CITY INTELLIGENCE

The State of London

A review of London's economy and society

June 2023

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Contents

1: INTRODUCTION

This is the third edition of the State of London report, a publication that provides the most up-to-date statistics on London's performance across a range of economic and social outcomes. The report brings together an array of datasets that are organised thematically. The aim is to provide a selection of some of the most important indicators informing the work of the Mayor, the London Assembly, and stakeholders in London.

As the city continues to recover from the COVID-19 pandemic, it is facing other major challenges, a key one being rising inflation and the knock-on impact this is having on the cost of living for Londoners. The report sheds light on how London's people, businesses and localities are addressing current economic and social challenges. Data are also provided on some of London's longer-term structural challenges that have been identified and prioritised by the Mayor, such as air quality, housing affordability and inequality.

Indicators in the report have been selected with the aim of providing a broad and high-level understanding of a particular topic or theme – we have tried to include those that update relatively frequently and without too great a lag. Nevertheless, not all indicators and datasets fit these criteria. While comprehensive in its coverage, this report is by no means exhaustive, and links to further information on the different topics are provided with each chapter.

Quarters referred to in the report are either calendar or financial as labelled. It is not possible to use a consistent format throughout as data sources vary considerably. Care should be taken when interpreting changes in quarterly data; some of the differences may be due to seasonal variation, while others could be a result of other factors. Longer time series have been provided where available to provide an understanding of longer-term trends.

We welcome any feedback you have on this report via email to: intelligence@london.gov.uk.

Latest data are provided at the time of drafting the report in May 2023. A companion State of London Dashboard is published online where the charts in the report can be found. The Dashboard will be in beta phase while we continue to develop it.

2: CONTEXT

This short section provides some basic information about London to put the trends outlined in this report in context.

People

- The latest estimate gave the population of London as **8.8 million according to the Office for National Statistics' 2021 mid-year estimates.**
- The population of London could reach **10 million by 2040** according to our trend-based projections[1].
- London has a highly diverse population: **46% of Londoners belong to a Black, Asian, Mixed or Other ethnic group** (14% Black, 21% Asian, 6% Mixed and 6% Other ethnic group)[2].
- Most births in London are to mothers born overseas: **57% of London births were to mothers born overseas in 2021** compared to 23% for the rest of England and Wales.[3]
- There are large inequalities in many dimensions across the city. Household deprivation data from the 2021 Census reveals that just 39% of households in Richmond upon Thames show any aspect of deprivation, compared with 62% of households in Barking & Dagenham. At ward level, the differences are even more extreme, with only 29% of households in Northcote ward (Wandsworth) showing any aspect of deprivation for example, contrasting with 74% of households in Southall Green (Ealing).
- Around **5 million London residents aged 16-64 are economically active** in London, with 4.7 million of them in employment[4].

Economy

- London's economy was worth around **£527 billion** in 2021 as measured by Gross Value Added, accounting for 23% of UK economic output[5].
- There are around **1 million registered private sector businesses** in London, which represent approximately 19% of the total in the UK[6].
- There are around **6.3 million workforce jobs** in the city filled by both commuters and London residents (as of December 2022)[7].
- London's workers are highly productive – **GVA per job is on average £81,400 as of 2021,** which is 40% higher than the UK average[8].

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[1] GLA City Intelligence Unit. 2021-based demographic projections, January 2023.
[2] Census 2021.
[3] ONS Births by mother's country of birth.
[4] ONS Labour Force Survey via Nomis.
[5] ONS Regional economic activity by gross domestic product, UK: 1998 to 2021
[6] BEIS Business population estimates for the UK and regions, 2022.
[7] ONS Workforce Jobs, December 2022.
[8] GLA Economics calculations using ONS regional GDP and workforce jobs data.

- Despite London's prosperity, it has deep-seated inequalities. For example, recent polls show that 52% of Londoners struggled to meet essential food and shopping needs, while 47% of renters think they will struggle to pay their rent in the next six months, and 40% think they will struggle with their energy bills.[9]

Place

- London is comprised of **32 borough councils and the City of London**.
- London covers almost **160,000 hectares,** making it the smallest region in the UK by land area but with the highest population density (56 people per hectare)[10].
- **About half of London's landmass is either 'green' or 'blue',** which includes parks, gardens, trees, green spaces, rivers and wetlands[11].
- There are approximately **3.7m residential dwellings** in London, of which 49% are owner occupied, 30% are privately rented, and 21% are social housing[12].

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[9] GLA YouGov poll April 2023, n=1080, 28th April-3rd May 2023
[10] GLA City Intelligence Unit. Land Area and Population Density by Ward and Borough.
[11] GLA City Intelligence Unit analysis of Ordnance Survey and Verisk Analytics GeoInformation Group UKMap data, 2019.
[12] DLUHC Dwelling Stock Estimates in England: 2022.

3: KEY STORIES FOR LONDON

The following summary highlights findings across a range of chapters which show how the city is developing and some areas of change.

London has continued to recover from the pandemic since the previous edition of this report in January 2023, but the impact of inflation on the city has become increasingly evident as it affects both households and businesses.

Economy and Labour Market

While London's economic growth outpaced the national average in 2021 and 2022, GLA Economics forecasts a slowdown during 2023 and 2024 despite the capital avoiding a recession.

The number of workforce jobs in London exceeded pre-pandemic levels by December 2021 and rose strongly throughout 2022, while both the employment and unemployment rates also increased during Q1 2023 compared to Q4 2022.

London's economic growth outpaced the UK's in 2021 and 2022, but we forecast a slowdown during 2023 and 2024

GDP for London and the UK, indexed to their levels in Q4 2019
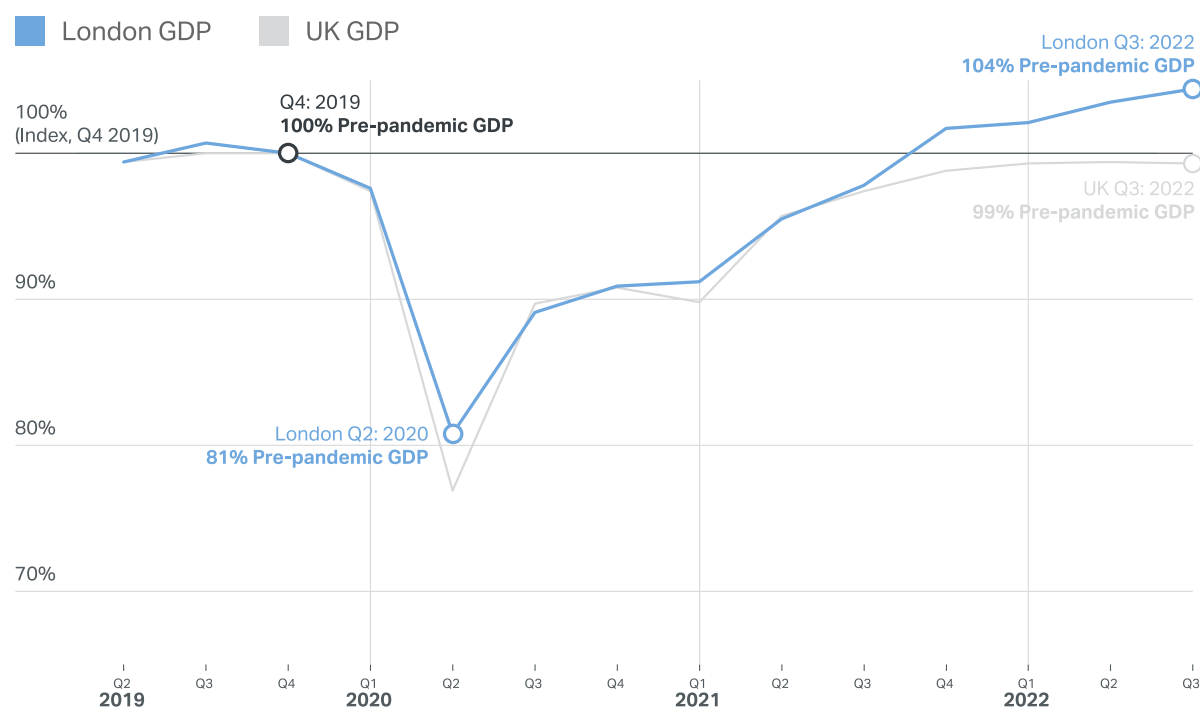
Income, Poverty and Destitution

Income inequality within London is stark, with the richest tenth of Londoners having almost 10 times the income of the poorest tenth (twice the ratio for the rest of the UK).

The reduction in the total number of Universal Credit claimants in London seen to mid-2022 has started to reverse over the last year.

15% of Londoners said they were struggling financially, with a further 5% not able to manage, while 28% were just about managing.

Income inequality within London is stark, with the richest tenth of Londoners having almost 10 times the income of the poorest tenth

Difference in weekly income (after housing costs) between top and bottom 10% - 2019/20 - 2021/22

£1,400

£1,319

£1,200

90%

£1,000   £1,009

80%

£800

9.7x difference
between top 10%
and bottom 10%

70%

£600   **5x difference**
60%   between top 10%
                                        and bottom 10%

50%

£400
40%

30%

20%

£200

10%   £202

£136

£0

London   Rest of UK
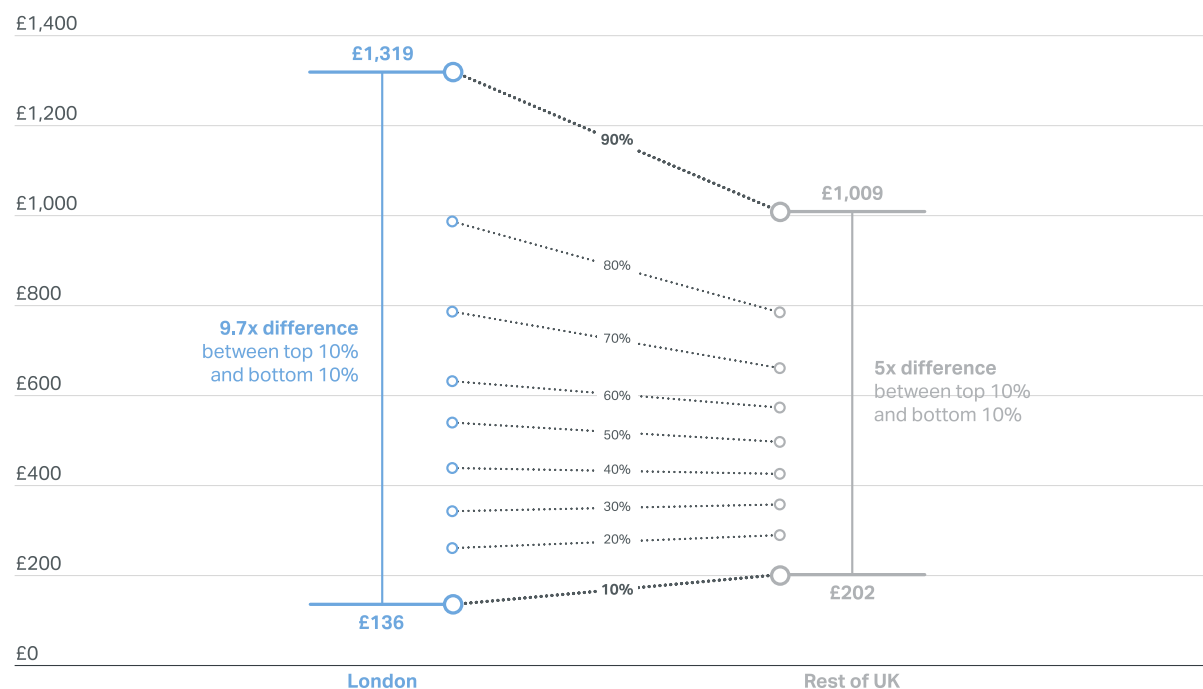
Transport and Infrastructure

Transport demand in London has steadily risen during 2022 to reach its current levels, which have been steady during 2023.

Bus and tube journeys both remain below pre-pandemic levels. Nevertheless, recent travel and spending data points to a strong recovery in the Central Activities Zone (CAZ) over the past several months.

Transport demand in London has steadily risen during 2022 to reach its current levels, which have been steady during 2023

Number of journeys by Bus and Tube on the TfL network

Bus Journeys   Tube Journeys

6 Million (m) Journeys

Pre-pandemic level (Bus)

Bus - 6th Apr '23: **4.25m**

4m

Pre-pandemic level (Tube)

2m

Tube - 6th Apr '23: **2.7m**

0

April   July   October   **2021**   April   July   October   **2022**   April   July   October   **2023**   April
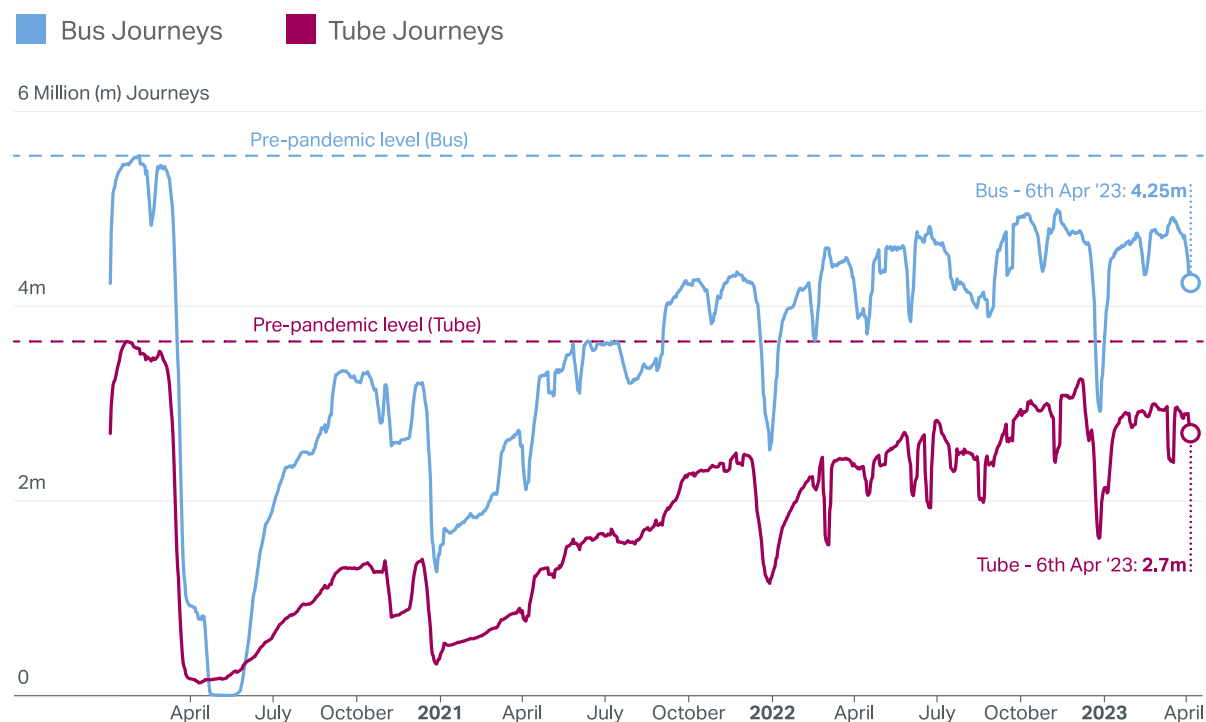
Communities

Between 2020-21 and 2021-22, informal volunteering rates decreased significantly in London (from 55% to 48%), and a similar decrease was seen across England (from 54% to 46%).

Londoners were most trusting of medical institutions. However, trust in these institutions had declined by February 2023. Meanwhile, trust was lowest for London media (17%), borough councils (20%) and the Metropolitan Police Service (21%).

Between 2020-21 and 2021-22, informal volunteering rates decreased significantly in both London and England
Proportion of those in London or England, who formally or informally volunteered at least once in the last year (%)
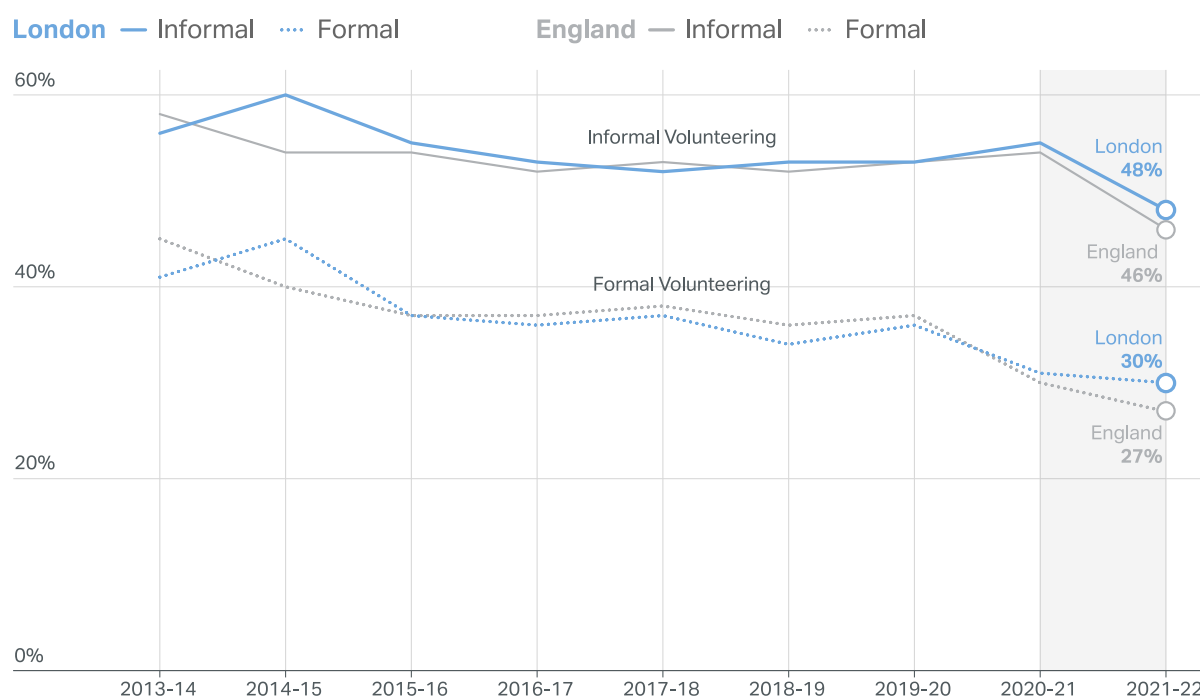
Young People & Education

From 2020/21 to 2021/22, there was an uptick in under 19s and 19-24 year olds starting apprenticeship programmes in London.

The percentage of eligible children using at least part of the Free Early Education Entitlement has increased sharply from 2021 to 2022, following a decline from 2020 to 2021, both at London and England levels.

In London, from 2020/21 to 2021/22, there was an uptick in under 19s and 19-24 year olds starting apprenticeship programmes

Number of apprenticeship programme starts and completions in London for under 19s and 19-24 year olds between 2014/15 and 2020/21

19-24 year olds — Starts ···· Completions   **<19 year olds** — Starts ···· Completions

19-24 Starts
12,110

<19 Starts
4,820

19-24 Completions
4,460

<19 Completions
1,800

15,000

10,000

5,000

0

2014/15　2015/16　2016/17　2017/18　2018/19　2019/20　2020/21　2021/22
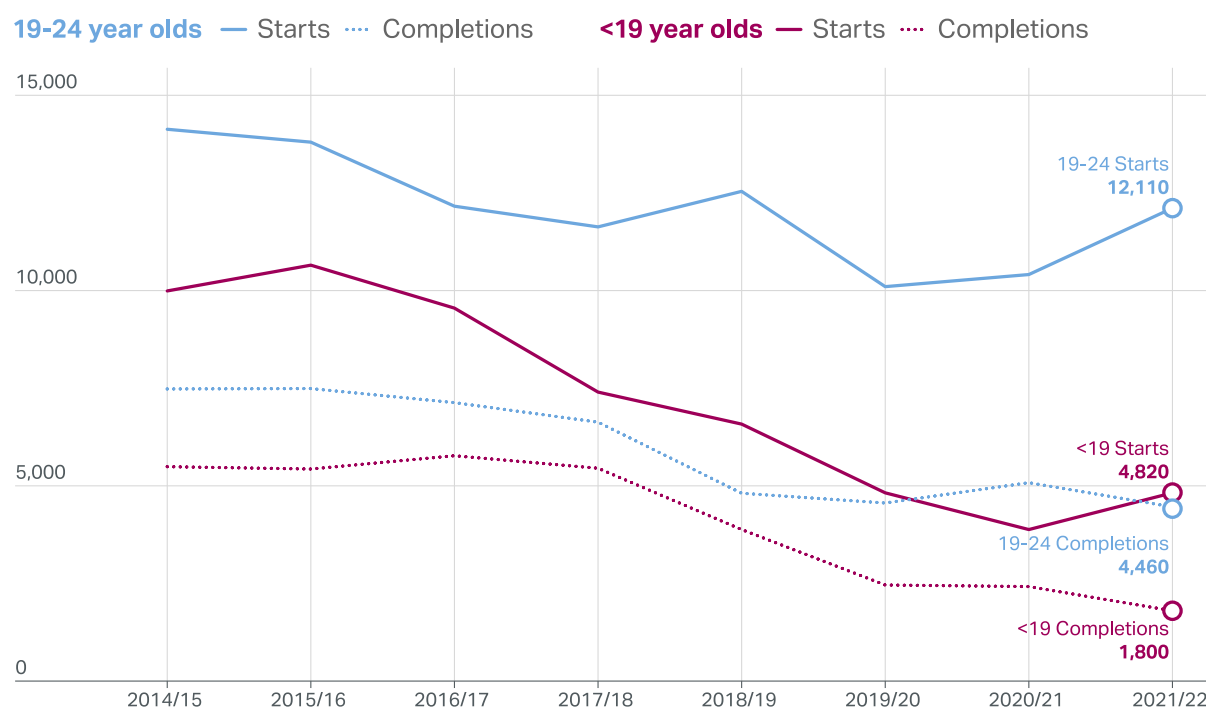
Health, Wellbeing and Inequality

Indices of wellbeing have lower values in London compared to England. After steep improvements in values at the start of this decade, the COVID-19 pandemic led to a spike in anxiety levels and a drop in levels of life satisfaction in London.

Healthy life expectancy (HLE) at birth continues to show substantial inequality across London, with a gap of more than 12 years lived in good health between the boroughs with the best and worst values.
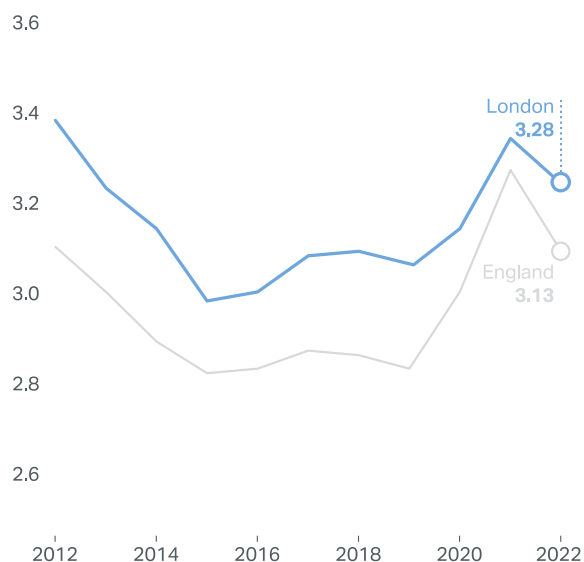
In London, the COVID-19 pandemic led to a spike in anxiety levels and a drop in levels of life satisfaction.
Anxiety and life satisfaction for adults in London and England, 2011-12 to 2021-22
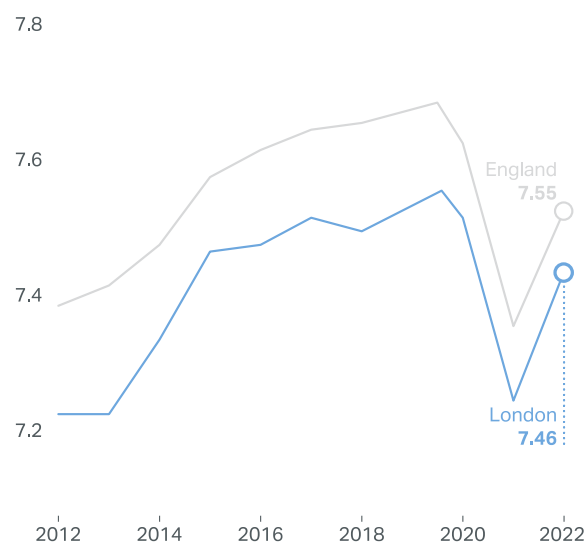
■ London   ■ England

How anxious did you feel yesterday?
Mean responses on a scale from 0-10

How satisfied are you with your life nowadays?
Mean responses on a scale from 0-10

Housing

Despite increasingly challenging economic conditions including rising costs and falling demand, the supply of new homes in London - as measured by the latest data on planning permissions and by Energy Performance Certificates for completed homes - is holding relatively steady compared to levels in recent years.

The sharp growth in private rents for new tenancies has resulted in increasingly unaffordable rents in comparison to tenant incomes.

The supply of new homes in London is holding relatively steady compared to levels in recent years
Annualised number of new homes granted planning permission in London, Q1 2012 to Q4 2022

New home approvals (HBF)
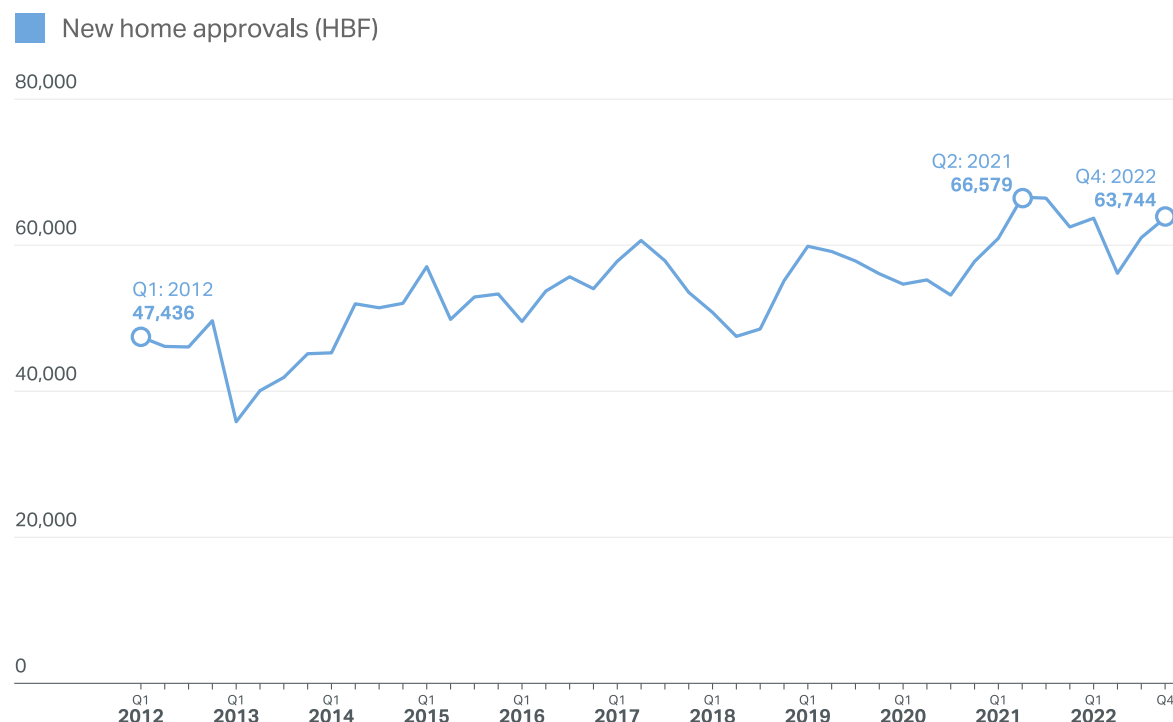
Environment

Air quality, in particular roadside NO_2 concentrations in Central, Inner & Outer London, have been decreasing since 2017, with Central London experiencing a more significant fall due to the Ultra Low Emissions Zone (ULEZ) and reduced traffic during the pandemic.

Household waste collection by Local Authorities in London dropped between 2020/21 and 21/22, with the gap in performance compared to England widening compared to pre-COVID years.

Nitrogen Dioxide concentrations in Central, Inner and Outer London roadside areas have been decreasing since 2017

Roadside Nitrogen Dioxide (NO_2) µg/M³, January 2015 - April 2023
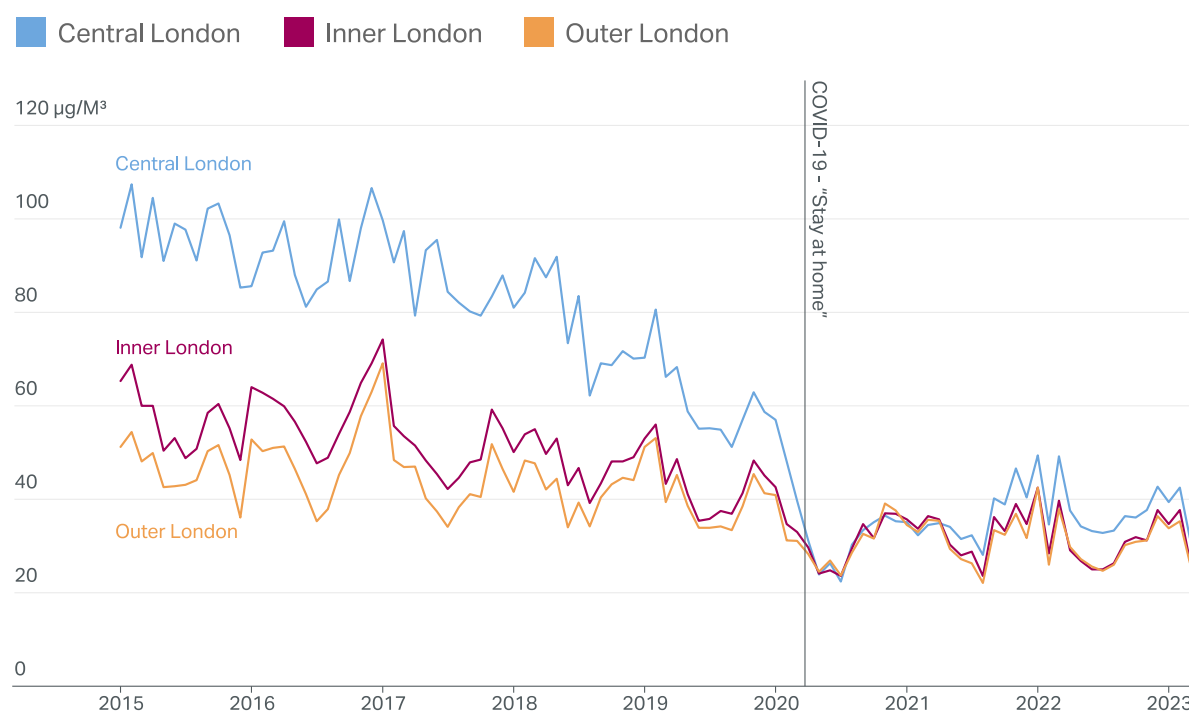
4: DEMOGRAPHY

This chapter provides data on London's demographics, including recent trends and releases from the 2021 Census.

For more population statistics and analysis, including demographic projections, see the demography pages of the London Datastore.

Detailed analysis of how London's population changed during the pandemic can be found in the two-part report 'Population change in London during the pandemic'.

Further analysis and reporting of 2021 Census data for London is published through the GLA's Census Information Scheme. In addition, there has been growing concern that high housing costs may be precipitating a decline in the number of families living in Inner London. To help address these concerns, the GLA is planning to publish analysis looking at how numbers of children and families in London are changing, as well as the drivers of recent changes.

Population change

Figure 1: Estimated population of London 2001 to 2021
Total population (millions)
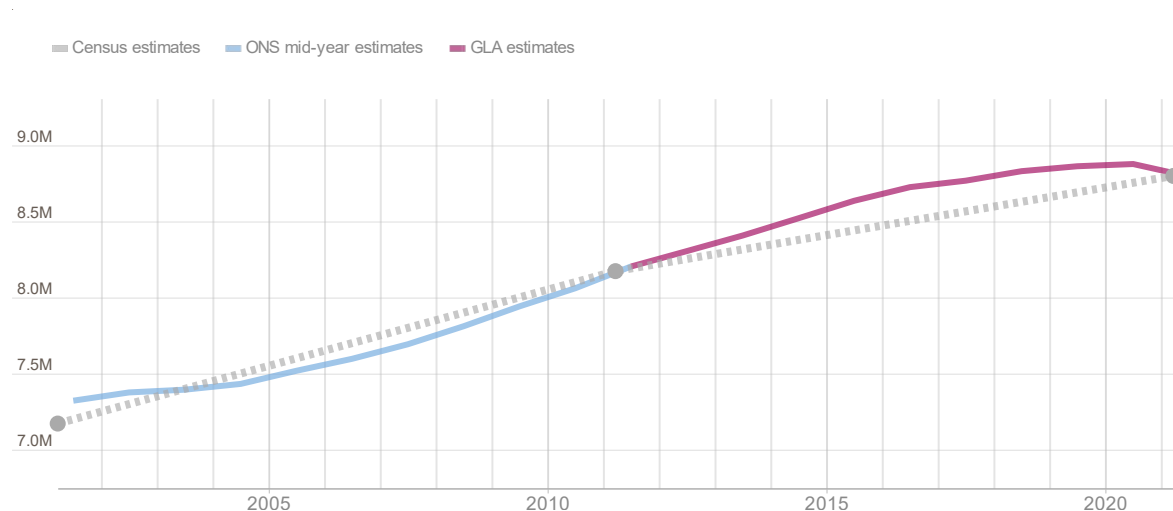
Sources: ONS mid-year estimates, GLA Modelled Population Backseries, ONS Census estimates

The 2021 mid-year estimates published by ONS in December 2022 gave London's population as 8.80 million. This represents an increase in the population of almost 600 thousand over the course of the decade, a far lower rate of increase than in the previous decade, when London's population grew by close to 900 thousand.

Supporting data published by ONS showed that the act of rebasing the 2021 estimates to account for the results of the Census resulted in London's population being some 133 thousand lower than it would otherwise have been, indicating that previous estimates had become increasingly inflated over the course of the decade.

The COVID-19 pandemic led to a temporary drop in London's population that began in March 2020 and likely reached a peak in early 2021. Quantifying the size of this effect is made challenging by both the disruption caused by the pandemic to many of the key data sources used to measure population change, and by the existing problems in the official estimates.

London's current population is likely to be substantially higher than the 8.8 million usual residents captured by the Census, but exactly how much higher is likely to remain the subject of speculation until at least Autumn 2023, when the official estimates for mid-2022 are released.

Figure 2: Population of London 2001 to 2021 by whether born in UK

Total population (millions)
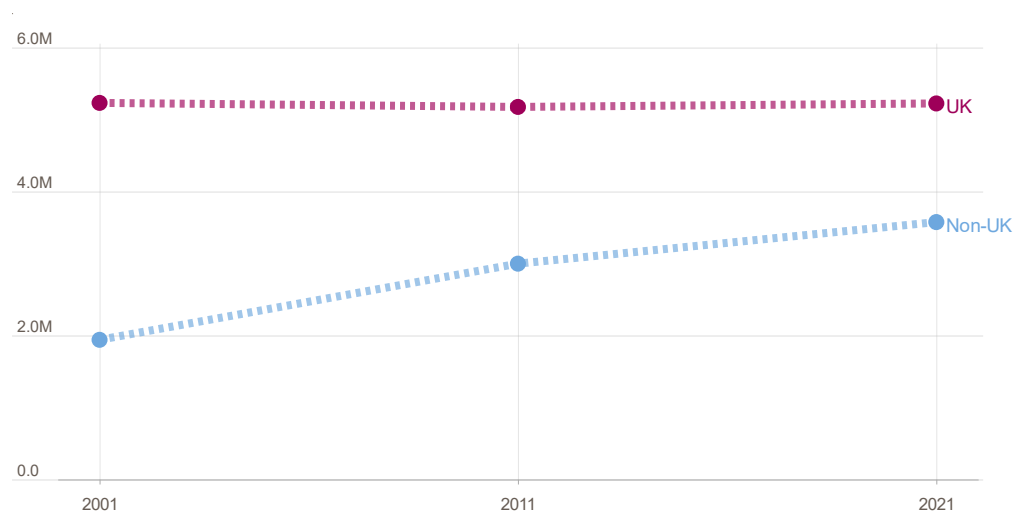
Source: ONS Census estimates

The first tranche of data from the 2021 Census included a breakdown of population by country of birth. This data shows that 41% of London residents were born outside of the UK – up from 37% in 2011, and 27% in 2001.

The size of the UK-born population of London has changed little over the last two decades. The 2021 Census estimated 5.22 million UK-born residents, 48 thousand more than in 2011 and 8 thousand fewer than in 2001.

In contrast, the population born outside of the UK has increased by 85% over the same period. The 2021 Census estimated that there were 3.58 million non-UK born residents in London, 580 thousand more than in 2011 (3.00 million) and 1.64 million more than in 2001 (1.94 million).

Figure 3: Non-UK born population of London 2001 to 2021 by place of birth

Total population (millions)
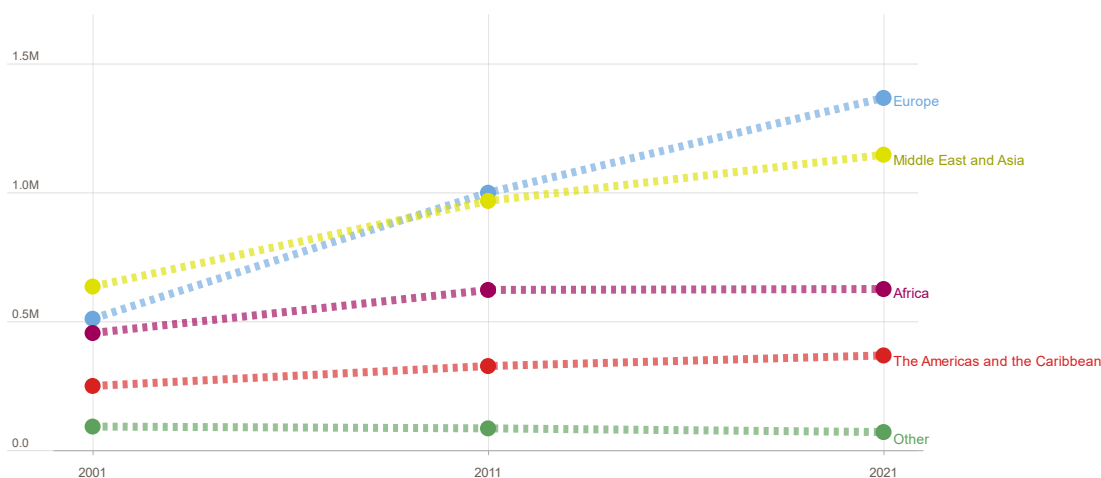
Source: ONS Census estimates

The data shows that the majority of the increase since 2011 is accounted for by residents born in Europe (up 37% from 999 thousand to 1.37 million), and the Middle East and Asia (up 19% from 967 thousand to 1.15 million).

Annual births

Figure 4: Annual births in London 2001 to 2023

Annual live births for year ending (thousands)
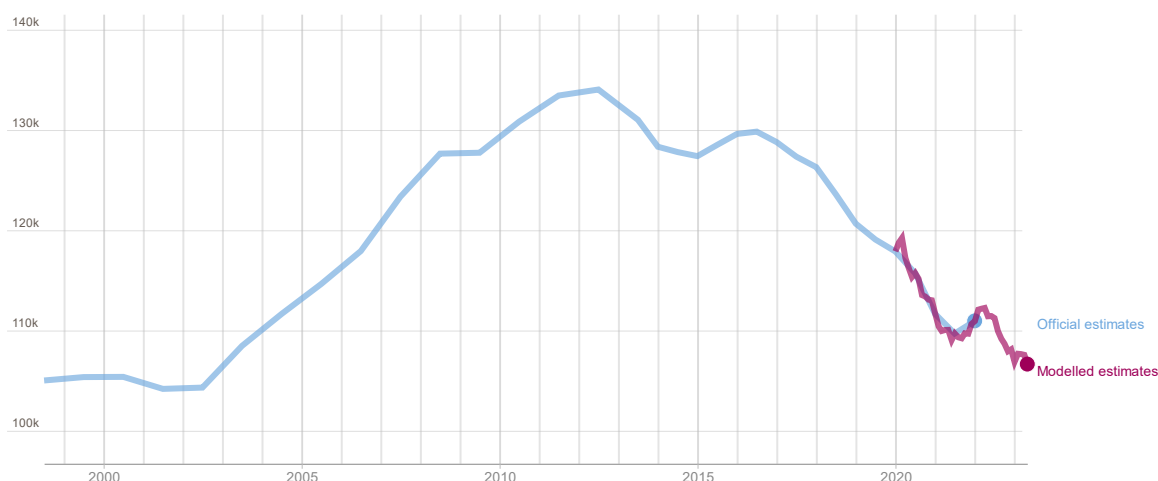
Sources: ONS Live birth estimates, ONS mid-year estimates, GLA modelled births

Annual births in London rose throughout the 2000s, peaking at 134 thousand in calendar year 2012. The latest official estimates for calendar year 2021 show 111 thousand births, 17% below the 2012 peak.

The GLA produces monthly modelled estimates for births based on the relationship between annual births and the number of persons present on patient registers. Such

modelled estimates can be produced with less lag than the official estimates and therefore provide an indication of more recent trends.

The modelled estimates indicate that annual births fell at an increased rate following the start of the pandemic, reaching a low of approximately 108 thousand in the year to mid-2021, before rising sharply again. This reversal proved to be short-lived: annual births reached 112 thousand in the year to April 2022, before resuming their downward trend.

This data is consistent with the notion that the pandemic caused many people to temporarily delay plans to have children. This led to an initial period of lower numbers of births than would otherwise have occurred, followed by one with higher numbers as postponed plans were finally realised.

Figure 5: Annual births in London by mother's region of birth 2001 to 2021
Annual live births by calendar year (thousands)
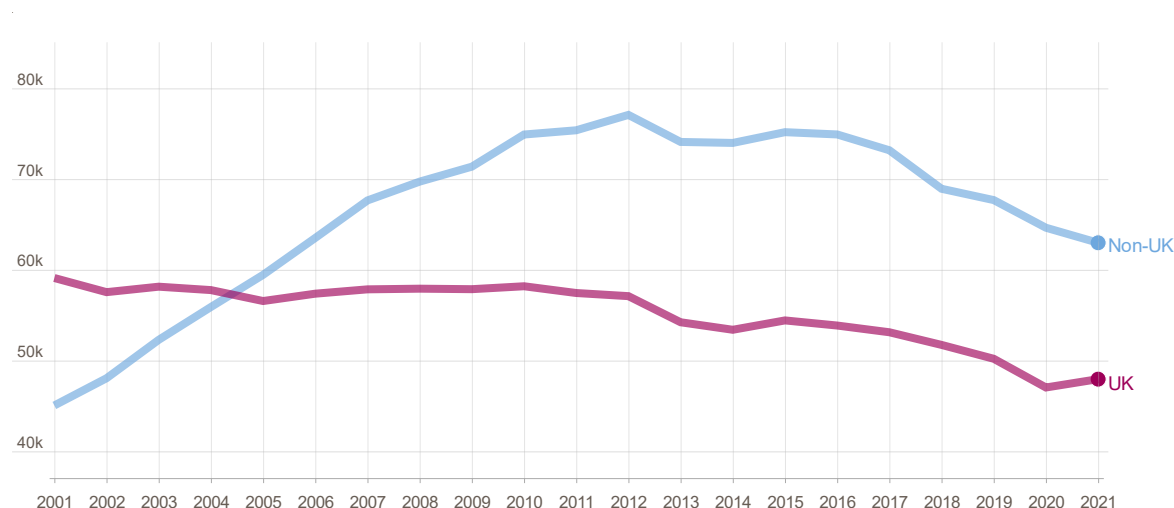
Source: ONS Live birth estimates

The latest official data on births released by ONS shows that of the 111 thousand births in London that occurred in 2021, 48 thousand (43%) were to mothers who were born in the UK and 63 thousand (57%) to mothers born outside of the UK. This ratio is the same as it was when annual births in London were at their peak (in 2012), with the subsequent decline in overall numbers being a result of similar proportional falls in the number of births to both UK and non-UK born mothers.

Figure 6: Annual births in London by mother's place of birth 2001 to 2021

Annual live births by calendar year (thousands)

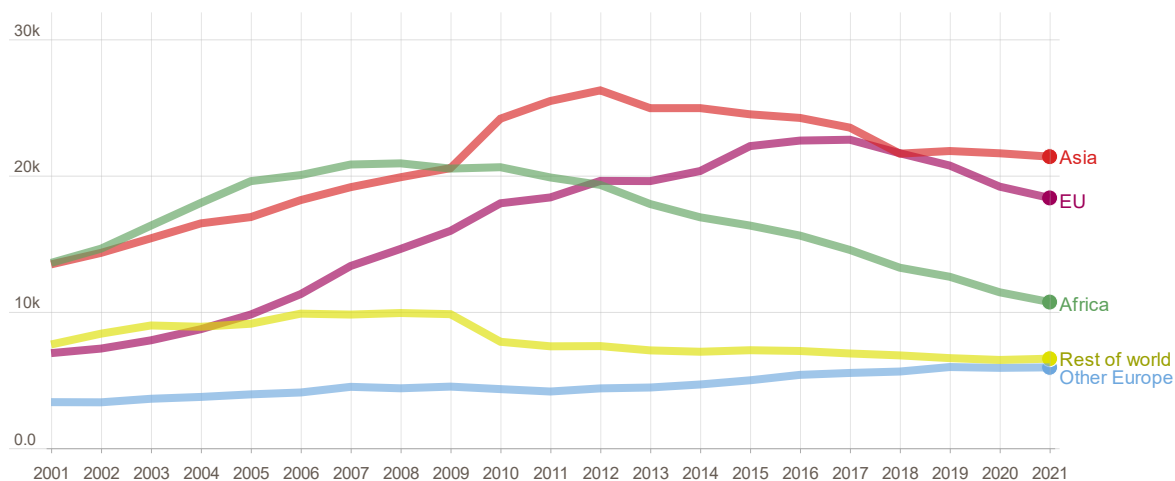*Source: ONS Live birth estimates*

Though the proportion of births to non-UK born mothers has been relatively stable over the last decade, the data reveals a significant difference in the trends for mothers from different world regions.

The boom in births that took place between 2002 and 2012 was driven by large increases in the number of children born to mothers from Africa, Asia, and the European Union.

