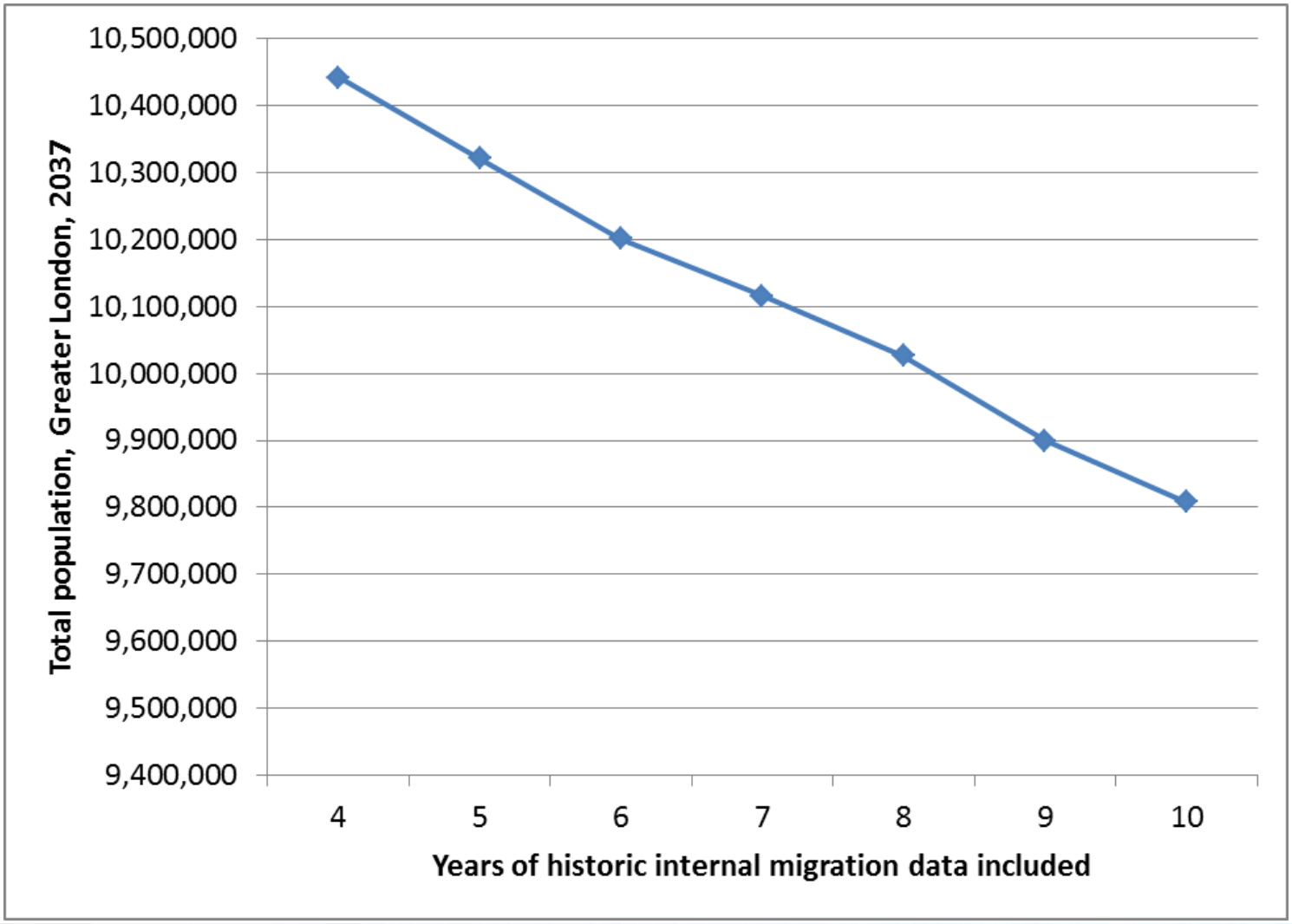
Annual house sales in south east



Sensitivity to migration assumptions

- Projections very sensitive to period used to establish migration norms
- ONS assume last five years to be typical
- GLA modelling exercise:
  - Changing from five-year to ten-year back-series
  - 500,000 range in projected 2037 population
- Impact on RoSE *could be* of that order of magnitude

Sensitivity testing results

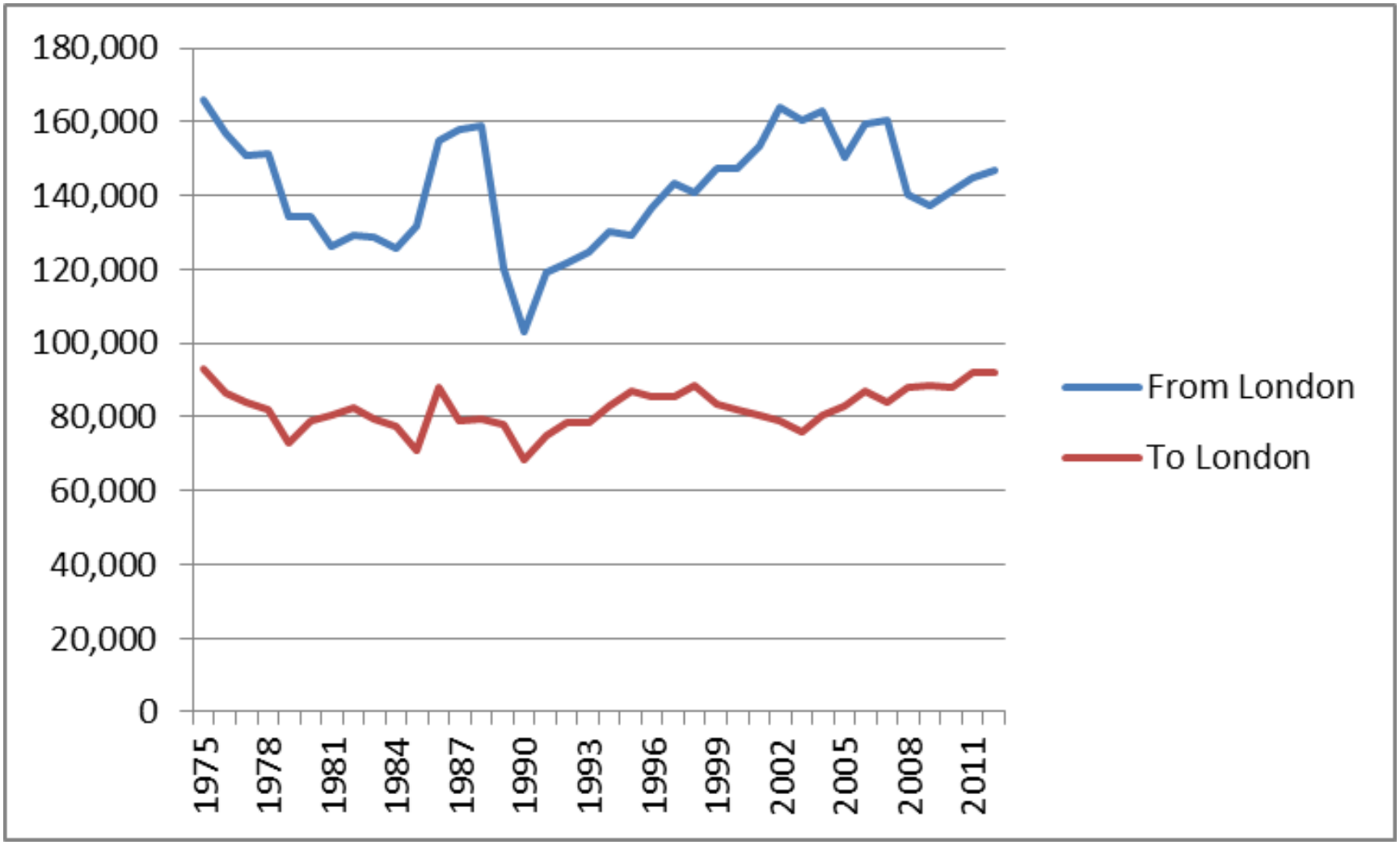


What is ‘normal’ migration?

- Are flows post crash “normal”?
- What about pre-crash flows?

