the london collaborative

The Collaborative City Future Trends

The Collaborative City – Future Trends

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Introduction

This report accompanies the main London Collaborative report *The Collaborative City*, and offers an overview of the evidence used to develop our six scenarios of the future of London, and to provide vital input into our analysis of the challenges facing the capital.

In order to develop this evidence base we conducted a review of over 50 studies that examined, using different approaches, one or more aspect of the future of London or, where relevant, the future of the UK or indeed the world as a whole. The full list of studies included is contained in Appendix 1. Whilst this was not a comprehensive review, we have included data from a wide range of sources including the Cabinet Office Strategy Unit, Carnegie Trust, CBI, CLG, GLA, Government Office for Science, Housing Corporation, London First, London Health Observatory, LSE and the Work Foundation.

It is important to recognise that even the best projections and extrapolations are often wrong, and sometimes by a significant margin. Therefore as well as looking at 'hard' evidence about trends in climate change, for example, we made sure to include more 'visionary', imaginative and challenging analyses by leading thinkers.

Our review covered the following factors:

1. Demographic change
2. Economy and skills
3. Housing and infrastructure
4. Climate change and the environment
5. Technological innovation
6. Lifestyles and behaviours
7. Social cohesion/discord
8. Health and well-being

In order to test out our emerging picture of future trends, we presented an early outline draft of the evidence review, including the factors listed above, to a workshop attended by a number of experts with extensive experience of working in this field. The workshop was chaired by Geoff Mulgan of the Young Foundation. Among the participants were leading experts including Tony Travers, Paul Barker, David Albury, and Dermot Finch all of whom are advisers to the London Collaborative.

The remainder of this report offers an overview of the evidence relating to each of the factors noted above.

1. Demographic change

The sources used when examining demographic change include those from organizations such as the Office for National Statistics which study current and future trends in demographic change, and other, more policy-focused documents, from the Greater London Authority, Cabinet Office and others, which use statistical data to inform decision-making and build capacity for the future. Unlike the information on more general social trends, much of this data addresses London specifically.

Key predictions include the following:

- London's population estimated to grow from 7.51 million in 2006 to 8.05 million in 2016 and then to 8.33 million in 2026 - a rise mostly explained by natural change resulting from comparatively high numbers of births and low numbers of deaths1.
- The population of over-60s likely to increase by five per cent by 2021, due in the main to an increase among the 60-69 age group. This compares with a national increase of 14 per cent in the over-60s group. The numbers of 45-59 year olds residing in London are also expected to demonstrate high levels of growth2.
- The number of households is expected to increase by about a third of a million as a result of an increase in population and decrease in numbers of people living in each property[3].

London in the first decade of the 21st century

In 2006, the population of London was estimated by the Office for National Statistics to be 7,512.4 million. Between 1991 and 2005, the average London borough increased in population by over ten per cent[4], though the greatest concentration of growth has been in the centre and the boroughs to the south west.[5] A significant factor in this is international migration, with London a major destination for new residents. The birth and death rates, which in preceding years were significantly above and below the national averages respectively, were also contributory factors.[6]

Although, in common with the rest of the UK, London's population is ageing, it is very young by comparison with other regions, with an average age of 36 in a typical London borough.[7] This can be attributed, in part, to the high numbers of young

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[1] GLA (2006), *Scenario testing for the Further Alterations to the London Plan*, London: GLA

[2] GLA (2005), *Towards and Older People's Strategy for London*, London

[3] GLA (2004), *The London Plan,* London: GLA

[4] The Local Futures Group (2007), *The State of the Borough:*
An Economic, Social and Environmental Profile of the City of London, London

[5] GLA (2004), *The London Plan*, London: GLA.

[6] ONS (2004), Regional Trends, No.38

[7] The Local Futures Group (2007), *The State of the Boroughs:*

professionals moving to London to pursue a career, along with the fact that young men have constituted a high proportion of international immigrants into the city. The corollary of this is that London's population of retired people, as a proportion of its overall population, is lower than that of any other region of the UK.[8]

Approximately 30 per cent of Londoners are from black and ethnic minority communities, which include mainly white minority groups such as Irish and Cypriot communities. Three hundred languages are spoken by London's children. London also has the largest LGBT population in the country.[9]

GLA figures suggest that between 2006 and 2026 just three ethnic groups will represent over 55 per cent of London's overall population growth. These ethnic groups are the Black African ethnic group (set to rise by over 150,000 or 19 per cent growth in this ethnic group), the 'Other' ethnic group (a 144,000 rise or 18 per cent) and the Indian ethnic group (141,000 rise or 17.9 per cent growth)[10].

London's households are smaller than the national average, comprising 2.38 people, reflecting its comparatively high numbers of single young professionals and couples without children.[11]

Population growth

According to the publication *Planning for London's Growth*, London's population would grow to at least 8.15 million by 2016.[12] This is based on mid-year population estimates published by ONS over a decade, patterns of migration and natural change resulting from the decrease in deaths in proportion to births. Estimates taking figures of population growth from the turn of this century, however, suggested that this figure could be as high as 8.6 million. In 2007, however, based on revised population data, the projection for 2016 was revised downwards to 8.06 million. Most of this reduction occurred between 2001 and 2004 due to a short-term downturn in international net migration to London in 2003. Copied below are the factors considered in the development of the revised figures; the net migration *loss* is particularly stark:

- As a consequence of the 2005 LHCS significantly more growth is projected for East London and the Thames Gateway (51 per cent of the total between 2001 and 2016).

An Economic, Social and Environmental Profile of the City of London, London
[8] ONS (2004), Regional Trends, No.38
[9] GLA (2004), *The London Plan*, London: GLA.
[10] GLA Data Management and Analysis Group (2006), Interim Ethnic Group Population Projections.
[11] ONS (2004), Regional Trends, No.38
[12] GLA (2002), *Planning for London's Growth: A Statistical Basis for the Mayor's Spatial Development Strategy*, London: GLA.

- The number of births in London is projected to rise from 111,700 in 2003-04 to 120,000 in 2015-16
- The number of deaths is projected to decline from 56,500 in 2003-04 to 48,600 in 2015-16
- Natural Change rises from 55,200 in 2003-04 to 71,300 in 2015-16
- Net migration between 2001 and 2016 amounts to a loss from London of 206,000, equivalent to 13,800 a year, about the same as the loss estimated for 2003-04.[13]

Population age

GLA projections indicate that London's population of over-60s will increase by five per cent between 2001, when it was approximately 1.1 million, and 2021 – a much smaller increase than the 14 per cent rise predicted for this age group among the nation as a whole. The greatest rise is expected to be in the 60-69 age group, compensating for the initial decline among the numbers of 70-79-year-olds and constant decline among the over-80s.[14] According to the LDA Report, *London Futures*, the greatest growth will be in the number of older working-age Londoners, aged between 45 and 59.[15] Although the age profile will increase, the younger age profile of migrants moving to London to build their career, and the established trend of older people moving out to the south-east and east of England, is likely to keep the average age of the population comparatively young.

Among the UK population as a whole, around 16.5 per cent of people will be aged over 65 – the normal retirement age – by 2011, while approximately 41 per cent of the population will be of working age.[16]

Disability

Although London's population is ageing more slowly than elsewhere, it is still growing older, and with age comes an increase in cases of disability and ill-health. Approximately two-thirds of disability occurs in the over-60 age group: government estimates suggest that there are 530,000 disabled people in the 60-plus age range in London, with the number set to grow as the older population increases. Other social and medical developments are also likely to lead to the growth in numbers of people registering or self-identifying as disabled: medical advances which enable babies to survive life-threatening health problems at birth; better diagnosis and recognition of

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[13] GLA Data Management and Analysis Group (2005), *GLA 2005 Round Interim Demographic Projections* [online] http://www.london.gov.uk/gla/publications/factsandfigures/DMAG-Briefing2005-332005_round_interim_demographic_projections.pdf
[14] GLA (2005), *Towards and Older People's Strategy for London*, London
[15] London Development Agency (2004), *London Futures*, London: LDA
[16] Cabinet Office (2001), *Short Survey of Published Material on Key UK Trends: 2001-2011*, London

conditions like autism; and growing awareness of the wide range of conditions that have been classified as 'disability'.[17]

Households

GLA estimates are that there are expected to be approximately 3.4 million households in London in 2016, up more than 330,000 on the number in 2001.[18] According to a 2003 report by the Office for the Deputy Prime Minister, cited by Berkeley Hanover Consulting, the average household in London will drop to 2.13 people by 2026.[19] More people in middle age are living alone following divorce, marriage break-ups and from personal choice. Older people, particularly women and members of the LGBT community, are currently more likely to live alone.[20] This trend may continue, but the gradual evening of the gender balance among the 'baby boomers' and the increased social acceptance of same-sex relationships may prompt a decline in this trend.

