

# HOUSING DEMAND ANALYSIS: BRENTFORD

KNIGHT FRANK RESIDENTIAL RESEARCH CONSULTANCY

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## 1. INTRODUCTION

This study aims to understand of the future housing needs within Brentford. Brentford is located in the north of the Borough of Hounslow and neighbours the Borough of Ealing. The borough of Hounslow is extremely diverse, both in its geography, demographic profile and housing markets. It stretches from Chiswick in the east, to Feltham in the south west.

Due to Brentford's location within Hounslow borough, its proximity to Ealing, and excellent transport links to Central London, some characteristics of the area, resident population and demographics are likely to be influenced by both the housing market in Hounslow and in neighbouring Ealing.

In order to understand housing needs within Brentford it is necessary to understand the current population and households and to assess both the current and forecast population and household numbers and structure within both the boroughs of Ealing and Hounslow. This study will also look to assess the current housing targets and projected housing supply for Brentford and Hounslow Borough, against future housing need within the borough.

### **Area Overview:**

Brentford is a town located within the London Borough of Hounslow, in the West of London. It is covered by the TW8 postcode sector. Brentford is situated close to Heathrow Airport, Central London and the M4 corridor, for these reasons it is an important location for business and has attracted a diverse mix of company headquarters. These companies include GlaxoSmithKline, Barratt Home, Sky, Sega Europe and Kraft Foods International (EU Headquarters). In 2016 Hounslow had 198,000 jobs, the eighth highest for Greater London Boroughs (Source: ONS). The main sectors of employment are Information & Communication, followed by Business Administration, and Transportation & Storage (based on 2014 figures from NOMIS).

Brentford remains a relatively affordable area of London, average property prices in Brentford were £534,443 in 2017. This compares with an average of £618,316 across Greater London, (Source: Land Registry Price Paid Data).

Several tube stations service the Brentford area, providing rapid transport opportunities to destinations around London and beyond. Northfields, Boston Manor, South Ealing and Gunnersbury tube stations offer connections to the Piccadilly, District and London Overground lines, providing easy access to the major transport hubs. Brentford railway station provides connections to Waterloo and along the West coast line.

Brentford Dock was initially established as a transport hub linking the River Thames with the Great Western Railway (GWR) network. The docks were redeveloped as residential accommodation in the 1970's. The waterway is still in use for leisure traffic as part of the Grand Union Canal.

The rejuvenation of Brentford Market has helped to cement Brentford's growing reputation of having a very special and friendly community. The Sunday market has been a huge success, helped by the refurbishment of the historic Market Place. Situated by the old Magistrate's Court, Market Place was recently granted funding from the Mayor's Outer London Fund to develop, expand and improve the area.

## 2. STUDY OF RESIDENT POPULATION

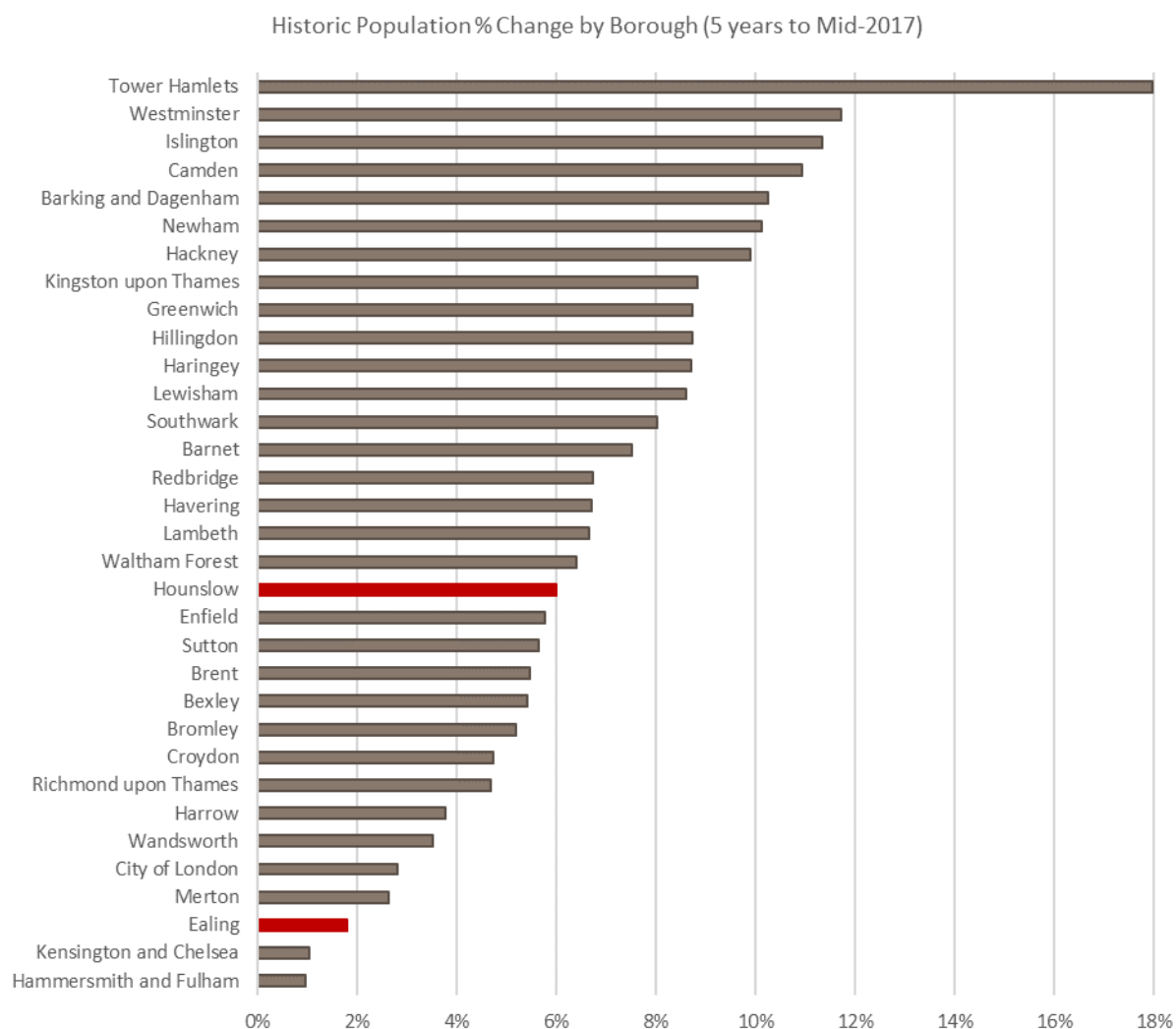
### 2.1. Historic Population growth for Hounslow and Ealing Boroughs

#### Total Population by Borough

		2012	2013	2014	2015	2016	2017	5yr % Change (to mid-2017)
1	Tower Hamlets	263,676	273,563	284,688	295,909	305,527	311,044	18.00%
2	Westminster	223,858	226,841	233,292	242,299	247,614	250,049	11.70%
3	Islington	211,400	216,024	221,383	228,045	233,218	235,370	11.30%
4	Camden	224,961	229,718	234,845	241,058	246,180	249,556	10.90%
5	Barking and Dagenham	190,949	194,741	198,683	202,368	206,849	210,513	10.20%
6	Newham	315,536	319,679	325,774	334,269	342,430	347,448	10.10%
7	Hackney	252,515	257,775	263,546	269,405	273,922	277,475	9.90%
8	Kingston upon Thames	163,939	166,826	169,991	173,558	176,140	178,419	8.80%
9	Haringey	259,810	264,284	268,439	273,762	279,349	282,397	8.70%
10	Hillingdon	282,391	287,443	293,325	298,370	303,106	307,040	8.70%
11	Greenwich	260,068	264,008	268,678	274,803	279,766	282,774	8.70%
12	Lewisham	282,143	286,767	292,520	297,912	302,454	306,380	8.60%
13	Southwark	294,174	299,109	303,182	309,545	313,867	317,735	8.00%
14	Barnet	364,071	369,203	375,030	379,806	386,198	391,446	7.50%
15	Havering	240,087	242,434	246,328	249,439	253,137	256,162	6.70%
16	Redbridge	284,743	288,398	293,181	296,919	299,375	303,887	6.70%
17	Lambeth	310,527	314,569	318,543	324,758	328,237	331,157	6.60%
18	Waltham Forest	263,221	266,452	268,675	271,825	276,498	280,050	6.40%
19	Hounslow	259,459	262,814	265,975	269,177	271,546	274,970	6.00%
20	Enfield	317,363	320,600	324,650	328,509	331,471	335,647	5.80%
21	Sutton	194,022	196,306	198,526	200,537	202,612	204,933	5.60%
22	Brent	315,499	318,103	321,601	324,851	329,093	332,750	5.50%
23	Bexley	234,499	236,915	240,093	242,370	244,988	247,179	5.40%
24	Bromley	314,592	318,455	321,834	325,413	327,445	330,909	5.20%
25	Richmond upon Thames	189,145	191,365	193,585	194,730	195,846	197,988	4.70%
26	Croydon	368,886	372,752	376,040	379,031	382,304	386,346	4.70%
27	Harrow	242,941	243,937	246,575	247,694	249,316	252,052	3.80%
28	Wandsworth	308,902	311,106	312,735	315,134	316,686	319,731	3.50%
29	City of London	7,204	6,848	6,872	7,160	7,401	7,405	2.80%
30	Merton	202,908	203,906	204,198	205,248	205,712	208,225	2.60%
31	Ealing	341,022	342,845	342,469	343,410	343,547	347,126	1.80%
32	Kensington and Chelsea	156,331	155,995	156,591	158,112	157,127	157,954	1.00%
33	Hammersmith and Fulham	180,195	179,030	178,710	179,754	179,998	181,889	0.90%
	Greater London	8,321,037	8,428,811	8,550,557	8,685,180	8,798,959	8,904,006	7.0%