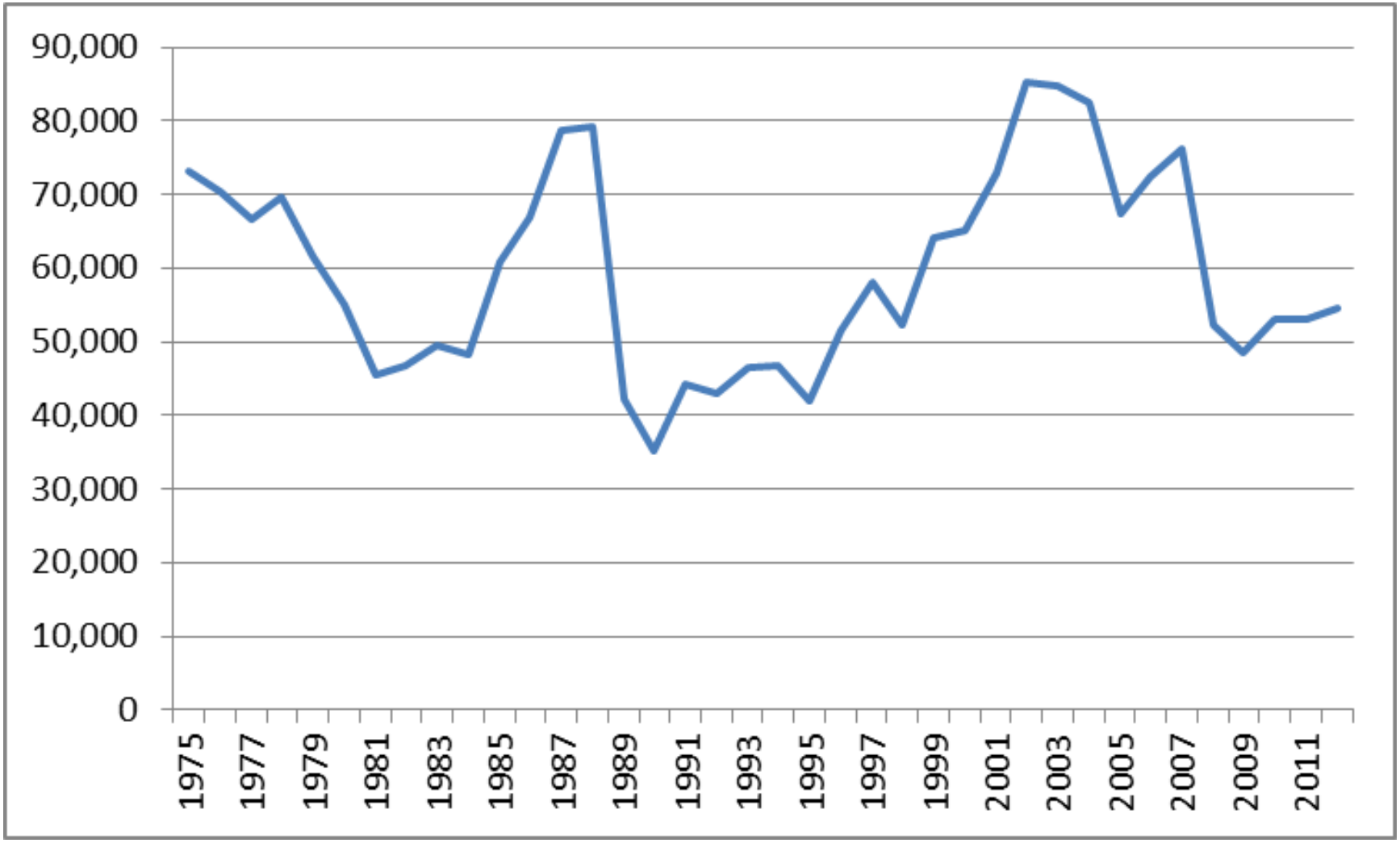
Long term migration trends

Gross flows between London and ROSE



Long term migration trends

Net outmigration to ROSE



What is ‘normal’ migration?

Net outmigration to ROSE*:

- 5-year average – 44k
  - As used in ONS 2012-based SNPP
- 10-year average – 68k
- 38-year average – 59k
- Large range of plausible scenarios
- ONS projection assumes the extreme low end

*Based on ONS estimates prior to addition of HESA component – will not align perfectly with updated official figures

ONS/DCLG projections

- Current household series: 2011-based interim
  - Based on 2011-based interim ONS SNPP
- This population projection is methodologically flawed
  - Pre-census rates applied to post-census population
- LA CLIP Population Sub-Group members felt strongly enough to write to DCLG chief statistician…

ONS/DCLG projections

"we believe these projections should **not** be used for this purpose [household projections] and that you consult urgently with ONS as to the usability and plausibility of these Interim 2011-based SNPPs"

Piers Elias, Tees Valley Unlimited and Baljit Bains Greater London Authority
Joint Chairs, on behalf of the Local Authority side of the CLIP Population Sub-group
10th October 2012

ONS/DCLG projections

- May: ONS release 2012-based SNPP
- 2011-SNPP flaws replaced with a few quirks
- GLA's main concerns centre around the period of domestic migration considered
  - Mid-2007 to mid-2012
  - Lowest possible outmigration scenario
  - Worth considering, but not as a "central" projection

ONS/DCLG projections

- DCLG 2012-based household projections due autumn 2014
- Based on 2012-based SNPP

Official variant projections

- GLA has lobbied ONS/DCLG to produce variant projections
  - Based on longer internal migration time series
- Hopeful that both population and household projection variants will eventually be produced

GLA projection scenarios

- GLA variants produced using three different domestic migration “recovery” scenarios
- Based on hypothetical post-2017 economic recovery and effect on domestic migration

