CITY INTELLIGENCE

The State of London

Summary statistics about London's economy and society

January 2023

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Contents

1: INTRODUCTION

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

As the city recovered from the COVID-19 pandemic, it immediately faced another major challenge in the form of rising inflation and the knock-on impact on the cost of living for Londoners. The report sheds light on how London's people, businesses and places are addressing current economic and social challenges. Data are also provided on some of London's longer-term structural challenges identified and prioritised by the Mayor such as air quality, housing affordability and inequality.

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

Quarters referred to in the report are either calendar or financial as labelled. It Is not possible to use a consistent format throughout as it depends on the source data. Care should be taken when interpreting changes in quarterly data; some of the differences may be due to seasonal variation or other known and unknown issues with the data. Longer time series have been provided where available to provide an understanding of longer-term trends.

We intend to review this report along with some other outputs developed in response to the pandemic before releasing another version. We welcome any feedback you have via email to: intelligence@london.gov.uk.

Latest data are provided at the time of drafting the report in November 2022. A companion State of London Dashboard is published online where the charts in the report can be found. The Dashboard will be in beta phase while we continue to develop it.

2: CONTEXT

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

People

- The latest official estimate gave the population of London as **8.8 million at March 2021 Census**
- The population of London could reach **10 million by 2038** according to our central trend-based projections[1].
- London has a highly diverse population: **46% of Londoners belong to a Black, Asian, Mixed or Other ethnic group** (14% Black, 21% Asian, 6% Mixed and 6% Other ethnic group)[2].
- The majority of births in London are to mothers born overseas: **58% of London births were to mothers born overseas in 2020** compared to 23% for the rest of England and Wales.[3]
- There are large inequalities in many dimensions across the city. Household deprivation from the 2021 Census combines four aspects and reveals that just 39% of households in Richmond upon Thames show any aspect of deprivation, compared with 62% of households in Barking & Dagenham. At ward level, the differences are even more extreme, with only 29% households in Northcote ward (Wandsworth) showing any aspect of deprivation contrasting with 74% of households in Southall Green (Ealing).
- Around **5 million residents are economically active** (aged 16 and over) in London with 4.8 million in employment[4].

Economy

- London's economy was worth **£470 billion** in 2020 as measured by Gross Value Added, accounting for 24% of UK economic output[5].
- There are around **1 million registered private sector businesses** in London, 19% of the total in the UK[6].
- There are over **6 million workforce jobs** in the city filled by commuters and London residents[7].

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[1] GLA City Intelligence Unit. 2020-based demographic projections, December 2021
[2] Census 2021
[3] ONS Births by mother's country of birth
[4] ONS Labour Force Survey, Jul 2022-Sep 2022 via Nomis.
[5] ONS Regional economic activity by gross domestic product, UK: 1998 to 2020
[6] BEIS Business population estimates for the UK and regions, 2022.
[7] ONS Workforce Jobs, June 2022

- London's workers are highly productive – **GVA per job is on average £80,000** which is 43% higher than the UK average[8].
- For all London's prosperity, it has deep-seated inequalities. Multiple sources show that around 6% of Londoners are in debt, behind on rent or bills, in very low food security, with around 10% more really struggling, sometimes going without or getting behind with their bills. The proportion comfortable financially is falling.

Place

- London is comprised of **32 borough councils and the City of London**.
- London covers almost **160,000 hectares** making it the smallest region in the UK by land area but with the highest population density (56 people per hectare)[9].
- **Between 48-51% of London's landmass is 'green' or 'blue',** which includes parks, gardens, trees, green spaces, rivers and wetlands[10].
- There are approximately **3.7m residential dwellings** in London, of which 49% are owner occupied, 29% are private rented, and 22% social housing[11].

[8] GLA Economics calculations using ONS regional GDP and workforce jobs data.
[9] GLA City Intelligence Unit. Land Area and Population Density by Ward and Borough.
[10] GLA City Intelligence Unit analysis of Ordnance Survey and Verisk Analytics GeoInformation Group UKMap data, 2019.
[11] DLUHC Dwelling Stock Estimates in England: 2021

3: KEY STORIES FOR LONDON

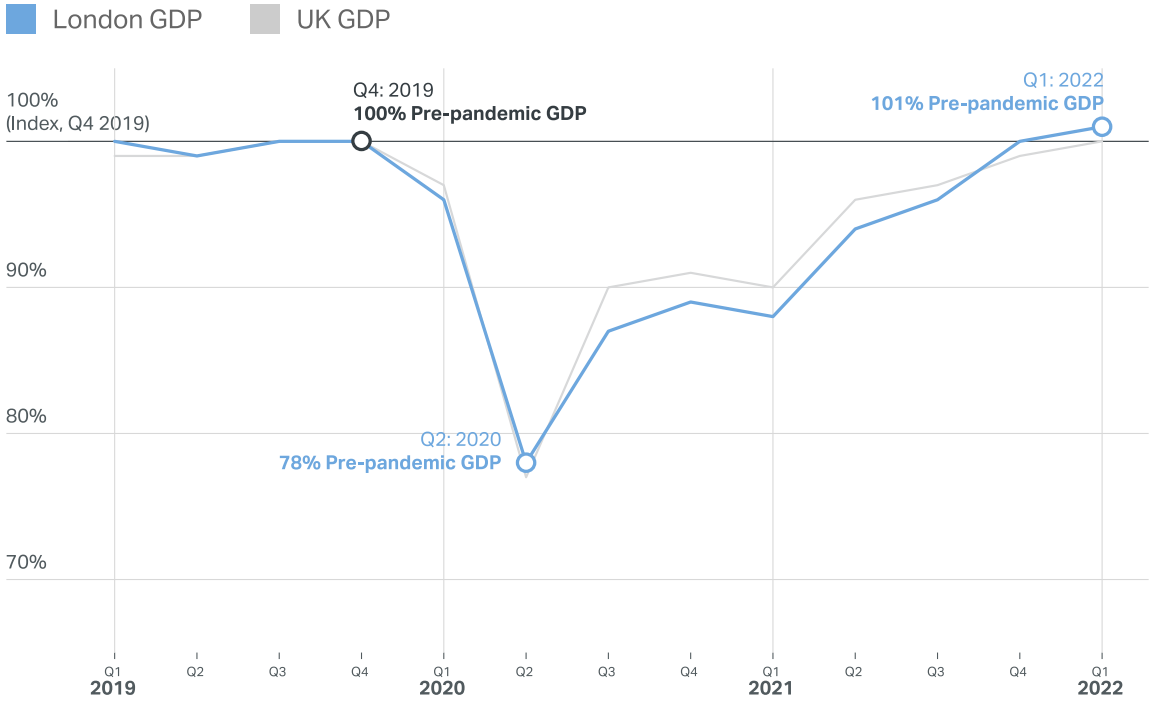
While it is not possible to summarise all the information presented in this report, the following summary highlights findings across a range of chapters which show how the city is developing and some areas of change.

London has continued to recover from the pandemic since the first edition of this report in June 2022, and by October 2022 the impact of inflation on the city became increasingly evident as it affected both households and businesses.

Economy and Labour Market

London's economy recovered strongly from the pandemic, but we expect it has entered a fresh recession starting in the second half of 2022 as rapid inflation drags on incomes and spending.

While the outlook is challenging, output and jobs in the capital are likely to see a lighter impact from the cost of living crisis than wider UK averages.



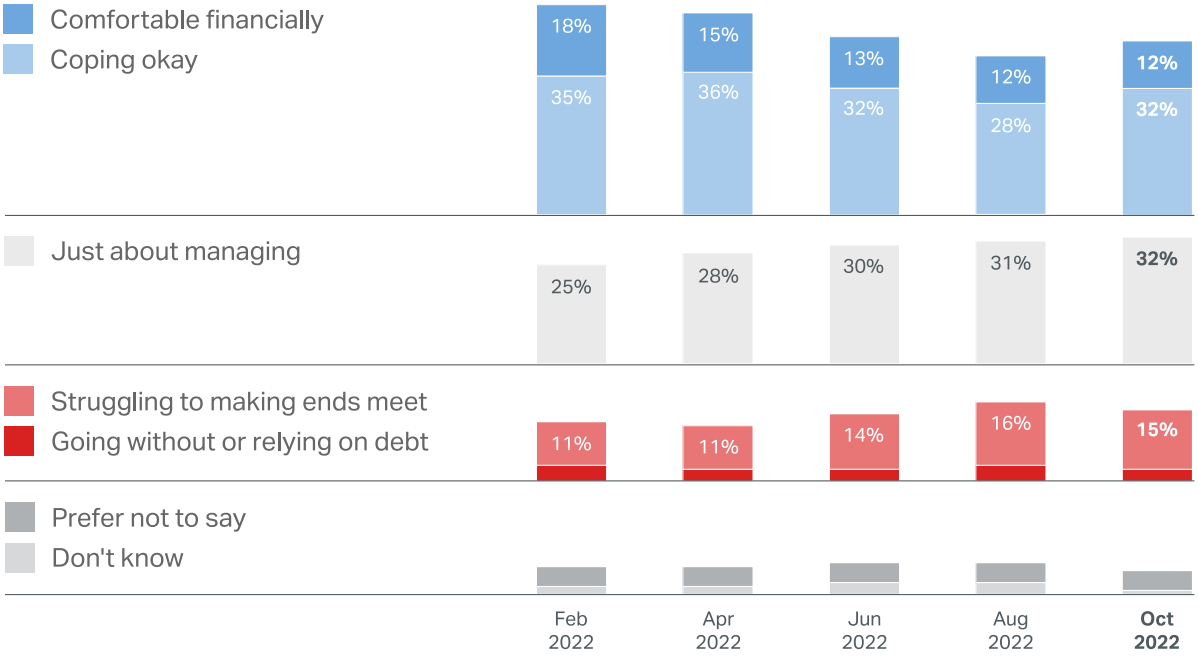
GDP for London and the UK, indexed to their levels in Q4 2019

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

Income, Poverty and Destitution

One in seven Londoners (15%) said they were struggling financially, with a further 3% not able to manage; going without or relying on debt to pay for their basic needs.

Due to financial pressures, 14% of Londoners had regularly (6%) or occasionally (8%) gone without food or essentials or had to rely on external support such as food banks over the previous six months.



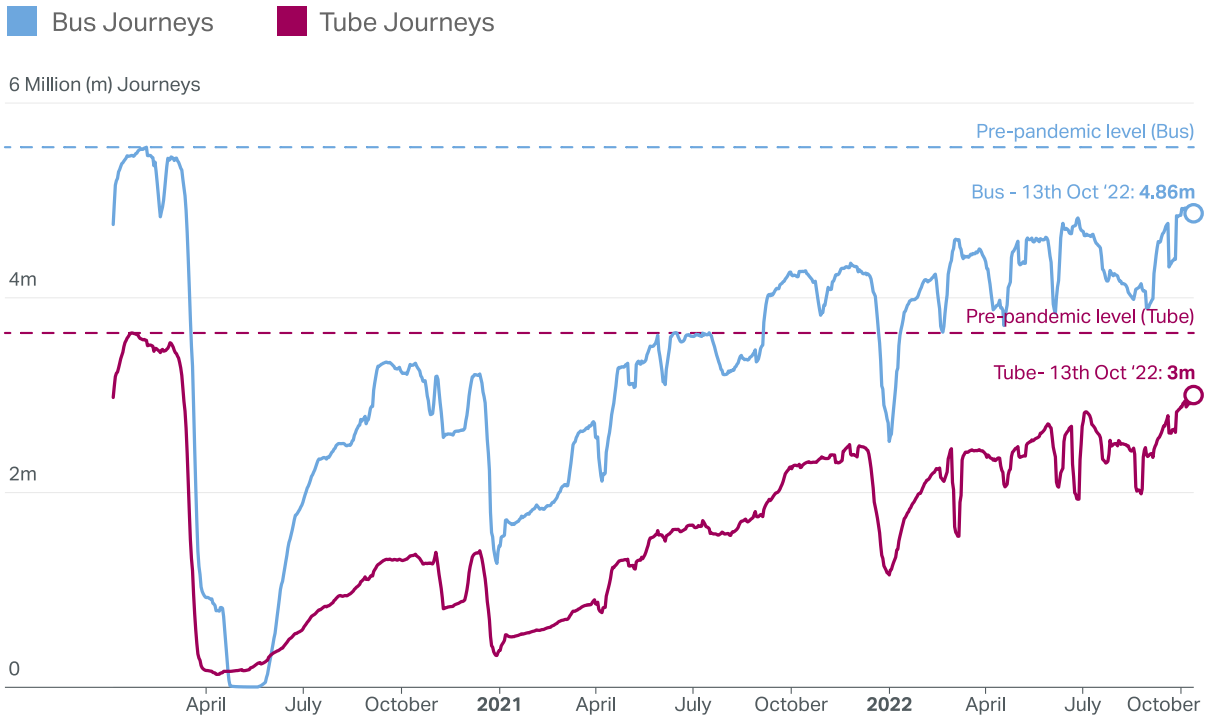
From Feb to Oct 2022, survey respondents answering the question:
"Thinking about your current financial situation, which of these statements best applies to you?"

Source: YouGov Survey Jan-Oct 2022
All figures, unless otherwise stated, are from YouGov Plc for the GLA. Total sample sizes were between 1015 and 1299 adults. The surveys were carried out online. The figures have been weighted and are representative of all London adults (aged 18+).

Graphic: GLA City Intelligence

Transport and Infrastructure

Travel in London is recovering from the pandemic, but there is still a lasting legacy. Public transport demand has risen steadily during 2022, with buses and tubes reaching a high point of 82%-84% of pre-pandemic levels.

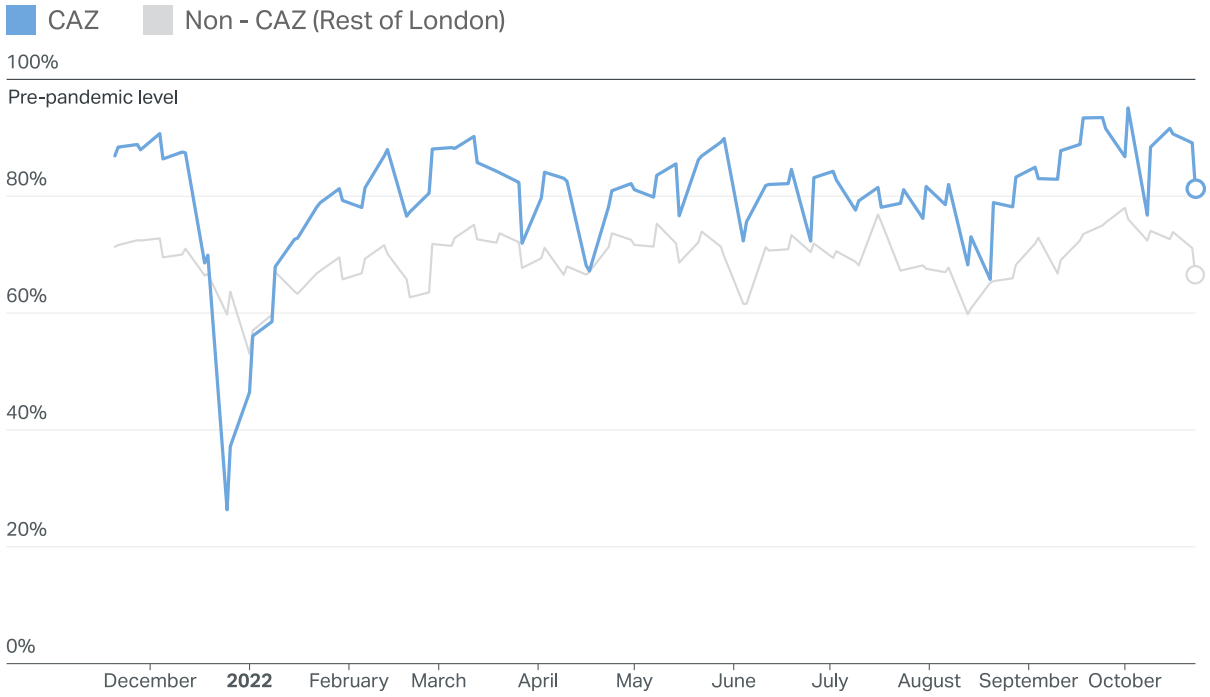


Number of journeys by Bus and Tube on the TfL network

Source: TfL network demand dashboard
Graphic: GLA City Intelligence

Communities

But High Street footfall within the Central Activities Zone (CAZ) has still not recovered to the level seen in 2019.

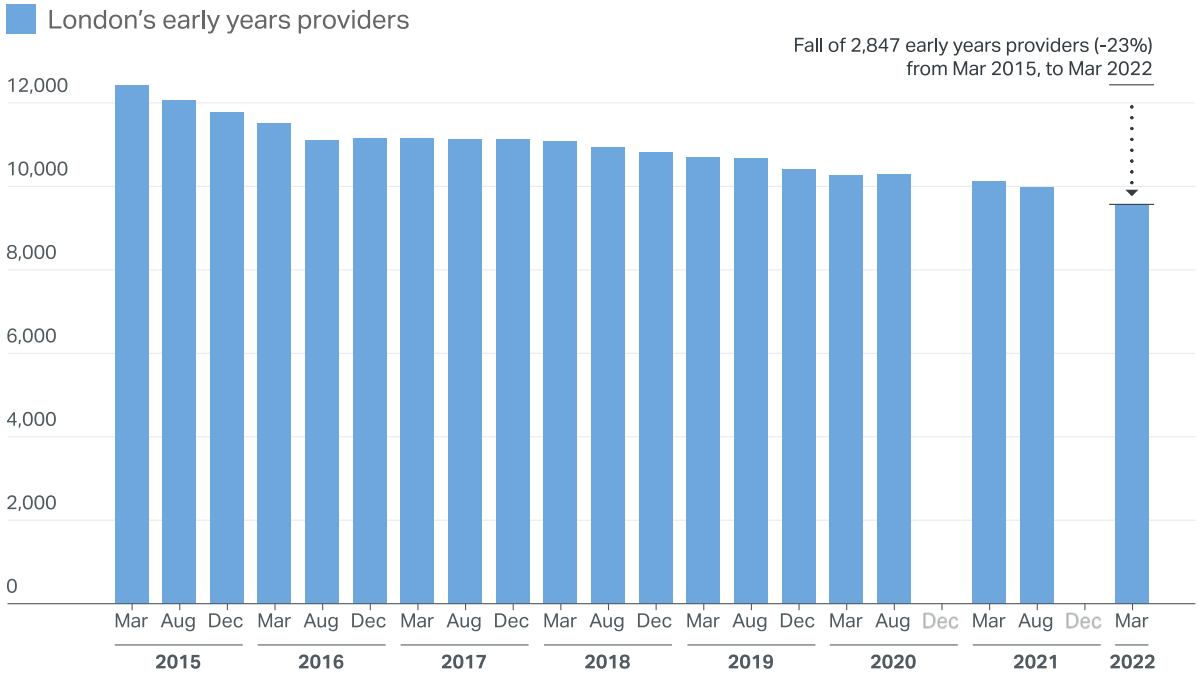


Proportion of 2019 footfall in local high streets in the CAZ and outside of the CAZ, using weekend visitors at 12pm (%)

Source: Anonymised and Aggregated data by O2
Graphic: GLA City Intelligence

Young People & Education

Childcare supply is an increasing challenge for families. The number of early years providers continues to decrease across the capital as a result of long-standing financial challenges and more recently the impact of COVID-19 on income and demand.



Number of registered early years providers across London between 2015 and 2022

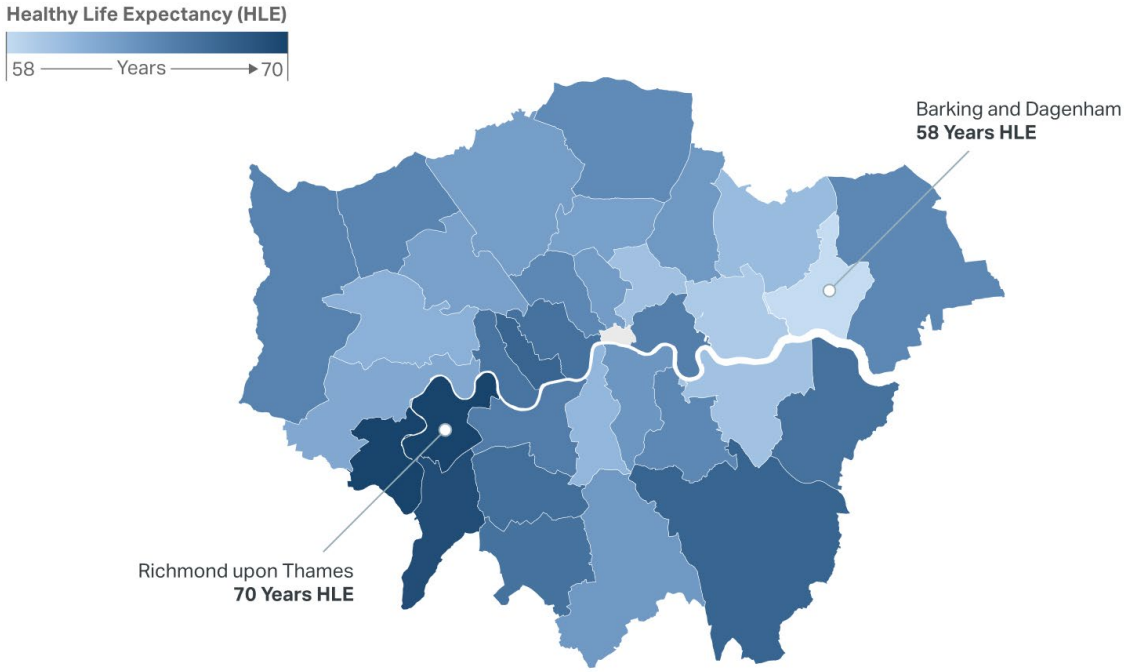
Source: Ofsted
Note: Data was not collected for December 2020 due to COVID-19, and from 2021 has switched to twice yearly.
Graphic: GLA City Intelligence

Health, Wellbeing and Inequality

Healthy life expectancy (HLE) estimated at birth shows a substantial gap of more than 12 years between some of the poorest and most advantaged boroughs.

While overall London HLE values at birth are higher than the national average, for adults of 60–64 years London's advantage is overturned.

This is likely due to the out-migration of more affluent adult Londoners.



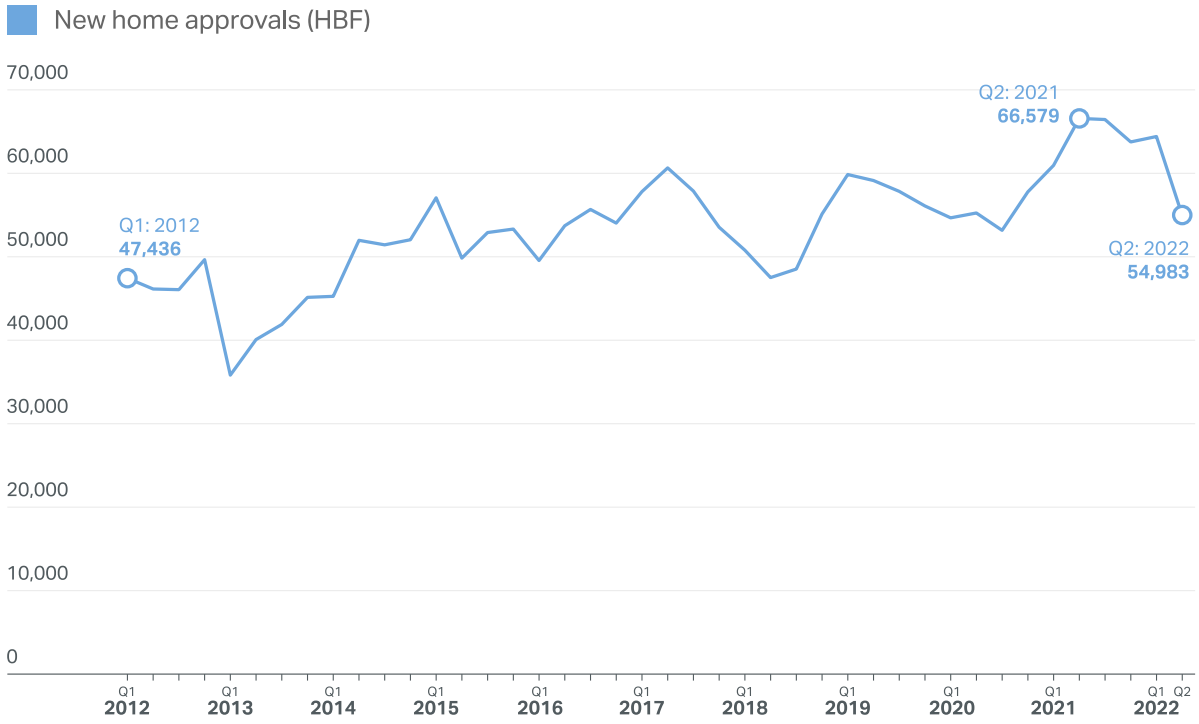
Healthy life expectancy (HLE) of male Londoners at birth

Source: Health state life expectancy, all ages, UK - Office for National Statistics (ons.gov.uk)
Note: Data cover 2018 – 2020. Value not available for City of London due to small population.
Graphic: GLA City Intelligence

Housing

There was a fall in the number of new homes given planning approval in London in the year to June 2022.

This was most likely in response to the increase in development costs driven by rising construction material prices.