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[17] London Development Agency (2004), *London Futures*, London: LDA
[18] GLA (2004), *The London Plan*, London: GLA.
[19] Berkeley-Hanover Consulting (2006), *Scenario Testing for the Further Alterations to the London Plan*, London: LDA.
[20] GLA (2005), *Towards and Older People's Strategy for London*, London: GLA

2. Economy and skills

Over recent years London has experienced strong growth that has placed the capital ahead of other European and many global cities.

Recent research by PricewaterhouseCoopers (PwC) shows that London was the sixth largest city economy in the world by estimated GDP in 2005, but should rise to fourth place by 2020, overtaking Paris and Chicago[21]. Tokyo, New York and Los Angeles are expected to be ahead of London in 2020, but London's economy is projected to grow faster than any of these cities, driven in particular by strong growth in business and financial services[22].

Out of eleven key European cities, Inner London ranked second, just behind Stockholm, in terms of economic growth with the main drivers being demographic change and the rapid expansion in global financial services[23]. However there are warning signs on the horizon: by 2020 none of the projected top 30 fastest-growing large cities will be from the major advanced economies, with emerging economy cities, for example Mumbai, Istanbul and Beijing set to move into the global top 30 by this point[24].

In terms of comparisons to the rest of the UK, the PwC report also shows that, despite London suffering the sharpest fall in year-on-year growth as the business and financial services sectors come under pressure, the capital (along with the South East) is expected to remain amongst the fastest growing UK regions in 2008.

The average London borough economy is almost twice the size of the average district in the Great Britain[25]. But there is substantial variation: whilst all London boroughs fall in the top quartile by economic scale, inner boroughs such as the City of Westminster, Camden, Tower Hamlets and Islington have much larger economies than other boroughs such as Bexley, Barking and Dagenham and Waltham Forest.

Despite the economic strengths presented above, London boroughs have a very similar skills profile to the national average[26]. While London's education and skills profile, in general, is close to the national profile, there are notable differences. There is a degree of skills polarisation amongst the resident working population, with above-average shares in both skills poverty and with high skills. Boroughs with higher skilled populations tend to be in the south west and outer south east of London whereas lower skilled populations tend to be clustered in north and east

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[21] Estimated GDP at purchasing power parities (PPPs) of urban agglomerations as defined in the UN's World Urbanization Prospects report.
[22] PricewaterhouseCoopers (2007) *UK Economic Outlook March 2008*.
[23] London Development Agency (2004) *London Futures*.
[24] PricewaterhouseCoopers (2007) *UK Economic Outlook March 2008*.
[25] The Local Futures Group (2007) *The State of the London Boroughs.*
[26] The Local Futures Group (2007), *The State of the Borough: An Economic, Social and Environmental Profile of the City of London,* London

London boroughs. This leaves open the question as to whether London boroughs can achieve long-term sustainability in terms of their balance between local skills and local jobs[27].

Current forecasts for London

The LDA *London Futures* report notes that London's future economy will bring many challenges and to meet them organisations and people will have to be more flexible, better educated and trained, and more productive[28]. London's economy and the growth of certain sectors are increasingly requiring workers to have a university degree or an equivalent and one report projects that by 2014, 50 per cent of jobs will require degree qualifications[29]. One implication is that London residents without these qualifications may be left behind. Another pressure is the prolonged boom in the housing market. The average house price in London has grown at a pace far stronger than other global cities such as New York, Tokyo and Paris[30] although recent indications suggest that the growth of London's housing market is slowing down.

The 24-hour society has led to a fast expansion of more labour-intensive industries such as personal services and the demand for service sector workers is felt strongly in London and the South East[31].

Changes in employment growth

The London Plan forecasts that the gross growth in jobs in London 2001 to 2016 is projected as 854,000 alongside a loss of 218,000 jobs, leading to a net growth of 636,000[32]. As a result of this growth, by 2016 London is projected to account for 16 per cent of total UK employment and 20 per cent of GDP, compared with 15 per cent of employment and 19 per cent of GDP today[33]. The table below, taken from the London Plan, shows the variation in the ranges forecasted by different agencies. The London Plan uses the Volterra forecast as its main predictor.

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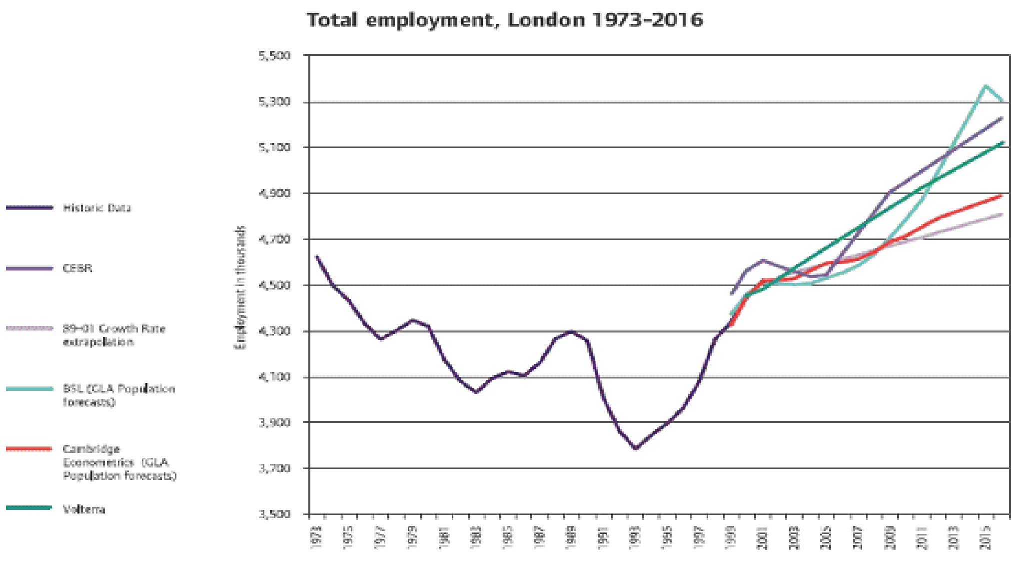
[27] The Local Futures Group (2007), *The State of the Borough: An Economic, Social and Environmental Profile of the City of London,* London
[28] London Development Agency (2004), *London Futures*, London: LDA
[29] LSC (2007), *The London Strategic Analysis 2007/2008*
[30] London Development Agency (2004), *London Futures*, London: LDA
[31] London Development Agency (2004), *London Futures*, London: LDA
[32] GLA (2004), *The London Plan: Spatial Development Strategy for Greater London*
[33] Oxford Economic Forecasting (2006), London's Place in the UK Economy



Source: Sensitivity tests on forecasting for employment in London, GLA 2003 (London Plan)

Changes in employment rates by London Borough

In 2006, the latest GLA forecasts for employment growth in London boroughs indicate that future employment growth will be unbalanced between Inner and Outer London, for example Outer London boroughs will experience slow growth up until 2011 contributing a 'substantially lower' proportion of London's total growth of 10 per cent. In the following decade however up to 2026 this will rise to 26 per cent[34]. The slower employment growths in outer London compared to inner London and the Outer Metropolitan Area until 2011 and the more favourable forecasts afterwards appears to be consensual forecasts and are confirmed by other evidence sources[35].