Since then, the number of births to mothers born in Africa has almost halved, from 19 thousand in 2012 to just 11 thousand in 2021. Over the same period, births to mothers born in Asia have fallen by a smaller proportion, from 26 to 21 thousand.

Annual births to EU-born mothers rose steadily until 2016, when there were close to 23 thousand. This upward trend reversed following the Brexit referendum, with births in 2021 (of 18 thousand) back in line with those from a decade earlier.

5: THE ECONOMY & LABOUR MARKET

This chapter presents a summary of the latest indicators related to the economy, including data on businesses, jobs and skills in London.

It includes metrics on London's economic output, consumer expenditure and confidence, foreign direct investment, and business births and closures. There are also statistics on the total number of jobs in London and a breakdown by sector, as well as other headline labour market indicators (such as the employment, unemployment and inactivity rates). It also features some statistics related to job quality, low pay and skills attainment.

Most of the indicators cover trends to late 2022 or early 2023. Some indicators, such as qualifications or employee jobs below the London Living Wage, are based on annual estimates that are updated less frequently.

For more information on the state of London's economy, see the monthly GLA Economics publication, 'London's Economy Today'. An assessment of future prospects for the city's economy, including economic forecasts, is provided in the bi-annual publication 'London's Economic Outlook'. More detailed analysis on London's labour market, including the GLA Economics monthly Labour Market Update, can be found on the London Datastore. For in-depth analysis on fairness and inclusivity in London's economy, see the Economic Fairness section of the London Datastore.

The Mayor of London and London Councils' strategy to support London's economy, is set out in the 'Economic Recovery Framework for London'.

Economy and Business

Figure 1: London's output recovery from the pandemic, measured by real Gross Value Added

Index, Q4 2019 = 100
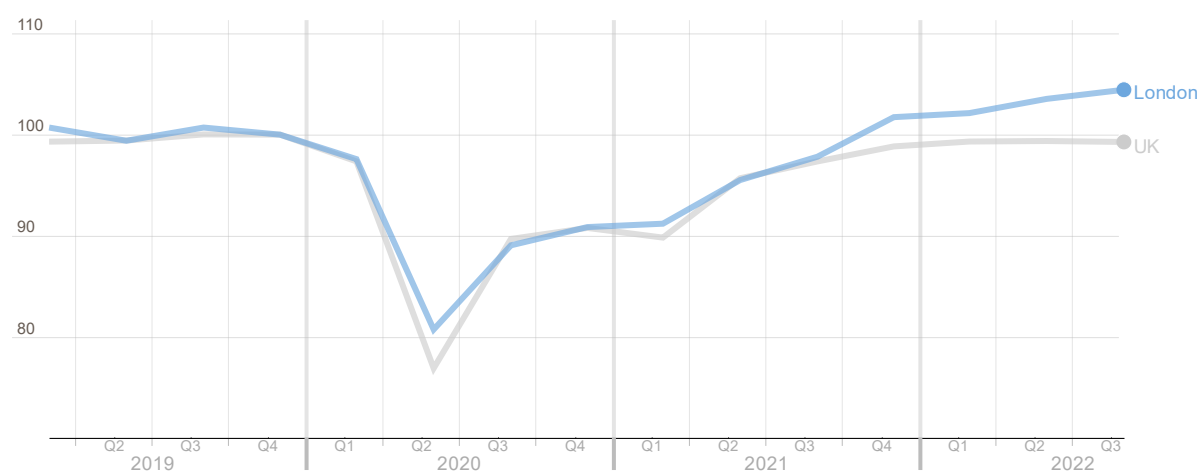
Source: GLA calculations, Office for National Statistics

After taking a harder hit from the pandemic than other UK regions, London's economy recovered strongly in 2021 and 2022. With output back to pre-pandemic levels by late 2021, London's growth has continued to outpace the national average in the latest data. The ONS estimates that London's GDP was up 6.8% year-on-year in Q3 2022. This compares to long-run average growth of 3%. After continued strength in 2022, when GLA Economics estimates that output grew over 7% in London, the cost-of-living crisis is set to dampen the outlook. While we expect that London will avoid a recession, we still see output growth averaging only 1.1% across 2023 and a moderate 1.8% in 2024. The strength of the labour market underlies the capital's resilience, and recent record growth leads us to forecast total workforce jobs will grow 3.4% in 2023. However, a sharp slowdown later this year is set to sap the momentum, and jobs will grow by just 0.4% in 2024 before normalising to 1.2% in 2025.

Figure 2: Weekly card spending on retail across London

Index, February 2020 = 100
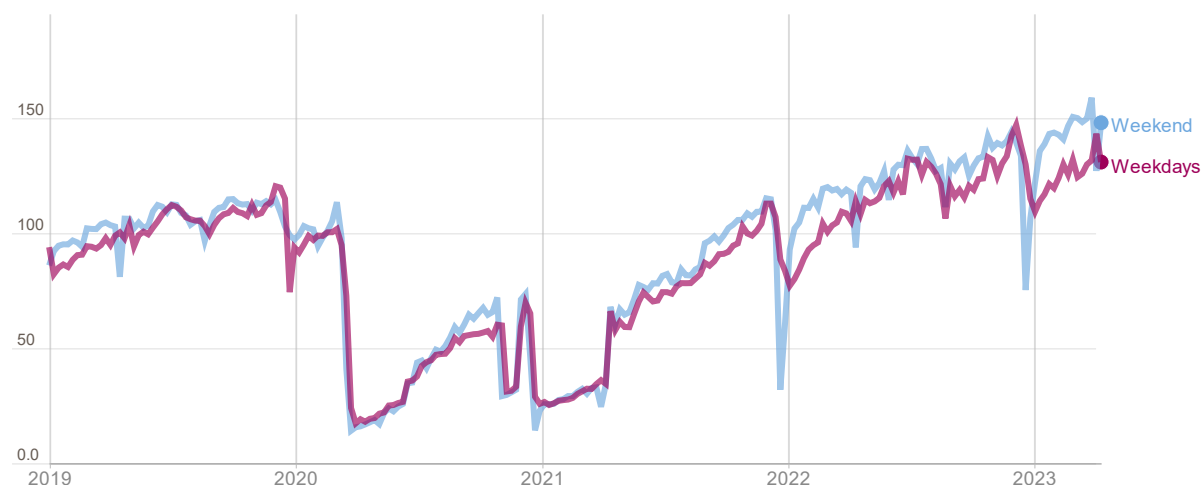

Source: GLA City Intelligence, Mastercard's Retail Location Index. Note: Data adjusted for inflation and a pandemic-induced shift from cash to card transactions.

Mastercard data shows retail spending in London slowing down since last December in inflation-adjusted terms. Despite rising inflation, retail spending grew firmly across the second half of 2022. After a pre-Christmas peak, spending fell off sharply, and weekday figures have not yet recovered. Weekend figures have rebounded more. Overall, card spending on retail has proven surprisingly resilient despite the damage to real incomes from inflation running at multi-decade highs. Separate data for card spending on clothing and eating out exhibit similar trends, while card spending on apparel has slowed more sharply in recent months.

Figure 3: Consumer confidence in London

Confidence index, 0 = neutral
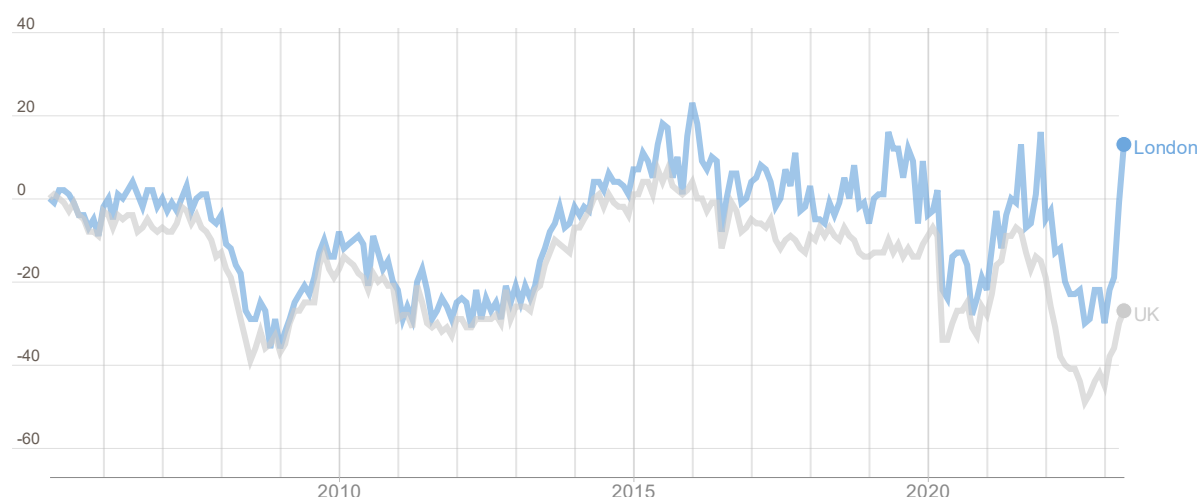
Source: GfK NOP

Consumer confidence in London improved sharply between March and May 2023, rising by the largest amount on record (from -19 to +13). With the latest data point now above the neutral mark of zero for the first time since December 2021, this

suggests that Londoners are becoming increasingly optimistic, despite inflation still at multi-decade highs.

However, consumer confidence across the wider UK remained weak in May (at -27). While sentiment has been steadily improving from the record low of -49 seen in September 2022, May's figure is still comparable to averages from the height of the pandemic. This suggests that households across the rest of the UK remain more pessimistic about the economic outlook than Londoners.

Figure 4: Foreign Direct Investment (FDI) into London

Number of projects (top series) and Capex £m (bottom series)
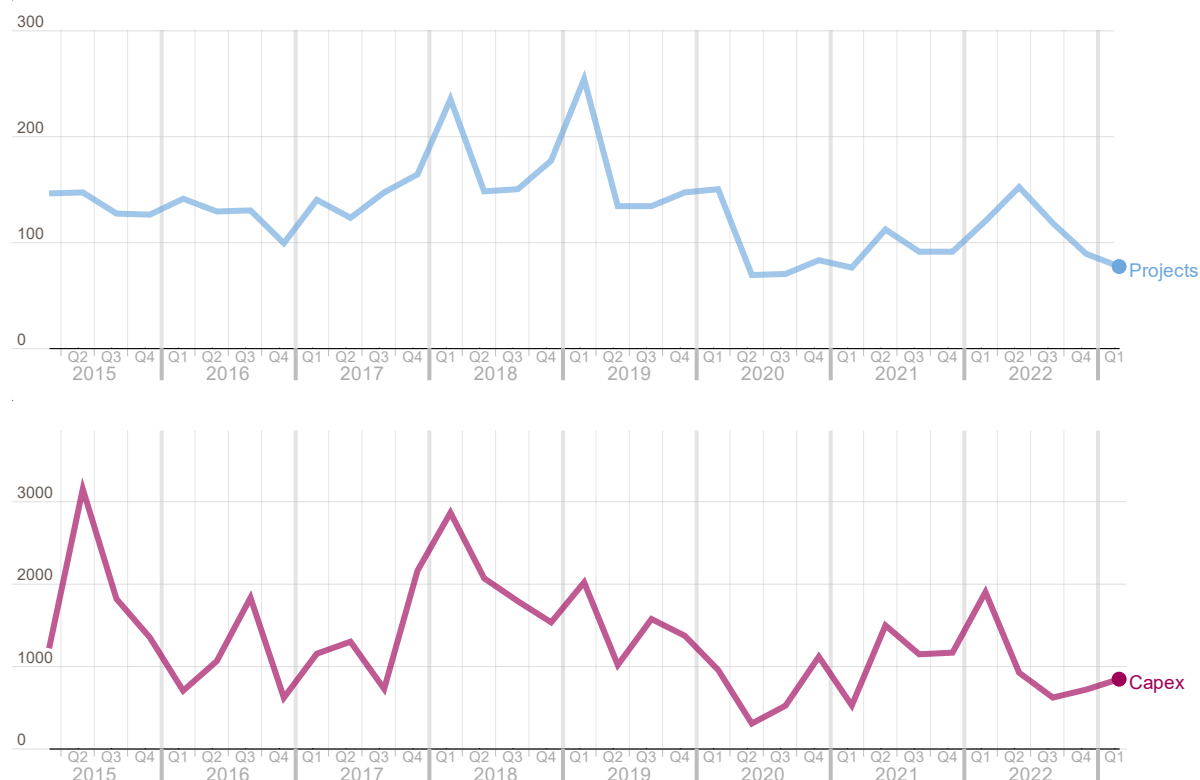
Source: fDi Markets, from the Financial Times Ltd 2021

In January to March 2023, there were 77 new FDI[13] projects in London, worth £0.8bn in capital expenditure according to estimates by fDi Markets. In the five years before the pandemic, the average was around 150 new FDI projects, worth £1.6bn per quarter.

The latest quarterly figures continue to show a drop-off from the post-pandemic mini-revival in FDI. Capital expenditure recovered to pre-pandemic levels at the start of 2022, but the combination of a weak growth outlook and rising interest rates is set to drag on levels of investment.

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[13] Data sourced from fDi markets live database and may be subject to revisions. Capex data are estimated values.

Figure 5: Business births and closures

Number of births and closures (four-quarter moving average)
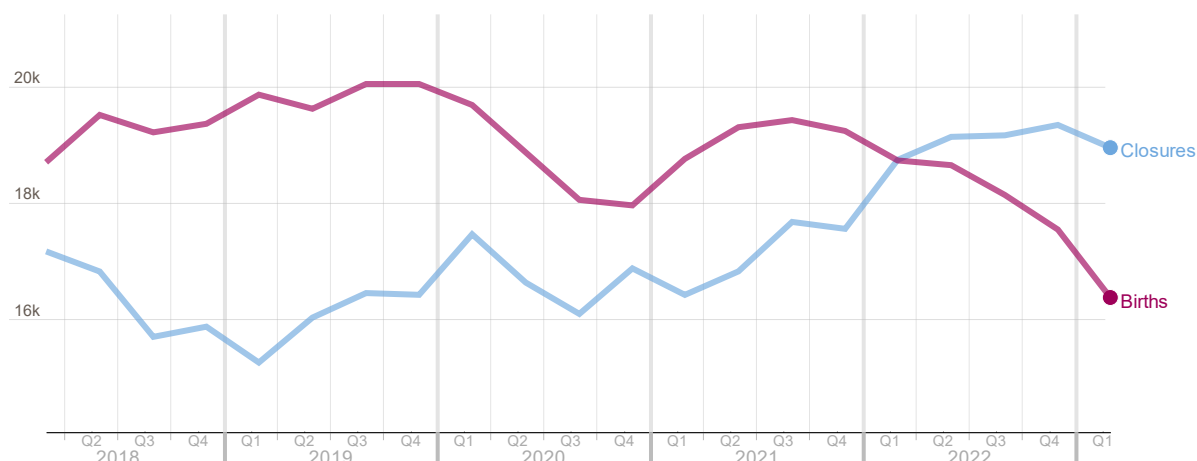
Source: ONS Business Demography. Note: experimental data.

In London's vibrant business sector, business births have tended to consistently exceed business closures[14]. Following a dip in both business births and closures at the outbreak of the pandemic in 2020, both began to rise, suggesting a high rate of business churn.

Since mid-2021, business births have declined, while business closures have continued to rise. Moreover, since Q1 2022, London has seen more business closures than births, on a four-quarter rolling basis, reversing the trend since the series started in 2017. In the year to Q1 2023, London has seen on average over 2,500 more businesses close than open per quarter. While we do not have data by sector for London, nationally, the sector with the largest net closure of businesses was Professional and technical services, though the sector where net closures rose the most in 2022 was Retail.

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[14] Quarterly business births and closures are experimental data from the ONS and subject to revisions. The data reflect businesses added or removed from the Interdepartmental Business Register (IDBR). A four-quarter moving average is provided in the chart to provide the trend in the time series.

Jobs

Figure 6: Total Workforce Jobs
Number of jobs (millions), latest data for December 2022
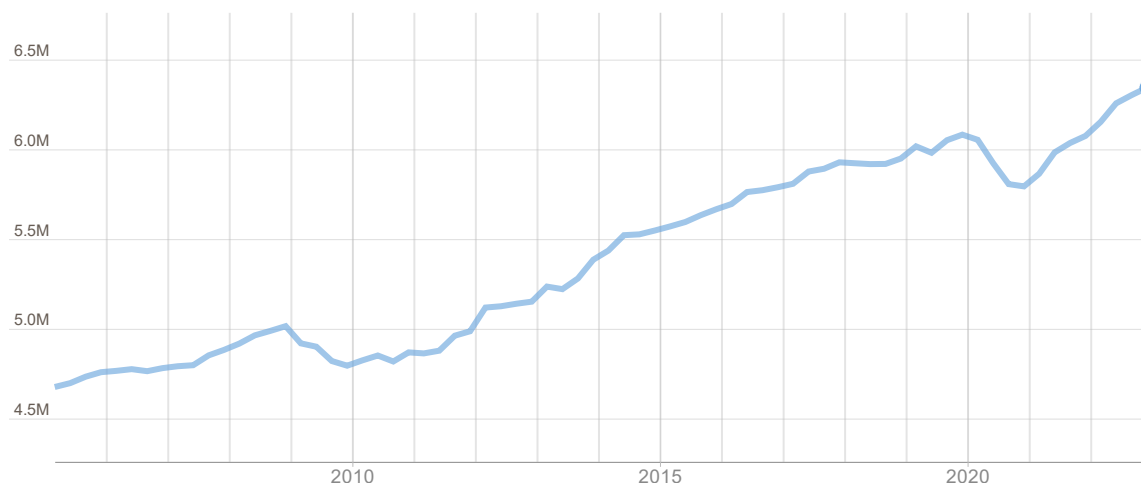
Source: ONS Workforce Jobs. Note: Sampling variability (95% confidence interval) +/- 170,000 jobs for year including June 2022 for London and +/- 204,000 jobs for the UK. This is a workplace-based measure.

The Workforce Jobs series provides quarterly estimates of the number of jobs and is the ONS' preferred metric for jobs by region of workplace and industry.

The estimated number of workforce jobs in London reached 6.34 million in December 2022. This latest estimate represents an increase of approximately 260,000 or 4.3% from December 2019 levels (the pre-pandemic peak in London), and roughly double the rate of growth recorded for the UK as a whole (2.1%)

The recovery in workforce jobs has been uneven across its two major components. From December 2019 to December 2022, the number of employee jobs increased by 393,000 (7.5%), while self-employment jobs decreased by 136,000 (16.5%). This is partly due to self-employed individuals shifting to employee roles during the pandemic, a change also prompted by off-payroll work (IR35) tax reforms.

Figure 7: Workforce Jobs profile by broad sector

Number of jobs in sections A-S (millions), latest data for December 2022
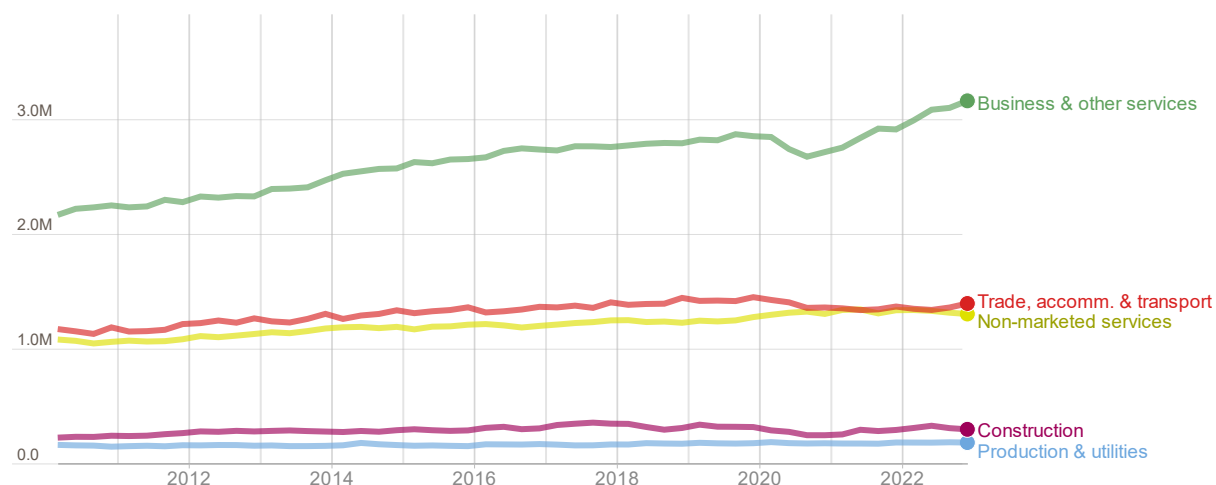
Source: GLA Economics analysis of ONS Workforce Jobs (via Nomis)

Over recent decades, the employment composition of London's economy has seen a shift towards services and away from primary and production activities.

By December 2022, there were 3.16 million jobs in business and other services, including professional and IT services, up from 2.25 million for the same period in 2010 (a 40% increase). The number of jobs in non-marketed services, such as health and education, increased from 1.06 million to 1.30 million over the same period (an increase of 23%).

There is also variation in how industry groups recovered from the pandemic, with a stronger recovery in business and other services, and a far weaker jobs recovery in the trade, accommodation and transport group (led by a sharp drop in workforce jobs in the transport & storage and hospitality sectors).

Figure 8: Employment rate

% aged 16-64, latest data for period Jan-Mar 2023
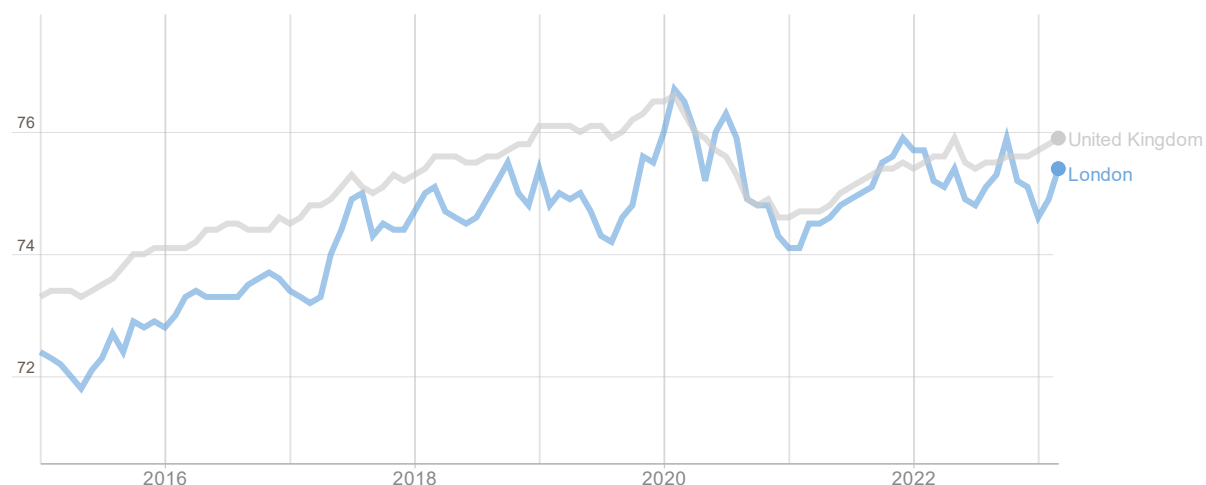
Source: ONS Labour Force Survey. Note: the margin of error for employment rate estimates is +/-1.5% for London and +/- 0.1% for the UK.

The employment rate is the proportion of people aged between 16 and 64 years who are in paid work or have a job that they are temporarily away from.

For the three months to March 2023, the employment rate in London was estimated by the ONS at 75.4%. This means that around three in four Londoners aged between 16 and 64 were in paid work during this time. However, this figure was up slightly on recent periods – by 0.3 percentage points (pp) on the previous quarter and by 0.2 percentage points from a year earlier.

The UK-wide employment rate was also slightly higher than in London. It was estimated at 75.9% for this period – up 0.31pp on the quarter and 0.3pp on the year.

Figure 9: Unemployment rate

% economically active population, latest data for period Jan -Mar 2023

Source: ONS Labour Force Survey. Note: the margin of error for unemployment rate estimates is +/-1.0% for London and +/- 0.3% for the UK.
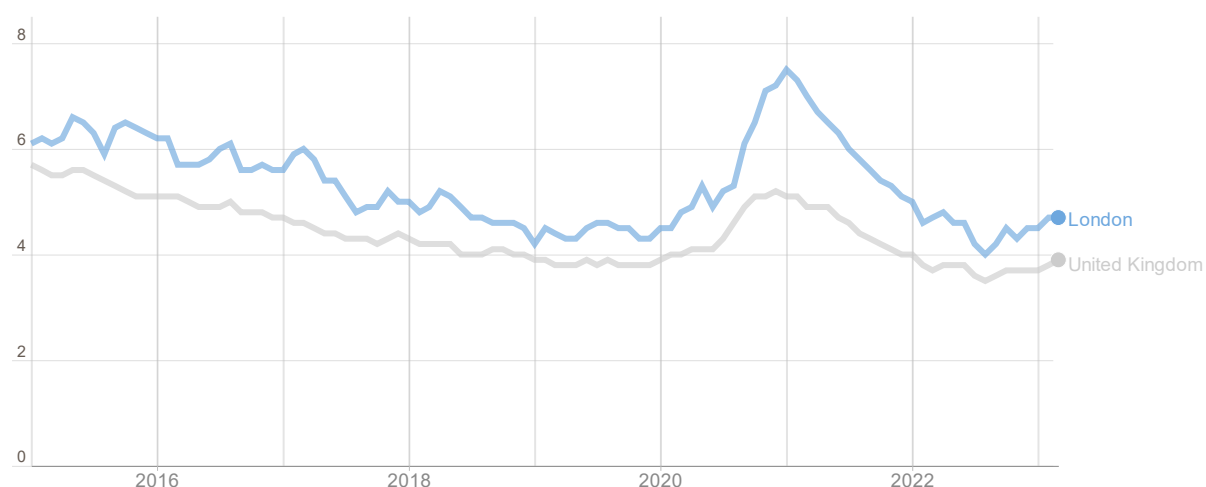
Unemployment measures people without a job who have been actively seeking work within the last four weeks and are available to start work within the next two weeks.

Having recovered from the pandemic, London's unemployment rate has remained relatively low by historical standards. However, recent estimates suggest a slight uptick. For the three months to March 2023, the ONS estimated London's unemployment rate at 4.7% – an increase of 0.2 percentage points (pp) on the previous quarter and from the same as a year earlier. This translates to around 240,000 out-of-work Londoners actively seeking employment during this period.

The UK unemployment rate was lower at 3.9%. This figure was up 0.2pp compared to the previous quarter and the previous year.

Figure 10: Economic inactivity
% aged 16-64, latest data for period Jan-Mar 2023
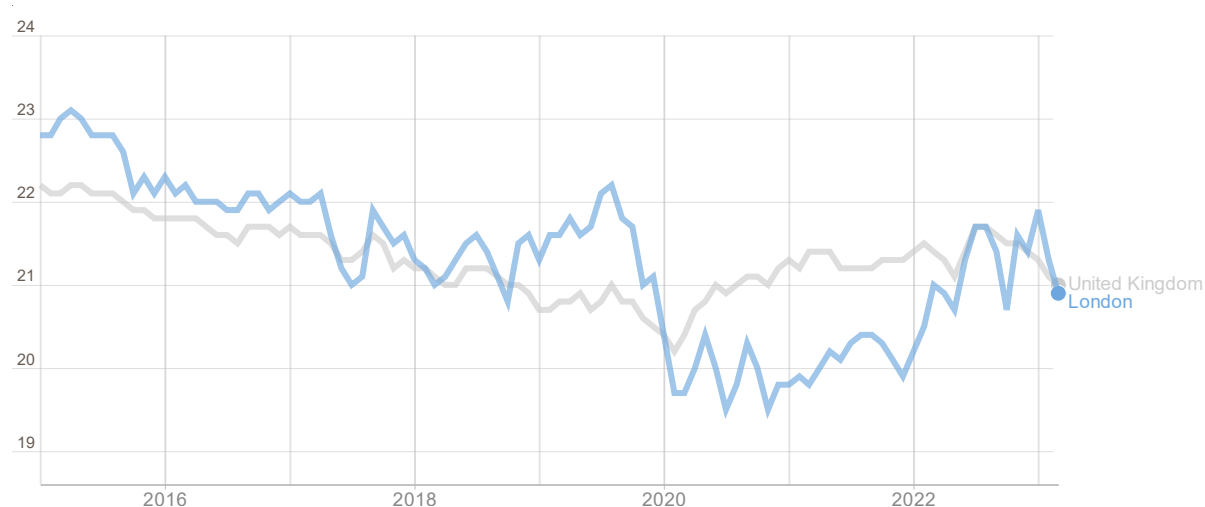
Source: ONS Labour Force Survey. Note: the London margin of error is not published for economic inactivity rates, the UK margin is +/- 0.3%.

The economic inactivity rate is the proportion of 16-to-64-year-olds not in work and either not looking for or unable to work. This group includes some students, people who are looking after family/home, and people who are too ill to work.

For the three months to March 2023, the rate of economic inactivity in London was estimated by the ONS at 20.9%. This was marginally lower than in the previous quarter (-0.5pp), and 0.1pp down on the previous year. This means there were around 1.31 million Londoners aged 16-64 who were not in employment and who were not actively looking for a job during this time.

At 21%, the UK-wide rate of economic inactivity was close to the London rate. This was down slightly on the previous quarter (-0.4pp) and on the previous year (-0.3pp).

Looking after family/home and being a student were the main reasons for economic inactivity in London in the 12 months to December 2022. A quarter (25%) of economically inactive Londoners said their inactivity was primarily related to caring responsibilities and 34% said it was because they were a student. Increases in inactivity over the past year have been larger for young Londoners (aged 16-24).

Figure 11: Employee jobs below the LLW & UKLW

% of employee jobs in London paid less than the London Living Wage (LLW) vs employee jobs in the UK (outside London) below the UK Living Wage (UKLW)
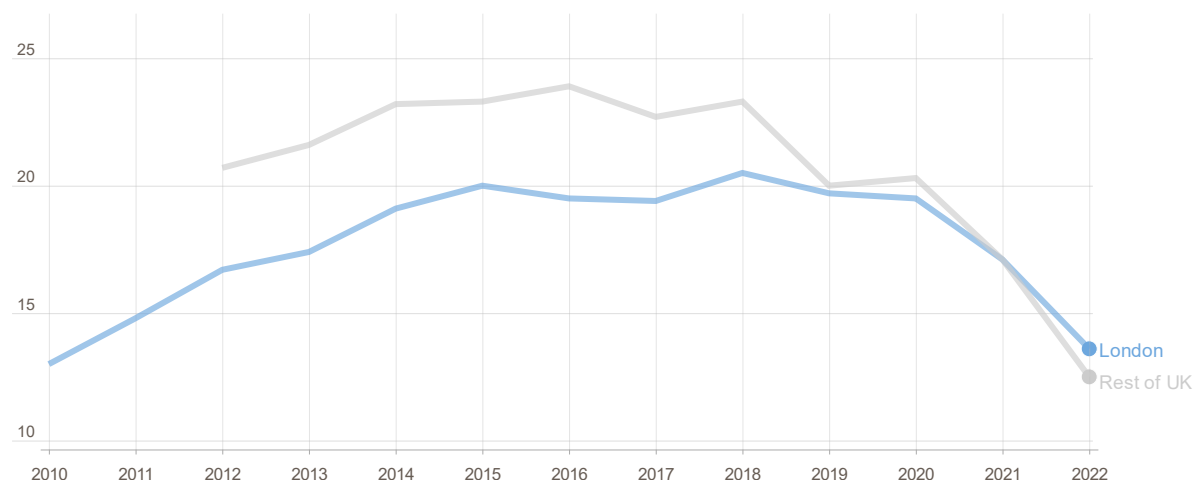
Source: Annual Survey of Hours and Earnings, Note: 2021 data provisional.
Chart: GLA Intelligence – see London Datastore.

The London and UK Living Wage rates are calculated annually based on actual living costs and overseen by the Living Wage Foundation. In previous years, Living Wage rates have tended to increase faster than inflation and general pay rises, although inflation has risen more sharply recently (i.e., since late 2021).

Around 14% of employee jobs in London were paid below the London Living Wage in April 2022, a higher share than the proportion of employee jobs paid below the UK Living Wage in the rest of the UK (13%). This is the first year that London's rate has been above the UK's rate since 2012. This reflects the fact that while low pay in London has gone down, it has not fallen as much as in the rest of the UK.

The proportion of employees across London earning below the London Living Wage increased between 2010 and 2015, and then remained more stable until 2020. Between 2020 and 2022, the number of low-paid jobs decreased sharply. This coincided with wider job losses that occurred during the coronavirus pandemic, which disproportionally affected sectors with lower levels of pay (such as hospitality).

Recent analysis by the Living Wage Foundation suggests that the number of low-paid jobs in the UK is likely to increase again in April 2023, as wages have not kept pace with inflation over recent months.

Figure 12: Workers in insecure employment

% of workers in insecure employment by place of residence
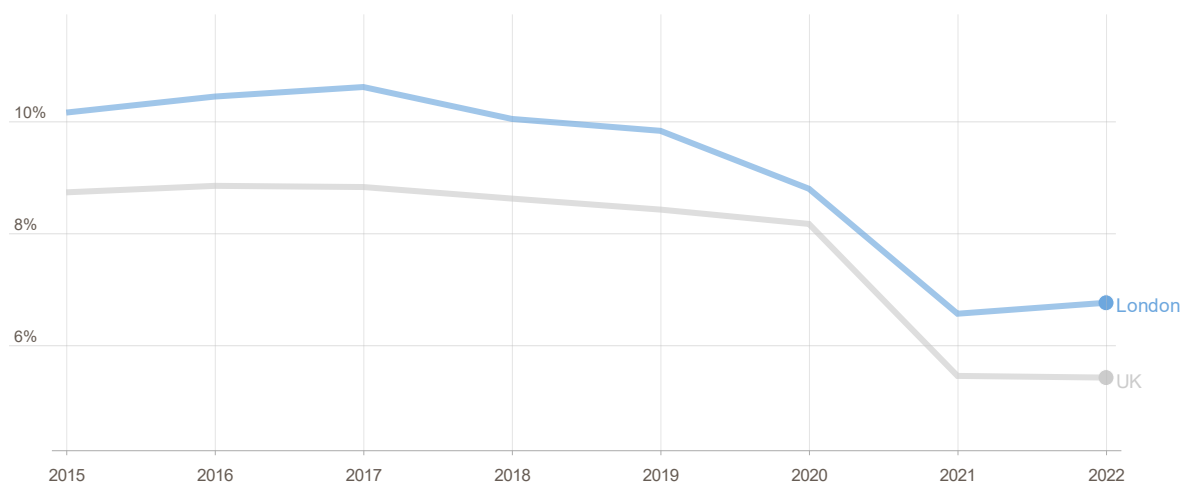
Source: ONS Annual Population Survey.
Chart: GLA Intelligence, see London Datastore.

The measure of insecure work used here covers those either employed in a job with a temporary contract, those working through an employment agency, or those who are self-employed in occupations generally considered insecure (such as caring, leisure or other service occupations, process plant and machine operatives or in elementary occupations).

The share of London-resident workers in insecure employment rose to 6.8% in 2022, a slight uptick from 6.6% in 2021 after falling rapidly from a peak of 10.6% in 2017.

However, the London share remains higher than that for the UK overall (5.4%). The low level of insecure employment in 2021 and 2022 is likely to reflect, in part, the negative impacts of the pandemic on low-paid sectors, including hospitality, as well as lower levels of self-employment jobs compared to employee jobs.

Figure 13: Employment rate gaps

Percentage points difference, latest data for period Jan 2022-Dec 2022
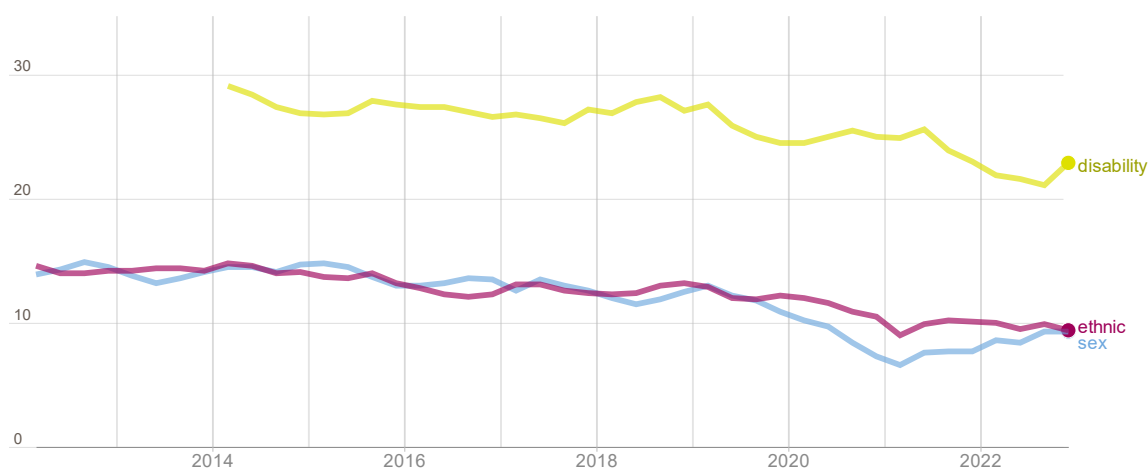
Source: ONS Annual Population Survey.

The employment rate gaps here show the percentage point difference in the employment rate for Londoners aged 16-64 in one group and that for another comparative group.

The latest gap between male and female Londoners is 9.4pp. This is above the national average (6.6pp) and has been rising since falling to a near-decade low in 2021.

The latest gap between all White Londoners and Londoners from all other ethnic backgrounds combined is 9.4pp. This is 2pp higher than the national average.

The latest gap between Londoners with disabilities and Londoners without disabilities is 22.9pp. This is below the national average (25.8pp) but has risen since falling to a near-decade low in 2021.

Skills

Figure 14: Population with no/low qualifications[15]

% aged 16-64, latest data for period Jan 2021-Dec 2021

Source: ONS Annual Population Survey.
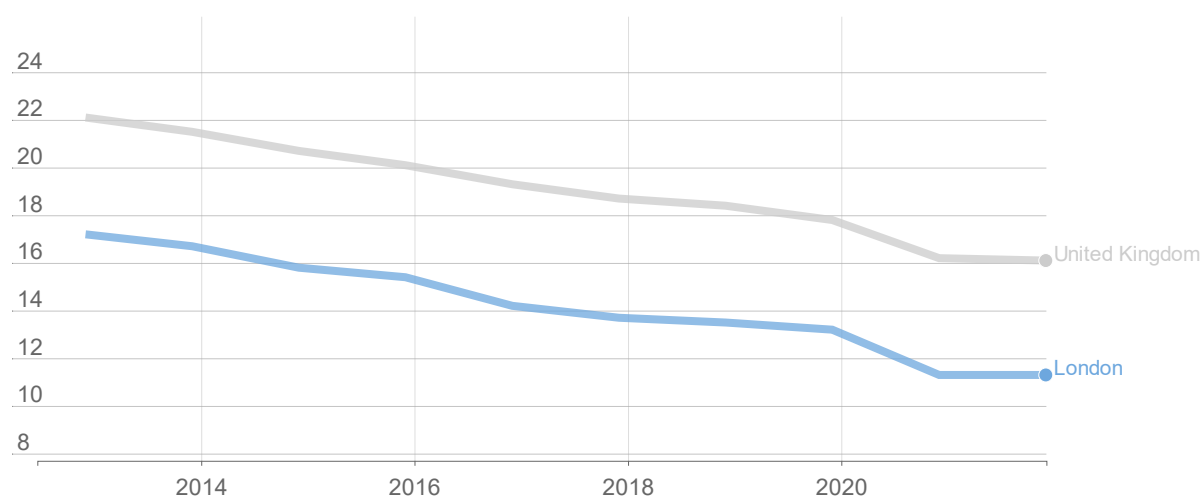*Chart: GLA Intelligence – see London Datastore.*

'No or low qualifications' includes people with no qualification at Level 2 or higher, equivalent to a GCSE 'pass' (grade A*-C or new grade 9-4).

Just over one in ten (11%) London residents aged 16-64 had no or low qualifications in 2021, decreasing steadily from around 17% in 2012.

The gap with the national figure has remained stable. The UK population with no or low qualifications has remained 4-5pp higher than that for London over time.

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[15] ONS has temporarily suspended qualification estimates for the Jan 2022–Dec 2022 survey period while datasets are updated to reflect changes to the qualifications framework. Here we present estimates using data to Dec 2021 for the share with no or low qualifications. When 2022 figures are published, we will also update estimates on the London Datastore of shares of Londoners with each NVQ qualification level.

Figure 15: Young people not in Education, Employment or Training (NEET)

% aged 18-24, latest data for period Oct 2022-Dec 2022, not seasonally adjusted
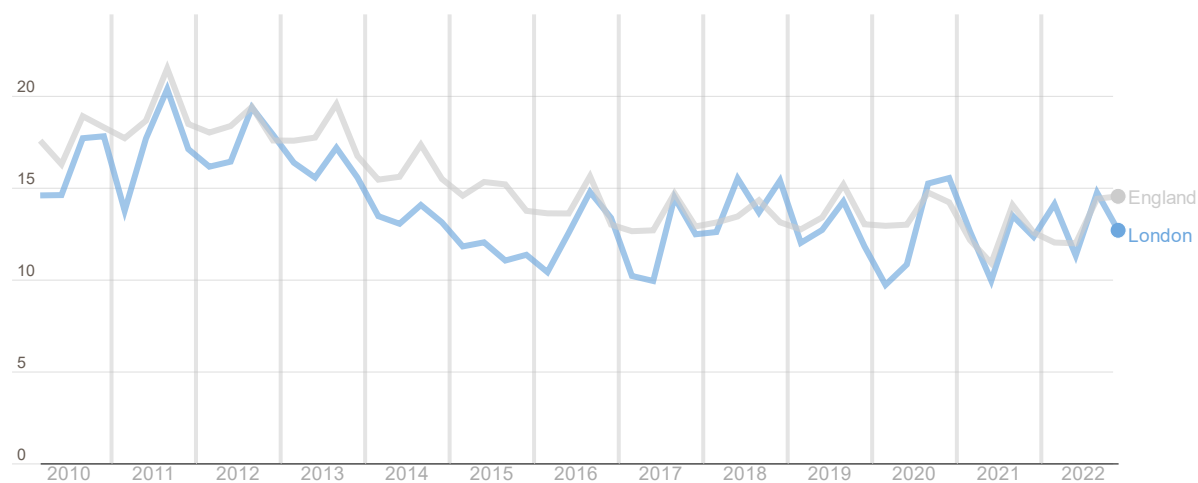
Source: Department for Education.
Chart: City Intelligence – see London Datastore.

In 2022, the proportion of young Londoners that were NEET was similar to the proportion for that in England as a whole, at about 13% on average across the four quarters.

The proportion of young adults that are NEET in London fell between 2012 and 2015, and then fluctuated between around 10% and 15% in the later years.

6: COMMUNITIES

This chapter sets out trends in a range of measures related to the strength of communities in London. The measures cover civic participation, local communities and high streets. The data in this section provide useful context for two of the GLA's recovery missions, Building Strong Communities and High Streets for All.

The majority of measures covered in this section are reported annually, though there are some that are reported more frequently.

Much of the data is drawn from the Department for Digital, Culture, Media & Sport's (DCMS) Community Life Survey. This is a key source for understanding more about community engagement, volunteering and social cohesion throughout England. In previous years, the GLA has published summaries of this survey, providing a comparison between London and the rest of England. In 2022, the GLA also published the headline findings from the Survey of Londoners 2021-22, which has data relating to many of these issues.

Underlying many of the measures in this section, there is a clear pattern that Londoners living in the most deprived areas have poorer outcomes compared with those living in the least deprived areas, e.g. neighbourhood belonging, neighbourhood trust, talking to neighbours often, and social isolation.

Civic participation

Figure 1: Formal volunteering
Proportion who formally volunteered at least once in the last year (%)
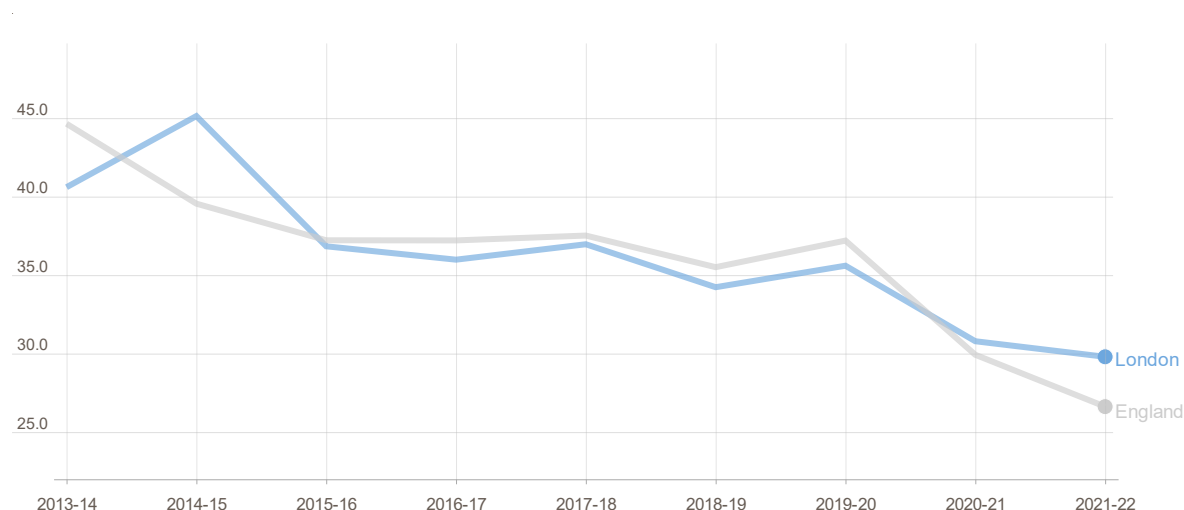
Source: DCMS, Community Life Survey

Three in ten (30%) Londoners aged 16+ formally volunteered in 2021-22. Formal volunteering refers to giving unpaid help through clubs or organisations.

