

THAMES ESTUARY

GROWTH DAY

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To the Thames Estuary Growth Day 2019



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MARK EASTON

Home editor, BBC News



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PROF JANE FALKINGHAM

Director, ESRC Centre for Population Change





Population Change in the UK

Prof Jane Falkingham
Director, ESRC Centre for Population Change
University of Southampton



Overview

1. Key trends in UK population

A growing population

An ageing population

An increasingly diverse population

Changing family structures

2. Brief insight into population change in the Thames Gateway



A century of population change in the UK

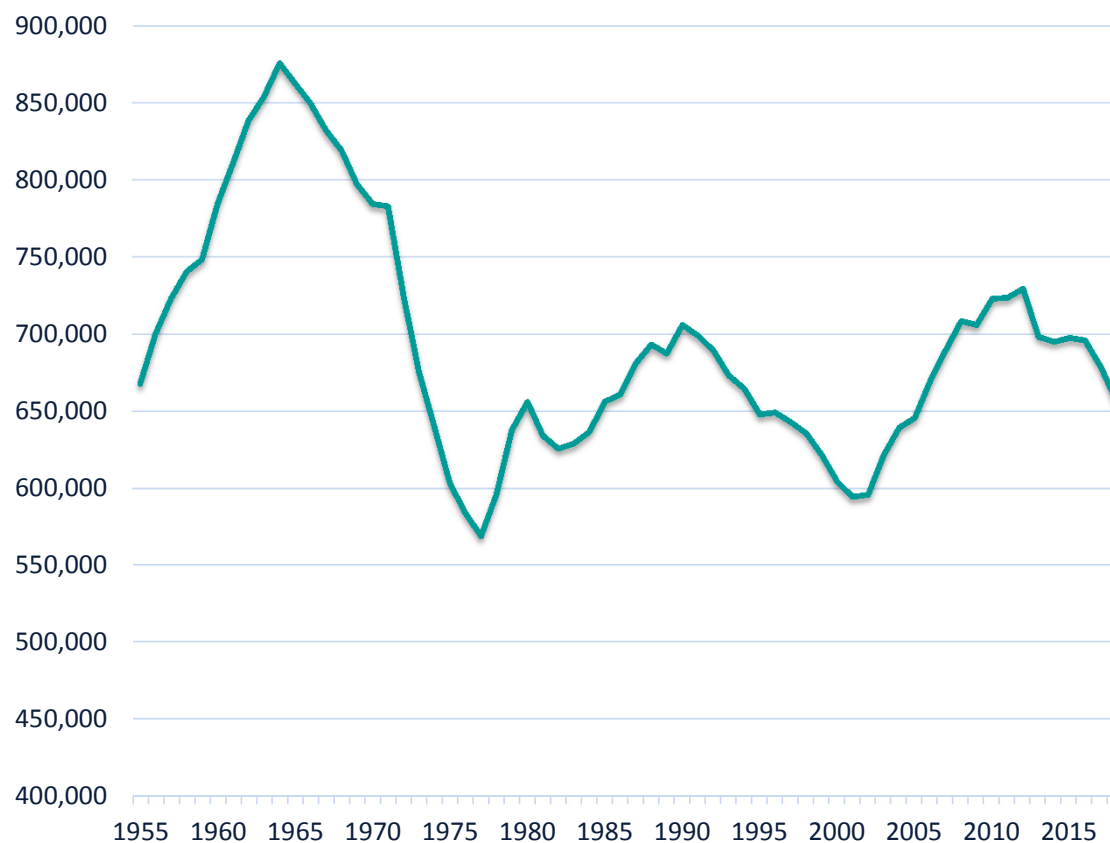
- In 1901 the population of the UK was 39.3 million
- By 2001 it had reached 59 million
- In 1901, the total fertility rate was 3.5
- By 2001 it was 1.7
- In 1901 the average life expectancy for a man was 45
- In 2001 it was 75
 - Rise in life expectancy across the last century is equivalent to over 7 hours a day!
- During the twentieth century more people *emigrated* from the UK than immigrated
 - The net exodus from the UK was over 15 million



Population change in the UK today

- In 2018 the UK population = 66.4 million
- The population of the UK grew by just under 1,100 people a day last year
- The rate of population growth this century has been increasing
 - 0.6% per year since 2001, compared to 0.3 per cent per year 1991-2001 and 0.2 per cent per year 1981-1991
- Driven by increasing fertility, improving mortality *and* net migration

Total births, England and Wales, 1955-2018

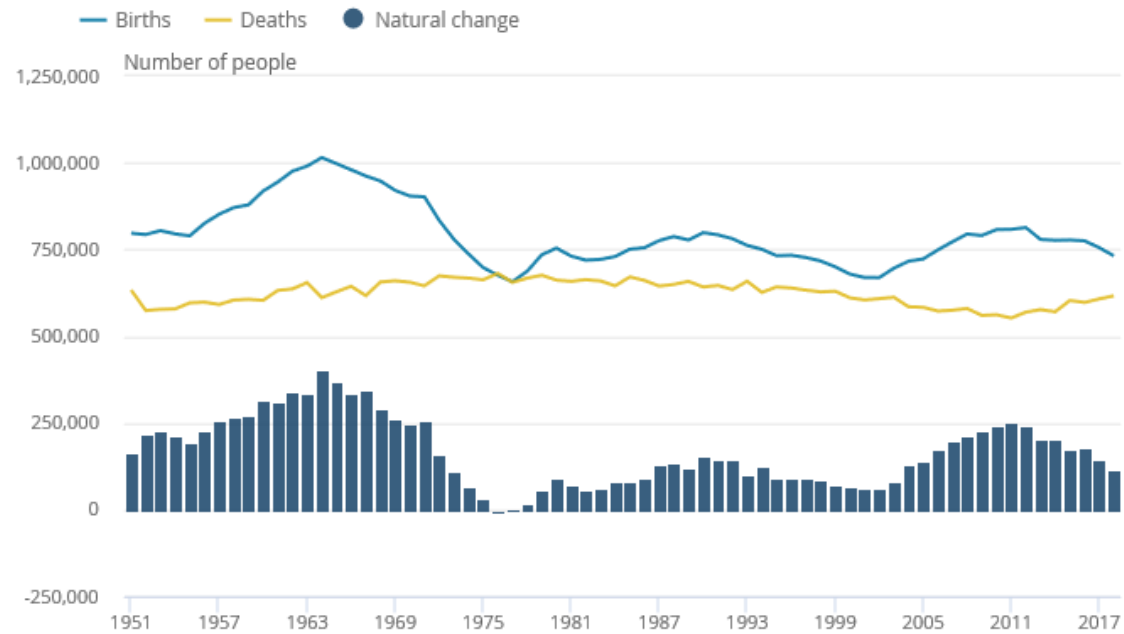


Births in 2018
12% lower
than in 2012



Natural change in 2018 is at its lowest level since 2013

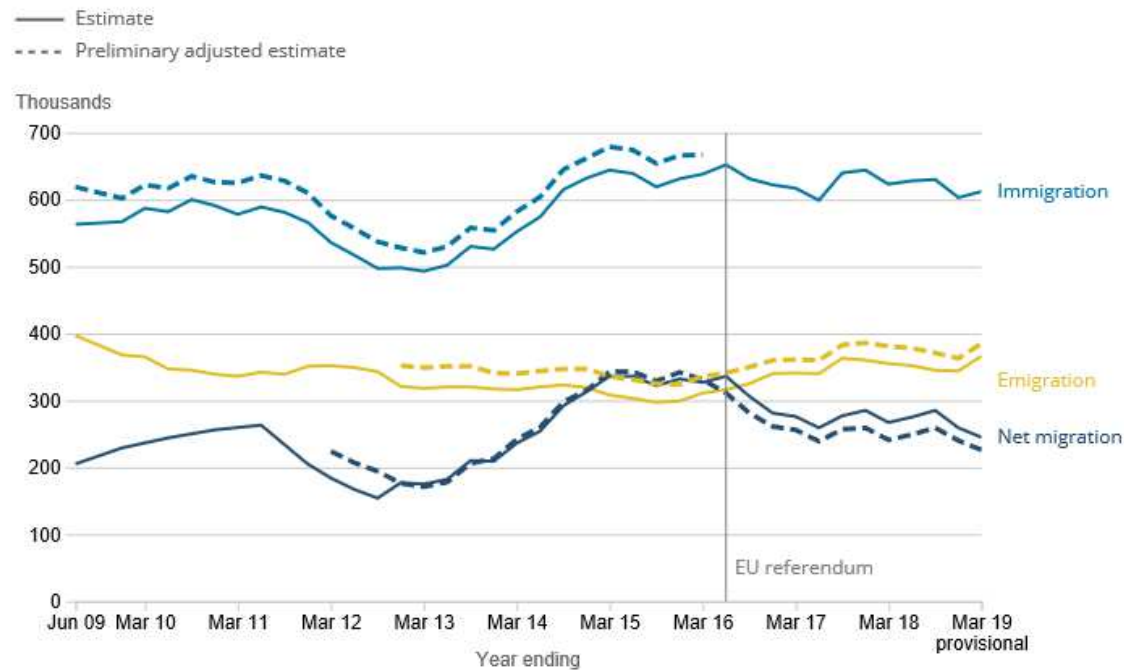
UK births, deaths and natural change, 1951 to 2018



Source: Office for National Statistics - births in England and Wales, and mortality statistics, Northern Ireland Statistics and Research Agency, National Records of Scotland

Long-term immigration, emigration and net migration have remained broadly stable since the end of 2016

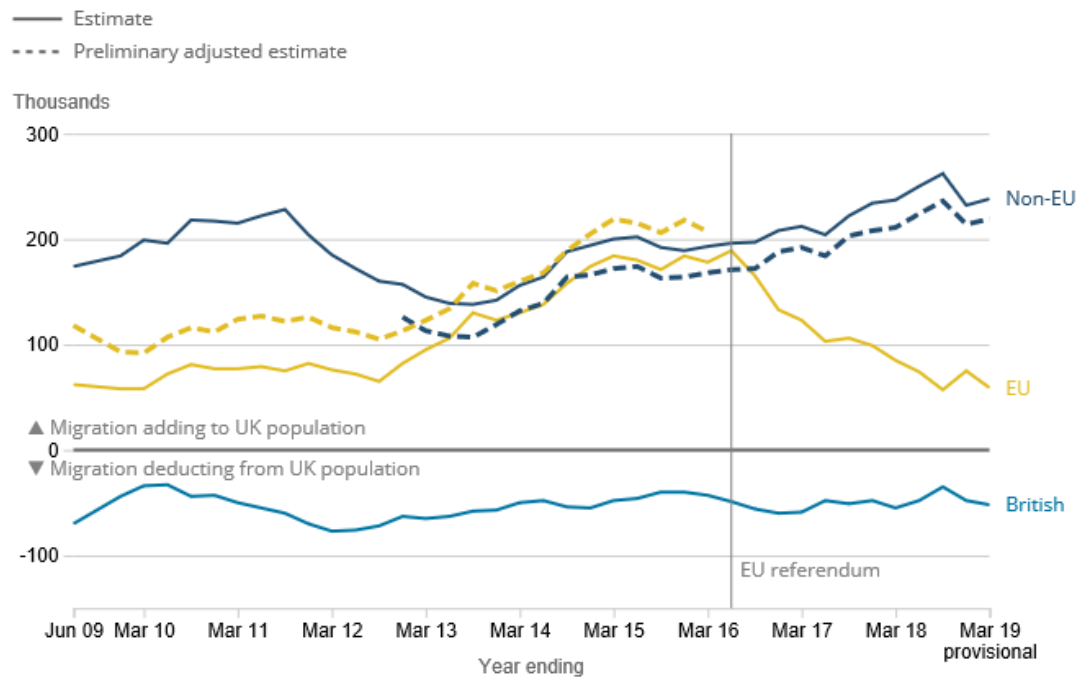
Long-term international migration, UK, year ending June 2009 to year ending March 2019



Source: Office for National Statistics – Long-Term International Migration (LTIM), LTIM with preliminary adjustments based on DWP and Home Office data

Non-EU net migration has increased since 2013, while EU net migration has decreased since 2015

Net migration by citizenship, UK, year ending June 2009 to year ending March 2019



Source: Office for National Statistics - Long-Term International Migration (LTIM), LTIM with preliminary adjustments based on DWP and Home Office data