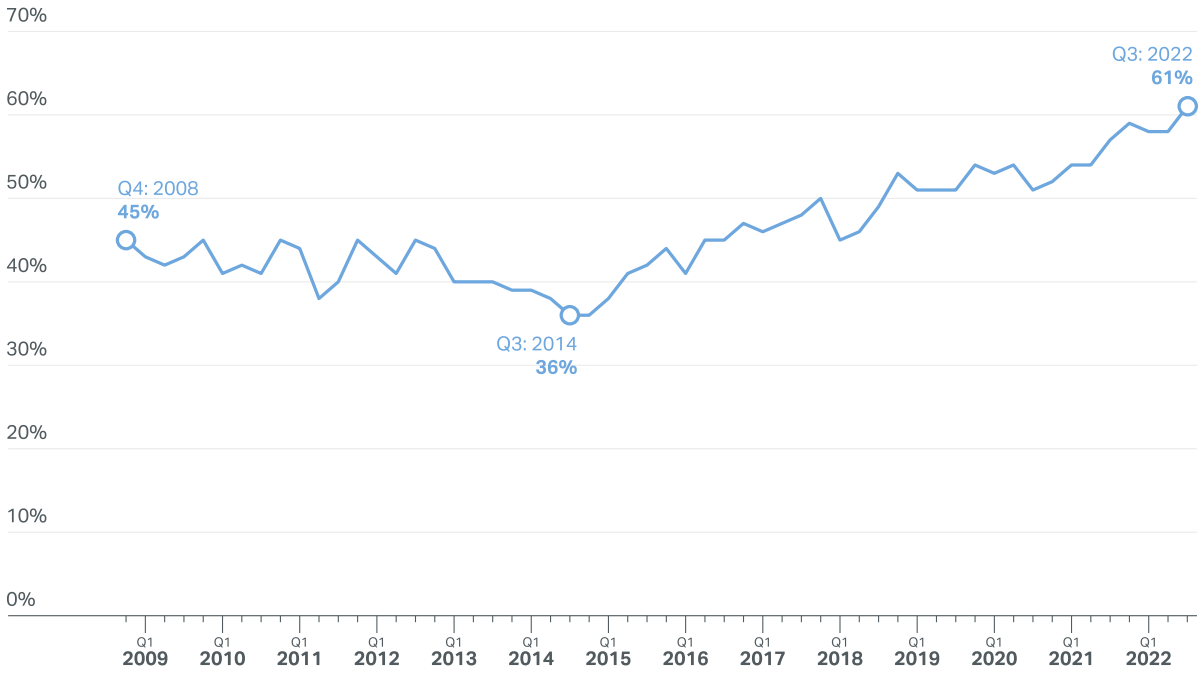


Annualised number of new homes granted planning permission in London, Q1 2012 to Q2 2022

Source: Home Builders Federation (HBF)
Graphic: GLA City Intelligence

Environment

But data show that the energy efficiency of dwellings added to the Buildings Register continues to increase, reaching a new peak of 61% of new and existing dwellings with an energy performance certificate rated as A-C in the third quarter of 2022



Percentage of new and existing dwellings added to the Buildings Register with an energy performance certificate rated as A-C

Source: Energy performance certificates for Buildings Register for England and Wales
Graphic: GLA City Intelligence

4: DEMOGRAPHY

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

Official population estimates are published annually but with a significant lag. The most recent data available at subnational level covers the period up to mid-2020 only. Alternative sources and indicators are presented here to provide more timely insights into recent trends.

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

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

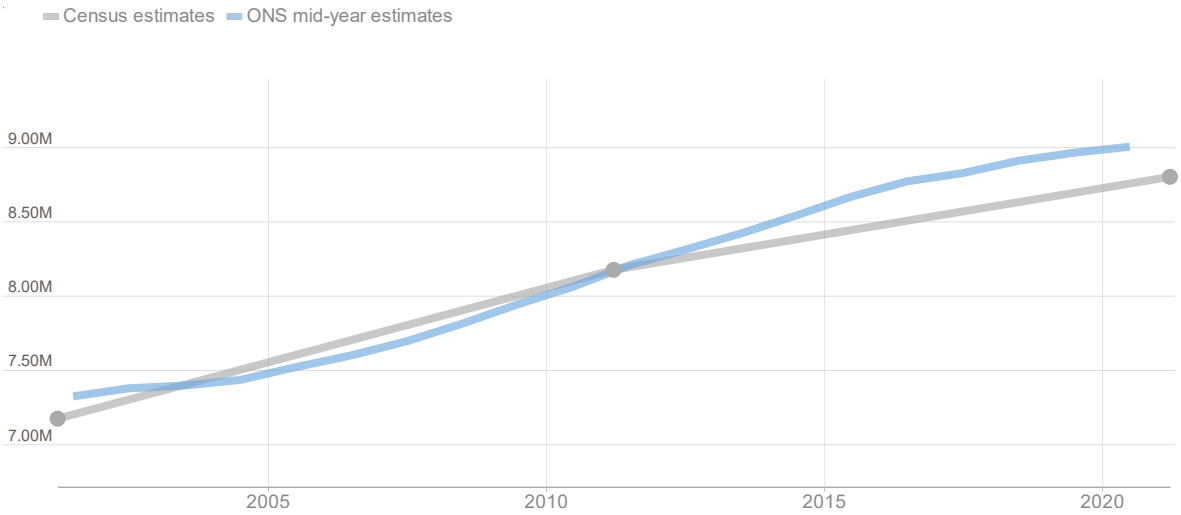
The latest population projections published by the GLA Demography team can be accessed via the 'Population and household projections' pages of the London Datastore.

Further analysis and reporting of 2021 Census data for London is published through the GLA's Census Information Scheme.

Population change

Figure 1: Estimated population of London 2001 to 2021

Total population (millions)



Sources: ONS mid-year estimates, ONS Census estimates

The first release of data from the 2021 Census estimated London's population to be 8.8 million on 21 March 2021 whereas ONS had previously estimated the population of London as 9.0 million at mid-2020.

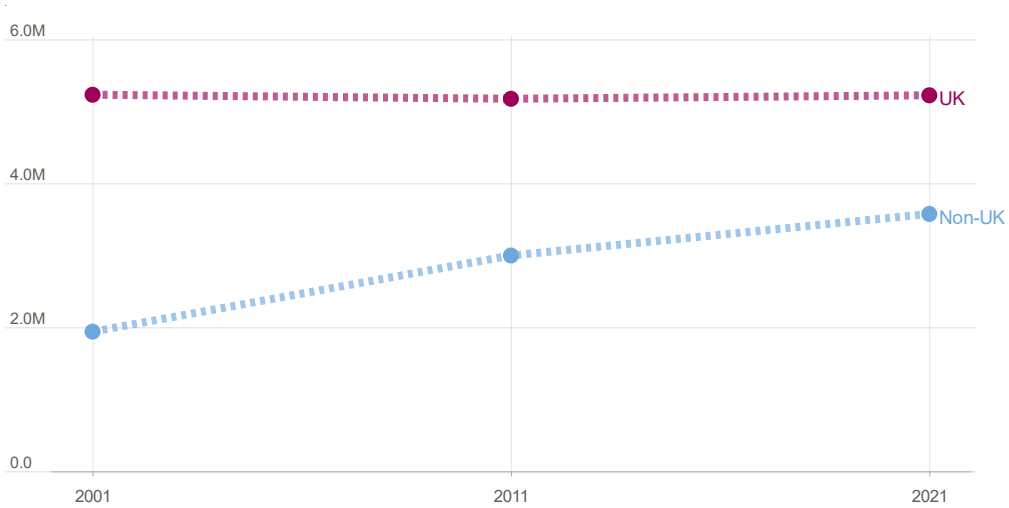
The census estimate is lower than the previous annual estimate for two separate reasons: firstly, official population estimates for many parts of London have become increasingly inflated since the previous census; secondly, the COVID-19 pandemic led to a temporary drop in London's population that began in March 2020 and likely reached a peak in early 2021.

Quantifying the impact of each of these two effects is challenging and this has added complications to the process of producing the 2021 mid-year estimates and creating a consistent series of annual estimates for the preceding decade.

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

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

Total population (millions)



Source: ONS Census estimates

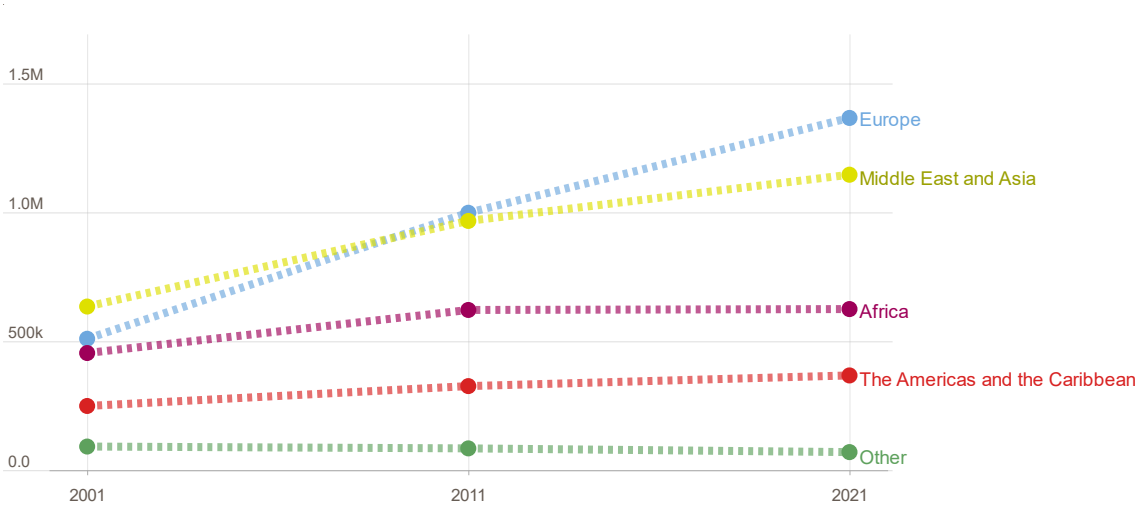
The first tranche of data from the 2021 Census included a breakdown of population by country of birth. This data shows that 41% of London residents were born outside of the UK – up from 37% in 2011, and 27% in 2001.

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

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

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

Total population (thousands)



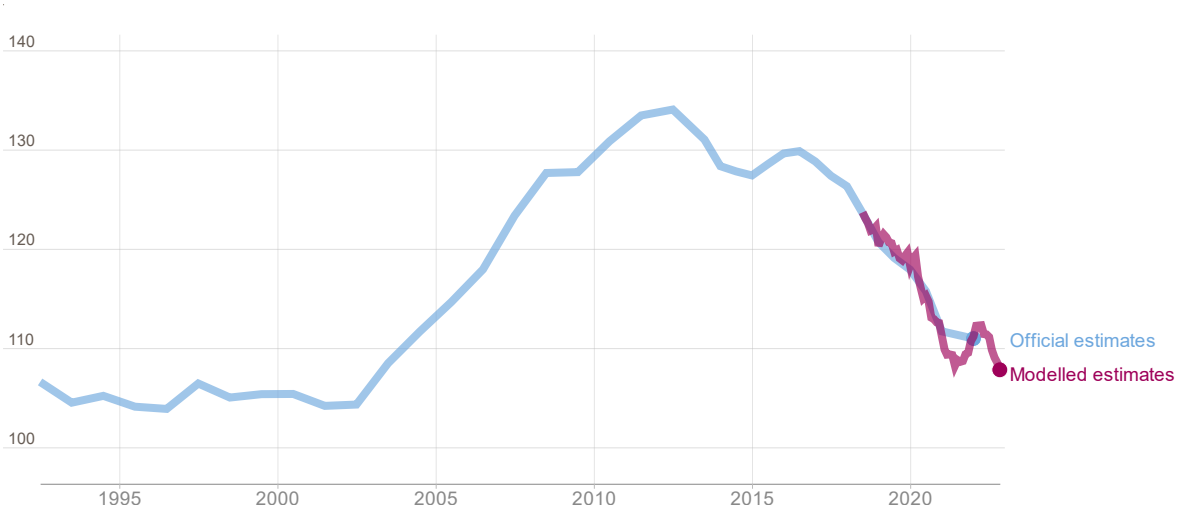
Source: ONS Census estimates

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

Annual births

Figure 4: Annual births in London 2001 to 2022

Annual live births for year ending (thousands)



Sources: ONS Live birth estimates, ONS mid-year estimates, GLA modelled births

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

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

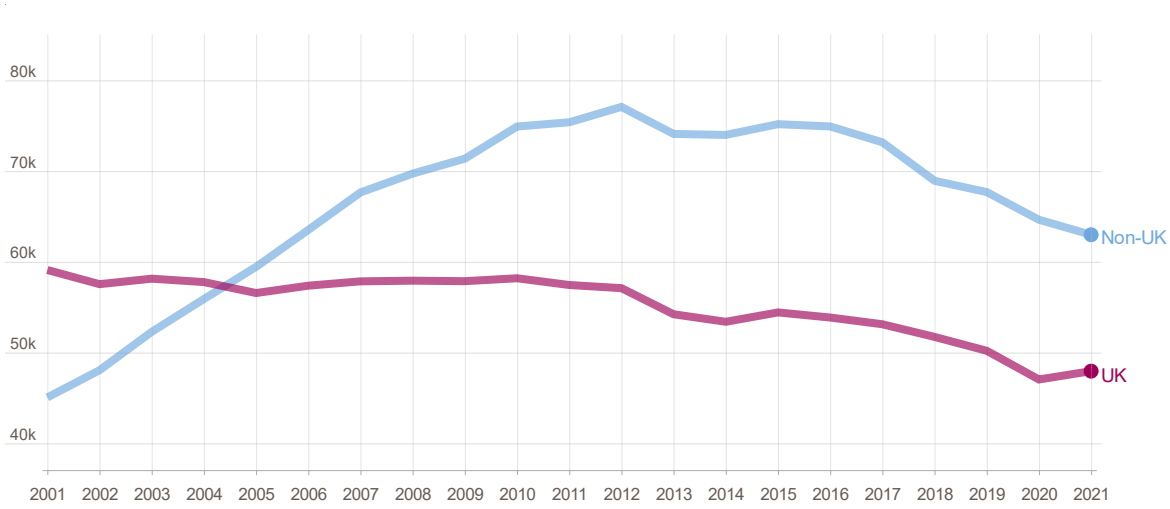
modelled estimates can be produced with less lag than the official estimates and therefore provide an indication of more recent trends.

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

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

Figure 5: Annual births in London by mother's region of birth 2001 to 2021

Annual live births by calendar year (thousands)

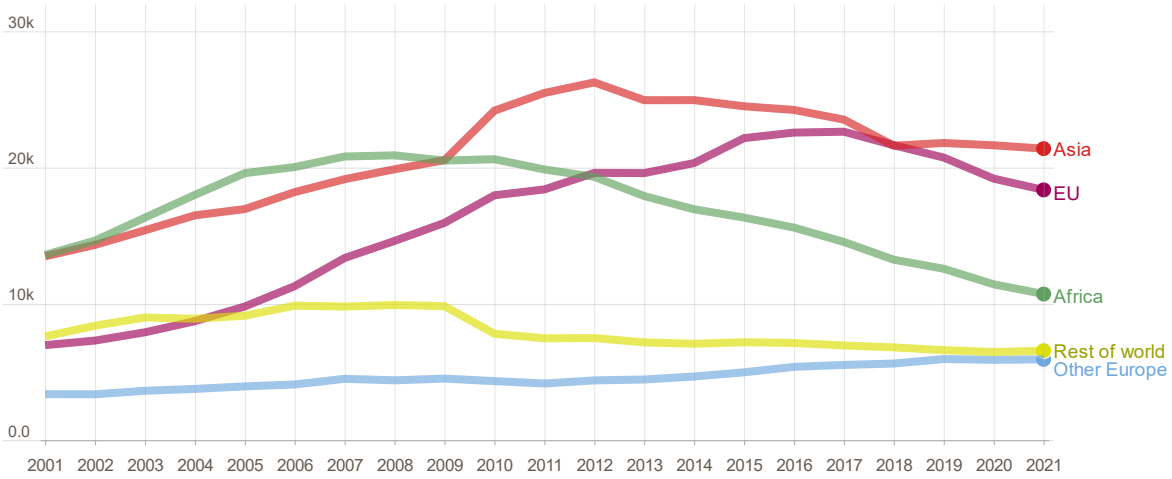


Source: ONS Live birth estimates

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

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

Annual live births by calendar year (thousands)



Source: ONS Live birth estimates

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

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

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

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

5: THE ECONOMY & LABOUR MARKET

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

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

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

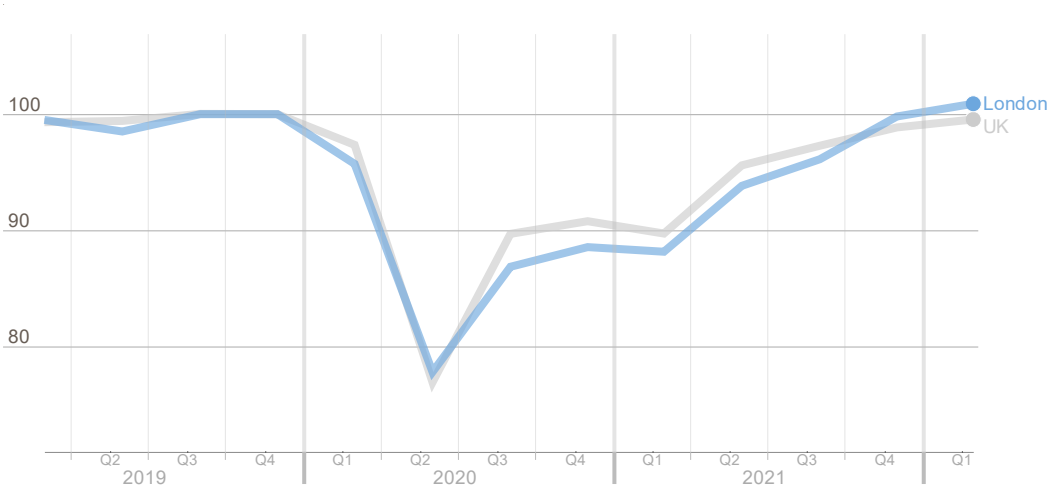
For more information on the state of London's economy, see the monthly GLA Economics publication, 'London's Economy Today'. An assessment of future prospects for the city's economy, including economic forecasts, is provided in the bi-annual publication 'London's Economic Outlook'. More detailed analysis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

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

Economy and Business

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

Index, Q4 2019 = 100

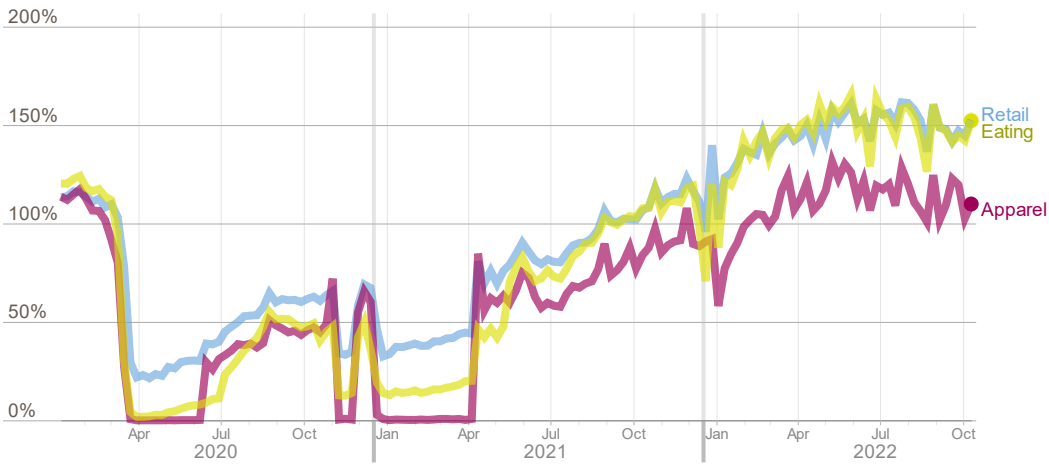


Source: GLA calculations, Office for National Statistics; Note: 'Nowcast' refers to the ONS' Model-based early estimates of regional gross value added, which are experimental estimates of output growth produced using an econometric model. More information is available in the latest release.

London's economy took a harder hit from the pandemic than most other regions of the UK. However, the recovery in 2021 was also stronger than in other regions, and output returned to pre-pandemic levels by around early 2022. The ONS estimates that London's output made continued progress at the start of 2022, with GDP up 14.4% year-on-year. This compares to long-run average growth of plus 3%. After a strong recovery in 2021, when output grew 8.3% in London, GLA Economics expects the continued momentum in early 2022 to result in 6.9% growth for the year. However, the cost of living crisis now dominates the outlook, and we expect a recession starting in late 2022 to prompt a decline of 0.8% across 2023 on average. This comes alongside a forecast for jobs growth of 3.6% in 2022 and a dip of 0.2% in 2023.

Figure 2: Monthly spend across London on weekdays

% of the corresponding 2019 monthly values

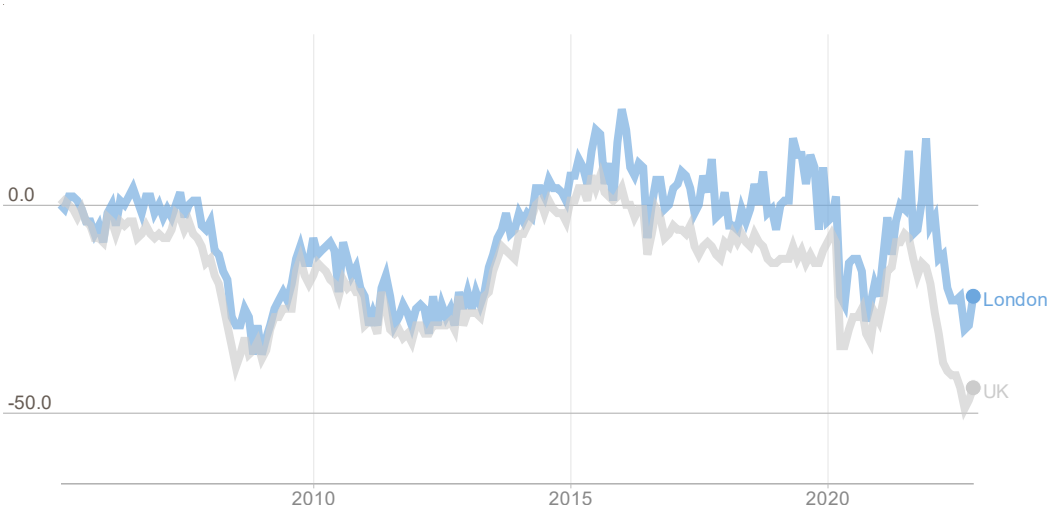


Source: GLA City Intelligence, Mastercard's Retail Location Index.

Consumer expenditure, according to Mastercard data, has slowed in London, but remains well above pre-pandemic levels. After Plan B restrictions saw consumption fall in late 2021, retail spending recovered strongly across this spring and summer, surpassing the late 2021 peak in April 2022. Growth continued to grow in real terms until early July 2022, despite rapidly rising prices. However, spending fell across August and has hovered around a lower level since then. Eating has followed a similar trend, while apparel spending has not recovered as far above pre-pandemic levels.

Figure 3: Consumer confidence in London

Confidence index, 0 = neutral



Source: GfK NOP

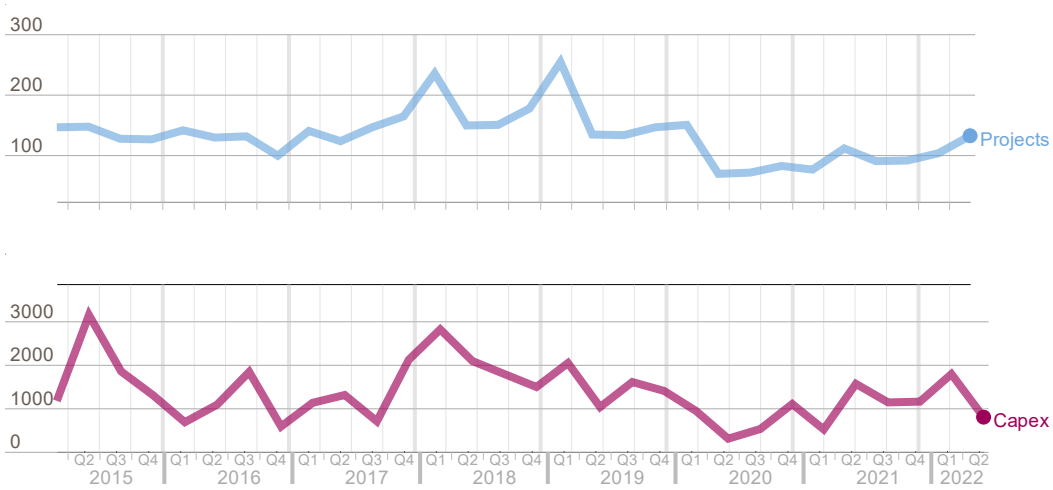
Consumer confidence in London rebounded a little in November 2022, going against a sharp downward trend since early 2022. The figure rose to -22, from -29 in October. However, this figure is still far below the neutral mark of zero, and remains comparable to the worst lows of the pandemic. Rapidly rising inflation is depressing

household sentiment, and recent months have seen some of the worst readings since the financial crisis of 2008.

Yet the national figure for consumer confidence presented an even worse picture, with the UK index at -44, up a modest three points from October's figure. September's reading of -49 was a record low since the data series began in 1974. This means that while London's consumers are pessimistic, they are currently less negative than the average UK household.

Figure 4: Foreign Direct Investment (FDI) into London

Number of projects (top series) and Capex £m (bottom series)



Source: fDi Markets, from the Financial Times Ltd 2021

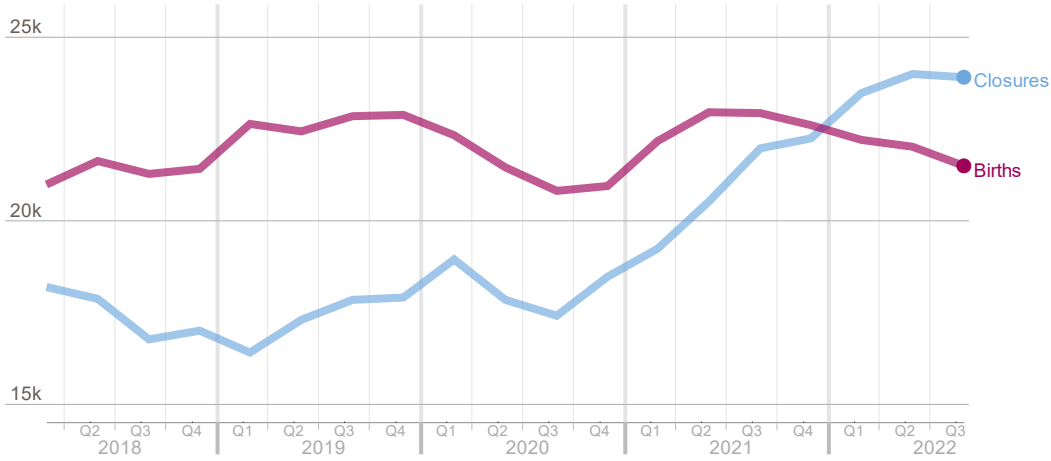
In April to June 2022 there were 132 FDI[12] projects into London, worth £0.8bn in capital expenditure according to estimates by fDi Markets. In the five years before the pandemic the average was around 150 FDI projects worth £1.6bn per quarter.

The latest quarterly figures represent a drop-off from the post-pandemic mini-revival in FDI. Capital expenditure recovered to pre-pandemic levels at the start of 2022, but the combination of a weak growth outlook and rising interest rates will make further progress harder.

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

Figure 5: Business births and closures

Number of births and closures (four-quarter moving average)



Source: ONS Business Demography. Note: experimental data.