Source: Knight Frank Research, ONS

## Population % Change by Borough



Source: Knight Frank Research, ONS

## Sources of Population Change in Ealing and Hounslow

		Ealing	Hounslow	Greater London
2012	births	5,727	4,671	134,037
	deaths	1,900	1,422	47,572
	natural change	3,827	3,249	86,465
	net migration	-2,470	876	17,095
	net population change	1,357	4,125	103,560
2013	births	5,687	4,512	131,011
	deaths	1,873	1,436	48,078
	natural change	3,814	3,076	82,933
	net migration	-1,991	279	24,841
	net population change	1,823	3,355	107,774
2014	births	5,462	4,344	127,807
	deaths	1,754	1,354	45,449
	natural change	3,708	2,990	82,358
	net migration	-4,084	171	39,388
	net population change	-376	3,161	121,746
2015	births	5,389	4,339	128,520
	deaths	1,985	1,468	50,151
	natural change	3,404	2,871	78,369
	net migration	-2,463	331	56,254
	net population change	941	3,202	134,623
2016	births	5,151	4,400	129,847
	deaths	1,858	1,428	48,513
	natural change	3,293	2,972	81,334
	net migration	-3,156	-603	32,445
	net population change	137	2,369	113,779
2017	births	5,031	4,323	129,583
	deaths	1,887	1,440	49,307
	natural change	3,144	2,883	80,277
	net migration	435	541	24,769
	net population change	3,579	3,424	105,046
5-year Population Growth	natural change	17,363	14,792	405,271
	net migration	-11,259	719	177,697
	net population change	6,104	15,511	582,968

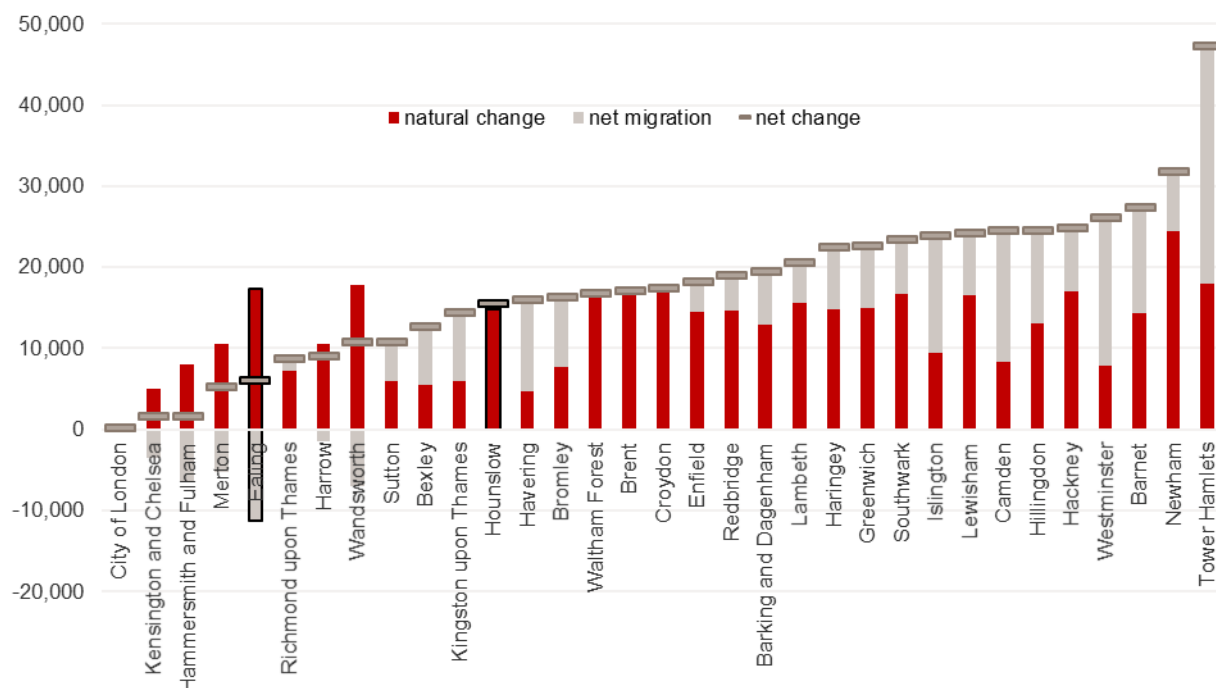
Source: Knight Frank Research, ONS

## Historic Population Change by Borough (2013-2017)

	5 year Total Population Growth			5 year % Population Growth		
	natural change	net migration	net change	natural change	net migration	net change
City of London	137	64	201	1.9%	0.9%	2.8%
Kensington and Chelsea	5,077	-3,454	1,623	3.2%	-2.2%	1.0%
Hammersmith and Fulham	7,989	-6,295	1,694	4.4%	-3.5%	0.9%
Merton	10,598	-5,281	5,317	5.2%	-2.6%	2.6%
<b>Ealing</b>	<b>17,363</b>	<b>-11,259</b>	<b>6,104</b>	<b>5.1%</b>	<b>-3.3%</b>	<b>1.8%</b>
Richmond upon Thames	7,241	1,602	8,843	3.8%	0.8%	4.7%
Harrow	10,525	-1,413	9,112	4.3%	-0.6%	3.8%
Wandsworth	17,871	-7,042	10,829	5.8%	-2.3%	3.5%
Sutton	5,992	4,918	10,910	3.1%	2.5%	5.6%
Bexley	5,503	7,176	12,679	2.3%	3.1%	5.4%
Kingston upon Thames	5,948	8,533	14,481	3.6%	5.2%	8.8%
<b>Hounslow</b>	<b>14,792</b>	<b>719</b>	<b>15,511</b>	<b>5.7%</b>	<b>0.3%</b>	<b>6.0%</b>
Havering	4,678	11,397	16,075	1.9%	4.7%	6.7%
Bromley	7,707	8,610	16,317	2.4%	2.7%	5.2%
Waltham Forest	16,320	509	16,829	6.2%	0.2%	6.4%
Brent	17,479	-228	17,251	5.5%	-0.1%	5.5%
Croydon	16,877	583	17,460	4.6%	0.2%	4.7%
Enfield	14,541	3,743	18,284	4.6%	1.2%	5.8%
Redbridge	14,657	4,486	19,143	5.1%	1.6%	6.7%
Barking and Dagenham	12,965	6,599	19,564	6.8%	3.5%	10.2%
Lambeth	15,628	5,002	20,630	5.0%	1.6%	6.6%
Haringey	14,844	7,743	22,587	5.7%	3.0%	8.7%
Greenwich	15,021	7,684	22,705	5.8%	3.0%	8.7%
Southwark	16,722	6,840	23,562	5.7%	2.3%	8.0%
Islington	9,397	14,572	23,969	4.4%	6.9%	11.3%
Lewisham	16,543	7,694	24,237	5.9%	2.7%	8.6%
Camden	8,251	16,344	24,595	3.7%	7.3%	10.9%
Hillingdon	13,001	11,648	24,649	4.6%	4.1%	8.7%
Hackney	16,957	8,004	24,961	6.7%	3.2%	9.9%
Westminster	7,847	18,344	26,191	3.5%	8.2%	11.7%
Barnet	14,400	12,975	27,375	4.0%	3.6%	7.5%
Newham	24,505	7,406	31,911	7.8%	2.3%	10.1%
Tower Hamlets	17,895	29,474	47,369	6.8%	11.2%	18.0%
Greater London	<b>405,271</b>	<b>177,697</b>	<b>582,968</b>	<b>4.9%</b>	<b>2.1%</b>	<b>7.0%</b>

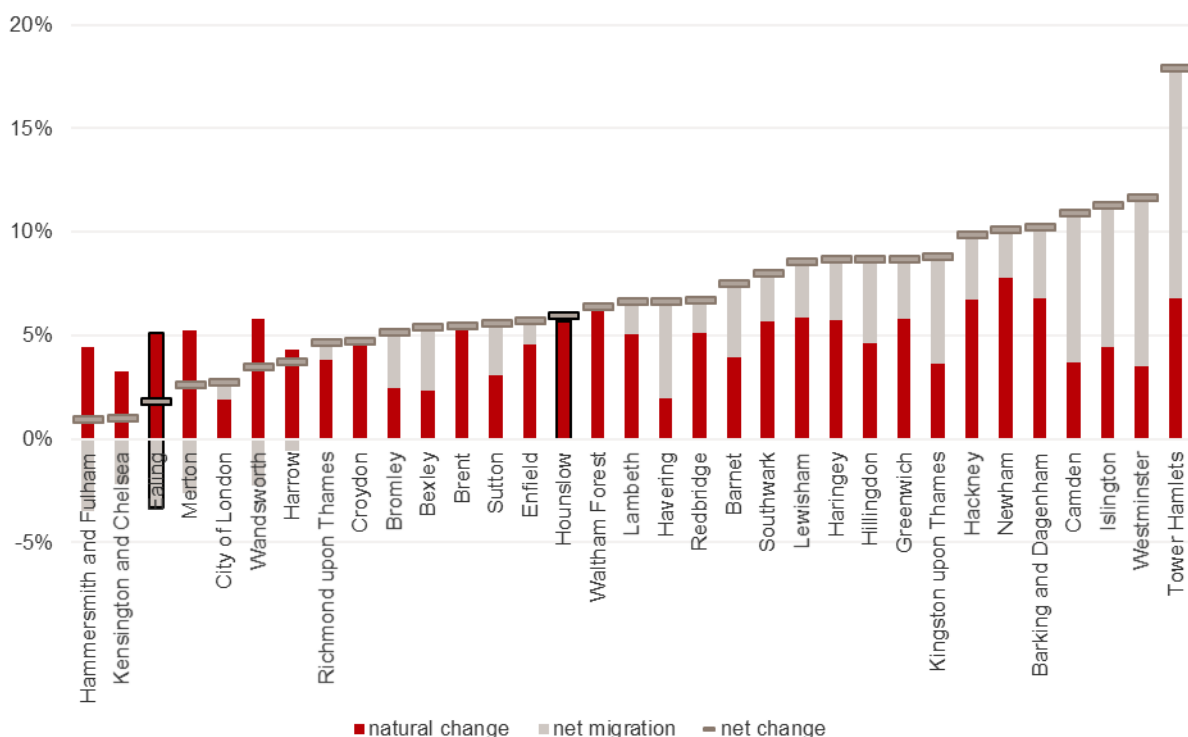
Source: Knight Frank Research, ONS

Historic 5-year total Population Change by component (5 years to mid-2017)



