CITY INTELLIGENCE

The State of London

A review of London's economy and society

June 2024

Copyright

Published by

Greater London Authority
City Hall
Kamal Chunchie Way
London E16 1ZE

www.london.gov.uk

Tel 020 7983 4000

For more information about this publication, please contact:

City Intelligence

Email intelligence@london.gov.uk

Contents

1: FOREWORD

This is the fifth 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 present 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.

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 transport.

Indicators in the report have been selected to provide a broad and high-level understanding of a particular topic or theme – we have tried to include those that update as frequently as possible 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 used where available to show an understanding of longer-term trends. The latest data are provided at the time of drafting the report in May 2024. A companion State of London Dashboard is published online where the charts in the report can be found.

It should also be noted that this report may cover different topics in future editions to align with evolving GLA priorities. It will also become an annual publication.

Many thanks go to all the teams and people who contributed to this publication, but special recognition should go to the following: Gordon Douglass, Matthew Daley, Ben Corr, Joe Heywood, Héctor Espinoza, Barry Fong, Mike Hope, Nick Jacob, Monet Durieux, Yamini Cinamon Nair, Ellie Bloom, Veronica Tuffrey, Abigail Lyons, Sarah Willis, Sophie Deakin, James Gleeson, Guk Yu, Sixia Zhang, Jeff O'Reilly, Micheal Slade, Guillaume Paugam, Mike Brondbjerg, and Daryl Rozario.

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

Adam Yousef
Senior Manager, GLA City Intelligence

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
GEOGRAPHY		
Area	1,571.9 km^2	Office for National Statistics (2021)
Biggest borough	Bromley (150.2 km^2)	
Smallest borough	Kensington and Chelsea (12.1 km^2)	City of London, while smaller (2.9 km^2), 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)[1]
City resilience ranking (2023)	3	Economist Impact City Resilience Index (2023)
DEMOGRAPHY		
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)
ECONOMY		
Gross value added (2023)	£525.4	GLA Economics (2019 constant prices; £billion)
Employment rate	74.4%	ONS (adjusted; 3 months to March 2024)
Unemployment rate	4.6%	ONS (adjusted; 3 months to March 2024)
Inactivity rate	22.1%	ONS (adjusted; 3 months to March 2024)
Income	£2,790	Median nominal monthly pay (HMRC RTI data); March 2024
Poverty	24%	Percent of the population living in households with less than 60% of the contemporary national median income (after accounting for housing costs)

[1] London Green and Blue Cover - London Datastore

Table 2: London vs New York, Paris and Tokyo

	London	New York	Paris	Tokyo
Total surface area (km^2)	1,572	2,973[2] (metropolitan area excluding inland water)	2,854 [3] (Île de France region)	2,190[4] (Tokyo Metropolis)
Percent green space[5]	33%	27%	10%	7.5%
City resilience ranking (2023)[6]	3	1	5	8
Population (million)[7]	8.8	City: 8.8 Greater New York: 20.0	13.3	37.0
Median age	35.9	37.5[8] (2024)	36[9] (2024)	49.5[10] (2024)
Foreign-born population (%)[11]	38.5	36.4	19.8	4.1
Gross domestic product ($bn; 2023)[12]	909	1,826	853	814
Unemployment rate (latest available; %)	4.6	4.8[13] Apr 2024	7.2[14] Mar 2024	4.6[15] 2024
Property Price Index (2024)[16]	16.1	11.0	17.4	11.9
City Happiness Index ranking (2020)[17]	36	30	43	79

[2] Area of New York City - The Physics Factbook (hypertextbook.com)
[3] ÎLE-DE-FRANCE, région administrative - Encyclopædia Universalis
[4] 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)
[5] World Cities Culture Forum – Data - World Cities Culture Forum
[6] The Resilient Cities Index – The Resilient Cities Index 2023 (economist.com)
[7] London and Partners (2023). Global Cities Comparison Report.
[8] NYC population 2024: Roughly, how many people live in NYC? (yahoo.com)
[9] Paris, France Population (2024) - Population Stat
[10] Median Age of Japan 1950-2023 & Future Projections (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'.
[11] fDi Intelligence from the Financial Times Ltd
[12] Obtained from London and Partners (2023). Data itself compiled by JLL (June 2023) and sourced from JLL/Oxford Economics
[13] https://dol.ny.gov/labor-statistics-new-york-city-region
[14] https://www.insee.fr/fr/statistiques/2109644
[15] Tokyo review | 97 facts and highlights (versus.com)
[16] Property Prices Index 2024 Mid-Year (numbeo.com). Index is ratio of median apartment prices to median familial disposable income.
[17] 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 the report's chapters.

Economy and Labour Market

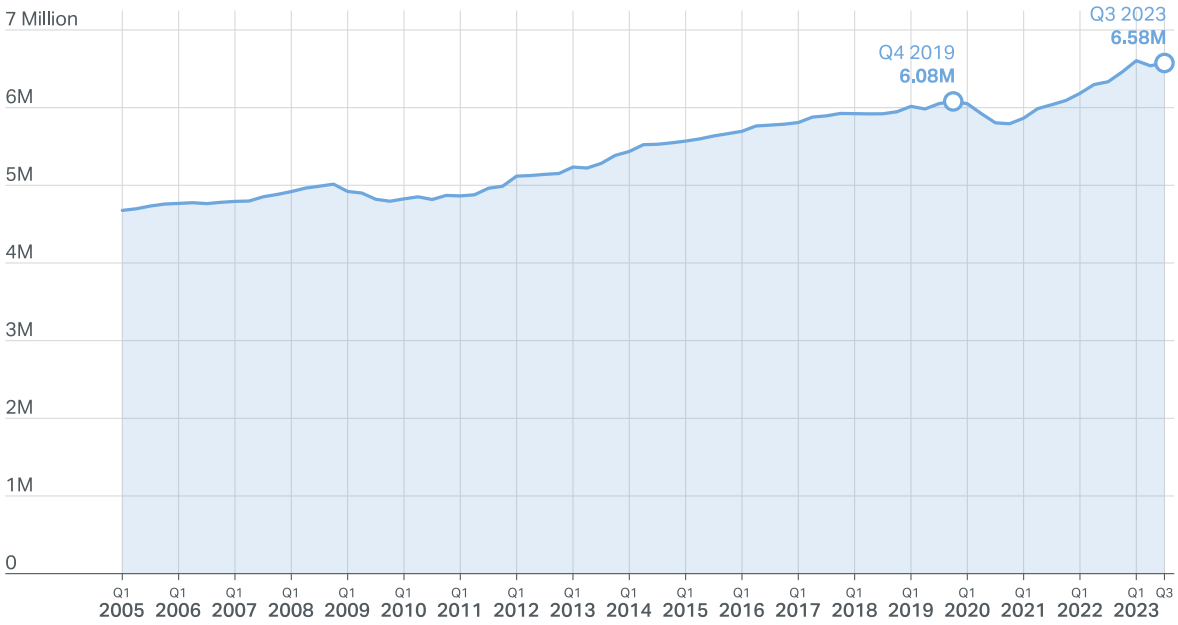
The estimated number of workforce jobs in London reached 6.58 million in Q3 2023, up 8.2% on Q4 2019.

The ONS estimates that London's real GVA grew by 4.8% in 2022, outpacing the UK's real GDP growth of 4.3%.

London's economy is becoming more diversified, with the information and communication and professional services sectors experiencing greater growth than that for financial services.

The estimated number of workforce jobs in London reached 6.58 million in Q3 2023, up 8.2% on Q4 2019

Estimated number of workforce jobs in London, Q1 2005 - Q3 2023



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

Income, Poverty and Destitution

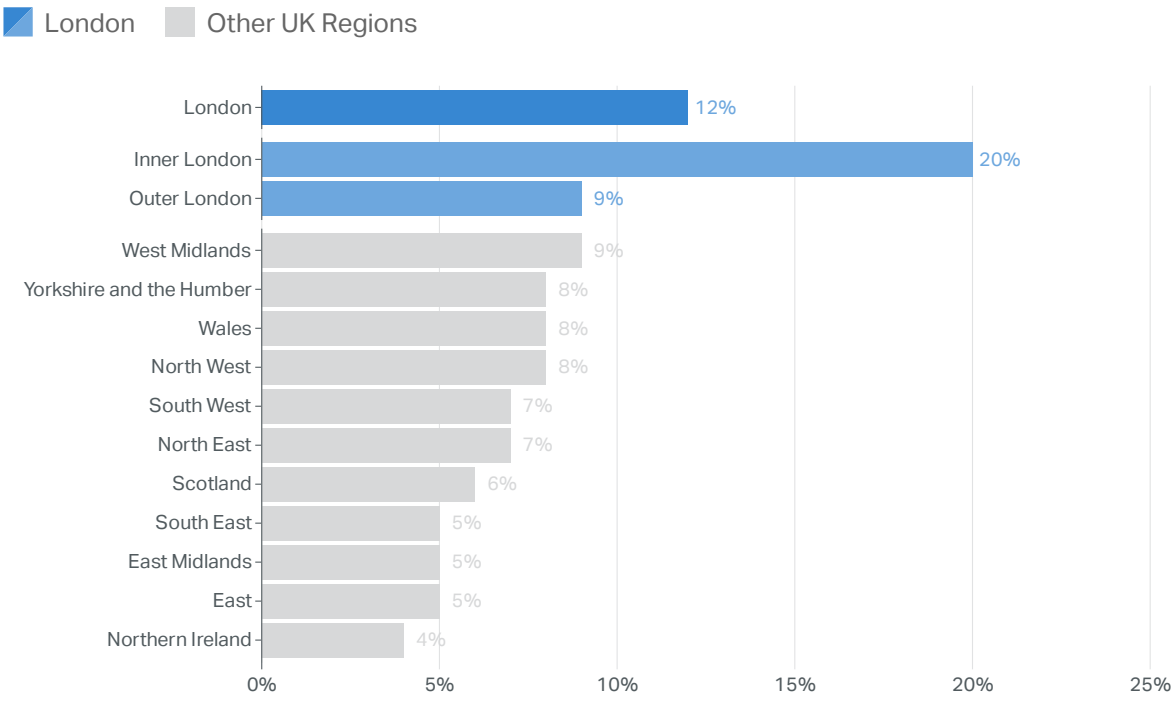
Income inequality within London is stark. For example, material deprivation is consistently more prevalent among London's pensioners than elsewhere in the UK.

The reduction in number of Universal Credit (UC) claimants in London seen to mid-2022 has reversed, climbing back to over one million in April 2024. It is now higher than during the pandemic.

One in seven Londoners were classed as in persistent poverty between 2018 and 2022, a proportion well above the national average.

Material deprivation is consistently more prevalent among London's pensioners than elsewhere in the UK

Percentage of pensioners in material deprivation by region (2020/21-2022/23)



Source: DWP Households Below Average Income 2020/21-2022/23
Graphic: GLA City Intelligence

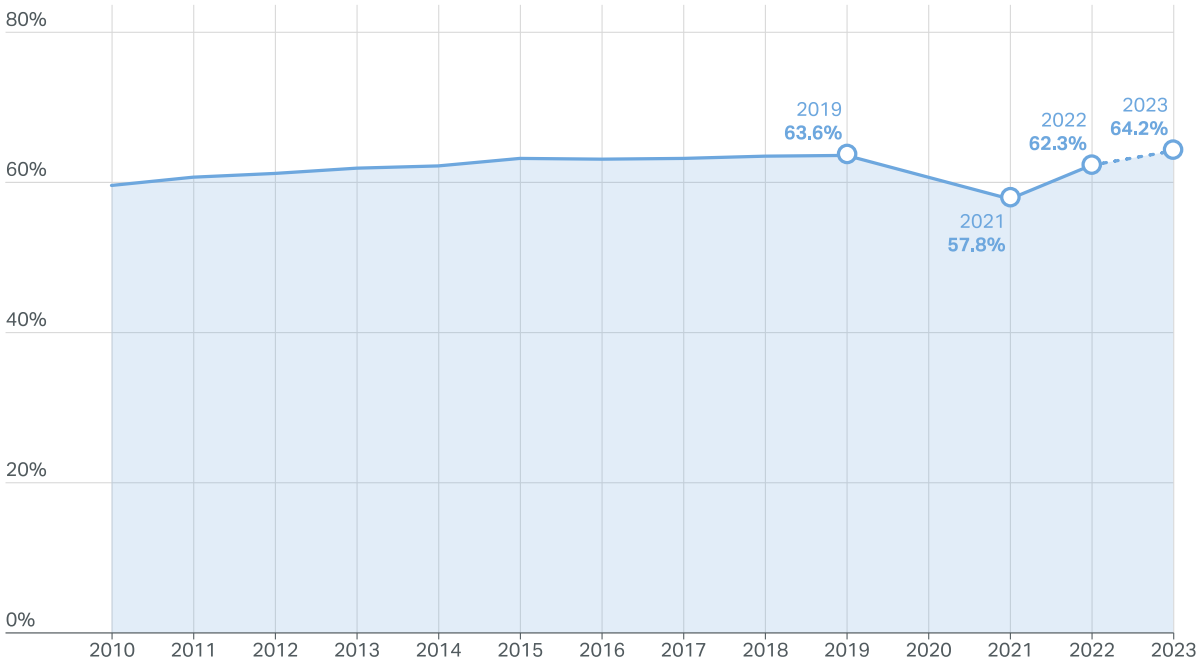
Transport and Infrastructure

In 2022, the proportion of trips made by active, efficient and sustainable travel rebounded to 62.3%, and provisional estimates show that it would reach 64.2% in 2023, compared to 63.6% pre-pandemic (in 2019).

In general, although indicators of public transport show positive signs of recovery towards pre-pandemic baselines, there remain gaps in demand, active travel and service performance against pre-pandemic norms.

In London, the proportion of trips made by active, efficient and sustainable travel has rebounded to at least 62.3% from a low of 57.8%

Proportion of trips made by active, efficient and sustainable travel, 2010 - 2023



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

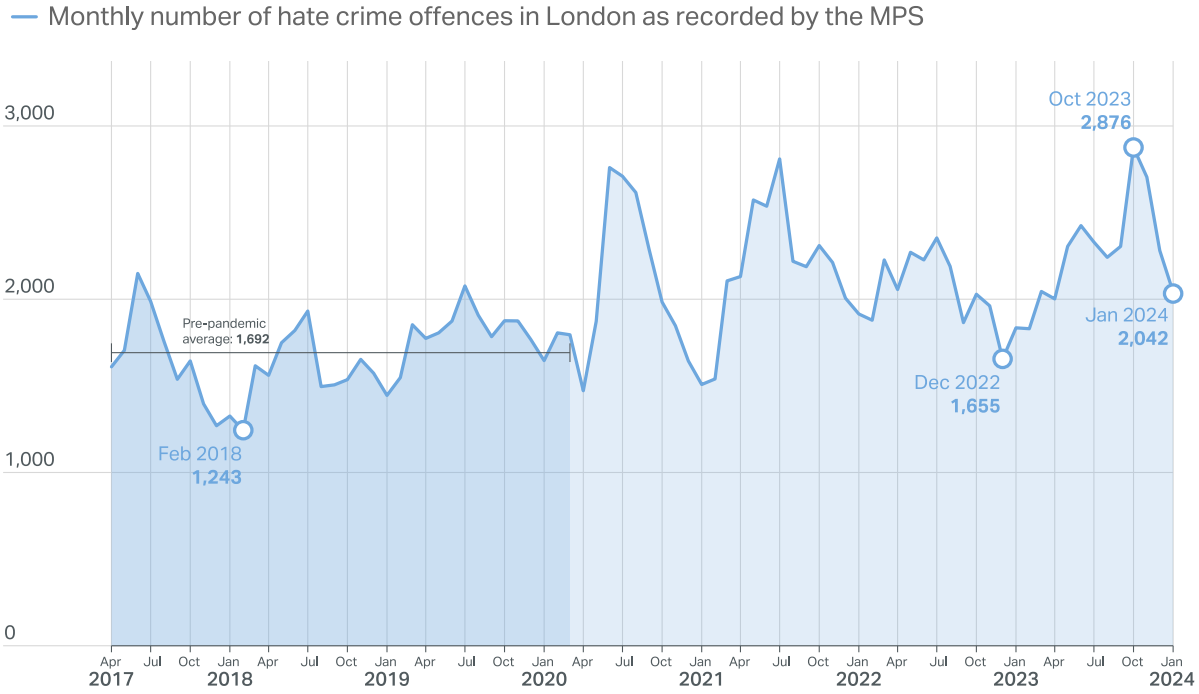
Communities

After a surge towards the end of 2023, the number of recorded hate crimes has fallen again to just above pre-pandemic levels.

In February 2024, nearly half of Londoners (46%) said that they had trust in their GP. Meanwhile, trust was lowest for London media (20%), borough councils (20%) and the Metropolitan Police Service (23%).

After a surge towards the end of 2023, the number of recorded hate crimes has fallen again to just above pre-pandemic levels

Number of hate crime offences in London as recorded by the MPS, Apr 2017 - Jan 2024



Source: Metropolitan Police Service
Graphic: GLA City Intelligence

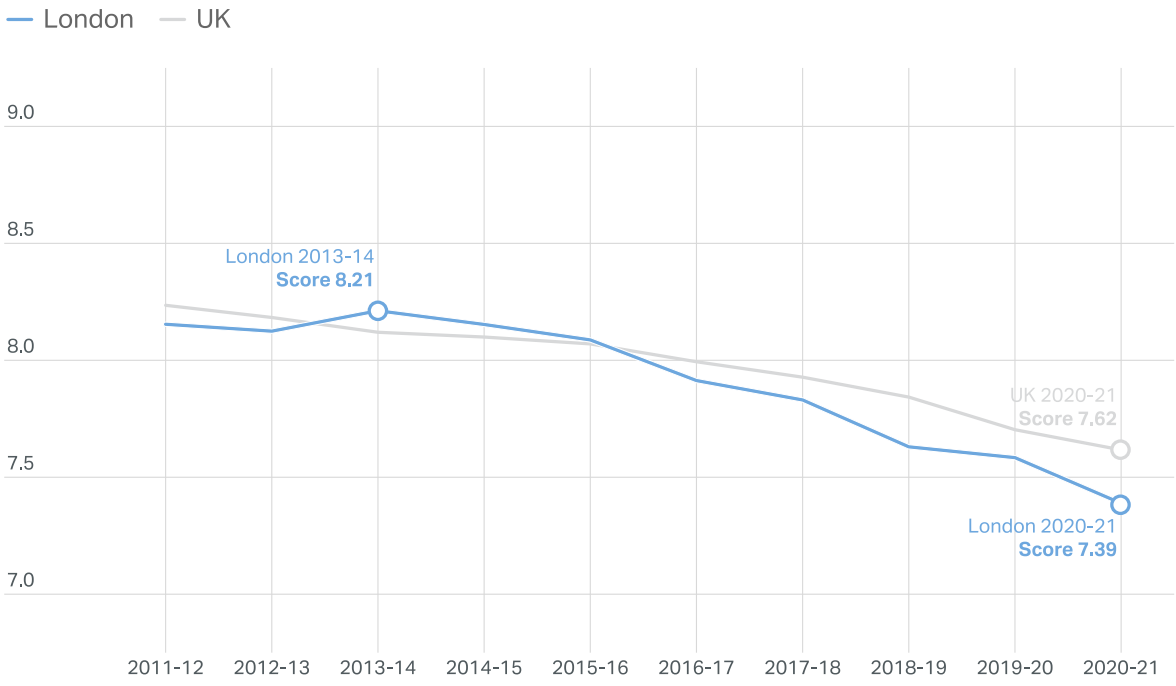
Young people & Education

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.

Between August 2015 and 2023, there was a 26% decrease in number of registered early years providers across London. Although the total number of providers decreased, the number of spaces they provide increased by 12% during the same period.

Reflecting a national trend, London children's mean happiness score decreased from 8.2 in 2011-12 to 7.4 in 2020-21

Children's mean happiness score for life as a whole.



Source: Understanding Society Survey
Graphic: GLA City Intelligence

Health, Wellbeing and Inequality

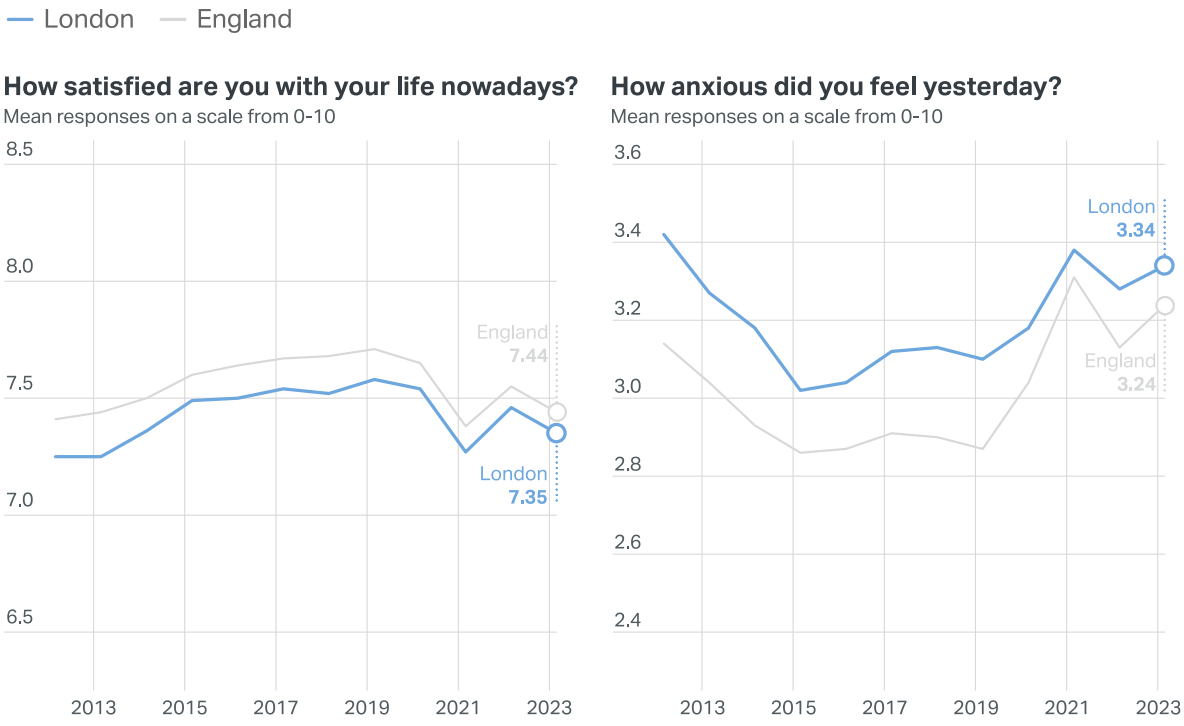
Mean life satisfaction fell whilst mean anxiety levels increased in 2022/23 for both London and England, with London levels worse than England's for both indicators.

In London, healthy life expectancy decreased for females at birth whilst increasing slightly for males in 2022/23. Whereas at ages 60-64, it increased for females and decreased for males.

For certain vaccines, their uptake continues to decline from 2015-16 rates and remains lower in London than the England average.

Mean life satisfaction fell whilst mean anxiety levels increased in London and England, with London levels worse than England's for both indicators

Anxiety and life satisfaction for adults in London, 2011-12 to 2022-23



Source: Office for National Statistics (Based on Labour Force Survey)
Graphic: GLA City Intelligence

Housing

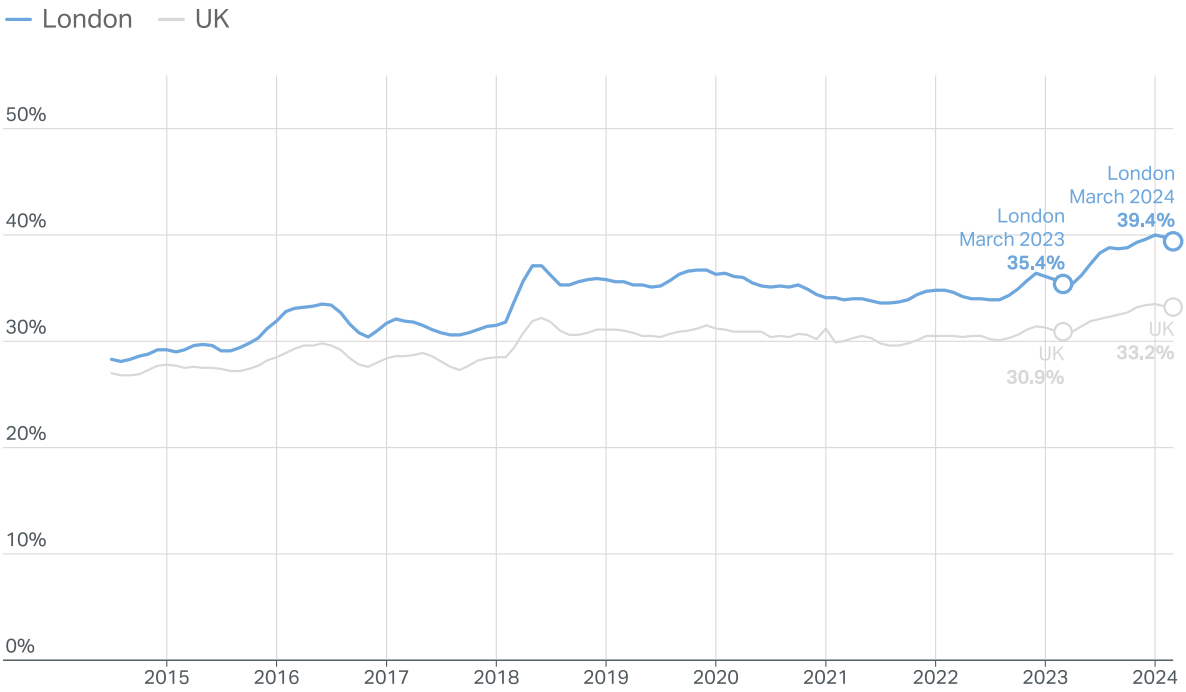
Rent on new tenancies in London accounted for an average of 39.4% of tenant incomes in March 2024, up sharply from 35.4% in March 2023.

The number of Energy Performance Certificates (EPCs) issued for new homes in London in the year to March 2024 dropped by 11%. The annualised figure (34,013) is the second lowest since 2015.

The total number of claims by social and private landlords in London increased from 2020 onwards.

Rent on new tenancies in London accounted for an average of 39.4% of tenant incomes in March 2024, up sharply from 35.4% in March 2023

Rent as share of household income, for new tenancies.



Source: Homelet Rental Index
Graphic: GLA City Intelligence

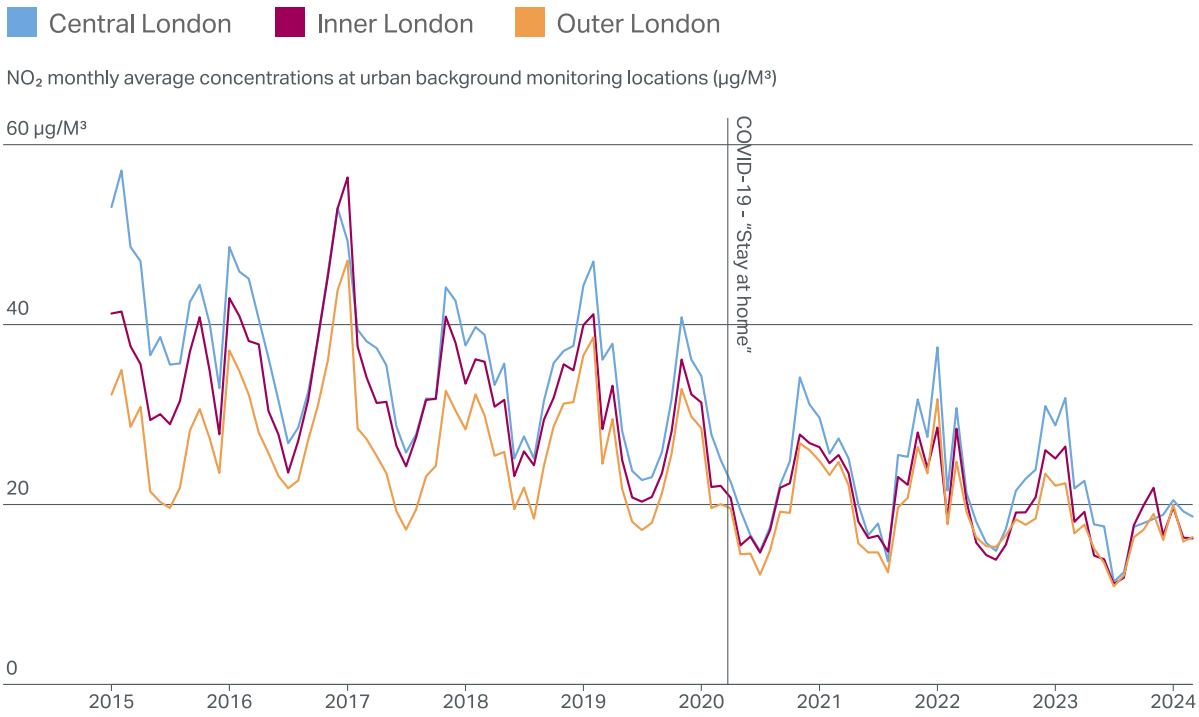
Environment

Nitrogen Dioxide (NO_2) concentrations in 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 pandemic.

London's annual greenhouse gas (GHG) emissions in 2021 were 28.7 million tCO_2e. This represents a 44% reduction compared to 2000, when emissions peaked.

Nitrogen Dioxide (NO_2) concentrations in London have been decreasing since 2017, with Central London experiencing a more significant reduction

NO_2 monthly average concentrations at urban background monitoring locations



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

4: DEMOGRAPHY

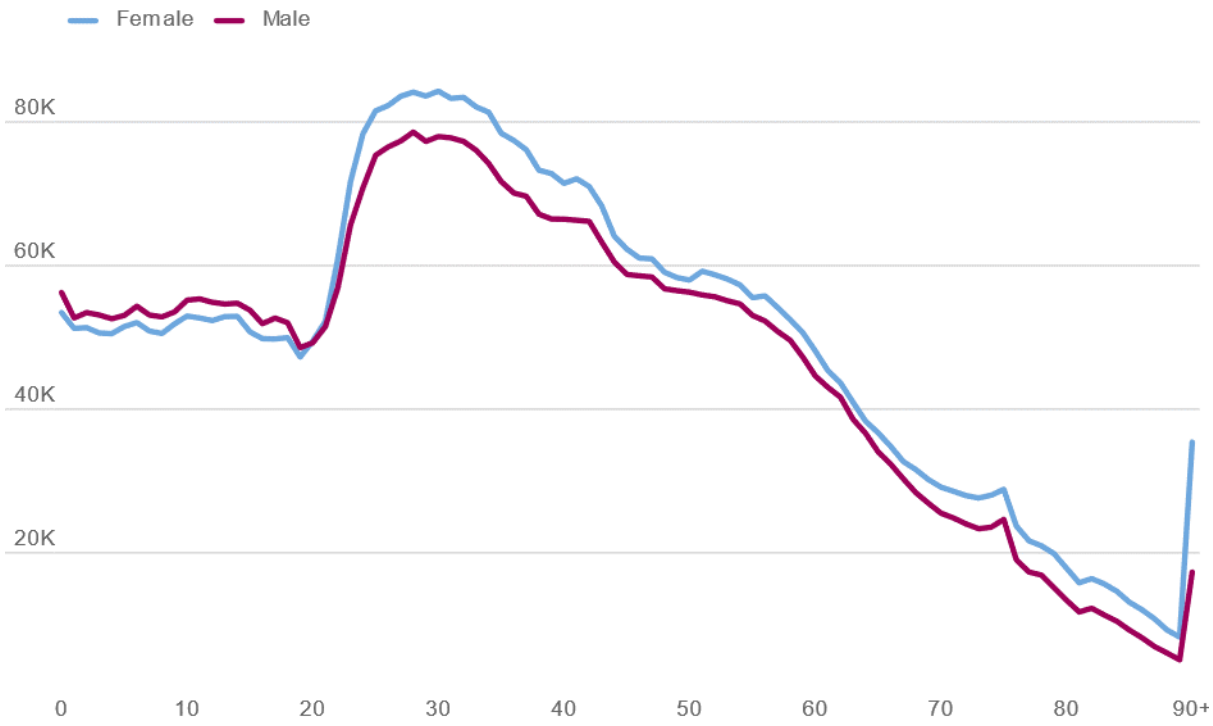
This chapter provides data and recent trends on London's demographics. For more population statistics and analysis, including demographic projections, see the demography pages of the London Datastore.

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'. Detailed 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 will publish findings from analysis of changing numbers of children and families in London in the report 'London's population of young children – current and future'[18].

The 2022 mid-year estimates published by ONS in November 2023 gave London's population as 8.87 million. Figure 1 shows how the population is distributed across the age range. Females account for around 51.5% of the total population.

Figure 1: Population age structure, London

Total population (thousands), estimates for year ending June 2022



Source: Population estimates for England and Wales - Office for National Statistics (ons.gov.uk)

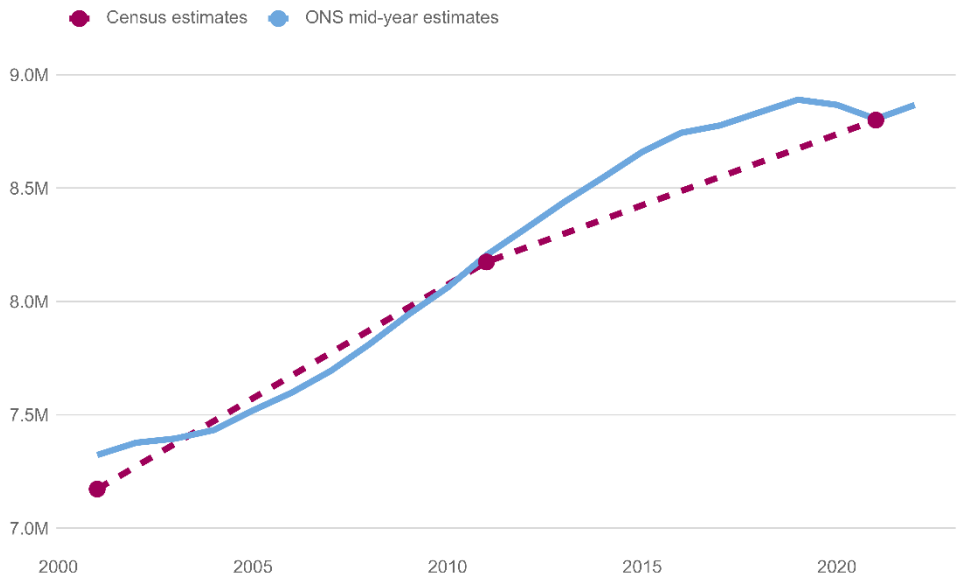
[18] Please note the report 'London's population of young children – current and future' will be published after 4 July 2024.

Population Change

The revised back-series of the mid-year estimates published by ONS in November 2023 (accounting for the results of the 2021 Census) revealed that previous official estimates had become increasingly inflated over the course of the decade. The revised estimates indicate that London's population fell in both the years to mid-2020 and mid-2021, and increased in the year to mid-2022, as shown in Figure 2.

Figure 2: Estimated population of London

Total population (millions), 2001 to 2022

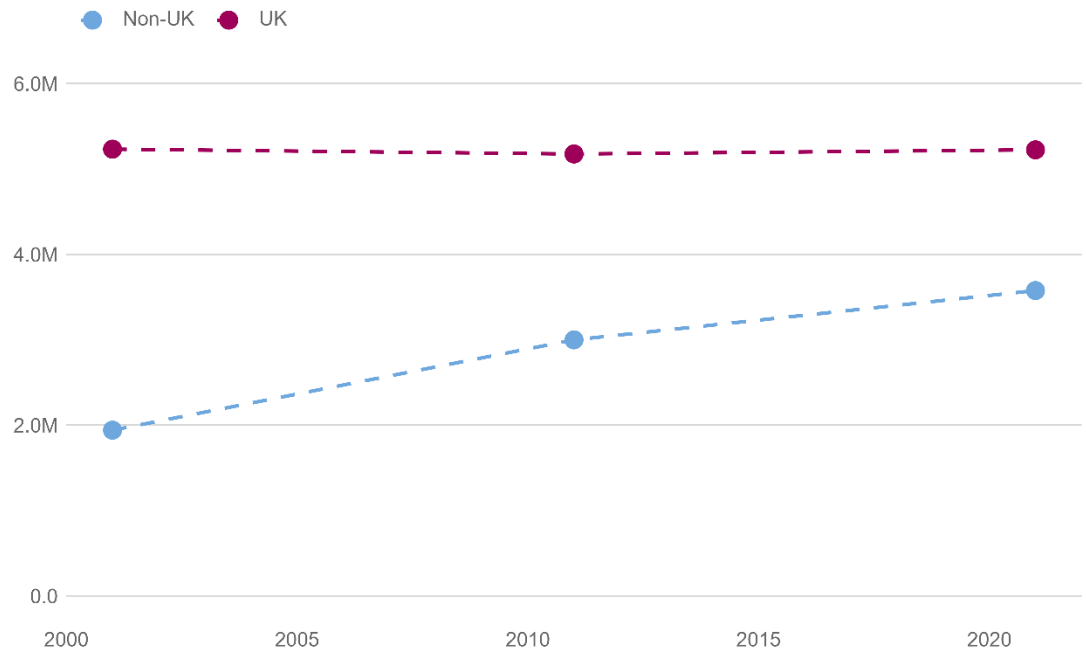


Sources: ONS Census estimates, Population estimates for England and Wales - Office for National Statistics (ons.gov.uk)

The most recent population estimate represents an increase of almost 550,000 since 2012, a far lower rate of increase than in the previous decade, when London's population grew by more than 940,000 from 2002 to 2012.

Figure 3: Population of London by whether born in UK

Total population (millions), 2001 to 2021



Source: ONS Census estimates

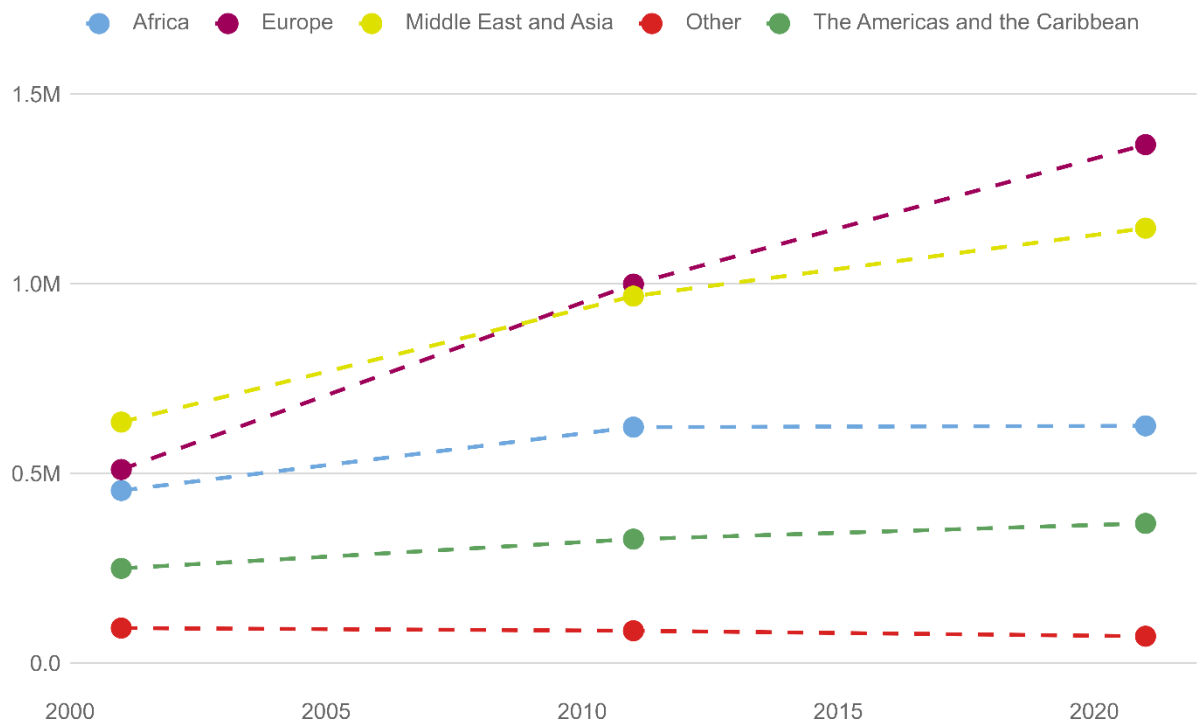
Data from the 2021 Census shows that 41% of London residents were born outside the UK – up from 37% in 2011 and 27% in 2001.

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 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 4: Non-UK born population of London by region of birth

Total population (millions), 2001 to 2021



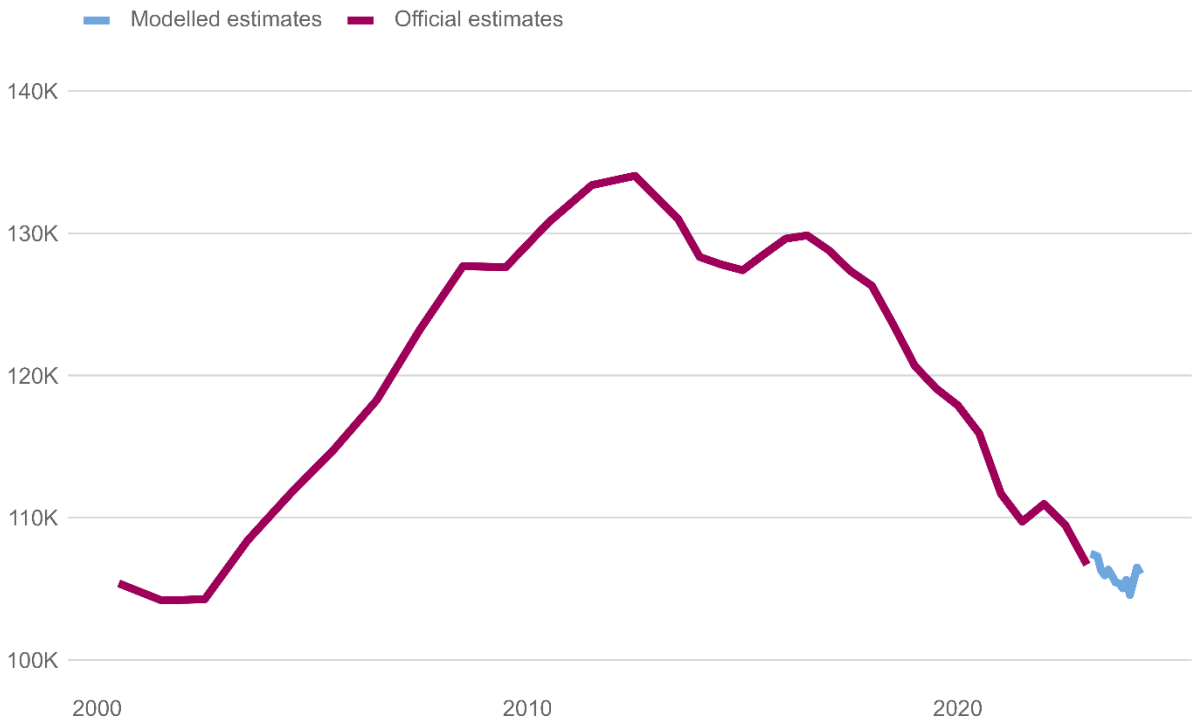
Source: ONS Census estimates

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).

Annual Births

Figure 5: Annual births in London

Annual live births for year ending (thousands), 2001 to 2024



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.

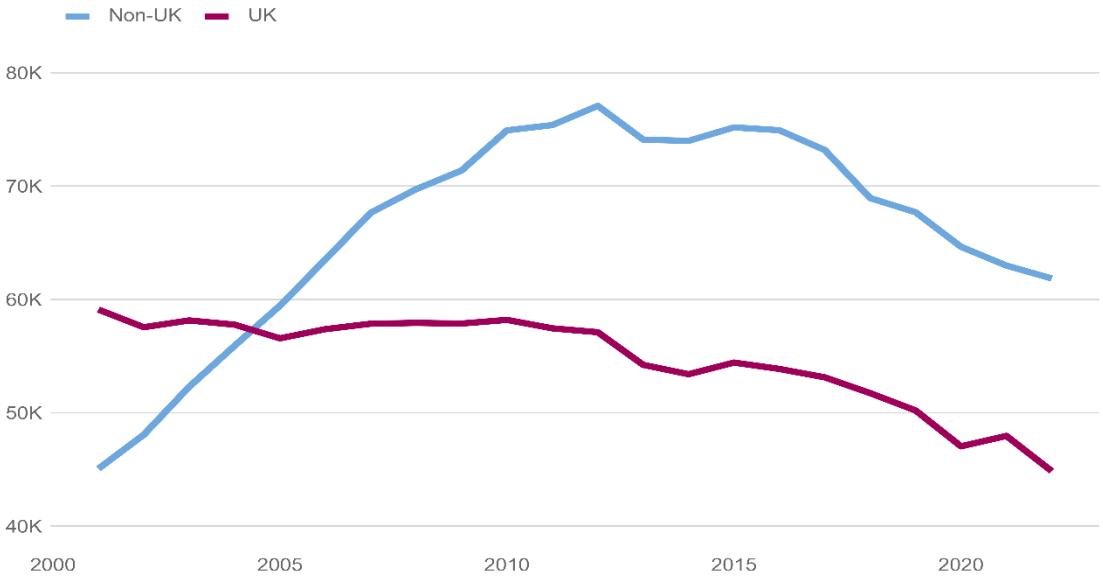
The estimates indicate that annual births fell more sharply following the start of the COVID-19 pandemic, reaching a low of approximately 110,000 in the year to mid-2021, before rising again. This reversal proved to be short-lived: annual births reached 111,000 in the year to January 2022, before resuming 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 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. Modelled data from February 2023 onwards are included in Figure 5, and indicate that the downward trend in annual births has likely continued throughout 2023, with a recent slight uptick between January and April 2024. The most recent estimate based on this data is 106,000 for the year to April 2024.

Figure 6: Annual births in London by whether mother was born in UK

Annual live births by calendar year (thousands), 2001 to 2022

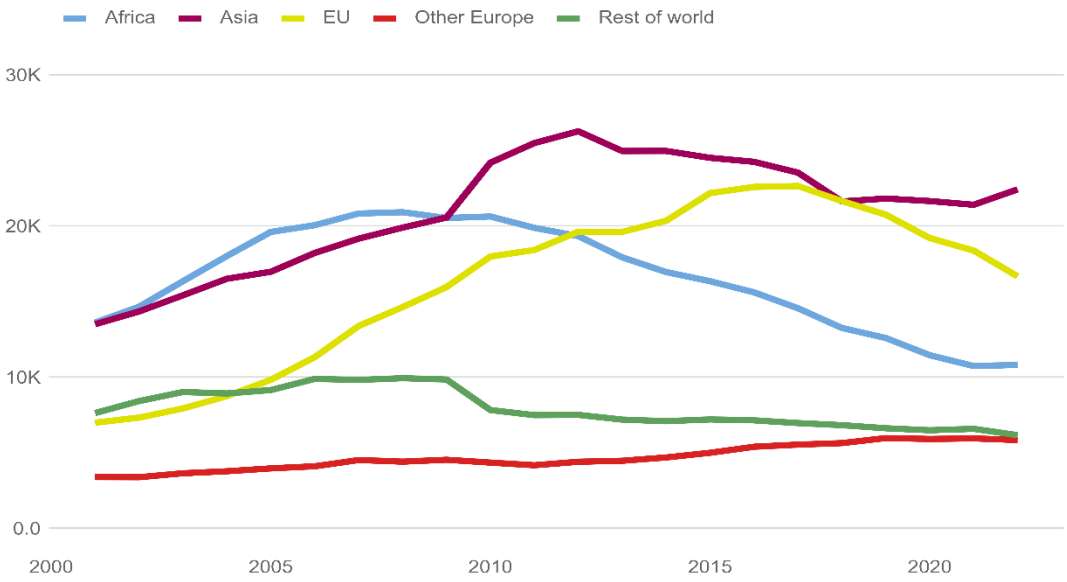


Source: ONS Live birth estimates

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 7: Annual births in London by mother's region of birth (excluding UK)

Annual live births by calendar year (thousands), 2001 to 2022



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.

International Migration

Official estimates of international migration released in November 2023 indicate that 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 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 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.

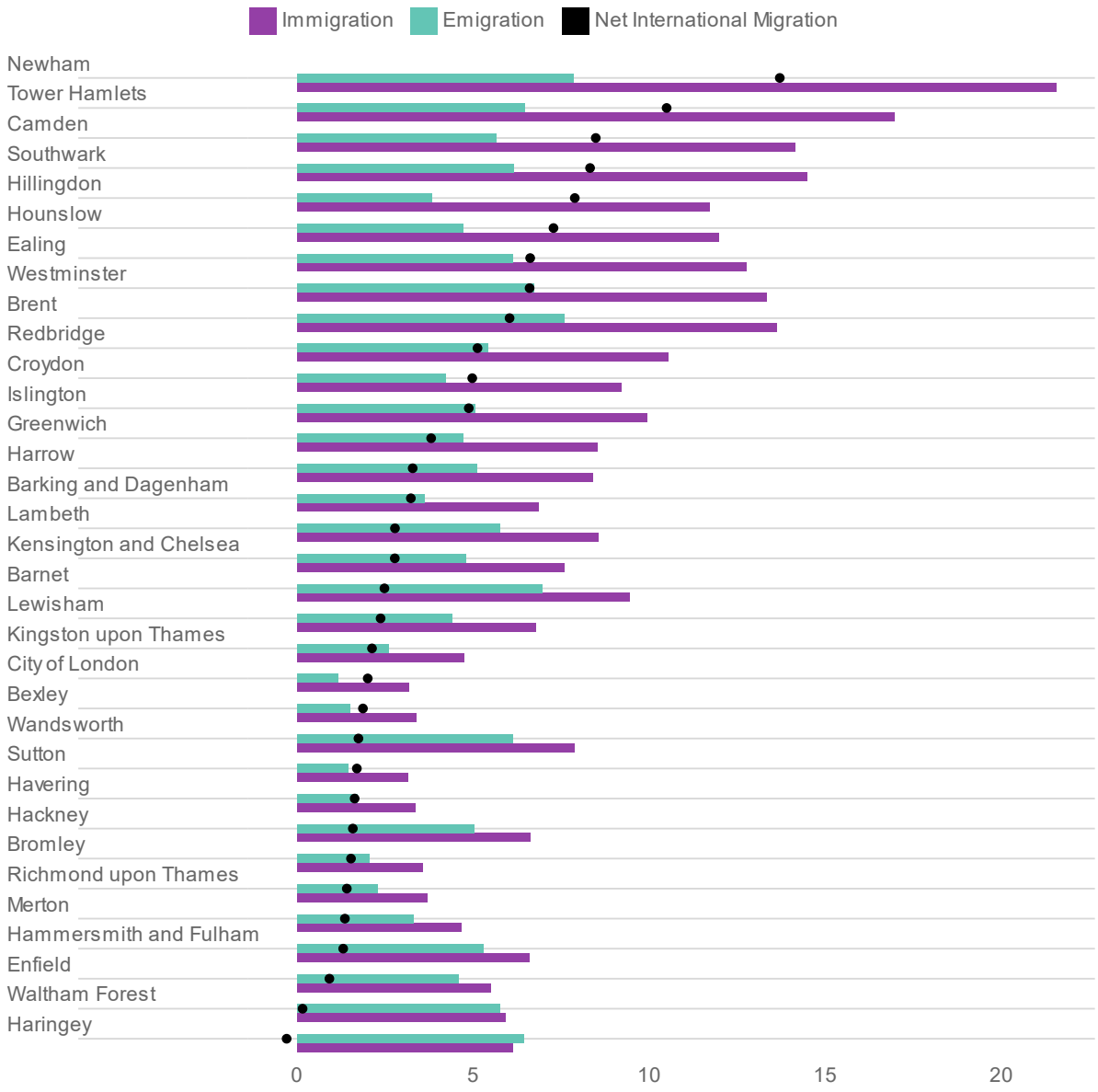
The geographical distribution of new migrants is uneven across London. Figure 8 shows that international inward migration approximately balances outward migration in three boroughs only (all in North London): Haringey, Waltham Forest and Enfield. In contrast, international inward migration considerably outweighs outward migration in several Inner London boroughs – especially Newham and Tower Hamlets.