Changing population



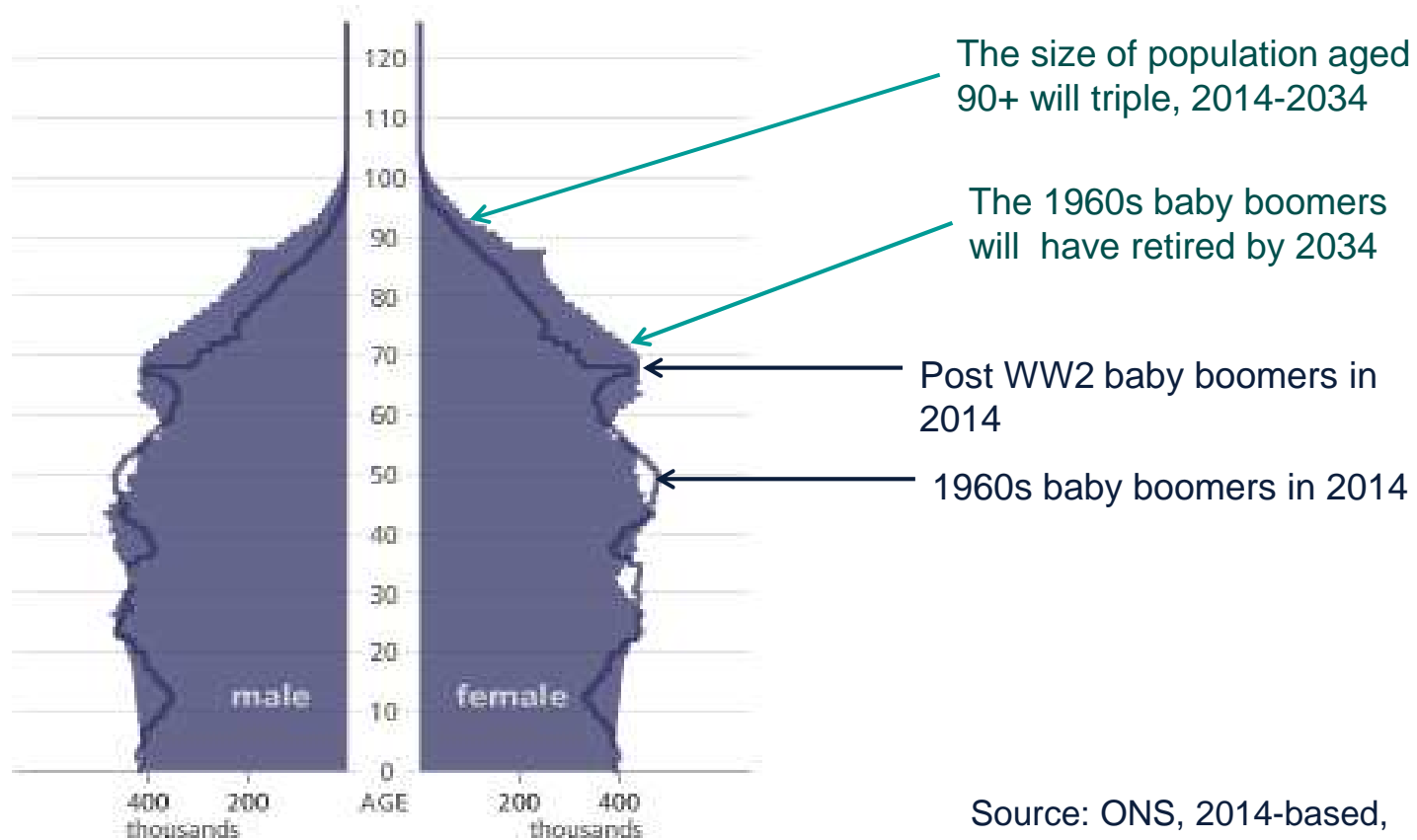
Changing population

- An ageing population

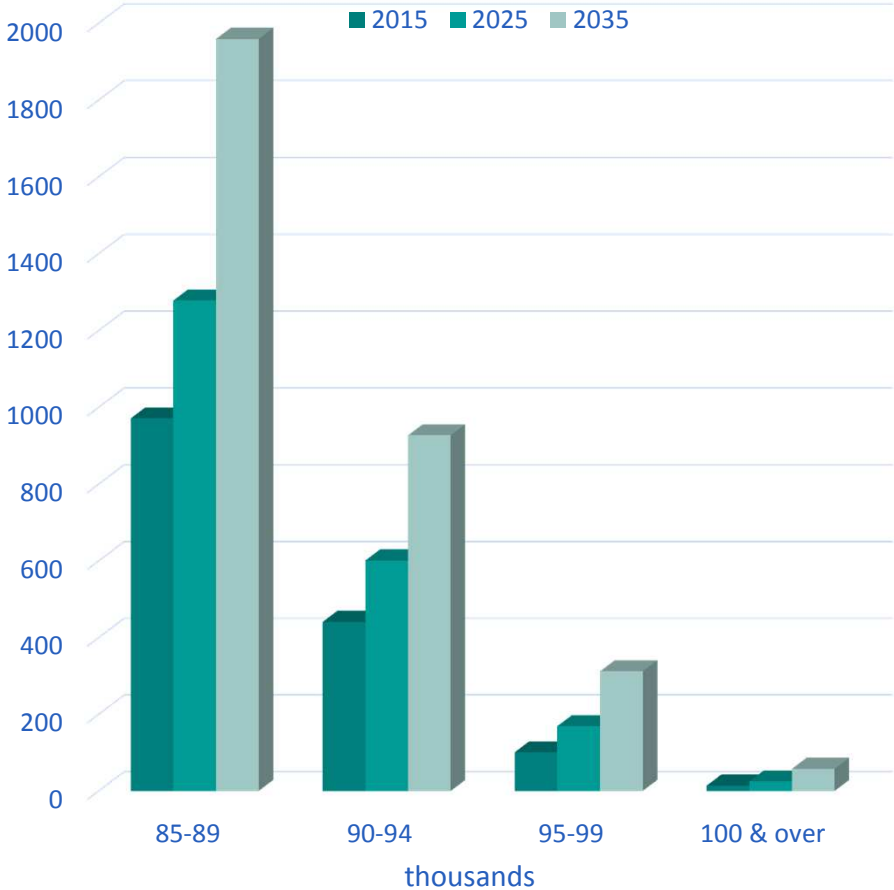


An ageing population

UK Age, sex pyramid 2014 (line) & 2034 (shaded)



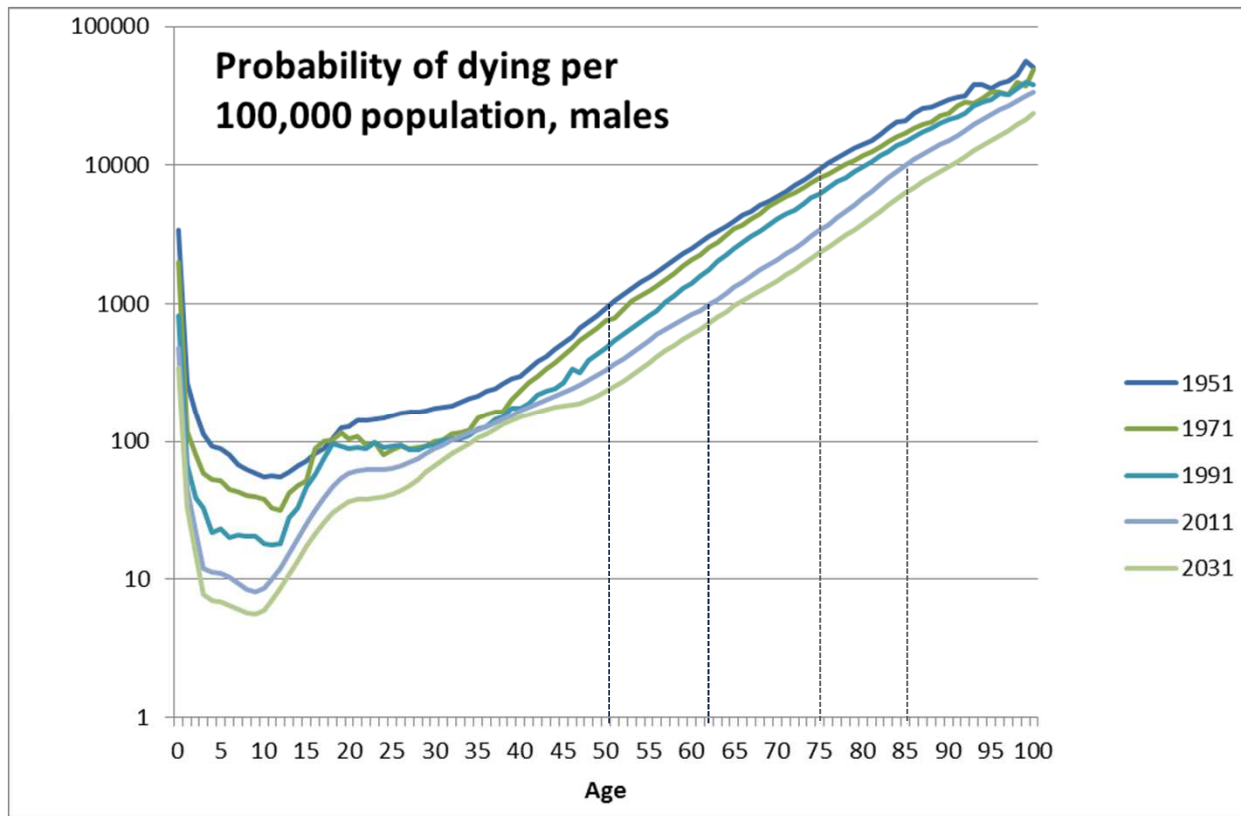
Projected population aged 85 and over, UK 2015, 2025 and 2035



Source: ONS (2017) *National Population Projections, 2016-based projections*

The changing meaning of age

Age at which there is a 1% and 10% probability of dying, 1951-2011



Source: author's own analysis based on UK life tables (ONS, 2012)



The changing meaning of age

	1% chance of dying	10% chance of dying
Men 1951	50	75
Men 2011	62	84
Women 1951	56	78
Women 2011	67	87

For men, 62 is the new 50; and 84 is the new 75!

Source: Author's own analysis based on ONS (2012) UK Life Tables



CELEBRATING 125 YEARS OF EXPLORATION


Siberian Paradise | Mixed Blessing of Fertilizer

NGM.COM MAY 2013


NATIONAL GEOGRAPHIC

THIS BABY WILL LIVE TO BE 120*

*It's not just hype. New science could lead to very long lives.



04.99



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FEBRUARY 23 / MARCH 2, 2015

SPECIAL HEALTH DOUBLE ISSUE

TIME

THIS BABY COULD LIVE TO BE 142 YEARS OLD

Dispatches From the Frontiers of Longevity



time.com

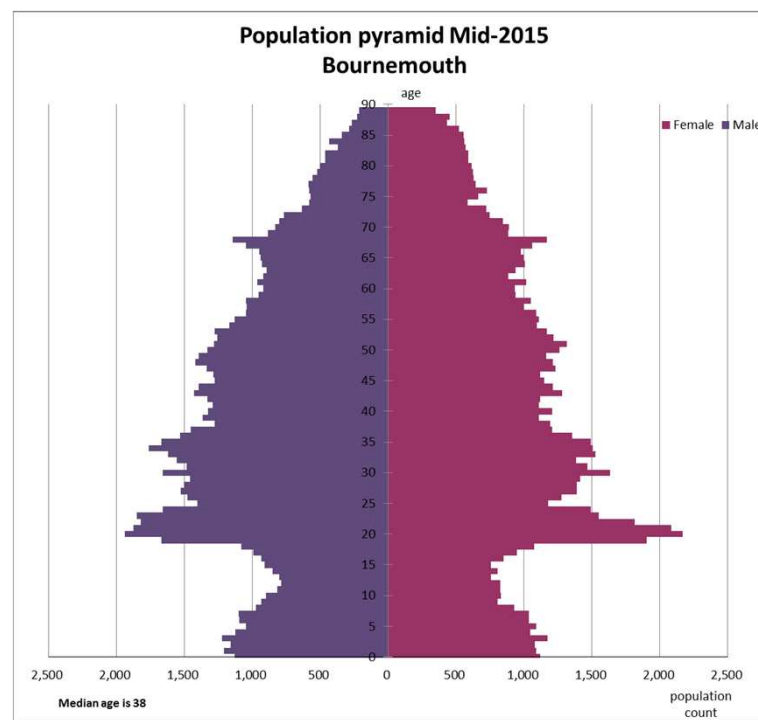
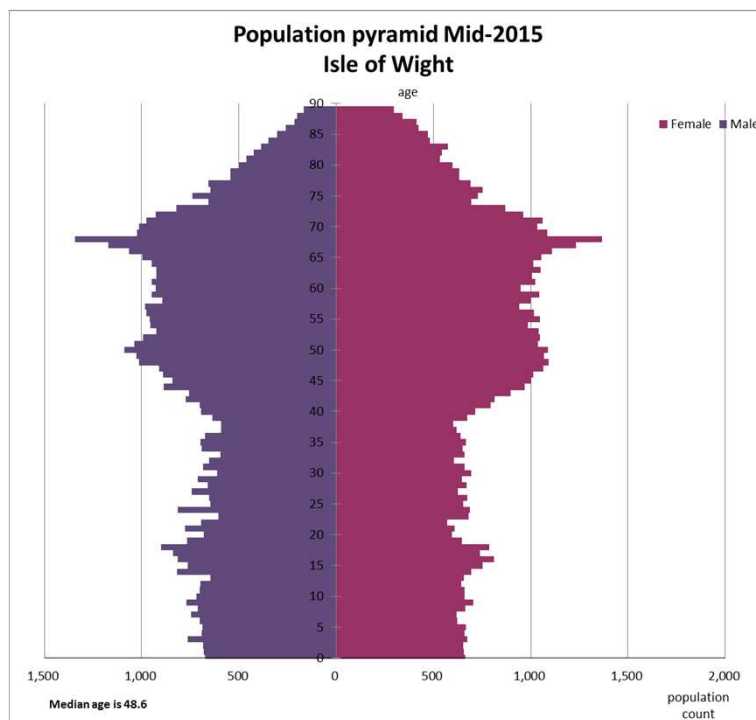


Age at which at least 50 percent of a birth cohort is still alive

Country	Birth year							
	2000	2001	2002	2003	2004	2005	2006	2007
Canada	102	102	103	103	103	104	104	104
Germany	99	100	100	100	101	101	101	102
France	102	102	103	103	103	104	104	104
Italy	102	102	102	103	103	103	104	104
Japan	104	105	105	105	106	106	106	107
Netherlands	100	100	100	100	101	101	101	102
United Kingdom	100	101	101	101	102	102	103	103
USA	101	102	102	103	103	103	104	104