In addition, the period 2011 to 2026 has other changes forecast for the different areas of London. These forecasts are[36]:

- Central London boroughs (City, Westminster, Kensington and Lambeth) will experience substantially lower levels of growth
- Growth in Newham, Hackney and Wandsworth will rise quite dramatically
- Tower Hamlets and Southwark will continue growing at the same rate with a predicted growth of 20 to 25 per cent

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34 GLA Economics (2005), Interim borough level employment projections to 2016, Current Issues Note 4

35 Gordon, I. (2006), *Future Growth in the Outer London Economy: a review of employment projections and their implications*, North London Strategic Alliance: London

36 Gordon, I. (2006), *Future Growth in the Outer London Economy: a review of employment projections and their implications*, North London Strategic Alliance: London

The London Plan Alterations scenarios[37] forecast population and jobs in London for high and low economic growth scenarios. The ranges forecast are:

- **Low growth scenario**: By 2026 the population is estimated at 7.82 million and jobs at 5.33 million
- **High growth scenario**: By 2026 the population is estimated at 9.17 million and jobs at 5.58 million
- **Baseline scenario**: By 2026 the population is estimated at 8.33 million and jobs at 5.45 million

By 2026 the high job growth scenario has 130,000 more jobs than the Baseline while the low job growth Scenario has 117,000 fewer jobs. According to the London Plan Alteration Scenarios, while it is not impossible for high migration into London to occur during a time of low employment growth, various self correcting mechanisms would be likely to be come into action. For example, migrants would probably be less likely to continue coming to London if job opportunities were weak, while at the same time job creation might be stimulated by lower real wages resulting from the greater supply of labour.

Changes in employment sectors

The London Plan[38] suggests that:

- The finance and business services sector in central London is projected to make the most significant contribution to economic growth in London over the next 15 years with around 440,000 further jobs, just over 50 per cent of the gross total growth of 854,000
- The other major for job growth in London are entertainment, leisure and retail services and unlike the financial and business services these jobs are dispersed across London. Projections indicate that these services will create an additional 178,000 jobs by 2016
- London wholesale distribution is forecast to grow by 14,000 jobs by 2016
- Manufacturing jobs are forecast to fall from 320,00 in 2001 to 240,000 in 2016, a decline of 25 per cent

The Cabinet Office forecast that by 2011, it is estimated that:

- around 30 per cent of the UK workforce is likely to be employed in the distribution and transport sector
- 27.5 per cent may be employed in business and miscellaneous services

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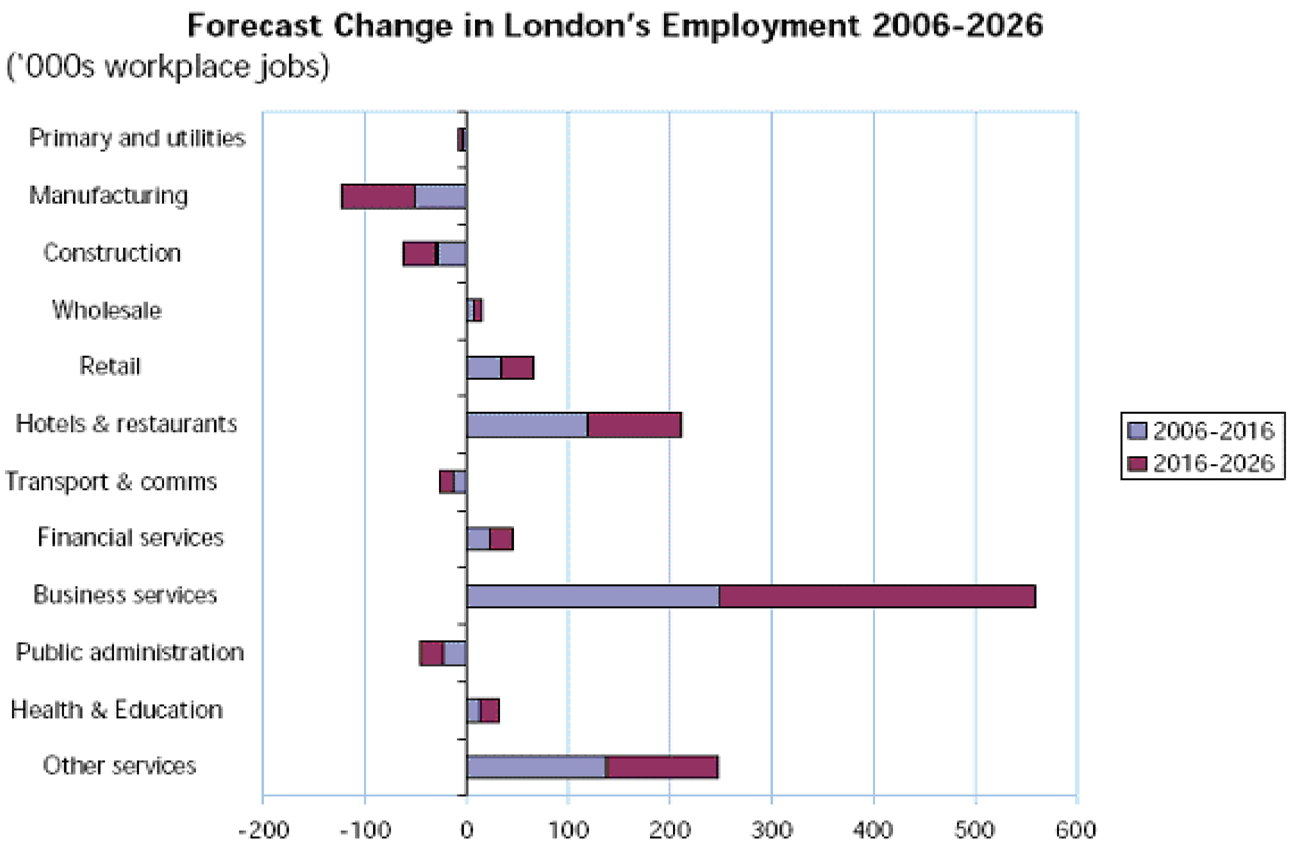
[37] Berkeley-Hanover Consulting (2006), *Scenario Testing for the Further Alterations to the London Plan*, London: LDA.
[38] GLA (2004), *The London Plan: Spatial Development Strategy for Greater London*

- 22 per cent could be employed in non-marketed services
- 12.5 per cent employed in manufacturing
- around 6 per cent in construction
- 2 per cent in the primary / utilities sector[39]

The mid-term economic forecast published by the GLA in 2006[40] indicates similar patterns across the employment sectors as the two sources of evidence cited above. The chart below, taken from the GLA mid-term economic forecast demonstrates the growth of the business and leisure sectors and decline of the manufacturing and construction sectors.



Source: GLA Economics, London's Economic Outlook: Autumn 2007

[39] Cabinet Office (2001), *Short Survey of Published Material on Key UK Trends: 2001-2011*, London
[40] GLA Economics (2007), *London's Economic Outlook: Autumn 2007 – The GLA's medium-term planning projections,* London

Changes in working patterns

The Cabinet Office report forecasts a number of changes and continuations of national working patterns[41]:

- Already established patterns of longer working hours will continue
- By 2011 around 13.5 per cent of the UK's workforce will be self-employed with about 30 per cent working part-time. By 2010, 40 to 50 per cent of management roles will likely be carried out from home
- By 2010, there may be over 4.5 million small and medium enterprises (SMEs), up from some 3.7 million today, possibly creating over 2 million new jobs. Most of these 4.5 million SMEs do not exist today. Conversely, it is thought that most of today's SMEs will not exist by 2010
- At the beginning of the century only 8 per cent of the workforce were tele-workers. It is suggested that by 2015, 70 to 80 per cent of workers could be, at least partially, working from a remote location
- The majority of new jobs by 2014 will be part-time

A report comparing London's employment forecasts by gender indicates that the future employment prospects for women in 2004 to 2016 are projected to grow and that there is broad consensus between the forecasts produced by different agencies[42]. By 2016 women's share of total employment in London is expected to be 48 per cent (in 2003 it was 45 per cent) and more female jobs will be gained in the business and services sectors but fewer in the financial sector.