While there is uncertainty in the individual data values[19], the existence of a high level of net migration in several boroughs is not in doubt. London continues to attract international migrants due to its robust economy (compared with other parts of the UK) and various amenities. It is also clear that reduced immigration from the EU since Brexit has been more than replaced by increased immigration from outside the EU.

[19] Recent ONS revisions indicated that international migration estimates at local authority level have been unreliable over the last decade, and that there are concerns around the new methodology whereby migration estimates are underpinned by administrative data. See Financial Times, How reliable are the UK's migration statistics? 30 May 2023

Figure 8: Annual international migration flows by London borough

Thousands of migrants, estimates for year ending June 2022



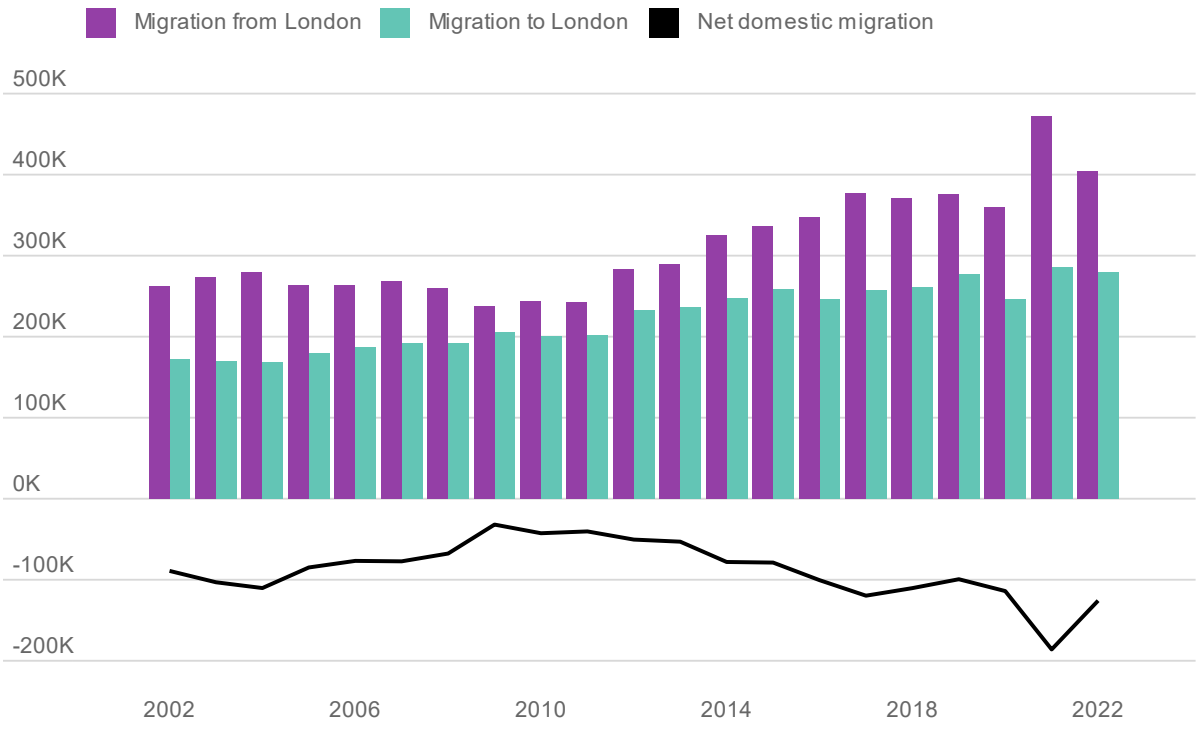
Source: ONS

Domestic Migration

Figure 9 shows the domestic inflows, outflows, and resultant net outflow from London from 2002 to 2022. The size of net migrant outflows from London declined in the years leading up to the financial crisis (this is not attributable to international migration since data are recorded as domestic moves). Net outflows between 2016 and 2019 were between 100,000 and 120,000, after which more migrants left London during the COVID-19 pandemic, leading to a sudden increase in net outflow to 186,000. By mid-2022 the net migrant outflow returned to around 126,000.

Figure 9: Domestic inflows, outflows and net migration, London

Thousands of migrants per year, 2002 to 2022



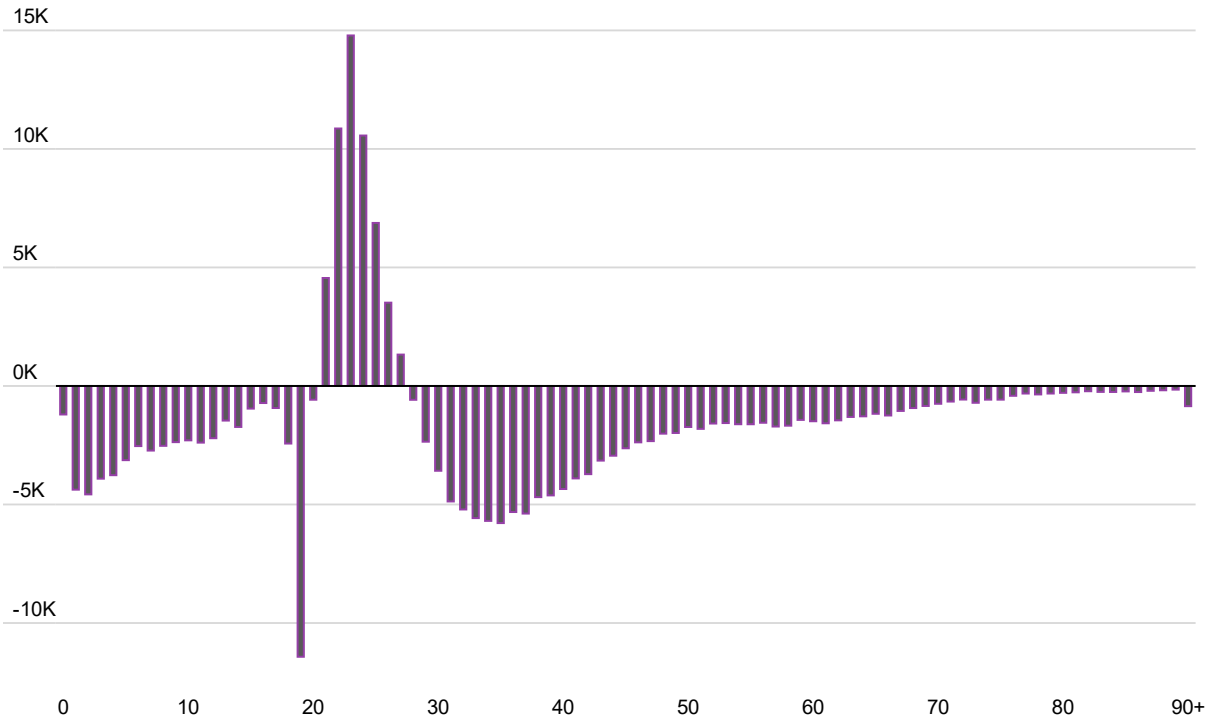
Source: ONS

Figure 10 shows net domestic migration by single year of age for the year to mid-2022. It is only for those between the ages of 21 and 26 that the number arriving was greater than the number leaving London. This positive net flow to London likely relates to accessing education and finding work. The greatest net outward flows (more than 3,000 per single year of age) were for those between the ages of 1 and 5 and between 30 and 43. The reduction in the extent of outflows from age five reflects a reduced tendency for families to relocate once children start attending primary school. A further reduction in outflows from age 12 would correspond to the period when children start secondary school. The data indicates a large net outflow of individuals aged 19[20] which the ONS previously suggested is linked to students starting higher education courses outside London[21]. The most important factors that potentially drive those aged between the late 20's and early 40's to leave London are the high cost of housing in London and the limited availability of larger housing for families. Another potential factor is the desire for a greener environment outside London[22]; see our soon-to-be-published report for more details[23].

[20] Age of internal migrants is based on age at mid-year rather than age at date of move. For example, if someone born in May 2004 moved from London to start university in September 2022, their age in the dataset would be 19, even though they were 18 when they moved.
[21] See ONS
[22] See, for example: BBC, Renters leave London at highest rate in decade, research shows, 13 February 2023; and GLA, Half of Londoners wanting to move home want out of London, 21 August 2020. Respondents to a GLA survey during the COVID-19 pandemic most often cited access to private outside space, and proximity to public green space, as factors that had become more important in thinking about where to live.
[23] GLA, London's population of young children – current and future, (to be published after 4 July 2024)

Figure 10: Net domestic migration by single year of age, London

Thousands of migrants, estimates for year ending June 2022



Source: ONS

5: THE ECONOMY & LABOUR MARKET

This chapter presents the latest data on London's economy, businesses, jobs and skills.

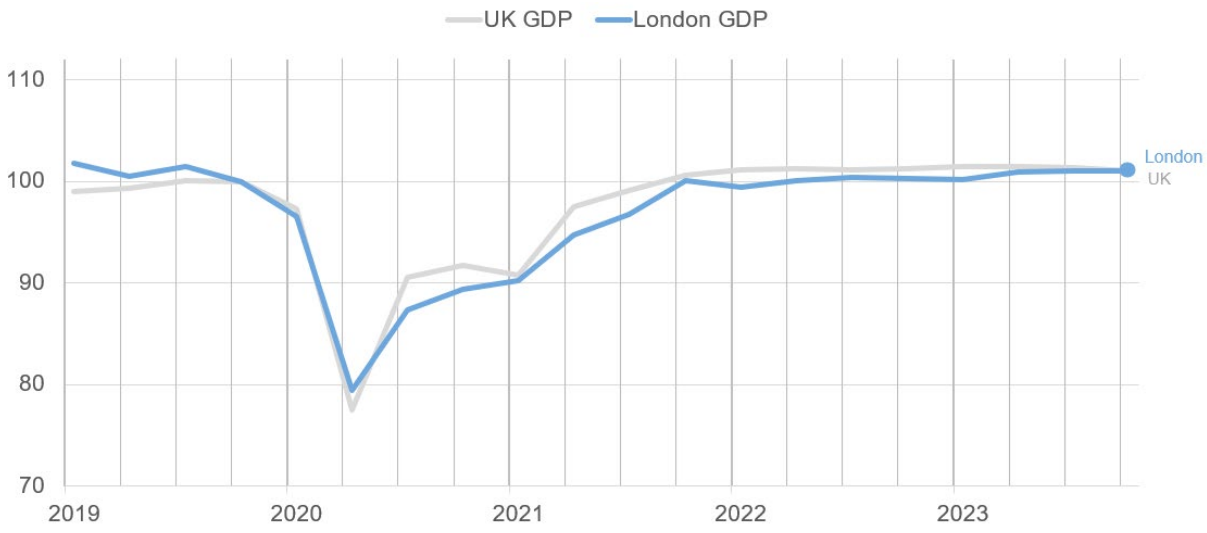
It includes metrics on London's economic output, consumer confidence, foreign direct investment, and business population. It also covers UK trade flows, to which London contributes significantly, and labour market indicators (e.g., employment, unemployment and inactivity rates). It also features information on job quality, low pay and skills attainment.

Most indicators cover trends to late 2023 or early 2024, with some updating annually (i.e., less frequently).

For more information on London's economy, see the monthly GLA Economics publication, 'London's Economy Today'. An assessment of London's economic prospects, including forecasts, is provided in the bi-annual publication 'London's Economic Outlook'. Detailed analysis on London's labour market, including 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.

Economy and Business

Figure 1: London's real Gross Value Added (GVA)
Index, Q4 2019 = 100



Source: GLA calculations, Office for National Statistics

Note: GLA Economics estimated London figures for 2020 to 2023 Q1 in line with ONS quarterly regional statistics and Nowcast figures to 2023 Q3.

The ONS recently released annual regional output figures for 2022, along with revised figures from 1998 to 2021. London's GVA for 2020 and 2021 was revised

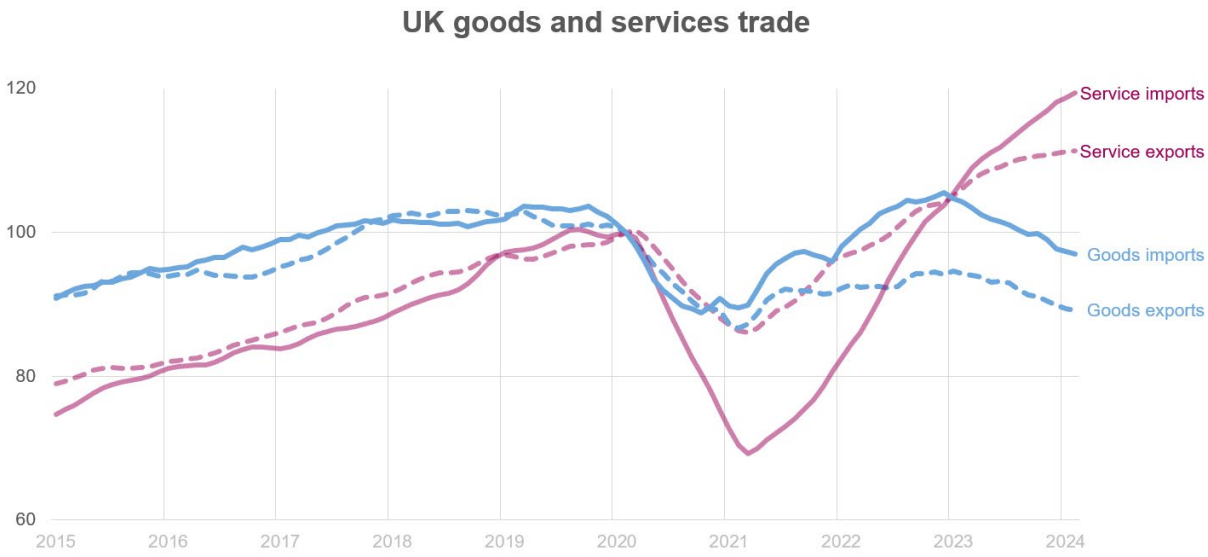
down by 3.65% and 5.18%, respectively. GLA Economics made corresponding sector-level adjustments to ONS quarterly figures for London and developed a projection for 2023.

The ONS estimates that London's real GVA grew by 4.8% in 2022, outpacing the UK's real GDP growth of 4.3%. Among the UK's regions, London experienced the largest output increase. GLA Economics estimates that London's GVA increased by 0.7% in 2023 - higher than the UK's 0.1% GDP increase.

The revised ONS data suggests that London recovered from the pandemic in Q1 2022, while the UK did so in Q4 2021; that said, London recovered more strongly than the UK during 2022. By Q4 2023, both the London and UK economies were 1% larger than their pre-pandemic levels.

Figure 2: UK goods and services trade

Index, February 2020 = 100



Source: Office for National Statistics. Note: Data on UK trade in goods and services adjusted for inflation

Recent data point to a robust recovery in the UK's trade after significant disruption during the pandemic. Having hit a low in 2021, the UK's service imports and exports rebounded, achieving record highs in February 2024. While goods imports returned to pre-pandemic levels by March 2022 and peaked in December 2022, they have since decreased. The recovery of goods exports has been the most modest, remaining 13% below their pre-pandemic peak as of February 2024.

Despite the relatively strong performance of UK service exports and imports, the country's trade surplus has been decreasing since 2022 due to stronger import growth. Services now constitute a record portion of UK imports and exports, with London capturing an increasingly large share. London accounted for 40% of UK service imports in 2021[24], and from 2016 to 2021, the capital's contribution to service

[24] ONS International trade in UK nations, regions and cities: 2021

exports rose from 38% to 46%.[25] Moreover, London's exports are more diversified. During the same period, its information and communication services (up 15%) and professional services sectors (up 12%) experienced significant annual export growth, exceeding that of financial services (up 8%)[26].

Figure 3: Weekly card spending on retail across London

Index, February 2020 = 100

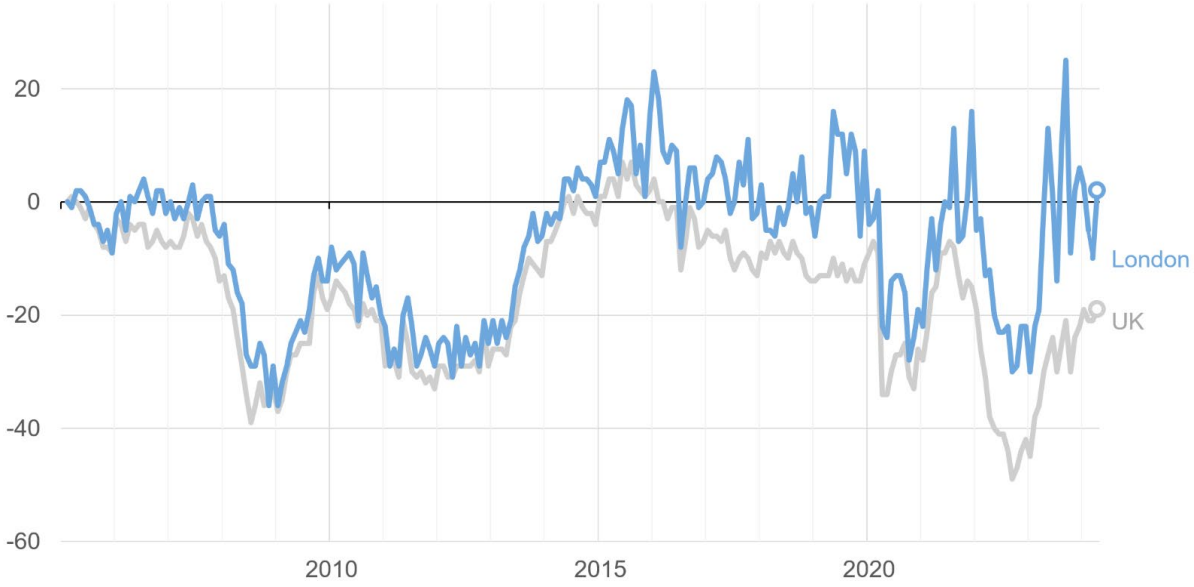
Source: GLA City Intelligence, Mastercard's Retail Location Index. Note: Data adjusted for inflation and pandemic-induced shift from cash to card transactions.

Mastercard data shows that London's retail spending in inflation-adjusted terms grew and peaked in Q4 2023. Subsequently, it slowed during weekdays and weekends. These figures have not yet recovered to late-2023 levels, although weekend spending rebounded more strongly. Overall, card spending on retail remained resilient despite the cost-of-living crisis.

[25] The Resolution Foundation
[26] Ibid

Figure 4: Consumer confidence in London

Confidence index, 0 = neutral



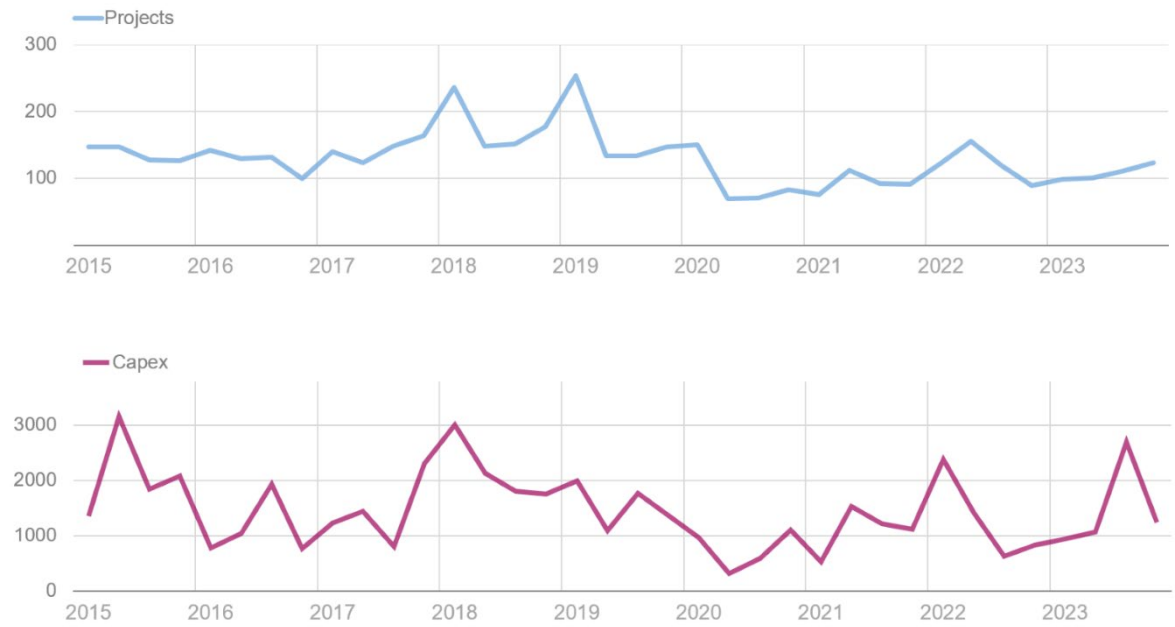
Source: GfK NOP

Consumer confidence in London has been volatile since 2020. After relative troughs in 2020 and 2022, it improved sharply between January and May 2023, rising by the largest amount on record (from -30 to +13). Since Q2 2023, it has oscillated around the zero mark.

Meanwhile, consumer confidence across the UK remained weak in April 2024 (at -19), and the UK has not seen a positive score since January 2016. This suggests that UK households remain more pessimistic about the economic outlook than London's.

Figure 5: 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 Q4 2023, there were 123 new FDI[27] projects in London (worth £1.3bn in capital expenditure). From 2015-2020, the average was around 150 new projects per quarter (with each quarter averaging £1.7bn in nominal terms).

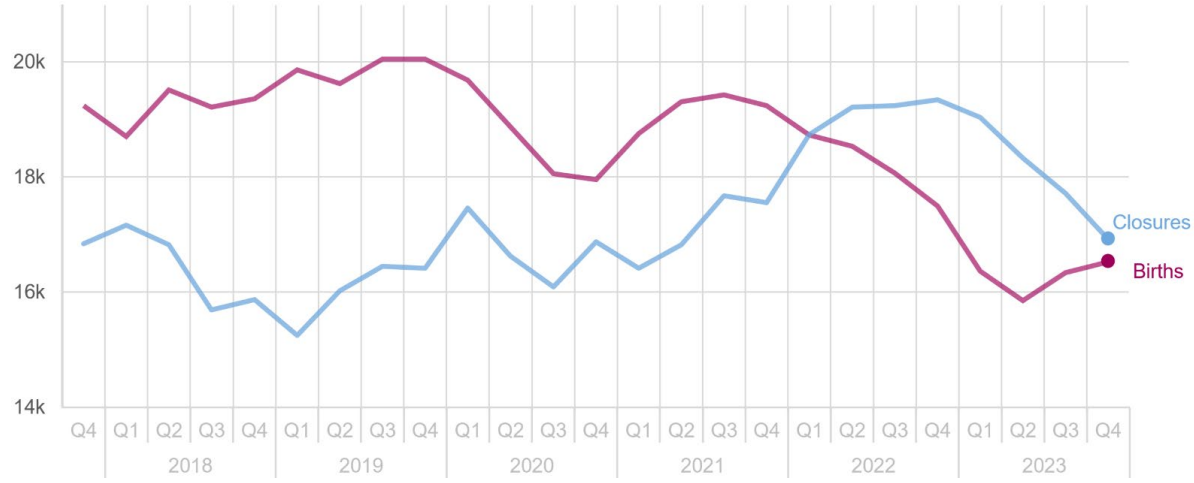
Although these figures are still below pre-pandemic levels, they demonstrate a sustained recovery in FDI. From Q4 2022 to Q4 2023, the compound quarterly growth rate (CQGR) of new FDI projects in London was 8.4% per quarter, while capital expenditure grew by 10.6%.

Compared with other global cities, London remains the leading FDI recipient in Europe[28]. The increase in FDI has created more jobs in the city; for example, new tech FDI projects generated over 4,300 jobs in 2023 - a 40% year-on-year increase[29].

[27] Data sourced from fDi markets live database and subject to revisions. Capex data are estimated values.
[28] London Property Alliance. London eclipses New York, Paris, Berlin and Hong Kong in attracting foreign investment. February 2024
[29] London and Partners. London welcomes 100th international tech company. December 2023

Figure 6: Business births and closures

Births and closures (four-quarter moving average)



Source: ONS Business Demography. Note: experimental data.

In London, business births tended to exceed closures until 2022[30]. Following a dip in births and closures in early 2020, both began to rise from Q4 2020, suggesting greater business churn.

From mid-2021, births started to decrease while closures increased. From Q1 2022 onwards, London has seen more closures than births on a four-quarter rolling basis, reversing the earlier trend. In the year to Q1 2023, London has seen on average about 2,500 more businesses close than open per quarter.

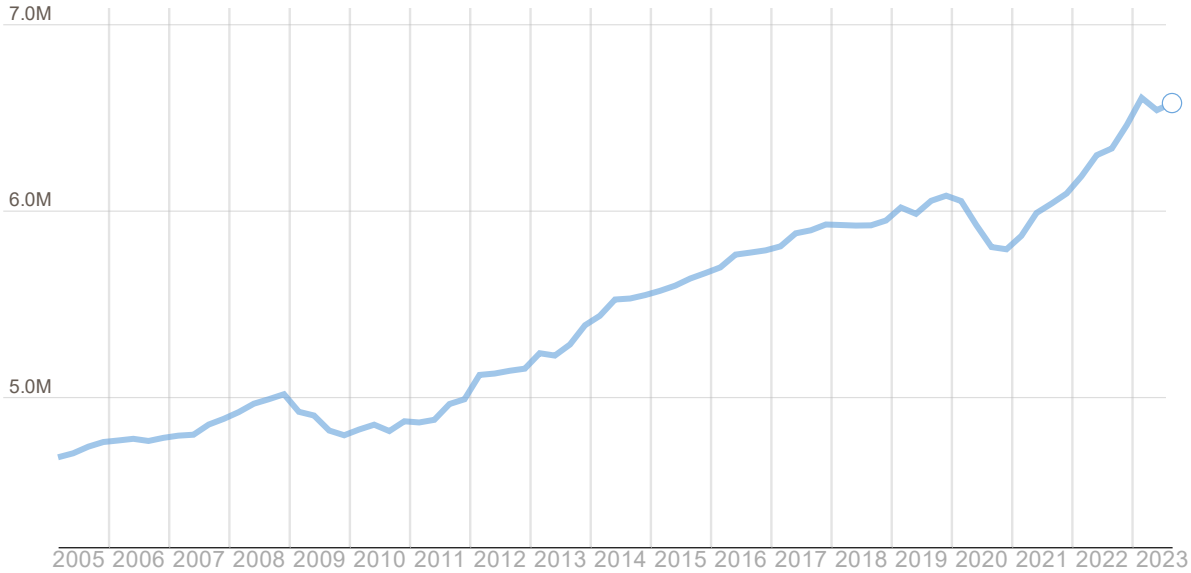
That said, this gap began to narrow in Q4 2022, with births growing again from Q2 2023 and converging to closures as the latter continued to fall.

[30] This is experimental data from ONS and subject to revisions. The data reflect businesses added or removed from the Interdepartmental Business Register.

Jobs

Figure 7: Total Workforce Jobs

Number of jobs (millions), as of September 2023



Source: ONS Workforce Jobs. Note: Sampling variability (95% confidence interval). This is a workplace-based measure. Next update planned for June 2024.

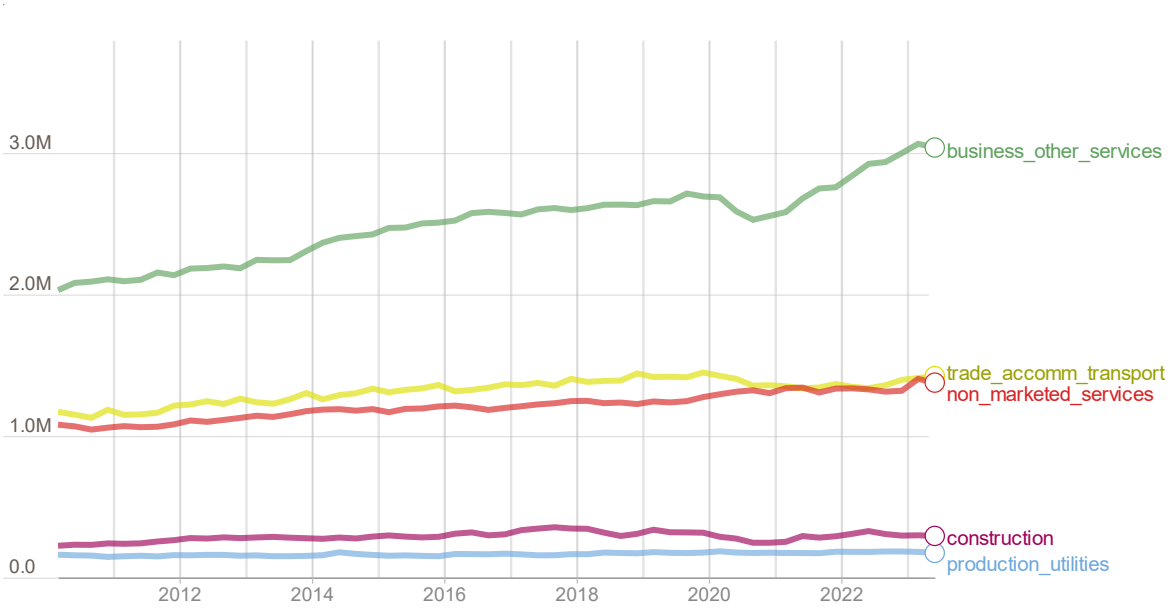
The ONS Workforce Jobs series provides quarterly estimates of the number of jobs and is the ONS' preferred metric for jobs by region and industry. The estimated number of workforce jobs in London was 6.58 million in September 2023, nearly 500,000 more than in December 2019 and a rise of 8.1% over the period.

London accounted for 44% of the UK's workforce job increase between December 2019 and September 2023.

The number of jobs in London fell in Q2 2023, and while it rose in Q3 2023, there were nearly 28,000 fewer jobs in London in September 2023 than in Q1 of that year. These changes were driven by the decrease in self-employment, while the number of employee jobs kept rising.

Figure 8: Workforce Jobs profile by broad sector

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



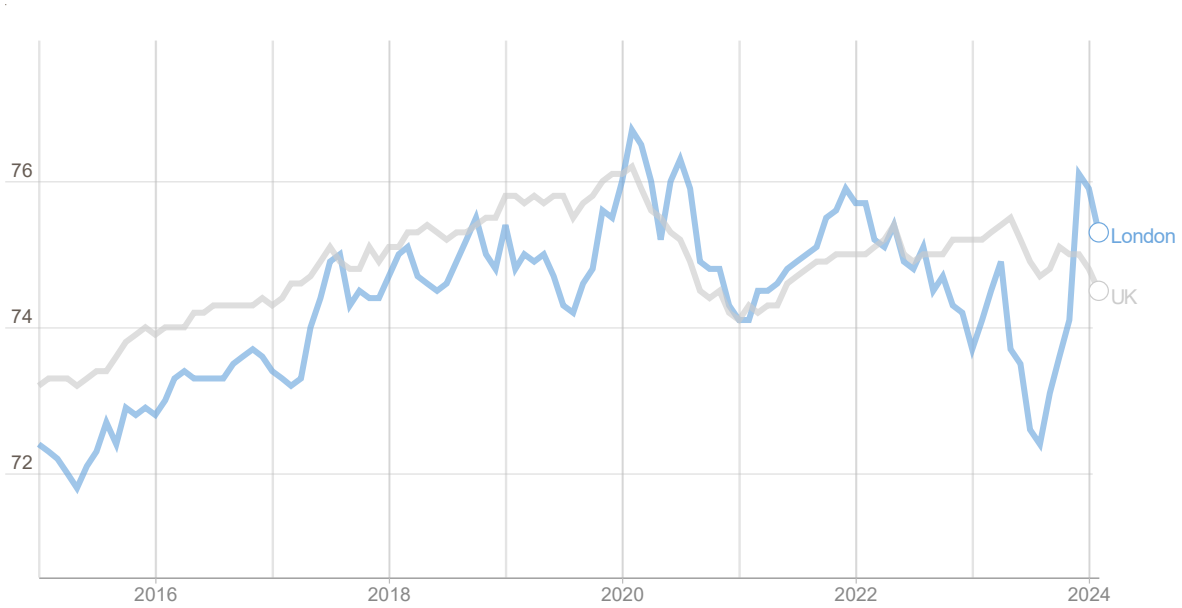
Source: GLA Economics analysis of ONS Workforce Jobs (via Nomis).

Over recent decades, London has transitioned towards services and away from primary industrial sectors. In September 2023, there were 2.98 million jobs in business and other services, accounting for 47% of London's jobs (up from 44% in 2010). Meanwhile, the share of jobs in construction and production and utilities sectors fell.

London's industry mix has also evolved since the pandemic. The 'business and other services' sector continued to grow, with jobs up 11% since December 2019. Jobs in non-marketed services (health, education, public administration) are 9% above pre-pandemic numbers. The trade, accommodation and transport groups are now above pre-pandemic levels due to a strong recovery since mid-2022. Production and utilities jobs are down 4% on pre-pandemic levels, while the construction sector is down 12%.

Figure 9: Employment rate

% aged 16-64, latest data for period December 2023-February 2024



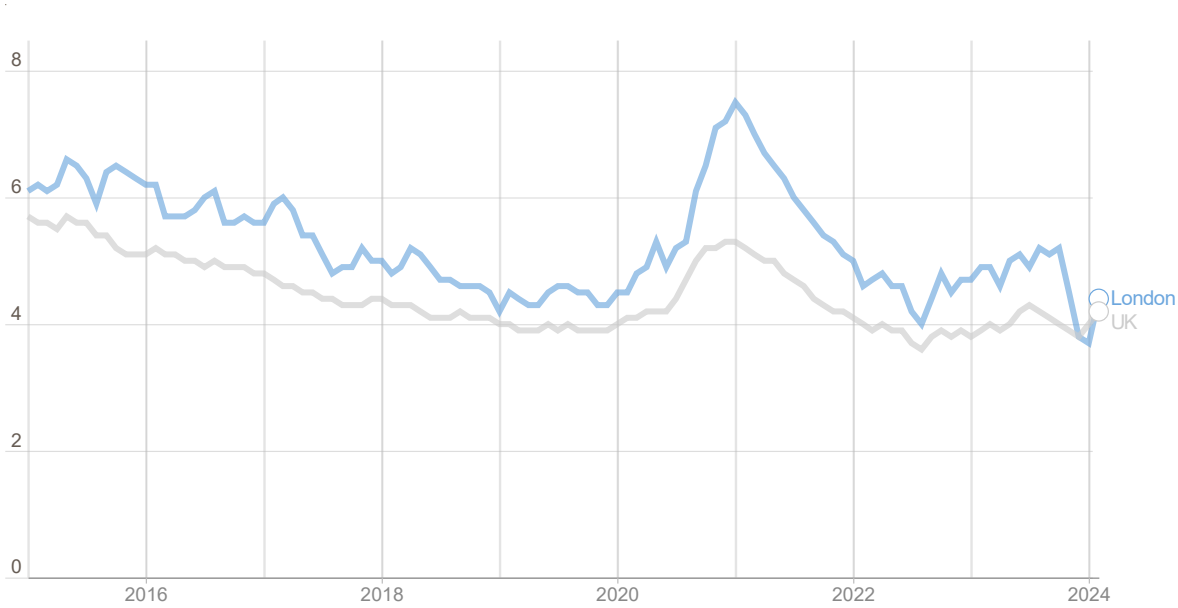
Source: ONS Labour Force Survey. Note: the margin of error is +/- 1.9% for London and +/- 0.6% for the UK.

ONS publications of regional labour-market data have been disrupted since September 2023 due to methodological issues. Although the ONS has since resumed publishing data, they remain volatile, and estimates should be treated with caution.

The employment rate is the proportion of people aged 16-64 years who are in paid work or temporarily away from a job. For the three months to February 2024, the rate in London was estimated at 75.3%, a 1.2 percentage point (pp) increase on the previous quarter and on the same time last year. London's employment rate was also higher than UK's (74.5%).

Figure 10: Unemployment rate

% economically-active population, latest data for period December 2023-February 2024



Source: ONS Labour Force Survey. Note: the margin of error is +/- 1.1% for London and +/- 0.3% for the UK.

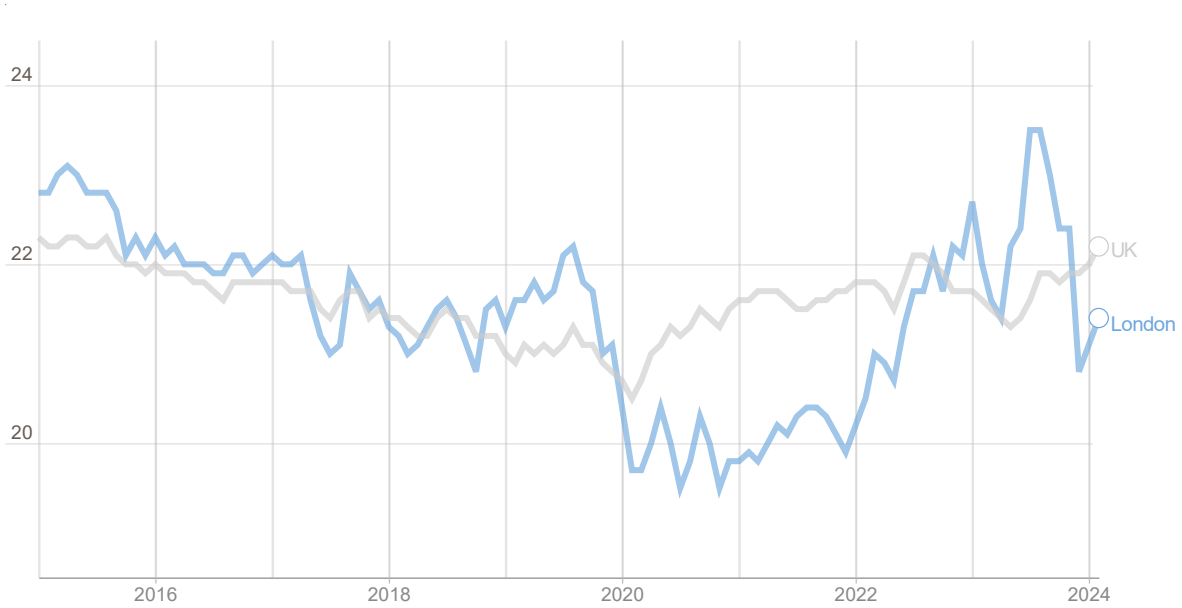
Unemployment refers to jobless people who have been actively seeking work within the last four weeks and are available to start work within the next two weeks. The London unemployment rate has been particularly volatile in recent months.

For December to February 2024, the unemployment rate for London was estimated at 4.4%. It constitutes a decrease of 0.1pp on the previous quarter and 0.6pp from a year earlier. It is slightly higher than the UK unemployment rate (4.2%).

It is worth adding that claimant counts were up by 1.9% in the month up to March 2024, by 9.8% on the year, and by 67% from March 2020 (to reach 313,000 claimants).

Figure 11: Economic inactivity

% aged 16-64, latest data for period December 2023-February 2024



Source: ONS Labour Force Survey. Note: the London margin of error is not published; the UK margin is +/- 0.6%.

The 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 with caring responsibilities, and those too ill to work.

For the three months to February 2024, the rate of economic inactivity in London was estimated at 21.4%, 1pp down from the previous quarter and 0.6pp down from a year earlier. There were around 1.3 million inactive working-age Londoners, a slight rise from pre-pandemic levels (1.28 million). In the three months to February 2024, the UK rate (22.2%) was higher than London's.

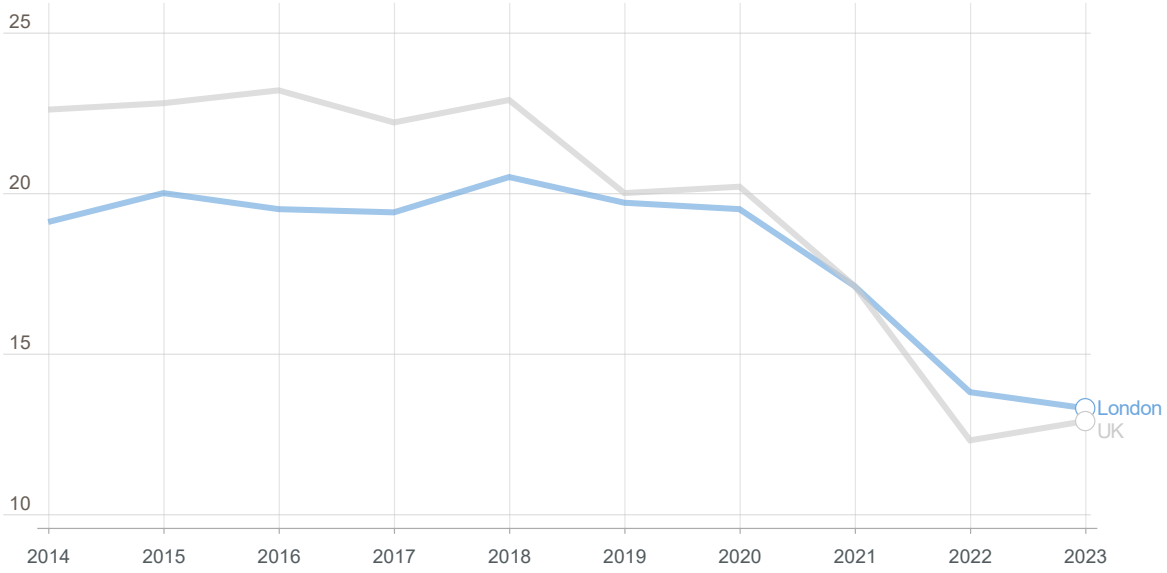
Although London's inactivity rate reached a ten-year high in mid-2023, it has since returned to pre-pandemic levels. With regard to the rise in inactivity between 2020 and 2023, the pandemic induced involuntary job losses, increasing the share of people looking for a job amongst the jobless population.

Moreover, Annual Population Survey data shows that although long-term sickness in London has risen as a share of those who are economically inactive, it has been stable as a share of London's total 16-64 population.

Looking at inactivity by demographic group, London's women experienced falling inactivity due to increased employment. The share of women aged 16-64 who were inactive due to unpaid household work dropped from 15% in 2005 to 8.4% in 2021. That said, there has been a slight increase (to 9%) in 2023.

Figure 12: Employee jobs below the LLW & UKLW

% of employee-jobs in London paid less than London Living Wage (LLW) vs % of employee-jobs UK-wide paid below UK Living Wage (UKLW)



Source: ONS. Note: 2023 data provisional.

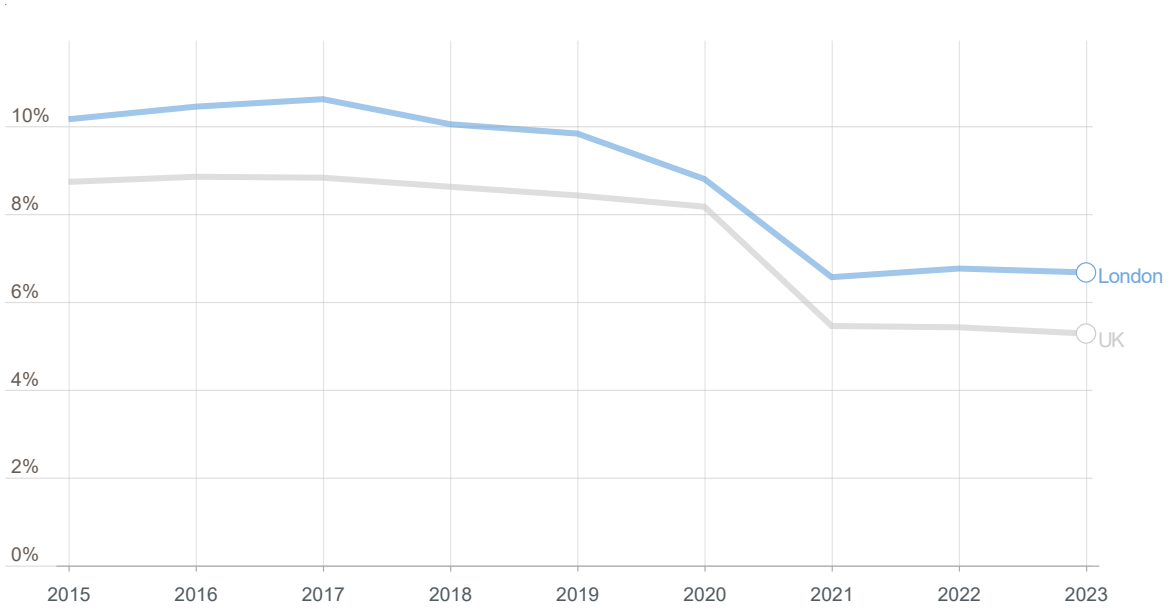
The London and UK Living Wage rates are calculated annually by the Living Wage Foundation and are based on actual living costs. Generally, Living Wage rates tend to increase faster than inflation and nominal pay rises, although inflation has risen more sharply recently, especially during 2021 and 2022.

Approximately 13.3% of employee-jobs in London were paid below the LLW in April 2023, a higher share than the UK's (12.9%). London's rate only started exceeding the UK's from 2022.

The proportion of London employees earning below the LLW remained broadly stable throughout the late 2010s. Between 2020 and 2022, the number of low-paid jobs decreased sharply, coinciding with wider job losses during the pandemic that disproportionally affected low-pay sectors. The slowdown has since stabilised, but the share remains 5.8pp lower than back in 2015.

Figure 13: Workers in insecure employment

% of workers in insecure employment by place of residence



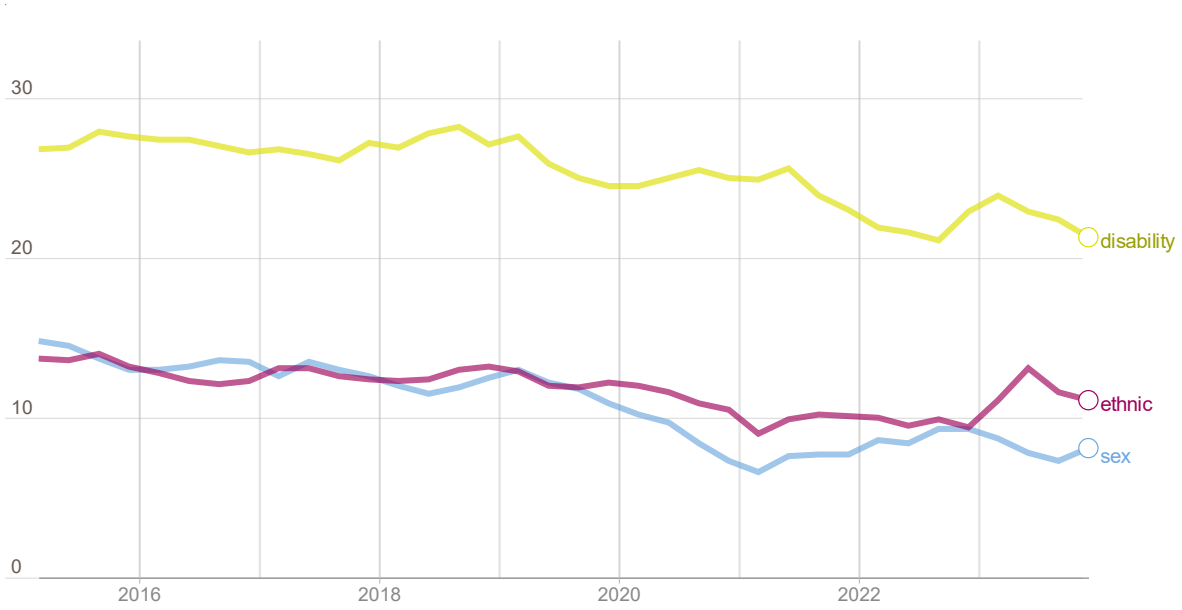
Source: ONS Annual Population Survey.

The measure of insecure work used here covers those 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.

The share of people living in London who are in insecure employment has been broadly stable in recent years: 6.6% in 2021, 6.8% in 2022, and 6.7% in 2023. This compares to much higher rates (above 10%) before 2018. However, the London share remains higher than the UK's (5.3% in 2023).

Figure 14: Employment rate gaps

Percentage point difference, latest data for January-December 2023



Source: ONS Annual Population Survey.

The employment rate gaps show the difference in employment rate for Londoners aged 16-64 in one group and that for another. The latest gap between all white Londoners and Londoners from all other ethnic backgrounds rose sharply for the period January-December 2023 and now stands at 11.1pp. This gap had been falling between the mid-2010s and the pandemic, but stabilised before rising again. The gap in London is bigger than the UK's (7.6pp).

The gap between Londoners with and without disabilities in 2023 was 21.3pp. This is below the national gap (25.9pp) and has been decreasing over time – although it remains the widest gap across the characteristics examined here.

Finally, the male/female gap in London dropped to 8.1pp in 2023. It has generally been decreasing since 2015, but rebounded after the pandemic and remains above the national gap (7.1pp).

Skills

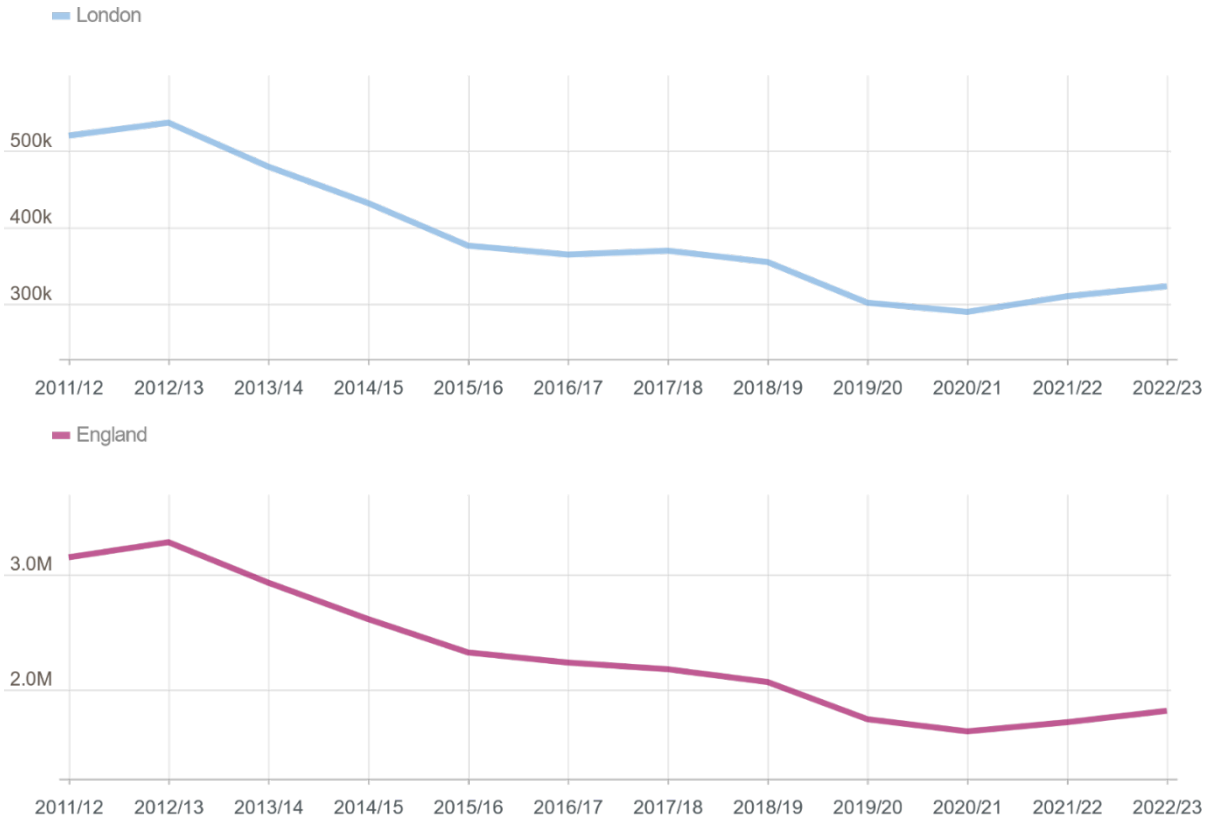
Figure 15: Proportion of people with Level 4 or above qualifications and with no qualifications in London

% aged group 16-64, latest data for Jan 2023-Dec 2023

Source: ONS Annual Population Survey, 2014-2023. Notes: From 2022, the qualification framework presented in the data moved from National Vocational Qualifications (NVQ) to Regulated Qualification Framework (RQF)

In London, the proportion of people with higher-level qualifications increased over time. In 2023, the share of Londoners with a level-4 or above qualification was 61%, up from 49% in 2014. While there is some variation across London, the share of the capital's population aged 16-64 years with no formal qualifications declined from 8% in 2014 to 5% in 2023.