Source: Vaupel, 2010

Place matters ... big regional differences in age structures



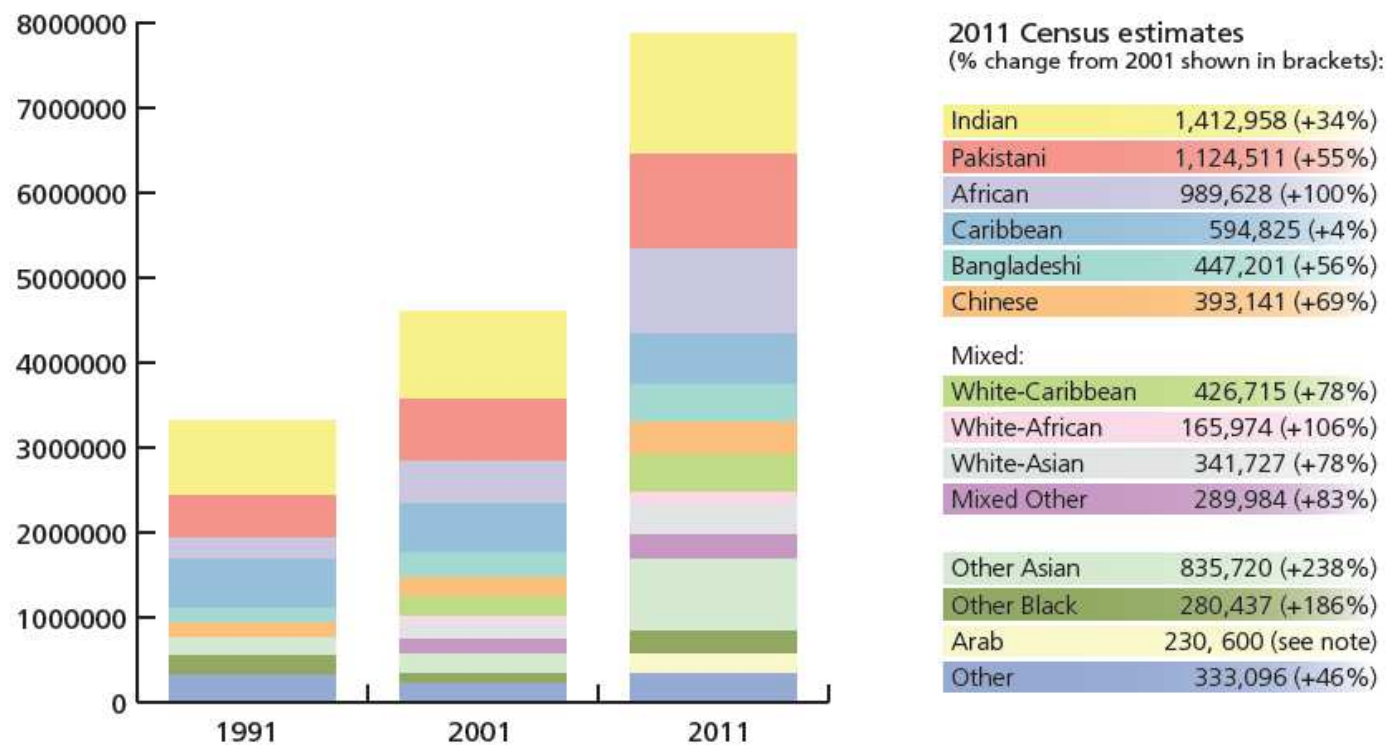
Changing population

- An ageing population
- An increasingly diverse population



An increasingly diverse population

- Growth in ethnic minority group population, Eng & Wales

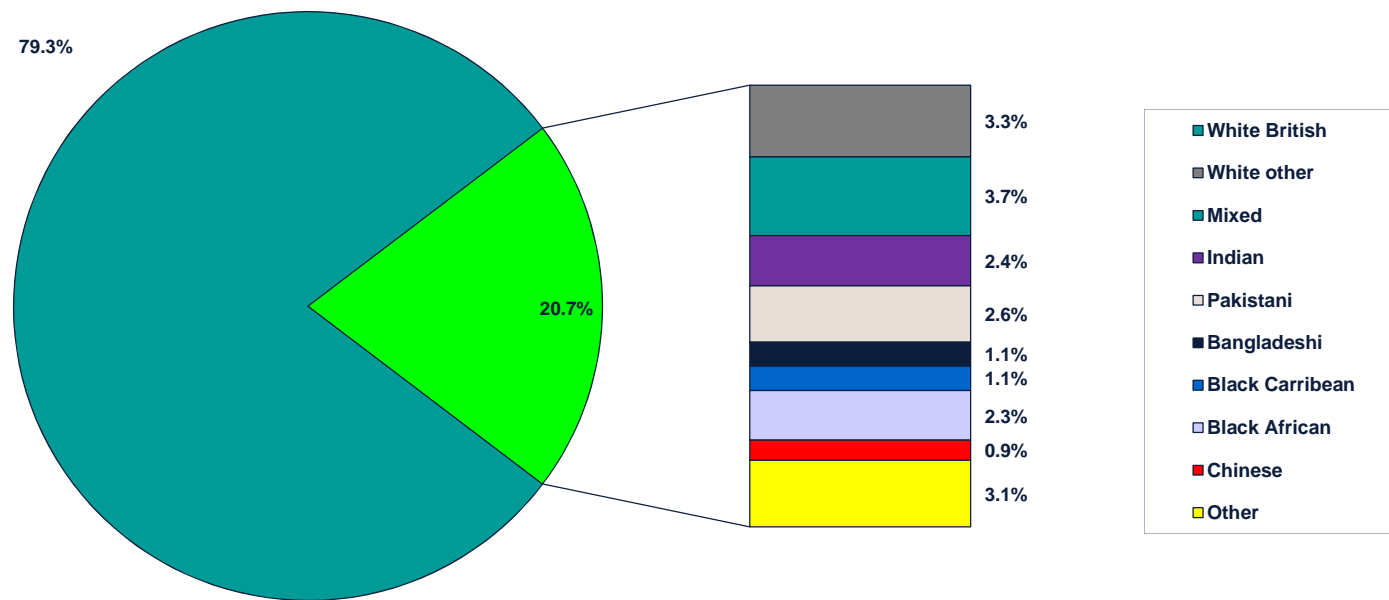


Note : No Mixed category in 1991. No Arab category in 1991 and 2001.

Source: Census data analysed by ESRC Centre on Dynamics of Ethnicity (CoDE)

Increasingly diverse *young* population (informs future projections)

Ethnic composition of population aged 15-19, 2011, England & Wales

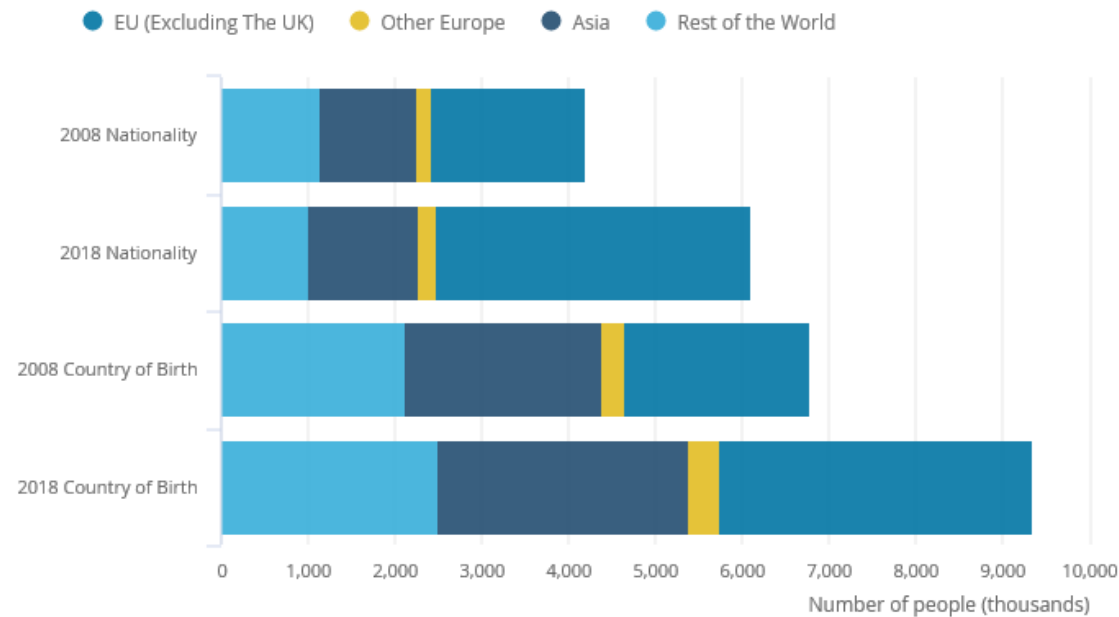


Source: ONS 2011 Census



The population of non-British nationals and those born outside the UK have both increased significant in last decade

Non-British and non-UK-born populations of the UK by country of birth and nationality, 2008 and 2018



Source: Office for National Statistics - Annual Population Survey

Notes:



Estimated population resident in the United Kingdom amongst five most common **countries of birth**, 2016

	Country	Estimate
1	Poland	991,000
2	India	833,000
3	Pakistan	534,000
4	Republic of Ireland	389,000
5	Romania	310,000

- Of the usually resident population in the UK in 2016, around 1 in 7 (14%) were born abroad.

Source: ONS (2017)



Estimated population resident in the United Kingdom amongst five most common **nationalities**, 2016

	Country	Estimate
1	Poland	1 million
2	India	362,000
3	Republic of Ireland	335,000
4	Romania	328,000
5	Italy	233,000

- 39% of the non-UK born population held British nationality

Source: ONS (2016)

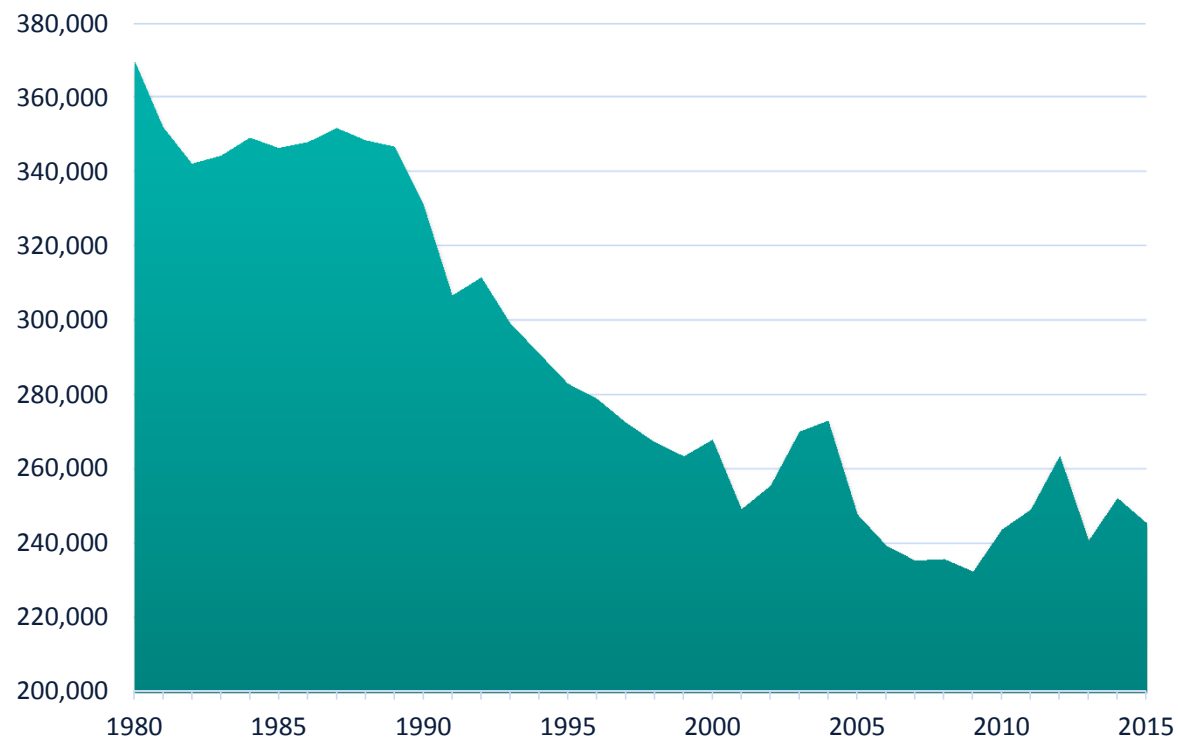


Changing population

- An ageing population
- An increasingly diverse population
- Changing family structure

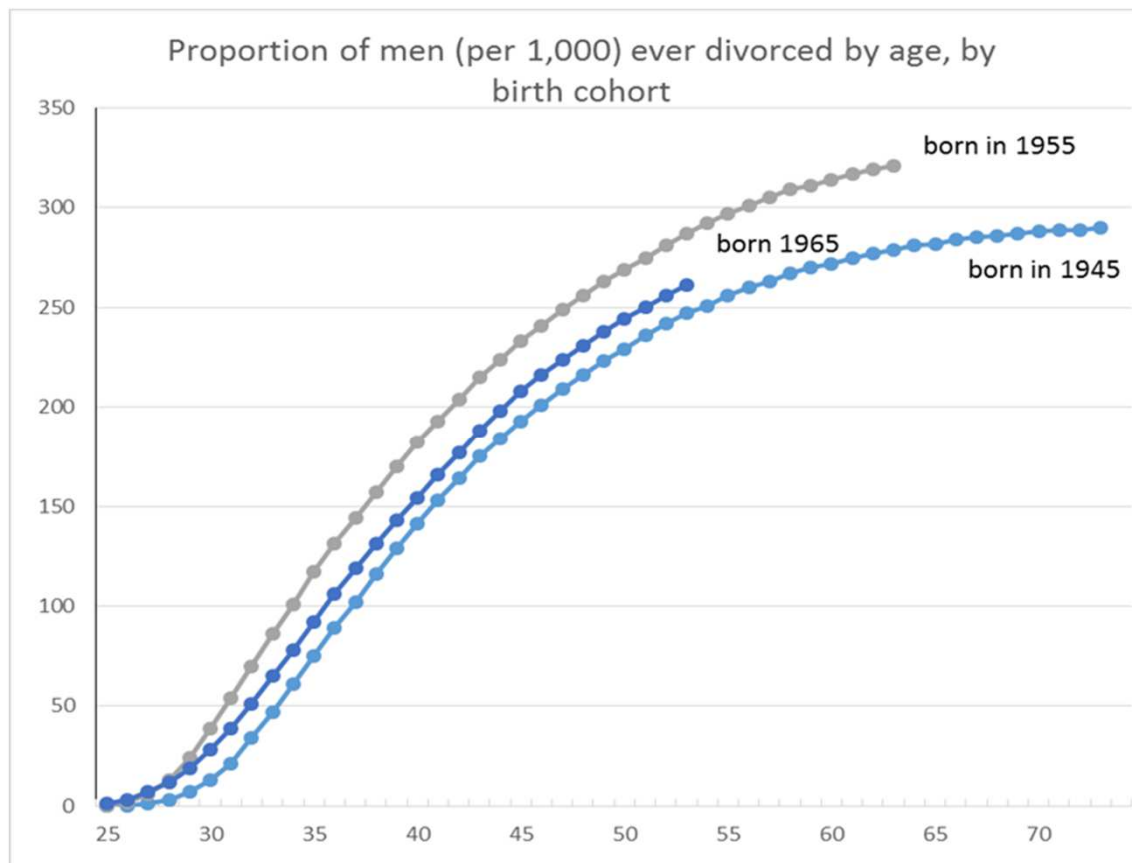
Declining marriages (but recent revival?)