In London's vibrant business sector, business births have in recent years consistently exceeded business closures[13]. Following a dip in both business births and closures at the outbreak of the pandemic in 2020, both began to rise suggesting a high rate of business churn.

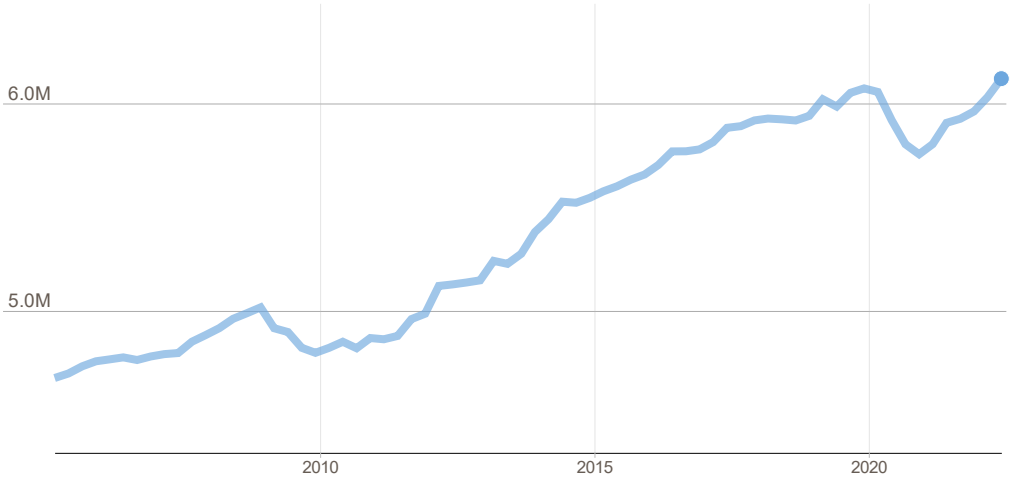
Concerningly, since mid-2021, business births have declined, while business closures have continued to rise. In the last three quarters, London has now seen more business closures than births, on a four-quarter rolling basis, for the first time since the series started in 2017. In the last year, on average London has seen over 5,000 more businesses close than open per quarter. While we do not have by-sector data for London, nationally the sector with the largest net closure of businesses was Professional and technical services, though the sector where net closures were growing fastest was Transportation.

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

Jobs

Figure 6: Total Workforce Jobs

Number of jobs (millions), latest data for June 2022



Source: ONS Workforce Jobs. Note: The margin of error for all jobs is +/- 0.9% for London and +/- 0.3% for the UK. This is a workplace-based measure.

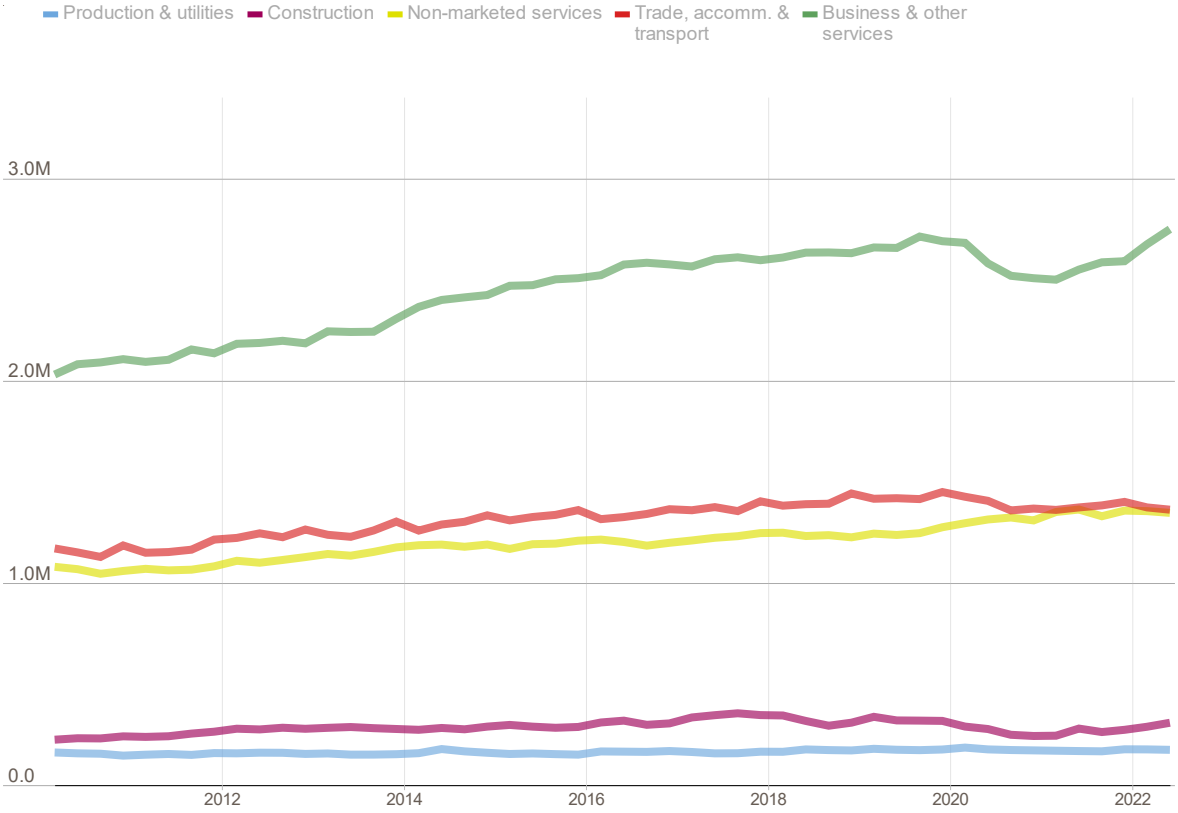
The Workforce Jobs series provides quarterly estimates of the number of jobs and is the ONS' preferred metric for jobs by region of workplace and industry.

The estimated number of workforce jobs in London increased to 6.12 million in June 2022. This latest estimate represents a small increase, of approximately 47,000 or 0.8% from December 2019 levels (the pre-pandemic peak in London).

The recovery in workforce jobs in London varies considerably across its two major components. The number of employee jobs increased by 127,000 (2.4%) between December 2019 and June 2022, while the number of self-employment jobs decreased by 79,000 (9.6%).

Figure 7: Workforce Jobs profile by broad sector

Number of jobs in sections A-S (millions), latest data for June 2022



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

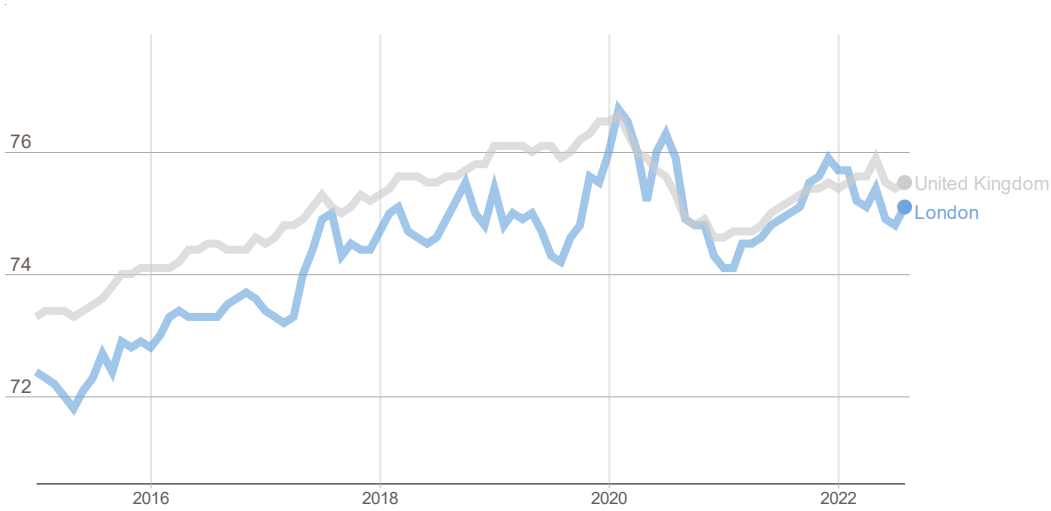
Over recent decades, the composition of London's economy has seen a shift in employment towards services and away from primary and production activities.

By June 2022, there were 2.75 million jobs in business and other services, including professional and IT services, up from 2.08 million for the same period in 2010 (a 32% increase). The number of jobs in non-marketed services, such as health and education, increased from 1.07 million to 1.35 million over the same period (an increase of 26%).

Over time, the London economy has also become relatively less involved in primary and production-based activities. These accounted for only 2.9% of workforce jobs in June 2022 compared to 9.7% for the UK overall.

Figure 8: Employment rate

% aged 16-64, latest data for period Jun 2022-Aug 2022



Source: ONS Labour Force Survey. Note: the margin of error for employment rate estimates is +/- 1.5% for London and +/- 0.1% for the UK.

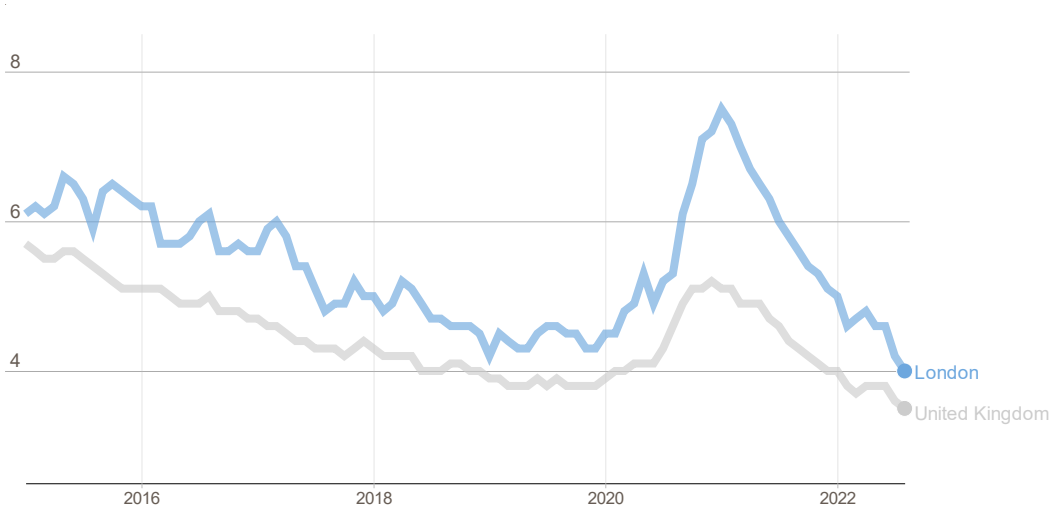
The employment rate is the proportion of people aged between 16 and 64 years who are in paid work or have a job that they are temporarily away from.

For June to August 2022, the employment rate in London was estimated at 75.1%. This was down 0.3 percentage points (pp) on the previous quarter and up 0.1pp from a year earlier.

The overall UK employment rate was estimated at 75.5% – down 0.4pp on the quarter and up 0.3pp on the year.

Figure 9: Unemployment rate

% economically active population, latest data for period Jun 2022-Aug 2022



Source: ONS Labour Force Survey. Note: the margin of error for unemployment rate estimates is +/- 1% for London and +/- 0.2% for the UK.

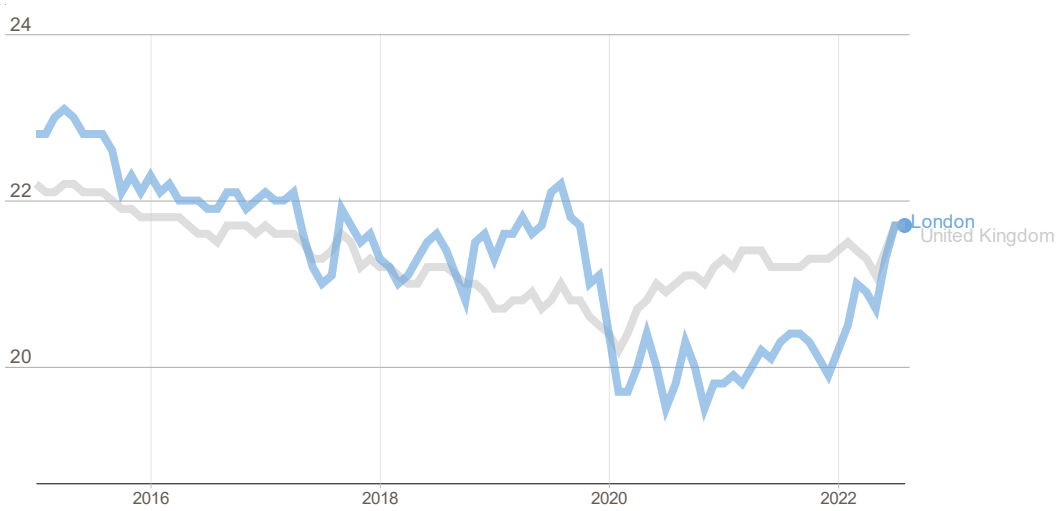
Unemployment measures people without a job who have been actively seeking work within the last four weeks and are available to start work within the next two weeks.

For June to August 2022, the unemployment rate for London was estimated at 4.0% – down 0.6pp on the quarter and down 1.8pp from a year earlier.

The UK unemployment rate was lower at 3.5% – down 0.3pp from the previous quarter and 0.9pp on the year.

Figure 10: Economic inactivity

% aged 16-64, latest data for period Jun-2022-Aug 2022



Source: ONS Labour Force Survey. Note: the London margin of error is not published for economic inactivity rates, the UK margin is +/- 0.4%.

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

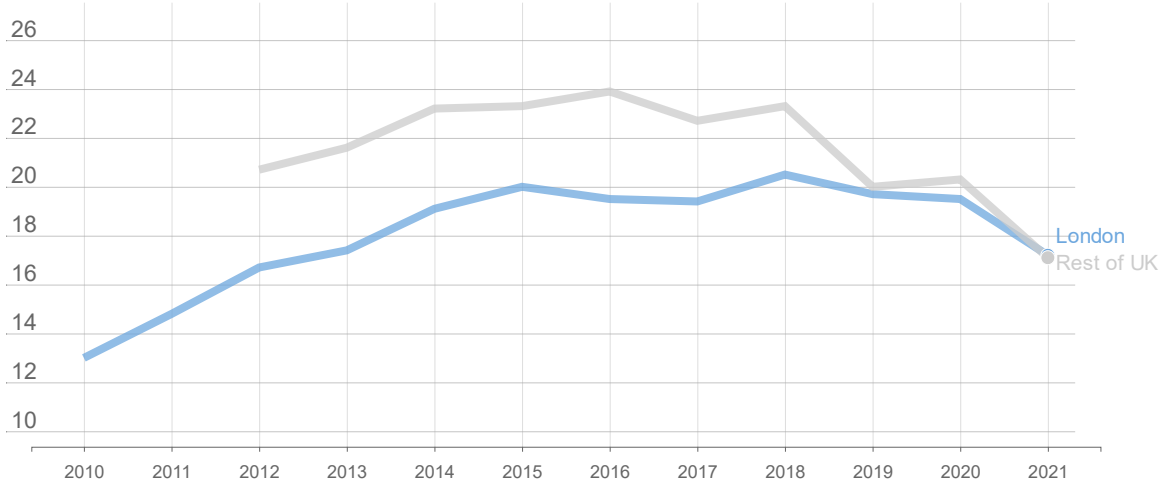
For June to August 2022, the rate of economic inactivity in London was estimated at 21.7%. This was up 1pp on the previous quarter and up 1.3pp on the year.

The UK rate of economic inactivity was also 21.7%. This was up 0.6pp on the previous quarter and up 0.5pp on the year.

Long term sickness and being a student were the main reasons for economic inactivity in London in the 12 months to June 2022. A quarter (24%) of economically inactive Londoners said their inactivity was because of a long-term illness and 34% said it was because they were a student. Recent increases in inactivity have been larger for young people and for women aged 50 to 64 years.

Figure 11: Employee jobs below the LLW & UKLW

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



Source: Annual Survey of Hours and Earning, Note: 2021 data provisional.
Chart: GLA Intelligence – see London Datastore.

The London and UK Living Wage rates are calculated annually based on actual living costs. In previous years, Living Wage rates have tended to increase faster than official inflation measures and general pay rises.

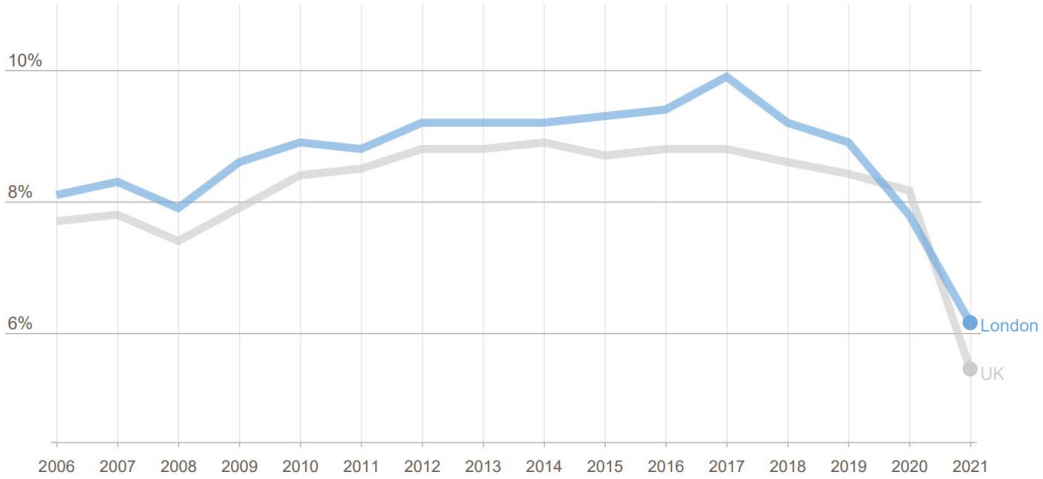
Around 17% of employee jobs in London were paid below the London Living Wage in 2021, a similar share for employee jobs for the rest of the UK.

The proportion of employees across London earning below this level increased between 2010 and 2015, then remained more stable until 2020. Between 2020 and 2021, the trend has been slightly decreasing.

The figures for 2020 and 2021 include some people furloughed under the Coronavirus Job Retention Scheme, at a reduced rate of pay. But this also sits alongside job losses which occurred during the coronavirus pandemic. The data suggest that these job losses may have been disproportionally those on the lowest levels of pay.

Figure 12: Workers in insecure employment

% of workers in insecure employment



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

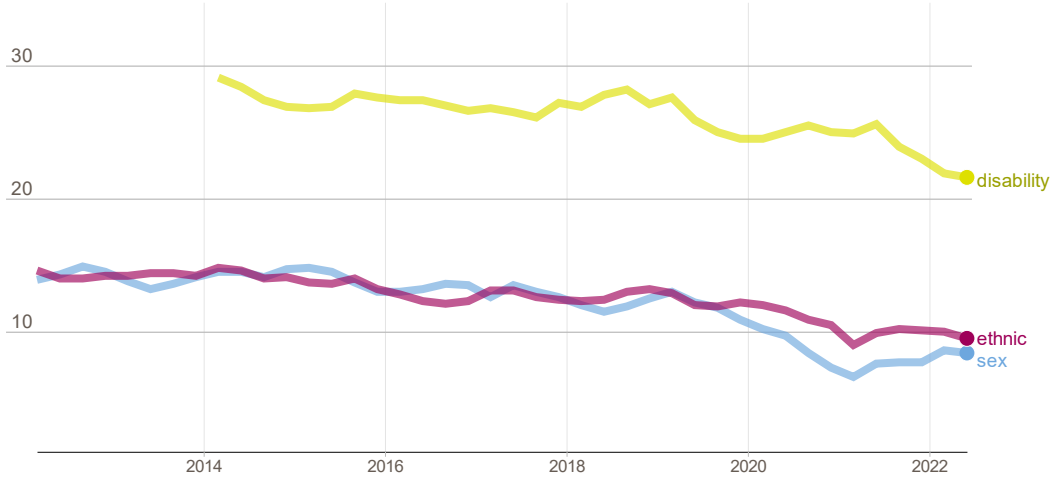
The measure of insecure work used here covers those either employed in a job with a temporary contract, working through an employment agency or self-employed in occupations considered insecure (such as caring, leisure or other service occupations, process plant and machine operatives or in elementary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

The share of workers in insecure employment in London fell to 6.2% in 2021, its lowest level since at least 2006, after falling rapidly from a peak of 9.9% in 2017.

However, the London share remains higher than for the UK overall (5.5%). The fall in insecure employment in 2021 is also likely to reflect, in part, the negative impacts of the pandemic on low-paid sectors, including hospitality, and self-employment jobs.

Figure 13: Employment rate gaps

Percentage points difference, latest data for period Jul 2021-Jun 2022



Source: ONS Annual Population Survey.

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

The latest gap between male and female Londoners is 8.4 percentage points (pp). This is slightly above the national average (7.1pp) and has been rising since falling to a low in 2021.

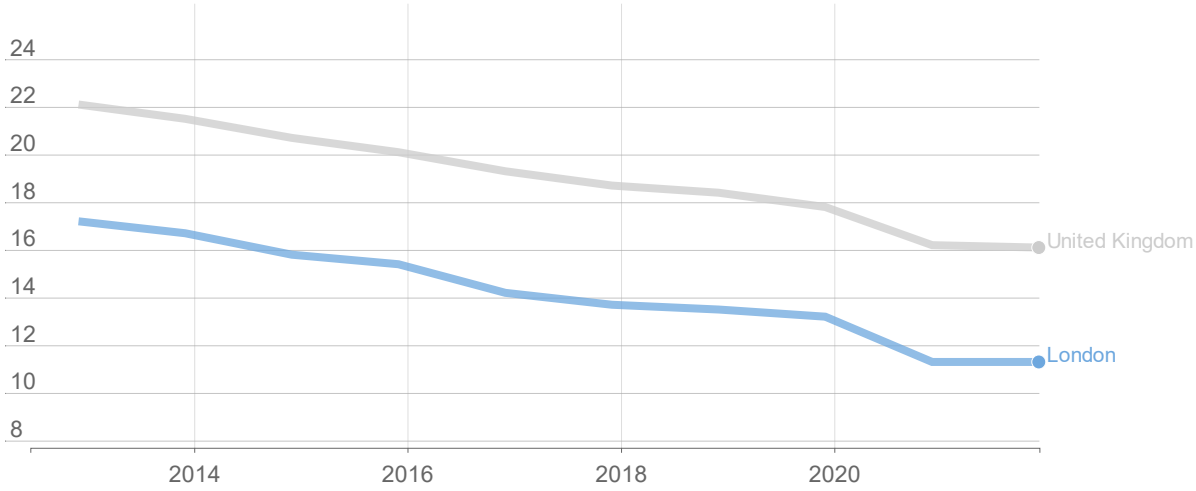
The latest gap between all White Londoners and Londoners from all other ethnic backgrounds combined is 9.5pp. This is 2pp higher than the national average.

The latest gap between Londoners with disabilities and Londoners without disabilities is 21.6pp. This is below the national average (26.4pp) and is at its lowest since the start of the data series in 2014.

Skills

Figure 14: Population with no/low qualifications

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



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

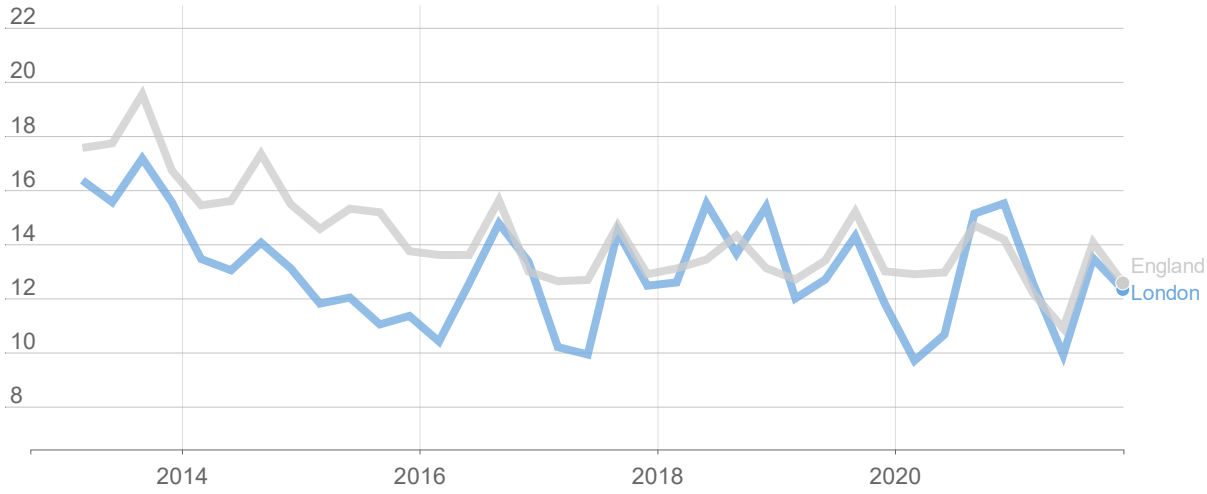
'No or low qualifications' includes people with no qualification at Level 2 or higher, equivalent to a GCSE 'pass' (grade A*-C or new grade 9-4).

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

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

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

% aged 18-24 (four-quarter moving average), latest data for period Oct 2021-Dec 2021



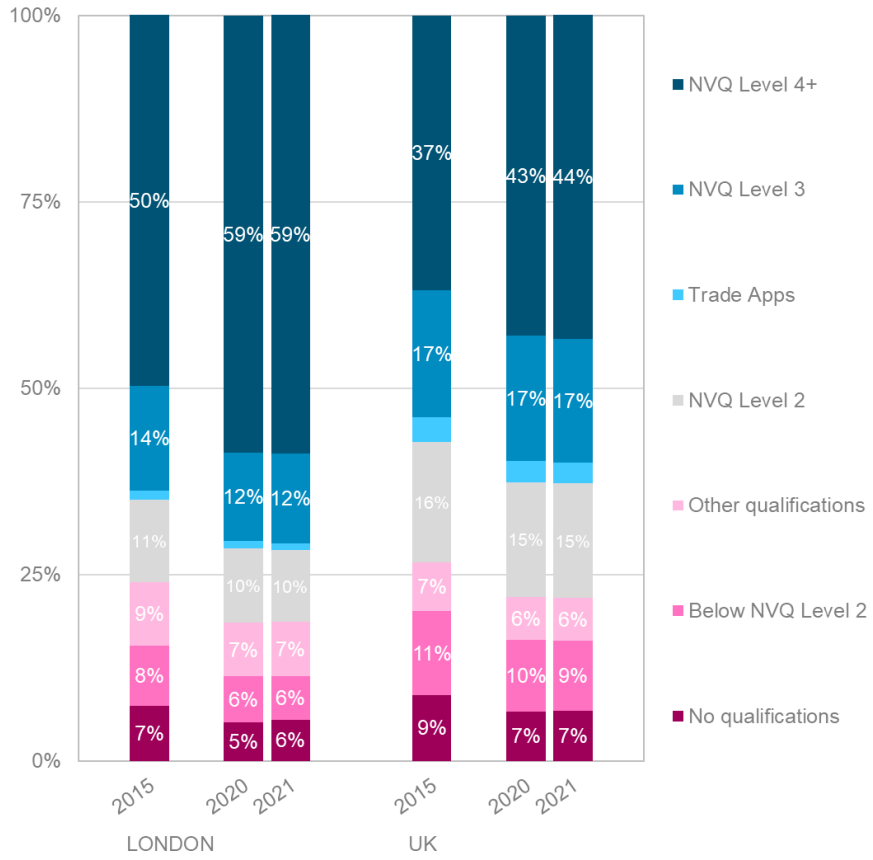
Source: ONS Labour Force Survey.
Chart: GLA Intelligence – see London Datastore.

