

**CENTRE  
FOR  
LONDON** | **THE  
LONDON  
INTELLIGENCE**

The [ninth edition](#) of The London Intelligence focuses exclusively on how London's population is changing over time, taking a fresh look at annual demography data.

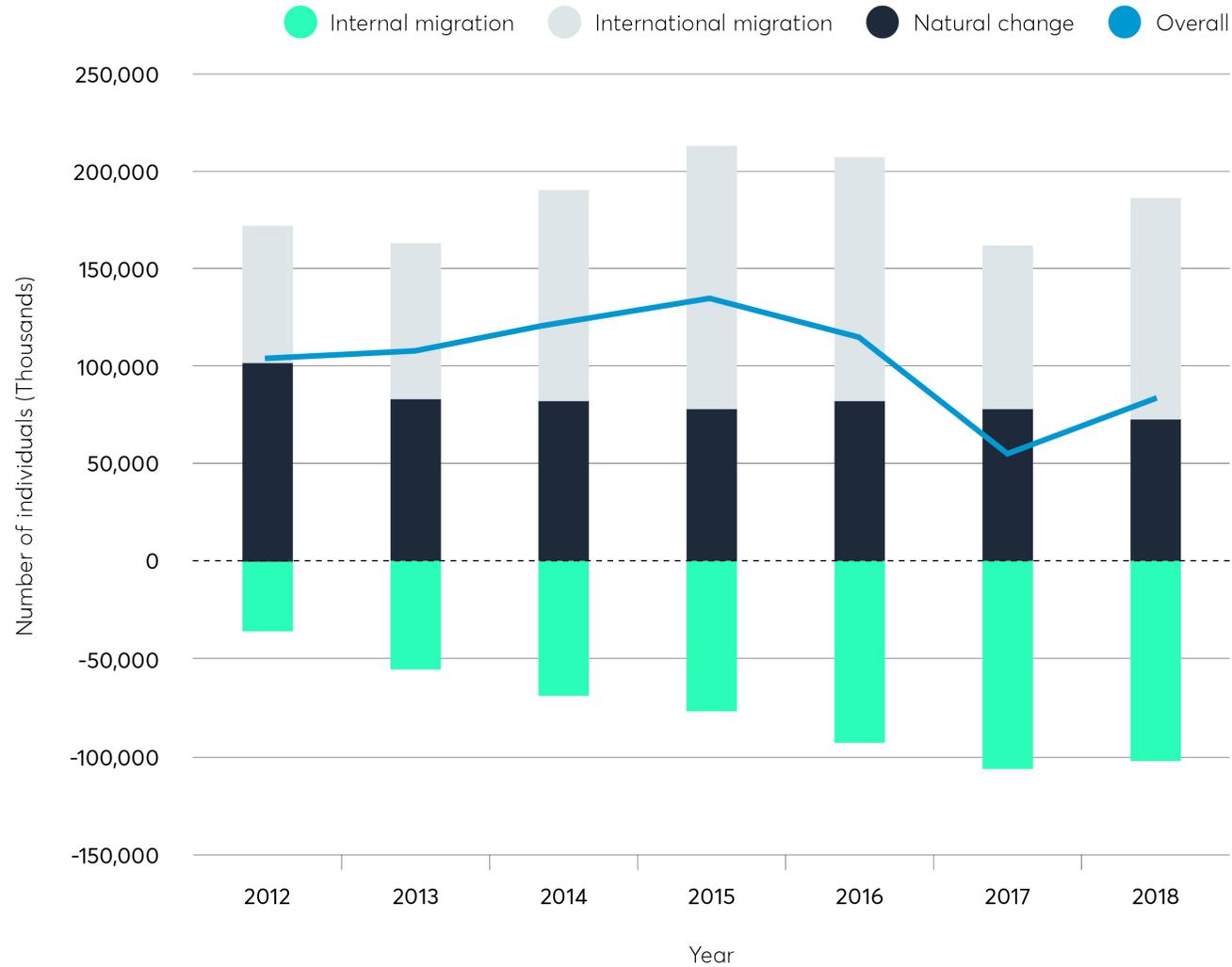
In the year to July 2018, [the capital's population grew by a modest one per cent](#) to 8.9 million people, driven by net international migration and natural change – in line with longer-term trends. While the number of people leaving London for elsewhere in the UK has crept up over the last couple years, this has been largely offset by the number of people coming into London from across the country.

