

# **The State of London**

**A review of London's economy and society**

January 2024

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Greater London Authority

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City Hall  
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[www.london.gov.uk](http://www.london.gov.uk)

Tel 020 7983 4000

For more information about this publication, please contact:

City Intelligence

Email [intelligence@london.gov.uk](mailto:intelligence@london.gov.uk)

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## **Addendum – 6 March 2024**

Table 1 was amended to correct the error that stated Barking and Dagenham was the smallest London borough. This has been changed to Kensington and Chelsea.

Under Key stories for London – Young People and Education, between 2021/22 and 2022/23 the number of 19-to-24- year- olds starting an apprenticeship decreased. This originally stated an increase.

Under Young People and Education, Figure 6 was amended to show that 95% of places on the Early Years Register are in ‘good’ or ‘outstanding’ settings. And Figure 14 was amended to show that the number of pupils in London with an Education, Health and Care (EHC) plan or statement of SEN increased by 8.5% between 2021-22 and 2022-23, while the pupil population increased by 0.2%. In addition, between 2020-23 and 2021-22, the number of state-funded primary school pupils with an EHC plan or statement of SEN in London increased by 9.9%, while the pupil population decreased by 1.0%.

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## 1: INTRODUCTION

This is the fourth 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 – thereby presenting an updated snapshot of how the capital is performing.

While London's economy recovered resiliently from the pandemic (compared to other UK regions), it continues to face major challenges, with high inflation and the knock-on impact it is having on cost of living being a key example. 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 as identified and prioritised by the Mayor, including but not limited to environmental sustainability, 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 also provided in 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. Moreover, 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](mailto:intelligence@london.gov.uk).

Latest data are provided at the time of drafting the report in December 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: LONDON IN FIGURES

This section provides some fundamental statistics for London and compares the capital to three other global cities – New York, Paris, and Tokyo – across geographic, demographic and economic parameters.

**Table 1: Geography, demography and economy statistics for London**

| Parameter                      | Latest figure   | Additional comments  |
|--------------------------------|---|--|
| <b>GEOGRAPHY</b>               |   |  |
| Area                           | 1,571.9 km <sup>2</sup>   | Office for National Statistics (2021)  |
| Biggest borough                | Bromley (150.2 km <sup>2</sup> )  |  |
| Smallest borough               | Kensington and Chelsea (12.1 km <sup>2</sup> )  | City of London, while smaller (2.9 km <sup>2</sup> ), is not technically a borough   |
| Topography                     | 48%-51% landmass either 'green' or 'blue' (i.e., covered by parks, gardens, rivers, etc.) | How Green is London report (2019) <sup>1</sup>   |
| City resilience ranking (2023) | 3   | Economist Impact City Resilience Index (2023)  |
| <b>DEMOGRAPHY</b>              |   |  |
| Population                     | 8.87 million  | Office for National Statistics 2022 mid-year estimates   |
| Foreign-born population        | 38.5%   | London and Partners (2023)   |
| Ethnic composition             | 54% White, 46% BAME   | Data from 2021 Census; 14% Black, 21% Asian, 6% Mixed, 5% Other  |
| Median age                     | 35.9  | Office for National Statistics figure for 2022   |
| Male/female breakdown          | 48% male, 52% female  | GLA Demography (2022)  |
| <b>ECONOMY</b>                 |   |  |
| Gross value added (2023)       | £525.4  | GLA Economics (2019 constant prices; £billion)   |
| Employment rate                | 74.2%   | ONS (adjusted; 3 months to October 2023)   |
| Unemployment rate              | 5.3%  | ONS (adjusted; 3 months to October 2023)   |
| Income                         | £2,710  | Median nominal monthly pay (HMRC RTI data); October 2023   |
| Poverty                        | 25%   | Percent of the population living in households with less than 60% of the national median income (after accounting for housing costs) |

<sup>1</sup> [London Green and Blue Cover - London Datastore](#)

**Table 2: London compared to New York, Paris and Tokyo**

|   | London | New York  | Paris                                     | Tokyo                                 |
|---|--------|---|---|---------------------------------------|
| Total surface area (km <sup>2</sup> )             | 1,572  | 2,973 <sup>2</sup> (metropolitan area excluding inland water) | 2,854 <sup>3</sup> (Île de France region) | 2,190 <sup>4</sup> (Tokyo Metropolis) |
| Percent green space <sup>5</sup>                  | 33%    | 27%   | 10%                                       | 7.5%                                  |
| City resilience ranking (2023) <sup>6</sup>       | 3      | 1   | 5   | 8                                     |
| Population (million) <sup>7</sup>                 | 8.8    | City: 8.8<br>Greater New York: 20.0                           | 13.3                                      | 37.0                                  |
| Median age  | 35.9   | 37.3 <sup>8</sup> (2023)                                      | 36 <sup>9</sup> (2021)                    | 49 <sup>10</sup> (2023)               |
| Foreign-born population (%) <sup>11</sup>         | 38.5   | 36.4  | 19.8                                      | 4.1                                   |
| Gross domestic product (\$bn; 2023) <sup>12</sup> | 909    | 1,826   | 853                                       | 814                                   |
| Unemployment rate (latest available; %)           | 5.3    | 4.7 <sup>13</sup> Oct 2023                                    | 5.5 <sup>14</sup> Q2 2023                 | 4.6 <sup>15</sup> 2023                |
| Property Price Index (2023) <sup>16</sup>         | 16.7   | 10.0  | 19.4                                      | 12.4                                  |
| City Happiness Index ranking (2020) <sup>17</sup> | 36     | 30  | 43  | 79                                    |

<sup>2</sup> Area of New York City - The Physics Factbook ([hypertextbook.com](https://hypertextbook.com))

<sup>3</sup> ÎLE-DE-FRANCE, région administrative - Encyclopædia Universalis

<sup>4</sup> 令和元年全国都道府県市区町村別面積調（10月1日時点） | 国土地理院 ([archive.org](https://archive.org))

<sup>5</sup> World Cities Culture Forum – Data - World Cities Culture Forum

<sup>6</sup> The Resilient Cities Index – The Resilient Cities Index 2023 ([economist.com](https://economist.com))

<sup>7</sup> London and Partners (2023). Global Cities Comparison Report.

<sup>8</sup> New York City, New York Population 2023 ([worldpopulationreview.com](https://worldpopulationreview.com))

<sup>9</sup> Paris, France Population (2023) - Population Stat

<sup>10</sup> Median Age of Japan 1950-2023 & Future Projections ([database.earth](https://database.earth)). Note : This is the median age for Japan not Tokyo specifically; it could be slightly lower for Tokyo, but is likely to be higher than London's, New York's, and Paris'.

<sup>11</sup> fDi Intelligence from the Financial Times Ltd

<sup>12</sup> Obtained from London and Partners (2023). Data itself compiled by JLL (June 2023) and sourced from JLL/Oxford Economics

<sup>13</sup> Unemployment Rates for Metropolitan Areas ([bls.gov](https://bls.gov))

<sup>14</sup> Taux de chômage localisé par département - Paris | Insee

<sup>15</sup> Tokyo review | 97 facts and highlights ([versus.com](https://versus.com))

<sup>16</sup> Property Prices Index 2023 Mid-Year ([numbeo.com](https://numbeo.com)). Index is ratio of median apartment prices to median familial disposable income.

<sup>17</sup> Cities and Happiness: A Global Ranking and Analysis | The World Happiness Report



### 3: KEY STORIES FOR LONDON

While it is not possible to summarise all the information presented in this report, this section presents highlights across a range of chapters which show how the city is developing and some areas of change.

London continues to show resilience since the previous edition of this report in June 2023, but the city’s high cost of living continues to impact both households and businesses.

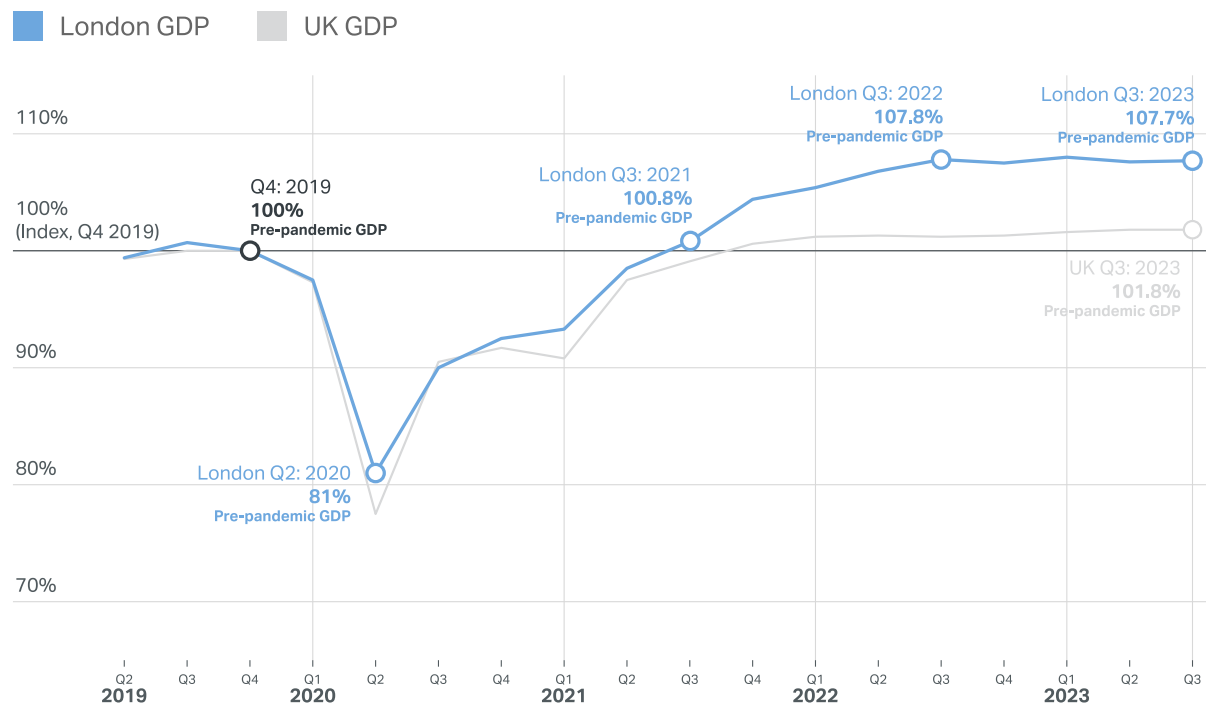
#### Economy and Labour Market

GLA Economics estimates that London’s GDP was up 7.0% year-on-year in Q3 2022, and down 0.1% in the most recent year to Q3 2023. Output growth is expected to remain moderate, averaging 1.0% across 2024 and 1.6% in 2025.

The estimated number of workforce jobs in London reached 6.48 million in June 2023, up 6.6%, or 400,000 jobs on the pre-pandemic December 2019 level.

#### London’s GDP was up 7% year-on-year in Q3 2022 and down 0.1% in the most recent year to Q3 2023, but continues to outpace the UK’s

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



Source: Office for National Statistics, GLA Economics  
Graphic: GLA City Intelligence

## Income, Poverty and Destitution

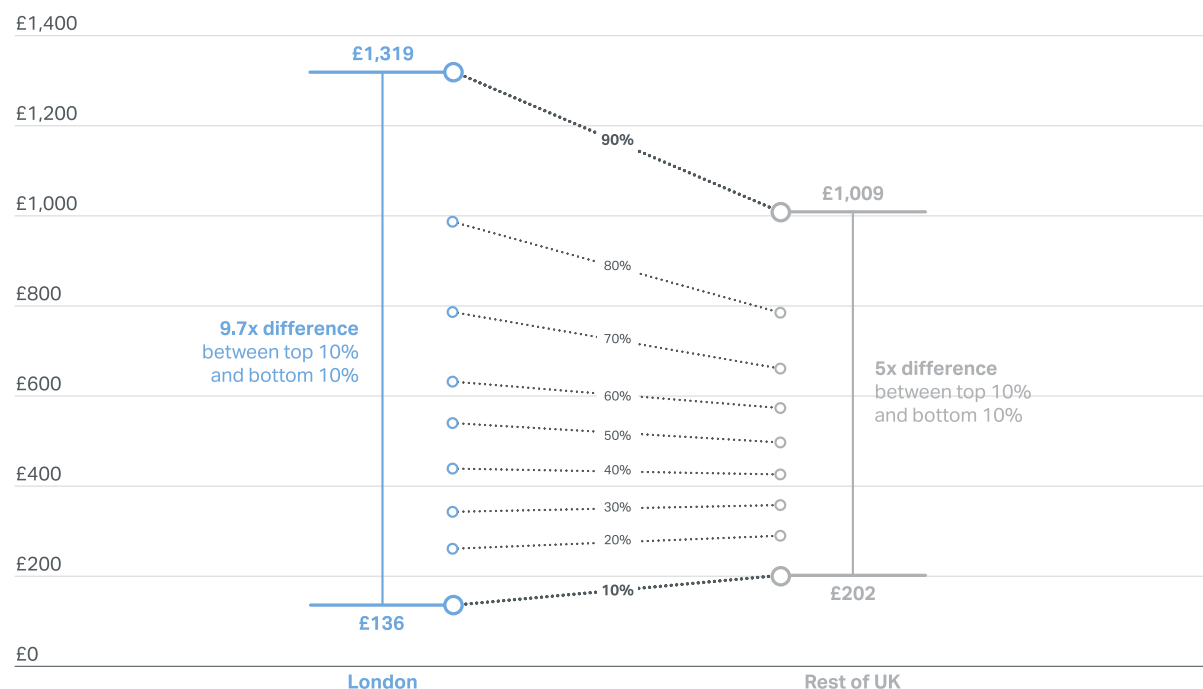
Income inequality within London is stark, with the richest tenth of Londoners having almost 10 times the income of the poorest tenth (twice the ratio for the rest of the UK).

The reduction in total Universal Credit claimants in London seen to mid-2022 has started to reverse over the last year, climbing back to almost one million by October 2023.

17% of Londoners said they were struggling financially or not able to manage.

### 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\*



Source: Households Below Average Income (HBAI), DWP

Note: \*Data not available for 2020/21, so the figures are an average of the two remaining time points

Graphic: GLA City Intelligence

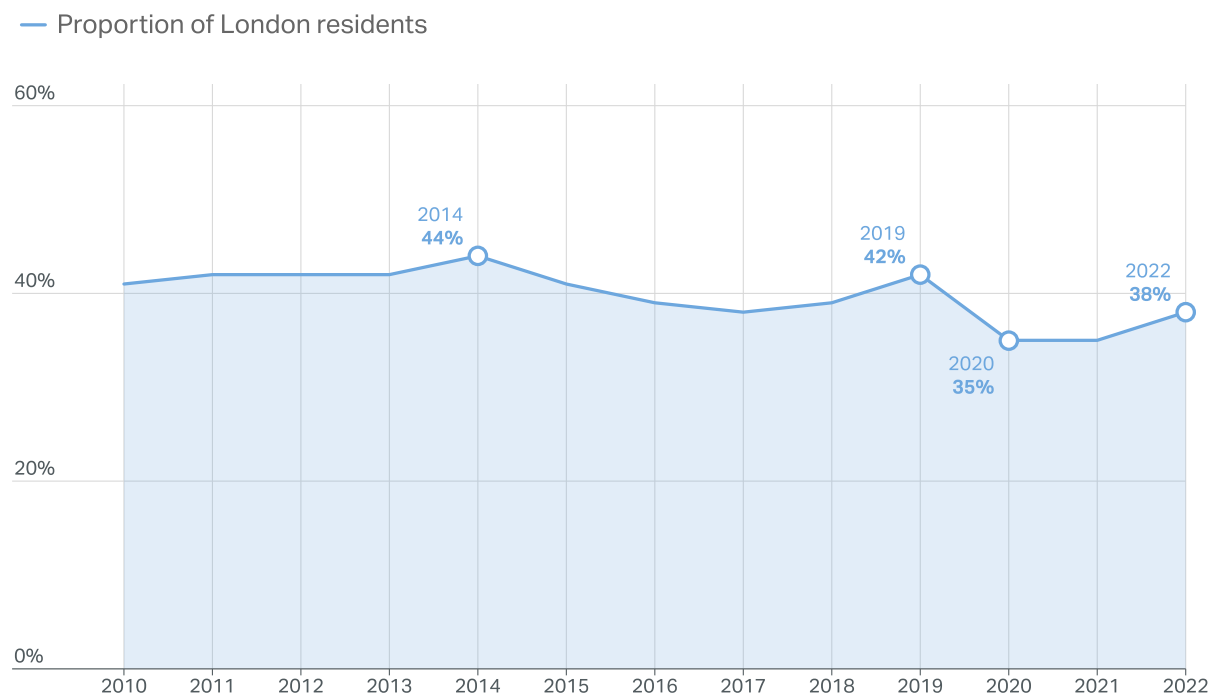
## Transport and Infrastructure

The latest data shows that the proportion of Londoners achieving at least 20 minutes of active travel per day started to recover after the pandemic, reaching 38% in 2022.

Although indicators of public transport show positive signs of recovery towards pre-pandemic baselines, there remain some gaps in demand, service provision and performance against pre-pandemic norms.

### After a recent decline, the proportion of Londoners achieving at least 20 minutes of active travel per day has started to increase

Proportion of London residents achieving at least 20 minutes of active travel per day



Source: Travel in London (TfL)  
Graphic: GLA City Intelligence

## Communities

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 April 2020, reaching 95% in September 2023.

Londoners were most trusting of medical institutions. 50% of Londoners (Nov '23) said they had trust in their GP. Meanwhile, trust was lowest for London media (18%), borough councils (20%) and the Metropolitan Police Service (24%).

### 95% of Londoners agree that their local area is a place where people from different backgrounds get on well together

Proportion who agree that their local area is a place where people from different backgrounds get on well together - April 2020 to September 2023



Source: MOPAC Public Attitude Survey (PAS)  
Graphic: GLA City Intelligence

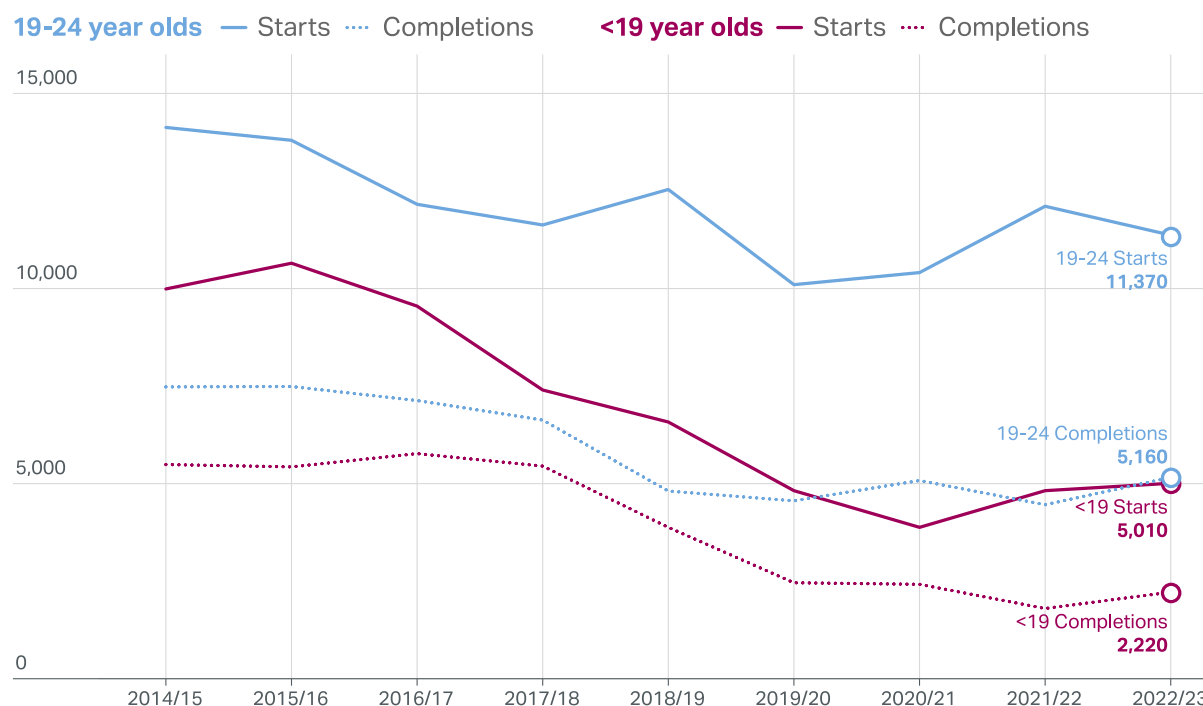
## Young People & Education

From 2021/22 to 2022/23, there was an uptick in under 19 year olds starting apprenticeship programmes in London.

The percentage of eligible children using at least part of the Free Early Education Entitlement continued to increase from 2022 to 2023, both at London and England levels.

### In London, from 2021/22 to 2022/23, there was an uptick in under 19 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 2022/23



Source: Department for Education  
Graphic: GLA City Intelligence

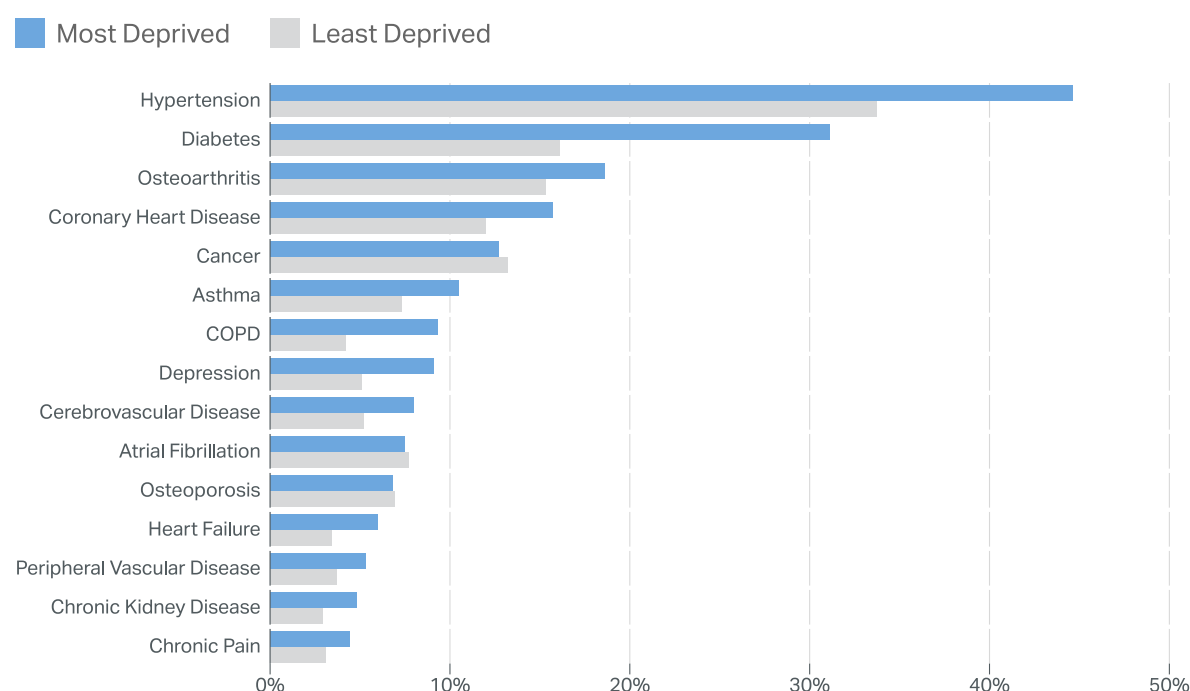
## Health, Wellbeing and Inequality

Prevalence rates of common diseases 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 also linked to the ethnic variation in prevalence of common diseases.

Indices of wellbeing in London have risen for 2022 compared to 2021, but remain lower than their pre-COVID levels.

### Prevalence rates of common diseases are much higher amongst the most deprived Londoners

Prevalence of common diseases in older adults (aged 65 – 84 years) in London, by most and least deprived quintiles, June 2021



Source: NHS Segmentation Model  
Graphic: GLA City Intelligence

## Housing

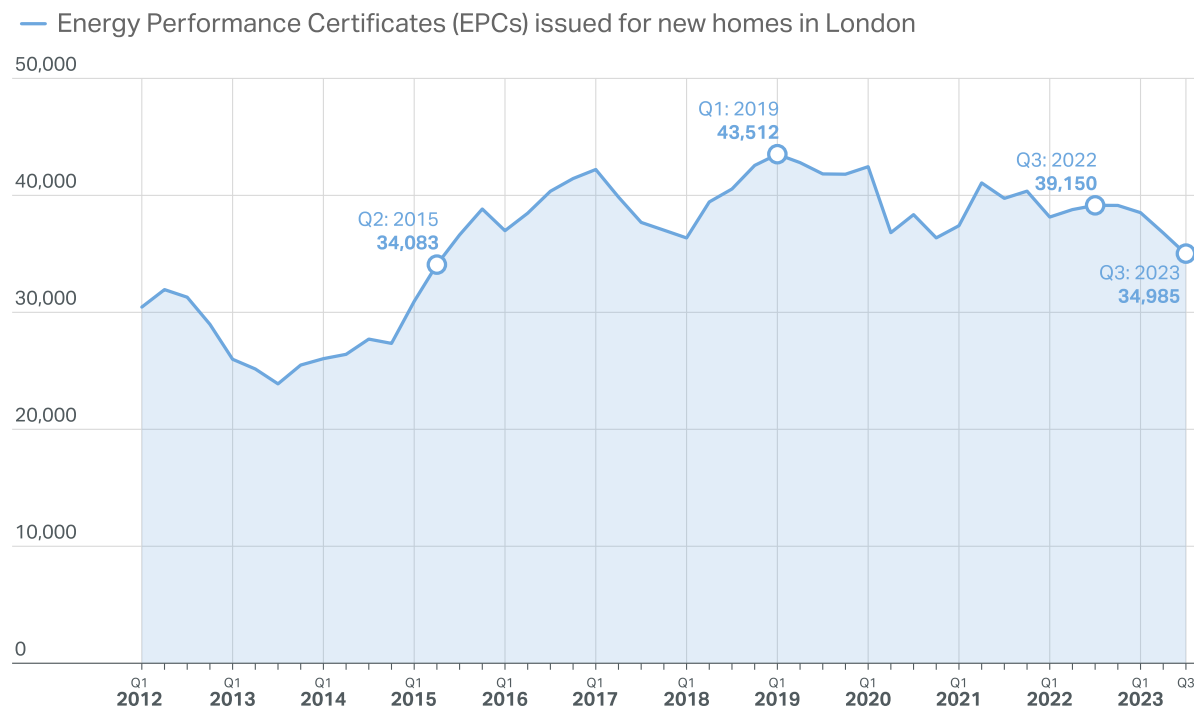
New housing supply in the year to September 2023 dropped by 11%. The annualised figure is the lowest since 2015. However, it should be noted that this reflects broader market trends, and is not simply a result of London-level realities.

Rent on new tenancies in London accounted for an average of 38.8% of tenant incomes in Oct 2023, up sharply from 34.9% in Oct 2022.

Possession claims by social and private landlords in London fell from 2019 to 2020, before increasing again over the following three years.

### **New housing supply (as measured by EPCs) in the year to September 2023 dropped by 11%. The annualised figure is the lowest since 2015.**

Annualised number of new homes completed in London (measured by Energy Performance Certificates registered for new dwellings)



Source: Department for Levelling up, Housing and Communities  
Graphic: GLA City Intelligence

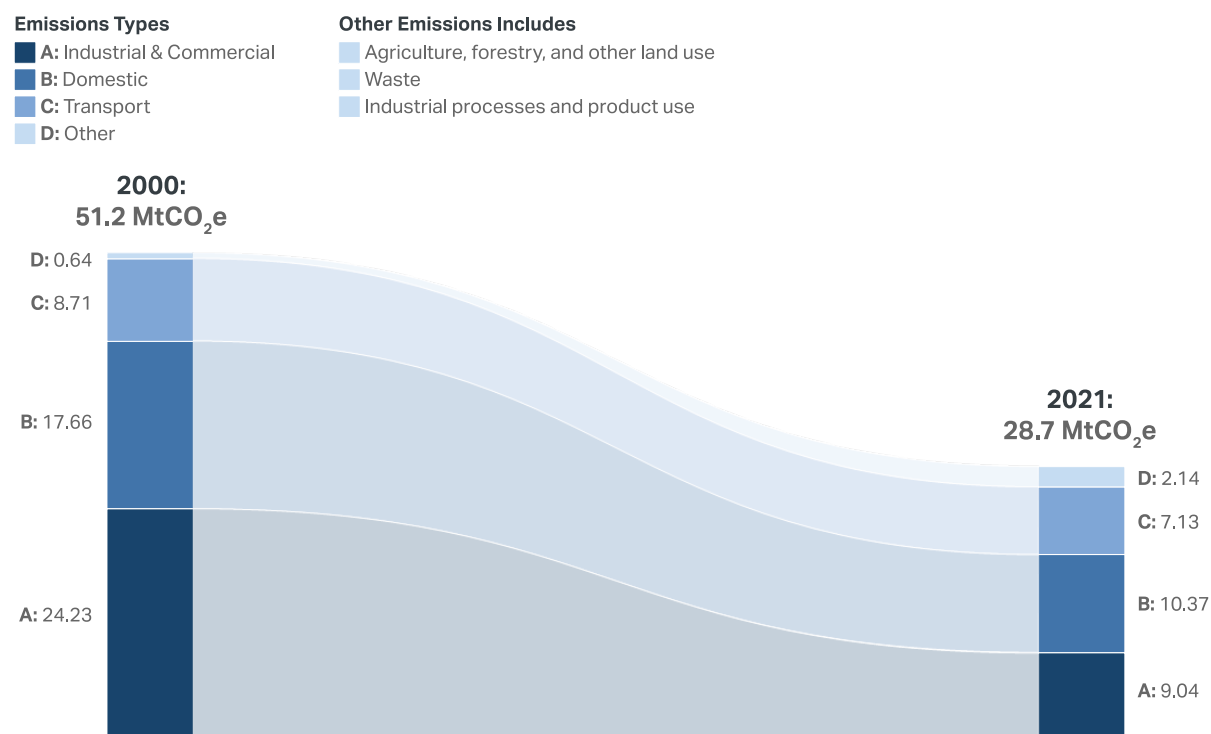
## Environment

London's annual greenhouse gas emissions in 2021 were 28.7 MtCO<sub>2</sub>e. This is a reduction of 44% compared to 2000, when London's emissions peaked.

Nitrogen Dioxide (NO<sub>2</sub>) concentrations in Central, Inner and Outer London have been decreasing since 2017, with Central London experiencing a more significant reduction due to policies such as the Ultra Low Emissions Zone (ULEZ) and reduced traffic during the COVID-19 pandemic.

### London's annual greenhouse gas emissions in 2021 had fallen by 44% since they peaked in 2000

Greenhouse gas emissions (MtCO<sub>2</sub>e) by sector in London, 2000 vs 2021



Source: GLA, LEGGI 2021 (Published 2023)  
 Graphic: GLA City Intelligence



## 4: DEMOGRAPHY

This chapter provides data and recent trends on London’s demographics. For more population statistics and analysis, including demographic projections, see the demography pages of the [London Datastore](#).

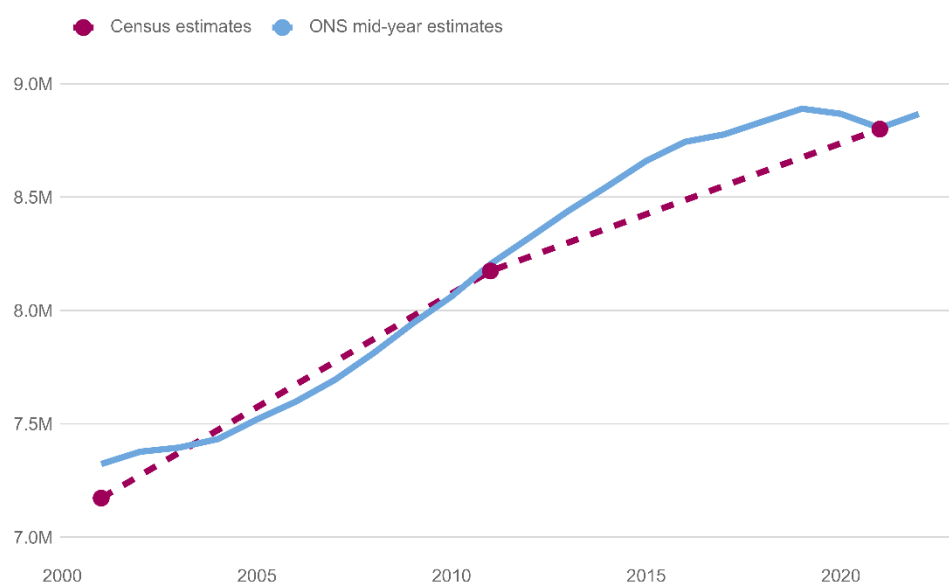
Detailed analysis of how London’s population changed during the pandemic can be found in the two-part report [‘Population change in London during the pandemic’](#).

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 2022**

Total population (millions)



Sources: [ONS Census estimates](#), [Population estimates for England and Wales - Office for National Statistics \(ons.gov.uk\)](#)

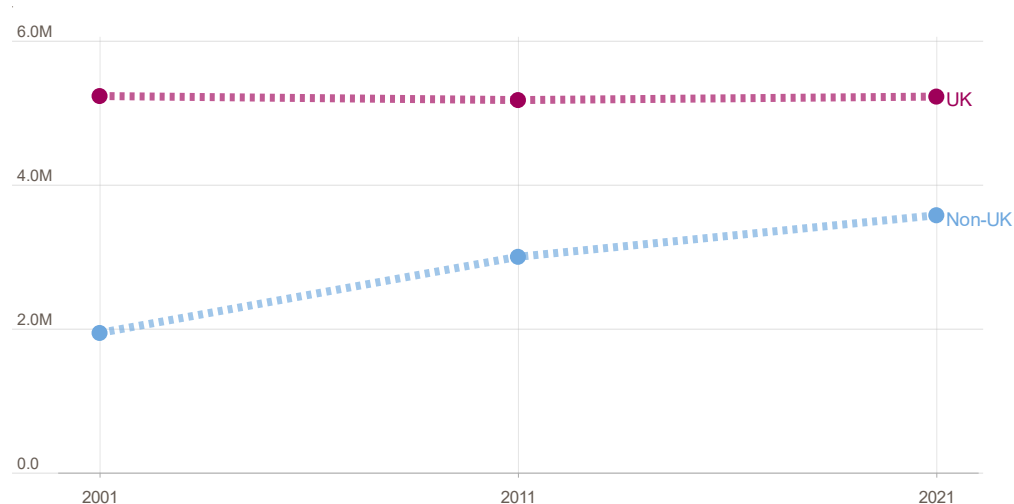
The 2022 mid-year estimates published by ONS in November 2023 gave London’s population as 8.87 million. Similar to what was reported in the previous edition of this report, this represents an increase in the population of almost 600,000 over the course of the decade, a far lower rate of increase than in the previous decade, when London’s population grew by more than 900,000.

The revised back-series of the mid-year estimates published by ONS in November (accounting for the results of the Census) revealed that previous official estimates

had become increasingly inflated over the course of the decade. The revised estimates indicated that London's population fell in both the years to mid-2020 and mid-2021, and increased in the year to mid-2022.

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

Total population (millions)



Source: [ONS Census estimates](#)

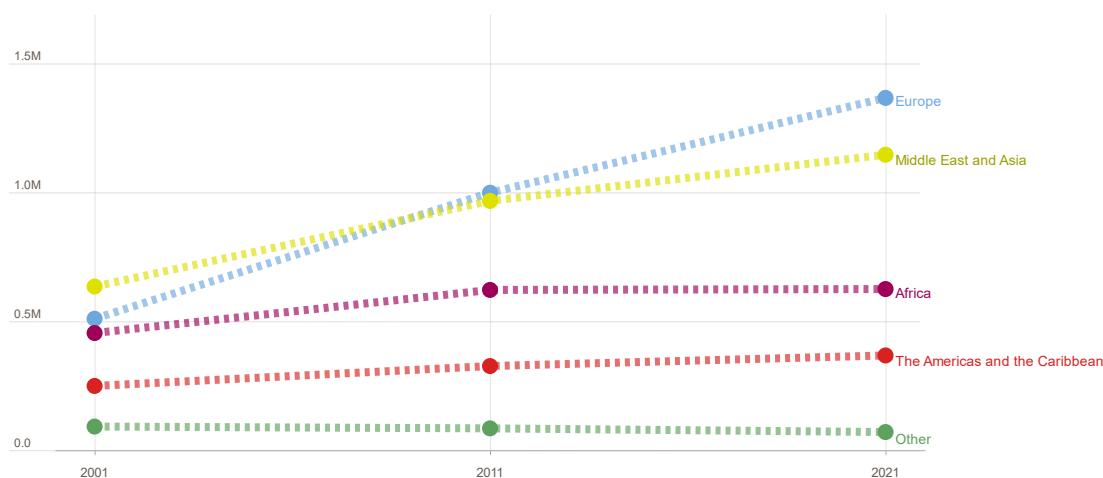
Data from the 2021 Census shows that 41% of London residents were born outside of the UK – up from 37% in 2011, and 27% in 2001.

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, 48,000 more than in 2011 and 8,000 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, 580,000 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 region of birth**

Total population (millions)



Source: [ONS Census estimates](#)

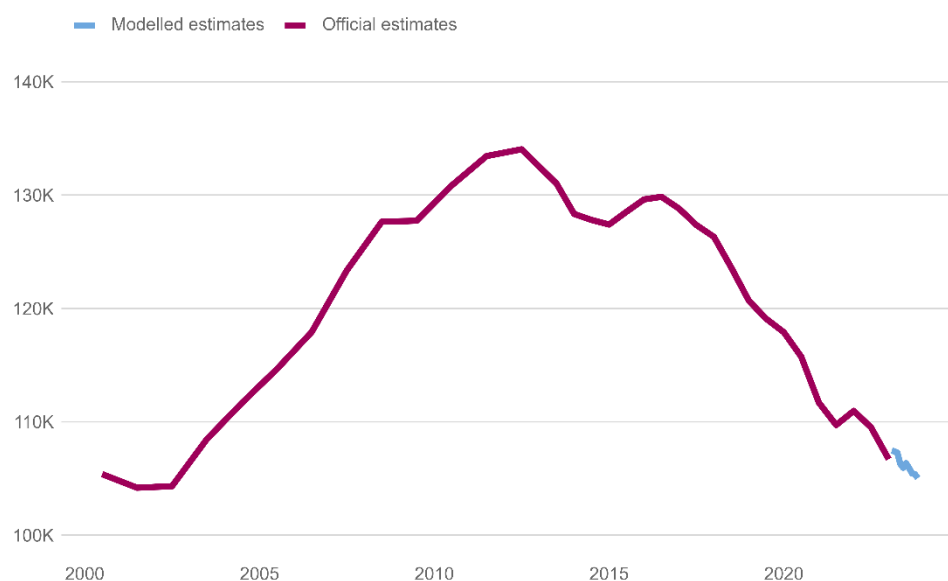
The data shows that most of the increase since 2011 is accounted for by residents born in Europe (up 37% from 999,000 to 1.37 million), and the Middle East and Asia (up 19% from 967,000 to 1.15 million).

Official estimates of [international migration](#) released in November indicate there has been a marked change in immigration since 2021. This can be attributed to the end of free movement for EU nationals, easing of travel restrictions following the COVID-19 pandemic, and the war in Ukraine. Since 2021, non-EU nationals were the largest component of total UK immigration, replacing EU nationals, the largest group until 2019. The recently released 2022 mid-year estimates assessed annual net international migration for London at 130,000, a considerable increase from 78,000 in 2021 and greater than the previous peak value in 2015 of 112,000.

## 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 134,000 in calendar year 2012. The latest official estimates for calendar year 2022 show 107,000 births, 20% below the 2012 peak.

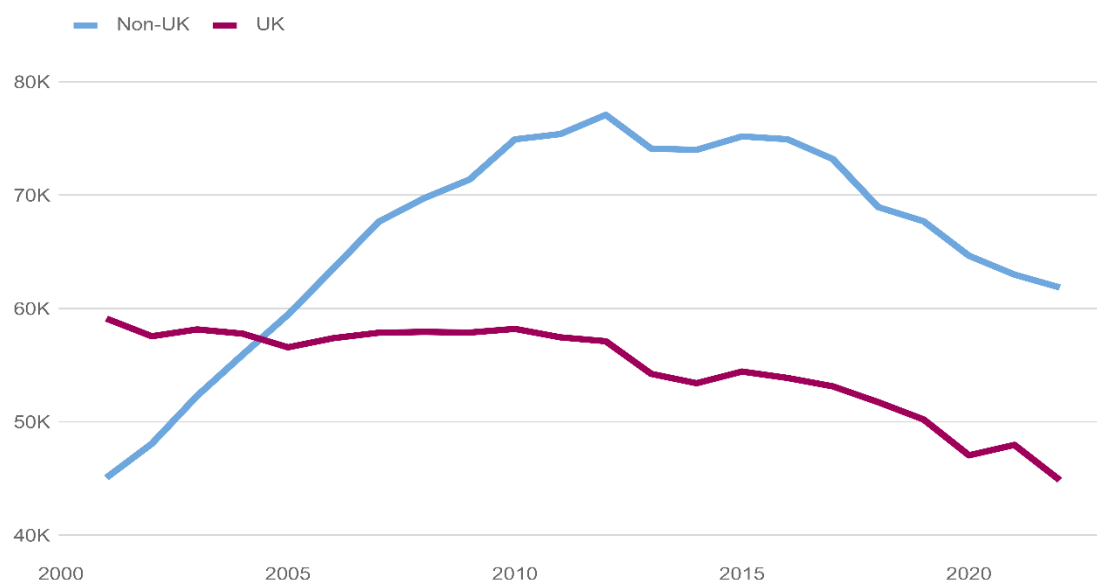
The estimates indicate that annual births fell at an increased rate following the start of the COVID-19 pandemic, reaching a low of approximately 110,000 in the year to mid-2021, before rising again. This reversal proved to be short-lived: annual births reached 111,000 in the year to January 2022, before 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 fewer births than would otherwise have occurred, followed by one with more births as postponed plans were finally realised.

The GLA produces monthly modelled birth estimates based on patient register data. These estimates can be produced with less lag than the official data and indicate that the downward trend in annual births has likely continued through 2023.

### Figure 5: Annual births in London by whether mother was born in UK 2001 to 2022

Annual live births by calendar year (thousands)

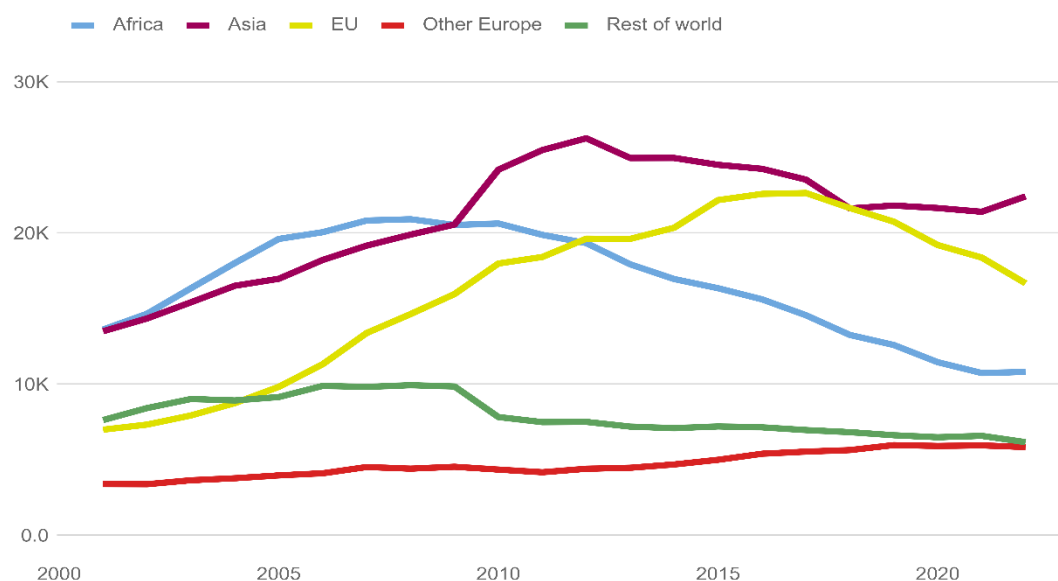


Source: [ONS Live birth estimates](#)

The latest official data on births released by ONS shows that of the 107,000 births in London that occurred in 2022, 45,000 (42%) were to mothers who were born in the UK and 62,000 (58%) to mothers born outside of the UK. This ratio is very close to 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 region of birth (excluding UK) 2001 to 2022

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 by world region.

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 19,000 in 2012 to just under 11,000 in 2022. Over the same period, births to mothers born in Asia have fallen by a smaller proportion, from 26,000 to 22,000. Nevertheless, births to mothers born in Asia represented the biggest fraction of London-based births to mothers born outside the UK in 2022.

Annual births to EU-born mothers rose steadily until 2016, when there were close to 23,000. This upward trend reversed following the Brexit referendum, with births in 2022 (of 17,000) back in line with those from more than a decade earlier.

## 5: THE ECONOMY & LABOUR MARKET

This chapter presents 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 mid- or late 2023. Some indicators, such as qualifications or employee jobs below the London Living Wage, are based on annual estimates that are updated less frequently.

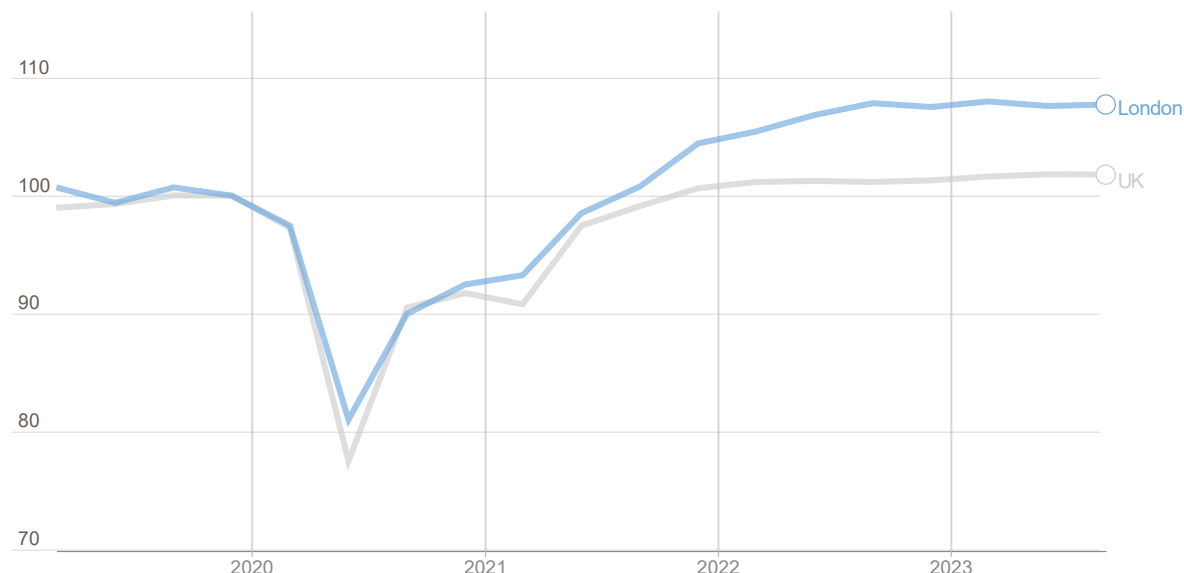
For more information on the state of London's economy, see the monthly GLA Economics publication, '[London's Economy Today](#)'. An assessment of future prospects for the city's economy, including economic forecasts, is provided in the bi-annual publication '[London's Economic Outlook](#)'. More detailed 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

Note: GLA Economics has estimated London figures for 2020 to 2023 Q1 in line with ONS quarterly regional statistics and revisions by ONS to national figures, and Nowcast figures to 2023 Q3. The Nowcast is a statistical prediction of what has happened prior to data becoming available

The ONS has recently revised upwards its national output figures for the period covering the pandemic and afterwards. GLA Economics has made a corresponding sector-level adjustment to ONS figures for London and developed a Nowcast for Q2 and Q3 2023. Current estimates suggest that London suffered less than initially thought during the pandemic, but that the capital recovered relatively strongly, while even by Q3 2023 the UK economy remained barely larger than pre-pandemic.

