

2001 Census Key Trends

Planning Committee
21 April 2005

1 Purpose of report

- 1.1 This report invites Committee to note the main findings from Census topic analysis carried out within City Development, including migration and travel-to-work patterns. It also sets out how Census data will inform a range of future work.

2 Summary

- 2.1 Analysis of Census 2001 data on population, housing and households, migration, travel-to-work and economic activity has produced a range of information which will be key inputs to development planning and other policy planning and initiatives. The data shows movement between locations and reveals the increasing sphere of influence of the city in terms of housing and labour markets, a consequence of generally rising mobility. The Census also gives a good picture of the spread of employment opportunities and how these have changed over the longer term.

3 Main report

- 3.1 This report follows on from a report in February 2004 which outlined the work which had been done within City Development to analyse 2001 Census data for Edinburgh. That report concentrated on broad comparative and trend information and reported that it was proposed to undertake more topic specific research. Topic based research has now been completed covering housing and households, population, economic activity, travel to work and migration. This report sets out the main findings emerging from the analysis.
- 3.2 The following is a summary of the main findings for Edinburgh, from topic based analysis:

Population

- 3.3 The total population of Edinburgh increased by 13,000 or 3% over the last ten years. The increase has been accompanied by a significant shift in the population structure which is now biased towards young working adults. Between 1991 and 2001, the proportions of working age adults (16-64), school age children (5-15) and the very elderly (85+) have increased. At the same time, the proportions of pre-school children and the student aged population (16-24) have fallen. The proportion of elderly people (65-84) in Edinburgh has fallen, compared to the national upwards trend.
- 3.4 Relative to Scotland, a greater proportion of the city's population is classified for Census purposes as 'non-white', and a large proportion of people from non-white ethnic groups were born outwith Scotland.
- 3.5 *The increase in Edinburgh's population is in direct contrast to the national trend which showed a decline of 0.4% over the same period. The increase was due entirely to in-migration which can be attributed to the city's relatively strong and growing economy.*

Housing and Households

- 3.6 Household size is falling nationally and this is mirrored in Edinburgh where the census reveals that number of households increased by 19,000 or 10% between 1991 and 2001.
- 3.7 Living arrangements vary across the city. As may be expected for city residents with a lower than average age, a high proportion of the adult population live alone. There are fewer families with dependent children in Edinburgh than in Scotland and there has been a rise in the number of single-parent families in Edinburgh.
- 3.8 More than a quarter of all Edinburgh households consist of a single person of working age. Geographically, these households are concentrated in central areas. Households in West and South Edinburgh are predominantly couples. Areas with large concentrations of public rented housing have higher than average proportions of families with dependent children.
- 3.9 The increasing number of households has resulted in an increasing demand for housing. The level of owner-occupation in Edinburgh has increased, due almost entirely to a rise in the number of households who own their property outright. The number of households with a mortgage has remained broadly the same. However more and more people are buying property to let. The private rented sector in Edinburgh accounts for a greater proportion of households (13%) than for any other Scottish local authority. The overall amount of social rented housing decreased between 1991 and 2001, mainly due to take-up under the Right-to-Buy legislation.

- 3.10 Edinburgh's population density is relatively high. The most common type of household space is in tenements and other purpose built blocks of flats. The main areas of growth have been Leith, Lochend, Meadowbank, Hopetoun Village, Dalry, the Gyle, Ellen's Glen and the Murrays. The number of vacant properties in Edinburgh fell, reflecting the buoyant housing market.
- 3.11 House sizes in Edinburgh are smaller than the Scottish average and the city has a greater proportion of overcrowded household spaces than Scotland as a whole. Owner-occupied housing is less likely to be overcrowded than rented accommodation.
- 3.12 *The census results expose the pressures on the city's housing market due to the sustained growth in population and households. These pressures are being addressed through the Council's Housing Strategy and the development plans programme including the affordable housing policy.*

Migration

- 3.13 Edinburgh has the largest net in-migration of all Scottish local authority areas. In-migrants are principally students from across the whole of the UK, families moving for employment from England, Wales and Northern Ireland, and young workers from London and Glasgow. The dominance of student in-migrants is a factor in Edinburgh having the highest turnover of residents in Scotland. A relatively high proportion of the remaining in-migrants moved from the other Lothian authorities.
- 3.14 City centre wards received most in-migration. Nearly half of the populations of some city centre wards had moved in the previous year.
- 3.15 A low proportion of moves in Edinburgh are local moves. There is a pattern of young single adults moving into the city and families moving to neighbouring areas which is reducing the average household size.
- 3.16 At the same time, Edinburgh's out-migration was greater than any other part of Scotland. As with in-migration, a significant proportion of people are moving to other Lothian authorities. The numbers migrating out to these areas exceed the numbers moving in. The greatest proportion of people leaving Edinburgh are in the 25-44 age group.
- 3.17 Migration is affecting the city's age structure. Net in-migration of age group 16-29 has taken place but there has been a net out-migration in all other age groups.
- 3.18 *The migration trends can be attributed to the health of the city's economy and the strength of its higher education sector. However they are also affected by the availability and affordability of housing. The Scottish Executive expects planning policies to provide a range of house types and locations to meet the needs of all sectors of the community.*