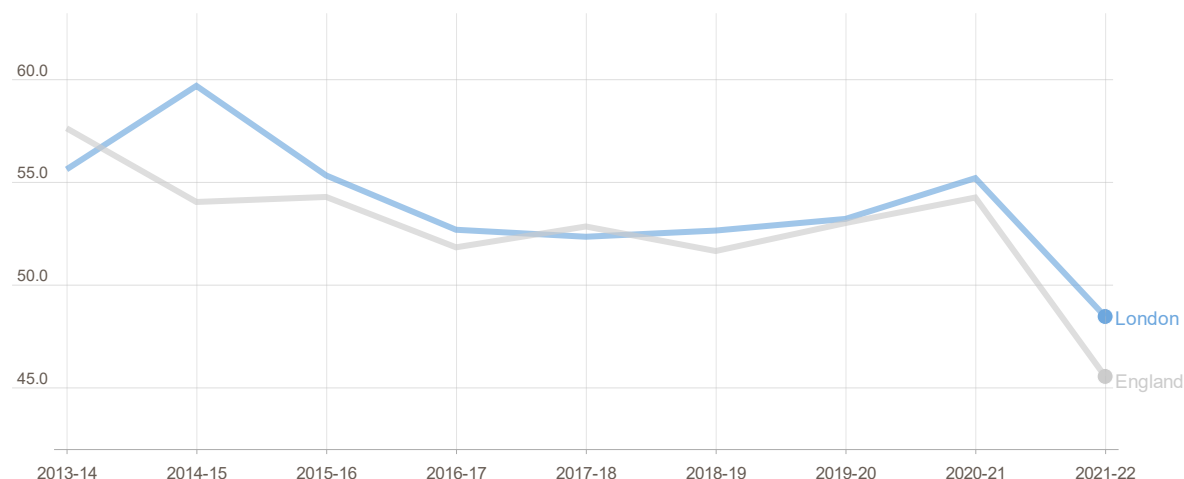Since 2013-14, the percentage of people reporting that they had formally volunteered in the last year decreased in London by 11 percentage points, a pattern mirrored across England.

Formal volunteering rates in London did not decrease significantly in the last year, whereas across England the rate fell significantly. Formal volunteering rates across England in 2021-22 were now 18 percentage points lower than in 2013-14.

Figure 2: Informal volunteering

Proportion who informally volunteered at least once in the last year (%)

Source: DCMS, Community Life Survey

Around half (48%) of Londoners informally volunteered in 2021-22. Informal volunteering refers to giving unpaid help to individuals who are not a relative.

Since 2013-14, the percentage of people in London reporting that they had informally volunteered in the last year has not changed much year to year. However, in the last year, between 2020-21 and 2021-22, informal volunteering rates decreased significantly in London (from 55% to 48%). A similar decrease was seen across England (from 54% to 46%).

Informal volunteering rates in London in 2021-22 were now seven percentage points lower than in 2013-14. Across England, they declined by 12 percentage points.

Figure 3: Social action

Proportion who were personally involved in social action in the last year (%)
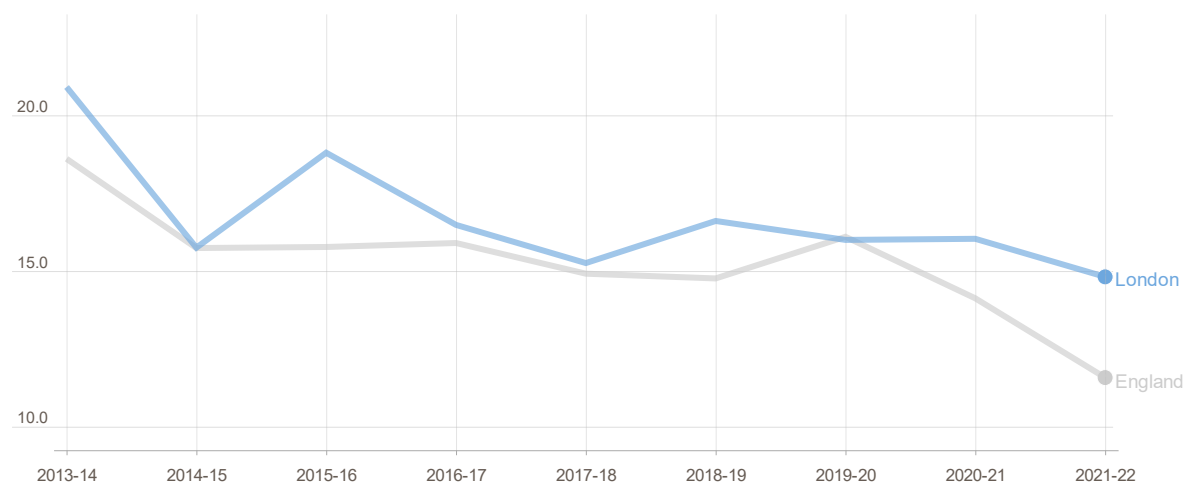
Source: DCMS, Community Life Survey

In 2021-22, 15% of Londoners were involved in social action. Social action is about being involved with issues affecting the local area, for example, setting up or stopping the closure of a service/amenity, running a local service on a voluntary basis, or helping to organise a street party or community event.
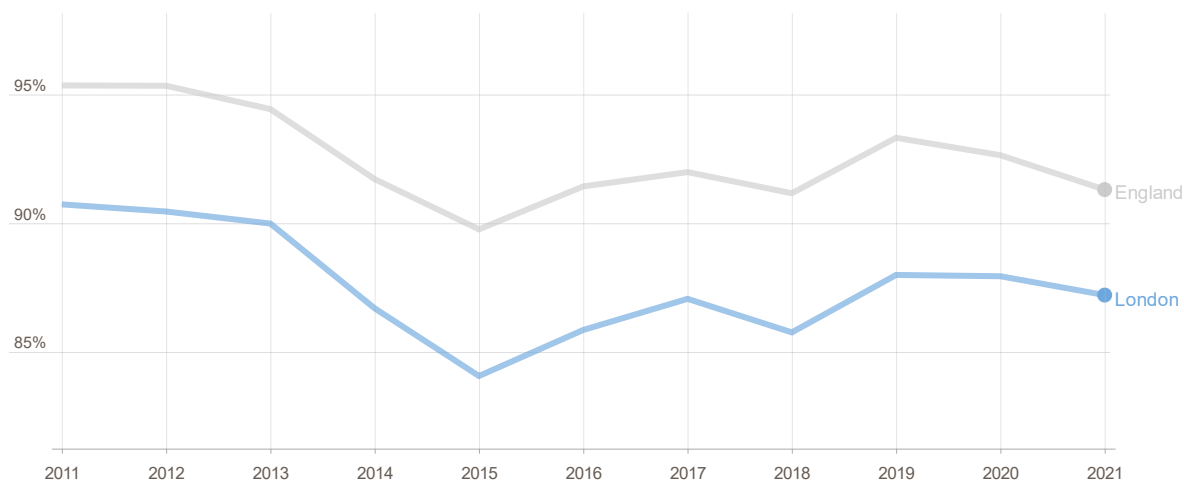
Since 2013-14, the percentage of people reporting that they were involved in social action decreased in London by six percentage points, a pattern mirrored across England.

Older Londoners (aged 50 and over) were more likely to have been involved in social action in 2021-22 (18%) compared with younger Londoners aged 25-34 (10%).

Democratic participation

Figure 4: Voter registration
Proportion of eligible adults aged 18 and over who are registered for local elections (%)

Voter registration is a key pillar of social integration. Not being registered to vote has other adverse impacts aside from not being able to vote in elections, such as not being able to be selected for jury service, and more difficulty in gaining a credit rating.

The voter registration rate in London has remained high since 2011. Back then, 91% of eligible adults were registered for local elections. However, by 2021, this was 87%. In other words, around one in eight Londoners (13%) were not registered to vote in 2021. The rate has been consistently lower in London than in England over the last 10 years, with London's rate being, on average, five percentage points lower.

It should be noted that the denominator used is all adults aged 18 and over in London. This is slightly inaccurate as not all adults in London are eligible to vote[16]. This means the local election registration rate is slightly higher than presented here.

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[16] https://commonslibrary.parliament.uk/research-briefings/cbp-8985/

Figure 5: Influencing decisions in local area

Proportion who feel able to influence decisions affecting their local area (%)
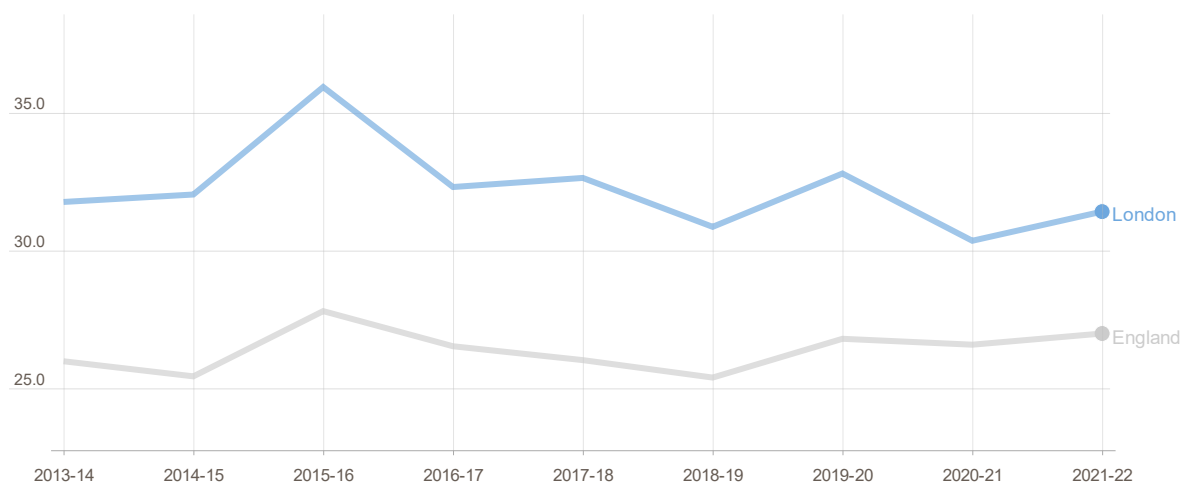
Source: DCMS, Community Life Survey

Around three in ten Londoners (31%) felt that they could personally influence decisions in their local area in 2021-22.

Since 2013-14, the percentage of people in London reporting that they could personally influence decisions in their local area has not changed much year to year, a pattern mirrored across England.

In 2021-22, Black Londoners (49%) were more likely than White Londoners (27%) to feel they could personally influence decisions in their local area.

The neighbourhood

Figure 6: Neighbourhood belonging

Proportion who feel they belong very or fairly strongly to their immediate neighbourhood (%)
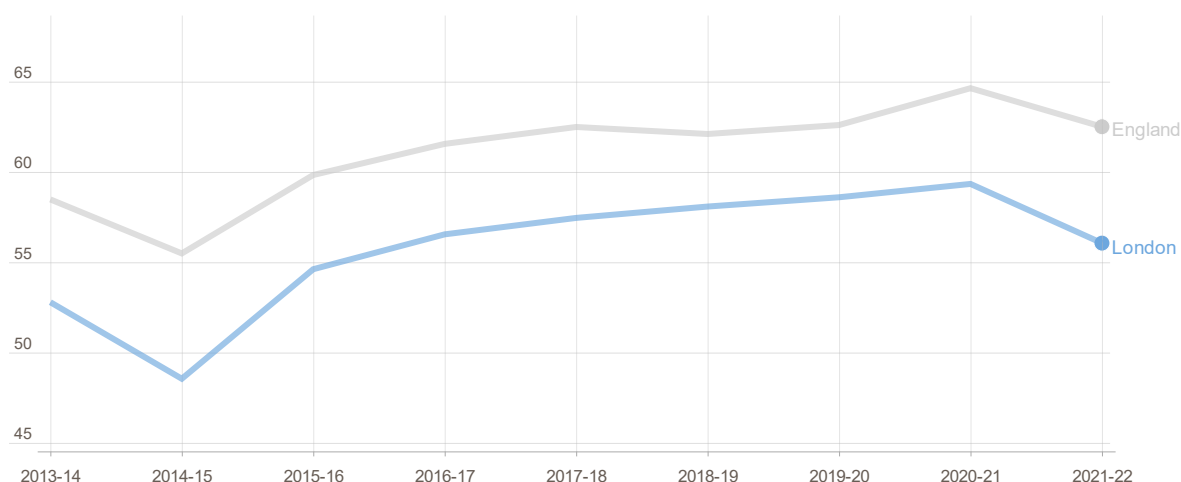
Source: DCMS, Community Life Survey

In 2021-22, 56% of Londoners felt that they belonged very or fairly strongly to their immediate neighbourhood. This has increased since 2014-15 when the proportion of Londoners who felt this way was at its lowest (49%). The decreases seen in London and England in the last year from 2020-21 were not statistically significant.

Neighbourhood belonging is lower in London compared with England overall and has been since 2013-14 (on average, by five percentage points). However, the Survey of Londoners 2021-22 showed Londoners had a higher rate of belonging to London as a whole, than for their local neighbourhood.

Figure 7: Neighbourhood trust

Proportion who agree that many of the people can be trusted in their local neighbourhood (%)
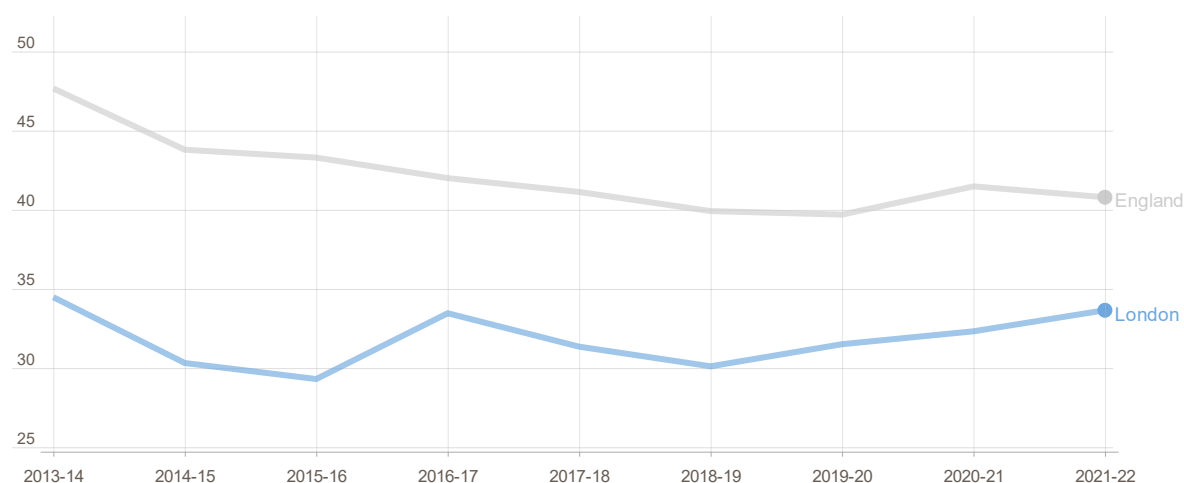
Source: DCMS, Community Life Survey

In 2021-22, around one third of Londoners (34%) agreed that many of the people in their local neighbourhood could be trusted. Since 2013-14, the percentage agreeing has not changed much.

Trust within local neighbourhoods increases with age. In 2021-22, 17% of Londoners aged 16-24 agreed that many of the people in their local neighbourhood could be trusted. This was 33% among Londoners aged 25-64 and 49% among Londoners aged 65 and over.

Trust was also higher among White Londoners (41%) compared with Londoners other than White (23%).

Social cohesion

Figure 8: Neighbourhood cohesion

Proportion of Londoners who agree that people from different backgrounds get on well in their local area (%)
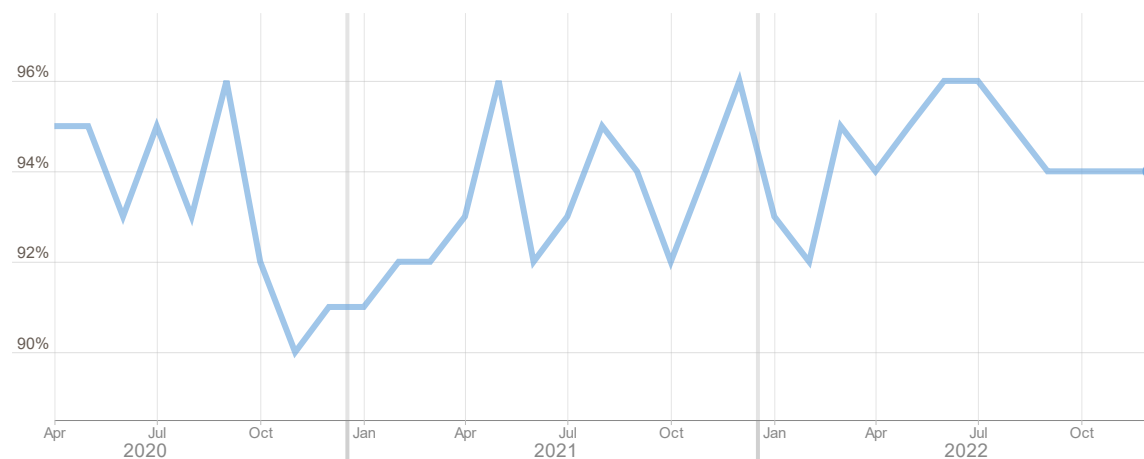
Source: MOPAC, [Public Attitude Survey (PAS)](#)

Neighbourhood cohesion, defined here as the proportion of Londoners who agree that their local area is a place where people from different backgrounds get on well together, has remained above 90% each month since around the start of the pandemic in April 2020. As of December 2022, 94% of Londoners agreed with the statement.

In 2008, neighbourhood cohesion was much lower than it is today, with agreement from around three quarters of Londoners (73%). There were annual increases up until 2013-14 when 95% of Londoners agreed with this statement. Every year since then, it has been above 90% and in the final year before fieldwork on its survey was disrupted by the pandemic (2019-20), it was 92%.

Figure 9: Recorded hate crime

Number of hate crime offences in London as recorded by the MPS

Source: Met Police, [Hate Crime Dashboard](#)

A hate crime is defined as 'any incident perceived by the victim or any other person to be racist, homophobic, transphobic, or due to a person's religion, belief, gender identity or disability'. In the pre-Covid period (January 2019 to February 2020), recorded hate crime was around 1,500 offences a month.

After the first national lockdown was imposed, recorded hate crime offences reached a peak of 2,500 offences in June 2020. It then fell to pre-pandemic levels by the end of the year, before rising to 2,400 offences in July 2021. Since then, hate crimes have fallen again and by December 2022, 1,500 offences were recorded in the month, similar to the number of monthly recorded hate crimes pre-pandemic.

Figure 10: Perception of hate crime

Proportion of Londoners who think hate crime is a major/minor problem in their area (%)
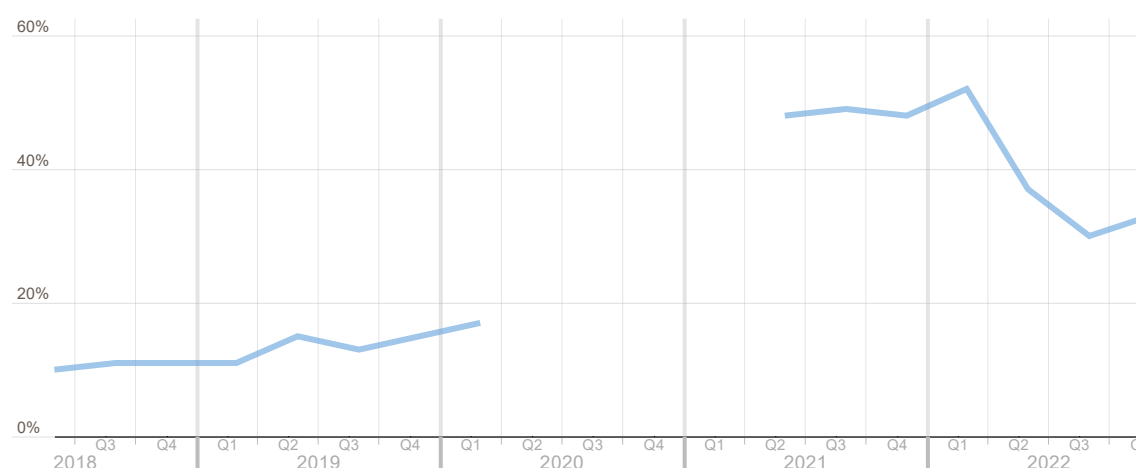
Source: MOPAC, [Public Attitude Survey (PAS)](#)

Before the pandemic, MOPAC had been tracking the extent to which residents had thought hate crime was a problem in their area through their Public Attitude Survey

(PAS). In each quarter of financial year 2018-19, around 10-11% of adults thought it to be a major or minor problem. In each quarter of financial year 2019-20, around 13-17% of adults considered it a major or minor problem.

The PAS was traditionally conducted as a face-to-face survey. However, when the pandemic hit, the survey switched to a telephone methodology (in March 2020). As a result, caution should be exercised when comparing data before and after this date. When the PAS started collecting data on this measure again in 2021-22, levels of concern were much higher than pre-pandemic (reaching a high of 52% by Q1 2022). The PAS began a phased return to face-to-face interviewing in financial year 2022-23. This provides some explanation as to why the rate of concern fell sharply in Q2 2022. By Q4 2022, a third of Londoners (33%) thought hate crime was a problem in their area.

Relationships

Figure 11: Talking to neighbours

Proportion who chat to their neighbours at least once a month (%)
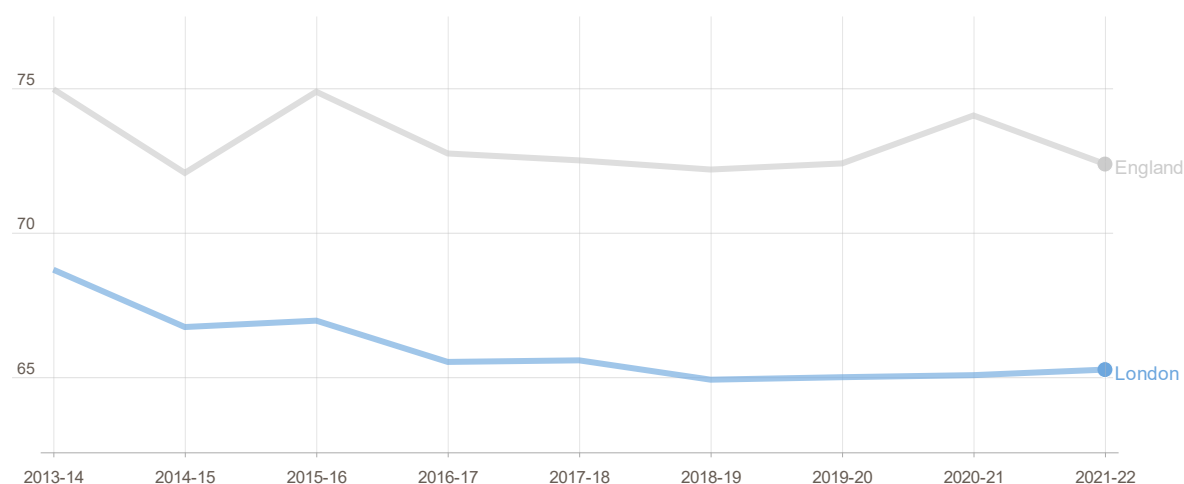
Source: DCMS, [Community Life Survey](#)

In 2021-22, around two thirds of Londoners (65%) reported chatting to their neighbours at least once a month. This is less than residents across England (72%).

Talking to neighbours regularly has been lower in London compared with England overall since 2013-14 (on average, by seven percentage points).

Talking to neighbours regularly was lower among younger Londoners aged 16-34 (50%) compared with older Londoners aged 35-49 (71%) and Londoners aged 50 and over (76%).

Londoners who own their accommodation were more likely to have chatted to their neighbours often compared with Londoners who were renters (73% and 58% respectively).

Figure 12: Social isolation

Proportion who agree that if they needed help there are people who would be there for them (%)
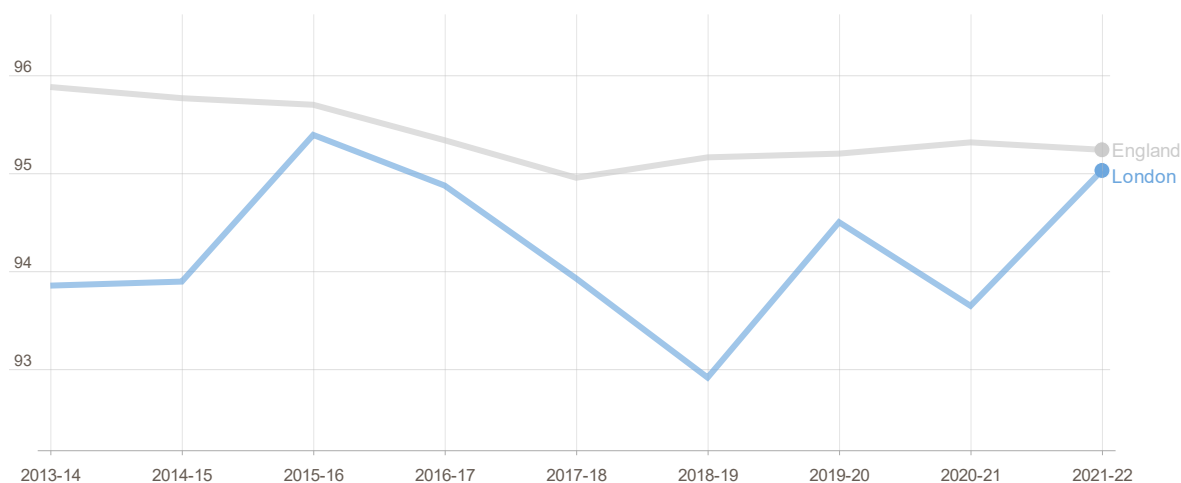
Source: DCMS, Community Life Survey

In 2021-22, the majority of Londoners (95%) did agree that there were people who would be there for them if they needed help.

Black Londoners (89%) were less likely than White Londoners (96%) to agree that there were people who would be there for them if they needed help.

Disabled Londoners (91%) were also less likely than non-disabled Londoners (96%) to agree that there were people who would be there for them if they needed help.

Social participation

Figure 13: Participation in formal culture and events

Proportion of Londoners who have participated in formal culture and events in the last month (%)

Source: Survey of Londoners 2018-19, Survey of Londoners 2021-22 and GLA/YouGov

The Culture Strategy for London outlines the GLA's aims in providing Londoners with access to culture on their doorsteps. In the Survey of Londoners formal culture and events wa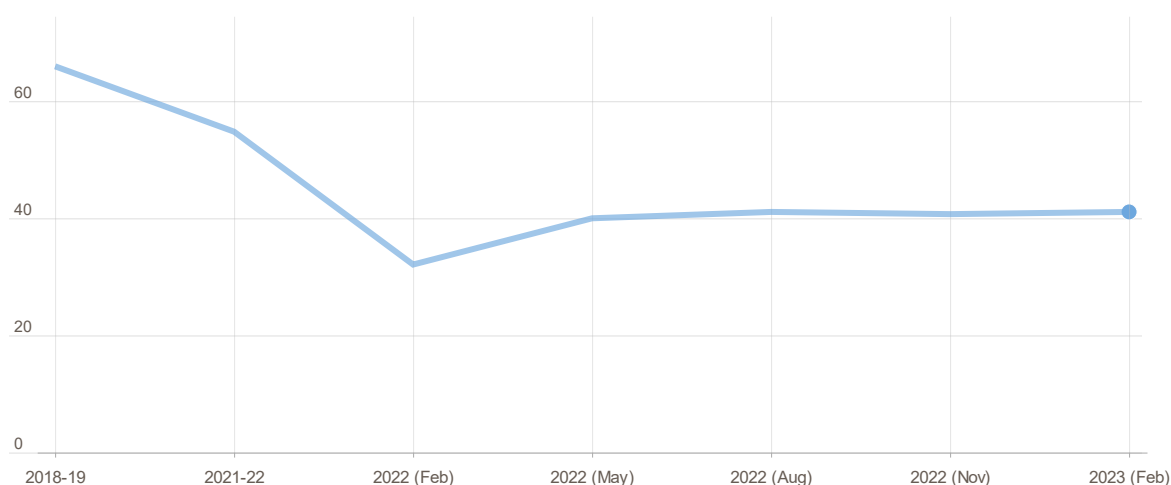s defined as going to the cinema, visiting museums/galleries, going to the theatre/music concerts or attending local community festivals and events.

In the first Survey of Londoners in 2018-19, around two thirds of Londoners aged 16+ (66%) had participated in formal culture and events in the last month, but this had declined to 55% by the time of the 2021-22 survey (fieldwork took place from November 2021 and extended into early February 2022). When polled in February 2022, 32% of Londoners aged 18+ had engaged in formal culture and events in the last month. This increased to 40% in May 2022 and remained at this higher level in February 2023 (41%), though this was still below the proportion captured a year or so earlier.

Figure 14: Participation in sport
Proportion of Londoners who have participated in sport in the last month (%)
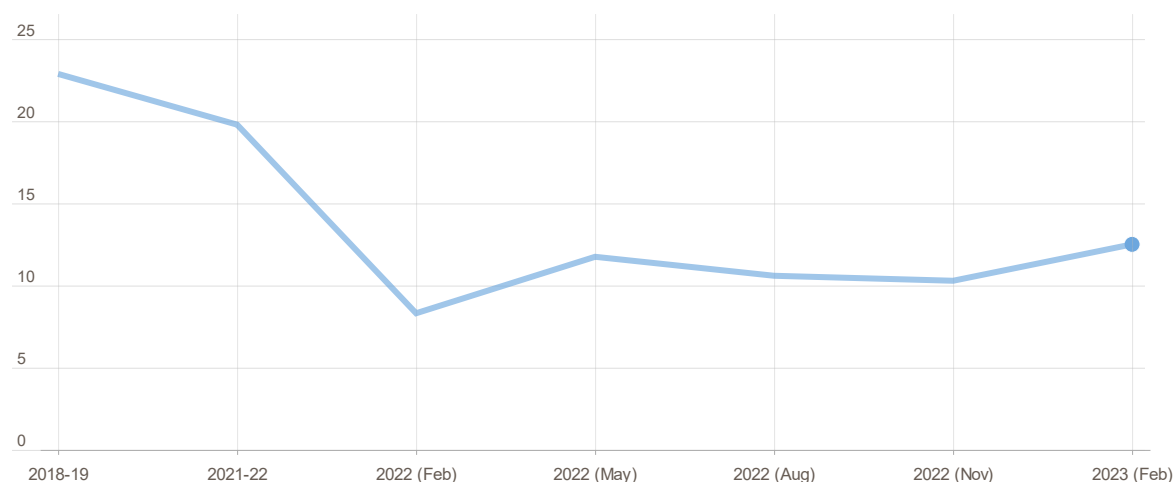
Source: Survey of Londoners 2018-19, Survey of Londoners 2021-22 and GLA/YouGov

The Survey of Londoners also captured participation in sport. In 2018-19, around a quarter of Londoners aged 16+ (23%) had played sport in the previous month, but this had declined to 20% by the time of the 2021-22 survey. When polled in February 2022, 8% of Londoners had played sport in the last month and this increased noticeably during Summer 2022 to 12% in May 2022, though it had decreased slightly to 10% by November 2022. When polled in February 2023, 15% of Londoners had played sport in the last month, still below the proportion captured in the Survey of Londoners a year or so earlier.

This decrease in culture and sports participation between the two Surveys of Londoners may be partly attributable to the Omicron variant, which led to precautionary measures in December 2021 and January 2022, thus coinciding with the second Survey of Londoners' fieldwork period. The lower proportions derived from the polling results may be due to mode effects, as the Survey of Londoners was a self-completion online and paper mixed method survey, whereas the polling was conducted through an online panel.

CITY INTELLIGENCE

Local institutions and amenities

Figure 15: Trust in institutions

Proportion of Londoners who trust various services, using a five-point scale where 1 is 'Very trustworthy' and 5 is 'Very untrustworthy' (%); scores '1' & '2' have been combined to create a 'trustworthy' variable
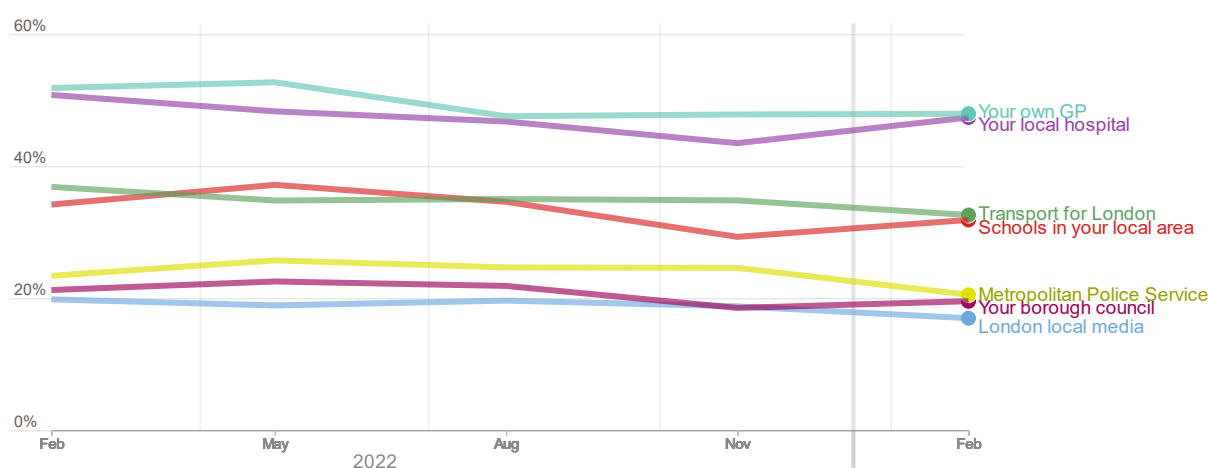
Source: GLA/YouGov

When first polled in February 2022, Londoners were asked to rate the trustworthiness of various services on a five-point scale. The trust scores '1' and '2' were combined to create a 'trustworthy' variable, as were '4' and '5' for 'untrustworthy'.

Londoners were most trusting of medical institutions; their own GP (52%) and their local hospital (51%) were most likely to be scored as trustworthy. However, trust in these institutions had declined to 48% and 47% respectively by February 2023. Trust in local schools had returned to a similar level seen in February 2022 (34%) a year later in February 2023, with 32% deeming them as trustworthy.

In February 2022, trust was lowest for London media, borough councils and the Metropolitan Police Service. This remained the case by February 2023, with trustworthiness standing at 17%, 20% and 21% respectively.

The public perception of trust in the Metropolitan Police Service (MPS) is also routinely measured by the Public Attitude Survey (PAS). The results of this survey have shown a gradual downward trend over the last two years; the latest data for Q3 2022-23 has the proportion of respondents agreeing that the MPS is an organisation that they can trust at 72%. This compares to 80% in Q3 2020-21. As well as methodological differences, the question used in the PAS is very different to the question in the GLA's polling, so the two measures cannot be compared directly.

Figure 16: Thriving local high streets

Proportion of 2019 footfall in local high streets in the CAZ and outside of the CAZ, using weekend visitors at 12pm (%)
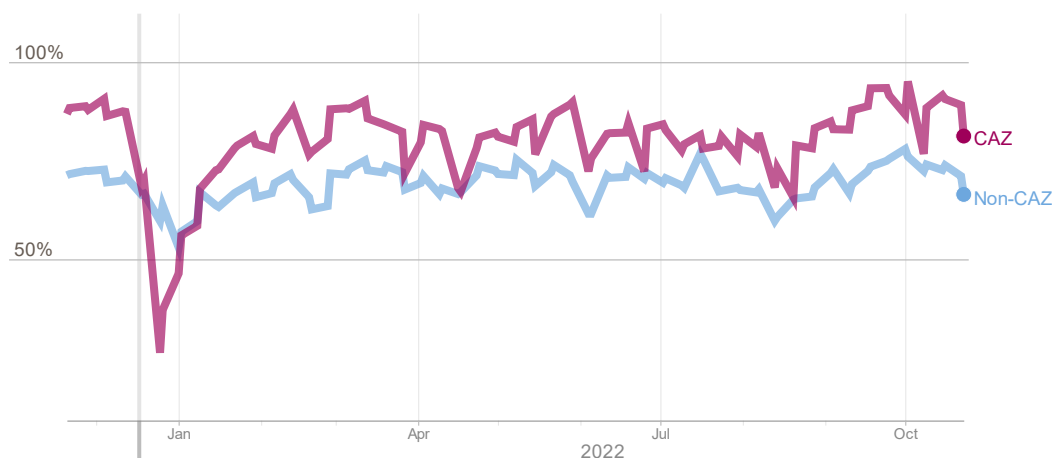
Source: Anonymised and Aggregated data by O2

Creating thriving, inclusive and resilient high streets and town centres, within easy reach of all Londoners, is one of the key missions of the London Partnership Board (formerly the London Recovery Board). The chart above looks specifically at visitor footfall on high streets in London using mobile phone data from O2. The data is based on 30% of the UK's population (O2 customers) multiplied up to the full population.

Footfall (as defined above) has consistently been higher in the CAZ but by October 2022, had still not recovered to the level seen in 2019. Footfall decreased sharply over Christmas 2021, and more so in the CAZ, probably due to the Omicron variant, but began to pick up very soon after. Footfall increased in the second half of 2022, from July to October, averaging 83% of pre-Covid-19 levels in the CAZ compared to 70% outside the CAZ.

Nevertheless, more recent data show that footfall and spending activity in the CAZ have recovered considerably over the past year. Current Tube demand at weekends in the CAZ is often higher than pre-pandemic levels[17]. Moreover, data from BT shows that the average number of daytime CAZ visitors increased by at least 10% year-on-year[18], and Mastercard's spending data reveals that weekend spend in the CAZ is back to levels last seen in April 2019[19]. This increase in activity within the CAZ is welcome news to the sizeable number of businesses based in the Zone.

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[17] TfL Board papers:
https://board.tfl.gov.uk/documents/s20149/Delivering%20the%20Mayors%20Tranport%20Strategy%20202223.pdf
[18] Aggregated and anonymised data by BT
[19] Aggregated and anonymised data by Mastercard

7: CRIME & SAFETY

This chapter explores a range of indicators related to crime and safety, concentrating on crime metrics, as well as measures of both victim satisfaction with the police and public sentiment.

Most of the indicators featured within this chapter are updated monthly, with only the indicators related to overall victim satisfaction and feelings of safety being updated less frequently (quarterly).

The indicators are all presented at the London level and are primarily derived from publicly available dashboards, including the Public Voice MOPAC (Mayor's Office for Policing And Crime) Dashboard, the NFIB (National Fraud Intelligence Bureau) Fraud and Cyber Crime Dashboard, and the MPS (Metropolitan Police Service) Crime Data Dashboard.

Where feasible, the data for the individual indicators has been provided from the latest data point back to 2018. This enables the trends and patterns exhibited during the pandemic and recovery phase, to be looked at in the context of the pre-pandemic trends.

Total Crime

Figure 1: Total Notifiable Offences (TNOs)

Number of offences recorded by the MPS (thousands)

Source: MOPAC (Mayor's Office for Policing And Crime) Crime Dashboard. The above chart does not include any offence that has been flagged as being a Domestic Abuse (DA) offence.

The pandemic and associated lockdowns impacted heavily upon crime and disorder levels within London. As shown in the above chart, profound reductions were shown

in the level of total crime[20] recorded during these periods, although differential impacts were observed across different crime types.

This disparity has continued into the recovery period, with some crime types surpassing their pre-pandemic monthly offending levels, whilst others remained significantly below.

Violence

Figure 2: Non-Domestic Violence with Injury Offences
Number of offences recorded by the MPS
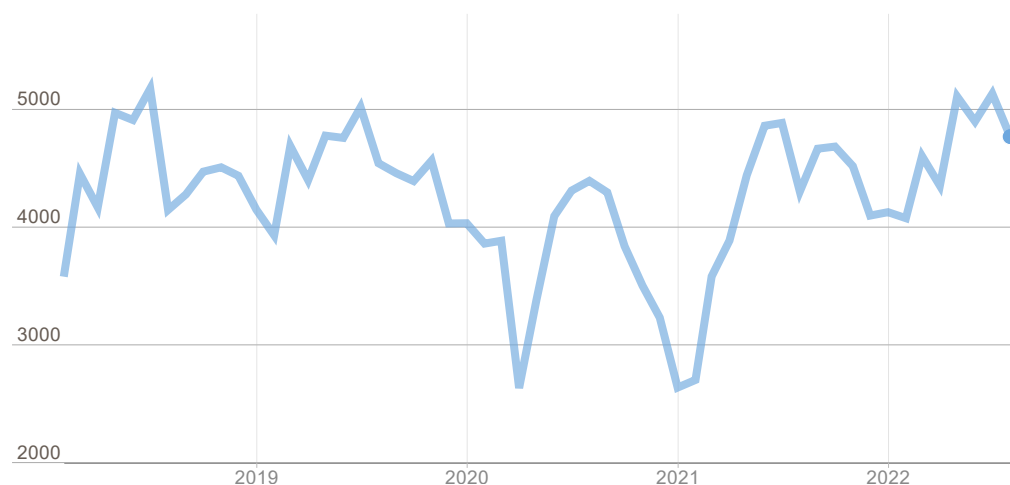
Source: MOPAC (Mayor's Office for Policing And Crime) Crime Dashboard. The above chart does not include any offence that has been flagged as being a Domestic Abuse (DA) offence.

The onset of the pandemic resulted in significant reductions in the level of violence with injury offending recorded by the police, with April 2020 recording 32% fewer offences than the month before.

In the following months, notable variation was observed in the volumes of offending, with the active lockdown periods linked to steep reductions in offending and the conclusion of the lockdown periods linked to steep increases in offending.

During 2021, an upward trend was observed, with offending rates back to their pre-pandemic levels. This was maintained throughout 2022, with the most recent data for August 2022 showing a 5% increase on August 2019.

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[20] As measured by Total Notifiable Offences (TNOs)

Figure 3: Domestic Abuse Offences

Number of offences recorded by the MPS (thousands)
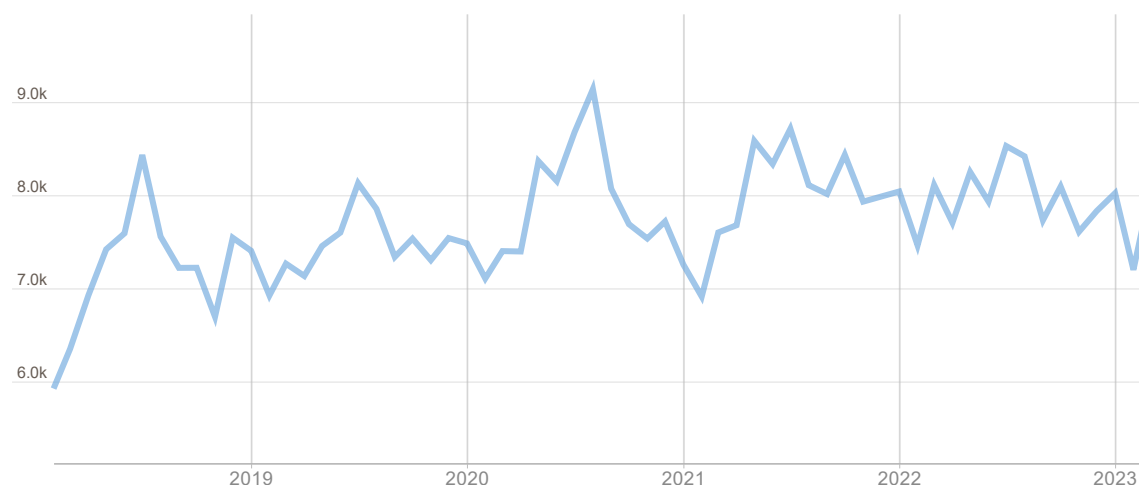
Source: MOPAC Domestic and Sexual Offences Dashboard. The data in the chart refers to Domestic Abuse Offences, not Domestic Abuse Incidents. Please note that there is no specific offence of Domestic Abuse. Domestic abuse-related offences are defined as any incidence of threatening behaviour, violence, or abuse (psychological, physical, sexual, financial, or emotional) between adults, aged 16 years and over, who are or have been intimate partners or family members, regardless of gender or sexuality. Further note that increasing trends in Domestic Abuse Offences may reflect improvements in reporting over recent years.

From 2018 to 2021, there was a general upward trend in the level of Domestic Abuse offences recorded by the police, but this levelled off in 2022. Total offences for the year to March 2023 were 2% lower than in the preceding year (to March 2022).

Domestic Abuse Offences continue to disproportionately affect certain victim groups, with three-quarters of the victims in 2021 being female (74%).

While Domestic Abuse Offences have increased over recent years, the charging rate in England and Wales for Domestic Abuse has fallen across the last three years (70% in 2020/21). The number of CPS (Crown Prosecution Service) prosecutions has also fallen across the last six consecutive years (with 53,207 prosecutions in 2021/22).

Figure 4: Sexual Offences
Number of offences recorded by the MPS
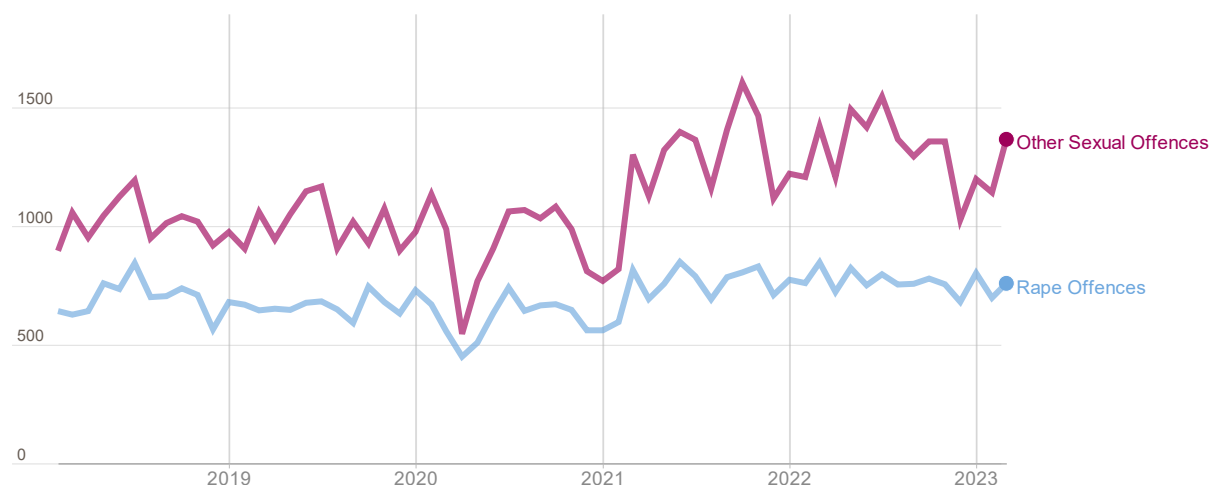
Source: MOPAC Domestic and Sexual Offences Dashboard. The chart distinguishes between Rape Offences and Other Sexual Offences, which when combined are referred collectively as "Sexual Offences."