Source: Knight Frank Research, ONS

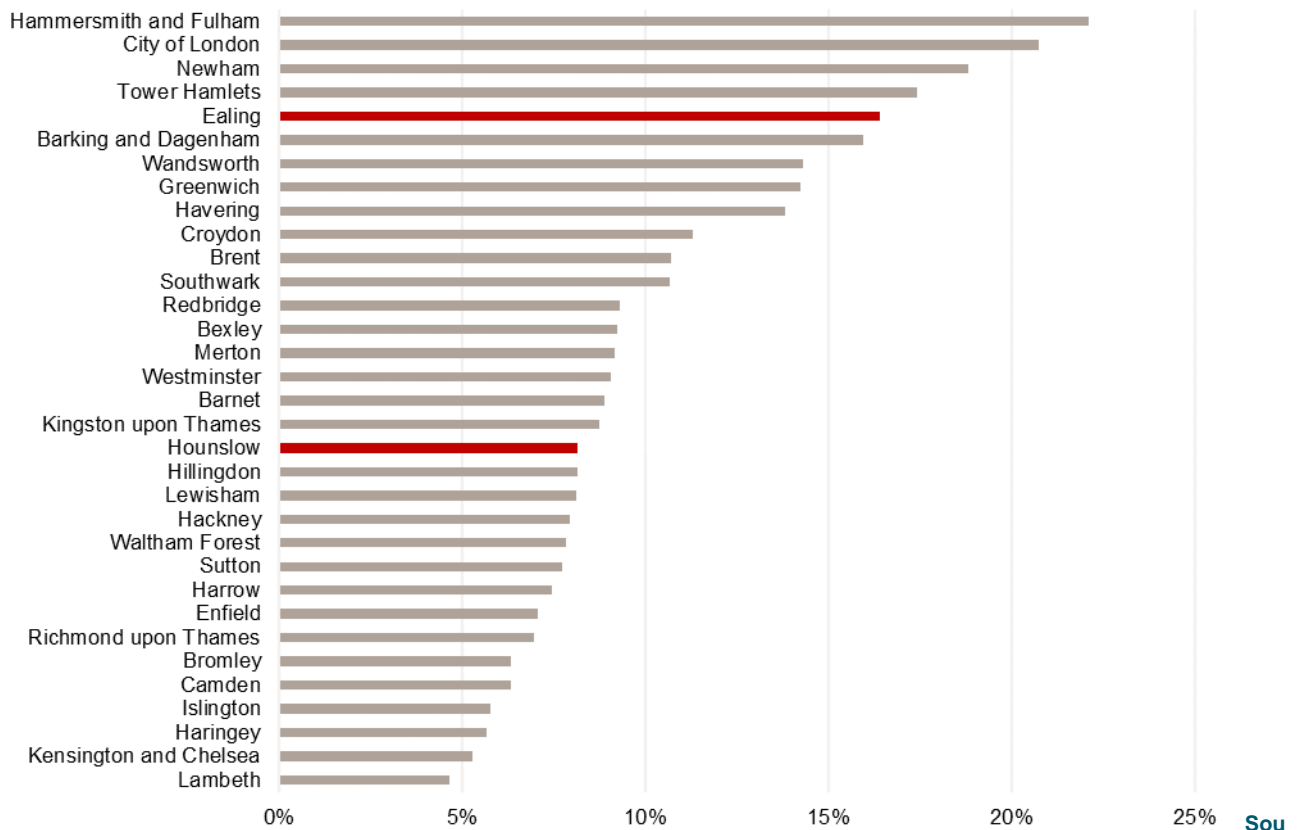
Historic 5-year % Population Change by component (5 years to mid-2017)