In 2021, the proportion of young Londoners that were NEET was similar to the proportion in England as a whole, at about 12% on average across the four quarters.

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

Figure 16: Qualifications by level: London and UK

Level of highest qualification, % aged 16-64



Source: ONS Annual Population Survey. Note: Level 4 qualifications include a certificate of higher education, higher apprenticeship, level 4 diploma, etc. For more information see list of qualifications by level.

Compared to the UK average, London's resident population is relatively highly qualified. In 2021, around 59% of the population aged 16-64 were qualified to NVQ Level 4 and above compared to 44% nationally. The proportion of Londoners qualified to this level has been increasing in recent years, having been 50% in 2015. The share of Londoners qualified at lower NVQ levels is below the UK average.

6: COMMUNITIES

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

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

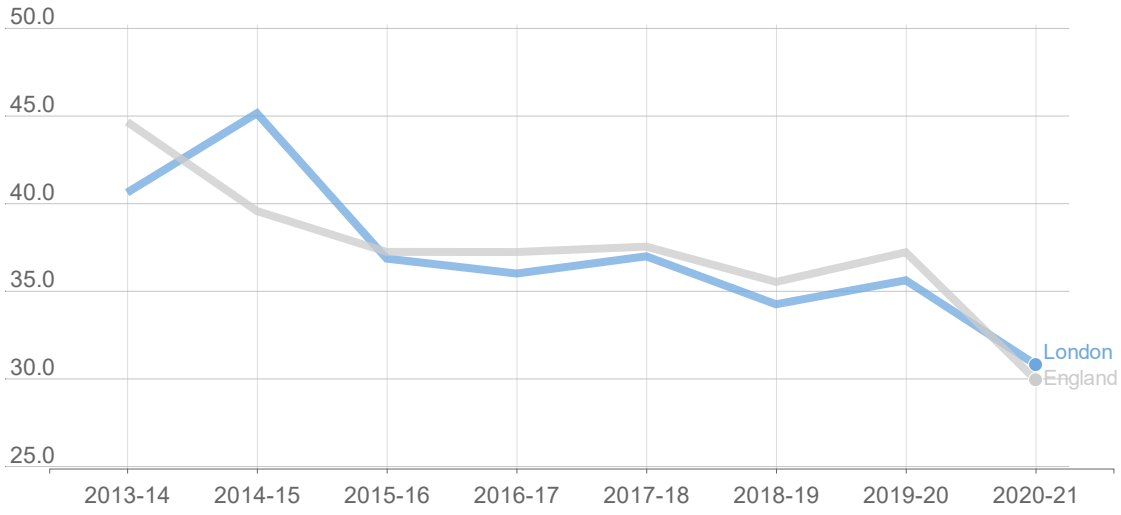
Much of the data is drawn from the Department for Digital, Culture, Media & Sport's (DCMS) Community Life Survey. This is a key source for understanding more about community engagement, volunteering and social cohesion throughout England. In the last two years, the GLA has published summaries of this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

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

Civic participation

Figure 1: Formal volunteering

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



Source: DCMS, Community Life Survey

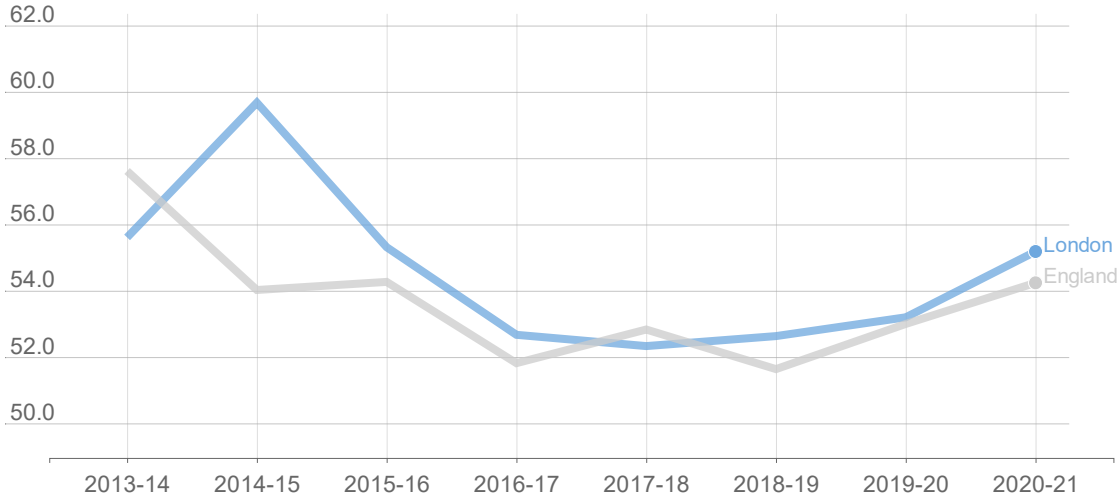
Around one third (31%) of Londoners aged 16+ formally volunteered in 2020-21. Formal volunteering refers to giving unpaid help through clubs or organisations.

Since 2013-14, the percentage of people reporting that they had formally volunteered in the last year decreased in London by 10 percentage points, a pattern mirrored across England.

Formal volunteering continued its downward trend during the pandemic, appearing to accelerate in 2020-21, possibly due to lockdown restrictions reducing opportunities for formal volunteering. In particular, a barrier to formal volunteering mentioned by some respondents was that they were limiting contact with others due to coronavirus.

Figure 2: Informal volunteering

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



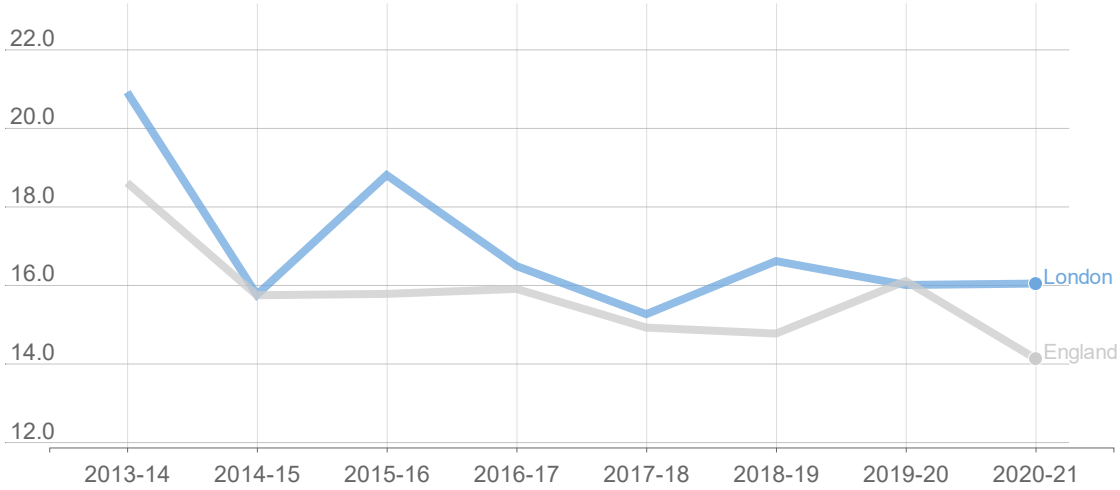
Source: DCMS, Community Life Survey

Over half (55%) of Londoners informally volunteered in 2020-21. Informal volunteering refers to giving unpaid help to individuals who are not a relative.

Since 2013-14, the percentage of people in London reporting that they had informally volunteered in the last year has not changed much year to year. With the onset of the pandemic, there was not a marked increase in volunteering rates with only a small non-statistically significant increase in informal volunteering in London.

Figure 3: Social action

Proportion who were personally involved in social action in the last year (%)



Source: DCMS, Community Life Survey

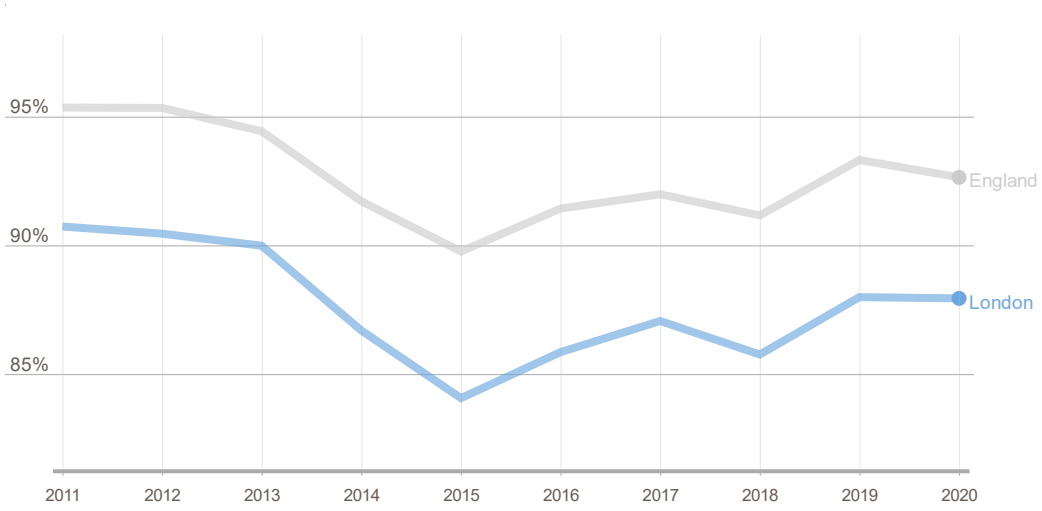
In 2020-21, around one in six (16%) Londoners were involved in social action. Social action is about being involved with issues affecting the local area, for example, setting up a new service/amenity, stopping the closure of a service/amenity, running a local service on a voluntary basis, helping to organise a street party or community event, etc.

Older Londoners aged 50-74 were more likely to have been involved in social action in 2020-21 (20%) compared with younger Londoners aged 16-34 (12%).

Democratic participation

Figure 4: Voter registration

Proportion of eligible adults aged 18 and over who are registered for local elections (%)



Source: Electoral Statistics for UK; Mid-Year Population Estimates

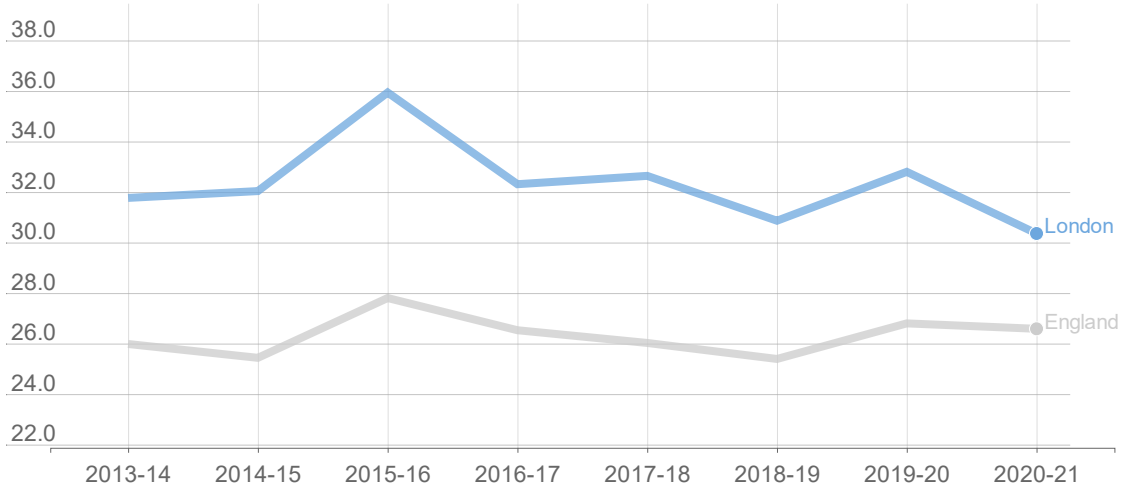
Voter registration is a key pillar of social integration. Not being registered to vote has other significant impacts aside from not being able to vote in elections, such as not being able to be selected for jury service, and more difficulty in gaining a credit rating.

The voter registration rate in London has remained high since 2011. Back then, 91% of eligible adults aged 18 and over were registered for local elections. However, by 2020, this was 88%. In other words, around one in eight Londoners (12%) were not registered to vote in 2020. The rate has been consistently lower in London than in England over the last 10 years, with London's rate being, on average, five percentage points lower.

It should be noted that the denominator used is all adults aged 18+ in London. This is slightly inaccurate as not all adults in London are eligible to vote, for example, non-UK, EU or Commonwealth nationals. This means the local election registration rate is slightly higher than presented here.

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 (30%) felt that they could personally influence decisions in their local area in 2020-21.

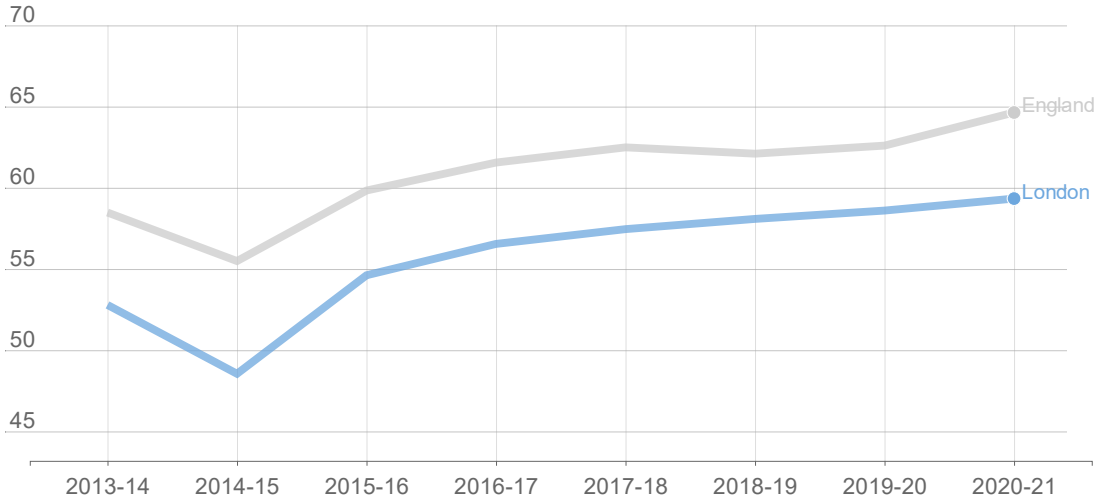
Since 2013-14, the percentage of people in London reporting that they could personally influence decisions in their local area has not changed much year to year.

In 2020-21, Black Londoners (44%) and Asian Londoners (40%) were more likely than White Londoners (26%) 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 (%)



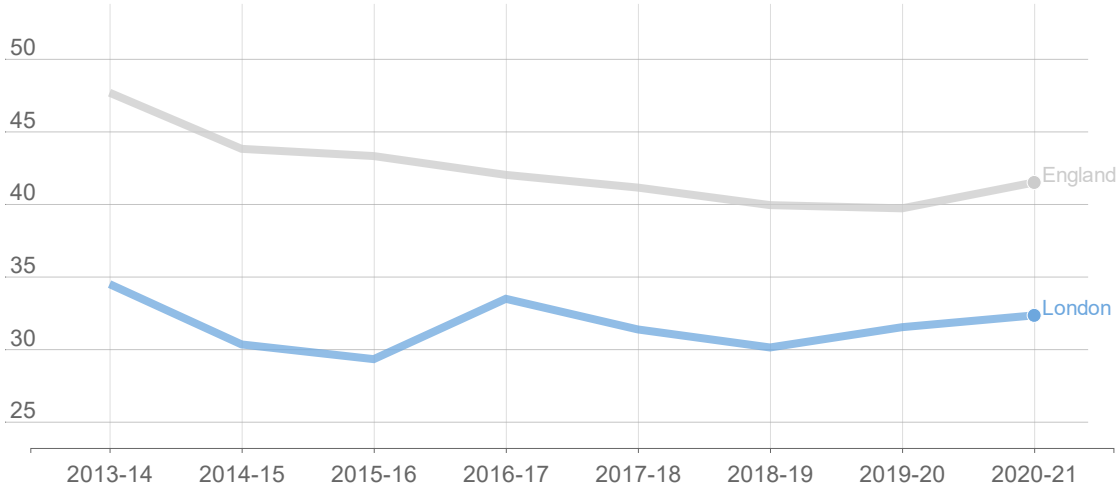
Source: DCMS, Community Life Survey

In 2020-21, 59% of Londoners felt that they belonged very strongly 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 of 49%.

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

Figure 7: Neighbourhood trust

Proportion who agree that many of the people can be trusted in their local neighbourhood (%)



Source: DCMS, Community Life Survey

In 2020-21, around one in three Londoners (32%) agreed that many of the people in their local neighbourhood could be trusted. Since 2013-14, the percentage agreeing has not changed much year to year.

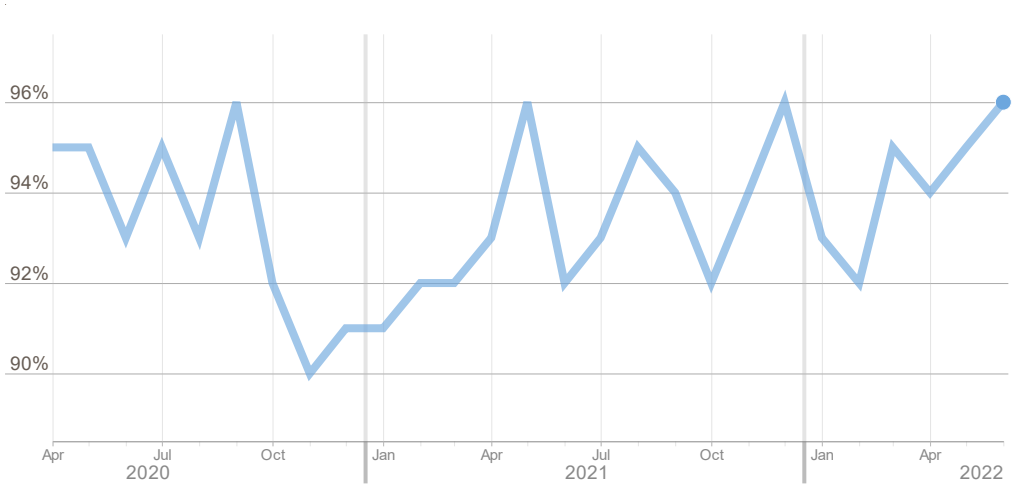
Trust within local neighbourhoods increases with age. In 2020-21, 19% of Londoners aged 16-24 agreed that many of the people in their local neighbourhood could be trusted. This was 27% among Londoners aged 25-34, 35% among Londoners aged 35-64 and 42% among Londoners aged 65+.

Trust was also lower among BAME Londoners (24%) compared with White Londoners (37%).

Social cohesion

Figure 8: Neighbourhood cohesion

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



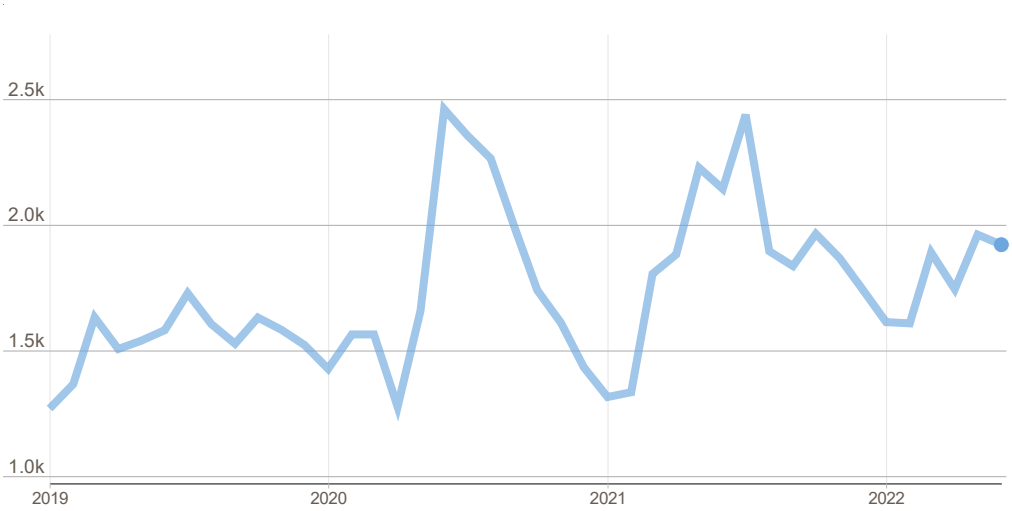
Source: MOPAC, Public Attitude Survey (PAS)

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 June 2022, 96% of Londoners agreed with the statement.

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

Figure 9: Recorded hate crime

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



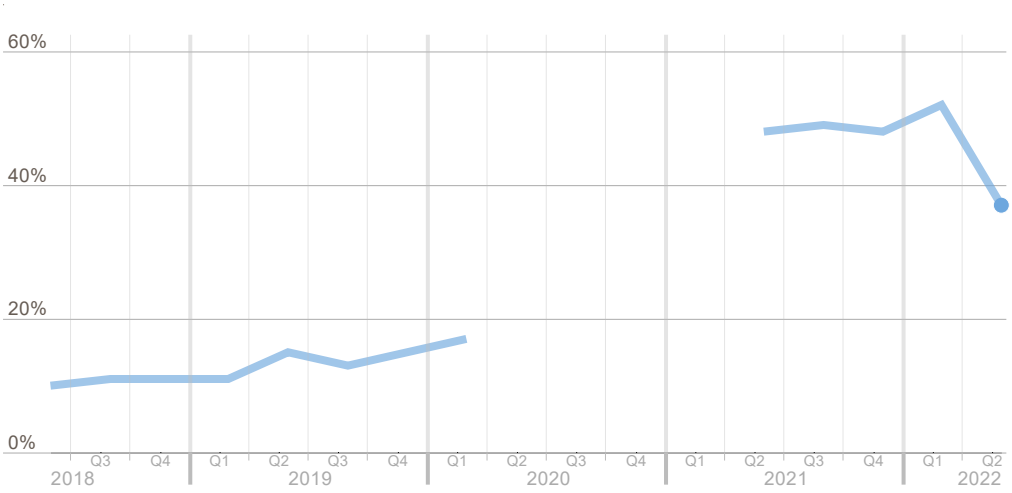
Source: Met Police, Hate Crime Dashboard

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

After the first national lockdown was imposed, recorded hate crime offences reached a peak of 2,500 offences in June 2020. It then fell to reach pre-pandemic levels by the end of the year, before rising to 2,400 offences in July 2021. It then fell back to 1,700 offences by the end of the year, but has again increased over the first half of 2022, to 1,900 in June 2022.

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

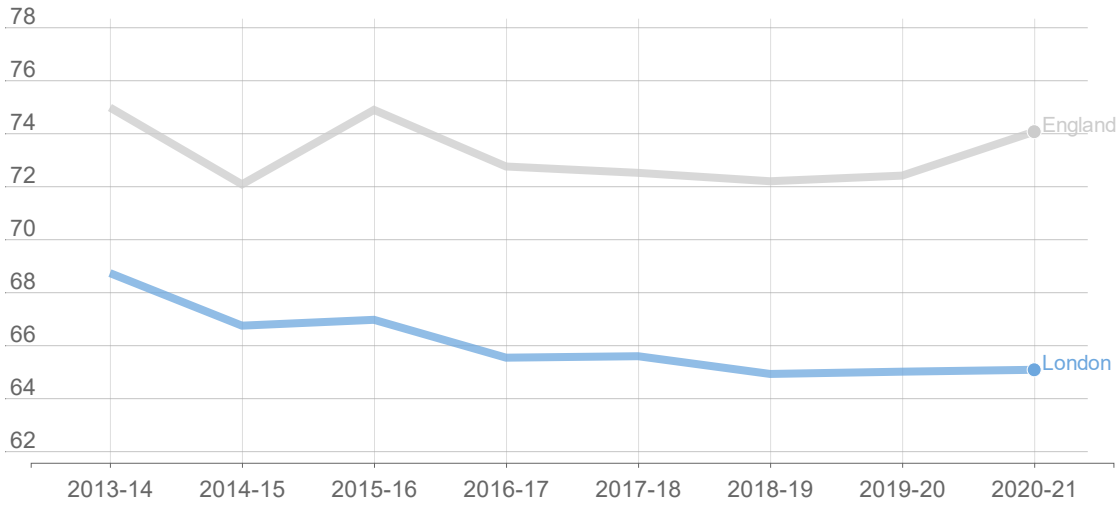
(PAS). In each quarter of 2018-19, around 10-11% of adults thought it to be a major or minor problem. In each quarter of 2019-20, around 13-17% of adults thought it to be a major or minor problem.

The PAS was traditionally conducted as a face-to-face survey. However, when the pandemic hit, the survey switched to a telephone methodology (in March 2020). As a result, caution should be exercised when looking at 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 in 2019-20 (52% in Q4 2021-22). The PAS began a phased return to face-to-face interviewing in Q1 2022-23, when 66% of interviews were face-to-face. This provides some explanation as to why the rate of concern fell to 37% in Q1 2022-23.