Travel to work

- 3.19 The number of people working in the Lothians grew by 48,000 or 14% between 1991 and 2001. Nearly half the growth took place in Edinburgh where employment grew by 9%. However West Lothian saw the fastest rate of growth at 37%.
- 3.19 The Lothians as a whole is a net importer of labour, with a net inflow of 31,000 workers. The number of people commuting into the Lothians had increased significantly.
- 3.20 Edinburgh remains the employment hub for the Lothians. Just over two thirds of all workers live within the city, with some 85,000 commuting in to work every day. This has increased by 13,000 or 18% since 1991.
- 3.21 Central Edinburgh retains the highest concentration of jobs in the region and has a particularly wide geographical draw of workers. Central Edinburgh is the second largest employment destination in Scotland, after central Glasgow.
- 3.22 Commuting distances have increased in the Lothians over the last two decades. Unsurprisingly, Edinburgh residents had the shortest commuting distances of all people in the Lothians.
- 3.23 The level of in-commuting to Edinburgh by car grew by more than a third in the census period. Edinburgh has a higher number of residents who drive to work than any other local authority in Scotland except Fife. At the same time, travel by train, bicycle and on foot to and within Edinburgh has increased. The number of people travelling to work in Edinburgh by bus fell between 1991 and 2001 although the proportion of people travelling by bus is the highest in Scotland.
- 3.24 However, there is some evidence from non-Census sources to suggest that, taking into account trips for other purposes as well as work, overall bus usage in Edinburgh has increased in recent years. The Scottish Transport Statistics certainly indicate a reversal of the previous decline in bus patronage, with the number of local bus journeys in the Lothians increasing from 98 million in 1999 to 119 million in 2003. It may be that this recent trend also extends to commuting to work. The Scottish Household Survey provide some more recent information which indicates that bus travel to work by Edinburgh residents has stabilised at a level of about 25% since 2000, close to the Census figure of 26%.
- 3.25 Settlements with particularly high numbers of people commuting to work in Edinburgh include Livingston, Musselburgh, Penicuik, Dalkeith, Dunfermline, Tranent, Prestonpans and Linlithgow. In Midlothian as a whole more people work in Edinburgh than in Midlothian itself. Some smaller settlements outside the Lothians also have a very significant Edinburgh work focus, notably West Linton, Dalgety Bay, Invekeithing and Peebles.

3.26 *The city continues to be the main focus for employment in the city-region, though West Lothian is becoming a significant sub-regional centre. The transport movement this generates is being addressed through the transport projects and initiatives set out in structure and local plans, the regional transport strategy and the local transport strategy. The census demonstrates the success of recent policies to support more sustainable forms of transport and focus employment in accessible locations.*

Economic activity

3.27 The rate of economic activity in Edinburgh is high and the largest proportion of the population is employed full time. There is a trend for more people to work at or from home, perhaps attributable to the growth in self-employment.

3.28 Edinburgh has a relatively well qualified population, with a high proportion of its workforce employed in professional and managerial jobs.

3.29 More men than women are economically active but the imbalance is decreasing.

3.30 An increased proportion of those living in Edinburgh work part-time, correspondingly the proportion of those working full-time has decreased.

3.31 The industrial structure of Edinburgh is dominated by the service sector and as a result is not as diverse as other cities.

3.32 Levels of economic activity vary considerably across the city.

3.33 *The high levels of economic activity can be attributed to a strong local economy but may also be linked to other factors such as the level of house prices. The pockets of low activity are addressed through the Council's Strategy "Closing the Gap".*

Common Themes

3.34 Some recurring themes emerge, reflecting the fact that the issues from each of the separate topics are inherently linked. Increasing population, especially of working age, is a factor in increasing the demand for housing. The decrease in household size and the increase in the number of single people living in the city is another factor. Many single adults are sharing accommodation, especially in rented properties. There is a net outflow of families out of Edinburgh, but many working parents are continuing to work in the city.

3.35 Jobs growth in Edinburgh over recent years has been significant. With a larger workforce than working residents, the level of in-commuting is relatively high. While most of the jobs in the Lothians have concentrated in Edinburgh, a large part of the workforce continue to live outside the city.