Looking at population trends across the capital, [population in outer London grew at a slower pace than in inner London](#), and the boroughs that have seen the largest increase are not necessarily the densest. And though London's population has been aging, it remains the youngest region in the country.

While there was a big jump in National Insurance Number registrations in London by foreign nationals, much of this can be attributed to expanded operational capacity. Although EU registrations continue to outnumber non-EU ones, there has been a much bigger increase year-on-year increase in non-EU registrations than EU ones.



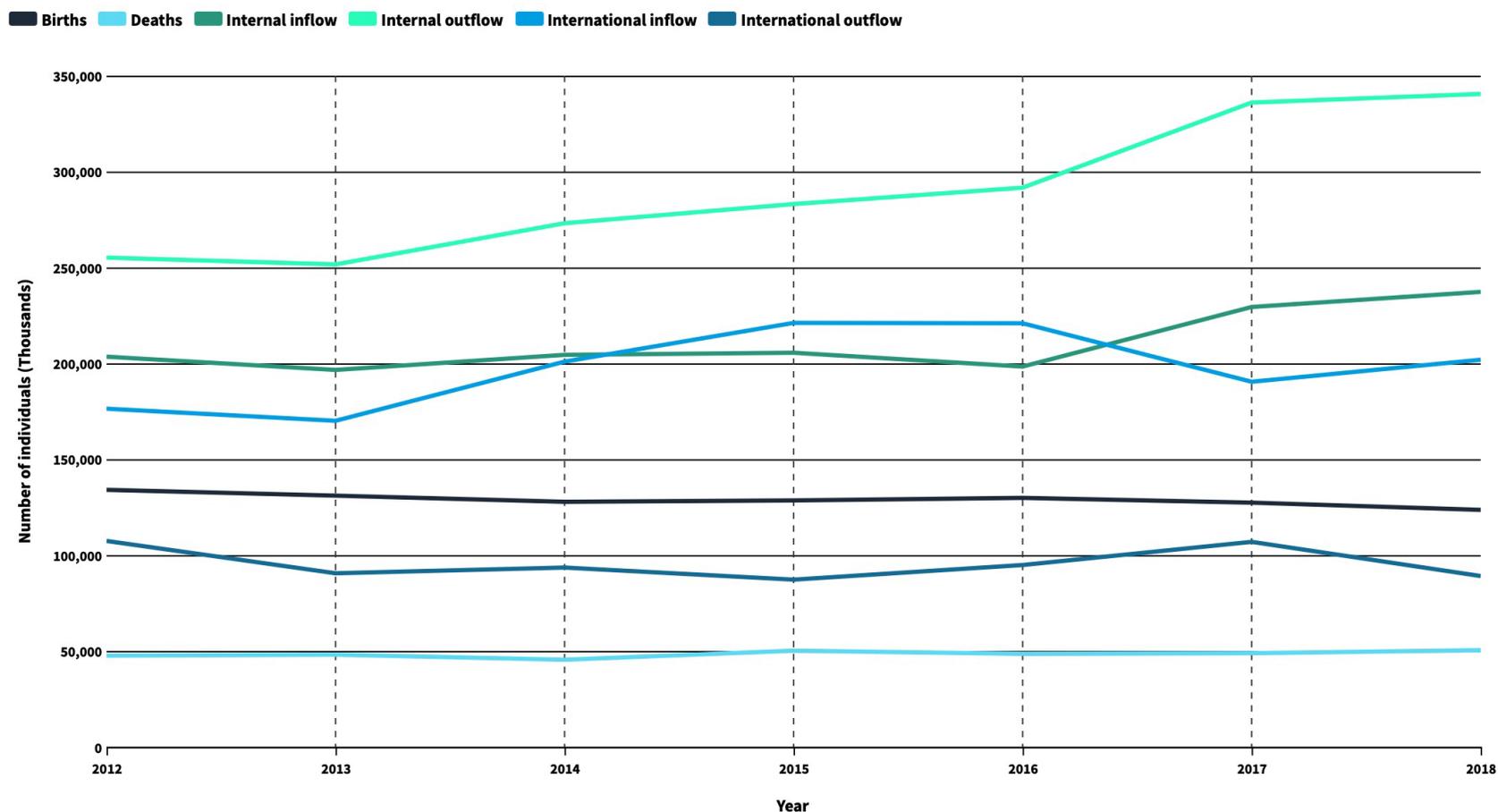
**Figure 1:**  
**Components of population change, net figures**