Source: Knight Frank Research, ONS



## Forecast Population % Change by Borough (10 years to Mid-2027)



Source: Knight Frank Research, ONS

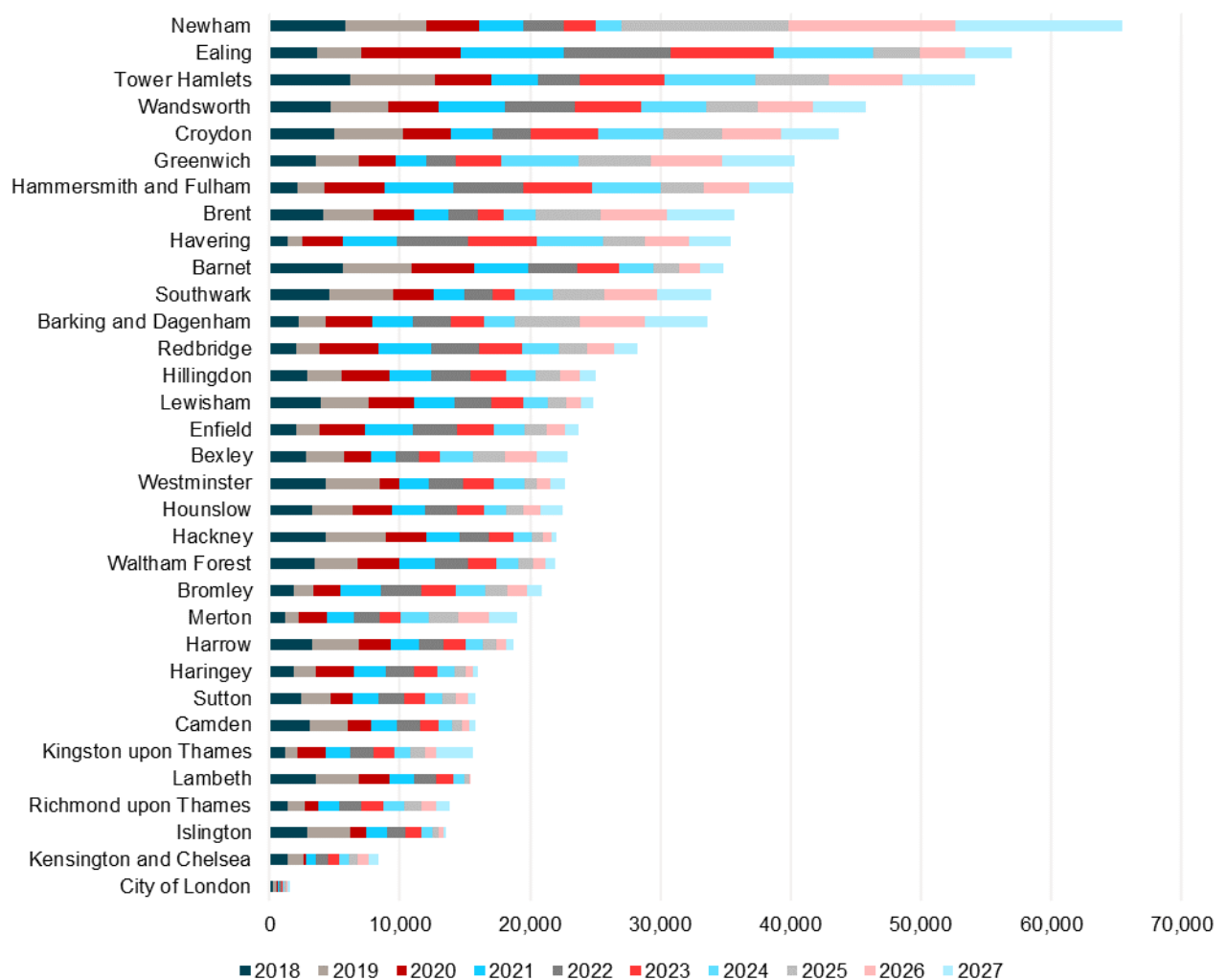
## Net Population change by Borough

	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	10yr Growth
City of London	4	276	272	93	118	125	120	117	136	140	138	1,535
Kensington and Chelsea	827	1,347	1,230	263	758	894	809	765	710	792	765	8,333
Islington	2,151	2,897	3,323	1,238	1,545	1,467	1,170	833	511	371	193	13,548
Richmond upon Thames	2,142	1,431	1,284	1,010	1,599	1,740	1,657	1,612	1,304	1,141	1,023	13,801
Lambeth	2,920	3,567	3,304	2,296	1,925	1,732	1,303	816	347	167	-30	15,427
Kingston upon Thames	2,280	1,161	1,017	2,130	1,932	1,774	1,538	1,303	1,054	914	2,785	15,608
Camden	3,376	3,081	2,889	1,858	1,960	1,738	1,412	1,055	750	614	421	15,778
Sutton	2,321	2,445	2,288	1,631	2,042	1,888	1,638	1,353	1,057	859	650	15,851
Haringey	3,047	1,891	1,661	2,964	2,416	2,173	1,760	1,309	838	610	350	15,972
Harrow	2,736	3,317	3,492	2,488	2,136	1,965	1,671	1,328	974	816	561	18,748
Merton	2,513	1,196	1,031	2,206	2,082	1,922	1,636	2,121	2,296	2,333	2,232	19,055
Bromley	3,465	1,824	1,559	2,103	3,071	3,082	2,668	2,238	1,753	1,486	1,146	20,930
Waltham Forest	3,552	3,475	3,252	3,247	2,765	2,523	2,128	1,666	1,179	957	696	21,888
Hackney	3,554	4,264	4,686	3,063	2,535	2,288	1,865	1,393	902	654	363	22,013
Hounslow	3,424	3,294	3,075	3,018	2,589	2,411	2,102	1,707	1,292	1,331	1,629	22,448
Westminster	2,435	4,326	4,136	1,470	2,335	2,558	2,399	2,319	948	1,107	1,043	22,641
Bexley	2,190	2,820	2,887	2,085	1,875	1,762	1,625	2,566	2,451	2,403	2,351	22,825
Enfield	4,176	2,050	1,782	3,513	3,642	3,359	2,884	2,330	1,740	1,393	979	23,672
Lewisham	3,926	3,944	3,703	3,438	3,109	2,847	2,409	1,900	1,407	1,181	887	24,825
Hillingdon	3,934	2,886	2,640	3,686	3,214	3,025	2,690	2,273	1,846	1,570	1,204	25,034
Redbridge	4,511	2,023	1,781	4,573	4,024	3,730	3,284	2,768	2,210	2,024	1,802	28,219
Barking and Dagenham	3,664	2,260	2,085	3,509	3,128	2,912	2,581	2,349	4,980	4,984	4,788	33,576
Southwark	3,868	4,567	4,969	3,019	2,389	2,146	1,728	2,890	3,959	4,111	4,073	33,851
Barnet	5,248	5,603	5,314	4,786	4,126	3,766	3,250	2,633	1,971	1,614	1,759	34,822
Havering	3,026	1,349	1,144	3,174	4,101	5,437	5,281	5,080	3,242	3,349	3,236	35,393
Brent	3,657	4,109	3,851	3,143	2,585	2,346	1,931	2,416	5,040	5,115	5,111	35,647
Hammersmith and Fulham	1,891	2,161	2,025	4,646	5,260	5,425	5,283	5,206	3,332	3,459	3,397	40,194

	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	10yr Growth
Greenwich	3,008	3,549	3,328	2,816	2,371	2,202	3,475	5,987	5,526	5,533	5,502	40,289
Croydon	4,042	4,950	5,252	3,724	3,189	2,937	5,181	5,002	4,508	4,522	4,397	43,662
Wandsworth	3,045	4,669	4,428	3,904	5,052	5,364	5,125	5,007	3,962	4,182	4,089	45,782
Tower Hamlets	5,518	6,159	6,493	4,347	3,577	3,214	6,524	7,005	5,582	5,653	5,580	54,134
Ealing	3,578	3,659	3,399	7,650	7,852	8,230	7,902	7,616	3,576	3,542	3,567	56,993
Newham	5,018	5,798	6,225	4,082	3,391	3,060	2,511	1,910	12,810	12,822	12,840	65,449

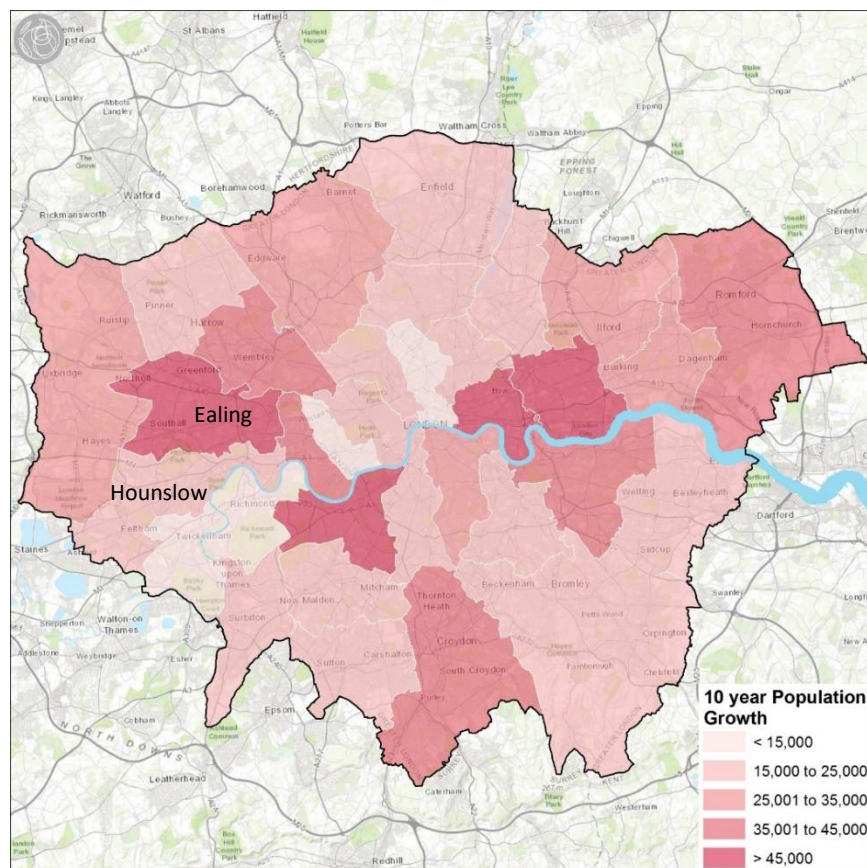
Source: Knight Frank Research, ONS

### Forecast Net Population Change by Borough (10 years to Mid-2027)



Source: Knight Frank Research, ONS

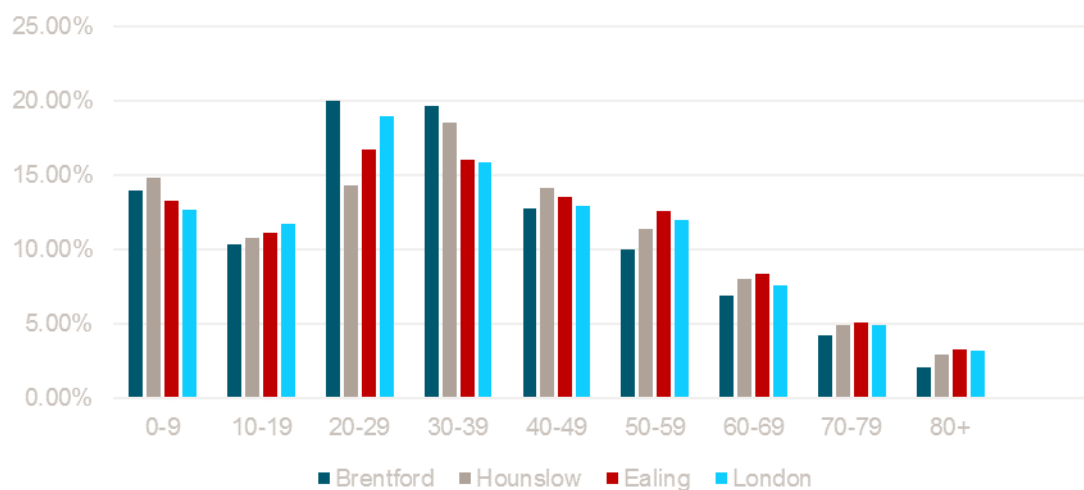
## Ten-year net Population Change by Borough (to mid-2027)



Source: Knight Frank Research, ONS

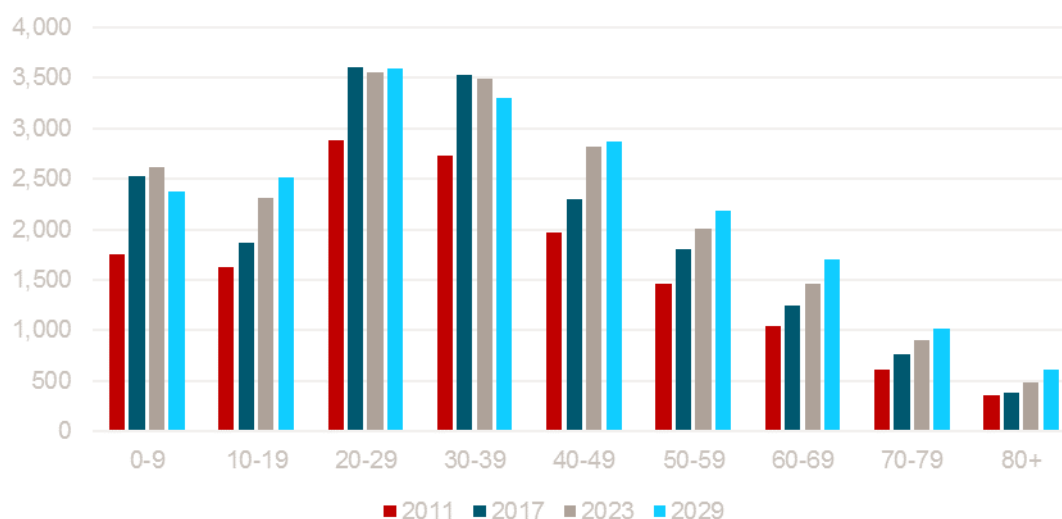
## 2.2. Demographics of the Populations of Hounslow and Ealing Boroughs

Percentage of Population by age band – Brentford, Hounslow, Ealing and Greater London (2017)