Number of marriages, England & Wales 1980-2015



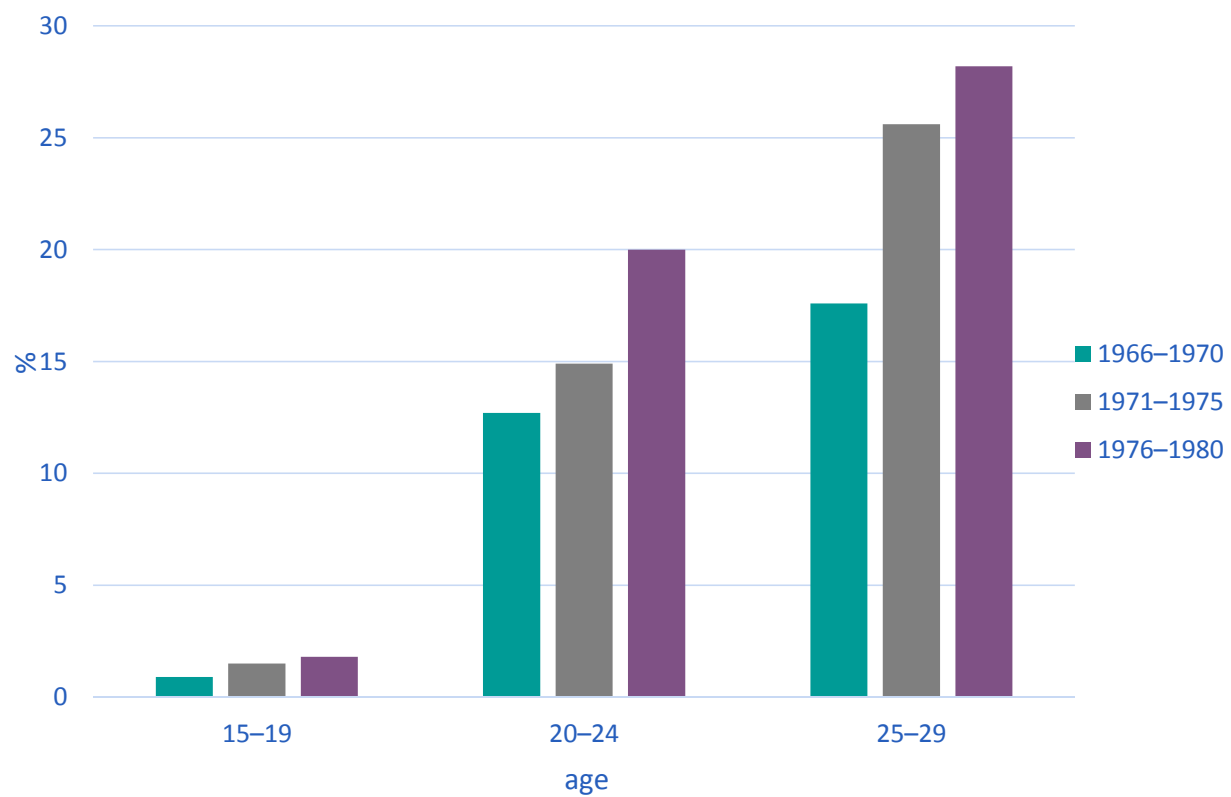
Source: ONS (2018) Marriage Statistics

And, more likely to experience divorce



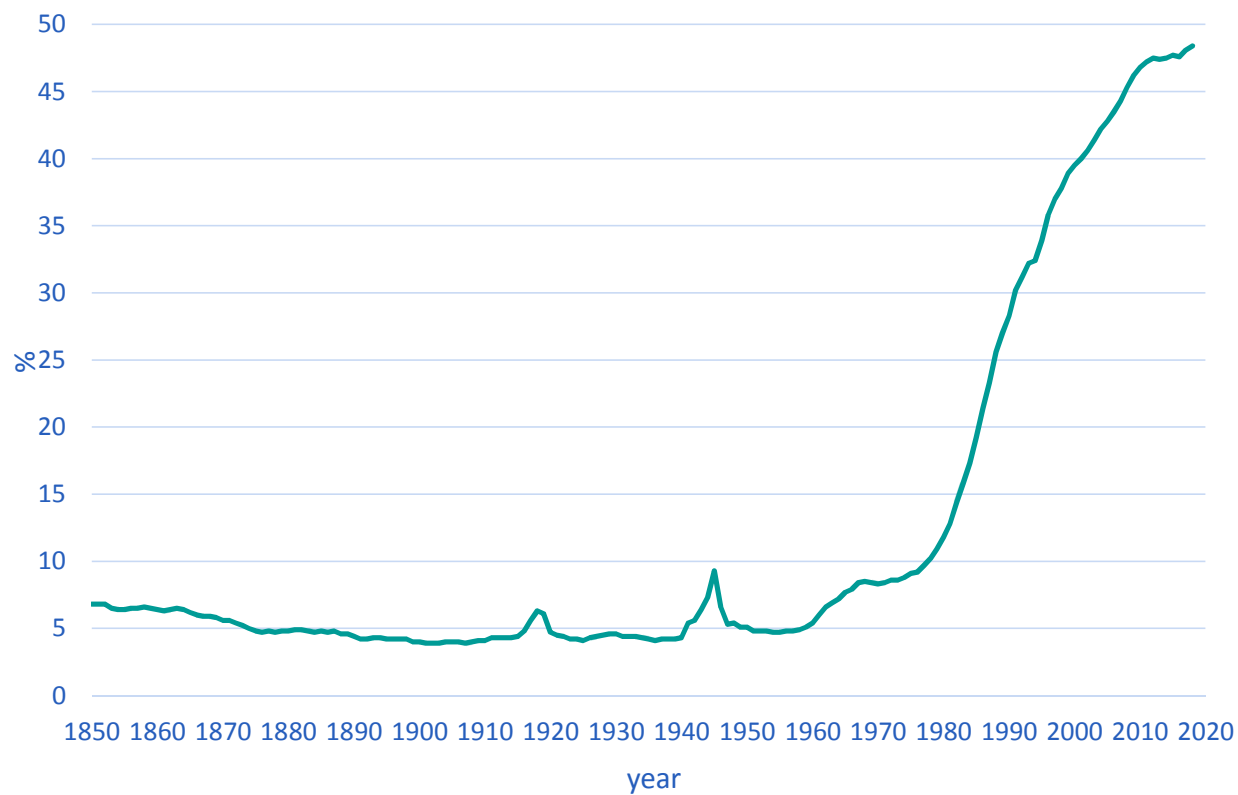
Increasing cohabitation

Proportion of individuals cohabiting: by year of birth and age



Increasing births outside marriage

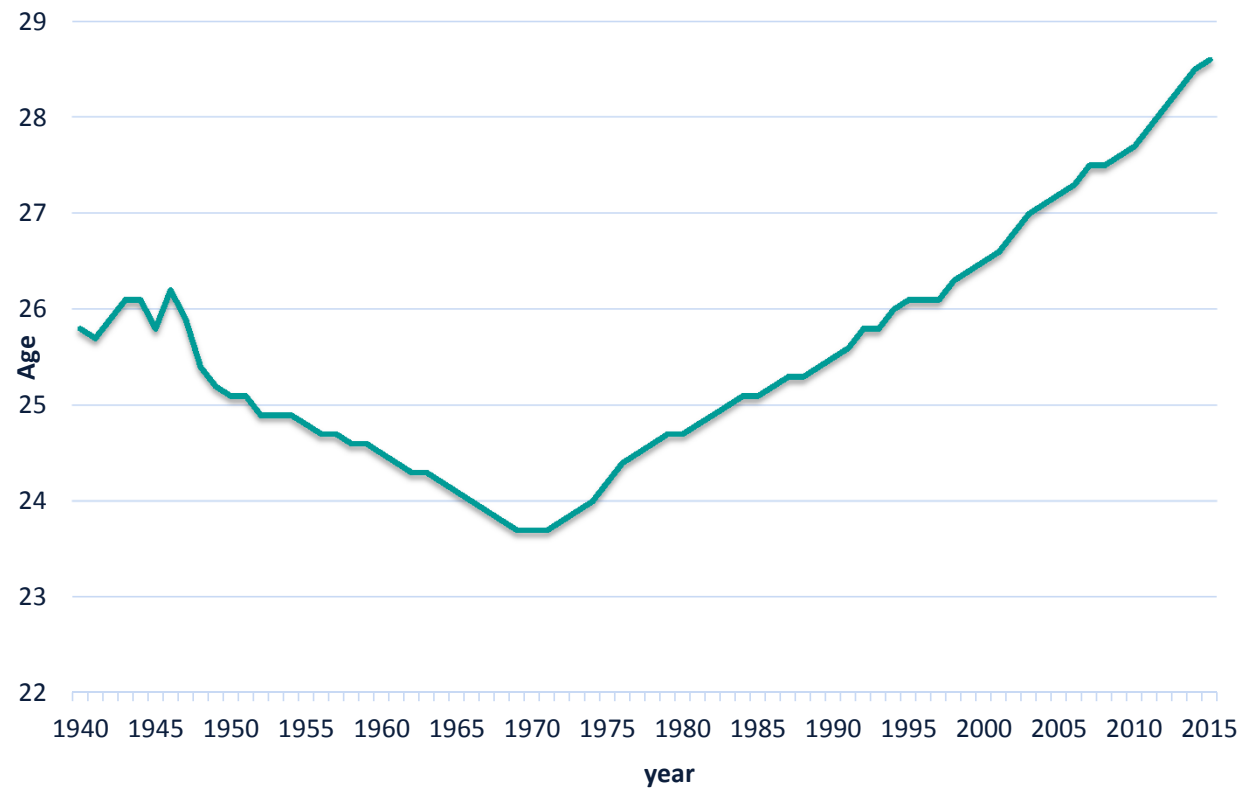
Percentage of all births that occur outside marriage; in 2018 = 48.4%



Source: ONS (2019) Birth Statistics

Increasing age at motherhood

Age at first birth: in 2015 = 28.6 years



Source: ONS (2019) Birth Statistics



Increasing childlessness, but also still significant proportions with 3+ births

Number of children at age 45

Cohort	0	1	2	3	4+
1945	10	14	43	21	12
1950	14	13	44	20	10
1955	16	13	41	19	11
1960	19	12	38	20	11
1965	20	13	38	19	10
1970	17	18	37	17	10

Source: ONS (2016) Birth Statistics

Changing families

- In 2018 there were **19.1 million families** in the UK.
- There were 12.8 million married or civil partner couple families in the UK; this was the most common type of family.
- Cohabiting couple families were the fastest growing family type between 1998 and 2018, more than doubling from 1.5 million families to 3.4 million families.
- In 2018, **around 25% of young adults aged 20 to 34 (3.4 million)** were living with their parents, increasing from 21% in 1996.
- In 2018, around **8 million people lived alone in the UK**, the majority were women.

theguardian

News Sport Comment Culture Business Money Life & style

Life & style Family

Generation boomerang: children who go back to mum and dad

Once upon a time, children grew up and left home. Not any more. Meet the new adultescents

Sally Koslow and Hannah Booth
The Guardian, Friday 24 August 2012 23.01 BST

Jump to comments (181)



'They're ridiculously supportive,' says Gareth Johnson, with parents Carl and Eunice, and nephew Seth. Photograph: Lucy Levene

After my sons graduated and left home, my husband and I adjusted. It wasn't hard. Yes, we fondly recalled folding dryer-warmed T-shirts commemorating rock concerts and seeing our sons' stubbly faces as they stumbled out of bed after a hard night. But it was pretty damn roomy, that nest... until it wasn't empty any more.