Figure 16: Further education and skills participation, London and England 2011/12 to 2022/23



Source: Department for Education

Since 2017, participation[31] in Further Education (FE) and skills training among adults (aged 19+) has fallen sharply across both London and England. This trend was exacerbated by the pandemic. There has been an improvement in participation since the devolution of the Adult Education Budget in 2019. Participation in London increased from 310,250 to 323,310 between academic years 2020/21 and 2022/23.

The half-year data for 2023/24 (not shown in Figure 15) reveals that participation in London reached 233,900, or 72% of the 2022/23 figure, by January 2024. Thus, participation is expected to be in line with or higher than in 2022/23, and the same trend applies for England.[32]

[31] Participation refers to the number of people who attended one day or more on a learning aim in a given academic year. Any learner studying more than one aim, at the same provider at the same level, is counted once at that level.

[32] For further information see the DFE data publication

Figure 17: Sustained positive destinations (SPD) of education and training learners

Greater London Authority 2016/17 - 2020/21

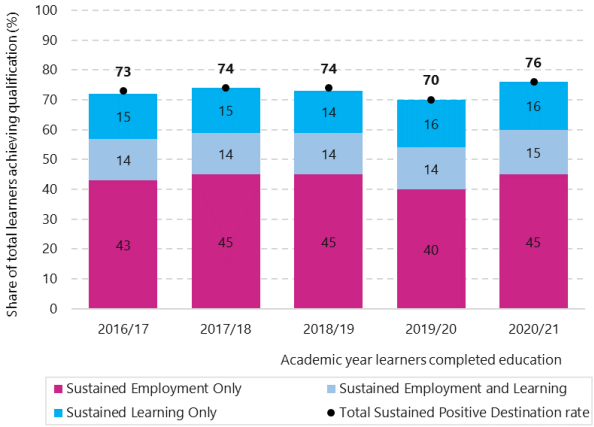
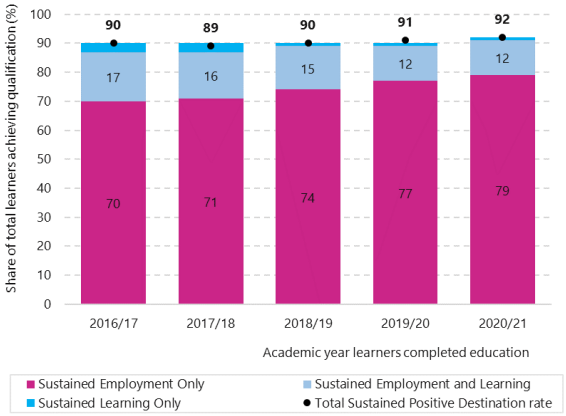


Figure 18: Sustained positive destinations (SPD) of apprenticeship learners

Greater London Authority, 2016/17 - 2020/21



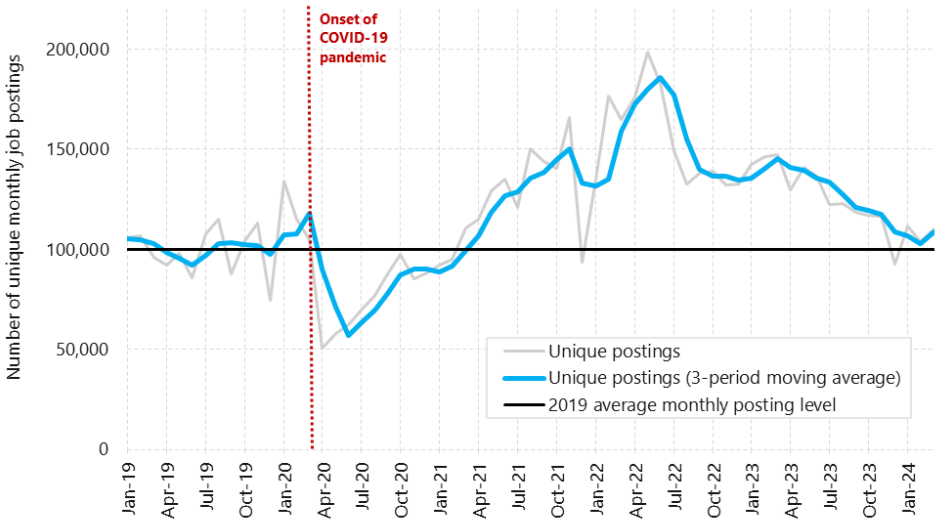
Source: Department of Education. Note: SPD shows unconditional association between qualifications and outcomes. Differences might be explained by learner characteristics or labour market conditions, for instance.

The latest available data on labour market outcomes of London's FE learners show that for both 'adult education and training (19+)' and 'apprenticeships', the share of 2020/21 learners recorded as having an SPD for at least a 6-month period in the following year (2021/22) is at the highest level it has been in recent years (76% and 92%, respectively).

Increases in sustained employment have been responsible for improvements in overall SPD rates since the pandemic. For both learner cohorts, the majority of learners with an SPD are recorded as being engaged in employment post-achievement, particularly in the case of apprenticeships (79% in 2020/21).

Figure 19: Online job postings

All occupations, London, January 2019 to March 2024



Source: Lightcast 2024.

An indicator of labour demand in London, online job postings increased sharply post-pandemic, in line with widescale societal reopening and resurgent economic activity. However, since the latter half of 2022, job-posting numbers have been trending back to pre-pandemic levels.[33]

Lightcast data also provides insights into common and specialised skills that are sought after by employers in London. The common or transferable skills most in demand during Q1 2024 included communication, management and customer service. Similarly, the technical or specialised skills most in demand included core business skills such as project management, finance and marketing.

[33] Further details can be found in the Quarterly Online Job Posting analysis report.

Figure 20: Top 10 most in demand common skills

Frequency in job postings (%), London, January-March, 2019 vs. 2024

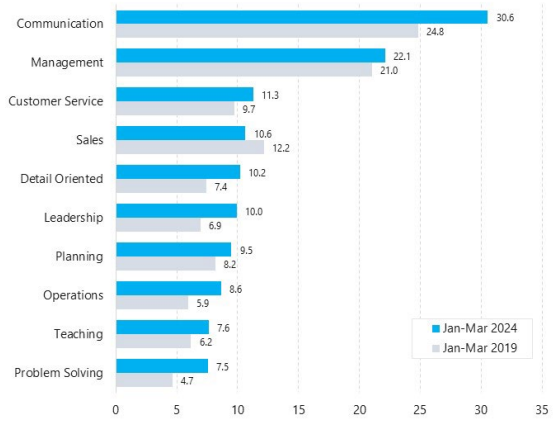
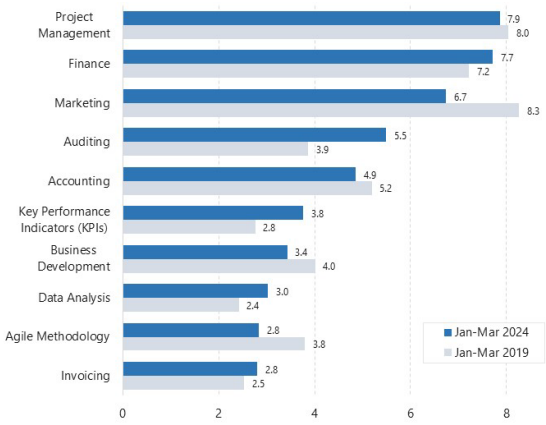


Figure 21: Top 10 most in demand specialised skills

Frequency in job postings (%), London, January-March, 2019 vs. 2024



Source: Lightcast 2024.

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 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).

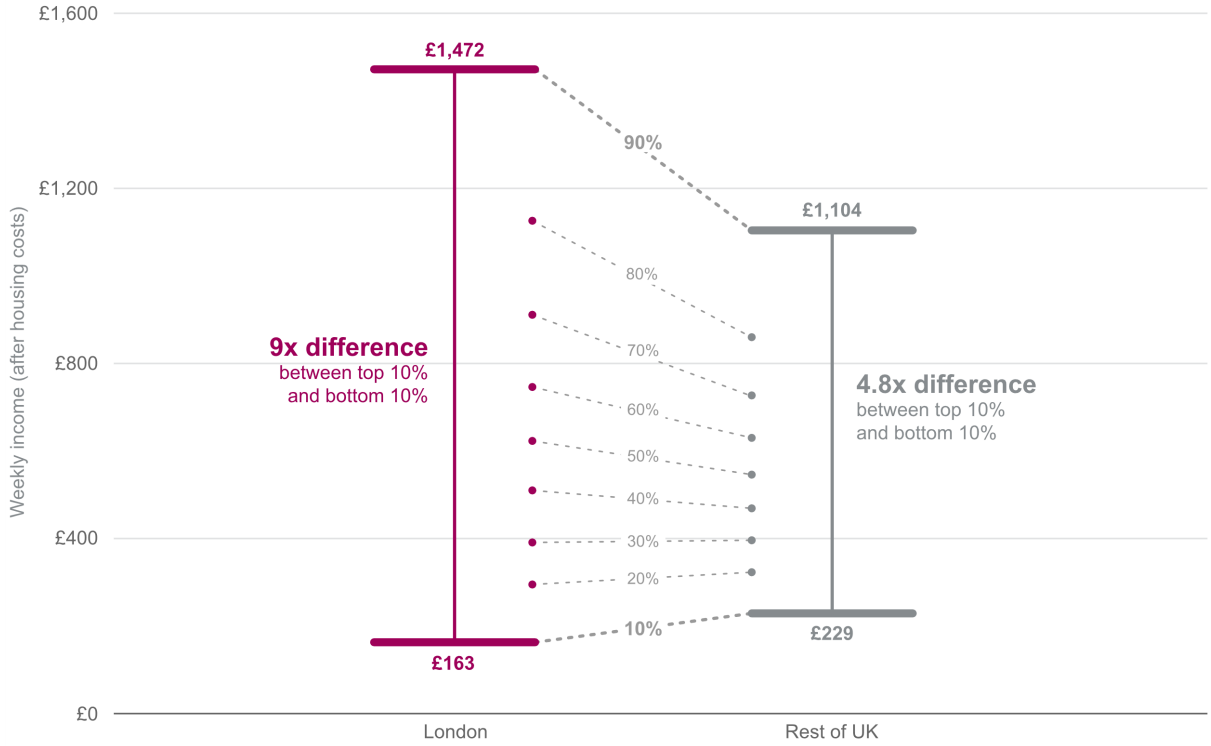
The definition used here is equivalised net income after housing costs. This allows us to compare the income available to people living in different households after paying direct taxes (income tax and National Insurance) and housing costs (including rent, mortgage, and Council Tax). This is sometimes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

The indicators look at the income distribution and inequality, 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, 2020/21-2022/23

Difference in weekly income (after housing costs) between top and bottom 10%



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
Chart: GLA Intelligence

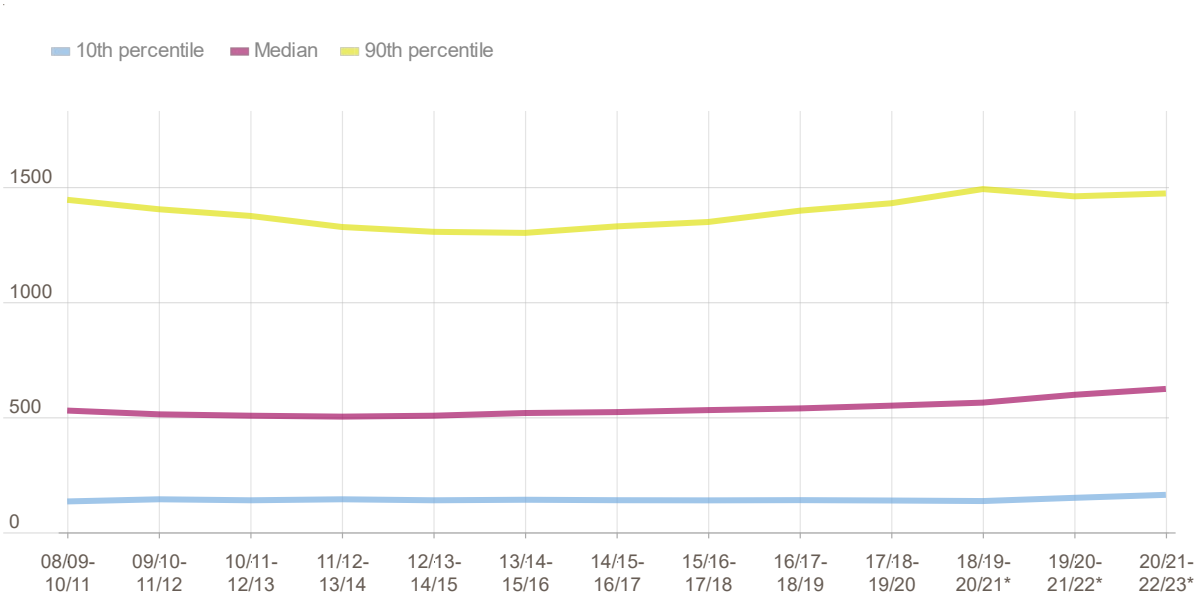
While "typical" incomes in London have, in the past, been only a little higher than elsewhere in the UK, in recent years the difference has grown so that Londoners' incomes are now around 14% greater. Median equivalised income after housing costs for a couple in London was £623 per week for 2020/21-2022/23[34], compared to £546 for the rest of the UK.

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

Incomes for Londoners at the lowest decile are around 30% below those at the lowest decile for the rest of the UK, while incomes at the highest decile are around 30% higher. Overall, the ratio of income at the top to bottom decile (known as the 90:10 ratio) is 9.0 for London, nearly twice that for the rest of the UK (4.8).

[34] Regional data for 2020/21 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[35] median equivalised income AHC indexed to 2022/23 prices

Income after housing costs at the lowest decile in London has been stable in real terms for more than a decade, though it has increased sharply in the last two years, with the latest estimate being £163 per week.

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 and peaking at 11.0 in 2018/19-2020/21 and then falling again; the latest estimate is 9.0.

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 to data collection issues during the pandemic.

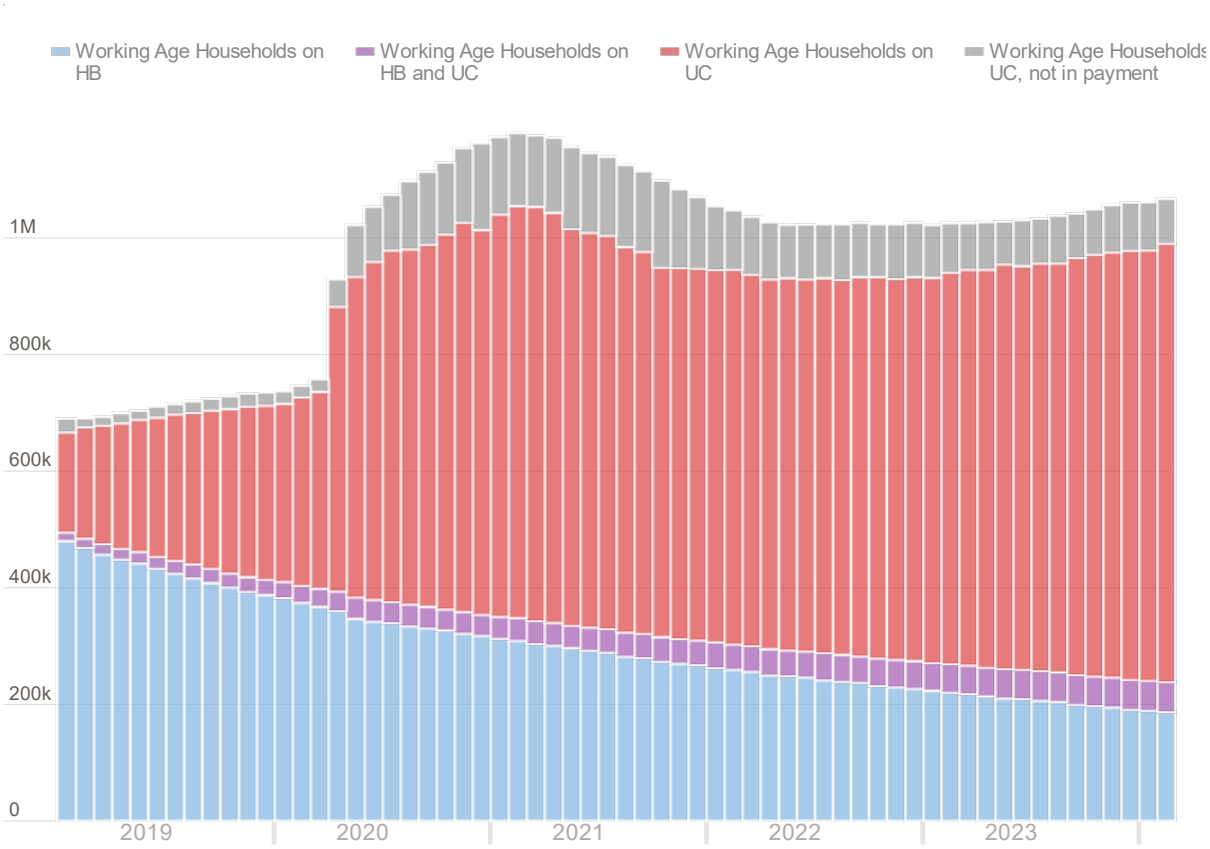
Administrative data on means-tested benefits can be used to give a timelier proxy. Data on Universal Credit (UC) claims can be combined with data on Housing Benefit (HB) claims to provide a broader view, although some people are still moving across to UC from other, older legacy benefits. UC is only 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.

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

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 to achieve a healthy lifestyle.

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

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



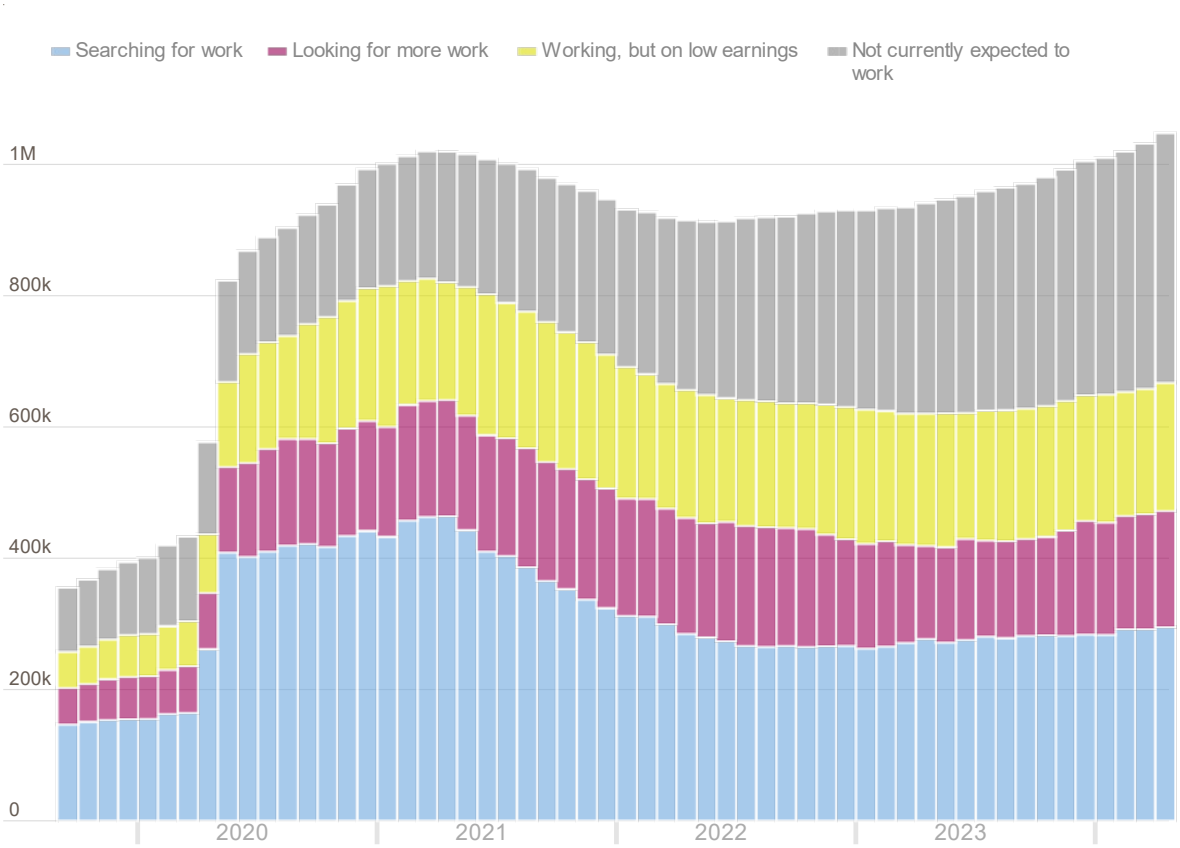
Source: DWP Benefits data via Stat-Xplore

Figure 3 shows that by February 2024, the numbers of households in London with working-age adults claiming one or both of the main means-tested benefits had been stable since the end of the Coronavirus Job Retention Scheme in Autumn 2021, though they have been rising in recent months, with around 1.06 million households claiming UC and/or HB per month but around 990,000 receiving a payment. Within that total, the number claiming HB is reducing over time. Around two-thirds of claimants are single without children, while around one in six are lone-parent households.

Around 25,000 London households had their payments capped in November 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 decreased between August and November 2023.

Figure 4: Londoners claiming Universal Credit by work status

Summarised work conditionality status of people on Universal Credit, Sept 2019-Apr 2024



Source: DWP Benefits data via Stat-Xplore

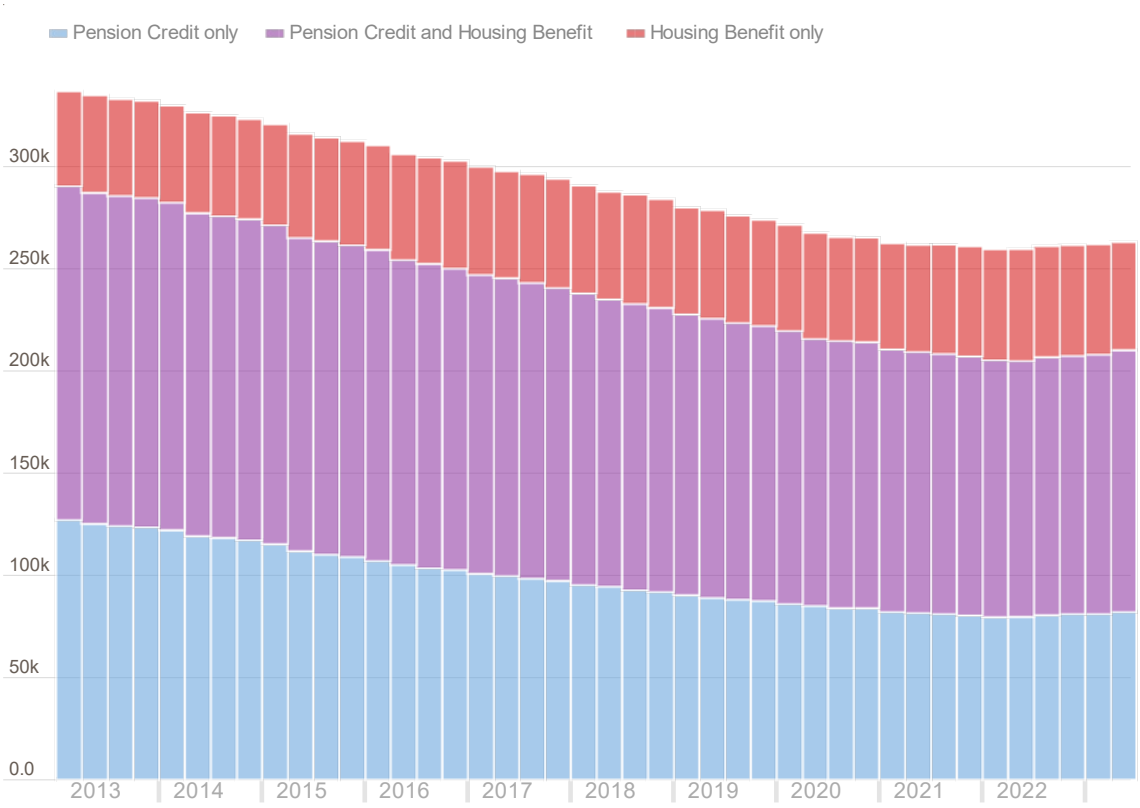
The reduction in number of UC claimants in London seen to mid-2022, from the height of the pandemic, has reversed, climbing back to over one million in April 2024, and is 11% higher than the same month a year prior. It is now also higher than it was at the highest peak during the pandemic. Within this, there were rising numbers of claimants out of work and searching for work[36], while there has been an uptick for those seeking additional work.

The number of claimants not expected to work accounts for the majority of the increase since mid-2022 (82%), which likely reflects changes in the welfare system (as UC replaces previous benefits), rather than solely being due to a real increase in numbers.

[36] This is only part of the total of unemployed Londoners. See the Economy and Labour Market Chapter. Those claiming the new style Jobseeker's Allowance tend to have 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. Some of this is due to the change in State Pensionable Age (SPA). However, the change in SPA does not account for the entire decrease in PC claimants. Almost a third of pensioners[37] in 2013 claimed PC and/or HB, but this decreased to a quarter in 2022. The numbers have risen marginally since mid-2022. There is no data available after the May 2023 quarter as DWP have suspended State Benefit statistics and they remain suspended at the time of this publication[38].

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[39].

---

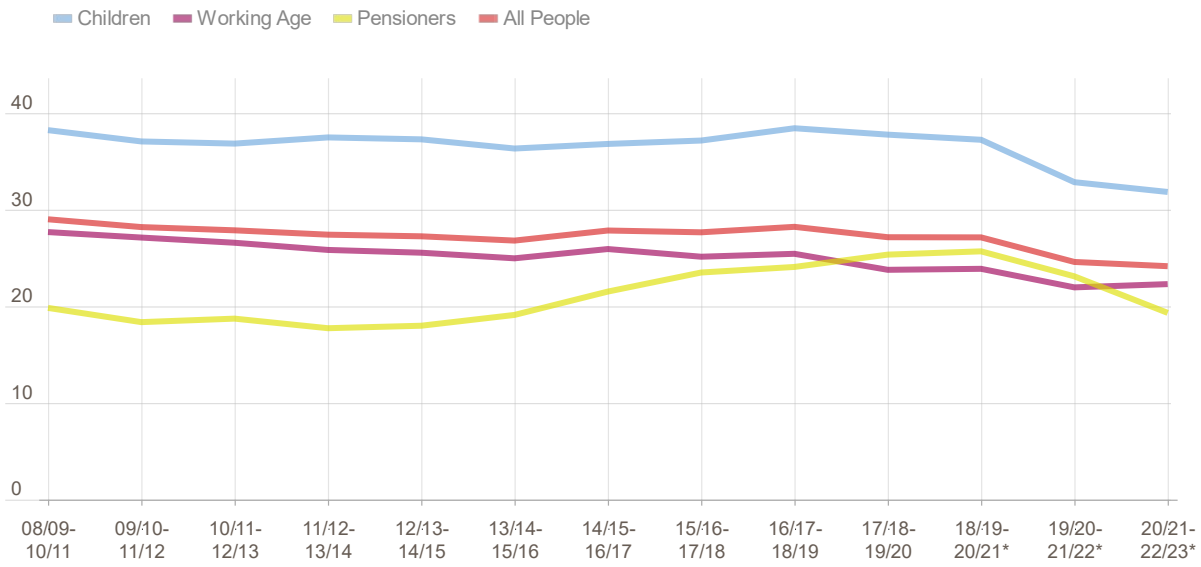
[37] All people of state pensionable age on the DWP database receiving at least one benefit, which may include State Pension. Not all residents over SPA are claiming benefits, so this is not a full count of the resident population aged over SPA.

[38] https://www.gov.uk/government/collections/dwp-statistical-summaries

[39] 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 again in the latest estimate (24% of the population, or about 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 [40].

Since poverty in London has decreased in recent years, this has meant that it is no longer the region[41] with the highest proportion of residents in poverty, with the West Midlands and North West showing higher poverty incidence.

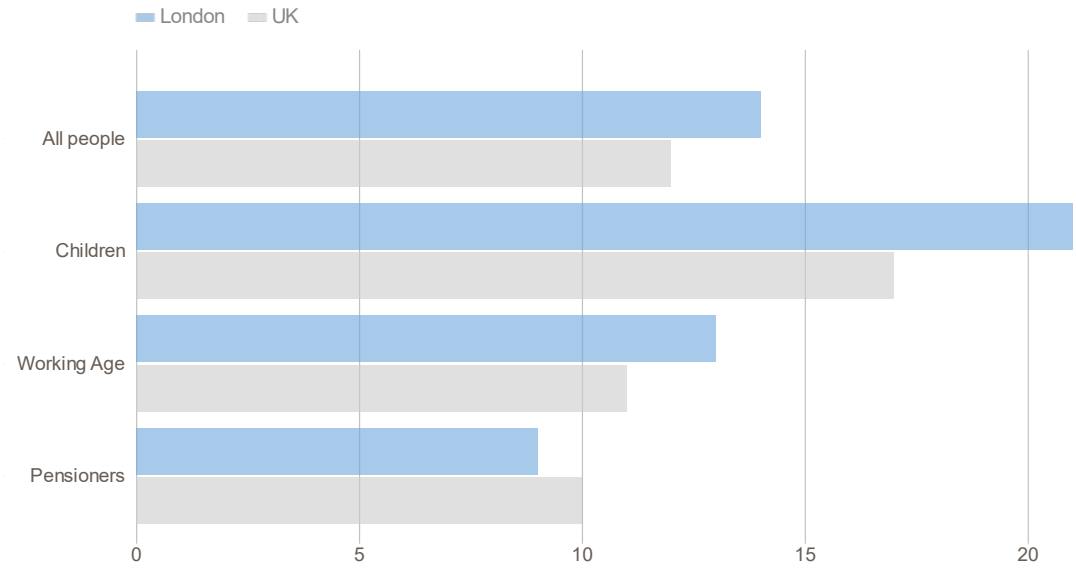
The proportion of London's children living in poverty has generally been higher than elsewhere in the UK, but the latest estimates show a further drop to 32% in London and decreases in many other regions. The child poverty rate also decreased in Inner London, but at 37% remains relatively high.

Meanwhile, poverty rates among London's pensioners had been climbing prior to the pandemic but have dropped again in the latest estimate. Pensioner poverty rates for London used to be higher than in other UK regions, but in the latest estimates, Yorkshire and the Humber now show higher poverty incidence among this group.

[40] Due to difficulties conducting surveys during the pandemic, there is greater uncertainty in all estimates, so it is not possible to ascertain whether changes reported are genuine.
[41] Regional data for 2020/21 are not available, so the estimates including that year are averages of the two remaining time points.

Figure 7: Persistent poverty

Percentage in persistent poverty after housing costs (2018-2022)



Source: DWP Income Dynamics

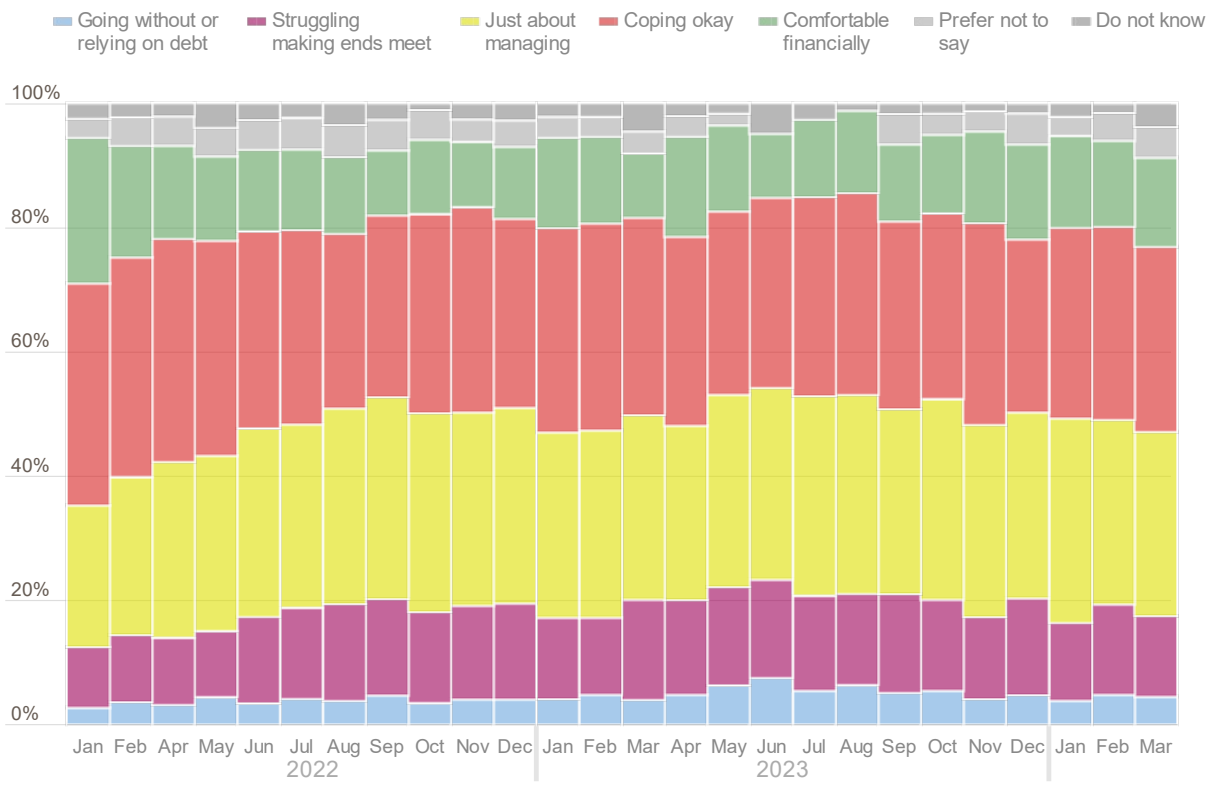
Around one in seven Londoners were classed as in persistent poverty between 2018 and 2022[42]. Around two-thirds (64%) of London's children in poverty are in persistent poverty – or 21% of all children (approximately 400,000). This is much higher than for the UK, and pushes the proportion of Londoners in persistent poverty above the national average.

The proportion of working-age Londoners in persistent poverty has been fairly stable and remains above the national level. The proportion of pensionable-age Londoners in persistent poverty fell sharply in the latest estimates, and is now below the national level for the first time since data started being collected.

[42] 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-Mar 24



Source: YouGov survey January 2022 – March 2024

All figures, unless otherwise stated, are from YouGov Plc for the GLA. Monthly sample sizes were between 968 and 1,320 adults. Surveys were carried out online. Figures have been weighted and are representative of all London adults (aged 18+).

When asked how they were coping financially in March 2024, 44% 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 proportion who said they were struggling financially (17%)[43] has decreased since June 2023 (23%), while around three in ten (30%) Londoners reported they were just about managing.

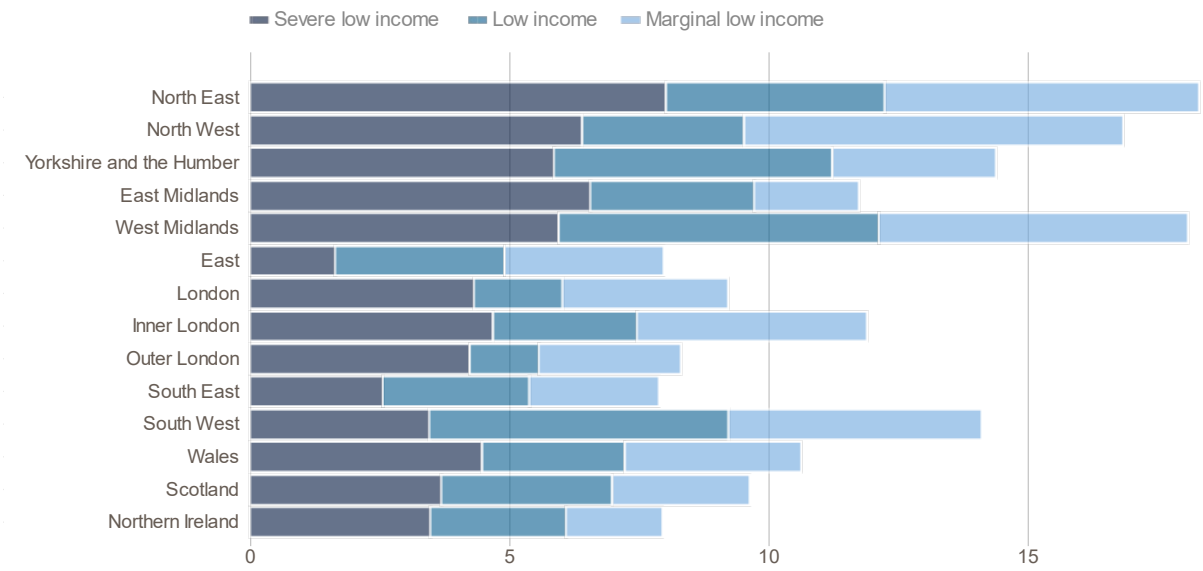
Higher income groups, homeowners and higher social grade[44] Londoners were least likely to say they were struggling financially. Meanwhile, those aged 18-24 were least likely to be financially comfortable. Unemployed Londoners, lower income groups, renters, people from lower social grades, Black Londoners and those with a limiting health condition or disability were more likely to report struggling financially.

[43] Defined as going without or relying on debt to pay for their basic needs or struggling to make ends meet.
[44] A category used in the ONS 'Approximated Social Grade' variable.

'Financially struggling' Londoners are significantly more likely than other Londoners to be doing the top two actions to manage costs, to be spending less on non-essentials and to buy cheaper products.

Figure 9: Material deprivation among children

Percentage of children who experience material deprivation and low income by region



Source: DWP Households Below Average Income 2020/21-2022/23[45]*,*

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.

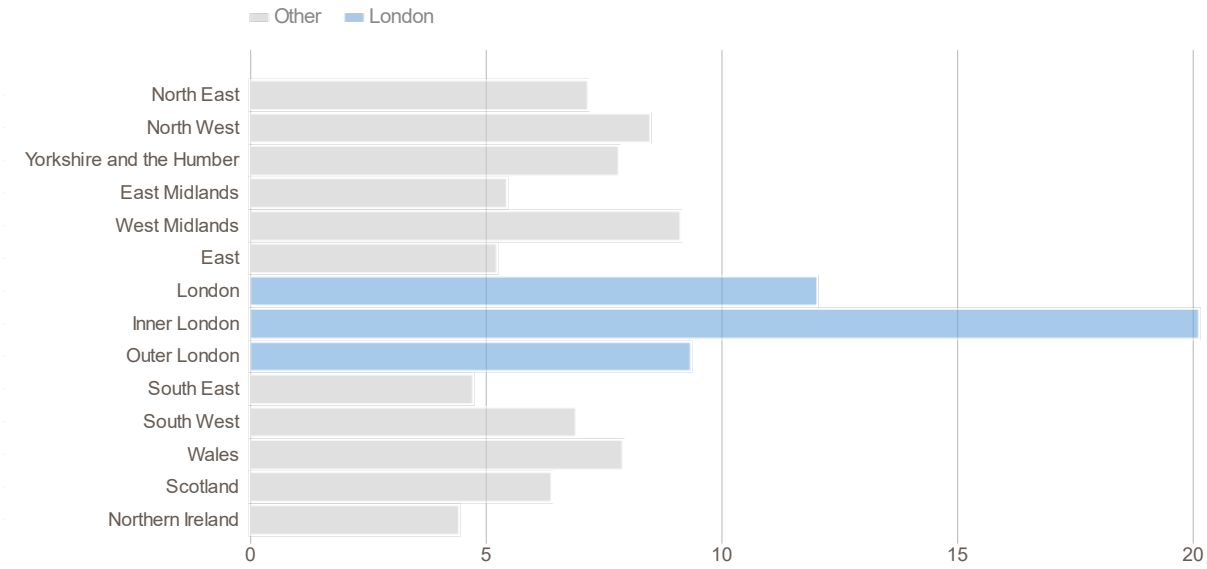
For children, such items include fresh fruit and vegetables, school trips, and not being able to heat the home. Not being able to afford about five from a list of 21 items is considered material deprivation.

At 6%, the proportion of London's children in material deprivation and living in a household with low income (before housing costs) is lower than that in most other regions except for the South East and East of England.

[45] Regional data for 2020/21 not available, so 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



Source: DWP Households Below Average Income 2020/21-2022/23[46]

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

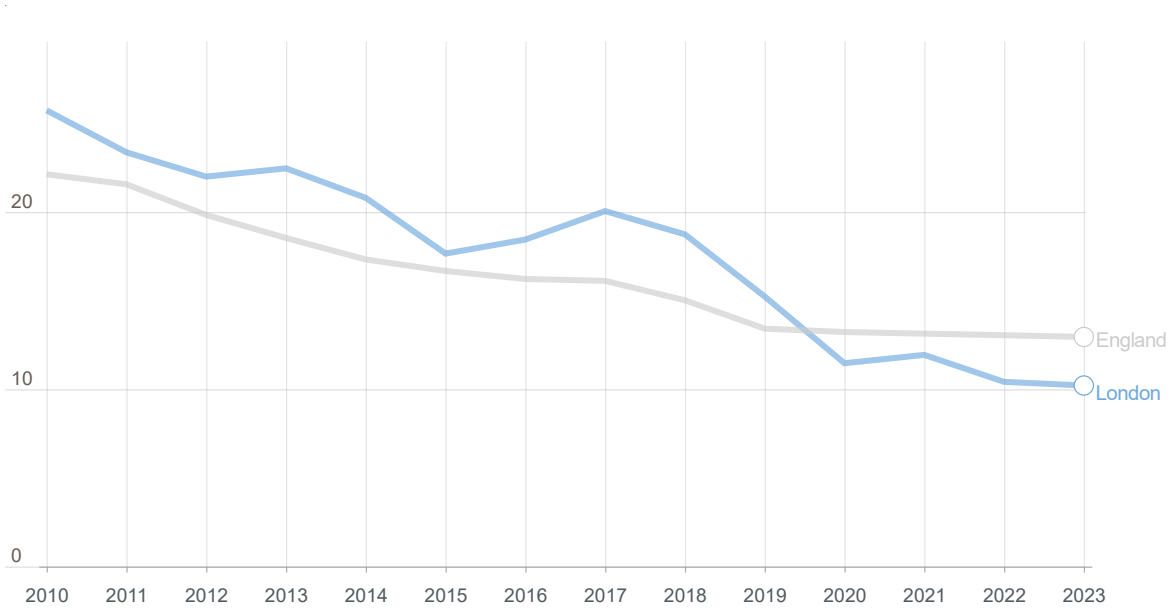
The Joseph Rowntree Foundation defines destitution as going without the essentials we need to eat, stay warm and dry (i.e., warm shelter), and keep clean. Shelter is discussed in the chapter on housing. This section looks at:

- 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).

[46] 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 2023



Source: Department for Energy Security and Net Zero 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. The new definition replaces the previous dataset.

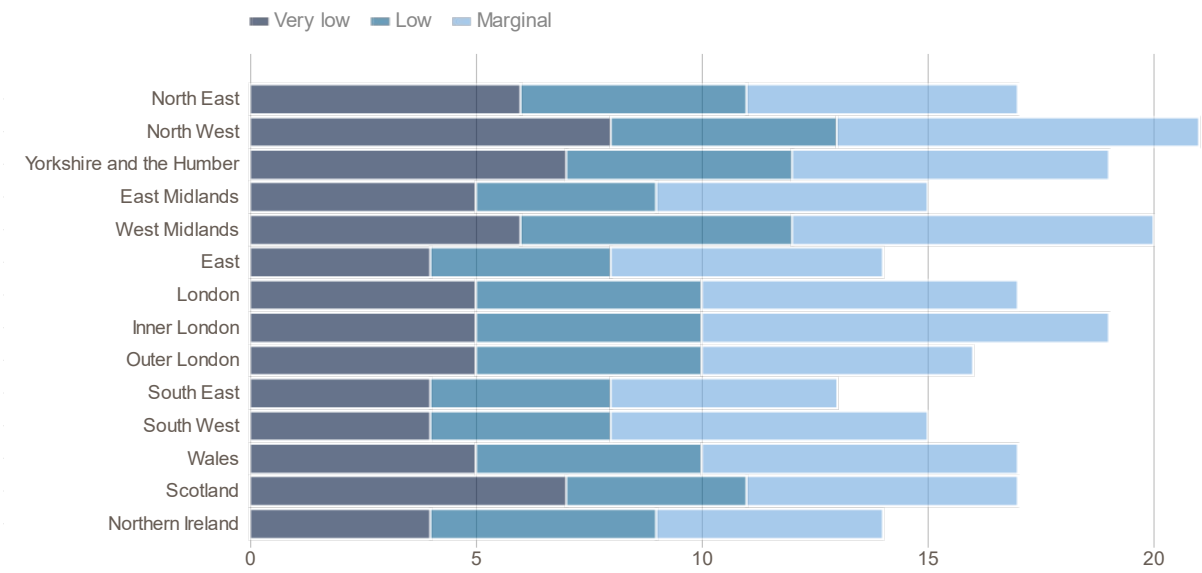
The latest definition of fuel poverty[47] refers to low-income households that are in low energy-efficiency housing. By this measure, fuel poverty decreased nationally during the 2010s but has been stable since 2020. Having fallen below the national level in 2020[48], fuel poverty in London continues to be below national levels in 2023[49].

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 from 2022, hit people living in low-income households the hardest, particularly those in rented accommodation.

[47] Used by the Department for Energy Security and Net Zero.
[48] 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.
[49] Data for 2023 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 2022/23*

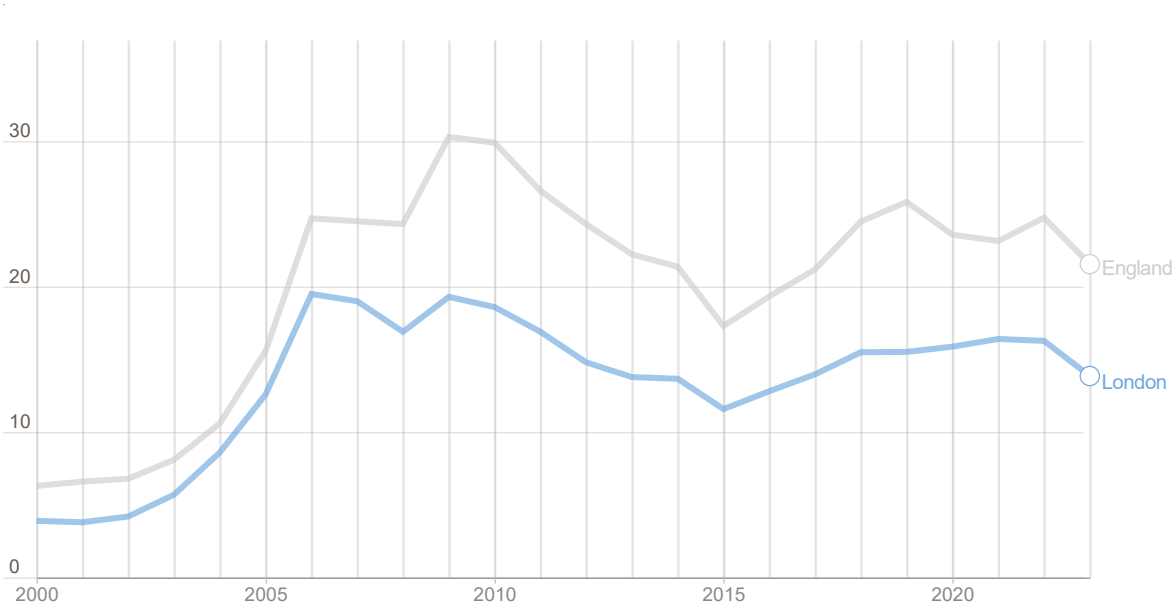
Although 83% of households in London had high food security[50] in 2022/23, 10% were classed as food insecure. The North West was the region with the highest levels of food insecurity (13%)[51]. Furthermore, in 2022/23, 3% of households in London had used a food bank within the last 12 months though, similar to food insecurity, the North West was the region with the highest rate of food bank use in the last 12 months (5%).

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 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[52].

[50] The Family Resources Survey asks a series of questions about access to food over the last 30 days to derive this measure. There are still difficulties conducting the survey after the pandemic, which means that there are higher levels of uncertainty with the figures than usual.
[51] Rounded figures used, so figures shown in the chart may not sum to those quoted.
[52] https://data.london.gov.uk/dataset/survey-of-londoners-2021-22

Figure 13: Debt and Personal insolvencies

Insolvencies per 10,000 population



Source: The 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 fewer than 9,700 individual insolvencies in London during 2023 (less than 14 per 10,000 adult population) - far lower than in any other region of England and Wales and about 15% lower than in 2022.

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.

Housing supply in London has not kept up with demand, which has contributed to the city's very high housing costs: the median price of homes sold in London in the year to February 2024 was £517,000, while the average private rent was £1,960 per month in the year ending March 2024.

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 included here range from monthly to quarterly and have been 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

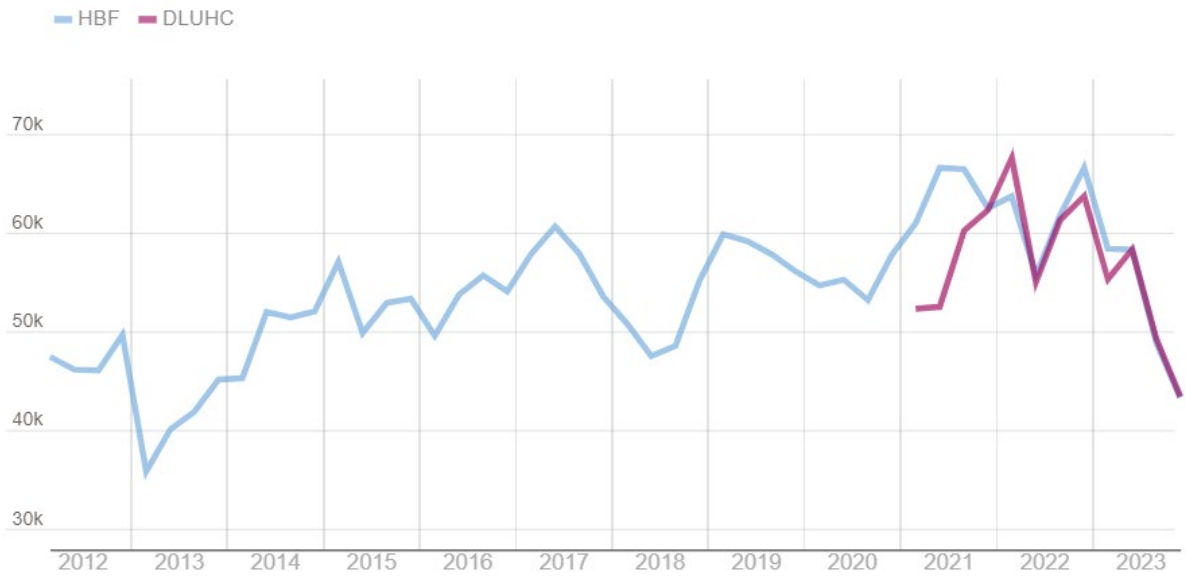
An early indication of the trend in new supply is given by quarterly Department for Levelling Up, Housing and Communities (DLUHC) figures on the number of Energy

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 34,013 EPCs issued for new homes in London in the year to March 2024, down 11% from 38,522 the year before and the second lowest annualised figure since 2015, with the lowest figure recorded in the year to December 2023. However, it should be noted that this fall reflects broader market trends, and is not unique to London. The housebuilding industry across the country 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 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 on the annualised number of new homes given planning permission on a quarterly basis, and according to their most recent figures, there were 43,400 new homes approved in London in the year to December 2023, down 30% from the year before.