GLA projection scenarios

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

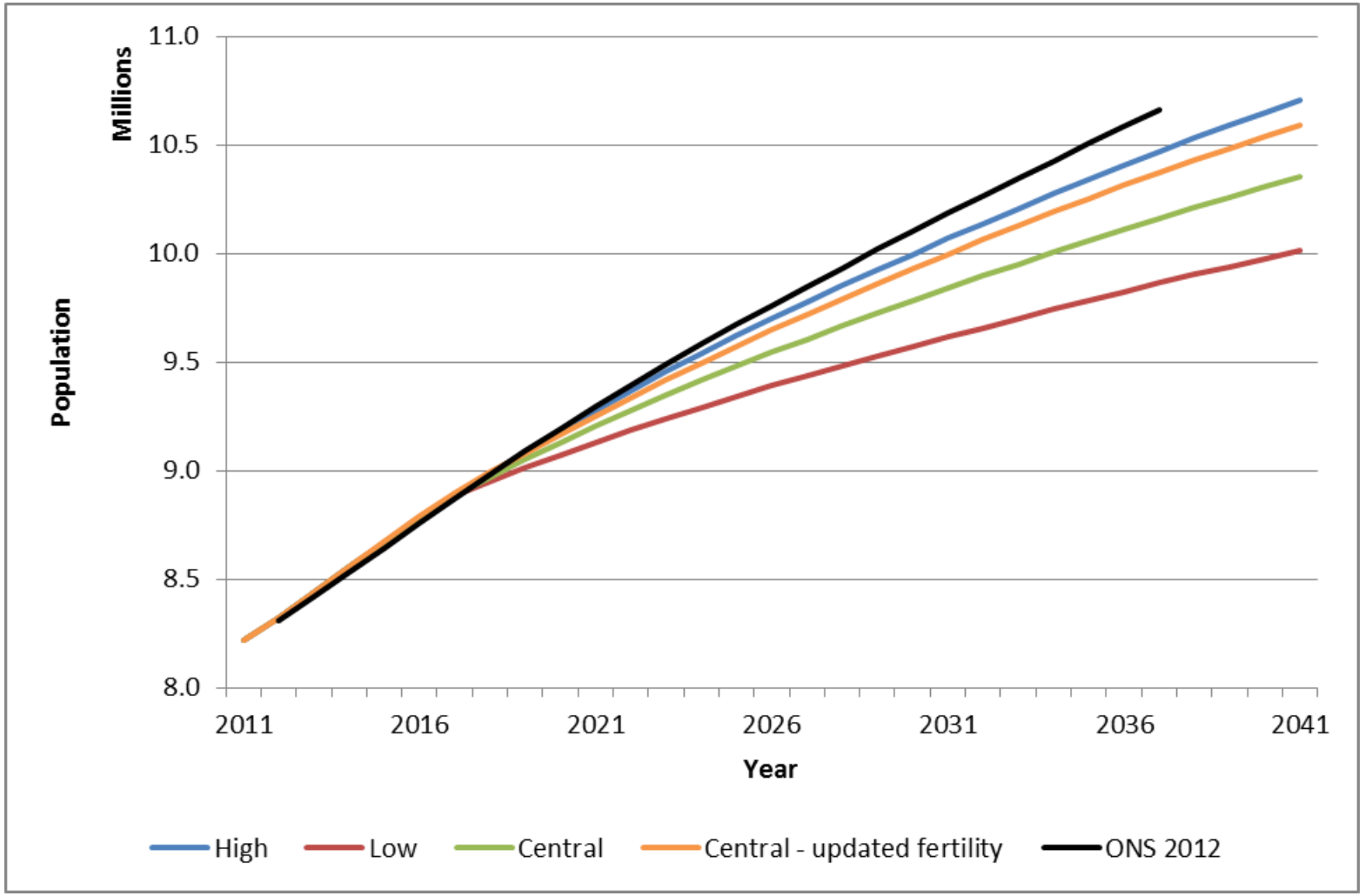
GLA projection scenarios

High – migration propensities based on recent 4 year patterns for duration

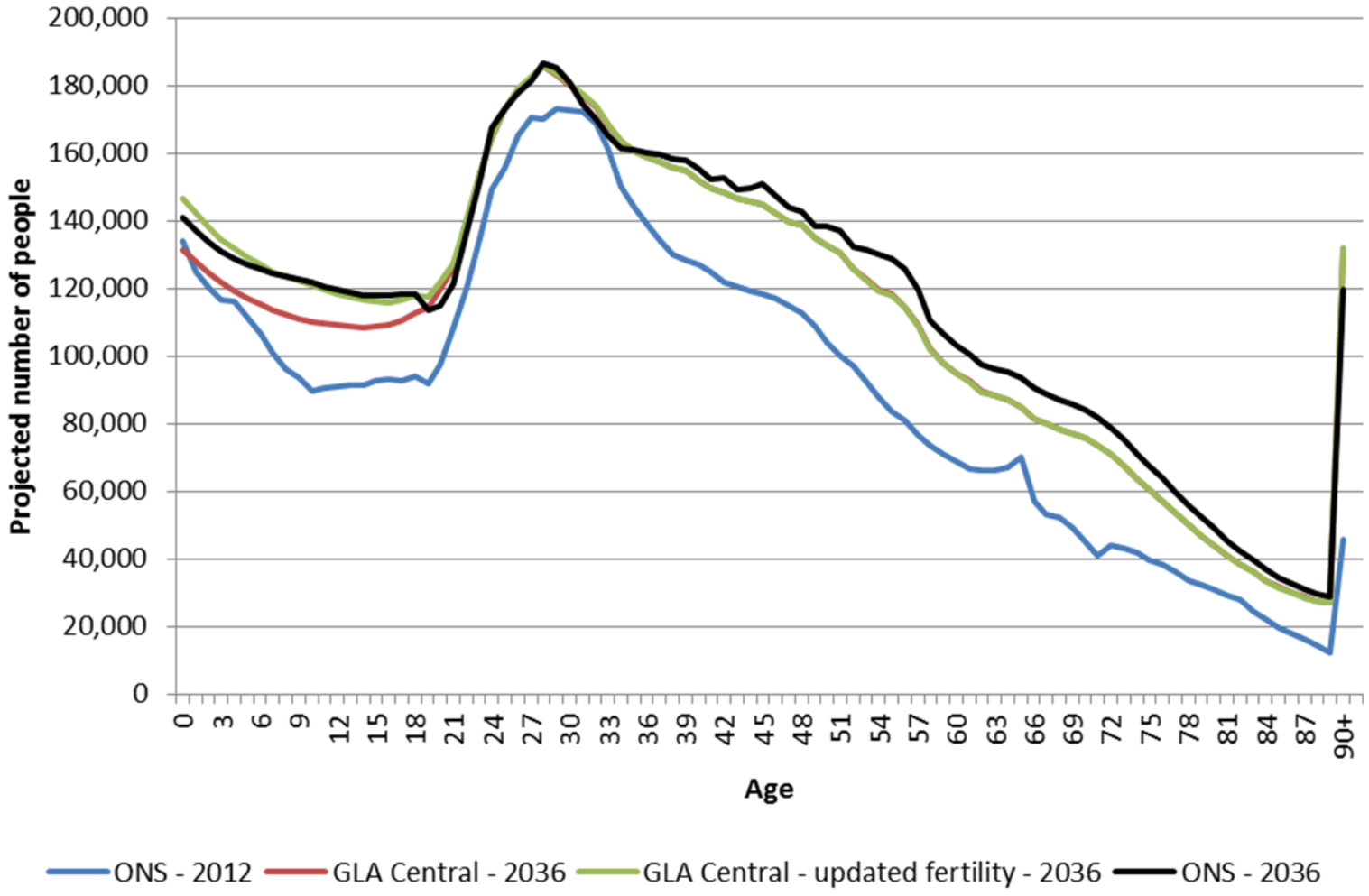
Low – after 2017, out-migration increases by 10%, in-migration falls by 6%

Central– after 2017, out-migration increases by 5%, in-migration falls by 3%

Projected London population



Comparison of age structures



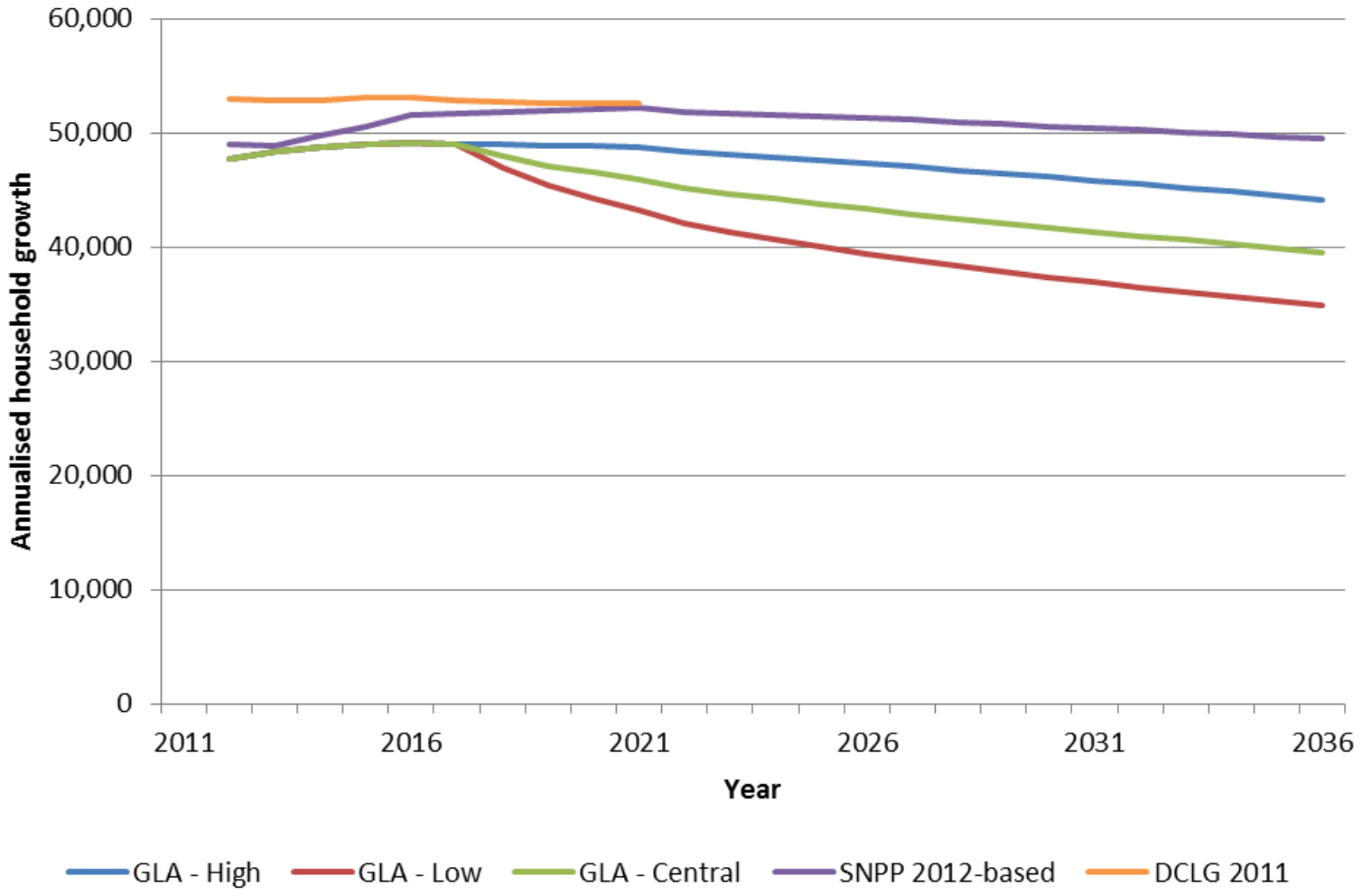
Household projections

- DCLG 2012-based household projections due autumn 2014

In the meantime:

- Can use 2011 HH model to create set of projections based on 2012-based SNPP
- GLA intends to do same for RoSE districts
  - Shall distribute when ready