The capital's population continues to grow, expanding one per cent in the year to mid-2018 to 8.9 million, an increase of 83,000 people. This is a slightly higher rate of growth than in the previous year.

The growth is driven by a higher net international migration figure – a balance of 113,000 people moved to London from abroad in the year to June 2018, 35 per cent higher than the previous year. Specifically, there was a 6 per cent increase in the number of foreign nationals moving to the capital, combined with a 17 per cent drop in the number of people leaving London for abroad.

## Figure 2: Components of population change, mid-year



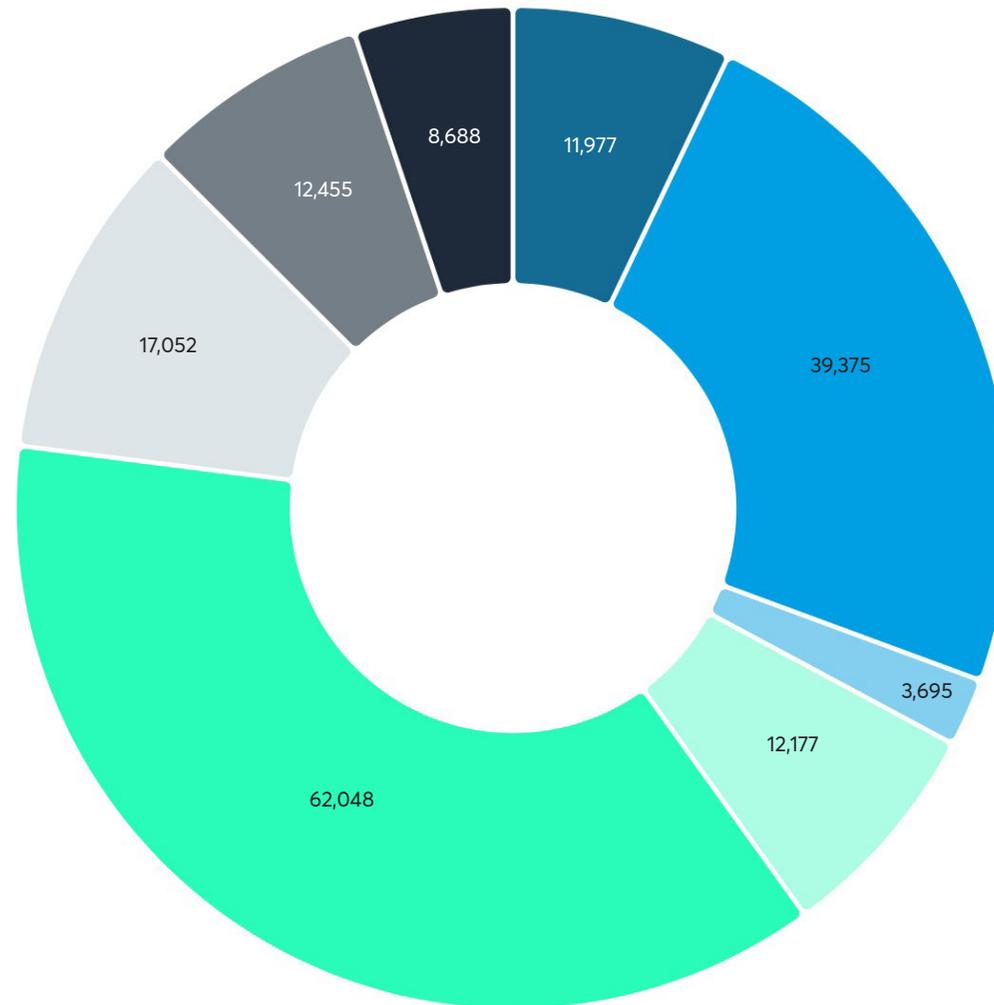
In contrast, net figures for both movements within the UK and natural change were lower than the previous year. While deaths increased by 6 per cent between 2012 and 2018, births declined by 8 per cent over the same period.