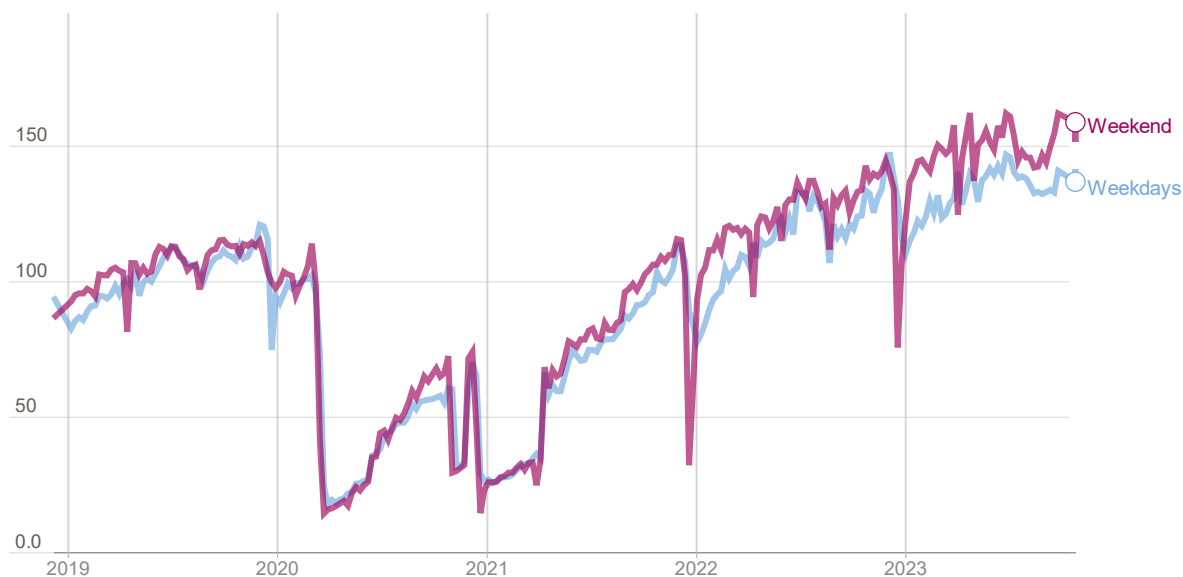
GLA Economics estimates that London’s GVA was up 7.7% in 2022, and 0.9% in 2023. This compares to long-run average growth for 2010-2019 of 3%. The cost-of-living crisis, a rising tax burden, and high interest rates are set to dampen the growth outlook.

Although it is likely that London is benefiting from the UK’s strong growth in service exports, we expect output growth to remain moderate, averaging 1.0% across 2024 and 1.6% in 2025. The strength of the labour market underlies the capital’s resilience, with workforce jobs growing by 3.5% in 2023. However, a sharp economic slowdown late in 2023 is set to sap the momentum, and jobs are expected to grow by just 0.1% in 2024 before improving to 1.1% in 2025.



### Figure 2: Weekly card spending on retail across London

Index, February 2020 = 100

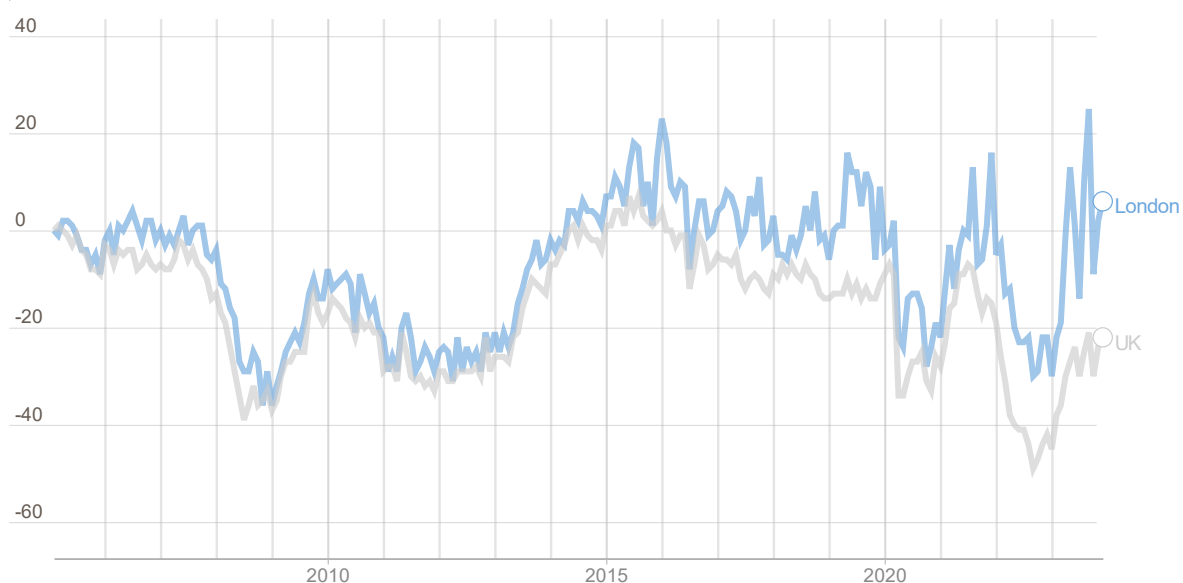


Source: [GLA City Intelligence](#), Mastercard's Retail Location Index. Note: Data adjusted for inflation and a pandemic-induced shift from cash to card transactions.

Mastercard data shows that after adjusting for 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 to their 2022 pre-Christmas levels. Weekend figures, meanwhile, have rebounded more. Overall, retail card spending has proven surprisingly resilient despite the damage to real incomes from inflation running at multi-decade highs.

### Figure 3: Consumer confidence in London

Confidence index, 0 = neutral



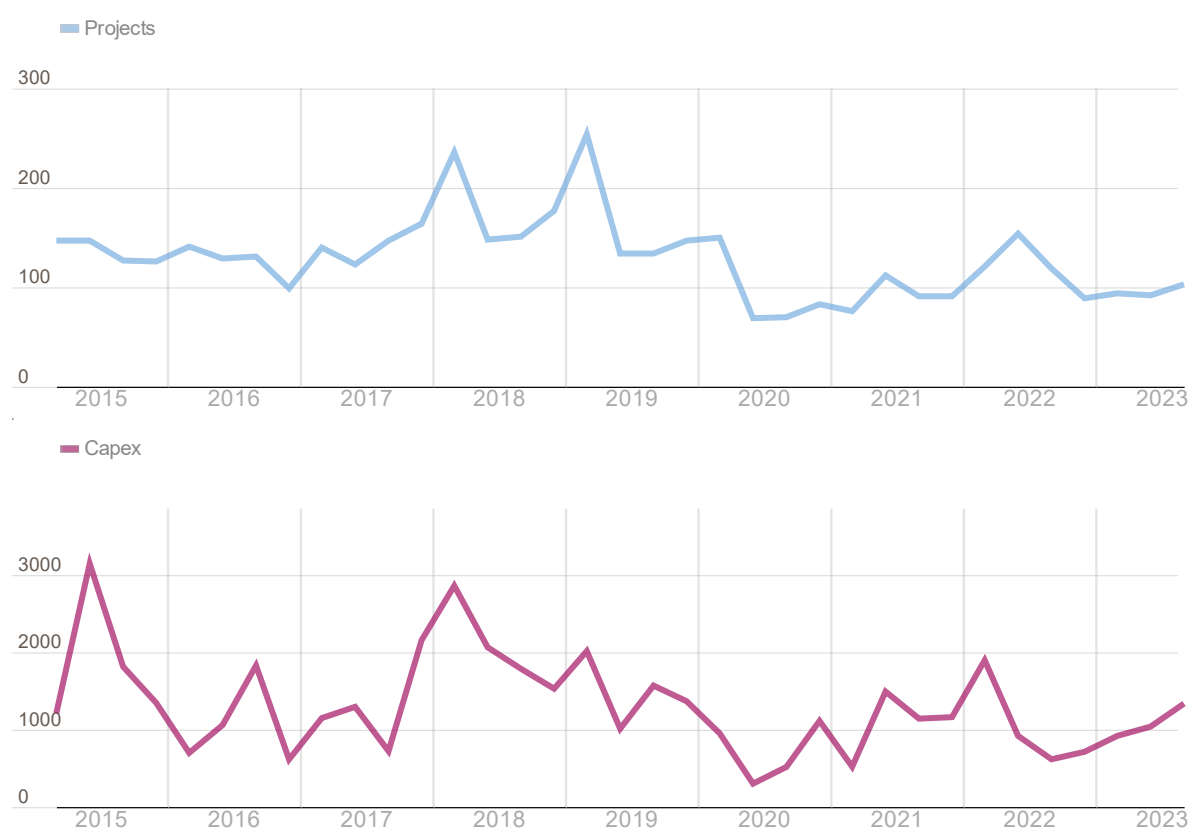
Source: GfK NOP

Consumer confidence in London has been volatile. There were troughs in 2020 and 2022. It improved sharply between January and May 2023, rising by the largest amount on record (from -30 to +13), and above the neutral mark of zero for the first time since December 2021. For the later part of 2023, consumer confidence has oscillated around zero, and was at 6 in December.

However, consumer confidence across the wider UK remained weak in December (at -22). While sentiment in the second half of 2023 has been consistently above the record low of -49 seen in September 2022, November's figure is also above averages at the height of the pandemic. 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

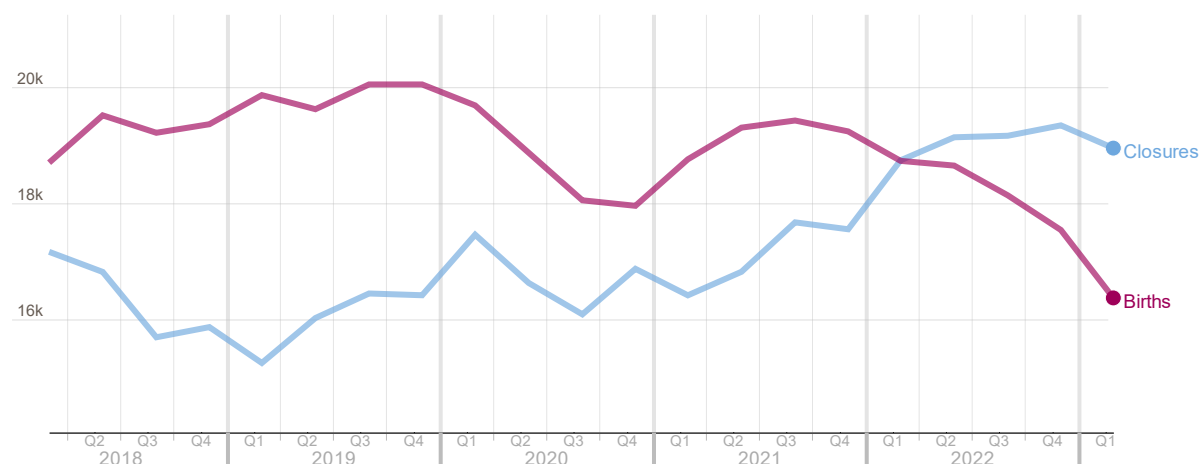
In July to September 2023, there were 103 new FDI<sup>18</sup> projects in London, worth £1.3bn in capital expenditure according to estimates by fDi Markets. In the five years before the pandemic, the average per quarter was around 150 new FDI projects, worth £1.5bn per quarter (all figures in cash terms).

<sup>18</sup> Data sourced from fDi markets live database and may be subject to revisions. Capex data are estimated values.

The latest quarterly figures show a recovery in FDI. Capital expenditure recovered to pre-pandemic levels (in cash terms) at the start of 2022; since then, the combination of weak growth and rising interest rates has dragged on levels of investment.

### 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 tended to exceed business closures<sup>19</sup>. Following a dip in both births and closures at the outbreak of the pandemic in 2020, both began to rise, suggesting a high rate of business churn.

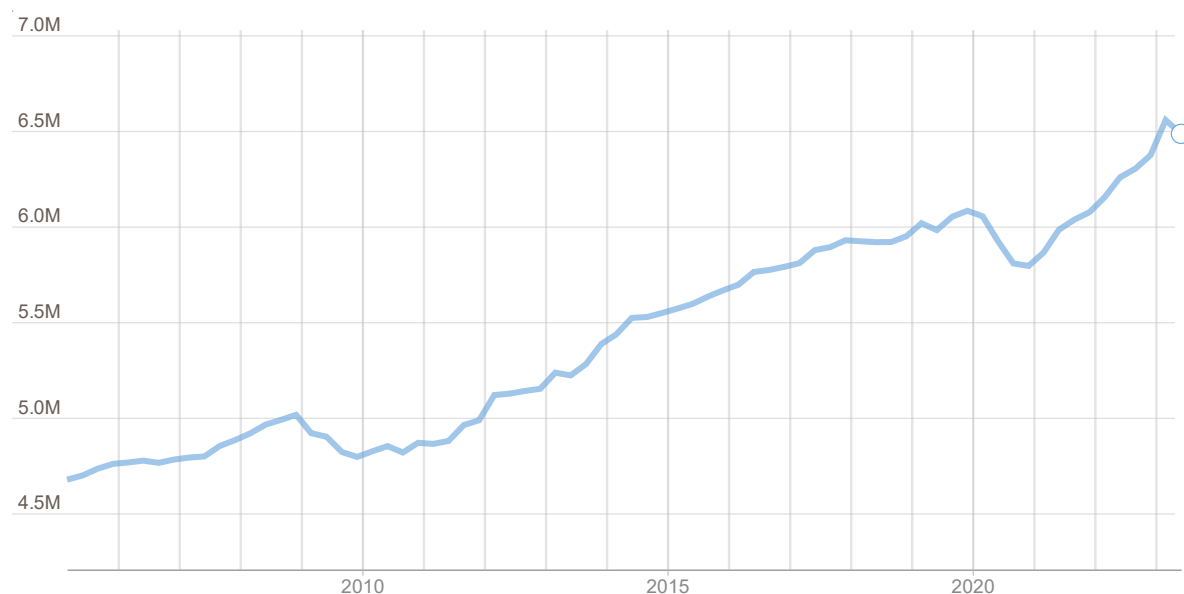
Since Q1 2022, London has seen more business closures than births, on a four-quarter rolling basis, reversing the trend since the series started in 2017. Since mid-2021, business births have declined, although most recently in Q3 2023 there was an uptick. In the year to Q3 2023, London has seen on average over 1,800 more businesses close than open per quarter, lower than the net closures of 2,400 in Q1 2023. Nationally, there was a positive net opening of businesses in Q3 2023, for the first time since Q3 2021.

<sup>19</sup> 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 June 2023



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.

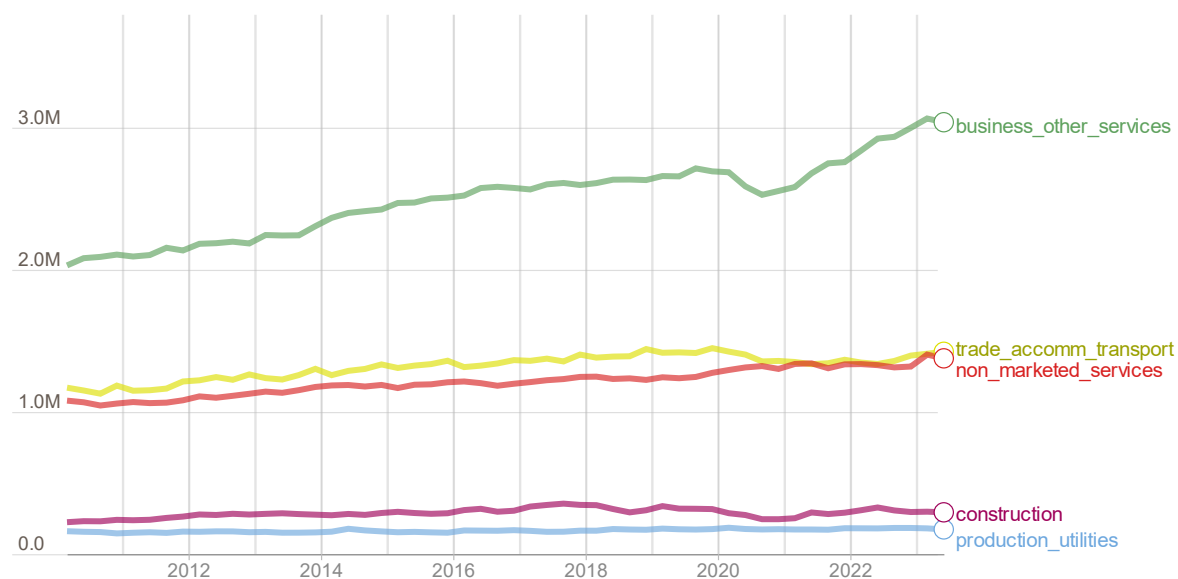
The Workforce Jobs series provides quarterly estimates of the number of jobs and is the ONS' preferred metric for jobs by region of workplace and industry.

The estimated number of workforce jobs in London reached 6.48 million in June 2023, up 6.6%, or 400,000 jobs, on the pre-pandemic December 2019 level. London accounts for 40% of the 995,000-job increase across the UK in that period.

However, the latest quarter for which data is available was the first since the pandemic to see a fall in jobs in London. The fall, of 70,000 jobs, was driven by a contraction in the more volatile self-employment jobs category (of 120,000), while employee jobs continued to rise.

### Figure 7: Workforce Jobs profile by broad sector

Number of jobs in sections A-S (millions), latest data for June 2023



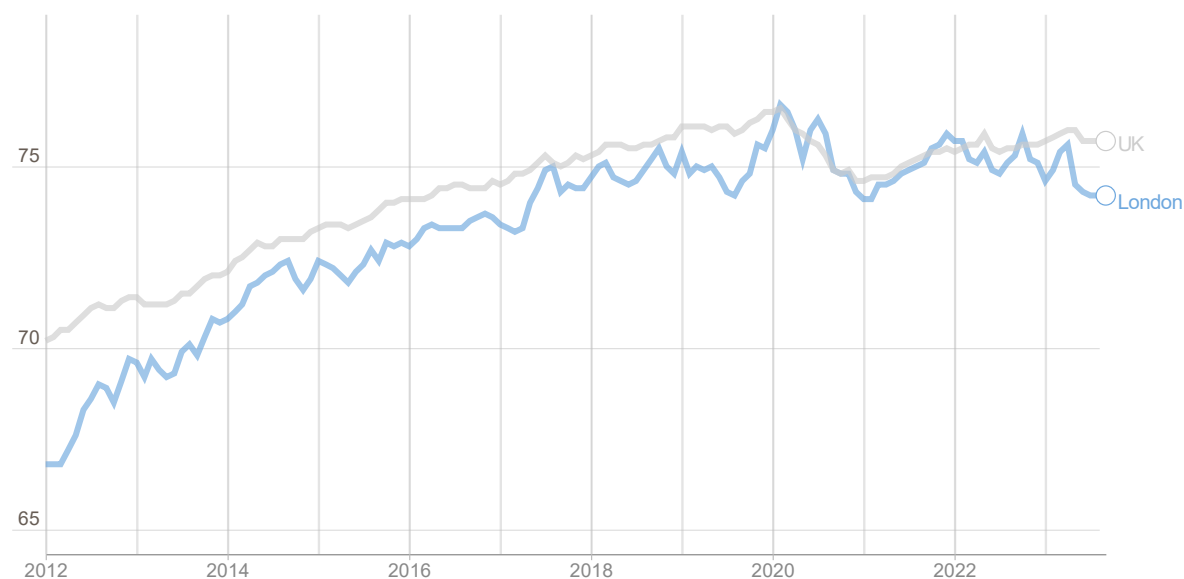
Source: GLA Economics analysis of [ONS Workforce Jobs](#) (via Nomis)

Over recent decades, the employment composition of London’s economy has seen a shift towards services and away from primary and production activities. By June 2023, there were 3.04 million jobs in business and other services, including professional and IT services, accounting for 48% of jobs in London, up from 43% in 2010.

There is also variation in how industry groups have evolved since the pandemic. The business and other services sector has continued to grow, with jobs up 13% since December 2019. But production, construction and the trade, accommodation and transport groups have still not recovered to their pre-pandemic level (although the hospitality sub-sector passed its pre-pandemic level for the first time in the latest data). Jobs in non-marketed service industries (i.e., health, education and public administration) are 8% above pre-pandemic numbers.

### Figure 8: Employment rate

% aged 16-64, latest data for period July-September 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.

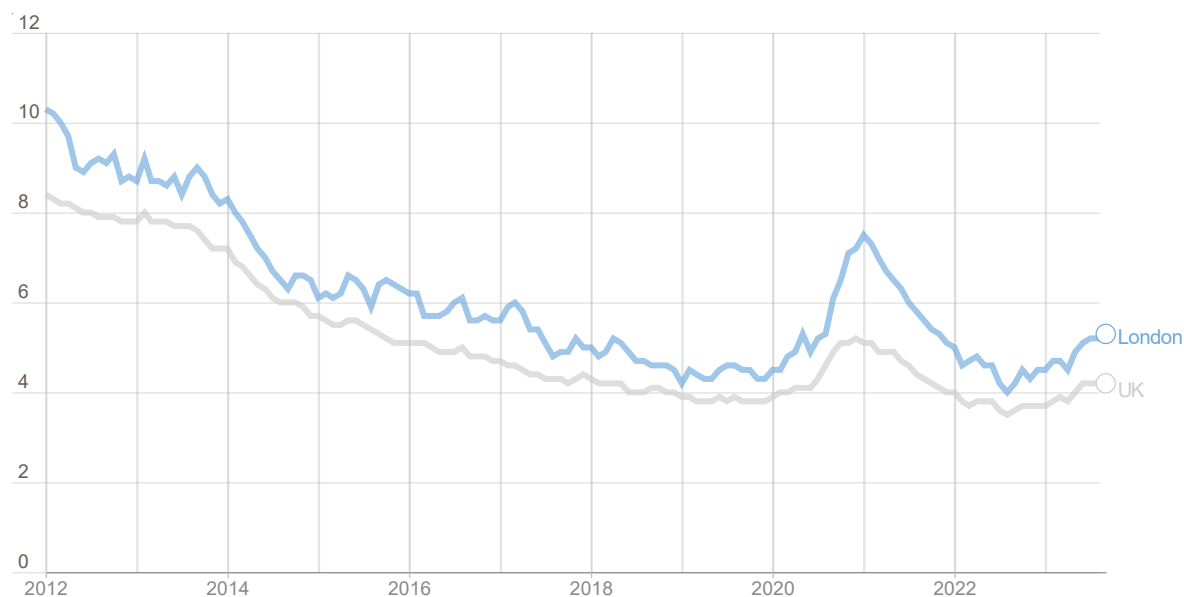
The employment rate is the proportion of people aged between 16 and 64 years who are in paid work or are temporarily away from a job. For the most recent months, we report ONS “adjusted rates”, which use administrative data to compensate for concerns about the underlying survey data.

For the three months to September 2023, the employment rate in London was estimated by the ONS at 74.2%. 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 July-September 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.

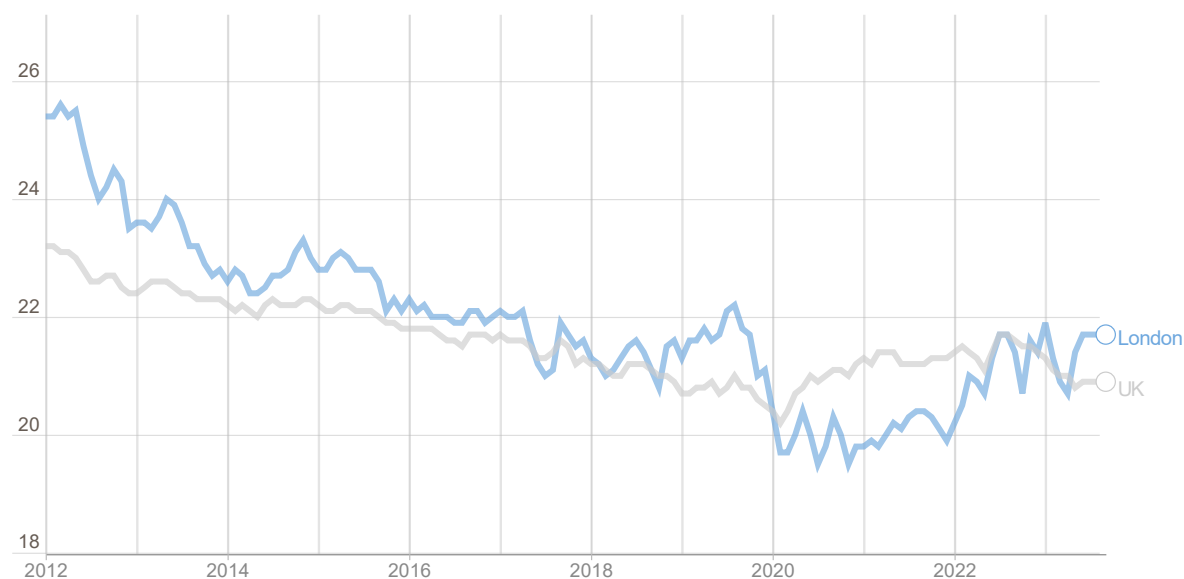
Unemployment measures people without a job who have been actively seeking work within the last four weeks and are available to start work within the next two weeks. For the most recent months, we also report ONS “adjusted rates” as for employment rates.

Unemployment has been inching up for over a year as tight monetary policy to control inflation weighs on the labour market. The rate increased to 5.3% (up 0.2pp on the previous quarter and 1.1pp on the year) in the three months to September, meaning that 265,000 Londoners were without a job while seeking work and available to start. The Claimant Count measure had risen to over 300,000 people in London for the first time since March 2022, and is rising faster than in the rest of the UK.

The UK unemployment rate is typically lower than in London (4.2%). This figure is flat on the previous quarter and up 0.6pp on 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 September 2023, the rate of economic inactivity in London was estimated by the ONS at 21.7%, unchanged on the previous quarter and 0.3pp up on the previous year. This means there were around 1.34 million working age Londoners not looking for or unable to work, a number largely unchanged since the same period in 2019 (1.33 million).

At 20.9%, the UK-wide rate of economic inactivity was close to the London rate. This was flat on the previous quarter and down on the previous year (-0.6pp).

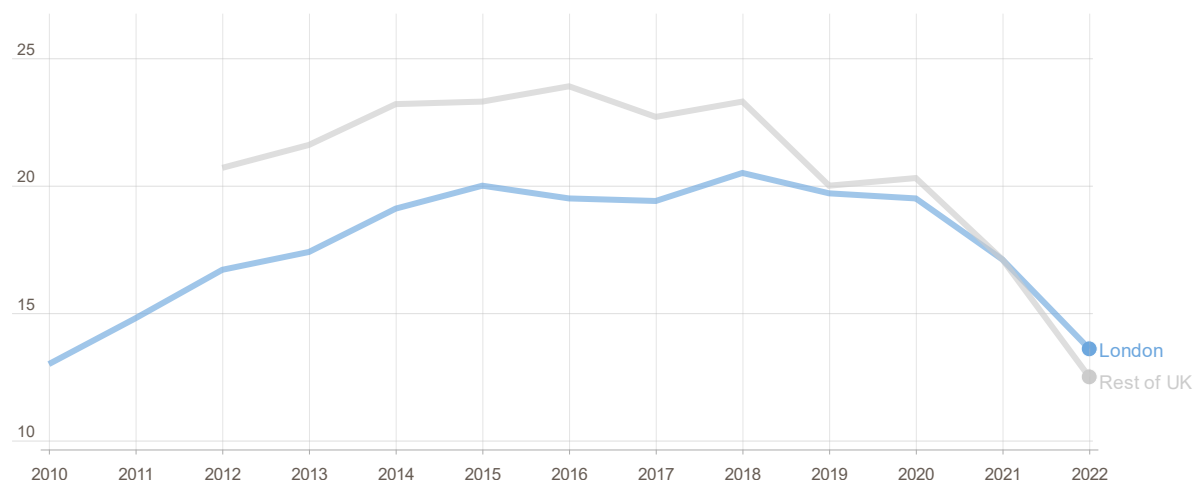
Looking across the latest available 12-month period (July 2022-June 2023) and comparing to full-year 2019, the inactive working age population of London was 25,000 people smaller. There were more inactive students (+17,000), retired (+12,000) and temporary sick (+22,000) but fewer looking after family/home (-62,000) and long-term sick (-11,000).

The rest of the UK by contrast has seen a large rise (+345,000) in the number of people inactive due to illness, with an additional 303,000 long-term sick and 42,000 temporary sick.



### 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 tended to increase faster than inflation and general pay rises, although inflation has risen more sharply recently (i.e., since late 2021).

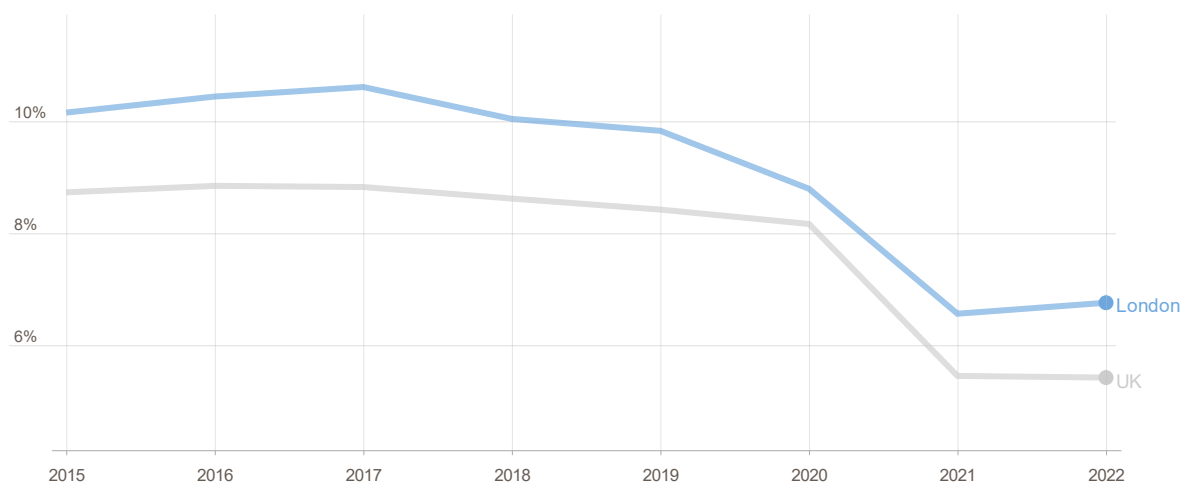
Around 14% of employee jobs in London were paid below the London Living Wage in April 2022, a higher share than the proportion of employee jobs paid below the UK Living Wage in the rest of the UK (13%). This is the first year that London’s rate has been above the UK’s rate since 2012. This reflects the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

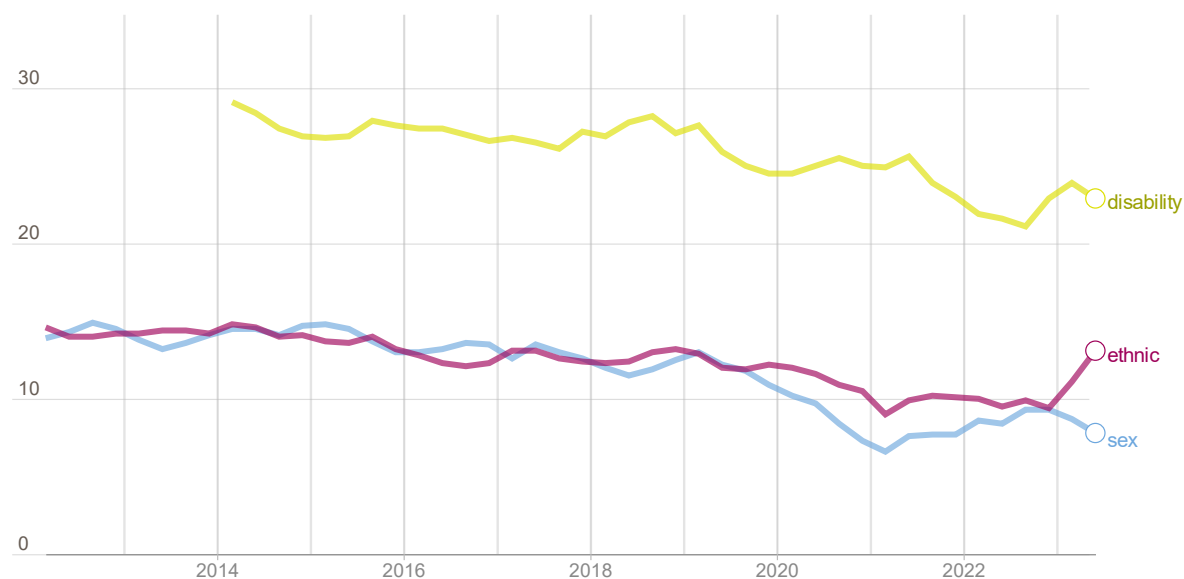
The measure of insecure work used here covers those either employed in a job with a temporary contract, those working through an employment agency, or those who are self-employed in occupations generally considered insecure (such as caring, leisure or other service occupations, process plant and machine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

### Figure 13: Employment rate gaps

Percentage points difference, latest data for period July 2022-June 2023



Source: ONS Annual Population Survey.

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

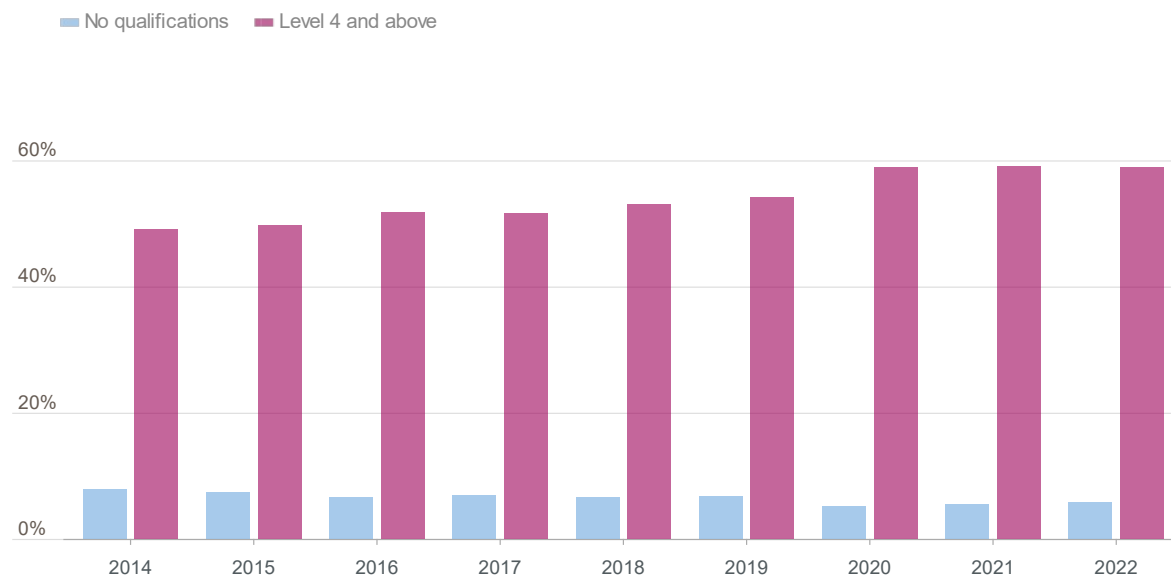
The latest gap between all White Londoners and Londoners from all other ethnic backgrounds combined has risen sharply in 2023 to 13.1pp after previously being on a declining trend. The rate gap is also much bigger now than the national average (8.4%) although that national rate gap is also rising.

The latest gap between Londoners with disabilities and Londoners without disabilities is 22.9pp. This is below the national average (26.1pp) but has risen since falling to a near-decade low in 2021. The gap between male and female employment rates in London declined to 7.8pp in 2023 after rising in the immediate post-pandemic period.

## Skills

**Figure 14: Proportion of people with Level 4 or above and with no qualifications in London**

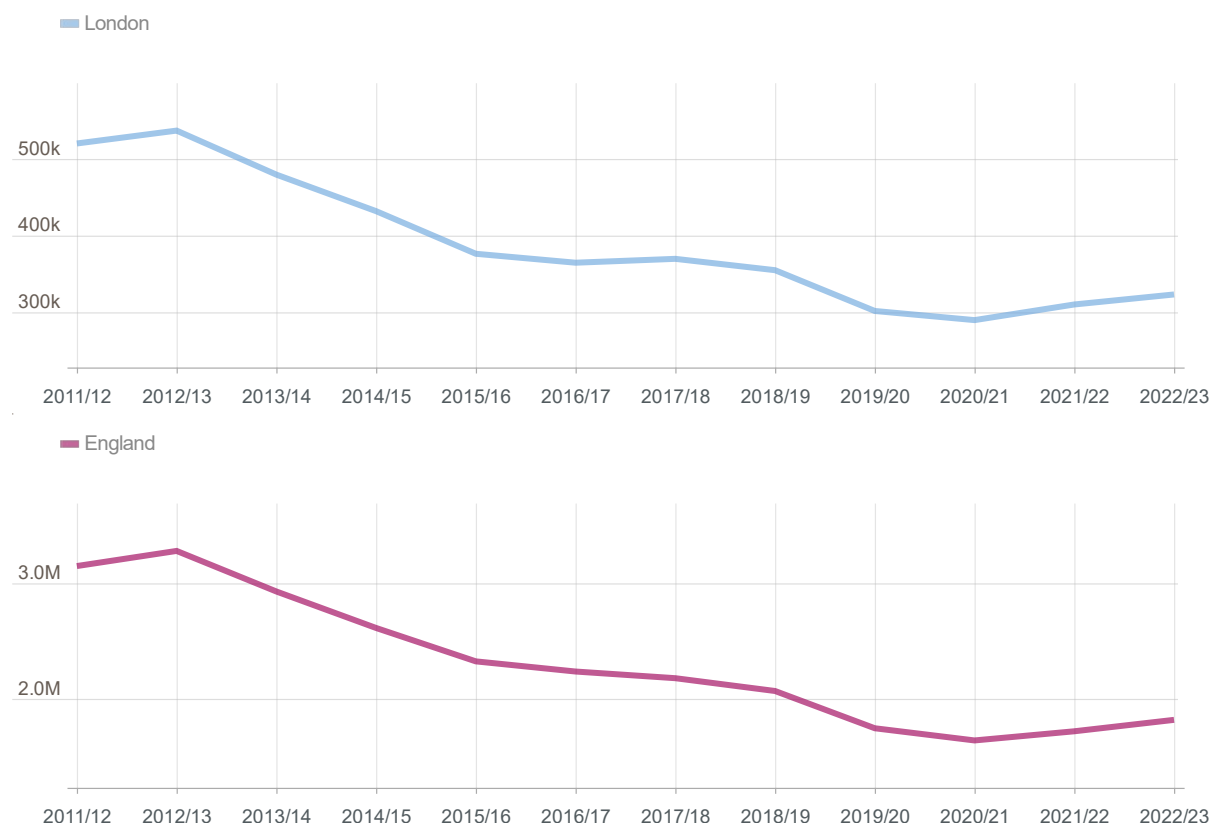
% aged group 16-64, latest data for period Jan 2022-Dec 2022



Source: ONS Annual Population Survey, 2014-2022. Notes: From 2022 the qualification framework presented in the data moved from the National Vocational Qualifications (NVQ) to the Regulated Qualification Framework (RQF) framework

In London, the proportion of people with higher level qualifications has been increasing over time. It is 10 percentage points higher in 2022, compared to 2014. The latest data available shows that more than half (59%) of the 16-64 population hold a degree or similar qualification (Level 4 or above) in the capital, while around 6% had no formal qualifications in 2022, down from 8% in 2014.

**Figure 15: Further education and skills 19+ participation, London and England**  
2011/12 to 2022/23



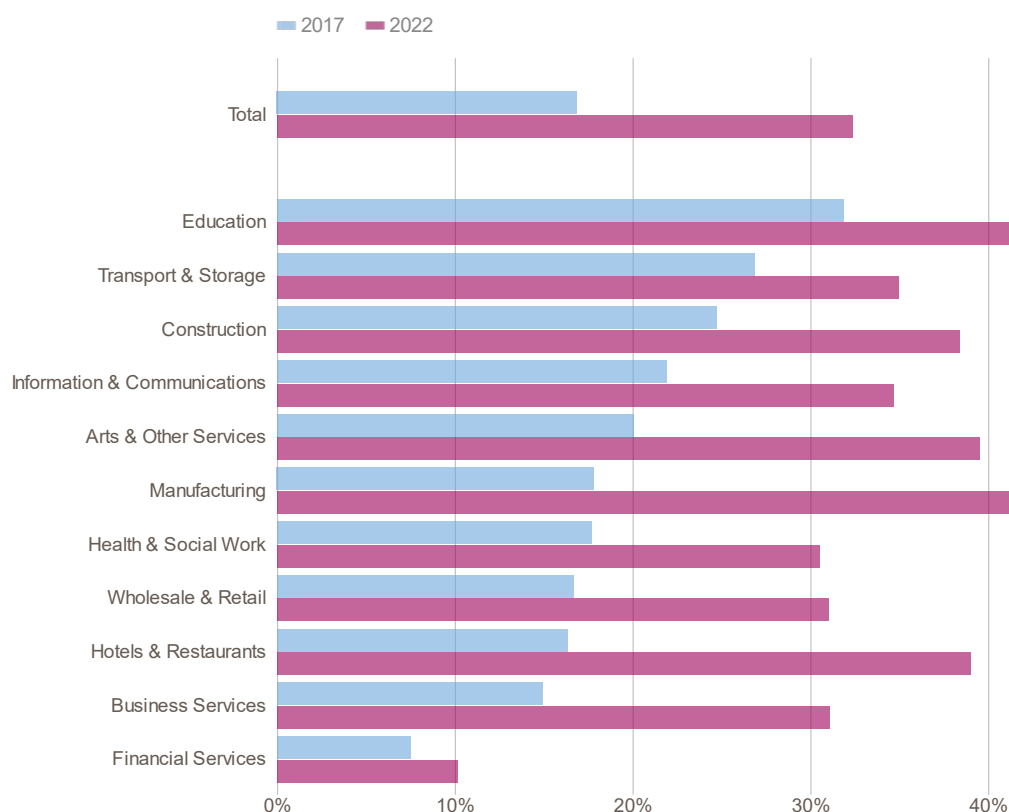
Source: Department for Education.

Since 2017, participation<sup>20</sup> in Further Education (FE) and skills training among adults has fallen sharply across both London and England. This trend was further exacerbated by the pandemic. There has been an improvement in participation since delegation of the Adult Education Budget in 2019. Participation in London increased from 290,000 to 323,000 between academic years 2020/21 and 2022/23, a rise of 11.5% over the period compared to 10.9% in England.

<sup>20</sup> Participation refers to the number of people who have attended one day or more on a learning aim in the given academic year. Any learner studying more than one aim, at the same provider, at the same level is counted once at that level.

### Figure 16: Skills-shortage vacancies as a proportion of all vacancies

By industry, London, 2017 and 2022



Source: Department for Education, Employer Skills Survey 2017 and 2022

Skills-shortage vacancies refer to vacancies that employers struggle to fill due to a lack of skills, qualifications or experience amongst applicants. The share of skills shortage vacancies, amongst all vacancies in London, increased significantly between 2017 and 2022, from 17% to 32%. This is affecting all industries in London over the period, with the largest increases observed in Manufacturing, Hotels and Restaurants, Arts and Other Services and Business Services. Some of these sectors also happen to have experienced labour-market shortages in recent years.

## 6: INCOME, POVERTY & DESTITUTION

This chapter covers income, poverty and its most extreme form – destitution. These issues are fundamental to the wellbeing of Londoners and central to many Mayoral 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 the Board’s missions which include creating a [Robust Safety Net](#) and [Helping Londoners into Good Work](#).

Further information 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 household members (e.g., earnings, benefit income, pensions and investment).

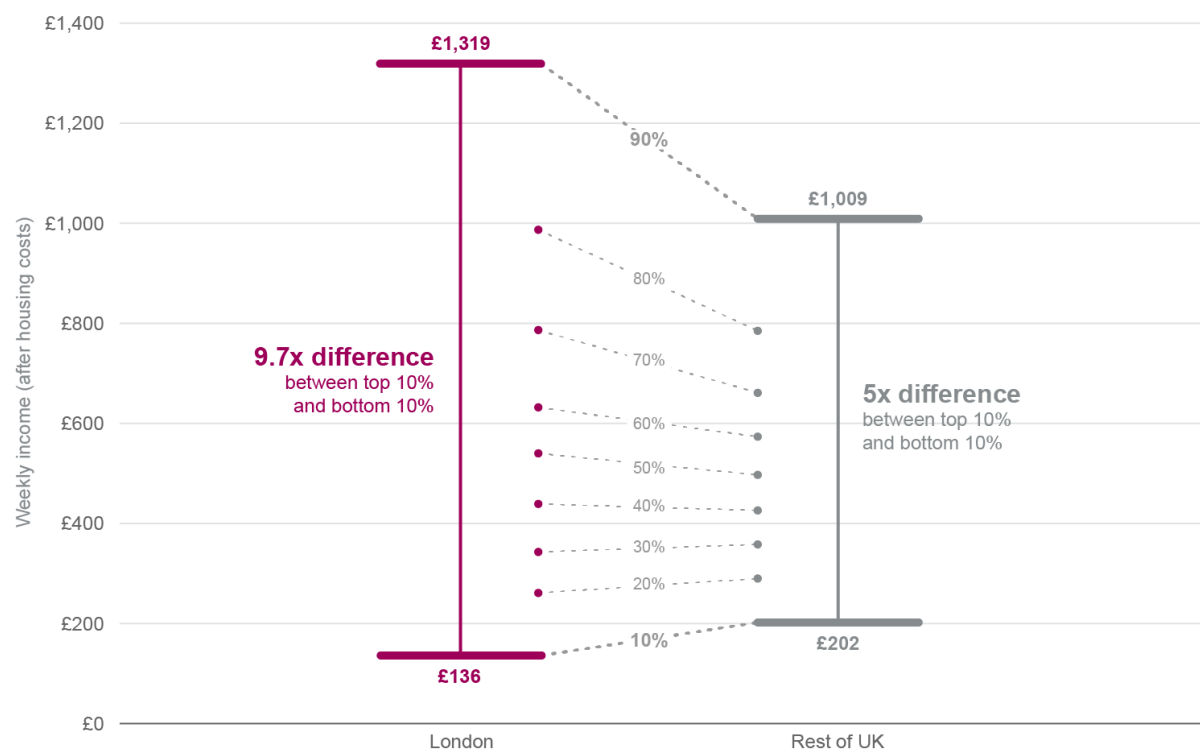
The definition used here is equivalised net income after housing costs. This allows us to compare the income available to people living in different household types after paying direct taxes (income tax and National Insurance) and housing costs (including rent, mortgage interest, and Council Tax). This 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 “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 than elsewhere in the UK. Data for this indicator are unchanged from the previous version of the report as the most recent datapoint available is for 2021/22. Median equivalised income after housing costs for a couple in London was £540 per week for 2019/20-2021/22<sup>21</sup>, 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.