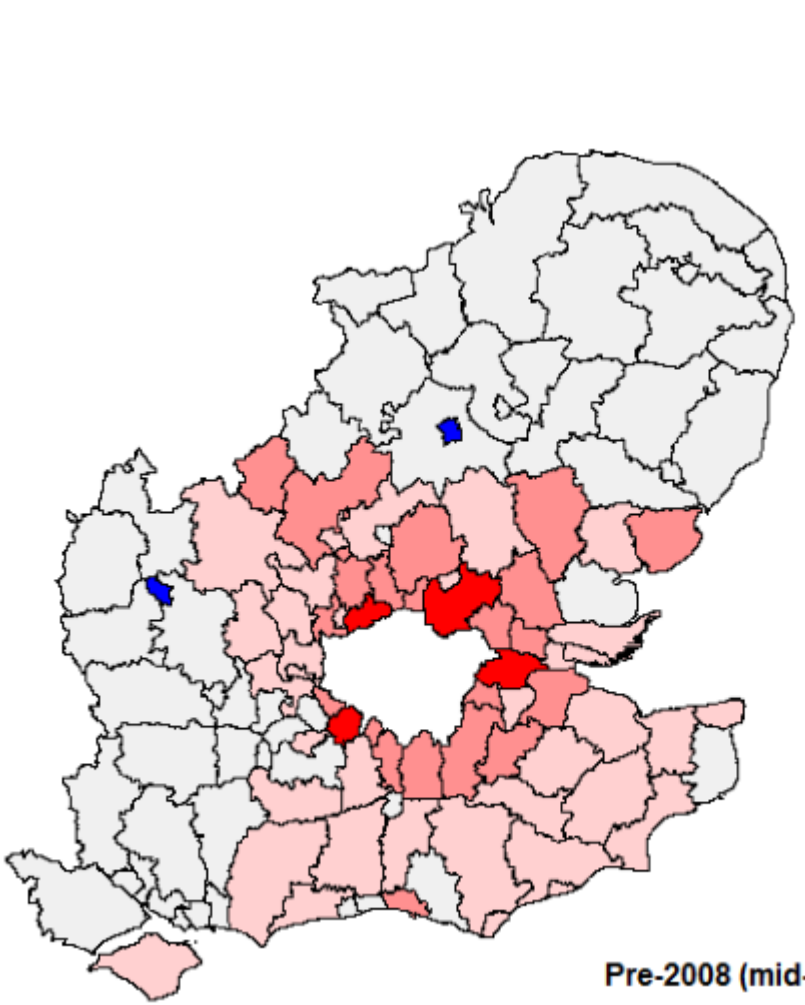
Household projections



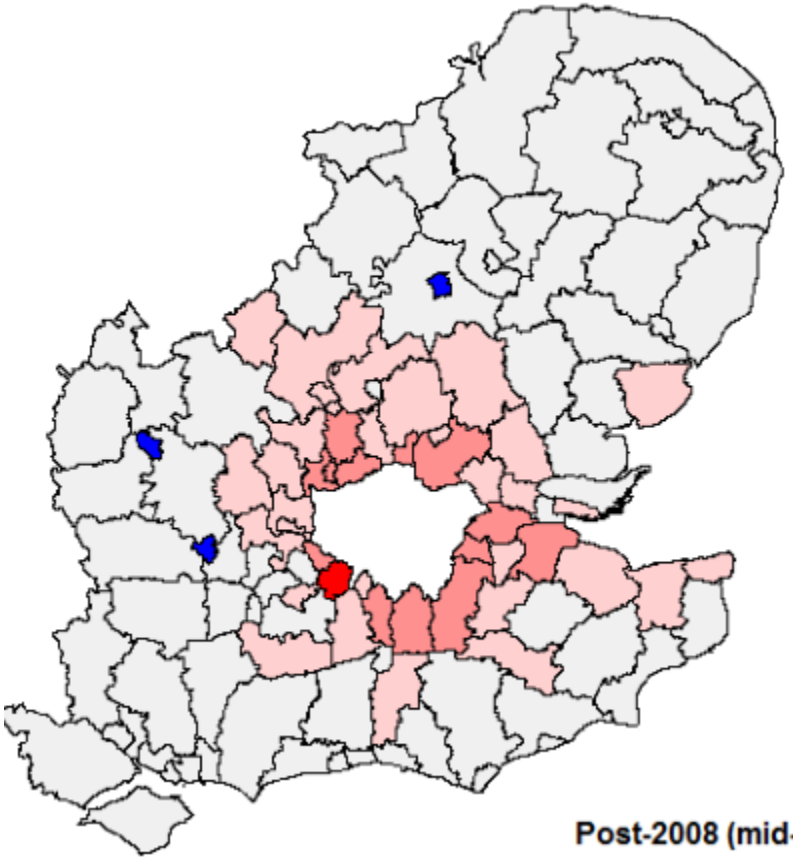
Wider regional context

- Wider south east is London's biggest migration "partner"
- Uncertainty for London = uncertainty for surrounding counties
- If migration flows return to pre-crash levels, what might impact on region be?

Net migration from London pre- and post-crash

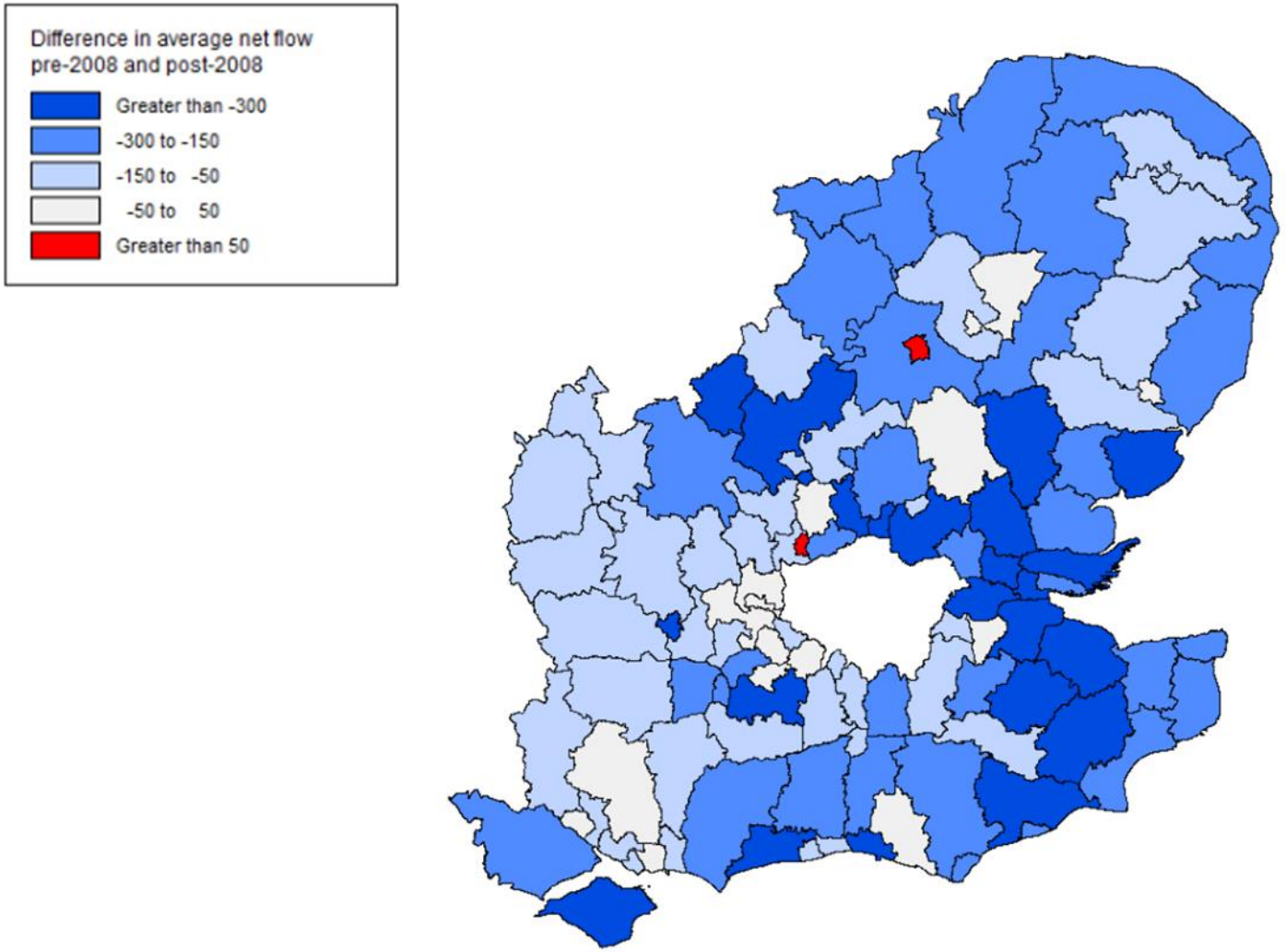


Pre-2008 (mid-2001 to mid-2008)



Post-2008 (mid-2008 to mid-2012)