Summary, in future we will

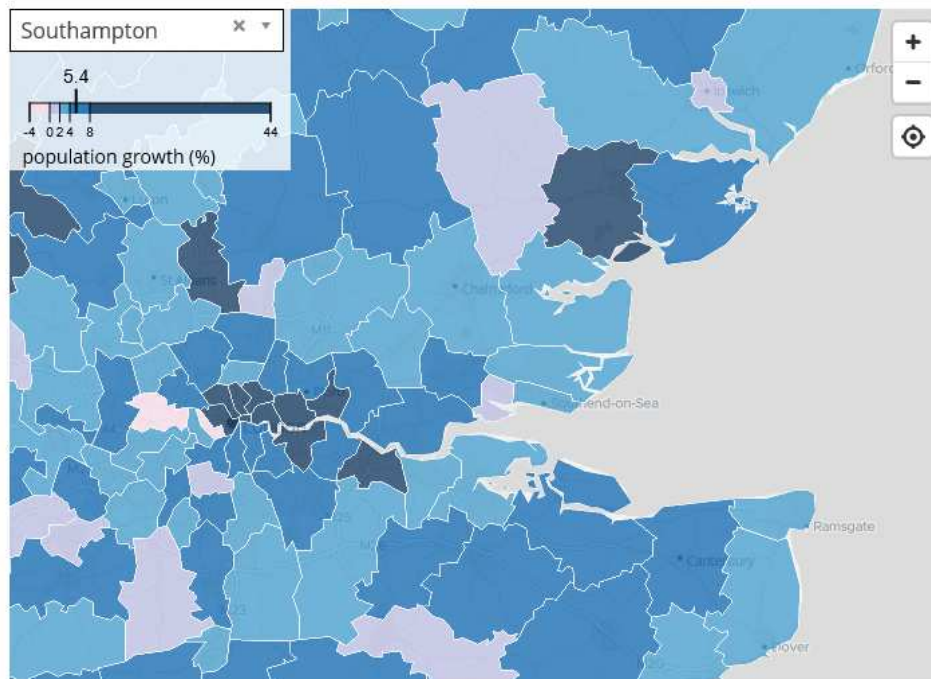
- Have a larger population
- Be living longer
- Be more diverse, in terms of
 - Ethnicity
 - Family & households
 - More blended families; more people living alone (and for longer)

The changing population of the Thames Gateway



A growing population

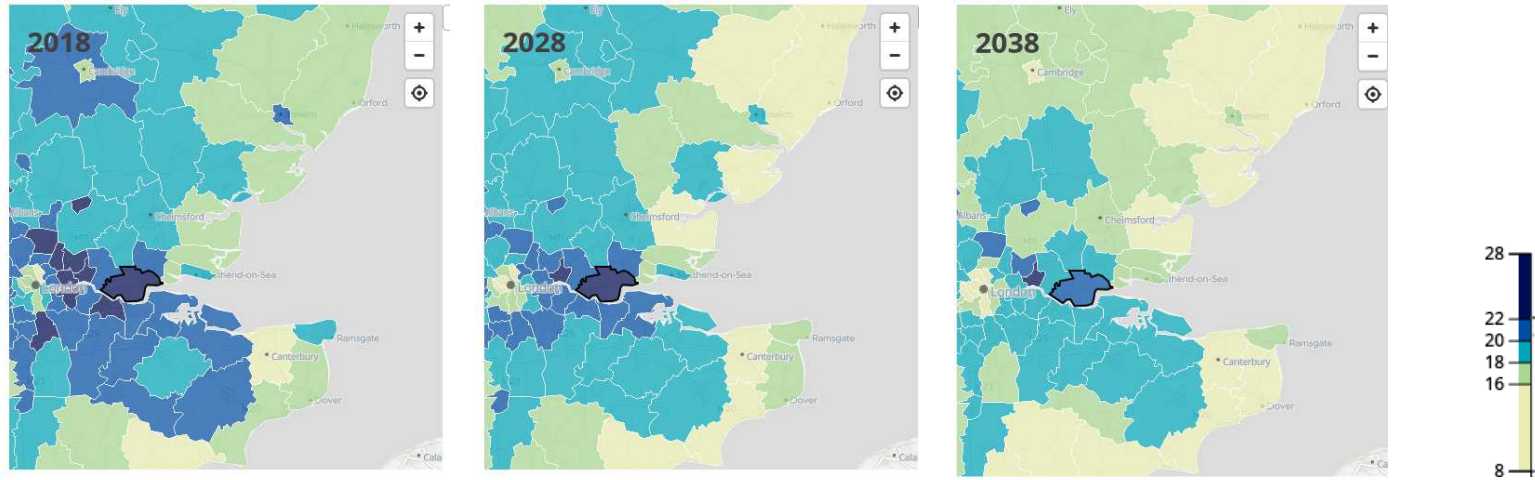
Population growth by local area mid-2013 to mid-2018, local authorities in UK



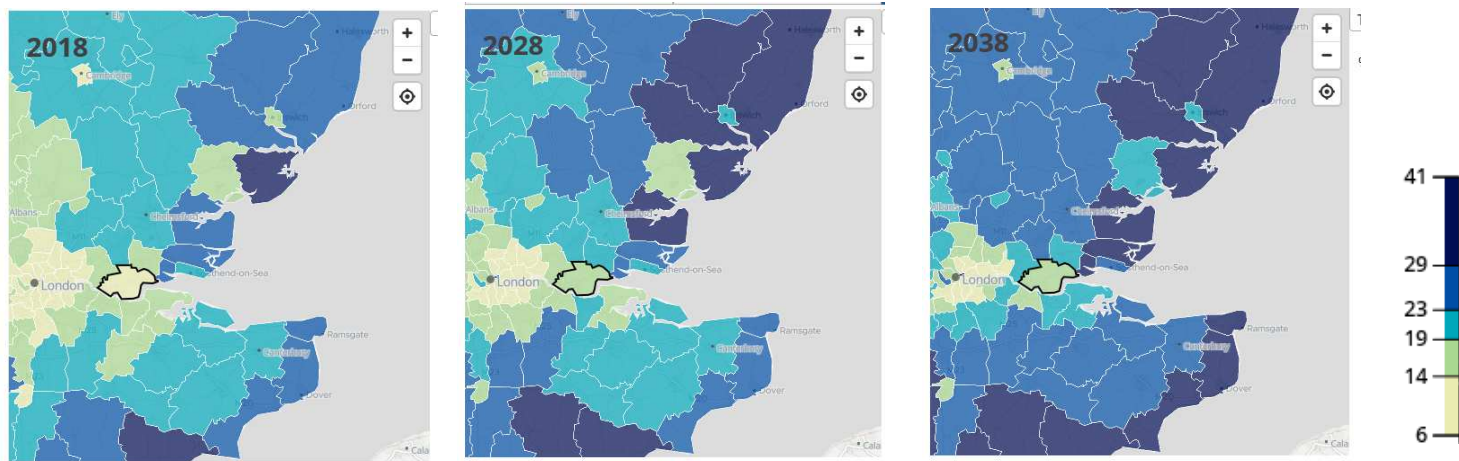
Source: Office for National Statistics, Northern Ireland Statistics and Research Agency, National Records of Scotland

- Barking & Dagenham 9.0%
- Bexley 4.4%
- Castle point 1.7%
- Dartford 9.3%
- Greenwich 8.4%
- Gravesend 2.9%
- Havering 6.5%
- Medway 2.5%
- Newham 9.5%
- Southend-on-sea 3.5%
- Swale 6.6%
- Thurrock 7.0%
- Tower Hamlets 16.1%

Declining % population aged under 16 (but not everywhere)



Growing % population aged 65 plus (but not everywhere)





Homes for the 100 year life

- 80% of the homes that we will all be living in by 2050 are likely to be already built
- only 4% of older households are currently living in properties built specifically for older people
- Only 7% of homes meet basic accessibility features
- building all new homes to be flexible and accessible and suitable for all ages needs to be a priority



UNIVERSITY OF
Southampton

ESRC Centre for Population Change

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Twitter: [@CPC_population](https://twitter.com/CPC_population)

Facebook: [CPCpopulation](https://www.facebook.com/CPCpopulation)

Mendeley: [CPC Population](https://www.mendeley.com/groups/CPC-Population)

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PANEL: HOMES

Lyn Carpenter

Chief executive, Thurrock Council

Prof Jane Falkingham

Director, ESRC Centre for
Population

Geoff Pearce

Executive director of regeneration
and development, Swan Housing
Association

Bob Weston

Chairman, Weston Homes

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HEATHER CAREY

Director, Work Foundation



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Preparing for the future of work

Heather Carey
Director
Work Foundation

**Thames Estuary
Growth Day**
3rd October 2019

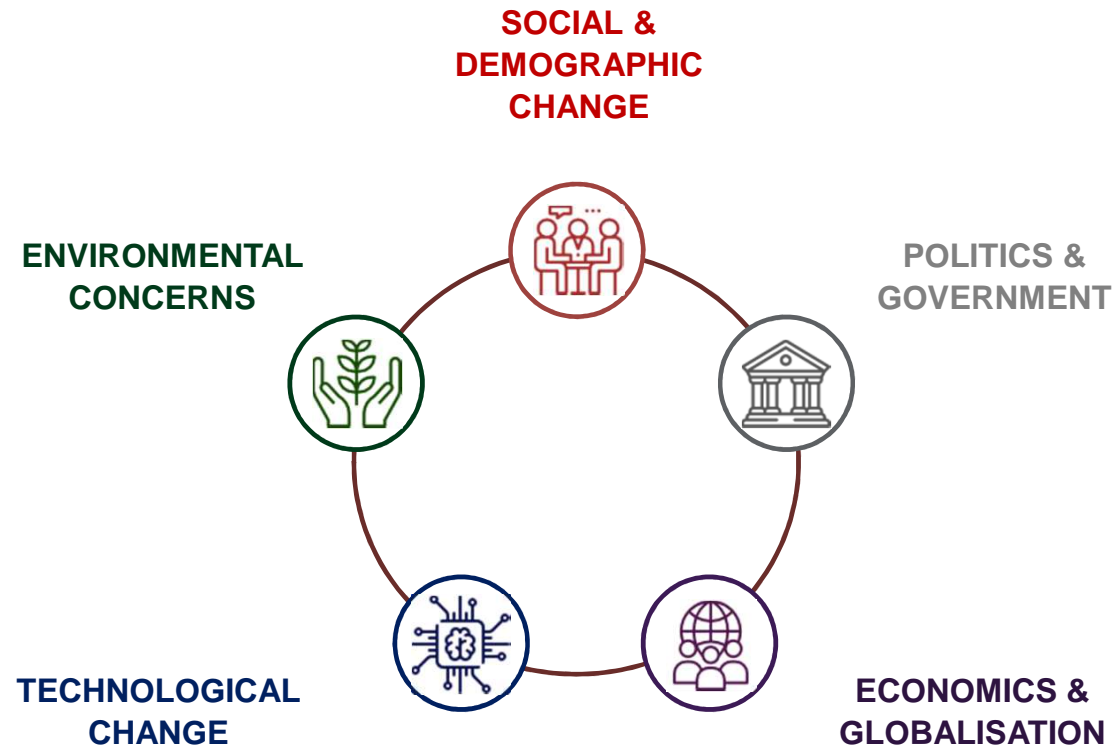


Overview

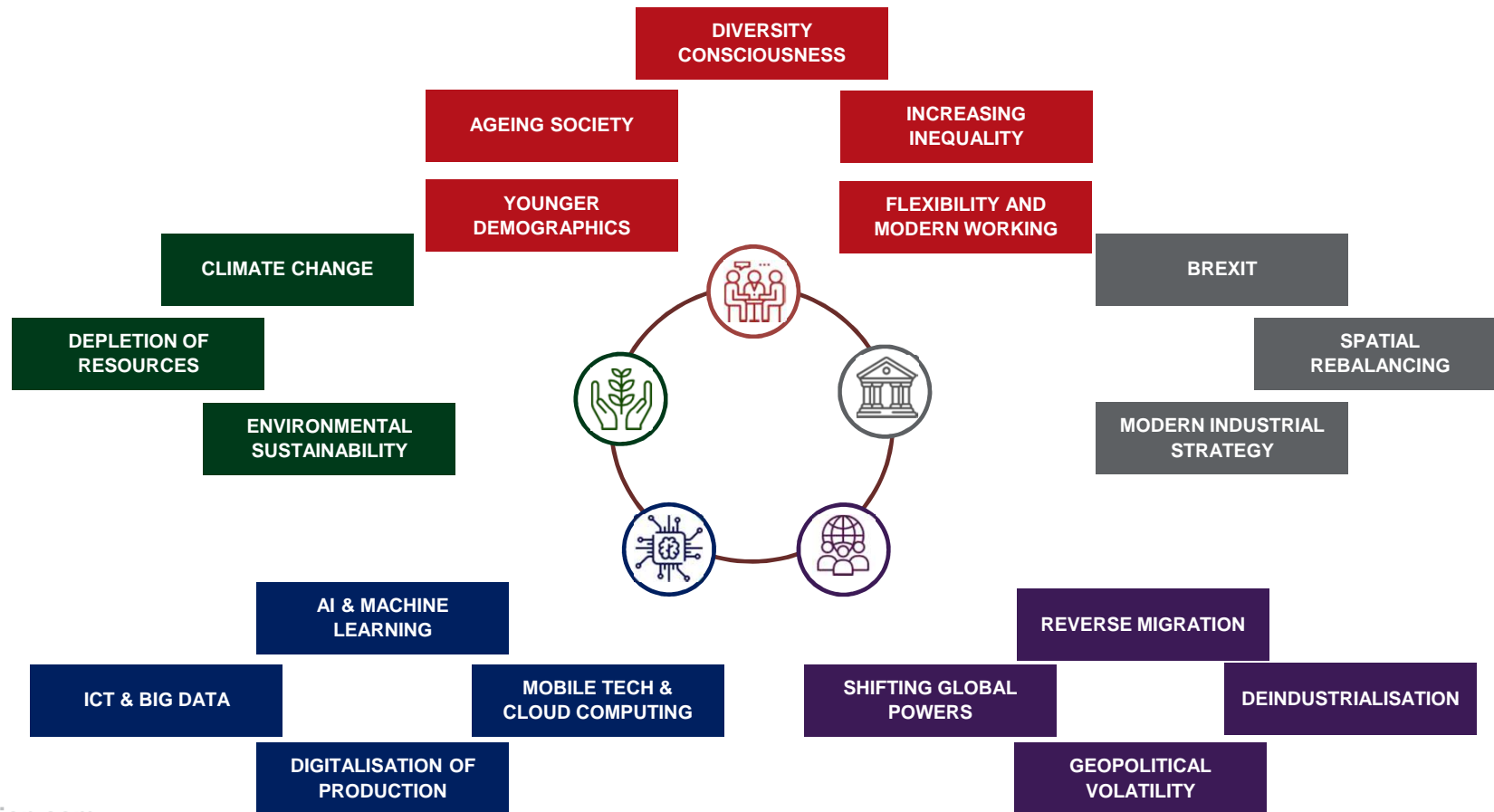
1. Megatrends impacting the future
2. 8 key shifts in the world of work
3. Key questions for the Thames Estuary



'Megatrends' are driving shift across the globe...