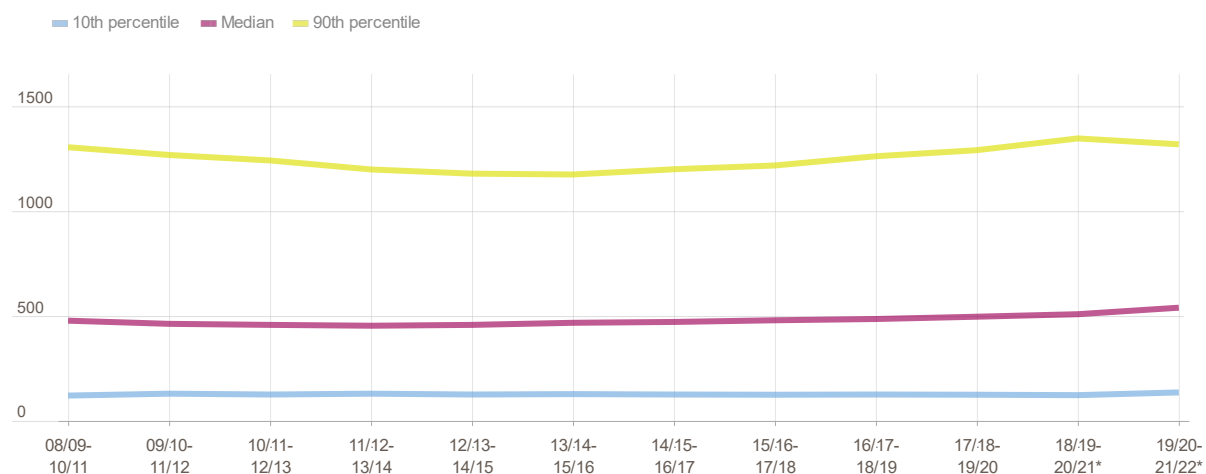
Incomes for Londoners at the lowest decile are 30% below those at the lowest decile for the rest of the UK, while incomes at the highest decile are 30% higher. Overall, the ratio of income at the top to bottom decile (known as the 90:10 ratio) is 9.7 for London, nearly twice that for the rest of the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

<sup>21</sup> 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](#) 3-year average<sup>22</sup> median equivalised income AHC indexed to 2021/22 prices

Income after housing costs at the lowest decile in London has been stable in real terms for more than a decade, with the latest estimate being marginally higher (£136).

Over the same period, income for the highest decile fell between 2011/12 and 2015/16, but has risen in more recent years. The 90:10 ratio fell from 10.8 to 9.2, before rising again; the latest estimate 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 the UK median. This measure captures all income sources and covers an entire household. However, the data are annual and lagging, and have increased uncertainty for recent years due data-collection issues during the pandemic.

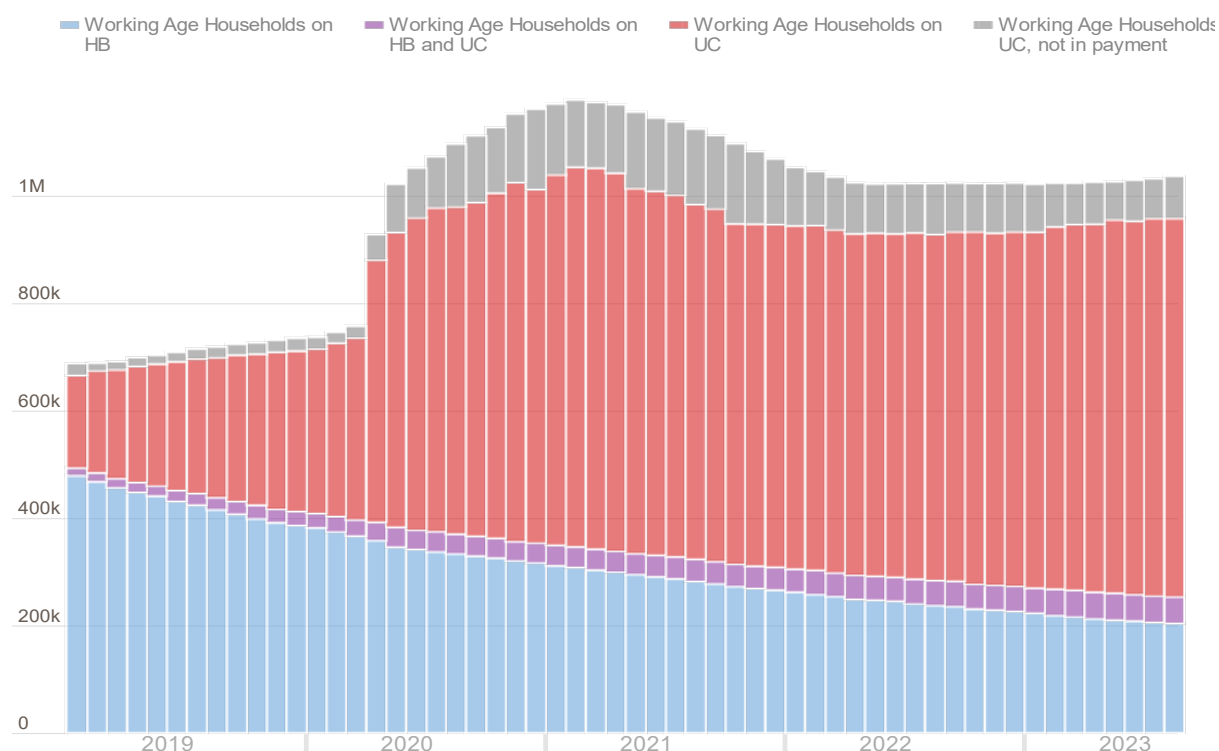
Administrative data on means-tested benefits can be used to give a timelier proxy. Data on Universal Credit (UC) claims can be combined with data on Housing Benefit (HB) claims to provide a broader view, although some people are still moving across to UC from other, older legacy benefits. UC is only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

This section also looks at persistent poverty. This is defined as living in a low-income household in the latest year and at least two of the previous three years. People in this situation are least likely to participate fully in society and achieve a healthy lifestyle.

<sup>22</sup> London data for 2020/21 are not available, so the estimates including that year are averages of the two remaining time points.

### Figure 3: Working age London households on means tested benefits

Households claiming one or both of the two main means-tested benefits in London



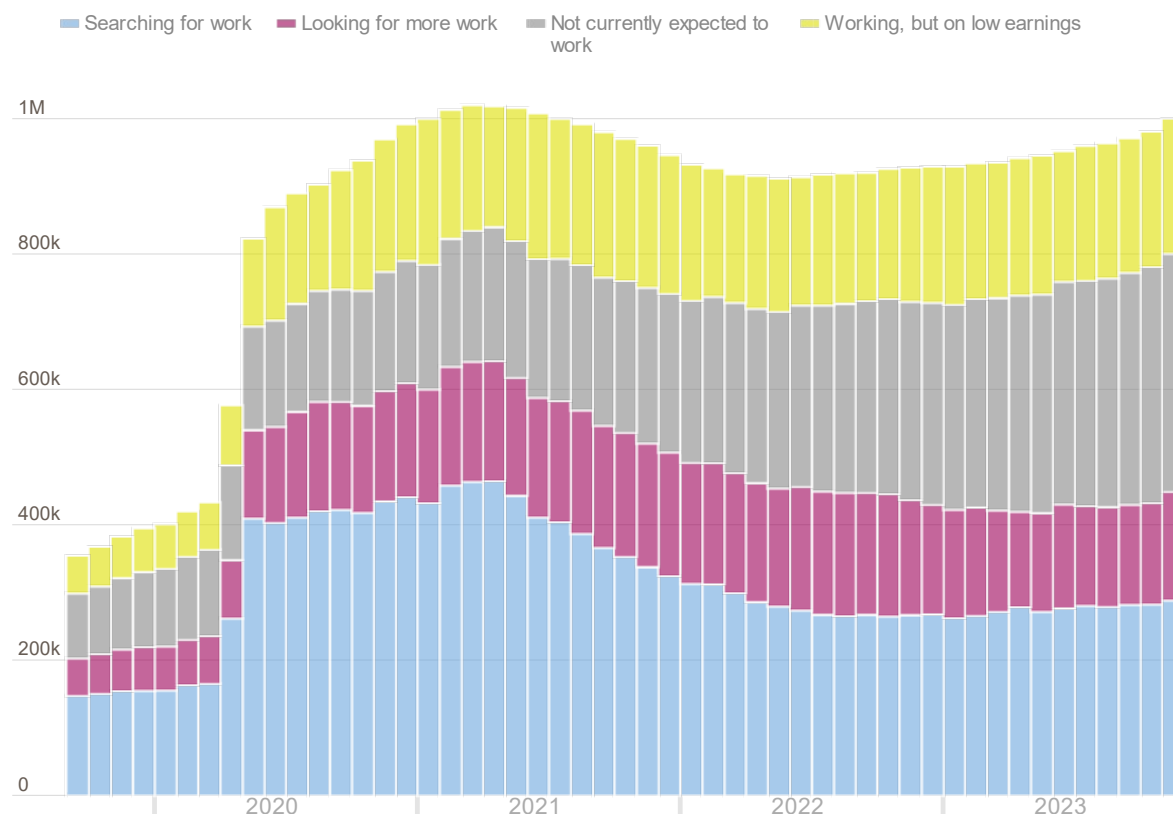
Source: [DWP Benefits data via Stat-Xplore](#)

Figure 3 shows that by August 2023, the numbers of households in London with working-age adults claiming one or both the main means-tested benefits had been stable since the end of the Coronavirus Job Retention Scheme in Autumn 2021, with just over a million households claiming UC and/or HB per month but around 950,000 receiving a payment. Within that total, the number claiming HB is reducing over time. More than half of claimants are single without children, while a third are lone-parent households.

Around 28,000 London households had their payments capped in August 2023, nearly two-thirds of them lone-parent households. This total is down from over 60,000 households in March 2021, falling sharply when the £20 UC uplift ended in October 2021, and then again between April and May 2023. That coincided with the raising of the benefit cap threshold while Local Housing Allowance levels did not increase. The number of households impacted by the benefit cap increased marginally between May and August.

### Figure 4: Londoners claiming Universal Credit by work status

Summarised work conditionality status of people on Universal Credit, Sept 2019-Nov 2023



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

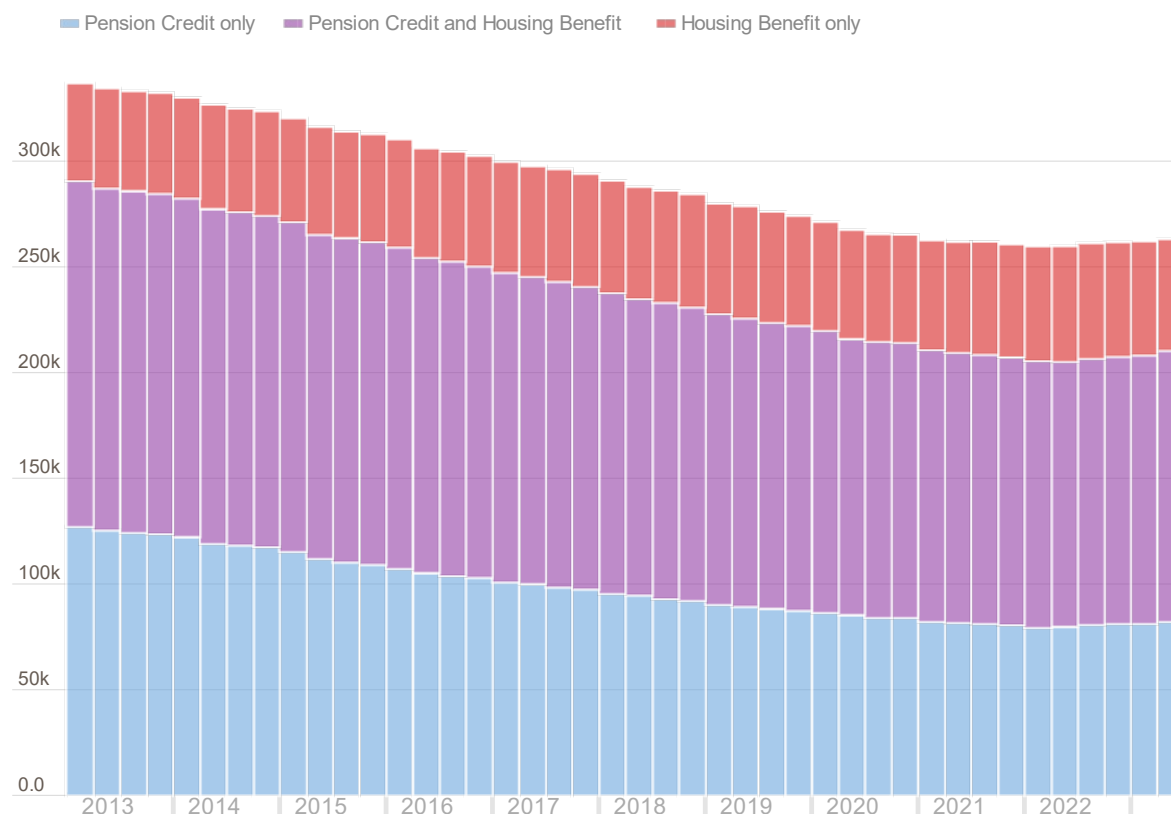
The reduction in number of UC claimants in London seen to mid-2022 has reversed, climbing back to almost one million by November 2023 after sharply increasing (by 7%) compared to October. Within this, there were rising numbers of claimants out of work and searching for work<sup>23</sup>, while fewer were seeking additional work.

The number of claimants not expected to work accounts for the entire increase since mid-2022, which likely reflects changes in the welfare system (as UC replaces previous benefits), rather than a real increase in numbers.

<sup>23</sup> 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) with low income can claim PC rather than UC.

The numbers claiming one of these benefits reduced over nearly two decades, and not only because of the rise in pensionable age. Almost a third of pensioners<sup>24</sup> in 2013 claimed PC and/or HB, but this decreased to a quarter in 2022. The numbers have risen marginally since mid-2022.

Most PC recipients get an amount to top up their overall income to a guaranteed level. Out of a total of around 190,000 receiving PC, fewer than 50,000 have additional savings or pensions that increase the PC amount they receive. Many also receive HB, but not all receive a State Pension. Fewer than 55,000 claim HB but not PC.

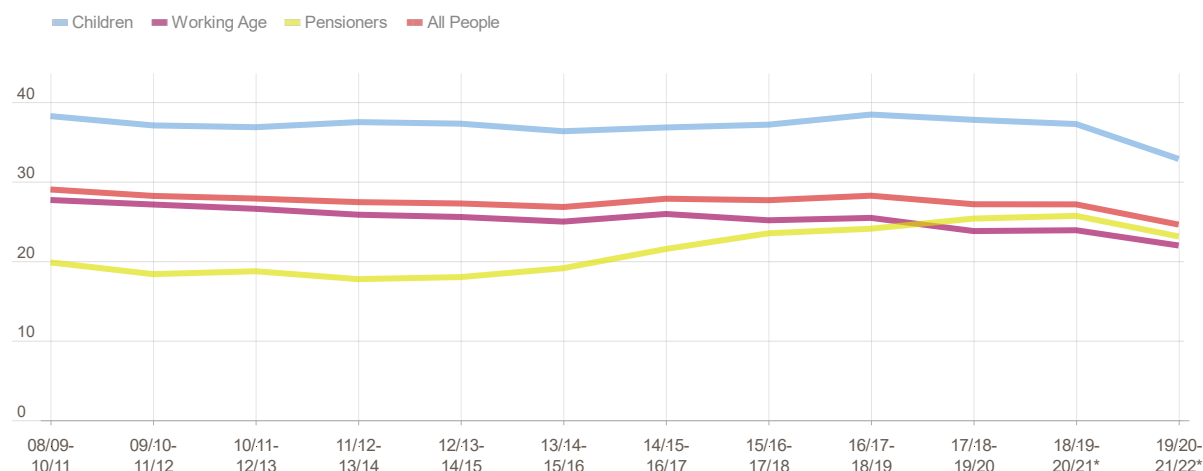
59% of PC claimants are female with no partner, compared with 27% being male with no partner. The remainder (14%) are Londoners with a partner<sup>25</sup>.

<sup>24</sup> All people of state pensionable age on the DWP database receiving at least one benefit, which may include State Pension. Not all residents over SPA are claiming benefits, so this is not a full count of the resident population aged over SPA.

<sup>25</sup> <https://data.london.gov.uk/dataset/benefits-analysis>

### 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 fell significantly in the latest estimate (25% of the population, or 2.2 million Londoners, live in households with less than 60% of UK median income after housing costs). That is the lowest percentage in London since the measure was introduced in the mid-1990s. Nevertheless, the number is still higher than pre-2008 levels. That said, there is increased uncertainty around the latest estimates due to data issues.

The 2019/20-2021/22<sup>26</sup> estimate is the first since 2000 where London does not show a higher poverty rate than other parts of the UK, with the West Midlands and North East showing higher poverty incidence<sup>27</sup>.

The proportion of London’s children living in poverty has generally been higher than elsewhere in the UK, but the latest estimates show a drop to 33% in London and increases in some other regions. The child poverty rate also decreased in Inner London, but at 38% remains relatively high.

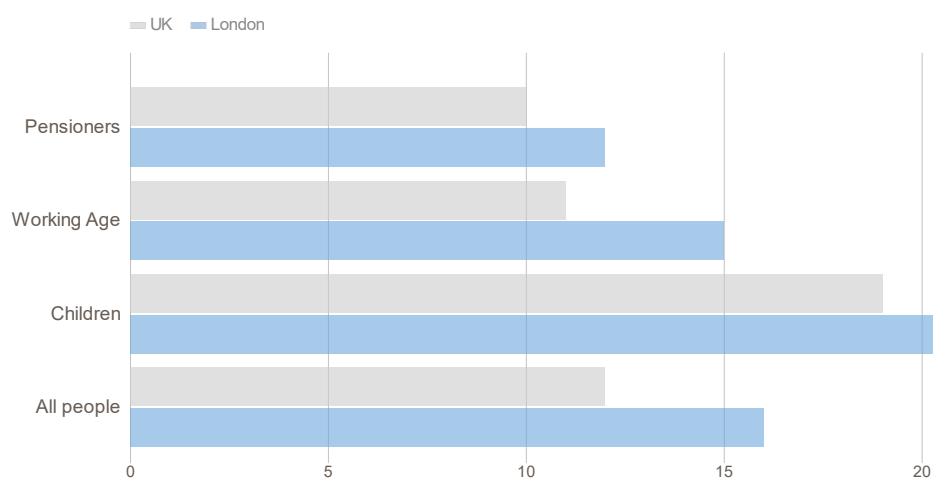
Meanwhile, poverty rates among London’s pensioners had been climbing prior to the pandemic but have also dropped in the latest estimate. Pensioner poverty rates for London remain higher than other UK regions.

<sup>26</sup> Regional data for 2020/21 are not available, so the estimates including that year are averages of the two remaining time points

<sup>27</sup> Due to difficulties conducting surveys during the pandemic, there is greater uncertainty in all estimates, 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<sup>28</sup>. 75% of London’s children in poverty are in persistent poverty – or 24% of all children (500,000). This is much higher than for the UK, and pushes the proportion of Londoners in persistent poverty well above the national average.

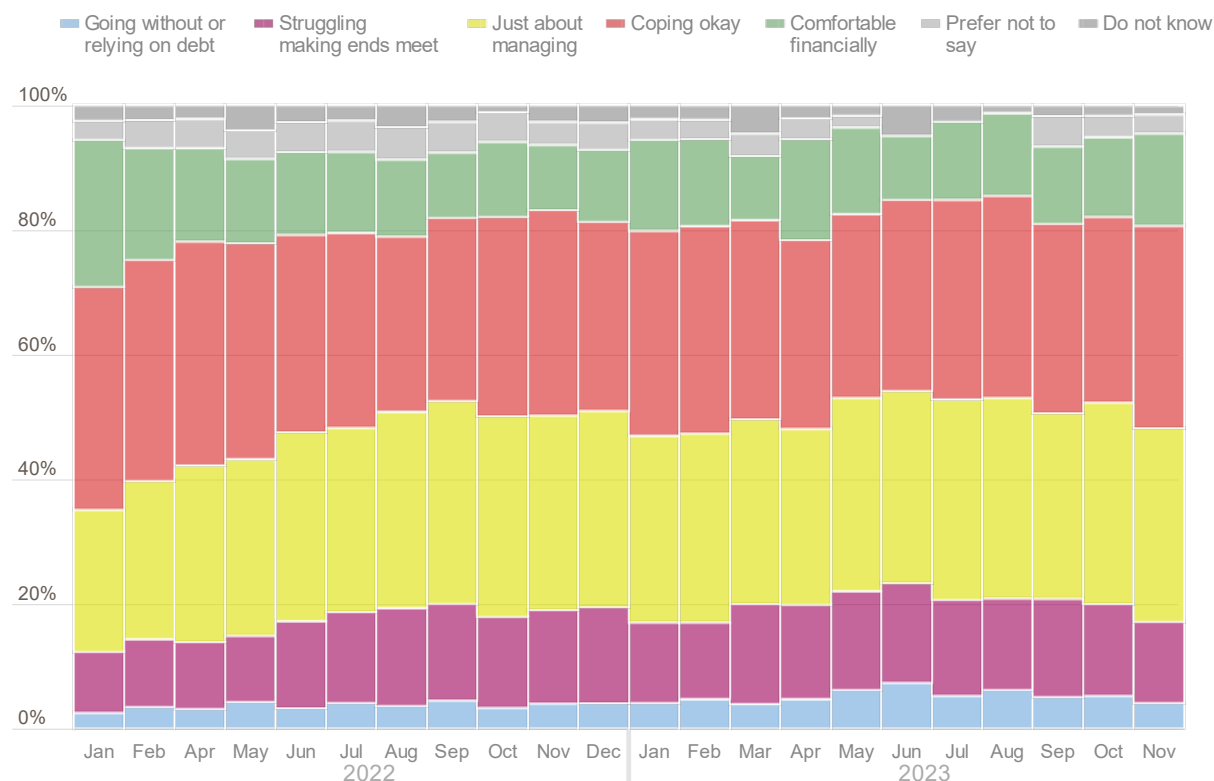
The proportions of working-age and pensionable-age Londoners in persistent poverty have been fairly stable, but remain above national levels.

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<sup>28</sup> Most recent year for which data is available.

### Figure 8: Struggling financially

Percentage of people in different financial situations, London quarterly data shown Jan 22-Nov 23



Source: [YouGov survey January 2022 – November 2023](#)

All figures, unless otherwise stated, are from YouGov Plc for the GLA. Monthly sample sizes were between 968 and 1,320 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 November 2023, 47% of Londoners said they were coping okay or comfortably. This is up from around 40% in September 2022, but remains below early-2022 levels.

Correspondingly, the proportions who said they were struggling financially (17%)<sup>29</sup> decreased since June 2023 (23%), while nearly a third of Londoners report they are just about managing.

Higher income groups, homeowners and older Londoners (aged 65+) were least likely to say they were struggling financially. Meanwhile, nearly a quarter of 35 to 49-year-old survey respondents were struggling, while those aged 18-24 were least likely to be financially comfortable. Around a quarter of renters (particularly social renters), people from lower social grades, Black or Mixed ethnicity Londoners and those with a limiting health condition or disability reported struggling financially.

Twenty-six per cent of people living in a household receiving Child Benefit reported struggling financially, with as many as one in seven going without basic needs or

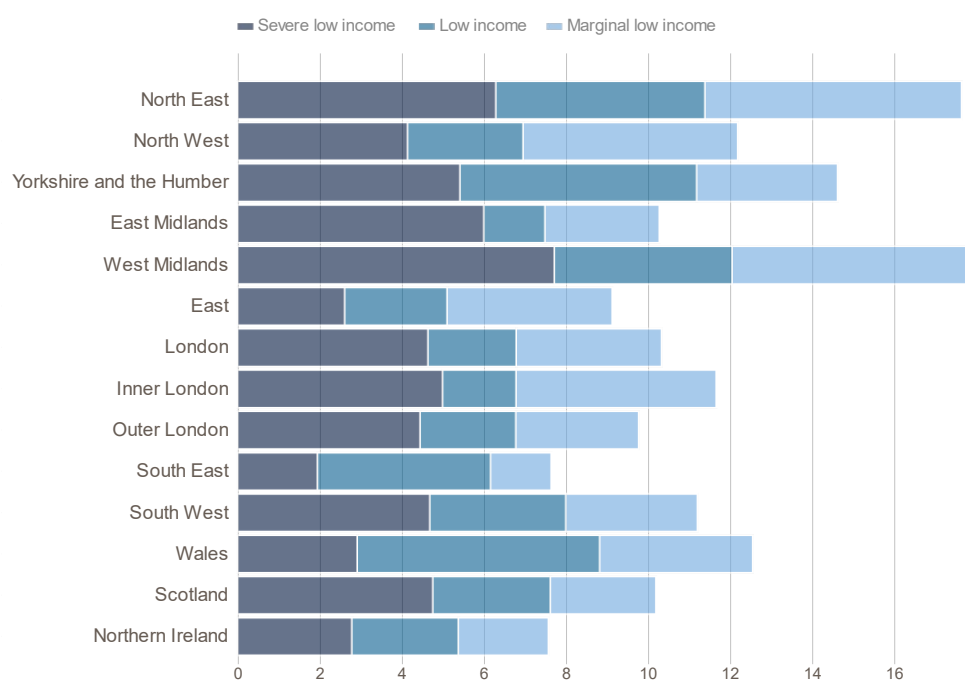
<sup>29</sup> Defined as going without or relying on debt to pay for their basic needs or struggling to make ends meet.

relying on debt, and around 30% of those living in a household claiming UC, HB or a disability-related benefit, (e.g., Personal Independence Payment or Attendance Allowance) were going without basic needs or struggling to make ends meet.

In October 2023, 20% of those paying rent or a mortgage said they had always fallen behind or struggled to make the payments, with another 21% struggling at least once. The picture for everyone paying other bills and credit commitments was fairly similar.

### 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<sup>30</sup>](#),

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

For children, such items include fresh fruit and vegetables, school trips, and not being able to heat the home. Not being able to afford about five from a list of 21 items is considered material deprivation.

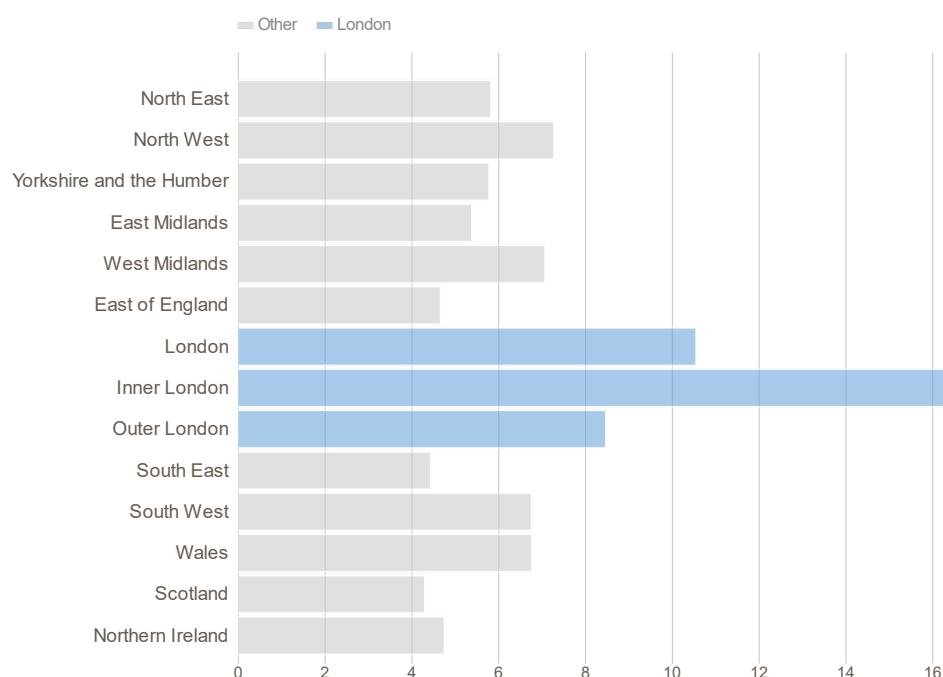
At one in nine, the proportion of London’s children in material deprivation and living in a household with low income (before housing costs) is lower than in previous years, and has particularly fallen for Inner London, from 17% to 12%.

<sup>30</sup> 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<sup>31</sup>)



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 and seeing friends or family once a month. Material deprivation for pensioners is when they are unable to afford, participate in or access more than about three of a list of 15 items.

Material deprivation is consistently more prevalent among London's pensioners than elsewhere in the UK. Incidence has always been higher in Inner than Outer London, but even Outer London rates exceed those in other UK regions.

## Destitution

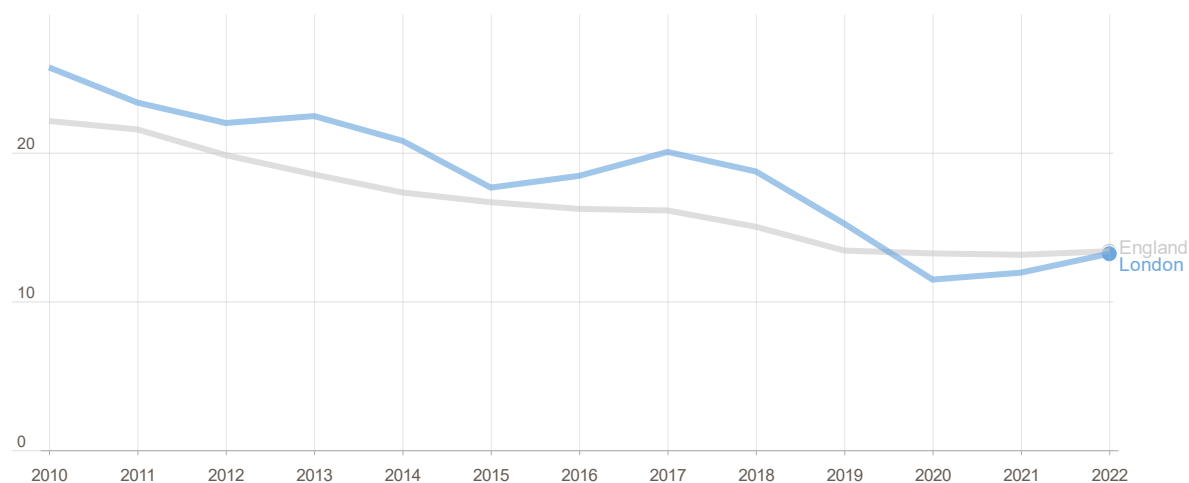
The Joseph Rowntree Foundation defines destitution as going without the essentials we need to eat, stay warm and dry (i.e., warm shelter), and keep clean. Shelter is discussed in the chapter on housing. This section looks at:

- fuel poverty, where the costs of keeping warm are balanced against income.
- food insecurity, whereby a person's food intake is sometimes reduced and their eating patterns are disrupted by affordability concerns.
- personal insolvencies (i.e., the extent to which individuals have unmanageable debt).

<sup>31</sup> Regional data for 2020/21 are not available, so the estimates including that year are averages of the two remaining time points

### 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.

The latest definition of fuel poverty<sup>32</sup> refers to low-income households that are in low energy-efficiency housing. By this measure, fuel poverty decreased nationally during the 2010s but has been stable since 2020. Having fallen below the national level in 2020<sup>33</sup>, fuel poverty began increasing in London to match national levels in 2022<sup>34</sup>.

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 in rented accommodation.

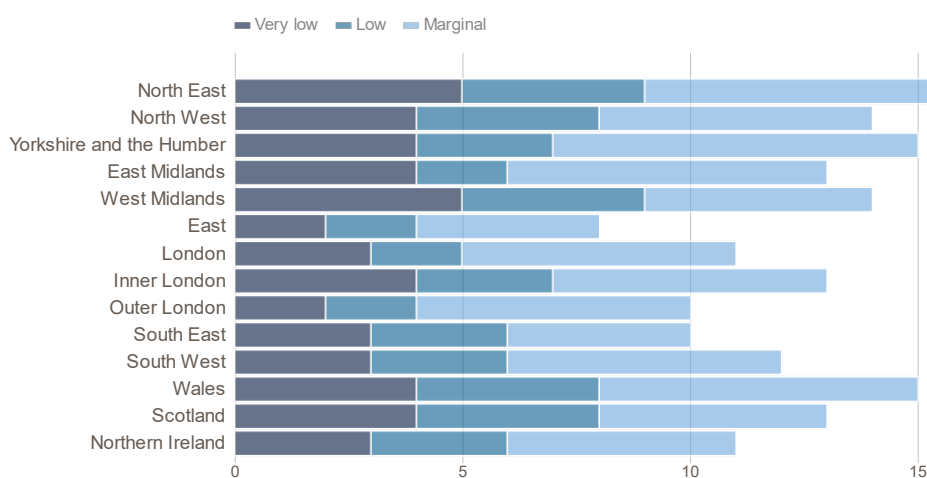
<sup>32</sup> Used by the Department for Business, Energy and Industrial Strategy (BEIS).

<sup>33</sup> 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.

<sup>34</sup> 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<sup>35</sup> in 2021/22, 5% were classed as food insecure. The North East and West Midlands had the highest levels of food insecurity (9%)<sup>36</sup>. Outer London matched the East of England in having the lowest level 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 previous year, down from one in five in 2018/19. The drop may be linked, at least in part, to the extraordinary measures, including furlough and the UC uplift, put in place during the COVID-19 pandemic. The groups most likely to be food insecure include single parents and social renters (both around 40%). One in eight food-insecure Londoners collected a food parcel from a food bank in the previous 12 months.<sup>37</sup>

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.<sup>38</sup>

<sup>35</sup> 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.

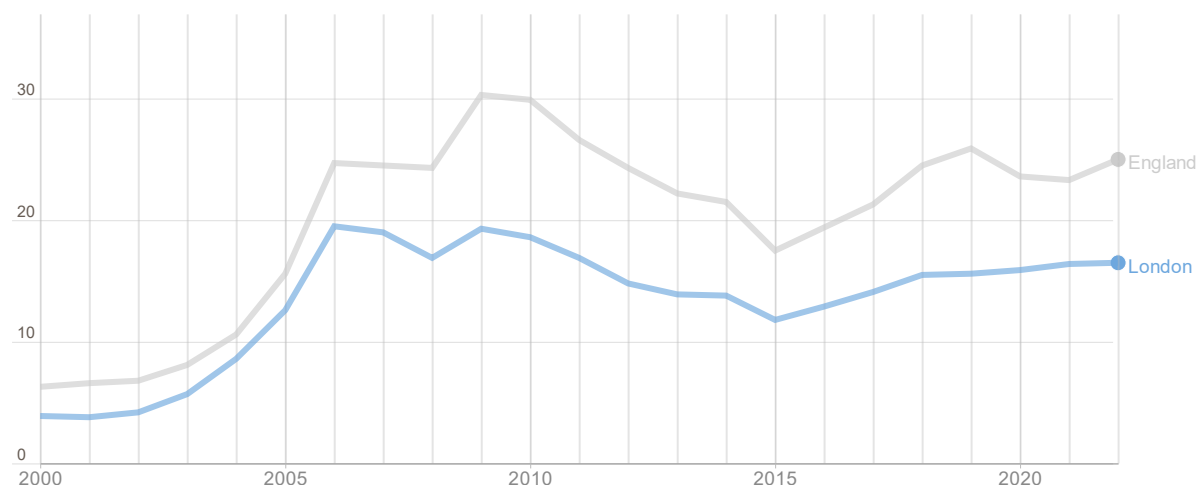
<sup>36</sup> Rounded figures are used, so figures shown in the chart may not sum to those quoted.

<sup>37</sup> <https://data.london.gov.uk/dataset/survey-of-londoners-2021-22>

<sup>38</sup> YouGov Plc. Total sample size for April was 1080 adults. Fieldwork was undertaken between 28<sup>th</sup> April – 3<sup>rd</sup> 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 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 - far lower than in any other region of England and Wales.

While London had lower rates than other regions across all insolvency categories, other sources (e.g., Family Resources Survey) have shown that London had higher percentages of households in arrears on bills.

## 7: HOUSING

There were around 3.79 million homes in London in 2023, a number that has increased by around 40,000 a year on average in the last five years. The 2021 London Plan sets a target for an average of 52,000 new homes to be built each year over the next decade.

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 March 2023 was £535,000, while the median private rent was £1,500 per month (a figure that does not yet fully reflect the significant increases in rents for new tenancies seen in the last year).

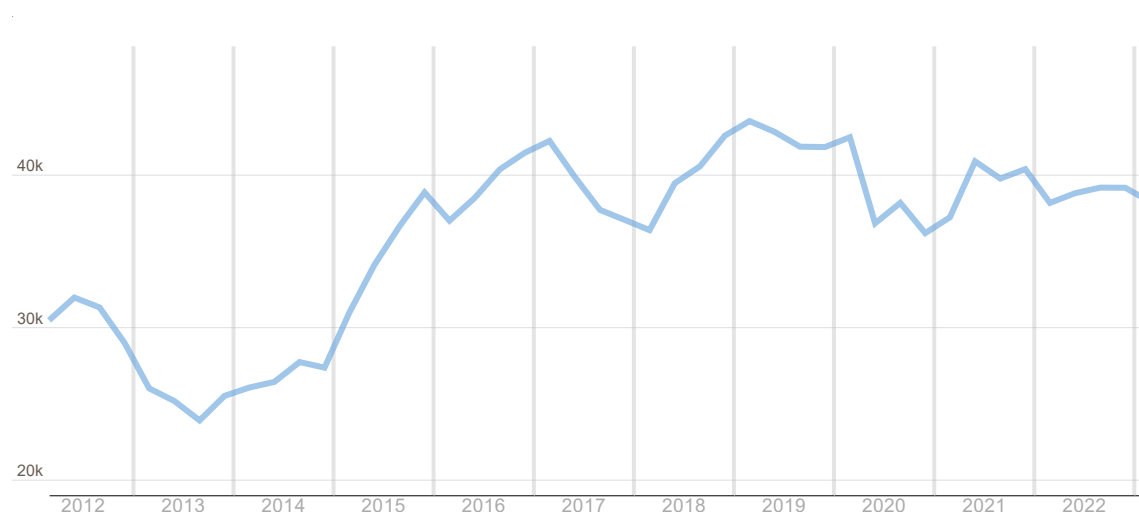
The high cost of housing and the scarcity of suitable accommodation means that London has particularly high rates of housing need. According to official statistics, around 1.7% of all households in London are homeless and living in temporary accommodation, compared to around 0.2% in the rest of England.

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](#)

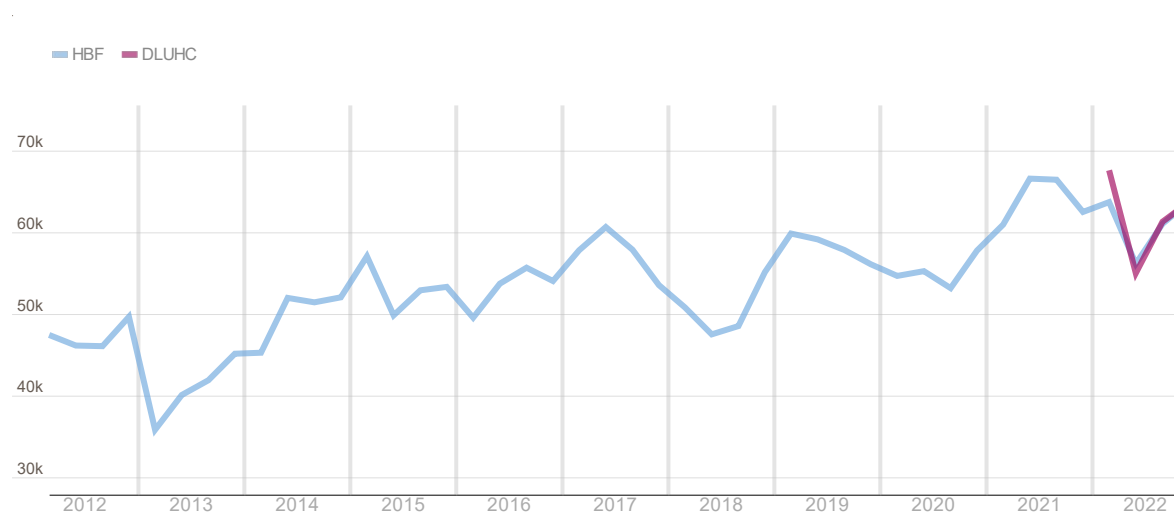
An early indication of the trend in new supply is given by quarterly Department for Levelling Up, Housing and Communities (DLUHC) figures on the number of Energy Performance Certificates (EPCs) issued for new homes in London. This figure has

largely tracked official annual statistics on net conventional completions over recent years.

There were 34,985 EPCs issued for new homes in London in the year to September 2023, down 11% from 39,150 the year before and the lowest annualised figure since 2015. However, it should be noted that this reflects broader market trends, and is not simply a result of London-level realities. The housebuilding industry has been hit hard in recent years by a combination of rising material prices, regulatory uncertainty, increased borrowing costs and lower demand from would-be home buyers.

**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 58,300 new homes approved in London in the year to June 2023, up 6% from the year before but below the previous peaks. The slowdown in the construction market seems likely to lead to a fall in these figures over the coming months.

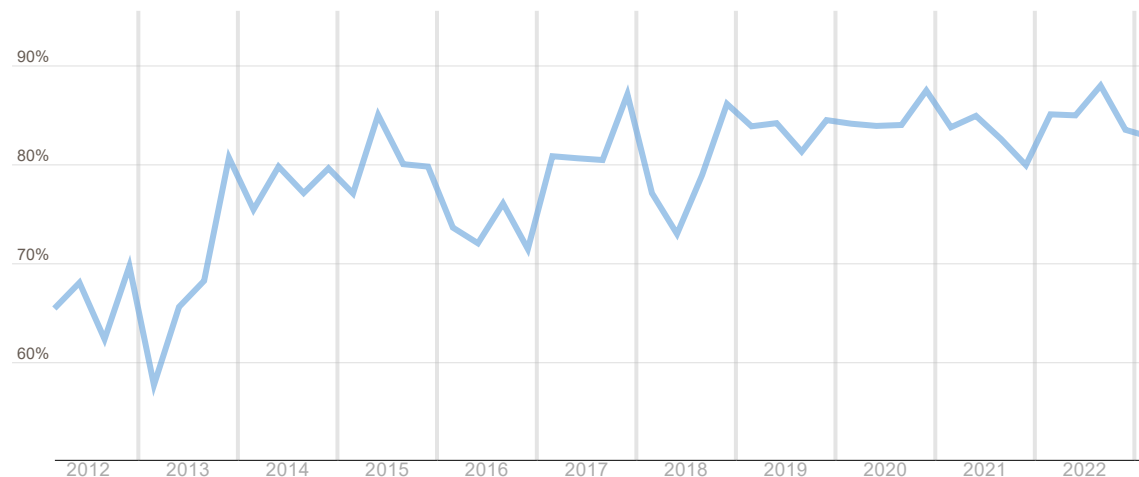
The Home Builders Federation provides a longer historic time series on a consistent basis in its Pipeline Report, and its figures (unlike DLUHC’s) are subject to revision over time as new data becomes available.

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



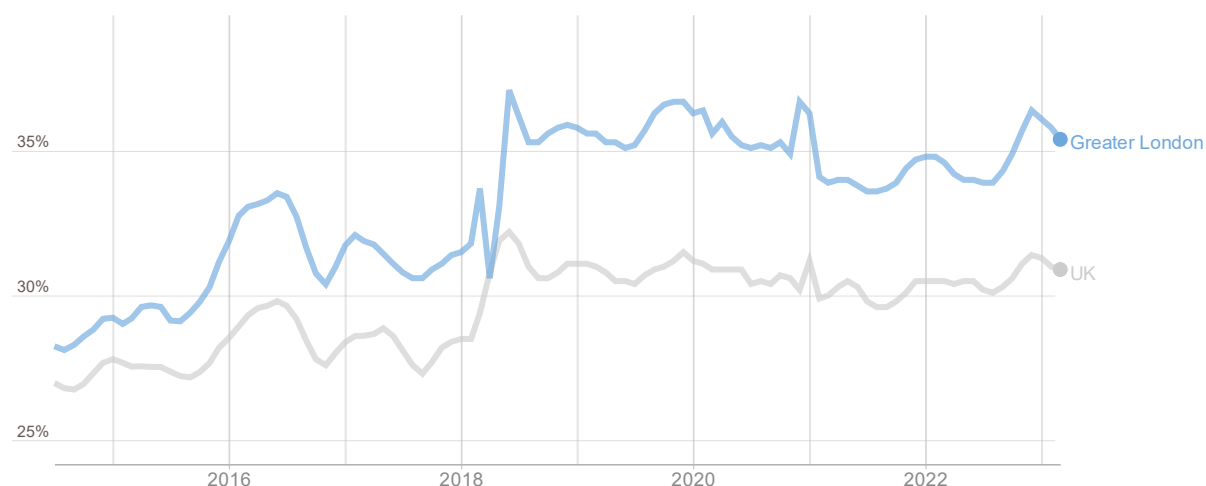
Source: [DLUHC EPC live table NB1](#)

According to data on Energy Performance Certificates, 82% of new homes completed in London in Q3 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, 84% of new homes completed had a rating of A or B in Q3 2023.

**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 38.8% of tenant incomes in October 2023, up sharply from 34.9% in October 2022 and the highest figure

Homelet have so far recorded. Across the UK as a whole, private rents on new tenancies accounted for 31.0% of tenant incomes in March, up from 29.4% a year before.

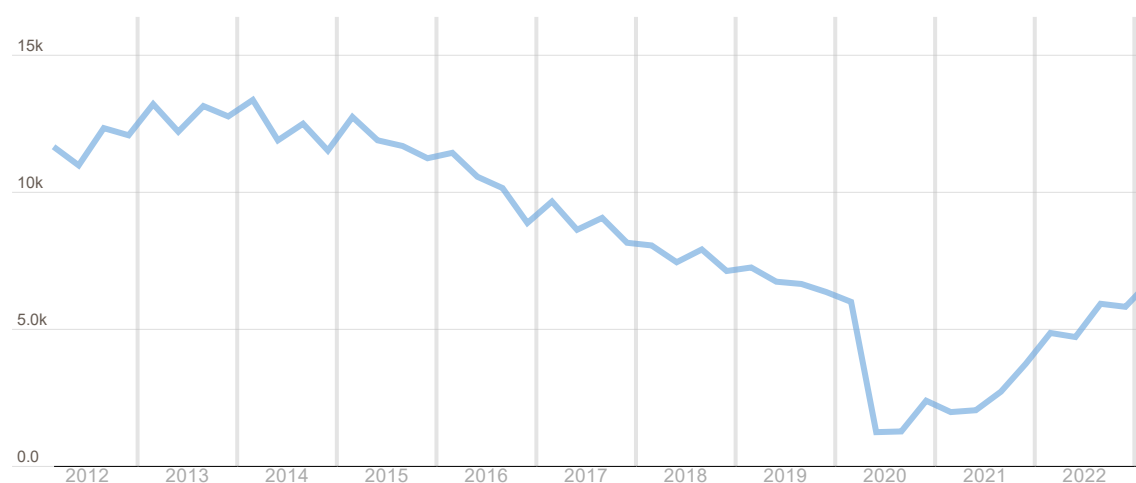
Growth in rents across all tenancies lags behind the growth on new tenancies, but is now rising steeply: the ONS report that average private rents across all tenancies in London increased by 6.8% in the year to October 2023, the fastest growth yet recorded for any region.

Such rapid rates of growth in rents will not be sustainable, with commentators such as Savills arguing that the market in London has reached an 'affordability ceiling' as renters cannot afford to pay any more relative to their incomes.

## 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.

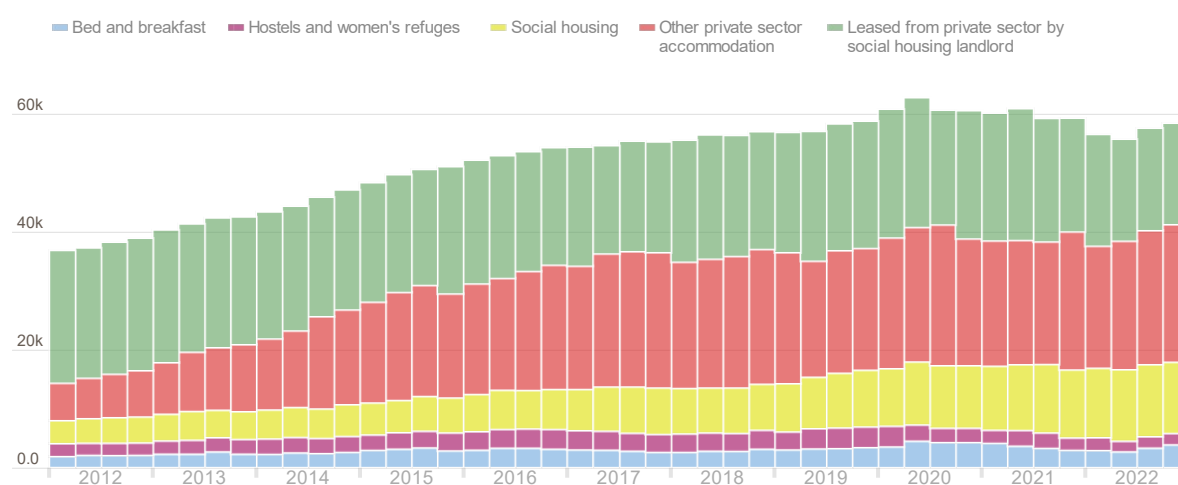
The number of claims by social and private landlords in London fell from 6,640 in Q3 2019 to 1,260 in Q3 2020, before increasing again over the following three years to reach 8,010 in Q3 2023, the highest figure since 2018. This increase in claims is consistent with rising rents and worsened affordability, as set out in the previous section.