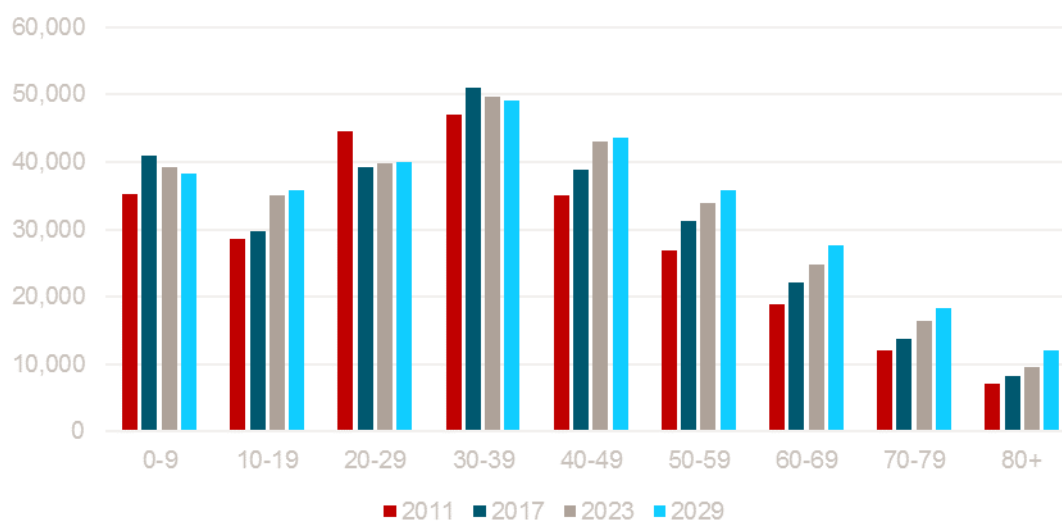
Source: Knight Frank Research, GLA

### Brentford – Changing demographic profile



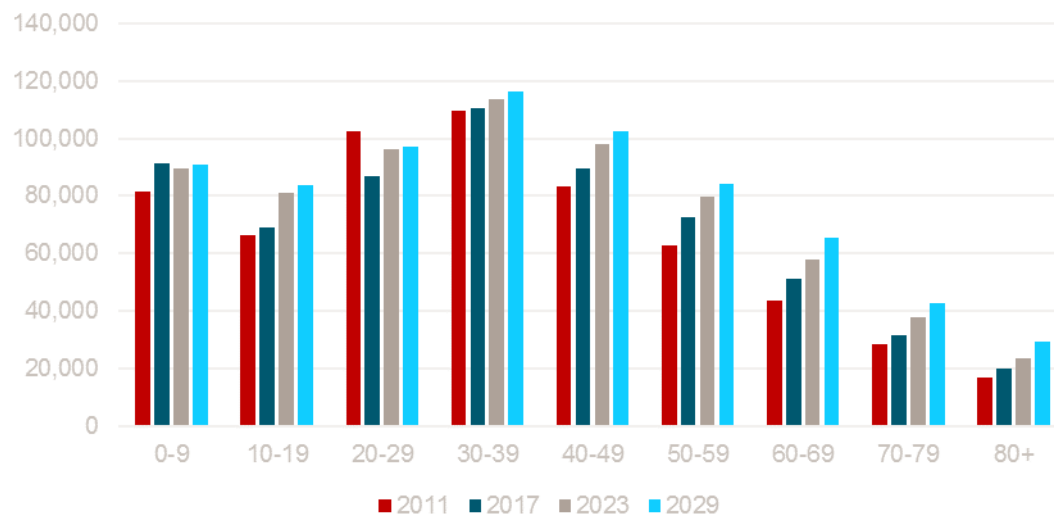
Source: Knight Frank Research, GLA

### Hounslow – Changing demographic profile



Source: Knight Frank Research, GLA

### Ealing – Changing demographic profile



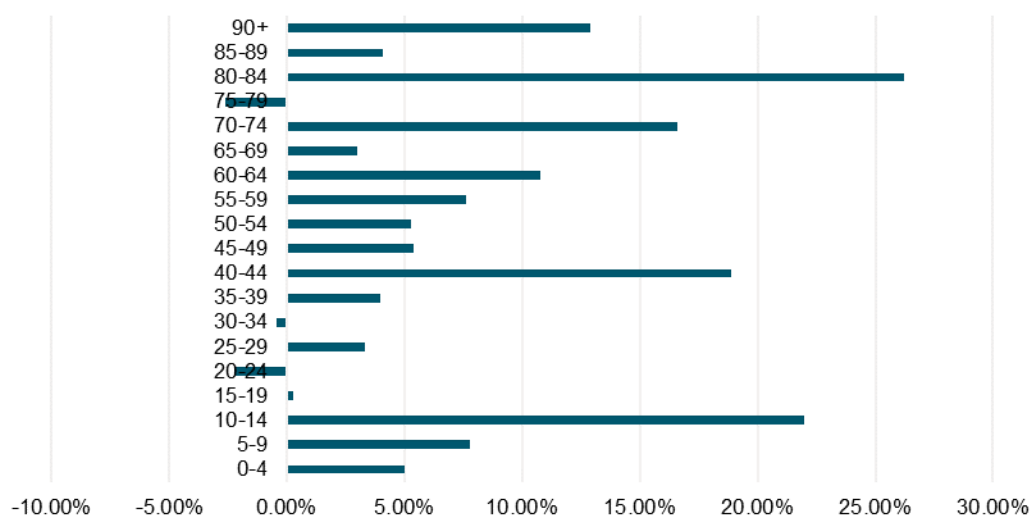
Source: Knight Frank Research, GLA

### Brentford Ward – Historic Population by age band

Age Band	2011	2012	2013	2014	2015	2016	2017
0-4	1,060	1,136	1,147	1,200	1,300	1,360	1,371
5-9	692	741	794	883	984	1,062	1,149
10-14	693	652	636	634	678	687	740
15-19	925	1,002	1,070	1,132	1,234	1,176	1,121
20-24	1,327	1,391	1,428	1,630	1,929	1,930	1,983
25-29	1,558	1,409	1,365	1,409	1,603	1,602	1,623
30-34	1,546	1,567	1,585	1,615	1,777	1,781	1,780
35-39	1,184	1,227	1,317	1,451	1,612	1,684	1,755
40-44	993	1,002	992	1,032	1,126	1,178	1,228
45-49	971	955	986	1,000	1,036	1,037	1,067
50-54	802	812	814	844	891	950	946
55-59	665	701	717	763	807	837	857
60-64	579	572	590	581	608	636	674
65-69	461	477	503	545	563	571	571
70-74	370	390	375	362	381	402	421
75-79	241	247	281	311	311	321	340
80-84	188	188	173	172	188	188	192
85-89	114	115	117	117	118	118	120
90+	59	63	62	66	65	67	70
<b>Total</b>	<b>14,426</b>	<b>14,646</b>	<b>14,952</b>	<b>15,745</b>	<b>17,209</b>	<b>17,585</b>	<b>18,007</b>

Source: Knight Frank Research, GLA

### Brentford – Population Change 10 year forecast



Source: Knight Frank Research, GLA

### Brentford Ward – Forecast Population by age band (2016-based Central Trend)

Age Band	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	10 year % change
0-4	1,408	1,433	1,441	1,423	1,400	1,374	1,347	1,323	1,302	1,285	-6.2%
5-9	1,186	1,220	1,240	1,263	1,249	1,249	1,236	1,214	1,182	1,154	0.4%
10-14	786	847	902	954	1,017	1,039	1,056	1,057	1,062	1,042	40.7%
15-19	1,114	1,100	1,124	1,151	1,209	1,269	1,332	1,379	1,420	1,468	31.0%
20-24	1,996	1,975	1,941	1,910	1,887	1,892	1,900	1,912	1,935	1,974	-0.5%
25-29	1,630	1,660	1,675	1,678	1,680	1,668	1,647	1,615	1,584	1,556	-4.1%
30-34	1,786	1,788	1,771	1,758	1,745	1,721	1,710	1,690	1,672	1,665	-6.4%
35-39	1,795	1,811	1,827	1,817	1,793	1,775	1,752	1,719	1,699	1,682	-4.1%
40-44	1,309	1,394	1,462	1,514	1,554	1,567	1,556	1,540	1,516	1,487	21.1%
45-49	1,069	1,093	1,126	1,159	1,192	1,248	1,307	1,352	1,387	1,415	32.5%
50-54	986	994	996	992	1,013	1,011	1,027	1,047	1,066	1,085	14.8%
55-59	869	891	922	969	967	1,002	1,008	1,007	1,001	1,018	18.7%
60-64	688	721	747	767	788	798	818	844	882	881	30.7%
65-69	587	577	588	608	641	657	688	714	735	756	32.6%
70-74	447	482	492	497	496	507	499	508	524	550	30.6%
75-79	328	317	332	349	367	390	419	427	432	429	26.4%
80-84	220	242	240	246	261	252	244	256	270	286	49.1%
85-89	112	113	126	127	130	149	163	163	166	175	45.8%
90+	74	77	79	82	85	84	87	96	99	104	48.2%
Total	18,388	18,734	19,029	19,261	19,474	19,650	19,796	19,863	19,931	20,012	11.1%

Source: Knight Frank Research, GLA

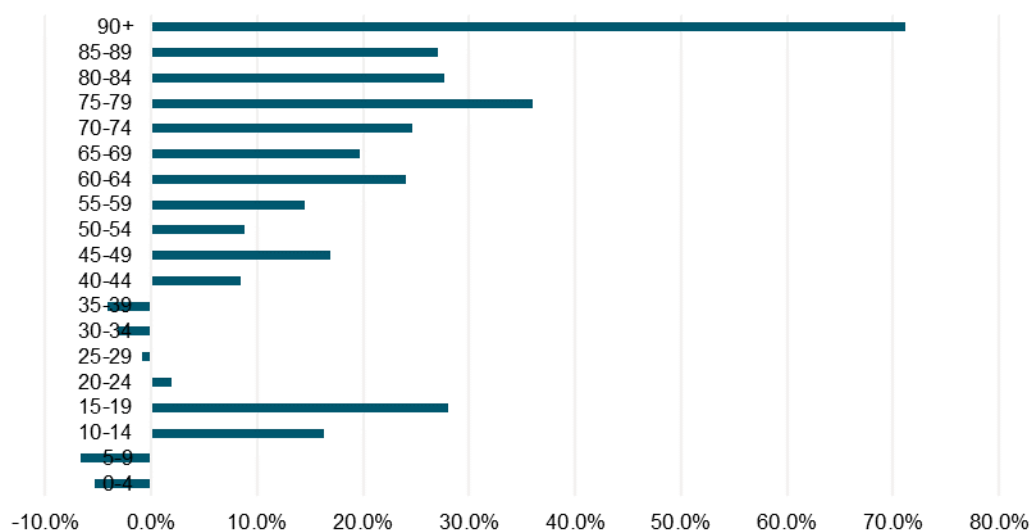
### Hounslow – Historic Population by age band