While internal inflow (the number of people moving to London from the rest of the UK) tends to track outflow (those leaving the capital for elsewhere in the UK), over the last six years the gap between people leaving and coming to London has become wider, with a third (33 per cent) more people leaving the capital in the year to June 2018 than in the year to June 2012, compared to a 14 per cent increase in the number of people coming from the rest of the UK.

Over the past year, however, internal outflow increased by a marginal one per cent (to 340,500 in mid-2018). However, this was offset by 240,000 more people moving to London in the same period, resulting in a net one per cent decline in internal migration.

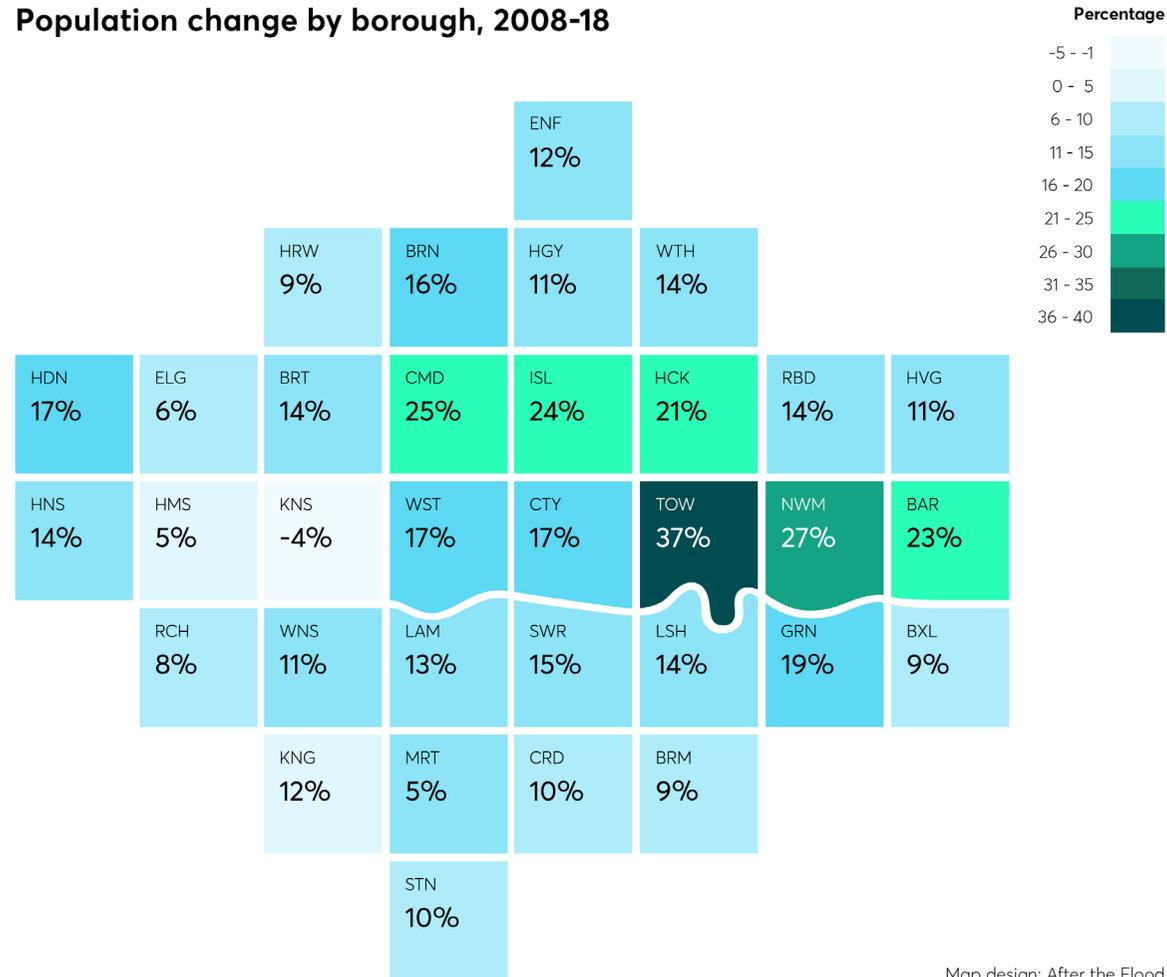
### Figure 3: Internal outflow destination, mid-2018