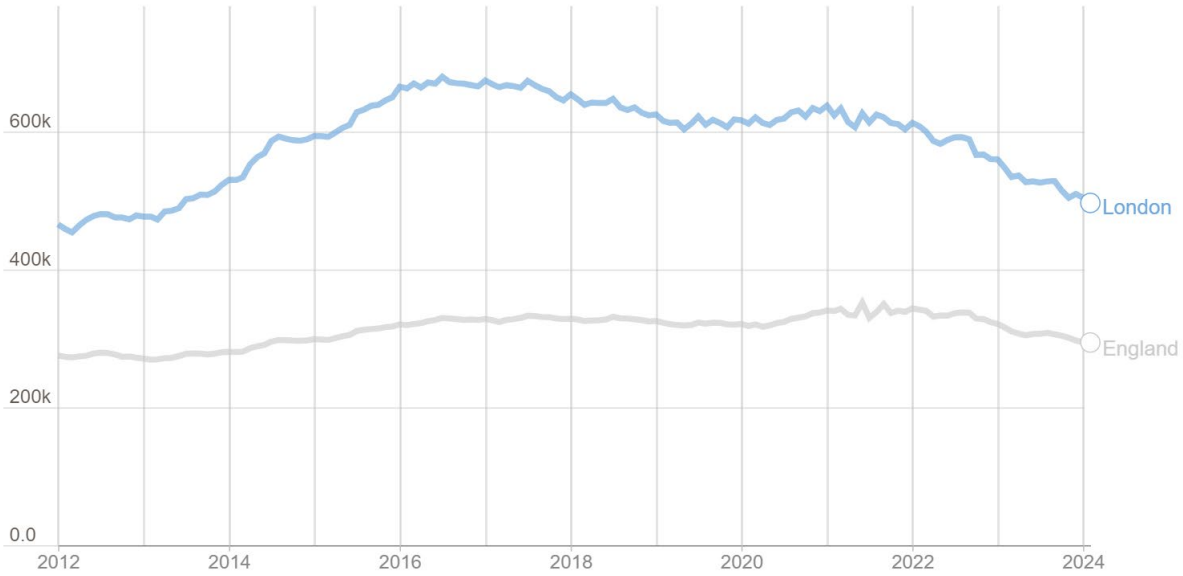
The Home Builders Federation provides a longer historic time series on a consistent basis in its Pipeline Report, and its figures (unlike DLUHC's) are subject to revision over time as new data becomes available.

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 even that recent peak.

Housing Costs and Affordability

Figure 3: Trend in inflation-adjusted average house prices

ONS House Price Index, adjusted for inflation (2024 prices)

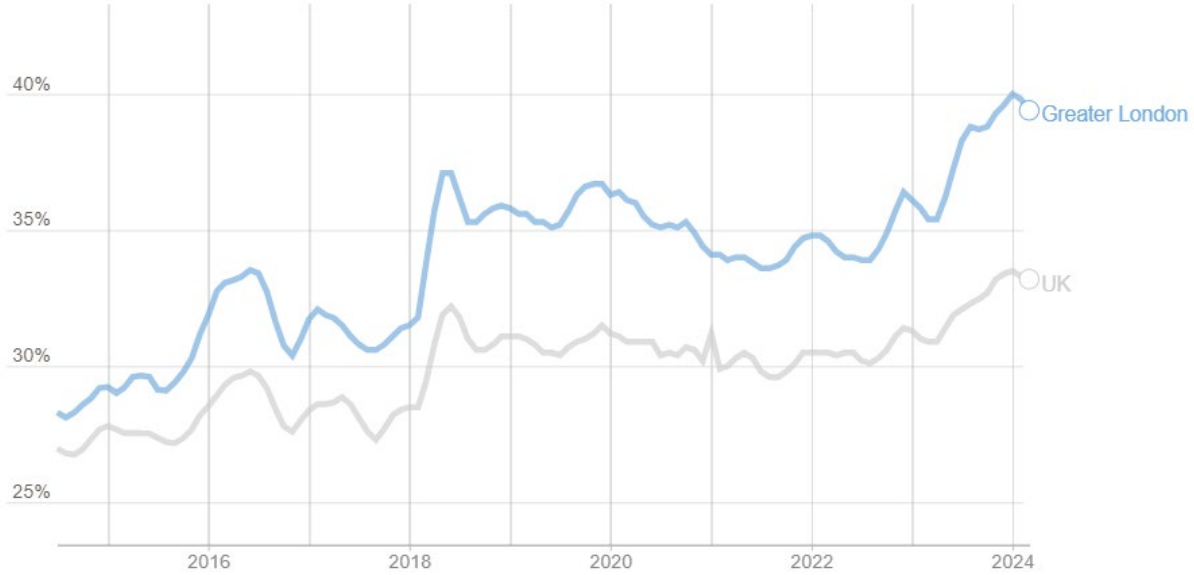


Source: House Price Index and RPI inflation

In February 2024, both England and London saw the lowest inflation-adjusted house price for a decade, at £294,140 and £496,621 respectively. The inflation-adjusted average house price in London fell by 9% in the year to February 2024, and has fallen by 20% compared to February 2021. This compares to a year-on-year fall of 6% across England, and a 13% fall over the last three years. Changes in consumer prices, which have risen by 28% in the last three years, are by far the biggest driver of the fall in inflation-adjusted house prices, as prices in London have risen by 2% in nominal terms over the same period.

Figure 4: Private rent affordability

Average of achieved rent as share of household income, for new tenancies



Source: Homelet Rental Index

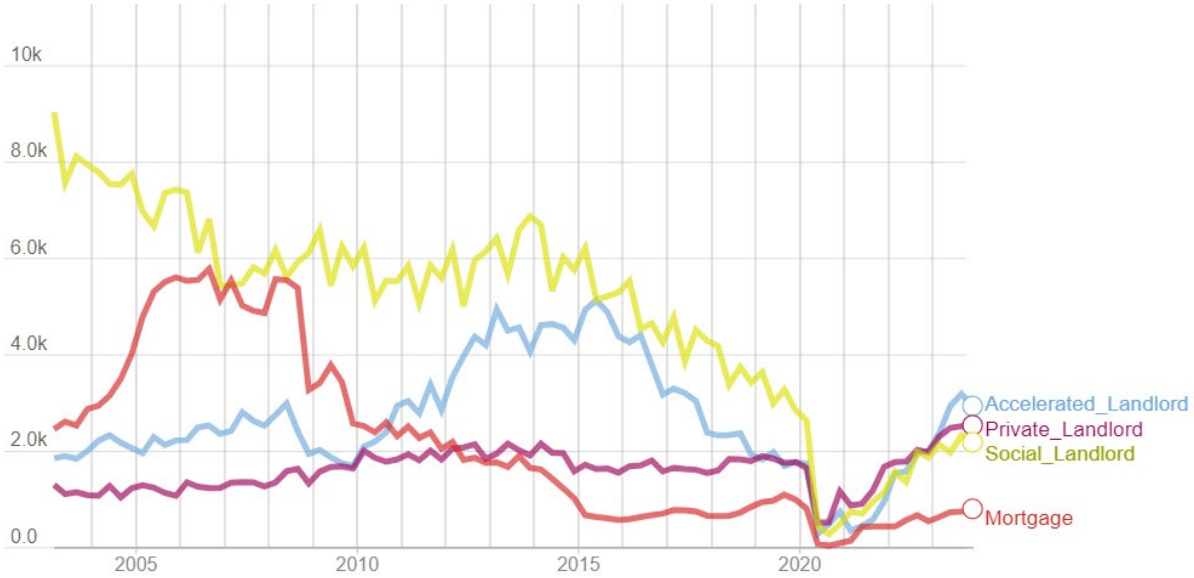
According to data from tenant references collated by Homelet, the rent on new tenancies in London accounted for an average of 39.4% of tenant incomes in March 2024, up sharply from 35.4% in March 2023, although a marginal improvement compared to the recent peak of 40% in January 2024. Across the UK as a whole, private rents on new tenancies accounted for 33.2% of tenant incomes in March, up from 31% a year before.

Growth in rents across all tenancies lags behind the growth of new tenancies but is now rising steeply: the ONS report that average private rents across all tenancies in London increased by 11.2% in the year to March 2024, the fastest growth yet recorded for any region.

Housing Need

Figure 5: Possession claims made by social or private landlords in London

Number of claims



Source: MOJ mortgage and landlord possession statistics

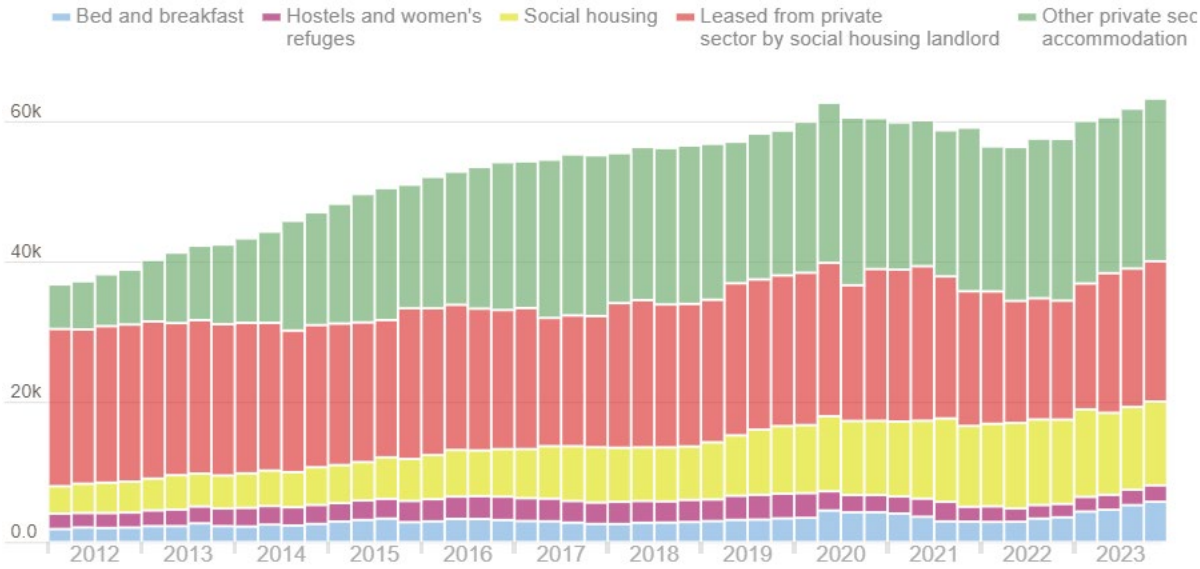
The number of landlord claims against tenants for possession of their property fell gradually from 2014 to 2019, and then dropped sharply during the pandemic as evictions were banned.

The total number of claims by social and private landlords in London fell from 6,700 in Q3 2019 to 1,260 in Q3 2020, before increasing again over the following three years to reach 7,630 in Q4 2023, a slight decrease from the recent peak recorded in Q3 2023. This increase in claims since the pandemic is consistent with rising rents and worsening affordability, as set out in the previous section. Accelerated social and private landlord claims have surpassed pre-pandemic levels, while social and private mortgage claims remain slightly below.

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 that is arranged by London boroughs

Number of households



Source: DLUHC statutory homelessness local authority tables

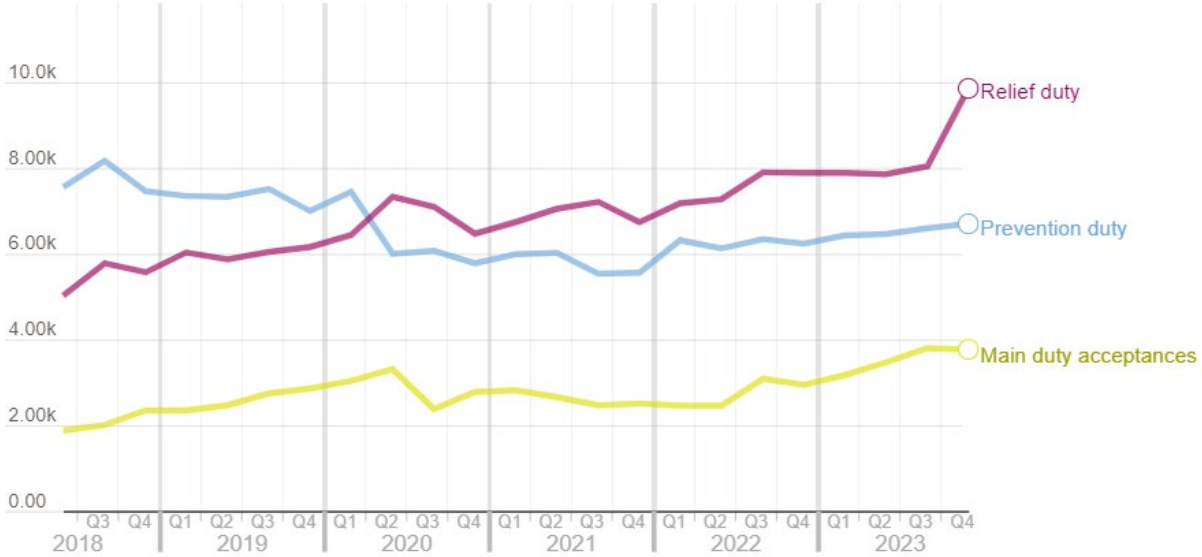
According to DLUHC statistics, there were 63,240 homeless households in temporary accommodation that is arranged by London boroughs at the end of December 2023, up from 57,540 a year before and the highest figure since a peak of 63,800 in late 2005.

42,870 of the homeless London households in temporary accommodation in December 2023 had children, with a total of 84,940 children between them.

The number of households in bed and breakfast (B&B) accommodation has risen sharply in the last year. In December 2022, there were 3,550 households in B&Bs, but by December 2023 this had risen to 5,760, including 2,030 households with children (of which 1,500 had been in the B&B for more than 6 weeks). 11,940 homeless households were being temporarily accommodated in social housing in December 2023, a figure that rose sharply from 2018 to early 2023, but which fell marginally and steadily increased again towards the end of the year.

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]

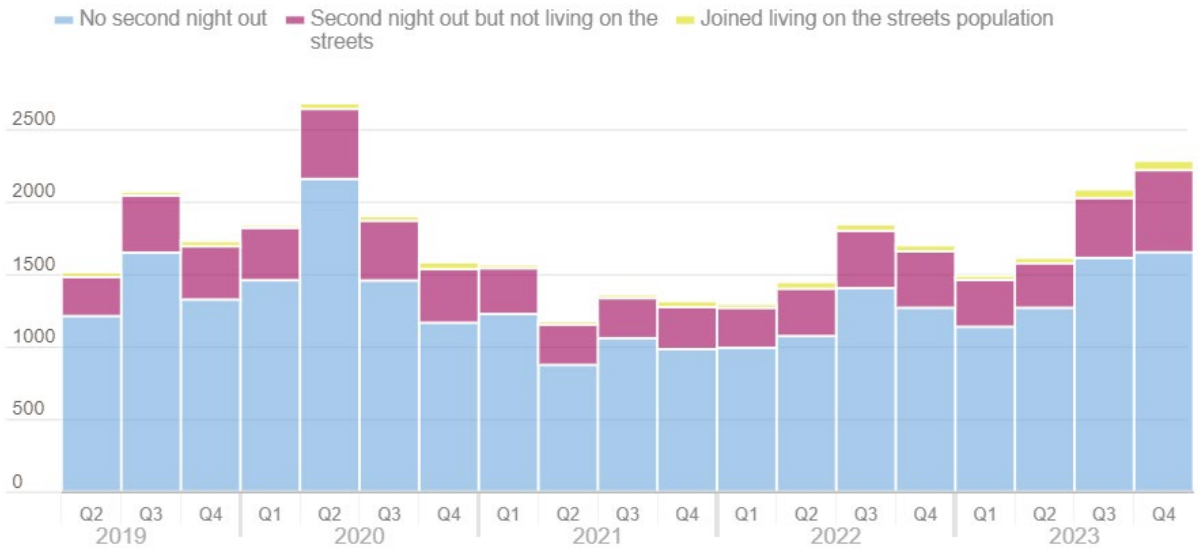
Under the Homelessness Reduction Act, a prevention duty is owed to households threatened with homelessness within 56 days and a relief duty is owed to households that are already homeless and require help to secure accommodation. The relief duty lasts 56 days, after which a household can be accepted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

There were 16,560 households assessed as owed a new prevention or relief duty in London in Q4 2023, including 6,700 prevention and 9,860 relief duties. Each of these figures has been increasing since Q4 2022, but the number of households owed a prevention duty each quarter is still below pre-pandemic levels.

There were 3,770 households accepted as owed a main homelessness duty by London boroughs in Q4 2023, a marginal 0.7% decrease from the last quarter at 3,800, which was the highest number since these figures were first compiled in 2018.

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

Number of people



Source: GLA CHAIN quarterly rough sleeping reports

In Q4 2023, outreach teams recorded 2,283 new people who were seen sleeping rough in London for the first time, the highest figure since the mid-pandemic peak of 2,680.

1,652 of the new rough sleepers seen in Q4 2023 spent only one night sleeping rough, while 567 were recorded as sleeping rough for more than one night but not considered to be living on the streets, a 36% increase on the previous quarter. 64 people were judged to have joined the population living on the streets as they had been seen multiple 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. It presents data on greenhouse gas emissions, air quality, recycling rates, and other environmental indicators.

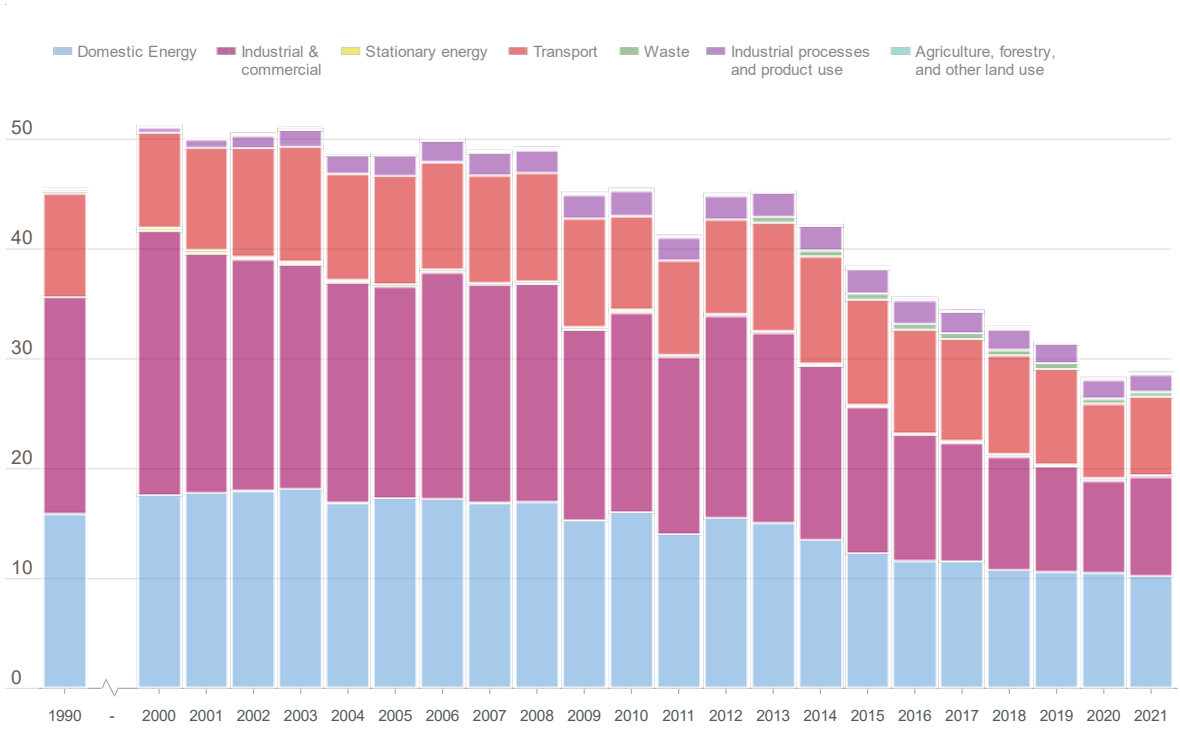
This structure follows the priorities established by the Mayor in his London Environment Strategy, which sets out his vision for tackling climate and ecological emergencies whilst improving London's air quality.

Greenhouse Gas (GHG) Emissions

The London Energy and Greenhouse Gas Inventory (LEGGI) reports yearly GHG emissions in London by source[53,54]. The most recent data for London are for 2021 (published in December 2023 due to a two-year lag).

Figure 1: GHG emissions in London

Million tonnes ($MtCO_2e$)



Source: GLA, LEGGI, 2021 (published 2023). Data published with two-year lag as based on Department for Energy Security and Net Zero energy consumption datasets that are also lagged.

[53] For ease of reporting, different GHG emission levels are converted into CO_2 emissions levels (tCO_2e) that have an equivalent potential of global warming– see HM Government, Environmental Reporting Guidelines.
[54] For comparisons with trends outside London, see Local authority and regional carbon dioxide emissions national statistics. For more data on emissions and removals from land use by Local Authority , see UKCEH, Detailed emissions and removals from land use, land-use change and forestry.

Figure 1 shows that in 2021, London's emissions were the equivalent of 28.7 million tonnes of GHG emissions ($MtCO_2e$) across 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 the total, transport emissions for 25%, with other sources responsible for the remaining 7%.

2021 emission levels represent a 37% reduction on 1990 and a 44% reduction compared with 2000, despite a significant population increase over these periods (29% and 22% respectively). London's emissions dipped by 10% during 2020 due to COVID-19's onset, before rebounding by about 2% in 2021. Nationally, emissions dropped by 10% in 2020, followed by a 5% rebound in 2021.

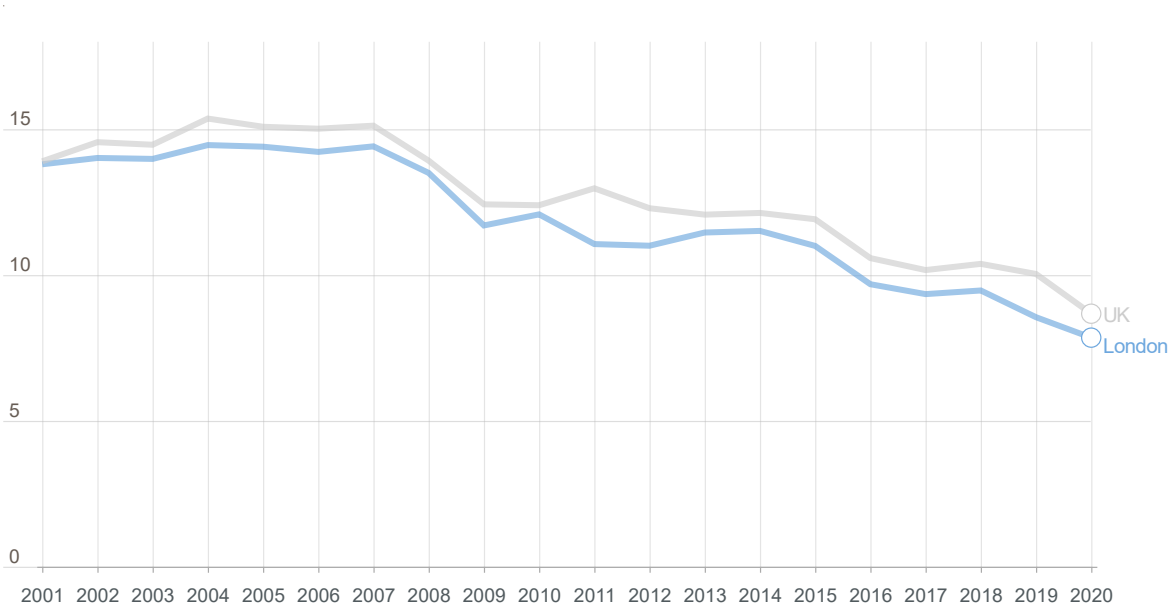
In per-capita terms, London's emissions fell by 51% between 1990 and 2021 (from 6.7 to 3.3 $MtCO_2e$). London has the lowest per-capita emissions of any UK region due to the city's extensive public transport system, high population density and lack of heavy industry.

LEGGI uses government emissions factors and energy consumption data, as well as detailed transport emissions data and national datasets on waste and industrial process emissions. It is oft-cited as it uses 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.

London's emissions affect areas beyond Greater London through activities such as consumption of goods produced elsewhere and travel. As of 2020, London's consumption emissions were approximately 71 $MtCO_2e$. This is down by 32% since 2001, despite the city's population increasing by 1.5 million over that period. Consequently, per-capita emissions fell by 43%.

Figure 2: Per-capita consumption emissions in London and the UK

Tonnes GHG from consumption per capita (tCO_2e/capita)



Source: University of Leeds analysis for GLA, ReLondon and London Councils, 2020 (published in 2023). Data published with a time lag due to dependence on national datasets that are lagged.

Figure 2 compares London's per-capita consumption emissions to the UK's. London's per-capita consumption-based footprint (7.86 tCO_2e) is lower than the UK's (8.68 tCO_2e). This reflects different consumption patterns by region. For example, compared to residents of other UK regions, Londoners have lower per-capita food and private transport footprints whilst having higher air travel and public transport footprints.

Air Quality

Air quality is used to describe levels of pollution in the air we breathe. There is strong evidence linking adverse health impacts to levels of nitrogen dioxide (NO_2) and particulate matter (PM), so analysing levels of these pollutants is very important.

NO_2 is a gas that is mainly produced during the combustion of fossil fuels, along with nitric oxide (NO). Exposure to NO_2 can lead to adverse health impacts such as inflammation of the airways, 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 activity such as construction, vehicle exhaust emissions, and road dust resuspension. There are well-documented health impacts associated with PM exposure[55]. PM is usually categorised according to the maximum diameter of each particle (PM_{10} or $PM_{2.5}$).

This section summarises long-term trends in key air pollutant concentrations monitored across London[56]. The data is presented as monthly average concentrations[57] until the end of March 2024, the latest full month of available data at the time of writing. Air pollution concentrations are affected by various factors and follow patterns of seasonal variation, with generally higher concentrations of NO_2 and PM in winter. 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 scheme's impact on pollutant emissions and concentrations will be included in the ULEZ One Year Report once longer-term comparative trend analysis is available.

Air quality data in this report has been averaged by the following locations: Central (i.e., within the congestion charge zone); Inner (outside the Central zone but within the north and south circular roads (the boundary of the previous phase of ULEZ)); and Outer (the area from, and including, the North and South Circular Roads to the GLA boundary). Data has also been split by site type, defined as: roadside sites,

---

[55] COMEAP (2022). Advice on health evidence relevant to setting $PM_{2.5}$ targets. Available online at: https://assets.publishing.service.gov.uk/media/623075a3d3bf7f5a89aecec3/COMEAP_WHO_AQG_-_Defra_PM2.5_targets_advice__2_.pdf

[56] Data has been collated from publicly available air quality data available at: London Air Quality Network; Air quality in England (airqualityengland.co.uk); Home - Defra, UK; and Air Quality in the United Kingdom (ukairquality.net). Note also the London Atmospheric Emissions Inventory 2019 provides detailed mapping of air pollutants in London, however it does not include frequently-updated data.

[57] Provisional data was included to provide the most recent snapshot of air quality. The process of ratifying the data (i.e., undergoing detailed quality assurance and control) can take between six months to a year and varies across monitoring stations in London. Monitoring sites with minimum 5% data capture for a month have been included in the report.

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[58].

The following table compares UK legislation on these pollutants (as set in the Air Quality Standards Regulations (2010)) to current WHO guidelines.

	UK (Air Quality Standards Regulations (2010))	WHO Guidelines
NO_2	Long-term (annual) average concentration must not exceed 40 µg/m^3	Annual average concentration guideline of 10 µg/m^3, whilst introducing additional interim targets of 30 µg/m^3 and 20 µg/m^3
PM_{10}	Long-term (annual) average concentration must not exceed 40 µg/m^3	Annual average concentration guideline of 15 µg/m^3, while retaining 20 µg/m^3 as an interim guideline.
$PM_{2.5}$	Long-term (annual) average concentration must not exceed 20 µg/m^3	Annual average concentration guideline of 5 µg/m^3, while retaining 10 µg/m^3 as an interim guideline[59]

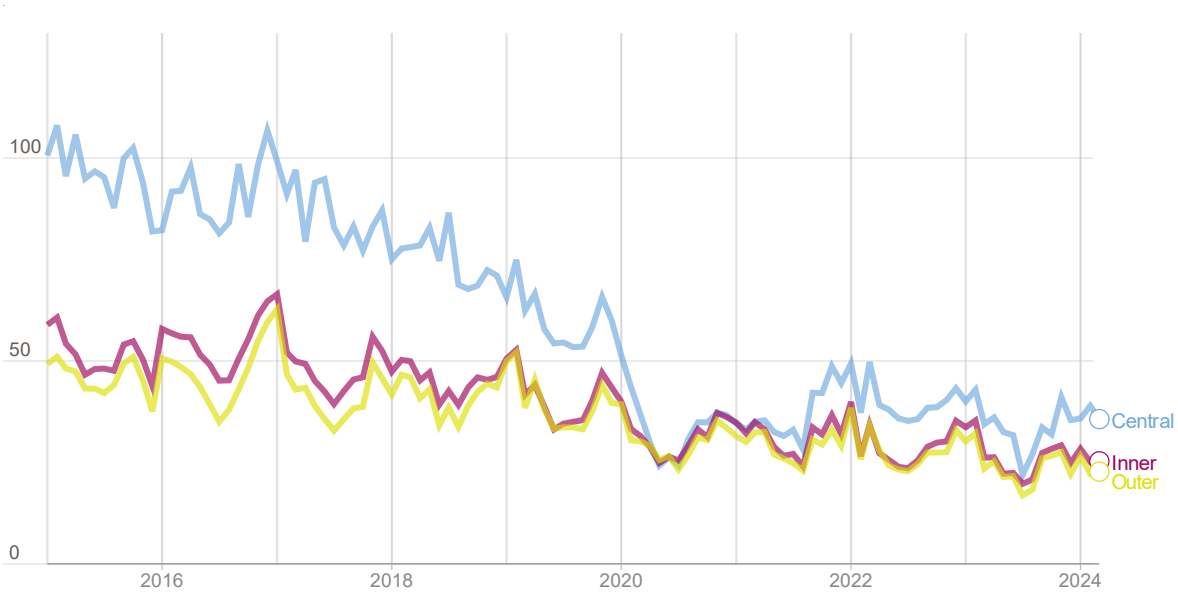
It should be noted that recent evidence[60] on the health impacts associated with $PM_{2.5}$ has prompted the setting of a more stringent UK limit under the Environment Act (2021) of 10 µg/m^3 (to be met by 2040)[61].

[58] London Local Air Quality Management Technical Guidance 2019 (LLAQM.TG (19)) (2019). Available at: Working with the London boroughs | London City Hall
[59] The Mayor has committed to meeting this target by 2030.
[60] GOV UK (2022) Fine particulate air pollution ($PM_{2.5}$) setting targets, available at: Fine particulate air pollution (PM2.5): setting targets - GOV.UK (www.gov.uk)
[61] GOV UK (2023) Environmental Targets (Fine Particulate Matter) (England) Regulations 2023.

Nitrogen Dioxide (NO_2)

Figure 3: NO_2 monthly average concentrations at roadside monitoring locations

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

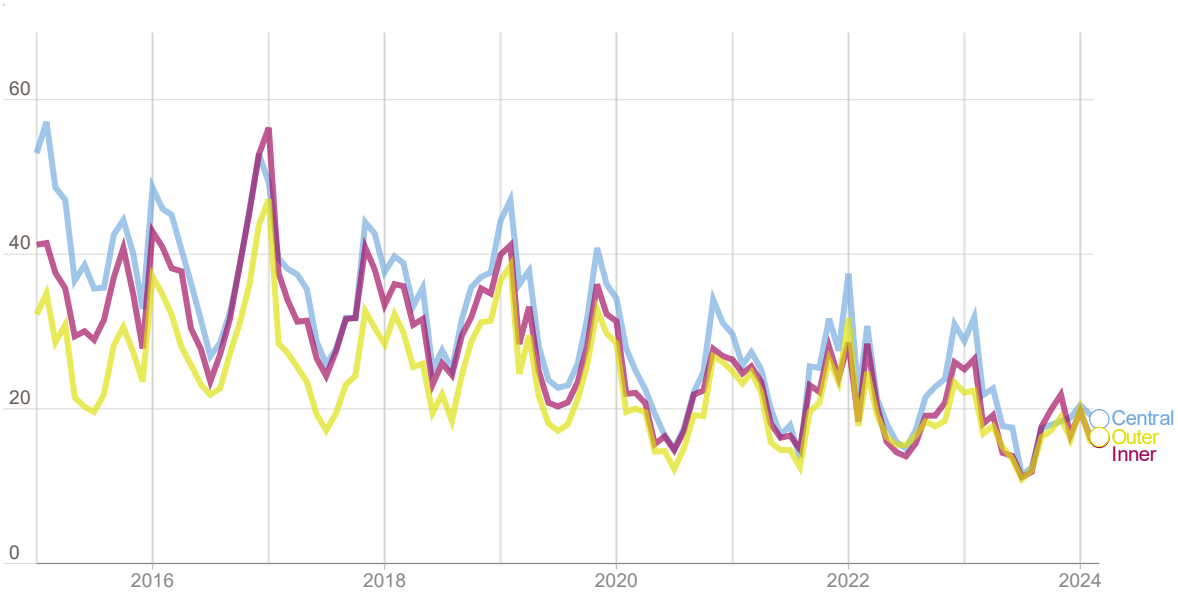


Source: London Air, Air Quality England, UK-Air, and Air Quality in the UK. Data can be viewed on the State of London Dashboard.

Figure 3 demonstrates that monthly NO_2 concentrations across Central, Inner, and Outer roadside monitoring stations have been decreasing since 2017, with noticeable reductions observed during the pandemic. Since mid-2021, as activity started to return, concentrations began to increase in Central London compared to Inner and Outer London, though they continue to be much lower than pre-pandemic levels.

Figure 4: NO_2 monthly average concentrations at urban background monitoring locations

Micrograms per cubic meter (µg/m^3)



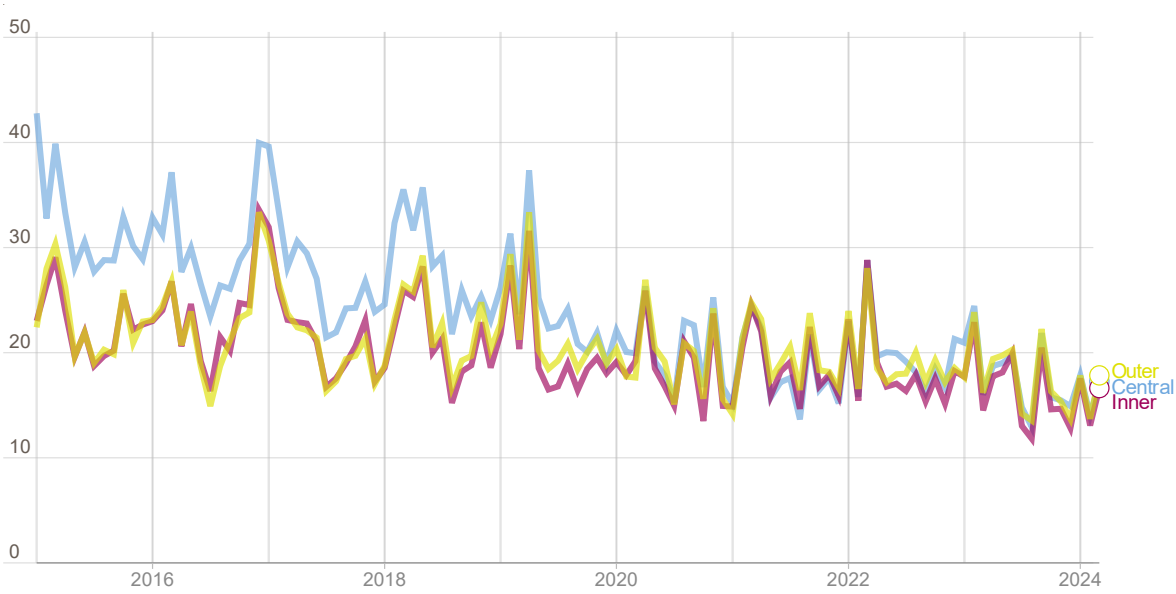
Source: London Air, Air Quality England, UK-Air, and Air Quality in the UK. Data can be viewed on the State of London Dashboard.

Urban background NO_2 concentrations are generally lower than roadside concentrations due to the distance from the main pollutant source (i.e., vehicular traffic on roads). Figure 4 shows that the winter peak in 2024 was noticeably lower across London than it was in previous years. Despite the significant progress made and the general downward trend since 2017, additional action is needed in order to meet WHO (2021) guidelines and to further protect human health.

Particulate Matter (PM)

Figure 5: PM_{10} monthly average concentrations at roadside monitoring locations

Micrograms per cubic meter (µg/m^3)



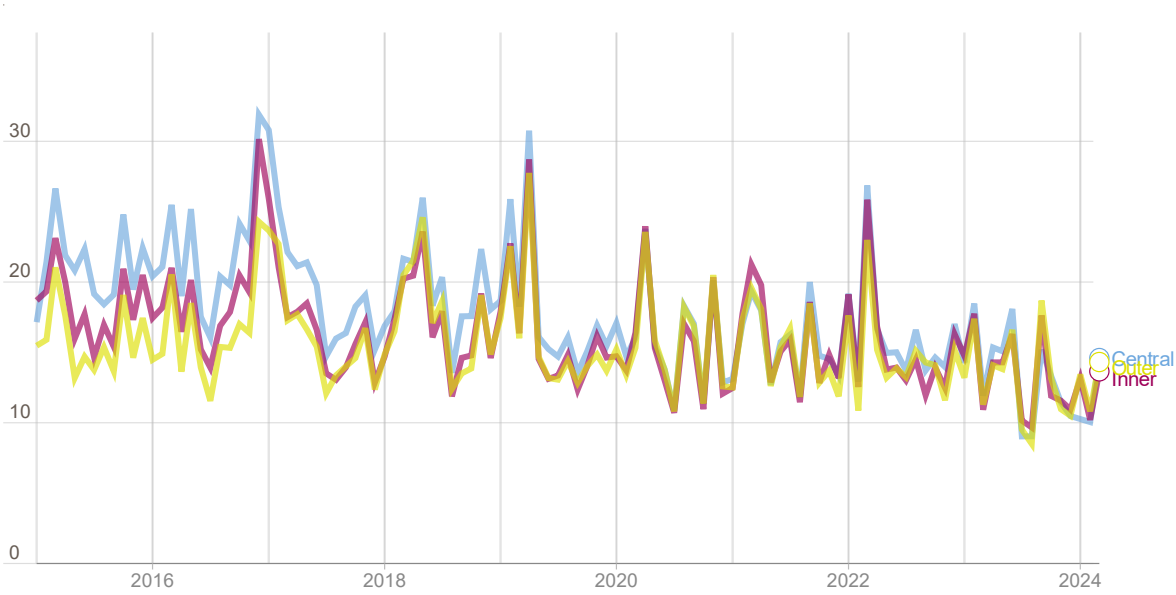
Source: London Air, Air Quality England, UK-Air, and Air Quality in the UK. Data can be viewed on the State of London Dashboard.

Figure 5 shows PM_{10} concentrations at roadside monitoring locations for Central, Inner, and Outer areas in London averaged per month.

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

Figure 6: PM_{10} monthly average concentrations at urban background monitoring locations

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



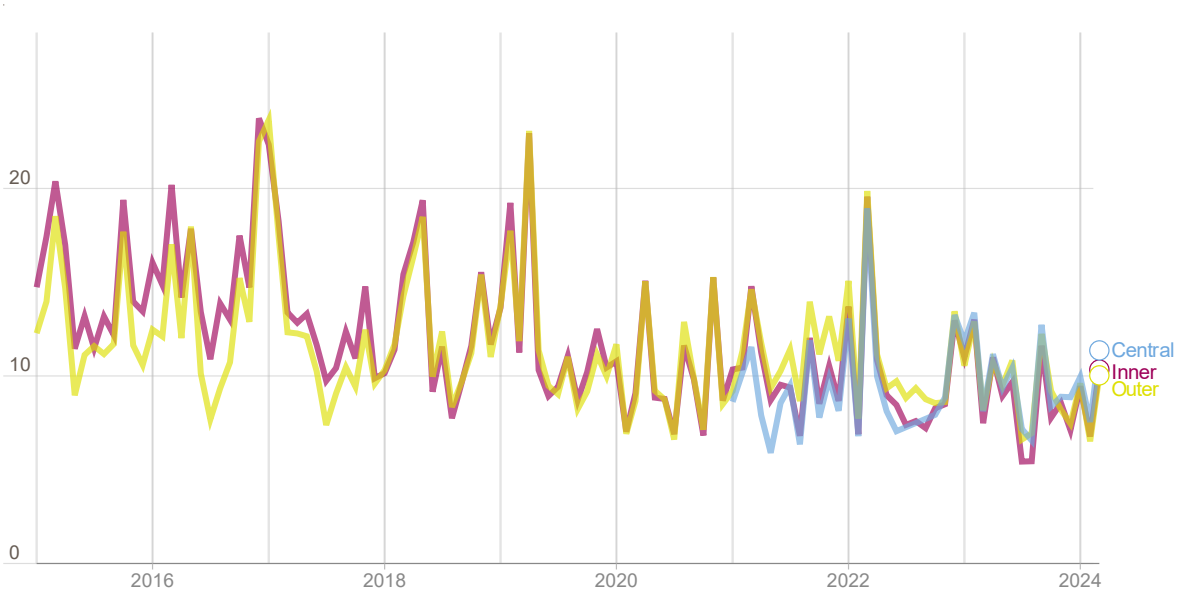
Source: London Air, Air Quality England, UK-Air, and Air Quality in the UK. Data can be viewed on the State of London Dashboard.

Figure 6 shows a general decreasing trend in PM_{10} concentrations at urban background monitoring locations over time, although the drop is not as pronounced as for NO_2. PM_{10} monthly average concentrations have been similar across all three areas of London since 2018.

As is the case for NO_2, PM_{10} concentrations in the urban background are generally lower than they are in roadside areas.

Figure 7: $PM_{2.5}$ monthly average concentrations at roadside monitoring locations

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



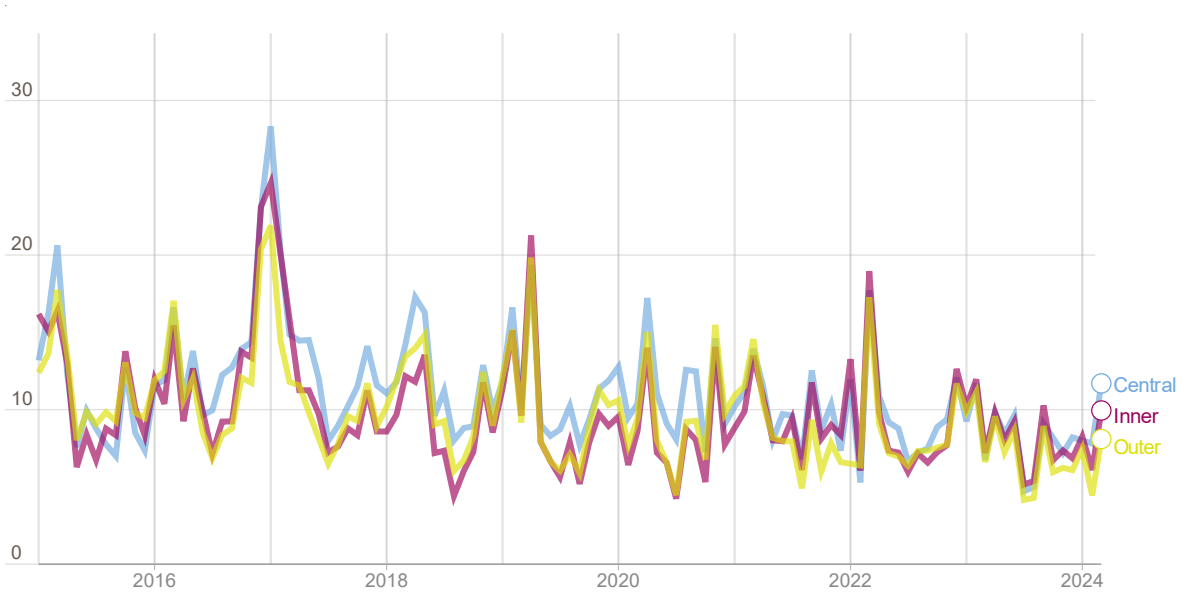
Source: London Air, Air Quality England, UK-Air, and Air Quality in the UK. Data can be viewed on the State of London Dashboard.

Figure 7 shows $PM_{2.5}$ concentrations 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 $PM_{2.5}$ in Central London.

$PM_{2.5}$ monthly average concentrations have remained below the UK annual legal limit (20 $\mu g/m^3$) for approximately four years, but above the WHO (2021) guideline level (5 $\mu g/m^3$). Figure 7 reveals a general downward trend across all locations, albeit less defined than for the other pollutants.

Figure 8: $PM_{2.5}$ concentrations at urban background monitoring locations

Micrograms per cubic meter (µg/m³)



Source: London Air, Air Quality England, UK-Air, and Air Quality in the UK. Data can be viewed on the State of London Dashboard.

Figure 8 shows $PM_{2.5}$ concentrations at urban background monitoring locations for Central, Inner, and Outer London averaged per month.

$PM_{2.5}$ concentrations in the urban background are also generally lower than those in roadside areas, albeit marginally. Concentration levels in the urban background have followed similar trends to ones in roadside locations.

Further Information

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

Breathe London provides a map with charts showing hourly updates of the concentration of air pollutants at several measurement sites across London. It also presents data for non-reference grade monitors, classed as “indicative”, that provide supplementary monitoring to permit greater coverage across London.

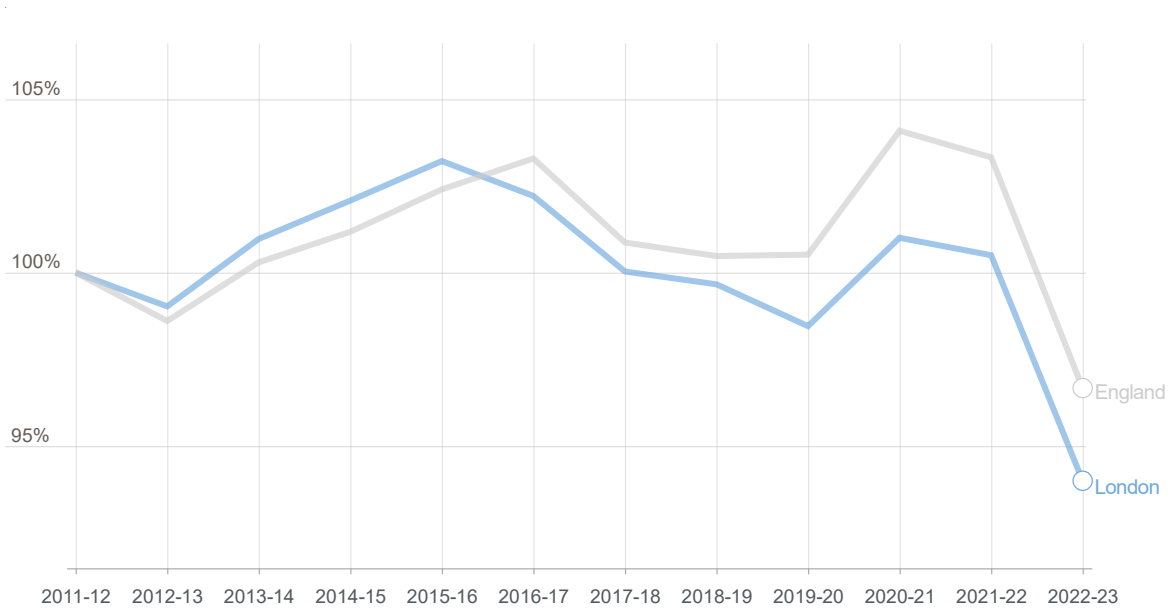
In April 2023, the GLA published an update to the London Atmospheric Emissions Inventory (LAEI)[62] providing projections for the years 2025 and 2030. It estimated that London will be legally compliant with UK limits by 2025. Despite progress towards WHO interim targets, forecasts show that all of London will continue to exceed WHO average annual guidelines in both 2025 and 2030 without further action.

[62] London Atmospheric Emissions Inventory (LAEI) (2019), Available at: London Atmospheric Emissions Inventory (LAEI) 2019 - London Datastore

Waste and Circular Economy

Figure 9: Local Authority collected waste generation

Amount of Local Authority Collected Waste (LACW) – i.e., 'all waste in the possession or control of waste authorities'[63] as a % of 2011/12 levels



Source: DEFRA, Local authority collected waste management - annual results.

Figure 9 shows how LACW (including the combined tonnages of both waste and recycling collected by local authorities) has changed in London and England up to 2022/23, compared to 2011/12 volumes.

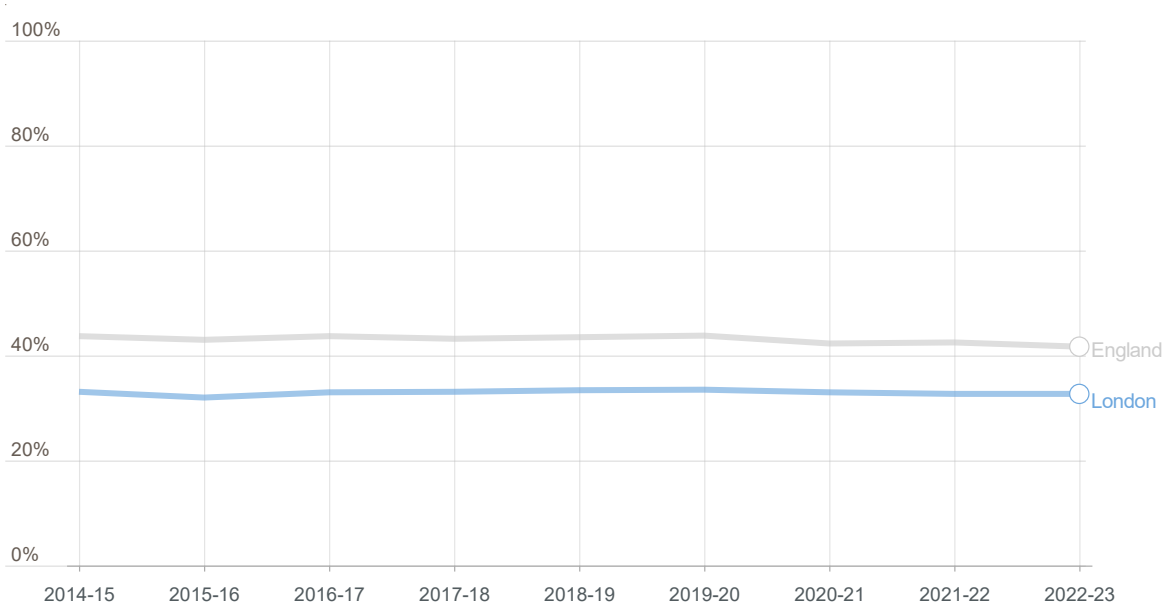
Trends across London and England have remained relatively comparable. 2022/23 volumes in both London and England demonstrated a significant annual decrease.