Levels of Rape and Other Sexual offences were fairly stable in 2018 and 2019, then dipped during the first and second national lockdowns in 2020 and early 2021 before increasing from March 2021.

Rape offences have remained at around 700 to 800 incidents since 2022, while the number of Other Sexual offences has remained at relatively high levels, with the 1,600 incidents recorded in October 2021 representing the highest monthly figure on record.

Figure 5: Non-Domestic Knife Crime with Injury Offences – Victim U25
Number of offences recorded by the MPS

*Source: MOPAC Weapon-Enabled Crime Dashboard. The above data refers only to offences where a victim is under the age of 25 and has been injured in a Non-Domestic Abuse knife incident. Please note, however, that the age qualifier only refers to the victims, meaning that the offender(s) may be aged over 25.*

There was a downward trend in the recorded number of non-domestic knife crime victims under the age of 25 between 2018 and early 2020, followed by a very pronounced drop in offending in April 2020 at the start of the pandemic before a further reduction in January 2021.

Numbers offending were stable in early 2022, before rising slightly at the beginning of 2023 (although volumes remained lower than those seen prior to the pandemic).

Figure 6: Homicide Offences

Number of offences recorded by the MPS
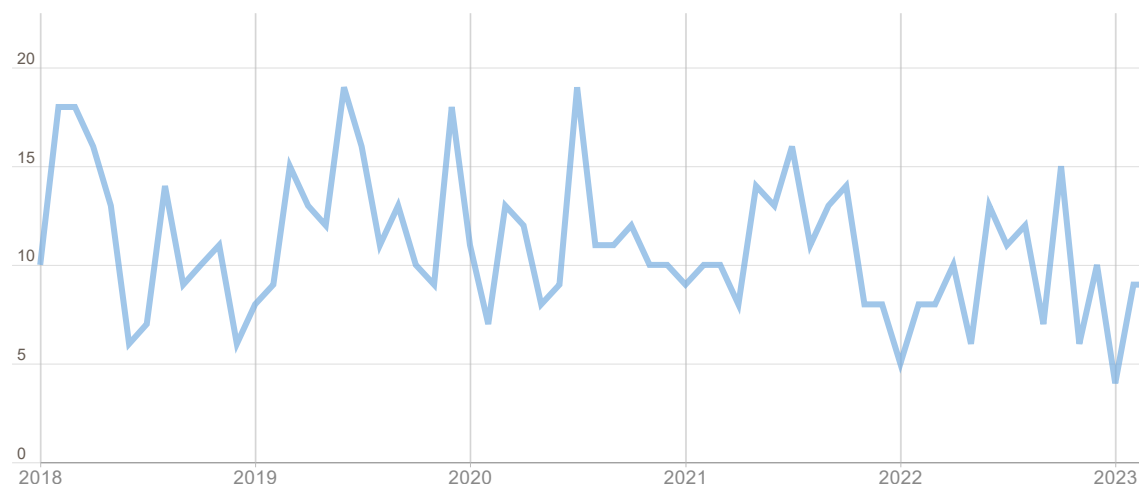
Source: MPS (Metropolitan Police Service) Crime Data Dashboard

There has been notable variation in the monthly number of homicides since 2018, ranging from a low of four homicides in January 2023 up to 19 homicides in both June 2019 and July 2020.

The period between the second half of 2022 and March 2023 saw relatively low numbers of homicides, with the 15 recorded in October 2022 representing the only month above average.

The proportion of total homicide victims that were under the age of 25 increased from 33% in 2020 to 39% in 2021.

Males continue to be over-represented as homicide victims (78% of all victims in 2021).

Last year, over two-thirds of homicides involved the use of a knife/sharp instrument (70%), an increase of 12% from the proportion of homicides in 2020.

Acquisitive Crime

Figure 7: Personal Robbery
Number of offences recorded by the MPS (thousands)

Source: MOPAC Crime Dashboard.

While Personal Robbery offending had begun to drop at the start of 2020, it decreased sharply at the onset of the pandemic, reducing by 61% between March and April 2020.

After the significant drop in Personal Robbery offending at the onset of the pandemic, there was a period of instability, with a series of noticeable increases and decreases shown.

The periods of reduced offending align closely to the dates of the pandemic lockdowns. This suggests that reduced footfall may well have been a major contributor to these reductions in offending.

The upward trend in Personal Robbery offending shown in 2021 continued through 2022, and by early 2023 had returned to levels last seen in 2018, although this remains significantly lower than the offending levels seen in 2019.

Figure 8: Burglary Offences

Number of offences recorded by the MPS (thousands)
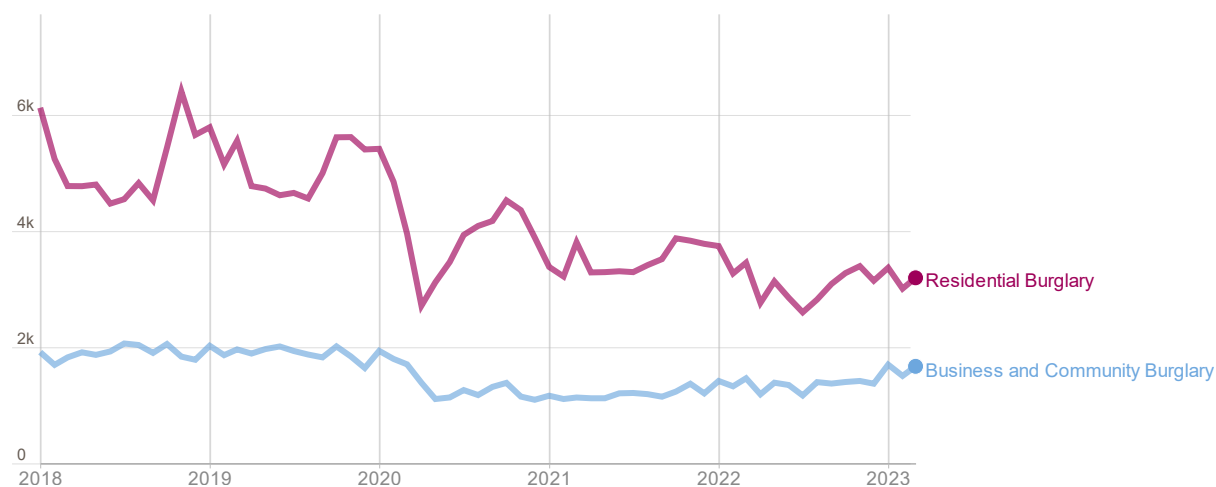
Source: MPS (Metropolitan Police Service) [Crime Data Dashboard](#) As per the chart, the category of Burglary offences comprises of a combination of Business and Community Burglaries (Non-Domestic) and Domestic Burglaries.

Prior to the outset of the pandemic, both Domestic and Business and Community Burglary offending levels were stable, with the monthly offence totals rarely deviating from the mean.

However, in April 2020, overall Burglary offending fell sharply. Domestic Burglaries fell 43% compared to offending levels in April 2019, while Business and Community Burglaries fell 27% over this period.

Following this dip in offending, Burglary levels have remained lower than before the pandemic. Residential Burglaries fell below 3,000 a month in the middle of 2022 but have since returned to a level of 3,000 to 3,300 a month. In contrast, Business and Community Burglary has seen an upward trend in offending since March 2021, with the latest month's figure some 14% higher than offending in March 2022.

Figure 9: Theft from Motor Vehicle Offences

Number of offences recorded by the MPS (thousands)

Source: MOPAC Crime Dashboard.

Following a surge in the volume of Theft from Motor Vehicle offending in late 2019 and early 2020, offending decreased sharply at the start of the first national lockdown in April 2020 – down 44% on offending levels a year earlier. Offending spiked in the middle of 2020 before falling again during the second lockdown at the end of late 2020 and into 2021.

Since late 2021, monthly offending levels have remained relatively stable, although they remain below levels seen prior to the pandemic. For example, the first three months of 2023 witnessed 17% less offences than the same period in 2019.

Figure 10: Theft from Person Offences

Number of offences recorded by the MPS (thousands)
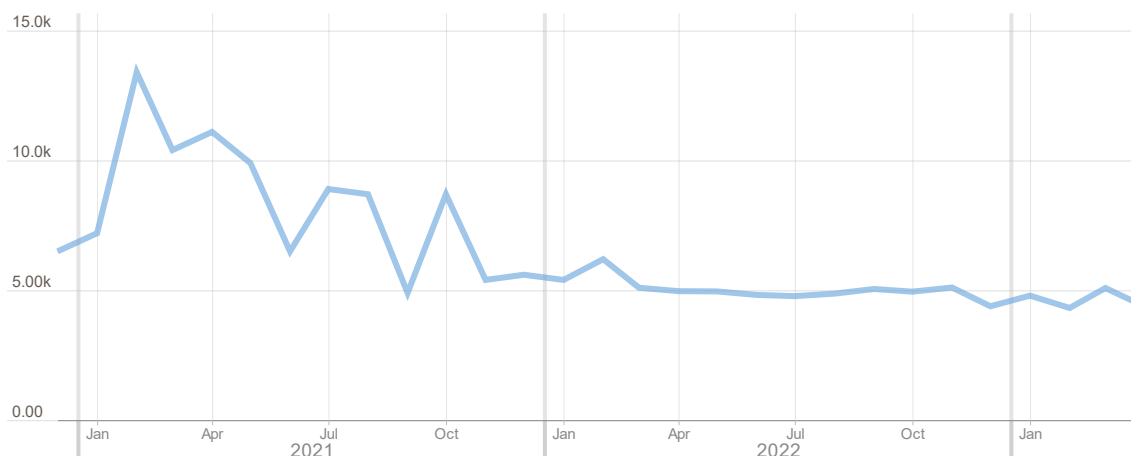

Source: MOPAC Crime Dashboard.

An upward trend in Theft from Person offending was apparent throughout 2018 and 2019, before offences fell very sharply at the start of the first national lockdown (with

April 2020 offences down 80% on the previous month). Offending levels rose in mid-2020 then fell again during the second lockdown.

The upward trend in Theft from Person offending resumed in mid-2021, with numbers surpassing pre-pandemic levels by the end of 2022. The latest figure for March 2023 was 13% higher than that for March 2022.

Figure 11: Fraud and Cyber Crime

Number of offences reported to Action Fraud (thousands)

Source: NFIB Fraud and Cyber Crime Dashboard. Only fraud and cyber-crime offences that constitute a crime under the Home Office Crime Recording rules are included. For note: data is only provided on the dashboard for the most recent 13-month period, hence the limited timeseries presented on the chart.

A significant increase in fraud and cyber-crime offences occurred in February 2021 compared to the preceding two months. However, from this point on, a steady decrease in offending levels was observed through to early 2022. Since then, the volume of recorded fraud and cyber-crime offences has remained stable.

Of the 71,720 reports recorded in the most recent 13-month period, 92% related to fraud (65,970 reports) and the remaining 8% related to cyber-crime (5,750 reports). Collectively, these incidents resulted in a total reported loss of £1.7 billion.

Individuals were victims much more frequently than organisations (82% versus 18%). While no gender differences in victimhood were found, those aged 20-29 years and 30-39 years were more likely to have been victims.

Safety

Figure 12: Anti-Social Behaviour
Number of calls received by the MPS (thousands)

Source: MOPAC Crime Dashboard. The data in the chart refers to calls made to the MPS to report Anti-Social Behaviour and does not reflect the distinct number of ASB (Anti-Social Behaviour) incidents. There may be more than one ASB call to the same ASB incident.

While the total Anti-Social Behaviour (ASB) calls received by the MPS are a combination of Personal, Nuisance and Environmental ASBs[21], the vast majority relate to Nuisance ASB (90%).

The onset of the pandemic brought a significant increase in ASB calls, with March 2020 showing a 35% increase from the number of calls recorded in February, and April and May showing a 272% and a 257% increase, respectively.

At the start of the pandemic, before a specific dedicated code was introduced by the MPS to denote COVID-19 related calls, these calls were classified as Nuisance ASB calls. This is likely to be responsible for much of the increase in this type of call during that period.

Following the spike in ASB calls at the beginning of the pandemic, calls followed a generally downward trend from summer 2020 onwards, so that by mid-2022 they fell below levels seen in 2019 (before the pandemic). Early 2023 continued this trend, with calls received in April 2023 some 13% lower than in April 2019.

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[21] Personal ASB – when a person targets a specific individual or group. Nuisance ASB – when a person causes trouble, annoyance or suffering to a community. Environmental ASB – when a person's actions affect the wider environment, such as public spaces or buildings.

Figure 13: Harassment

Number of offences recorded by the MPS (thousands)
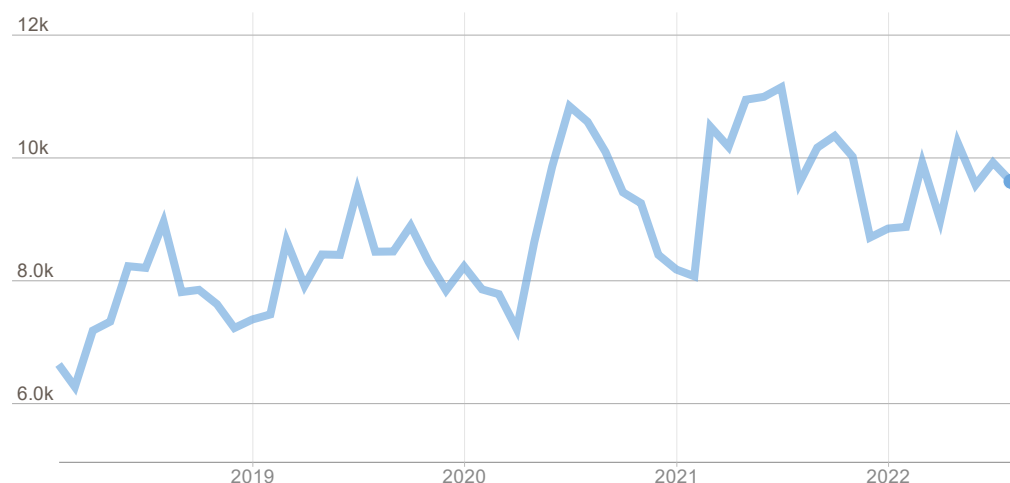
Source: MOPAC Crime Dashboard.

Harassment offending has displayed an upward trend over the last four years, although temporary dips in offending were observed during the pandemic lockdowns.

Currently, overall offending continues to remain elevated above the levels seen pre-pandemic, with August 2022 recording a 14% increase on August 2019.

While a substantial proportion of the increase in Harassment offending can be explained by amendments in the Home Office counting rules for Stalking offences[22] and an increase in police officer awareness, it is likely that there also was an *actual* increase in the number of offences being reported.

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[22] Meaning that from April 2020 all cases where there were two or more previous similar incidents between a victim and their former partner the incident was to be recorded as a Stalking offence

Figure 14: Feeling of Safety after Dark

Percentage of survey participants (PAS) that feel unsafe walking alone in their local area after dark

■ Male   ■ All   ■ Female
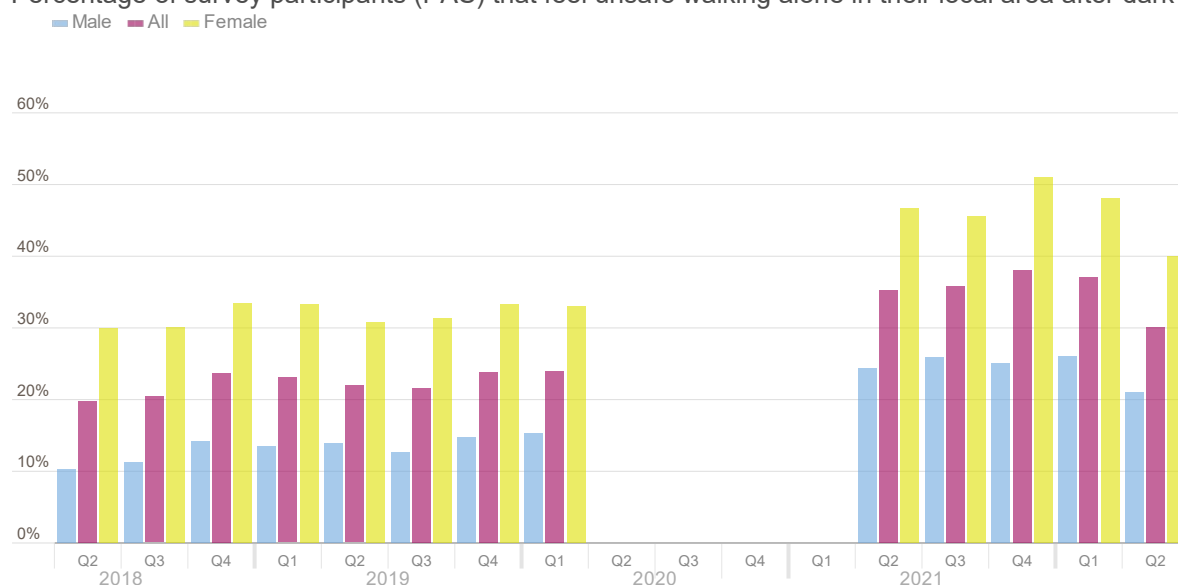
Source: MOPAC Public Attitude Survey. For note: data is only available for safety at night not during the day as well - there is no historical data yet for the newly added "safety in the day" question. Further, due to the pandemic, there is no data for 2020-21.

A greater proportion of female respondents feel unsafe walking alone in their local area after dark than male respondents.

Prior to the pandemic, around a third of female respondents felt unsafe compared to one in eight male respondents.

Since the start of the pandemic, these feelings have deteriorated for both groups of respondents. However, the proportion of females feeling unsafe continued to be significantly higher (46%) than that for males (24%).

Figure 15: Satisfaction Level of Reporting Victims (MPS)
Percentage of survey participants (USS/TDIU)
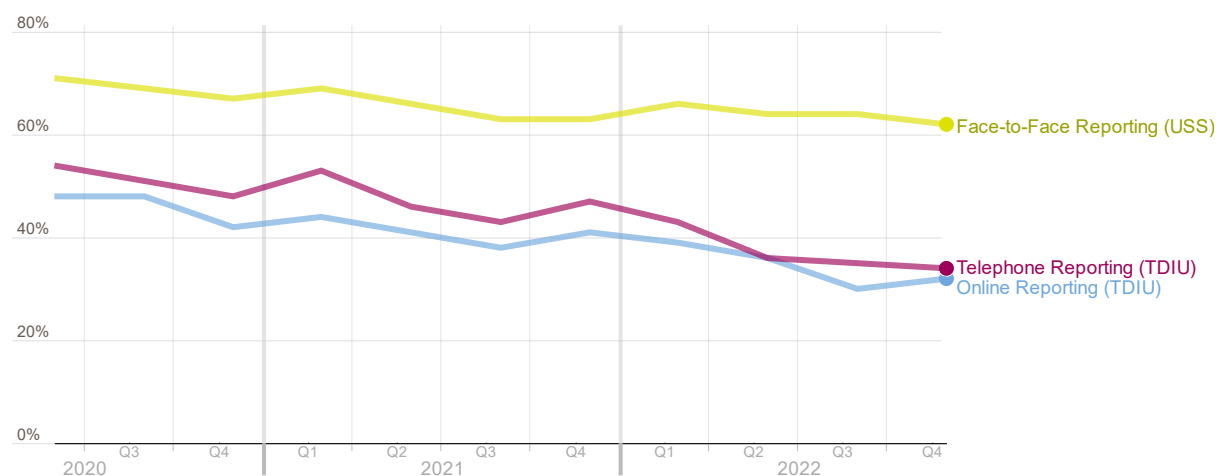
Source: MOPAC Public Voice Dashboard. Data sourced from the User Satisfaction Survey and the Online Victim Satisfaction Survey for Q3 21-22. The demographic comparisons are based on the R12 period to Q3 2021-22. The chart shows victim satisfaction levels by three difference crime reporting methods (face-to-face, online reporting and telephone reporting).

Victim satisfaction measures how victims feel about several aspects of the service provided to them by the Metropolitan Police, such as police actions and treatment.

This level of satisfaction is significantly higher for victims reporting crimes face-to-face (62%) than for victims using other reporting methods.

The divergence in trends of satisfaction according to reporting method is widening. Victim satisfaction reported face-to-face has been broadly stable over the year to Q4 2022, but satisfaction levels reported by telephone and online have declined over this period by 13 and nine percentage points, respectively.

Victims with a disability were much less satisfied when reporting a crime face-to-face than victims without a disability – however, this disparity was not apparent for either the telephone or online reporting methods. Similar trends hold for victims from the LGBT+ community.

While White victims tended to be more satisfied than other ethnicities across all three crime reporting methods, this discrepancy was lowest for the online method of reporting a crime.

Figure 16: Fair Treatment by the Metropolitan Police Service

Percentage of survey participants (PAS) who agree that the police treat everyone fairly regardless of who they are
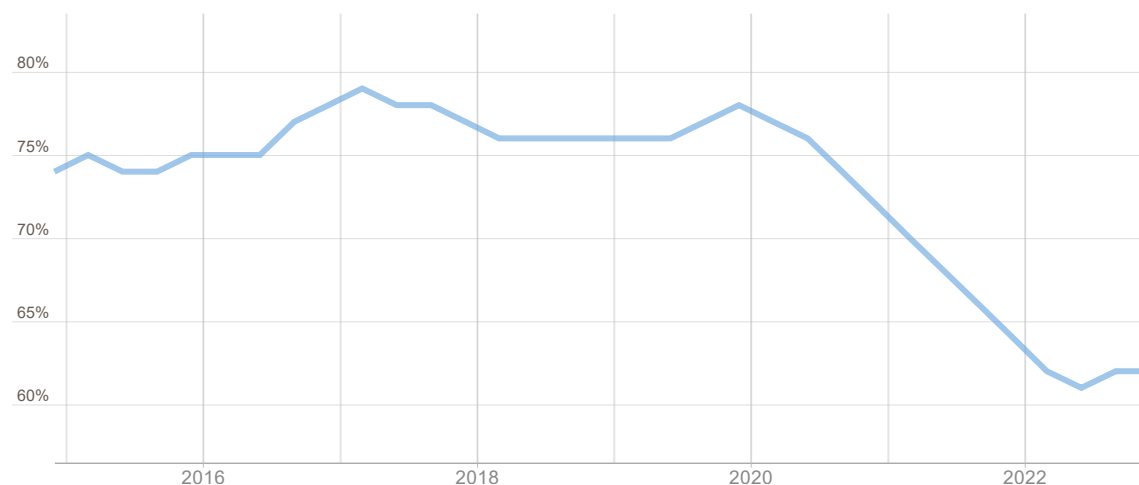
Source: MOPAC Public Voice Dashboard. Data sourced from the Public Attitude Survey (PAS). R12 month datapoints. Percentage of respondents who agree the MPS treat everyone fairly regardless of who they are.

Over 2020 and 2021, the percentage of survey respondents who agreed that the police treat everyone fairly, regardless of who they are, declined significantly (from around 77% to 64%). The rate was even lower throughout 2022 (at 61-62%), but may have stabilised.

However, it is worth noting that this decline may in part be attributed to a change in the interview methodology that was introduced to the survey in April 2020.

Young people were least likely to agree that the police treat everyone fairly.

Respondents of Black (48%) and Mixed (41%) ethnicities were less likely to agree with that sentiment than respondents from other ethnic groups.

Meanwhile, the proportion of LGBT+ respondents who agreed with the statement was significantly lower than that for non-LGBT+ respondents (48% versus 62%).

8: THE ENVIRONMENT

The London Environment Strategy, published in May 2018, set out the Mayor's vision for tackling the climate and ecological emergencies whilst improving London's air quality. These are also linked to social equality issues; for example, poor air quality disproportionately affects low-income and BAME Londoners.

This chapter provides up-to-date information on the state of London's environment covering the latest data on greenhouse gas emissions, air quality, recycling rates, green space, the energy efficiency of buildings and the green economy. For some domains such as air quality, there are recent and regularly updated data available through sensors across the city. However, for others such as greenhouse gas emissions, there is a considerable lag. Indicators that carry a lag but are important for understanding the policy area have been included.

Greenhouse Gas Emissions

The London Energy and Greenhouse Gas Inventory reports yearly GHG emissions in London by source.[23],[24] The most recent available data for London are from 2020.

In 2020, London's greenhouse gas emissions were the equivalent of 28.1 megatons of CO_2 (MtCO2e) across the seven emission sectors: domestic buildings; industrial and commercial buildings; transport; waste; industrial processes and product use; stationary energy and agriculture, forestry and other land use. Emissions from domestic and industrial and commercial buildings were responsible for 68% of total emissions in London, followed by transport at 24% with all other sources responsible for the remaining 8%.

Overall, emissions in London in 2020 decreased significantly. The reduction in emissions is primarily due to the impact of COVID-19 and lockdown restrictions on activity in London, particularly on the transport sector. London's trend of reducing emissions can be seen in Figure 1. The 2020 emissions represent a 38% reduction on 1990 levels and a 45% reduction compared to 2000, despite a significant increase in population over the same period of 32% and 24%, respectively.

London's per capita emissions have reduced by 53 per cent, from 6.7 MtCO2e per capita in 1990 to 3.1 MtCO2e per capita in 2020. Compared to the rest of the UK, London has the lowest CO_2 per capita emissions of any region due to the city's extensive public transport system, a high population density and its lower level of large industrial facilities than in other regions.

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[23] For ease of reporting, the different GHG emission levels are converted into the CO2 emissions levels that have an equivalent potential of global warming. The measurement unit is hence named tonnes of CO2 equivalent, or tCO2e – see HM Government, Environmental Reporting Guidelines.

[24] For comparisons with trends outside London, see BEIS, Local authority and regional carbon dioxide emissions national statistics – including CO2 emissions by activity and source, transport type and land use. For more detailed data on emissions and removals from land use by Local Authority in the UK, see UKCEH, Detailed emissions and removals from land use, land-use change and forestry, published on the National Atmospheric Emissions Inventory website.

London's 2021 emissions data will be published by the end of 2023 and they are likely to show an increase from 2020 levels as COVID-related impacts subside.

Figure 1: Greenhouse Gas emissions in London

Megatons of CO_2 equivalent
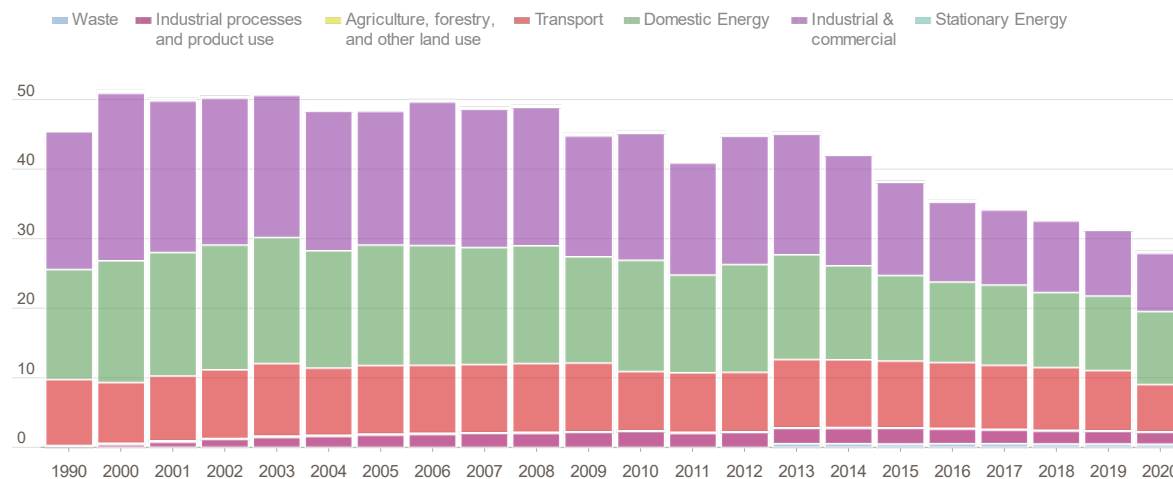
Source: GLA, LEGGI, 2023

The National Atmospheric Emissions Inventory's (NAEI) Local Authority CO_2 interactive map is an alternative source of data on the concentration of CO_2 emissions in the UK by Local Authorities. While the NAEI includes the latest available data on CO_2 emissions in London, LEGGI was considered the best source of data for the GHG emissions indicator (Figure 1) data as it reports on all GHG emissions rather than just CO_2. It is updated yearly, and is available by sector and borough.

Air Quality

In April 2023 the GLA published an updated London Atmospheric Emissions Inventory (LAEI)[25] providing projections for the years 2025 and 2030. Data showed how despite progress towards the WHO interim targets, all of London exceeds the WHO annual average guidelines of 10 µg/m^3 for NO_2 and 5 µg/m^3 for PM$_{2.5}$ in 2019, and forecasts show that all of London will continue to exceed them in both 2025 and 2030 without further action.

Nitrogen Dioxide (NO_2) is a gas resulting from combustion (vehicles, heating, etc.) that can be toxic if inhaled in high doses for a sufficiently long time and contributes to respiratory and cardiovascular health issues. The annual legal UK limit is set at an

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[25] London Atmospheric Emissions Inventory (LAEI) 2019 – available: https://data.london.gov.uk/dataset/london-atmospheric-emissions-inventory--laei--2019?_gl=1%2a1cklywm%2a_ga%2aMTUzMTgxMjYwMC4xNjgzMDM4MDM4%2a_ga_PY4SWZN1RJ%2aMTY4NjE2MjczOS4xLjEuMTY4NjE2Mjc1Mi40Ny4wLjA.

average concentration of 40 μg/m^3 over a year, whereas the World Health Organisation (WHO) guideline is 10 μg/m^3.[26]

Figures 2-7 show the monthly average concentrations for all regulatory air quality monitoring stations in London averaged by location – Central (within the congestion charge zone), Inner (within the Ultra Low Emission Zone), Outer, and also by site type – roadside and background. Roadside sites are those within one to five metres of the kerb of a busy road and urban background sites are broadly representative of city-wide background conditions.

Figure 2: Nitrogen Dioxide concentration at the roadside
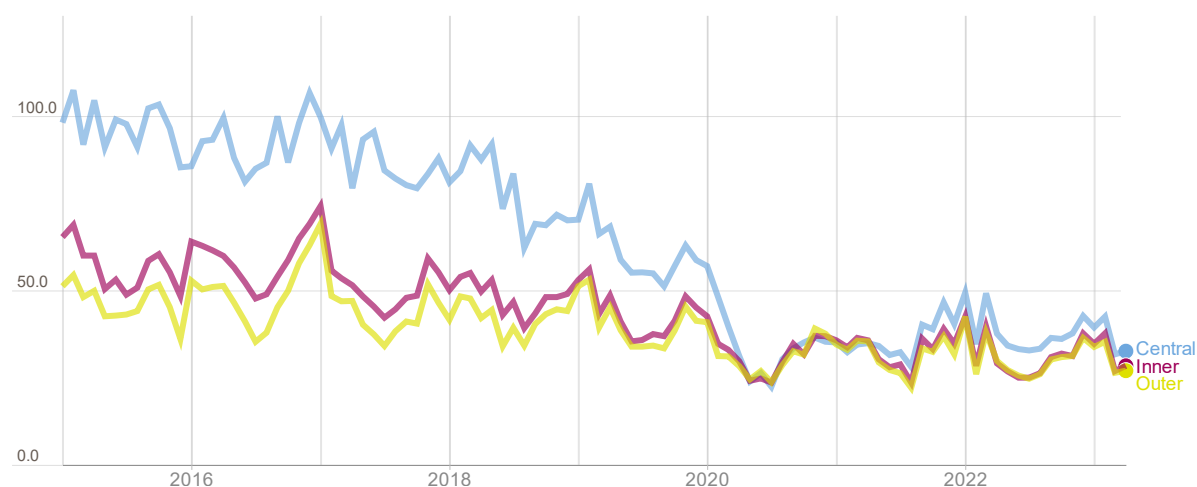
Micrograms per cubic meter (μg/m^3)

Source: London Air and Air Quality England. For the most up-to-date data see the Resilience Dashboard.

Figure 2 shows that NO$_2$ concentration across Central, Inner, and Outer roadside areas have followed a downward trend since 2017, although concentrations in Central London have fallen more rapidly than elsewhere, a reduction of 56% from 2017 to October 2022[27]. This is due to the combined impact of air quality policies such as the Ultra Low Emission Zone (ULEZ) and the traffic reductions seen in Central London due to the COVID-19 pandemic.

During the COVID-19 pandemic and until mid-2021, concentrations of NO$_2$ were at similar levels across the whole of London. Since then, NO$_2$ concentrations in Central London have increased above those of Inner and Outer London again, though they remain much lower than pre-pandemic levels.

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[26] For the legal and recommended limits, see The Air Quality Standards Regulations 2010, Schedule 2 and the WHO global air quality guidelines 2021, Section 3 respectively. Note also the London Atmospheric Emissions Inventory 2019 provides detailed mapping of air pollutants in London, however this has not been reviewed here as it does not include frequently-updated data.
[27] https://www.london.gov.uk/sites/default/files/2023-02/Inner%20London%20ULEZ%20One%20Year%20Report%20-%20final.pdf

Figure 3: Nitrogen Dioxide concentrations in the urban background

Micrograms per cubic meter ($\mu g/m^3$)
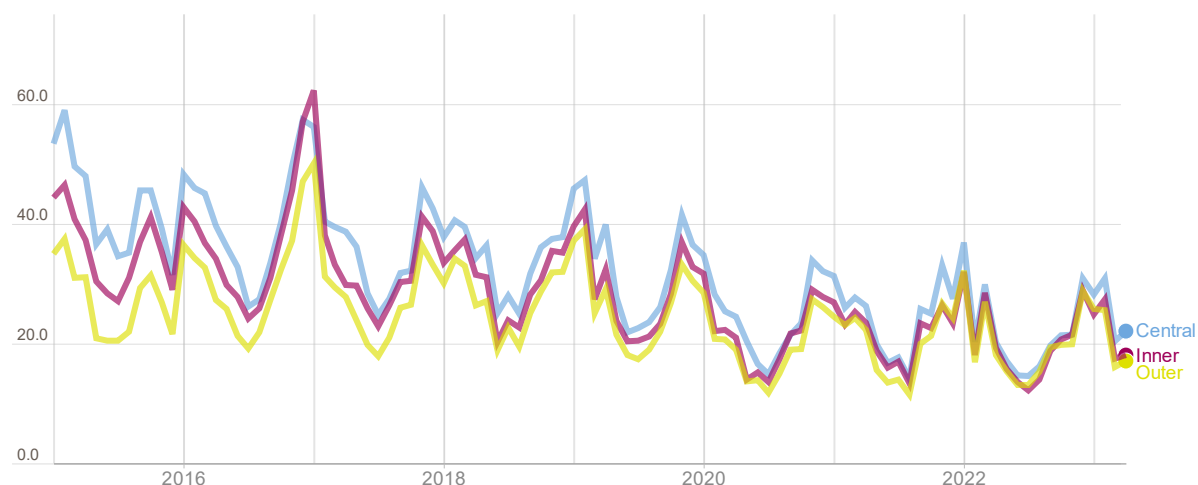
Source: London Air and Air Quality England. For the most up-to-date data see the Resilience Dashboard.

Urban background NO_2 concentrations are generally lower than roadside concentration and have remained mostly below the legal limits since 2017. However, they are still exceeding WHO recommended guidelines of 10 $\mu g/m^3$. Figure 3 also shows the typical seasonal variation seen in NO_2 concentrations with highs in the winter and lower levels in the summer months.

In contrast to roadside pollution, NO_2 emissions in the urban background across the whole of London have remained at a relatively similar level over time.

Particulate matter is a mix of non-gaseous material produced mainly by traffic exhaust emissions and tyre and brake wear. This can be toxic if inhaled in high doses for a sufficiently long time. It is usually categorised according to the maximum size of each particle (PM_{10} or $PM_{2.5}$, the latter being the smaller one), with smaller particles having higher toxicity. Fine particulate matter ($PM_{2.5}$) is the air pollutant considered by scientists the most harmful to health.

Figure 4: PM$_{10}$ particulate concentration at the roadside
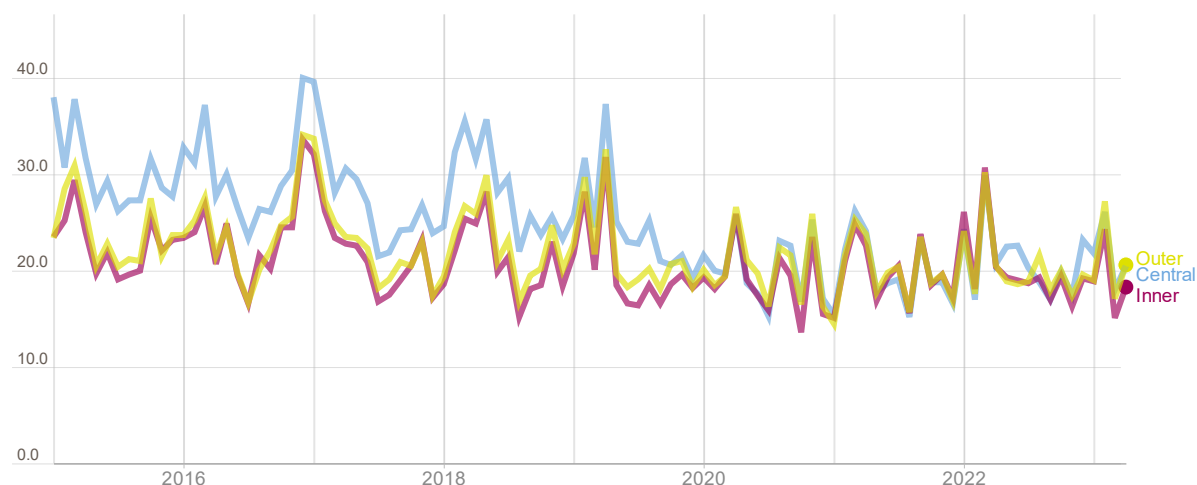
Micrograms per cubic meter (μg/m^3)

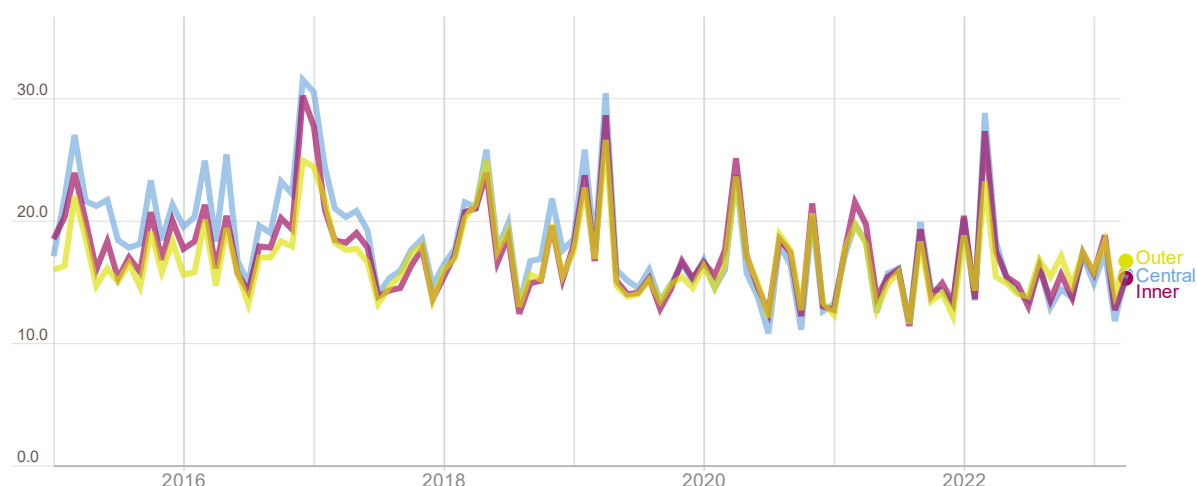*Source: London Air and Air Quality England. See up-to-date data on the Resilience Dashboard.*

Figure 4 shows the concentration of particulate matter PM$_{10}$ at the roadside for Central, Inner, and Outer areas in London averaged per month.

Across all of London, PM$_{10}$ levels have remained below the annual average legal limit of 40 μg/m^3 for over seven years. PM$_{10}$ levels have also followed a persistent downward trend, although they are still exceeding the WHO recommended guideline of 15 μg/m^3. Since 2020, the average concentrations for each zone have converged and remained at a similar level.

Figure 5: PM$_{10}$ particulate concentration in the urban background

Micrograms per cubic meter (μg/m^3)

Source: London Air and Air Quality England. See up-to-date data on the Resilience Dashboard.

Consistent with measurements for NO$_2$, PM$_{10}$ levels in the urban background are generally lower than those on the roadside. This is due to road transport being the source responsible for the biggest emissions of both.

Figure 5 shows a decreasing trend in PM_{10} concentrations, though not as pronounced as for NO_2. Urban background PM_{10} concentrations have been similar in all three areas of London since 2018 and from mid 2022 monthly average concentrations in Outer London have slightly exceeded those in Central London.

Figure 6: PM2.5 concentration at the roadside

Micrograms per cubic meter (µg/m³)
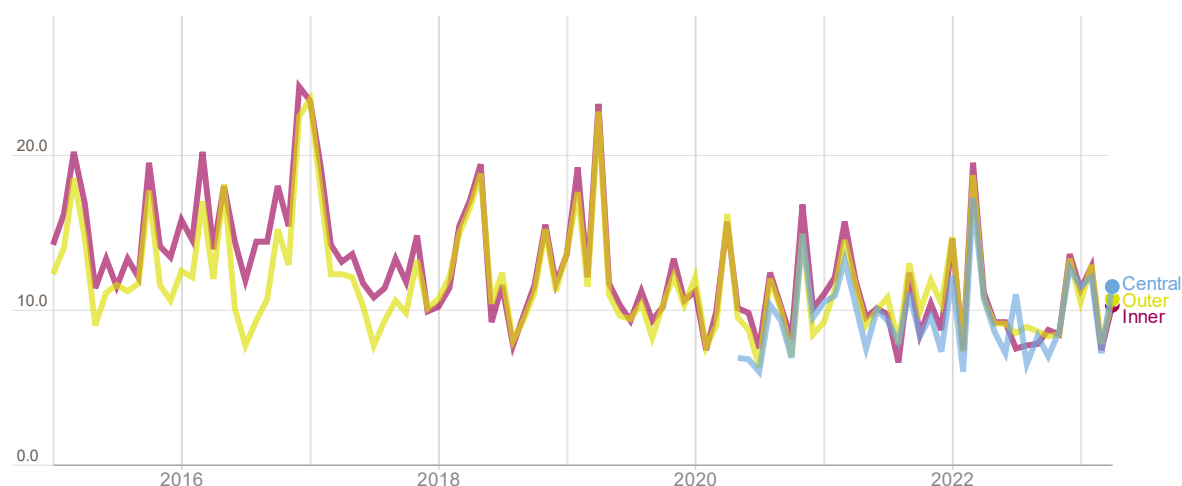
Source: London Air and Air Quality England. See up-to-date data on the Resilience Dashboard.

$PM_{2.5}$ levels have remained below the legal limit of 25 µg/m³ for over seven years, albeit above the WHO guideline level of 5 µg/m³.

Looking beyond the monthly fluctuations shown in Figure 6, annual average $PM_{2.5}$ levels fell between 2017 and 2018 in Inner London, converging to the levels of the Outer area, where the $PM_{2.5}$ annual average concentration remained relatively stable.

$PM_{2.5}$ levels decreased during 2020 and 2021, although 2021 levels increased in Outer London compared to the previous year.

Figure 7: PM2.5 concentrations in the urban background
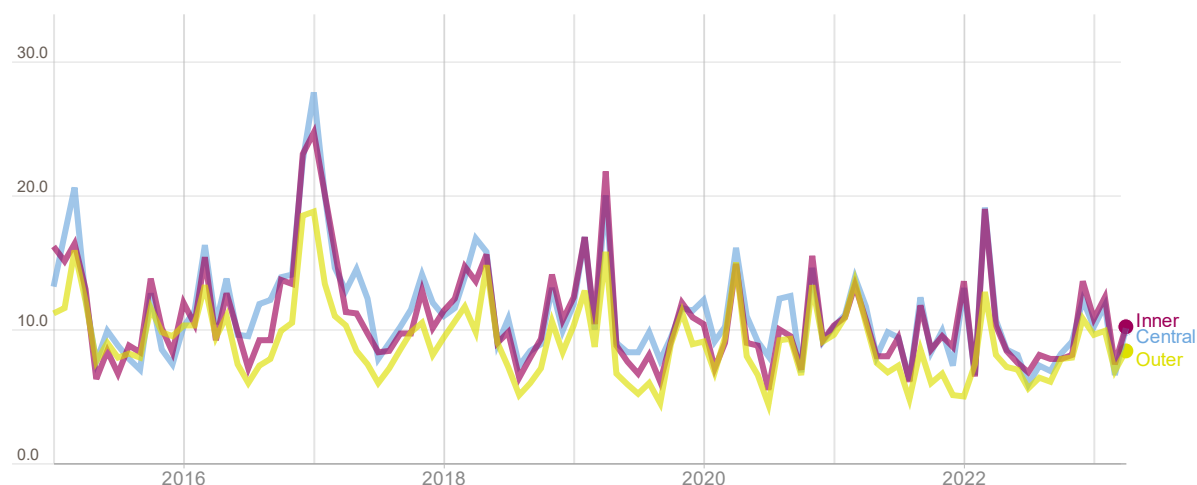
Micrograms per cubic meter (µg/m³)

Source: London Air and Air Quality England. See up-to-date data on the Resilience Dashboard.

Figure 7 shows the concentration of PM$_{2.5}$ at the urban background for Central, Inner, and Outer areas in London averaged per month.

As with measurements for NO$_2$ and PM$_{10}$, levels of PM$_{2.5}$ in the urban background are generally lower than those on the roadside, albeit marginally in this case. On some occasions, PM$_{2.5}$ levels in the urban background have even surpassed those on the roadside. This is due to PM$_{2.5}$ being heavily influenced by sources outside of London as well as meteorological conditions.

PM$_{2.5}$ concentration levels in the urban background have followed similar trends to those in the roadside.

Readers may also want to refer to the following sources for more information:

A London-wide map showing the hourly concentration of air pollutants, provided by the London Air Quality Network.

Breathe London provides a map with charts on the concentration of air pollutants at several measurement sites across London updated every hour.