It is also 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](#)

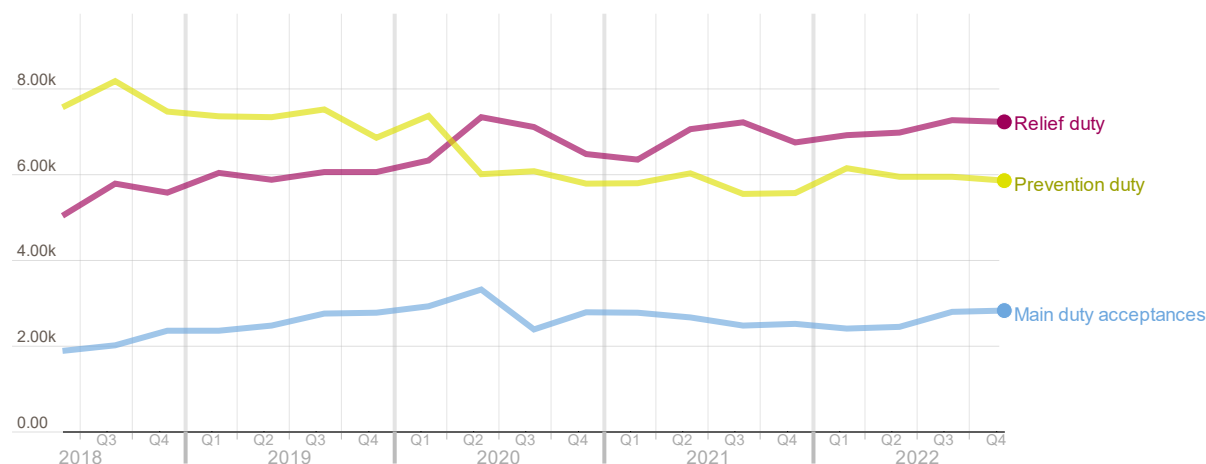
According to DLUHC statistics, there were 60,580 homeless households in temporary accommodation arranged by London boroughs at the end of June 2023, up from 56,340 a year before and the highest figure since a peak of 62,650 in mid-2020.

41,660 of the homeless London households in temporary accommodation in mid-2023 had children, with a total of 82,360 children between them.

The number of households in bed and breakfast (B&B) accommodation has risen sharply in the last year. In mid-2022, there were 2,910 households in B&Bs, but by mid-2023 this had risen to 4,620, including 1,650 households with children (of which 1,190 had been in the B&B for more than 6 weeks). 11,690 homeless households were being temporarily accommodated in social housing in mid-2023, a figure that rose sharply from 2018 to early 2023, but which fell in the last quarter.

### 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.

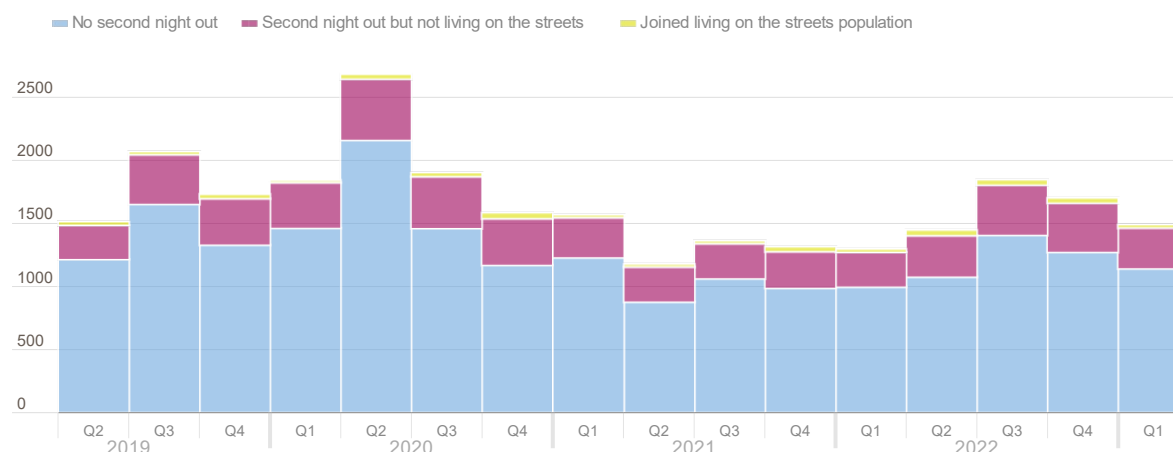
There were 14,320 households assessed as owed a new prevention or relief duty in London in Q2 2023, including 6,460 prevention and 7,860 relief duties. Each of these figures is up from a year ago, but the number of households owed a prevention duty each quarter is still below pre-pandemic levels.

There were 3,470 households accepted as owed a main homelessness duty by London boroughs in Q2 2023, the highest number since these figures were first compiled in 2018.

The extent of the shortage of social housing in London means that homeless households can spend a very long time in temporary accommodation. Official figures from the end of March 2023 show that 32% of families in temporary accommodation in London have been there for five or more years, compared to 4% in the rest of England.

**Figure 8: People seen sleeping rough in London for the first time**

Number of people



Source: [GLA CHAIN quarterly rough sleeping reports](#)

In the third quarter of 2023, outreach teams recorded 2,086 people who were seen sleeping rough in London for the first time, the highest figure since the mid-pandemic peak of 2,680.

1,613 of the new rough sleepers seen in Q3 2023 spent only one night sleeping rough, while 413 were recorded sleeping rough for more than one night but not considered to be living on the streets. 60 people were judged to have joined the population living on the streets as they had been seen a high number of times over a period of three weeks or more.

## 8: THE ENVIRONMENT

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.

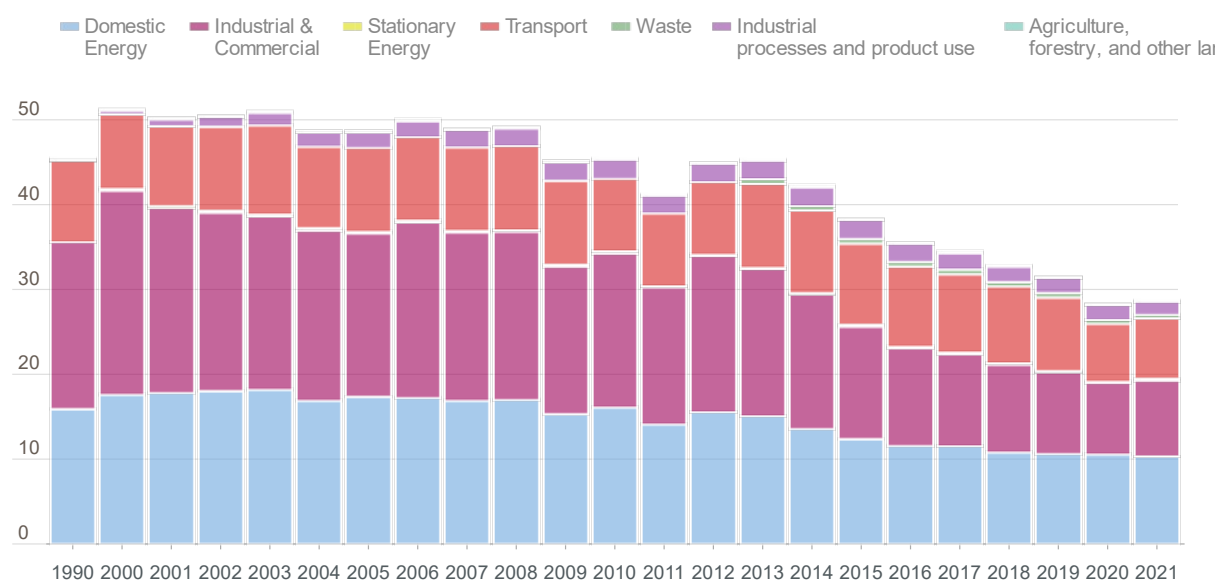
The [London Environment Strategy](#), published in May 2018, set out the Mayor's vision for tackling the climate and ecological emergencies whilst improving London’s air quality. These are also linked to social equality issues; for example, poor air quality disproportionately affects low-income and BAME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

### Greenhouse Gas Emissions

The [London Energy and Greenhouse Gas Inventory \(LEGGI\)](#) reports yearly GHG emissions in London by source.<sup>39,40</sup> The most recent available data for London are from latest inventory is for 2021, published in December 2023, so there is a two year lag in this indicator. London’s 2022 inventory will be published at the end of 2024.

**Figure 1: Greenhouse Gas emissions in London**

Million tonnes of greenhouse gases (MtCO<sub>2</sub>e)



Source: GLA, [LEGGI, 2021 \(published 2023\)](#). Data is published with a two year lag since it is contingent on Department of Net Zero energy consumption [datasets](#) that are also published with a two year lag.

<sup>39</sup> For ease of reporting, the different GHG emission levels are converted into the CO<sub>2</sub> emissions levels that have an equivalent potential of global warming. The measurement unit is hence named tonnes of CO<sub>2</sub> equivalent, or tCO<sub>2</sub>e – see HM Government, [Environmental Reporting Guidelines](#).

<sup>40</sup> For comparisons with trends outside London, see [Local authority and regional carbon dioxide emissions national statistics](#) – including CO<sub>2</sub> 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.

Figure 1 shows that in 2021 London's emissions were the equivalent of 28.7 million tonnes of GHG emissions (MtCO<sub>2e</sub>) across seven sectors: domestic buildings; industrial and commercial buildings; transport; waste; industrial processes and product use; agriculture; forestry and land use change. Emissions from domestic, industrial and commercial buildings were responsible for 68% of total emissions in London, followed by transport at 25%, with other sources responsible for the remaining 7%.

London's trend of reducing emissions can be seen in Figure 1, with a more significant decrease in 2020. The 2021 emissions represent a 37% reduction on 1990 levels and a 44% reduction compared to 2000, despite a significant increase in population over the same period of 29% and 22%, respectively. London's emissions dipped by 10 per cent during 2020 as a result of changes to working and travelling patterns. Between 2020 and 2021 they 'rebounded' by about 2 per cent. The national average in GHG emissions was a drop of 10 per cent followed by a 5 per cent rebound.

London's per capita emissions have reduced by 51 per cent, from 6.7 MtCO<sub>2e</sub> per capita in 1990 to 3.3 MtCO<sub>2e</sub> per capita in 2021. Compared to the rest of the UK, London has the lowest per capita emissions of any region due to the city's extensive public transport system, a high population density and having fewer industrial facilities than other regions.

LEGGI is our best source of data for the GHG emissions indicator (Figure 1). LEGGI uses government emissions factors and energy consumption data, Transport for London's detailed transport emissions data and national datasets on waste and industrial process emissions. It is compiled using recommended [calculation and reporting methodologies for cities](#), and provides both energy consumption and GHG emissions data. It is updated yearly and is available by sector and borough.

## Air Quality

Air quality is used to describe levels of pollution in the air that we breathe. There is strong evidence linking adverse health impacts to levels of nitrogen dioxide (NO<sub>2</sub>) and particulate matter (PM), so levels of these pollutants are of particular importance.

NO<sub>2</sub> is a gas that is mainly produced during the combustion of fossil fuels, along with nitric oxide (NO). Exposure to NO<sub>2</sub> can lead to adverse health impacts such as inflammation of the airways, increased susceptibility to respiratory infections and allergens, and can exacerbate the symptoms of those already suffering from lung or heart conditions. Particulate Matter (PM) refers to particles in the air that are not a gas, consisting of various chemical compounds and materials. In an urban environment, PM is produced by urban activity such as construction, vehicle exhaust emissions, and road dust resuspension. There are well-documented health impacts associated with exposure to PM. PM is usually categorised according to the maximum diameter of each particle (PM<sub>10</sub> or PM<sub>2.5</sub>, the latter being the smaller one).

This section summarises long-term trends in these key air pollutant concentrations monitored across London<sup>41</sup>. The data is presented as monthly average concentrations<sup>42</sup> until the end of October 2023, the latest full month of available data at the time of writing. The Ultra Low Emission Zone (ULEZ) was expanded London-wide at the end of August 2023. Air quality data collection is ongoing, and a preliminary assessment of measured pollutant concentrations will be included in the London-wide ULEZ Six Month Report. A fuller analysis of the impact of the scheme on pollutant emissions and concentrations will be included in the One Year Report once a longer-term comparative trend analysis is available.

Air quality concentration data presented in this report has been averaged by location as defined by the Inner London ULEZ classifications, i.e. prior to the London-wide ULEZ expansion, to remain consistent with previous State of London reporting. The locations are defined as: Central (within the congestion charge zone); Inner (defined as outside the Central zone and within the ULEZ prior to the latest expansion); and Outer (defined as outside the ULEZ prior to the latest expansion). The data has also been split by site type, defined as: roadside sites, those typically within one to five metres of the kerb of a busy road; and urban background sites, those broadly representative of city-wide background conditions<sup>43</sup>.

The Air Quality Standards Regulations (2010) sets out UK legislation for three key air pollutants:

- NO<sub>2</sub>: the regulations require that the long-term (annual) average concentration of NO<sub>2</sub> must not exceed 40 µg/m<sup>3</sup> and that there must not be more than 18 exceedances of the short-term (hourly) average limit value (concentrations above 200 µg/m<sup>3</sup>).
- PM<sub>10</sub>: the regulations require that the long-term (annual) average concentration of PM<sub>10</sub> must not exceed 40 µg/m<sup>3</sup> and that there must not be more than 35 exceedances of the short-term (24-hour) average limit value (concentrations above 50 µg/m<sup>3</sup>).
- PM<sub>2.5</sub>: the regulations require that the long-term (annual) average concentration of PM<sub>2.5</sub> must not exceed 20 µg/m<sup>3</sup> over a year.

Recent scientific evidence<sup>44</sup> on the health impacts associated with PM<sub>2.5</sub>, has led to the setting of a more stringent UK limit under the Environment Act (2021) of 10 µg/m<sup>3</sup> (to be met by 2040)<sup>45</sup>.

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<sup>41</sup> Data has been collated from publicly available air quality data available at: [London Air Quality Network](#); [Air quality in England \(airqualityengland.co.uk\)](#); and [Home - Defra, UK](#)

<sup>42</sup> Provisional data has been included in order to provide the most recent data and a current snapshot of air quality conditions. The process of ratifying the data, i.e. undergoing the process of detailed quality assurance and control, can take between six months to a year and varies across monitoring stations in London. Monitoring sites with a minimum of 75% data capture for a month have been included in the data analysis and figures presented herein.

<sup>43</sup> London Local Air Quality Management Technical Guidance 2019 (LLAQM.TG (19)) (2019), Available at: [Working with the London boroughs | London City Hall](#)

<sup>44</sup> GOV UK (2022) Fine particulate air pollution (PM<sub>2.5</sub>): setting targets, Available at: [Fine particulate air pollution \(PM2.5\): setting targets - GOV.UK \(www.gov.uk\)](#)

<sup>45</sup> GOV UK (2023) Environmental Targets (Fine Particulate Matter) (England) Regulations 2023

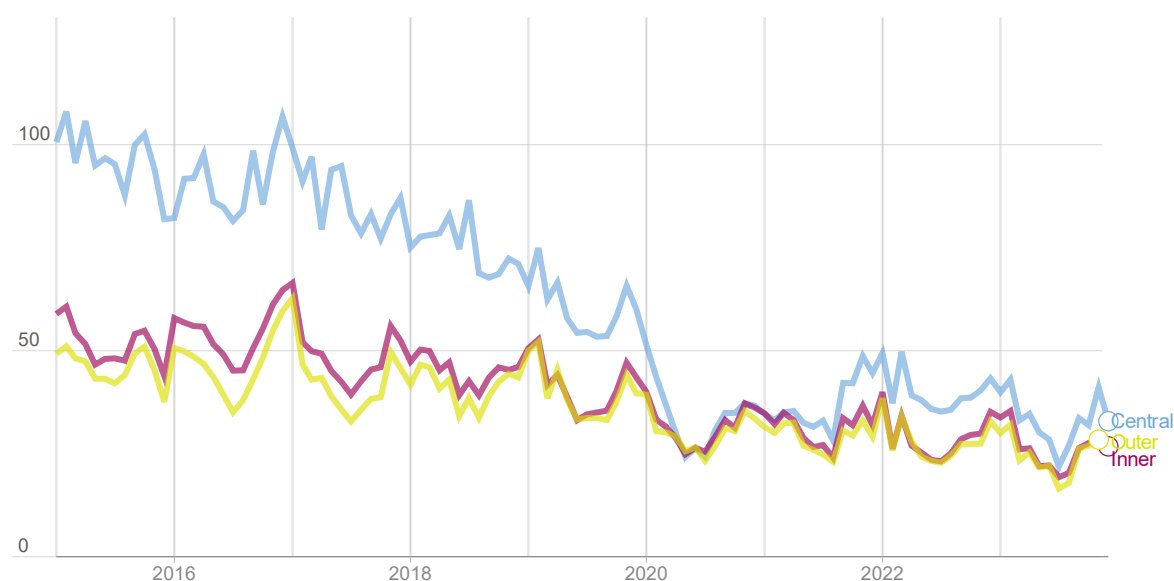
In 2021, the World Health Organisation (WHO) updated its recommended guidelines for air pollutants to reflect the best available evidence<sup>46</sup>:

- For NO<sub>2</sub> the WHO tightened the recommended annual average guideline to 10 µg/m<sup>3</sup> (the previous WHO guideline was 40 µg/m<sup>3</sup>, which is the current UK legal annual average limit), whilst introducing additional interim targets of 30 µg/m<sup>3</sup> and 20 µg/m<sup>3</sup>, representing incremental steps to progressively reduce NO<sub>2</sub> levels and achieve the newly proposed air quality guideline level.
- For PM<sub>10</sub>, the WHO tightened the recommended annual average concentration guideline to 15 µg/m<sup>3</sup>, while retaining 20 µg/m<sup>3</sup> as an interim guideline.
- For PM<sub>2.5</sub>, the WHO tightened the recommended annual average concentration guideline to 5 µg/m<sup>3</sup>, while retaining 10 µg/m<sup>3</sup> as an interim guideline, which the Mayor has committed to meet by 2030 (the previous UK legal annual average limit was 20 µg/m<sup>3</sup>).

## Nitrogen Dioxide (NO<sub>2</sub>)

**Figure 2: NO<sub>2</sub> monthly average concentrations at roadside monitoring locations**

Micrograms per cubic meter (µg/m<sup>3</sup>)



Source: [London Air](#) and [Air Quality England](#). The data can be viewed on the [State of London Dashboard](#).

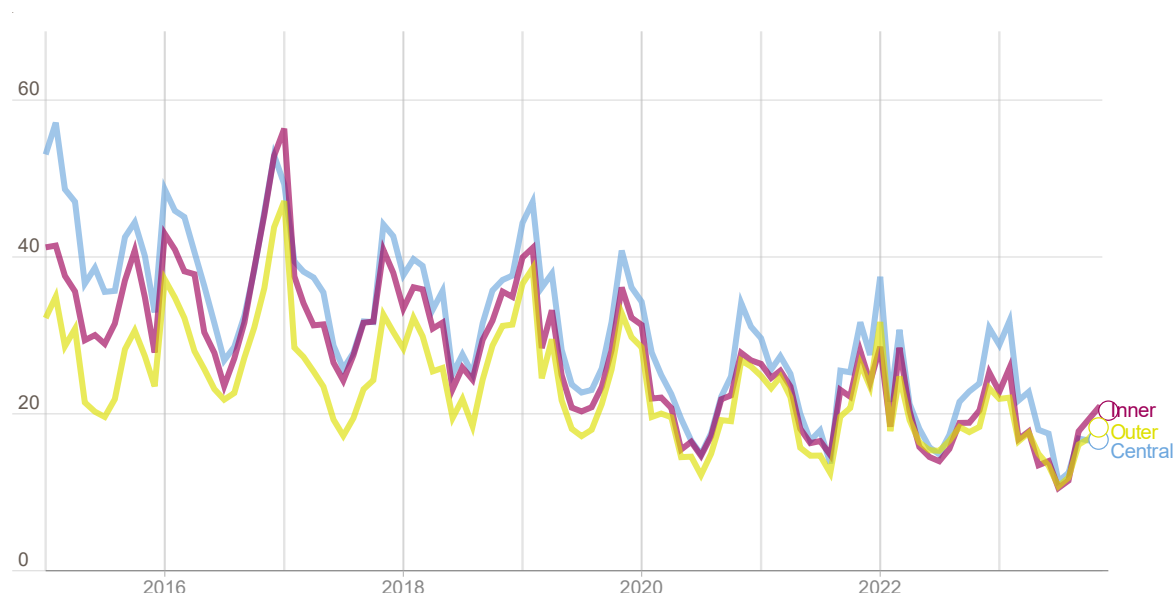
Figure 2 shows that monthly NO<sub>2</sub> concentrations across Central, Inner, and Outer roadside monitoring stations have followed a general downward trend since 2017, with further notable reductions observed in 2020 and 2021 during the COVID-19

<sup>46</sup> 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.

pandemic. During the pandemic and until mid-2021, NO<sub>2</sub> concentrations were at similar levels across the whole of London. Since then, they have increased in Central London compared to Inner and Outer London, though they remain much lower than pre-pandemic levels.

**Figure 3: NO<sub>2</sub> monthly average concentrations at urban background monitoring locations**

Micrograms per cubic meter (µg/m<sup>3</sup>)



Source: [London Air](#) and [Air Quality England](#). The data can be viewed on the [State of London Dashboard](#).

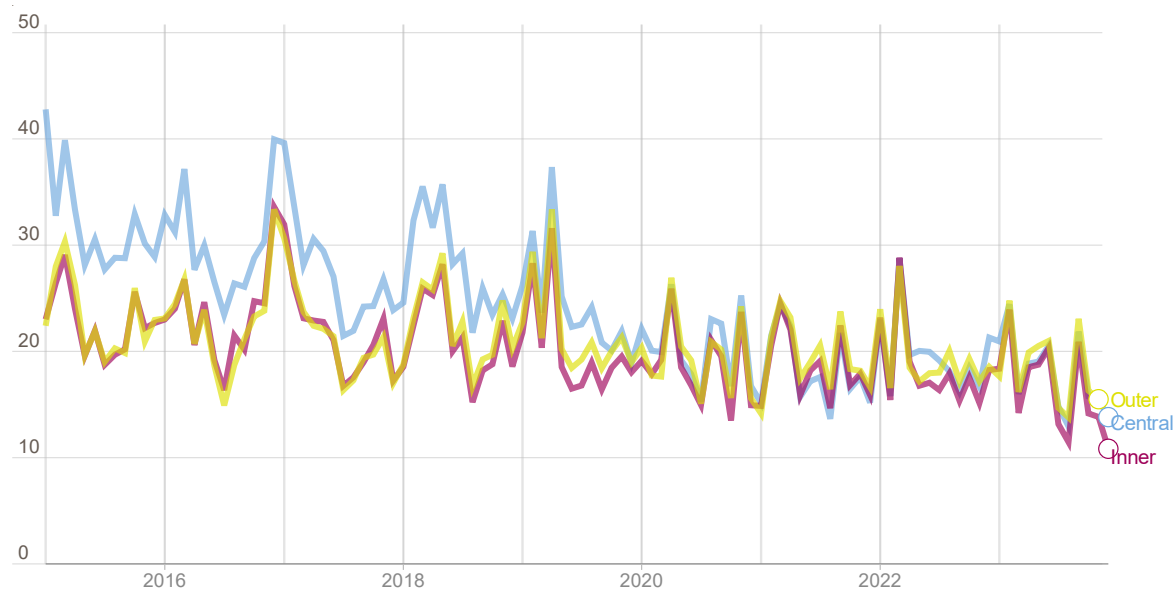
Urban background NO<sub>2</sub> concentrations are generally lower than roadside concentrations due to the distance from the main pollutant source (i.e. vehicular traffic on roads). Figure 3 shows the typical seasonal variation seen in monthly NO<sub>2</sub> concentrations, with high concentrations recorded in the winter relative to the summer months. However, despite the significant progress made and the general downward trend since 2017, accelerated additional action is needed to meet the WHO (2021) guidelines and to protect human health.



## Particulate Matter (PM)

**Figure 4: PM<sub>10</sub> monthly average concentrations at roadside monitoring locations**

Micrograms per cubic meter ( $\mu\text{g}/\text{m}^3$ )



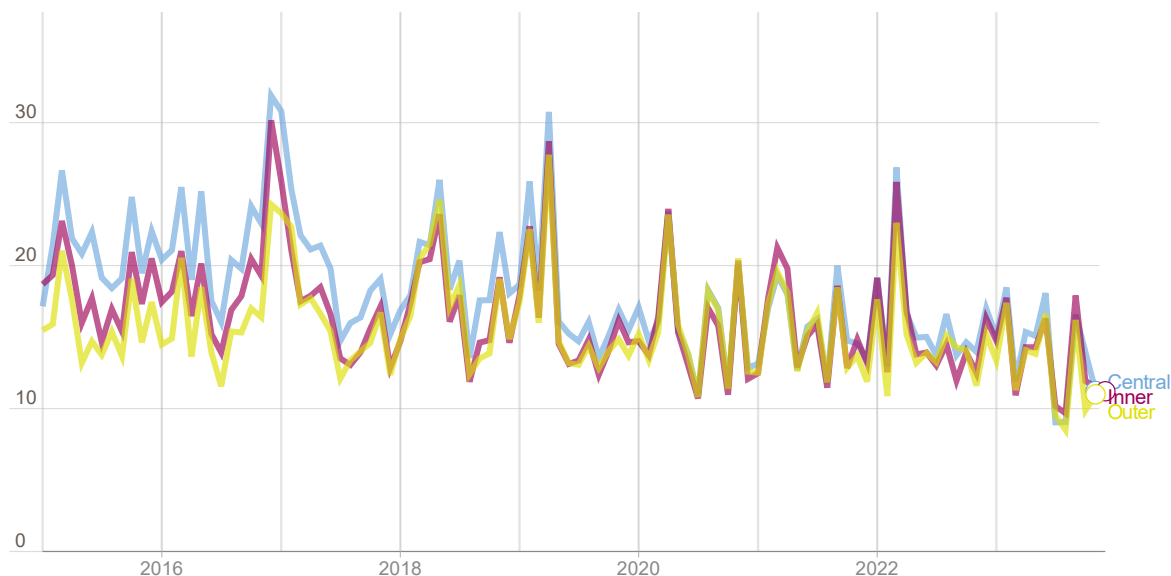
Source: [London Air](#) and [Air Quality England](#). The data can be viewed on the [State of London Dashboard](#).

Figure 4 shows the monitored concentrations of PM<sub>10</sub> at roadside monitoring locations for Central, Inner, and Outer areas in London averaged per month.

Across all of London, PM<sub>10</sub> concentrations have generally remained below the annual average legal limit of 40  $\mu\text{g}/\text{m}^3$ . PM<sub>10</sub> concentrations have also followed a persistent downward trend, although the monthly average concentrations exceed the WHO (2021) recommended annual average guideline of 15  $\mu\text{g}/\text{m}^3$ . Since 2020, the average monthly concentrations for each zone have converged and remained at similar concentrations.

### Figure 5: PM<sub>10</sub> monthly average concentrations at urban background monitoring locations

Micrograms per cubic meter ( $\mu\text{g}/\text{m}^3$ )



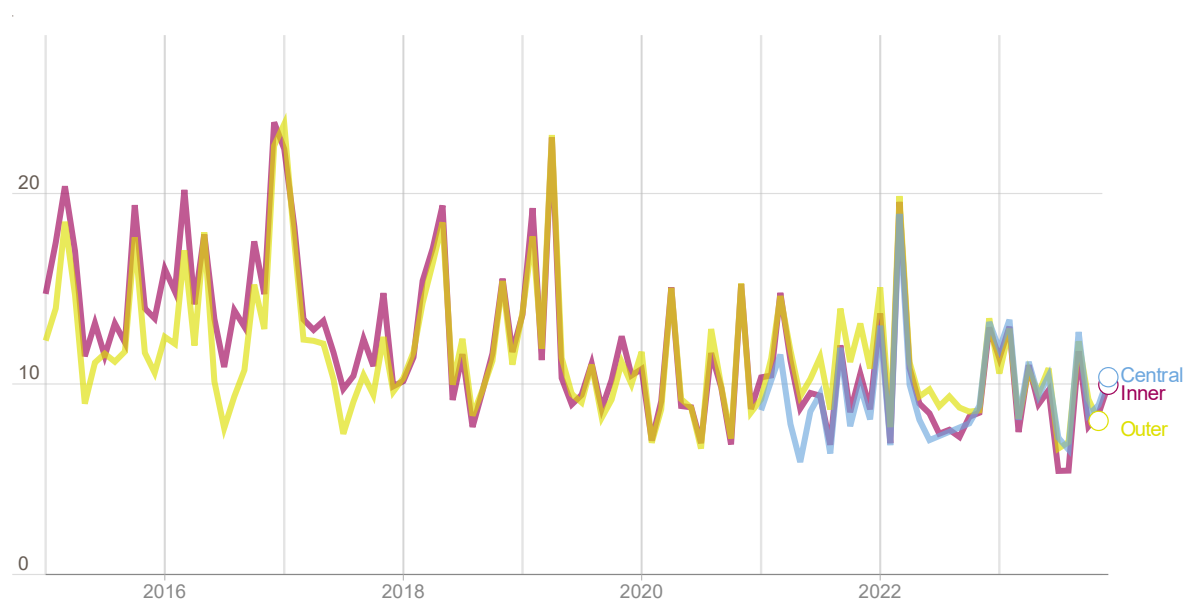
Source: [London Air](#) and [Air Quality England](#). The data can be viewed on the [State of London Dashboard](#).

Figure 5 shows a general decreasing trend in PM<sub>10</sub> concentrations at urban background monitoring locations over time, although not as pronounced as for NO<sub>2</sub>. PM<sub>10</sub> monthly average concentrations have been similar across all three areas of London since 2018, and from mid-2022 concentrations in Outer London have generally slightly exceeded those in Central London.

Consistent with measurements for NO<sub>2</sub>, PM<sub>10</sub> concentrations in the urban background are generally lower than roadside.

### Figure 6: PM<sub>2.5</sub> monthly average concentrations at roadside monitoring locations

Micrograms per cubic meter ( $\mu\text{g}/\text{m}^3$ )



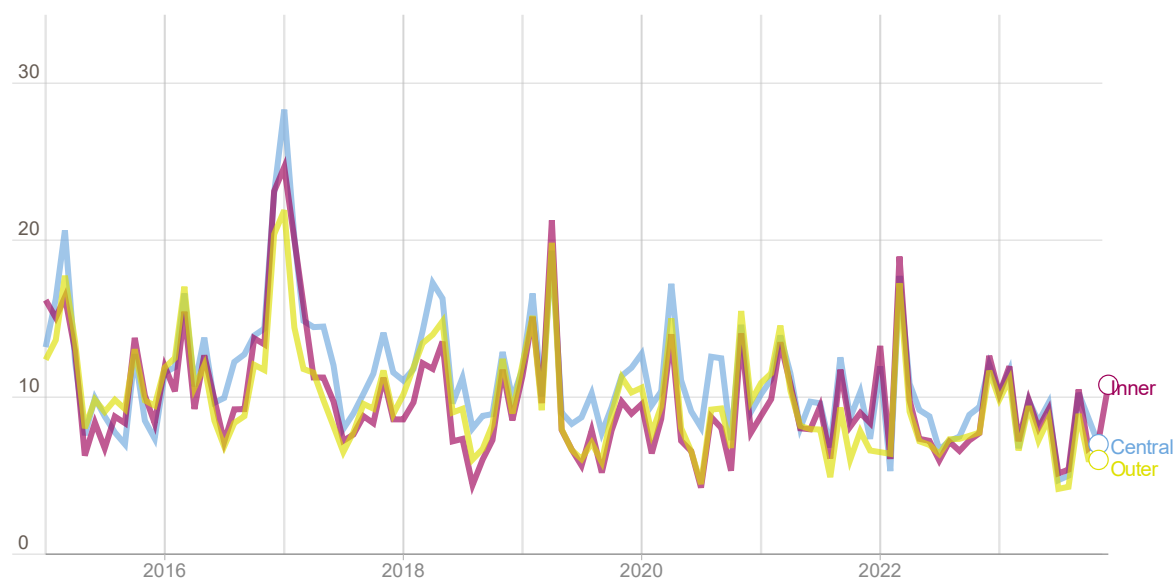
Source: [London Air](#) and [Air Quality England](#). The data can be viewed on the [State of London Dashboard](#).

Figure 6 shows the monitored concentrations of PM<sub>2.5</sub> at roadside monitoring locations for Central, Inner, and Outer areas in London averaged per month. It is worth noting that the number of stations monitoring different pollutants varies across London, which explains the historic absence of roadside sites monitoring PM<sub>2.5</sub> in Central London.

PM<sub>2.5</sub> monthly average concentrations have remained below the UK legal limit of 20  $\mu\text{g}/\text{m}^3$  for approximately four years, albeit above the WHO (2021) guideline level of 5  $\mu\text{g}/\text{m}^3$ . Figure 6 shows a general downward trend across all locations, albeit less defined than for other pollutants.

### Figure 7: PM<sub>2.5</sub> concentrations at urban background monitoring locations

Micrograms per cubic meter (µg/m<sup>3</sup>)



Source: [London Air](#) and [Air Quality England](#). The data can be viewed on the [State of London Dashboard](#).

Figure 7 shows the monitored concentrations of PM<sub>2.5</sub> at urban background monitoring locations for Central, Inner, and Outer London averaged per month.

As with measurements for NO<sub>2</sub> and PM<sub>10</sub>, concentrations of PM<sub>2.5</sub> in the urban background are generally lower than roadside, albeit marginally in this case. PM<sub>2.5</sub> concentration levels in the urban background have followed similar trends to roadside locations.

### Further Information

A London-wide map showing the hourly concentration of air pollutants is provided by the [London Air Quality Network](#).

[Breathe London](#) provides a map with charts showing the concentration of air pollutants at several measurement sites across London updated every hour. This website also presents data for non-reference grade monitors, classed as “indicative”, therefore providing supplementary monitoring to allow for a greater coverage across London.

In April 2023, the GLA published an update to the [London Atmospheric Emissions Inventory](#) (LAEI)<sup>47</sup> providing projections for the years 2025 and 2030. Data showed that despite progress towards the WHO interim targets, all of London was predicted to exceed the WHO (2021) annual average guidelines for NO<sub>2</sub> and PM<sub>2.5</sub> in 2019,

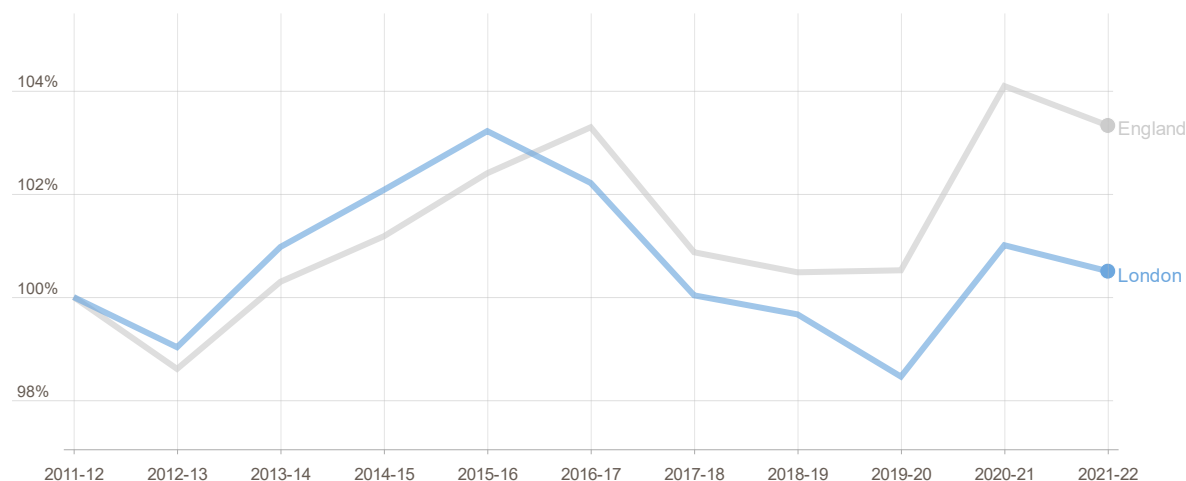
<sup>47</sup> London Atmospheric Emissions Inventory (LAEI) (2019), Available at: [London Atmospheric Emissions Inventory \(LAEI\) 2019 - London Datastore](#)

and forecasts show that all of London will continue to exceed them in both 2025 and 2030 without further action.

## 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.

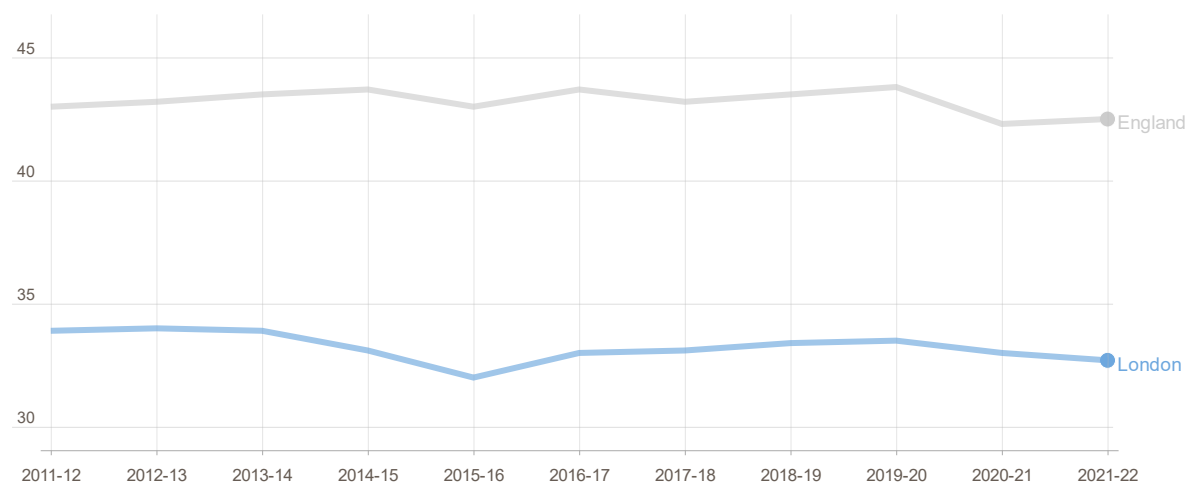
Data on local authority waste is reported annually and will next be published in March 2024 (with observations from 2022/23). The chart above shows how the volume of household waste collected by Local Authorities (showing combined waste and recycling volumes) has changed in London and England up to 2021/22, compared to 2011/12 volumes.<sup>48</sup>

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

<sup>48</sup> 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%<sup>49</sup>. 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, while less garden waste is produced. London also has a highly transient and diverse population with over 100 languages spoken, which can make communicating borough recycling services more difficult.

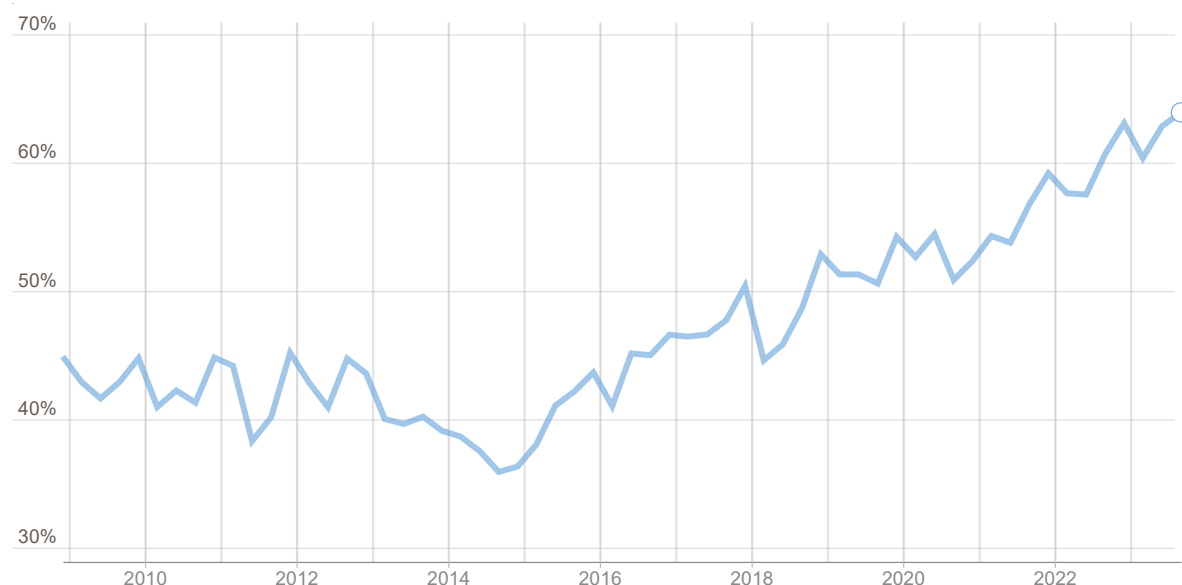
The recycling rate has remained relatively consistent in recent years, both in London and nationally. The most recent Defra data show London experienced a 0.3% decrease in recycling against a rise of 0.2% in the national figure in 2021/22.

<sup>49</sup> <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, rated 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.

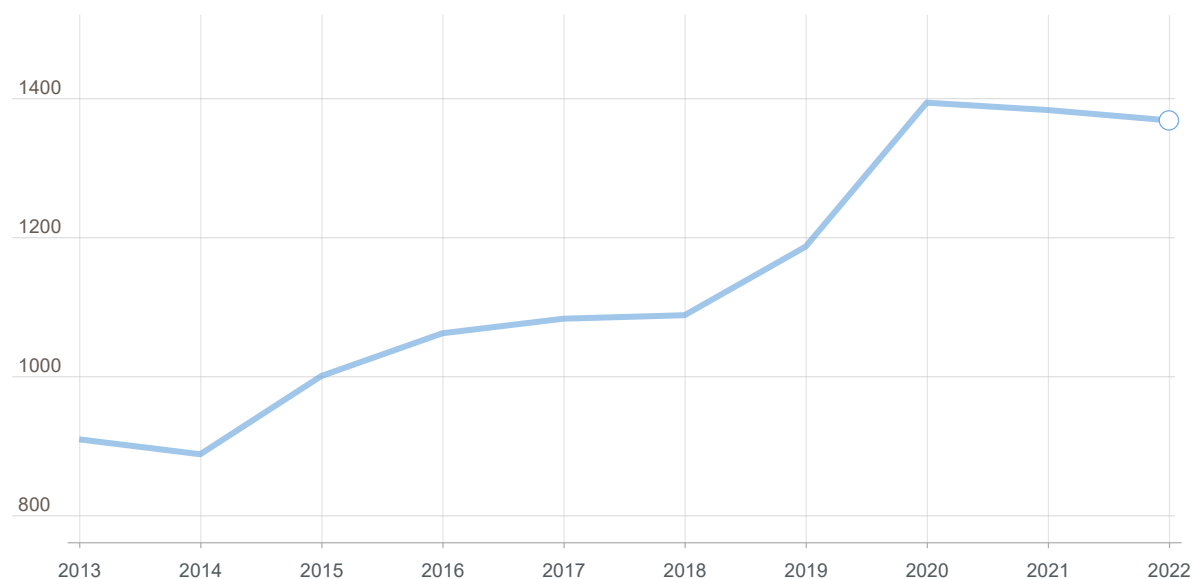
Figure 10 shows the share of those certificates added to the register per quarter with an efficiency rating of A-C (not cumulative totals). Data are based on experimental statistics.

Since the last quarter of 2014, the energy performance of dwellings added to the register increased steadily, with a marked increase in 2021 and 2022, and again from the second quarter of 2023. The Mayor’s London Plan requirements for new developments, the government’s Minimum Energy Efficiency Standards (MEES) requirement for rental properties and rising energy costs are likely contributors.

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

### Figure 11: Renewable electricity generation in London

Gigawatt-hours (GWh)



Source: Department for energy security and net-zero, [Regional Renewable Statistics, Regional Statistics 2003-2022: Generation](#). Data is also available at the level of Local Authorities.

Figure 11 shows the levels of electricity generated in London via renewable sources (e.g. wind, solar photovoltaic, landfill and sewage gas or other biomasses and waste). Since 2014, renewable electricity generation in London increased by over 50%. It peaked in 2020 at 1,393 GWh, decreasing very slightly in 2021 and in 2022 to 1,368 GWh<sup>50</sup>, due to a decrease in sewage gas.

Total energy consumption in London in 2021 (the latest data available from LEGGI) was over 123,200 GWh – meaning renewable energy production accounted for over 1.1% of total production.

### Green Infrastructure

The GLA prepared a number of interactive [Green infrastructure maps and tools](#) to help better understand London’s green infrastructure. This includes green cover and tree canopy cover maps based on modelling of high-resolution aerial imagery, and lidar data to identify how much of London is covered by trees, plants and open water. The maps currently display 2016 data and will be updated in early 2024. Comparisons over time will be shown in the next State of London Report.

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<sup>50</sup> Revisions have been made to data for 2020 and 2021 by the Department for Energy Security and Net Zero since the last publication of the State of London. This is due updates from data suppliers or more up to date information becoming available.



## 9: COMMUNITIES

This chapter sets out trends across 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.

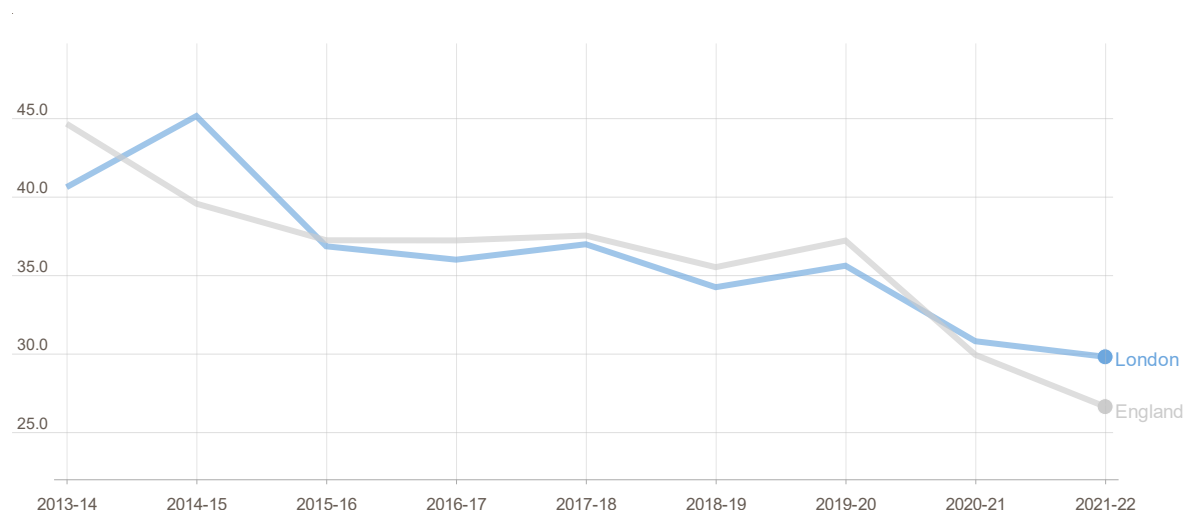
Much of the data is drawn from the Department for Culture, Media and Sport’s (DCMS) [Community Life Survey](#). This is a key source for understanding more about community engagement, volunteering and social cohesion throughout England. In previous years, the GLA published [summaries](#) of this survey, 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.