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[41] Cabinet Office (2001), *Short Survey of Published Material on Key UK Trends: 2001-2011*, London
[42] Veruete-McKay, L. & Theseira, M. (2006), *Comparison of London's employment forecasts by gender*

3. Housing and infrastructure

Housing represents a key challenge to London within the next few decades. GLA estimates predict that there will be more than 300,000 new households in 2016 compared with 2001[43], a figure supported by Travers et al in their estimate of around 20-25,000 new households per annum.[44] These figures assume a constant household size, however, whereas in reality the number of people in each household is expected to decline. In addition, these figures also only deal with growth and do not address the existing shortfall in accommodation: in 2004, it was estimated that this would affect 112,200 households.[45] The London Mayor made a commitment in 2005 to address this by 2015, meaning London would require an additional 11,220 houses per year on top of the 20-25,000 to accommodate the growing population. In the same year, London annual completions of dwellings by private enterprise were 13,600.[46] There is the potential to offset this by bringing vacant properties back into use, but this is likely only to account for 25,000 additional properties – assuming existing stock is maintained during this time so it does not become vacant and negate this growth.[47]

The quality of current stock, and its ability to meet the demands of changing lifestyles, is also likely to be of concern. Particularly in London's suburbs, much of the property dates to the inter-war period and, especially where private landlords predominate and the renting population is transitory, is in danger of falling into obsolescence.[48] Additionally, changing lifestyles mean people have different requirements for their houses, especially in terms of space for home-working and for entertainment and leisure. These demands do not necessarily change with changes to household size: increasingly, those living alone want spare rooms for visitors, and existing stock of one-bedroom and studio flats is inadequate to meet demands.

A trend with significant influence over the future of London's housing is a growing income disparity, putting increasing pressure on housing demand. Travers et al note that professionals on high incomes are likely to contribute to the gentrification of many areas of inner and suburban London.[49] The shortage of affordable housing has led to overcrowding and the increased use of temporary housing and bed-and-breakfast accommodation. Many people are unable to afford to buy houses in

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[43] GLA (2004), *The London Plan*, London: GLA.
[44] Travers, T., Whitehead, C., Holmans, A. and Gordon, I. (2004), *Housing in London: Future Perspectives*, London: LSE.
[45] GLA (2004), *The London Plan*, London: GLA.
[46] Office for National Statistics and GLA (2007), *Focus on London*, Hampshire: Palgrave Macmillan
[47] GLA (2004), *The London Plan*, London: GLA.
[48] URBED with the TCPA (2002), *A City of Villages*, London: GLA.
[49] Travers, T., Whitehead, C., Holmans, A. and Gordon, I. (2004), *Housing in London: Future Perspectives*, London: LSE

London and are opting for longer commutes or leaving the capital altogether. The literature suggests, therefore, that the two major issues to 2020 are to ensure that there is sufficient housing of an adequate standard and that those who are not in a position to join the housing market can be accommodated.

As the demand for housing grows, it creates a substantial pressure on London's limited land space. Land for community use is likely to be at a premium, reflected in its cost. A future question is, therefore, how to maximise the space deemed suitable for housing, while ensuring that adequate support facilities can still be provided.[50]

[50] Berkeley-Hanover Consulting (2006), *Scenario Testing for the Further Alterations to the London Plan*, London: LDA.

4. Climate change and the environment

It is becoming increasingly common to hear climate change pitted as the defining issue of the twenty first century and a significant driver for change[51]. London's ecological footprint is estimated to be some 125 times its physical area, roughly the same area as the UK's productive land capacity[52]. As this figure shows London and its local authorities have a pivotal role in tackling climate change both at a national and global level.

The Draft Climate Change Bill, set to become UK law in early 2008, is due to introduce a national statutory **60 per cent reduction target in national CO^2 emissions by 2050**. While central government will be responsible for meeting these targets, local government will be a key partner in delivering cuts in carbon emissions through the roles it plays in providing services to communities and 'place-shaping' through planning and community leadership[53].

The Climate Change Commission's report notes that the Greater London Authority and Transport is often cited by environmentalists as best practice for the UK and London was the first city in Britain to set statutory CO^2 emission reduction targets of 20 per cent by 2015 and 60 per cent by 2050. Other targets include a 60 per cent reduction in household recycling rates by 2015 and the Mayor's Energy Strategy proposes that every borough should have at least one zero-carbon development by 2010.

London is expanding – its population is growing faster than in the UK as a whole and its economic growth is forecast to continue[54]. The London Plan notes that unless action is taken this growth will increase the city's environmental impact. However the London Climate Change Agency argues that this growth represents an opportunity to transform London into a 'sustainable, low carbon energy community'[55] and that London is already leading by example in putting climate change at the core of its development vision through the **London Plan, Further Alterations to the London Plan** and the **Mayor's Energy Strategy for London**.

However, apart from early success stories such as the recycling services established in Barnet, Bexley and Sutton, there is limited evidence of the policy framework for environmental sustainability emerging from government and the GLA being translated into effective policies and implementation mechanisms by the boroughs[56].

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[51] The London Mayor's Climate Change Action Plan, February 2007
[52] GLA (2002), *City of Villages: Promoting a sustainable future for London's suburbs*
[53] LGA Climate Change Commission (2007), *A Climate of Change – Final Report*
[54] London Mayor's Energy Plan Strategy, February 2004
[55] London Climate Change Agency (2006), *Moving London Towards a Sustainable Low Carbon Energy Community*
[56] GLA (2002), *City of Villages: Promoting a sustainable future for London's suburbs*

Current forecasts for London

There appears to be consensus in the evidence of the **likely future climate patterns** and impact that this will have on London. For example the LDA London Futures report notes that weather patterns are already becoming more unstable, with greater numbers of storms and more concentrated rainfall. In the future summers are forecast to become hotter and drier and winters will be warmer but wetter[57].

Another projection for which there is broad consensus around is that flooding is a major issue related to climate change and despite the Thames Barrier, significant areas of London could be subjected to flooding[58].

The GLA *Carbon Scenarios to 2026* cites increasing evidence around a 'tipping point' whereby natural feedback mechanisms will lead to uncontrollable, irreversible and accelerated climate change[59]. The inter-linking of London with international capital markets means that the wider financial service sector is likely to be impacted by both domestic and global extreme climate change events, highlighting the possible economic impacts of climate change on London[60].

The GLA *Impacts of Climate Change on London* report notes that London may be particularly sensitive to increases in temperature in the future because of the **urban heat island effect** whereby a metropolitan area is significantly warmer than its surroundings. Models show progressive increases in both summer heat island intensity and frequency with climate change. This will have detrimental effects on air quality, summer electricity demand, and comfort in the city's buildings and transport network[61].

CO^2 emissions – data forecasts for London

- Current UK targets for air quality standards are expected to have been met by 2010[62]
- Total UK CO^2 emissions are projected to rise from 151.7 (as of 2005) to 153.8 MtC by 2011[63]

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[57] London Development Agency (2004), *London Futures*, London: LDA
[58] Hall, J., Reeder, T., Fu, G., Nicholls, R., Wicks, J., Lawry, J., Dawson, R. & Parker, D. (2005), *Tidal Flood Risk in London Under Stabilisation*
[59] GLA (2006), *London Carbon Scenarios to 2026*, London
[60] GLA (2006), *London Carbon Scenarios to 2026*, London
[61] GLA (2002), *London's warming: the Impacts of Climate Change on London,* London
[62] Cabinet Office (2001), Short Survey of Published Material on Key UK Trends: 2001-2011, London
[63] Cabinet Office (2001), Short Survey of Published Material on Key UK Trends: 2001-2011, London

The London Plan Alteration scenarios highlight how higher than expected populations and economic growth scenarios will make it more difficult to achieve the London Plan's target in reducing carbon emissions by 60 per cent by 2050. However, it is noted that under these higher growth scenarios a demand for and acceptance of stricter emission controls might be triggered to curb the increase in emissions[64].

Temperature – data forecasts for London

The GLA *Impacts of Climate Change in London* report identifies a number of possible environmental trends for London, summarized below:

- Winters by the 2050s will become warmer by 1 to 2ºC and by up to 3.5ºC by the 2080s
- Summers in the 2050s will be 1.5 to 3.5ºC hotter and 5ºC hotter by the 2080s
- Higher summer temperatures will become more frequent, and very cold winters will become increasingly rare
- Daily maximum temperatures of 33ºC, which currently occur about one day per summer in the south-east, could occur 10 days per summer by the 2080s (medium high emissions scenario).
- In central London, the urban heat island effect currently adds up to a further 5 to 6ºC to summer night temperatures, and will intensify in the future
- By the 2080s, London's summer extreme temperatures could be comparable with those of present-day New York[65].