Waste and circular economy

Figure 8: Household waste collected by Local Authorities
Relative % compared to of 2011/12 values
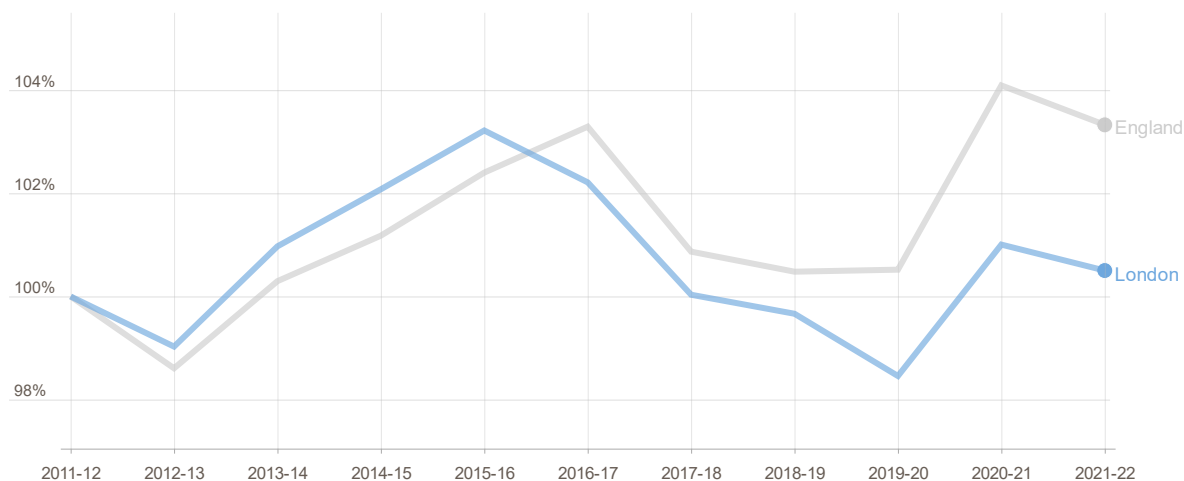
Source: DEFRA, ENV18 - Local authority collected waste. Data is also available at local authority level.
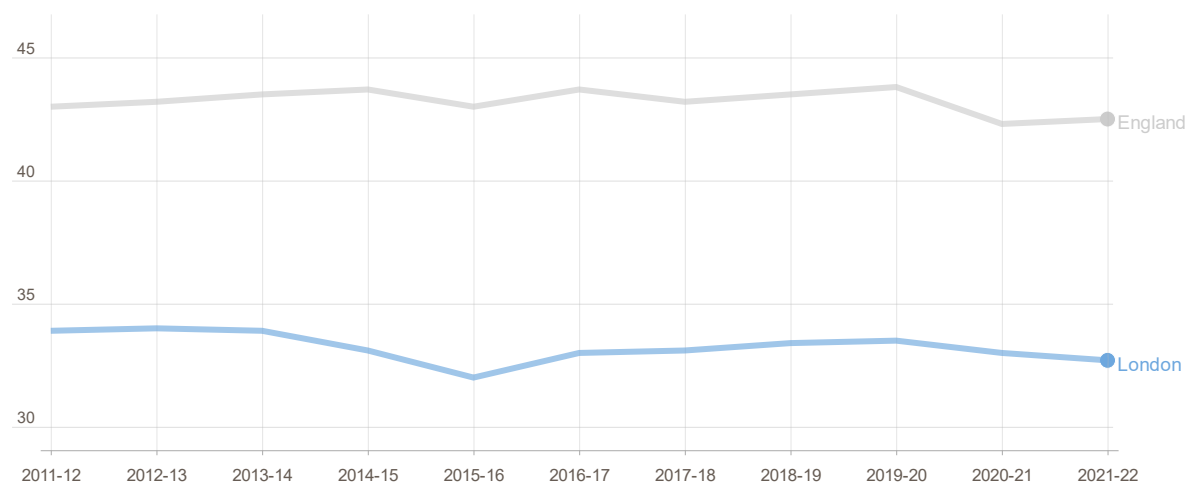
The chart above shows how the volume of household waste collected by Local Authorities (including waste *and* recycling volumes) has changed in London and England, compared to 2011/12 volumes.[28]

Trends across London and England have remained relatively comparable. 2020/21 saw a surge in collected waste, which could be potentially explained as a by-product of lockdown restrictions and the increase in working from home arrangements. The 2021/22 volumes in both London and England show a decrease compared to the previous year.

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[28] The 'household waste' measure includes waste from regular household collections and household recycling, as well as waste from other household sources and civic amenity sites.

Figure 9: Household waste recycling rate
% of collected household waste that is recycled

Source: DEFRA, ENV18 - Local authority collected waste. Data is also available at the level of Local Authorities.

The chart above shows the share of household waste collected by Local Authorities in London and England that is sent for recycling.

London has the lowest household recycling rate of any English region, with a 2021/22 rate of 32.7% against a national rate of 42.5%[29]. Increasing recycling in London can be challenging, as a high proportion of Londoners live in flats (up to 80% in some areas), and compared to other English regions, London is a highly urban environment with limited space for the segregation of waste, and less garden waste is produced. London also has a highly transient and diverse population with over 100 languages spoken, which can make communicating different borough recycling services more difficult.

The recycling rate has remained relatively consistent in recent years, both in London and nationally. The most recent Defra data show London experienced a 0.3% decrease in recycling against a small rise of 0.2% in the national figure in 2021/22.

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[29] https://www.gov.uk/government/statistics/local-authority-collected-waste-management-annual-results-202122/local-authority-collected-waste-management-annual-results-202122

Energy generation and efficiency

Figure 10: Energy efficiency ratings of new and existing homes, London

% of all domestic dwellings (new and existing homes) with an energy performance certificate rating of A-C, as a share of all homes registered on Buildings Register
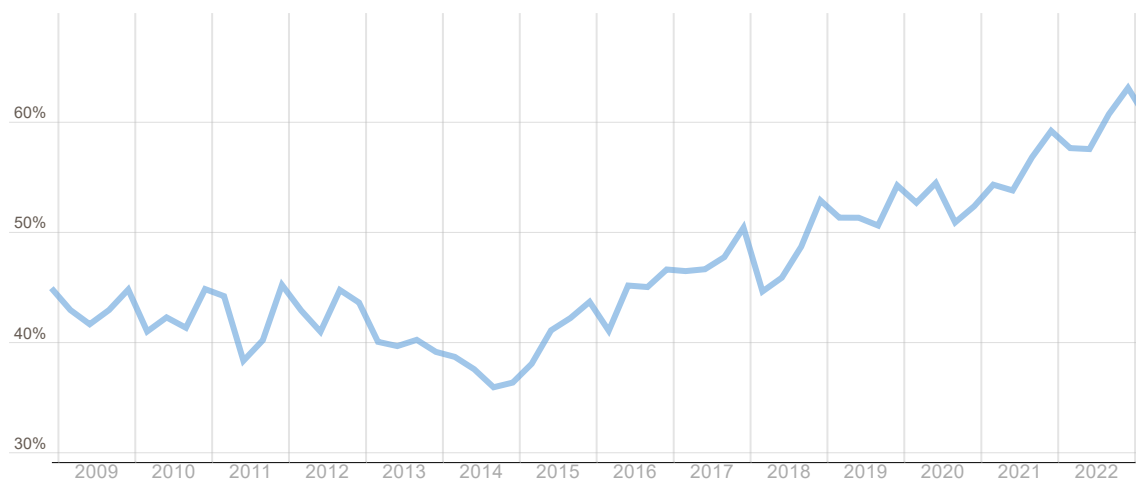
Source: DLUHC, MHCLG, Live tables on Energy Performance of Buildings Certificates, Table D1: domestic EPCs for all dwellings by energy efficiency rating. Data is also available at the level of Local Authorities.

Dwellings which are sold, let, or reconstructed require an assessment to obtain an energy performance certificate and a related rating between A and G, where A represents the highest efficiency rating and G the lowest. Such certificates (for existing or newly built dwellings) are added to the Energy Performance of Buildings Register.

Figure 10 shows the share of those certificates added to the register in a quarter with an efficiency rating of A-C (not cumulative totals). Data are based on experimental statistics.

Since the last quarter of 2014, the energy performance of dwellings added to the register increased steadily, with a more marked increase in 2021 and 2022, but dropping slightly in the first quarter of 2023. Rising energy costs combined with the minimum energy efficiency standards (MEES) requirement for rental properties are both likely to have contributed.

Figure 11: Renewable electricity generation in London

Gigawatt-hours (GWh)
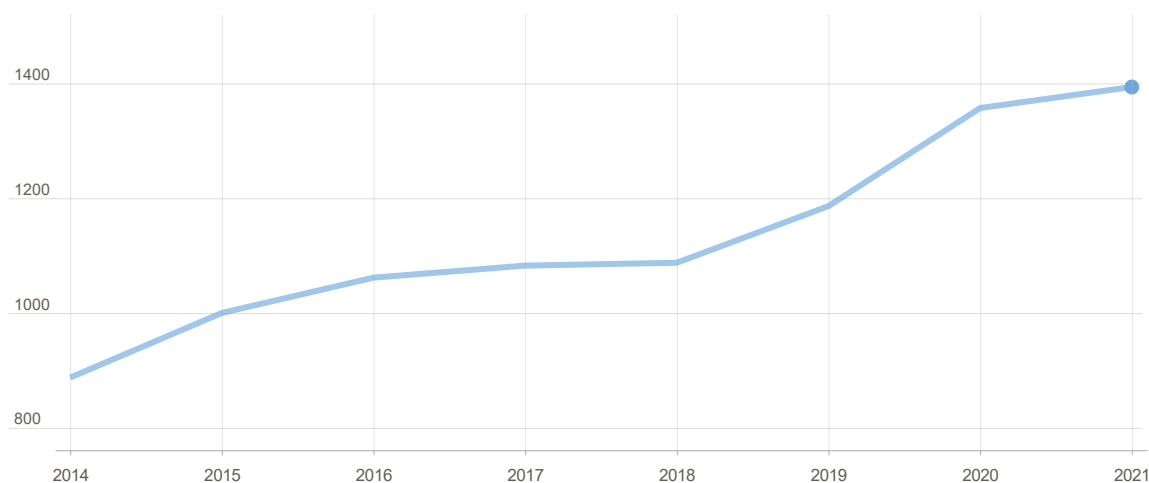
Source: BEIS, Regional Renewable Statistics, Regional Statistics 2003-2021: Generation. Data is also available at the level of Local Authorities.

The chart above shows the levels of electricity generated in London by means of renewable sources, such as wind, photovoltaic, landfill and sewage gas, or other biomasses and waste.

Over 2014-2021, renewable electricity generation in London increased by over 50%. Total energy consumption in London in 2020 (the latest data available from the LEGGI) was over 122,700 GWh – meaning renewable energy production accounted for over 1.1% of the total production.

Zero Carbon Circular Economy

The Department for Levelling Up, Housing and Communities (DLUHC) provides an Interactive EPC Tool, a dashboard with quarterly statistics on Energy Performance issued for domestic and non-domestic buildings.

Green infrastructure

The GLA has prepared a number of interactive Green infrastructure maps and tools to help understand London's green infrastructure. This includes a green cover map based on high-resolution aerial imagery and land use mapping to identify how much of London is covered by trees, plants and open water. The green cover map currently displays 2016 data and will be updated later in 2023.

9: HOUSING

There were around 3.75 million homes in London in 2022, a number that has increased by around 40,000 a year on average in recent years. According to the 2021 London Plan, around 66,000 new homes are required each year to meet the needs of London's growing population and deal with the accumulated backlog of unmet needs.

As a result of housing supply not keeping up with demand, London's housing costs are very high: the median price of homes sold in London in the year ending September 2022 was £525,000, while the median private rent was £1,475 per month (a figure that does not reflect in full the significant increases in rents for new tenancies throughout 2022 and 2023).

The high cost of housing and the scarcity of suitable accommodation means that London has particularly high rates of housing need. According to official statistics, around 1.6% of all households in London are homeless and living in temporary accommodation, compared to around 0.2% in the rest of England.

This chapter sets out trends for a selection of key housing indicators, covering new supply, affordability and housing need. The indicators covered here are all monthly/quarterly and recently updated, while the GLA's annual Housing in London report presents a much larger set of indicators, including those reported annually and with a longer lag.

Housing supply

Figure 1: Annualised number of new homes completed in London
Energy Performance Certificates registered for new dwellings
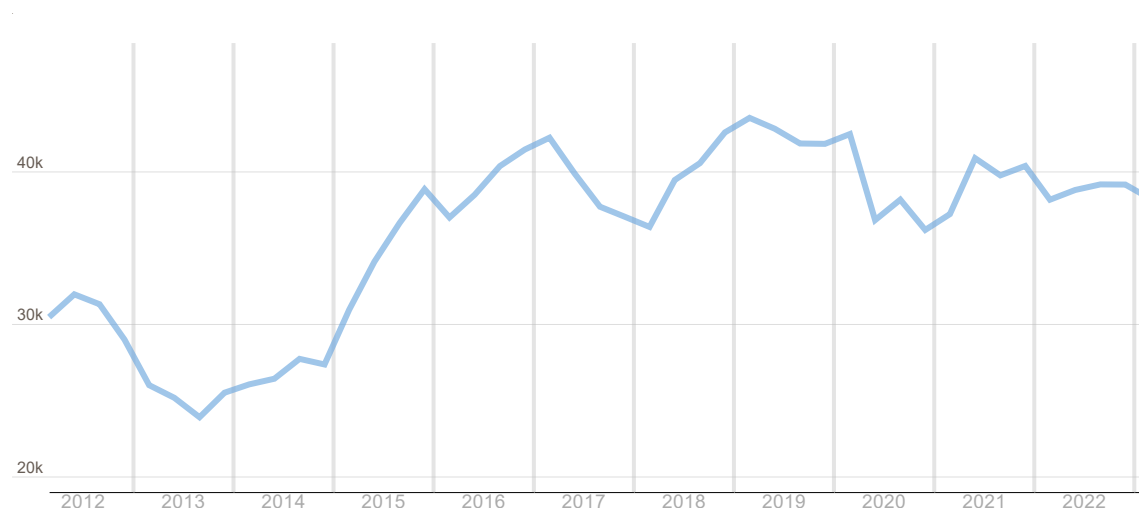

Source: DLUHC EPC live table NB1

An early indication of the trend in new supply is given by quarterly Department for Levelling Up, Housing and Communities (DLUHC) figures on the number of Energy

Performance Certificates (EPCs) issued for new homes in London. This figure has largely tracked net conventional completions data over recent years.

There were 38,220 EPCs issued for new homes in London in the year to March 2023, up very slightly from 38,140 the year before but below pre-pandemic levels.

Figure 2: Annualised planning permissions for new homes in London
Number of planning permissions
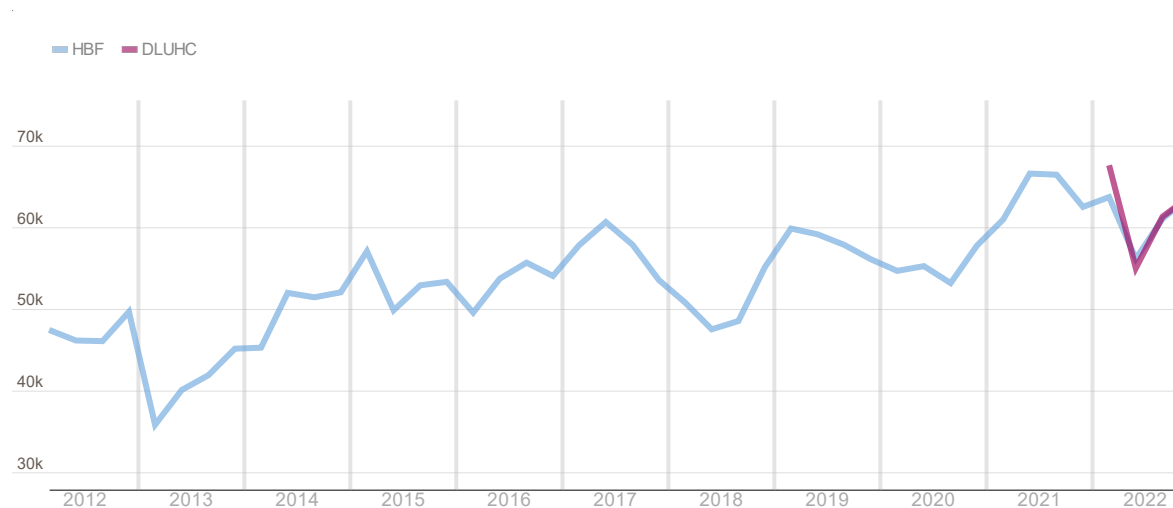
Source: HBF Housing Pipeline Report; DLUHC planning application statistics

DLUHC report the annualised number of new homes given planning permission on a quarterly basis, and according to their most recent figures there were 63,700 new homes approved in London in 2022, up slightly from 2021. On the face of it, these figures are not yet revealing the significant impacts that would perhaps be expected from the recent increases in construction material prices and interest rates.

The Home Builders Federation provides a longer historic time series on a consistent basis in its Pipeline Report, and its figures (unlike DLUHC's) are subject to revision over time as new data becomes available.

Not all planning permissions result in new homes being completed, as some schemes get revised while others never come to fruition. The number of permissions needed to meet London's need for 66,000 net new homes a year is therefore significantly higher than the recent figures.

Energy efficiency and affordability

Figure 3: Energy efficiency ratings in new homes, London
% of homes registered with energy efficiency ratings of A or B, as a share of all new homes
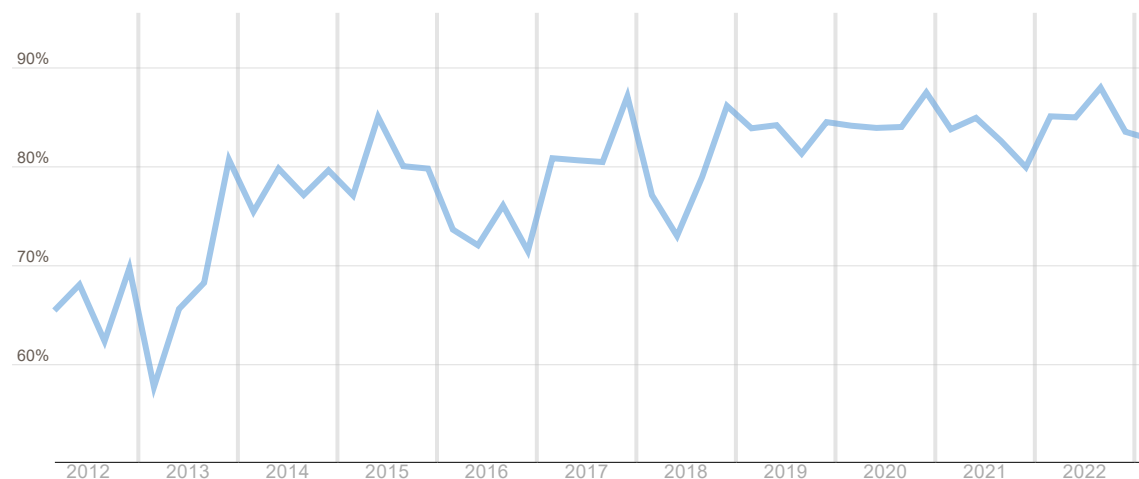
Source: *DLUHC EPC live table NB1*

According to data from Energy Performance Certificates, 83% of new homes completed in London in Q1 2023 had an energy efficiency rating of A or B, up from around 60% in 2012 but down from a peak of 88% in Q3 2022.

Across England as a whole, 85% of new homes completed had a rating of A or B in Q3 2022.

Figure 4: Private rent affordability
Average of achieved rent as share of household income, for new tenancies
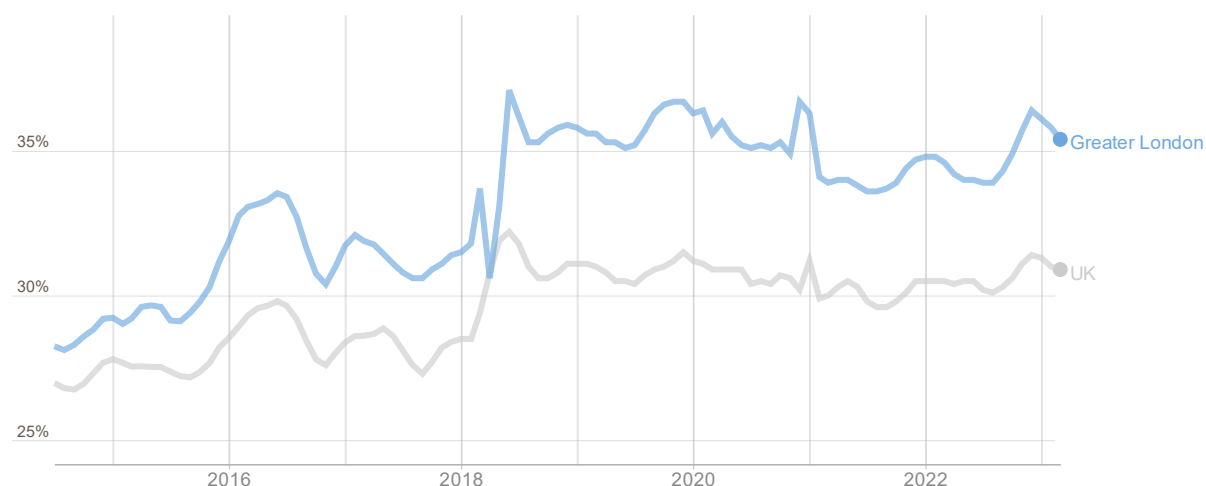
Source: *Homelet Rental Index*

According to data from tenant references collated by Homelet, the rent on new tenancies in London accounted for an average of 35.4% of tenant incomes in March 2023, up slightly from 34.6% in March 2022.

Across the UK as a whole, private rents on new tenancies accounted for 30.9% of tenant incomes in March, again up slightly from the year before.

Separate analysis of Households Below Average Income survey data indicates that Black, Asian and other minority ethnicity households in London's private rented sector tend to spend a higher proportion of their income on rents than White households. This results in difficulties keeping up with housing costs: according to data from the 2016-17 to 2018-19 English Housing Survey, more than half of Black and Asian private renters and almost half of Black and Asian social tenants in London said they found it difficult to pay their rent. Meanwhile, among homeowners, households from minority ethnic groups were at least twice as likely as White households to say they found it difficult or very difficult to keep up with their payments. These figures date from before the pandemic, but if anything the gaps between different ethnic groups are likely to have widened since then, given the greater increases in costs for renters compared to homeowners.

Housing need

Figure 5: Possession claims made by social or private landlords in London
Number of claims
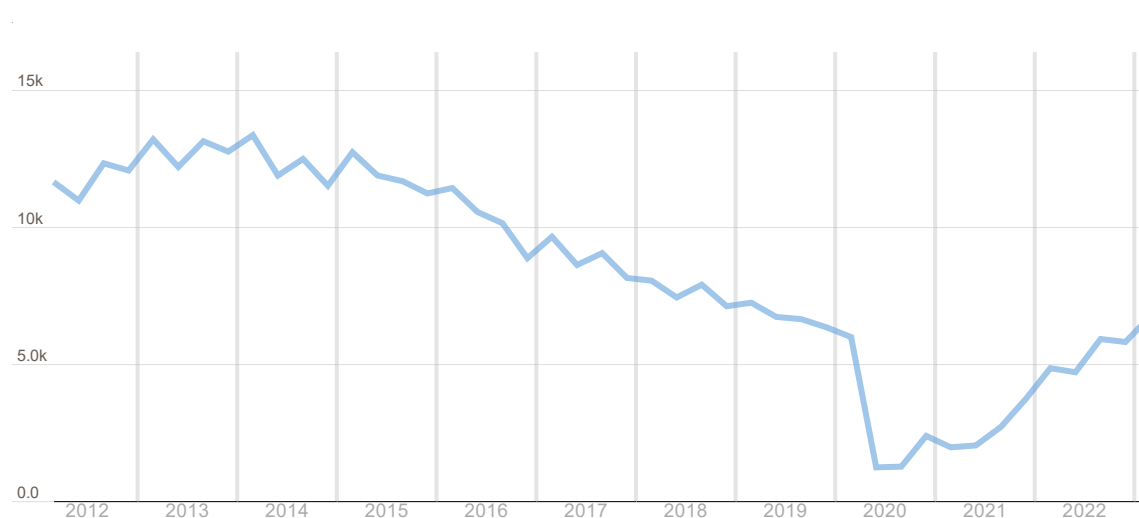
*Source: MOJ mortgage and landlord possession statistics*

The number of landlord claims against tenants for possession of their property fell gradually from 2014 to 2019, and then dropped sharply during the pandemic as evictions were banned.

Claims by social and private landlords in London fell from 5,980 in Q1 2020 to 1,960 in Q1 2021, before increasing again over the next two years to 6,740 in Q1 2023. Some of the recent increase may reflect the backlog in cases that built up during the pandemic, but it is also consistent with rising rents and increased reports of rent arrears as households deal with the cost-of-living crisis.

It is worth noting that not all claims end up resulting in court-ordered possessions (partly because some tenants move out before that point is reached).

Figure 6: Homeless households in temporary accommodation arranged by London boroughs

Number of households
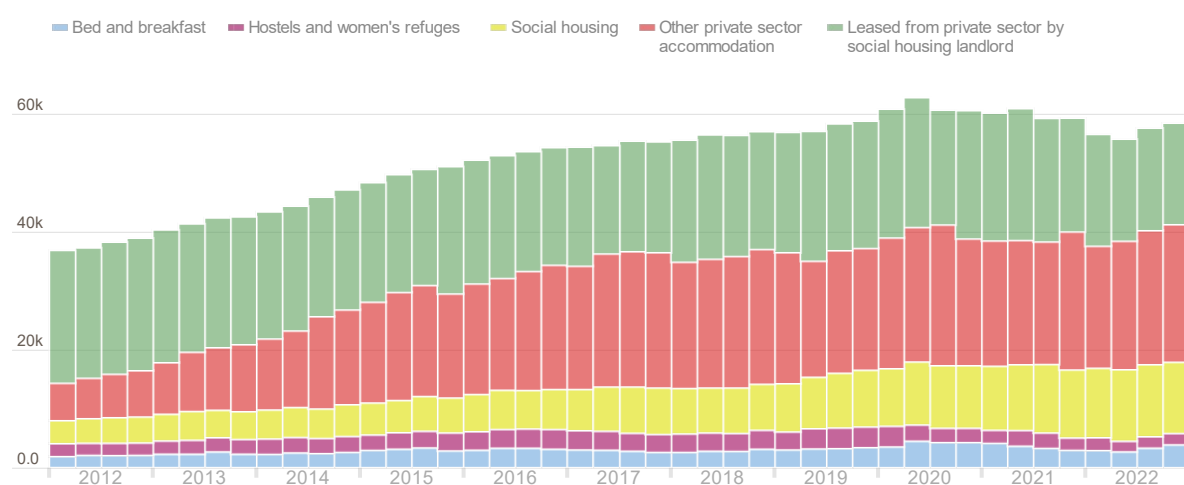
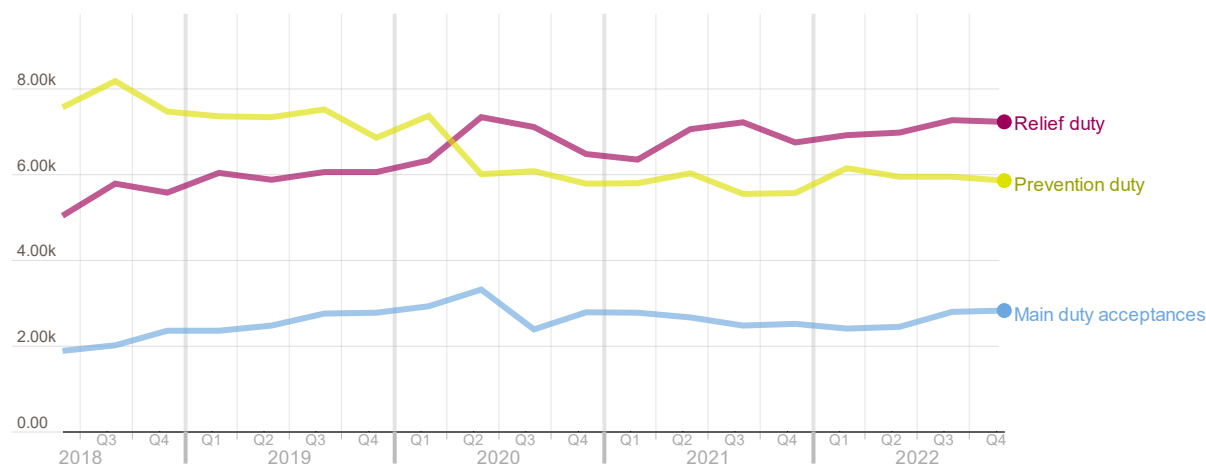*Source: DLUHC statutory homelessness local authority tables*

At the end of 2022, there were 58,370 homeless households in temporary accommodation arranged by London boroughs, down slightly from 59,200 at the end of 2021 but up from earlier in 2022.

38,480 of the households accommodated at the end of 2022 had children, with a total of 75,580 children between them.

The number of households in bed and breakfast (B&B) accommodation has risen sharply in the last year. At the end of 2022, there were 3,880 households in B&Bs, including 940 households with children (of which 480 had been in the B&B for more than 6 weeks). 12,090 homeless households were being temporarily accommodated in social housing at the end of 2022, a figure that has more than doubled since the end of 2015.

Figure 7: Homeless households assessed as owed a prevention relief or main duty in London

Number of households

Source: [DLUHC statutory homelessness local authority tables](#)

Under the Homelessness Reduction Act, a prevention duty is owed to households threatened with homelessness within 56 days and a relief duty is owed to households that are already homeless and require help to secure accommodation. The relief duty lasts 56 days, after which a household can be accepted as statutorily homeless and owed a main homelessness duty.

There were 13,070 households assessed as owed a new prevention or relief duty in London in Q4 2022, including 5,840 prevention and 7,220 relief duties. The number of households owed a prevention duty has fallen since the onset of the pandemic, while the number already homeless and owed a relief duty has risen.

There were 2,820 households accepted as owed a main homelessness duty by London boroughs in Q4 2022, the highest figure since 2020.

Analysis by the GLA shows that Black and Mixed ethnicity households in London are made homeless at a significantly higher rate than Londoners from other ethnic backgrounds. For example, between 4% and 5% of Black and Mixed ethnicity households in London were homeless and living in temporary accommodation in 2019-20, according to official figures. The average share across all ethnic groups was 1.6%.

CITY INTELLIGENCE

Figure 8: People seen sleeping rough in London for the first time
Number of people
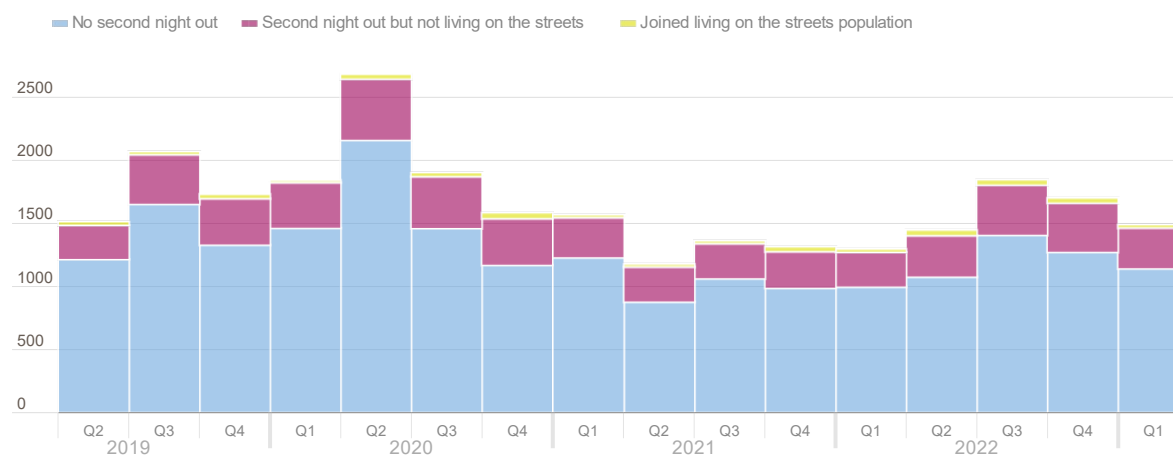
Source: GLA CHAIN quarterly rough sleeping reports

In the first quarter of 2023, outreach teams recorded 1,490 people sleeping rough in London for the first time, down from the previous quarter but up from Q1 2022. This figure peaked at 2,680 in Q2 2020, immediately after the first national lockdown was announced.

1,138 of the new rough sleepers seen in Q1 2023 spent only one night sleeping rough, while 323 were recorded sleeping rough for more than one night but not considered to be living on the streets. 29 people were judged to have joined the population living on the streets.

10: INCOME, POVERTY & DESTITUTION

This chapter covers the related concepts of income, poverty and its most extreme form – destitution. These issues are fundamental to the wellbeing of Londoners, so information on them is central to many of the Mayor's strategies, including the Equality and Diversity Strategy, the Health Inequalities Strategy and the Fuel Poverty Action Plan. They are also critical issues for the Partnership Board as set out in Building a Fairer City, and in the Board's missions which include creating a Robust Safety Net and Helping Londoners into Good Work.

Further information and other related measures can be found on the London Datastore, particularly the Economic Fairness pages.

The notion of "income" used in this chapter is a household measure, counting income from all sources for all members of the household (earnings, benefit income, pensions, investment and any other income).

The definition used here is equivalised net income after housing costs. This allows us to compare the income available to people living in different types of households after paying direct taxes (income tax and National Insurance) and basic housing costs (including rent, mortgage interest, Council Tax and water bills). This is sometimes referred to as disposable income.

The indicators look at the distribution of income and income inequality, which can be defined as the difference between incomes at the higher and lower ends of the distribution or as the difference in income between different groups of the population. They also look at a measure of average or "typical" weekly income for a couple with no dependent children, i.e., median income.

Income Inequality

Figure 1: Income inequality, London and Rest of UK, 2019/20-2021/22

Difference in weekly income (after housing costs) between top 10% and bottom 10%
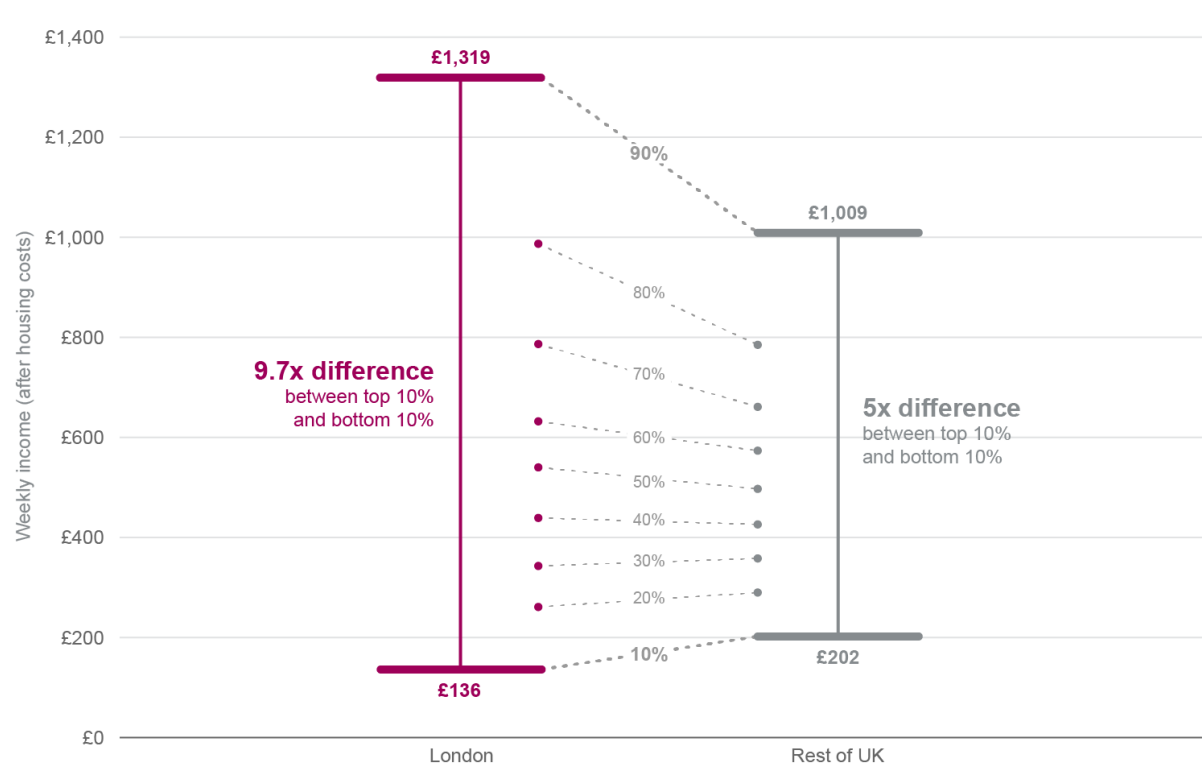
Source: DWP Households Below Average Income (HBAI)
Note Regional data for 2020/21 are not available due to issues with the underlying Family Resources Survey, so this is an average of the two remaining time points with increased uncertainty compared to previous estimates.

While it is often perceived that incomes in London are high, "typical" incomes are just a little higher in London than elsewhere in the UK. Median equivalised income after housing costs for a couple in London was £540 per week for 2019/20-2021/22[30], compared to £497 for the rest of the UK.

Income inequality within London is stark, with the richest tenth of Londoners having almost ten times the income of the poorest tenth.

Incomes for Londoners at the lowest decile are 30% below those at the lowest decile for the rest of the UK, while incomes at the highest decile are 30% higher. Overall, the ratio of income at the top decile to bottom decile (known as the 90:10 ratio) is 9.7 for London, nearly twice the ratio for the rest of the UK (5.0).

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[30] Regional data for 2020/21 are not available due to issues with the underlying Family Resources Survey, so this is an average of the two remaining time points with increased uncertainty compared to previous estimates.

Figure 2: Median disposable income and income inequality, London

Weekly Disposable Household Income After Housing Costs (AHC), London (£)
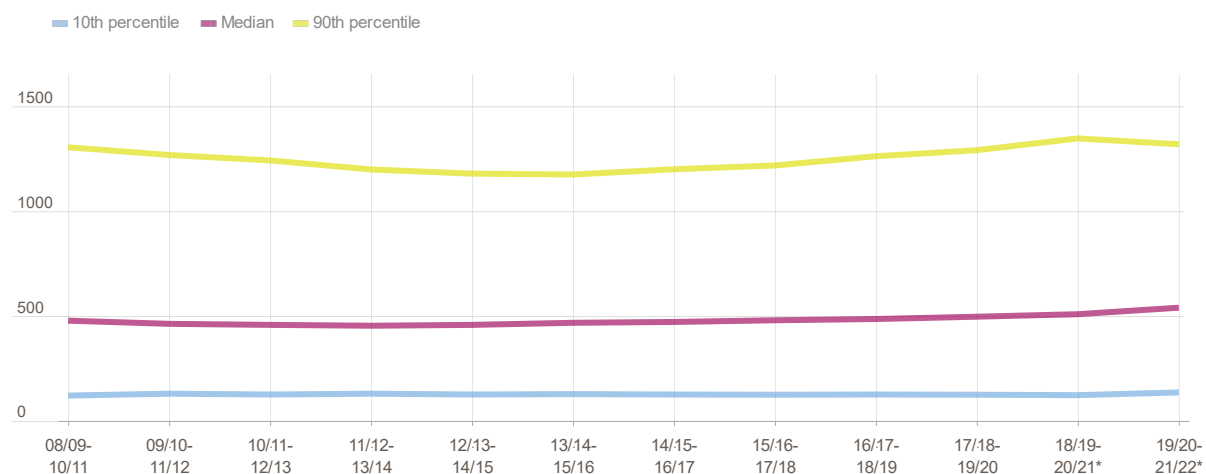
Source: [DWP, HBAI](link) 3-year average[31] median equivalised income AHC indexed to 2021/22 prices

Income after housing costs at the lowest decile in London has been fairly stable in real terms for more than a decade, ranging between £121 and £130. The latest estimate is marginally higher, at £136, but has more uncertainty.

Income for the highest decile fell from over £1300 to below £1200 between 2011/12 and 2015/16, but has risen again in more recent years, so that the income ratio of the highest to lowest decile fell from 10.8 to 9.2, before rising again to over 10. The ratio for the latest estimates is 9.7.

Poverty

Poverty is defined in terms of low income rather than savings or other assets. Relative poverty means being in a household with income below 60% of UK median income. This is the most robust measure, as it captures all income sources and covers the entire household population. However, the data are annual and lagging, and have increased uncertainty for recent years due to issues with collecting survey data during the pandemic (see footnote below).

Administrative data on means-tested benefits can be used to give a more timely proxy. Data on Universal Credit (UC) claims can be combined with data on Housing Benefit (HB) claims to provide a broader view, although some people are still moving across to Universal Credit from other, older legacy benefits. Universal Credit is only available for claimants of working age and their families. For people over state pensionable age on low income, Pension Credit and Housing Benefit are the main sources of welfare support.

As well as means-tested benefits and relative poverty, this section looks at persistent poverty. Persistent poverty is defined as living in a low-income household in the

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[31] London data for 2020/21 are not available, so the estimates including that year are averages of the two remaining time points

latest year and at least two of the previous three years. People in this situation are least likely to be able to participate fully in society and achieve a healthy lifestyle.

More timely survey data are presented on how Londoners feel they are coping financially, and an outcome of material deprivation for children and for pensioners.

Figure 3: Working age London Households on means tested benefits
Households claiming one or both of the two main means-tested benefits in London
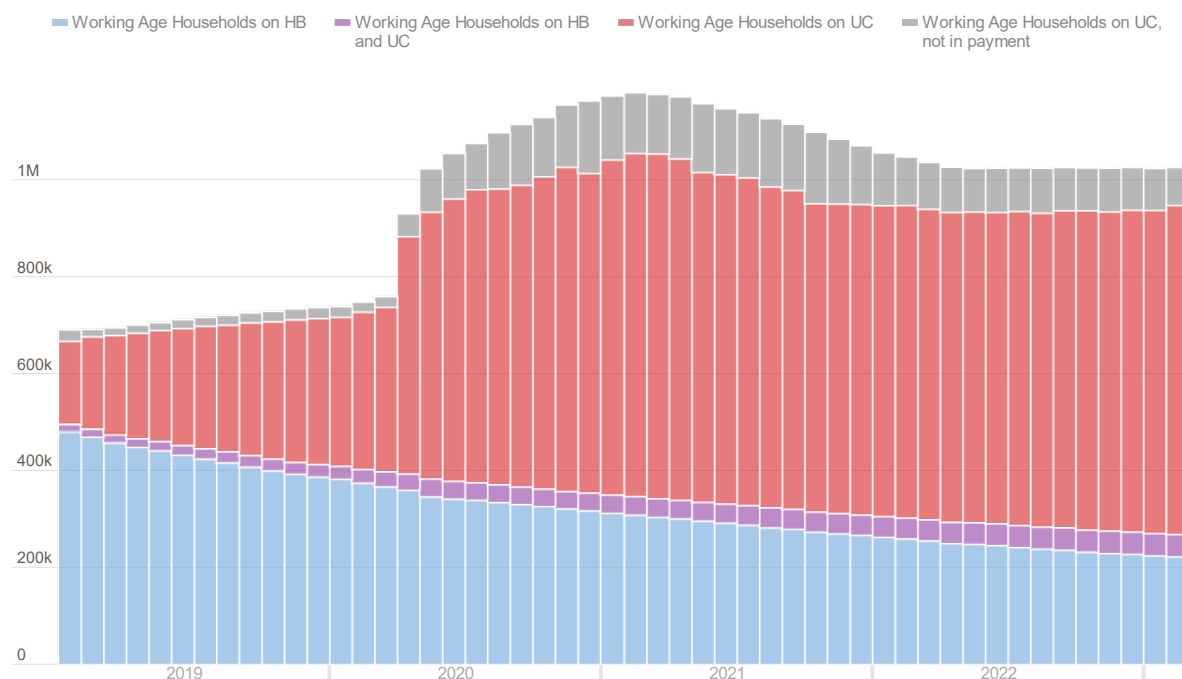
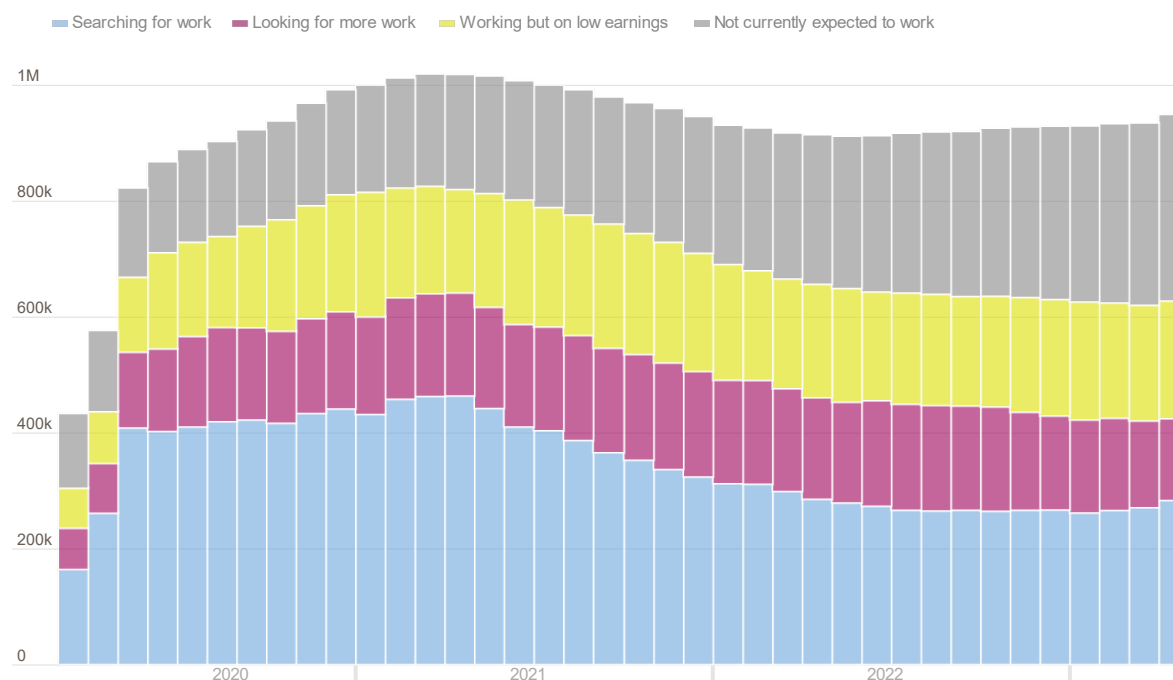*Source: DWP Benefits data via Stat-Xplore*

As of February 2023, there were just over a million households in London with working age adults claiming one or both of the two main means-tested benefits, with around 950,000 receiving a payment. These numbers have been fairly stable since the end of the Coronavirus Job Retention Scheme in Autumn 2021. Within that total, the number claiming Housing Benefit (HB) is reducing over time. Almost half of claimants are single without children, while a third are lone-parent families.