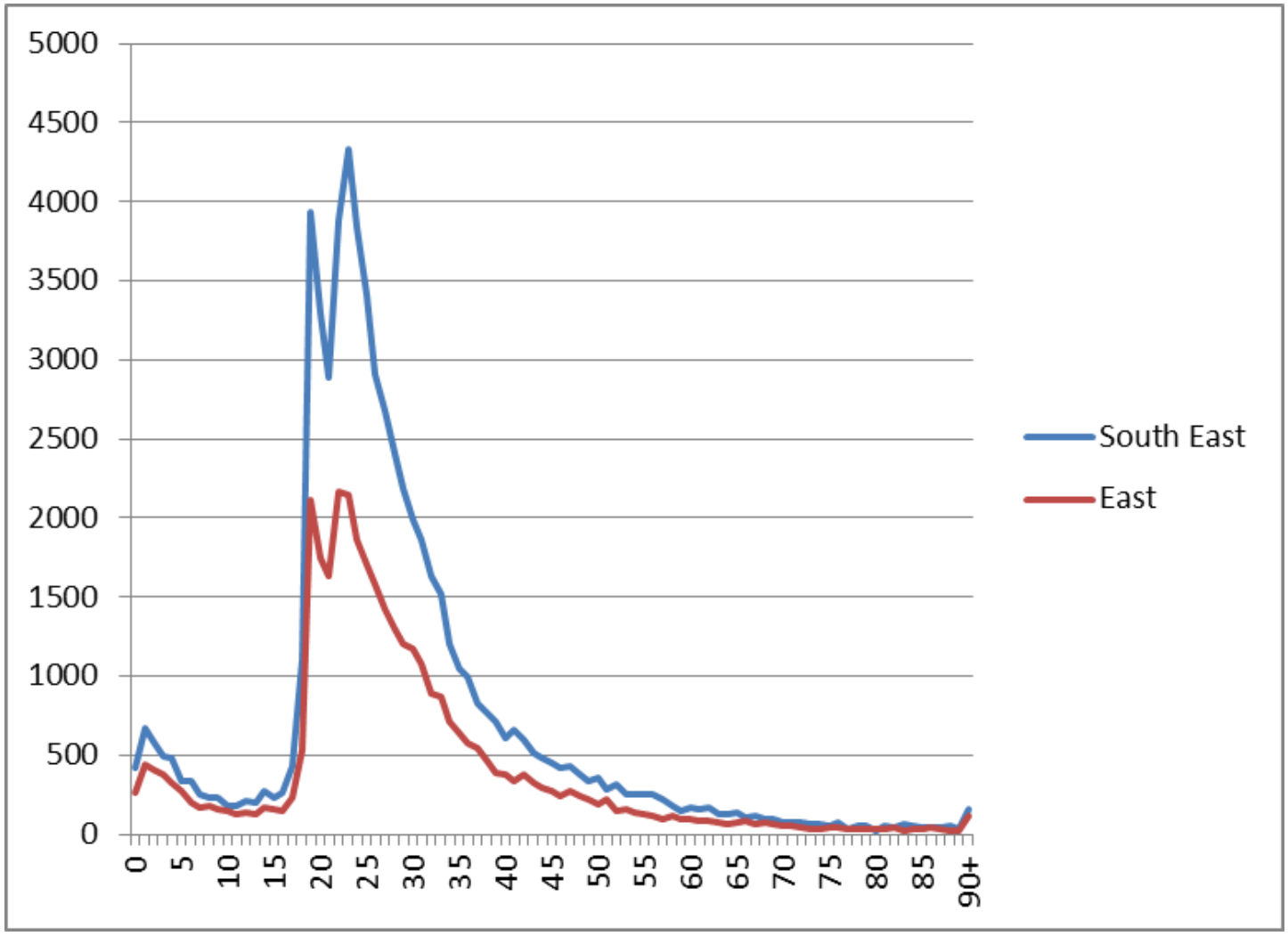
Change in net migration from London



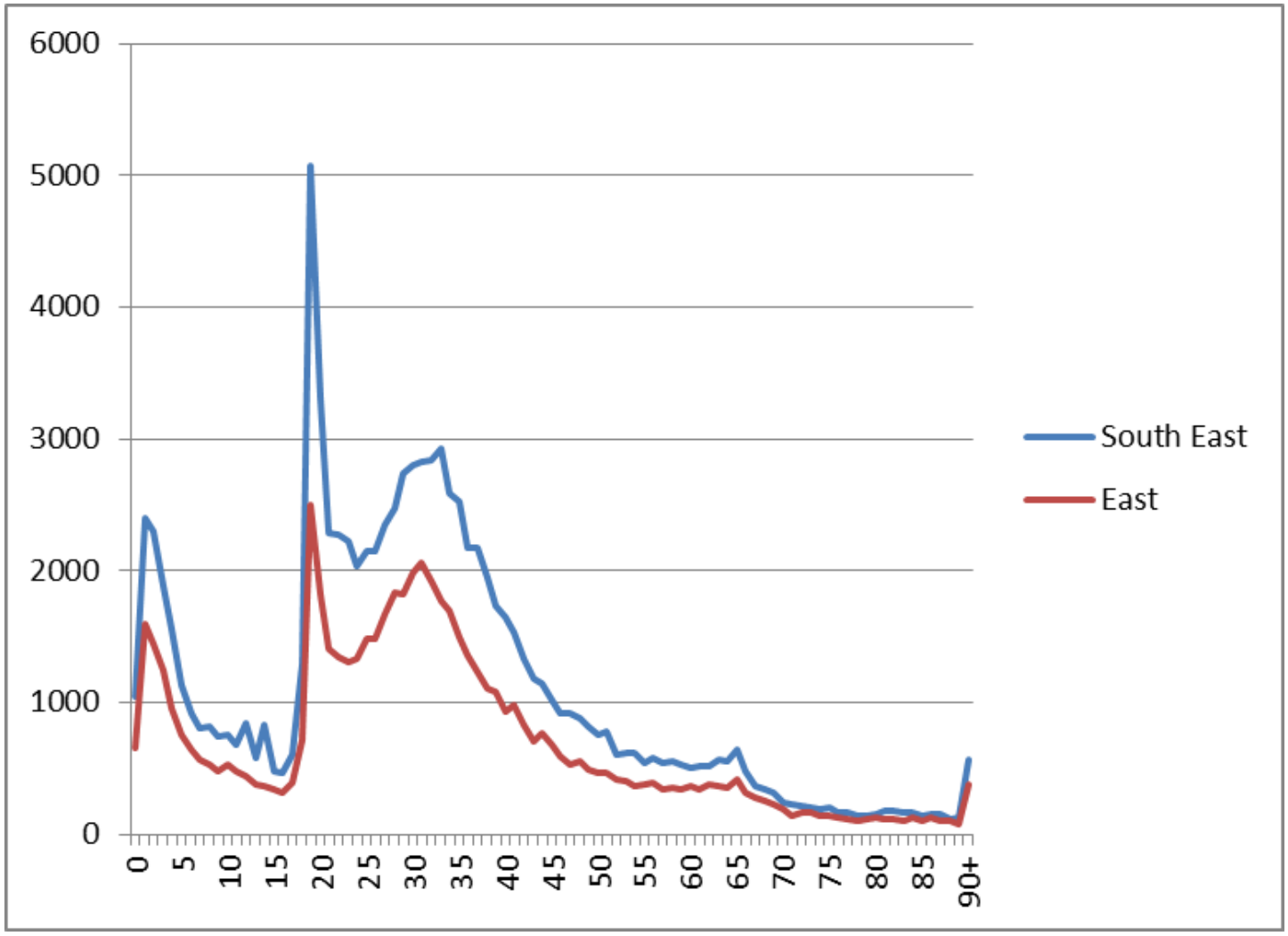
Wider regional context

- Majority of districts saw fall in net migration from London
- Age profile of in and outflows very different
- London net importer 20-27 year olds
- Net exporter of all other ages
  - i.e. prime household-forming ages

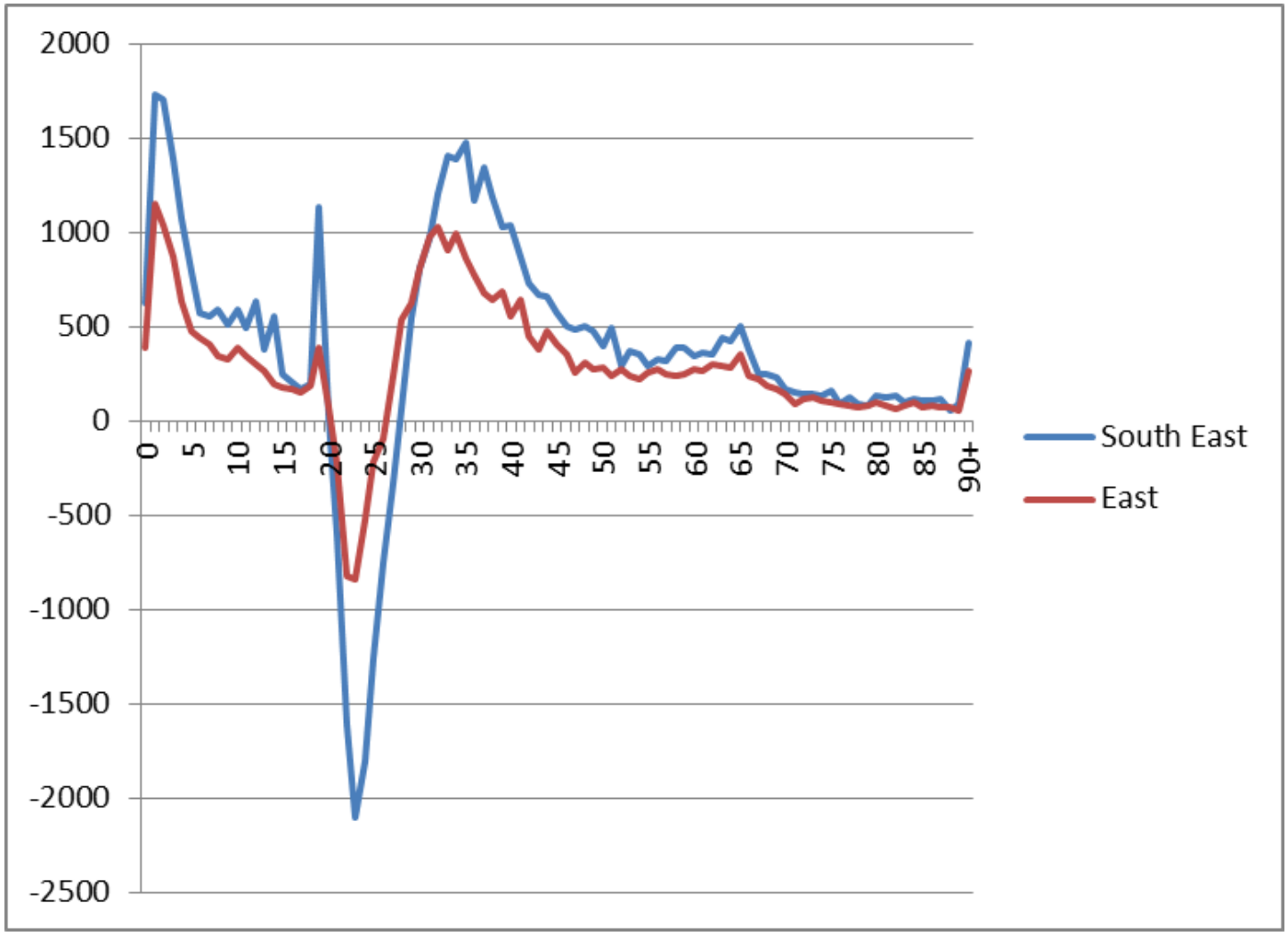
Flows to London



Flows from London



Net flows from London



- GLA has put together an Excel tool for RoSE
- For each district, shows:
  - past migration flows estimates to/from London
  - 2012 age characteristics of flows
- Hopefully provides some additional context for planners