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 across a range of measures (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](#)

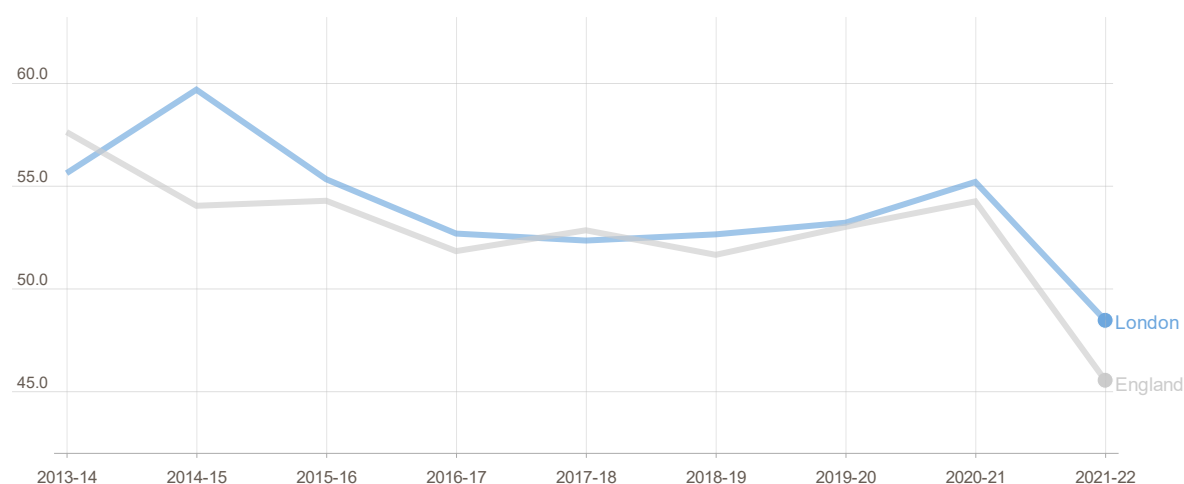
Three in ten (30%) Londoners aged 16+ formally volunteered in 2021-22. Formal volunteering refers to giving unpaid help through clubs or organisations.

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 (last year for which data is available) were 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](#)

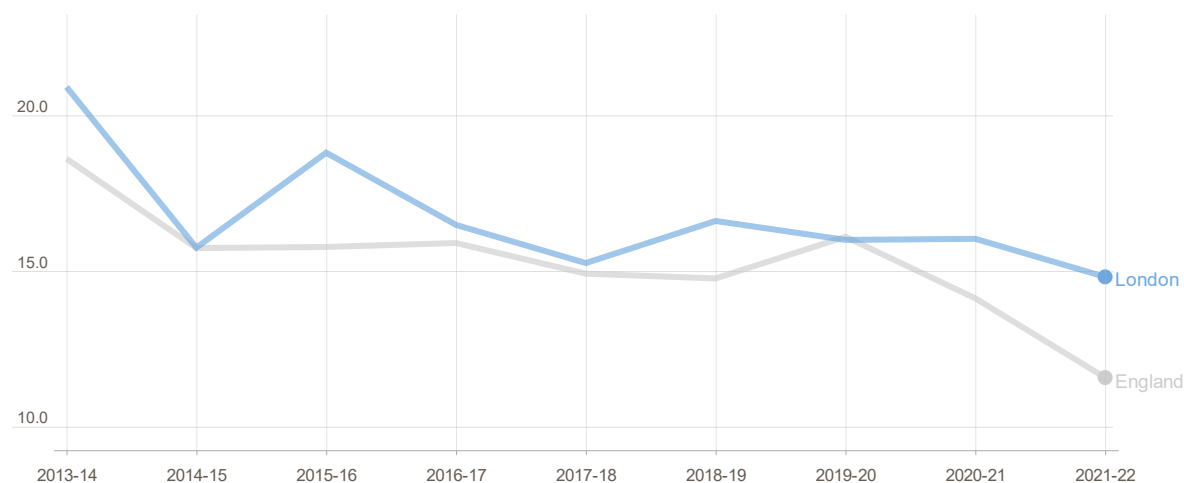
Around half (48%) of Londoners informally volunteered in 2021-22. Informal volunteering refers to giving unpaid help to individuals who are not a relative.

Since 2013-14, the percentage of people in London reporting that they had informally volunteered in the last year has not changed much annually. 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 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.

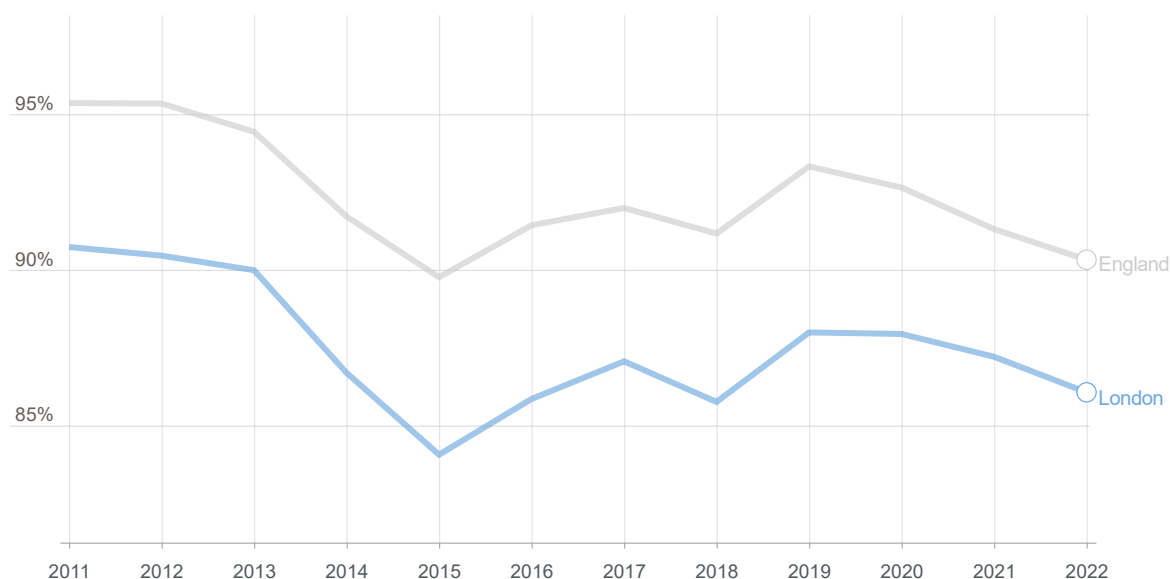
Since 2013-14, the percentage of people reporting that they were involved in social action decreased in London by six percentage points, a pattern mirrored across England.

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 (%)



Source: [Electoral Statistics for UK](#); [Mid-Year Population Estimates](#) (via Nomis)

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.

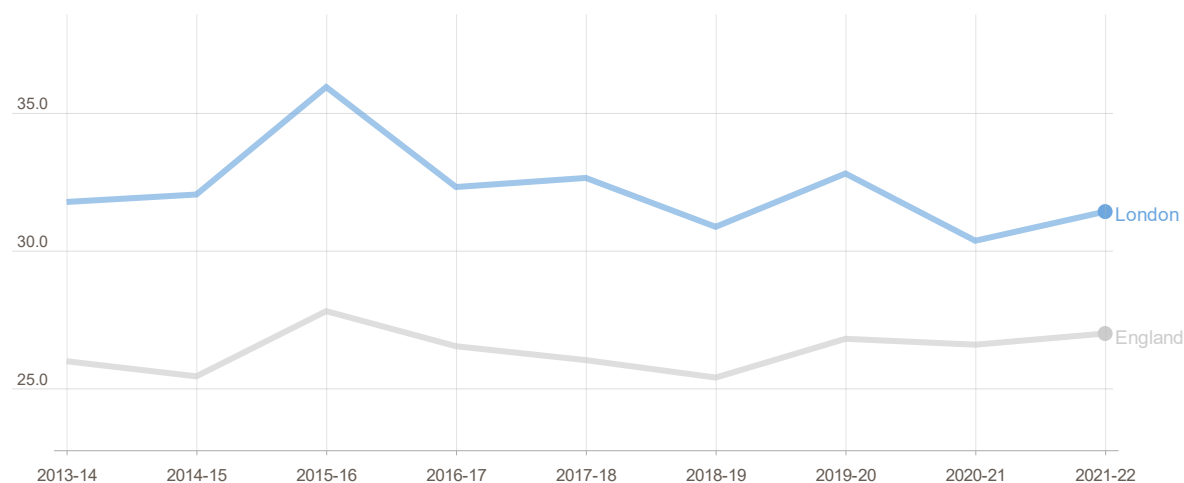
The voter registration rate in London has remained high since 2011. Back then, 91% of eligible adults were registered for local elections. However, by 2022, this was 86%. In other words, around one in seven Londoners (14%) were not registered to vote in 2022. The rate has been consistently lower in London than in England over the last decade, 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. This is slightly inaccurate as not all adults are eligible to vote<sup>51</sup>. This means the local election registration rate is slightly higher than presented here.

<sup>51</sup> <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.

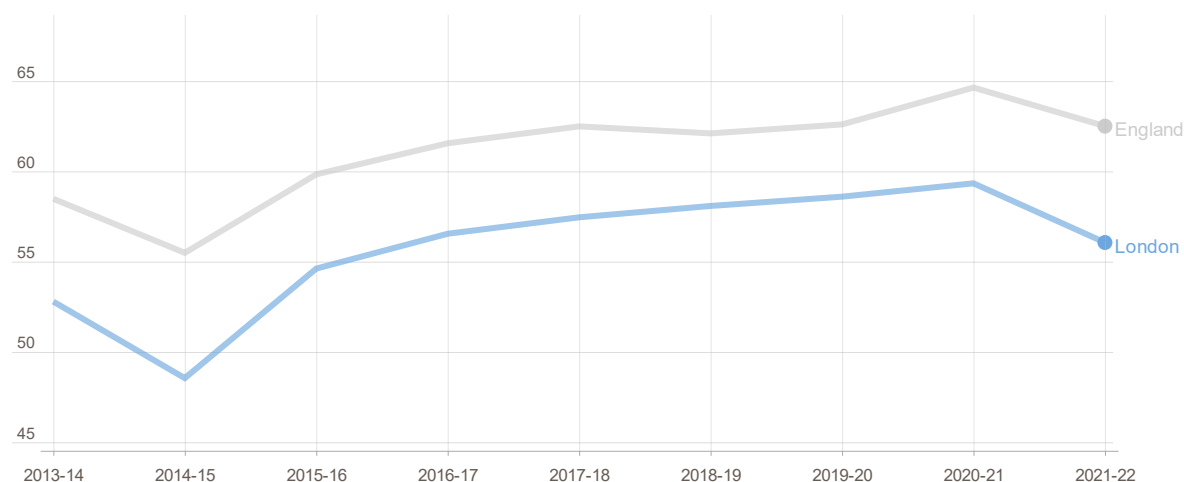
Since 2013-14, the percentage of people in London reporting that they could personally influence decisions in their local area has not changed much year to year, a pattern mirrored across England.

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 (%)



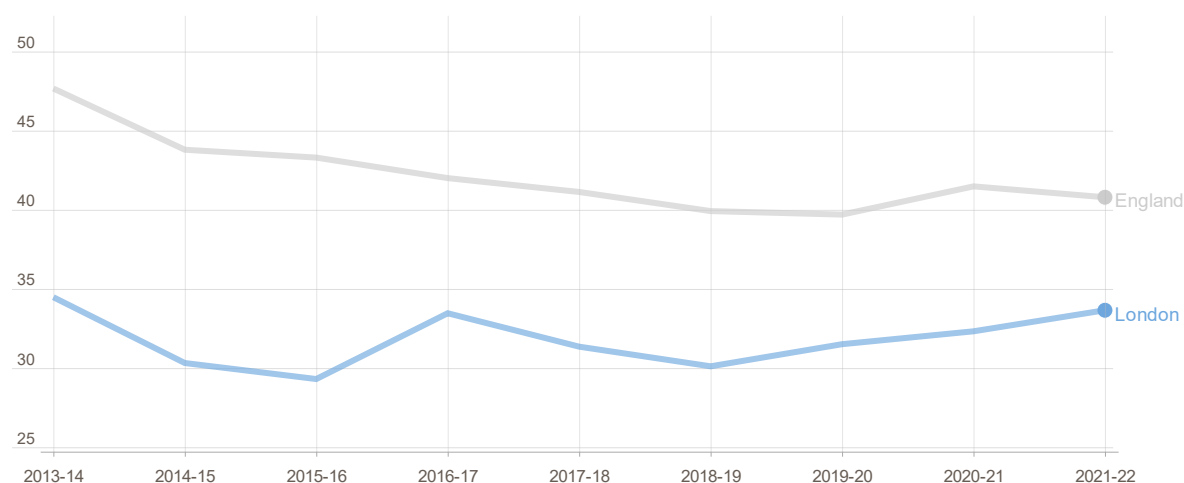
Source: DCMS, [Community Life Survey](#)

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 (%)



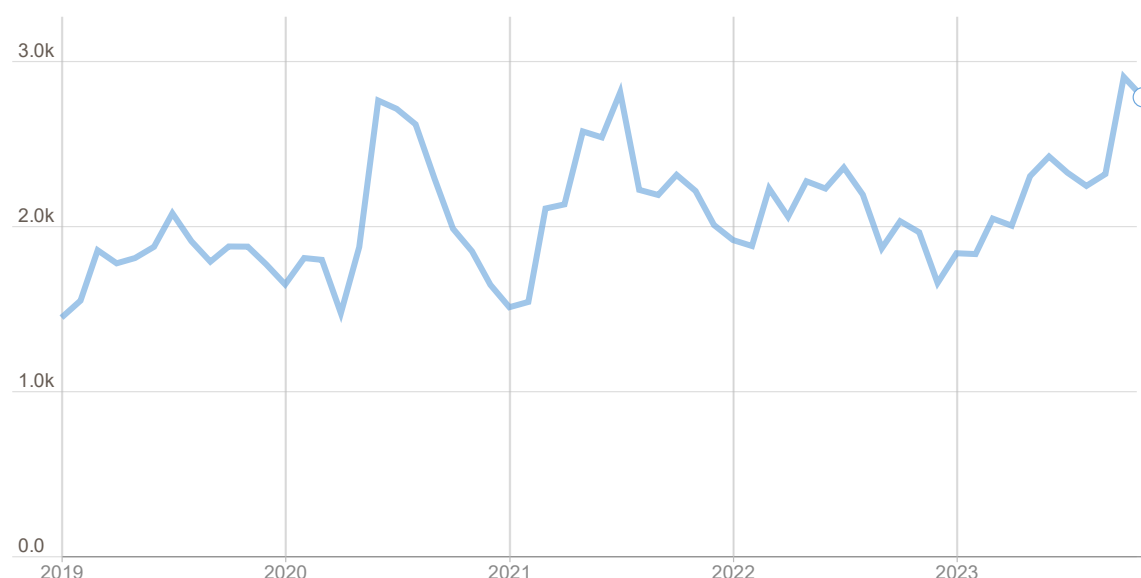
Source: MOPAC, [Public Attitude Survey \(PAS\)](#)

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 September 2023, 95% 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](#)

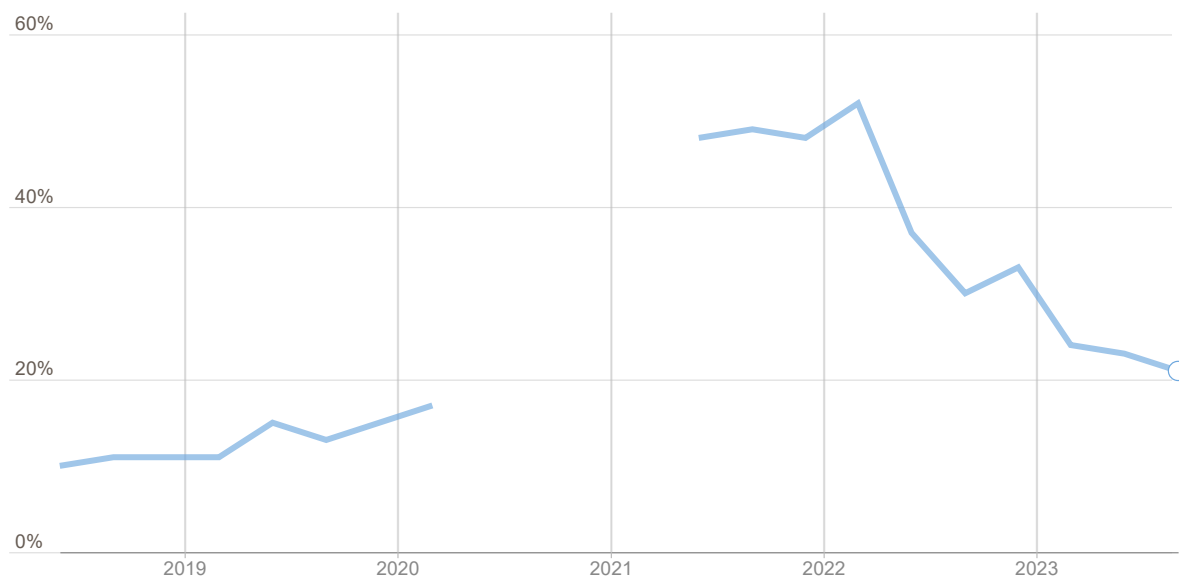
A hate crime is defined as ‘any incident perceived by the victim or any other person to be racist, homophobic, transphobic, or due to a person’s religion, belief, gender identity or disability’. In the pre-Covid period (January 2019 to February 2020), recorded hate crime was around 1,800 offences a month.

After the first national lockdown was imposed, recorded hate crime offences reached a peak of 2,800 in June 2020. It then fell to pre-pandemic levels by the end of the year, before rising to 2,800 offences in July 2021. Since then, hate crimes fell again and by December 2022, 1,700 offences were recorded in the month, slightly lower than the number of monthly recorded hate crimes pre-pandemic. Over the course of 2023, hate crimes have risen and reached a new peak of 2,900 offences a month in October 2023 and remaining high at 2,800 in November 2023 (driven by a surge in antisemitic hate crimes that coincided with the Israel-Gaza war).



### 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 \(PAS\)](#)

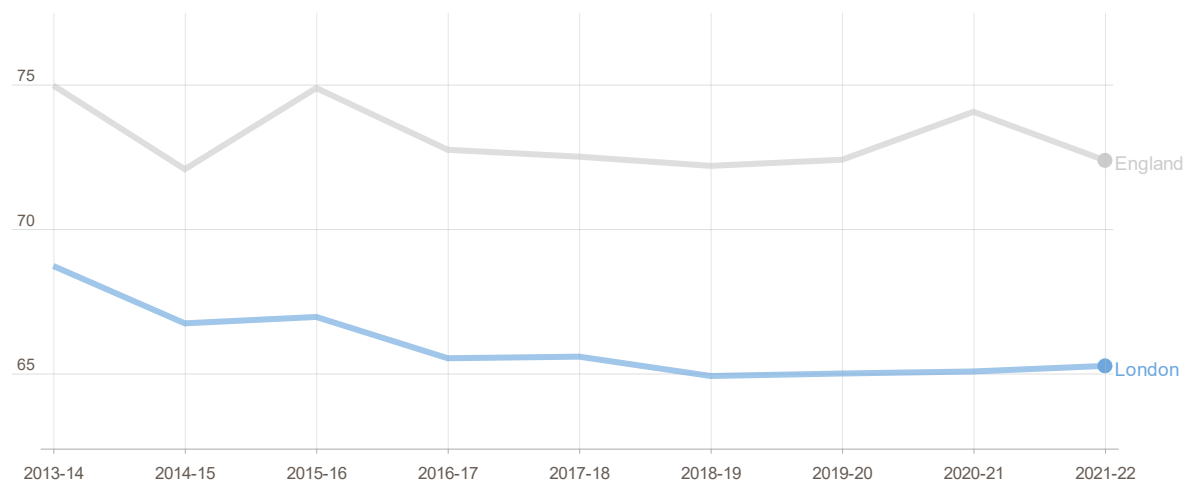
Before the pandemic, MOPAC had been tracking the extent to which residents had thought hate crime was a problem in their area through their Public Attitude Survey (PAS). In each quarter of financial year 2018-19, around 10-11% of adults thought it to be a major or minor problem. In each quarter of financial year 2019-20, around 13-17% of adults considered it a 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, and this has continued to fall over the course of 2023, with the proportion thinking so being 21% in Q3 2023.

## Relationships

**Figure 11: Talking to neighbours**

Proportion who chat to their neighbours at least once a month (%)



Source: DCMS, [Community Life Survey](#)

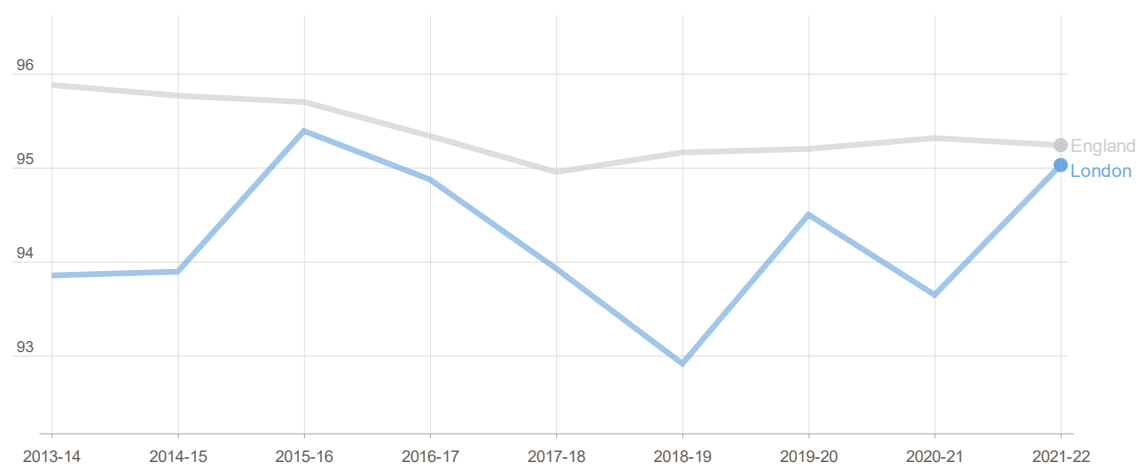
In 2021-22, around two thirds of Londoners (65%) reported chatting to their neighbours at least once a month. This is less than residents across England (72%).

Talking to neighbours has regularly been lower in London compared with England since 2013-14 (on average, by seven percentage points). In particular, it has been regularly lower among younger Londoners aged 16-34 (50%) compared with those aged 35-49 (71%) and ones aged 50 and over (76%).

Moreover, Londoners who own their accommodation were more likely to have chatted to their neighbours often compared with those 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](#)

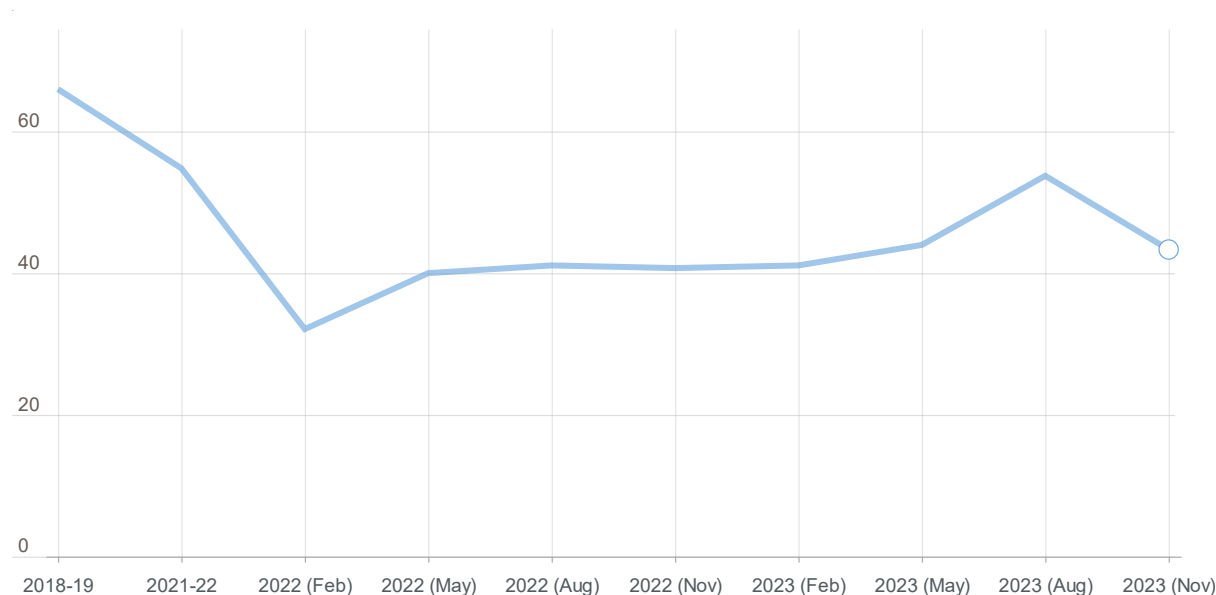
In 2021-22, the majority of Londoners (95%) did agree that there were people who would be there for them if they needed help.

Black Londoners (89%) were less likely than White Londoners (96%) to agree with that statement, while disabled Londoners (91%) were also less likely than non-disabled Londoners (96%) to agree with it.

## 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 (%)



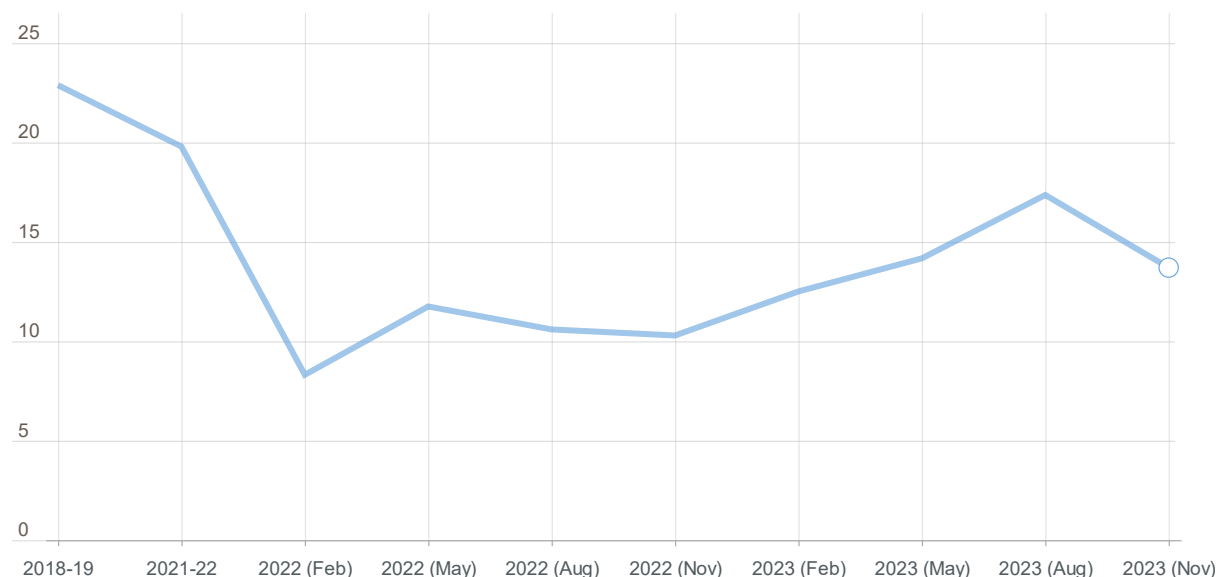
Source: [Survey of Londoners 2018-19](#), [Survey of Londoners 2021-22](#) and GLA/YouGov

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 was 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 previous month. This increased to 40% in May 2022 and remained at this higher level over the course of 2022 and 2023. There was a spike in participation in August 2023, where 54% of Londoners said they had participated in formal culture and events in the previous month, but this returned to a similar level as before (43%) by November.

### 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

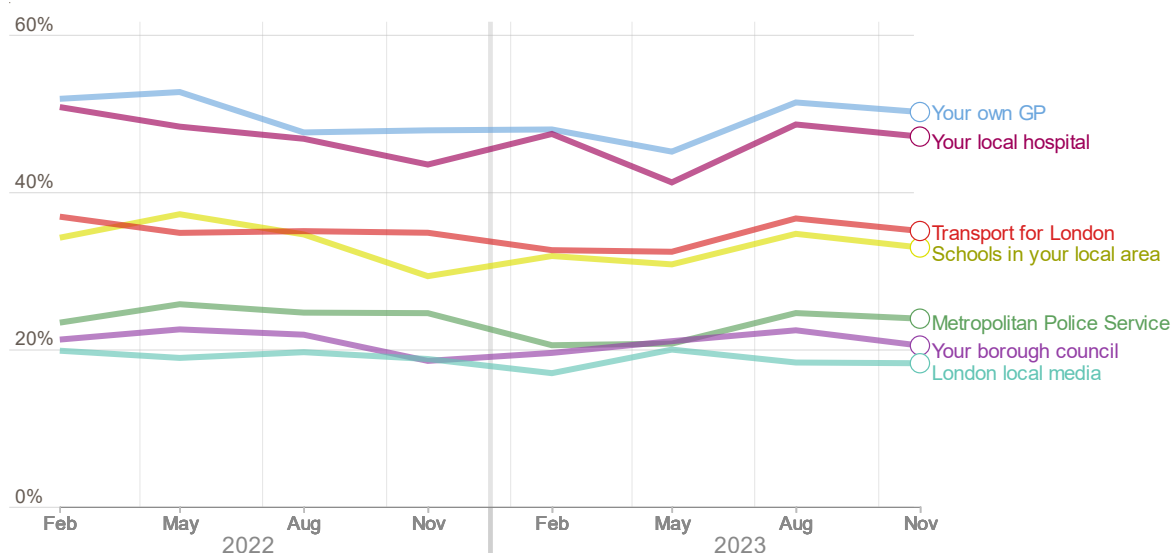
The Survey of Londoners also captured participation in sport. In 2018-19, around a quarter of Londoners aged 16+ (23%) had played sport in the previous month, but this had declined to 20% by the time of the 2021-22 survey. When polled in February 2022, 8% of Londoners had played sport in the last month and this increased noticeably during Summer 2022 to 12% in May 2022, though it had decreased slightly to 10% by November 2022. Over the course of 2023, the proportion of Londoners that had played sport in the previous month increased and, similar to the trend of participation in formal culture and events, peaked in August 2023 at 17% before returning to previous levels (14%) by November.

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.

## 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'.

In November 2023, trust in each of the seven services presented to Londoners had returned to similar levels to when tracking first started in February 2022, with only trust in their local hospital being lower than then (47% compared with 51% respectively).

Londoners are most trusting of medical institutions; their own GP (50%) and their local hospital (47%) were most likely to be scored as trustworthy. Trust in Transport for London (TfL) had declined from 37% in February 2022 to a low of 32% in May 2023 before recovering to 35% in November. Trust in local schools was at 33% in November 2023 and is fairly stable over time, with May 2022 a particular high point (37%) and November 2022 significantly lower (29%).

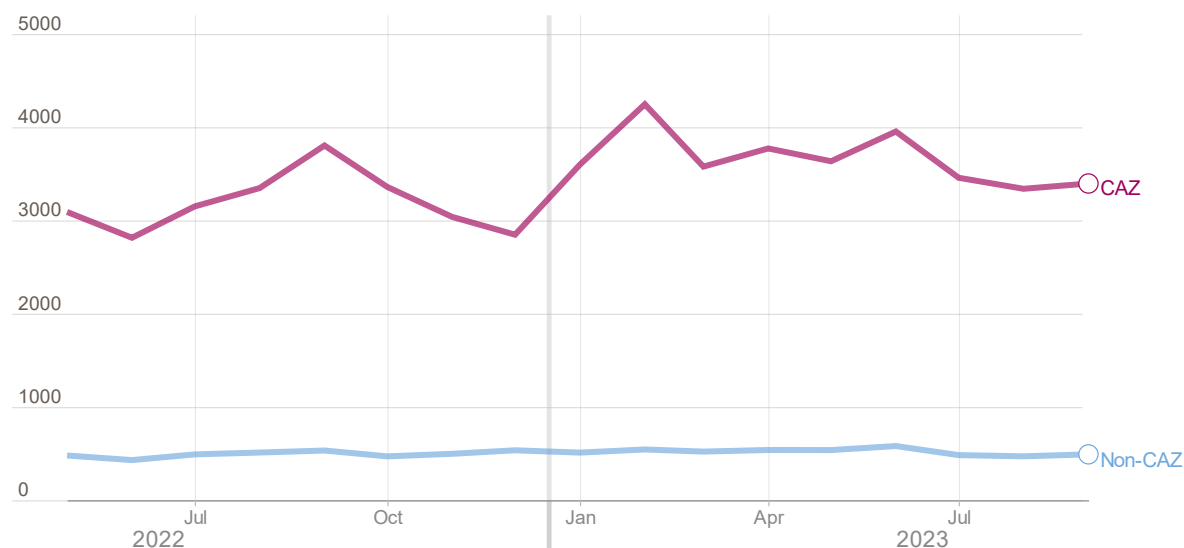
In February 2022, trust was lowest for London media, borough councils and the Metropolitan Police Service (MPS). This remained the case in November 2023, with trustworthiness percentages standing at 18%, 20% and 24% respectively.

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 three years; the [latest data for Q2 2023/24](#) has the proportion of respondents agreeing that the MPS is an

organisation that they can trust at 70%. This compares to 82% in Q2 2020/21. As well as methodological differences, the question used in the PAS is very different to the question in the GLA’s polling, and so the two measures cannot be compared directly.

**Figure 16: Thriving local high streets**

Mean daily visitor footfall in CAZ retail areas vs. non-CAZ retail areas between 12-3pm (retail areas are 350m-wide ‘hexes’; monthly estimates calculated by taking the mean of the daily counts)



Source: Anonymised and Aggregated data by BT

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 in retail areas in London using mobile phone data from BT. The data is based on a sample of the UK’s population multiplied up to the full population<sup>52</sup>.

Mean footfall (defined as the average count per 350m-wide ‘hex’ in CAZ and non-CAZ retail areas) has consistently been higher in CAZ areas compared with non-CAZ areas, since data started being collected in May 2022. There has been very little change in mean footfall in non-CAZ areas over time and, in September 2023, mean footfall across non-CAZ areas was 493 visitors (only slightly greater than the mean of 480 in May 2022).

There has been more fluctuation in mean footfall levels in CAZ retail areas. When data first started being collected in May 2022, the average was 3,092 visitors. It then dipped in the next month before climbing to a high of 3,804 in September 2022. Each month following that saw a decline, with a low of 2,848 in December 2022.

<sup>52</sup> The data might not match up with other estimates of CAZ/non-CAZ counts due to methodological differences.

The trend reversed at the beginning of 2023, peaking at 4,247 visitors in February. Though falling slightly, the mean has remained above 3,300 for the remainder of 2023 up until September, when it stood at 3,397.

This would suggest that retail activity in the CAZ is continuing to strongly rebound throughout 2023, with the mean increasing by nearly 15% since May 2022. In our previous report, we also highlighted that weekend spending in the CAZ is back to levels last seen prior to the pandemic (according to Mastercard data)<sup>53</sup>. This would suggest the recovery in economic activity is ongoing, to the benefit of the many businesses based in the Zone.

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<sup>53</sup> Aggregated and anonymised data by Mastercard.

## 10: CRIME & SAFETY

This chapter explores a range of indicators related to crime and safety.

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

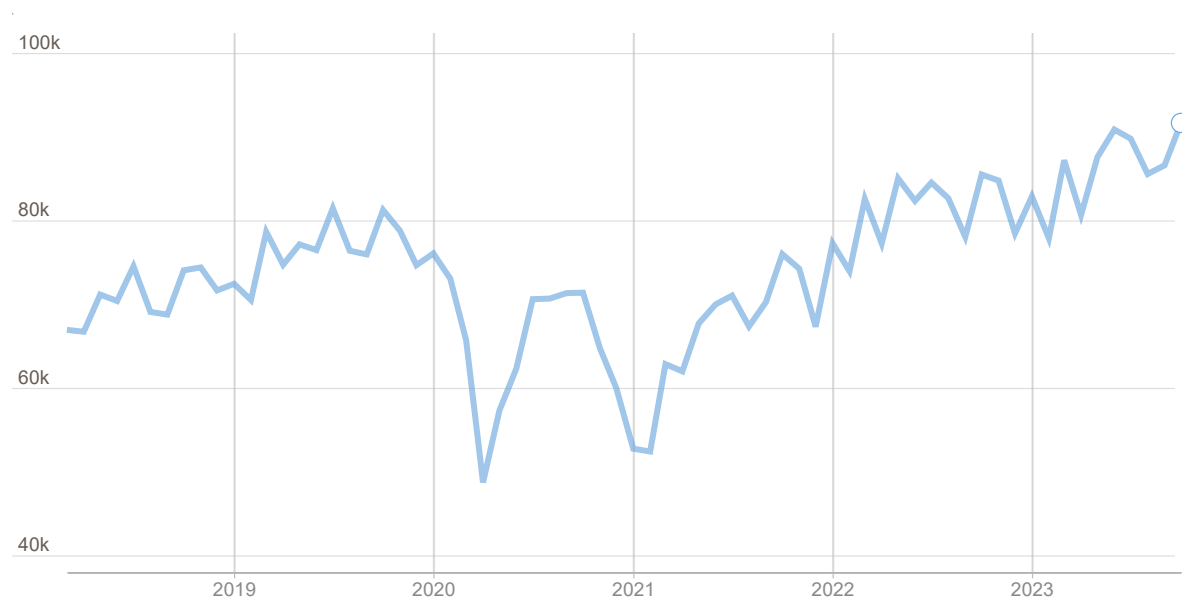
The indicators are all presented at the London level and are primarily derived from publicly available dashboards, including MOPAC's [Victims and witnesses are better supported dashboard](#), the NFIB (National Fraud Intelligence Bureau) Fraud and Cyber Crime Dashboard, and the [MPS \(Metropolitan Police Service\) Crime Data Dashboard](#).

Where feasible, we present data from 2018 onwards to enable a comparison of trends before, during, and after the pandemic.

### Total Crime

**Figure 1: Total Notifiable Offences (TNOs)**

Number of offences recorded by the MPS (thousands)



Source: MPS (Metropolitan Police Service) [Crime Data 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 within London. As shown in Figure 1, profound reductions in total crime<sup>54</sup> were recorded during these periods, although differential impacts were observed by crime type.

<sup>54</sup> As measured by Total Notifiable Offences (TNOs)



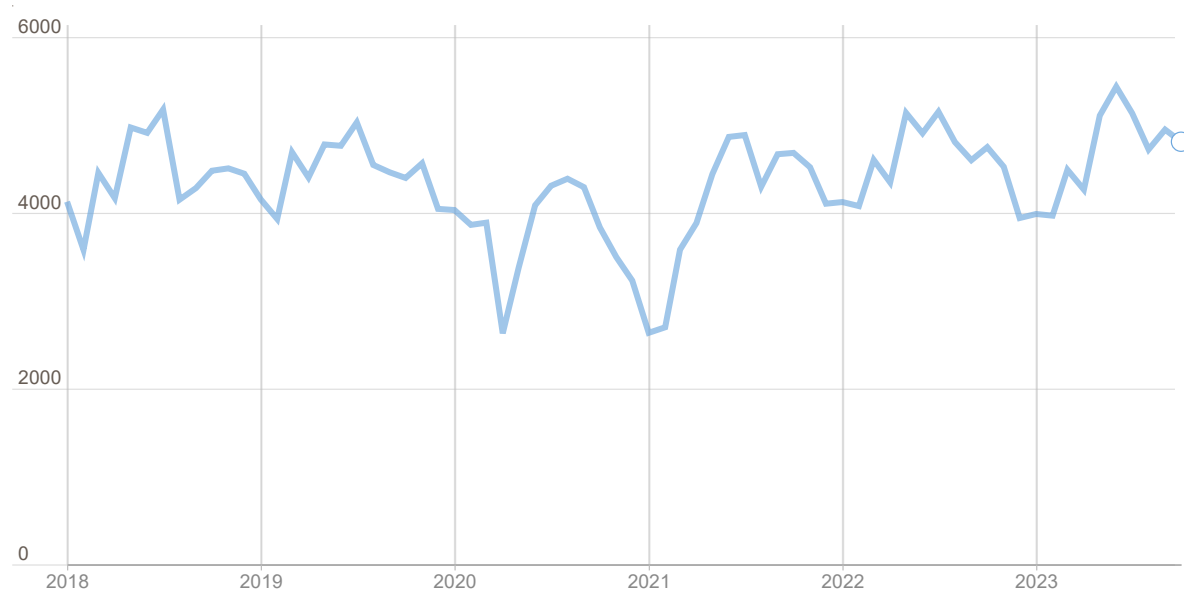
This disparity continued into the recovery period, with some crime types surpassing their pre-pandemic monthly offending levels, whilst others remained significantly below.

Overall, however, an upward trend in offending levels is shown as we move further through the recovery period. The period January 2023 to October 2023 had 6% more offences (TNOs) than the same period in 2022 (860,535 versus 809,074).

## Violence

**Figure 2: Non-Domestic Violence with Injury Offences**

Number of offences recorded by the MPS



Source: MPS (Metropolitan Police Service) [Crime Data Dashboard](#). The above chart does not include any offence that has been flagged as being a Domestic Abuse (DA) offence. The data has been derived through subtracting the Violence with Injury offences flagged as being Domestic Abuse from the total Violence with Injury offences.

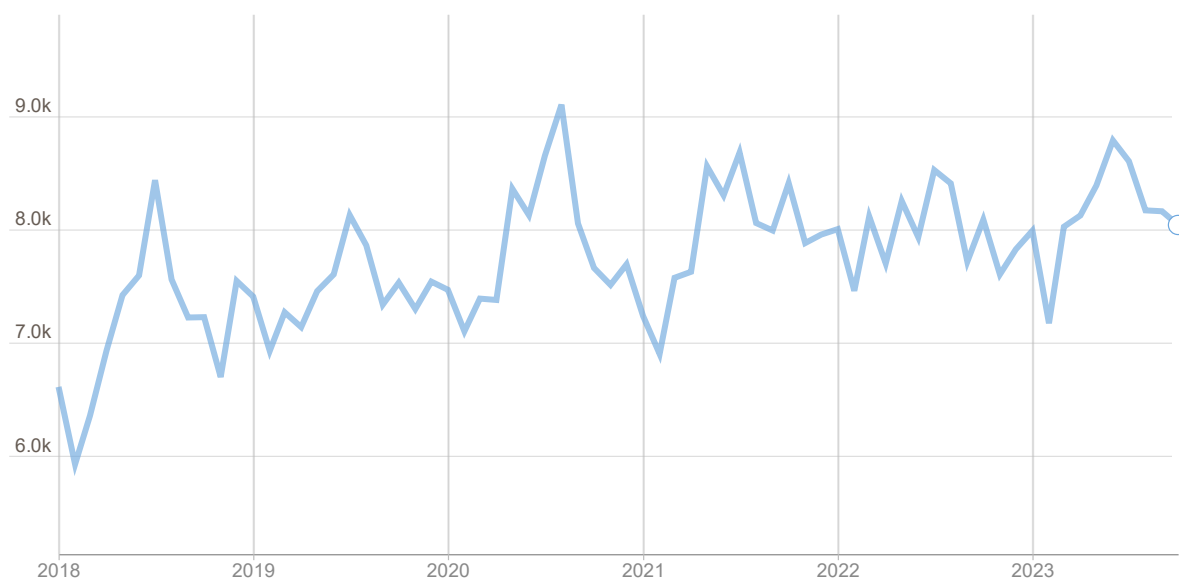
The pandemic resulted in significant reductions in violence with injury offending recorded by police, with April 2020 recording 32% fewer offences than the month before.

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

During 2021, an upward trend was observed, with offending rates back to their pre-pandemic levels. This was maintained throughout both 2022 and the current year, with the October 2023 data showing a 9% increase on October 2019.

### Figure 3: Domestic Abuse Offences

Number of offences recorded by the MPS (thousands)



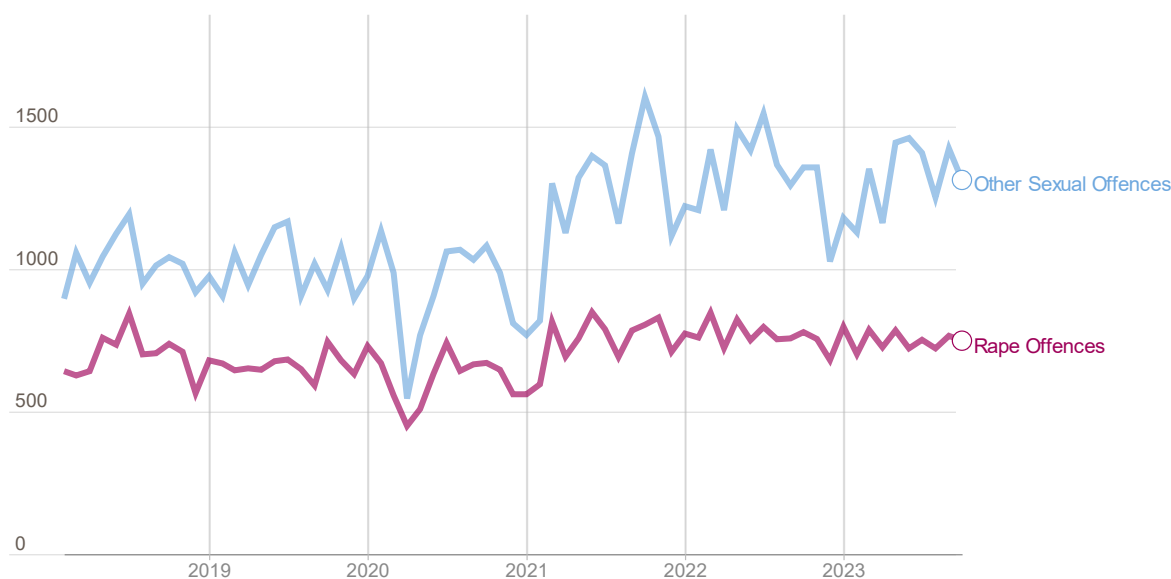
Source: MPS (Metropolitan Police Service) [Crime Data Dashboard](#). The data in the chart refers to Domestic Abuse Offences, not Domestic Abuse Incidents. Please note that there is no specific offence of Domestic Abuse. Domestic abuse-related offences are defined as any incidence of threatening behaviour, 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.

Since 2018, there has been a general upward trend in Domestic Abuse offences recorded by the police, with increases broadly levelling off in 2023. The period from January to October 2023 witnessed a 2% increase in Domestic Abuse compared to the same period in 2022; it represented a 14% increase on the same period in 2018.

June 2023 had the second highest monthly offending total in the last six years (8,787 offences), with only August 2020 recording a higher number (9,103 offences).

### Figure 4: Sexual Offences

Number of offences recorded by the MPS



Source: [MOPAC Violence Data Dashboard](#). The chart distinguishes between Rape Offences and Other Sexual Offences, which when combined are referred collectively as “Sexual Offences.”