Impact of temperature changes

Rises in average winter temperatures would result in the reduction of wintertime deaths. A recent Department of Heath report has estimated that by the 2050s up to 20,000 fewer deaths might occur in the UK as a whole as a consequence of climate change[66]. However it also expected that there would be higher levels of mortality during summer due to the increased temperatures[67].

Increasing temperatures on the London Underground will lead to reduced passenger comfort as well as reductions in comfort for occupants in domestic, commercial and public buildings which could lead to business disruption[68]. For example, building simulations of a small commercial, non air conditioned property in London for possible climate change conditions in the 2050s found that temperatures would be outside established "comfort levels" for 23 per cent of working hours. Higher

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[64] GLA (2006), *Scenario Testing for the Further Alterations to the London Plan*, London
[65] GLA (2002), *London's warming: the Impacts of Climate Change on London,* London
[66] Department of Health (2008), *Health Effects of Climate Change in the UK*
[67] GLA (2005), *Towards an older people's strategy for London: A draft Mayoral strategy for consultation*, London
[68] GLA (2002), *London's warming: the Impacts of Climate Change on London,* London

temperatures will increase the demand for air conditioning and therefore supply of electricity, which will have further adverse effects for the environment unless electricity is produced from renewable sources[69].

The impact of climate change on tourism in London is uncertain[70]. London might benefit from increased numbers of tourists if southern Europe becomes less attractive but then potential tourists may also be deterred by future heat waves and the heat island effect. The heat island effect may also lead to increased numbers of Londoners leaving the city for short breaks elsewhere in the UK. The higher temperatures in London may also increase 'outdoor living' with greater demand for parks and outdoor eating and recreational activities[71].

Rainfall and flooding – data forecasts for London

The forecasts below, unless otherwise stated, are projected by the GLA *Impacts of Climate Change on London* report:

- Winters will become wetter by between 10 to 20 per cent by the 2050s and up to 30 per cent by the 2080s.
- Summers may become drier by 20 to 40 per cent in the 2050s and may be 50 per cent drier by the 2080s.
- Heavy winter rainfall could occur twice as frequently by the 2080s.
- The number of storms each winter crossing the UK could increase from five (the 1961-90 average) to eight by the 2080s.
- Snowfall amounts will decrease by between 50 to 100 per cent.
- There is a consensus within the evidence that flooding will be a greater risk and the data available on predicted rises of sea level in the Thames Estuary is similar. One source reports that the relative sea level in the Thames Estuary will continue to rise by between 26 and 86cm by the 2080s and will rise further in the future[72]. Another source reports slightly lower figures in that by 2100 the worst case scenario is a 61cm rise. The full ranges reported in this source are 16cm to 24cm by 2050 and 34cm to 61cm by 2100[73].

Impact of increased risk of flooding

London is exposed to far greater potential damage from flooding than any other urban area in the UK, due to the value of its assets and the fact that a significant proportion of the city lies within the floodplain of the River Thames and its

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69 GLA (2002), *London's warming: the Impacts of Climate Change on London,* London
70 GLA (2002), *London's warming: the Impacts of Climate Change on London,* London
71 GLA (2002), *London's warming: the Impacts of Climate Change on London,* London
72 GLA (2002), *London's warming: the Impacts of Climate Change on London,* London
73 Hall, J., Reeder, T., Fu, G., Nicholls, R., Wicks, J., Lawry, J., Dawson, R. & Parker, D. (2005), Tidal Flood Risk in London Under Stabilisation

tributaries. More than £80 billion worth of property and 1.25 million people already live and work within this floodplain[74].

London is vulnerable to three types of flooding: the inundation of floodplains by river water, local flooding when the drainage network is overwhelmed by intense rain storms, and by tidal surges in the Thames[75]. Climate change could adversely affect all three by increasing the amount of rainfall and increasing sea levels and potentially leading to more frequent closures of the Thames Barrier. Whilst flood protection levels are presently good, in the longer term, unless current action to increase investments in flood management measures is continued, the increased risk of flooding from climate change could lead to damage to buildings and property, and disruption of London's transport network[76]. New developments to address the growing demand for housing will need adequate flood protection from all flood sources. The current flood defence standard for the tidal defences is estimated to be about a 2000 to 0.05 per cent risk of flooding, declining to its original design standard of 0.1 per cent risk of flooding, as sea level rises, by 2030[77].

The *Tidal Flood Risk in London* scenario report suggest that the worse case scenario of a predicted 61 cm rise in sea levels by 2100 represent a serious threat to human life, particularly given the difficulties of evacuating the densely populated areas of the Thames estuary[78].

Environmentally friendly service provision and behavioural changes

The LDA *London Futures* report notes that the demand for environmentally friendly solutions and services is set to grow. It highlights that there is already evidence that consumers and prospective employees in London are increasingly using green issues as an important factor in making decisions about purchases and careers and that this trend will continue in the future as demand for clean machines such as zero emission cars and 'quick fixes' such as oxygen detox bars continues to grows[79].

The importance of individual behaviour for climate change in London is shown by the fact that all of the scenarios developed as part of the GLA's carbon scenarios to 2026 require persuading private householders to make changes to their homes by adopting measures to improve energy efficiency[80]. These measures include the installation of insulation, the integration of renewable energy, and the use of micro-

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[74] GLA (2006), Scenario Testing for the Further Alterations to the London Plan, London
[75] GLA (2002), *London's warming: the Impacts of Climate Change on London,* London
[76] GLA (2002), *London's warming: the Impacts of Climate Change on London,* London
[77] GLA (2002), *London's warming: the Impacts of Climate Change on London,* London
[78] Hall, J., Reeder, T., Fu, G., Nicholls, R., Wicks, J., Lawry, J., Dawson, R. & Parker, D. (2005), *Tidal Flood Risk in London Under Stabilisation*
[79] London Development Agency (2004), *London Futures*, London: LDA
[80] GLA (2006), *Scenario Testing for the Further Alterations to the London Plan*, London

CHP systems or, in the recommended scenario, connection to district heating which is considered the most economically viable choice. However, the initial development of heat networks will most likely be in the areas of new build and existing social housing where it is easier to influence outcomes[81].

[81] GLA (2006), *Scenario Testing for the Further Alterations to the London Plan*, London

5. Technological innovation

The LDA *London Futures* report notes that 'people aren't just connected to people. Increasingly people are connecting to machines'[82] and that technological innovations are continuously being developed to enable increasingly seamless connectivity. However the acceleration of technology development is challenging governments[83]. For example it has been noted that previous time-spans of technological development and adoption were compatible with the life-span of government policy development - it took 100 years for the telephone to approach 100 per cent penetration of homes in western society, 40 years for the TV set, twenty years for the PC, and ten years for mobile phones. However, the challenges for government are due to the increasingly rapid rates as illustrated by the fact that it only took three years for mobile media devices such as iPod to be developed and adopted[84].

Future developments in new technologies

The LDA *London Future*s report describes the development and refinement of a range of technological innovations which have relatively recently been introduced and adopted by consumers in London. New generations of technology are likely to be combined with increasing levels of embedded intelligence therefore changing consumers' perceptions and experiences of everyday life[85]. For example the installed bases for Wifi wireless internet connections will continue to grow, having already risen from 0 to15 million since 1999 when Wifi was first introduced. Bluetooth is likely to evolve allowing greater connectivity between difference machines and appliances such as washing machines. Identification and tagging systems such as GPS will continue to be developed and incorporate new features[86].

However, while there is a consensus that innovative technology is a key driver for London and that technological developments will continue, some sources of evidence describe a slowing down of development by 2011 although there will be continuing improvements in the speed of processing and bandwidths[87]. Other sources of evidence highlight potential challenges for government, for example traffic jams created by mass usage of GPS navigation systems[88].