These encapsulate a whole host of trends that are shaping the world of work



How are these trends shaping the world of work?

1. Tightening of the labour market

- Employment rate & job vacancies at record highs
- **Recruitment difficulties** impacting many businesses / sectors
- Competition for talent, as employers face **skill shortages & gaps**

INDEPENDENT

Nine in 10 UK employers struggling to find skilled workers with Brexit set to make shortage worse, survey finds

Home > UK & Europe > Turnover troubles top the problems in recruitment for IT sector.

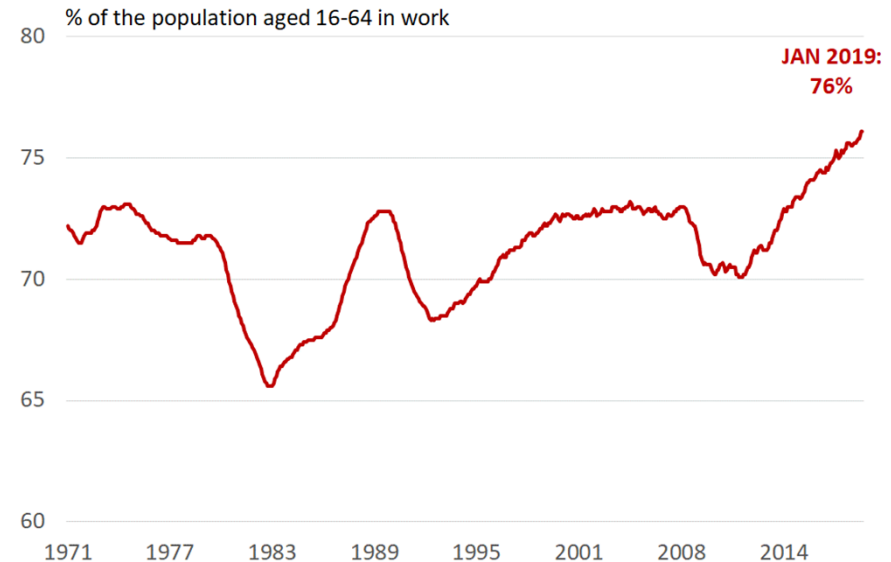
Turnover Troubles Top The Problems In Recruitment For IT Sector.

Keeping the IT crowd.

By Newsdesk — On Apr 2, 2019



theworkfoundation



Source: Office for National Statistics, April 2019

226,000

skills shortage vacancies
in the UK
[ESS 2017]

66%

Businesses not confident
there will be enough highly-skilled
people in the future
[CBI / Pearson 2018]



How are these trends shaping the world of work?

2. Automation

- Huge interest in the impact of automation on jobs
- Despite the hype, most recent evidence suggests 7% - 14% of jobs in the UK at high risk of automation

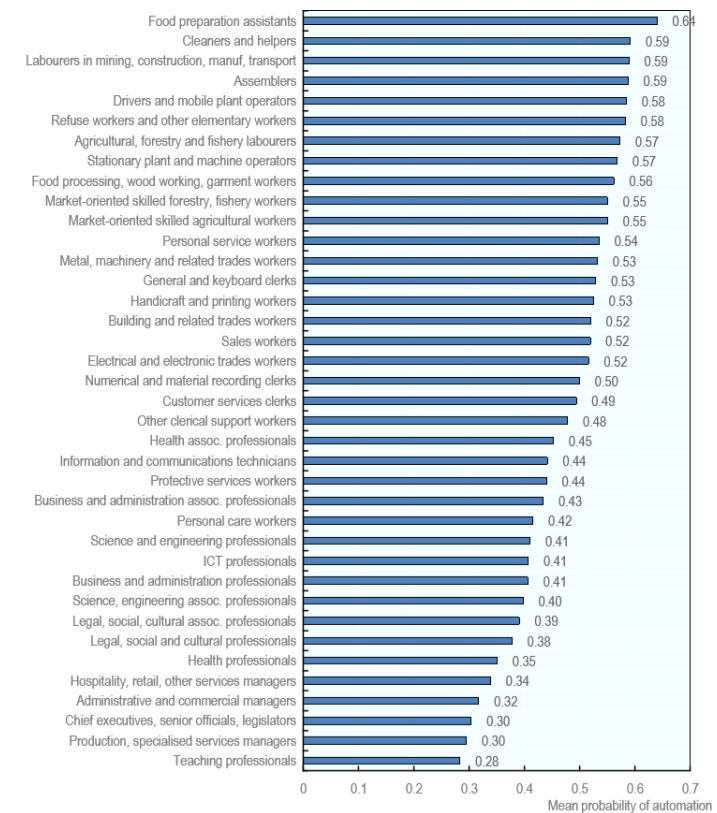
Robots could wipe out 1.3 million Wall Street jobs in the next 10 years



Automation threatens 1.5 million workers in Britain, says ONS



Potential for automation by occupation, 32 OECD countries



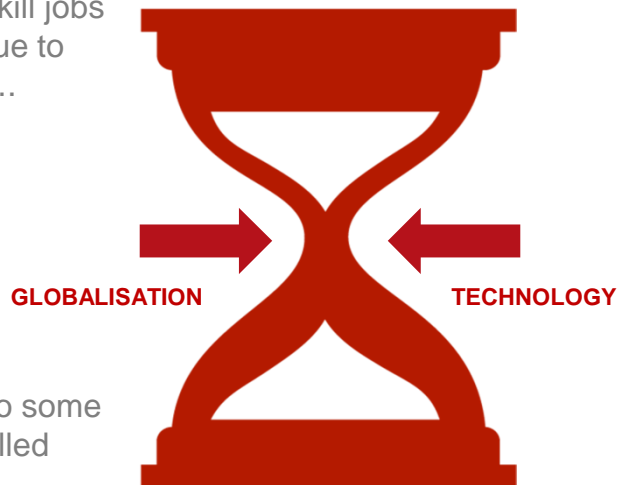
Nedelkoska, L. and G. Quintini (2018), "Automation, skills use and training", OECD

How are these trends shaping the world of work?

3. Job polarisation & evolution

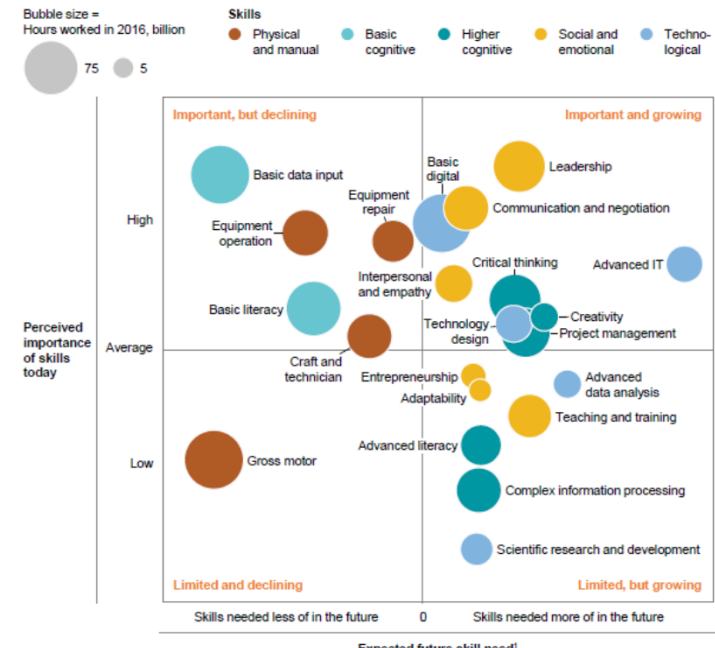
- 'Hollowing' of the labour market expected to continue, with a decline in middle skill roles

High skill jobs continue to grow....



...as do some low skilled roles

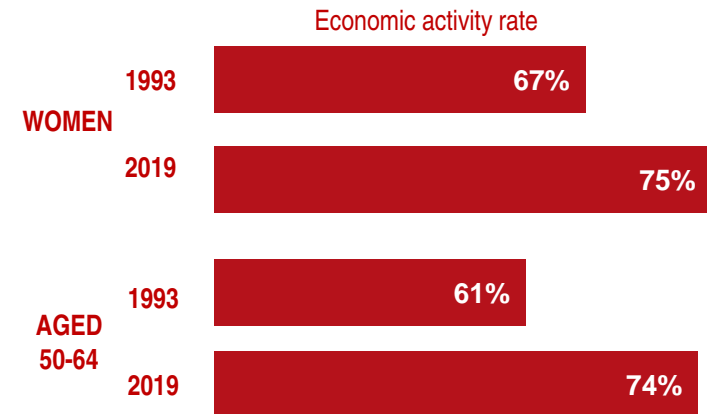
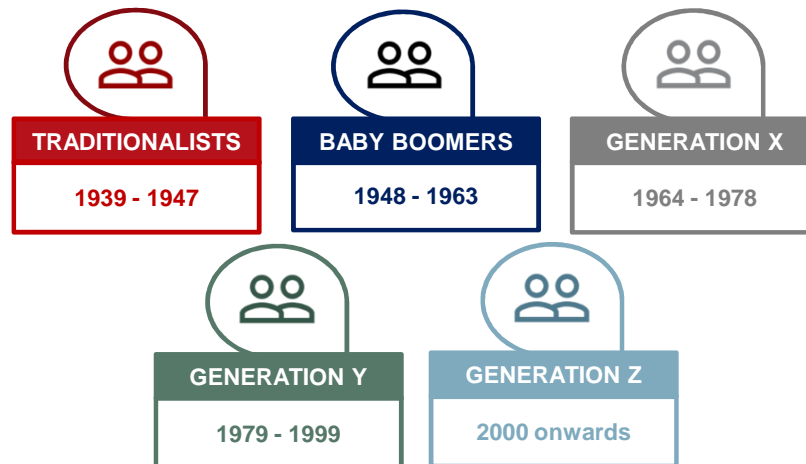
- Greater likelihood that roles & the skills needed within them will change: affecting around 25% jobs in the UK



How are these trends shaping the world of work?

4. Growing diversity & the rise of 5G workplaces

- More **women** in work, but ongoing challenges around gender equality
- Ageing** of the workforce, as people work for longer
- Soon to be **5 different generations in the workplace** – with different needs, perspectives & values



ONS 2019

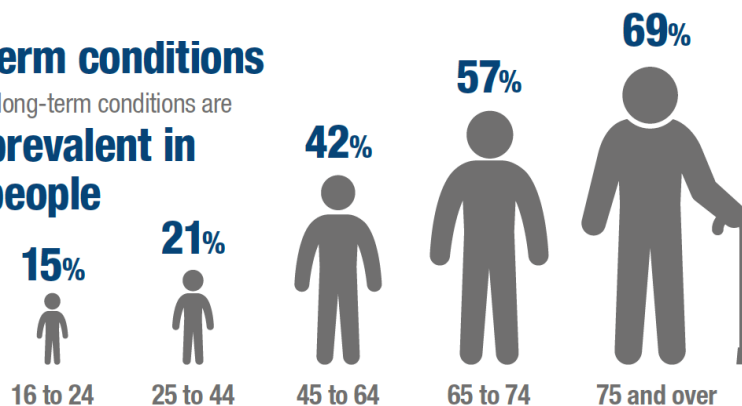


How are these trends shaping the world of work?