Tonnage of waste generated and recycled can vary according to the weather, population changes and shifts in working practices (e.g., working from home).

[63] https://www.london.gov.uk/programmes-and-strategies/environment-and-climate-change/london-environment-strategy

Figure 10: Household waste recycling rate

% of collected household waste that is recycled



Source: DEFRA, Local authority collected waste management - annual results.

Figure 10 shows the share of household waste collected by Local Authorities in London and England that is sent for recycling.

The recycling rate has remained relatively consistent in recent years, both in London and nationally. The most recent Defra data shows that London was the only region in England not to see a drop in its 'household waste' recycling rate between 2021/22 and 2022/23, against a national decrease of 0.8% in the same period. However, London has the second lowest 'household waste' recycling rate of any English region, with a 2022/23 rate of 32.7% (compared to a national rate of 41.7%)[64].

Increasing the recycling rate in London can be challenging, as a high proportion of Londoners live in flats (up to 80% in some areas), and compared to other regions, London is highly urbanised 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.

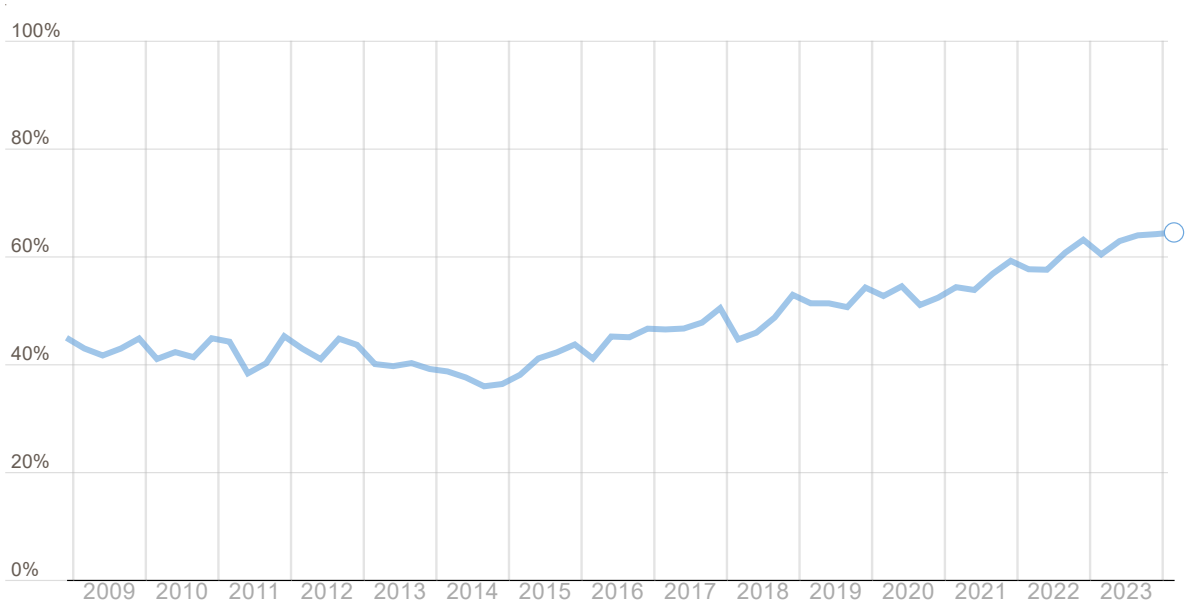
[64] https://www.gov.uk/government/statistics/local-authority-collected-waste-management-annual-results/local-authority-collected-waste-management-annual-results-202223#household-waste-recycling

Energy Generation and Efficiency

An Energy Performance Certificate (EPC) tells us how energy-efficient a property is, from A (best) to G (worst). EPCs are required when properties are built, sold or let, and all new EPCs are added to the Energy Performance of Buildings Register.

Figure 11: Energy efficiency ratings of new and existing homes, London

% of all domestic Energy Performance Certificates (EPCs) with a rating of A-C out of all domestic EPCs registered on the Energy Performance of Buildings Register



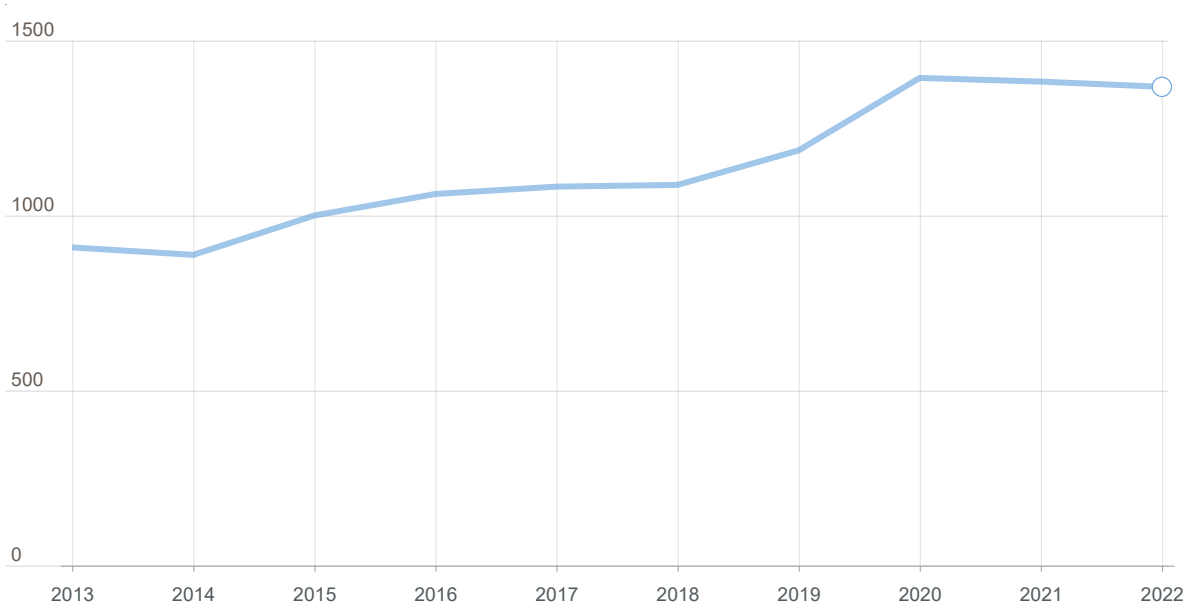
Source: DLUHC, MHCLG, Live tables on Energy Performance of Buildings Certificates, Table D1: domestic EPCs for all dwellings by energy efficiency rating. Data also available at Local Authority level.

Figure 11 shows the share of domestic EPCs added to the register per quarter with an efficiency rating of A-C (not cumulative totals). Data are based on experimental statistics.

Since Q4 2014, the energy performance of dwellings added to the register increased steadily, with a marked increase in 2021 and 2022, and again from Q2 2023 onwards. The Mayor's London Plan requirements for new developments and the government's Minimum Energy Efficiency Standards (MEES) requirement for rental properties could have contributed to this increase.

The Department for Levelling Up, Housing and Communities (DLUHC) provides an Interactive EPC Tool with quarterly statistics on EPCs issued for domestic and non-domestic properties.

Figure 12: 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 Local Authority level.

Figure 12 shows the amount of electricity generated in London via renewable sources (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 at 1,393 GWh in 2020, while decreasing very slightly in 2021 and in 2022 (to 1,368 GWh[65]) due to a decrease in sewage gas.

Total electricity consumption in London in 2021 was almost 35,000 GWh (the latest data available from LEGGI) – meaning that local renewable electricity generation accounted for around 4% of London's electricity consumption.

Data on renewable electricity generation are reported annually and will next be published in September 2024 (with observations from 2023).

Green Infrastructure

The GLA prepared a number of interactive Green infrastructure maps and tools to present London's green infrastructure. This includes green cover and tree canopy cover maps based on modelling 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 later in 2024.

The need for more sustainable drainage systems (SuDS) is now widely recognised internationally and embedded in our national and local planning systems (including in

[65] 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 to updates from data suppliers or more up-to-date information becoming available.

the Mayor's London Plan). The retrofit SuDS map[66] shows the progress made by boroughs, TfL, housing associations, water companies, charities and other entities to install SuDS across London. The map is updated regularly by these organisations as more SuDS are delivered.

[66] See here: https://apps.london.gov.uk/suds

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

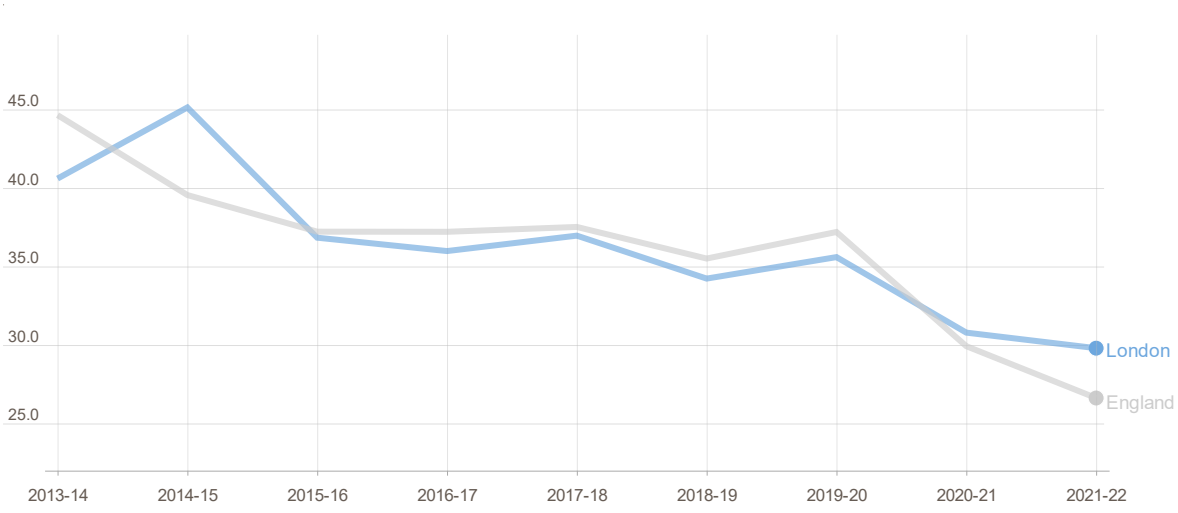
Much of the data is drawn from the Department for Culture, Media and Sport's (DCMS) Community Life Survey. This is a key source for understanding more about community engagement, volunteering and social cohesion throughout England. In previous years, the GLA published summaries of this survey, providing 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 various measures (e.g., neighbourhood belonging, trust 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

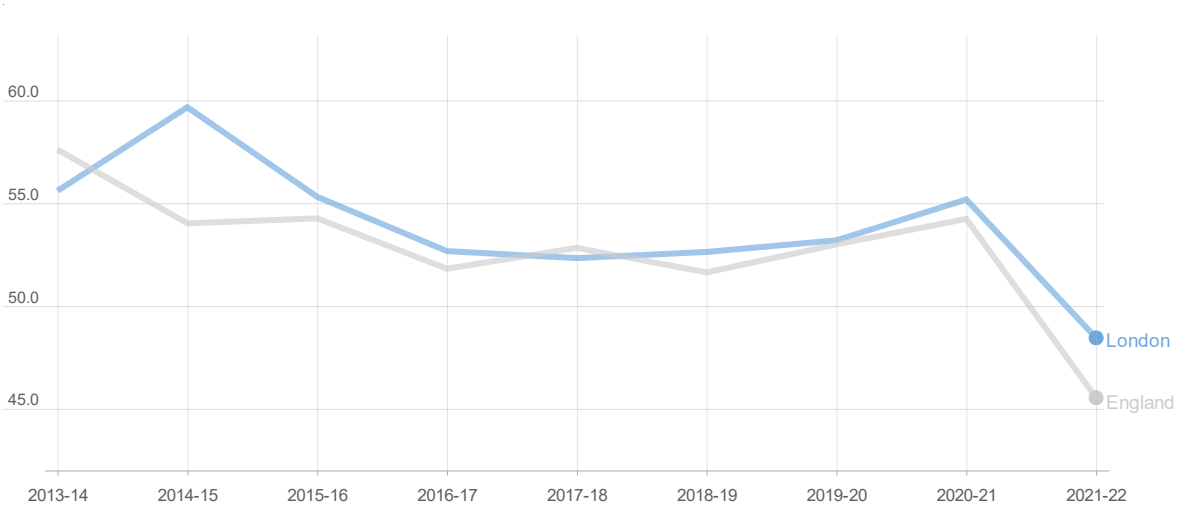
Three in ten (30%) Londoners aged 16+ formally volunteered in 2021-22. Formal volunteering refers to giving unpaid help through clubs or organisations.

Since 2013-14, the percentage of people reporting that they had formally volunteered in the last year decreased in London by 11 percentage points (pp), 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 18pp 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

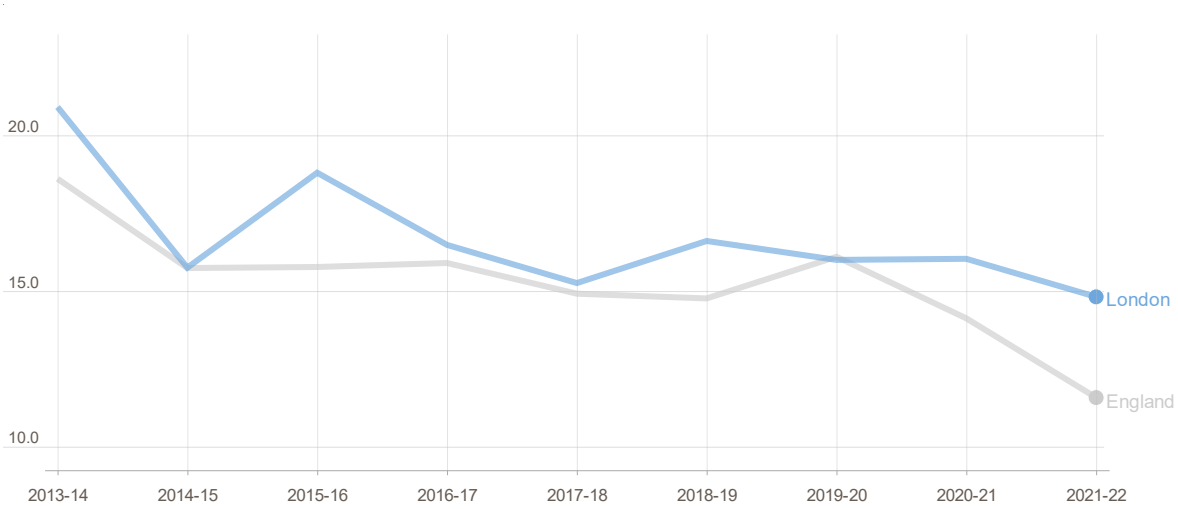
Around half (48%) of Londoners informally volunteered in 2021-22. Informal volunteering refers to giving unpaid help to individuals who are not a relative.

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 7pp lower than in 2013-14. Across England, they declined by 12pp.

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.

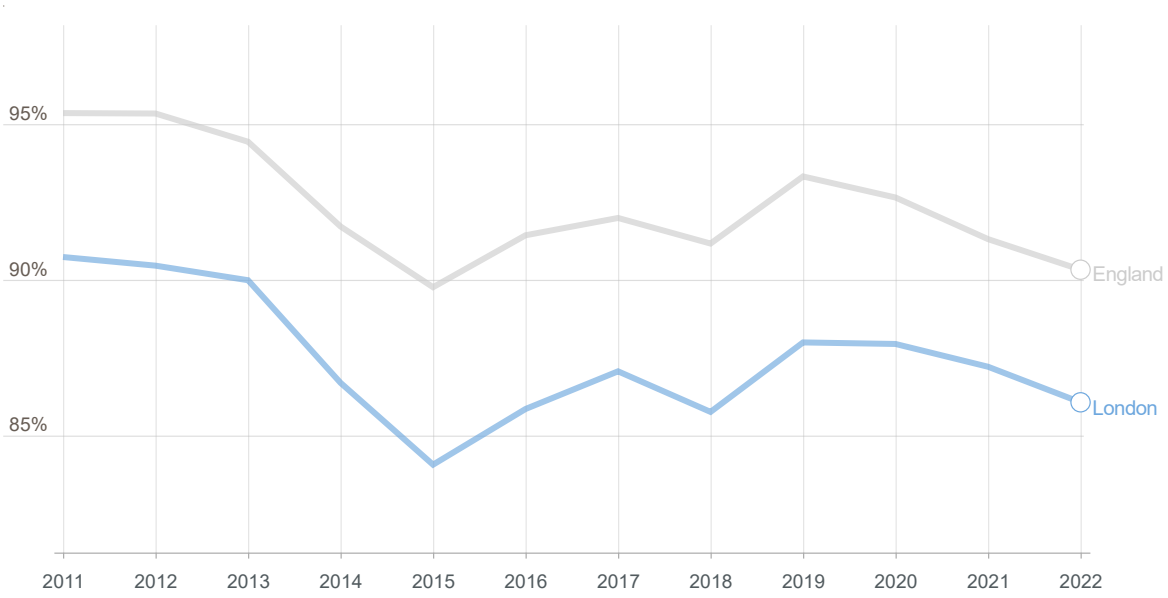
Since 2013-14, the percentage of people reporting that they were involved in social action decreased in London by 6pp, a pattern mirrored across England.

Older Londoners (aged 50+) 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+ 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.

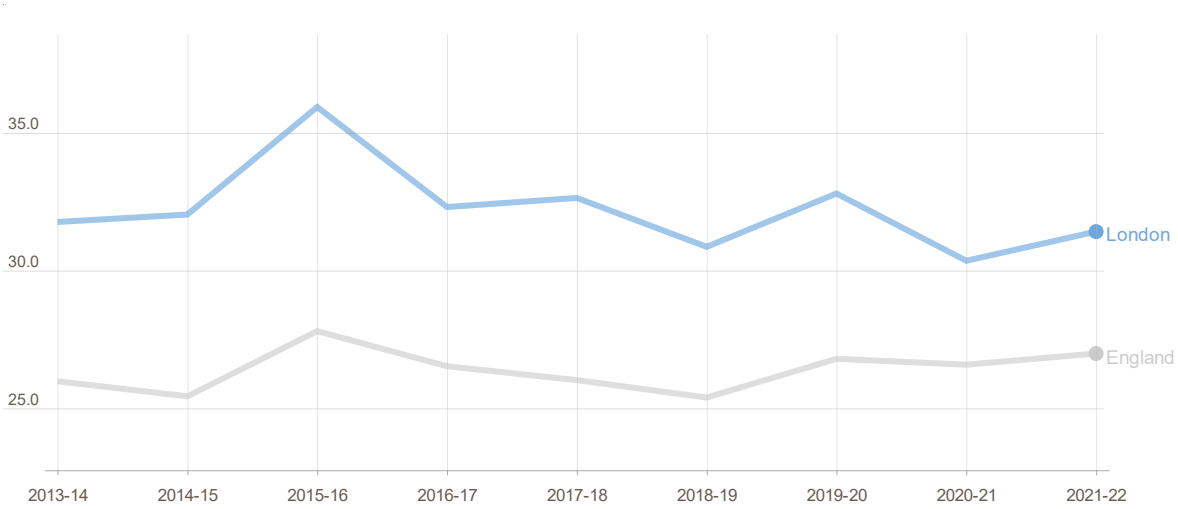
The voter registration rate in London has remained high since 2011. Back then, 91% of eligible adults were registered for local elections. However, by 2022, this was 86%. In other words, around one in seven Londoners (14%) were not registered to vote in 2022. The voter registration rate has been consistently lower in London than in England over the last decade, with London's rate being, on average, 5pp 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[67]. This means the local election registration rate is likely to be slightly higher than presented here.

[67] 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.

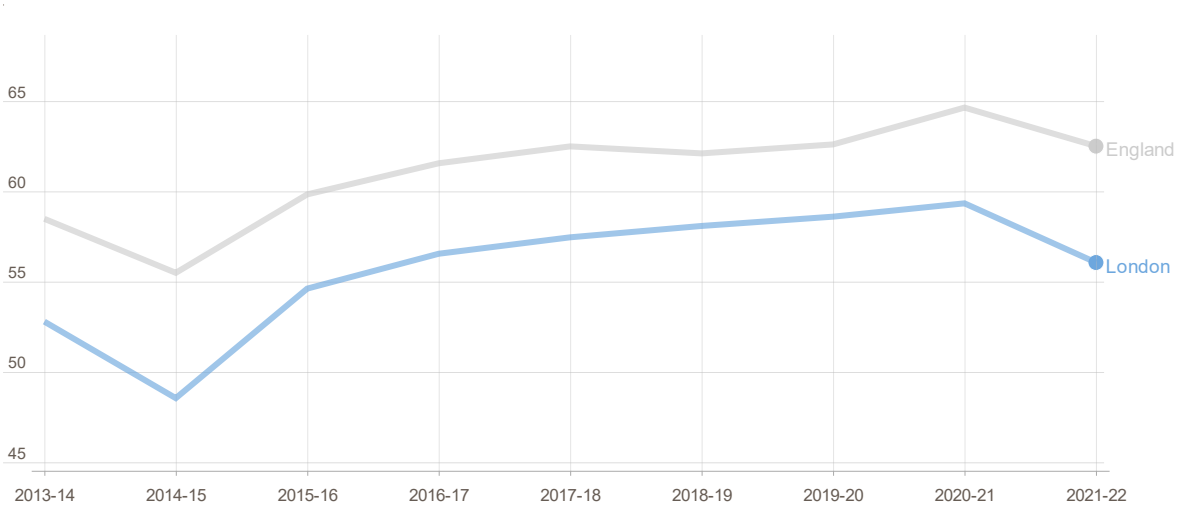
Since 2013-14, the percentage of people in London reporting that they could personally influence decisions in their local area has not changed much year to year, a pattern mirrored across England.

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 (%)



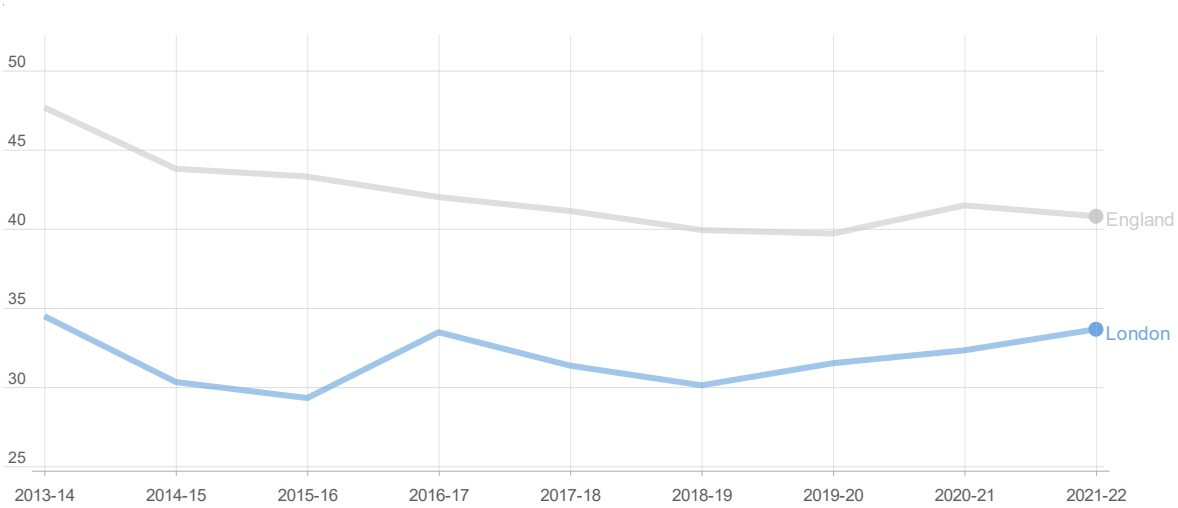
Source: DCMS, Community Life Survey

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 rates were not statistically significant.

Neighbourhood belonging is lower in London compared with England overall and has been since 2013-14 (on average, by 5pp). However, the Survey of Londoners 2021-22 showed that 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.

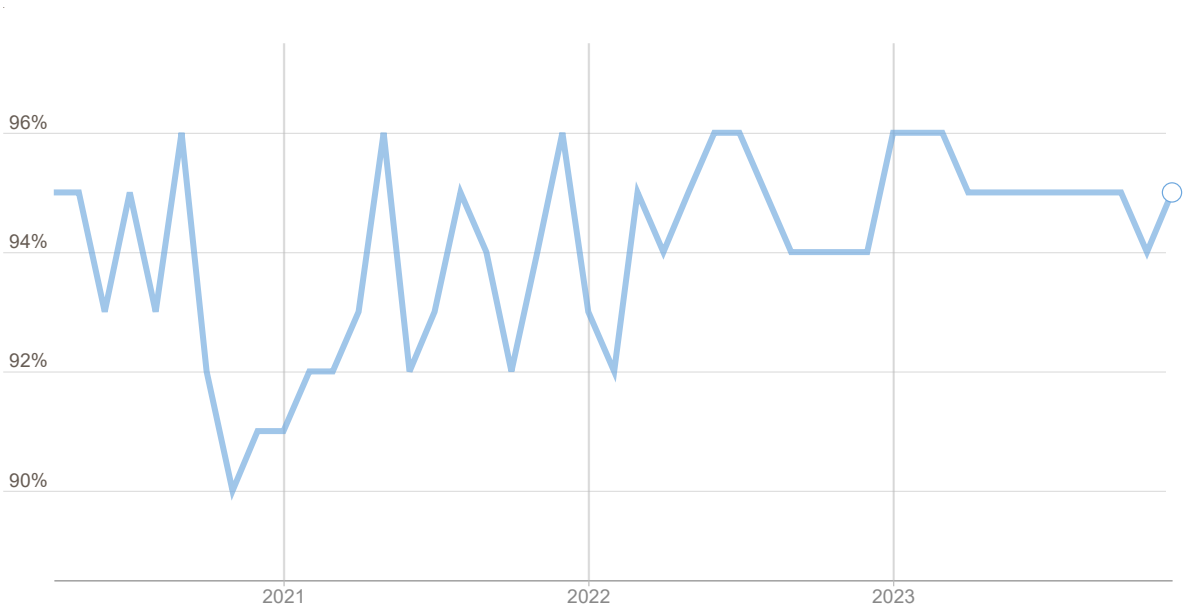
Trust within local neighbourhoods increases with age. In 2021-22, 17% of Londoners aged 16-24 agreed that many of the people in their local neighbourhood could be trusted. This compares to 33% among Londoners aged 25-64 and 49% among Londoners aged 65 and over.

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

Social Cohesion

Figure 8: Neighbourhood cohesion

Proportion of Londoners who agree that people from different backgrounds get on well in their local area (%)



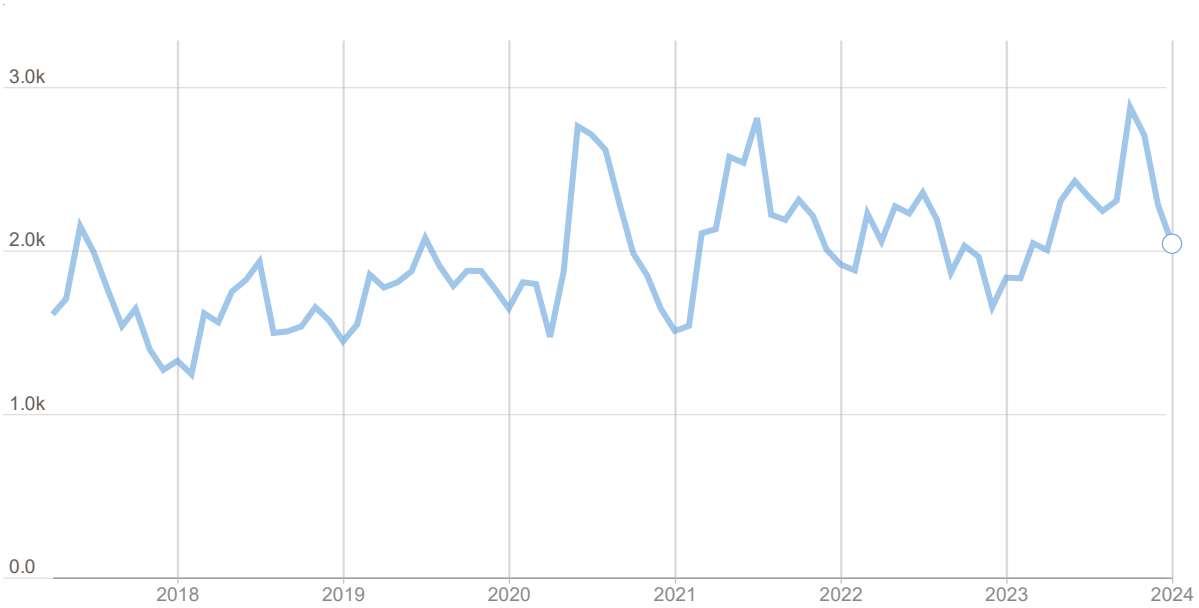
Source: MOPAC, Public Attitude Survey (PAS)

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



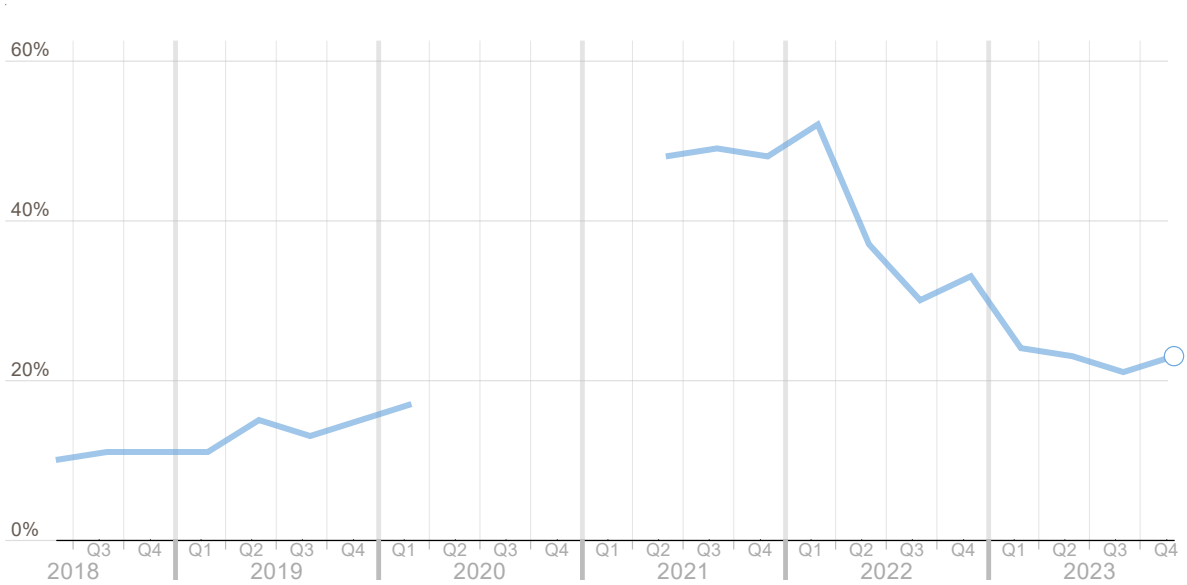
Source: Met Police, Hate Crime Dashboard

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 again 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 2,700 in November 2023 (driven by a surge in antisemitic hate crimes that coincided with the onset of the Israel-Gaza war). It has since fallen back and the latest data from January 2024 shows around 2,000 hate crimes recorded in the month, slightly higher than pre-pandemic.

Figure 10: Perception of hate crime

Proportion of Londoners who think hate crime is a major/minor problem in their area (%)



Source: MOPAC, Public Attitude Survey (PAS)

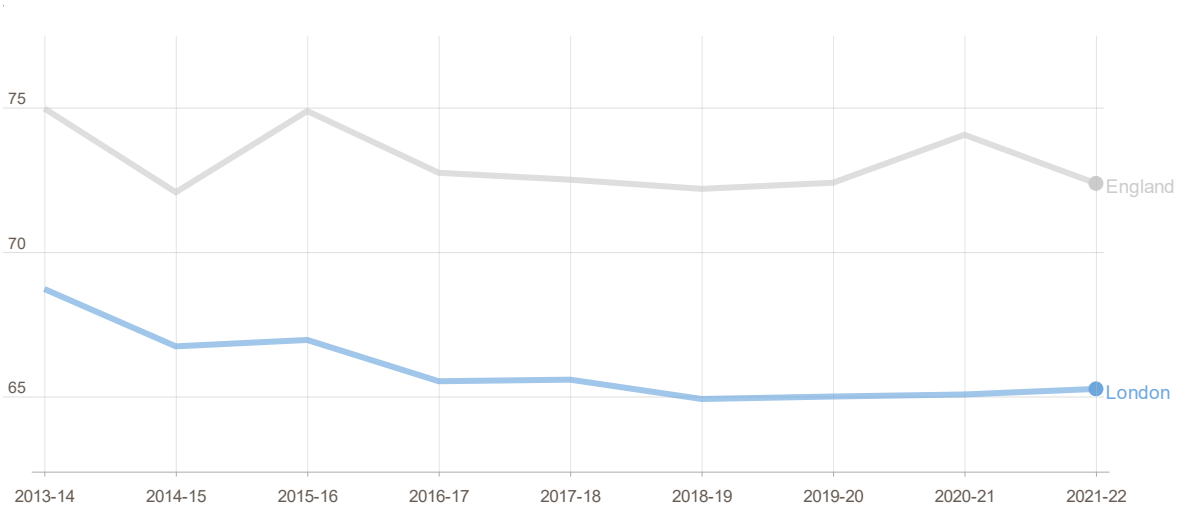
Before the pandemic, MOPAC had been tracking the extent to which residents had thought hate crime was a problem in their area through their Public Attitude Survey (PAS). In each quarter of financial year 2018-19, around 10-11% of adults thought it was a major or minor problem. In each quarter of financial 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, reaching a low of 21% in Q3 2023 but rising slightly to 23% in Q4 2023.

Relationships

Figure 11: Talking to neighbours

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



Source: DCMS, Community Life Survey

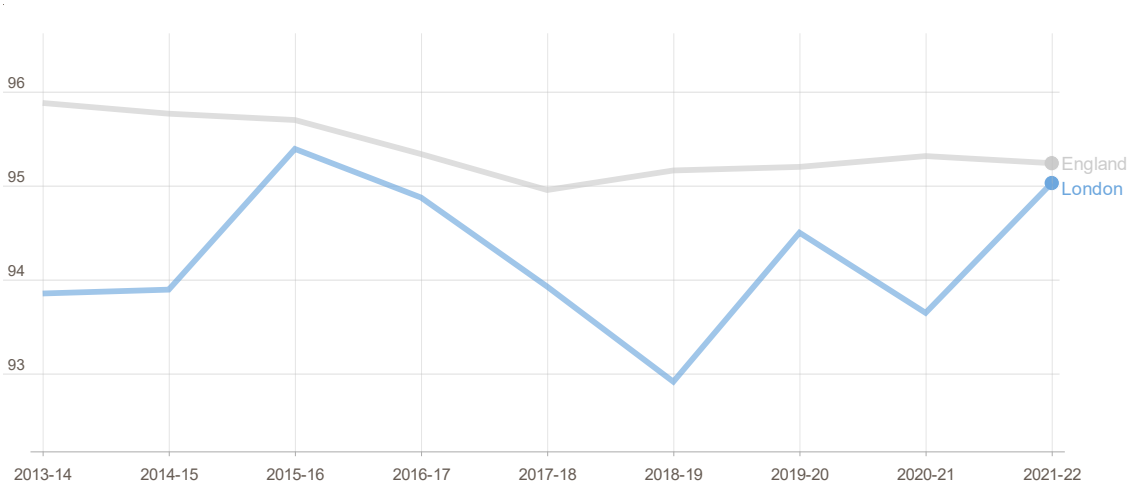
In 2021-22, around two thirds of Londoners (65%) reported chatting to their neighbours at least once a month. This is less than residents across England (72%).

Talking to neighbours has regularly been lower in London compared with England since 2013-14 (on average, by 7pp). 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

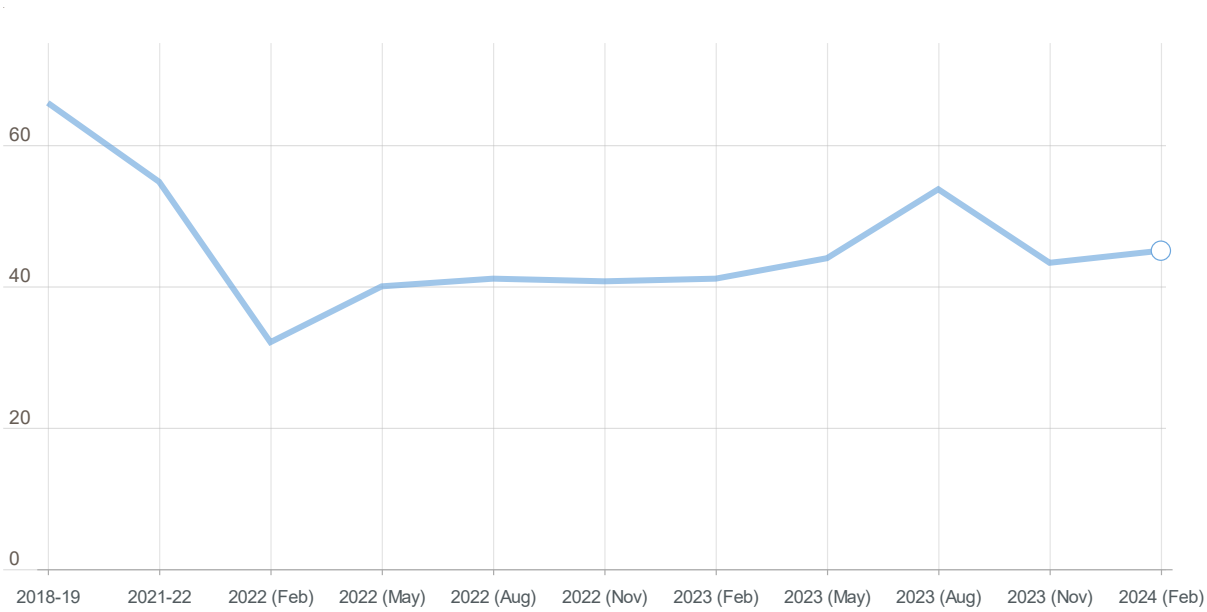
In 2021-22, the majority of Londoners (95%) did agree that there were people who would be there for them if they needed help.

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 (%)



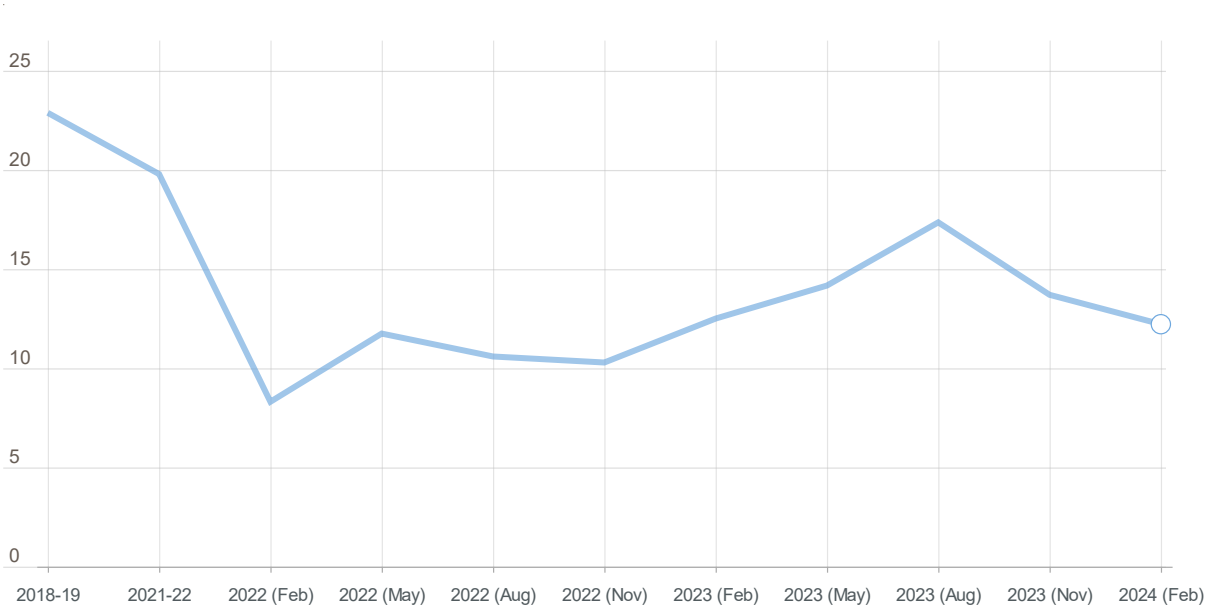
Source: Survey of Londoners 2018-19, Survey of Londoners 2021-22 and GLA/YouGov

The Culture Strategy for London outlines the Mayor's aim of 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 dropped 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 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 such events in the previous month, but this returned to a similar level as before (45%) by February 2024.

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

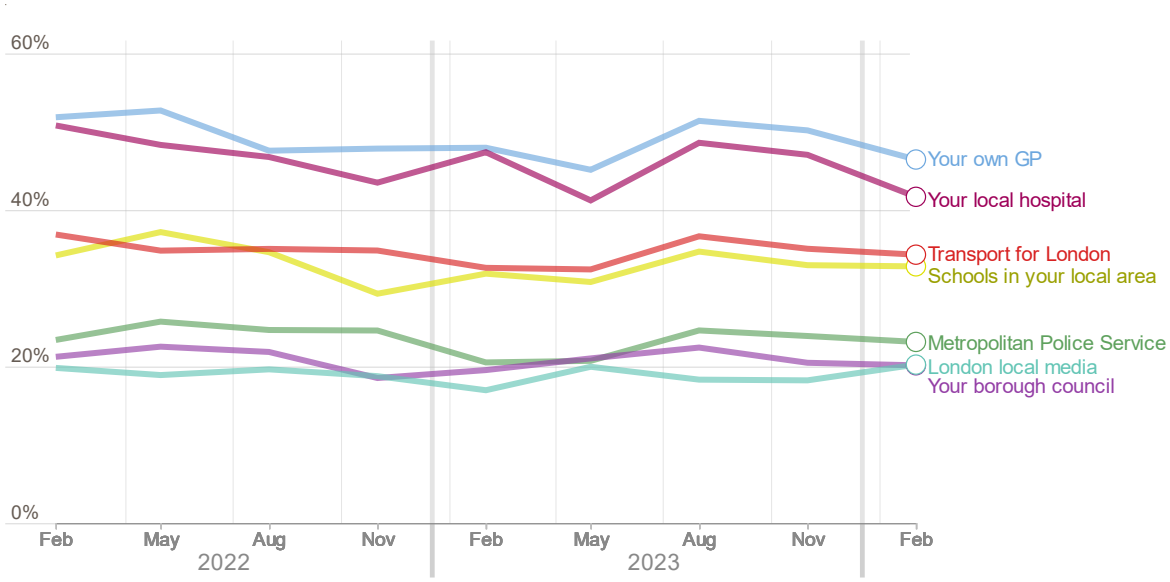
The Survey of Londoners also captured participation in sport. In 2018-19, around a quarter of Londoners aged 16+ (23%) had played sport in the previous month, but this declined to 20% by the time of the 2021-22 survey. When polled in February 2022, 8% of Londoners had played sport in the last month and this increased during Summer 2022 to 12% in May 2022, before slightly decreasing to 10% by November 2022. Over the course of 2023, the proportion of Londoners that had played sport in the previous month increased, peaking in August 2023 at 17% before returning to previous levels (12%) by February 2024.

This decrease in culture and sports participation between the two Surveys of Londoners may be partly attributable to the Omicron variant of Covid, which led to restrictive measures during December 2021 and January 2022. 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 February 2024, trust in around half of the seven services presented to Londoners had returned to similar levels as those back in February 2022, with trust in their own GP, their local hospital and Transport for London being lower than then (46%, 52% and 42% compared with 51%, 34% and 37% respectively).

Of the seven services presented to Londoners, Londoners are most trusting of medical institutions; their own GP (46%) and their local hospital (42%) were most likely to be scored as trustworthy. Trust in local schools was at 33% in February 2024 and is fairly stable over time, with May 2022 a particular high point (37%) and November 2022 significantly lower (29%).

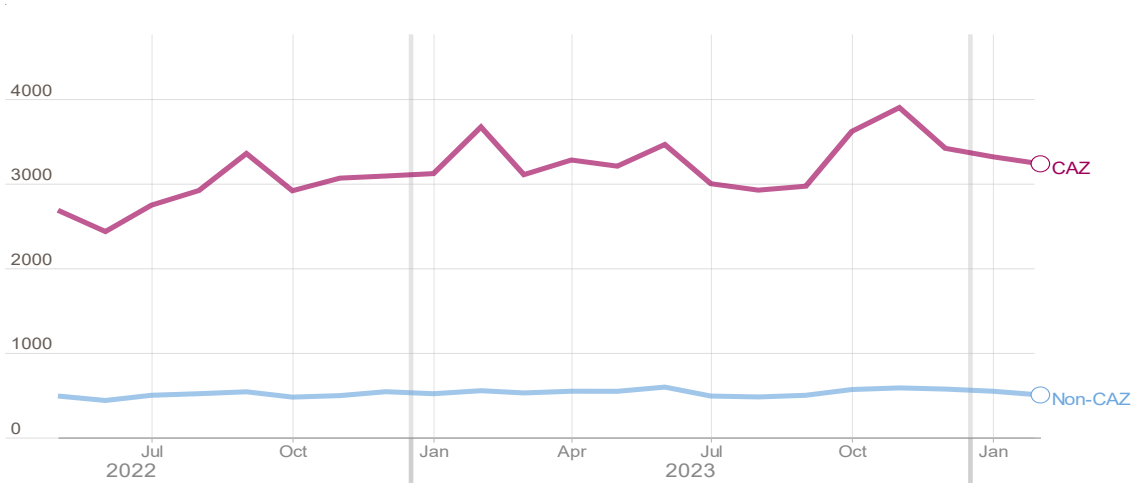
In February 2022, trust was lowest for London media, borough councils and the Metropolitan Police Service (MPS). This remained the case in February 2024, with trustworthiness percentages standing at 20%, 20% and 23% respectively.

Public perception of trust in the 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 Q3 2023/24 has the proportion of respondents agreeing that the MPS is an organisation that they can trust at 70%. This compares to 80% in Q3 2020/21. As well as methodological differences, the

question used in the PAS is very different to the question in the GLA's polling, 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. 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 scaled up to the full population of the UK within regions[68].

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 February 2024, mean footfall across non-CAZ areas was 503 visitors (slightly greater than the mean of 491 in May 2022).

There has been more fluctuation in mean footfall levels in CAZ retail areas. When data first started being collected, the average was 2,686 visitors. It dipped in the next month before climbing to a high of 3,356 in September 2022. During 2023, it peaked at 3,899 visitors in November. The average has fallen slightly since then, with the latest data from February 2024 sitting at 3,235 visitors (20% higher than May 2022).

This would suggest that retail activity in the CAZ rebounded throughout 2023 and into the early part of 2024, with other data showing that weekend spending in the CAZ is back to levels last seen prior to the pandemic[69].

[68] The data might not match up with other estimates of CAZ/non-CAZ counts due to methodological differences.
[69] According to aggregated and anonymised data by Mastercard.

10: CRIME & SAFETY

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

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

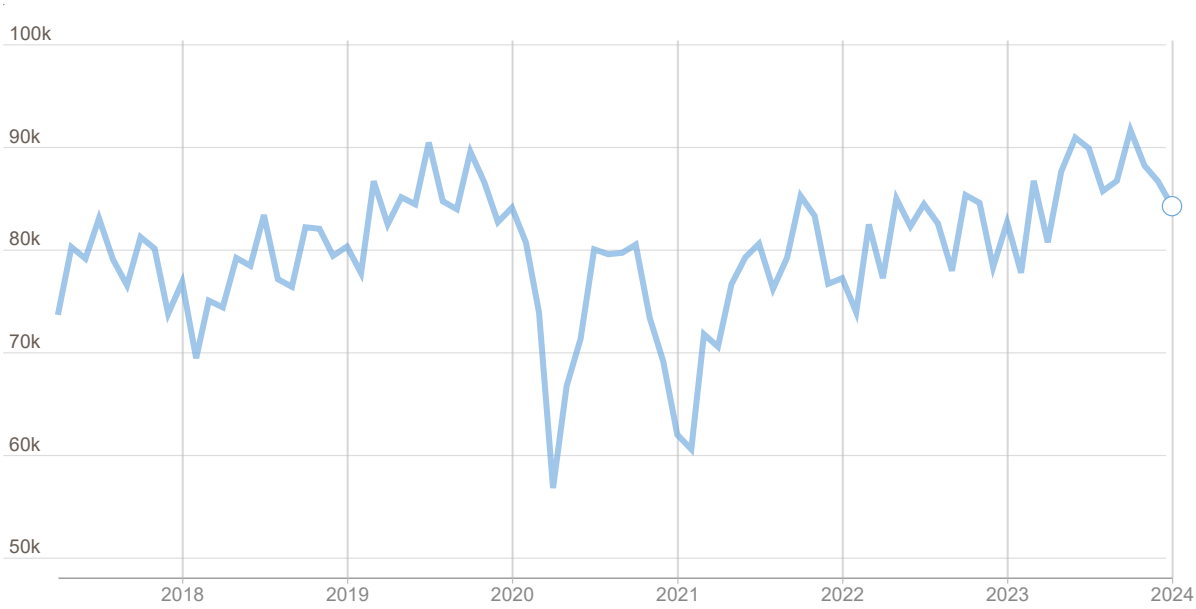
The indicators are all presented at the London level and are primarily derived from publicly-available dashboards, including MOPAC's Victims and witnesses are better supported dashboard, the NFIB (National Fraud Intelligence Bureau) Fraud and Cyber Crime Dashboard, and the MPS (Metropolitan Police Service)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



Source: MPS Monthly Crime Dashboard. Does not include any Domestic Abuse (DA) offences.

The pandemic and associated lockdowns impacted heavily on crime and disorder in London. As shown in Figure 1, recorded total crime[70] reduced considerably during these periods, although differences were observed across different types of crime.