Relationships

Figure 11: Talking to neighbours

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



Source: DCMS, Community Life Survey

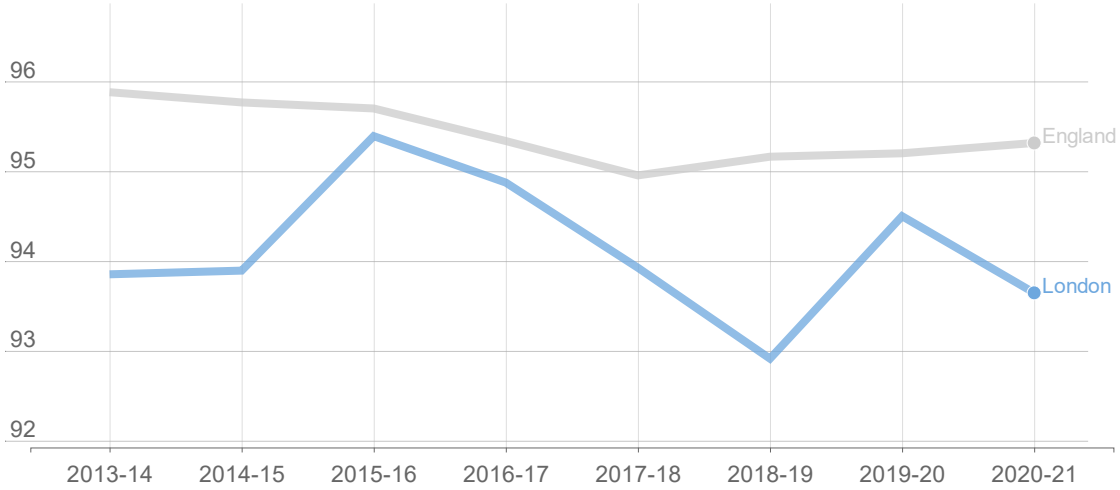
In 2020-21, around two thirds of Londoners (65%) reported chatting to their neighbours at least once a month. This is less than residents in all other regions of England (73-78%).

Talking to neighbours regularly was lower among younger Londoners aged 16-34 (47%) compared with older Londoners aged 35+ (75%).

Londoners who own their accommodation were more likely to have chatted to their neighbours often compared with Londoners who were renters (75% and 54% 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 2020-21, the majority of Londoners (94%) did agree that there were people who would be there for them if they needed help.

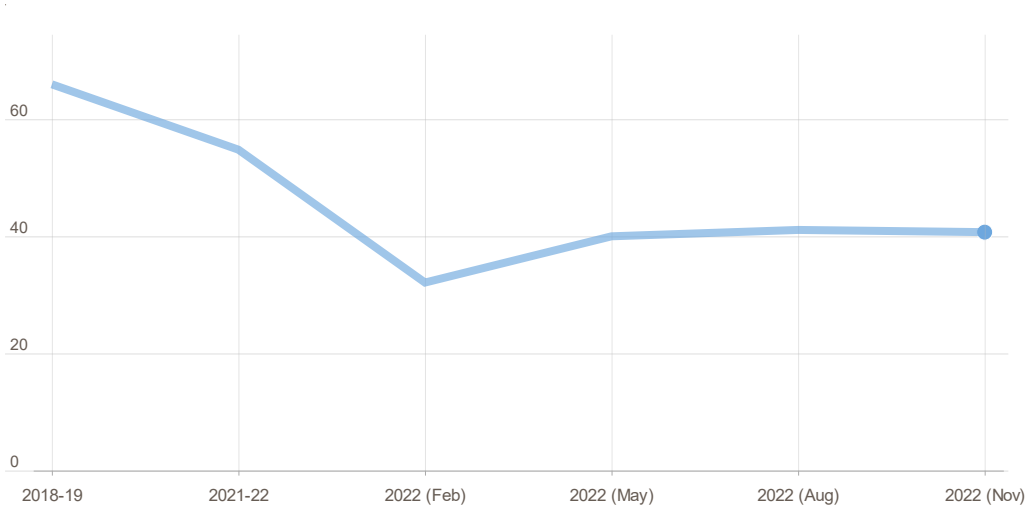
Londoners living in a couple were more likely to agree that there were people who would be there for them if they needed help compared with Londoners not living in a couple (96% and 91% respectively).

Londoners who own their accommodation were also more likely to agree that there were people who would be there for them if they needed help compared with Londoners who were renters (96% and 91% respectively).

Social participation

Figure 13: Participation in formal culture and events

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



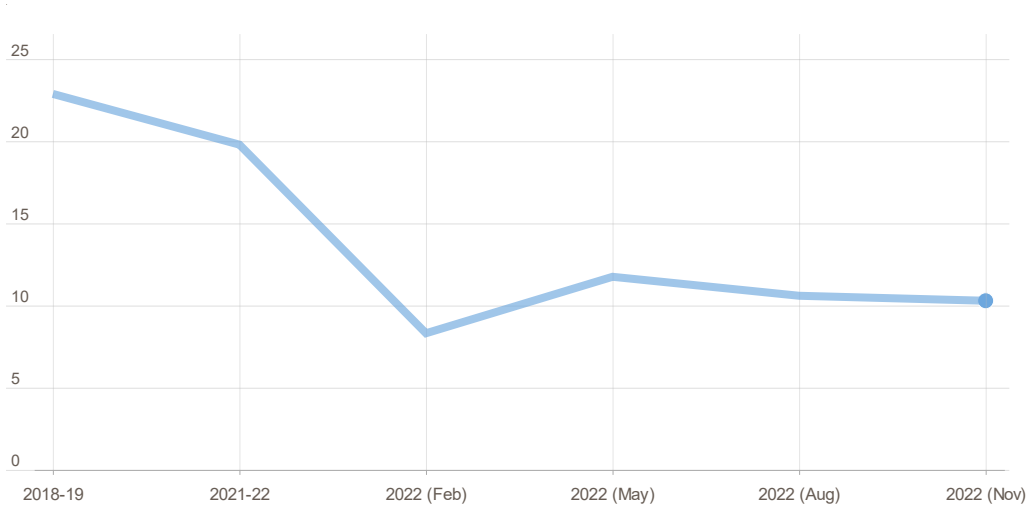
Source: Survey of Londoners 2018-19, Survey of Londoners 2021-22 and GLA/YouGov

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

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

Figure 14: Participation in sport

Proportion of Londoners who have participated in sport in the last month (%)



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

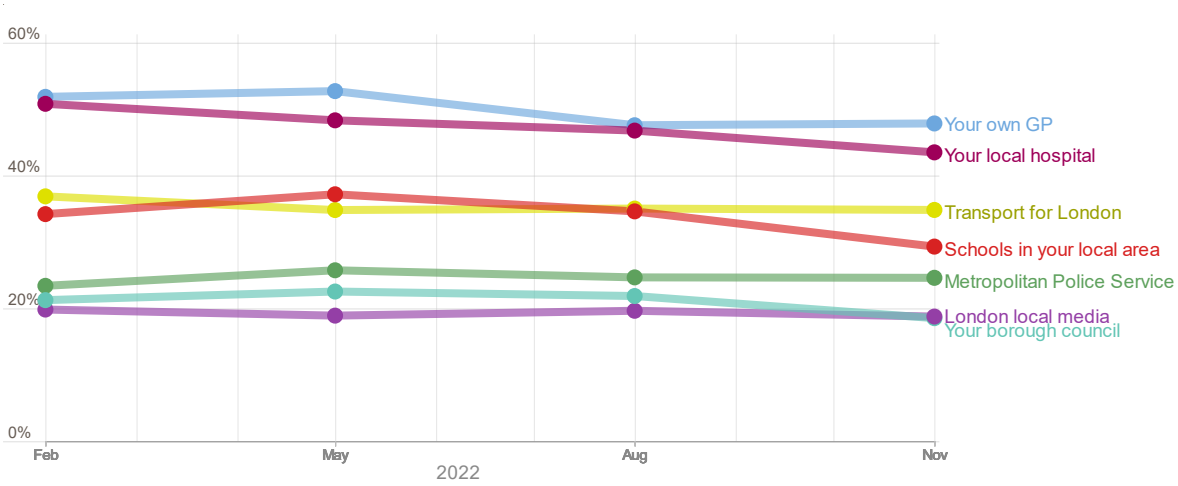
The Survey of Londoners also captured participation in sport. In 2018-19, around a quarter of Londoners aged 16+ (23%) had played sport in the previous month, but this had declined to 20% by the time of the 2021-22 survey. When polled in February 2022, 8% of Londoners had played sport in the last month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

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

Local institutions and amenities

Figure 15: Trust in institutions

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



Source: GLA/YouGov

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

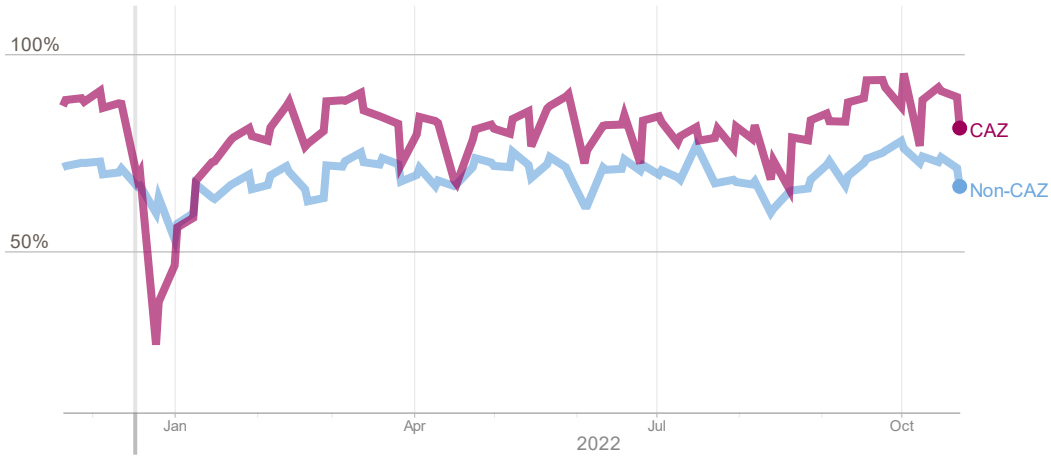
Londoners were most trusting of medical institutions; their own GP (52%) and their local hospital (51%) were most likely to be scored as trustworthy. However, trust in these institutions had declined since then to 48% and 44% respectively by November 2022. Trust in local schools had also declined by November 2022 with 29% deeming them as trustworthy compared with 34% in February 2022.

In February 2022, trust was lowest for London media, borough councils and the Metropolitan Police Service. This remained the case by November 2022 with trustworthiness standing at 19%, 19% and 25% respectively.

The public perception of trust in the Metropolitan Police Service (MPS) is also routinely measured by the Public Attitude Survey (PAS). The results of this survey have shown a gradual downward trend over the last two years; the latest data for Q2 2022-23 has the proportion of respondents agreeing that the MPS is an organisation that they can trust at 71%. This compares to 80% in Q2 2020-21. As well as methodological differences, the question used in the PAS is very different to the question in the GLA's polling, so the two measures cannot be compared directly.

Figure 16: Thriving local high streets

Proportion of 2019 footfall in local high streets in the CAZ and outside of the CAZ, using weekend visitors at 12pm (%)



Source: Anonymised and Aggregated data by O2

Creating thriving, inclusive and resilient high streets and town centres, within easy reach of all Londoners is one of the key missions of the London Recovery Board. The chart above shows whether footfall in high streets in the CAZ and outside of the CAZ in London have recovered to the levels of a pre-Covid benchmark (1-14 July 2019). It looks specifically at visitor footfall on high streets in London using mobile phone data from O2. The data is based on 30% of the UK's population (O2 customers) multiplied up to the full population.

Footfall (as defined above) has consistently been higher in the CAZ compared with outside of the CAZ but has still not recovered to the level seen in 2019. Footfall decreased sharply over Christmas 2021, and more so in the CAZ, probably due to the Omicron variant, but began to pick up very soon after. In the first half of 2022 up to and including June, footfall averaged 79% of pre-Covid-19 levels in the CAZ and 69% of pre-Covid levels outside of the CAZ. Footfall increased slightly in the second half of 2022, from July to October, with footfall averaging 83% of pre-Covid-19 levels in the CAZ and 70% of pre-Covid levels outside of the CAZ.

7: CRIME & SAFETY

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

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

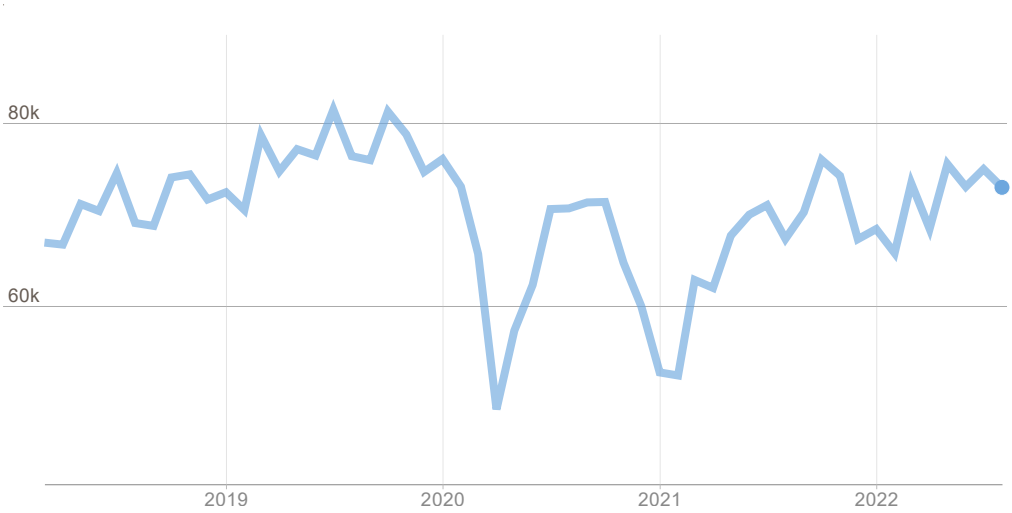
The indicators are all presented at the London-level and are primarily derived from publicly available dashboards, including the Public Voice MOPAC (Mayor's Office for Policing And Crime) Dashboard, the NFIB (National Fraud Intelligence Bureau) Fraud and Cyber Crime Dashboard, and the MPS (Metropolitan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

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

Total Crime

Figure 1: Total Notifiable Offences (TNOs)

Number of offences recorded by the MPS



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

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

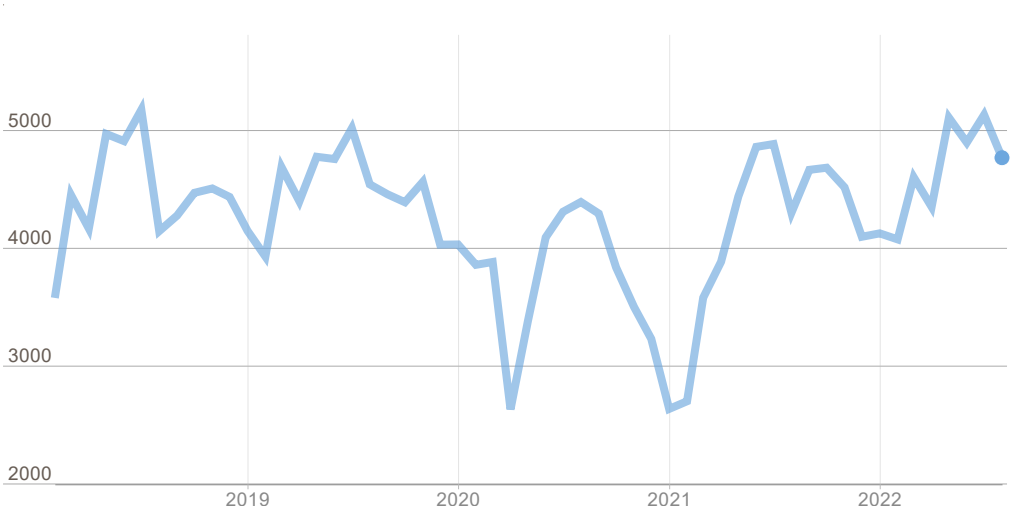
in the level of total crime[14] recorded during these periods, although differential impacts were observed across the individual crime types.

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

Violence

Figure 2: Non-Domestic Violence with Injury Offences

Number of offences recorded by the MPS



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

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

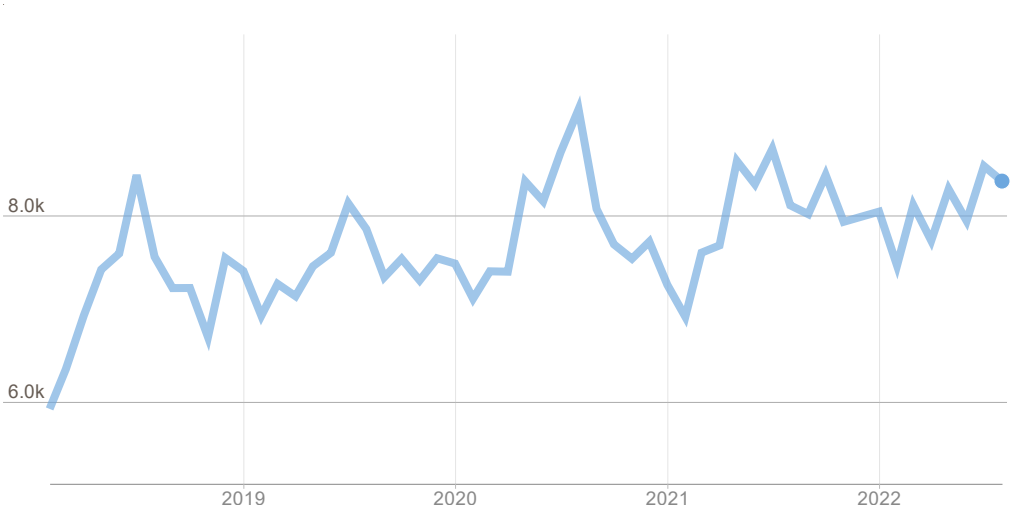
In the succeeding months, notable variation was observed in the volumes of offending, with the active lockdown periods aligned to steep reductions in offending and the conclusion of the lockdown periods aligned to steep increases in offending.

During 2021, an upward trend was observed with offending aligning back to its pre-pandemic levels. This was maintained throughout 2022, with the most recent in August 2022 recording a 5% increase on August 2019.

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

Figure 3: Domestic Abuse Offences

Number of offences recorded by the MPS



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

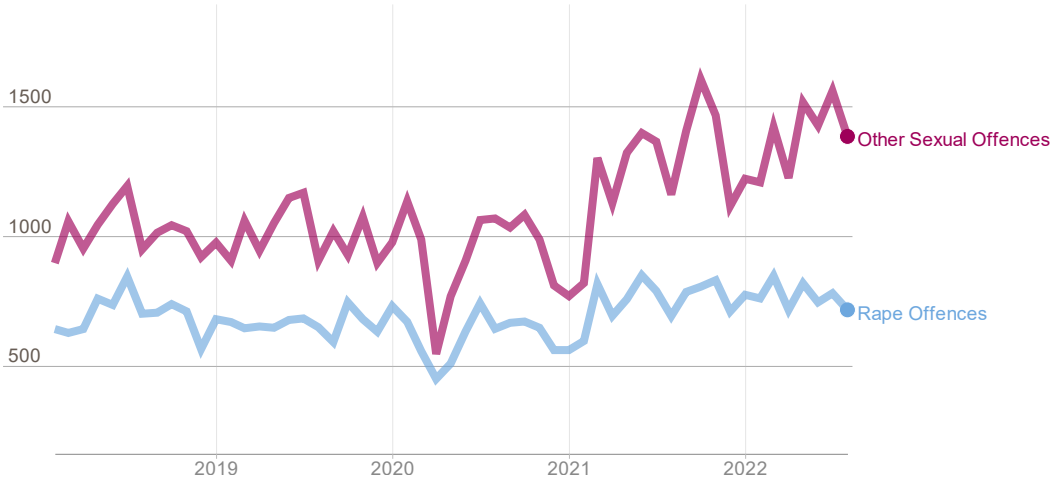
Since 2018, there has been a general upward trend in the level of Domestic Abuse offences recorded by the police. The most recent year to date had 8% more offences than in the same period in 2019 (January to August).

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

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

Figure 4: Sexual Offences

Number of offences recorded by the MPS



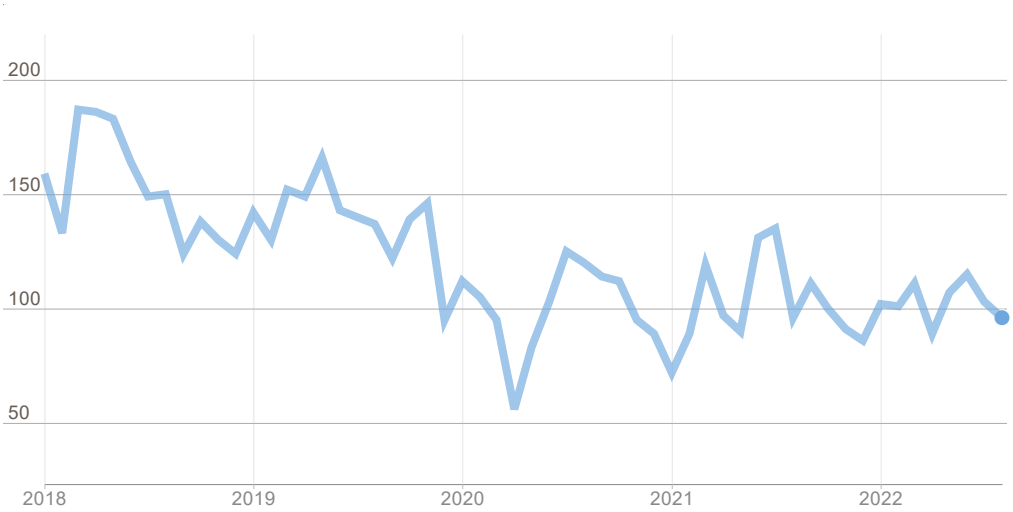
Source: MOPAC Domestic and Sexual Offences Dashboard. The chart distinguishes between Rape Offences and Other Sexual Offences, which when combined are referred collectively as "Sexual Offences."

At the start of the pandemic, sharp decreases were shown in the monthly levels of Rape and Other Sexual Offences. However, offending levels quickly returned to "normal" by June 2020, before elevating significantly from March 2021. A later peak was shown in October 2021, with this month recording the highest number of Other Sexual offences on record.

While sexual offending levels have remained high throughout 2022, this has been more noticeable for the Other Sexual Offences category.

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

Number of offences recorded by the MPS



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

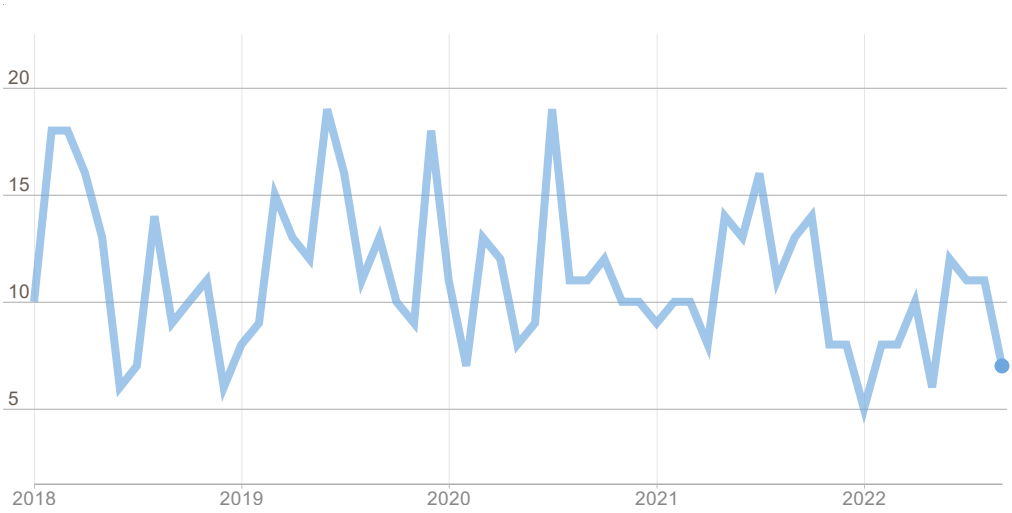
There has been a downward trend in the recorded number of non-domestic knife crime victims under the age of 25 since May 2018.

The start of the pandemic documented a very pronounced drop in offending in April 2020 before a further reduction was shown in January 2021.

To date, the volume of offending in 2022 has remained lower and more stable than the offending shown prior to the pandemic.

Figure 6: Homicide Offences

Number of offences recorded by the MPS



Source: MPS (Metropolitan Police Service) Crime Data Dashboard

Since the beginning of 2018, notable variation was shown in the monthly number of Homicides, ranging from four Homicides in January 2022 up to 19 Homicides in both June 2019 and July 2020.

During the current calendar year, while the Homicide offending recorded the same seasonal trends, the levels shown are lower than previous years.

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

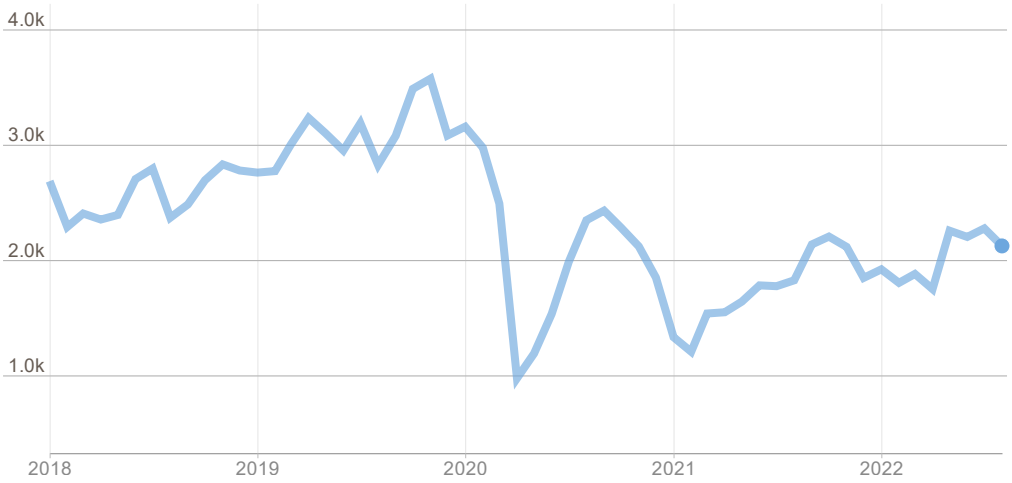
Males continue to consistently be over-represented as Homicide victims (78% of all victims in 2021).

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

Acquisitive Crime

Figure 7: Personal Robbery

Number of offences recorded by the MPS



Source: MOPAC Crime Dashboard.