East Midlands East of England North East North West South East South West West Midlands Yorkshire and The Humber



While the wider South East and East of England remain the most popular destinations, with 37 and 24 per cent of people moving out of London heading for these regions respectively, regions further afield also receive a significant proportion of people moving out from the capital.

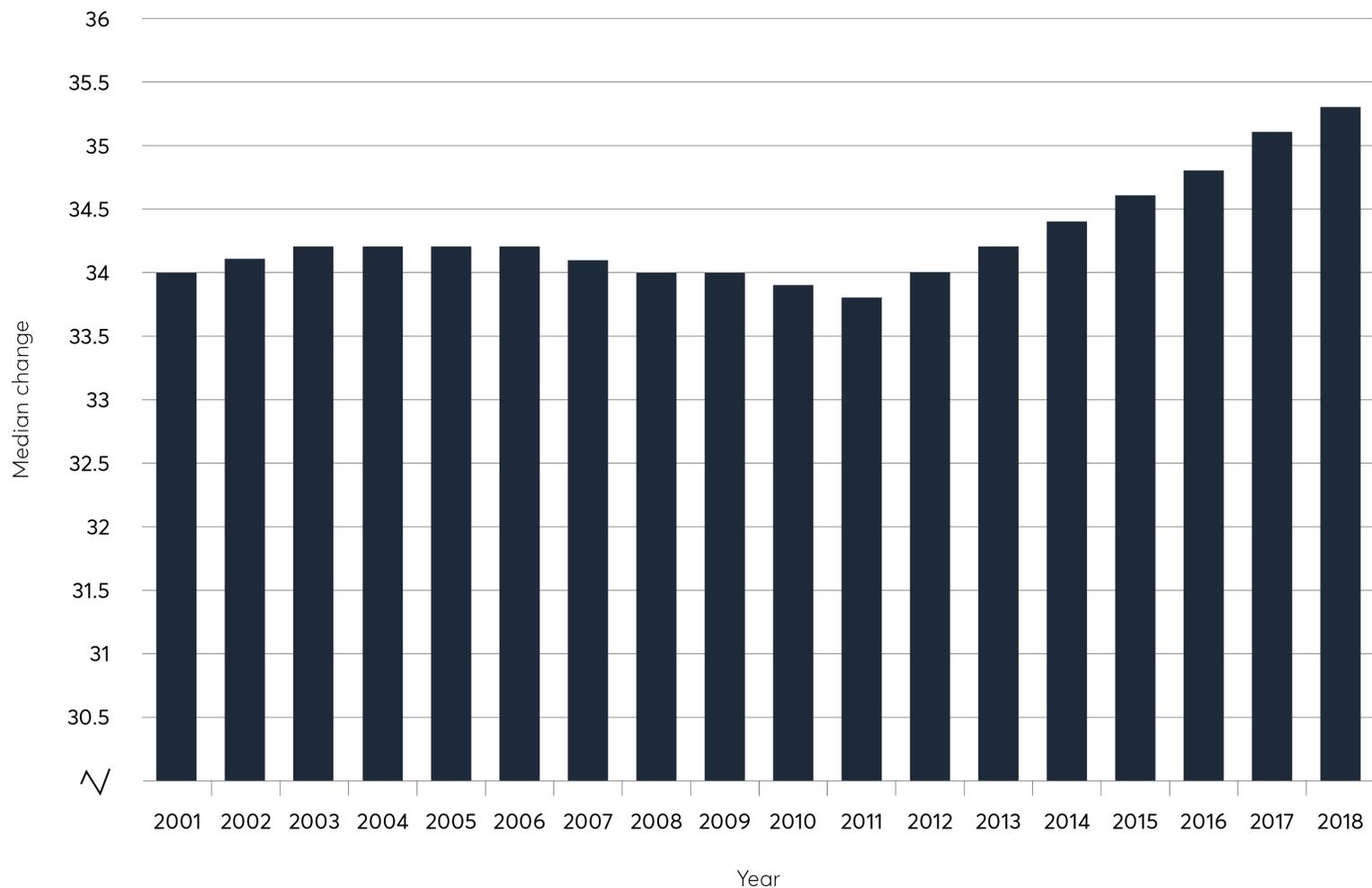
**Figure 4:**  
**Population change by borough, 2008-18**