Age Band	2011	2012	2013	2014	2015	2016	2017
0-4	20,249	21,232	21,468	21,666	21,662	21,486	20,967
5-9	15,064	15,912	16,966	17,758	18,531	19,216	19,902
10-14	13,922	13,740	13,708	13,760	14,186	14,795	15,503
15-19	14,684	14,570	14,550	14,591	14,508	14,412	14,133
20-24	18,396	17,909	16,978	16,723	16,528	16,096	16,725
25-29	26,214	25,435	24,971	24,224	23,382	22,751	22,553
30-34	25,783	26,827	27,231	27,052	26,761	26,117	25,818
35-39	21,297	21,958	22,766	23,533	24,161	24,696	25,249
40-44	18,159	18,608	18,978	19,484	20,148	20,541	20,814
45-49	16,818	17,110	17,401	17,471	17,669	17,760	18,102
50-54	14,553	14,906	15,227	15,665	16,198	16,730	16,886
55-59	12,276	12,524	12,892	13,365	13,682	14,098	14,424
60-64	10,904	10,915	11,018	11,135	11,345	11,682	11,951
65-69	8,033	8,549	9,007	9,421	9,834	10,115	10,101
70-74	6,619	6,662	6,757	6,843	7,005	7,333	7,818
75-79	5,311	5,445	5,552	5,761	5,834	5,742	5,826
80-84	3,726	3,827	3,968	4,063	4,131	4,196	4,275
85-89	2,217	2,188	2,170	2,193	2,309	2,434	2,538
90+	1,109	1,142	1,206	1,267	1,303	1,346	1,388
<b>Total</b>	<b>255,334</b>	<b>259,459</b>	<b>262,814</b>	<b>265,975</b>	<b>269,177</b>	<b>271,546</b>	<b>274,973</b>

Source: Knight Frank Research, GLA



## Hounslow – Population Change 10-year forecast



Source: Knight Frank Research, GLA

## Hounslow – Forecast Population by age band

	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	10 year % change
0-4	20,683	20,571	20,507	20,392	20,322	20,248	20,156	20,038	19,930	19,859	-5.3%
5-9	20,101	20,189	20,009	19,774	19,313	19,034	18,902	18,783	18,648	18,571	-6.7%
10-14	16,300	16,966	17,631	18,150	18,719	18,862	18,901	18,695	18,450	18,028	16.3%
15-19	14,116	14,098	14,401	14,869	15,473	16,160	16,694	17,222	17,641	18,094	28.0%
20-24	17,061	17,204	17,172	17,008	16,731	16,587	16,419	16,440	16,651	17,054	2.0%
25-29	22,461	22,675	22,871	22,985	23,217	23,257	23,148	22,914	22,634	22,360	-0.9%
30-34	25,688	25,484	25,307	25,242	25,142	25,021	25,045	24,971	24,901	24,990	-3.2%
35-39	25,370	25,403	25,318	25,073	24,825	24,712	24,555	24,348	24,270	24,219	-4.1%
40-44	21,313	21,751	22,171	22,674	23,078	23,174	23,140	22,988	22,768	22,562	8.4%
45-49	18,329	18,676	19,050	19,308	19,469	19,797	20,127	20,437	20,823	21,154	16.9%
50-54	17,161	17,168	17,199	17,250	17,502	17,649	17,887	18,122	18,274	18,373	8.8%
55-59	14,736	15,103	15,575	15,945	16,086	16,306	16,295	16,291	16,323	16,517	14.5%
60-64	12,202	12,509	12,779	13,079	13,379	13,658	13,980	14,374	14,689	14,818	24.0%
65-69	10,157	10,252	10,371	10,604	10,839	11,058	11,321	11,553	11,820	12,093	19.7%
70-74	8,225	8,569	8,906	9,135	9,113	9,157	9,235	9,336	9,538	9,748	24.7%
75-79	5,877	5,945	6,102	6,365	6,803	7,166	7,460	7,742	7,935	7,922	36.0%
80-84	4,404	4,546	4,570	4,488	4,578	4,641	4,720	4,861	5,077	5,457	27.6%
85-89	2,626	2,707	2,786	2,860	2,933	3,044	3,156	3,189	3,147	3,224	27.0%
90+	1,458	1,527	1,636	1,743	1,834	1,933	2,029	2,150	2,268	2,376	71.2%
Total	278,268	281,343	284,361	286,944	289,356	291,464	293,170	294,454	295,787	297,419	8.2%

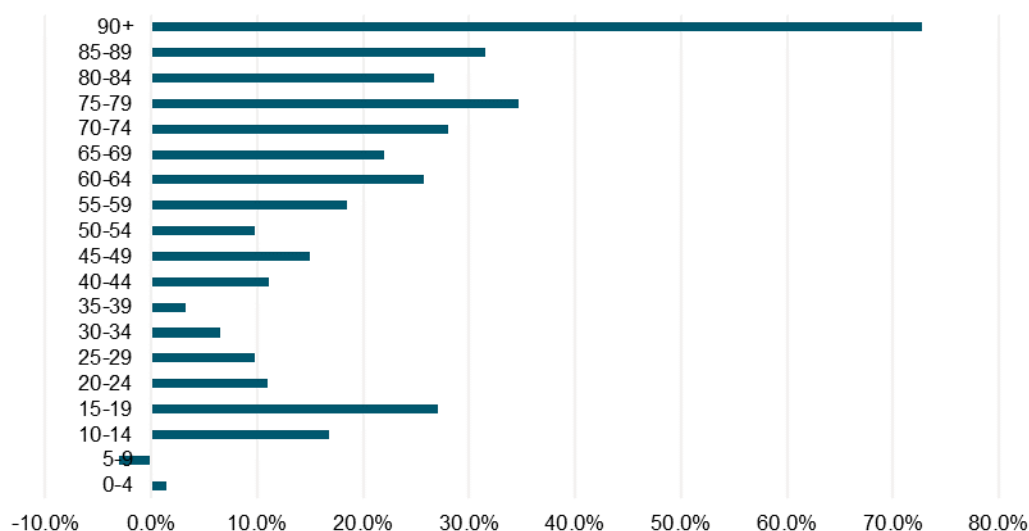
Source: Knight Frank Research, GLA

### Ealing – Historic Population by age band

Age Band	2011	2012	2013	2014	2015	2016	2017
0-4	46,145	47,745	48,101	48,319	48,252	47,713	46,445
5-9	35,572	37,230	39,381	40,997	42,424	43,587	44,794
10-14	32,952	32,739	32,816	32,976	33,699	34,773	36,077
15-19	33,530	33,210	33,284	33,180	33,290	32,980	32,907
20-24	42,540	40,726	38,428	36,960	35,843	34,955	36,497
25-29	60,113	58,291	56,840	54,610	52,799	50,680	50,453
30-34	59,604	60,712	61,021	59,467	58,140	56,315	55,835
35-39	49,793	50,615	51,577	52,653	53,531	54,107	54,679
40-44	43,655	44,192	44,848	45,535	46,166	46,737	47,045
45-49	39,834	40,396	41,126	41,377	41,810	42,184	42,701
50-54	33,664	34,640	35,415	36,535	37,719	38,745	39,220
55-59	29,002	29,459	30,080	30,750	31,501	32,302	33,161
60-64	25,125	25,265	25,621	26,017	26,594	27,388	27,862
65-69	18,593	19,755	20,728	21,555	22,499	23,108	23,183
70-74	15,589	15,599	15,743	15,796	16,022	16,710	17,772
75-79	12,624	12,886	13,207	13,640	13,761	13,575	13,710
80-84	8,651	8,953	9,211	9,579	9,809	10,079	10,240
85-89	5,253	5,199	5,213	5,307	5,468	5,729	6,029
90+	2,761	2,870	3,020	3,192	3,261	3,427	3,492
<b>Total</b>	<b>595,000</b>	<b>600,482</b>	<b>605,660</b>	<b>608,445</b>	<b>612,588</b>	<b>615,094</b>	<b>622,102</b>

Source: Knight Frank Research, GLA

## Ealing – Population Change 10-year forecast



Source: Knight Frank Research, GLA

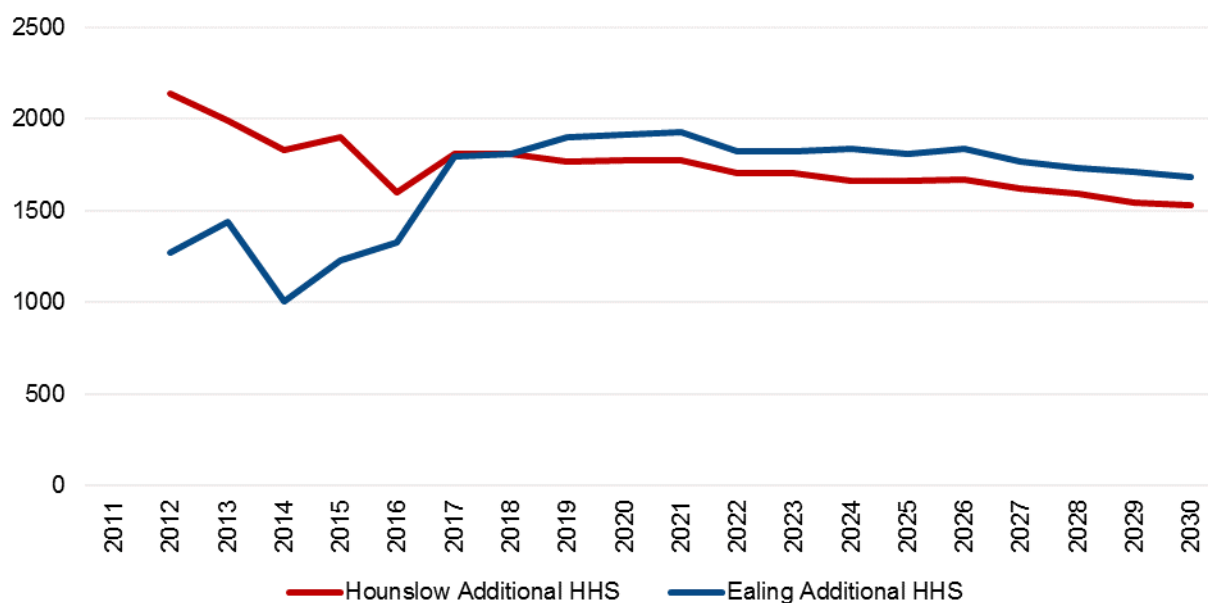
## Ealing – Forecast Population by age band