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

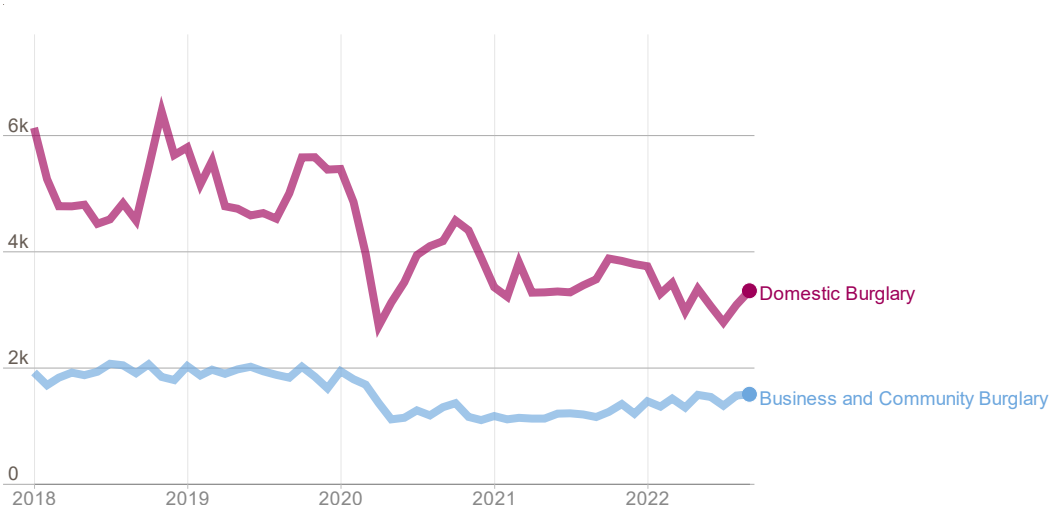
After the significant drop in Personal Robbery offending at the onset of the pandemic, there was a period of instability, with a series of noticeable increases and decreases shown.

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

The upward trend in Personal Robbery offending shown in 2021 has continued through 2022, although the monthly level of offending remains significantly lower than that shown before the pandemic.

Figure 8: Burglary Offences

Number of offences recorded by the MPS



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

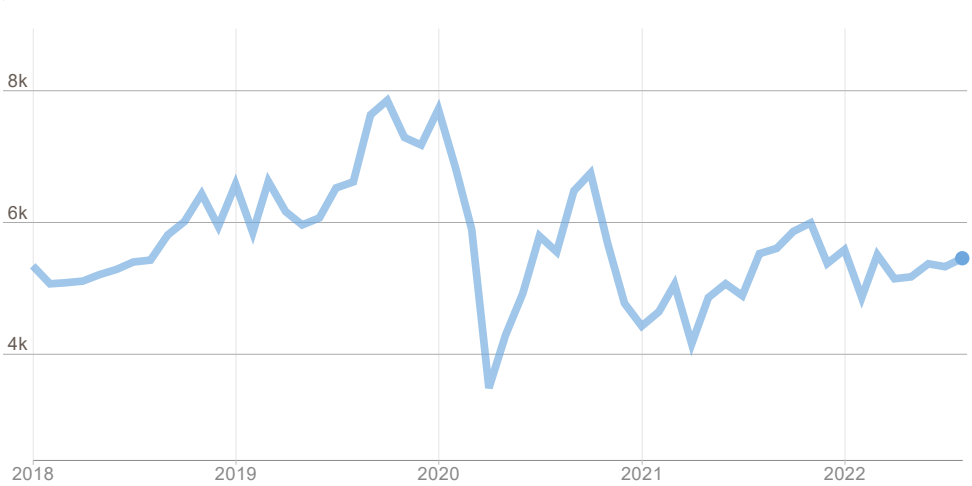
Prior to the outset of the pandemic, both Domestic and Business and Community Burglary offending levels were stable, with the monthly offence totals rarely deviating from the mean.

However, in April 2020, overall Burglary offending reduced significantly, with a 45% reduction in Domestic Burglaries and a 34% reduction in Business and Community Burglaries compared to the offending levels in April 2018 and April 2019.

Following this dip in offending, the overall monthly Burglary levels have remained noticeably lower than pre-pandemic levels. However, there are some indications of a gradual increase in Business and Community Burglary, with an upward trend in offending observed since March 2021.

Figure 9: Theft from Motor Vehicle Offences

Number of offences recorded by the MPS



Source: MOPAC Crime Dashboard.

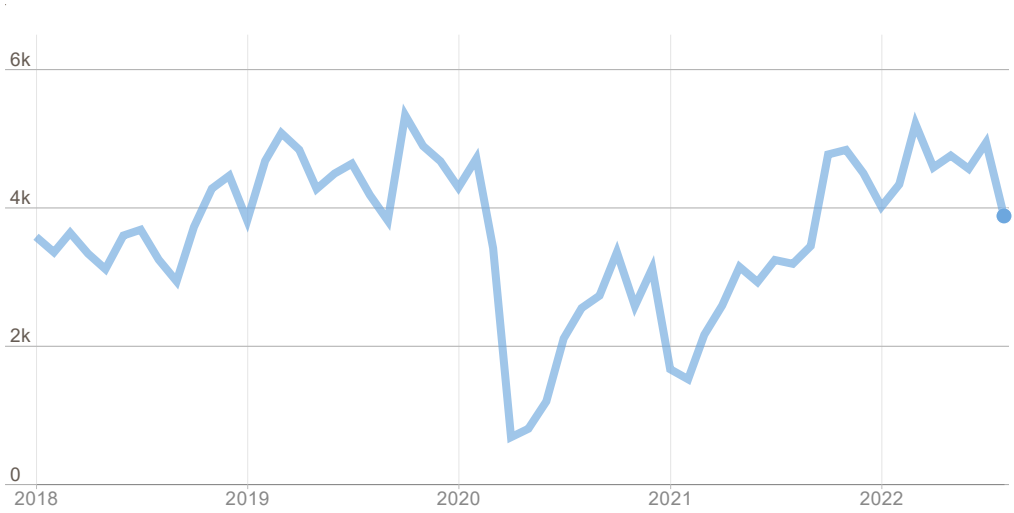
Following noticeable spikes in the volume of Theft from Motor Vehicle offending in both October 2019 and January 2020, a very sharp drop in offending occurred just after the second national lockdown in April 2020.

The level of offending then increased through to October 2020, before a series of unsettled fluctuations were shown through until the end of 2021.

In 2022, the monthly offending levels have remained relatively stable, observing a gradual upward trend. However, offending levels remain below the levels shown prior the pandemic; with August 2022 recording 18% less offences than August 2019.

Figure 10: Theft from Person Offences

Number of offences recorded by the MPS



Source: MOPAC Crime Dashboard.

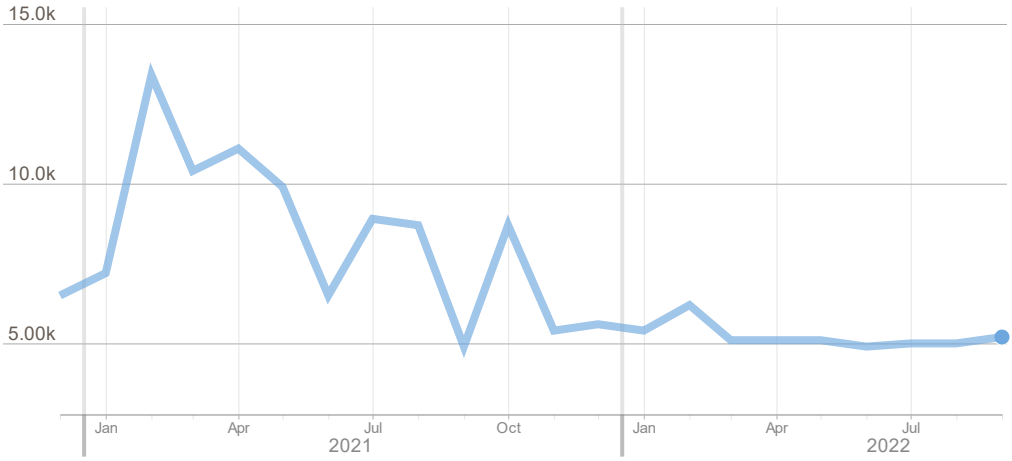
An upward trend in Theft from Person offending was shown throughout both 2018 and 2019, before a noticeable reduction was observed in April 2020 (an 80% reduction from the offence level recorded in March 2020).

Following this significant drop in offending, the monthly offence levels have gradually increased, except in January and February 2021, when a temporary dip in offending was shown.

Since May 2021, continuing to date, the monthly volume of Theft from Person offences has been back in alignment with the pre-pandemic levels of offending.

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. For note: data is only provided on the dashboard for the most recent 13-month period, hence the limited timeseries presented on the chart.

A significant increase in fraud and cyber-crime offences was shown in February 2021 compared to the preceding two months. However, from this point on, a steady downward trend in offending levels was observed, followed by a period of stability since March 2022.

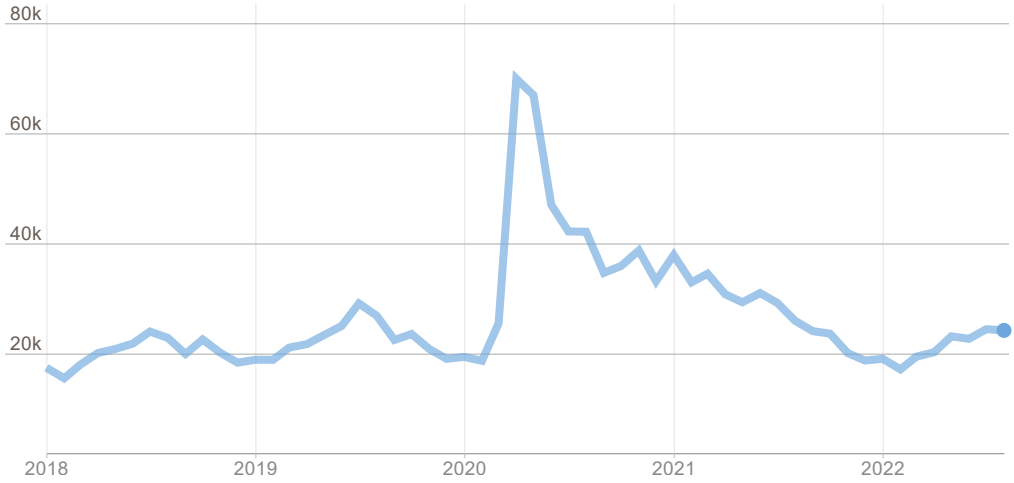
Of the 71,720 reports recorded in the most recent 13-month period, 92% related to fraud (65,970 reports) and the remaining 8% related to cyber-crime (5,750 reports). Collectively, these incidents resulted in a total reported loss of £1.7 billion.

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

Safety

Figure 12: Anti-Social Behaviour

Number of calls received by the MPS



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

While the total Anti-Social Behaviour (ASB) calls received by the MPS are a combination of Personal ASB, Nuisance ASB and Environmental ASB[15], the vast majority relate to Nuisance ASB (90%).

The onset of the pandemic brought a significant increase in ASB calls, with March 2020 documenting a 36% increase from the number of calls recorded in February, April documenting a 279% increase, and May documenting a 258% increase.

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

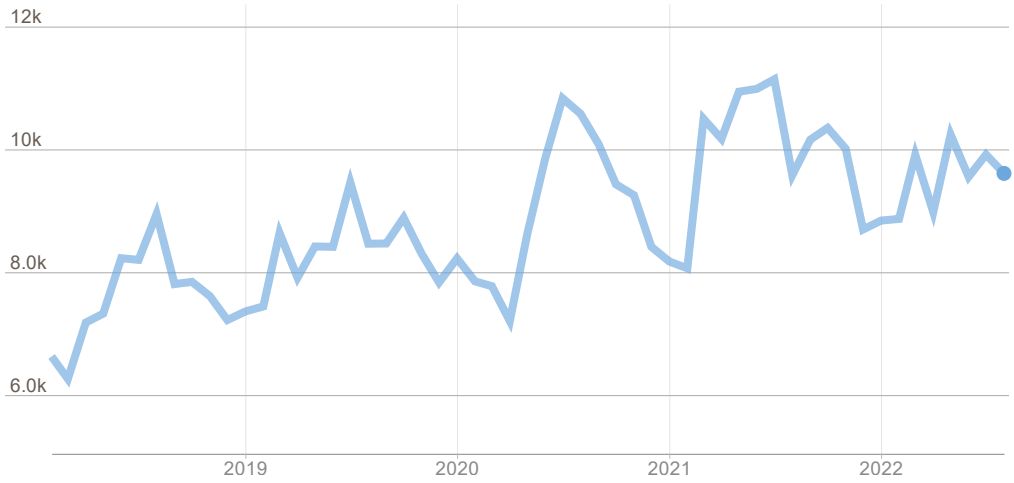
Following this, while the number of ASB calls began to reduce back down towards pre-pandemic levels, the overall number of ASB calls remained slightly raised through most of 2021, before returning to normal levels in November.

In 2022, the number of ASB calls has observed a seasonal upward trend at a similar level to that seen in 2019.

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

Figure 13: Harassment

Number of offences recorded by the MPS



Source: MOPAC Crime Dashboard.

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

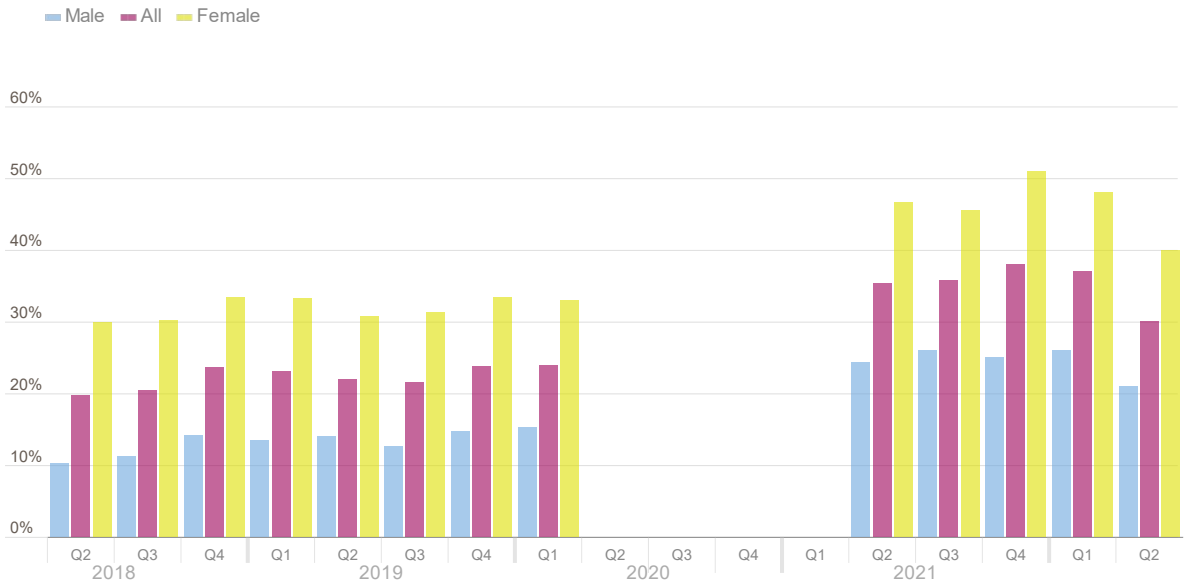
Currently overall offending continues to remain elevated above the levels seen pre-pandemic, with August 2022 recording a 14% increase on August 2019.

While a substantial proportion of the increase in Harassment offending can be explained by amendments in the Home Office counting rules for Stalking offences[16] combined with an increase in police officer awareness, there does appear to be an *actual* increase in the number of offences being reported.

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

Figure 14: Feeling of Safety after Dark

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



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

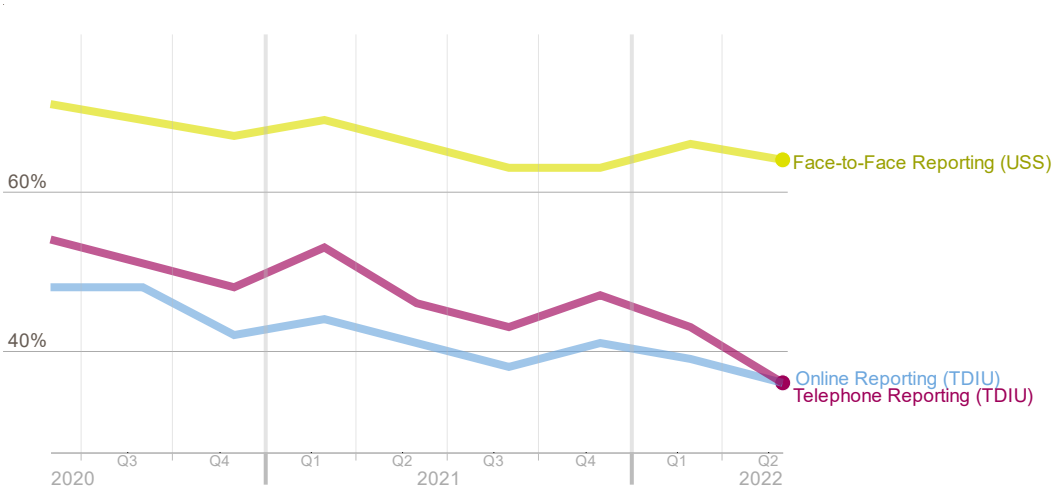
A greater proportion of female respondents feel unsafe walking alone in their local area after dark than male respondents.

Prior to the pandemic, this was around a third of female respondents against one in eight male respondents.

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

Figure 15: Satisfaction Level of Reporting Victims (MPS)

Percentage of survey participants (USS/TDIU)



Source: MOPAC Public Voice Dashboard. Data sourced from the User Satisfaction Survey and the Online Victim Satisfaction Survey for Q3 21-22. The demographic comparisons are based on the R12 period to Q3 2021-22. The chart shows victim satisfaction levels by three difference crime reporting methods (face-to-face, online reporting and telephone reporting).

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

This level of satisfaction is significantly higher for victims reporting crimes face-to-face (64%) than for victims using other reporting methods.

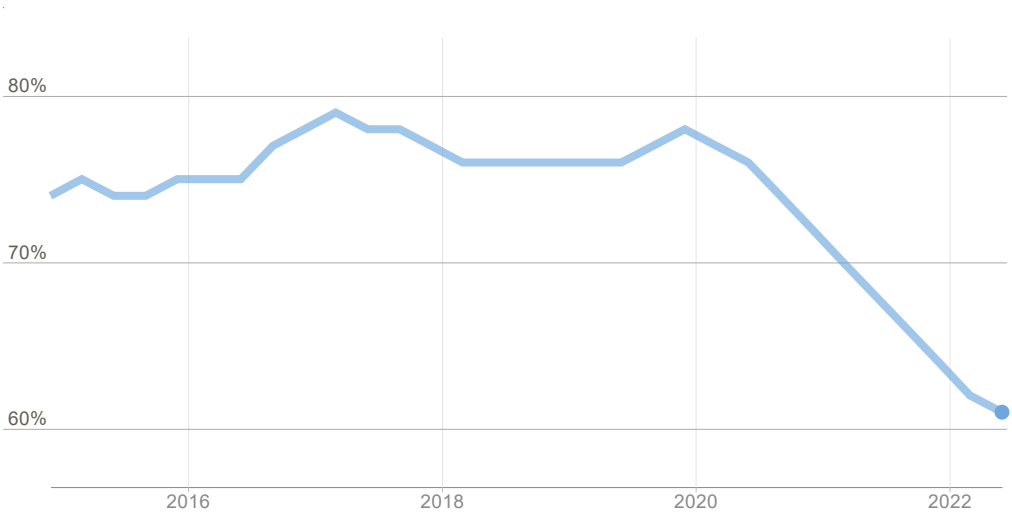
The divergence between reporting method satisfaction levels is widening. Victim satisfaction for face-to-face reporting has been steadily increasing since Q3 2021-22, while victim satisfaction for both telephone and online reporting has continued to decline.

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

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

Figure 16: Fair Treatment by the Metropolitan Police Service

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



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

Since June 2020, the percentage of survey respondents who agreed that the police treat everyone fairly, regardless of who they are, documented a sharp decline. In June 2022, 61% of the respondents agreed with this sentiment, down from three-quarters of the respondents agreeing in June 2020 (76%).

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

Young people had the lowest level of agreement that the police indiscriminately treat everyone fairly.

Respondents of Black (48%) and Mixed (41%) ethnicities had a lower agreement level than respondents from other ethnic groups.

The proportion of LGBT+ respondents who agreed with the measure statement was significantly lower than the proportion of non-LGBT+ respondents (48% versus 62%).

8: THE ENVIRONMENT

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

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

Greenhouse Gas Emissions

The London Energy and Greenhouse Gas Inventory reports yearly GHG emissions in London by source.[17,18] The most recent available data for London are from 2019. Due to a change in methodology, 2020 data will be published in 2023.

In 2019, London's CO_2e emissions were the equivalent of 31.5 megatons of CO_2 ($MtCO_2e$) across the five emission sectors: domestic buildings, industrial and commercial buildings, transport, waste, industrial processes and product use, and agriculture, forestry and other land use. Emissions from domestic and industrial and commercial buildings were responsible for 64% of total emissions in London, followed by transport (28%) and other sources (8%).

Overall, emissions in London in 2019 went down from 32.8 million tonnes in 2018, equating to a 3.9% cent decrease. London's trend of reducing emissions can be seen in Figure 1. The 2019 emissions represent a 31% reduction on 1990 levels and a 38% reduction compared to 2000, despite a significant increase in population of nearly 32% and 29%, respectively.

London's per capita emissions have reduced by 48%, from 6.7 $MtCO_2e$ per capita in 1990 to 3.5 MtCO2e per capita in 2019. Compared to the rest of the UK, London has the lowest CO_2 per capita emissions of any region due to our extensive public

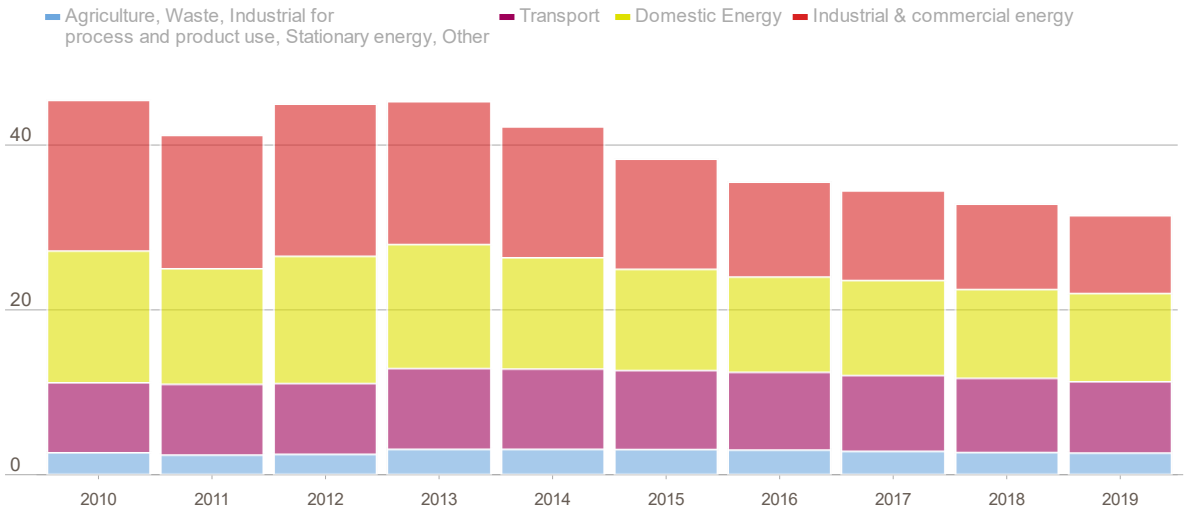
[17] For ease of reporting, the different GHG emission levels are converted into the CO2 emissions levels that have an equivalent potential of global warming. The measurement unit is hence named tonnes of CO2 equivalent, or tCO2e – see HM Government, Environmental Reporting Guidelines.

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

transport system, a high population density and its lower level of large industrial facilities than in other regions.

Figure 1: Greenhouse Gas emissions in London

Megatons of CO_2 equivalent



Source: GLA, LEGGI, 2019

The National Atmospheric Emissions Inventory's (NAEI) Local Authority CO2 interactive map is an alternative source of data on the concentration of CO2 emissions in the UK by Local Authorities. While the NAEI includes the latest available data on CO_2 emissions in London, LEGGI was considered the best source of data for the GHG emissions indicator (Figure 1) data as it reports on all GHG emissions rather than just CO_2, it updates yearly, and is available by sector and borough.

Air Quality

Nitrogen Dioxide (NO_2) is a gas resulting from combustion (vehicles, heating, etc.) that can be toxic if inhaled in high doses for a sufficiently long time and contributes to respiratory and cardiovascular health issues. The annual legal UK limit is set at an average concentration of 40 µg/m^3 over a year, whereas the World Health Organisation (WHO) guideline is of 10 µg/m^3.[19]

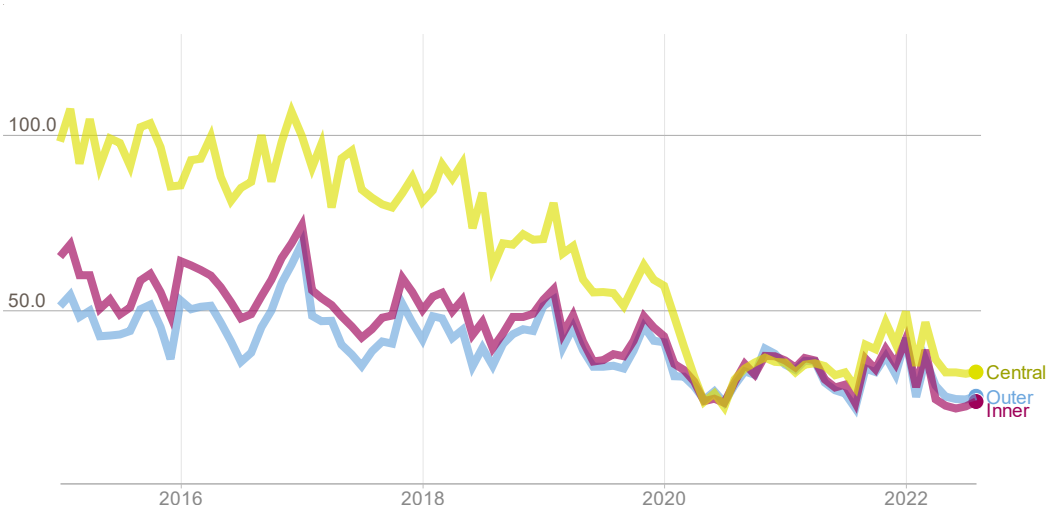
Figures 2-7 show the monthly average concentrations for all regulatory air quality monitoring stations in London averaged by location – central (within the congestion charge zone), inner (within the Ultra Low Emission Zone), outer, and also by site type – roadside and background. Roadside sites are those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

[19] For the legal and recommended limits, see The Air Quality Standards Regulations 2010, Schedule 2 and the WHO global air quality guidelines 2021, Section 3 respectively. Note also the London Atmospheric Emissions Inventory 2019 provides detailed mapping of air pollutants in London, however this has not been reviewed here as it does not include frequently-updated data.

from sources and therefore broadly representative of city-wide background conditions.