- 3.36 The decentralisation of offices that has occurred in Edinburgh in recent years has altered the pattern of commuting across the city, changing the traditional areas of travel to work, although the city centre remains the regional employment hub.
- 3.37 The capacity of transport networks is a critical issue affecting Edinburgh's ability to satisfy its growing labour requirement. There is also increasing competition for workers with expanding economies such as West Lothian. The data shows that the biggest increase in commuting travel up to 2001 was by car. However, other data suggest that recent investment in buses, trains, cycling and walking has now started to pay dividends.
- 3.38 While the city as a whole is thriving economically, some areas have low levels of economic activity.
- 3.39 The city clearly remains the economic hub of the region. Its continued strength will depend on the general health of the industries operating but also on the ability to attract a workforce to this area.

Role of Census Data in Development Planning

- 3.40 The Census outputs are key inputs to current development planning work. Detailed local analysis is providing baseline information for the preparation of the Edinburgh City Local Plan. It will also be a key input to the review of the Structure Plan (ELSP).
- 3.41 A report on the commencement of work on the early Structure Plan review was considered by the Joint Liaison Committee (ELSPJLC) on 21 March. This confirmed that the approved ELSP contained a commitment to an early plan review, starting in 2006 and leading to a replacement plan by 2008.
- 3.42 To meet the aim of replacing the plan by the end of 2008, a finalised plan would have to be submitted to Ministers by the end of 2007. To achieve that, work needs to start now. The first stage would be to produce a strategic issues and options paper for public consultation. This would set a vision for the long-term: set out the opportunities and challenges facing the region, the levels of growth that could be planned for and their land use consequences, and the new transport and other infrastructure needed to realise each strategic option.
- 3.43 This paper will be informed by several processes currently underway or about to be commissioned, including the recently available Census 2001 outputs, Housing Land Audits 2004 and 2005, the results of the regionwide Housing Needs Assessment, and the findings of the first annual monitoring report (required by end 2005).

- 3.44 A three-stage indicative programme would aim to publish this vision Paper by the end of 2005, a Consultative Draft plan and Strategic Environmental Assessment (SEA) by the end of 2006 and a Finalised Plan by the end of 2007. To establish the scope and timing of this project, and assess the staff and other resources required, a comprehensive project brief is being prepared. It will set out the individual work packages needed to progress the structure plan review, and identify lead authorities and agencies, with an estimate of costs.

Further Information

- 3.45 A series of reports give more detailed information on these trends are available. These are listed under Background Papers at the end of this report. Most of these are on the Planning and Building Control page of the Council's web site.

4 Conclusions

- 4.1 Topic-based Census analysis has now been completed and made widely available via the Council's website. It will play a vital role in determining future development needs, prioritising investment, and tailoring policies and service delivery to meet local needs.
- 4.2 The census results underline the continuing strength of the city's economy and reveal some of the consequences of that growth, particularly pressures on the housing market and an increase in in-commuting. However it also demonstrates the success of the Council's transport initiatives in encouraging more sustainable modes of transport and focusing employment in accessible locations.
- 4.3 By identifying the extent of the city's influence and its economic relationships with other areas within and beyond the Lothians, the analysis will also be a key input to the review of the Structure Plan, beginning this year. In the longer term it will also inform a wider Edinburgh City Region Plan. Detailed local analysis is also providing baseline information for the preparation of the Edinburgh City Local Plan.
- 4.4 The Census results are clearly relevant to a range of Council services. The Chief Executive's Management Team will be considering these issues in due course and a separate report will be prepared for the Council Executive.

5 Financial Implications

- 5.1 None.

6 Recommendations

- 6.1 It is recommended that the Committee notes the key trends emerging from Census 2001 topic analysis and the importance of this work in informing the review of development plans and in shaping the Council's overall service delivery.



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13.4.05

Appendices	None
Contact/tel	Lindsay Robertson 469 3597
Wards affected	Citywide
Background Papers	<p>Edinburgh's Census 2001: Key Demographics *</p> <p>Edinburgh's Census 2001: Housing and Households *</p> <p>Edinburgh's Census 2001: Migration *</p> <p>Edinburgh's Census 2001: Economic Activity in Edinburgh and the Lothians *</p> <p>Edinburgh's Census 2001: Travel to work patterns and mode of travel to work in Edinburgh & the Lothians</p> <p>Edinburgh Census 2001: Ward Factsheets</p> <p>Edinburgh Census 2001: Local Development Committee Factsheets</p> <p>Edinburgh Census 2001: City Comparisons</p> <p>Edinburgh Census 2001: City Trends</p> <p>Edinburgh Census 2001: Census Atlas</p>

*Copies of the above papers are available for inspection in group offices. Most are also available on the Council's website www.edinburgh.gov.uk (Planning, Census 2001). Reports marked * are in the process of being uploaded and in the meantime can be obtained by contacting the report author.*