	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	10 year % change
<b>0-4</b>	45,540	45,109	45,121	45,304	45,756	46,245	46,732	46,926	47,032	47,108	<b>1.4%</b>
<b>5-9</b>	45,114	45,287	45,130	44,776	43,989	43,503	43,447	43,327	43,304	43,462	<b>-3.0%</b>
<b>10-14</b>	37,778	39,130	40,508	41,663	42,916	43,357	43,665	43,412	42,975	42,150	<b>16.8%</b>
<b>15-19</b>	32,994	32,968	33,625	34,636	35,960	37,620	38,890	39,962	40,870	41,810	<b>27.1%</b>
<b>20-24</b>	37,553	38,008	39,021	39,483	39,715	39,874	39,870	39,555	39,767	40,496	<b>11.0%</b>
<b>25-29</b>	50,438	51,073	52,458	53,856	55,344	56,410	57,017	56,672	56,079	55,411	<b>9.8%</b>
<b>30-34</b>	55,729	55,576	56,038	56,629	57,432	58,114	59,069	59,142	59,203	59,456	<b>6.5%</b>
<b>35-39</b>	54,986	54,582	54,719	54,876	55,125	55,671	56,214	56,195	56,294	56,491	<b>3.3%</b>
<b>40-44</b>	47,499	48,272	49,452	50,650	51,622	52,390	52,558	52,477	52,366	52,286	<b>11.1%</b>
<b>45-49</b>	42,979	43,455	43,944	44,516	44,949	45,533	46,460	47,403	48,340	49,076	<b>14.9%</b>
<b>50-54</b>	39,831	40,056	40,356	40,688	41,272	41,655	42,202	42,497	42,825	43,050	<b>9.8%</b>
<b>55-59</b>	33,960	34,856	35,980	36,925	37,492	38,137	38,450	38,635	38,858	39,271	<b>18.4%</b>
<b>60-64</b>	28,299	28,880	29,499	30,177	31,057	31,877	32,788	33,749	34,551	35,017	<b>25.7%</b>
<b>65-69</b>	23,452	23,784	24,218	24,834	25,323	25,782	26,368	26,919	27,523	28,289	<b>22.0%</b>
<b>70-74</b>	18,667	19,414	20,224	20,746	20,833	21,096	21,420	21,791	22,328	22,758	<b>28.1%</b>
<b>75-79</b>	13,756	13,878	14,113	14,721	15,727	16,573	17,267	17,959	18,401	18,468	<b>34.7%</b>
<b>80-84</b>	10,615	10,922	11,018	10,875	11,048	11,162	11,345	11,574	12,093	12,973	<b>26.7%</b>
<b>85-89</b>	6,222	6,478	6,735	6,981	7,158	7,479	7,750	7,855	7,782	7,933	<b>31.6%</b>
<b>90+</b>	3,644	3,795	4,035	4,294	4,554	4,803	5,091	5,415	5,742	6,030	<b>72.7%</b>
<b>Total</b>	<b>629,056</b>	<b>635,523</b>	<b>646,194</b>	<b>656,630</b>	<b>667,272</b>	<b>677,281</b>	<b>686,603</b>	<b>691,465</b>	<b>696,333</b>	<b>701,535</b>	<b>12.8%</b>

Source: Knight Frank Research, GLA

### 3. Analysis of households

**Additional Households per annum in Ealing and Hounslow**



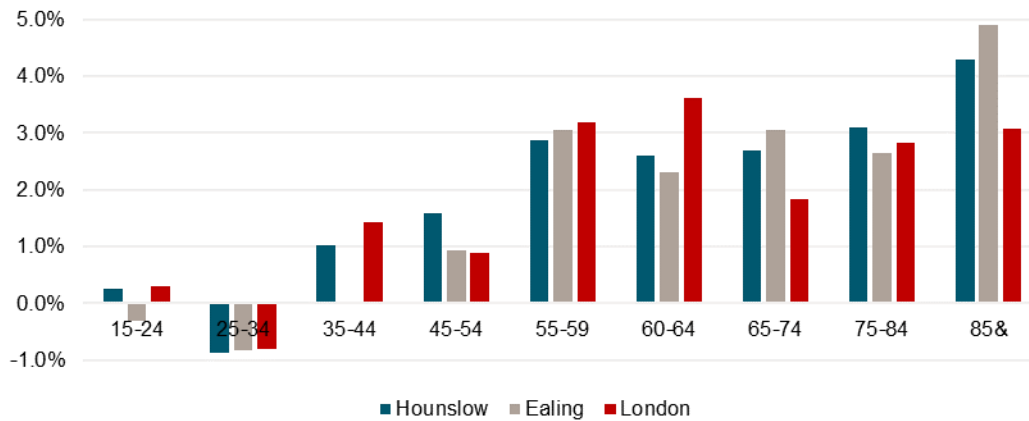
Source: Knight Frank Research, GLA

**Household Projections for Hounslow, Ealing and London (2016-base central trend)**

	HOUNSLOW			EALING			LONDON		
	Total HHS	Additional HHS	Annual % Change	Total HHS	Additional HHS	Annual % Change	Total HHS	Additional HHS	Annual % Change
2011	95,252			124,397			3,278,449		
2012	97,389	2,137	2.2%	125,665	1,268	1.0%	3,329,736	51,286	1.6%
2013	99,382	1,993	2.0%	127,104	1,439	1.1%	3,387,955	58,219	1.7%
2014	101,212	1,830	1.8%	128,108	1,004	0.8%	3,451,429	63,475	1.9%
2015	103,109	1,897	1.9%	129,335	1,227	1.0%	3,519,001	67,571	2.0%
2016	104,711	1,602	1.6%	130,659	1,324	1.0%	3,581,640	32,139	1.8%
2017	106,519	1,808	1.7%	132,452	1,793	1.4%	3,634,149	23,511	1.5%
2018	108,331	1,812	1.7%	134,260	1,808	1.4%	3,687,485	23,388	1.5%
2019	110,099	1,768	1.6%	136,159	1,898	1.4%	3,741,264	23,453	1.5%
2020	111,873	1,775	1.6%	138,071	1,913	1.4%	3,795,407	23,351	1.4%
2021	113,647	1,773	1.6%	140,003	1,932	1.4%	3,849,532	23,137	1.4%
2022	115,349	1,702	1.5%	141,826	1,823	1.3%	3,901,875	22,116	1.4%
2023	117,053	1,704	1.5%	143,653	1,827	1.3%	3,954,597	22,065	1.4%
2024	118,718	1,665	1.4%	145,494	1,841	1.3%	4,006,846	21,675	1.3%
2025	120,379	1,661	1.4%	147,302	1,809	1.2%	4,059,065	21,548	1.3%
2026	122,048	1,669	1.4%	149,140	1,838	1.2%	4,111,517	21,484	1.3%
2027	123,672	1,624	1.3%	150,907	1,767	1.2%	4,162,655	20,692	1.2%
2028	125,261	1,589	1.3%	152,637	1,729	1.1%	4,213,245	20,331	1.2%
2029	126,806	1,545	1.2%	154,347	1,710	1.1%	4,263,017	19,914	1.2%
2030	128,333	1,527	1.2%	156,032	1,685	1.1%	4,312,195	19,486	1.2%

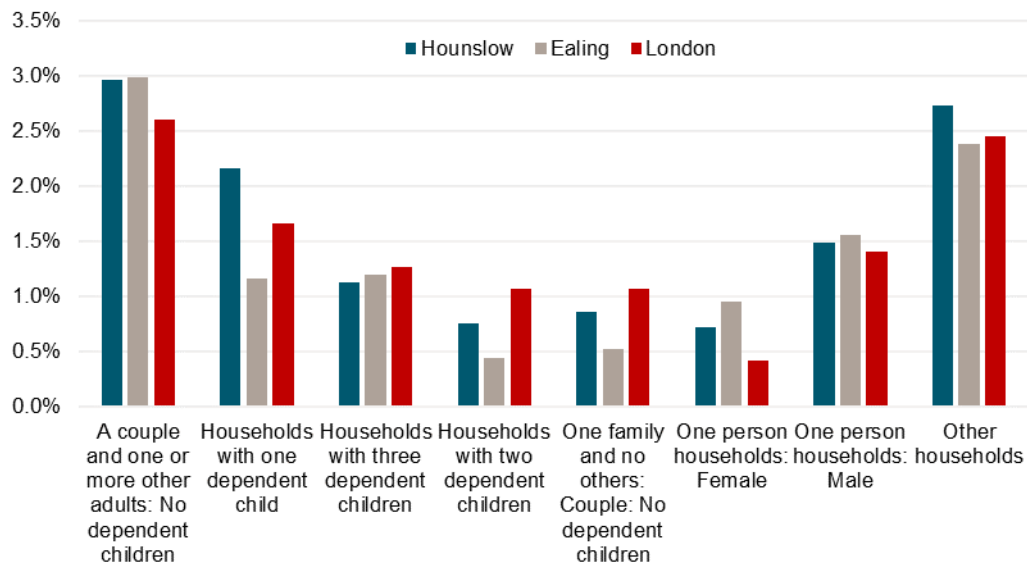
Source: Knight Frank Research, GLA

**Household by Age of Head of Household - Forecast Growth Rate 2018-2022 (%)**



Source: Knight Frank Research, GLA

**Household by Typology - Forecast Growth Rate 2018-2022 (%)**



Source: Knight Frank Research, GLA

#### 4. STUDY OF HOUNSLOW BOROUGH COUNCIL LOCAL PLAN

- The 2016 London Plan set the council a minimum annual housing delivery target of 822 units, a significant increase on the 470 units per annum as set in the 2011 London Plan. This represents a total of 12,300 units over the 15-year (2015-2030) period. A 79% increase on the previous target.
- Household projections indicate a level of housing need far in excess of the figure of 12,330 dwellings over the plan period. The GLA household projections (Central trend 2016-base) show that the number of households in Hounslow are expected to increase by an average of 1,682 per annum over the Local Plan period (2015-2030). A total of 25,224 additional households are expected in the Borough.
- The local plan set out by the Borough Council provides for exceeding the annual housing supply target (822 dpa) for the whole of the plan period (2015-2030).
- The spatial focus of new development will shift through the phases of the local plan – first to the most accessible locations for regeneration and intensification, then moving to new opportunities.
- Site allocations have been made for a range of types, sizes and spread of sites both to meet a step-change in annual housing delivery (from the previous 470 dpa to 822 dpa).