Imminent data releases

26th June

- 2013 mid year estimates
- 2013 internal migration flows

Contact

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ben.corr@london.gov.uk

See also

- http://data.london.gov.uk/datastorefiles/documents/GLA-SNPP-consultation-response.pdf
- http://data.london.gov.uk/datastore/package/ons-2012-based-subnational-population-projections
- http://www.london.gov.uk/sites/default/files/FALP%20SHMA%202013_0.pdf

Net flow from London to districts in the East region

District	County	mid-2001 to mid-2002	mid-2002 to mid-2003	mid-2003 to mid-2004	mid-2004 to mid-2005	mid-2005 to mid-2006	mid-2006 to mid-2007	mid-2007 to mid-2008	mid-2008 to mid-2009	mid-2009 to mid-2010	mid-2010 to mid-2011	mid-2011 to mid-2012	Average to mid-2008	Average post mid-2008
Bedford	Bedfordshire	280	380	410	250	200	150	190	80	90	269	144	266	146
Central Bedfordshire (pre-2009 covers Mid Bedfordshire and South Bedfordshire)	Bedfordshire	1,160	1,150	1,210	970	840	1,040	820	410	560	652	655	1,027	569
Luton	Bedfordshire	950	960	720	660	490	510	520	360	370	572	851	687	538
Cambridge	Cambridgeshire	-1,260	-1,060	-900	-1,030	-1,330	-1,260	-1,250	-1,210	-860	-854	-586	-1,156	-878
East Cambridgeshire	Cambridgeshire	150	170	220	150	210	170	130	80	100	-7	52	171	56
Fenland	Cambridgeshire	430	570	600	380	280	370	280	110	120	107	135	416	118
Huntingdonshire	Cambridgeshire	460	610	500	450	350	340	360	80	140	160	220	439	150
City of Peterborough	Cambridgeshire	260	410	360	170	30	10	50	-110	-120	-50	-3	184	-71
South Cambridgeshire	Cambridgeshire	300	340	430	220	220	210	220	60	120	104	87	277	93
Basildon	Essex	1,680	1,530	1,990	1,590	1,520	1,590	1,530	670	750	998	1,177	1,633	899
Braintree	Essex	1,190	1,080	1,210	1,000	980	1,040	820	400	550	467	557	1,046	494
Brentwood	Essex	1,240	1,190	1,320	1,130	1,090	1,250	1,110	910	1,000	968	987	1,190	966
Castle Point	Essex	910	1,090	1,110	920	740	920	820	500	480	448	541	930	492
Chelmsford	Essex	1,120	1,170	1,600	1,030	820	1,000	870	600	640	752	684	1,087	669
Colchester	Essex	440	730	820	570	570	530	510	350	360	413	339	596	365
Epping Forest	Essex	2,330	2,130	2,550	2,310	2,500	2,530	2,300	1,890	1,830	1,693	2,219	2,379	1,908
Harlow	Essex	560	630	600	570	480	710	700	550	500	451	541	607	510
Maldon	Essex	490	500	560	450	370	460	410	300	240	199	298	463	259
Rochford	Essex	720	640	870	640	580	600	650	280	370	219	425	671	323
Southend-on-Sea	Essex	920	920	990	760	820	1,100	1,200	630	620	696	879	959	706
Tendring	Essex	2,080	1,890	2,090	1,540	1,550	1,680	1,490	1,000	950	796	914	1,760	915
Thurrock	Essex	2,460	2,570	2,750	2,470	2,150	2,220	2,200	1,680	1,450	1,683	2,051	2,403	1,716
Uttlesford	Essex	450	570	620	450	470	600	520	490	630	472	488	526	520
Broxbourne	Hertfordshire	1,650	1,730	1,790	1,960	1,890	2,040	1,830	1,430	1,380	1,235	1,671	1,841	1,429
Dacorum	Hertfordshire	870	1,210	1,040	870	930	920	980	650	890	837	1,044	974	855
East Hertfordshire	Hertfordshire	1,030	1,090	1,100	1,000	1,140	1,150	1,160	820	960	891	1,094	1,096	941
Hertsmere	Hertfordshire	2,030	1,930	2,030	2,070	2,040	2,370	2,130	1,570	1,700	1,871	2,048	2,086	1,797
North Hertfordshire	Hertfordshire	720	910	740	610	620	570	700	410	580	491	745	696	557
St. Albans	Hertfordshire	1,330	1,170	1,370	1,150	1,330	1,410	1,240	1,000	1,350	1,250	1,593	1,286	1,298
Stevenage	Hertfordshire	470	550	560	470	400	370	420	340	210	355	249	463	288
Three Rivers	Hertfordshire	1,340	1,240	1,260	1,200	1,250	1,460	1,450	1,120	1,050	1,006	1,489	1,314	1,166
Watford	Hertfordshire	920	1,090	970	830	760	1,090	1,310	1,030	1,140	1,209	1,560	996	1,235
Welwyn Hatfield	Hertfordshire	1,460	1,490	1,400	1,550	1,400	1,330	1,080	960	1,010	636	454	1,387	765
Breckland	Norfolk	490	510	530	340	310	370	250	220	160	213	130	400	181
Broadland	Norfolk	180	260	200	100	120	140	80	60	70	10	110	154	63
Great Yarmouth	Norfolk	390	400	410	290	260	230	190	150	170	134	107	310	140
King's Lynn and West Norfolk	Norfolk	550	550	530	400	350	370	300	220	120	151	141	436	158
North Norfolk	Norfolk	380	400	440	310	270	250	240	110	150	137	150	327	137
Norwich	Norfolk	-30	90	70	30	-20	-140	-110	-200	-50	-149	-72	-16	-118
South Norfolk	Norfolk	370	310	300	210	170	200	200	40	130	116	120	251	102
Babergh	Suffolk	230	290	300	190	200	240	140	50	170	179	109	227	127
Forest Heath	Suffolk	110	130	110	90	90	60	110	40	130	108	81	100	90
Ipswich	Suffolk	140	140	210	100	20	120	60	110	210	25	-9	113	84
Mid Suffolk	Suffolk	240	250	340	240	260	210	170	150	180	105	92	244	132
St. Edmundsbury	Suffolk	320	250	350	220	160	310	220	120	150	44	74	261	97
Suffolk Coastal	Suffolk	370	430	420	290	350	320	230	100	230	129	169	344	157
Waveney	Suffolk	520	410	490	350	270	360	240	200	120	142	180	377	161

Source: ONS, internal migration

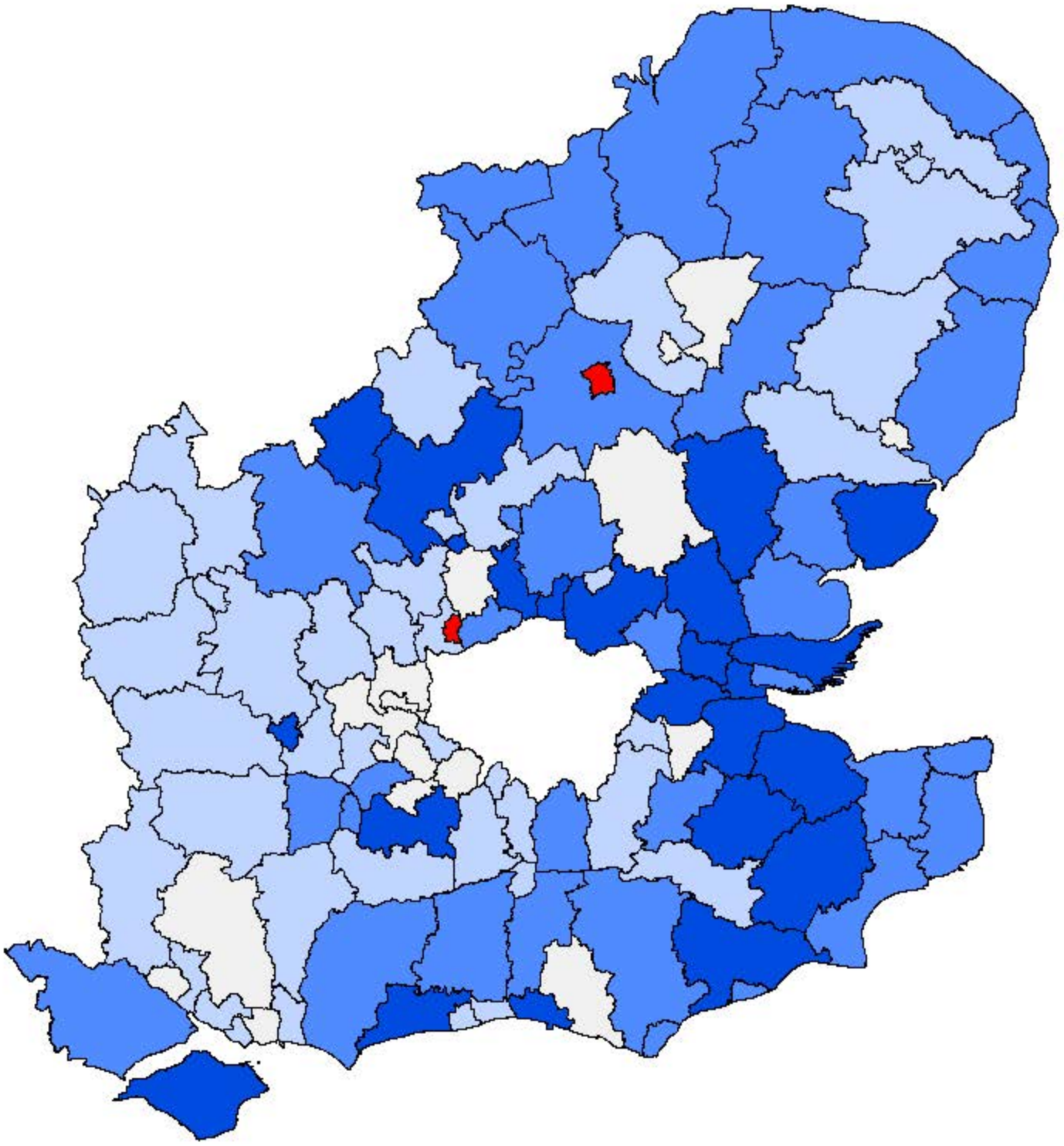
Net flow from London to districts in the Southeast region