Around 38,000 London households had their payments capped[32], more than half of them single-parent households. This total is down from over 60,000 London households in March 2021, most notably falling when the £20 UC uplift ended in October 2021.

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[32] November 2022 is latest data available.

Figure 4: Londoners claiming Universal Credit by work status

Summarised work conditionality status of people on Universal Credit, Mar 2020-Apr 2023

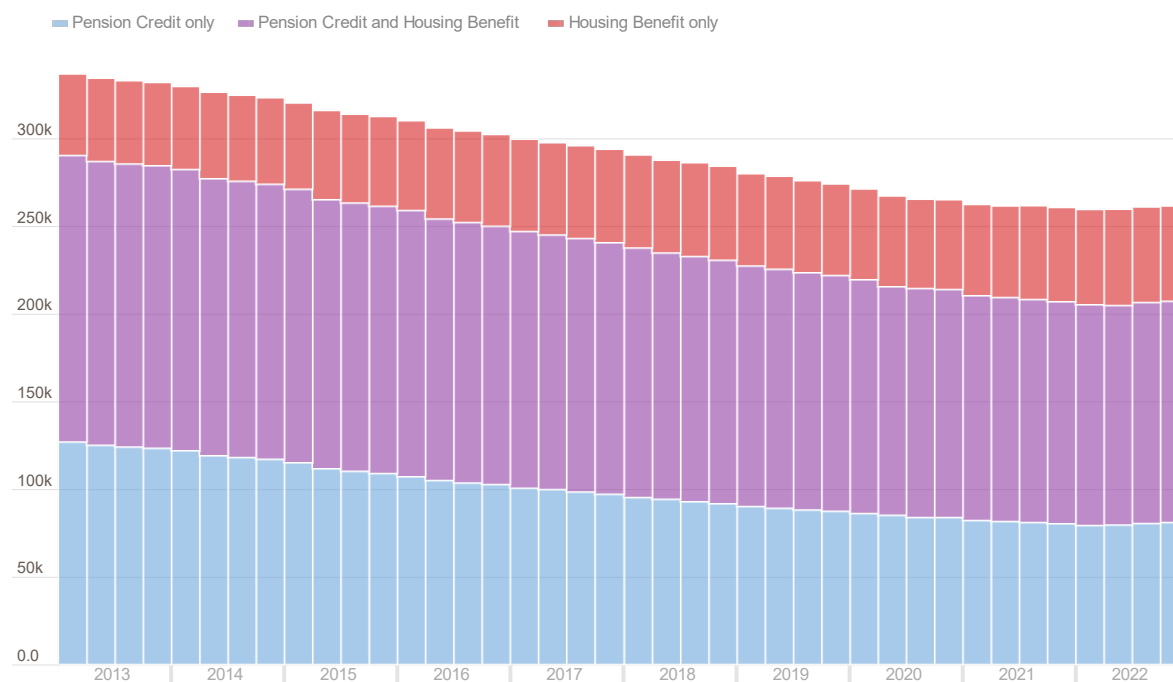*Source: [DWP Benefits data via Stat-Xplore](#)*

The reduction in the total number of Universal Credit claimants in London seen to mid-2022 has reversed and has been creeping up over the last year. Within this, the balance of conditionalities has changed, with slowly rising numbers out of work and searching for work[33], while fewer are seeking additional work in recent months.

The number of UC claimants not expected to work is still increasing, which likely reflects a change to the benefit system, rather than a real increase in the numbers of Londoners in this group.

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[33] This is only part of the count of unemployed Londoners. See the Economy and Labour Market Chapter. Those claiming the new style Jobseeker's Allowance have either savings or higher household incomes.

Figure 5: Pensioners claiming means tested benefits

Residents in London over state pensionable age claiming Pension Credit or Housing Benefit

Source: DWP Benefits data via Stat-Xplore

People over state pensionable age (SPA) can claim Pension Credit (PC), rather than UC. For some of those claiming also on behalf of a partner, the partner is below SPA.

The numbers claiming one of these benefits have reduced over nearly two decades, not only because of the rise in pensionable age, decreasing from almost a third of all pensioners[34] in 2013 to a quarter in 2022.

Most recipients of PC get an amount to top up their overall income to a guaranteed level. Fewer than 50,000 have additional savings or pensions that increase the amount of pension credit they receive. Many also receive Housing Benefit (HB), but not all receive a State Pension. Fewer than 55,000 claim HB but not PC.

Three in five PC claimants are women, but just 4% have a partner, whereas 30% of male claimants had a partner.

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[34] All people of state pensionable age on the DWP database receiving at least one benefit, which may include State Pension.

Figure 6: Relative poverty in London

Percentage of people living in London households with income below 60% contemporary median – After Housing Costs (AHC)
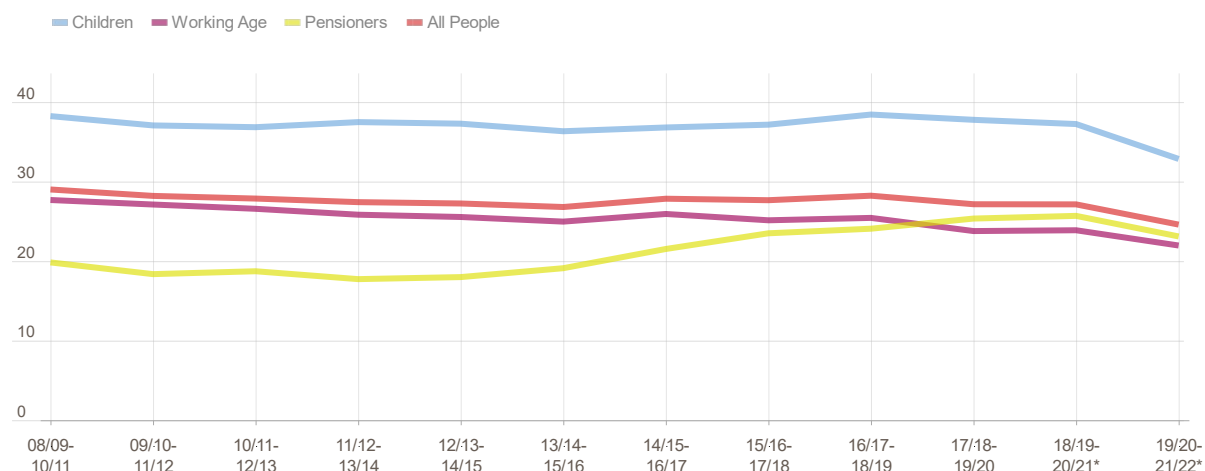
Source: DWP Households Below Average Income

Relative poverty decreased slightly in London over 25 years, but fell more significantly in the latest estimate (25% of the population live in households with less than 60% of the national median income after accounting for housing costs). That is the lowest percentage in London since the measure was introduced in the mid-1990s. This represents 2.2 million Londoners living in poverty, the lowest number for almost a decade, but still higher than at any time before the financial crisis. Because of issues with the underlying data, there is increased uncertainty around the latest estimates.

The 2019/20-2021/22[35] estimate is the first year since 2000 that London does not show a higher poverty rate than every part of the UK, with the West Midlands and the North East showing an increase in poverty (to 27% and 25%, respectively)[36].

The proportion of children living in poverty in London has been consistently higher than anywhere else in the UK, but the latest estimates show a drop to 33% in London and increases in some regions. The child poverty rate also decreased in Inner London but remains as high as in any other region (38%).

Poverty rates among pensioners in London had been climbing prior to the pandemic but also show a sharp drop in the latest estimate. Pensioner poverty rates for London remain substantially higher than for any other region.

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[35] Regional data for 2020/21 are not available, so the estimates including that year are averages of the two remaining time points

[36] Due to difficulties conducting surveys during the pandemic, there is greater uncertainty in all estimates quoted here, so it is not possible to say for certain whether the changes reported are genuine

Figure 7: Persistent poverty

Percentage in persistent poverty after housing costs (2017-2021)
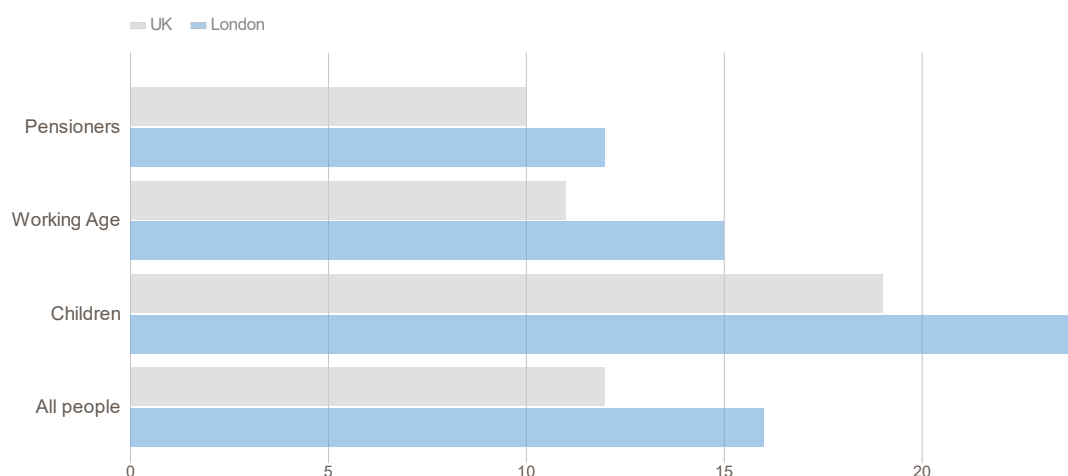

Source: DWP Income Dynamics

One in six Londoners were classed as in persistent poverty between 2017 and 2021.

In London, three in four children in poverty are in persistent poverty – or 24% of all children (500,000). This is much higher than in the UK as a whole, and this pushes the proportion of all people in persistent poverty in London well above the national average.

The proportions of working-age and pensionable-age Londoners in persistent poverty have been fairly stable over time but remain above national levels.

Figure 8: Struggling financially

Percentage of people in different financial situations, London quarterly data shown Jan 22-Apr 23
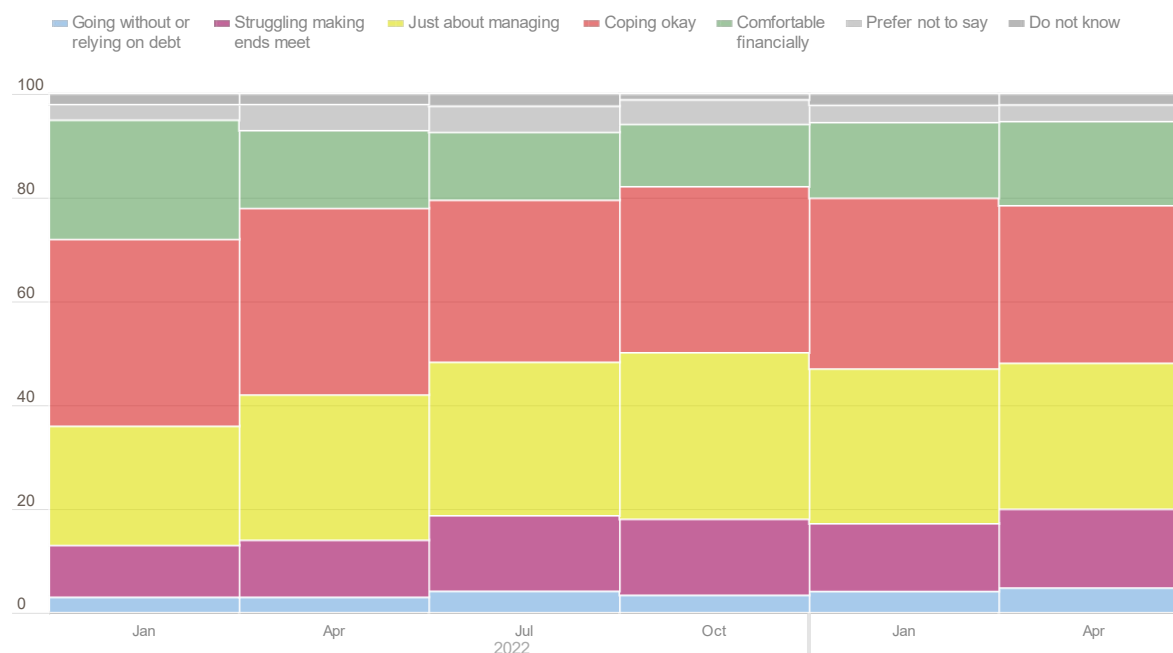
Source: YouGov survey January 2022 – April 2023

All figures, unless otherwise stated, are from YouGov Plc for the GLA. Total sample sizes were between 1080 and 1245 adults. The surveys were carried out online. The figures have been weighted and are representative of all London adults (aged 18+).

When asked how they were coping financially in April 2023, 47% of Londoners said they were coping okay or comfortably. This is up from around 40% in summer 2022, but still below levels from early 2022.

One in seven (15%) said they were struggling, with a further 5% not able to manage, going without or relying on debt to pay for their basic needs, while 28% were just about managing. These proportions vary each month, but there are no clear trends since the numbers struggling or going without increased over the first half of 2022.

Higher income groups, homeowners and those living with family or friends were most likely to be comfortable financially or coping okay, whereas around a third of Londoners whose activities were considerably limited by a health condition or disability, renters and Black Londoners said that they were going without or struggling.

Around 46% of adults paying rent or mortgage had fallen behind or struggled, rising to over 60% of those with income below £40,000. Close to half of Londoners have also fallen behind or struggled with household bills or credit payments.

Figure 9: Material deprivation among children

Percentage of children who experience material deprivation and low income by region
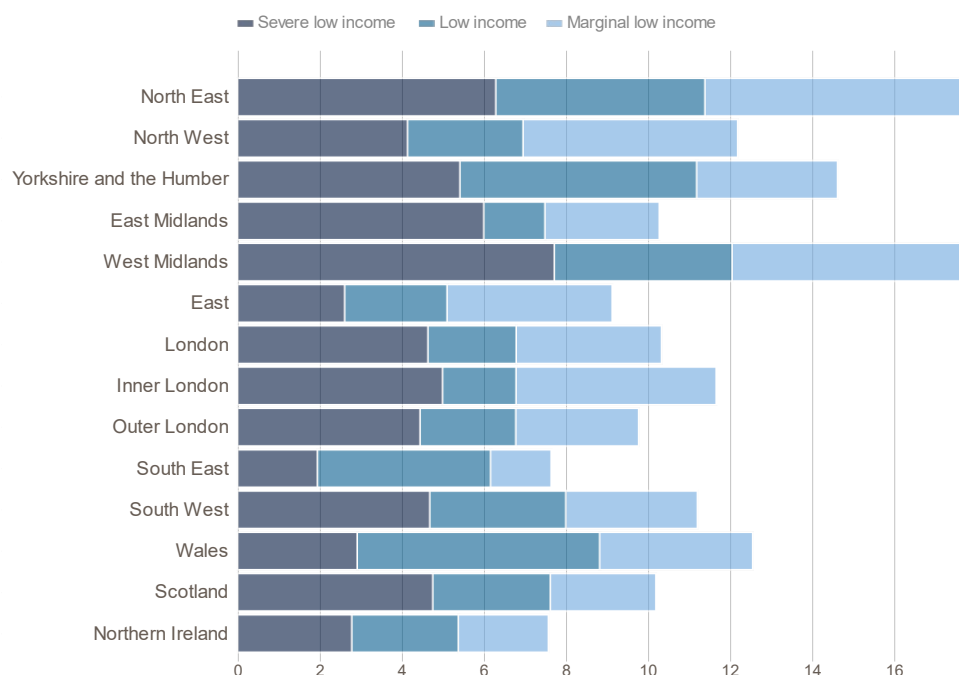
Source: DWP Households Below Average Income 2019/20-2021/22[37],

Another facet of poverty is when people cannot afford the goods and services that indicate a minimum acceptable norm in society; this is described as material deprivation.

For children, such items include fresh fruit and vegetables, outdoor space to play, school trips and a winter coat, not being able to heat the home, or replace broken items such as a fridge. Not being able to afford about five from a list of 21 items is counted as material deprivation.

At one in nine, the proportion of London's children estimated to be in material deprivation and living in a household with low income (before housing costs) is a little lower than in previous years, and has particularly fallen for Inner London, from 17% to 12%.

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[37] Regional data for 2020/21 are not available, so the estimates including that year are averages of the two remaining time points

Figure 10: Material deprivation among older people
Percentage of pensioners in material deprivation by region (2019/20-2021/22[38])
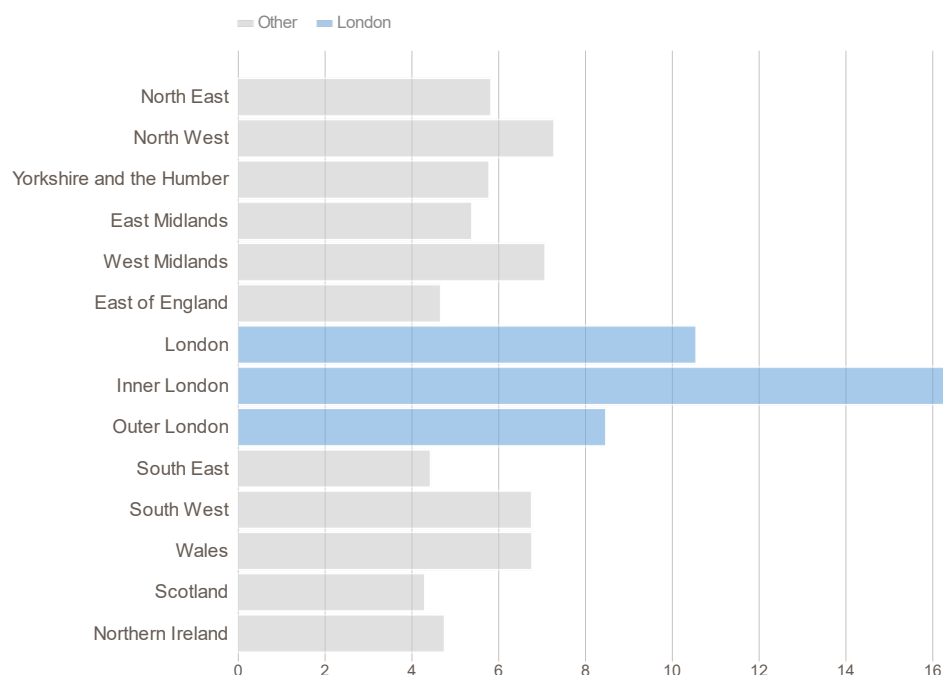
Source: DWP Households Below Average Income, DWP

Material deprivation is defined differently for pensioners. The list of minimum acceptable items includes heating the home, having a warm coat, having hair done regularly and seeing friends or family once a month. Not being able to afford, or not being able to take part for health reasons or having no-one to help them with goods or services for more than about three of a list of 15 items is counted as material deprivation.

Material deprivation is and has been much more prevalent among pensioners in London than in other parts of the UK. The rates have always been higher in Inner than Outer London, but even the Outer London rates exceed those elsewhere in the UK.

Destitution

The Joseph Rowntree Foundation (JRF) adopted the definition of destitution to mean going without the essentials we need to eat, stay warm and dry, and keep clean.

The various aspects of this are therefore food to eat, shelter to stay dry, and energy to stay warm (which also provides the water to keep clean). Shelter, in terms of homelessness and rough sleeping, are discussed in the chapter on housing. This section looks at:

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[38] Regional data for 2020/21 are not available, so the estimates including that year are averages of the two remaining time points

- fuel poverty, where the costs of keeping warm are balanced against income.

- food insecurity, meaning that at times a person's food intake is reduced and their eating patterns are disrupted due to affordability concerns.

- personal insolvencies, which is an indicator of the extent to which individuals have unmanageable debt.

Figure 11: Fuel poverty

Percentage of households in fuel poverty, London and England 2010 to 2022
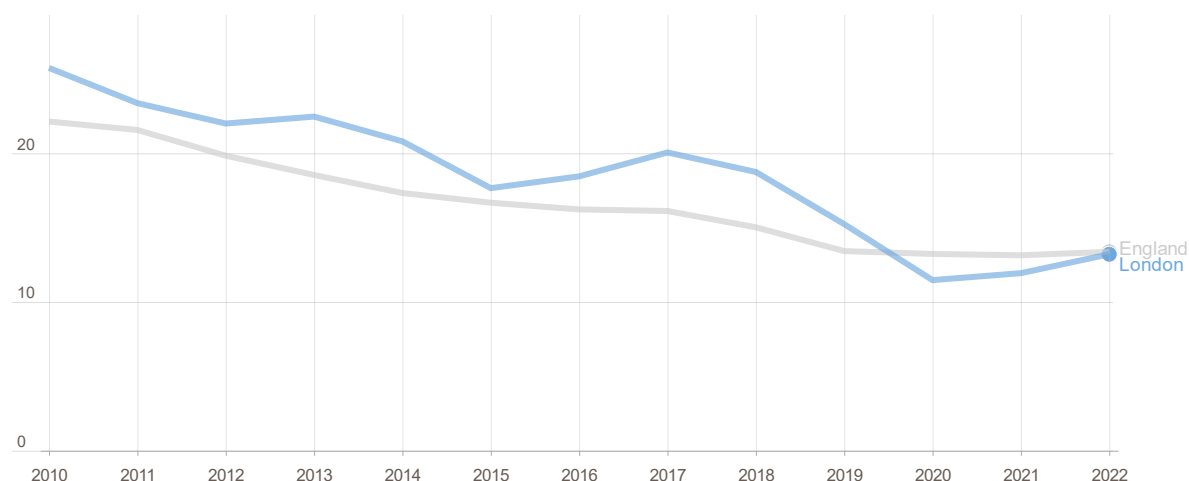
Source: BEIS Low Income, Low Energy Efficiency dataset

Note: Prior to the 2019 data release, fuel poverty was defined on the basis of Low Income High Costs. This new definition replaces the previous dataset.

How fuel poverty is measured has changed over time. The latest official definition used by BEIS refers to low-income households that are in low energy efficiency housing. By this measure, fuel poverty had been decreasing over the decade from 2010, but has been stable since 2020 nationally. Having fallen below the national level in 2020[39], fuel poverty is thought to have increased in London to match the national estimate for 2022[40].

While this measure does not vary greatly with changes in energy prices, changes in fuel costs, even after accounting for the Government's energy price support schemes, hit people living in low-income households the hardest, particularly those living in rented accommodation.

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[39] There is increased uncertainty in the data due to issues and restrictions carrying out the English Housing Survey during the pandemic in 2020 and 2021.
[40] Data for 2022 are calculated as a projection, incorporating observed changes in energy efficiency installations, income changes and announced energy prices.

Figure 12: Food security

Percentage of households with differing levels of food insecurity
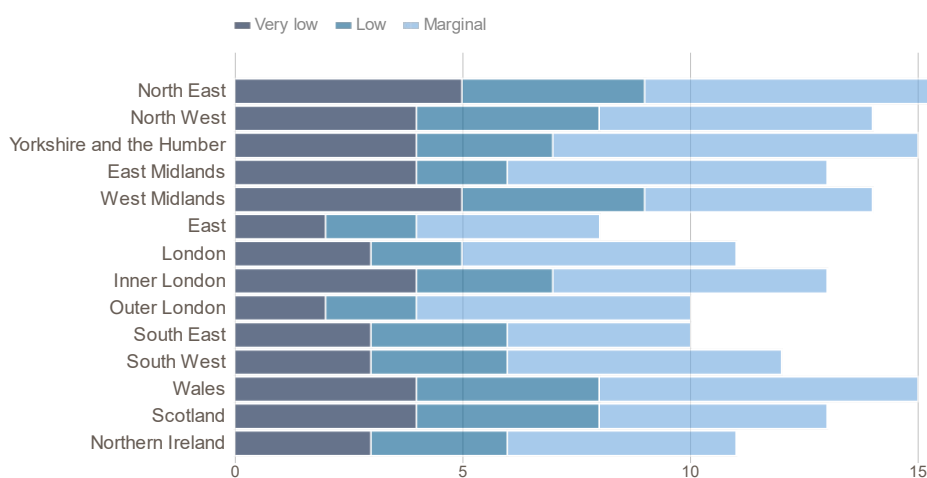
Source: DWP Family Resources Survey 2021/22

Although 89% of households in London had high food security[41] in 2021/22, 5% were classed as food insecure (either low or very low food security). The North East and West Midlands regions had the highest levels of food insecurity (9%)[42]. Outer London matched the East of England in having the lowest levels of households with very low and low food insecurity during 2021/22.

The 2021/22 Survey of Londoners found that around one in six (16%) adults in London had low or very low food security at some time in the last year, down from one in five in 2018/19. The drop may be attributed, at least in part, to the extraordinary measures, including furlough and the uplift to Universal Credit, put in place during the COVID-19 pandemic. The groups most likely to be food insecure include single parents, Londoners reliant on cash and social renters (all around 40%). One in eight food insecure Londoners had collected a food parcel from a food bank in the previous 12 months.[43]

In April 2023, 18% reported that they had regularly (8%) or occasionally (10%) gone without food or essentials over the previous six months, with a further 15% struggling to pay for these every time or relying on outside support.[44]

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[41] The Family Resources Survey asks a series of questions about access to food over the last 30 days to derive this measure. Difficulties conducting the survey during the pandemic means that there are higher levels of uncertainty with the figures than usual.

[42] Rounded figures are used, so figures shown in the chart may not sum to those quoted.

[43] https://data.london.gov.uk/dataset/survey-of-londoners-2021-22

[44] YouGov Plc. Total sample size for April was 1080 adults. Fieldwork was undertaken between 28th April – 3rd May 2023. The survey was carried out online. The figures have been weighted and are representative of all London adults (aged 18+) https://data.london.gov.uk/dataset/gla-poll-results-cost-of-living-2022

Figure 13: Debt and Personal insolvencies

Insolvencies per 10,000 population
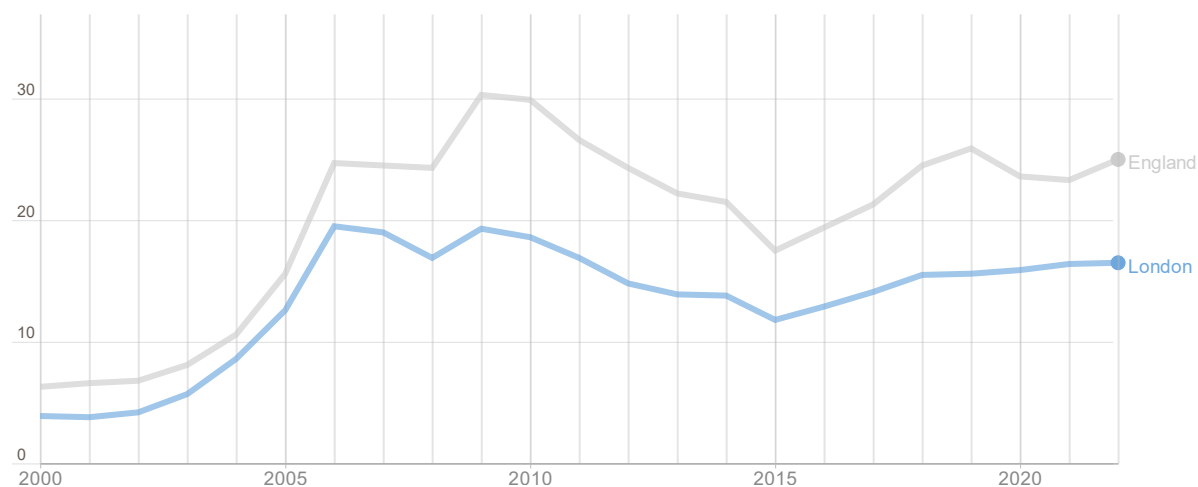
Source: Insolvency Service

When people are in debt and cannot repay what they owe, then there are different legal arrangements that could be made. Together, these are called personal or individual insolvencies. They fall into three categories: Individual Voluntary Arrangements, Debt Relief Orders and Bankruptcy.

There were 11,372 individual insolvencies in London during 2022, or one in 600 adults - far lower than in any other region of England and Wales.

While London had lower rates for all three categories of insolvencies than other regions, other sources show that London had higher percentages in arrears on household bills.

11: TRANSPORT & DIGITAL INFRASTRUCTURE

This chapter covers the state of London's transport and digital infrastructure and changes in travel patterns since the pandemic.

The transport section draws mainly on summary indicators from the 'Travel in London' (TiL) report, an annual publication by TfL which provides trends and developments relating to transport and travel in London. It focuses on those indicators that form part of a data-led tracker that TfL developed to monitor the aims of the Mayor's Transport Strategy (MTS) in the context of a different baseline following the pandemic.

The digital infrastructure section examines availability of high-speed internet services in London and ability to access the internet, which are key objectives of the Digital Access for All mission. For more information on the availability of broadband services in local areas, see the London Connectivity map.

Public Transport demand and mode share

Figure 1: Demand for public transport

Number of daily journeys by bus and Tube on the TfL network
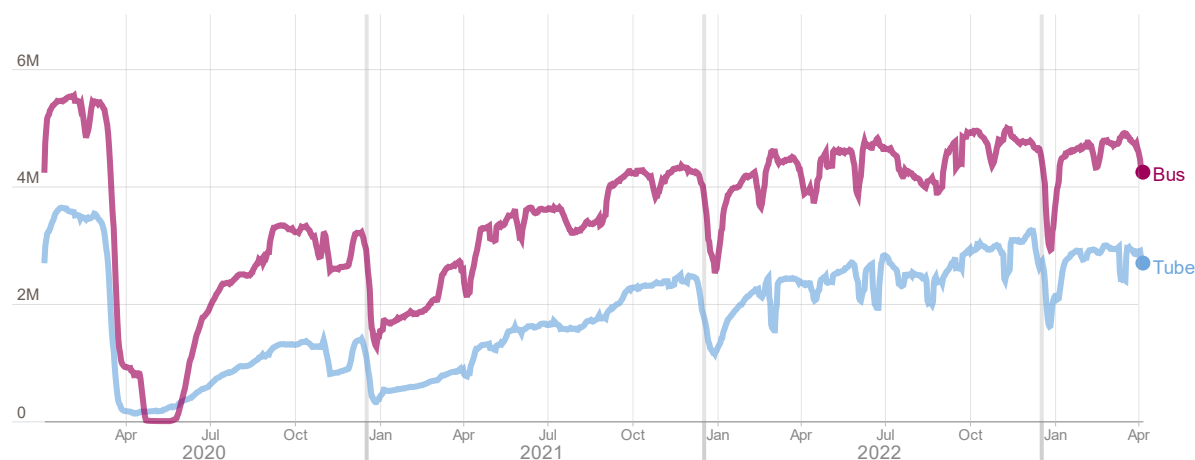
Source: TfL. Note: See the Resilience Dashboard for the latest data. For more detailed data, see the TfL Network Demand dashboard.

Demand has flattened in the first few months of 2023, after a steady rise during 2022 following the COVID-19 pandemic. As of March 2023, demand was 85-90% of pre-pandemic levels on buses, and 85% on the Tube, of pre-pandemic demand[45].

The broad relativities between the modes established during the pandemic seem to have persisted for most of the recovery so far, with more recent data points

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[45] Annual MTS update, 2023

suggesting a strong recovery of London Underground use, which is closing the gap with buses and the overall trend for public transport demand.

Figure 2: Active, efficient, and sustainable travel
Proportion of trips by active, efficient, and sustainable travel
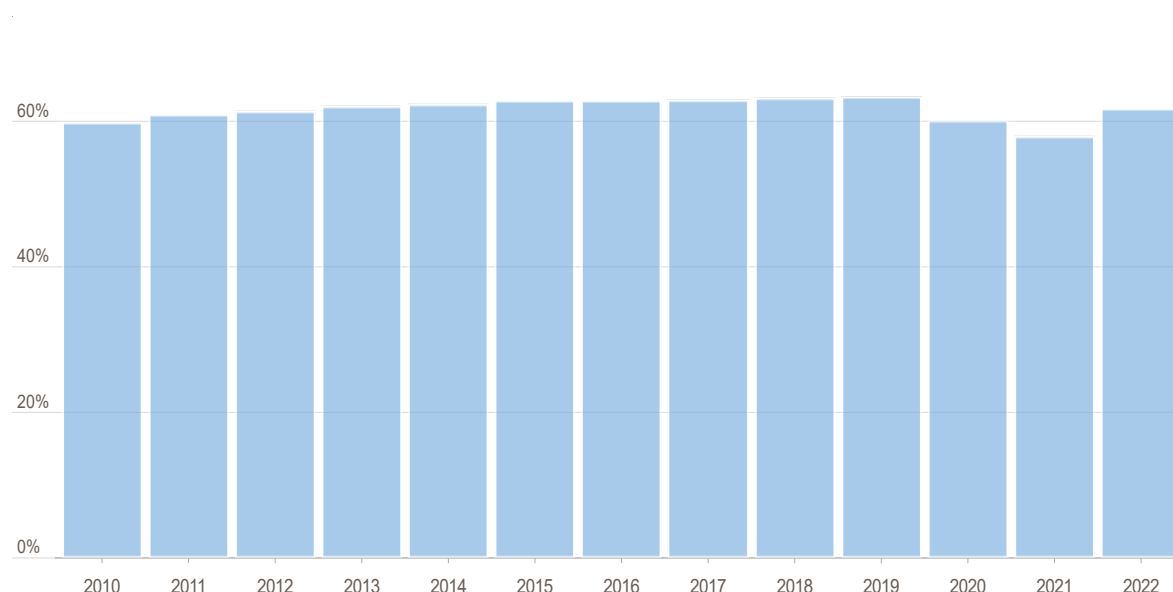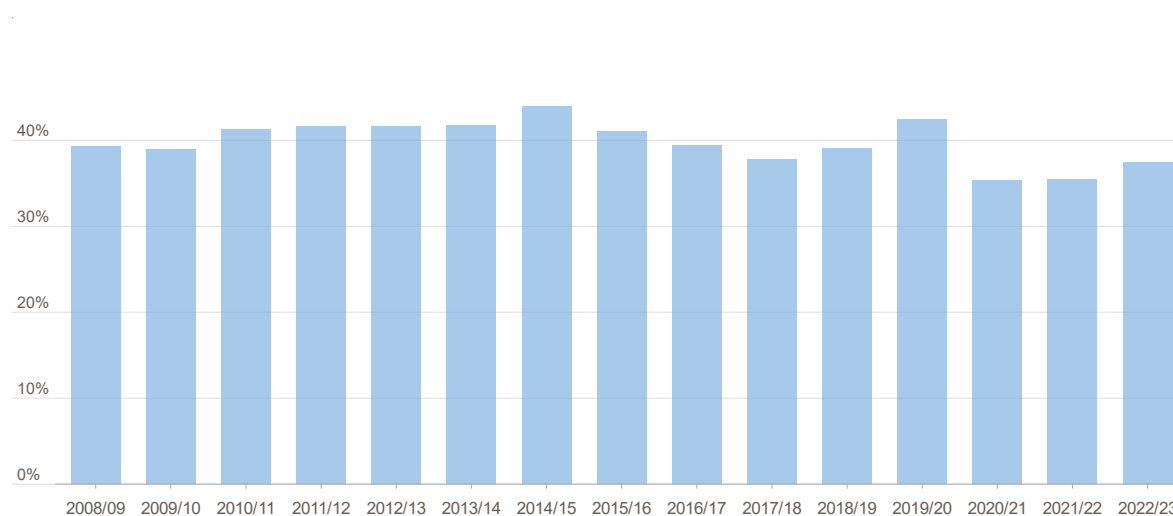

Source: TfL MTS Tracker

Before the pandemic, the proportion of all trips in London made by active, efficient, and sustainable modes (public transport, walking or cycling) was increasing steadily over time, with 63% of all trips in 2019 made by these modes. This was mostly due to consistent growth in public transport use (primarily rail and Tube).

During 2020 and 2021, the active, efficient and sustainable mode share metric declined due to the pandemic. This decrease was primarily driven by a fall in public transport trips, but this was partially offset by a slight increase in walking/cycling. In 2022, the active, efficient and sustainable mode share began to recover towards levels seen before the pandemic, reaching an estimate of 61.5%. This increase was driven by more public transport trips, whereas the walking/cycling mode share remained similar to the level seen in 2021.

Active travel

Figure 3: Active travel
Proportion of Londoners aged 20 and over who achieve at least 20 minutes of active travel per day

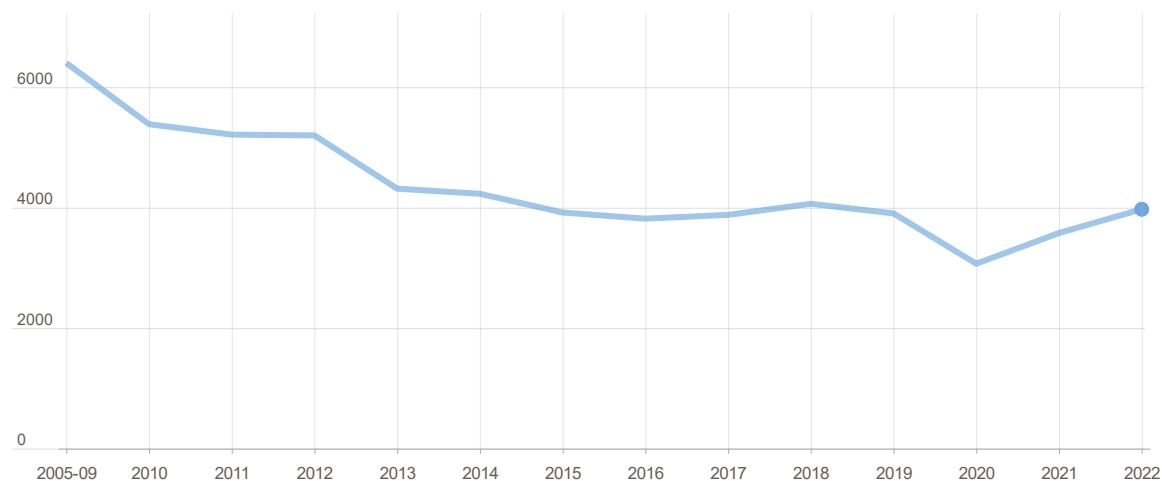*Source: TfL MTS Tracker. 2022/23 data point includes Q1 & Q3 22/23.*

Active travel is a good way of building exercise into people's daily routines to maintain good health and wellbeing. The historic trend for Londoners who achieve at least 20 minutes of active travel per day prior to the pandemic was relatively flat, with around 40% of Londoners on average achieving this benchmark.

Data suggests that the proportion of Londoners achieving 20 minutes of active travel per day decreased during the pandemic, with 35% of Londoners aged 20 and over achieving above the recommended benchmark during 2020/21 and 2021/22. Data for 2022/23 suggests that this metric has increased slightly to 37%.

Safety on transport

Figure 4: Road traffic collisions
Number of people killed or seriously injured (KSI) in road traffic collisions

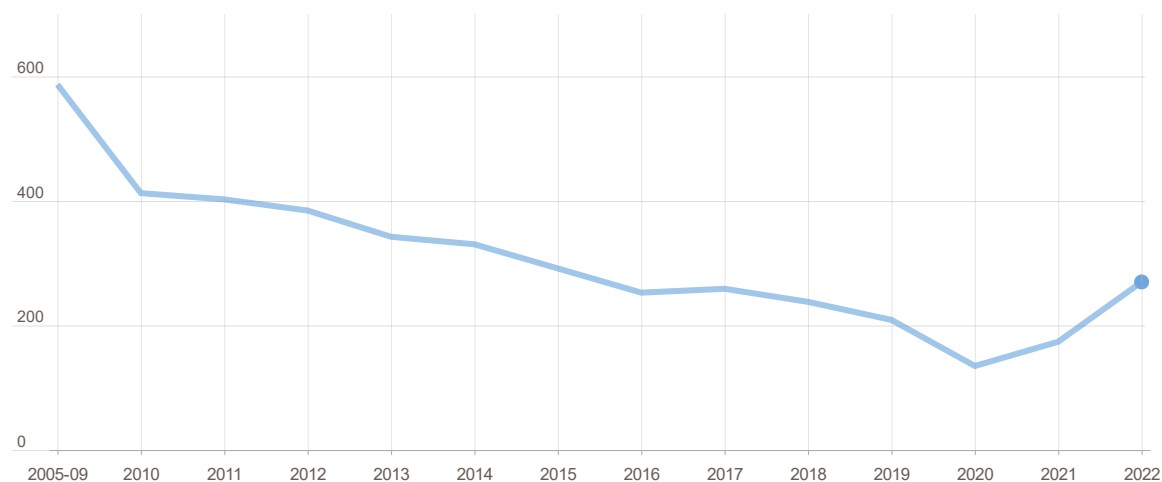*Source: TfL MTS Tracker. For more detailed data, see the Road safety data reports. 2022 data point is provisional, pending publication.*

Historically, the number of people killed or seriously injured on London roads has seen a continual decline from the average for the period 2005-09 (the baseline set by TfL) to 2020.

In 2021 and 2022 (provisional data) there has been an increase in people killed or seriously injured on London's roads, compared with 2020. In 2022, data suggests there was a 38% reduction in the number of people killed or seriously injured (against a 2005-09 baseline).

Figure 5: Safety on the bus network
Number of people killed or seriously (KSI) injured by a bus

Source: TfL MTS Tracker. For more detailed data, see the Road safety data reports. 2022 data point is provisional, pending publication.

CITY INTELLIGENCE

The number of people killed or seriously injured involving buses has also seen a continual decline from the average for the period 2005-09 (the baseline set by TfL) until 2020.

In 2021 and 2022 (provisional data), there has been an increase in the number of people killed or seriously injured in or by a bus. Nevertheless, this represents a 54% reduction against the baseline.

Transport accessibility and affordability

Figure 6: Physical accessibility of the network
% reduction in relative additional journey time using the step-free network
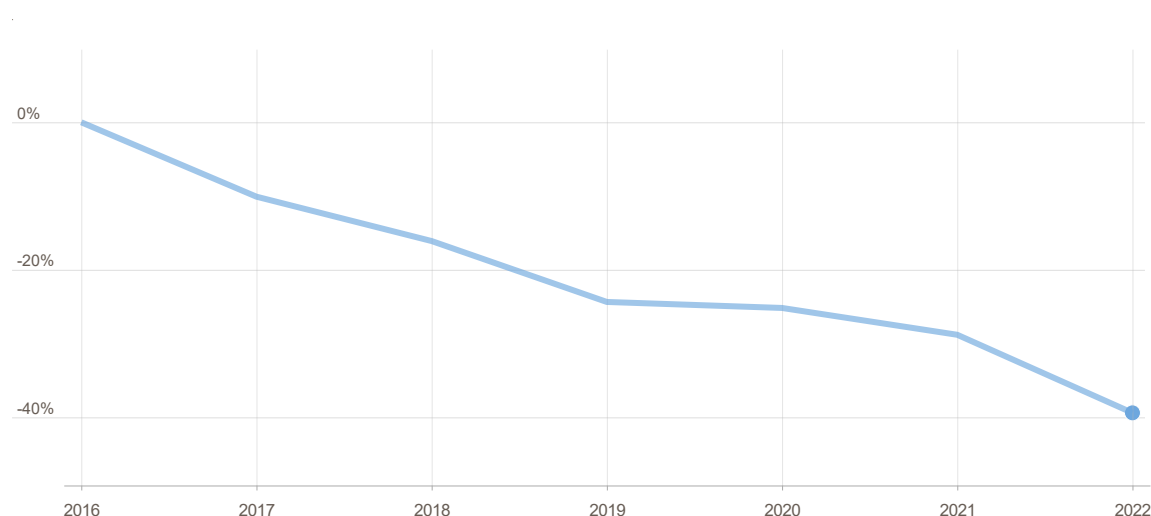
Source: TfL MTS Tracker. Estimate based on data released prior to 2021 census.

TfL measure the physical accessibility of the network by comparing, for all possible journeys using London's public transport network, the relative additional journey time that would be incurred on average when using only the step-free network against the time required if the whole network was available. TfL measures progress against this aim by tracking the per cent reduction in relative additional journey time.

In 2021/22, Moorgate London Underground station became step-free in May 2022, TfL opened Barking Riverside station (with step-free access) on the Overground in July 2022 and introduced 8 new step-free stations as part of the Elizabeth line. 52.7% of the rail network is now step-free[46].

The average additional journey time required to make a journey using only the step-free network has decreased by 39% in 2022 versus 2016.

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[46] TfL

Figure 7: Transport affordability

Household expenditure on transport, £

■ Transport services ■ Purchase of vehicles and operation of personal transport
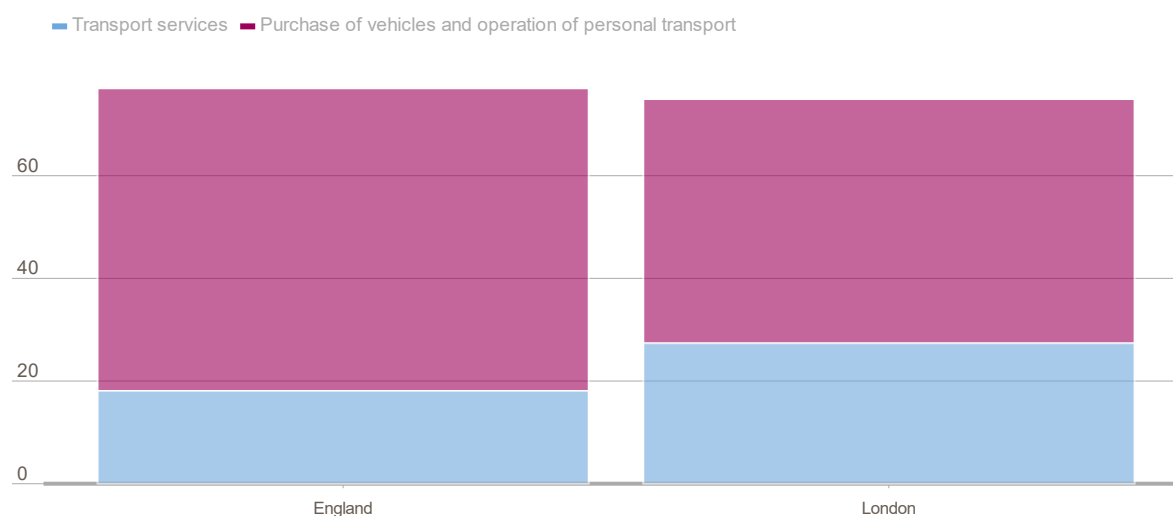
*Source: Living Costs and Food Survey*

The latest household expenditure data from the ONS (for 2021) shows that Londoners spend £27 per week on public transport (£18 is the average spend in England), the highest of any region in the UK. Londoners also spend the most on public transport, as a proportion of all household expenditure (4.1%), compared to 3.2% in England. However, the proportion that Londoners spend on public transport has fallen from its 2020 level of 4.9%.