Looking at population change at the local level over the longer term, population in outer boroughs grew slower than in inner London. Outer London saw an average increase of 12 per cent in the ten years to June 2018, while inner London grew by 17 per cent over the same period. Central and inner eastern London boroughs saw the largest share of population growth, with Tower Hamlets, Newham and Camden expanding 37, 27 and 25 per cent respectively.

Kensington and Chelsea was the only London borough to see its population decline, by 4 per cent, in ten years to mid-2018. Despite being the second smallest London borough (after City of London) with only 156,000 residents, it remains among one of the densest, with 13,000 residents per square km. Only Islington (16,000), Tower Hamlets (15,900) and Hackney (14,000) have higher density. By contrast, Barnet's 15 per cent population growth in ten years to mid-2018 makes it London's most populous borough, with 392,000 residents, but it remains one of the sparsest, with only 4,500 residents per square km.

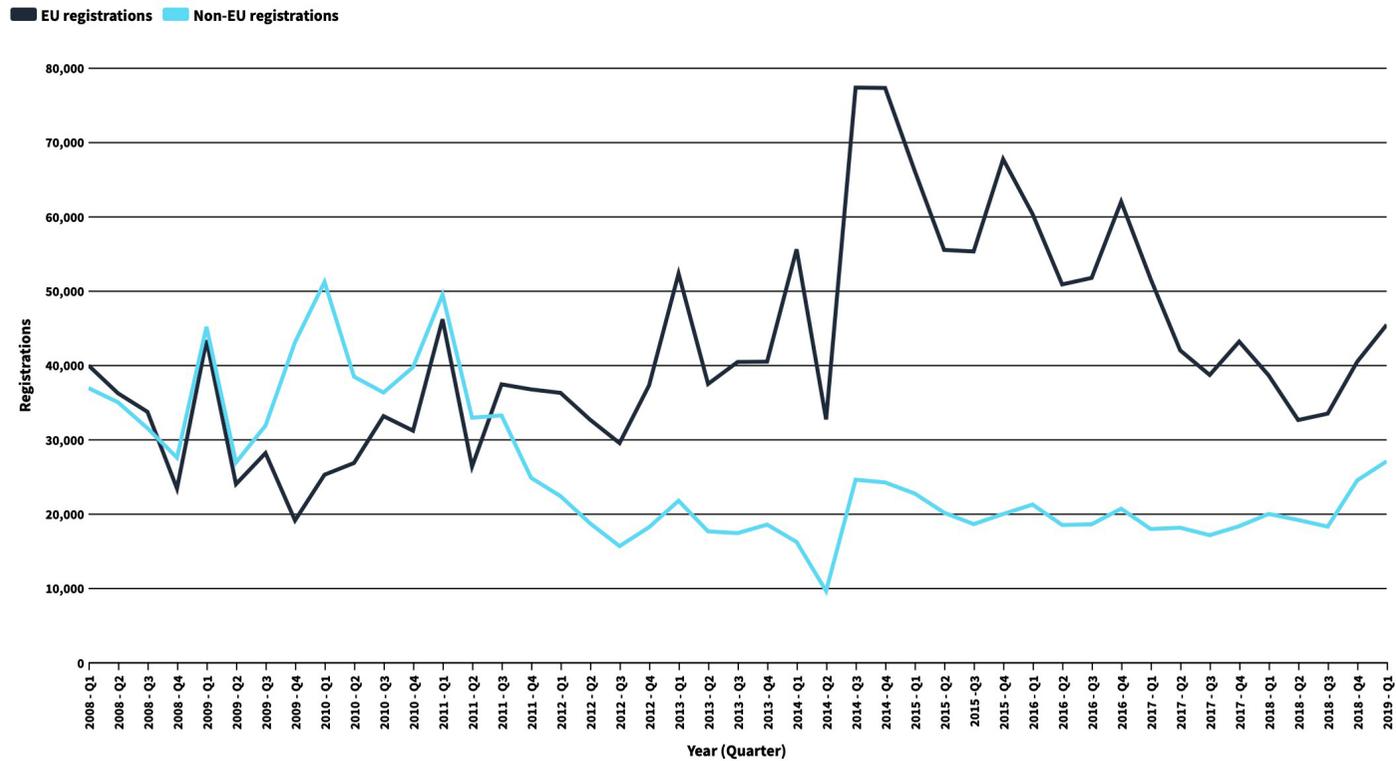
**Figure 5:**  
**Median age of population in London, mid-2001 to mid-2018**