Figure 2: Nitrogen Dioxide concentration at the roadside

Micrograms per cubic meter (µg/m^3)



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

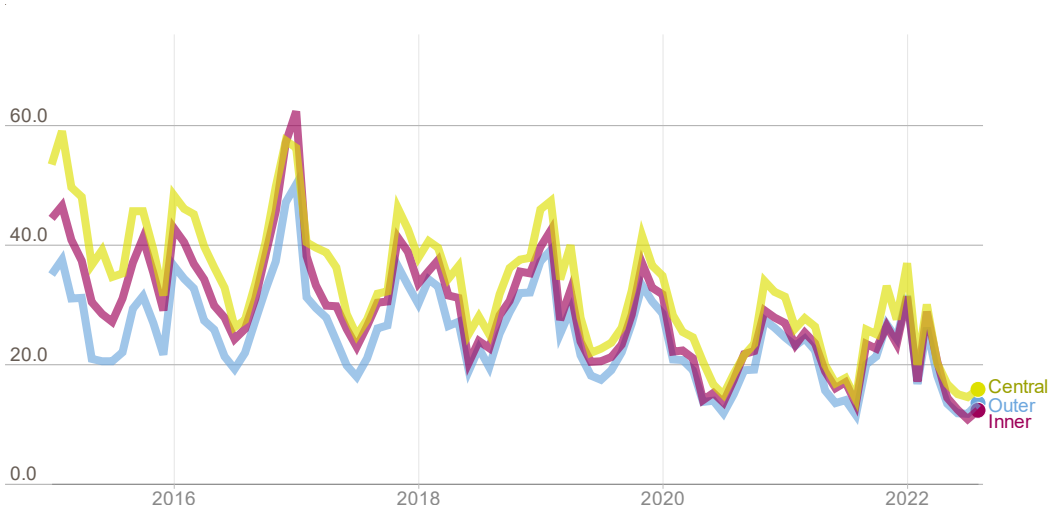
Figure 2 shows that NO_2 concentration across Central, Inner, and Outer roadside areas have followed a downward trend since 2017, although concentrations in central London have fallen more rapidly than elsewhere, a reduction of 54% since 2017[20]. This is due to the combined impact of air quality policies such as the Ultra Low Emission Zone (ULEZ) and the traffic reductions seen in central London due to the COVID-19 pandemic.

During the COVID-19 pandemic and until mid-2021, concentrations of NO_2 were at similar levels across the whole of London. Since then, NO_2 concentrations in central London have increased though remain much lower than pre-pandemic levels.

[20] https://www.london.gov.uk/sites/default/files/expanded_ultra_low_emission_zone_six_month_report.pdf

Figure 3: Nitrogen Dioxide concentrations in the urban background

Micrograms per cubic meter (µg/m^3)



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

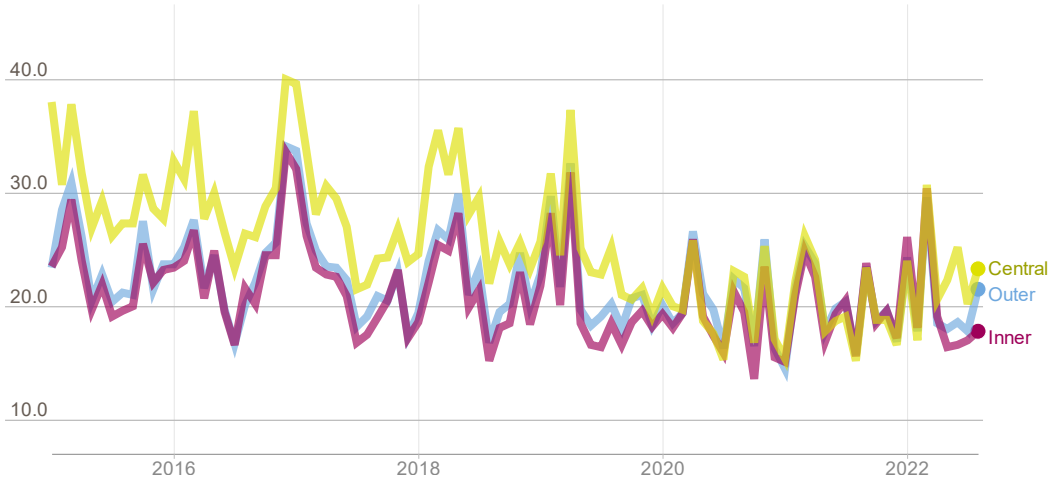
Urban background NO_2 concentrations are generally lower than roadside concentration and have remained mostly below the legal limits since 2017. Figure 3 also shows the typical seasonal variation seen in NO_2 concentrations with highs in the winter and lower levels in the summer months.

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

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

Figure 4: PM_{10} particulate concentration at the roadside

Micrograms per cubic meter (µg/m³)



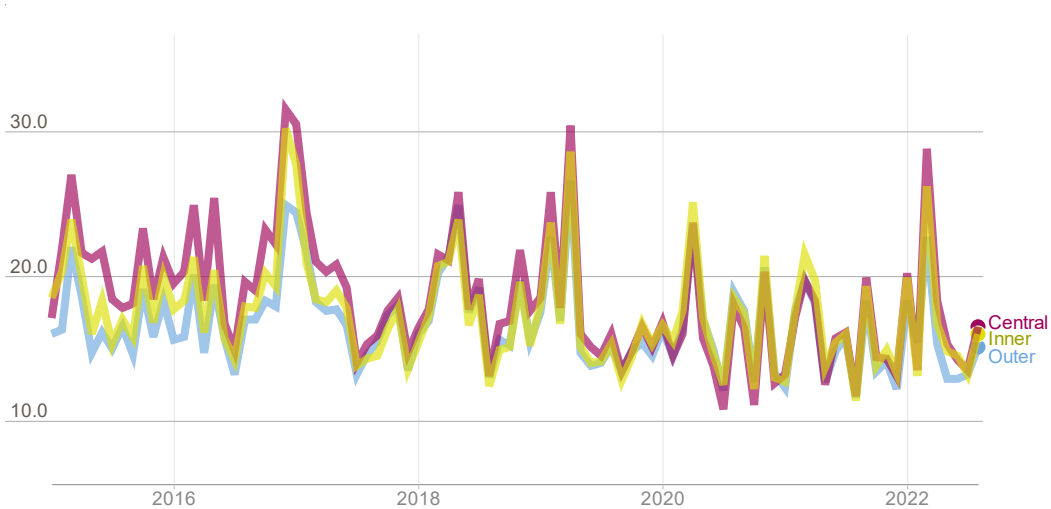
Source: London Air and Air Quality England. See up-to-date data on the Resilience Dashboard.

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

Across all of London, PM_{10} levels have remained below the legal limit of 40 µg/m³ for over seven years. PM_{10} levels have also followed a persistent downward trend, although they are still exceeding the WHO recommended guideline of 15 µg/m³. Since 2020 the average concentrations for each zone have converged and remained at a similar level.

Figure 5: PM_{10} particulate concentration in the urban background

Micrograms per cubic meter (µg/m³)



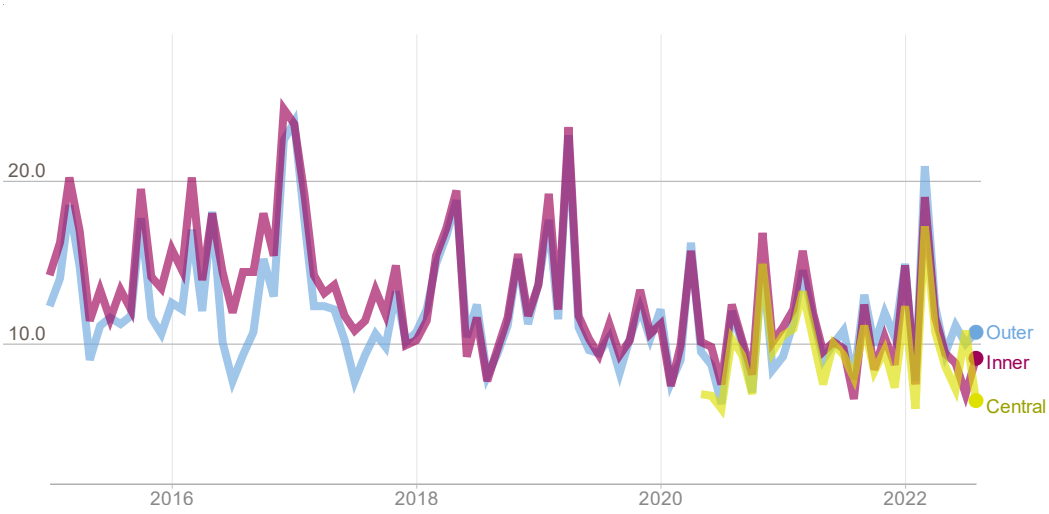
Source: London Air and Air Quality England. See up-to-date data on the Resilience Dashboard.

Consistent with measurements for NO_2, PM_{10} levels in the urban background are generally lower than those on the roadside. This is due to road transport being the biggest emissions source for both.

Figure 5 shows a decreasing trend in PM_{10} concentrations, though not as pronounced as for NO_2. PM_{10} concentrations have been similar in all three areas of London since 2018.

Figure 6: PM2.5 concentration at the roadside

Micrograms per cubic meter (µg/m^3)



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

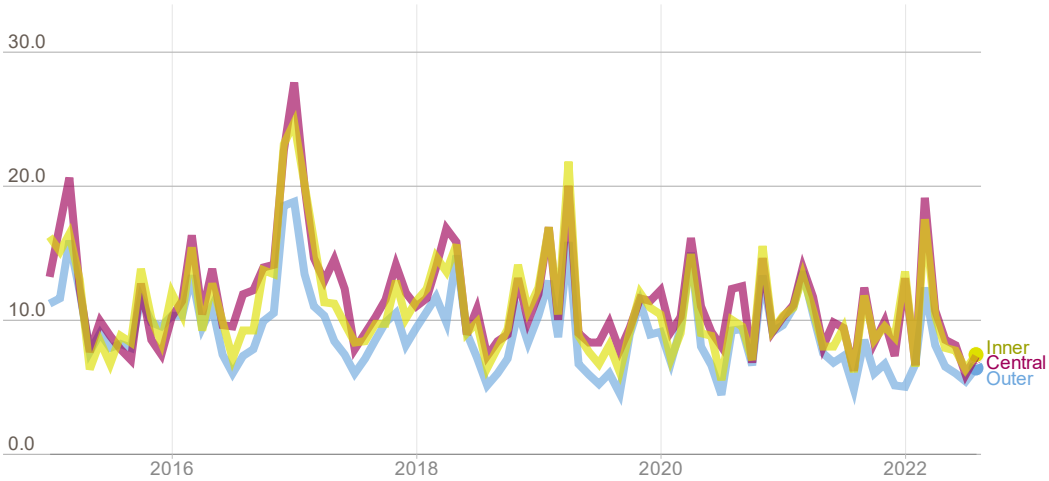
$PM_{2.5}$ levels have remained below the legal limit of 25 µg/m^3 for over seven years, albeit above the WHO guideline level of 5 µg/m^3.

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

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

Figure 7: PM2.5 concentrations in the urban background

Micrograms per cubic meter (µg/m^3)



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

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

As with measurements for NO_2 and PM_{10}, levels of $PM_{2.5}$ in the urban background are generally lower than those on the roadside, albeit marginally in this case. On some occasions, $PM_{2.5}$ levels in the urban background have even surpassed those on the roadside. This is due to $PM_{2.5}$ being heavily influenced by sources outside of London and meteorological conditions

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

Readers may also want to refer to:

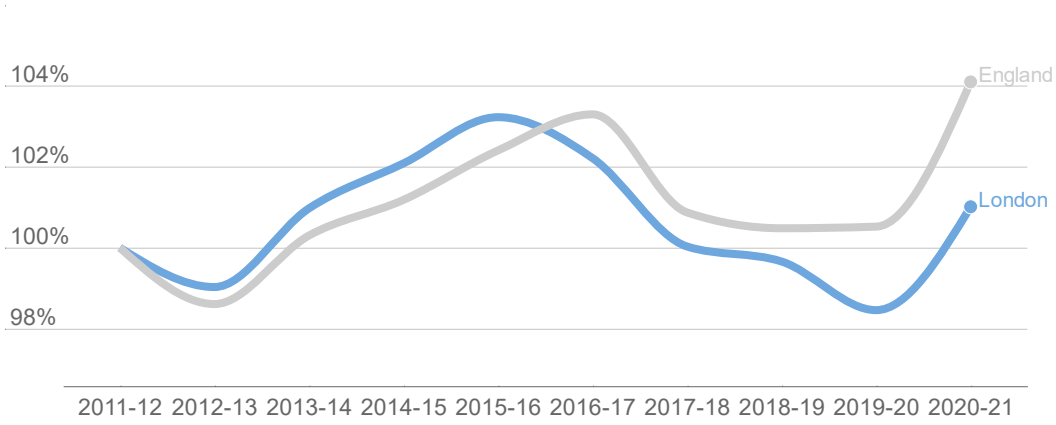
A London-wide map showing the hourly concentration of air pollutants, provided by the London Air Quality Network.

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

Waste and circular economy

Figure 8: Household waste collected by Local Authorities

% of 2011/12 values



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

The chart above shows how the volumes of household waste collected by Local Authorities have changed in London and England, compared to 2011/12 volumes.[21]

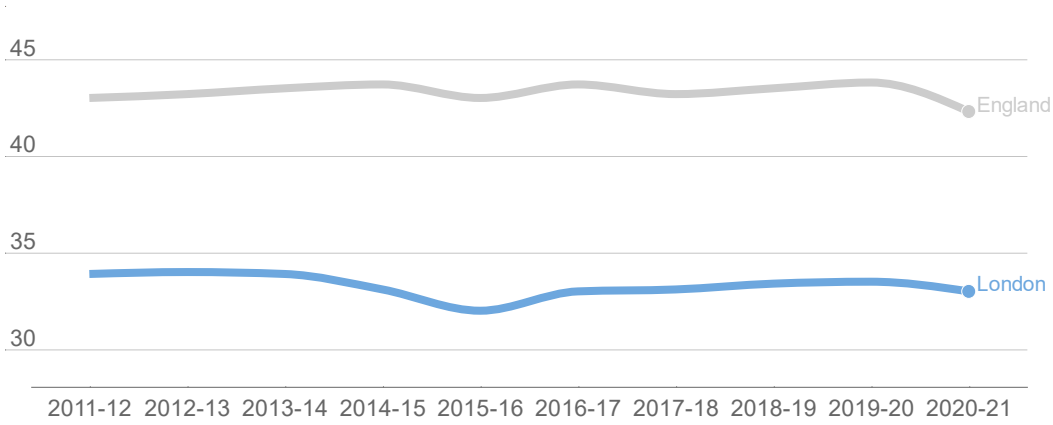
Trends between London and England remained relatively comparable. After increasing first by 3% with a peak in 2015/16 and 2016/17 for London and England respectively, the volume of collected waste started falling – albeit more intensely in London. Here, volumes of collected waste reached the minimum of the 10-year period in 2019/20, at about 98% of 2011/12 values.

However, 2020/21 saw a surge in collected waste, reaching the maximum in the period for England (+4% of 2011/12 volumes), whereas London experienced a more limited increase in this case (+1% of 2011/12 volumes). Such effect could be potentially explained as an impact of lockdown restrictions and the increase in working from home arrangements.

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

Figure 9: Households waste recycling rate

% of collected household waste



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

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

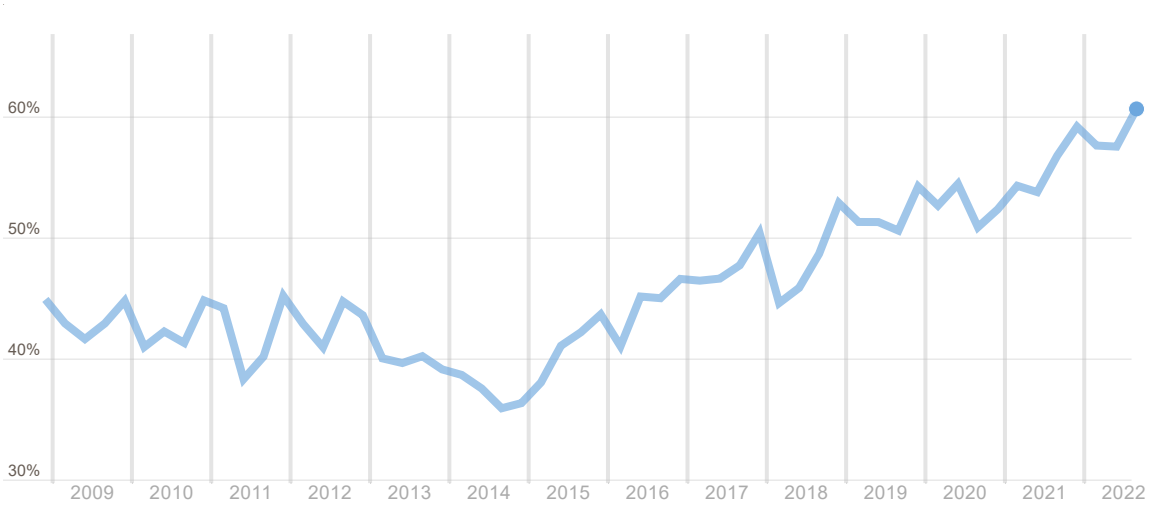
London has the lowest household recycling rate of any English region with a 2020/21 rate of 33% against a national rate of 43%. Increasing recycling in London is challenging, as a high proportion of Londoners live in flats (up to 80% in some areas), and compared to other English regions, London is a highly urban environment with limited space for segregation of waste and less garden waste is produced. London also has a highly transient and diverse population with over 100 languages spoken, which can make communicating different borough recycling services more difficult.

The rate has remained relatively consistent in recent years, both in London and nationally. The most recent Defra data shows London experienced a 0.5% decrease in recycling against a drop of 1.5% in the national figure in 2020/21, which included the impact of the pandemic and lockdowns.

Energy generation and efficiency

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

% of all domestic dwellings (new and existing homes) with an energy performance certificate rating of A-C, as a share of all homes registered on Buildings Register



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

Dwellings which are sold, let, or reconstructed require an assessment to obtain an energy performance certificate and a related rating between A and G, where A represents the highest efficiency rating and G the lowest. Such certificates (for existing or newly built dwellings) are added to the Energy Performance of Buildings Register.[22]

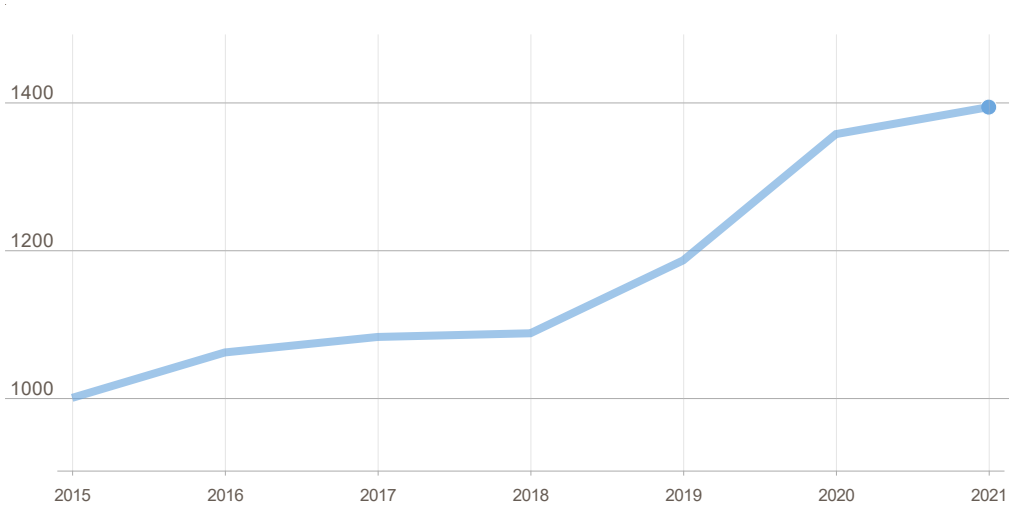
Figure 10 shows the share of those certificates added to the register in a quarter with an efficiency rating of A-C (not cumulative totals). Data are based on experimental statistics.

Since the last quarter of 2014, the energy performance of dwellings added to the register has been increasing steadily, with a more marked increase over the past year. Rising energy costs combined with the minimum energy efficiency standards (MEES) requirement for rental properties are both likely to have contributed.

[22] See DLHC, Live tables on Energy Performance of Buildings Certificates for CO2 emissions of all, new or existing dwellings added to the EPC register by quarter and local authority until 2021Q4.

Figure 11: Renewable electricity generation in London

Gigawatt-hours (GWh)



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

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

Over 2014-2021, renewable electricity generation in London increased by over 50% of 2014 values. Total energy consumption in London in 2019 (the latest data available from the LEGGI) was over 132,000 GWh – meaning renewable energy production accounted for over 0.9% of the total. In the same year, renewable energy production in London accounted for 1.6% of overall renewable generation in the UK, down from 1.4% in 2014.

Zero Carbon Circular Economy

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

Green infrastructure

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

9: HOUSING

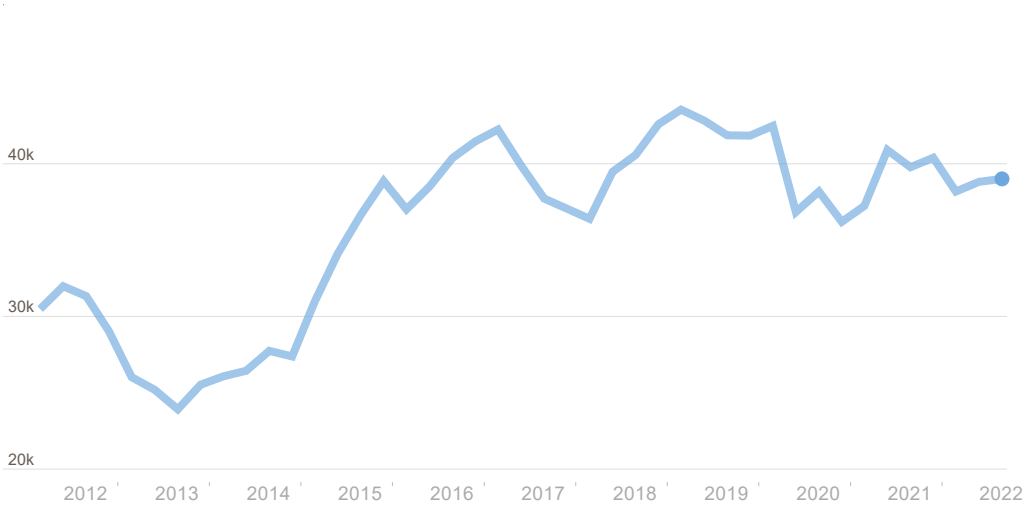
This chapter sets out trends in a range of key housing indicators, covering new supply, affordability and housing need.

The indicators covered here are all monthly/quarterly and recently updated, while the GLA's annual Housing in London report reports on a much larger set of indicators, including those reported annually and with a longer lag.

Housing supply

Figure 1: Annualised number of new homes completed in London

Energy Performance Certificates registered for new dwellings



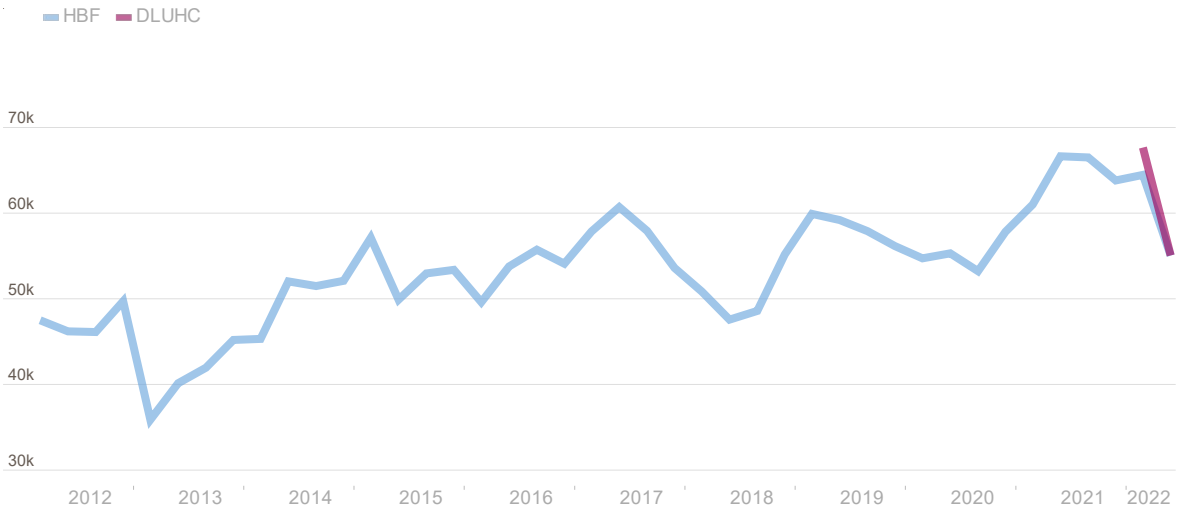
Source: DLUHC EPC live table NB1

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

There were 38,980 EPCs issued for new homes in London in the year to September 2022, down from 39,740 the year before and slightly below the pre-pandemic trend.