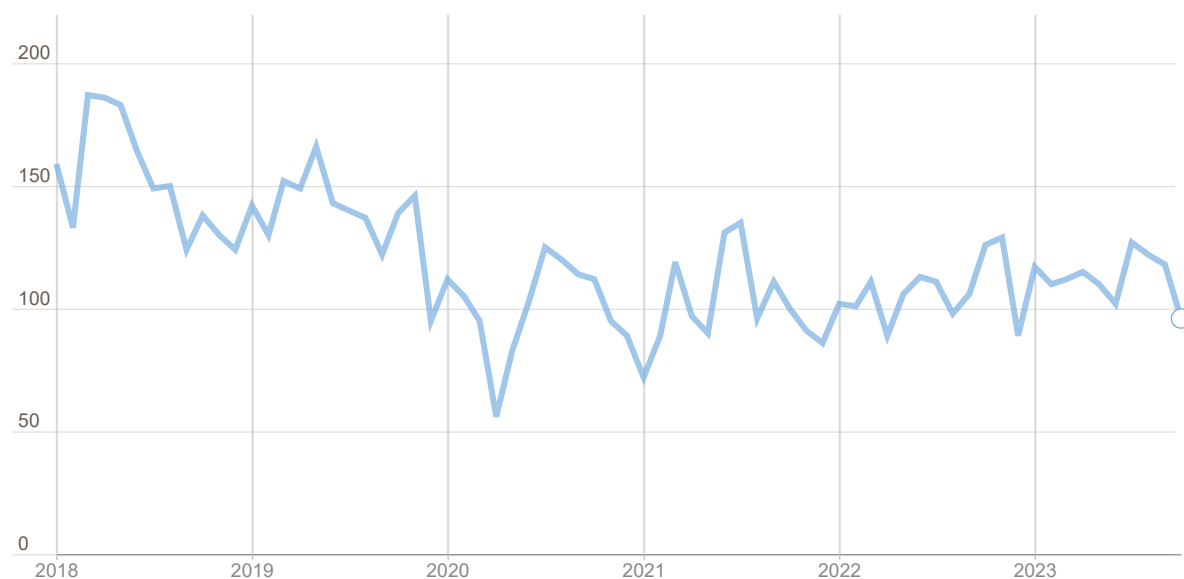
Incidence of Rape and Other Sexual offences was fairly stable in 2018 and 2019, before dipping during the COVID-related lockdowns and increasing again from March 2021.

Rape offences have stabilised at around 700 to 800 incidents since 2022, while the number of Other Sexual offences has remained much higher than they were in 2020 and 2021. The period January 2023 to October 2023 had 30% more offences than the same period in 2019, and 37% more offences than in 2020.

During the year to date, just over a third of the total Sexual Offences were classified as Rape (7,509 offences, or 36%). This is consistent with the two previous calendar years.

### Figure 5: Non-Domestic Knife Crime with Injury Offences – Victim U25

Number of offences recorded by the MPS



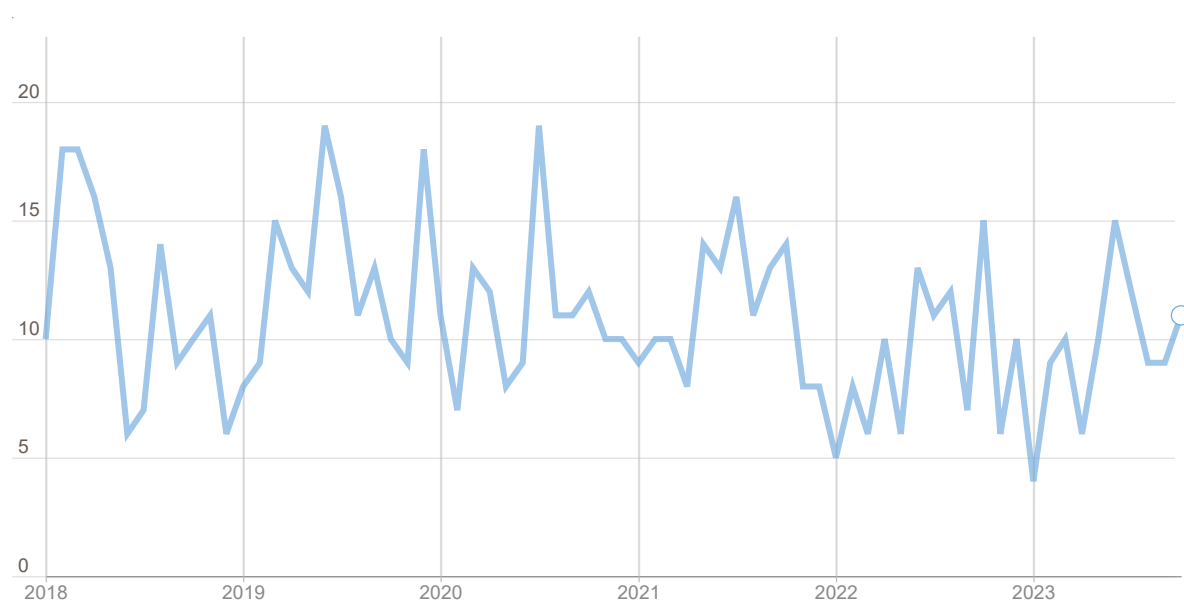
Source: [MOPAC Violence Data Dashboard](#). The above data refers only to offences where a victim is under the age of 25 and has been injured in a Non-Domestic Abuse knife incident. Please note, however, that the age qualifier only refers to the victims, meaning that the offender(s) may be aged over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

There was a decrease in the number of non-domestic knife crime victims under the age of 25 between 2018 and early 2020. This was followed by a pronounced drop at the start of the pandemic and a further reduction in January 2021.

Since 2020, the number of offences has increased, although the recorded number remains lower than it was pre-pandemic. The period from January to October 2023 recorded 6% more offences than the same period in 2022 (1,129 versus 1,063).

### 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 monthly number of homicides since 2018, ranging from a low of four in January 2023 to 19 in both June 2019 and July 2020.

The period between the latter half of 2022 and March 2023 saw relatively fewer homicides. Of the 53 homicides recorded between January 2023 and June 2023, 13% (or 7) were classified as Domestic Abuse homicides.

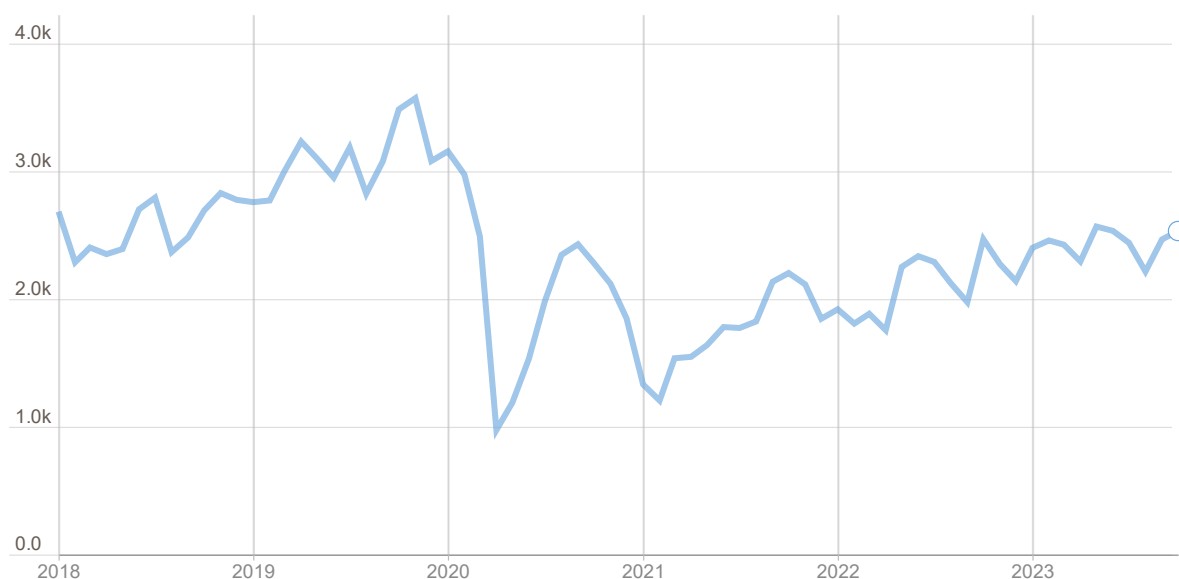
During the same period, 62% of homicides (33) involved the use of a knife/sharp instrument.

Males are still over-represented as victims (77% of all victims in the period January-June 2023), while 40% of all homicide victims were under-25.

## Acquisitive Crime

### Figure 7: Personal Robbery

Number of offences recorded by the MPS (thousands)



Source: MPS (Metropolitan Police Service) [Crime Data Dashboard](#).

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

Figure 7 shows that after the significant drop at the onset of the pandemic, offending rates have broadly increased since 2021.

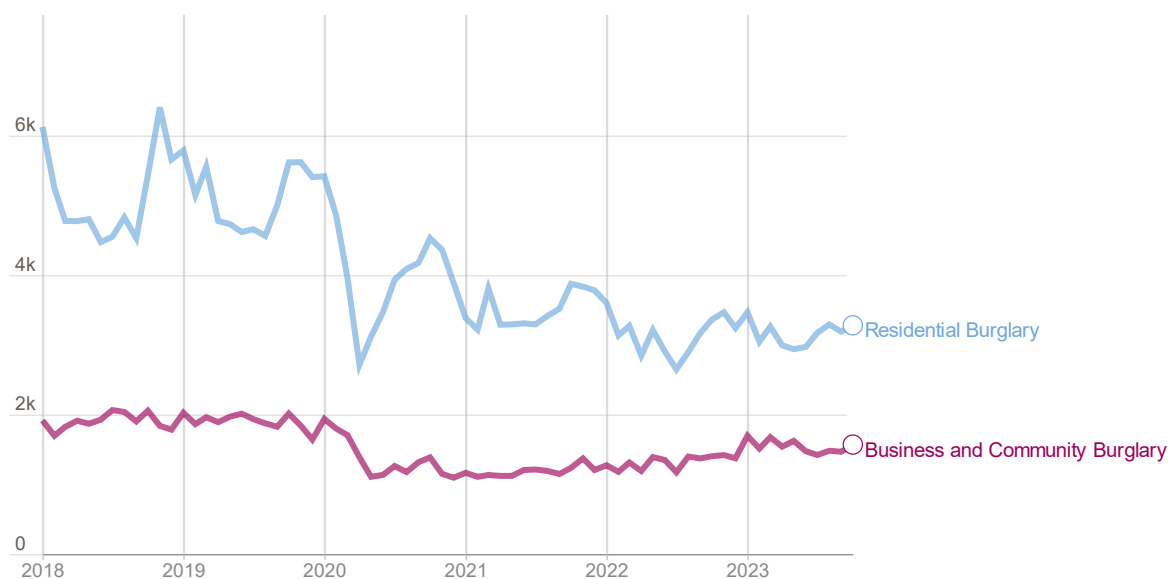
In general, periods of reduced offending align closely to pandemic-induced lockdowns. This suggests that reduced footfall may well have contributed to reduced offending.

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

The period January 2023 to October 2023 recorded 17% more robberies than the same period in 2022, and 43% more than in 2021.

### 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.

Pre-pandemic, both Residential and Business and Community Burglary offending levels were stable, with monthly totals rarely deviating from the mean.

However, in April 2020, burglary offending fell sharply. Residential Burglaries fell by 43% compared to April 2019, while Business and Community Burglaries fell by 27%.

Following this dip in offending, overall burglary levels have remained lower than pre-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 3,500 a month. In contrast, Business and Community Burglary has seen an upward trend since March 2021.

The period January 2023 to October 2023 recorded 7% more burglary offences than the same period in 2022 (47,084 versus 44,104).

Over the last three years, the proportion of burglaries committed at domestic premises decreased. In the 2023 year to date, just over two-thirds of total burglaries were committed at domestic premises (67%), whereas this percentage stood at 75% in 2021 and 70% in 2022.

### Figure 9: Theft from Motor Vehicle Offences

Number of offences recorded by the MPS (thousands)



Source: MPS (Metropolitan Police Service) [Crime Data Dashboard](#).

Following a surge in levels 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 levels a year earlier. Offending spiked in the middle of 2020 before falling again during the second lockdown at the end of 2020 and into 2021.

Since late 2021, monthly offending levels have remained relatively stable, although below levels seen pre-pandemic. The current year to date (January-October 2023) recorded 6% less Theft from Motor Vehicle offences than the same period in 2022 (50,899 versus 54,166).

It is also worth noting that October 2023 witnessed a sharp increase in offending compared to all the preceding months in 2023. This increase is consistent with the seasonality pattern for Theft from Motor Vehicle offending. Over the last six years, October has consistently been one of the three months featuring the highest volume of offending.



### Figure 10: Theft from Person Offences

Number of offences recorded by the MPS (thousands)



Source: MPS (Metropolitan Police Service) [Crime Data Dashboard](#).

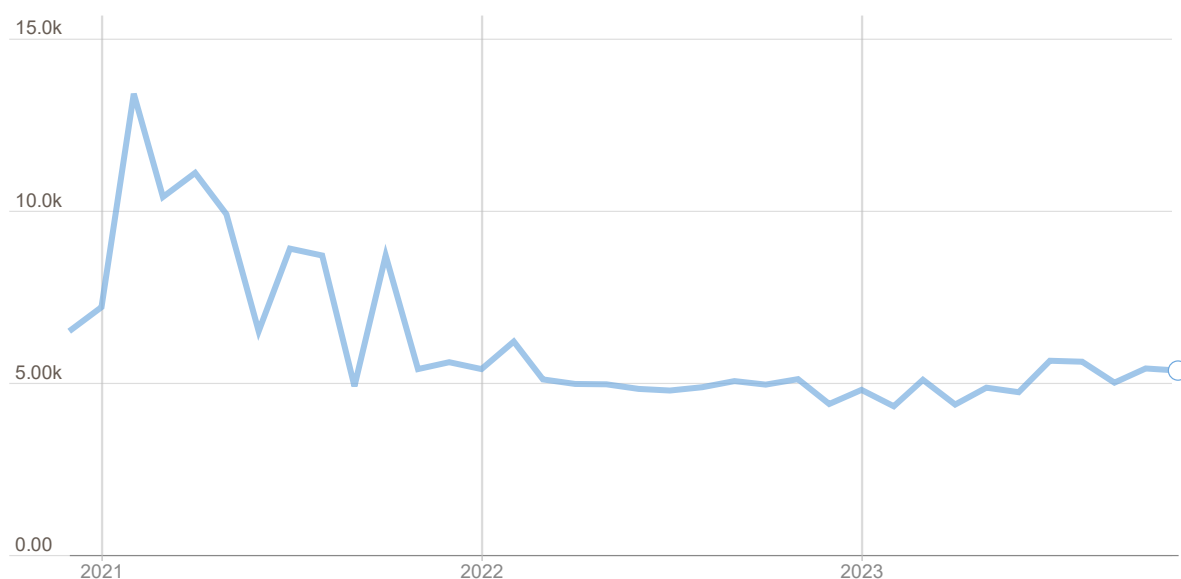
An upward trend in Theft from Person offending was apparent throughout 2018 and 2019, before falling very sharply at the start of the first national lockdown (with April 2020 offences down 80% on the previous month). Offending levels rose in mid-2020, before falling again during the second lockdown.

The increase in offending resumed in mid-2021, with numbers surpassing pre-pandemic levels by the end of 2022. The increase continued throughout 2023, with the period January-October recording 24% more Theft from Person offences than the same period in 2022, and 96% more than the year before that.

It is also worth highlighting the significant increase (34%) in offending shown between September and October 2023. This remains consistent with historical trends, which show Theft from Person offences peaking in the winter months in London (although 2020 was an anomalous year and did not exhibit this trend). Despite this expected seasonality, the level of offending shown in October 2023 is higher than any other month in the last six years.

### 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, before steadily decreasing through to early 2022. Since then, the volume of recorded fraud and cyber-crime offences has remained fairly stable.

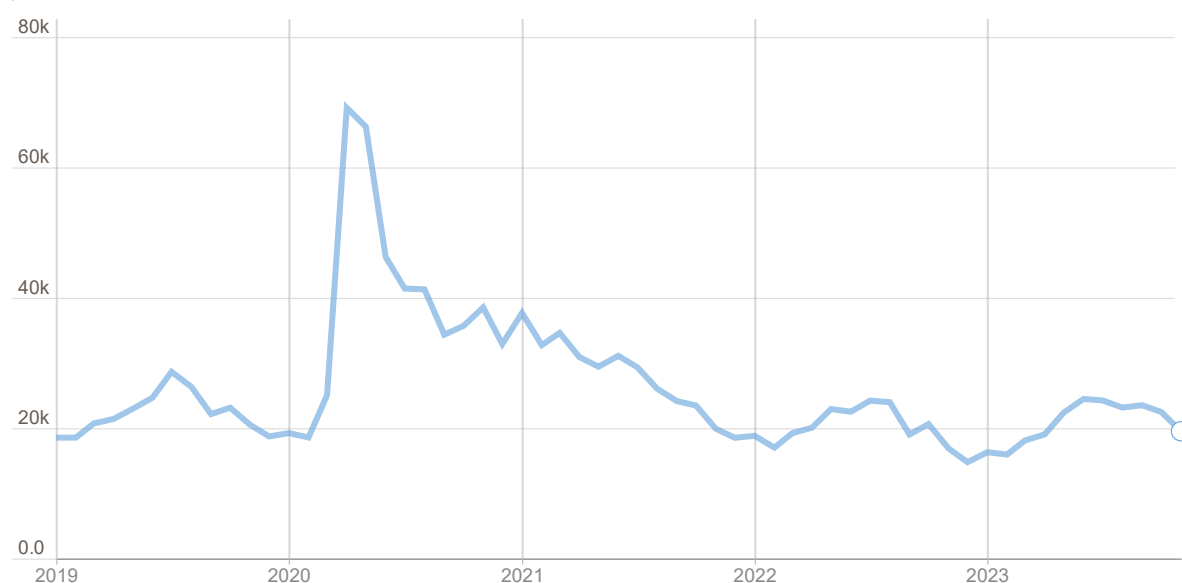
Of the 64,694 reports recorded in the most recent 13-month period, 90% related to fraud (58,193) and the remaining 10% related to cyber-crime (6,501). Collectively, these incidents resulted in a total reported loss of £709.5 million.

Individuals were victims much more frequently than organisations (89% versus 11%). While no gender differences in victimhood were found, younger individuals (i.e., those aged 20-39) were more likely to have been victims.

## Safety

**Figure 12: Anti-Social Behaviour**

Number of calls received by the MPS (thousands)



Source: London Datastore, [MPS Anti-Social Behaviour dataset](#). The data in the chart refers to calls made to the MPS to report Anti-Social Behaviour (based on Opening Type Code 1) 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. The source of the data changed from December 2022 onwards. This dataset may contain duplicate calls to the same incident.

While the total Anti-Social Behaviour (ASB) calls received by the MPS are a combination of Personal, Nuisance and Environmental ASB calls<sup>55</sup>, the vast majority (87%) relate to Nuisance ASB.

The onset of the pandemic brought a significant increase in ASB calls. Compared to February 2020, March showed a 35% increase in calls, April showed a 272% increase and May showed a 257% increase.

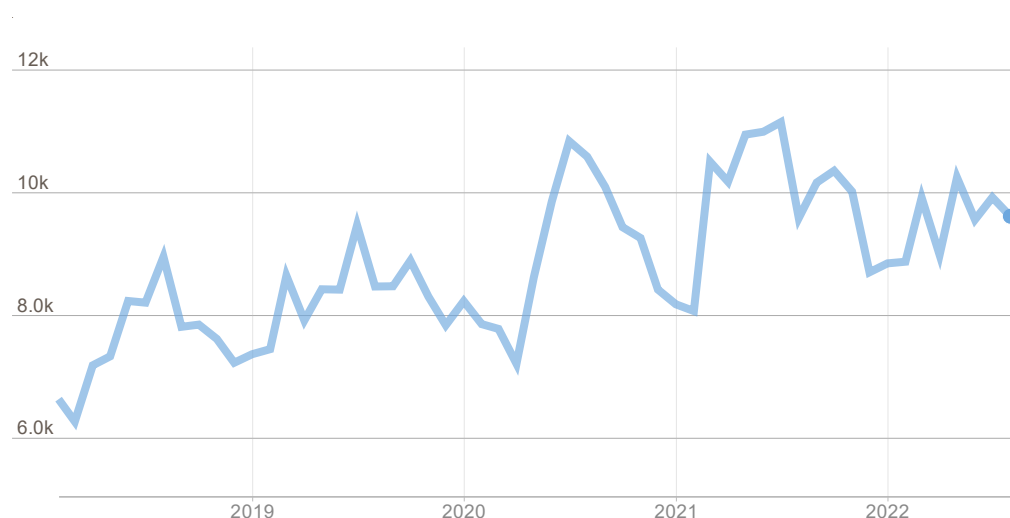
At the start of the pandemic, before a specific dedicated code was introduced by the MPS to denote COVID-19 related calls, these calls were also classified as Nuisance ASB calls. This is likely to explain much of the increase in this type of call during that period, and could overstate the level of Nuisance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

ASB calls reduced from summer 2020 onwards, so that by mid-2022 they fell below 2019 (pre-pandemic) levels. From February 2023 until early summer, there was a steady increase in ASB calls, before a slight tail off from early summer to November.

<sup>55</sup> 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 increased over the last four years, although temporary dips were observed during the pandemic lockdowns.

Currently, overall offending remains elevated and above pre-pandemic levels, with August 2022 recording a 14% increase on August 2019.

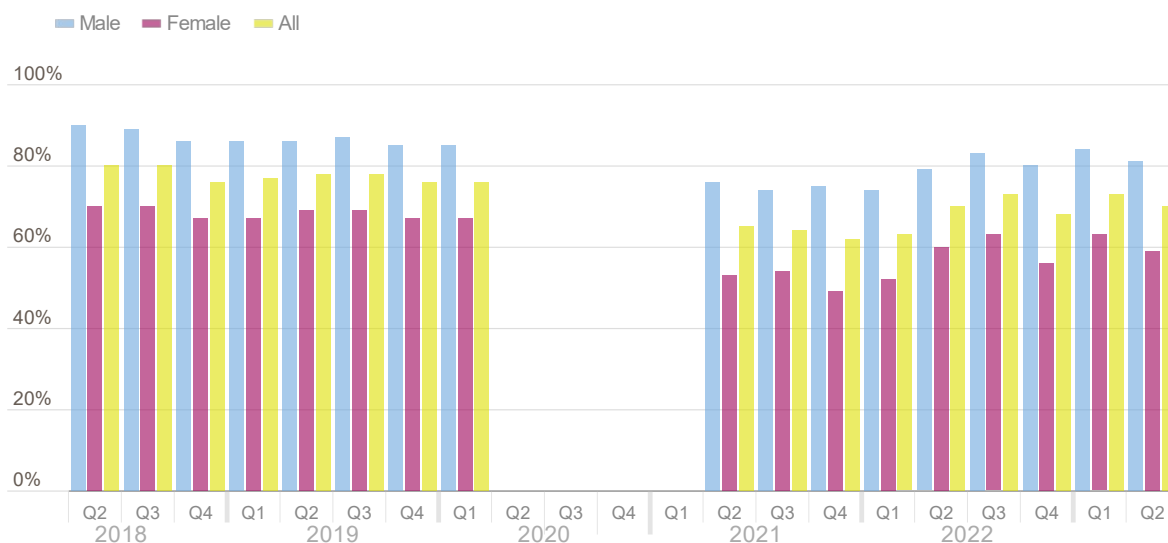
While a substantial proportion of the increase in Harassment offending can be explained by amendments to the Home Office counting rules for Stalking offences<sup>56</sup> and an increase in police officer awareness, it is likely that there also was an *actual* increase in the number of offences reported.

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<sup>56</sup> 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



Source: MOPAC [Victims and witnesses are better supported dashboard](#). 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.

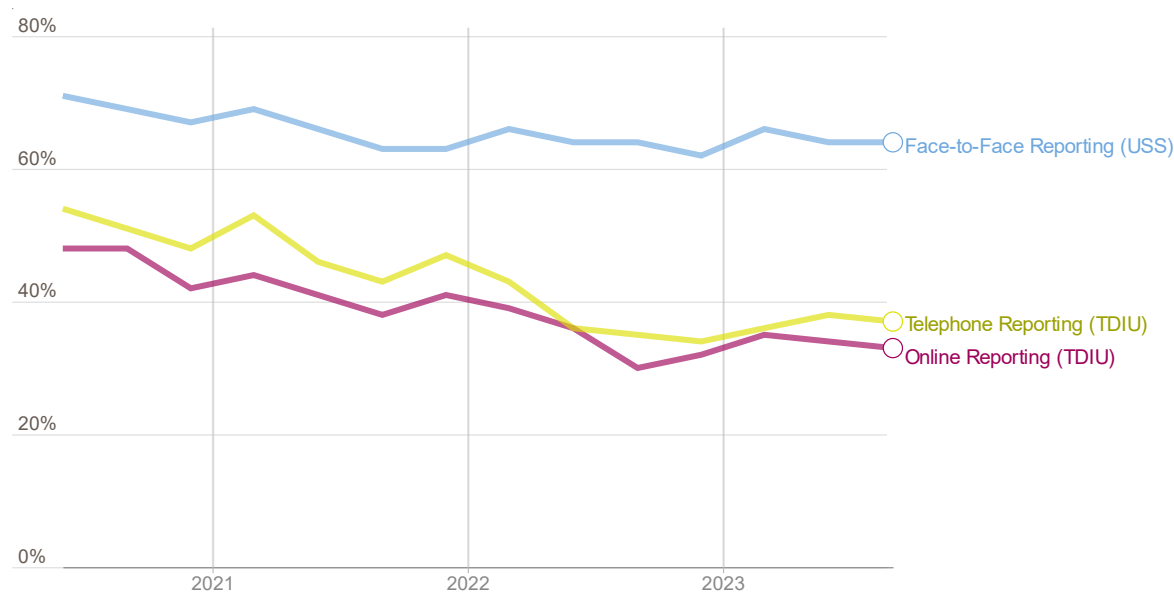
A much greater proportion of female respondents feel unsafe walking alone in their local area after dark than male respondents.

Prior to the pandemic, around a third of female respondents felt unsafe compared to one in eight male respondents. During the pandemic, these feelings of safety have deteriorated for both groups of respondents. However, the proportion of females who feel unsafe continued to be significantly higher than that of males.

In the most recent quarter (Q1, 2023-24), 81% of males felt safe walking alone in their local area after dark, compared to 59% of females. Both proportions are a reduction from the quarter before (Q4, 2022-23); although it should be noted that the quarterly data points are fairly fluid.

### Figure 15: Satisfaction Level of Reporting Victims (MPS)

Percentage of survey participants (USS/TDIU)



Source: MOPAC [Victims and witnesses are better supported dashboard](#). Data sourced from the [User Satisfaction Survey](#) and the [Online Victim Satisfaction Survey](#) for Q2 2023-24. The demographic comparisons are based on the R12 period to Q2 2023-24. 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 action and treatment.

This level of satisfaction is significantly higher for victims reporting crimes face-to-face (64%) than that for victims using online or telephone reporting. Victims reporting crimes online generally had the lowest overall satisfaction level in recent years.

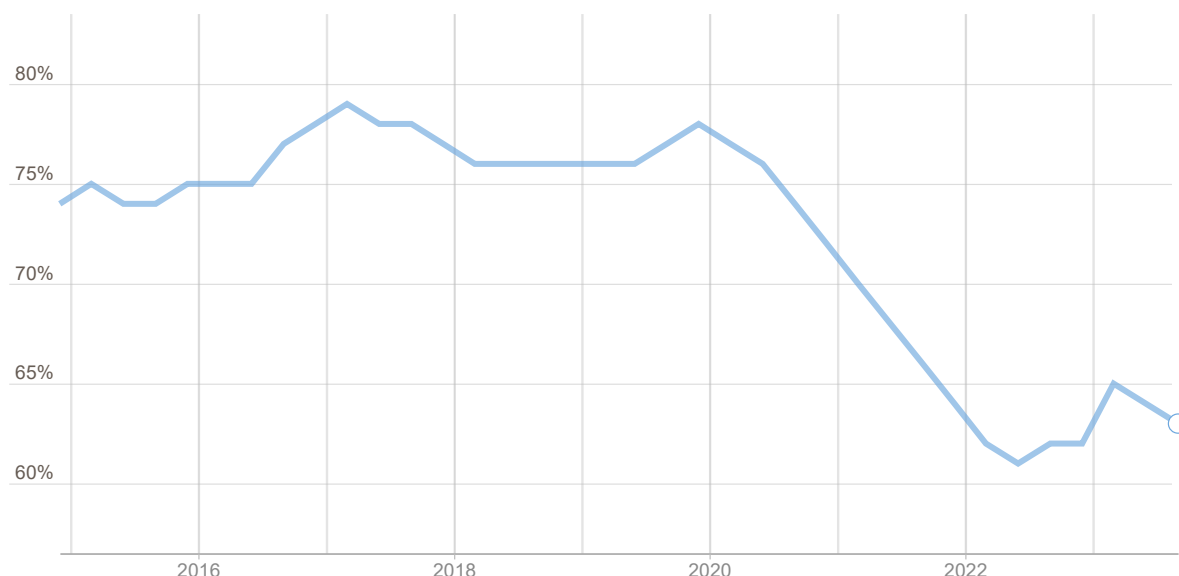
The divergence in satisfaction trends by reporting method is widening. Victim satisfaction for face-to-face crime reporting has been broadly stable over the last four years, but satisfaction levels for crimes reported by telephone and online have declined over this period by 17 and 15 percentage points, 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.

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.

### 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: Source: MOPAC [Trust and Confidence Dashboard](#) Data derived from the [Public Attitude Survey](#) (PAS). R12 month datapoints. Percentage of respondents who agree the MPS treat everyone fairly regardless of who they are.

Between 2020 and 2021, the percentage of survey respondents who agreed that the police treat everyone fairly, regardless of who they were, declined significantly (from around 77% to 67%). The rate was even lower throughout 2022 (at 62%). However, for the current year to date, it increased slightly to 64%.

It is worth noting that this decline may be linked in part to a change in the interview methodology that was introduced to the survey in April 2020.

Young people (15-24 years) were least likely to agree that the police treat everyone fairly.

Respondents of Black (56%) and Mixed (52%) ethnicities were less likely to agree with that sentiment than respondents from other ethnic groups, while the proportion of LGBT+ respondents who agreed with the statement was significantly lower than that for non-LGBT+ respondents (39% versus 64%).

## 11: TRANSPORT & DIGITAL INFRASTRUCTURE

This chapter covers the state of London’s transport and digital infrastructure and changes in travel patterns over time.

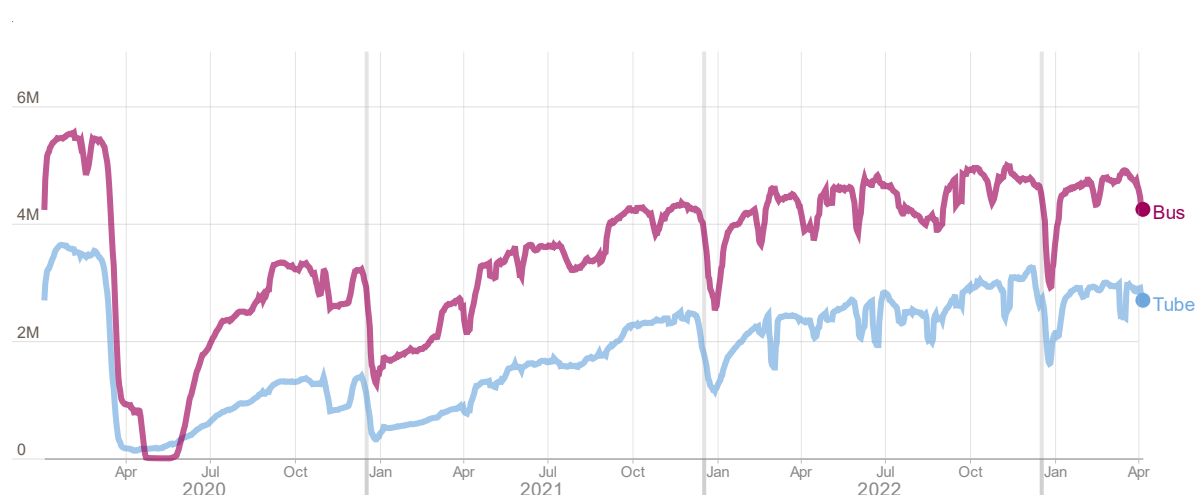
The transport section draws mainly on summary indicators from the ‘[Travel in London](#)’ (TiL) report, an annual publication by TfL which provides trends and developments relating to transport and travel in London. It focuses on those indicators that form part of a data-led tracker that TfL developed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

The digital infrastructure section examines availability of fibre 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 Resilience Dashboard](#). For more detailed data, see the [TfL Network Demand dashboard](#).

Demand for public transport 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<sup>57</sup>.

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

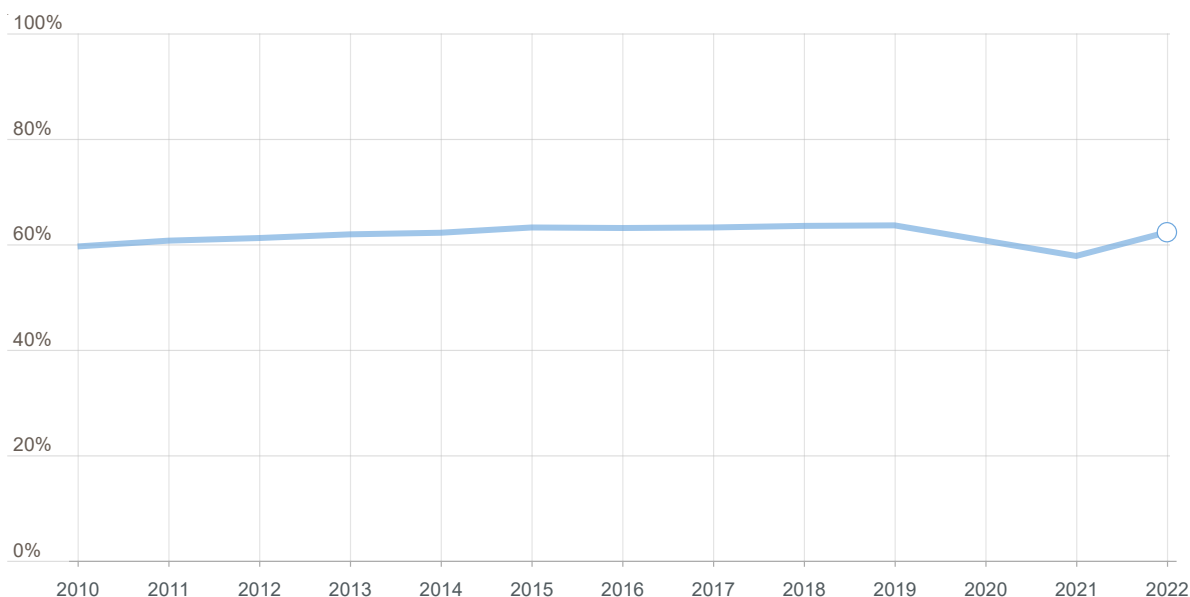
<sup>57</sup> Annual MTS update, 2023. Recent data indicates consistent demand, aligning with early 2023 levels. The upcoming report will include updated data reflecting the latest trends.



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 [‘Travel in London 2023’](#).

Active, efficient and sustainable travel is defined as trips made by public transport, walking or cycling. The proportion of total trips made by these modes steadily increased from 59.6% in 2010 to 63.6% in 2019. During the pandemic it fell to 60.7% in 2020 and 57.8% in 2021, recovering to 62.3% in 2022. The continuing relative shortfall in public transport trips means the overall proportion of trips made by active, efficient and sustainable modes<sup>58</sup> has not yet returned to pre-pandemic levels.

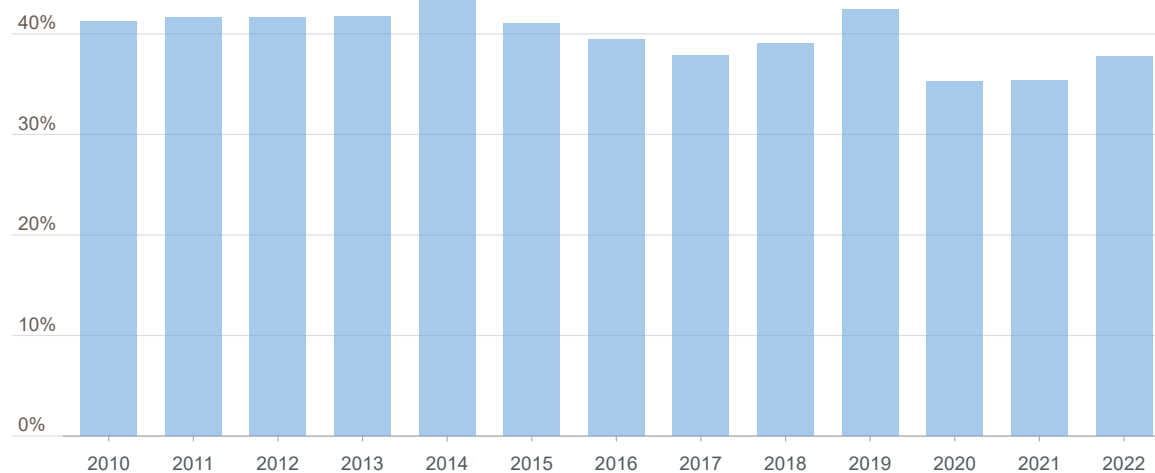
The impact of the pandemic on the proportion of trips made by active, efficient and sustainable modes was relatively modest. While the proportion of trips made by public transport fell, this was compensated for by an increase in the share of trips that were made by active modes (i.e., walking or cycling), particularly during periods of formal restrictions.

<sup>58</sup> See Travel in London 2023 report for a detailed breakdown of active, efficient and sustainable trips.

## 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 [‘Travel in London 2023’](#).

Active travel is good for both the environment and people’s health. Walking and cycling can be used exclusively for many trips, but walking is often used incidentally to access public transport (for example, on the daily walk to the local station to catch a train).

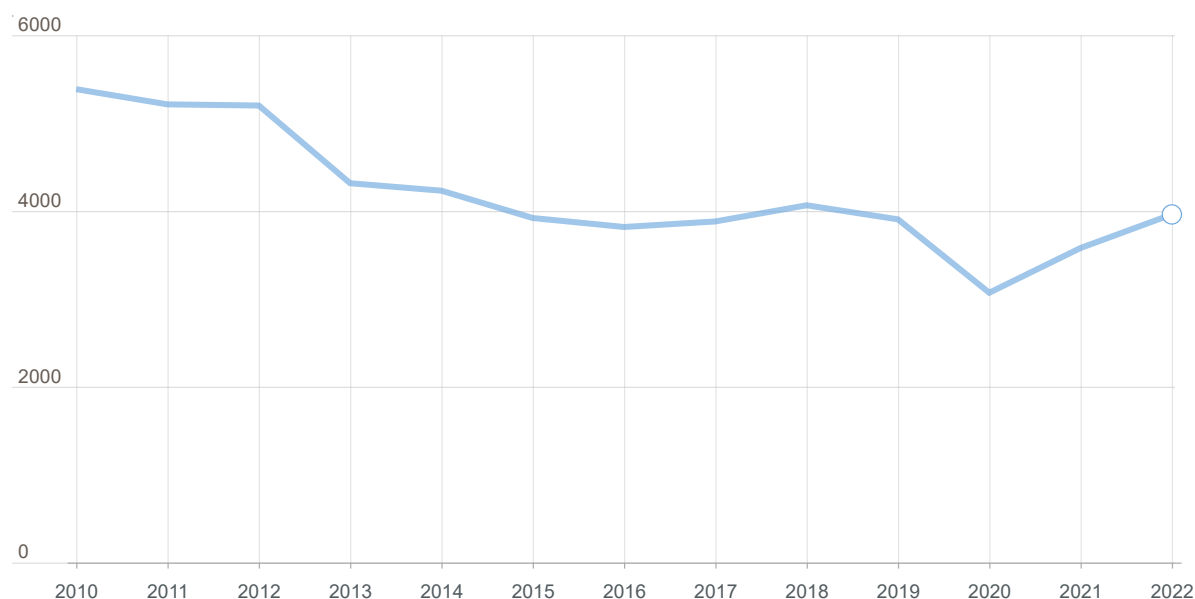
Historically, the proportion of Londoners achieving at least 20 minutes of active travel per day has been relatively flat at around 40 per cent. The pandemic had a mixed effect on this indicator. Increased local and active travel during lockdowns was offset by overall mobility restrictions and a significant decline in public transport usage. Consequently, this measure fell slightly during the pandemic. The latest data suggest it is starting to increase and was 38 per cent in 2022.

This indicator is thought to be particularly affected by the continuing relative shortfall in public transport trips, which often include an active travel component. The London Travel Demand Survey (LTDS) suggests that, where these trips are not made (for example as part of a hybrid working pattern), other trips made at equivalent times are not sufficient to compensate in terms of daily recommended active travel overall.

## Safety on Transport

**Figure 4: Road traffic collisions**

Number of people killed or seriously injured (KSI) on London's roads



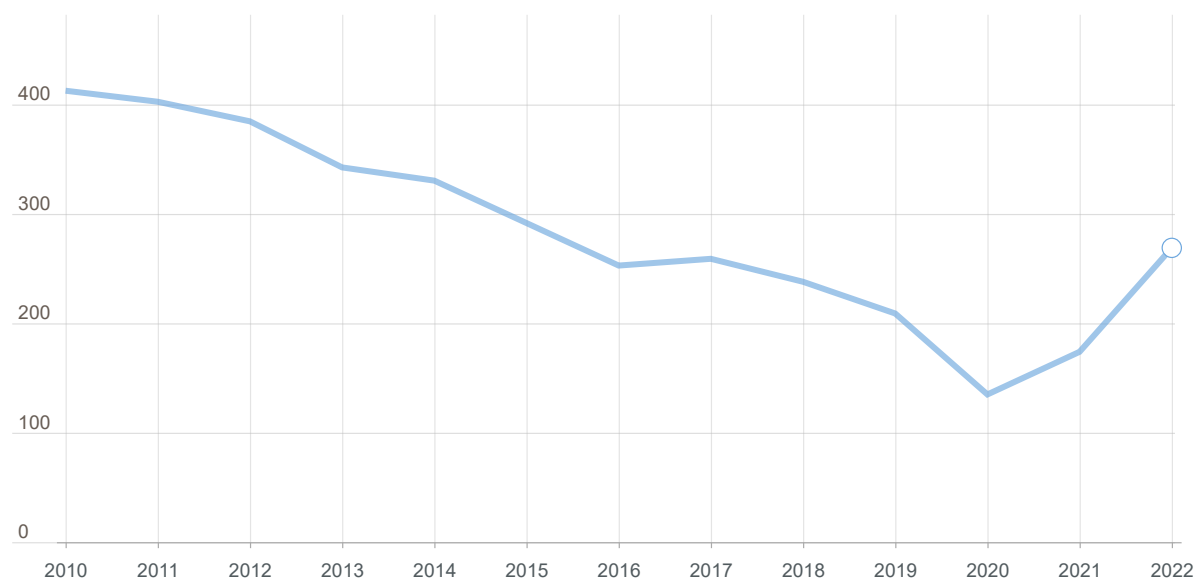
Source: TfL [‘Travel in London 2023’](#).

During 2022, there were 23,465 reported road traffic collisions in London, resulting in 102 people being killed, 3,859 being seriously injured and 23,246 being slightly injured.

The number of people killed or seriously injured on London roads followed a downward trend over the decade from 2010-2020. During the pandemic, reduced traffic levels led to a significant decline in fatalities and serious injuries on London's roads. However, 2022 saw a reversion to numbers and patterns of injury seen prior to the pandemic, as travel increased. These changes led to a two per cent increase in the number of people injured (all severities) in road traffic collisions in London relative to 2021, and an 11 per cent increase in the number of people that were killed or seriously injured. However, compared to the pre-pandemic 2017-19 average, the number of people killed declined by 17 per cent and the total number of injuries was down by 12 per cent.

### Figure 5: Safety on the bus network

Number of people killed or seriously (KSI) injured by a bus



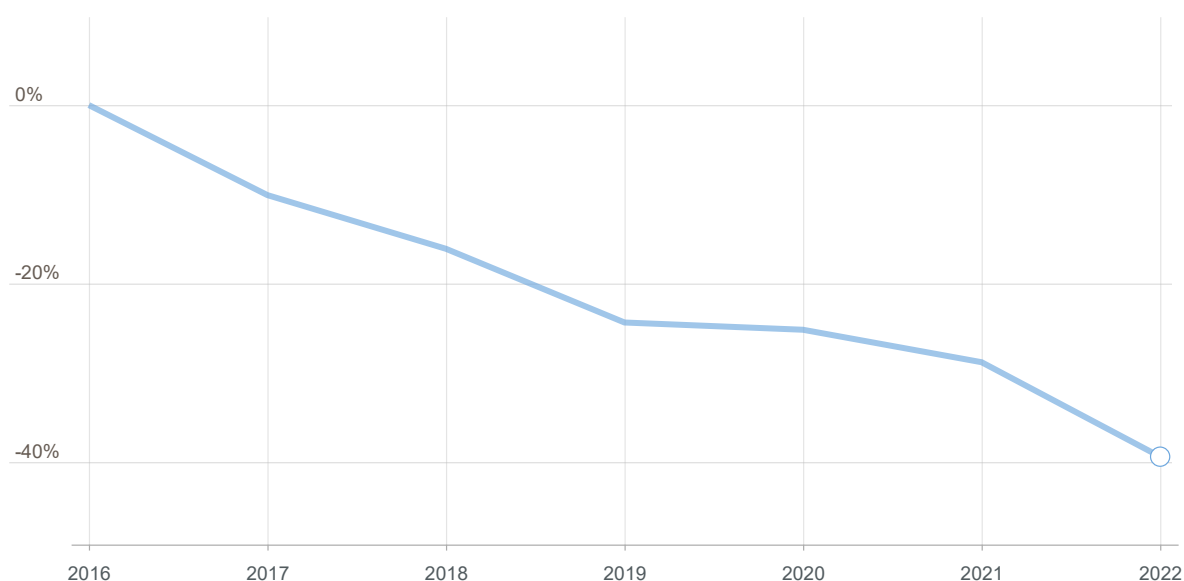
Source: TfL [‘Travel in London 2023’](#).

The number of people killed or seriously injured in or by a London bus declined from 413 to 135 from 2010 to 2020. However, since then, this figure has increased to 269 in 2022. Compared to the 2017-19 pre-pandemic average set by TfL, the number of people killed or seriously injured as a result of collisions involving buses increased by 14 per cent in 2022. These latest figures have been largely driven by bus passengers who suffered serious injuries, often from slips, trips and falls.

## Transport Accessibility and Affordability

**Figure 6: Physical accessibility of the network**

% reduction in relative additional journey time using the step-free network



Source: TfL [‘Travel in London 2023’](#).

Improving the accessibility of public transport is key to creating a fully inclusive network for all. People who are older or disabled or who are travelling with luggage or young children can sometimes find it hard to get around, and often face longer journeys if they are only able to use the step-free network.

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. Progress is measured by tracking the per cent reduction in relative additional journey time.

With the launch of the Elizabeth line and other improvements to the London Underground network, the relative additional journey time has reduced by 39 per cent in 2022 (compared to the 2016 baseline set by TfL).

### Figure 7: Transport affordability

Household expenditure on transport (financial year ending 2020 to financial year ending 2022), £ per week



Source: [Living Costs and Food Survey](#). Data based on a 3 year average.

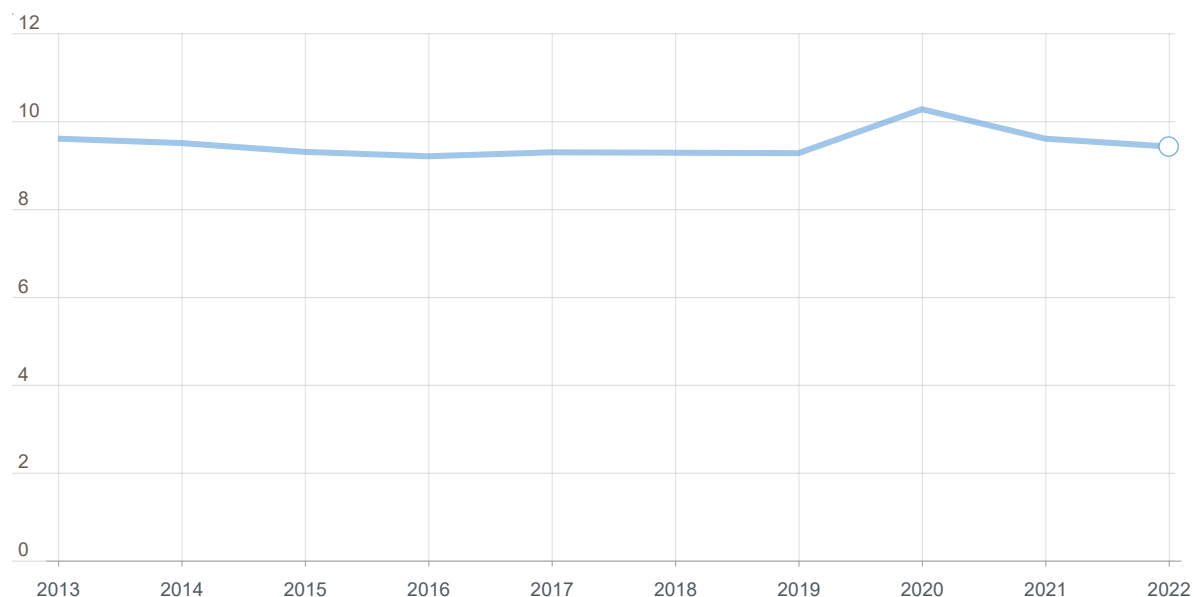
In 2022, Londoners spent £20 per week on public transport (compared to the £15 England average), the second highest region in the UK after the South East. Both London and the South East also had the highest proportion of household expenditure on public transport at 3.3% (which in part reflects residents' greater reliance on public transportation in these regions), exceeding the England average of 2.8%. This proportion fell in London from 4.1% in 2021, mirroring the overall trend in England.