Though London is ageing as a result of people living longer, it has aged at a slower rate than the rest of the country – the median population age in the capital increased by 5 per cent between mid-2001 and mid-2018, compared to 6 per cent for the UK average. As a result, London remains the youngest English region, with an average age of 35.3 years, compared to, for example, Greater Manchester with an average age of 37 years, and Tyne and Wear and Merseyside both with an average age of 40.

Taking a long-term view, London's median age saw a modest decline between mid-2006 and mid-2011 from 34.2 to 33.8, with one possible explanation being a decline in the number of families moving out of the capital, and therefore an increase in the number of children and young people living here. By 2012, however, the birth rate had stopped rising, thereby pushing the average age back up to 2018's levels.

**Figure 6: NINo registrations for London, EU and non-EU**



National Insurance Number (NINo) registrations issued to adult overseas nationals show the number of foreign nationals who registered to work or claim benefits in London during the year – and add another perspective on how London’s population and workforce are changing.

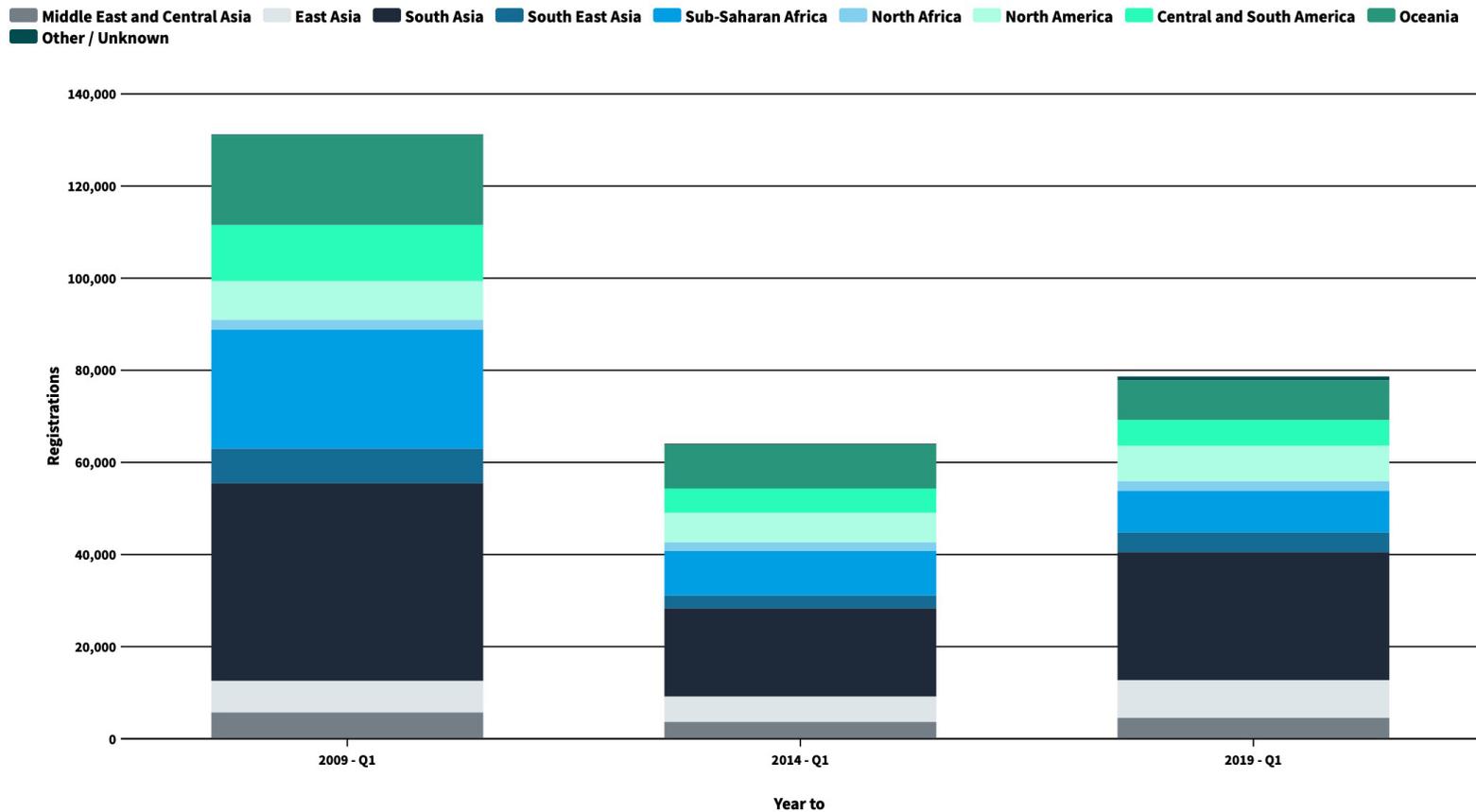
In Q1 2019, there were a total of 72,500 registrations of foreign nationals. This was the highest total number since Q4 2016 and represents a 24 per cent increase on Q1 2018, the highest year-on-year percentage increase since Q2 2015.

However, quarterly numbers can vary for a number of reasons. The sharp increase in registrations in the last quarter, for example, can be attributed to increased operational activity generated by the opening of two new processing centres at the end of last year, whereas figures for earlier in 2018 would have been lower due to a backlog in issuing NINo’s.