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[82] London Development Agency (2004), *London Futures*, London: LDA
[83] Wilson, F. & Blakemore, M. (2007), *Think Paper 8: Technology Futures and why Government should care*, European Commission
[84] Wilson, F. & Blakemore, M. (2007), *Think Paper 8: Technology Futures and why Government should care*, European Commission
[85] London Development Agency (2004), *London Futures*, London: LDA
[86] London Development Agency (2004), *London Futures*, London: LDA
[87] Cabinet Office (2001)*, Short Survey of Published Material on Key UK Trends: 2001-2011,* London
[88] Wilson, F. & Blakemore, M. (2007), *Think Paper 8: Technology Futures and why Government should care*, European Commission

Forecasts for technological use

- By 2011, an estimated 75 per cent of UK households will have Internet access[89]
- By 2010, 95 per cent of the industrialised world may be conducting 'e-business' on-line (as distinct from 'e-commerce')[90]

Potential impacts on London

The implications of technological innovations on **work and working virtually** have been the focus for some of the evidence included in this literature review. The LDA London Futures reports that remote working is possible and will increase but that there will still be a need for physical offices in the future due to the necessity for face-to-face contact. Physical offices of the future will need to enable knowledge working as opposed to information working so as to fit better with London's likely future economy.

Increased visibility has been identified by other sources of evidence as an issue for London in the future. By combining technologies such as mobiles, credit cards and internet together, people will become more visible and traceable which have implications for future civil liberties, crime and data protection and sharing issues[91].

The London Plan describes new technology as one of the key drivers of **economic activity** in London and that in the future London will be affected by increased rates of new technological change that will transform markets and impact heavily upon information and communications[92].

Other impacts that future new technologies may have on London described in the literature is the possible continuation of current trends whereby a two-tier society has developed based upon **unequal access** to new technologies. The Shape of Civil Society to Come report highlights that there is uncertainty as to whether or not this inequality will reduce or persist in the future and that future challenges involve ensuring that technology do not fragment civil society[93].

Other sources of evidence on the future of new technology examines the challenges and opportunities for the UK around '**intelligent infrastructures'** where science and technology is applied to transport, telecommunications, water and energy infrastructures over the next fifty years. The Foresight *Intelligent Infrastructure System Scenarios 2055* identifies three uncertainties regarding the future of intelligent infrastructures; what developments will happen in science and

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[89] Cabinet Office (2001)*, Short Survey of Published Material on Key UK Trends: 2001-2011,* London
[90] Cabinet Office (2001)*, Short Survey of Published Material on Key UK Trends: 2001-2011,* London
[91] Carnegie UK (2007), *The Shape of Civil Society to Come: Inquiry into the Future of Civil Society in the UK and Ireland,* London
[92] GLA (2004), *The London Plan*, London: GLA
[93] Carnegie UK (2007), *The Shape of Civil Society to Come: Inquiry into the Future of Civil Society in the UK and Ireland,* London

technology, the role of businesses and government and social attitudes[94]. Four scenarios were developed based upon two axes, with one axis relating to social attitudes spanning from acceptance to resistance towards new technology and another axis describing the possible consequences of the environment, economy and society upon transport. In one scenario the future society is characterised by constant information, consumption and competition and increasing use environmentally friendly technology. The second scenario has a primary focus on environmentally friendly technology and attitudes; the third scenario is that of tribalism following an environmental shock and the fourth is that of a well intentioned but struggling commitment to environmentally friendly technology.

[94] Foresight (2007), *Intelligent Infrastructure Futures: The Scenarios – towards 2055*, Office for Science and Technology, London

6. Lifestyles and behaviours

Projections regarding lifestyles and behaviours tend to be general for the population of the UK as a whole, rather than specifically focusing on London – though we might expect London to be one of the cities in which change is initiated or reflected at an early stage. Expectations are of the continuation of existing trends, including:

- a decline in the numbers of adults marrying; a greater prevalence of extended families and new forms of family structure; and a change in the age profile of families, with adults having children at a later age, while their own parents also live longer.
- the continuation of a trend towards growing religious and cultural diversity within the population, with the potential both to enrich social life and to exacerbate social tensions.
- changes in communication and technology, which encourage greater involvement in personal production and
- the move towards flexible working and home-working, with people wanting greater work-life balance and more leisure time.

The literature surveyed offered a greater sense of the future landscape of cultural and leisure provision in London, with a shift from out-of-town complexes and a central London focus towards a greater cultural offer in town centres across the capital.

Finally, the literature reviewed also looks at the more general social trends which may inform the way people live, including individualism, the 'well-being agenda' and the 'surveillance society'.

Family life

Literature on marital and family life indicates a growth in the proportion of the adult population who is unmarried or never married. The Cabinet Office survey of UK trends predicted that the proportion of the male adult population who are married would fall below 50 per cent by the end of the first decade of the 21st century. By the same point, the proportion of adult men and women who had never married would stand at 39 per cent and 31 per cent respectively, up to 32 per cent and 24 per cent in 1996.[95]

Looking ahead to 2020, at least one fifth of the UK's 18-35s – the generation forging young families - will have grown up in a lone parent family, with the mother heading the household in 90 per cent of cases. A similar proportion will be members of extended families of step-parents, step-siblings and half-siblings[96]. Although

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[95] Cabinet Office (2001), *Short Survey of Published Material on Key UK Trends: 2001-2011*, London
[96] Cabinet Office (2001), *Short Survey of Published Material on Key UK Trends: 2001-2011*, London

families headed by same-sex partners receive less treatment in the reviewed literature than may be expected, these would be expected to become more prevalent. While a plurality of family structures emerges, so the typical age profile of families is likely to continue to change. The age at which women have their first child continues to rise[97], while elderly relatives are living longer. Older working-age adults may thus find themselves with increasing responsibility for care of both their children and parents.[98]

Religion, culture and identity

Migration will continue to enhance current levels of cultural and religious diversity in the UK. Recent history indicates an ongoing decline in the number of practising Christians in the UK, tempered by a growth in the evangelical movement. By contrast, the number of people practising a non-Christian religion in the UK looks set to continue to grow.[99] According to the Carnegie Trust, in its publication on *The Future of Civil Society*, "increasing cultural [and religious] diversity could have both positive and negative outcomes. On the one hand, as the number of minority communities increase divisions and social tensions could emerge based around the different needs and values of the various groups.... On the other hand, increased cultural diversity could lead to a burst of creativity and new connections between people."[100]

In this cultural climate, individuals' identities are complex and fluid, based on a range of factors including ethnicity, religion, education and, increasingly, even a 'virtual' persona which can be adapted to different circumstances more easily. Individual identities are also less wedded to ideas of age, particularly among the older population which is better informed, with higher expectations, than previously.[101]

Communications

The Carnegie Trust also notes as an important component of change that lifestyles increasingly have a virtual component. The average young person spends 23 hours per week using the internet, with two-thirds claiming that their computer is central to their way of life.

With this has come a greater emphasis on production of new media, rather than simple consumption. This is expressed through the growth of blogging and news message boards, which allow for 'real-time' comment and debate and further reduce the division between producer and consumer. Particularly among younger people,

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[97] London Development Agency (2004), *London Futures*, London: LDA
[98] Cabinet Office (2001), *Short Survey of Published Material on Key UK Trends: 2001-2011*, London
[99] Cabinet Office (2001), *Short Survey of Published Material on Key UK Trends: 2001-2011*, London
[100] Carnegie UK Trust (2007), *The Shape of Civil Society to Come*, London: Carnegie UK Trust.
[101] Carnegie UK Trust (2007), *The Shape of Civil Society to Come*, London: Carnegie UK Trust.

this is also seen in the social media sites like YouTube, MySpace and Facebook. A generation of young adults has now grown up with digital and networked media, which provide a significant proportion of their entertainment.

Leisure time

While British people work the longest hours in Europe, and Londoners work the longest hours and average the longest commutes of all, there are signs that this may be changing. Greater numbers of people are opting to take career breaks and request flexible working and home-working arrangements out of desire for greater work-life balance.[102] A MORI survey found that 52 per cent of office workers want to work at home because it offers greater freedom, and 42 per cent to reduce commuting time; while most employees still like to be connected to the office, a quarter would like to work from home every day.[103] The long-term impact of this is more complex, however, as employees also acknowledge that the infrastructure supporting home-working, such as laptop computer and palm pilots, may encourage a "less sharp separation of work and home".[104] These options are also most likely to favour those in more high-status positions, while those with weak labour market status struggle to be able to negotiate similar arrangements with their employers.[105]

Provision of entertainment and culture in London

If proposals from the Mayor's London Plan are realised, the focus of London's leisure entertainment will be more strongly on the local town centre.[106] This represents a specific movement away from out-of-town centres, which are found more in the outer London boroughs, and are often inaccessible to many people. These town centres will have a range of uses, including residential areas, health centres and educational establishments alongside restaurants, bars, cinemas and other activities.