The wider transport category includes spending on owning and maintaining a car. By including these costs, Londoners spend slightly less than the England average overall on transport (£75 vs £77 per week in 2021). Similarly, proportion-wise, Londoners spent the least on transport overall (11% of overall expenditure vs 14% England-wide) in 2021. In London, this proportion has dropped from 12% in 2020, whereas England-wide the proportion of costs spent on transport has remained stable, at 14% in 2020.

Transport quality

Figure 8: Bus service performance
Average Speed (mph)
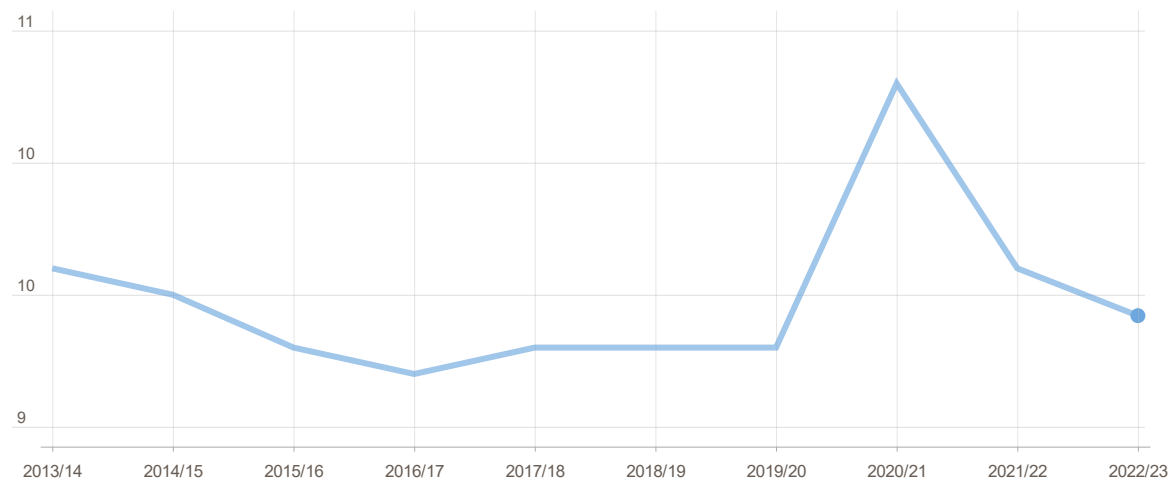
Source: TfL MTS Tracker.

TfL monitors bus network performance by measuring average bus speed, as well as comparing scheduled kilometres to kilometres operated.

In 2021/22 and 2022/23, bus speeds declined from the high point of 10.3 mph during the pandemic year 2020/21 (where general traffic demand was subdued) to 9.6 mph and 9.4 mph respectively. However, the metric remained higher than in 2019/20, perhaps reflecting a combination of the lasting impacts of restrictions, slightly reduced demand for car travel since the pandemic, and continuing investment in bus priority.

Figure 9: London Underground service performance
Scheduled and operated kilometres (millions)
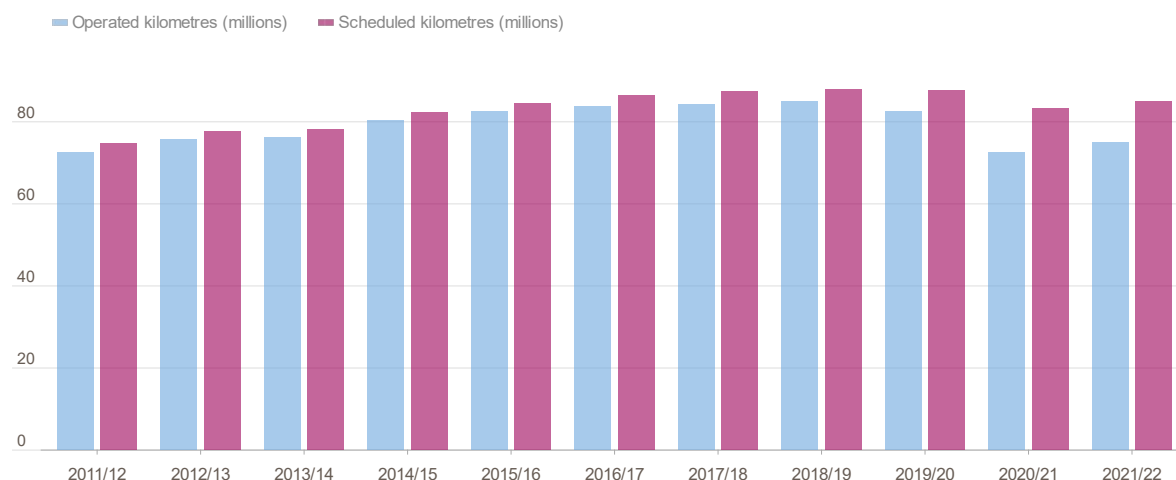
Source: TfL (2022) "[Travel in London 15](.)".

London Underground service provision in terms of scheduled kilometres grew steadily throughout the 2010s, rising from 74.6 million kilometres in 2011/12 to 87.7 million in 2019/20 before falling following the outbreak of the pandemic. In 2021/22 scheduled kilometres started to recover, increasing by 2% vs 2020/21 to 84.9 million.

Alongside this growth in supply, the percentage of scheduled kilometres operated improved in the first half of the decade before falling back, albeit still at relatively high levels.

The pandemic started to have an impact on service provision in March 2020 (end of financial year 2019/20), but provision has since started to recover. On an annual basis, operated kilometres fell by 12% between 2019/20 and 2020/21, before starting to recover in 2021/22 (increasing by 3% vs 2020/21).

Transport efficiency

Figure 10: Road traffic statistics

All motor vehicle traffic flows by area, 13-period rolling average, 2008/09-2022/23. Index: 2006/07=100
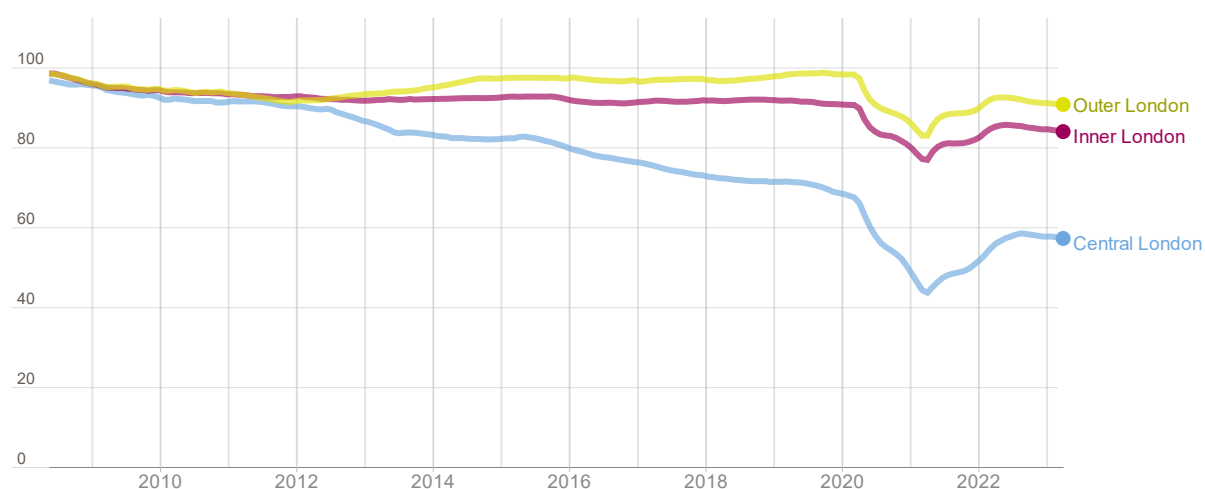
*Source: TfL. Note: Data shown above is monthly.*

The chart above shows motor vehicle traffic flows by area. The data shows the recovery from the effects of pandemic restrictions in early 2020, with traffic levels across all of London increasing gradually throughout 2021/22. Traffic flows then levelled off from April 2022 onwards.

Traffic flows in both Inner and Outer London in March 2023 are around 7 to 8% below pre-pandemic levels (February 2020), while flows in Central London are around 15% lower.

Digital Infrastructure

Figure 11: Full Fibre availability

% of premises able to access full fibre
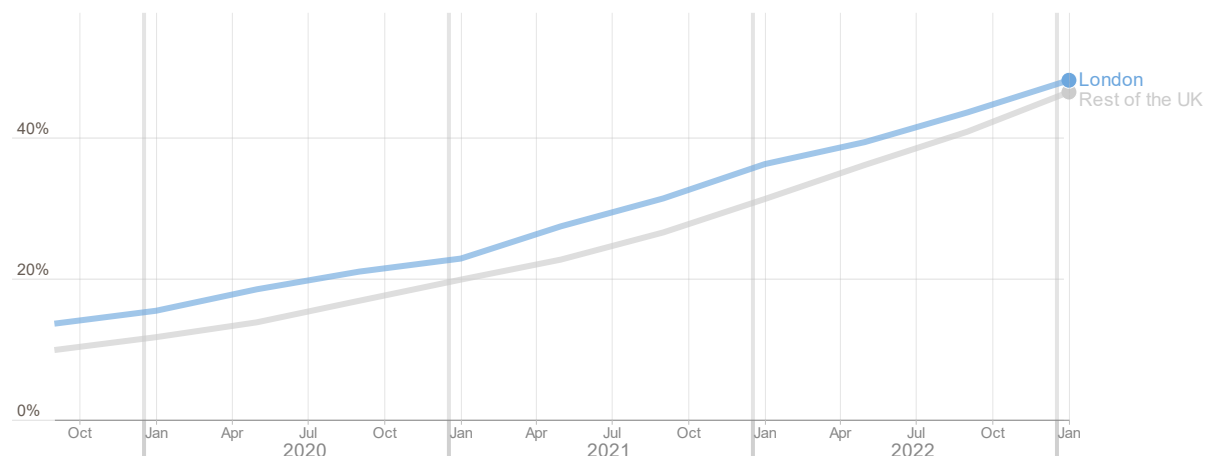
Fibre to the Premises (FTTP) is broadband that uses all fibre optic cabling to connect households to the internet, delivering gigabit capable download speeds (1 Gb/s). This is much faster than Fibre to the Cabinet (FTTC) broadband, which uses fibre optic cable only to a street cabinet, and then utilises copper cables that connect the cabinet to a property.

Full fibre broadband was available to 48% (or 1.9m) of premises (business and residential) in London as of January 2023, compared to 46% in the rest of the UK. Since January 2022, 487,000 more premises in London gained access to full fibre.

Figure 12: Superfast broadband unavailability

% of premises unable to access superfast broadband (speeds >30Mbit/s)
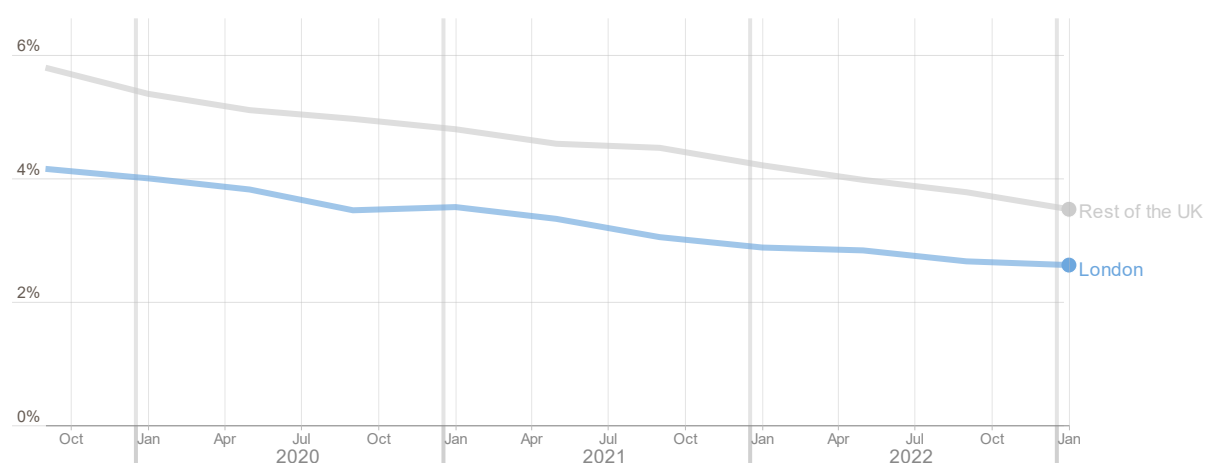
Superfast broadband is defined as offering speeds of 30Mbit/s or more. This allows users to download and make high quality video calls over wi-fi, access online TV and music streaming services, and have several people using the connection at the same time at home. As data consumption continues to increase, 30Mbit/s is increasingly regarded as a minimum requirement.

In January 2023, 2.6% of London premises were unable to access internet speeds of 30Mbit/s or more, compared to 3.5% for the rest of the UK. Both London, and the rest of the UK have seen a steady decrease in the percentage of premises that are unable to receive 30Mbit/s internet speed as networks have improved.

12: YOUNG PEOPLE & EDUCATION

This chapter reports on children and young people (aged 0-25 years). It sets out trends across a range of indicators, covering health and happiness, early years care, education, and safety.

The majority of the indicators covered in this chapter are updated annually with the exception of two, which are updated quarterly: the number of early years providers and perceptions of safety for children and young people.

The Mayor is championing inclusive education in London, and is working to tackle child poverty and health inequality across the city. The Health Inequalities Strategy provides more information on health inequalities for children across London.

Health and Happiness

Figure 1: Child mortality rate (1-17 years)

Child mortality rate per 100,000 between 2010-12 and 2018-20
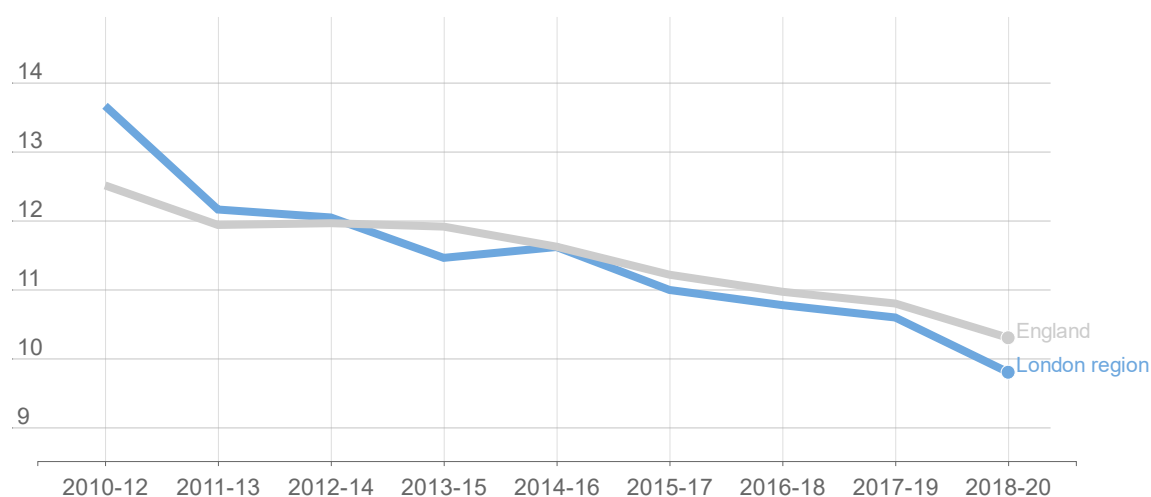
*Source: Office for National Statistics (ONS)*

The child mortality rate measures the rate of death due to all causes for persons aged 1-17 years. Across London, it stood at 9.8 per 100,000 between 2018 and 2020, which was marginally lower than the England rate (10.3 per 100,000).

London's mortality rate decreased by more points since 2010-12 (3.9 points) than England's (2.2 points).

Figure 2: Prevalence of obesity
Percentage of children in reception and Year 6 that are obese (including severe obesity)
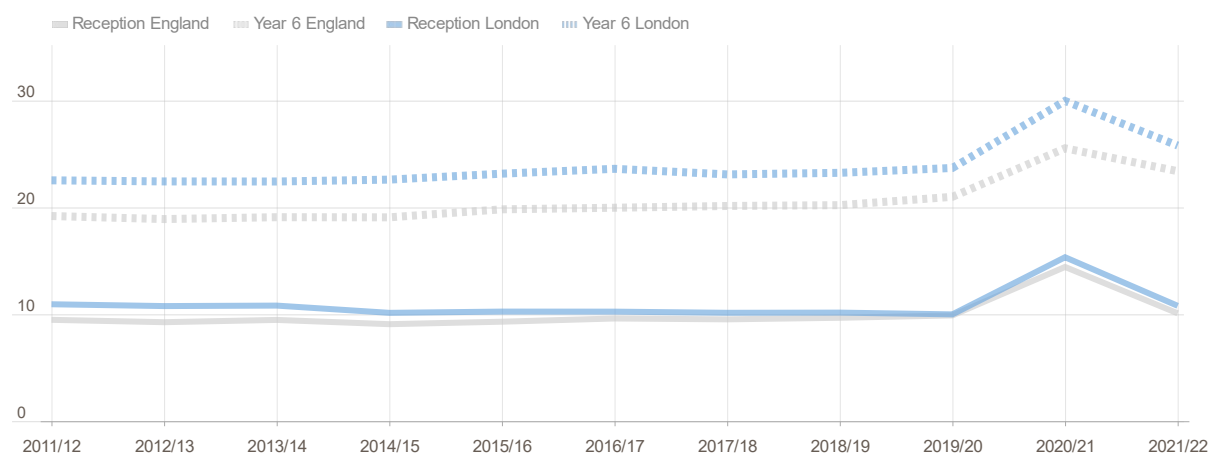

Source: NHS Digital, National Child Measurement Programme

As of 2021/22, 11% of London's reception children are classified as obese (compared to 10% for England), but this represents a drop from the rate in 2020/21 (15%). The prevalence of obesity in Year 6 during 2021/22 has been higher in both London and England, with London rates being higher (25.8%) than England's (23.4%).

Figure 3: Children's happiness with life as a whole
Children's mean happiness score for life as a whole between 2011-12 and 2020-21
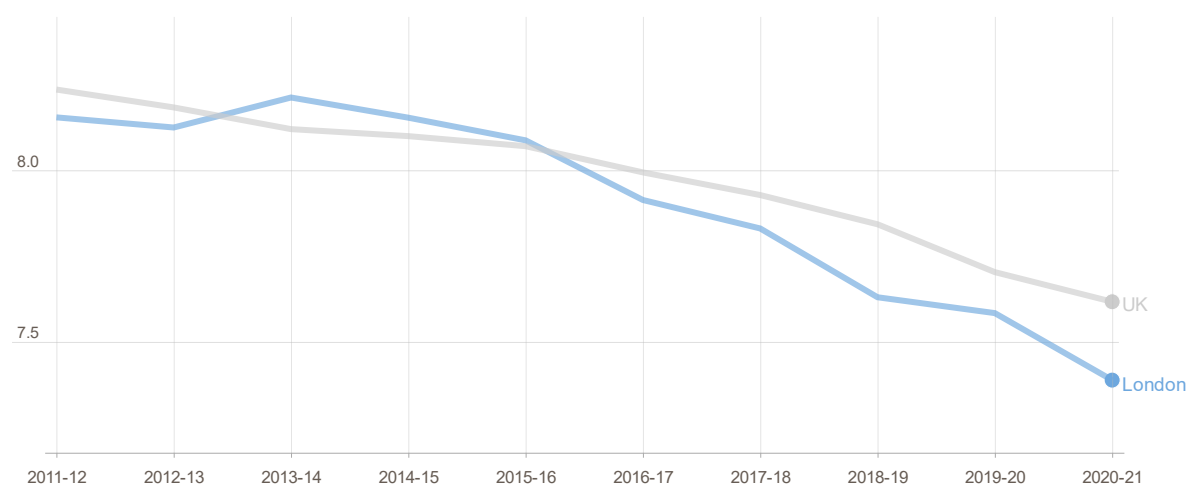
Source: Understanding Society Survey

The Understanding Society survey includes questions for 10-to-15-year-old children asking how they feel about their lives.

London children's mean happiness score decreased from 8.2 in 2011-12 to 7.4 in 2020-21. This is in line with national level data, where mean happiness scores also decreased since 2011-12.

Figure 4: Children under 16 living in low-income families, 2021/2022

Map showing the percentage of all children aged 0-15 living in low-income families across London wards

Legend:
- < 8%
- 8%-16%
- 16%-24%
- 24%-32%
- ≥ 32%
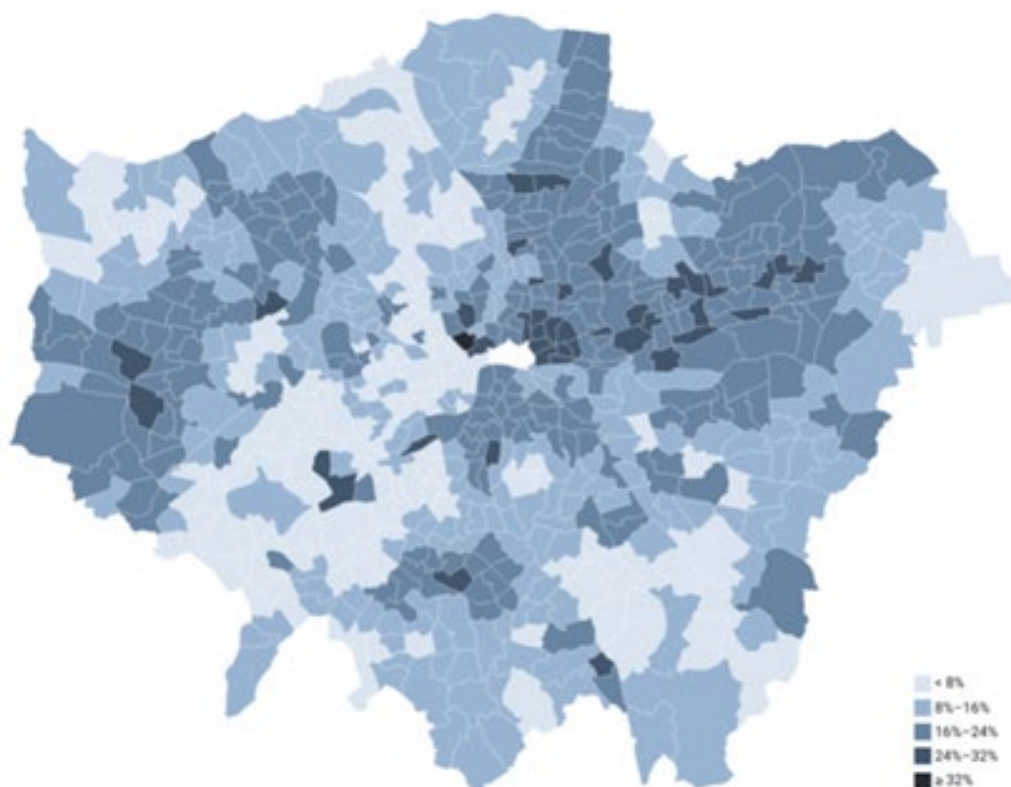
Source: Children in low-income families dataset, DWP, rates calculated as a percentage of GLA ward estimates of 0-15 age group

The percentage of children living in low-income families varies by ward and borough. The north east and west of London have a high concentration of children living in low-income families.

Overall, children are more likely to be in poverty than adults, with the latest estimate showing that 33% of London's children (~ 700,000) were in poverty for the period 2019/20 to 2021/22. While this is a decrease from the previous estimate (38%), the very low response rates for 2021/22 mean that estimates should be treated with caution. Across London, the number of children living in low-income families decreased by 9% between 2019/20 and 2020/21.

Early Years

Figure 5: Registered early years providers[47]

Number of registered early years providers across London in March and December between 2015 and 2022[48]
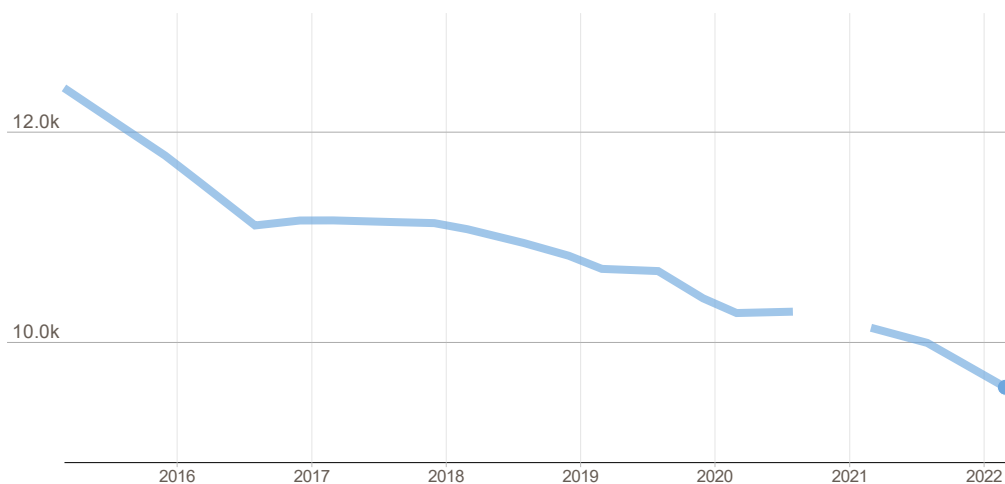
Source: Ofsted

The number of early years providers continues to decrease across the capital as a result of long-standing financial challenges and, more recently, the impact of COVID-19.

Between 2019 and 2022, there was an 11% decrease in the number of registered early years providers across London (from 10,695 to 9,569), compared to a 14% decrease across England (from 61,652 to 53,193).

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[47] The Early Years Register is for providers that care for children in the early years age group, from birth to 31 August following their fifth birthday. Registration is compulsory for these providers.
[48] Data was not collected for December 2020 due to COVID-19.

Figure 6: Children and places in 'good' or 'outstanding' settings in London

The percentage of children and places in 'good' or 'outstanding' settings in London between 2018 and 2022
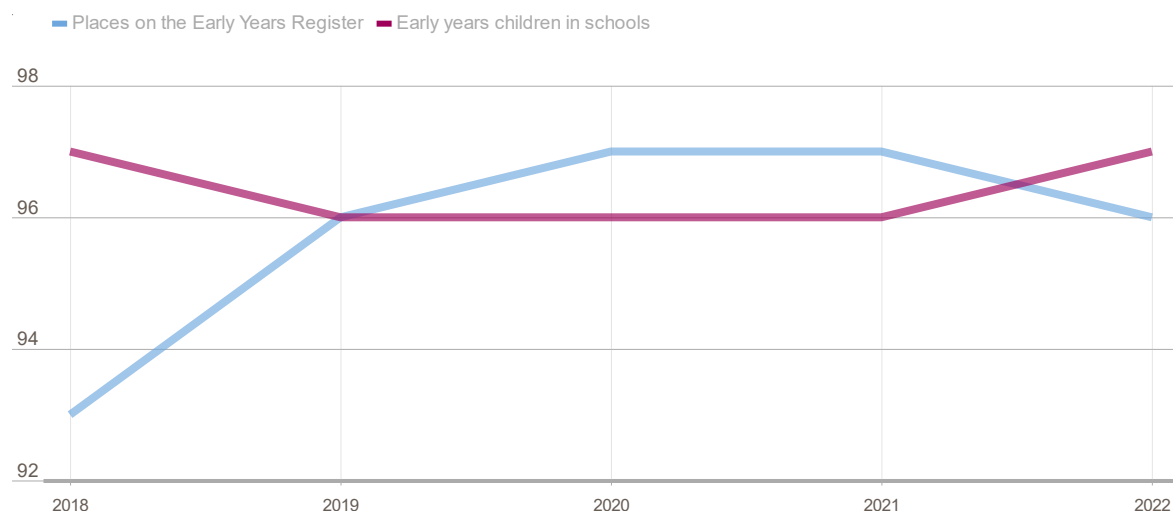
Source: Department for Education, Ofsted state-funded schools statistics and Ofsted early years and childcare statistics

97% of early years children in schools attend a setting which is 'good' or 'outstanding'[49]. 96% of places registered on the Early Years Register are in 'good' or 'outstanding' settings, which represents a 3% increase from 2018. The proportion in London which are in 'good' or 'outstanding' settings is the same as the rest of England.

Figure 7: Good level of development at age five

Percentage of children with a good level of development at age five between 2013 and 2021/22
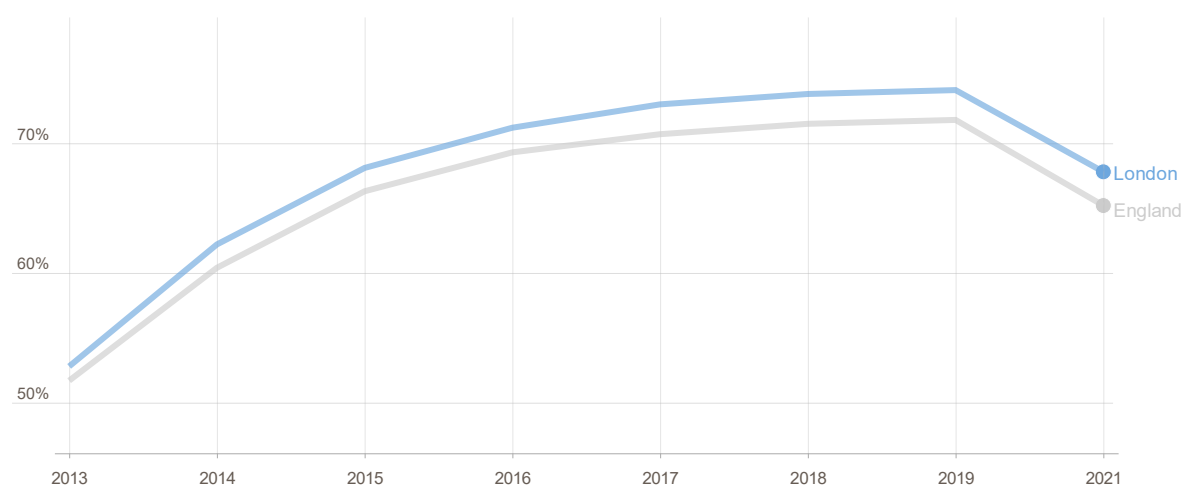
Source: Department for Education

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[49] Inspectors use a four-point scale to make judgements, outstanding, good, requires improvement and inadequate.

The 2021/22 data is the first since the early years foundation stage (EYFS) reforms were introduced in September 2021, and as part of these reforms, the profile was significantly revised, making year-on-year comparisons of assessment outcomes difficult[50].

Between 2013 and 2019, the percentage of children in London with a good level of development[51] at age five increased from 53% to 74%, remaining relatively unchanged between 2016 and 2019. This is broadly in line with England-wide trends.

Table 1: Percentage of Black and Chinese children in London with a good level of development at age five between 2013 and 2019

	2013	2014	2015	2016	2017	2018	2019	2022
Black children	53%	61%	67%	70%	71%	72%	70%	62%
Chinese children	54%	65%	73%	76%	80%	84%	82%	80%
Difference	**1%**	**4%**	**6%**	**6%**	**9%**	**12%**	**12%**	**18%**

Black children are less likely to have a good level of development at age 5 (62% in 2022) compared to other ethnic groups. The attainment gap between Chinese children (who have the highest achievement) and Black children increased by 17 percentage points since 2013 (see Table 1 above)[52].

In 2021/22, 68% of all children had a good level of development. Girls were more likely to have a good level of development (74%) than boys (62%). Those from a White ethnic group were more likely to have a good level of development (70%) than Black children (62%). For minority ethnic groups, 2021/22 data shows that the biggest gap was between Chinese (80%) and Travellers of Irish heritage (28%).

In 2021/22, children who are eligible for free school meals (FSM) are less likely to have a good level of development at age 5 (56%, compared to 70% for ineligible children).

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[50] https://explore-education-statistics.service.gov.uk/find-statistics/early-years-foundation-stage-profile-results/2021-22
[51] The percentage of children with a good level of development is defined as the percentage of children achieving at least the expected level in the prime areas of learning and in the specific areas of literacy and mathematics.
[52] The change in the attainment gap refers to Chinese and black children since 2013. However, in 2013 and 2014, mixed children were the highest achieving ethnic group (56% and 66% respectively). Black children are the lowest achieving ethnic group across all years.

Figure 8: Free Early Education Entitlement take up

Percentage of eligible children using at least part of their Free Early Education Entitlement between 2015 and 2022
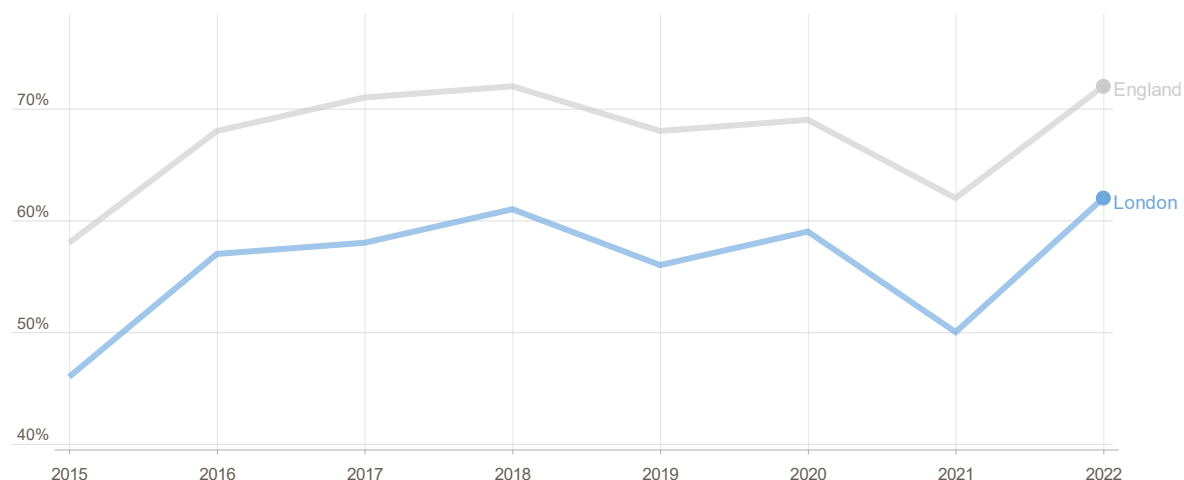
Source: Department for Education

A majority of eligible two-year-olds in London (62%) used at least part of their Free Early Education Entitlement (FEEE)[53], which is 10 percentage points lower than the England level (72%).

During 2020 and 2021, there was a 9 percentage point decrease in the number of eligible children using their FEEE, followed by an uptick between 2021 and 2022.

Figure 9: Mothers with dependent children in London who are in paid work

Percentage of mothers with dependent children in London who are in paid work between 2012 and 2022
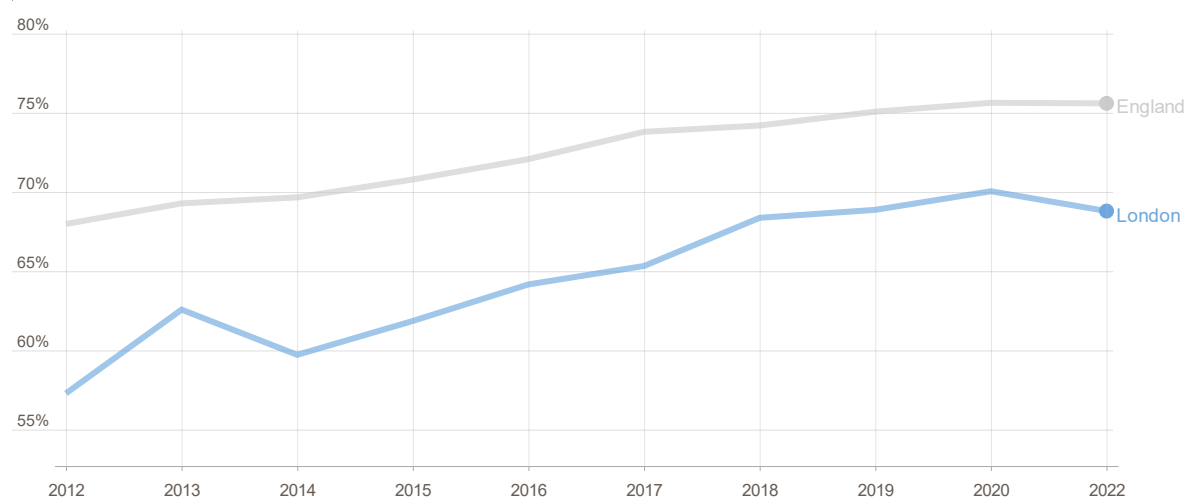
Source: Office for National Statistics

[53] A two year old is entitled to free childcare if their parent/guardian is in receipt of a range of benefits and/or a range of other characteristics such as if they are looked after by the local authority, get disability living allowance https://www.gov.uk/help-with-childcare-costs/free-childcare-2-year-olds
.

69% of mothers with dependent children in London are in paid work, compared to 76% across England. The percentage of London mothers with dependent children who are in paid work increased by 12 percentage points between 2012 and 2020. However, since 2020, the rates have dropped for both London (to 69%) and England (to 76%).

Key Stage 4

Figure 10: Standard 9-4 pass in English and Mathematics GCSEs

Percentage of pupils who achieved a standard 9-4 pass in English and Mathematics GCSEs between 2015-16 and 2021-22
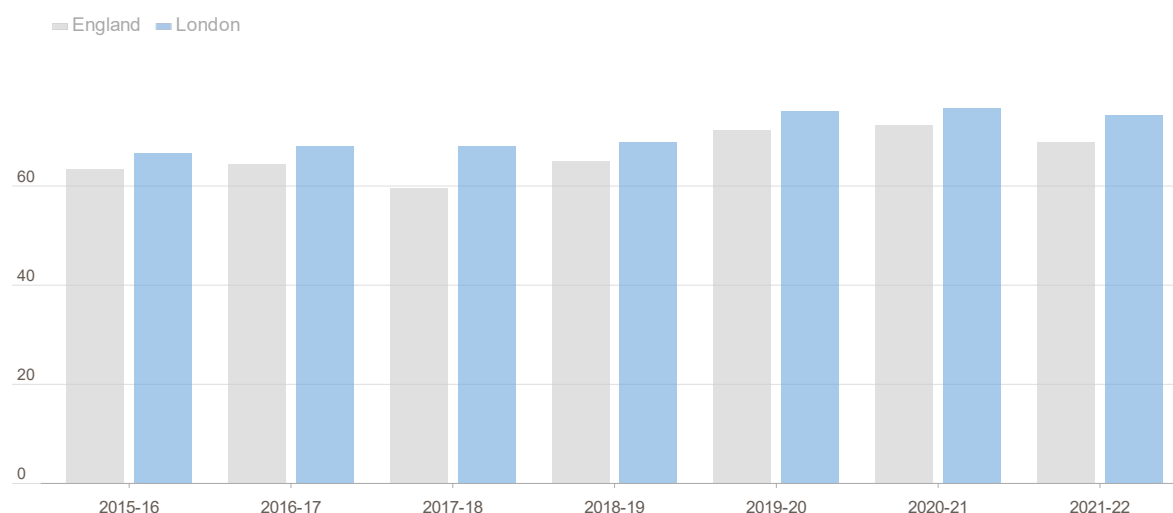
Source: Department for Education

London has a higher percentage of pupils achieving a standard 9-4 pass[54] in English and Mathematics compared to England (74% versus 69%).

Since 2015-16, the percentage of pupils achieving a standard pass in English and Maths increased across London by 7.7 percentage points (compared to a 5.5 percentage point increase across England).

A lower percentage of black (70%) and mixed pupils (71%) achieved a standard pass in English and Maths compared to other ethnic groups (with Chinese pupils being the highest achievers (91%)).

61% of disadvantaged pupils achieved a standard pass in English and Maths in 2021-22, compared to 80% of non-disadvantaged pupils.

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[54] The highest grade that can be achieved is 9 (this is equivalent to an A* under the old grading system) and a 4 is a standard pass (this is equivalent to a grade C at GCSE under the old grading system).

Figure 11: Average Attainment 8 score

The average Attainment 8 score per pupil in London and England between 2015-16 and 2021-22
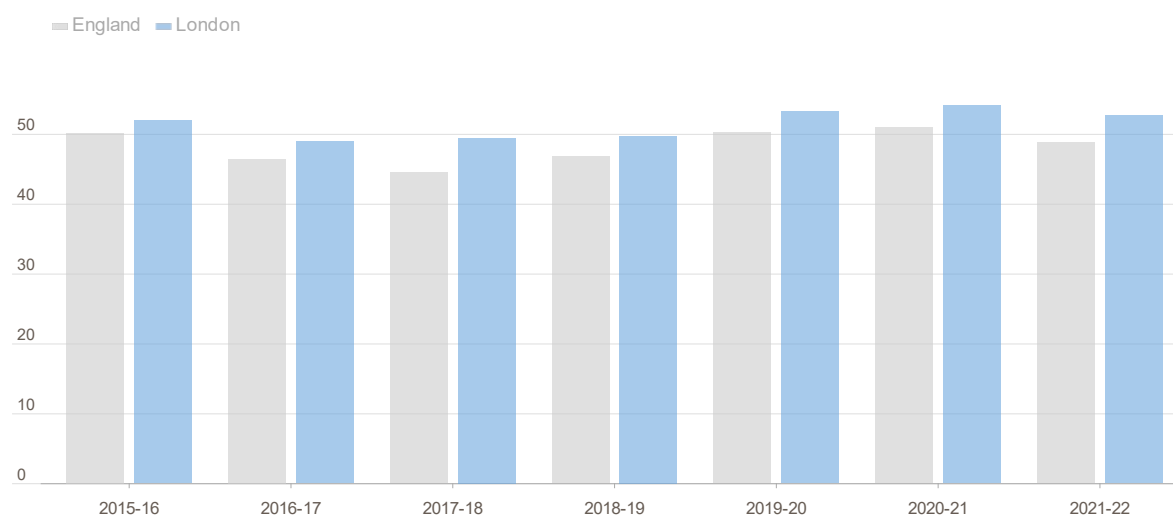
England   London

Source: Department for Education

In 2021-22, the average Attainment 8 score[55] in London was 52.7, which was 3.8 percentage points higher than the England average (48.8).

Since 2015-16, London's average Attainment 8 score increased by 0.7 points (from 51.9 to 52.7). The average across England decreased by 1.3 points over the same period (from 50.1 to 48.8).

Black pupils have the lowest average Attainment 8 score (48.7), compared to 67.8 for the highest-achieving ethnic group (Chinese).

The gap in average Attainment 8 score between SEN pupils and the London average stands at 20 percentage points, which is similar to the England-wide level.

The gap in the average Attainment 8 score between pupils on free school meals (FSM) and those who are ineligible increased from 8.8 points in 2015-16 to 11.8 points in 2021-22.

Across all characteristics (e.g., ethnicity, FSM status), children in London outperform their counterparts in the rest of the country.

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[55] The average attainment 8 score measures pupils' results in 8 GCSE-level qualifications across various core and optional elements.

Figure 12: Fixed-term exclusion rate

The fixed-term exclusion rate[56] for pupils with at least one fixed term exclusion in the academic year in London and England between 2011-12 and 2020-21
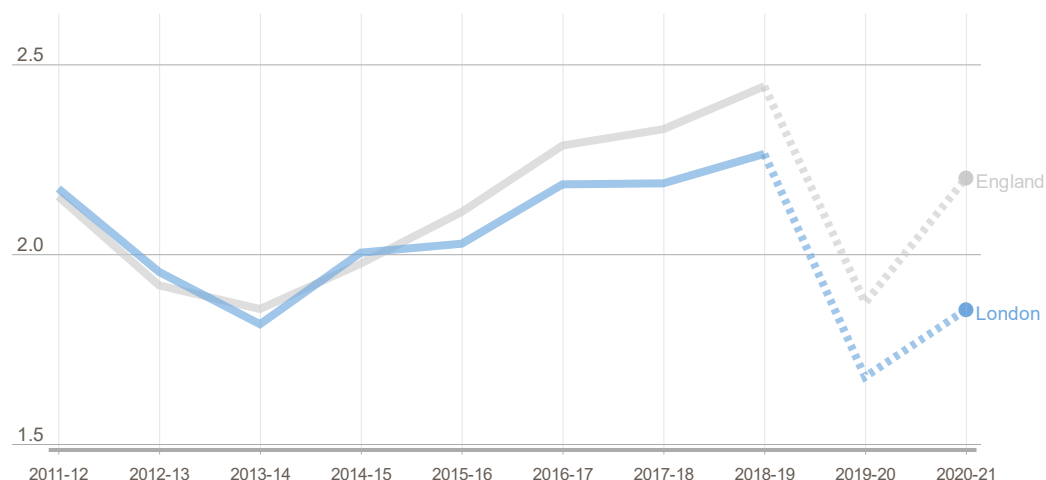
Source: [Department for Education](#)

The fixed-term exclusion (FTE) rate in London for pupils with at least one FTE in the academic year increased from 1.82 in 2013-14 to 2.26 in 2018-19. The latest data (for 2020-21) shows that the FTE rate (1.85) remains below pre-pandemic levels. Caution should be exercised when analysing the pandemic years of 2019/20 and 2020/21, because whilst FTEs were possible, pandemic restrictions impacted the numbers present. The data analysis for school exclusions uses the last year of uninterrupted learning – 2018-19.

Special schools have experienced a decrease in their FTE rate (from 5.35 in 2013-14 to 4.13 in 2018-19), while Black pupils continue to experience a higher FTE rate than other ethnic groups.

Pupils eligible for FSM continue to experience a higher FTE rate (4.43 compared to 1.81), whilst pupils with Special Educational Needs (SEN) have a higher FTE rate (5.3) than those without SEN (1.8).

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[56] The number of fixed-term exclusions is expressed as a rate per 10,000 pupils (headcount).

Figure 13: Permanent exclusion rate across all schools.