Looking at a broader set of household transport costs, including ownership and maintenance of a car, Londoners spent less than their counterparts in other regions, with average expenditure of £65 per week compared to a national average of £73. They also had the lowest proportion of overall expenditure on transport at 10.5%, compared to the England-wide average of 13.5%. The East and East Midlands regions spent the most proportionally on transport. In London, the proportion decreased from 11.2% in 2021, while the England-wide figure remained relatively stable at 13.6% in 2021, driven by increased costs of owning and maintaining a car.

## Transport Quality

**Figure 8: Bus service performance**

Average Speed (mph)



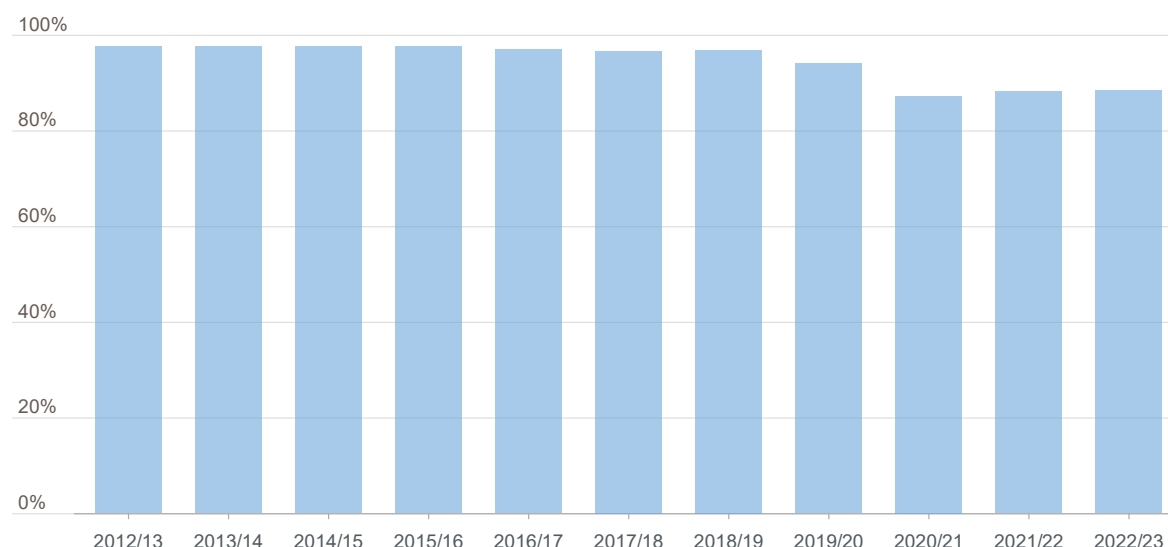
Source: TfL [‘Travel in London 2023’](#).

Bus speeds are a key indicator of perceived quality of service. Falling bus speeds can be caused by delays and incidents associated with street works, traffic congestion, staff shortages, and vehicle breakdowns among other factors. They are improved for example by giving buses priority through technology to optimise traffic signal cycles, infrastructure such as dedicated bus lanes, bus gates, or by operating limited-stop services.

In the years prior to the pandemic, bus speeds were relatively stable at around 9 mph on average. During the pandemic when the amount of traffic on the roads fell, bus speeds increased to reach a high of 10.3 mph in 2020. In 2021 and 2022, bus speeds declined to 9.6 mph and 9.4 mph respectively as traffic increased again. Bus speeds remain slightly higher than in 2019, perhaps reflecting a combination of the lasting impacts of restrictions, slightly reduced demand for car travel, and continuing investment in bus priority lanes.

### Figure 9: London Underground service performance

Proportion of km operated on underground services (%)



Source: TfL [‘Travel in London 2023’](#).

The above chart shows the proportion of kilometres operated on underground services compared to those scheduled, which acts as an indicator of underground performance. This metric improved in the first half of the decade before falling back, albeit still remaining at relatively high levels.

The pandemic started to have an impact on service provision in March 2020 (end of financial year 2019/20). On an annual basis, operated kilometres fell from 94% to 87% between 2019/20 and 2020/21 then increased to 88.2% in 2021/22. 2022/23 was, however, a particularly challenging one for operational performance, with a small net decline across most modes due to several factors, including long-running industrial action on public transport networks across the country as well as other staff- and asset-related causes. On the underground, the percentage of km operated increased slightly from 88.2% in 2021/22 to 88.3% in 2022/23.

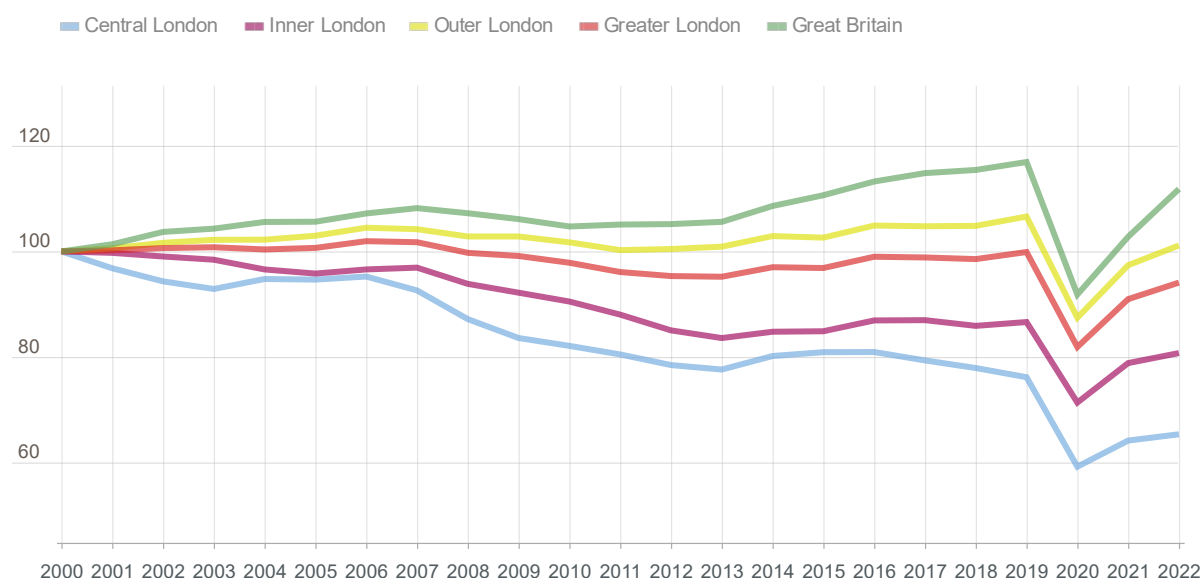
Although indicators of TfL-operated public transport show positive signs of recovery towards the pre-pandemic baseline, there remain some gaps in demand, service provision and performance against pre-pandemic norms.



## Transport Efficiency

**Figure 10: Road traffic statistics**

Change in vehicle kilometres driven by motorised modes, by London area and Great Britain, 2000-2022. Index: 2000=100.



Source: TfL [‘Travel in London 2023’](#).

The most comprehensive indicator of road traffic volumes in London is the above metric provided by the Department for Transport (DfT). The chart shows the long-term trend in vehicle kilometres driven by motorised modes in different parts of London, indexed to year 2000. The amount of traffic was relatively stable in London before falling during the pandemic. Travel volumes in 2022 had not yet returned to pre-pandemic levels, with total traffic in London being six per cent lower than in 2019.

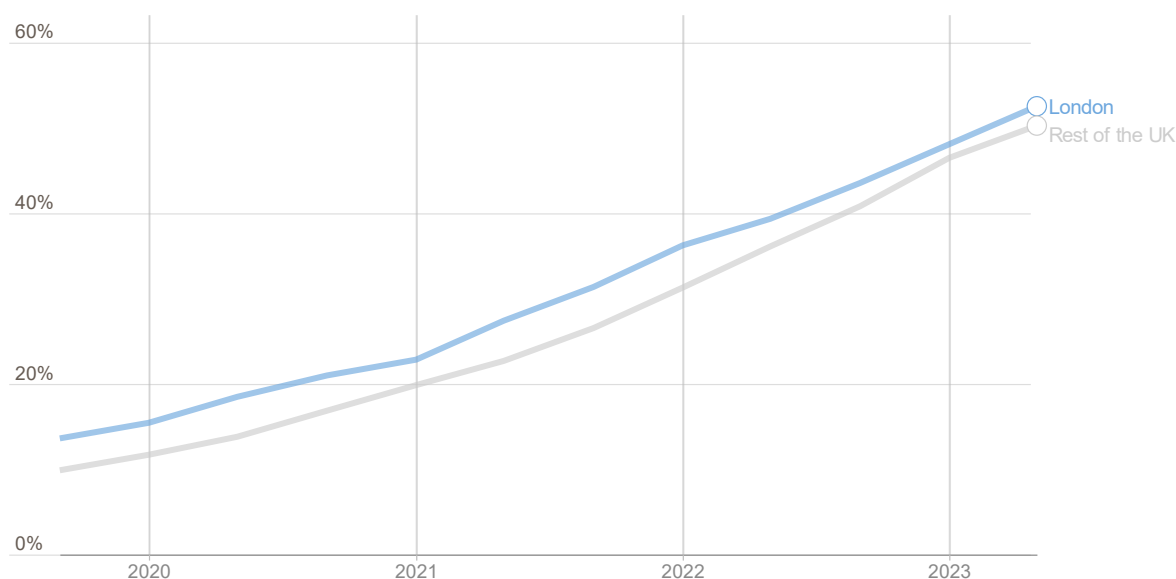
Of particular interest is the diverging trend in traffic growth between different areas of London. Traffic volumes in central London (using a definition different to, and larger than, the central London Congestion Charge zone) have fallen relatively consistently year on year, and in 2022 were 35 per cent below 2000 and 19 per cent below 2016 levels. Equivalent values were 19 and 7 per cent for inner London. Some of the reasons for this decline include the introduction of the congestion charge in the early 2000s, as well as improvement to the transport network.

Traffic volumes in outer London were one per cent higher than 2000 levels in 2022, reflecting a greater dependency on motorised travel and a tendency for traffic growth to reassert itself in outer London following the pandemic.

## Digital Infrastructure

**Figure 11: Full Fibre availability**

% of premises able to access full fibre



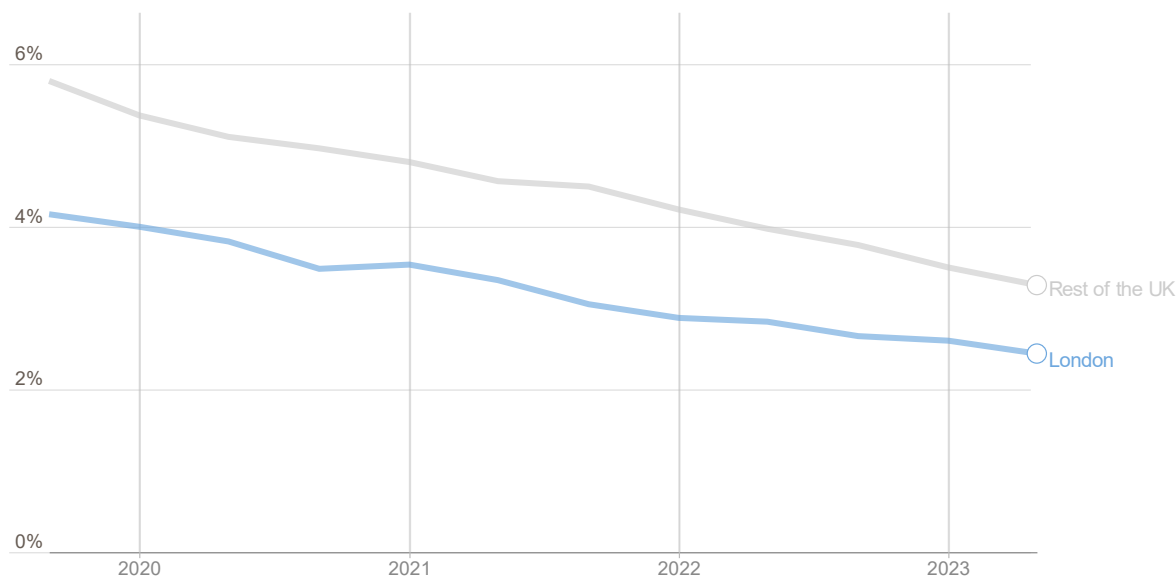
Source: [Ofcom](#)

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 copper cables to connect the cabinet to a property.

Full fibre broadband was available to 53% (or 2.1m) of premises (business and residential) in London as of May 2023, compared to 50% in the rest of the UK. Since January 2023, 180,000 more premises in London gained the ability to access full fibre, representing a 9% increase.

### Figure 12: Superfast broadband unavailability

% of premises unable to access superfast broadband (speeds >30Mbit/s)



Source: [Ofcom](#)

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 most households use multiple connected devices, 30Mbit/s is increasingly regarded as a minimum requirement.

In May 2023, 2.4% of London premises were unable to access internet speeds of 30Mbit/s or more, compared to 3.3% 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 network infrastructure continues to improve.

## 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.

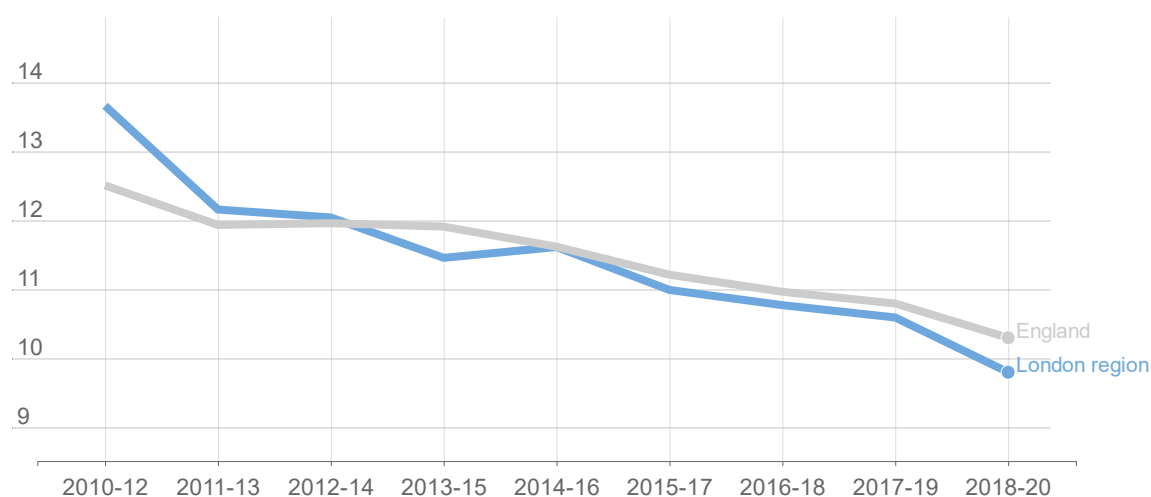
The majority of the indicators covered in this chapter are updated annually with the exception of two, which are updated quarterly: the number of early years providers and perceptions of safety for children and young people.

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



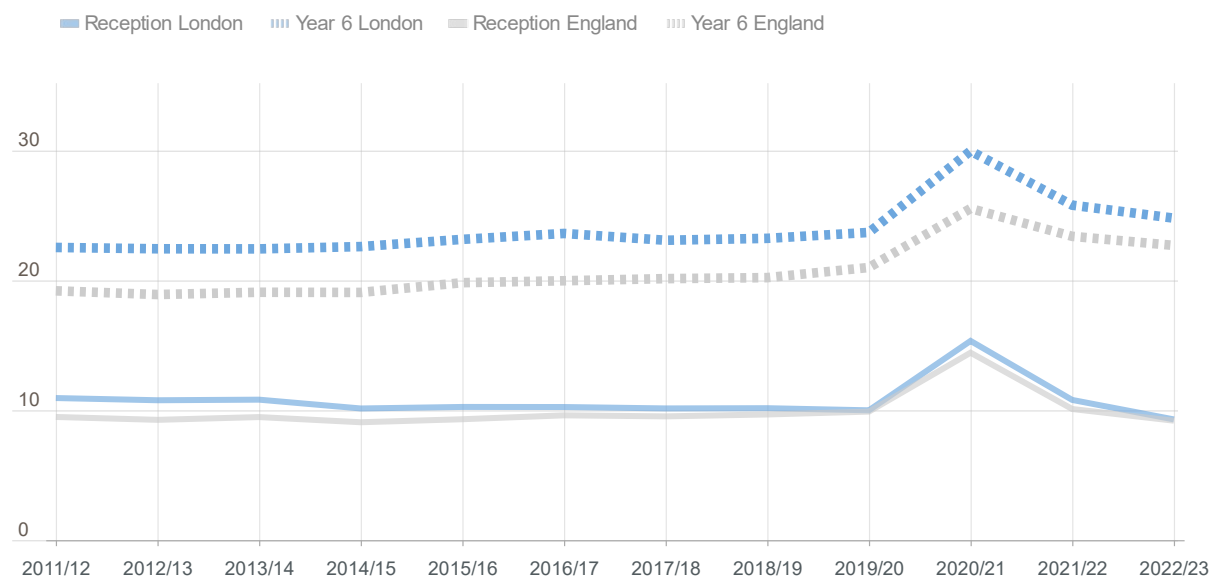
Source: [Office for National Statistics \(ONS\)](#)

The child mortality rate measures the rate of death due to all causes for persons aged 1-17 years. The latest data available is for 2018-20, and as presented in the previous version, it stood at 9.8 per 100,000 between 2018 and 2020 in London, compared to 10.3 in England.

London's rate decreased by 3.9 points since 2010-12, compared to 2.2 points for England.

### Figure 2: Prevalence of obesity

Proportion of children in reception and year 6 that are obese (including severe obesity)

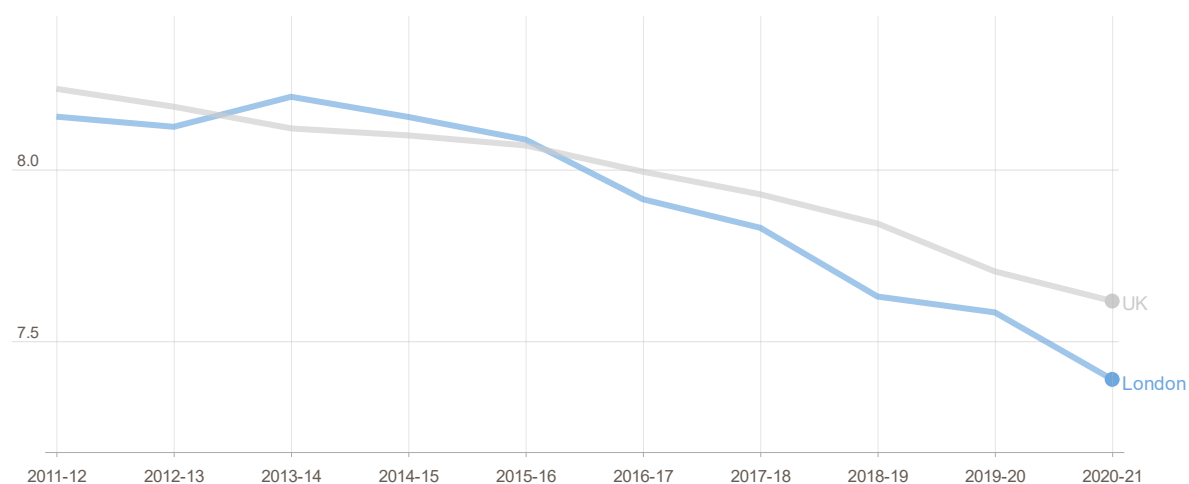


Source: [NHS Digital, National Child Measurement Programme](#)

As of 2022/23 (latest data available), about 10% of London’s reception children are classified as obese, similar to the percentage for England. This represents a noticeable drop from the 2020/21 rate (15%). The prevalence of obesity in year 6 during 2022/23 was higher in both London and England, with London’s rate remaining higher than England’s.

### 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

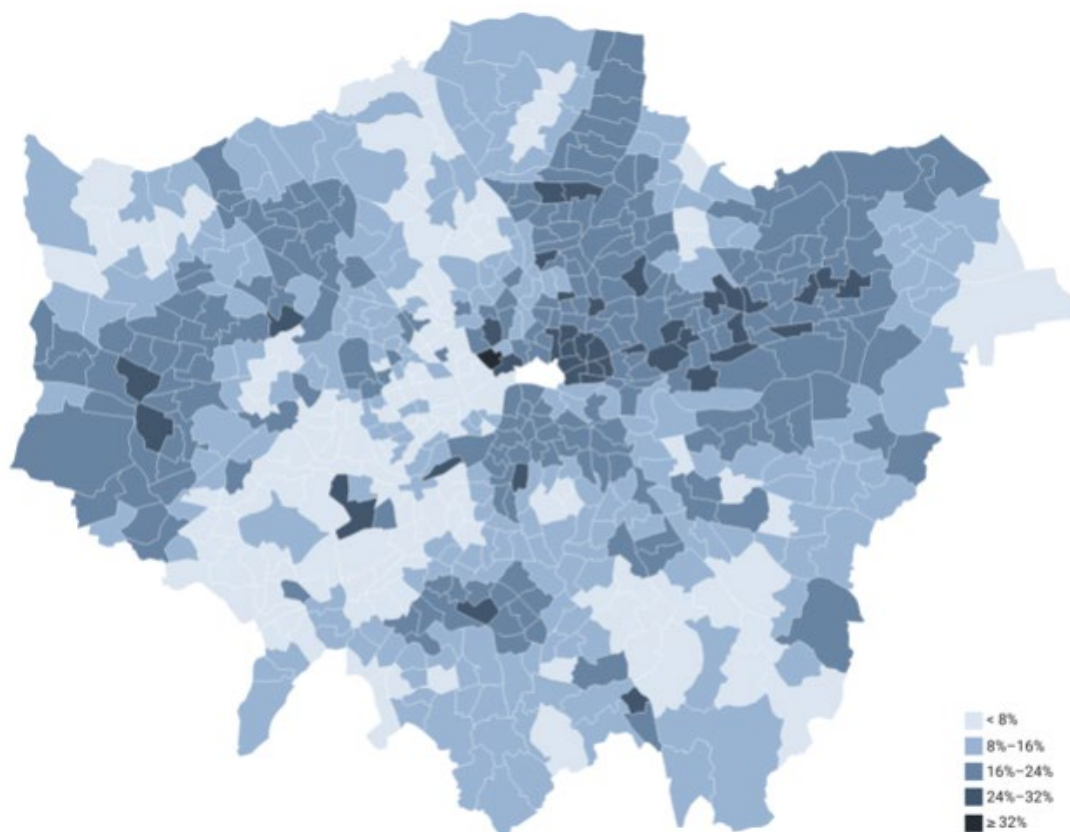


Source: [Understanding Society Survey](#)

As noted in the previous report, 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 trends, where scores have 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



Source: DWP Children in Low Income Families, 2021/22

Note: Rates are calculated as a percentage of ONS ward estimates of 0-15 age group for 2020, ward boundaries as at 2021

Map: GLA City Intelligence Unit • Source: ONS • Map data: © GLA

Source: Children in low-income families dataset, DWP, rates calculated as a percentage of GLA ward estimates of 0-15 age group

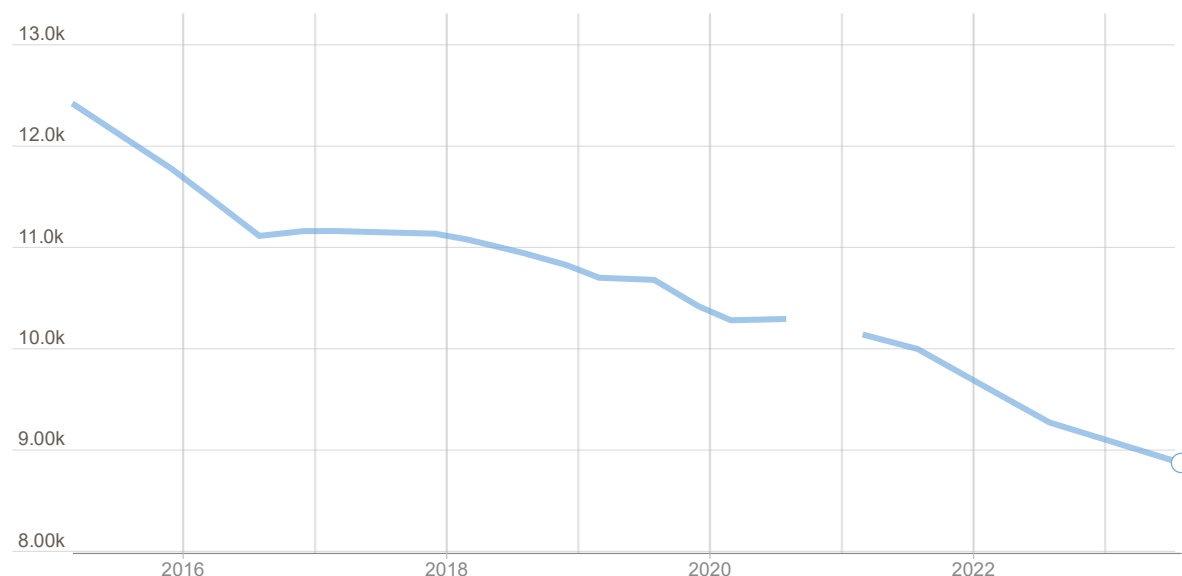
The percentage of children living in low-income families varies by ward and borough. The north east and west of London have a high concentration of children living in low-income families.

The latest available estimate shows 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<sup>59</sup>**

Number of registered early years providers across London in March and December between 2015 and 2023<sup>60</sup>



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.

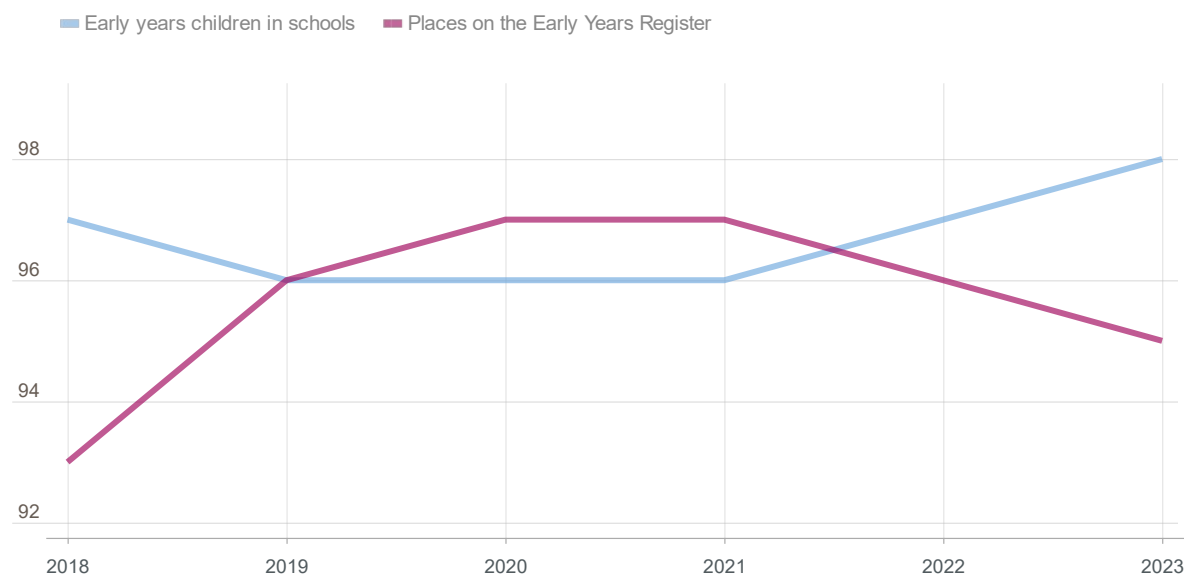
Between 2019 and 2022, there was an 11% decrease in the number of registered early years providers across London (from 10,695 to 9,569), compared to a 14% decrease across England (from 61,652 to 53,193). In 2023, the number of EYR providers in England fell by 9.4% compared to 2022 (to 48,143). For London, it fell by 7.3% (to 8,867).

<sup>59</sup> 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.

<sup>60</sup> 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 2023



Source: [Department for Education, Ofsted state-funded schools statistics](#) and [Ofsted early years and childcare statistics](#)

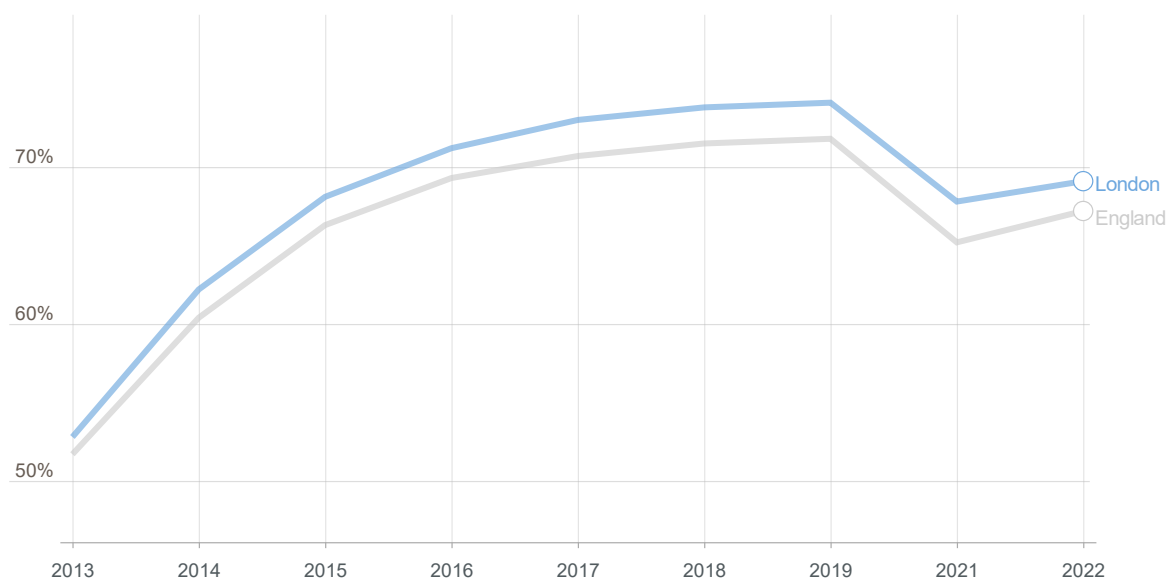
2023 data shows that 98% of early years children in schools attend a setting which is 'good' or 'outstanding'<sup>61</sup>. 95% of places on the Early Years Register are in 'good' or 'outstanding' settings – an increase of 2 percentage points since 2018. The proportion of places in London that are in 'good' or 'outstanding' settings is similar to the rest of England (2023, 96%).

<sup>61</sup> Inspectors use a [four-point scale](#) to make judgements: outstanding, good, requires improvement and inadequate.



### Figure 7: Good level of development at age five

Percentage of children with a good level of development at age five between 2013 and 2022



Source: [Department for Education](#)

Note: No data available for 2020

The most recent data shows that the percentage of children in London with a good level of development at age five increased from 53% to 69% between 2013 and 2022. This compares to an increase from 52% to 67% in England over the same period. Meanwhile, children eligible for free school meals (FSM) are less likely to have a good level of development at age 5 (57.8%) than those ineligible (72.8%). Levels of development have increased for all children irrespective of FSM eligibility.

**Table 1: Percentage of black and Chinese children in London with a good level of development at age five by year**

|                   | 2013      | 2014      | 2015      | 2016      | 2017      | 2018       | 2019       | 2022       | 2023       |
|-------------------|-----------|-----------|-----------|-----------|-----------|------------|------------|------------|------------|
| Black children    | 53%       | 61%       | 67%       | 70%       | 71%       | 72%        | 70%        | 62%        | 63%        |
| Chinese children  | 54%       | 65%       | 73%       | 76%       | 80%       | 84%        | 82%        | 80%        | 79%        |
| <b>Difference</b> | <b>1%</b> | <b>4%</b> | <b>6%</b> | <b>6%</b> | <b>9%</b> | <b>12%</b> | <b>12%</b> | <b>18%</b> | <b>16%</b> |

Black children are less likely to have a good level of development at age 5 (63% in 2023) compared to other ethnic groups. The attainment gap between Chinese children (who have the highest achievement) and black children increased by 15 percentage points since 2013<sup>62</sup>.

<sup>62</sup> 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.

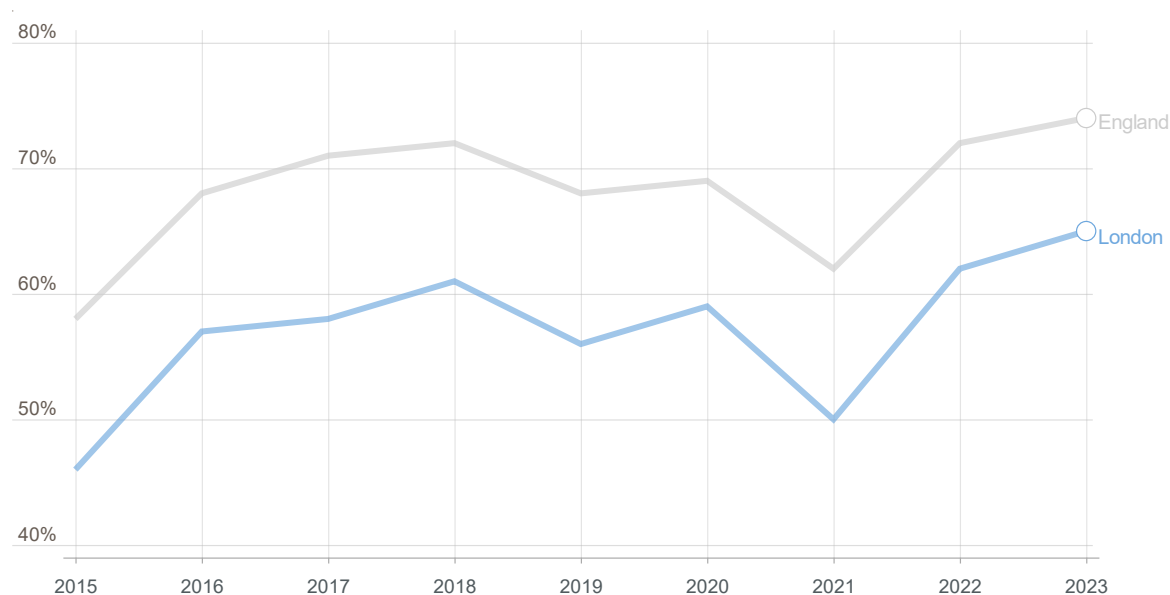
Students from Irish traveller heritage and Gypsy/Roma backgrounds were significantly under-performing – only 41.4% and 44.5% achieved a good level of development, respectively.

In 2023, 69% of London’s children had a good level of development at age 5. Girls were more likely to have that (76%) than boys (63%), while White children were more likely to have that level of development (72%) than Black children (63%). For minority ethnic groups, the biggest gap was between Chinese (79%) and Travellers of Irish heritage (41%).

In 2023, children who are FSM-eligible are less likely to have a good level of development at age 5 than those ineligible (58%, compared to 73%).

### 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 2023



Source: [Department for Education](#)

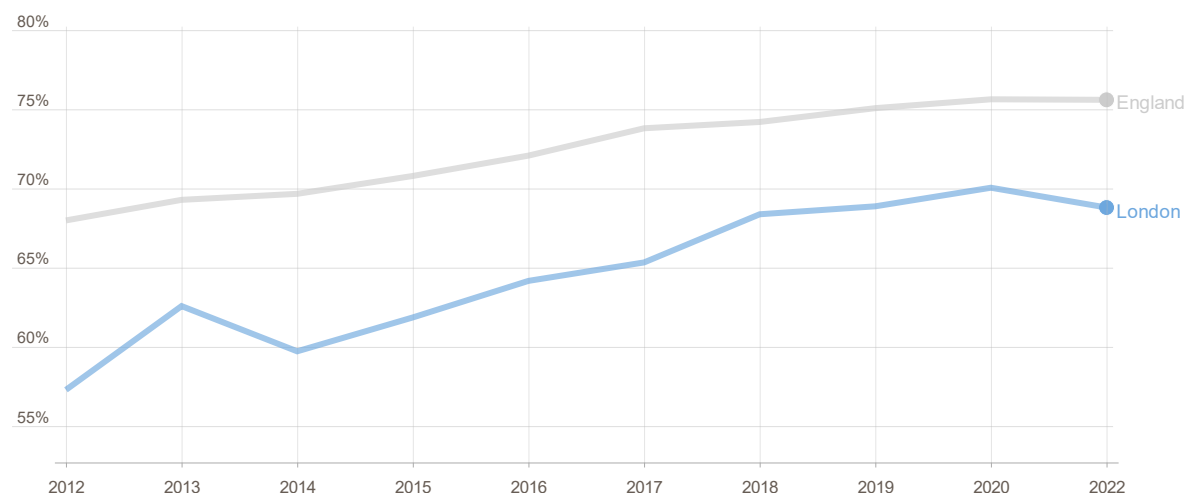
In 2023, a majority of eligible two-year-olds in London (65%) used at least part of their Free Early Education Entitlement (FEEE)<sup>63</sup>. This compares to 74% for England.

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 and a smaller rise between 2022 and 2023.

<sup>63</sup> 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>

### 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](#)

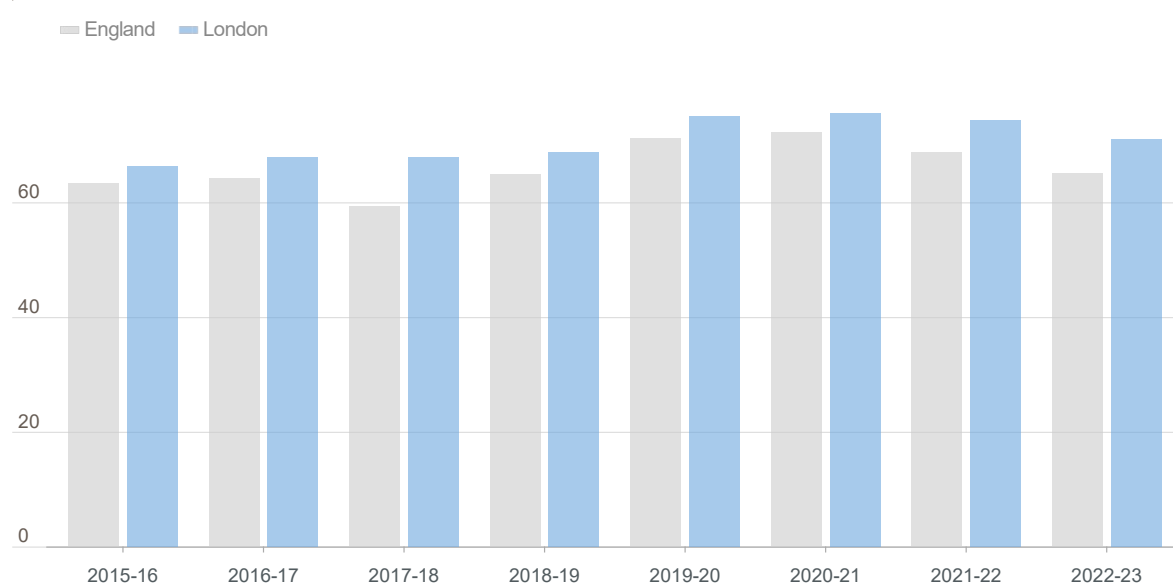
Note: No data available for 2021

69% of mothers with dependent children in London are in paid work, compared to 76% across England. In London, it increased by 12 percentage points between 2012 and 2020. However, since 2020, the rates have dropped for London while staying virtually the same for England.

## 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 2022-23



Source: [Department for Education](#)

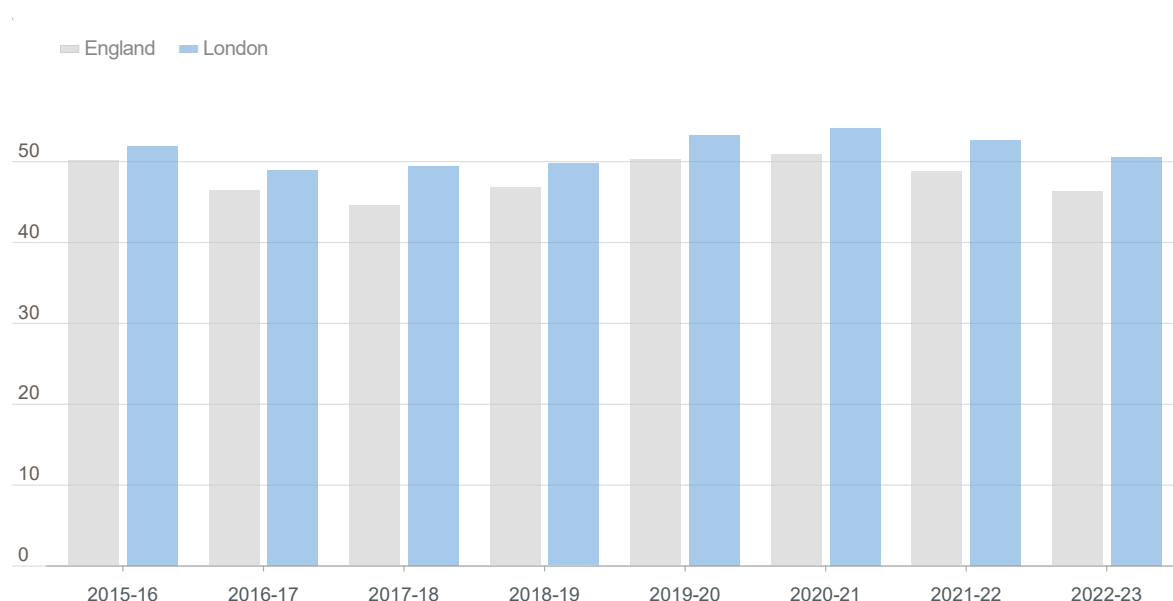
London has a higher percentage of pupils achieving a standard 9-4 pass<sup>64</sup> in English and Mathematics compared to England. In 2022-23, that percentage stood at 71% in London, compared to 65% in England.

80% of London’s Asian pupils achieved a standard pass in 2022-23, compared to 65% of Black Londoners, 68% of Mixed Londoners, 70% of White Londoners and 70% of Other Londoners.

Meanwhile, only 16% of pupils with SEN state EHC plans achieved a standard pass in 2022-23 (compared to 17% in 2021-22). For pupils with no SEN, 78% of pupils achieved a standard pass (compared to 81% in 2021-22).

**Figure 11: Average Attainment 8 score**

The average Attainment 8 score per pupil in London and England between 2015-16 and 2022-23



Source: [Department for Education](#)

Note: provisional data not comparable with 2019-20 or 2020-21. Data for 2022-23 also provisional.

Provisional data for 2022-23 shows that the average Attainment 8 score decreased from 2015-16 levels by 1.4 percentage points to 50.5. For England, it fell by 2.7 percentage points over the same period, to 46.3.

In 2022-23, London’s Black pupils had the lowest average Attainment 8 score (46.4), compared to 56.5 for Asians (the highest score). The gap in the average Attainment 8 score between FSM-eligible pupils and those ineligible increased from 8.8 points in 2015-16 to 12.1 points in 2022-23.

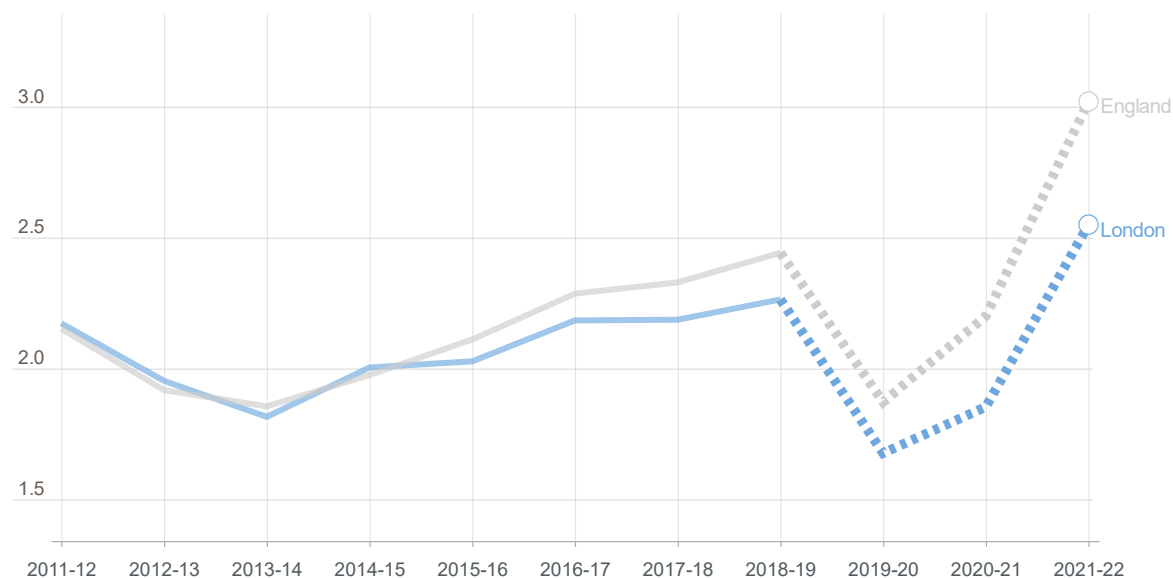
For the same school year, pupils with no identified SEN had an average Attainment 8 score of 54.4, compared to 16.3 for pupils with SEN and a statement or EHC plan. This compares to 50.1 and 14.0 respectively for England pupils.

<sup>64</sup> 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).

In 2022-23, across all characteristics (e.g., ethnicity, FSM status), children in London performed better than their counterparts across the country, except for black pupils.

### Figure 12: Fixed-term exclusion rate

The fixed-term exclusion rate<sup>65</sup> for pupils with at least one fixed term exclusion in the academic year in London and England between 2011-12 and 2021-22



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 1.85 in 2020-21 to 2.55 in 2021-22. This compares to an increase from 2.20 to 3.02 for England.

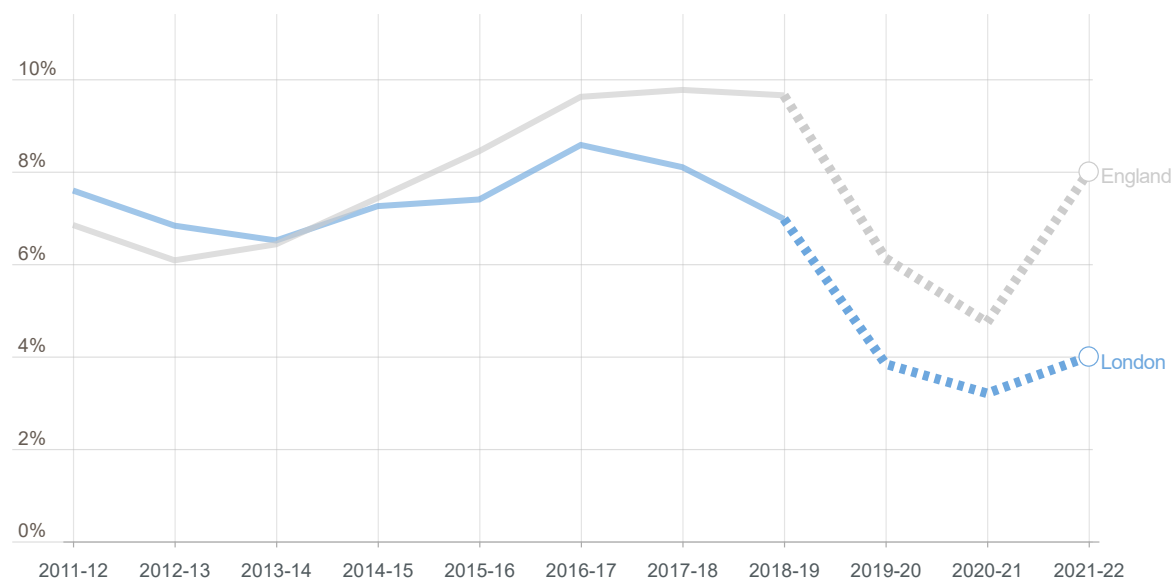
Black students continued to experience a higher FTE rate (4.23) than other groups in 2021-22; this rate compares to 1.21 for Asian students, 2.79 for White students and 3.15 for Mixed students.