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

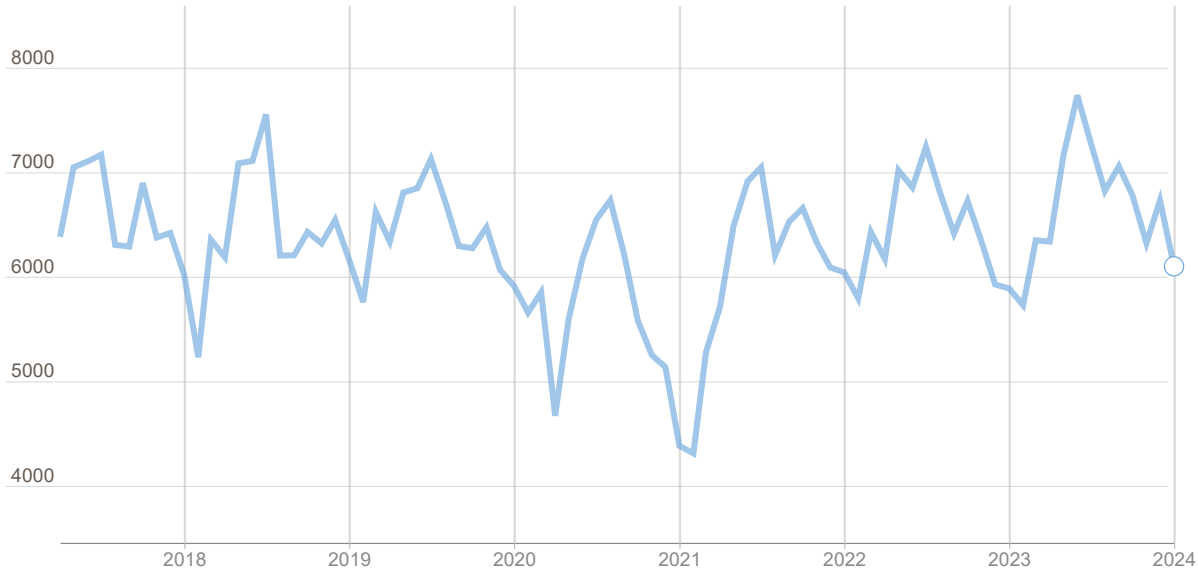
This disparity continued into the recovery period, with some types of crime surpassing pre-pandemic levels and others remaining below them.

Overall, a rise in offending levels is shown over the course of the recovery period. January-December 2023 saw a 6.5% increase in offences (TNOs) compared to the previous 12-month period (1,036,014 versus 972,540; or 115.4 offences per 1,000 people versus 108.3).

Violence

Figure 2: Non-Domestic Violence with Injury Offences

Number of offences recorded by the MPS



Source: MPS Monthly Crime Dashboard. Does not include any Domestic Abuse (DA) offences.

The pandemic led to lower levels of 'violence with injury offending' recorded by police. In subsequent months, the lockdown periods were linked to steep reductions in offending, while their conclusion was linked to steep increases.

During 2021, an increase was observed, with offending rates back to pre-pandemic levels. This was maintained throughout 2022 and 2023, with offences up by 3.1% compared to the previous 12-month period (80,215 versus 77,811; 8.9 offences per 1,000 population versus 8.7).

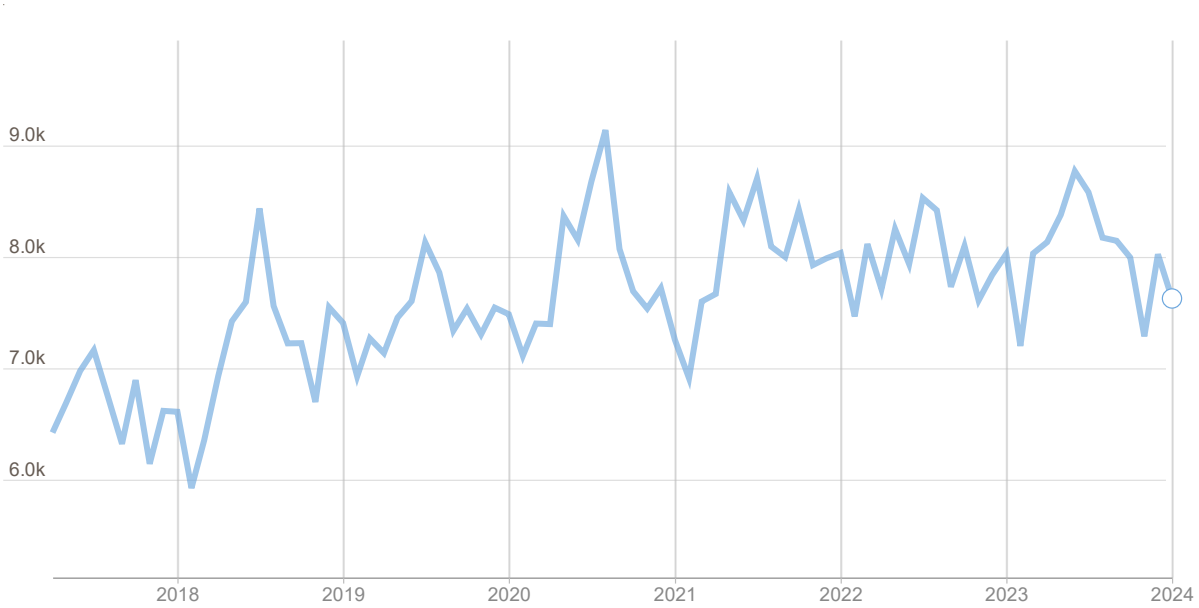
August 2023 to January 2024 saw a 1.9% reduction in offences compared to the previous 6-month period (39,813 versus 40,598), but a 4.3% increase compared to the same period in 2022-23 (39,813 versus 38,149).

January 2024 saw a 9.4% reduction in offences compared to December 2023 (6,100 versus 6,732), but a 3.3% increase compared to January 2023 (6,100 versus 5,904).

Offences in January 2024 were 3.3% higher than in January 2020 (6,100 versus 5,905).

Figure 3: Domestic Abuse Offences

Number of offences recorded by the MPS



Source: MPS Monthly Crime Dashboard. The data in the chart refers to Domestic Abuse Offences, not Domestic Abuse Incidents. There is no specific offence of Domestic Abuse. Domestic abuse-related offences are defined as any incident 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 reporting improvements.

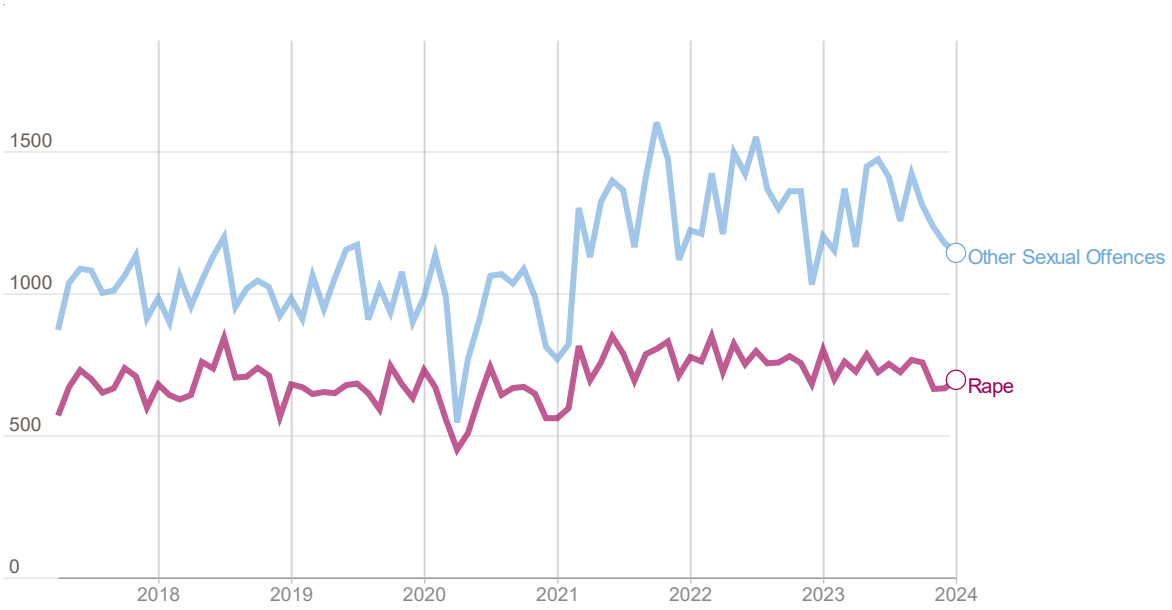
Since 2018, there has been an increase in the level of Domestic Abuse offences recorded by the police, with increases broadly levelling off in 2023. The period January to October 2023 witnessed a 2% increase in Domestic Abuse compared to the same period in 2022; it represented a 14% increase on the same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

January-December 2023 witnessed a 1.1% increase in Domestic Abuse offences compared to the same period in 2022 (96,669 versus 95,606). Offences peaked in June 2023 (8,770, which is the second-highest monthly offending total in the last six years, after August 2020). The lowest number of offences during this time was observed in November 2023 (7,287).

A 10.1% increase in offences was observed between November and December 2023, compared to 2.9% during the same period in 2022.

Figure 4: Sexual Offences

Number of offences recorded by the MPS



Source: MPS Monthly Crime Dashboard Data. Chart distinguishes Rape Offences from Other Sexual Offences, which are collectively referred to as "Sexual Offences.

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

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

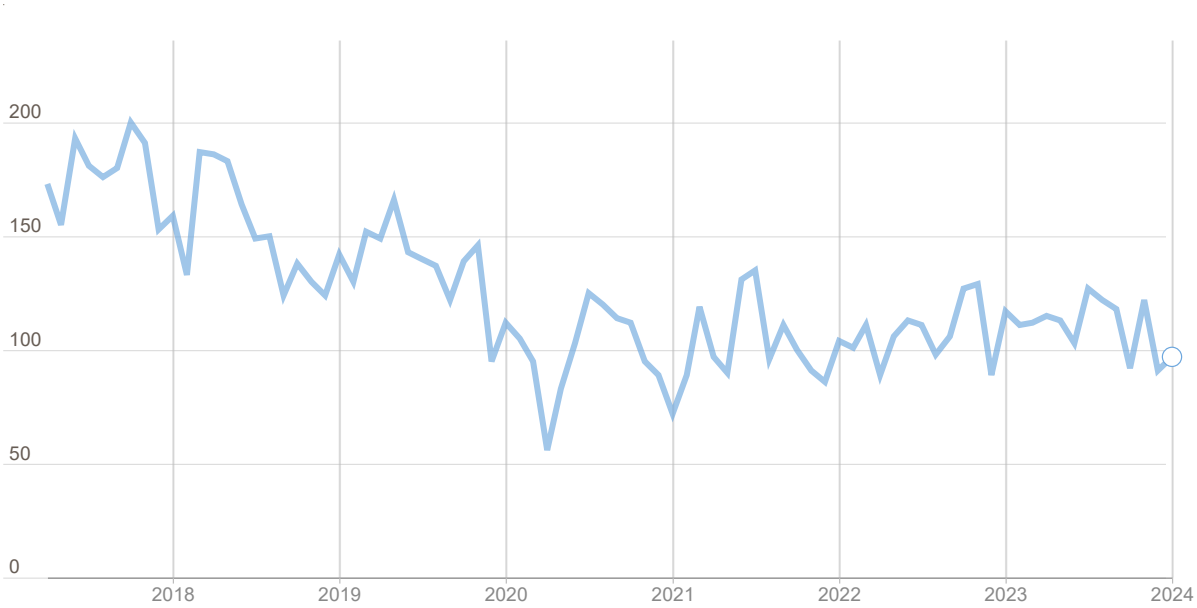
Overall, Sexual Offences reduced by 3.4% in 2023 compared to 2022 (24,190 versus 25,045), with a general downward trend observed since September 2022.

Within this wider category, Rape offences decreased by 5.3% in 2023, compared to the same 12-month period in 2022 (8,751 versus 9,244). The level of Other Sexual Offences decreased by 2.3% compared to 2022 (15,439 versus 15,801).

The proportion of offences classified as Rape continues to account for just over a third of total Sexual Offences (36%), which 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



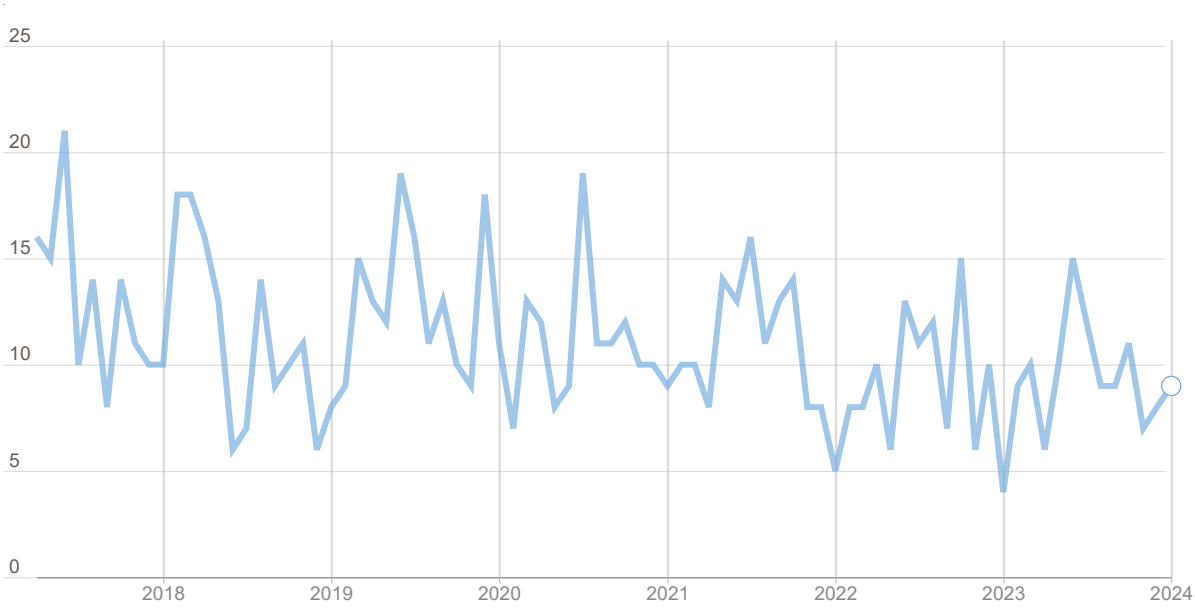
Source: MPS Monthly Crime Dashboard. Refers only to offences where a victim is under-25 and has been injured in a Non-Domestic Abuse knife incident. Age qualifier only refers to victims not offenders.

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

Since 2020, the total number of offences has increased, although the recorded number is still lower than it was pre-pandemic. During 2023, recorded offences increased by 4.5% compared to 2022 (1,343 versus 1,284).

Figure 6: Homicide Offences

Number of offences recorded by the MPS



Source: MPS Monthly Crime 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.

Homicide offences stabilised during 2023, compared to the previous 12-month period (110 versus 109), peaking in June (15). There were fewer offences from October to December 2023, compared to the same period in 2022 (26 versus 31).

Of the 109 homicides recorded in 2023, 12.8% (or 14) were classified as Domestic Abuse homicides. During the same period, 68% of homicides (74) involved the use of a knife/sharp instrument. Males are still over-represented as victims (82.5% of all victims in 2023), while 44% of all homicide victims were under-25.

Acquisitive Crime

Figure 7: Personal Robbery

Number of offences recorded by the MPS

Source: MPS Monthly Crime 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.

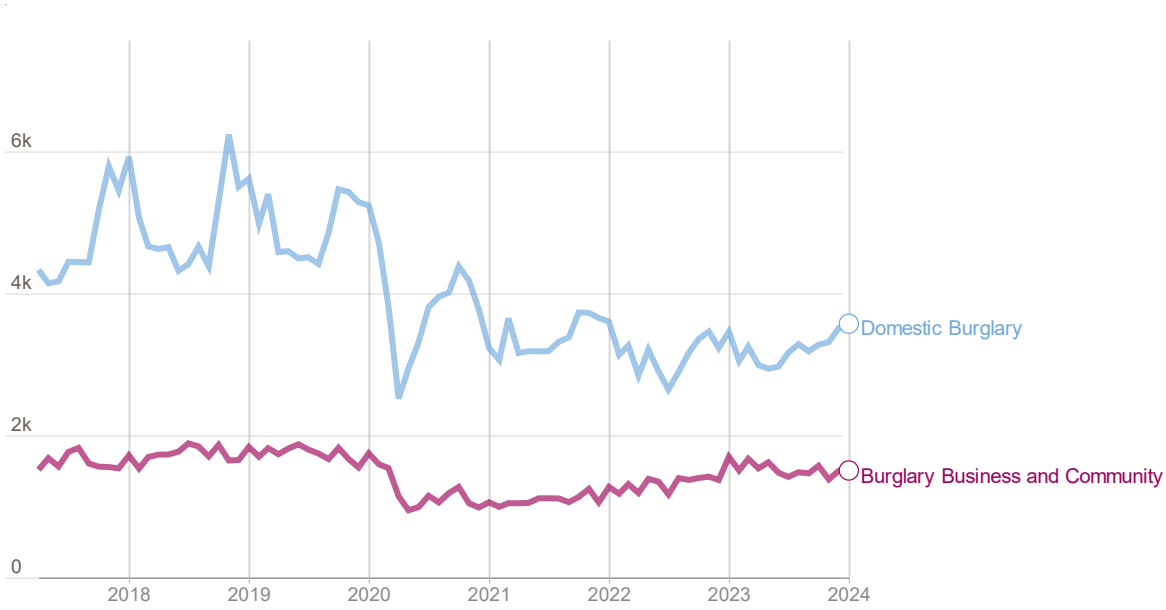
The upward trend shown in 2021 continued throughout 2022, and by early 2023, offending returned to levels last seen in 2018, although significantly lower than in 2019.

There were 18.9% more Personal Robbery offences recorded in 2023 than in 2022, and 42.4% more than in 2021.

Recorded offences reduced in January 2024, compared to those observed at the end of 2023, but still reflect a 7.3% increase compared to January 2023.

Figure 8: Burglary Offences

Number of offences recorded by the MPS



Source: MPS Monthly Crime Dashboard. As per the chart, the category of Burglary offences comprises a combination of Business and Community Burglaries (Non-Domestic) and Domestic Burglaries.

Pre-pandemic, both Domestic 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. Domestic Burglaries fell 43% compared to April 2019 levels, while Business and Community Burglaries fell 27% over the same period.

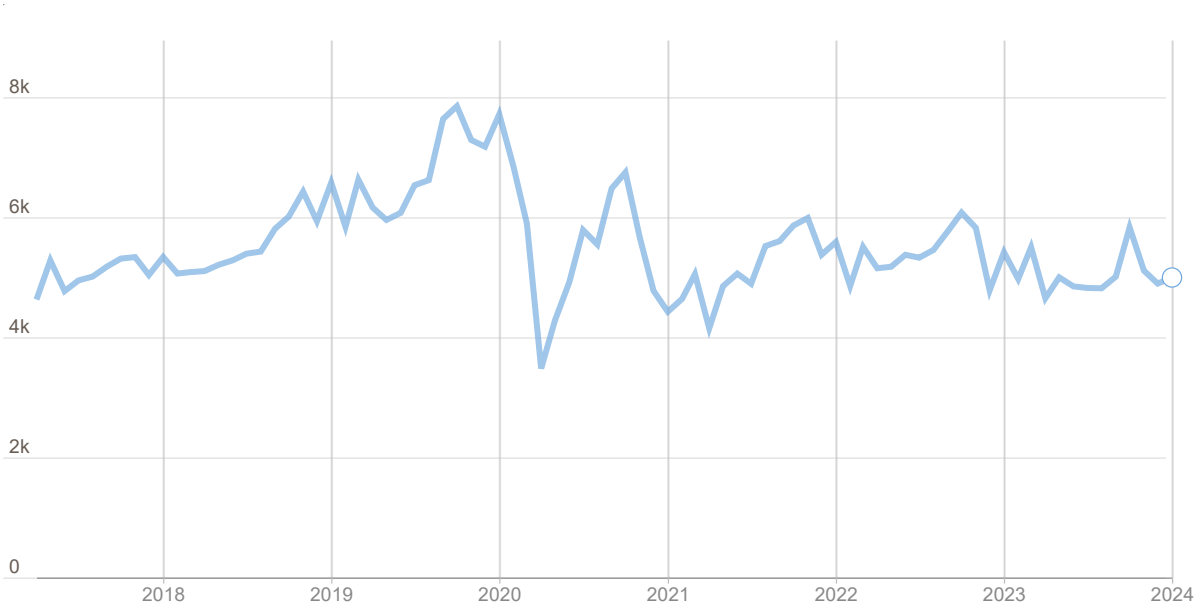
Following this dip in offending, overall burglary levels have remained lower than before the pandemic. Residential Burglaries fell below 3,000 a month in the middle of 2022 but have since returned to a level of 3,000 to 3,500 a month. In contrast, Business and Community Burglary has seen an upward trend in offending since March 2021.

During 2023, recorded Burglary offences increased by 5.9% compared to 2022 (56,777 versus 53,609). The proportion of total Burglaries committed at domestic properties continues to fall, reducing from 75% in 2021 to 67% in 2023.

Business and Community Burglary continued to see an upward trend in 2023, with a 15.8% increase in recorded offences compared to the previous year (18,351 versus 15,845).

Figure 9: Theft from Motor Vehicle Offences

Number of offences recorded by the MPS



Source: MPS Monthly Crime 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.

During 2023, there was a reduction of 6.2% in offending, compared to the year before (60,893 versus 64,897). October remained the peak month for Theft from Motor Vehicle offences, in line with the seasonal trend observed over the last six years.

Figure 10: Theft from Person Offences

Number of offences recorded by the MPS

Source: MPS Monthly Crime Dashboard.

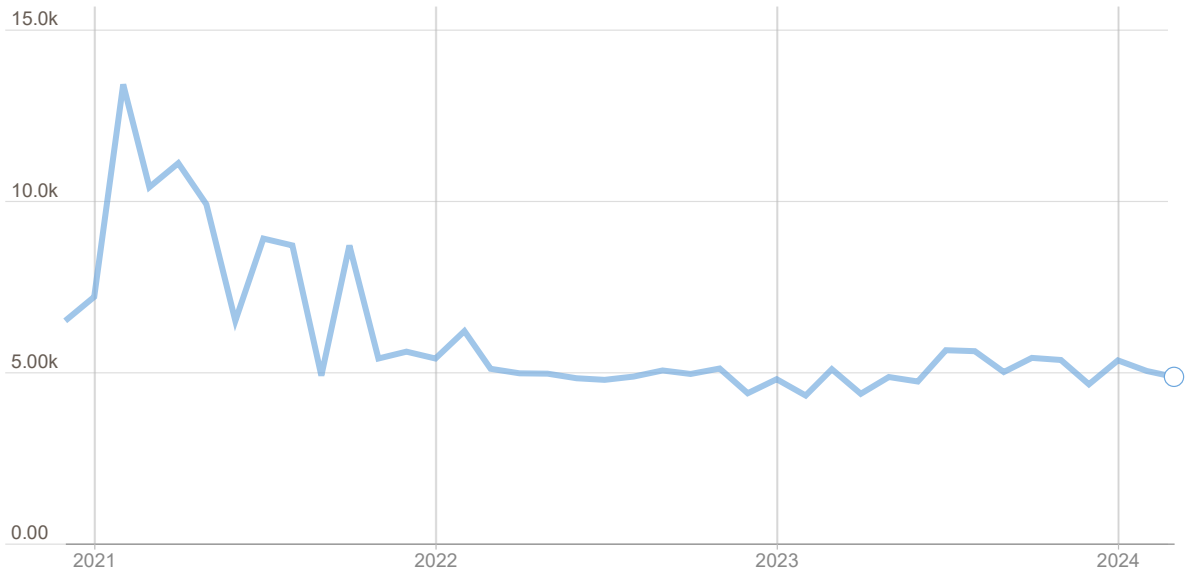
An upward trend in Theft from Person offending was apparent throughout 2018 and 2019, before offences fell sharply at the start of the first national lockdown (with April 2020 offences down 80% on the previous month). Offending levels rose in mid-2020 then fell again during the second lockdown.

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

Recorded Theft from Person offences increased by 26.5% in 2023 compared to the same period in 2022 (72,709 versus 57,469). The offending noticeably peaked in November 2023, with a 26.8% increase compared to October and a 68.9% increase compared to September. Despite the expected seasonal increase (Theft from Person offences typically peak in the winter months in London), figures recorded in November were higher than any other month in the last six years.

Figure 11: Fraud and Cyber Crime

Number of offences reported to Action Fraud



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. Data is only provided on the dashboard for the most recent 12-month period, hence the more limited time series presented on the chart.

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

Of the 56,077 reports recorded in the most recent 13-month period, 88.4% related to fraud (49,617) and the remaining 11.6% related to cyber-crime (6,460). Collectively, these incidents resulted in a total loss of £450.6 million.

Individuals were recorded as the victims much more frequently than organisations (90% versus 10%). While no gender differences in victimhood were found, younger individuals (those aged 20-39) were more likely to have been victims.

Safety

Figure 12: Anti-Social Behaviour (ASB)

Number of calls received by the MPS

Source: London Datastore, MPS Anti-Social Behaviour dataset. The data in the chart refers to calls made to the MPS to report ASB (based on Opening Type Code 1) and does not reflect the distinct number of ASB incidents. There may be more than one ASB call to the same ASB incident. Dataset may contain duplicate calls to the same incident.

While total ASB calls received by the MPS are a combination of Personal, Nuisance and Environmental ASB calls[71], the vast majority (87%) relate to Nuisance ASB.

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

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

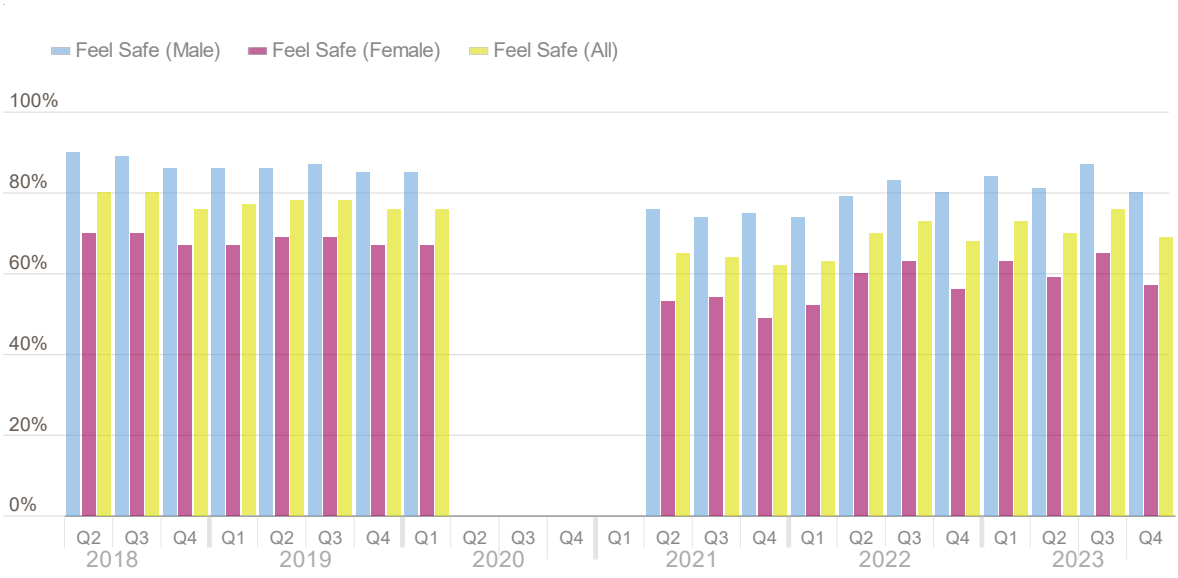
Following the spike in ASB calls at the beginning of the pandemic, calls reduced from summer 2020 onwards, so that by mid-2022 they fell below levels seen in 2019 (before the pandemic). From February 2023 to the early summer, there was a steady increase in ASB calls before a slight tail-off through to November 2023.

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

The level of ASB calls increased by 2% in 2023 compared to 2022 (245,141 versus 240,024), although it remained lower than annual levels between 2019 and 2021.

Figure 13: Feeling of Safety after Dark

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



Source: MOPAC Public Attitude Survey, Public Voice pack. Due to the pandemic, there are no data for parts of 2020 and 2021.

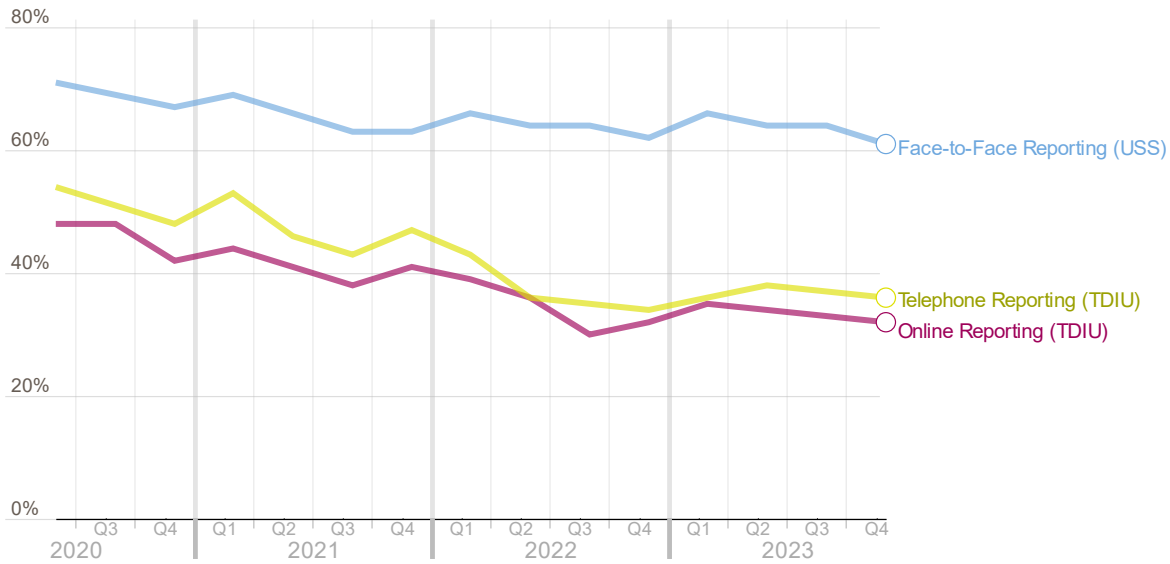
A greater proportion of female respondents feel unsafe walking alone in their local area after dark than male respondents.

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

In the most recent quarter (Q3 2023-24), 80% of males felt safe walking alone in their local area after dark, compared to 57% of females. Both proportions are a reduction from the quarter before, although it should be noted that the quarterly data points are fairly fluid.

Figure 14: 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 Q3 2023-24. Demographic comparisons based on the R12 period to Q3 2023-24. Chart shows victim satisfaction levels by three difference crime reporting methods (face-to-face, online and telephone).

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

Levels of satisfaction for reporting victims are significantly higher for victims reporting crimes face-to-face (61%) than for victims using online or telephone reporting. Victims reporting crimes online generally had the lowest overall satisfaction level in recent years (data available up to Q3 2023-24).

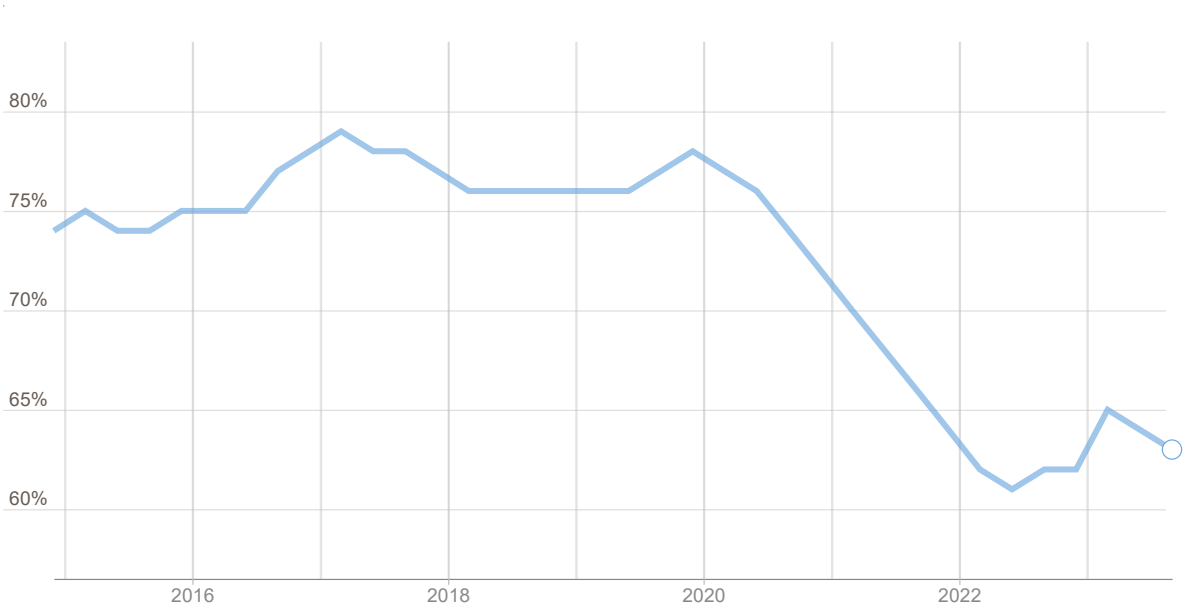
The divergence in trends of satisfaction according to reporting method is widening. Victim satisfaction for face-to-face crime reporting has been broadly stable over the last four years, but satisfaction levels for crimes reported by telephone and online have declined over this period by 17 and 15 percentage points (pp), 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 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 15: Fair Treatment by the Metropolitan Police Service

Percentage of survey participants (PAS) who agree that the police treat everyone fairly regardless of who they are



Source: MOPAC Trust and Confidence dashboard. Data derived from the Public Attitude Survey (PAS). R12 month datapoints.

Between 2020 and 2021, the percentage of survey respondents who agreed that the police treat everyone fairly, irrespective 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, the rate has 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.

Just over two-thirds of the people surveyed in 2023 responded (69%). The respondents least likely to agree that the Police treat everyone fairly were young people aged 15-24.

Respondents of Black (58%) and Mixed (58%) ethnicities were less likely to agree with this sentiment than respondents from other ethnic groups.

Meanwhile, the proportion of LGBT+ respondents who agreed with the statement was significantly lower than that for non-LGBT+ respondents (52% versus 70%).

11: TRANSPORT & DIGITAL INFRASTRUCTURE

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

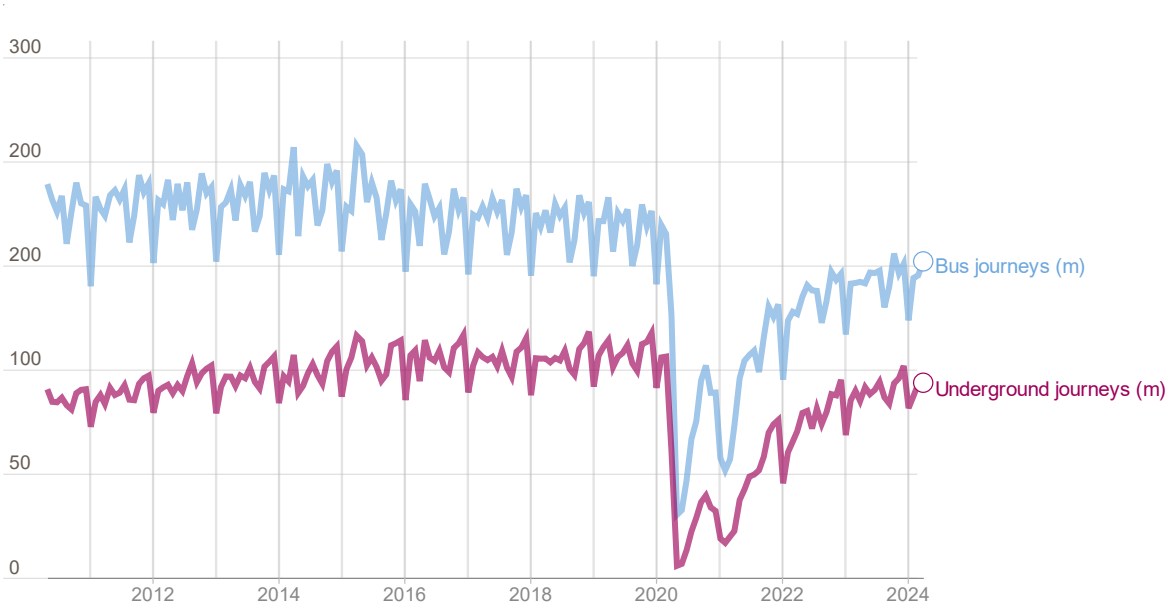
The transport section draws mainly on summary indicators from the 'Travel in London' (TiL): Annual Overview report, an annual publication by TfL which provides trends and developments related to transport and travel in London. It focuses on those indicators that form part of a data-led tracker that TfL 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 journeys on the public transport network by TFL reporting period, by type of transport



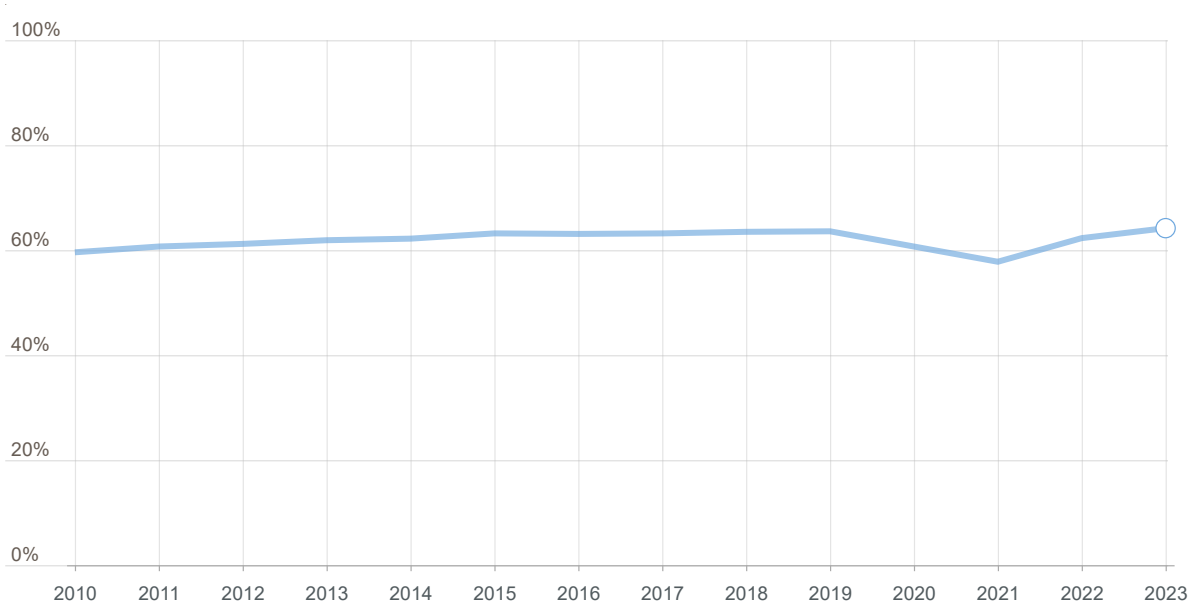
Source: London Datastore. Data is shown by financial period. See the TfL Network demand dashboard for most up-to-date data.

In 2023, demand for the Tube rose by 18%, and bus demand increased by 8% compared with the same financial periods in 2022, following the initial post-COVID recovery phase. During early 2024, there was a further increase in demand, with Tube services experiencing an 8% rise and buses a 4% increase (compared with the same financial period in 2023).

As of March 2024, demand stood at 85% of pre-pandemic levels for buses and 84% for the Tube, measured against the equivalent week in 2019[72].

Figure 2: Active, efficient, and sustainable travel

Proportion of trips by active, efficient, and sustainable travel



Source: TfL MTS Tracker.

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. 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.

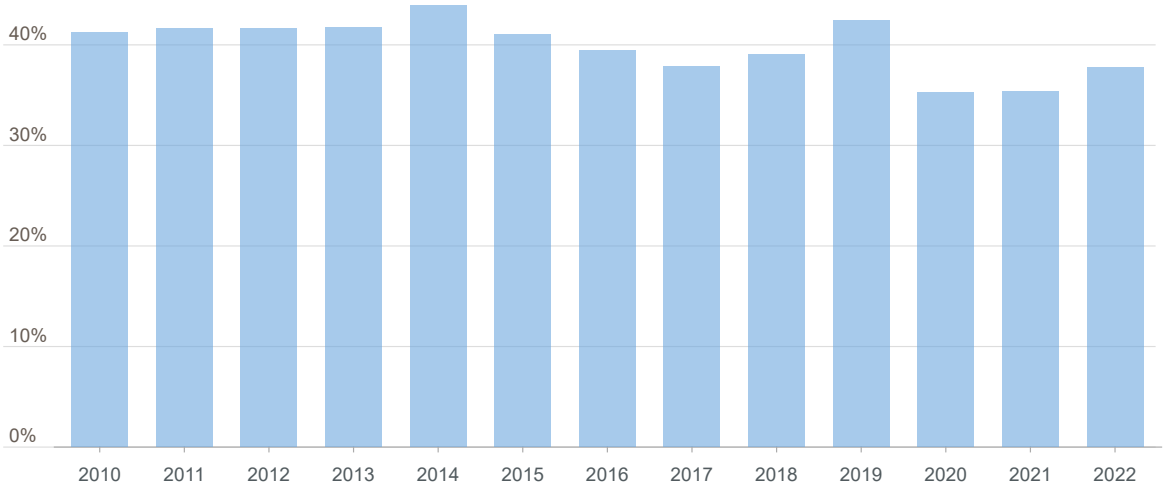
Subsequently, the proportion of trips made by active, efficient and sustainable travel rebounded to 62.3% in 2022. Provisional estimates indicate that in 2023, this metric had reached its highest point within the observed timeframe (i.e., since 2010) at 64.2%. This compares to 63.6% during pre-pandemic 2019.

[72] TfL

Active Travel

Figure 3: Active travel

Proportion of Londoners aged 20+ 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).

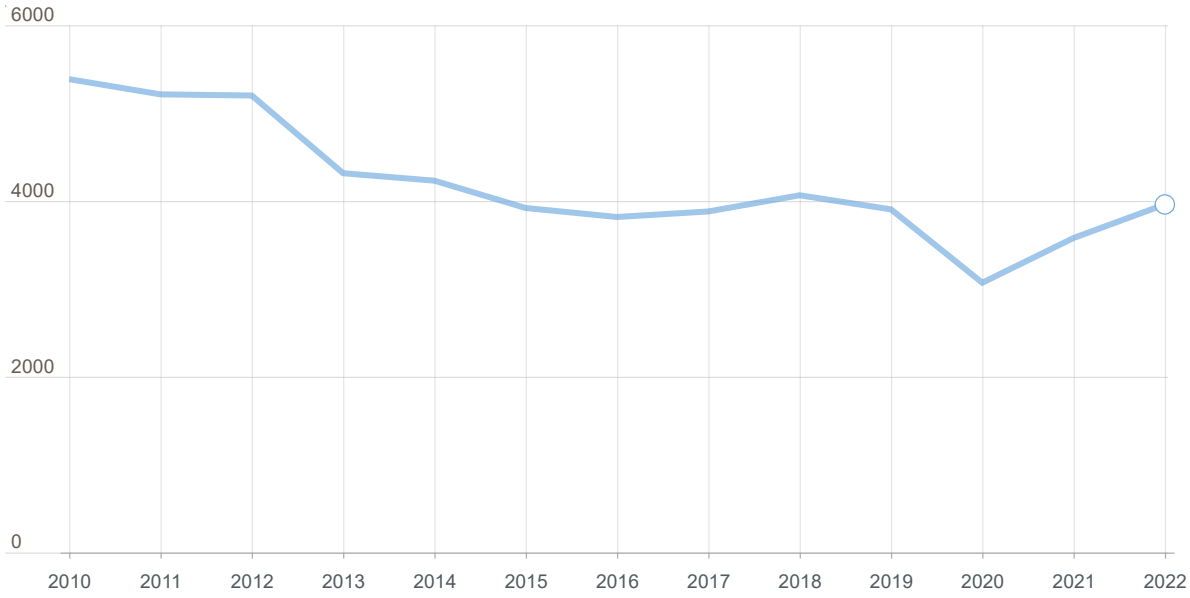
Historically, the proportion of Londoners achieving at least 20 minutes of active travel per day has been relatively flat at around 40%. The pandemic had a mixed effect on this indicator. Increased local and active travel during lockdowns was offset by overall mobility restrictions and a significant decline in public transport usage. Consequently, this measure fell slightly during the pandemic. Recovery from the pandemic has so far been incomplete, with 38% of Londoners achieving the daily 20 minutes in 2022/23, down from around 40% pre-pandemic.

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



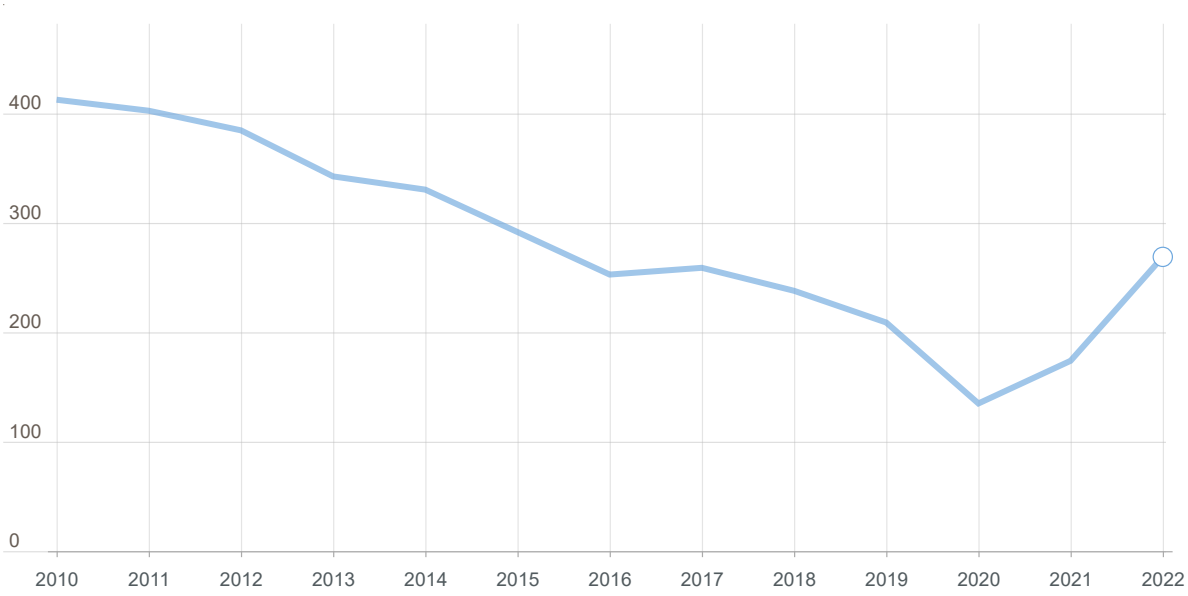
Source: TfL 'Travel in London 2023'.

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. However, 2022 saw a reversion to numbers and patterns of injury seen prior to the pandemic, as travel increased. These changes led to a 2% increase in the number of people injured (all severities) in road traffic collisions in London relative to 2021, and an 11% 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% and the total number of injuries was down by 12%.

Figure 5: Safety on the bus network

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



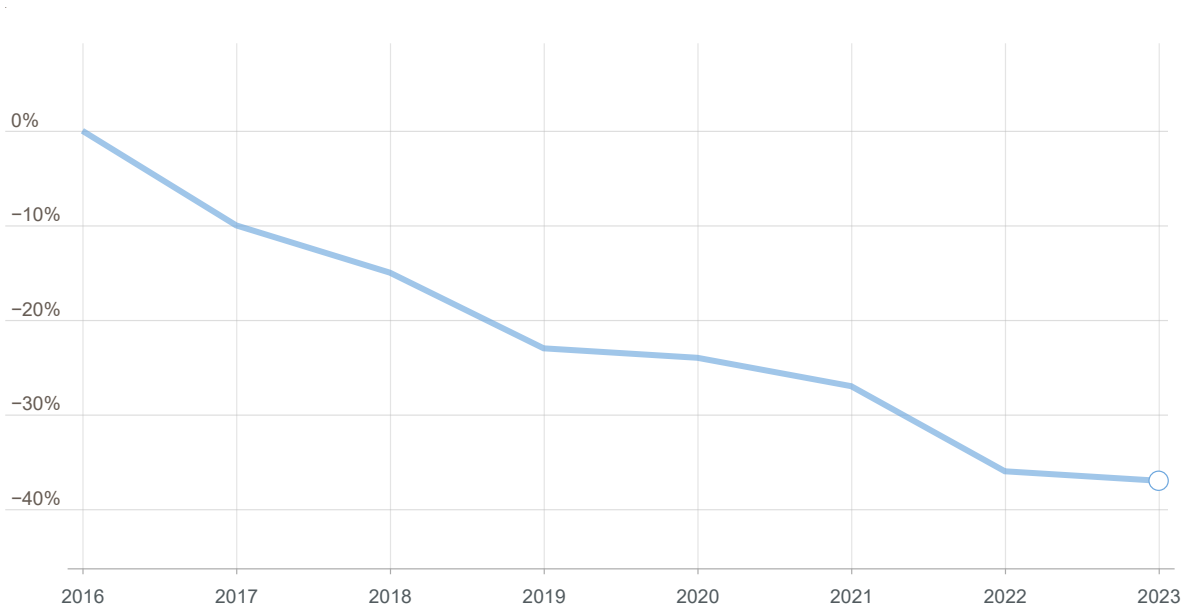
Source: TfL 'Travel in London 2023'.

The number of people killed or seriously injured in or by a London bus declined from 413 in 2010 to 135 in 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 in or as a result of collisions involving buses increased by 14% 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 from 2016 baseline in the additional journey time using only the step-free transport network (%)



Source: TfL MTS Tracker. Negative values represent greater accessibility due to reduced additional journey time using the step-free network. Since the previous State of London publication, this data has been revised to reflect updates to TfL models used to forecast the metric. Historic data has therefore been revised to align with this new methodology.

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 harder to get around, and often face longer journeys if they are only able to use the step-free network.

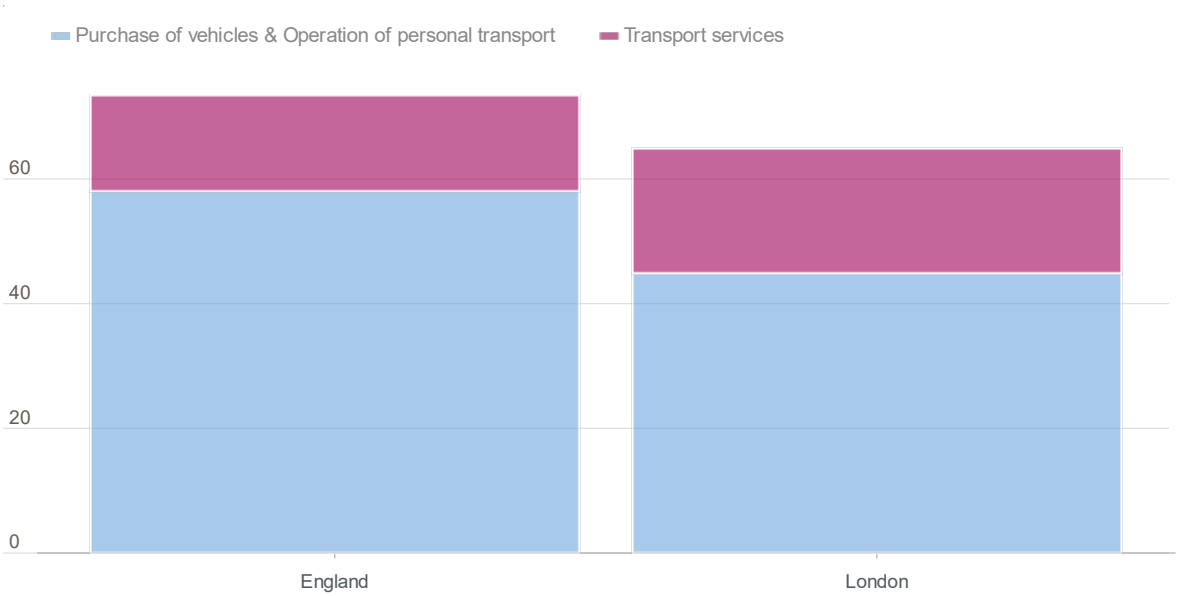
TfL measure the physical accessibility of the network by comparing, for all possible journeys using London's public transport network, the relative additional journey time that would be incurred on average when using only the step-free network against the time required if the whole network was available.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

As of May 2024, 92 Tube stations (over a third of the total), more than 60 London Overground stations and all 41 Elizabeth line stations have step-free access[73]. In 2023, the relative additional journey time metric reduced to 37% below the 2016 baseline, which indicates that the overall accessibility of the network is improving.