The permanent exclusion rate[57] across all schools in London and England between 2011-12 and 2020-21
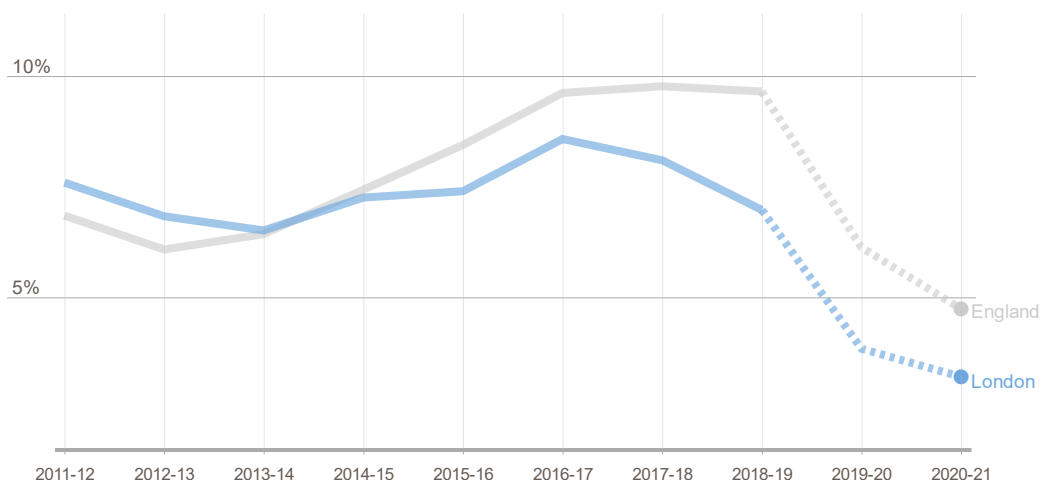
Source: Department for Education

Between 2016/17 and 2020/21, the permanent exclusion rate in London decreased from 0.09 to 0.03, whilst the national exclusion rate decreased from 0.10 to 0.05. Caution should also be taken when analysing these rates during 2019/20 and 2020/21.

Between 2011-12 and 2018-19, pupils eligible for FSM experienced a higher permanent exclusion rate (0.17) than those who are ineligible (0.05).

Black pupils experienced a higher permanent exclusion rate (0.12) than any other ethnic group, while Asians experienced the lowest rate (0.03). Pupils with SEN have a higher permanent exclusion rate (0.19) than those without (0.05).

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[57] The number of permanent exclusions is expressed as a rate per 10,000 pupils (headcount).

Special Educational Needs and Disabilities

Figure 14: Annual change in number of pupils and the number of pupils with an EHC plan or statement of SEN

Annual change in the number of pupils with an EHC plan or statement of SEN and the number of pupils in London between 2016-17 and 2021-22
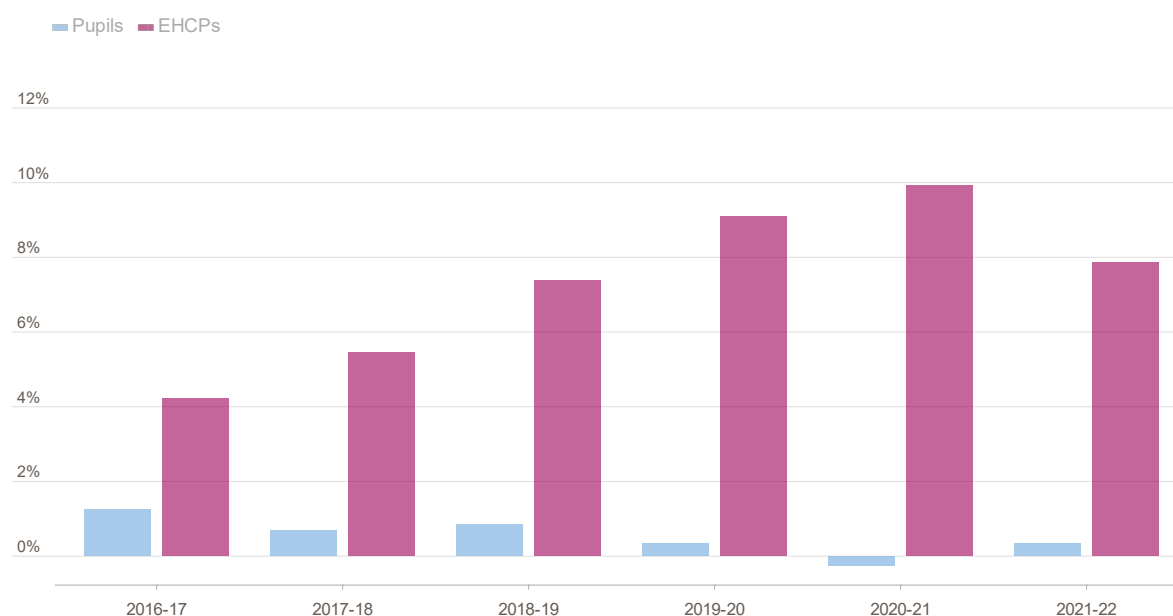
Source: [Department for Education](#)

The number of pupils in London with an Education, Health and Care (EHC) plan or statement of SEN[58] increased by 7.9% between 2020-20 and 2021-22, while the pupil population increased by 0.3%.

Between 2020-21 and 2021-22, the number of primary school pupils with an EHC plan or statement of SEN increased by 7%, compared to a 1% decrease for the primary-school pupil population.
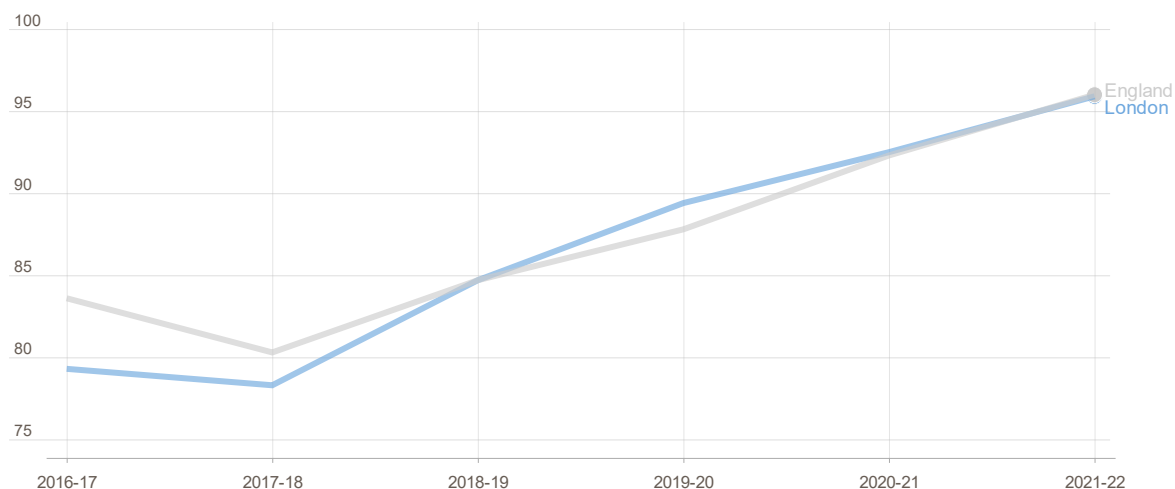
The number of pupils with an EHC plan or statement of SEN across secondary schools increased by 10% between 2019-20 and 2020-21, while that pupil population increased by 2%.

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[58] An Educational Health and Care (EHC) plan is a legal document that sets out a child or young person's educational, health and social care needs. It describes a child's special educational needs and disabilities. The Children and Families Act (2014) introduced EHC plans, which would replace statements of SEN. This change did not apply to children and young people who already had a statement of SEN. The transfer of statements into EHC plans has been a gradual process, meaning that some children may have an EHC plan whilst others still have a statement of SEN.

Post Key Stage 4

Figure 15: Achievement of at least 2 substantial level 3 qualifications
Percentage of students achieving at least two substantial level 3 qualifications in London and England between 2016-17 and 2021-22

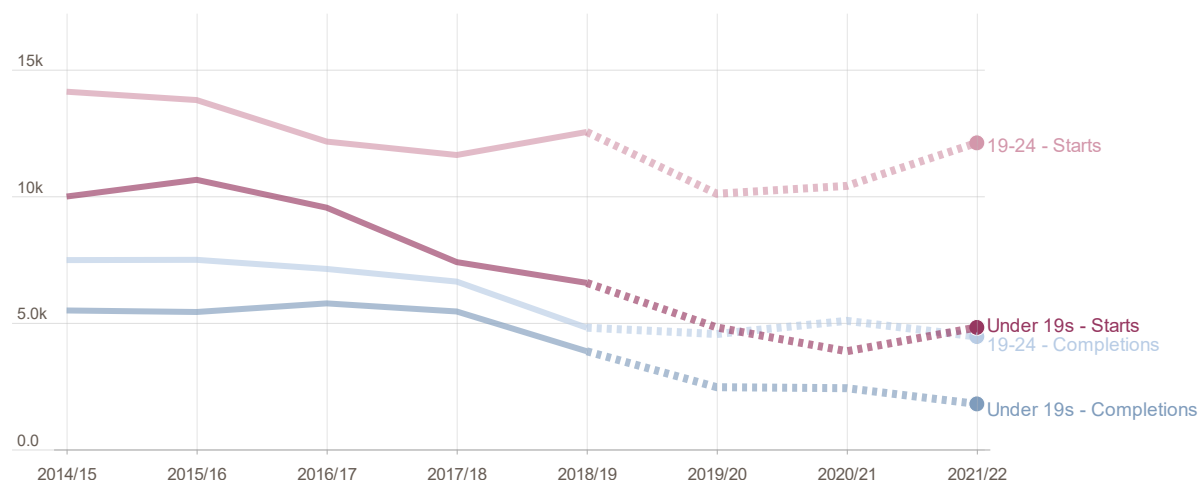*Source: [Department for Education](#)*

96% of pupils across London achieved at least two substantial level 3 qualifications[59] in 2021-22, which is in line with England-wide data.

For 2020-21, 88% of pupils with an EHC plan or statement of SEN achieved at least 2 substantial level 3 qualifications, compared to 95% of pupils with no identified SEN. However, this gap narrowed from 12 percentage points in 2018-19 to 7 percentage points in 2020-21.

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[59] Substantial level 3 qualifications are defined as qualifications that are at least the size of an A level (180 guided learning hours per year), such as a BTEC subsidiary diploma level 3. If a qualification is equal in size to 2 A levels it is counted as 2 substantial level 3 qualifications.

Figure 16: Apprenticeship programme starts and completions

The number of apprenticeship programme starts and completions in London for under 19s and 19-24 year olds between 2014/15 and 2021/22[60]

Source: Department for Education

From 2014/15 to 2021/22, the number of Londoners under-19 starting and completing an apprenticeship programme decreased by 52% and 67%, respectively.

Since 2014/15, the number of Londoners aged 19-24 starting and completing an apprenticeship decreased by 14% and 40%, respectively.

However, since 2020/21, there has been an increase in Londoners under-19 as well as those aged 19-24 starting apprenticeship programmes.

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[60] Data recorded in 2019/20 and 2020/21 are significantly lower than previous years. It is anticipated that apprenticeship starts, and completions have been affected by COVID-19.

Safety

Figure 17: Safety of local area for children and young people to grow up

Percentage of Londoners who agreed that their local area is a safe place for children and young people to grow up between 2017-18 and 2021-22[61]
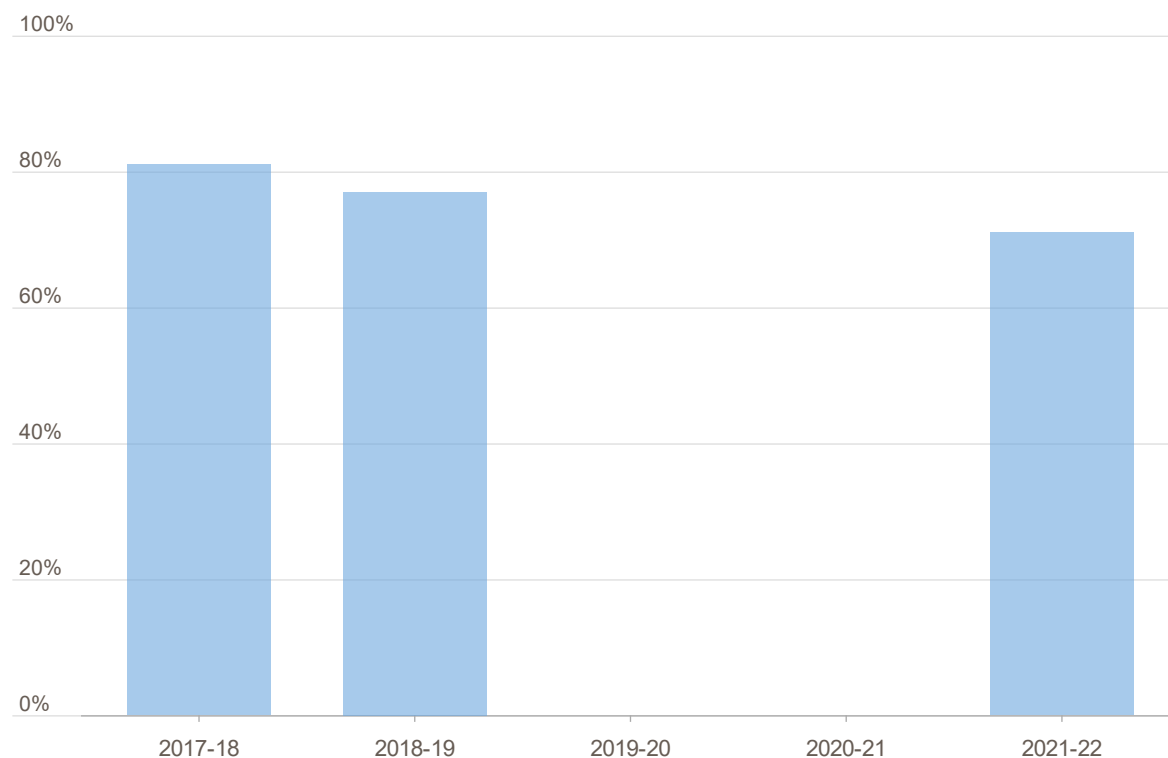
Source: Public Attitudes Survey, MOPAC

In 2021-22, 71% of Londoners agreed that their local area was a safe place for children and young people to grow up, compared to 81% in 2017-18.

Londoners aged 16-24 were least likely to think their local area was a safe place, with 65% agreeing compared to 83% of Londoners aged 65+.

Londoners from BAME communities were less likely to agree that their local area was a safe place to grow up (ranging between 64% and 67%), compared to 75% of White British Londoners (the ethnic group with the highest percentage).

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[61] The PAS was moved from a face-to-face to a telephone methodology in March 2020 as a result of the COVID Pandemic. There was temporary omission of questions during this period.

13: HEALTH, WELLBEING & INEQUALITIES

In this chapter we give an overview of wellbeing and health inequalities in London. Health inequalities are avoidable and unfair. They are typically identified over four dimensions – geography, deprivation, protected characteristics (such as sex and ethnicity) and inclusion health (socially vulnerable groups such as the homeless).

The fundamental causes of health inequalities are the wider determinants, which relate to where we grow, live, work and age and ultimately determine our opportunity for good health. Inequalities within those wider determinants are dealt with in the other chapters such as Communities and The Environment. Inequalities in these social and environmental determinants result in the health inequalities we describe here.

The COVID-19 pandemic reshaped the lives of London's population, and revealed and magnified the health inequalities related to the different circumstances of our lives. We include a selection of indicators that illustrate patterns of mortality, morbidity and the impact of COVID-19; show that pre-pandemic health challenges such as obesity and smoking persist; expose increased pressure on health and social care systems; and reveal that individuals' perceptions of wellbeing have been negatively affected.

This brief chapter contains material which is covered in greater depth in the OHID Health Profile for London Report and the Snapshot of Health Inequalities in London Report.

Life expectancy, mortality and inequalities

Healthy life expectancy (HLE, an estimate of lifetime spent in "Very good" or "Good" health based on how individuals perceive their general health) is a key summary measure of population health. The overall London values are higher than the national average for both males and females, as shown in Figure 1. At 65.0 years, the female HLE for London is slightly higher than the male HLE (63.8 years). These values mask significant variation between boroughs, with a gap of more than 12 years lived in good health between the boroughs with the best and worst values. Values of this indicator range from 58.1 years in Barking and Dagenham to 70.2 years in Richmond-upon-Thames for males, and from 57.8 years in Tower Hamlets to 70.1 years in Wandsworth for females.

Figure 1: Healthy life expectancy at birth in London and England, by sex (2011-13 to 2018–20)
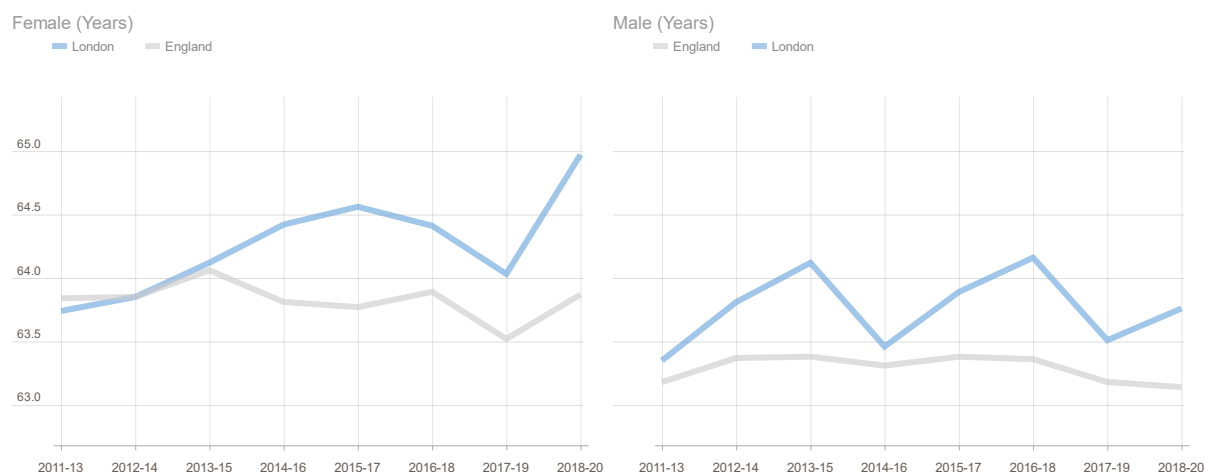
Source: Office for National Statistics (ONS)

Figure 2: Healthy life expectancy at age 60-64 years, in London and England, by sex (2011-13 to 2018–20)

*Source: Office for National Statistics (ONS)*

However, for the values for healthy life expectancy of adults aged 60 – 64 years (14.2 years for women and 13.2 for men), the advantage of London is overturned, as shown in Figure 2. London's lower than national average values are most likely related to the migration of less deprived Londoners out of the city during their thirties and later, leaving a concentration of more deprived Londoners of older ages.

Figure 3: Under 75 mortality rate by deprivation decile in London, comparison of the three years 2019 – 2021

Under 75-year all-cause age-standardised mortality rate per 100,000 population
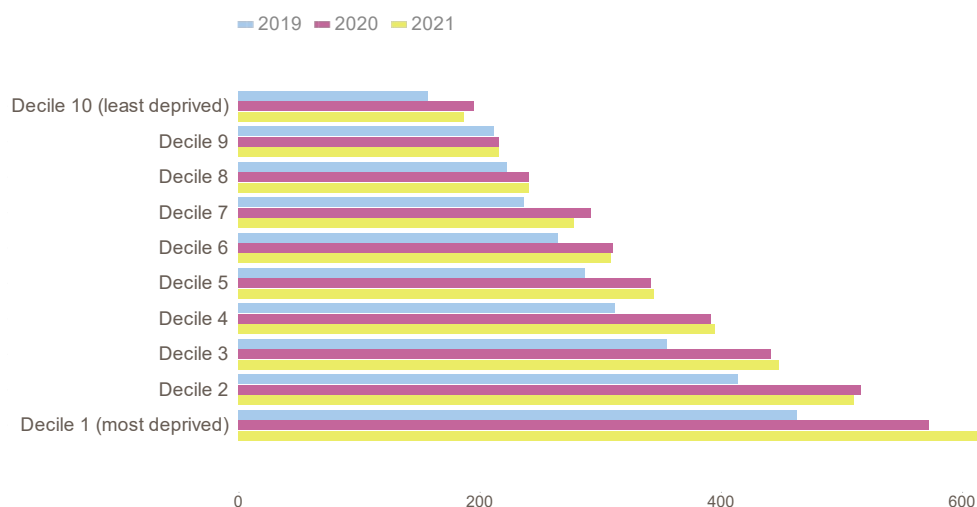
Source: OHID Health Profile for London Report

The all-cause mortality rate for people aged less than 75 years (often termed "premature mortality") is highly associated with deprivation, as shown in Figure 3. The figure shows that socio-economic inequality in mortality rates increased between 2019 and 2021 because the lowest deprivation deciles were greatly impacted by the COVID-19 pandemic. In 2021, the rate for the most deprived decile was nearly 3.3 times the rate for the least deprived decile (614 compared to 187), while in 2019 the ratio between the two mortality rates was lower, at 2.95 (463 compared to 157).

Figure 4: Main causes of adult mortality in London by gender (2021)

Number of deaths in people aged over 20 years
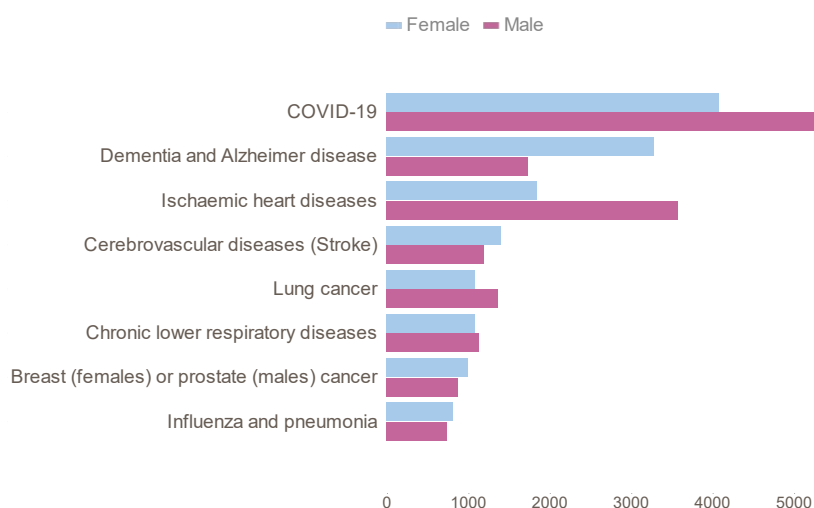
Source: Office for National Statistics (via Nomis)

London was profoundly impacted by COVID-19. Of the nine English regions, London was the region with highest excess mortality (the ratio between the number of actual deaths, and number of deaths from all causes that would have been expected over the same period) between 27/03/2020 and 23/09/2022, according to OHID.

Figure 4 shows that in London in 2021, the main cause of adult death in both men and women was COVID-19, with Dementia and Alzheimer disease as the second main cause for women, and ischaemic heart disease (IHD) as the second main cause for men. For both males and females between the ages of 20 and 34 years, there were more deaths due to suicide than due to COVID-19. Across England, cancer was the cause of death associated with the highest number of years of life lost, as shown by data from the Wider Impacts of COVID-19 tool (OHID). Except for the two recent years affected by COVID-19, since 2001, IHD has consistently been the leading cause of death for males in London and England. Mortality rates for IHD, cerebrovascular diseases, chronic lower respiratory diseases and cancer have all declined, while rates for deaths resulting from dementia and Alzheimer disease have steadily increased over this period. However, comparisons of recent with earlier rates are not straightforward because COVID-19 was introduced as a new cause of death in 2020. With that in mind, COVID-19 could now cause deaths that might otherwise have been caused by respiratory disease for example, if the pandemic had not occurred. For females, dementia and Alzheimer disease overtook IHD as the leading cause of death in 2012.

Figure 5: Infant mortality rate by London borough (2019-21)
Infant deaths under 1 year of age per 1000 live births
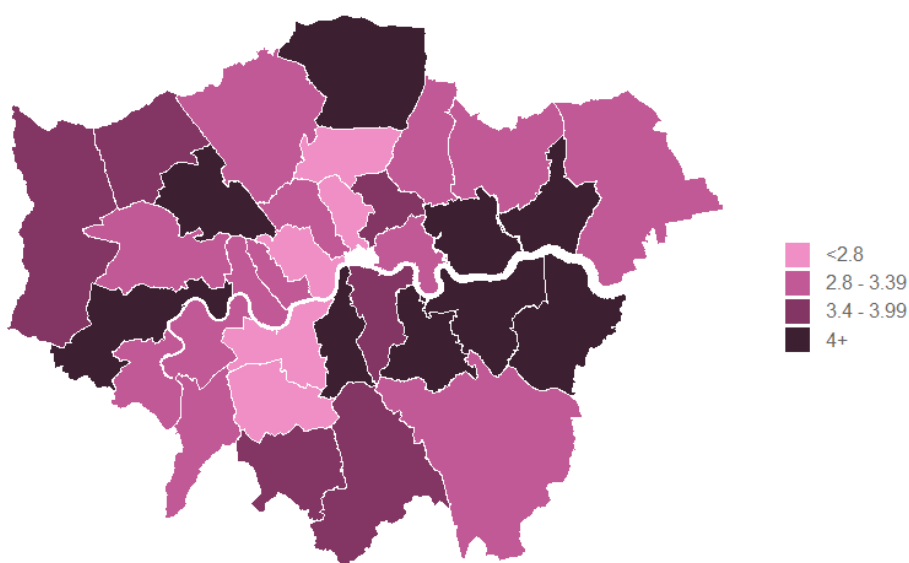
Source: OHID Public Health Outcomes Framework Data for City of London were combined with those for Hackney.

Infant Mortality Rates generally reflects the overall health of a society, as well as maternal and infant health. The most recent data show that the London rate is lower than that for England as a whole, at 3.5 per 1000 live births compared to 3.9, but the rate greatly varies between boroughs, as shown in Figure 5. For example, the rate is greater than 5.0 in Hounslow and under 2.3 in Wandsworth, Westminster and Islington. The London rate decreased from 5.7 in 2001-03 to 3.2 in 2014–16, and has gradually increased since then.

Inequalities in morbidity

A useful measure of poor-health is "Years lived with disability" (YLD), which combines the prevalence of each condition with a rating of the severity of symptoms. By this measure, according to the Global Burden of Disease Study, the leading causes of illness for females in London in 2019 were Low back pain (1251), Headache disorders (934) and Depressive disorders (830), and for males were Low back pain (917), Diabetes (704) and Depressive disorders (614) (values are for age-standardised YLDs per 100,000 population). More recent data (April 2020 – March 2021) from GP practices from the NHS Quality and Outcomes Framework) shows that prevalence rates in London were lower than national rates for all conditions except Mental Health.

Figure 6: Prevalence of common diseases in older adults in London, by most and least deprived quintiles, June 2021
Prevalence of disease in people aged 65 – 84 years
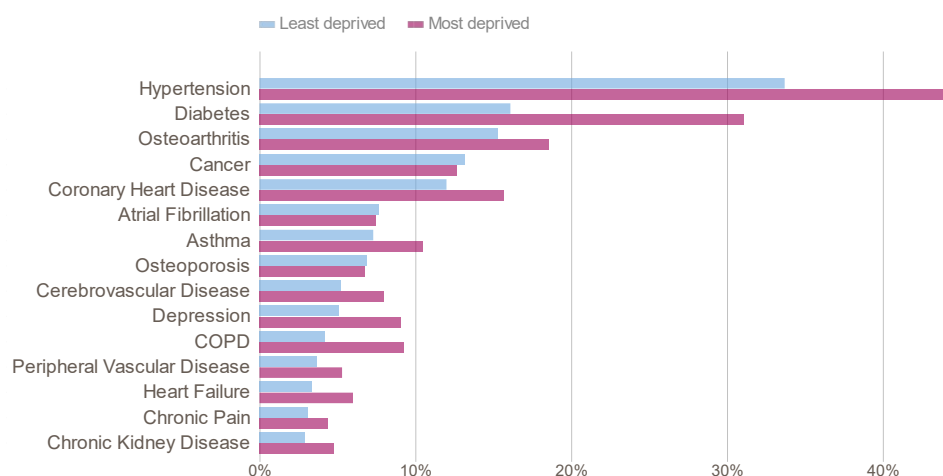
Source: NHS Segmentation Model

There is wide variation in rates of common diseases in London. Figure 6 shows how for older adults, prevalence rates of conditions are much higher in the most deprived quintiles compared to least deprived, especially for diabetes (93% higher), lung disease (121% higher) and depression (78% higher). This difference is linked to the ethnic variation in prevalence of common diseases. For example there is a much higher prevalence of hypertension in Asian (56.5%) and Black (56.0%) ethnic groups compared to White (42.2%) for the age group 65 – 84 years in London. For diabetes, again there is a much higher prevalence in Asian (49.2%) and Black (40.4%) ethnic groups than White (18.8%).

**Figure 7: Anxiety and life satisfaction for adults in London, 2011-12 to 2021-22**

Mean responses on a scale from 0-10 to "Overall, how anxious did you feel yesterday", and "Overall, how satisfied are you with your life nowadays?"

Source: Office for National Statistics (Based on Labour Force Survey)

Figure 7 shows that indices of wellbeing have lower values in London compared to the national average. The figure also shows how after steep improvements in values at the start of this decade, the COVID-19 pandemic led to a spike in anxiety levels, and a drop in levels of life satisfaction in London. Values for the year ending March 2022 recovered somewhat, but have not yet reached their pre-pandemic values.

Figure 8: Percentage of school pupils categorised by ethnicity, with social, emotional and mental health needs, in London and England (2021/22)
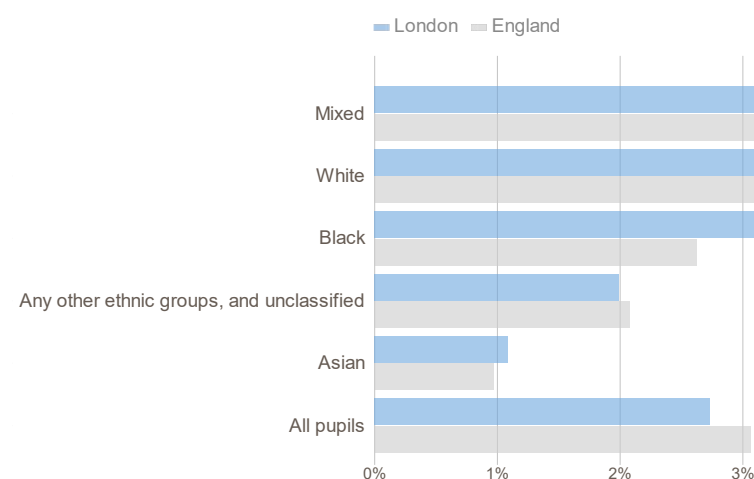
Source: Department of Education Data in the chart includes state-funded nursery, primary, secondary and special schools, non-maintained special schools and pupil referral units

Figure 8 shows the proportion of children from each ethnic group who had Special Educational Needs categorised as "Social, Emotional and Mental Health needs" (SEMH). The term refers to children and young people with additional needs who have difficulties with managing their emotions and behaviours - this can be affected by the environment, difficult life experiences and attachment.

Figure 8 shows that within London, children and young people from White, Black and Mixed ethnic groups are over-represented in the SEMH group compared to the overall pupil group, while those of Asian and other ethnicity are under-represented in the SEMH group. The equivalent proportions across England are provided for comparison, and indicate that school pupils of Black and Mixed ethnicity may be at higher risk of having mental health difficulties in London compared to the rest of the country.

Behavioural risk factors and inequalities

The "causes of the causes" of poor health are the wider determinants (social and environmental) relating to where we live and work. Inequalities within those wider determinants including housing, employment, income, poverty and the environment were described in earlier chapters. An important pathway through which these determinants impact on health inequality is by influencing opportunity and motivation for positive health behaviours. For example, healthy dietary choices and physical activity lower the risk of conditions like diabetes and heart disease, while high alcohol consumption and smoking raise the risk of liver disease, lung disease and cancer.

Figure 9: Percentage of adults classified as overweight/obese by London borough (2021/22)

% adults (aged 18+ years) with body mass index greater or equal to 25 kg/m^2
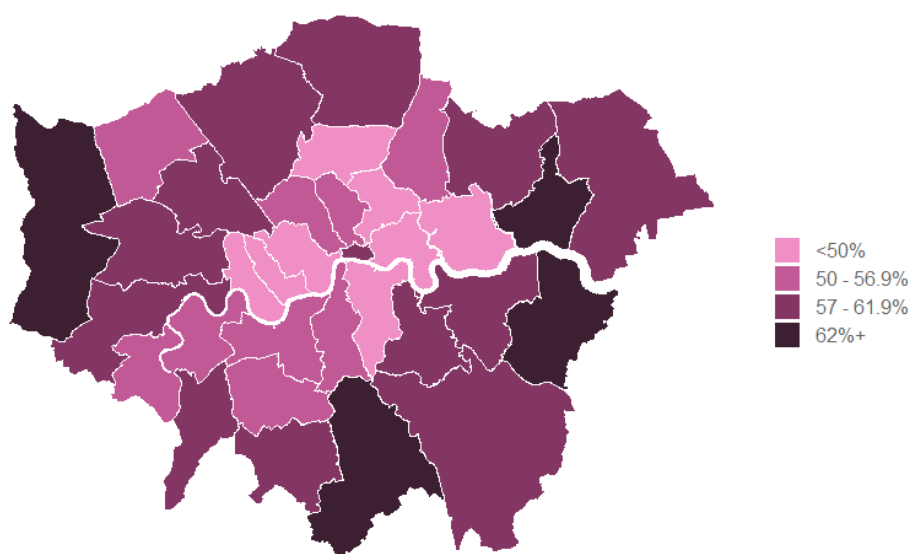
Source: OHID Public Health Outcomes Framework (based on Active Lives Adult Survey, Sport England)

Across London in 2021/22, more than half (56%) of adults were overweight or obese. The rate has been this high since 2015 and has consistently been slightly lower than the national rate. Demographic variation in London is expected to follow the national pattern of higher prevalence in males than females, reaching a peak for the age groups falling between 55 and 84 years (local disaggregated data are not available). Figure 9 shows that the boroughs with the highest rates are concentrated in the east, with the highest rate in Barking and Dagenham (70%) and the lowest in Southwark

(44%). Child obesity data were described in the Young People and Education Chapter.

Figure 10: Percentage of physically active adults by London borough (2021/22)

% adults (aged 19+ years) doing 150+ minutes/week moderate intensity activity in bouts of 10+ minutes in previous 28 days
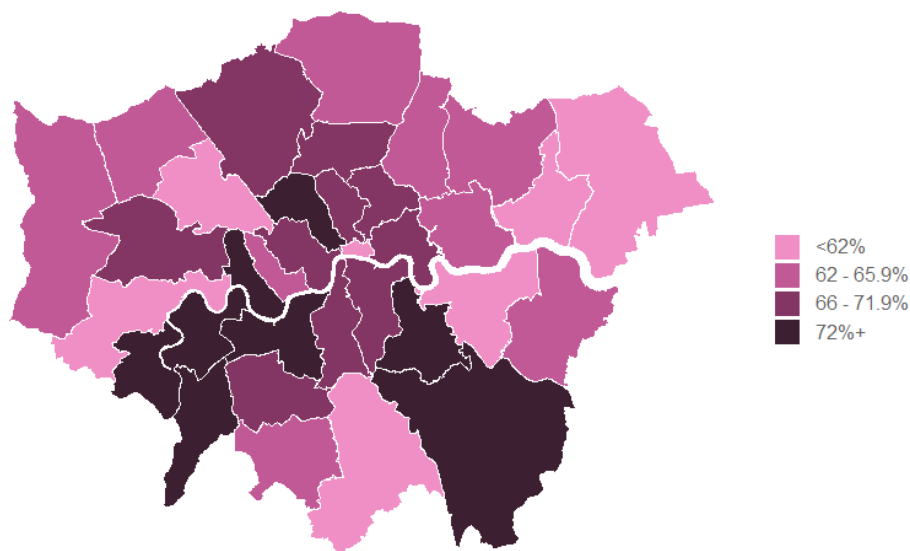

Source: OHID Public Health Outcomes Framework (based on the Active Lives Adult Survey, Sport England)

Figure 10 shows a different geographical variation for physical activity. The boroughs with highest proportions of adults reporting a desirable level of physical activity are Lewisham, Wandsworth, and Hammersmith and Fulham, at 74%. City of London had the lowest rate at 36%.

Figure 11: Smoking prevalence in adults in London by housing tenure (2021)

Prevalence of current smoking among persons aged 18 years and over
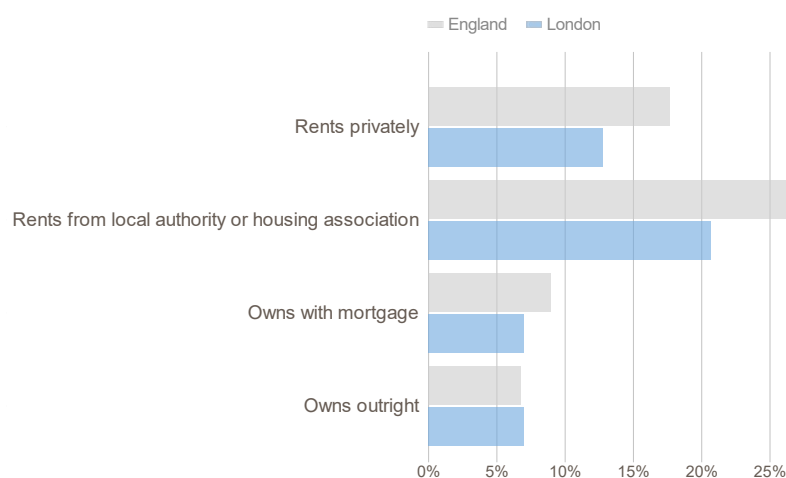
Source: OHID Public health profiles (based on the Annual Population Survey)

Smoking is the most important cause of preventable ill health and premature mortality in the UK. Smoking prevalence in London has decreased by about a third since 2011 but significant inequalities remain, with rates being higher in deprived areas, for those with mental illness, and for those with routine and manual occupations. Figure 11 shows the significant variation between population groups disaggregated by housing tenure as a proxy for deprivation. The figure also shows that the overall smoking rate for London is lower than for England as a whole.

For alcohol consumption, the values for London in 2021/22 of the alcohol-related hospital admissions rate from NHS Hospital Episode Statistics expose the difference between the genders in the impact of alcohol on their health (2683 for males and 906 for females, per 100,000). This indicator's values have considerably increased from the lower values in 2020/21 (2280 and 670 respectively). The lower values were likely due to a "lockdown effect" during the COVID-19 pandemic, whereby people avoided using hospitals both to ease pressure on the NHS, and to minimise the perceived risk of catching COVID-19.

Healthcare inequalities

Inequalities in access to, quality, and experience and outcomes of health and care provision can compound and worsen existing health inequalities. In terms of access for example, in inner cities and deprived areas, there tend to be fewer general practitioners per head of population, with large caseloads of patients with complex needs. Equally, in terms of outcomes, screening rates for cervical and breast cancer, and immunisation rates are lower in groups from more deprived areas.

Figure 12: Cancer referral rate in London by deprivation quintile, 2009/10 to 2020/21

Number of urgent suspected cancer referrals ("two-week wait referrals") / 100,000
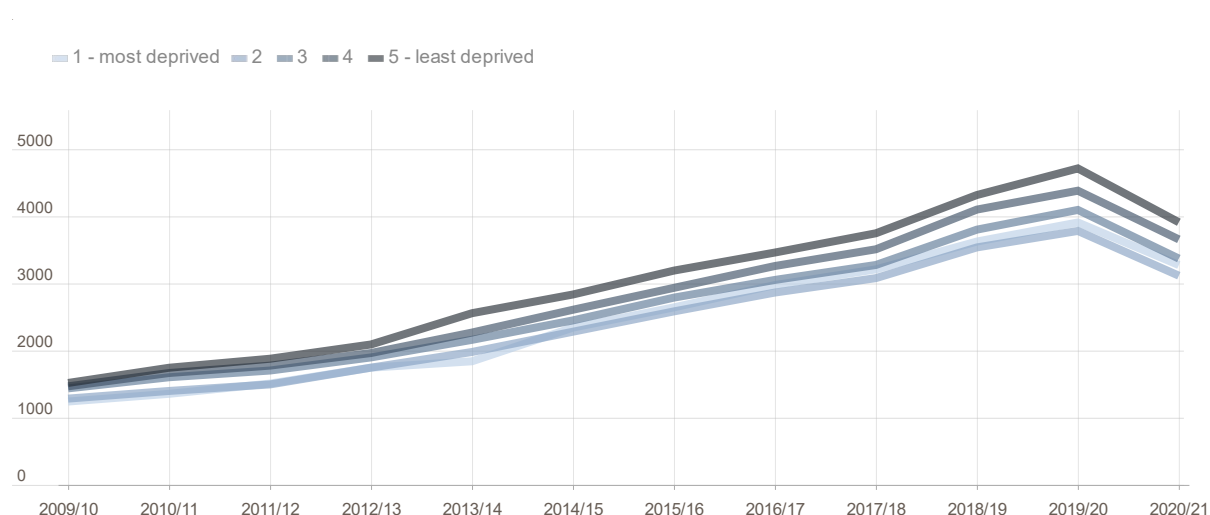

Source: NHS National Cancer Registration and Analysis Service

Figure 12 shows how the rate of urgent suspected cancer referrals (used to refer patients with potential cancer symptoms to secondary care for investigation and possible diagnosis) has increased in London over the past decade. There is significant inequality in this rate between deprivation quintiles that has remained

nearly constant over this period, with around 20% greater referral rate for the least deprived compared to the most deprived quintile. The pattern reflects the "Inverse Care Law" whereby those who most need medical care are often least likely to receive it. Figure 12 also shows the impact of the COVID-19 pandemic on provision of health services, with a sharp reduction in referral rates between 2019/20 and 2020/21.

Figure 13: Percentage of adults who have received three COVID-19 vaccinations in London, by ethnic group, November 2021 – Jan 2023
Cumulative percentage of adults (18+ years) who have received three COVID vaccinations
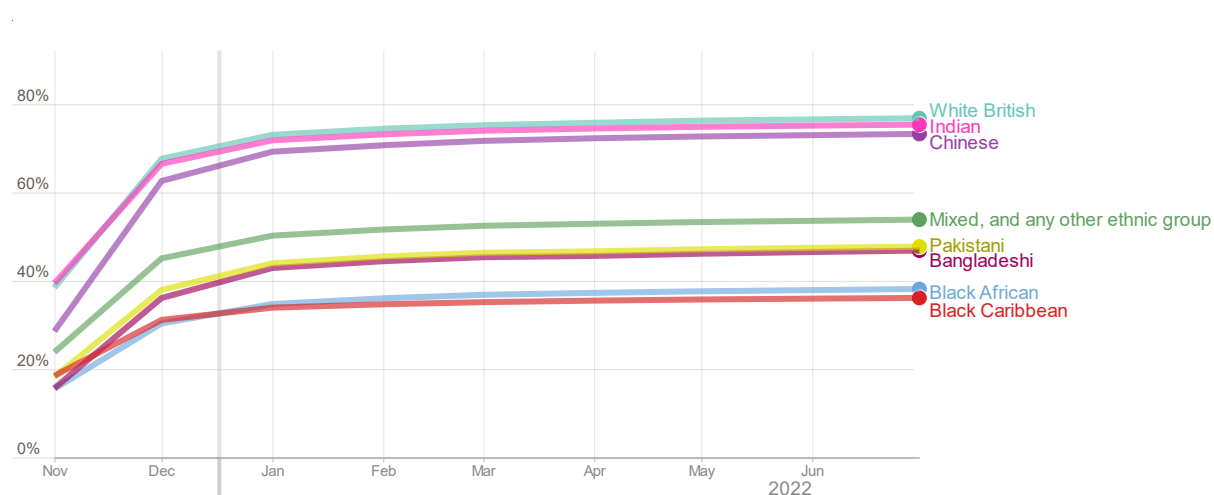
Source: COVID-19 Health Inequalities Monitoring for England (CHIME) tool

Figure 13 shows how the prevalence of full COVID-19 vaccination varied between ethnic groups until the end of January 2023. Although the absolute rates shown on the figure are not completely reliable (due to challenges in selecting a denominator for calculation, and in collection of ethnicity data), it is certain that there was wide variation between ethnic groups.

Figure 14: Hospital admissions for asthma (< 19 years) by London borough (2021/22)

Emergency hospital admissions for asthma for children under 19 years, crude rate per 100,000

	<125
	125 - 144
	145 - 169
	170+
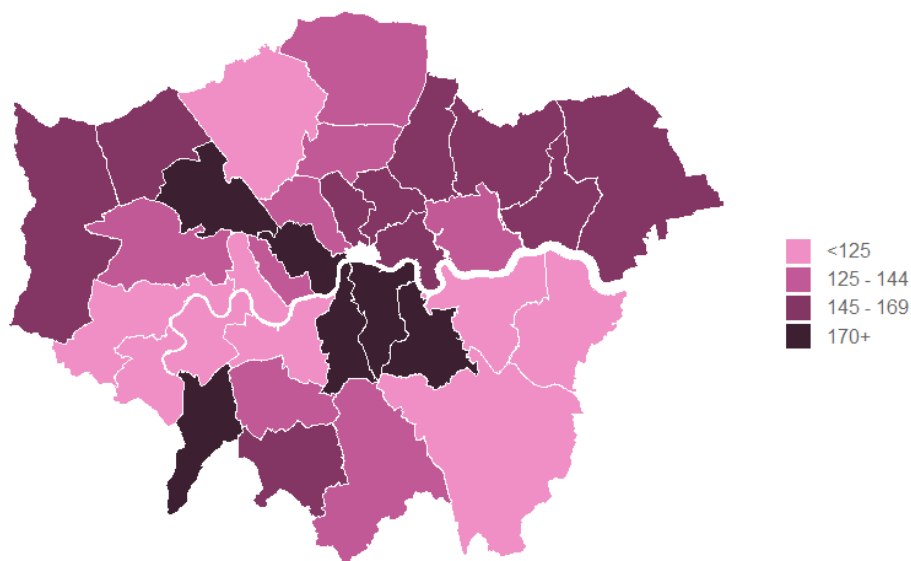
Source: OHID Child and Maternal Health fingertips profiles Data for City of London were combined with those for Hackney.

Figure 14 shows the variability in the rate of emergency hospital admissions for asthma across London. As well as the risk factors for asthma such as levels of environmental pollutants (described in the chapter on The Environment) and aeroallergens, the quality of care and management of the condition are likely to be key determinants of admissions rate. Many hospital admissions related to long-term conditions could potentially be avoided with timely and effective community care. Thus data on hospital admissions for asthma provide a useful indicator of access to care and its quality for children and young people. The COVID-19 pandemic impacted on hospital activity, so admissions reduced in 2020/21. The asthma hospital admission rates have therefore significantly increased since the previous edition of this report. Rates in 2020/21 ranged between around 40 – 120 per 100,000, while in 2021/22 the rates mapped above ranged from below 80 in Hounslow and Greenwich to above 200 per 100,000 in Brent and Lewisham.