District	County	mid-2001 to mid-2002	mid-2002 to mid-2003	mid-2003 to mid-2004	mid-2004 to mid-2005	mid-2005 to mid-2006	mid-2006 to mid-2007	mid-2007 to mid-2008	mid-2008 to mid-2009	mid-2009 to mid-2010	mid-2010 to mid-2011	mid-2011 to mid-2012	Average to mid-2008	Average post mid-2008
Bracknell Forest	Berkshire	380	550	600	320	440	390	350	280	230	325	325	433	290
Reading	Berkshire	-110	60	60	-90	-160	-290	-280	-410	-610	-678	-313	-116	-503
Slough	Berkshire	760	740	920	940	940	1,170	1,260	850	770	1,149	1,044	961	953
West Berkshire	Berkshire	220	260	420	440	230	270	290	120	290	183	247	304	210
Windsor and Maidenhead	Berkshire	630	830	880	630	800	830	890	600	910	725	789	784	756
Wokingham	Berkshire	240	410	550	400	430	460	380	320	210	259	358	410	287
Aylesbury Vale	Buckinghamshire	690	600	730	540	570	530	500	240	430	423	522	594	404
Chiltern	Buckinghamshire	790	960	1,070	940	1,100	1,150	940	820	1,020	704	1,117	993	915
Milton Keynes	Buckinghamshire	1,260	1,410	1,170	970	800	700	820	610	630	444	610	1,019	573
South Bucks	Buckinghamshire	670	740	880	760	890	1,010	1,060	800	870	818	994	859	871
Wycombe	Buckinghamshire	690	770	760	660	690	830	640	280	650	716	930	720	644
The City of Brighton and Hove	East Sussex	1,790	1,720	1,760	1,130	1,230	840	930	420	470	501	487	1,343	469
Eastbourne	East Sussex	650	720	680	510	510	590	390	210	260	408	291	579	292
Hastings	East Sussex	840	950	630	640	560	630	690	520	390	303	428	706	410
Lewes	East Sussex	470	400	680	470	370	380	430	390	420	366	474	457	413
Rother	East Sussex	910	720	820	660	540	770	650	360	470	418	431	724	420
Wealden	East Sussex	750	940	790	700	650	560	540	150	500	484	623	704	439
Basingstoke and Deane	Hampshire	290	330	330	420	300	340	290	310	250	213	139	329	228
East Hampshire	Hampshire	210	240	410	140	300	280	250	110	290	184	177	261	190
Eastleigh	Hampshire	50	140	100	80	60	40	50	20	20	-35	-23	74	-5
Fareham	Hampshire	110	160	80	90	20	130	140	10	20	-59	66	104	9
Gosport	Hampshire	140	120	110	100	120	80	100	30	-10	32	48	110	25
Hart	Hampshire	330	290	490	280	430	300	220	90	190	194	138	334	153
Havant	Hampshire	140	140	140	180	130	100	170	60	90	44	100	143	74
New Forest	Hampshire	610	520	520	440	460	440	400	270	230	251	215	484	241
City of Portsmouth	Hampshire	50	250	300	330	30	-120	140	80	380	32	-41	140	113
Rushmoor	Hampshire	200	210	180	280	530	230	210	20	60	163	59	263	75
City of Southampton	Hampshire	-270	-220	-210	-290	-390	-450	-440	-430	-370	-344	-230	-324	-344
Test Valley	Hampshire	210	240	250	220	130	120	120	0	50	135	26	184	53
Winchester	Hampshire	270	300	360	240	210	280	290	260	250	265	300	279	269
Isle of Wight	Isle of Wight	740	710	790	610	480	540	490	310	230	279	268	623	272
Ashford	Kent	960	850	890	790	750	520	330	210	280	438	605	727	383
Canterbury	Kent	880	1,100	1,140	660	630	710	420	340	660	440	808	791	562
Dartford	Kent	1,310	1,440	1,580	1,490	1,400	1,350	1,950	1,430	1,150	1,271	1,791	1,503	1,410
Dover	Kent	250	330	370	240	220	330	210	130	160	141	80	279	128
Gravesham	Kent	440	600	640	530	630	680	620	510	520	552	863	591	611
Maidstone	Kent	860	830	810	700	700	770	650	390	350	433	511	760	421
Medway	Kent	1,940	2,170	2,070	1,670	1,480	1,480	1,780	1,100	970	1,243	1,667	1,799	1,245
Sevenoaks	Kent	1,460	1,590	1,600	1,540	1,670	1,780	1,680	1,270	1,550	1,703	1,649	1,617	1,543
Shepway	Kent	710	600	630	520	450	460	330	250	430	346	447	529	368
Swale	Kent	1,020	1,090	930	830	710	840	820	620	520	446	619	891	551
Thanet	Kent	1,060	870	920	690	630	930	720	540	650	591	865	831	661
Tonbridge and Malling	Kent	1,140	1,080	1,250	920	970	1,070	1,100	730	810	832	1,020	1,076	848
Tunbridge Wells	Kent	650	620	900	550	710	1,020	890	500	680	769	851	763	700
Cherwell	Oxfordshire	190	290	370	260	110	160	140	60	80	59	206	217	101
Oxford	Oxfordshire	-1,840	-1,380	-1,310	-1,350	-1,710	-1,610	-1,860	-2,010	-1,640	-1,635	-1,399	-1,580	-1,671
South Oxfordshire	Oxfordshire	340	530	470	390	430	370	400	340	260	308	313	419	305
Vale of White Horse	Oxfordshire	100	170	130	160	30	80	40	-60	10	10	1	101	-10
West Oxfordshire	Oxfordshire	100	270	250	220	270	220	130	100	170	150	58	209	120
Elmbridge	Surrey	2,320	2,080	2,050	1,900	2,270	2,250	1,640	1,670	2,240	2,113	2,441	2,073	2,116
Epsom and Ewell	Surrey	1,300	900	1,120	890	1,120	1,470	1,030	600	1,070	903	1,307	1,119	970
Guildford	Surrey	300	430	640	350	490	560	500	50	120	149	86	467	101
Mole Valley	Surrey	700	710	580	520	680	720	730	530	590	520	779	663	605
Reigate and Banstead	Surrey	1,520	1,710	1,620	1,350	1,670	2,080	1,780	1,520	1,690	1,375	1,616	1,676	1,550
Runnymede	Surrey	290	420	520	410	310	540	370	260	530	264	424	409	369
Spelthorne	Surrey	1,390	1,440	1,320	1,330	1,250	1,610	1,610	1,200	1,290	1,306	1,423	1,421	1,305
Surrey Heath	Surrey	350	370	510	380	390	380	360	220	200	186	152	391	189
Tandridge	Surrey	1,380	1,450	1,250	1,150	1,460	1,600	1,320	1,070	1,030	1,103	1,164	1,373	1,092
Waverley	Surrey	500	630	800	610	780	790	680	490	620	699	568	684	594
Woking	Surrey	410	510	570	590	600	570	700	430	570	628	601	564	557
Adur	West Sussex	170	130	130	90	100	120	120	60	70	60	59	123	62
Arun	West Sussex	1,280	1,150	1,050	740	850	850	760	390	400	404	575	954	442
Chichester	West Sussex	620	580	670	490	570	480	540	300	440	385	395	564	380
Crawley	West Sussex	230	450	420	190	150	250	330	180	260	223	285	289	237
Horsham	West Sussex	540	690	640	410	530	450	410	200	400	341	330	524	318
Mid Sussex	West Sussex	630	710	910	650	620	750	510	410	550	504	608	683	518
Worthing	West Sussex	380	440	370	180	320	320	260	220	110	272	278	324	220