[73] TfL Step free access

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.

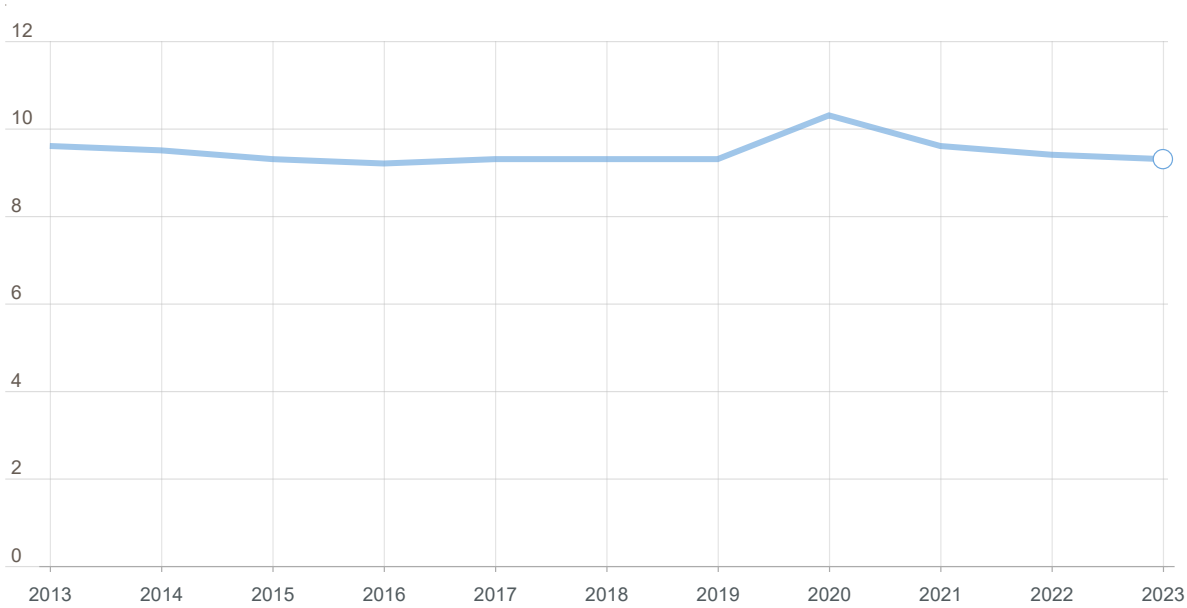
In 2022, Londoners spent £20 per week on public transport (compared to the £15 England average), the second highest region in the UK after the South East. Both London and the South East also had the highest proportion of household expenditure on public transport at 3.3% (which in part reflects residents' 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)



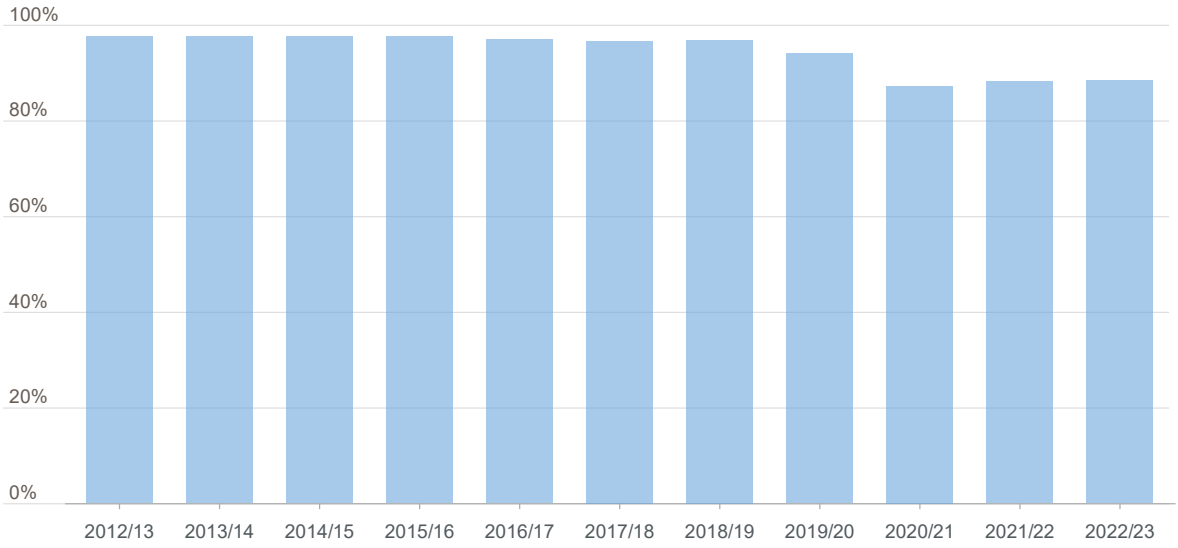
Source: TfL MTS Tracker.

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 9.3 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. Due to the return of car traffic (and therefore congestion) since then, the increase seen in 2020 has fallen back in recent years. In 2021 and 2022, bus speeds declined to 9.6 mph and 9.4 mph respectively. In 2023, bus speeds fell slightly to 9.3 mph.,

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 with 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.

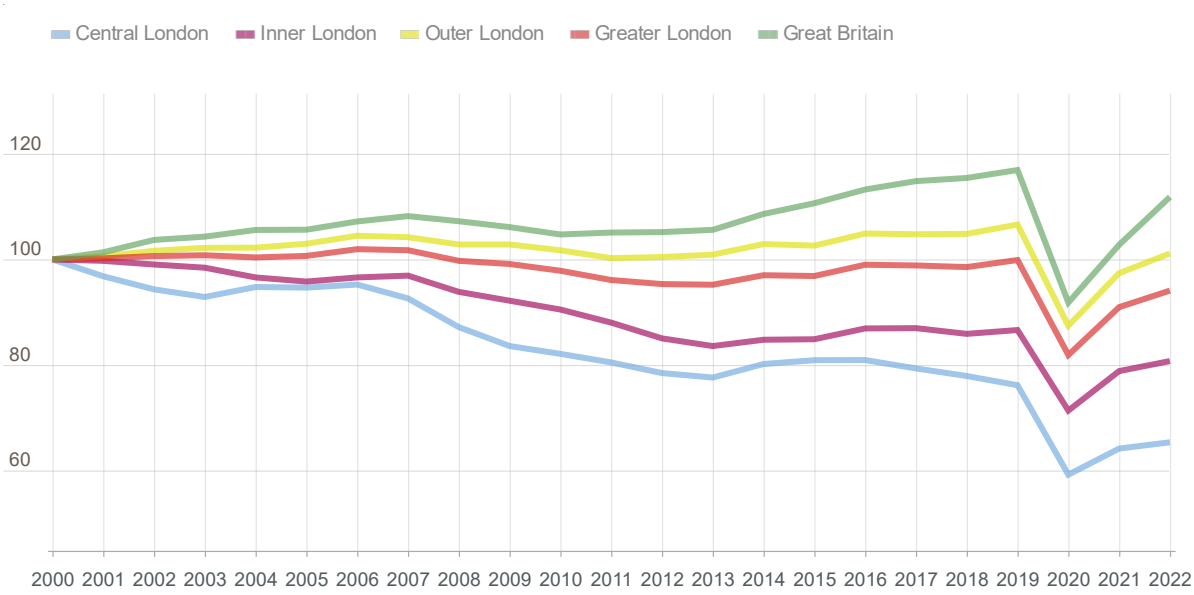
The pandemic started to have an impact on service provision in March 2020 (end of financial year 2019/20). On an annual basis, operated kilometres fell from 94% to 87% between 2019/20 and 2020/21, before increasing to 88.2% in 2021/22. 2022/23 was, however, a particularly challenging one for operational 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 London 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: DfT, quoted in 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 and Great Britain as a whole, 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 6% lower than in 2019.

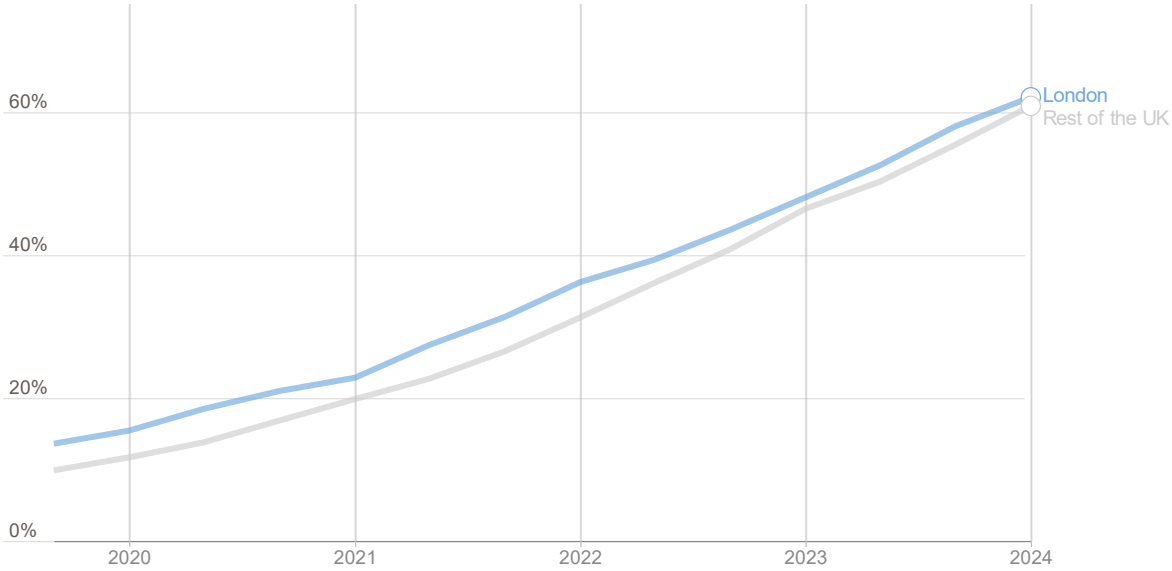
Of particular interest is the diverging trend in traffic growth between different areas of London. Traffic volumes in central London (using a definition different to, and larger than, the central London Congestion Charge zone) have fallen relatively consistently year on year, and in 2022 were 35% below 2000 and 19% below 2016 levels. Equivalent values were 19% and 7% for Inner London, respectively. 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 1% higher in 2022 than 2000 levels, 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

Premises able to access full fibre (%)



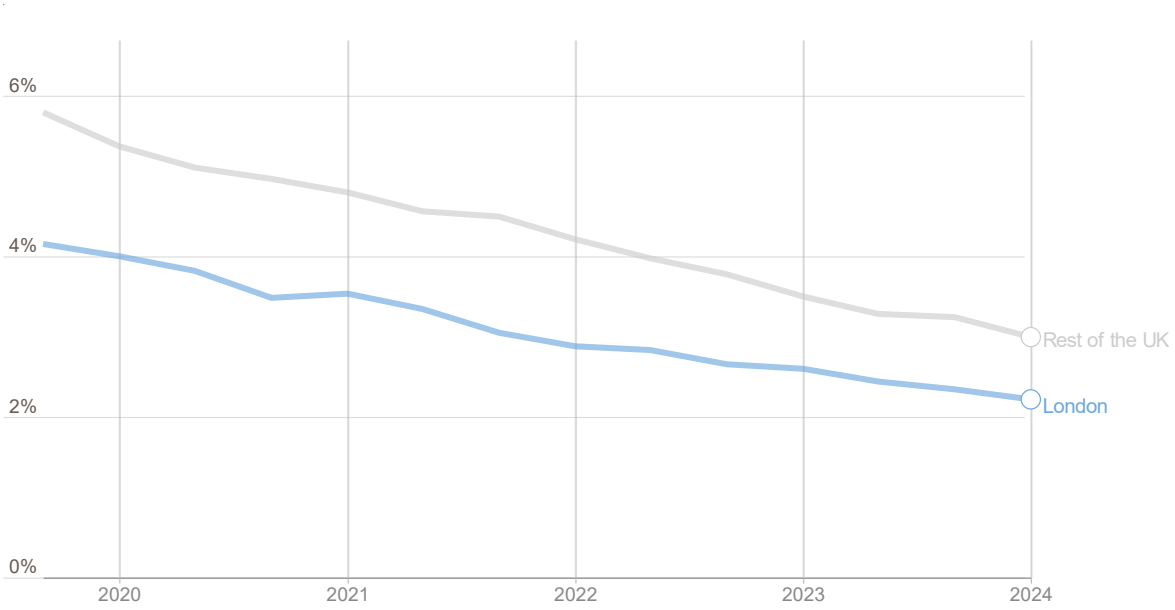
Source: Ofcom

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. As most households use multiple connected devices, consumers need improved download and upload speeds, as well as reliability provided by full fibre, with reduced congestion on services.

Full fibre broadband was available to 62% (or 2.5 million) of premises (business and residential) in London as of January 2024, compared to 61% in the rest of the UK. Over time, the gap in full fibre availability between London and the rest of the UK has been getting smaller. In January 2024, the difference between the two regions was 1 percentage point.

Figure 12: Superfast broadband unavailability

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



Source: Ofcom

Superfast broadband is defined as offering speeds of 30Mbit/s or more, which is increasingly essential as a minimum requirement for most households. 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.

In January 2024, 2.2% of London premises were unable to access internet speeds of 30Mbit/s or more, compared to 3.0% for the rest of the UK. Both London and the rest of the UK have seen a steady increase in the percentage of premises able to receive 30Mbit/s internet speed, as network infrastructure continues to improve. The gap between London and the rest of the UK in terms of access to superfast broadband has been narrowing over time. As of January 2024, the difference between the two regions stood at 0.8 percentage points.

12: YOUNG PEOPLE & EDUCATION

This chapter reports on children and young people (aged 0-25 years). It sets out trends across several indicators covering health and wellbeing, education and safety.

Most of the indicators covered in this chapter are updated annually with the exception of two: number of early-years providers and perceptions of safety for children and young people (both updated quarterly).

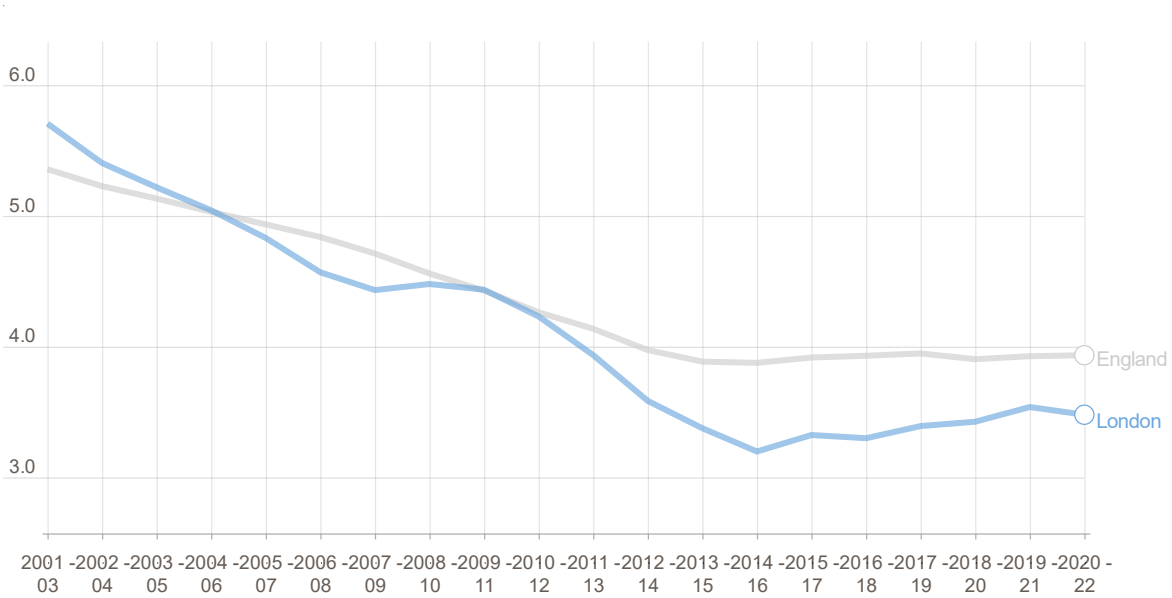
The Mayor is championing inclusive education in London, and is working to tackle child poverty and health inequality across the city. The Health Inequalities Strategy provides more information on health inequalities for children across London.

Child Health and Wellbeing

In 2022-23, there were 2,859,000 children and young people (aged 0-25 years) in London, making up 32.2% of the total population. This includes 525,000 under-5s and 1,897,000 under-18s, comprising 5.9% and 21.4% of the population, respectively[74].

Figure 1: Infant mortality rate

Infant deaths under 1 year of age per 1,000 live births (2001-03 to 2020-22)



Source: ONS

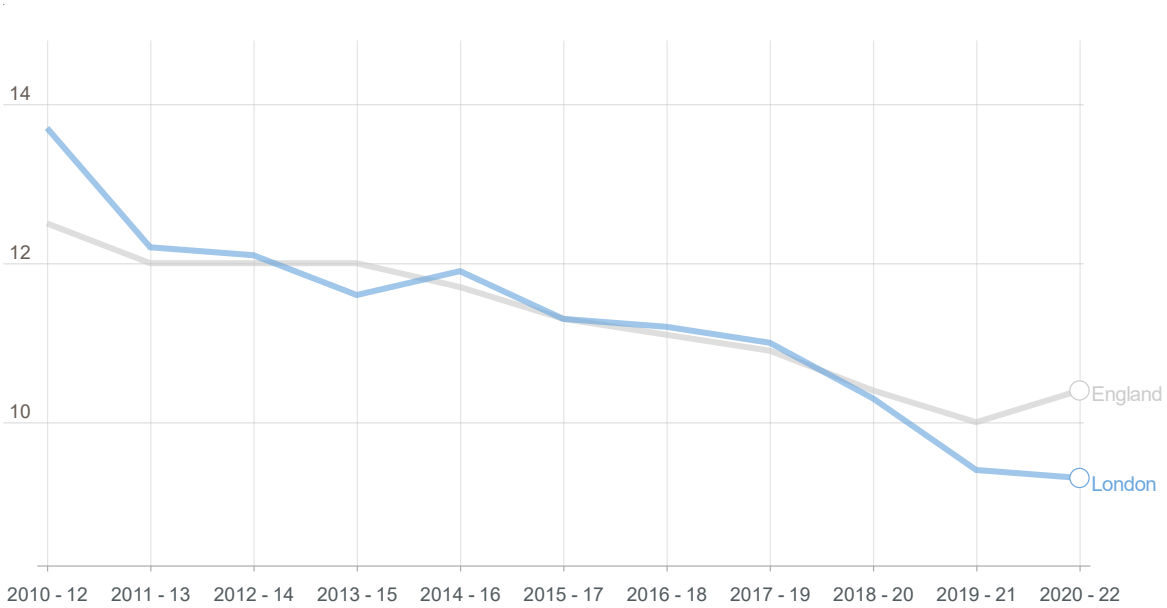
In 2020-22, there were 3.5 infant deaths per 1,000 live births in London, compared to 3.9 in England. This conceals inequalities between boroughs. For example, during that period, the rate was 4.6 in Lambeth compared to 1.9 in Wandsworth.

[74] ONS, mid-year 2020 population data

London's rate decreased by 2.2 points since 2001-03; however, minimal change has been observed since 2012-14.

Figure 2: Child mortality rate

Child mortality rate (rate of death due to all causes for persons aged 1-17) per 100,000 (2010-12 to 2020-22)



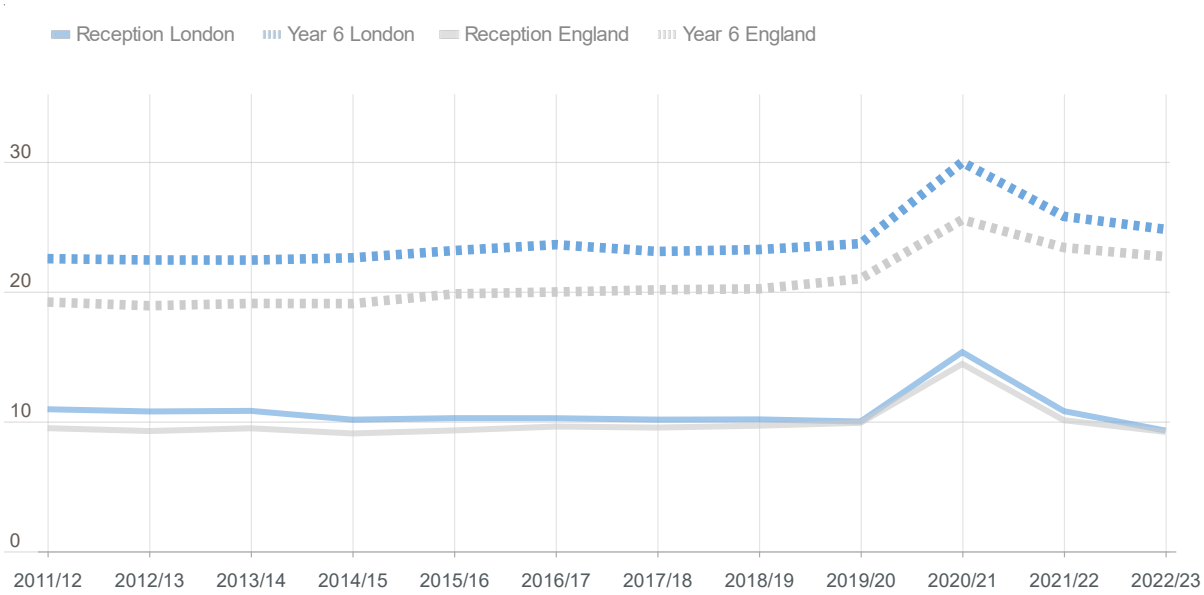
Source: ONS

In 2020-22, the child mortality rate was 9.3 per 100,000 in London, compared to 10.4 in England. London's rate decreased by 4.4 points since 2010-12, compared to a 2.1 point decrease for England. This varies considerably by borough: for example, the rate was 3.6 in Lambeth compared to 13.9 in Westminster[75].

[75] Data for six boroughs unavailable for 2020-22 due to small sample size.

Figure 3: Prevalence of obesity

Proportion of children in Reception and Year 6 that are obese

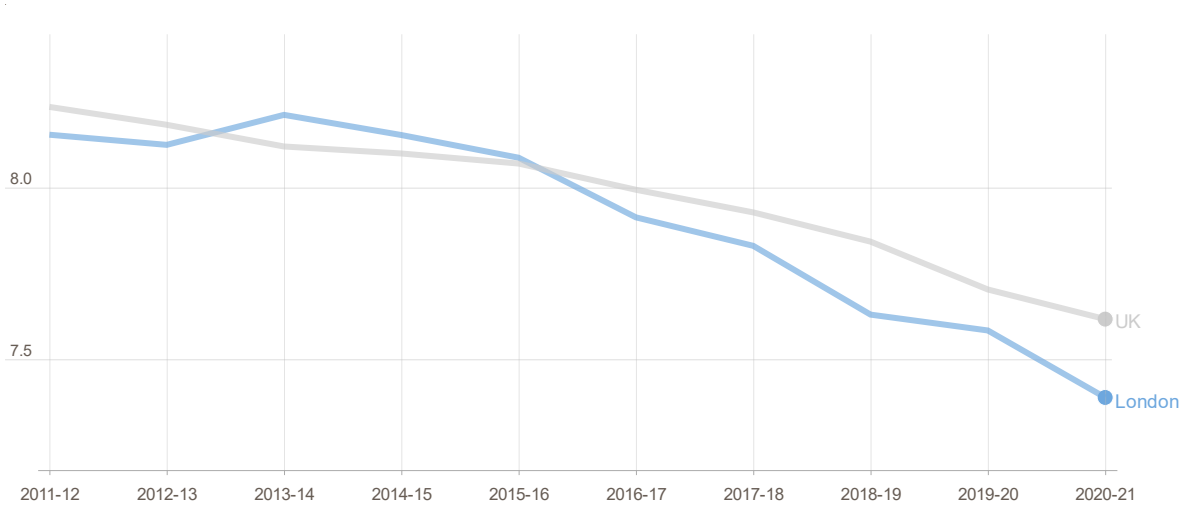


Source: Office for Health Improvement and Disparities (OHID), National Child Measurement Programme

As of 2022-23, 9.2% of London's reception children were classified as obese, similar to the percentage for England (9.3%). This represents a noticeable drop from the 2020-21 rate (15%). Compared to Reception, the prevalence of obesity in Year 6 children was higher in both London (24.8%) and England (22.7%) in 2022-23.

Figure 4: Children's happiness with life

Children's mean happiness score for life as a whole (2011-12 to 2020-21)

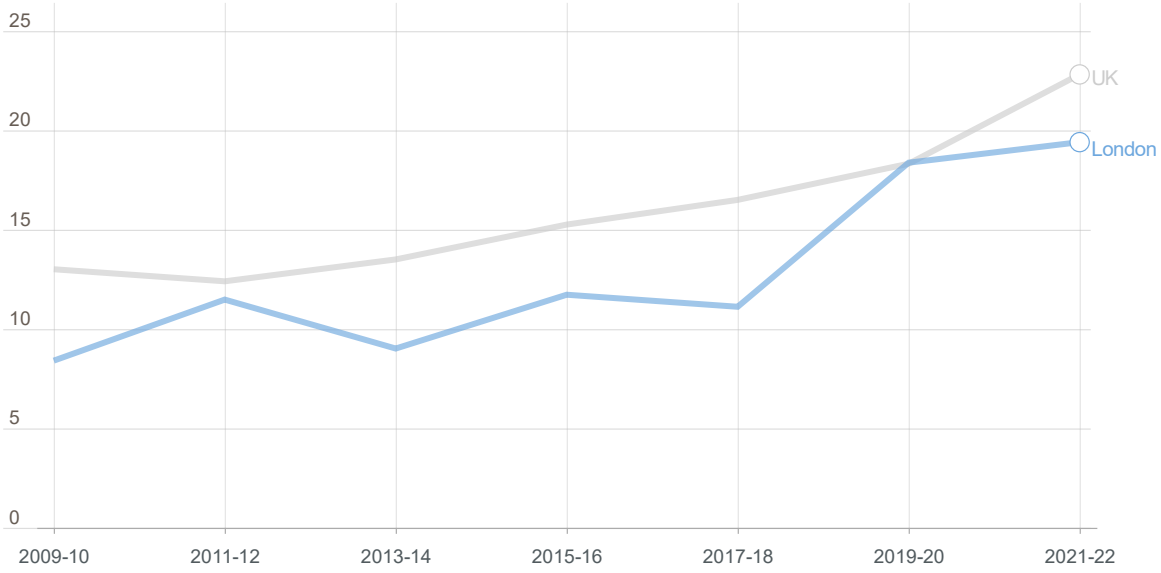


Source: Understanding Society Survey

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 5: Children with a probable mental disorder

Proportion of children aged 10-15 in the UK and London with high or very high total difficulties score (18 or more)[76], 2009-22



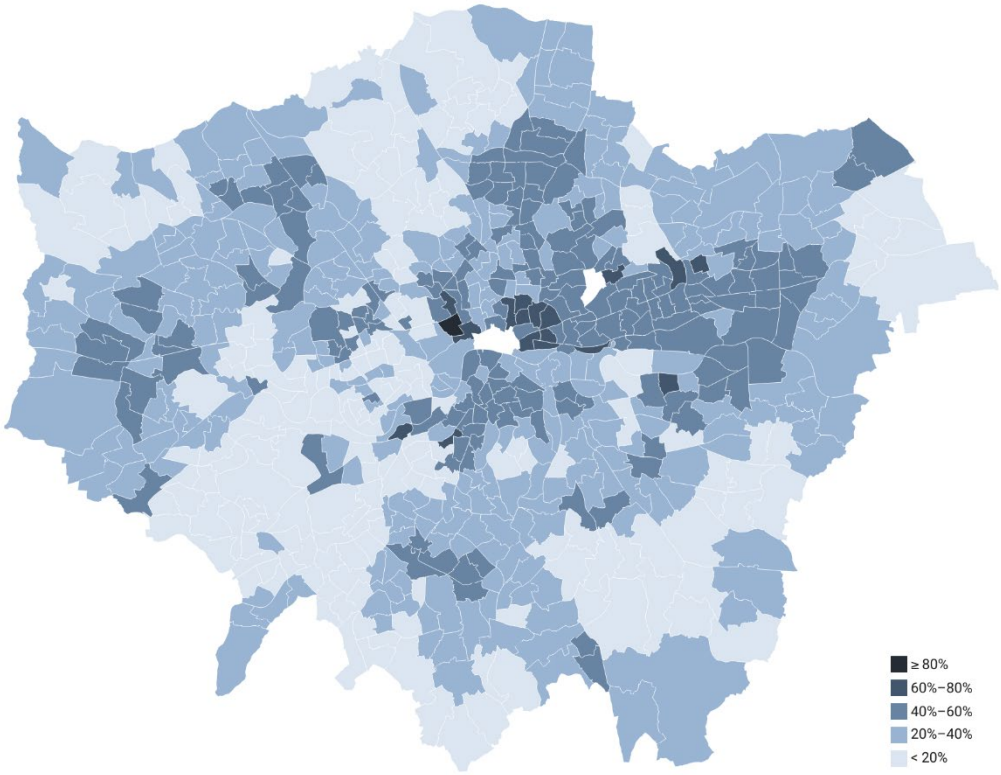
Source: Understanding Society Survey

In 2009-10, 8% of Londoners aged 10-15 had a probable mental disorder, compared to 13% across the UK. The London level has remained below the UK's over the last decade, and in the most recent survey covering 2021-22 (i.e., partially covering the pandemic period), the proportions for London and the UK were 19% and 23%, respectively.

[76] This data is from the strengths and difficulties questionnaire (SDQ) which is an emotional and behavioural screening questionnaire for children and young people. The total difficulties score is the sum of the emotional symptoms, conduct problems, hyperactivity/inattention and peer relationship problems subscales, and ranges from 0-40.

Figure 6: Children under-16 living in low-income families

Percentage of all children aged 0-15 living in low-income families across London wards (2022-2023)



Source: Children in low-income families dataset, DWP

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 32% of London's children (about 700,000) were in poverty from 2020-21 to 2022/23. Very low response rates for 2021-22 mean that estimates should be treated with caution[77].

[77] Children in relative poverty after housing costs, HBAI Poverty in London. Since the pandemic affected data collection for the Family Resources Survey, there is no regional data for 2020/21, so data that includes that year are averages of the two remaining years. Hence, there is increased uncertainty in these estimates.

Education

Table 1: Population of young people in London by education stage

London population mapped onto education stage 2022-2023.[78]

Education stage	Single year ages included	Female population (% of London)	Male population (% of London)	Total population (% of London)
Early Years	3,4	101,100 (1.1%)	105,700 (1.2%)	206,900 (2.3%)
KS1	5,6	103,600 (1.2%)	107,400 (1.2%)	211,000 (2.4%)
KS2	7,8,9,10	206,300 (2.3%)	214,700 (2.4%)	421,100 (4.7%)
KS3	11,12,13	158,000 (1.8%)	164,900 (1.9%)	322,900 (3.6%)
KS4	14,15	103,700 (1.2%)	108,600 (1.2%)	212,300 (2.4%)
KS5	16,17	99,600 (1.1%)	104,600 (1.2%)	204,200 (2.3%)

Source: ONS, mid-year 2022 population data

Note: Percentages calculated as proportion of total London population, not gender specific population. Percentages may not add up due to rounding.

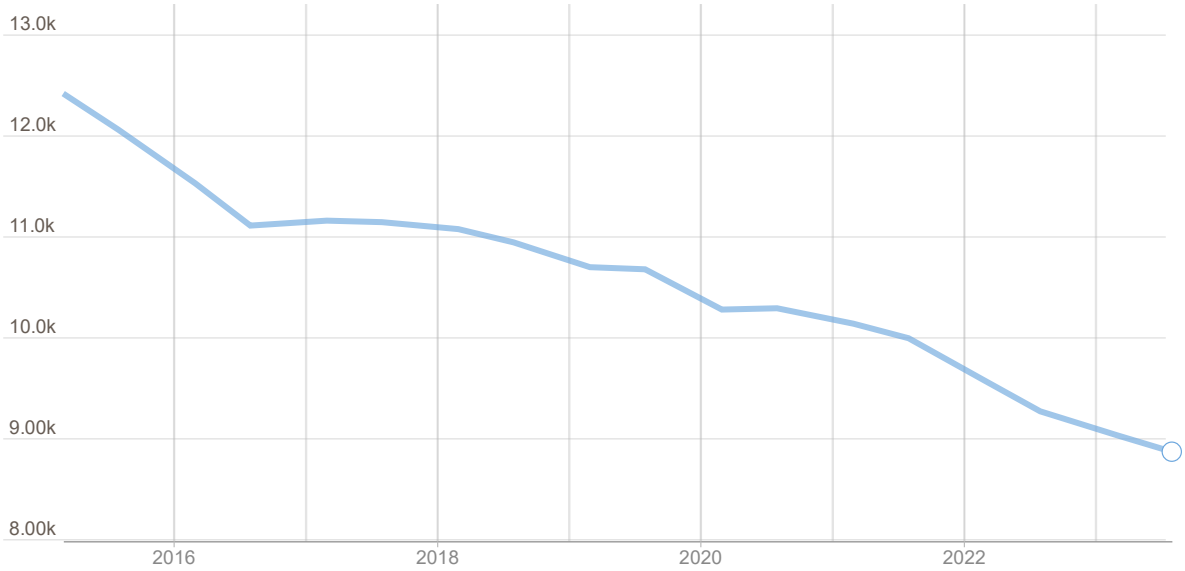
Looking at the population breakdown for young Londoners by education stage, the total population cohort equivalent to those in Early Years, KS1 and KS2 education (primary school) declined by just over 0.8 percentage points (pp) between 2017 and 2022. Meanwhile, the total population cohort equivalent to those in KS3, KS4 and KS5 (secondary school) experienced an increase of nearly 0.8pp over that same period.

[78] Values are approximate. Official definitions of the key stages are defined with non-unique boundaries (3-5, 5-7, 7-11, 11-14, 14-16, and 16-18). For our categorisation we use the lower limits of these categories, so that children are included in the Key Stage they were expected to enter at the start of the school year in September 2022.

Early Years

Figure 7: Registered early years providers[79]

Number of registered early years providers across London in March and August (2015 to 2023)



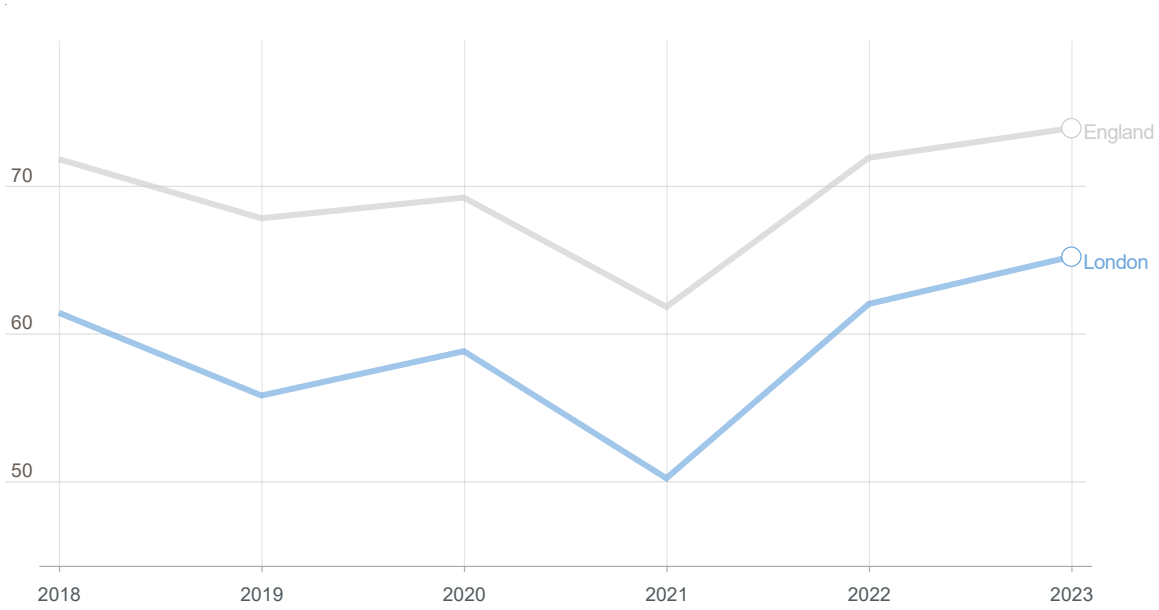
Source: Ofsted

Between August 2015 and August 2023, there was a 26% decrease in number of registered early years providers across London (from 12,057 to 8,867), compared to a 32% decrease across England (from 71,310 to 48,143). Although the total number of providers in London decreased, the total number of spaces they provided increased by 12% during the same period. This is due to a shift to larger childcare providers on domestic premises, while the number of smaller providers (childminders) decreased by 43%, driving the reduction in number of providers.

[79] 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.

Figure 8: Free Early Education Entitlement (FEEE) take-up

Percentage of eligible two-year-old children using at least part of their FEEE (2018 to 2023)



Source: Department for Education (DfE)

A two-year-old in England is entitled to 15 hours a week free childcare (for 38 weeks) if their parent/guardian receives a range of benefits and/or has other characteristics, such as being looked after by the local authority or getting disability living allowance. In 2023, 68% of eligible two-year-olds in London used at least part of their FEEE, which is lower than the national average (74%).

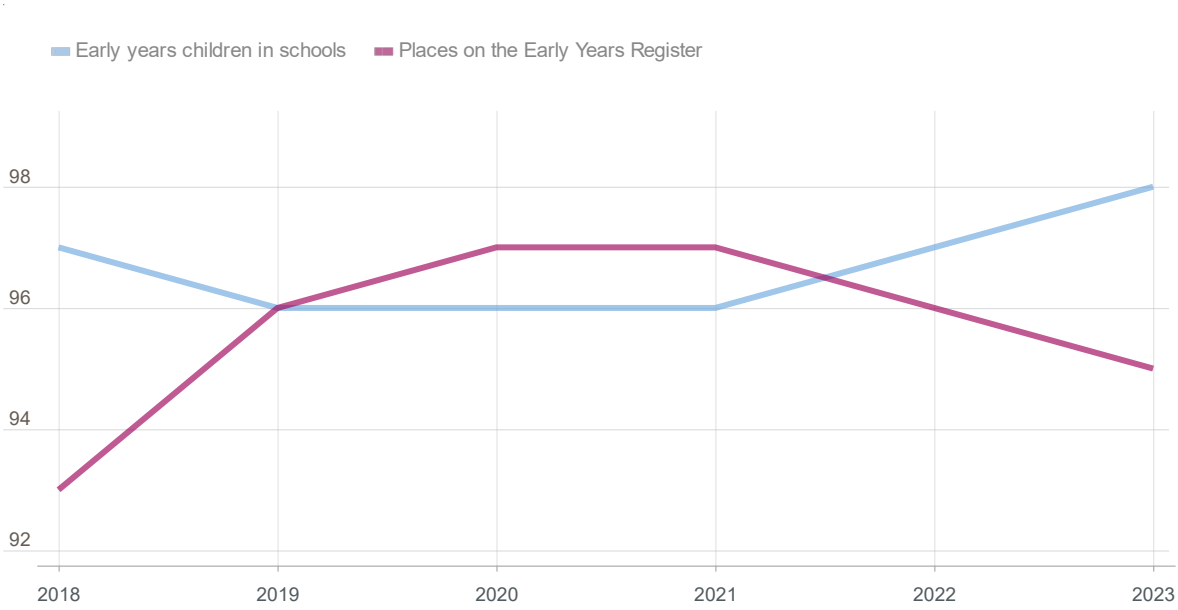
During 2020 and 2021, there was a 9pp decrease in the number of eligible two-year-olds using their FEEE, followed by an uptick between 2021 and 2022 and a smaller rise between 2022 and 2023.

The childcare sector is currently undergoing significant change due to the government's expansion of existing entitlement for eligible working parents. Before April 2024, only working parents of children aged three or four were entitled to 30 hours of free childcare. Under the planned expansion[80], all working families with a child from 9 months old up to school age will be entitled to this by September 2025.

[80] See Childcare Choices for details of phases.

Figure 9: Children and places in 'good' or 'outstanding' settings in London

Percentage of children and places in 'good' or 'outstanding' settings in London (2018-2023)

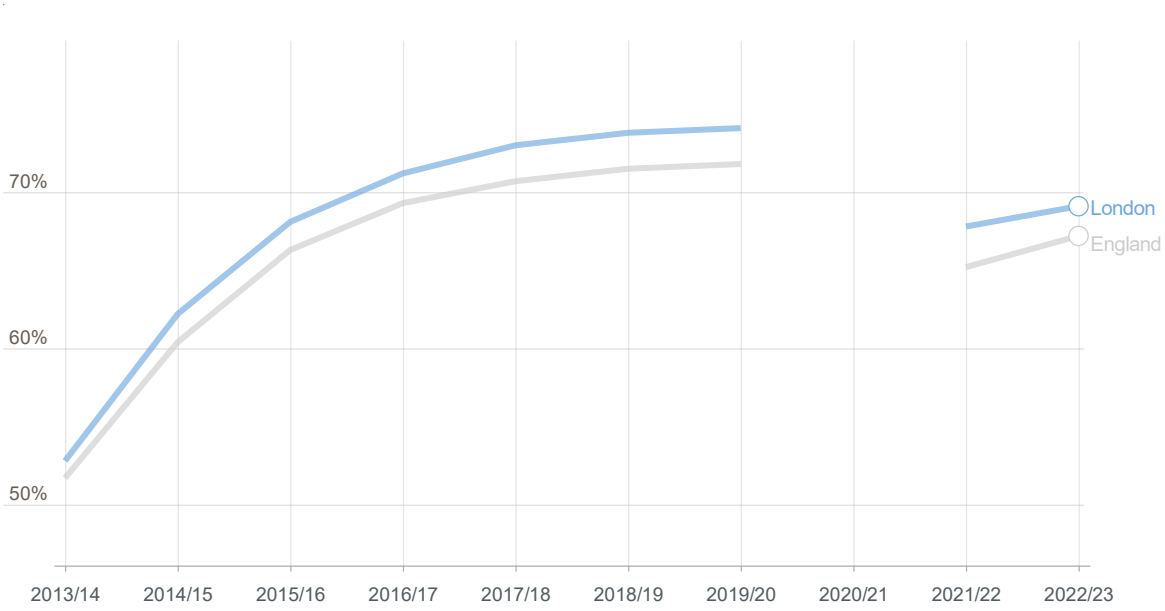


Source: DfE, Ofsted state-funded schools statistics and Ofsted early years and childcare statistics

2023 data shows that 98% of early years children in schools attend a setting that is 'good' or 'outstanding'. 95% of places on the Early Years Register are in 'good' or 'outstanding' settings – a 2pp increase since 2018. This is similar to the proportion in England (96%).

Figure 10: Good Level of Development (GLD) at age five

Percentage of children with a good level of development at age five (2013-2022)



Source: DfE

Note: No data available for 2020/21

The percentage of children in London with a GLD[81] at age five increased from 53% in 2013-14 to 69% in 2022-23. This compares to an increase from 52% to 67% in England over the same period. Meanwhile, children eligible for free school meals (FSM) were less likely to have a GLD at age five (58%) than those ineligible (73%). Levels of development increased for all children irrespective of FSM eligibility.

A greater proportion of girls had a GLD (76%) than boys (63%), while a higher percentage of White children had a GLD (72%) than Black children (63%). For minority ethnic groups, the biggest gap was between Chinese children (79%) and children who were Travellers of Irish heritage (41%).

Table 2: Percentage of black and Chinese children in London with a GLD at age five by year

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2021/22	2022/23
Black children	53%	61%	67%	70%	71%	72%	70%	62%	63%
Chinese children	54%	65%	73%	76%	80%	84%	82%	80%	79%
Difference (percentage points)	**1pp**	**4pp**	**6pp**	**6pp**	**9pp**	**12pp**	**1pp**	**18pp**	**16pp**

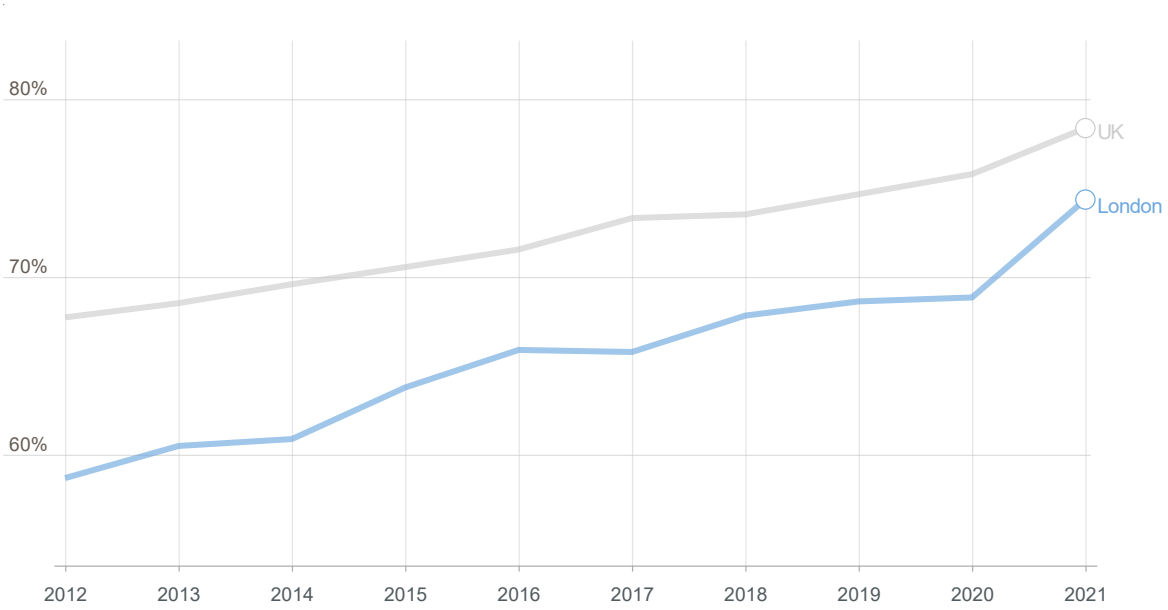
Black children are less likely to have a GLD at age 5 compared to other ethnic groups. The attainment gap between Chinese (who have the highest achievement) and black children increased by 15pp since 2013[82]. Students from Irish traveller (41%) and Gypsy/Roma (45%) backgrounds had substantially lower levels of GLD attainment.

[81] Children are defined as having reached a GLD if they achieve the expected level for the Early Learning Goals in learning (communication and language; personal, social and emotional development; and physical development), mathematics and literacy.

[82] The change in 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 were the lowest achieving ethnic group across all years.

Figure 11: Mothers with dependent children in London who are in paid work

Percentage of mothers with dependent children in London in paid work (2012-2021)



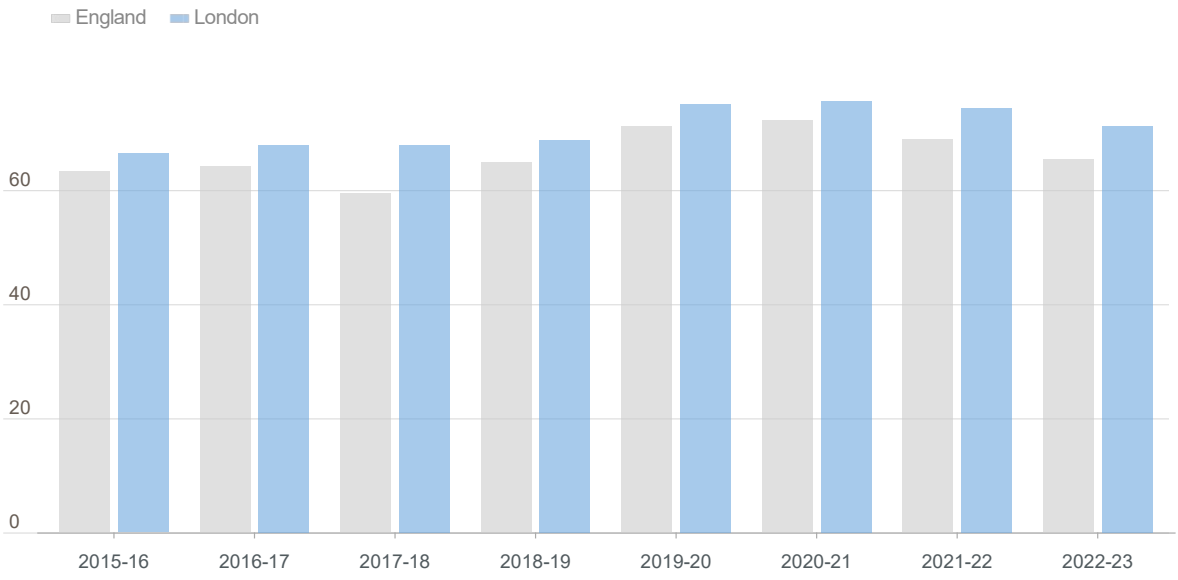
Source: ONS

As of 2021, 74% of mothers with dependent children in London were in paid work, compared to 78% across England. In London, this increased by 16pp between 2012 and 2021.

Key Stage 4

Figure 12: Standard 9-4 pass in English and Mathematics GCSEs

Percentage of pupils who achieved a standard 9-4 pass in English and Mathematics GCSEs (2015-16 to 2022-23)



Source: DfE

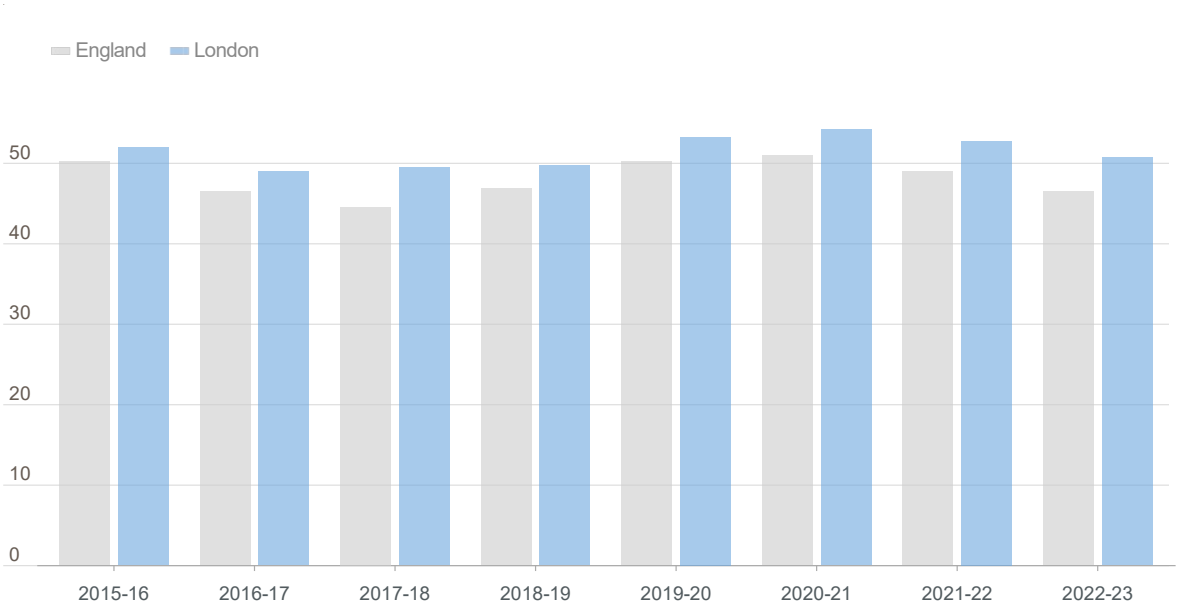
In 2022-23, London had a higher percentage of pupils achieving a standard 9-4 pass[83] in English and Mathematics (71%) than England (65%).