FSM-eligible pupils experienced a higher FTE rate (4.46) than non-eligible pupils (1.88), and SEN pupils with statement or EHC plan had a higher rate (5.5) than those without SEN (1.99). Meanwhile, pupils with Special Educational Needs (SEN) had a higher FTE rate (5.3) than those without SEN (1.8).

<sup>65</sup> 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<sup>66</sup> across all schools in London and England between 2011-12 and 2021-22



Source: [Department for Education](#)

Between 2016-17 and 2021-22, the permanent exclusion rate (PER) in London decreased from 0.09 to 0.04. Over the same time period, England's PER decreased by a lesser extent (from 0.10 to 0.08).

In 2021-22, FSM-eligible pupils experienced a higher PER (0.09) than non-eligible pupils (0.02).

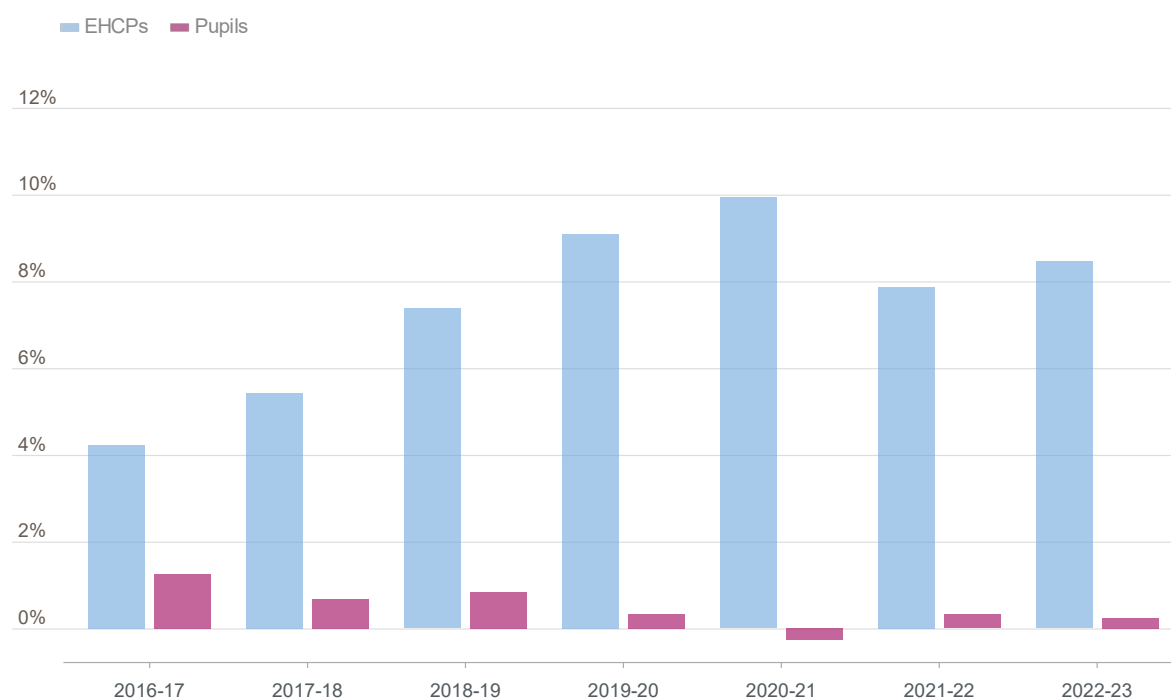
Black pupils experienced the highest rate of exclusion (0.068) compared to 0.017 for Asian students, 0.065 for Mixed students and 0.033 for White students. Meanwhile, SEN pupils with statement or EHC have a higher PER (0.041) than pupils without SEN (0.03).

<sup>66</sup> 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 2022-23



Source: [Department for Education](#)

The number of pupils in London with an Education, Health and Care (EHC) plan or statement of SEN<sup>67</sup> increased by 8.5% between 2021-22 and 2022-23, while the pupil population increased by 0.2%.

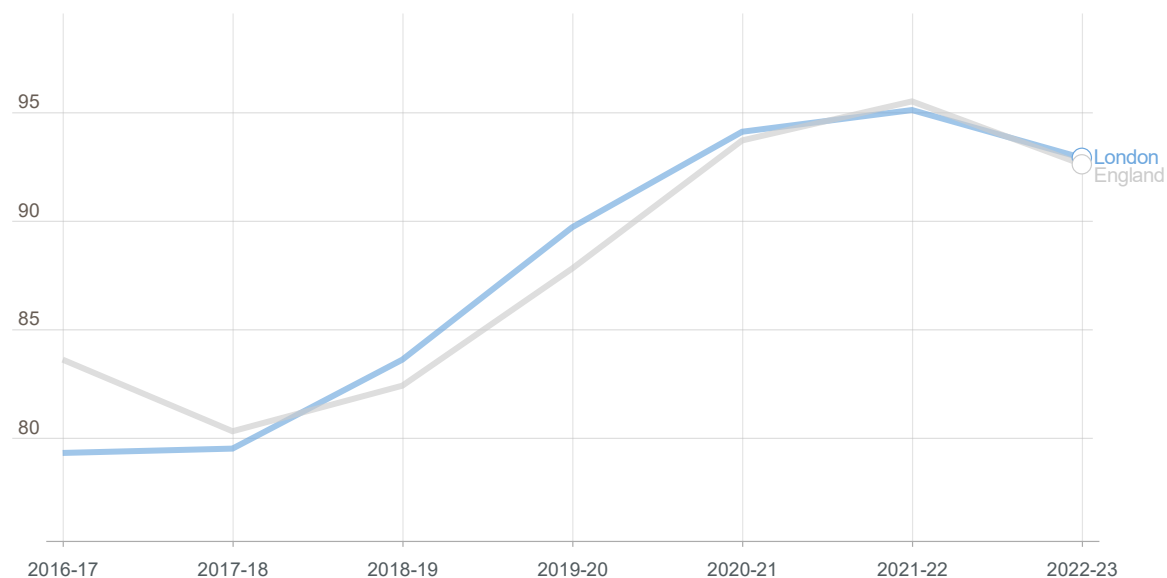
Between 2020-21 and 2021-22, the number of state-funded primary school pupils with an EHC plan or statement of SEN increased by 9.9%, while the pupil population decreased by 1.0%.

<sup>67</sup> 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 2022-23



Source: [Department for Education](#)

92.9% of pupils across London achieved at least two substantial level-3 qualifications<sup>12</sup> in 2022-23, broadly in line with the England average (92.6%). This is a decrease from the 2021-22 percentage (95.1%).

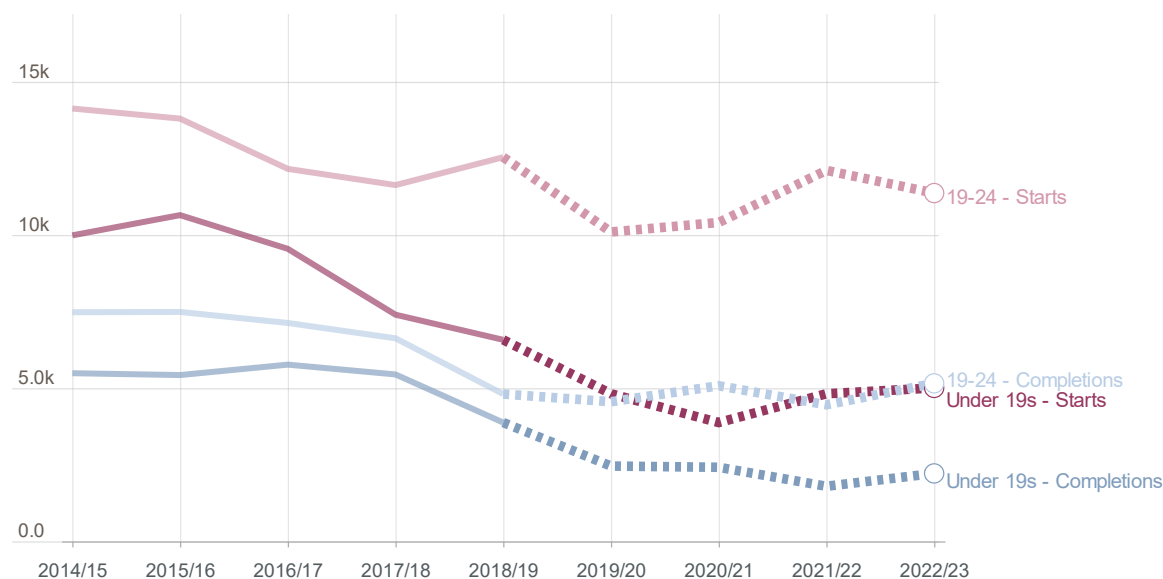
In comparison to 2017-18, the number of pupils attaining at least two substantial level-3 qualifications increased by 13.4 percentage points in London and by 12.3 percentage points in England over the same period.

In 2022-23, 88% of pupils with an EHC plan and statement of SEN attained this (versus 72.5% in 2018-19). 94.1% of pupils with no identified SEN realised this level (versus 84.9% in 2018-19).



### 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 2022/23<sup>68</sup>



Source: [Department for Education](#)

In 2022/23, the number of Londoners under-19 starting an apprenticeship programme was 5,010, a 4% increase from the previous year. Between 2014/15 and 2022/23, this number decreased by 50%. Over the same period, the number of 19-to-24-year-olds starting an apprenticeship fell by 20%.

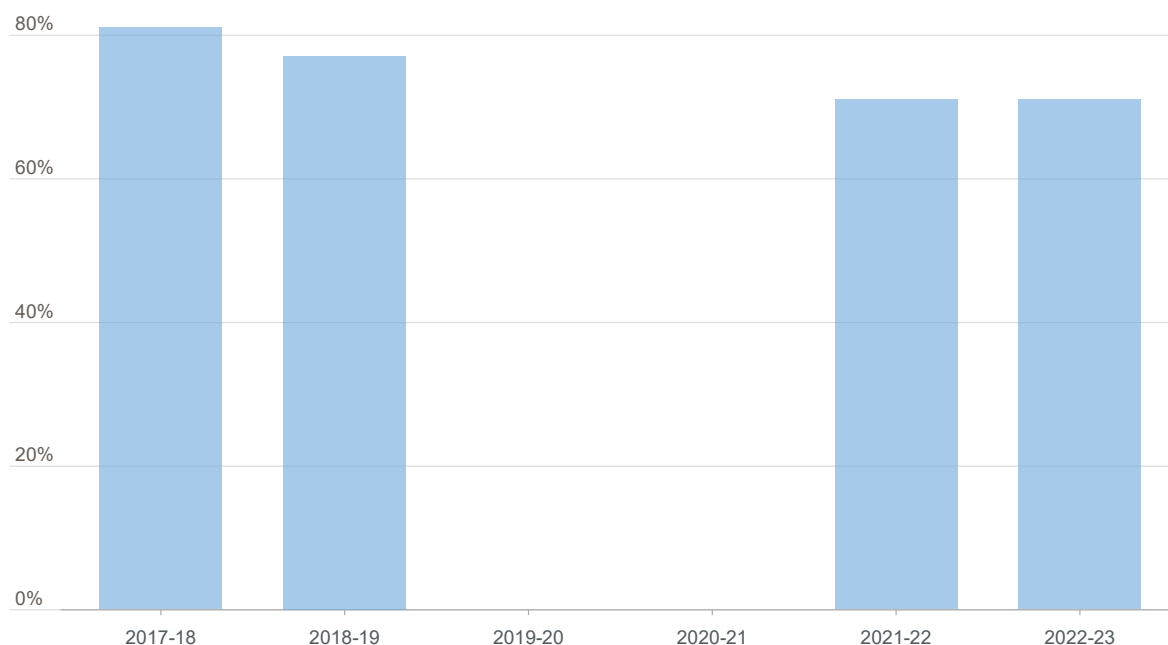
However, since 2021/22, there has been an increase in Londoners aged under-19 starting an apprenticeship, and in completions by both under- 19s and 19-24-year-olds. Nevertheless, the number of 19-to-24-year-olds starting an apprenticeship decreased over this period by nearly 6% (from 12,110 to 11,370).

<sup>68</sup> 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 2022-23<sup>69</sup>



Source: [Public Attitudes Survey, MOPAC](#)

In the 12 months between October 2022 and September 2023, 71% of Londoners agreed that their local area was a safe place for children and young people to grow up, compared to 81% of Londoners in 2017-18. Males were more likely to agree (72%) than females (66%).

Londoners aged 65+ were most likely to agree, while those aged 35 to 44 were least likely to agree. Looking at trends by ethnicity, Londoners from Mixed ethnic backgrounds were least likely to agree (65%). This compares to 69% of White Other, 74% of White British, 70% of Asian, 71% of Black and 71% of Other ethnicities.

<sup>69</sup> 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, unfair and systematic differences in outcomes between different groups of people<sup>70</sup>. These differences in health status are typically presented over four factors: socio-economic (e.g., education and income), geography (urban vs rural, area deprivation), specific characteristics including those protected by law (e.g., ethnicity or disability) and socially excluded groups (e.g., people experiencing homelessness).

The fundamental causes of health inequalities include wider determinants which relate to where we grow, live, work and age, and they ultimately determine our opportunities for good health. Inequalities within those wider determinants are dealt with in 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 and morbidity in London. They 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 chapter contains material which is covered in greater depth in the Office for Health Improvement & Disparities ([OHID Health Profile for London Report](#)) and the [Snapshot of Health Inequalities in London Report](#).

### Life Expectancy, Mortality and Inequalities

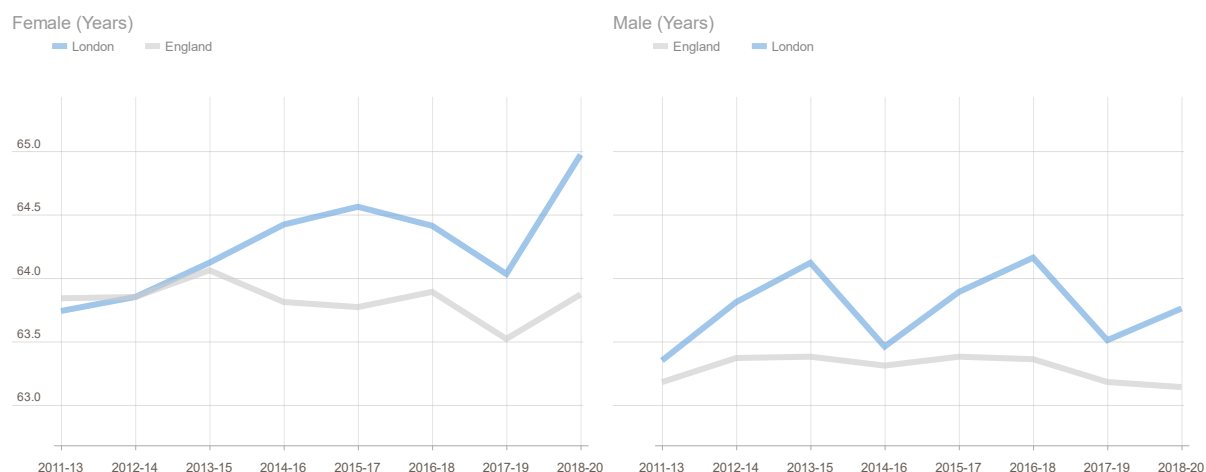
Healthy life expectancy (HLE, an estimate of lifetime spent in "Very good" or "Good" health based on how individuals perceive it) is a key summary measure of population health. London values remain higher than the national average for both males and females, as shown in Figure 1. At 65.0 years, the female HLE for London is slightly higher than the male HLE (63.8 years).

These values mask persistent and significant variation in HLE between and within 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.

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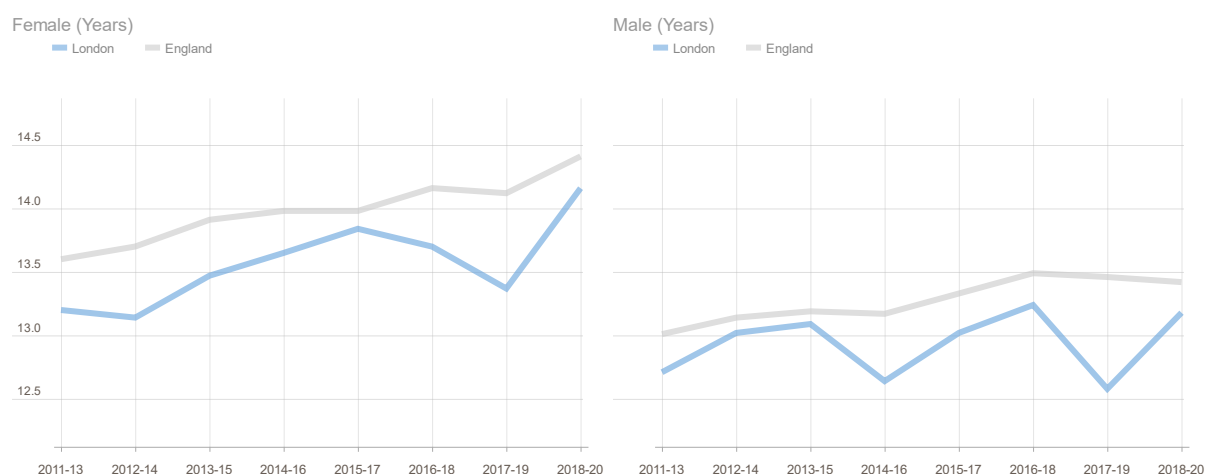
<sup>70</sup> What are health inequalities? | The King's Fund ([kingsfund.org.uk](https://www.kingsfund.org.uk))

**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 HLE values of adults aged 60 – 64 years (14.2 years for women and 13.2 for men), the advantage of living in London is overturned, as shown in Figure 2. London’s lower than national average values could be 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<sup>71</sup>

<sup>71</sup> [Mortality and migration in Britain, first results from the British Household Panel Survey - ScienceDirect](#)

### 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

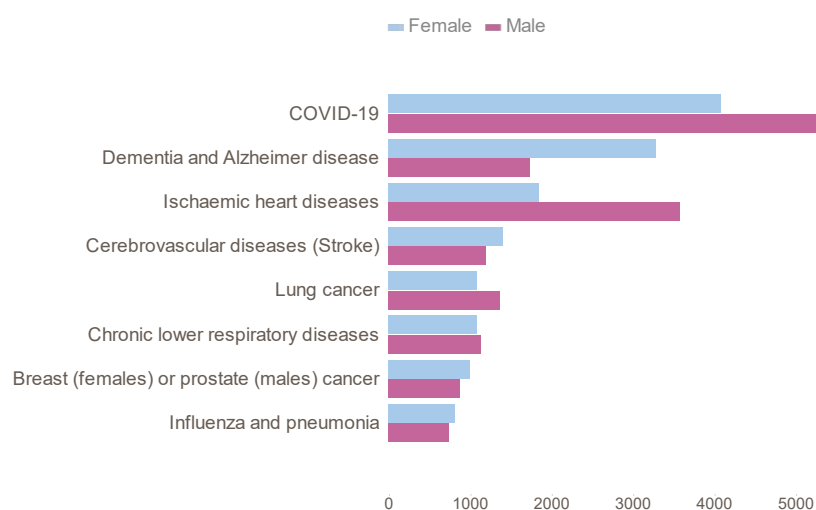


Source: [OHID Health Profile for London Report](#)

The all-cause mortality rate for people aged below 75 years (often termed “premature mortality”) is highly associated with deprivation, as shown in Figure 3. This data comes from the OHID Health Profile for London, which has not been updated since its most recent 2021 version. Nevertheless, the figure shows that socio-economic inequality in mortality rates is high, having increased between 2019 and 2021 because the populations living in the most deprived deciles experienced higher mortality compared to the least deprived deciles during the pandemic. In 2021, the rate for the most deprived decile was nearly 3.3 times the rate for the least deprived (614 compared to 187), while in 2019 the ratio between the two mortality rates was lower, at 2.9 (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 had the 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<sup>72</sup>. 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. This would suggest that as relative mortality from COVID-19 decreases, chronic disease and conditions associated with older age will contribute to greater proportions of deaths. Moreover, 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 \(OHID\)](#).

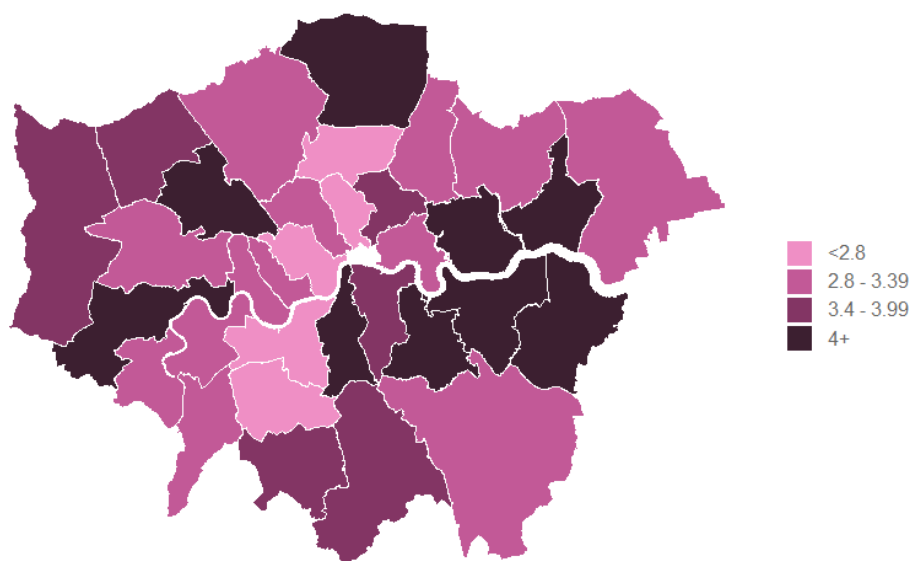
Except for the two recent years affected by COVID-19, since 2001, IHD has consistently been the leading cause of death for males in London and in England, even as IHD mortality rates decline. Cerebrovascular diseases, chronic lower respiratory diseases and cancer mortality have also declined, whereas rates for deaths resulting from dementia and Alzheimer disease have steadily increased over this period. However, direct comparisons between mortality rates 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 have been the main cause of deaths that might otherwise have been attributed to other conditions (e.g., chronic disease) if the pandemic had not occurred, as having a chronic disease increases the risk of death from COVID-19. For females, dementia and Alzheimer disease overtook IHD as the leading cause of death in 2012, and remained as such until the pandemic.

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<sup>72</sup> OHID Excess Mortality in England Dashboard (Microsoft Power BI)

### 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 reflect 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

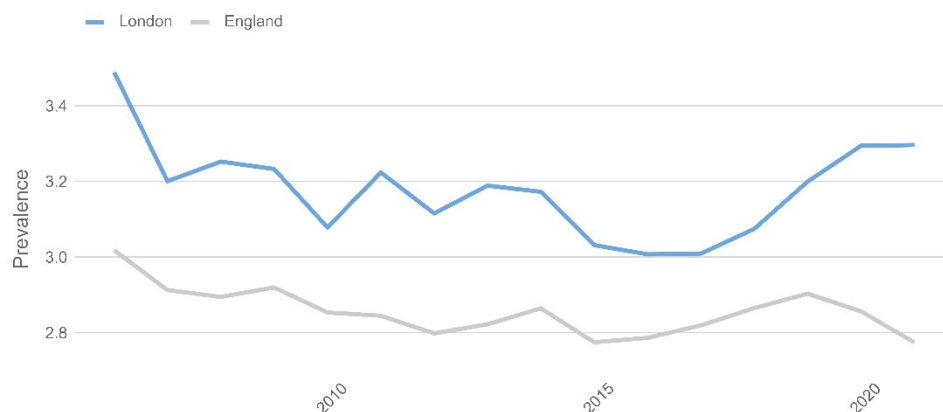
Low birth weight (LBW) among infants is an outcome of factors including maternal malnutrition, maternal ill-health and poor healthcare in pregnancy. The overall London values are higher than the national average as shown in Figure 6. The LBW rate has been gradually increasing in London since 2017. Given the strong correlation between risk of LBW and poverty<sup>73</sup>, the increasing rate in London could be related to the cost-of-living crisis and increased levels of socioeconomic deprivation. There is also evidence that suggests air pollution contributes to adverse impacts on foetal growth<sup>74</sup>.

<sup>73</sup> <https://bmjopen.bmj.com/content/bmjopen/11/3/e042753.full.pdf>

<sup>74</sup> [Impact of London's road traffic air and noise pollution on birth weight: retrospective population based cohort study | The BMJ](#)

### Figure 6: Prevalence of Low Birth Weight in London, 2006 - 2021

Percentage of all live births with gestational age of 37+ weeks, with a birth weight of <2.5 kg

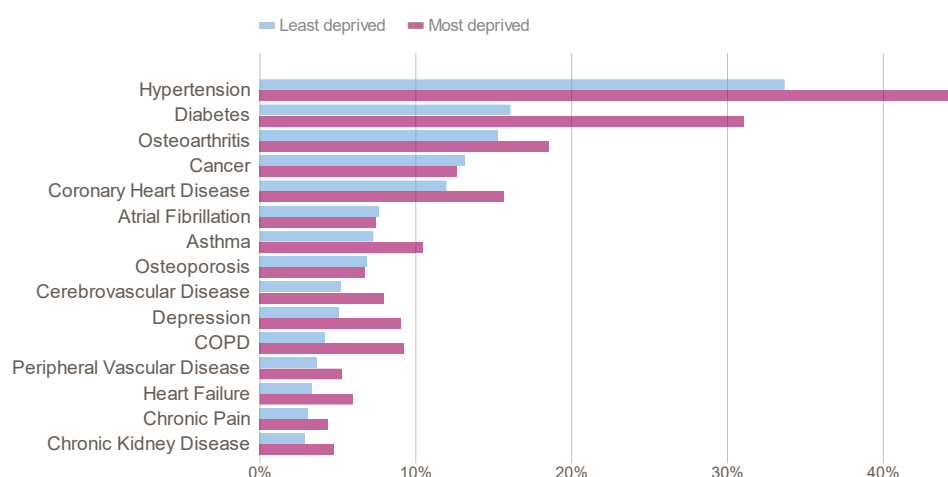


Source: [Public health profiles - OHID \(phe.org.uk\)](https://publichealthprofiles.org.uk)

Another 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 (1482), Headache disorders (1018), Gynaecological diseases (953) and Depressive disorders (934), and for males were Low back pain (1056), Diabetes mellitus, (837) Depressive disorders (692) and Alcohol use disorders (542) (all values are for age-standardised YLDs per 100,000 population).

### Figure 7: 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](#)

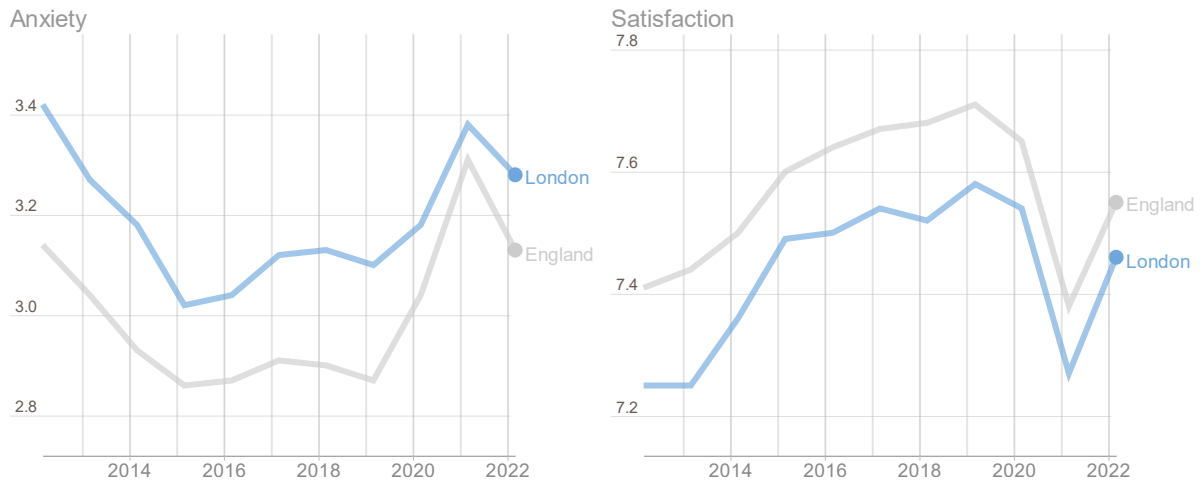
There is wide variation in rates of common diseases in London according to level of deprivation. Figure 7 shows how for older adults, prevalence rates of common diseases are much higher in the most deprived quintiles compared to least deprived, especially for diabetes (93% higher), lung disease (121% higher) and depression



(78% higher). This difference is also linked to the ethnic variation in prevalence of common diseases. For example, there is a much higher prevalence of hypertension in Asian (57%) and Black (56%) ethnic groups compared to White (42%) for the age group 65 – 84 years in London. For diabetes, again there is a much higher prevalence in Asian (49%) and Black (40%) ethnic groups than White (19%).

**Figure 8: Anxiety and life satisfaction for adults in London, 2011-12 to 2021-22**

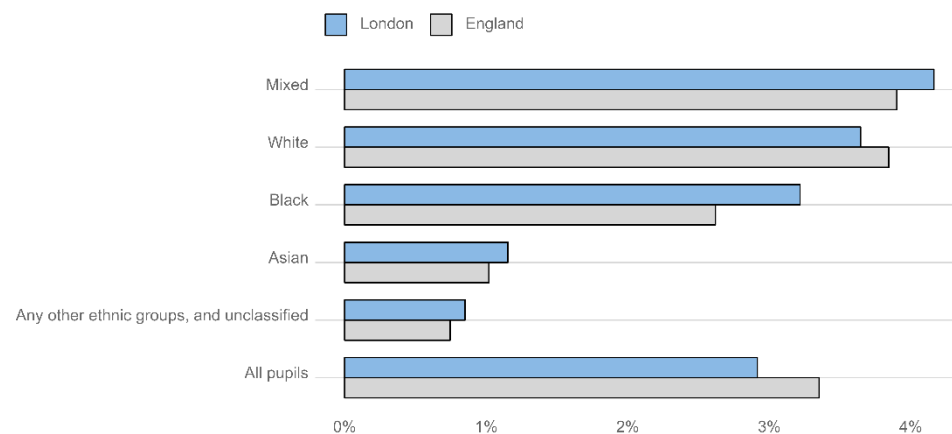
Mean responses on a scale from 0-10 to “Overall, how anxious did you feel yesterday”, and "Overall, how satisfied are you with your life nowadays?"



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

Figure 8 shows that indices of wellbeing continue to have lower values in London than the national average. The figure also shows how after steep improvements in values at the start of this decade, anxiety levels continue to rise since the pandemic, while life satisfaction in London continues to drop. Values for the year ending March 2022 recovered somewhat, but have not yet reached their pre-pandemic values. National data show that those of black ethnicity, those classifying themselves as disabled and the unemployed scored highest for low satisfaction scores.

**Figure 9: Percentage of school pupils categorised by ethnicity, with social, emotional and mental health needs, in London and England (2022/23)**



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 9 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.

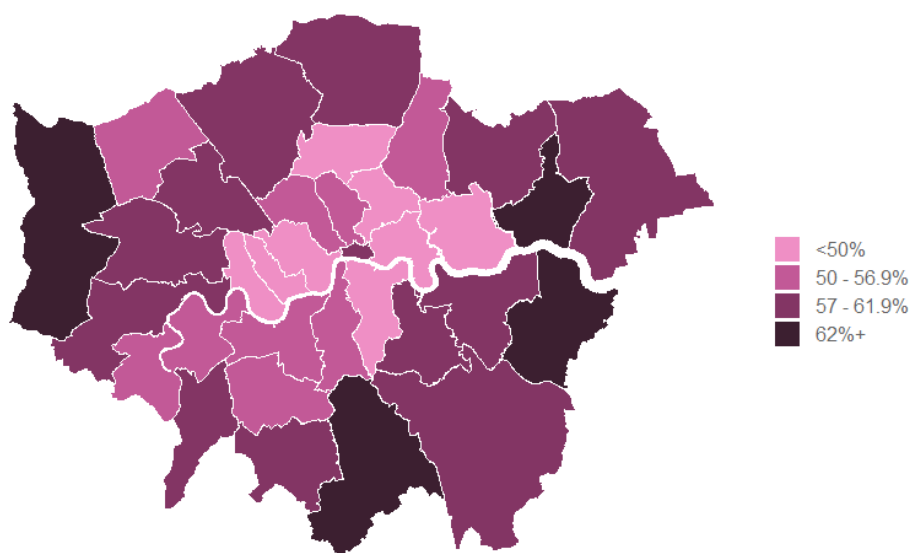
The figure shows that within London (and the whole of England), those of Asian and other ethnicity are under-represented in the SEMH group compared to the overall pupil group. A comparison of proportions of each ethnic group with SEMH needs in England with their equivalents for London indicates that school children of Black ethnicity are at higher risk of having mental health difficulties in London compared to rest of the country (3.2% in London and 2.6% in England).

## 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 are described in other 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 10: 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<sup>2</sup>



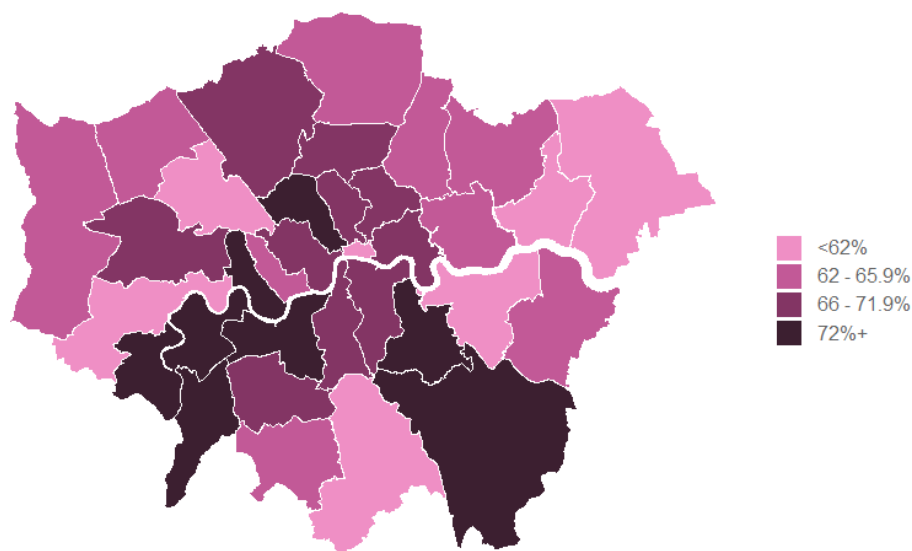
Source: [OHID Public Health Outcomes Framework](#) (based on Active Lives Adult Survey, Sport England)

Across London in 2021/22, more than half (56%) of adults were overweight or obese. The rate has been this high since 2015/16 but has been consistently lower than the

national rate. While local disaggregated data are unavailable, one could expect demographic variation in London 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. Figure 10 shows that the highest rates are concentrated in the Outer London boroughs, with Barking and Dagenham having the highest percentage (70%) and Southwark the lowest (44%).

**Figure 11: 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

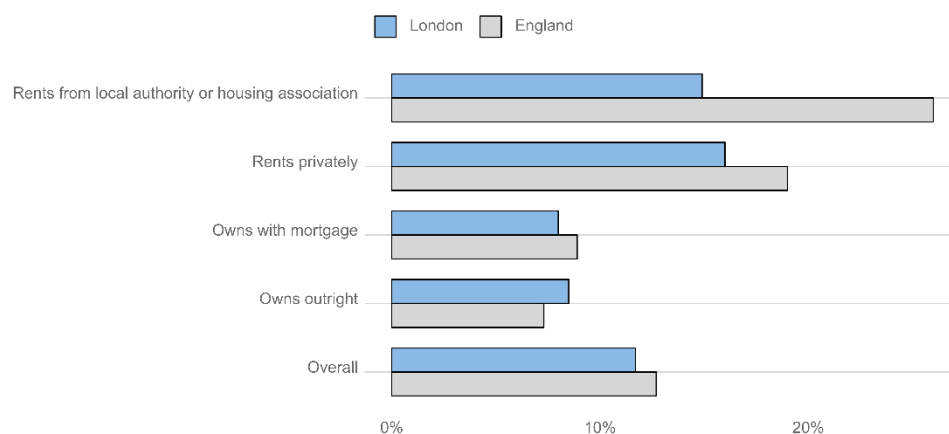


Source: [OHID Public Health Outcomes Framework](#) (based on the Active Lives Adult Survey, Sport England)

Figure 11 shows that the boroughs with highest proportions of adults reporting the recommended level of physical activity are Lewisham, Wandsworth, and Hammersmith and Fulham, at 74%.

**Figure 12: Smoking prevalence in adults in London by housing tenure (2022)**

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 those with routine and manual occupations. Figure 12 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 that for England.

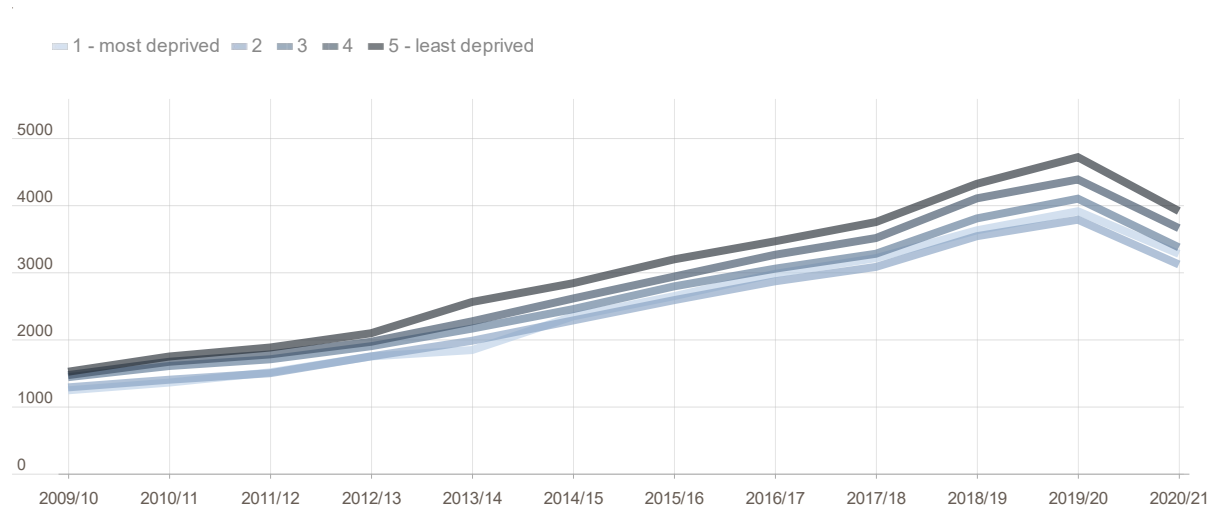
For alcohol consumption, the values for London in 2021/22 derived by [OHID from Hospital Episode Statistics](#) (age-standardised rate per 100,000 of 910 for males and 296 for females) expose the difference between the genders in the impact of alcohol on their health.

## Healthcare Inequalities

Differences in quality, access to, 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<sup>75</sup>.

**Figure 13: 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](#)

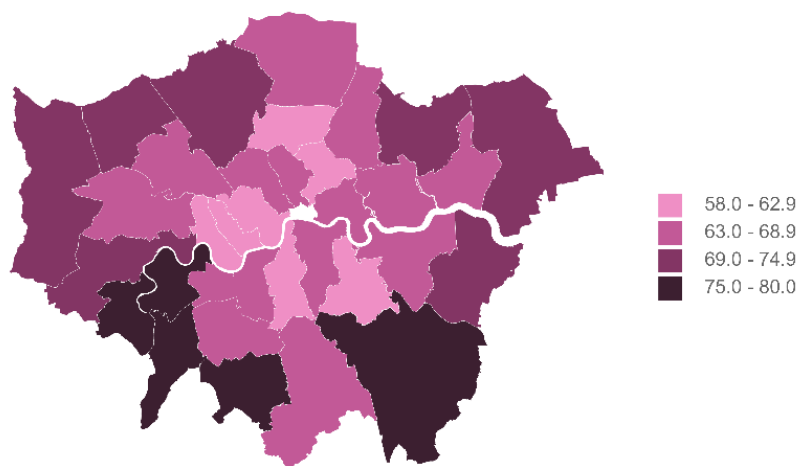
Figure 13 shows how the rate of urgent suspected cancer referrals (used to refer patients with potential cancer symptoms to secondary care for investigation and possible diagnosis) increased in London over the past decade. There is significant inequality across deprivation quintiles that has remained nearly constant over this period, with around 20% greater referral rate for the least deprived quintile compared to the most deprived. This is the opposite of the situation in England, where cancer

<sup>75</sup> [Snapshot of Health Inequalities in London - London Datastore](#)

incidence rates are 17% higher in the most deprived quintile compared to the least<sup>76</sup>. The pattern reflects the “Inverse Care Law”, whereby those who most need medical care are often least likely to receive it. Figure 13 also shows the impact of the pandemic on provision of health services, with a sharp reduction in referral rates between 2019/20 and 2020/21.

**Figure 14: Percentage of adults aged 65 years and over who received the flu vaccination during Winter 2022/3**

Percentage of adults (65+ years) who received the flu vaccination between 1<sup>st</sup> September 2022 and end February 2023 as recorded in the GP record



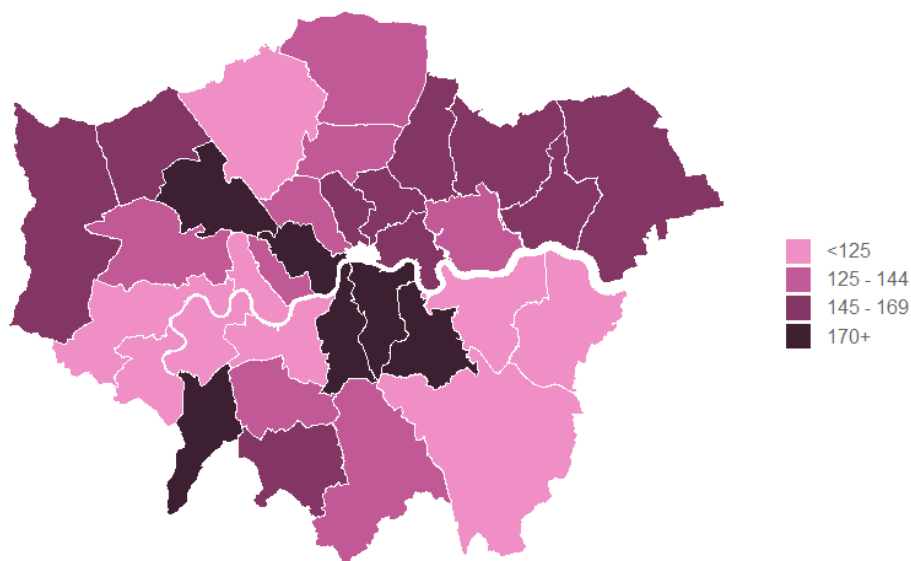
Source: [Vaccine uptake guidance and the latest coverage data - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/vaccine-uptake-guidance-and-the-latest-coverage-data)

Vaccination coverage is another indicator used to illustrate health inequalities. It serves as a useful proxy for the level of protection a population will have against vaccine-preventable communicable diseases. Figure 14 shows the variation within London in rates of coverage of the vaccination against influenza, a highly infectious viral illness. The World Health Organisation recommends coverage should reach or exceed 75% uptake for people aged 65 years and over, and Figure 14 shows this level was only reached in four London boroughs during Winter 2022/23. Across the whole of London, the rate was 68% which compares unfavourably with England’s 80% rate. A higher uptake rate of the flu vaccine would likely contribute to easing winter pressure on primary care services and hospital admissions in London, with obvious positive ramifications for Londoners’ overall health.

<sup>76</sup> [Cancer in the UK 2020: socio-economic deprivation \(cancerresearchuk.org\)](https://www.cancerresearchuk.org/health-professional/cancer-statistics/cancer-in-the-uk-2020)

### Figure 15: 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



Source: [OHID Child and Maternal Health fingertips profiles](#) Data for City of London were combined with those for Hackney.

Figure 15 shows the variability in the rate of emergency hospital admissions for asthma across London. As well as the common 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 key determinants of admissions rates. 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 were greatly reduced in 2020/21, however rates cannot be compared with more recent data due to uncertainty in the population data used in their calculation. The rates mapped above for 2021/22 ranged from below 80 in Hounslow and Greenwich to above 200 per 100,000 in Brent and Lewisham.

## 14: CONCLUDING THOUGHTS

This report presented the latest available data on London's economic and social realities from a variety of sources. Its main finding is that while London has and continues to demonstrate remarkable socioeconomic resilience in the face of significant challenges, the city remains confronted by several problems. Below are important thoughts to take away:

1. **London is weathering multiple storms better than other parts of the country, and better than expected.** At this stage, we are past the most severe economic and social impacts of the COVID-19 pandemic. While the pandemic unquestionably retains a footprint across London's social outcomes, we have seen that the cost-of-living crisis has been playing a more prominent role over the past 12 months. Nevertheless, by virtue of its position as the country's economic engine, its offering as a hub for service-based activity and its broader social and cultural environment, London has been outperforming the rest of the UK across many important indicators: economic growth is higher, the population is more diverse, volunteering and community participation rates are higher, and healthy life expectancy is greater.
2. **London is more vulnerable to the cost-of-living crisis than other regions.** London's economic success comes with a price. Prices for necessities tend to be much higher in London than elsewhere in the UK, and with the Office for Budget Responsibility recently forecasting higher and more persistent inflation, this is likely to impact London more substantially. This would suggest that many of London's main crises – from unaffordable housing to rising cost of living – will continue and could be exacerbated. This would have implications for the subsequent point.
3. **London's economic and social inequalities are starker than they are elsewhere in the UK.** Income inequality remains pronounced in the city, and poverty rates (whether relative or persistent) are still high – something that the aforementioned cost-of-living crisis is likely to aggravate. We have seen how educational attainment (whether for children or adults), health and wellbeing outcomes, access to transportation and infrastructure, and even feelings of community trust and welfare differ significantly across financial, ethnic, gender, and other strata. Londoners with protected demographic and economic characteristics still do not share as much of the city's broader economic success, while suffering disproportionately as a result of the pandemic and the cost-of-living crisis. Further growth in such inequalities is unsustainable in the long term, and could risk neutralising the very attributes on which London's success is constructed.
4. **London's short-to-medium term future, while not as bleak as the UK's, is still precarious.** This report presented economic forecasts for the city, which show that growth will slow down over the next 1-2 years while inflation will stay high. History shows that in times of slowing growth and high inflation, it is the most disadvantaged in society who will unfortunately bear the disproportionate burden rather than the privileged. At a time when at least half

of Londoners report concerns about affording their housing and the bottom decile's income after housing costs is nearly 10 times lower than the top decile's, this would represent a dangerous development, especially when more research is demonstrating the adverse ramifications of inequality on economic growth and prosperity.

In summary, we should celebrate London's remarkable resilience and successful features, especially given the extraordinary challenges we have been facing. Nevertheless, there is still some way to go not only to address ongoing problems, but to ensure that we prevent such problems from getting worse and undermining the very success that we can currently celebrate.