5. Workplace health becoming a business imperative

- Ageing of the workforce expected to impact long-term conditions
- Work intensity and stress on the rise, with growing concerns around physical and mental ill health
- Sickness absence costing businesses & UK plc dearly
- **Promoting workplace health high up the agenda** for more and more businesses

Long-term conditions and limiting long-term conditions are more prevalent in older people



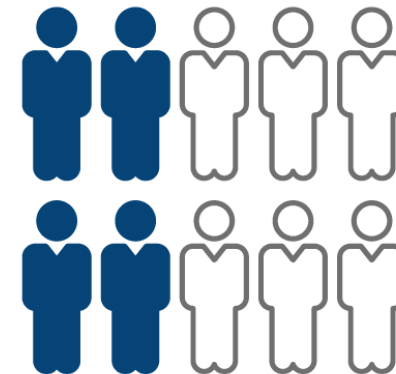
theworkfoundation.c

The combined costs

of sickness absence, lost productivity through worklessness, and health-related productivity losses, are estimated to be over

£100bn annually

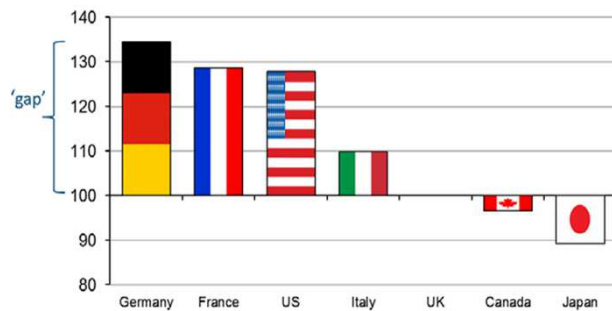
By 2030 **40%** of the working age population will have a long term condition



How are these trends shaping the world of work?

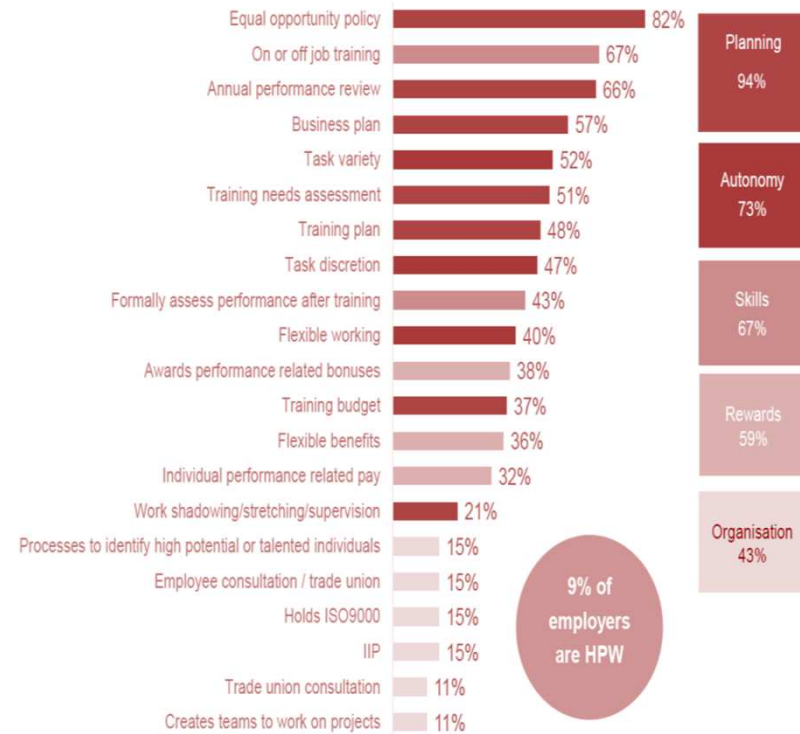
6. Management practices & high performance working

Index of GDP per hour worked, 2016 (UK= 100)



BEIS 2018

- Growing evidence that the productivity problem a result of management deficit
- In the face of tightening labour market, businesses looking at how to retain & maximise talent
- Yet in reality, few businesses are deploying the high performance **working practices that unlock the power of their people**



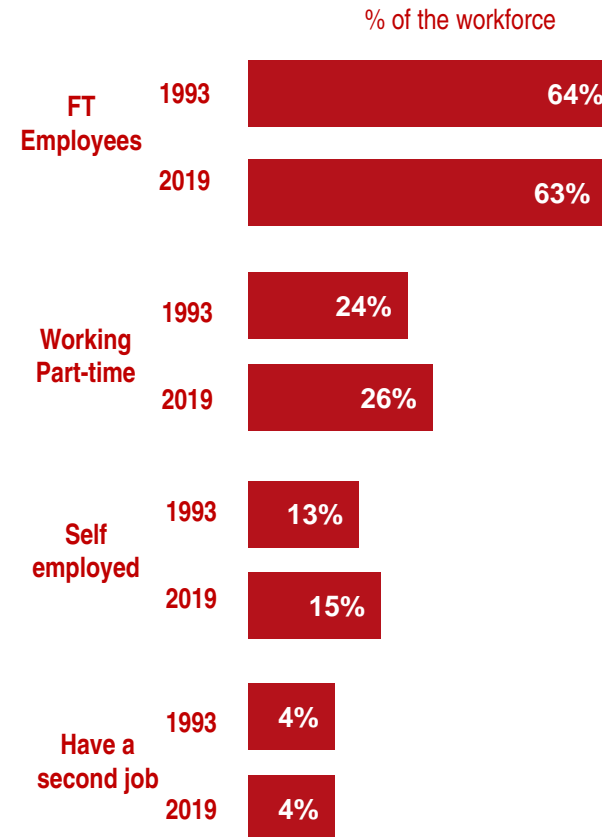
ESS 2017

How are these trends shaping the world of work?

7. Atypical and platform working on the rise



- Despite growing interest in platform working and the 'gig' economy, **traditional forms of work still dominate**
- Part-time work and self-employment are on the increase, BUT still are only a little higher than two decades ago



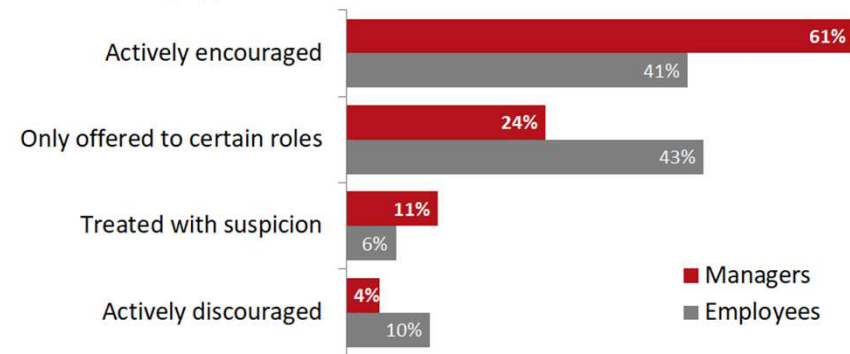
ONS 2019

How are these trends shaping the world of work?

8. Flexible working & changing perceptions of work

- Around 1 in 3 work flexibly
- With a growing number of those “born digital” in the workforce & tech advancement this could reach a ‘**tipping point**’
- BUT technological; organisational; and individual barriers continue to act as constraints
- Flexible working & wider trends are however changing our views on work, with more and more people valuing their job beyond ‘the money’

Flexible working opportunities are...



15% of employees did not have the appropriate technology to work remotely

6 in 10 people say they would enjoy work even if they didn't need the money



Future-proofing the Thames Estuary vision

Key questions relating to jobs and skills

How can the Thames Estuary...?

	Design & build	Early-stage	Long-term
TALENT PIPELINE	...ensure there is sufficient talent to deliver the project?	...develop strong local skills ecosystems to support growth in new sectors?	...build agility in the skills system to align provision with the changing needs of business?
PRODUCTIVITY	...leverage the build to test new productivity-enhancing tech / materials / methods?	...promote HPW & design workplaces that are productive, healthy and inclusive?	...foster a culture of lifelong learning that promotes upskilling and reskilling?
INCLUSIVE GROWTH	...use the vision as a vehicle to raise aspirations, maximise social impact & leave a skills legacy?	...connect those living in deprived communities with good quality jobs?	...embrace a new economic model centred around inclusive growth and responsibility business?

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PANEL: EMPLOYMENT

Heather Carey
Director, Work Foundation

Neil Impiazzi
Partnership development director,
SEGRO

Jason Robinson
Managing director, Urban Catalyst

Cllr Darren Rodwell
Leader of the London Borough of
Barking and Dagenham

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PLEASE HEAD TO WORKSHOP STREAM



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PANEL: DELIVERY

Lord Kerlake
Chairman, Peabody

Tony Pidgley CBE
Chairman, Berkeley Group

Cllr Darren Rodwell
Leader of the London Borough of
Barking and Dagenham

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SARAH FISH

Associate director, WSP



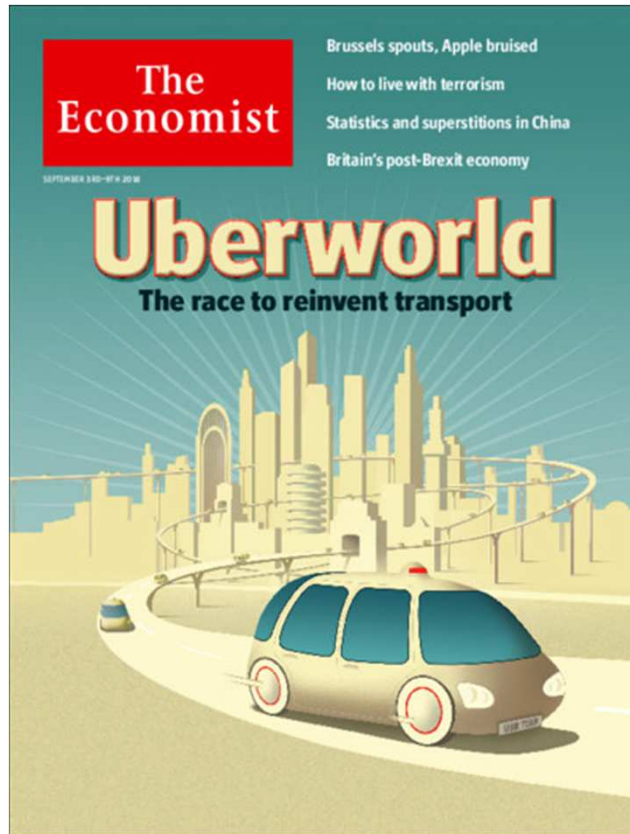


How can connectivity in the Thames Estuary be improved in a sustainable manner?

Sarah Fish, Associate Director, Sustainable Transport Lead

3rd October 2019

Challenges....



“An epic struggle looms... it will transform daily life as profoundly as cars did in the 20th century: reinventing transport and reshaping cities...”

The Economist, September 2016

Challenges and opportunities in the Thames Estuary...

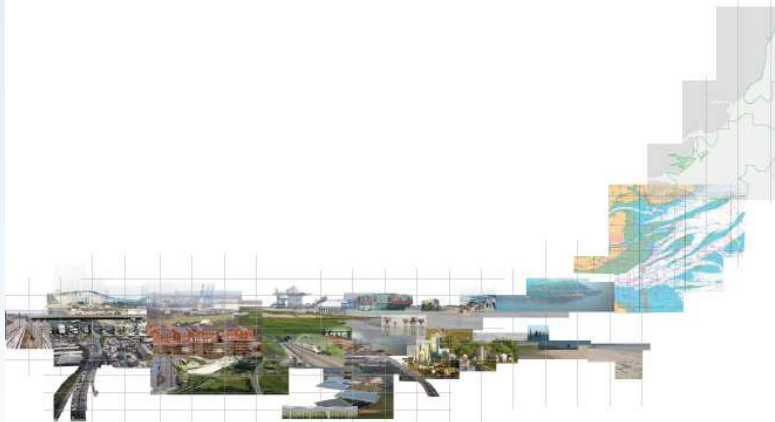
The Thames Estuary:
Opportunities and challenges

April 2016

Thames Estuary 2050 Growth Commission

2050 Vision

June 2016



The Mayor of London's submission to the Airports Commission Outline proposal for long term aviation capacity