Town centres will also be the focus of new cultural provision in terms of local theatres, tourist attractions and libraries. While central London in particular is rich in its cultural offer, parts of suburban London, particularly those in the east, have lacked similar facilities. The next two decades could, therefore, witness a growth in cultural and community activity and the development of new attractions outside the traditional tourist districts of central London

Social trends

The Carnegie Trust identifies two main social trends which may influence how people choose to live to 2020. First among these is individualism, which has been

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[102] London Development Agency (2004), *London Futures*, London: LDA
[103] London Development Agency (2004), *London Futures*, London: LDA
[104] Berkeley-Hanover Consulting (2006), *Scenario Testing for the Further Alterations to the London Plan*, London: LDA., p.iii.
[105] Carnegie UK Trust (2007), *The Shape of Civil Society to Come*, London: Carnegie UK Trust.
[106] Greater London Authority (2004), *The London Plan*, London: GLA.

one of the strong social trends in the UK from the 1980s, leading to a poorer sense of community and fragmentation of values. Second is the greater concern with 'well-being', which can be expressed in individualist terms, but, interestingly, may also have the potential to limit individualism through encouraging a more holistic way of living. The outcome of this may be the development of better public spaces and greater connections between individuals in their community.

In addition, people's lives may be subject to more immediate constraints to behaviour, both self-imposed and external. Concerns for greater personal safety in view of security threats may influence personal choices regarding transport use and household location[107], while the increase in government security arrangements might circumscribe people's actions and movements to a greater degree.

[107] Carnegie UK Trust (2007), *The Shape of Civil Society to Come*, London: Carnegie UK Trust.

7. Social cohesion/discord

In many ways social cohesion/discord is influenced to some degree by the majority of the other areas discussed in this literature review such as inequalities in health, housing, access to technology, immigration, crime, economic and employment rates.

There have been a number of national and local government initiatives aimed at improved community cohesion. A key sub-regional response to the need to create greater community cohesion has been the **Community Cohesion Pathfinder Programme**, launched and funded jointly in 2003 by the Home Office and DCLG. Fourteen 'Pathfinder Partnerships' were set up and in London this included the borough of Southwark and the West London Alliance[108], which comprises Brent, Ealing, Hammersmith and Fulham, Hounslow and Harrow. The programme ran until 2004 and described itself as the only pathfinder in the country that involves the public, private and voluntary sectors.

Another important action has been the establishment of the **Institute for Community Cohesion** (iCo) in 2005 and based at Coventry University. It represents a partnership of academic, statutory and non-governmental bodies and aims to 'contribute to the understanding of how communities can become more at ease with 'difference', multiculturalism and patterns of migration'.

According to the LDA *London Futures* report the **poverty gap** between London's richest and poorest residents has grown in the last twenty years despite the growth in disposable incomes[109]. 41 per cent of children in Greater London are in poverty (household income below 60 per cent of median), compared with 31 per cent nationally and 53 per cent of children in inner London are living in income poverty. There are also substantial differences between minority ethnic groups. The Local Futures *State of London Boroughs* report notes that while on average London has higher levels of prosperity than the UK average, there are significant **borough differences** within London with extreme wealth in Chelsea and Westminster and pockets of highly deprived areas in East London boroughs[110].

Current forecasts for London

The LDA *London Futures* report describes a number of challenges for future community cohesion in London that are caused by the city's projected growth on a number of fronts. These challenges are:

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108 http://www.westlondonalliance.org/Page/CommunityCohesion#

109 London Development Agency (2004), *London Futures*, London: LDA

110 The Local Futures Group (2007), *The State of the Borough: An Economic, Social and Environmental Profile of the City of London,* London

- London's population will grow by the equivalent of the city of Leeds over 10 years
- The increasingly international, knowledge based economy in London and demand for degree level qualifications
- Increasing diversity by nearly every measure
- Breaking down of collective values and continued movement towards individualistic norms, undermining the willingness to provide shared services and care and to support the needs of an ageing society
- Increasing inequalities and gaps between different groups such as different generations, communities, ethnic groups, and the skilled and unskilled[111].

The increasing disparity in wealth and other quality of life measures between the poorest sections of society and the wealthiest is a key concern of the London Plan. However it was considered 'inappropriate' to use social and economic polarity as a dimension upon which to develop the scenarios for the London Plan Alterations which means that there is little scenario based evidence for how community cohesion/discord may be affected by possible future polarization[112].

Other sources of evidence focus upon the possible effects of increased diversity, particularly **ethnic and religious diversity**, and the possible challenges and opportunities that this has for social cohesion in the future. For example, the *Shape Of Civil Society to Come* report notes that ethnic and faith based community groups are more likely to feel that under threat, with fewer opportunities for advancement and without a voice. However, the report also comments that these same concerns can also be shared by poor working class white communities, as evidenced by recent successes of the BNP[113].

London inequality and crime forecasts

The Cabinet Office UK Trends 2001-2011 projections in regional inequalities include:

- Current regional inequalities in wealth and income are likely to persist for the rest of the decade
- Migration of skilled labour from North England to the south is likely to continue
- These regional inequalities mean that current educational inequalities are likely to continue

[111] London Development Agency (2004), *London Futures*, London: LDA
[112] Berkeley-Hanover Consulting (2006), *Scenario Testing for the Further Alterations to the London Plan*, London: LDA
[113] Carnegie UK Trust (2007), *The Shape of Civil Society to Come*, London: Carnegie UK Trust.

The same report looks at future crime projections for the UK:

- By 2011, it should be possible for investigators to assemble descriptions of a suspect from DNA, without any other forms of identification.
- The numbers of those most likely at present to commit crime in the UK (young men aged 15 and 20) will rise for most of the next decade and then fall.
- There are increasing opportunities for technology to be developed and misused before counter-measures can be identified
- Since more people are expected to be living alone in 2011, there may be less social pressure on individuals to act against the causes of crime[114]

[114] Cabinet Office (2001), *Short Survey of Published Material on Key UK Trends: 2001-2011*, London

8. Health and well-being

The Local Futures *State of London's Boroughs* report notes that the general health of London's residents is broadly similar to the average health of the rest of the country and when health is measured by life expectancy London ranks 4th highest in the UK[115]. However there are significant variations in the health of London's residents across boroughs. For example, Kensington and Chelsea has the highest life expectancy in the whole of the UK at 84.2 years whereas the average life expectancy in Newham is much lower at 76.8 years, making it one of the lowest in the country. This clearly demonstrates the relationship between socio-economic factors and health. However the Local Futures report suggests that the main determinants for London's above average health in general are lower levels of obesity it the capital along with fewer people claiming incapacity benefit, but higher numbers of smokers and higher than average cancer and circulatory disease mortality.

The ageing population in London provides challenges for London, particularly in meeting the specific needs of older people from diverse backgrounds and shortages of skilled social care workers discouraged by London's higher living costs and low pay[116].

Current forecasts for London

The Cabinet Office UK Trends 2001-2011 report identifies the key drivers for health in the UK as being the ageing population and the trend away from communicable diseases. The future trends it highlights for the UK up until 2011 include:

- A rise in the number of disabled adults over the age of 60 requiring healthcare, in 2001 this figure was 4.6 million by 2011 it is expected that this will increase to 5.2 million
- The report does not find any clear evidence for continuing increases in cancer, obesity, depression and other forms of mental illness. However given that the population is ageing the report suggests that it likely there will be increased incidence of disease
- Communicable disease is likely to decrease but chronic diseases are likely to increase in incidence
- Artificial hearts are likely to be available by 2011

The most recent forecasting report from the London Public Health Observatory suggests that, if current trends in coronary heart disease and cancer mortality for

[115] The Local Futures Group (2007), *The State of the Borough: An Economic, Social and Environmental Profile of the City of London,* London
[116] GLA (2005), *Towards and Older People's Strategy for London*, London: GLA

those under 75 continue, inequalities in mortality between local authority areas will not be reduced by 2010[117].