80% of London's Asian pupils achieved a standard pass in 2022-23, compared to 66% of Black pupils, 68% of Mixed pupils, 70% of White pupils and 70% of Other pupils.

Meanwhile, only 16% of London pupils with a Special Educational Needs (SEN) statement or Educational Health and Care (EHC) plan[84] achieved a standard pass in 2022-23, compared to 78% for pupils with no SEN.

Figure 13: Average Attainment 8 score

Average Attainment 8 score per pupil in London and England (2015-16 to 2022-23)



Source: DfE

The average Attainment 8 score[85] for London's pupils decreased by 1.3pp from 2015-16 to 2022-23 (to 50.3). For England, it fell by 3.7pp over the same period (to 46.4).

In 2022-23, London's Black pupils had the lowest average Attainment 8 score (46.5), compared to 56.6 for Asians (the highest score). The gap between FSM-eligible and non-FSM-eligible pupils increased from 8.8 points in 2015-16 to 12.1 points in 2022-23.

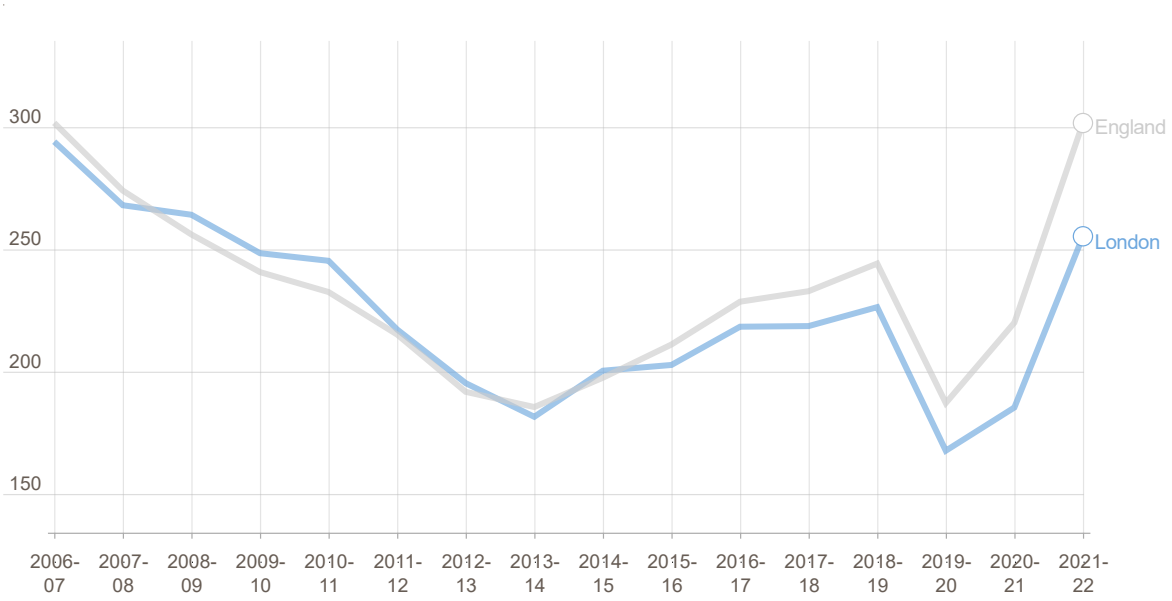
[83] The highest grade that can be achieved is 9 (equivalent to an A* under the old grading system) and a 4 is a standard pass (equivalent to a grade C under the old system).
[84] An EHC plan is a legal document that sets out a child or young person's educational, health and social care needs. It describes a child's special educational needs and disabilities. The Children and Families Act (2014) introduced EHC plans to replace statements of SEN. This change did not apply to children and young people who already had a statement of SEN.
[85] Attainment 8 measures pupils' performance in 8 GCSE-level qualification (out of 90).

For the same school year, pupils with no identified SEN had an average Attainment 8 score of 54.5, compared to 16.4 for pupils with SEN and a statement or EHC plan. This compares to 50.2 and 14.0, respectively, in England.

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 14: Suspension rate across all schools

The rate of pupils with at least one suspension[86] per 10,000 for pupils in London and England (2006-7 to 2021-22)



Source: DfE

The suspension rate in London for pupils experiencing at least one such incident in the academic year increased from 185 in 2020-21 to 255 per 10,000 pupils in 2021-22. This compares to an increase from 220 to 302 for England.

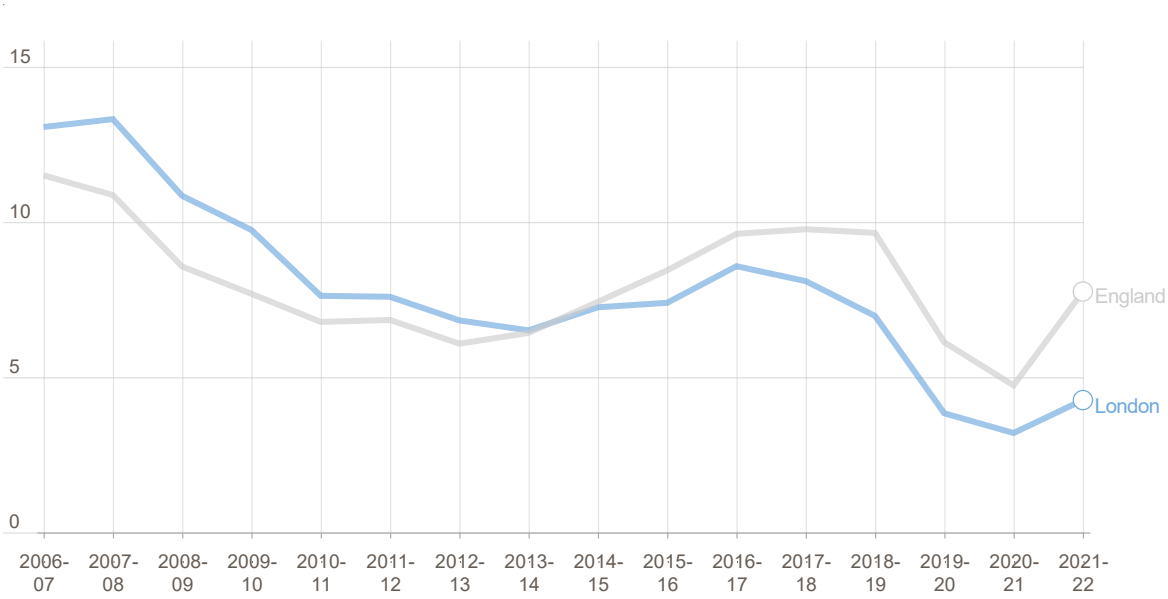
In London, the rate is substantially higher among males (332) than females (175). Black students continued to experience a higher suspension rate (at 423) than other groups; this compares to 121 for Asian students, 234 for White students and 315 for Mixed students.

FSM-eligible pupils had a higher suspension rate (460) than non-eligible pupils (188), and SEN pupils with statement or EHC plan had a higher rate (551) than those without a statement of SEN or EHC plan (199).

[86] Previously referred to as fixed-term exclusions.

Figure 15: Permanent exclusion rate (PER)

Permanent exclusion rate per 10,000 pupils across all schools in London and England (2011-12 to 2021-22)



Source: DfE

Between 2016-17 and 2021-22, the PER in London decreased from 8.6 to 4.3 per 10,000 pupils. Over the same period, England's PER decreased by a lesser extent (from 9.6 to 7.8).

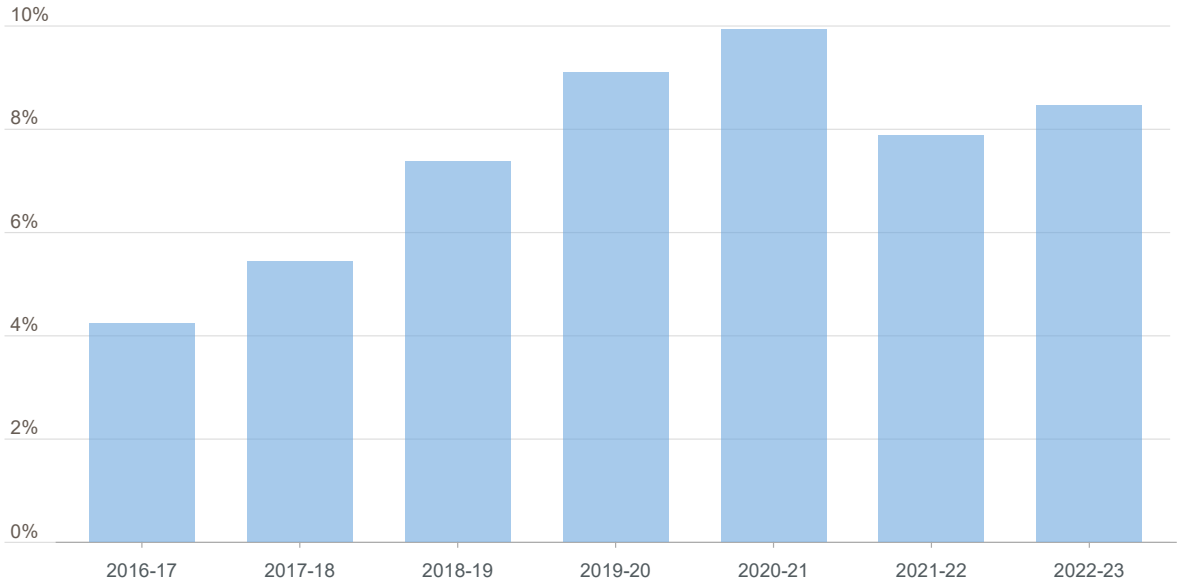
In 2021-22, FSM-eligible pupils experienced a higher PER (9.4) than non-eligible pupils (2.6).

Black pupils experienced the highest rate in 2021-22 (6.8), compared to 1.9 for Asian students, 6.8 for Mixed students and 3.8 for White students. Meanwhile, pupils with a SEN statement or EHC had a higher PER (4.3) than those without a statement of SEN or EHC plan (3.1).

Special Educational Needs and Disabilities

Figure 16: Annual change in number of pupils with an EHC plan or statement of SEN

Annual change in number of pupils with statement of SEN or EHC in London (2016-17 to 2022-23)



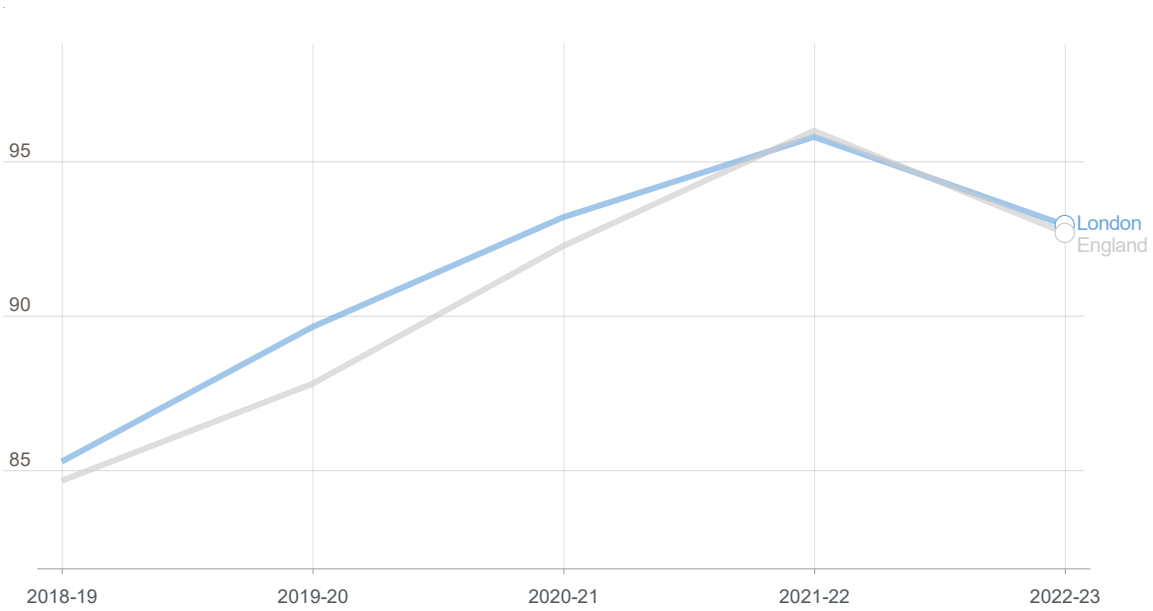
Source: DfE

The number of pupils in London with an EHC plan or statement of SEN increased by 8.5% between 2021-22 and 2022-23. Meanwhile, the population of all pupils (irrespective of SEN status) increased by only 0.2%.

Post Key Stage 4

Figure 17: Achievement of at least 2 substantial level-3 qualifications

Percentage of students achieving at least two substantial level-3 qualifications in London and England (2018-19 to 2022-23)[87]



Source: DfE

92.9% of pupils across London achieved at least two substantial level-3 qualifications in 2022-23, broadly in line with the England average (92.7%). This represents a decrease from 2021-22 levels for both London (95.8%) and England (96.0%).

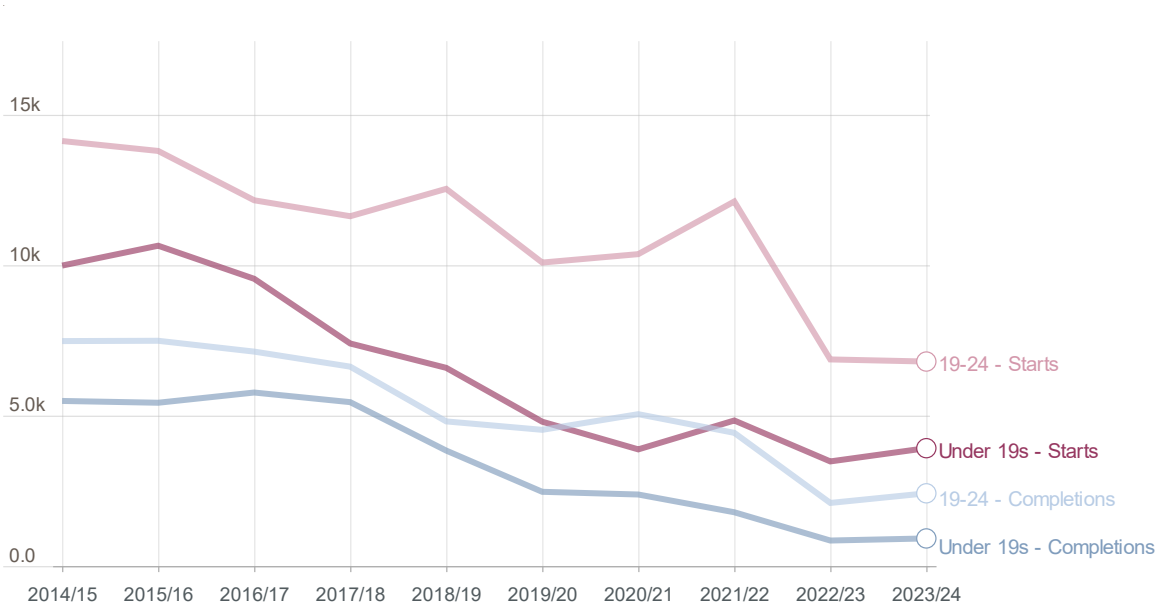
Compared to 2018-19, the number of pupils attaining at least two substantial level-3 qualifications increased by 7.7pp in London and by 8.0pp in England over the same period.

In 2022-23, 80.7% of pupils with an EHC plan or statement of SEN attained this (versus 73.8% in 2018-19). This compares to 94.1% for pupils without a statement of SEN or EHC plan.

[87] Includes all state-funded schools and colleges.

Figure 18: Apprenticeship programme starts and completions

Number of apprenticeship programme starts and completions in London for under-19s and 19–24-year-olds (2014-15 to 2023-24)[88]



Source: DfE

In 2023-24, the number of Londoners aged under-19 starting an apprenticeship programme was 3,920, a 13% increase from the previous year. Between 2014-15 and 2022-23, this number decreased by 61%. For Londoners aged 19-24, 6,800 started an apprenticeship programme in 2022-23, very similar to the previous year. Between 2014-15 and 2022-23, this number decreased by 52%.

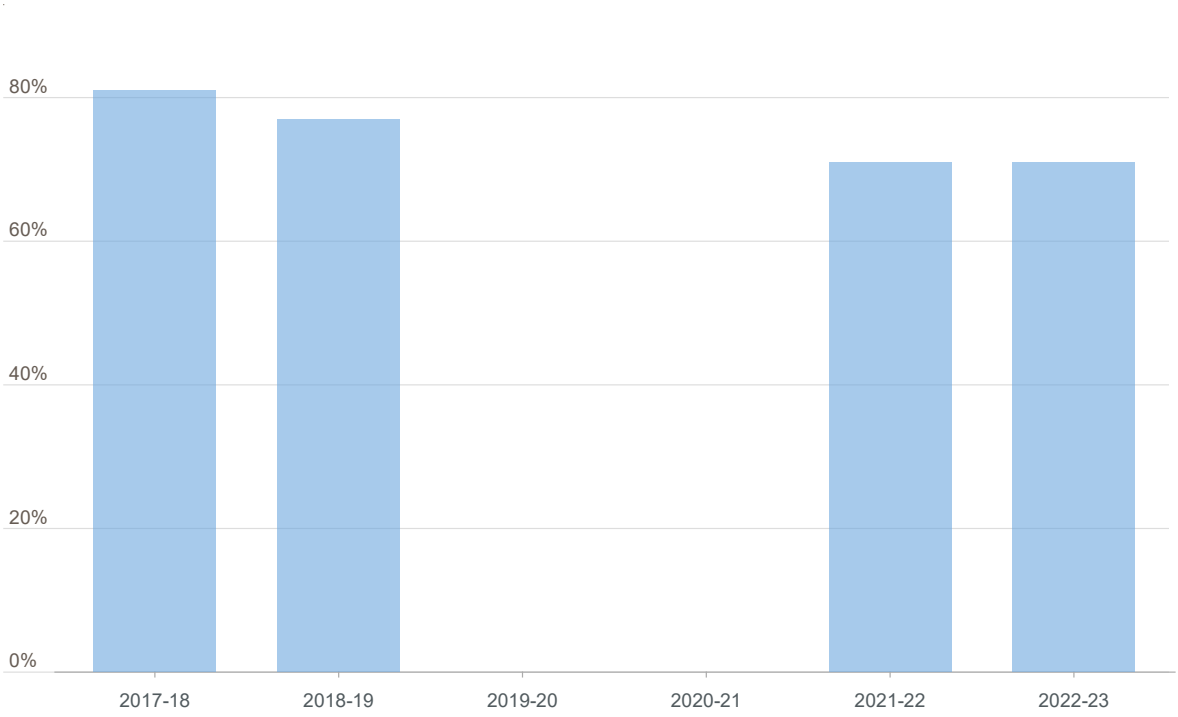
The decline in apprenticeship starts for under-25s in London is commonly attributed to the introduction of the Apprenticeship Levy and wider reforms to improve training quality in 2017. These reforms have shifted apprenticeships to older learners doing higher-level apprenticeships (level four or above)[89].

[88] 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.
[89] Recent apprenticeships trends in London – London Datastore

Safety

Figure 19: Perception of safety of the 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 (2017-18 to 2022-23)[90]



Source: Public Attitudes Survey, MOPAC

In 2022-23, 71% of Londoners agreed that their local area was a safe place for children and young people to grow up, compared to 81% in 2017-18. Males were more likely to agree (72%) than females (66%).

Londoners aged 65+ were most likely to agree, while those aged 35-44 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.

[90] The PAS was moved from a face-to-face to a telephone methodology in March 2020 as a result of the pandemic. There was a 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[91]. These differences in health status are typically presented over four factors: socio-economic (e.g., education and income), geographic (e.g., urban vs rural, area deprivation), protected characteristics (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 pre-existing 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 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.

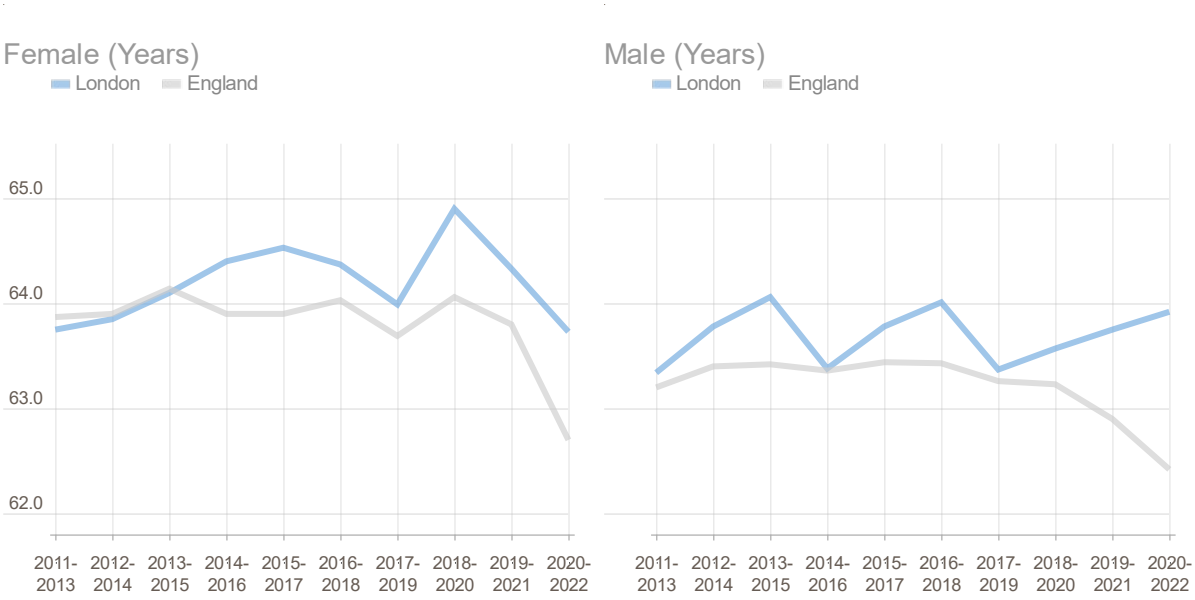
This chapter contains material which is covered in greater depth in the Office for Health Improvement & Disparities (OHID) Health Profile for London Report and the Snapshot of Health Inequalities in London Report.

[91] What are health inequalities? | The King's Fund (kingsfund.org.uk) https://www.kingsfund.org.uk/insight-and-analysis/long-reads/what-are-health-inequalities

Life Expectancy, Mortality and Inequalities

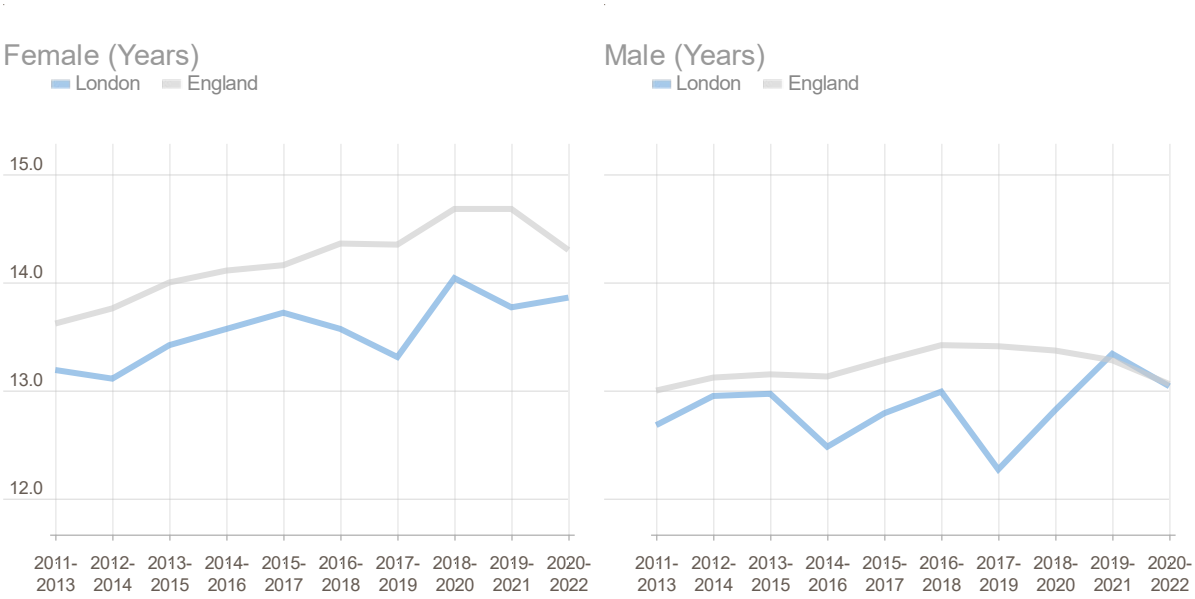
Healthy life expectancy (HLE, an estimate of lifetime spent in “Very good” or “Good” health based on how individuals perceive it) is a key summary measure of population health.

Figure 1: Healthy life expectancy at birth in London and England, by sex
2011-13 to 2020–22



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 2020–22



Source: *Office for National Statistics (ONS)*

At birth, London HLE values remain higher than the national average for both males and females, as shown in Figure 1. Interestingly we see that male HLE at birth increased in London from 63.37 years in 2017-2019 to 63.92 in 2020-2022, whilst at the England level it decreased from 63.26 years to 62.42 years over the same time periods. Further analysis from the ONS will need to be conducted to understand the reasons behind the different trend for male HLE in England. 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 (as of 2018-20), and from 57.8 years in Tower Hamlets to 70.1 years in Wandsworth for females.

The London advantage at birth is reversed for males and females at age 60-64. The latest data shows male HLE at birth is 63.92 in London (62.42 in England) and female HLE is 63.73 in London (62.7 in England). Whereas at 60-64, for males it is 13.04 in London (13.06 in England), and for females it is 13.86 in London (14.3 in England)[92].

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

[92] Mortality and migration in Britain, first results from the British Household Panel Survey - ScienceDirect

deprived (614 compared to 187), while in 2019 the ratio between the two mortality rates was lower, at 2.9 (463 compared to 157).

Table 1: Top ten causes of adult mortality in London, male

Number of deaths in people aged over 20 years, 2022

Leading causes of death	Total (raw count)
1 Ischaemic heart disease	3,678
2 Dementia and Alzheimer disease	2,003
3 COVID-19	1,337
4 Malignant neoplasm of trachea, bronchus and lung	1,329
5 Chronic lower respiratory diseases	1,290
6 Cerebrovascular diseases	1,191
7 Malignant neoplasm of prostate	949
8 Influenza and pneumonia	854
9 Malignant neoplasm of colon, sigmoid, rectum and anus	713
10 Malignant neoplasms, stated or presumed to be primary of lymphoid, haematopoietic and related tissue	651

Table 2: Top ten causes of adult mortality in London, female

Number of deaths in people aged over 20 years, 2022

Leading causes of death	Total (raw count)
1 Dementia and Alzheimer disease	3,567
2 Ischaemic heart disease	1,843
3 Cerebrovascular disease	1,442
4 Chronic lower respiratory disease	1,241
5 Malignant neoplasm of trachea, bronchus and lung	1,111
6 COVID-19	1,070
7 Malignant neoplasm of breast	1,051
8 Influenza and pneumonia	932
9 Symptoms, signs and ill-defined conditions	709
10 Malignant neoplasm of colon, sigmoid, rectum and anus	705

Source: Office for National Statistics (via Nomis)

Tables 1 and 2 show the top ten causes of adult mortality by count and sex, for adults aged 20 and over. London was profoundly impacted by the pandemic, and in 2021 the main cause of adult death in both males and females was COVID-19.

However, in 2022, the picture looks very different. Table 1 shows the leading cause of death for males was ischaemic heart disease (IHD) (3,678 deaths recorded), followed by dementia and Alzheimer disease (2,003). Table 2 shows that for females the leading cause of death was dementia and Alzheimer disease (3,567 deaths recorded) followed by IHD (1,843). COVID-19 ranked as the third leading cause of death for males and the sixth leading cause for females.

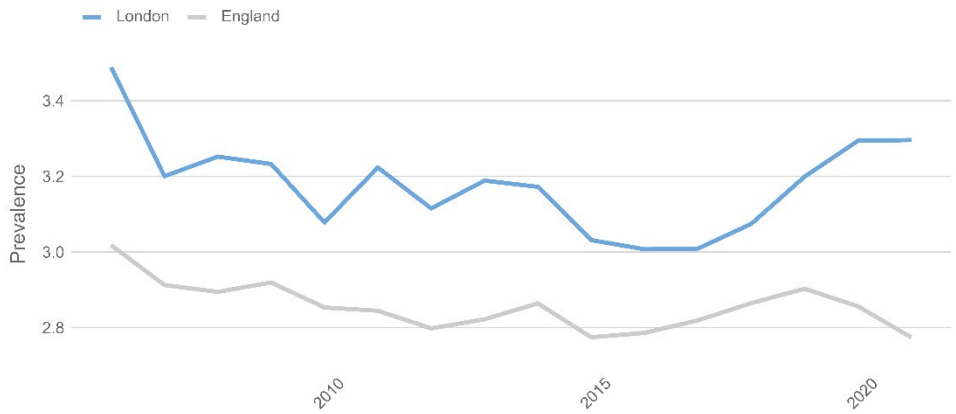
This suggests that as relative mortality from COVID-19 decreases, chronic disease and conditions associated with older age contribute more to overall mortality in London. Except for 2020 and 2021, since 2001, IHD has consistently been the leading cause of death for males in London and in England. With that in mind, COVID-19 could have been labelled the main cause of death 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 2022.

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 4. The LBW rate has been gradually increasing in London since 2017. Given the strong positive correlation between risk of LBW and poverty[93], the increasing rate in London could be related to the cost-of-living crisis and increased levels of socioeconomic deprivation.

Figure 4: Prevalence of Low Birth Weight in London

Percentage of all live births with gestational age of 37+ weeks, with a birth weight of <2.5 kg, 2006-2021



Source: Public health profiles - OHID (phe.org.uk)

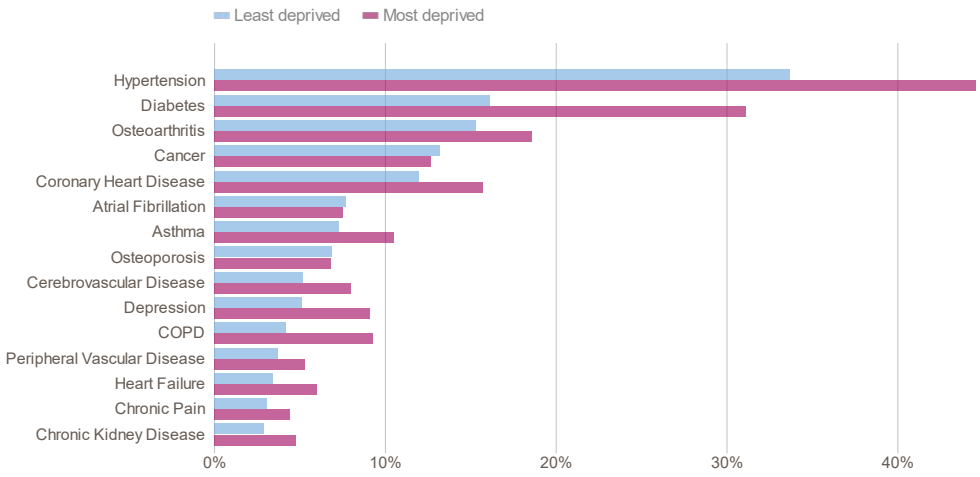
Another useful measure of poor health is “Years lived with disability” (YLD), which combines the prevalence of each condition with a rating of the severity of symptoms. By this measure, according to the Global Burden of Disease Study, the leading

[93] https://bmjopen.bmj.com/content/bmjopen/11/3/e042753.full.pdf

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 they 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 5: Prevalence of common diseases in older adults in London, by most and least deprived quintiles

Prevalence of disease in people aged 65 – 84 years, June 2021

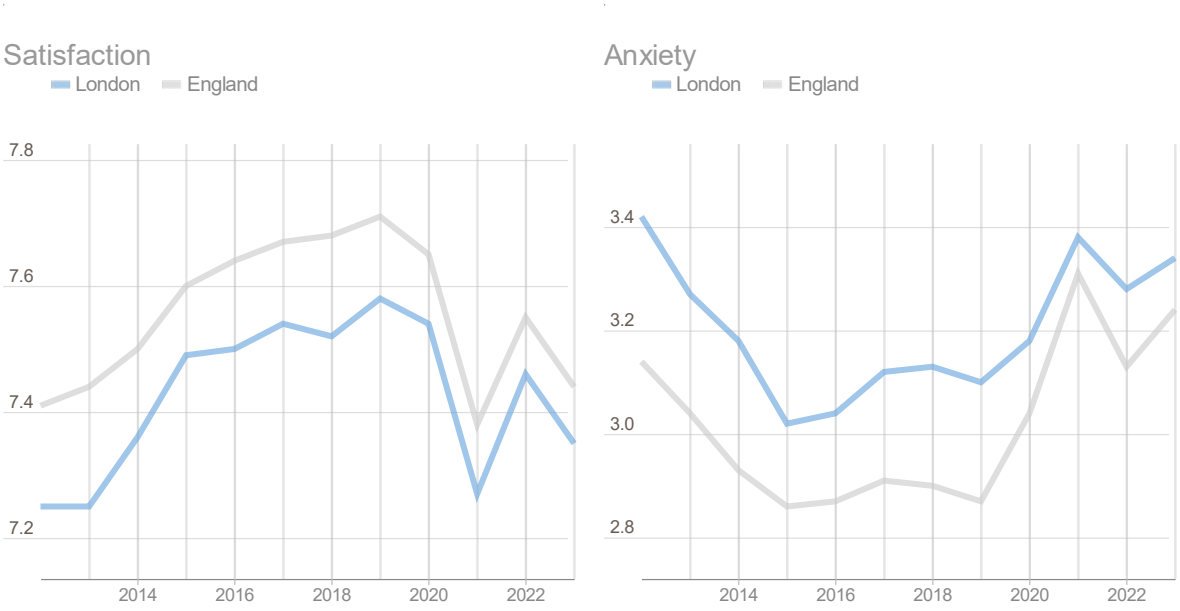


Source: NHS Segmentation Model

There is wide variation in rates of common diseases in London according to level of deprivation. Figure 5 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 (high blood pressure) 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 6: Anxiety and life satisfaction for adults in London

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?”, 2011-12 to 2022-23



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

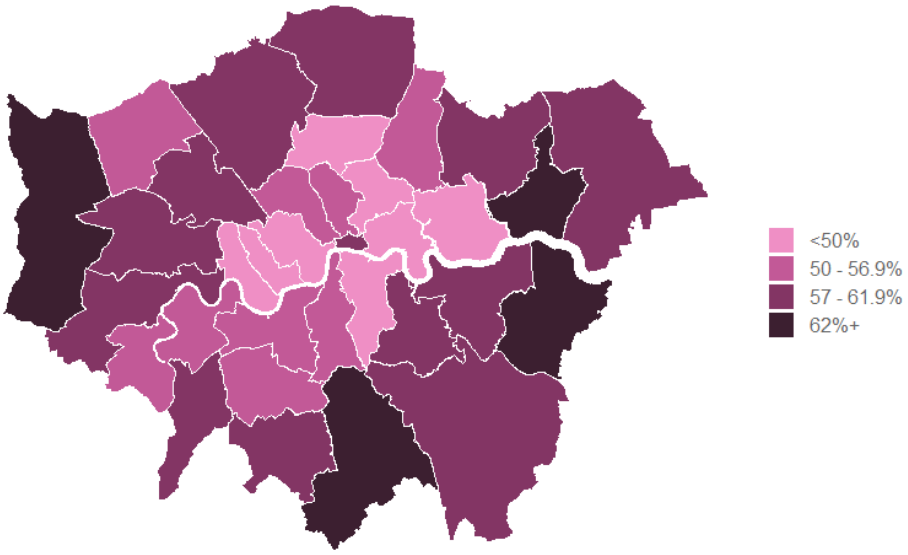
Figure 6 shows that indices of wellbeing continue to have lower values in London than the national average. The figure also shows how after steep improvements in values at the start of this decade, anxiety levels continue to rise since the pandemic (between 2022 and 2023, anxiety rose from 3.28 to 3.34 in London and from 3.13 to 3.24 in England), while life satisfaction in London continues to drop (between 2021 and 2022, life satisfaction increased from 7.27 to 7.46 in London and from 7.38 to 7.55 in England, before falling between 2022 and 2023 from 7.46 to 7.35 in London and 7.55 to 7.44 in England). Life satisfaction values for the year ending March 2022 recovered somewhat, but have not yet reached their pre-pandemic levels.

Behavioural Risk Factors and Inequalities

The “causes of the causes” of poor health are the wider determinants (e.g., 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 enabling 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 7: Percentage of adults classified as overweight/obese by London borough

% adults (aged 18+) with body mass index greater or equal to 25 kg/m^2 , 2021/22

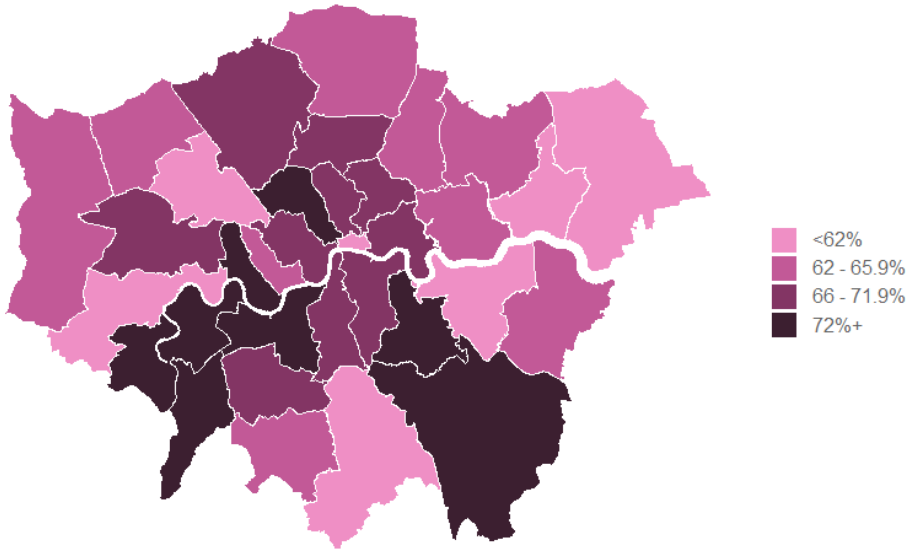


Source: OHID Public Health Outcomes Framework (based on Active Lives Adult Survey, Sport England)

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 7 shows that the highest rates are concentrated in Outer London boroughs, with Barking and Dagenham having the highest percentage (70%) and Southwark the lowest (44%).

Figure 8: Percentage of physically active adults by London borough

% adults (aged 19+ years) doing 150+ minutes/week moderate intensity activity in bouts of 10+ minutes in previous 28 days, 2021/22

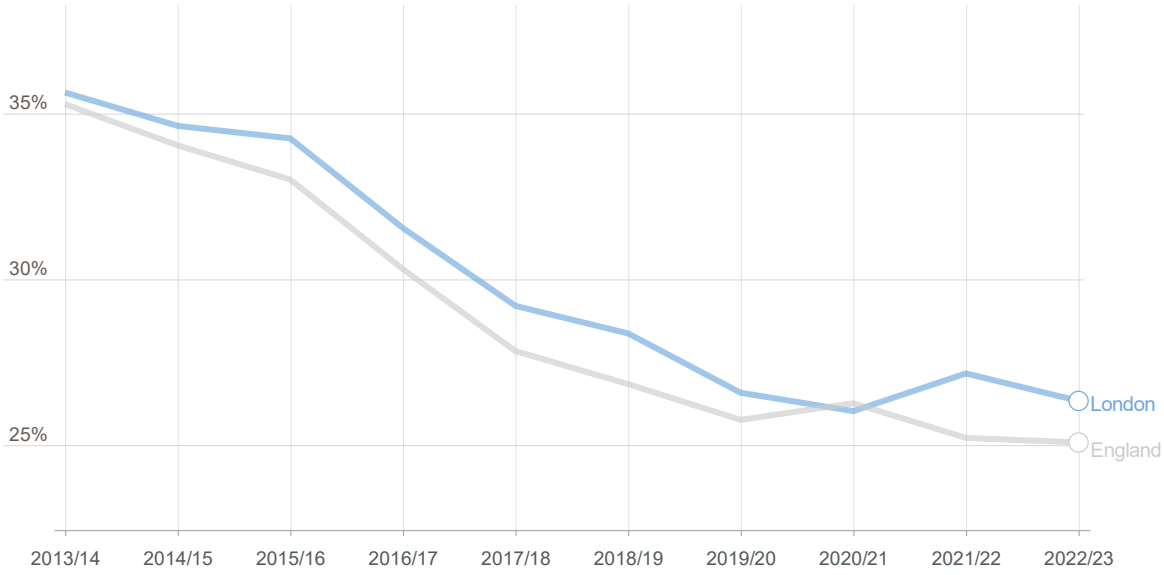


Source: OHID Public Health Outcomes Framework (based on the Active Lives Adult Survey, Sport England)

Figure 8 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 9: Smoking prevalence in adults in London with a long-term mental health condition

Prevalence of current smoking among persons with long-term mental health condition aged 18+, 2022/23



Source: GP Patient Survey via OHID Public Health profiles

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 in routine and manual occupations, and for those living with mental illness. Figure 9 shows that the prevalence of smoking among adults with a long-term mental health condition is higher in London than in England. In 2019/20, this pattern reversed, with a lower prevalence in London than England until 2020/21. By 2021/22, this trend reversed again.

Smoking prevalence in adults in routine and manual occupations (aged 18-64) remained lower in London than in England between 2011 and 2022. In 2022, this stood at 20.2% in London and 22.5% in England. Note that this data comes from the Annual Population Survey[94] (which covers respondents aged 18-64), whereas data on mental health comes from the GP Patient Survey (covering respondents aged 18+).

For alcohol consumption, the values for London in 2021/22 derived by OHID from Hospital Episode Statistics (age-standardised rate per 100,000 of population) were 910 admission episodes for alcohol-specific conditions for males and 296 for females; these expose the difference between the sexes 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. Child immunisation rates in London remain lower than the England average across seven types of vaccinations. By contrast, hypertension rates remain lower in London than the England average. Hypertension is diagnosed as blood pressure consistently above 140/90 mmHg.

However, 2022 data from the NHS Segmentation Model shows that patients aged 65-84 in the most deprived quintile in London have a higher estimated prevalence of hypertension (46.3%) than the least deprived quintile (34.8%). That said, the most deprived Londoners are least likely to have controlled hypertension.

Generally, engagement in vaccination and screening programmes declines with increasing levels of deprivation.

[94] https://fingertips.phe.org.uk/search/smoking#page/4/gid/1938133217/pat/15/par/E92000001/ati/6/are/E12000007/iid/92445/age/183/sex/4/cat/-1/ctp/-1/yrr/1/cid/4/tbm/1/page-options/ine-yo-1:2022:-1:-1_ine-ct-18_ine-pt-0

Figure 10: Childhood vaccination coverage (%), London, selected vaccinations

2011/12 to 2022/23

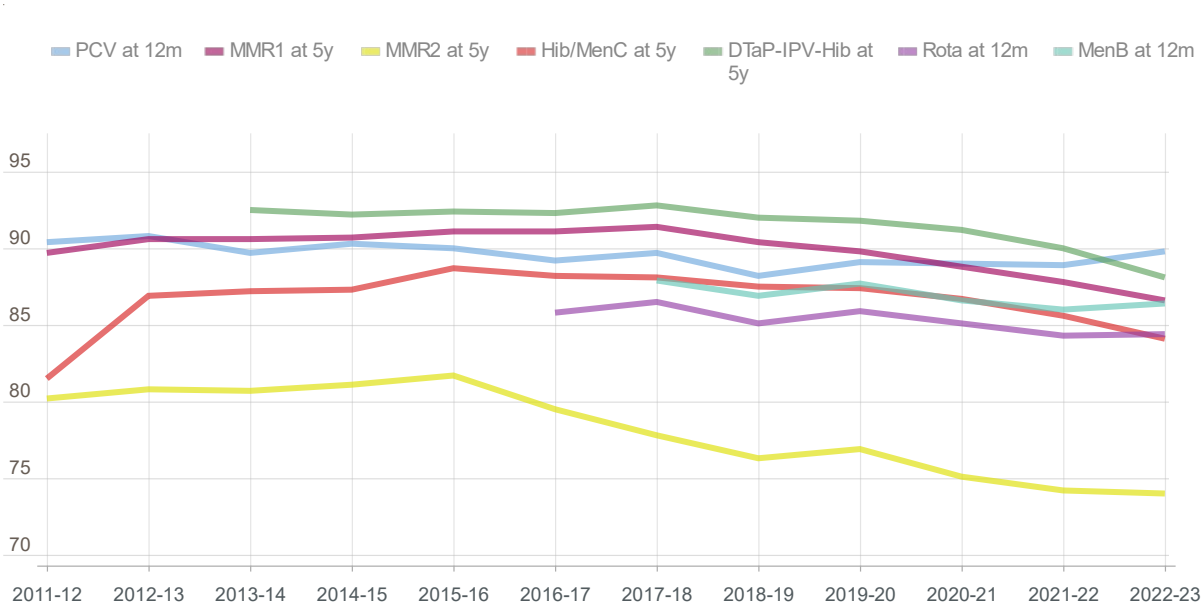
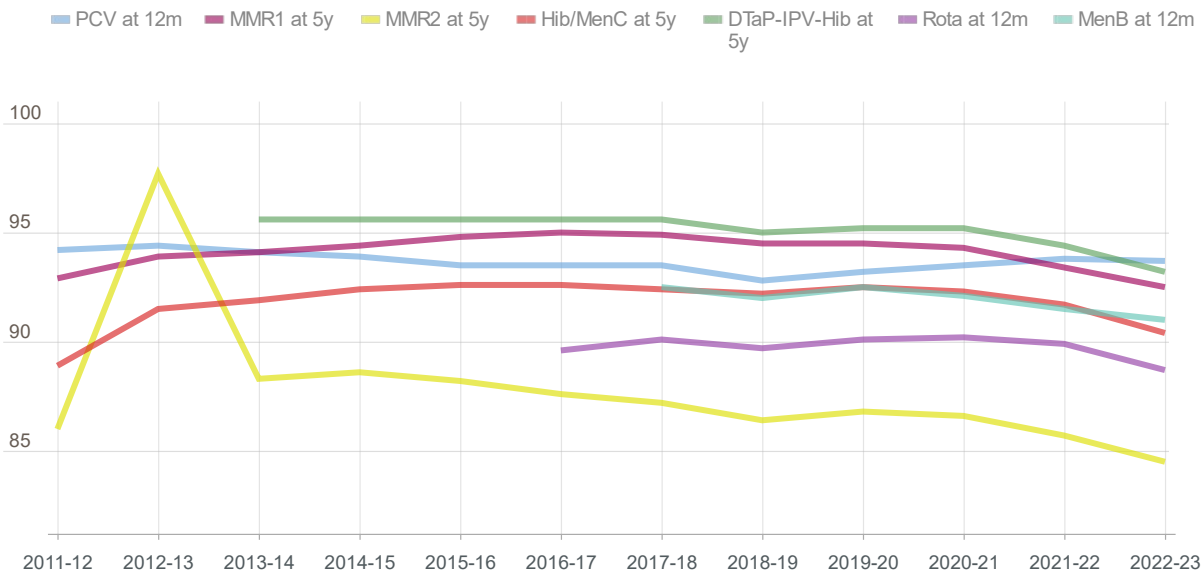


Figure 11: Childhood vaccination coverage (%), England, selected vaccinations

2011/12 to 2022/23



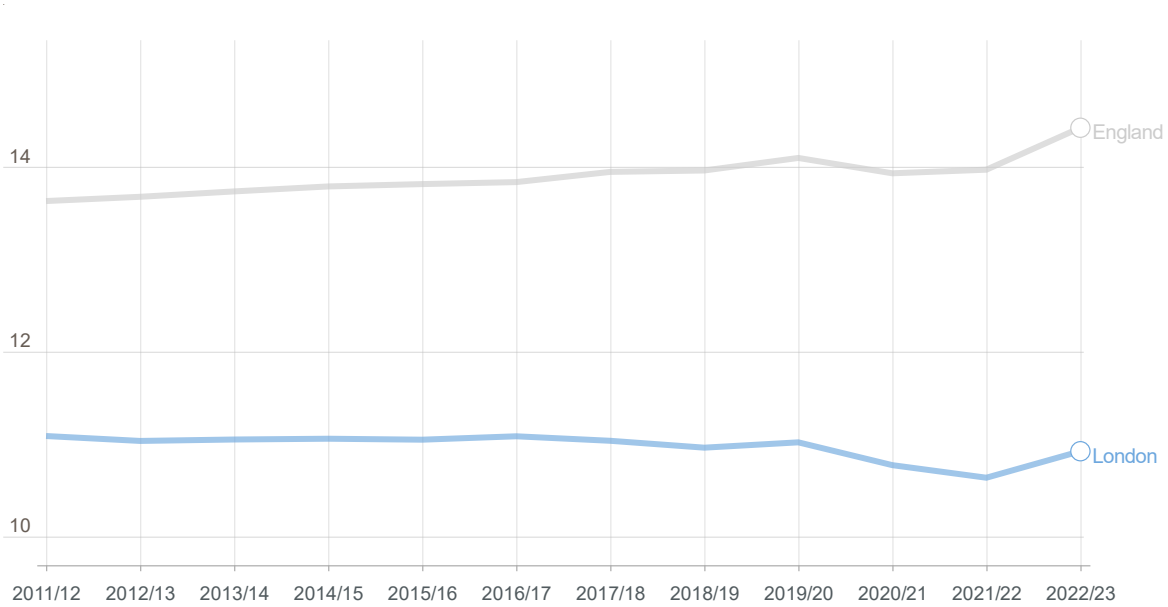
Source: NHS England Childhood Vaccination Coverage Statistics

Two doses of the Measles, Mumps and Rubella (MMR) vaccine prevent 99% of measles and rubella, and 88% of mumps infections. However, London's MMR vaccine uptake is significantly lower than England's and has been on a downward trend since 2015/16. The coverage of full vaccination with MMR (2 doses at age 5) in London was 74.0% in 2022/23, compared to 84.5% for England and well below the WHO target of 95% for herd immunity.

Other vaccines with relatively low uptake rates in London include the Hib/MenC at age 5 (since 2015/16) and DTap-IPV-Hib at age 5 (since 2017/18).

It is important to note that coverage varies across London boroughs. Variation in uptake and coverage between different communities can often reflect wider health inequalities; lack of access to NHS services; as well as trust and confidence issues. Coverage of both MMR vaccines varied markedly in 2022/23, from 56.3% in Hackney to 87% in Bromley (87%).

Figure 12: Prevalence of Hypertension in London and England (all ages)
2011/12 to 2022/23



Source: Public health profiles - OHID (phe.org.uk)

In London, people aged 65-80 from the most deprived backgrounds are more likely to be diagnosed with hypertension, as well as diabetes and coronary heart disease, than those in the least deprived decile. Black and South Asian groups in this age category are also more likely to have hypertension and diabetes.

Across boroughs, Bexley had the highest prevalence of hypertension, while Tower Hamlets had the lowest. Differences in age structure between boroughs may contribute to this variation. Also, this data relied on GPs diagnosing all hypertension cases; diagnoses may be inconsistent across GP practices. However, there are inequalities in the management of hypertension, with the most deprived Londoners least likely to have controlled hypertension.

The NHS Segmentation Model also shows that for Londoners aged 65-84, hypertension prevalence is higher among Asian (56.6%) and Black (56.4%) ethnic groups compared to White (42.3%).