#### Hounslow Local Plan - Planned Delivery by Area (2015-2030)

District	Number of residential units				
	Phase 1	Phase 2		Phase 3	
	2015-20	2020-25		2025-30	
	Large sites (allocated and existing permissions)	Allocated sites	Broad locations	Allocated sites	Broad locations
Bedfont	0	0	31	0	100
Brentford	1454	1237	184	0	228
Chiswick	360	0	296	0	395
Cranford and Heston	313	0	42	0	220
Feltham	63	22	113	22	423
Hanworth	21	0	37	0	97
Hounslow	1255	1243	95	267	98
Hounslow West	114	98	30	250	132
Isleworth	263	131	168	69	262
Osterley and Spring Grove	198	0	15	0	50
Total from large sites	4041	2731		608	
Total from broad locations	0		1011		2005
Total from small sites	1034	805		805	
Grand total by phase	5075	4547		3418	
Grand total 2015-2030	13,040				

Source: Hounslow Borough Local Plan

NB: The ten locations described in the table below are derived from the London Borough of Hounslow Urban Context and Character Study (2014), they do not correspond to electoral wards.

- The Hounslow Local Plan uses SHLAA-based ward population projections 2013-03-26. These projections have since been revised upwards.

## AFFORDABLE HOUSING

- The Local Plan states that the Council will seek to maximise the provision of affordable mixed tenure housing on development sites and from all other sources of supply. A target of 40% of additional housing delivered across the borough between 2015-2030 should be affordable.
- In terms of affordable housing, the Local Plan proposes a split of 60% affordable/social rented and 40% intermediate housing.

## UNIT MIX

- The council recognise the need to provide a mix of housing in order to suit the need and demand for housing for the borough's population:

### General Housing need mix requirements

Tenure	One bedroom	Two bedroom	Three bedroom	Four bedroom +
Market	30%	40%	25%	5%
Intermediate	35%	40%	16%	9%
Social or Affordable Rent	25%	45%	25%	5%

Source: Hounslow Borough Local Plan

- Three-bed properties are currently the most popular stock type in the Borough. However, due to the forecast rise of smaller household sizes, the proportion of one and two-bedroom properties is higher than that of three or four-bedroom units.

## SPECIALIST HOUSING

- The number of older people is increasing rapidly, with implications for specialist housing provision and increased support and care.
- The GLA report "Assessing Potential Demand for Older Persons Housing in London – March 2014" identified potential demand for 145 specialist older persons housing units per year in the borough of Hounslow over the period 2015-2025, with 95 of these units for sale, 30 for intermediate sale, and 20 for affordable rent.
- The Borough of Hounslow does not have an allocation of student housing under the London Plan.

## DRAFT LONDON PLAN (2018)

- The recently published Draft London Plan 2018 sets a significantly increased housing target of 21,820 units between 2019/20 and 2029/30, or 2,182 units per annum. If adopted, this would increase the 15-year housing target to 30,010 units.
- The council is presently undertaking a Site Allocations and Capacity Review (SAC) to find suitable developable and deliverable sites.

## AUTHORITY MONITORING REPORT 2016/17

- The cumulative target for the last five years was 3,054 homes (three years of the lower target of 470 dpa and two years of the higher target of 822 dpa).

- The table published in the latest AMR (Authority Monitoring Report) show that Hounslow has delivered a total of 4,243 units over the past five years. This represents an average of 849 units per annum.

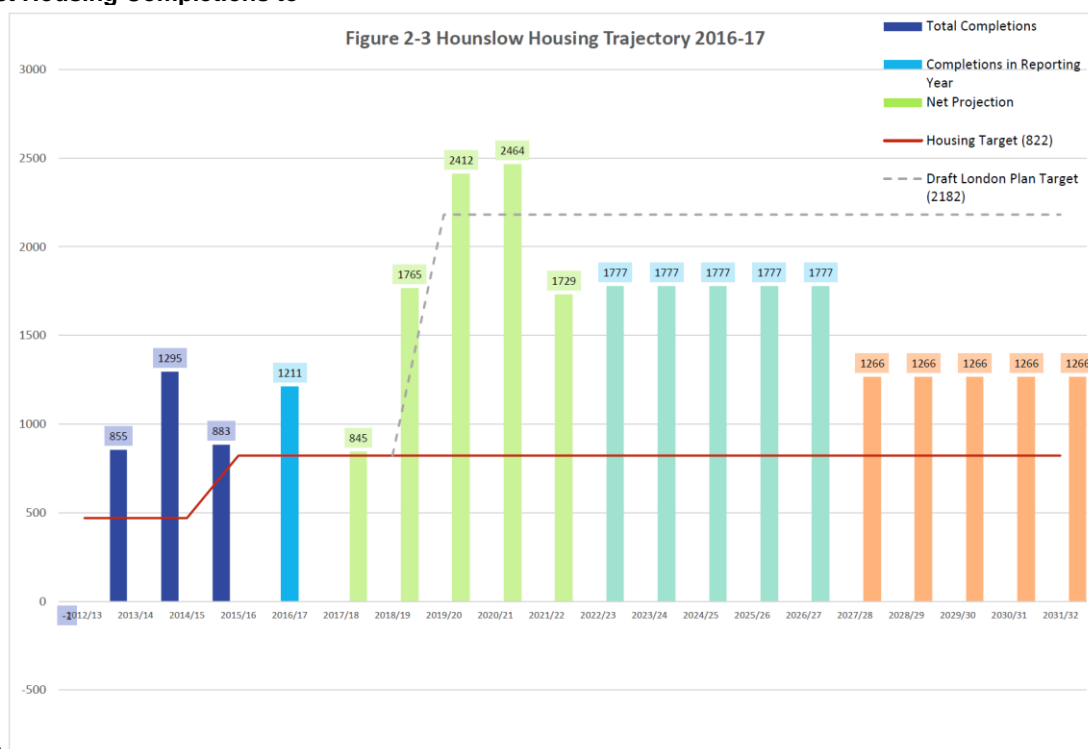
#### Housing Completions in the last five years

FY	Net Conventional Completions	Net Non Conventional Completions	Returns from Vacant	Total Delivery	Target	% Target	Cumulative Target	Cumulative Delivery
FY2012	239	43	-283	-1	470	0%	470	-1
FY2013	1083	210	-438	855	470	182%	940	854
FY2014	1085	-125	335	1295	470	276%	1410	2149
FY2015	795	-38	126	883	822	107%	2232	3032
FY2016	1149	0	62	1211	822	147%	3054	4243
Total	4351	90	-198	4243	3054	139%	3054	4243

Source: Hounslow AMR 2016/17

- The Hounslow Housing Trajectory 2016/17 (below) shows the current delivery projections relative to the current housing target (822 dpa) and the proposed target from the Draft London Plan (2,182).

#### Forecast Housing Completions to



2031/32

Source: Hounslow AMR 2016/17

- Over the past five years, a total of 1,076 units of Affordable Housing have been completed in the borough. This represents 24% of total supply. 500 of these units were for social rented tenure, 143 for affordable rent and 433 intermediate sale (e.g. Shared ownership). The tenure split for affordable tenures were; 59% affordable/social rented to 41% intermediate. This closely matches the target split of 40:60 as defined in the local plan.



## Summary

- Hounslow and Ealing boroughs have recorded muted population growth over the past five years, with 6.0% and 1.8% growth respectively, compared with 7.0% growth overall in Greater London.
- The populations of Ealing and Hounslow are forecast to grow 16.4% and 8.2% respectively over the next ten years (to mid-2027).
- Brentford ward has a relatively high proportion of 20-40 year olds, compared to Hounslow, Ealing or Greater London. Over the next ten years, these cohorts are expected to remain stable while the population of over 40's and 10-19-year-olds are expected to increase.
- The number of households in Hounslow and Ealing are expected to increase at an average annual rate of 1.44% and 1.26% (2018-2030).
- The household types with the fastest projected growth are couples without dependent children and "other" households (groups of adult sharers).
- The 2016 London Plan set the council a minimum annual housing delivery target of 822 units, for a total of 12,300 units over the 15-year (2015-2030) period.
- Household projections have since been revised upwards. The most recent GLA household projections forecast the number of households in Hounslow to increase by an average of 1,682 per annum over the Local Plan period (2015-2030).
- Due to the forecast rise of smaller household sizes, the housing need mix requirements show a higher proportion of one and two-bedroom properties.
- The recently published Draft London Plan 2018 sets a significantly increased housing target of 2,182 units per annum for Hounslow, if adopted, current projections of housing completions would fall short of this target.

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