Obesity

While the Cabinet Office UK Trends report does not identify clear evidence for future growth in obesity, a number of other sources of evidence find that certain sections of the population are likely to become more obese.

The *Forecasting Obesity* report forecasts the levels of obesity in England in 2010 if current obesity prevalence remains unchanged. It finds that in 2003 London's population were less likely to be obese than other parts of the country[118]. For example, 18 per cent of men in London were classified as obese compared to 25 per cent of men living in Yorkshire and Humber. Similar patterns were also true for women with 19 per cent of women living in the South East classified as obese compared to 29 per cent of women in the West Midlands. However, London's children are currently more likely to be obese with 20 per cent of children in London classified as obese in 2003.

By 2010 noticeable increases are expected in obesity around the country, particularly for men living in Yorkshire and Humber. However, obesity levels of men in London will only see a very small rise. For women in London obesity levels are projected to actually fall.

Forecasts for child obesity in London again vary by gender. Boys in London are forecast to become more obese and in fact the greatest increase for this section of the population is expected in London compared to other parts of the country. The report forecasts that the number of obese boys in the city will rise from 2003 levels of 143,052 to 174,218 by 2010. The number of obese girls in London is forecast to reduce by 2010, while in most other parts of the country levels are expected to rise[119].

A report published by Foresight looking at future obesity projections up until 2050 finds that of the three most common **obesity-related diseases** (coronary disease, stroke and diabetes), diabetes is predicted to increase the most as shown by the graph taken from the report below. In addition, the report estimates the future NHS costs of obesity associated diseases for2050. The estimates are:

- Diabetes = £3.5 billion per year
- Coronary heart disease = £6.10 billion per year
- Stroke = £5.5 billion per year[120]

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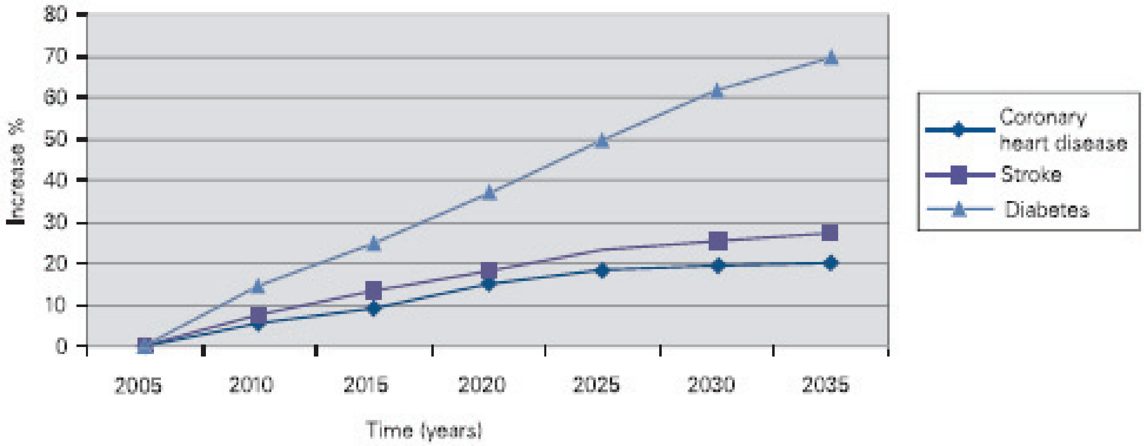
[117] London Health Observatory (2004) *The London Health Forecast*.
[118] Department of Health (2006), *Forecasting Obesity to 2010*, London
[119] Department of Health (2006), *Forecasting Obesity to 2010*, London
[120] Foresight (2007), *Tackling Obesity: Future Choices – Modelling Future Trends in Obesity & Their Impact on Health*, London



Source: Foresight, Tackling Obesity: Future Choices – Modelling Future Trends in Obesity & Their Impact on Health

Appendix

List of sources

Organisation	Title	Date
Bioregional	Enabling One Planet Living in the Thames Gateway	Nov 04
BMRB Social Research and its sister company, Henley Centre HeadlightVision	The Institute for Insight in the Public Services	2007
Business Taskforce for Sustainable Consumption and Production	The Technology Workshop	Apr 07
Cabinet Office	Ethnic Minorities Economic Performance	April 01
Carnegie Trust UK	Scenarios for Civil Society	Oct 07
Carnegie Trust UK	The Shape of Civil Society to Come	Oct 07
Carnegie UK Trust	Inquiry into the future of civil society in the UK and Ireland	Oct 2007
CBI (Confederation of British Industry)	Report of the CBI Climate Change Task Force	2007
CBI (Confederation of British Industry)	Shaping up for the future: the business vision for education and skills	Apr 2007
CBI (Confederation of British Industry)	Powering the future	Nov 2005
Communities and Local Government (CLG)	State of the English Cities (in 2 vols)	March 2006
CLG	The determinants of migration flows in England *(contacted)*	1998
CLG	Homelessness Statistics September 2007 and Rough Sleeping - 10 years on from the target - Policy Briefing 20	Sep 2007
CLG	Eco-towns Prospectus	Jul 2007
CLG	National Strategy for Housing in an Ageing Society - a pre-strategy document	May 2007
Department for Transport	Public attitudes to road pricing in the UK	2004
Foresight	Intelligent Infrastructure Futures: Towards 2055	Jan 06

GLA	London's Warming: The Impact of Climate Change on London	Oct 02
GLA	Planning for London's Growth	March 02
GLA	A City of Villages	August 02
GLA	Child Poverty in London	June 07
GLA	The London Plan	Feb 04
GLA	Scenarios Testing for Alterations to the London Plan	Oct 06
GLA	London Transport 2025	Nov 06
GLA	Climate Change Action Plan	Feb 07
GLA/ London Energy Partnership	London Carbon Scenarios 2026	Nov 06
Government Office for Science & Foresight	Tackling Obesities: Future Choices	Oct 2007
Government Office for Science & Foresight	Modelling Future Trends in Obesity & Their Impact on Health	Oct 2007
Henley Centre HeadlightVision	What the citizen wants	Oct 2006
Home Office	Asylum Statistics	2007
Housing Corporation	Tackling homelessness - Housing associations and local authorities working in partnership	Nov 2007
Housing Corporation	Shared places: Community cohesion strategy	Oct 2007
Housing Forum for London	Private Housing in London: The Next 10 Years	July 04
Islington Strategic Partnership	Islington Climate Change Partnership	2007
Joint Team Network	I.T. event	Dec 05
The Local Futures Group	The State of the Boroughs: An Economic, Social and Environmental Profile of the City of London	December 2007
London Development Agency	London Futures	Nov 04
London Borough of Greenwich	Young persons' anti-poverty strategy	1996
London Climate Change Partnership	Adapting to Climate Changes: Lessons for London	July 06
London Councils	London Matters: Funding the Capital	Feb 07
London Energy Partnership	Investing in London's Low Carbon Future	Nov 06
London Energy Partnership	Skills for a Low Carbon London	March 07

London First	Who Plans London?	May 2007
London First	Towards a Housing Strategy	Feb 2007
London First	Review of the Mayor's Planning Powers	Nov 2006
London First	Transport 2025 Response	Sep 2006
London Health Observatory	Forecast: Inequalities in life expectancy and deaths from cancers, heart disease and stroke in London	Nov 2006
London Health Observatory	A briefing on nutrition, physical activity and obesity in London	Feb 2005
London Health Observatory	The London Health Forecast: Can London's health divide be reduced?	July 2004
LSE London – London Councils	The Impact of Recent Immigration on the London Economy	2007
LSE London - Shelter	Access to housing in a changing financial marketplace	2007
LSE London Discussion Paper	Housing in London: Future Perspectives	May 2004
LSE London Discussion Paper	Urban Planning and Competitive Advantage: London, Sydney and Singapore	May 1999
Office of Science and Technology & Foresight	Cybertrust and Crime Prevention Project	Jun 2004
Oxford Economic Forecasting	London's Place in the UK Economy 06/07	Nov 06
Strategy Unit	London: Analytical Report	July 03
Tyndall Centre	Tidal Flood Risk in London	
Work Foundation	Changing Demographics	2005

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