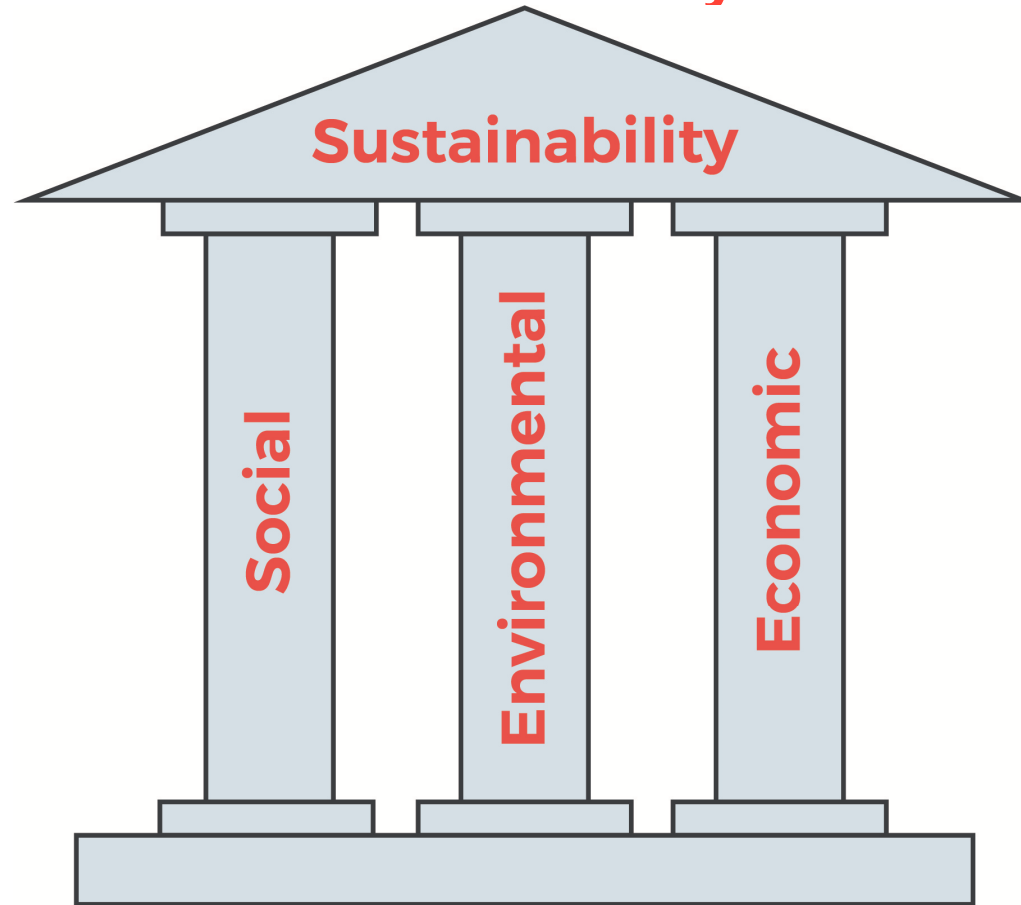


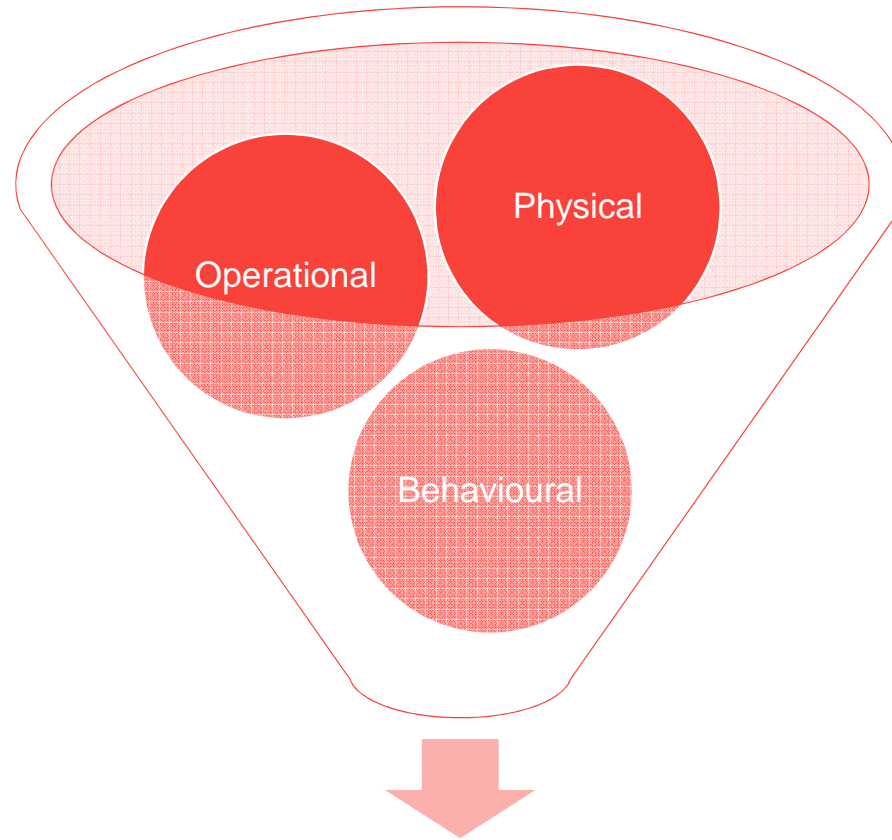
A new hub airport for London and the UK Outer Thames Estuary

July 2013



How do we do this sustainably?





Optimum solution?

Mega trends influencing mobility...

- **Demographic**
- **Social**
- **Environmental**
- **Economic**
- **Political**

- But they are all uncertain....

People, place and activity

*Individuals and businesses **accessing** opportunities and needs*

- **Employment opportunities**

- Educational attainment

- Healthcare needs

- Goods and services

- Raw materials, crops, products & waste

- Social interactions

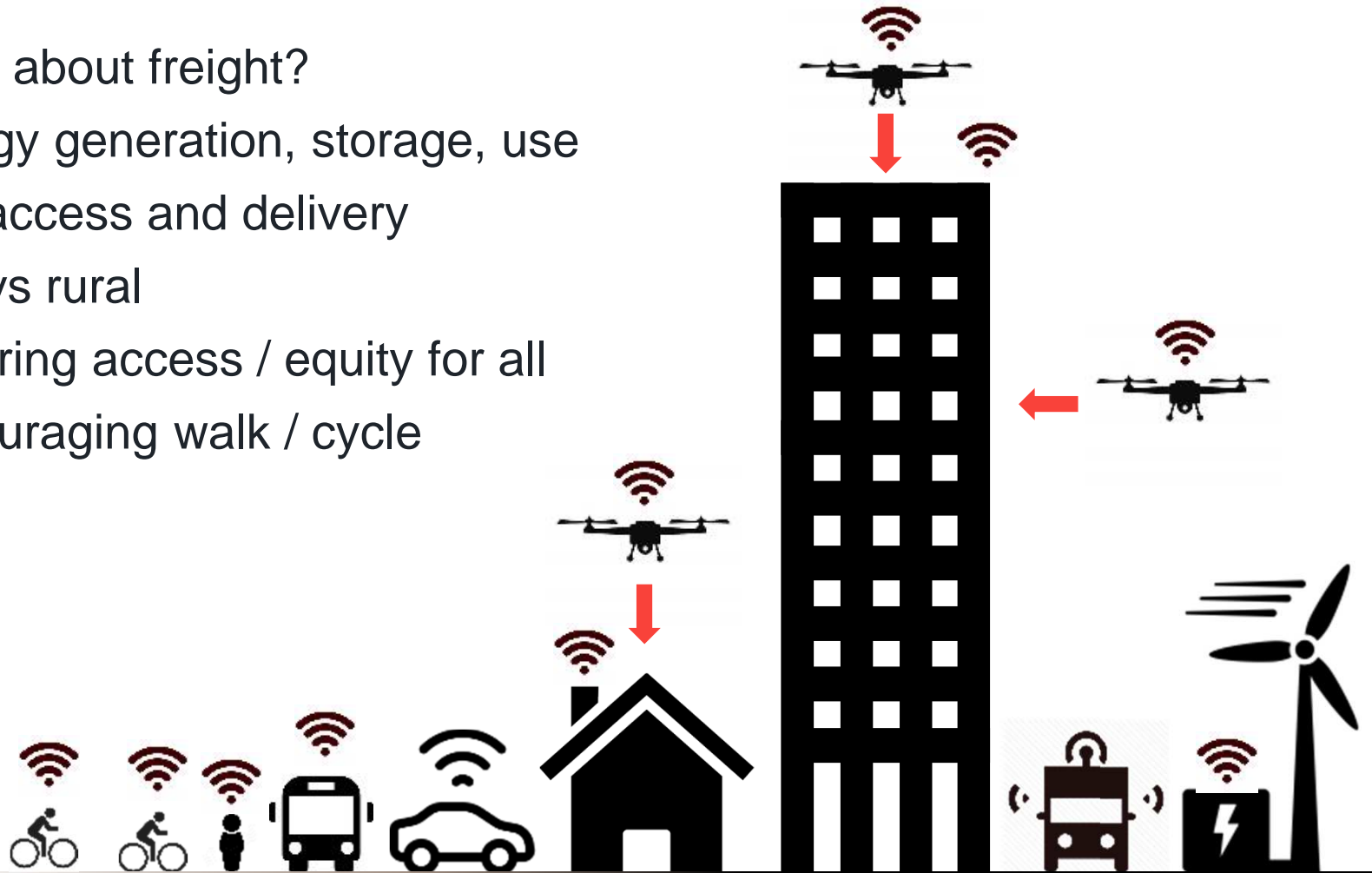
- Retail and leisure

- Tourism

***Fundamental to
economic and
social activities***

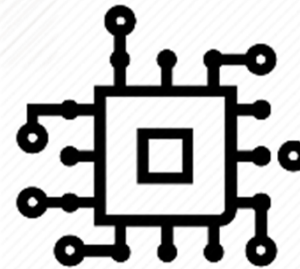
Wider challenges...

- What about freight?
- Energy generation, storage, use
- '3D' access and delivery
- City vs rural
- Ensuring access / equity for all
- Encouraging walk / cycle



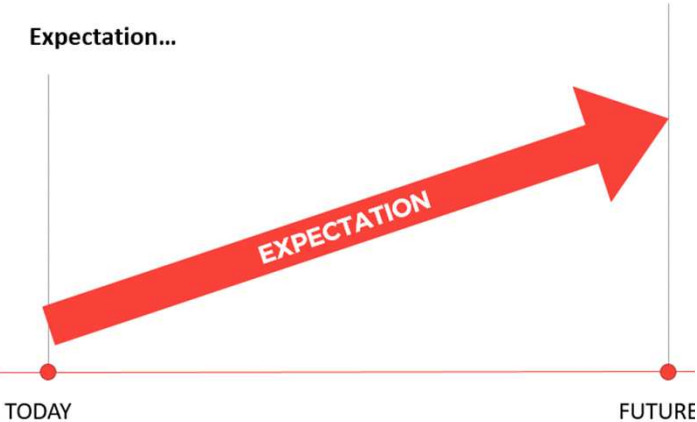
Future Mobility

People + places + activities



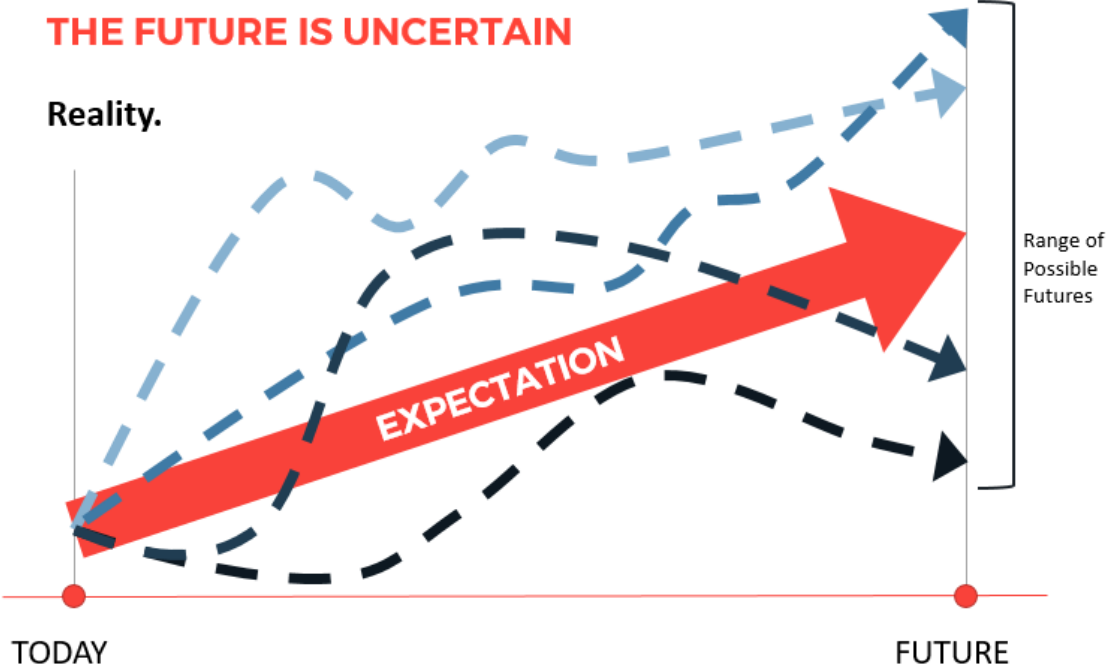
Energy + digital + access

Scenario planning... *enabling success*



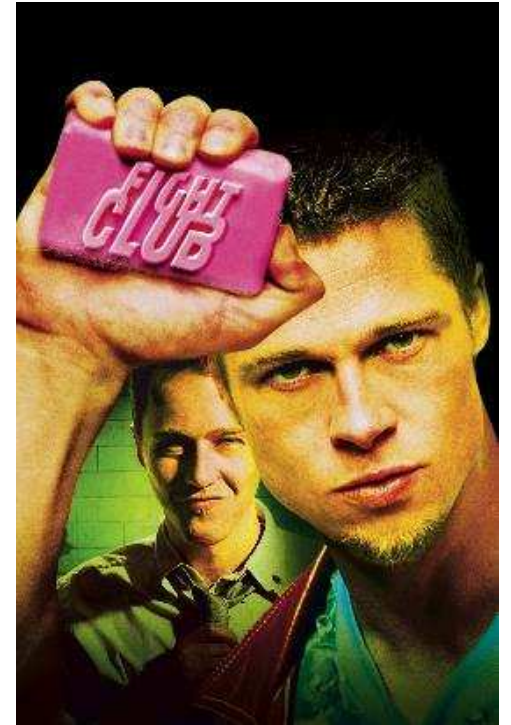
THE FUTURE IS UNCERTAIN

Reality.



**“If you don’t know
what you want, you
end up with a lot
you don’t”**

***Chuck Palahniuk,
novelist***



Thank you

*Sarah Fish,
WSP*

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THAMES ESTUARY

GROWTH DAY

PANEL: TRANSPORT

Sarah Fish

Associate director, WSP

Alistair Gale

Director of corporate affairs, Port
of London Authority

Liam McKay

Director of corporate affairs,
London City Airport

Kate Willard

Partnerships director, Stobart
Group

Berkeley
Designed for life


COUNTRYSIDE
Places People Love


GLENNY


E&A
estates&agency group

L&Q


LONDON
CITY
AIRPORT


**PORT OF
LONDON
AUTHORITY**


**Weston
Homes**

THAMES ESTUARY

GROWTH DAY

PANEL: SYNTHESIS

Patricia Brown
Director, Central

John Newbiggin OBE
Co-founder, Creative England

Robbie Owen
Head of infrastructure planning
and government affairs, Pinsent
Masons

Berkeley
Designed for life


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Homes**

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THANK YOU



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