Looking at rolling annual registrations instead provides a smoother picture. Annual registrations have been declining since the year to Q4 2016, but the year to Q1 2019 represented a reversal of this trend, with a two per cent increase in registrations. While NINo’s only measure arriving not departing workers, this chimes with the overall decline in international immigration to London between mid-2016 and mid-2017 and a slight increase to mid-2018 (See Figure 2).

In Q1 2019, 45,400 (63 per cent) of all NINo registrations in London were EU nationals. Registrations by EU nationals for the year to March 2019 were six per cent lower than for the year to March 2018, signalling continued Brexit uncertainty. Q1 2019 non-EU registrations were the highest they have been since 2011, at 27,000, and were 21 per cent higher in the year to March 2019 than they had been the previous year.

**Figure 7: Non-European NINo registrations for London by world region**



When looking at the origin of non-European NINo registrations in more detail, we see a shifting picture.

NINo’s issued to non-European nationals fell by half in the five years following the financial crash, from 131,000 registrations in the year to March 2009 to 64,000 in the year to March 2014, though they have subsequently recovered to nearer 78,500.

Over the decade, there has been a decline in the number of registrations from all regions except for East Asia, which continues to make the largest regional contribution to registrations from outside Europe. The sharpest declines between 2009 and 2019 have been from people from sub-Saharan Africa (65 per cent fewer registrations), Oceania (56 per cent fewer) and Central and South America (54 per cent fewer).

More recently, registrations issued to Indian nationals soared 77 per cent in the year to March 2019 when compared with the 12-months previously. The 21,000 registrations issued to this group in the first quarter of 2019 represent 77 per cent of the South Asian total for the year, signalling renewed efforts to fill staff shortages in London’s IT sector and NHS.