Source: ONS, internal migration

Difference in average net flow pre-2008 and post-2008

Net flows = flows to districts from London minus flows from districts to London

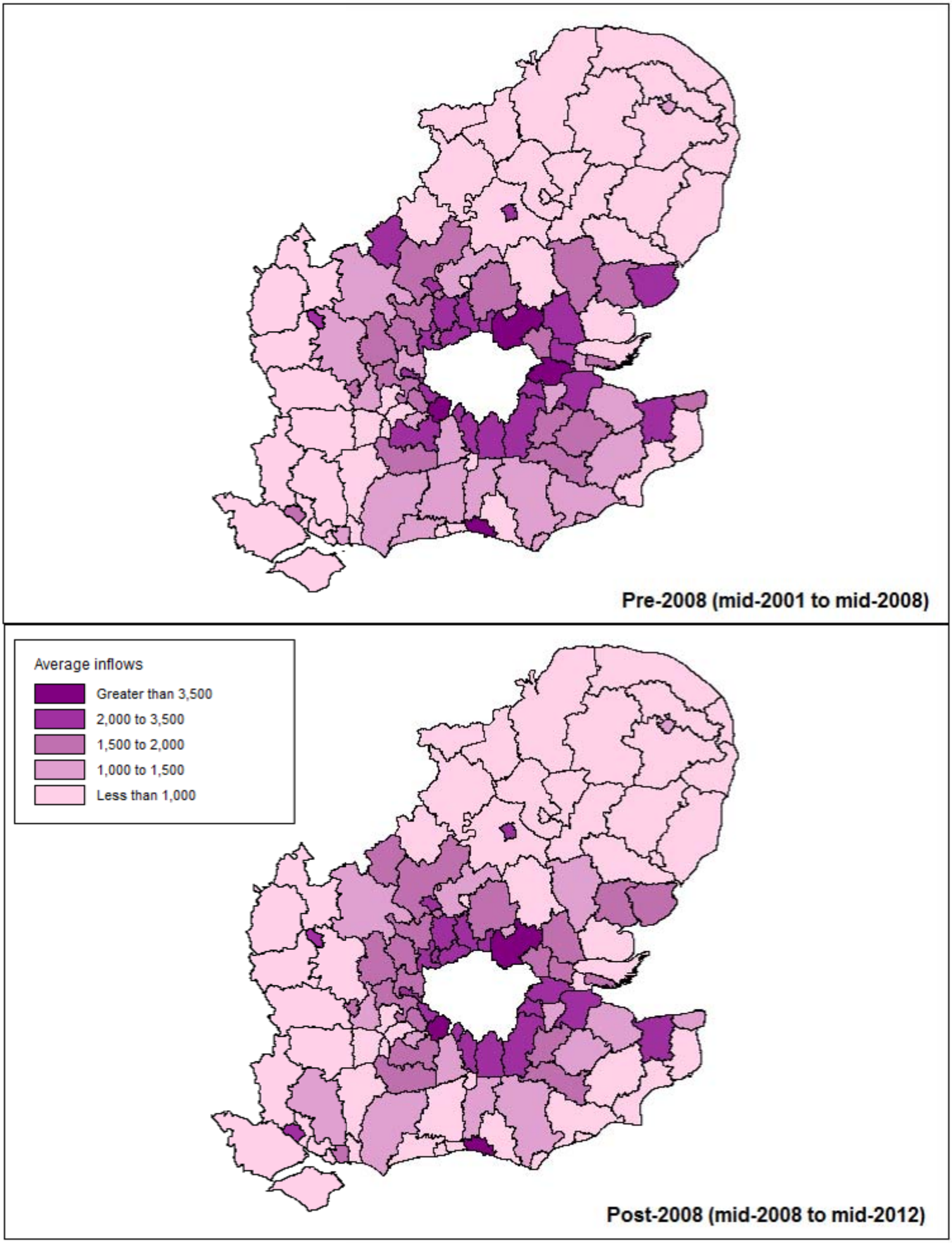


Difference in average net flow pre-2008 and post-2008

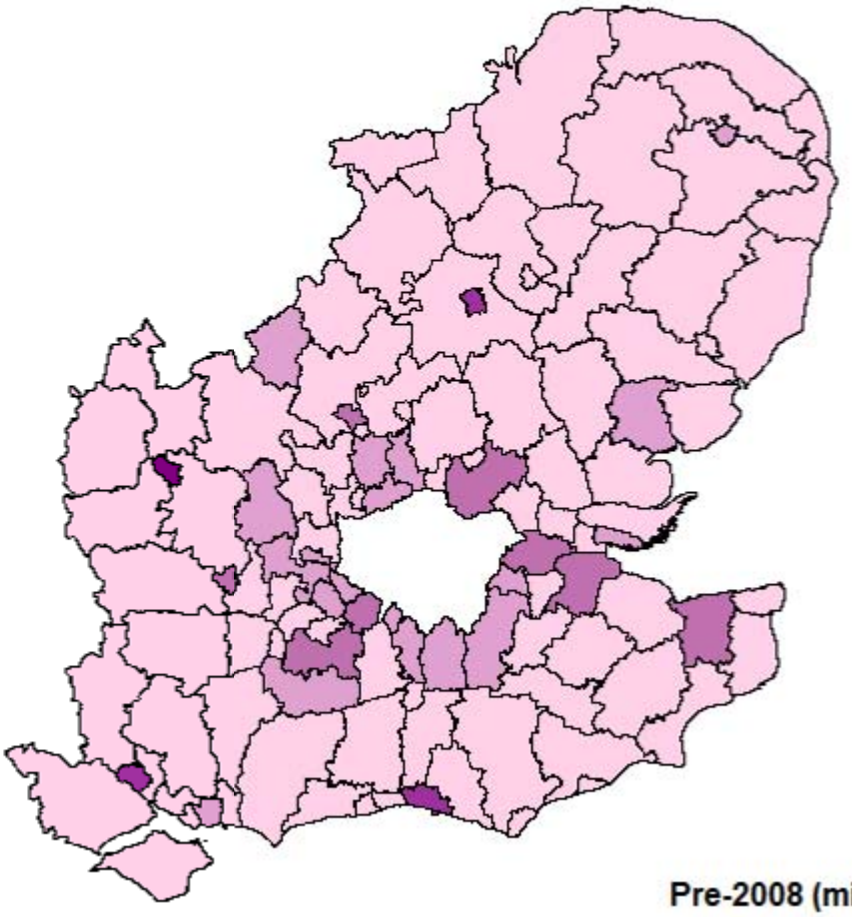
- Greater than -300
- -300 to -150
- -150 to -50
- -50 to 50
- Greater than 50

Pre-2008 covers mid-2001 to mid-2008
Post-2008 covers mid-2008 to mid-2012
Negative value = average net flow post-2008 is less than pre-2008

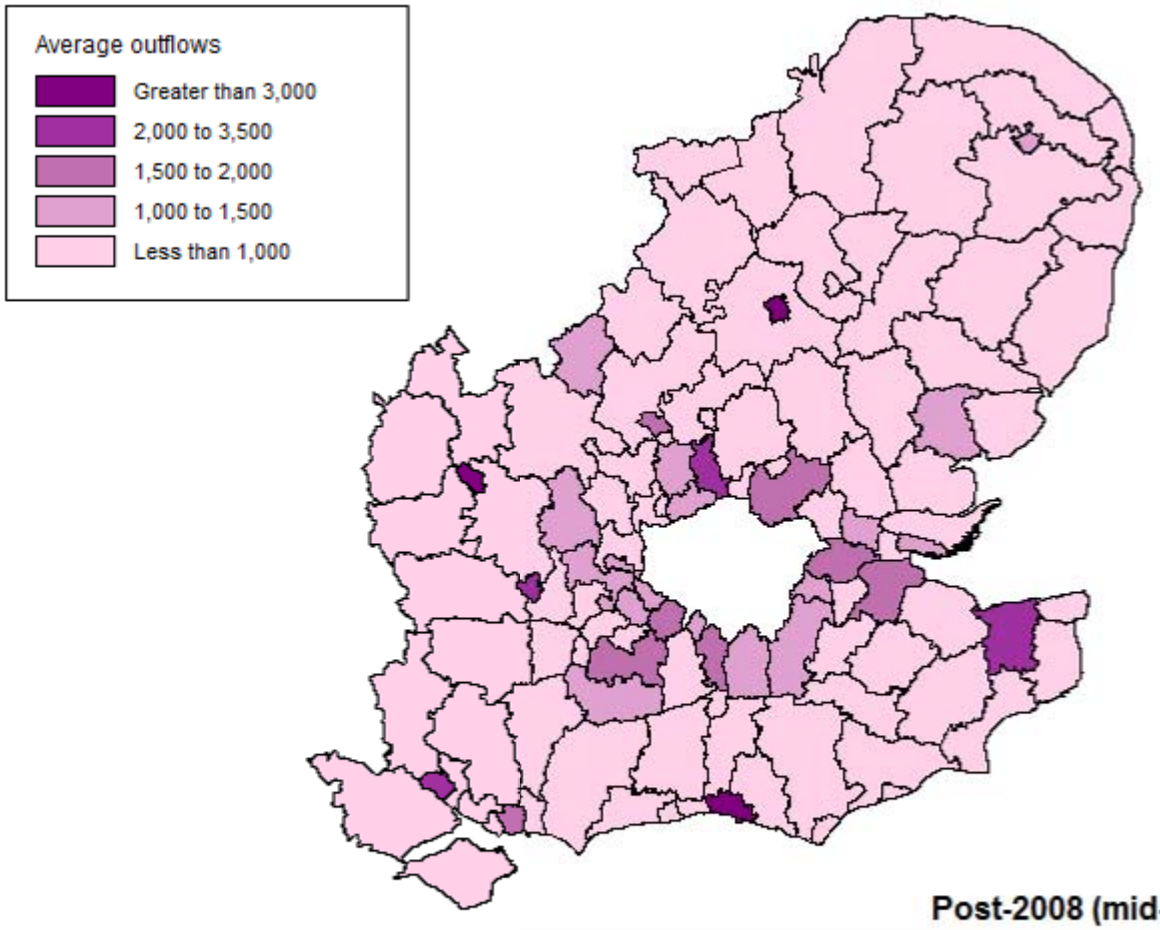
Average inflows to districts from London



Average outflows from districts to London



Pre-2008 (mid-2001 to mid-2008)



Post-2008 (mid-2008 to mid-2012)

Average net flows from London to districts