Figure 2: Annualised planning permissions for new homes in London

Number of planning permissions



Source: HBF Housing Pipeline Report; DLUHC planning application statistics

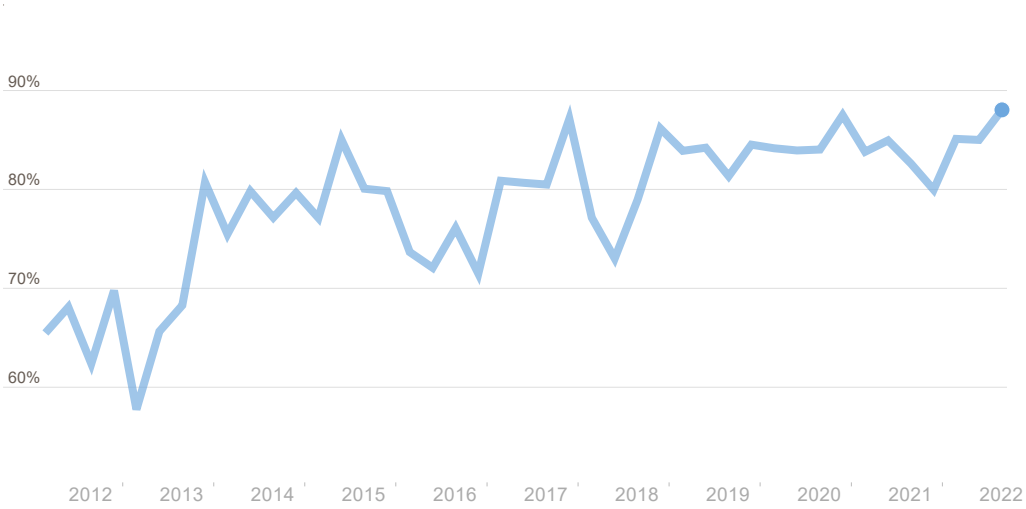
DLUHC report the annualised number of new homes given planning permission on a quarterly basis, and according to their most recent figures there were 55,000 new homes approved in London in the year to June 2022, down sharply from 66,580 the year before. These figures predate the recent increases in interest rates, and so are more likely to reflect the increase in construction material prices and other development costs seen since the pandemic.

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.

Energy efficiency and affordability

Figure 3: Energy efficiency ratings in new homes, London

% of homes registered with energy efficiency ratings of A or B, as a share of all new homes



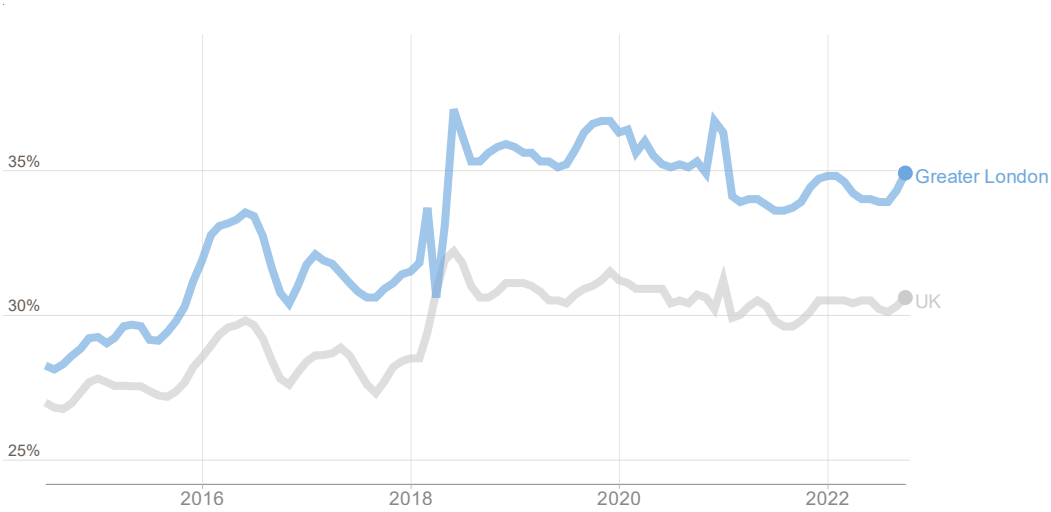
Source: DLUHC EPC live table NB1

According to data from Energy Performance Certificates, 88% of new homes completed in London in Q3 2021 had an energy efficiency rating of A or B, up from around 60% in 2012.

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

Figure 4: Private rent affordability

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



Source: Homelet Rental Index

According to data from tenant references collated by Homelet, the rent on new tenancies in London accounted for an average of 34.9% of tenant incomes in October 2022, an increase from the rates of the previous year but still below the last peak of 36.7% in December 2020.

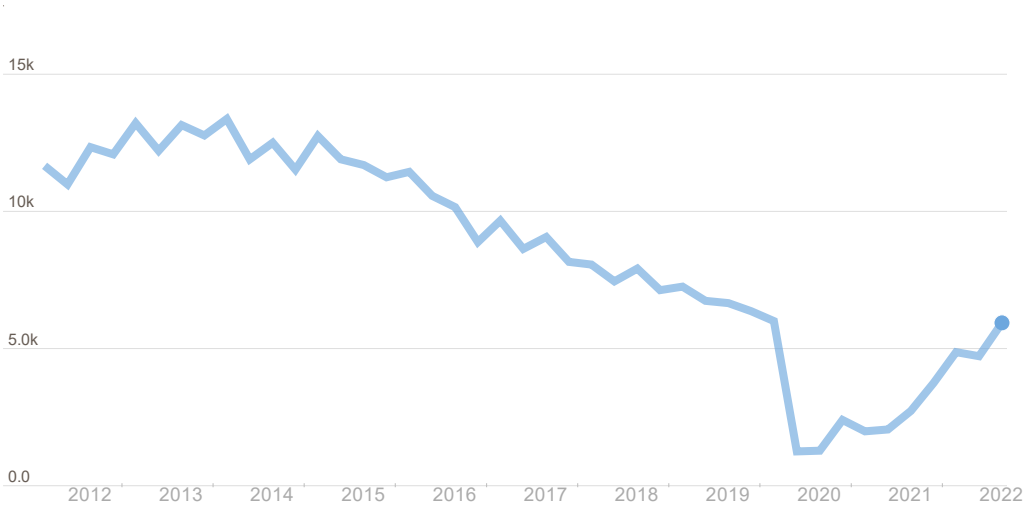
Across the UK as a whole, private rents on new tenancies accounted for 30.6% of tenant incomes.

Separate analysis of Households Below Average Income survey data indicates that Black, Asian and other minority ethnicity households in London's private rented sector tend to spend a higher proportion of their income on rents than White households.

Housing need

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

Number of claims



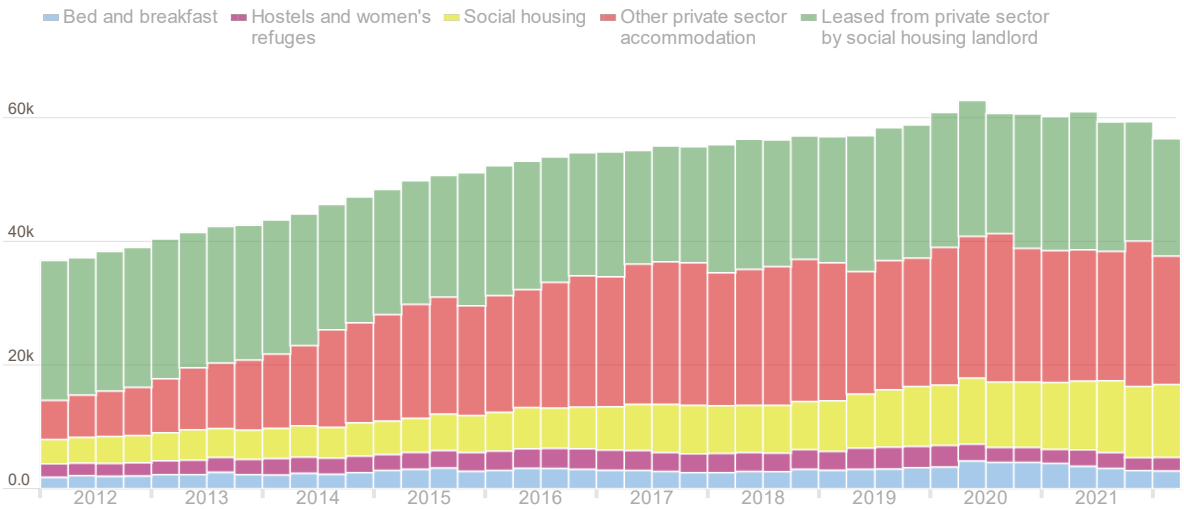
Source: MOJ mortgage and landlord possession statistics

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

Claims by social and private landlords in London fell from 6,720 in Q2 2019 to 1,230 in Q2 2020, before increasing again to 5,920 in Q3 2022. As was the case before the pandemic, it is likely that some claims will not end up resulting in actual possessions (partly because some tenants move out ahead of possession proceedings).

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

Number of households



Source: DLUHC statutory homelessness local authority tables

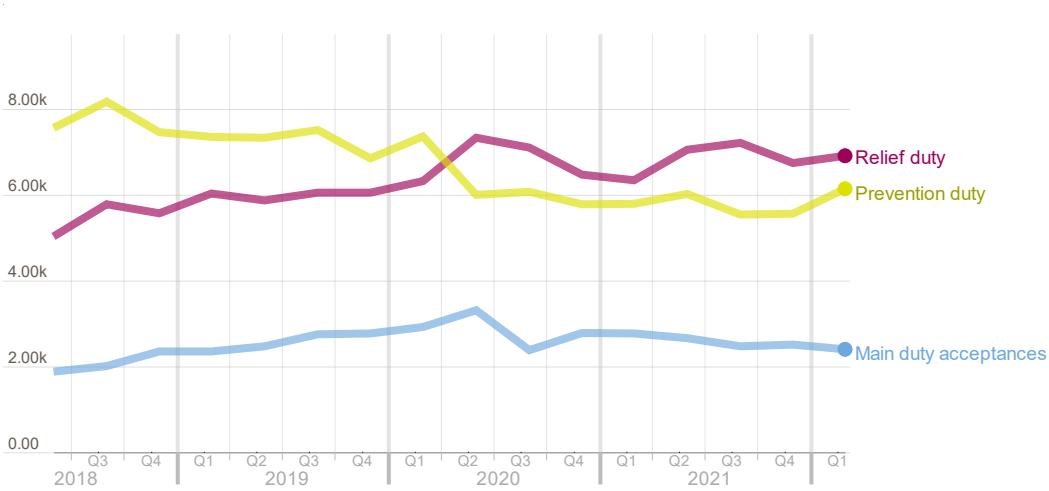
At the end of March 2022 there were 56,460 homeless households in temporary accommodation arranged by London boroughs, down from a peak of 62,650 in June 2020.

38,160 of the households accommodated in March 2022 had children, with a total of 75,850 children between them.

The number of households in bed and breakfast accommodation (2,890) has fallen after increasing sharply during 2020. 11,770 were being temporarily accommodated in social housing in March 2022, the highest figure ever recorded.

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

Number of households



Source: DLUHC statutory homelessness local authority tables

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

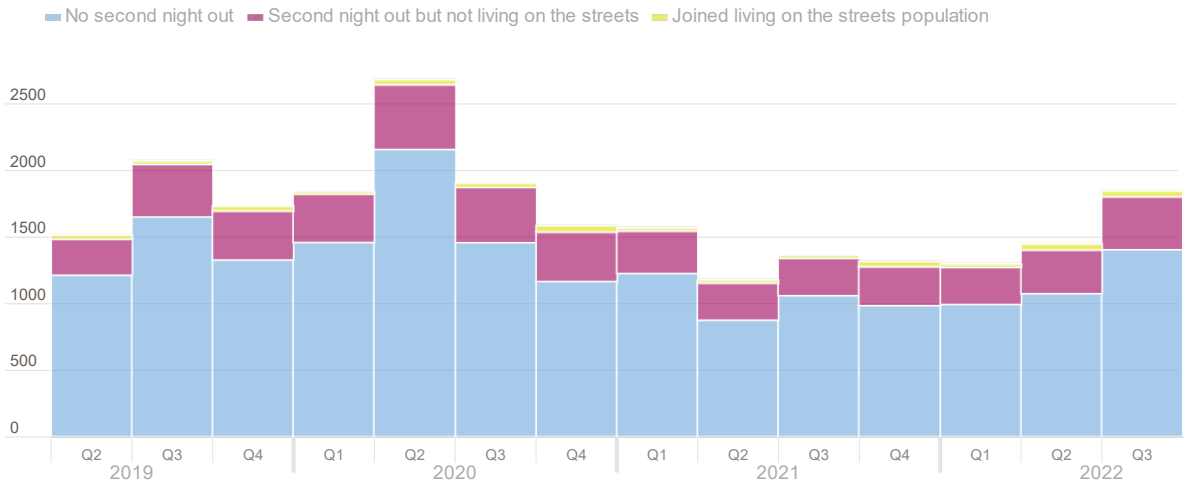
There were 13,050 households assessed as owed a new prevention or relief duty in London in Q1 2022, including 6,140 prevention and 6,910 relief duties. The number of households owed a prevention duty has fallen since the onset of the pandemic while the number already homeless and owed a relief duty has risen.

There were 2,400 households accepted as owed a main homelessness duty by London boroughs in Q1 2022, a figure that has fallen slightly since late 2020.

Analysis by the GLA shows that Black and mixed ethnicity households in London are made homeless at a significantly higher rate than Londoners from other ethnic backgrounds.

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

Number of people



Source: GLA CHAIN quarterly rough sleeping reports

In the third quarter of 2022 outreach teams recorded 1,844 people sleeping rough in London for the first time, up from 1,361 in the third quarter of 2021 and similar to pre-pandemic levels. This figure peaked at 2,680 in Q2 2020, immediately after the first national lockdown was announced.

1,404 of the new rough sleepers seen in Q3 2022 spent only one night sleeping rough, while 396 were recorded sleeping rough for more than one night but not considered to be living on the streets. 44 people were judged to have joined the population living on the streets.

10: INCOME, POVERTY & DESTITUTION

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

Further information and other related measures can be found in the analysis section and on the Economic Fairness pages of the London Datastore.

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

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

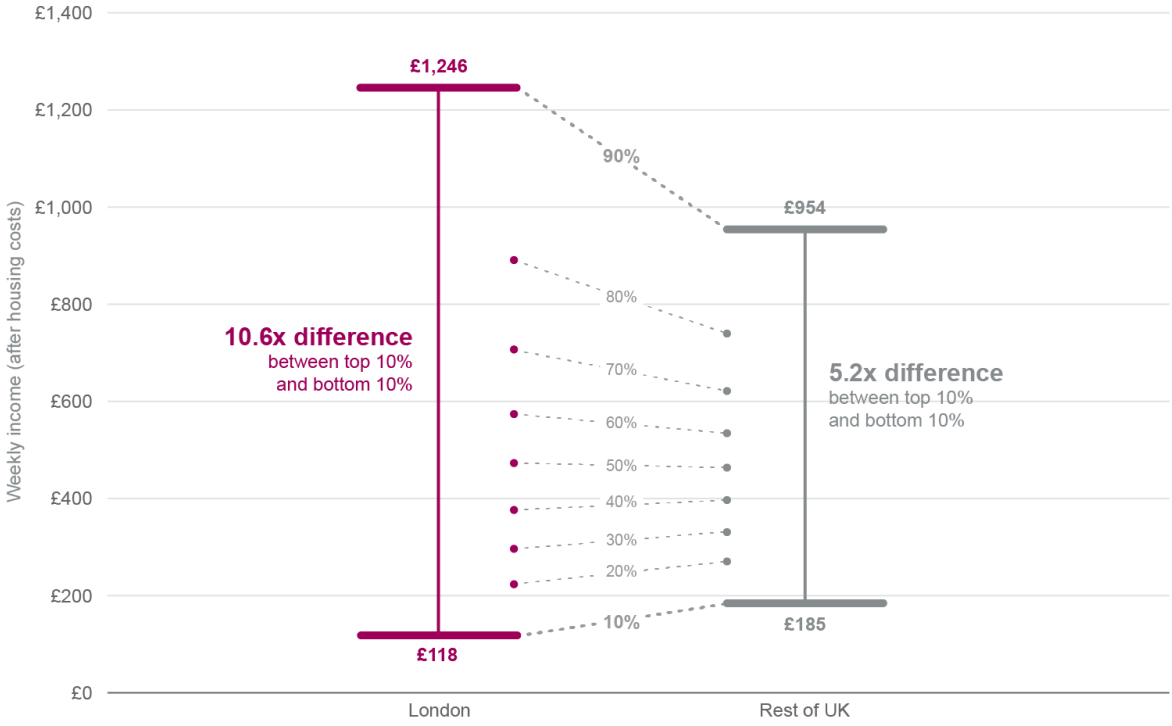
The indicators look at the distribution of income and income inequality, which can be regarded as the difference between incomes at the higher and lower ends of the income distribution or as the difference in income between different groups of the population, and at a measure of average or "typical"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

The official statistics which are the most robust source of data on income and poverty cannot be updated beyond 2019/20 due to the impact of methodological changes to the Family Resources Survey as a result of the pandemic which have meant that DWP have not published the regional data. We have supplemented these figures with more recent alternative data for London where possible.

Income Inequality

Figure 1: Income inequality, London and Rest of UK, 2017/18-2019/20

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



Source: DWP Households Below Average Income (HBAI)

While it is often perceived that incomes in London are high, "typical" income is only very slightly higher in London than elsewhere in the UK. Median equivalised income after housing costs for a couple in London was £473 per week for 2017/18-2019/20, just £10 above the median for the rest of the UK.

The inequality of incomes within London is stark, with the richest tenth of Londoners having more than ten times the income of the poorest tenth.

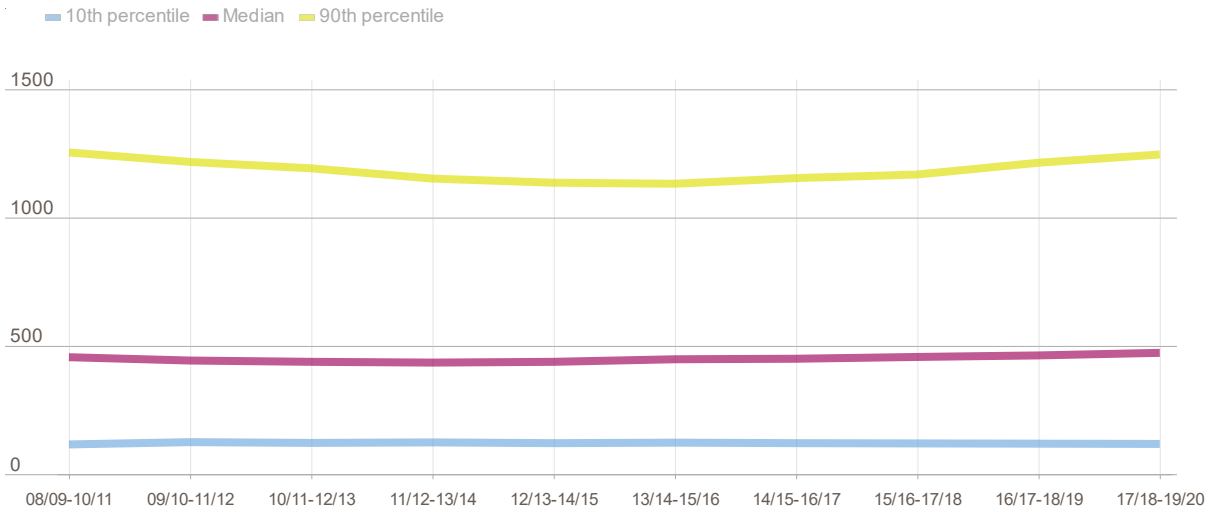
Incomes at the lowest decile in London are 30% below the rest of the UK. Incomes at the highest decile are 30% higher than the rest of the UK. Overall, the ratio of income at the top decile to bottom decile (known as the 90:10 ratio) is 10.6 for London, twice the ratio for the rest of the UK (5.2).

This picture of low disposable income in London is also apparent in the Paycheck data from CACI[23]. This shows that in 2021, on average, gross annual household income in London was higher than almost all other regions, at £45,500, compared with a UK average of £40,300. However, disposable income in London was far lower than for any other region, averaging £13,000, more than £2,000 per year less than in any other region and compared to a UK average of £17,200.

[23] https://pages.caci.co.uk/wealth-of-nation-2021.html

Figure 2: Median disposable income and income inequality, London

Weekly Disposable Household Income After Housing Costs, London



Source: DWP, HBAI 3-year average median equivalised income AHC indexed to 2019/20 prices

Income after housing costs at the lowest decile of the income distribution in London has barely changed in real terms for a decade, ranging between £116 and £125.

The inequality ratio of the highest decile to the lowest decile therefore fell from 10.8 to 9.2 and has risen again to 10.6.

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 median income for the UK. This is the most robust measure, as it captures all income sources and covers the entire household population. However, the data are annual and lagging, particularly due to issues with the survey data during the pandemic (see footnote above).

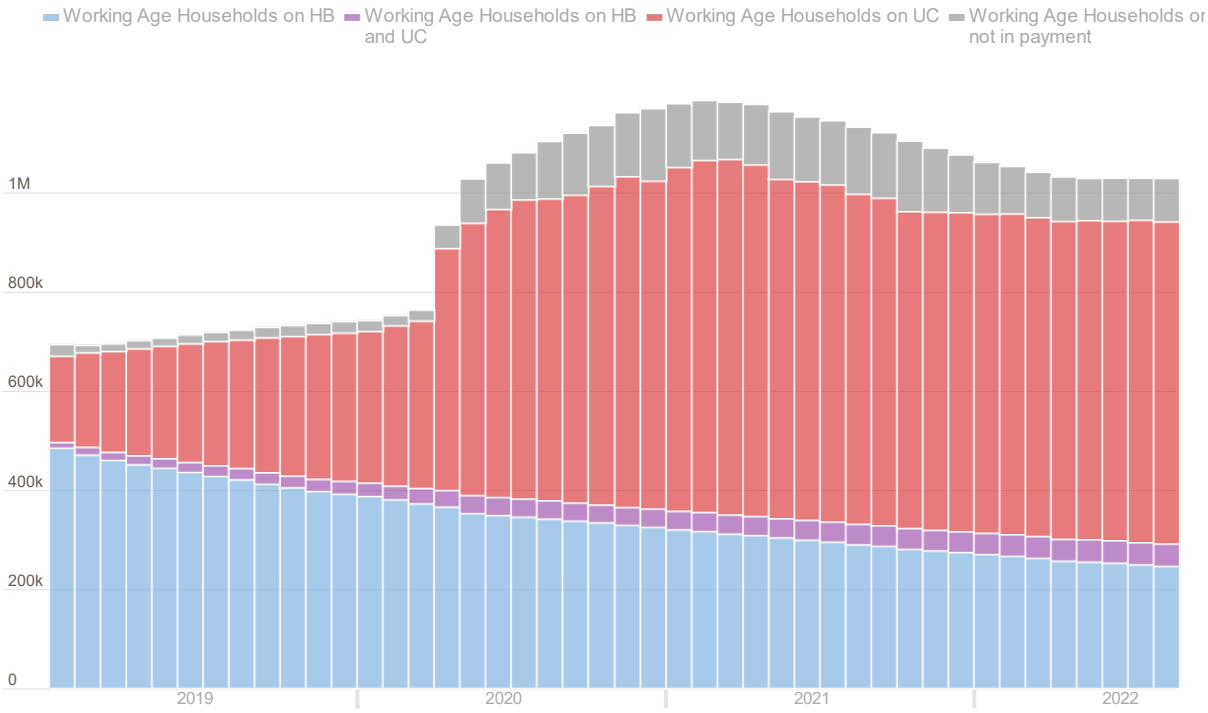
Administrative data on means tested benefits can be used to give a more timely proxy. Data on Universal Credit (UC) claims can be combined with data on Housing Benefit (HB) claims to provide a broader view, although some people are still moving across to Universal Credit from other, older legacy benefits.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

As well as means tested benefits and relative poverty, this section looks at persistent poverty. Persistent poverty is defined as living in a low income household in the latest year and at least two of the previous three years. People in this situation are least likely to be able to participate fully in society and achieve a healthy lifestyle.

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

Figure 3: Working age London Households on means tested benefits

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



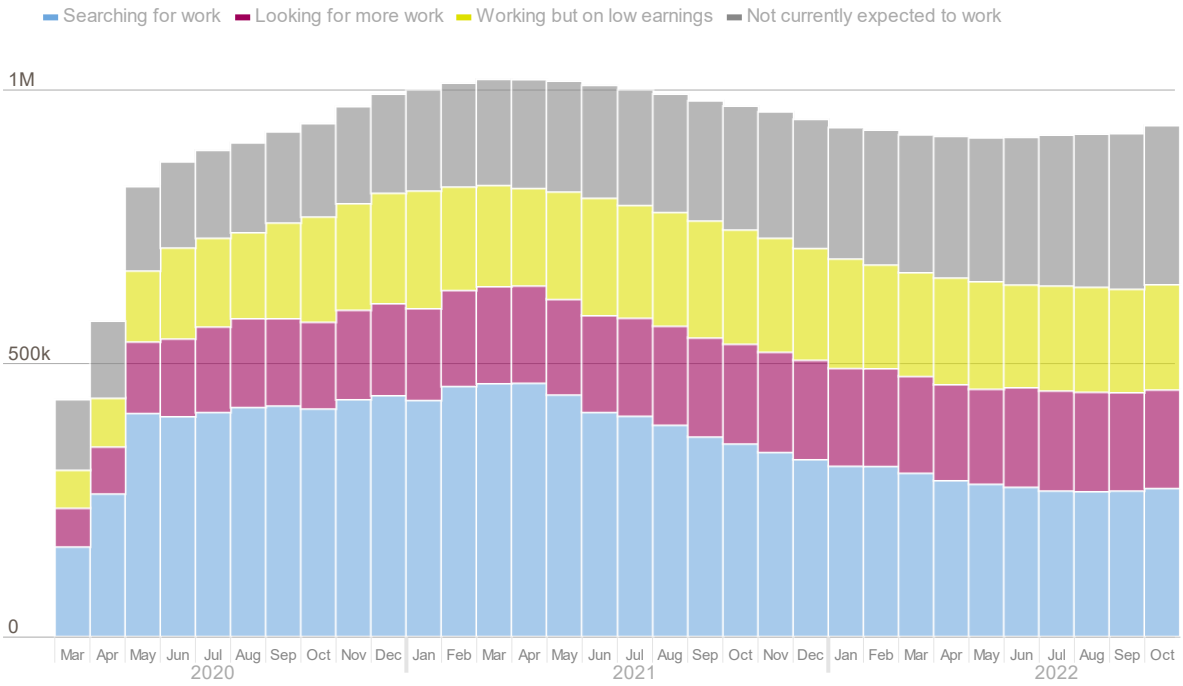
Source: DWP Benefits data via Stat-Xplore

There were just over a million households in London with working age adults claiming one or both of the two main means-tested benefits, as of August 2022. The number claiming Housing Benefit (HB) is reducing over time, as people either stop claiming altogether or move onto Universal Credit (UC). More than half of claimants are single without children.

Around 42,000 London households have their payments capped, more than half of them single parent households. This total is down from over 64,000 London households in March 2021, most notably falling when the £20 UC uplift ended in October 2021.

Figure 4: Londoners claiming Universal Credit by work status

Summarised work conditionality status of people on Universal Credit



Source: DWP Benefits data via Stat-Xplore

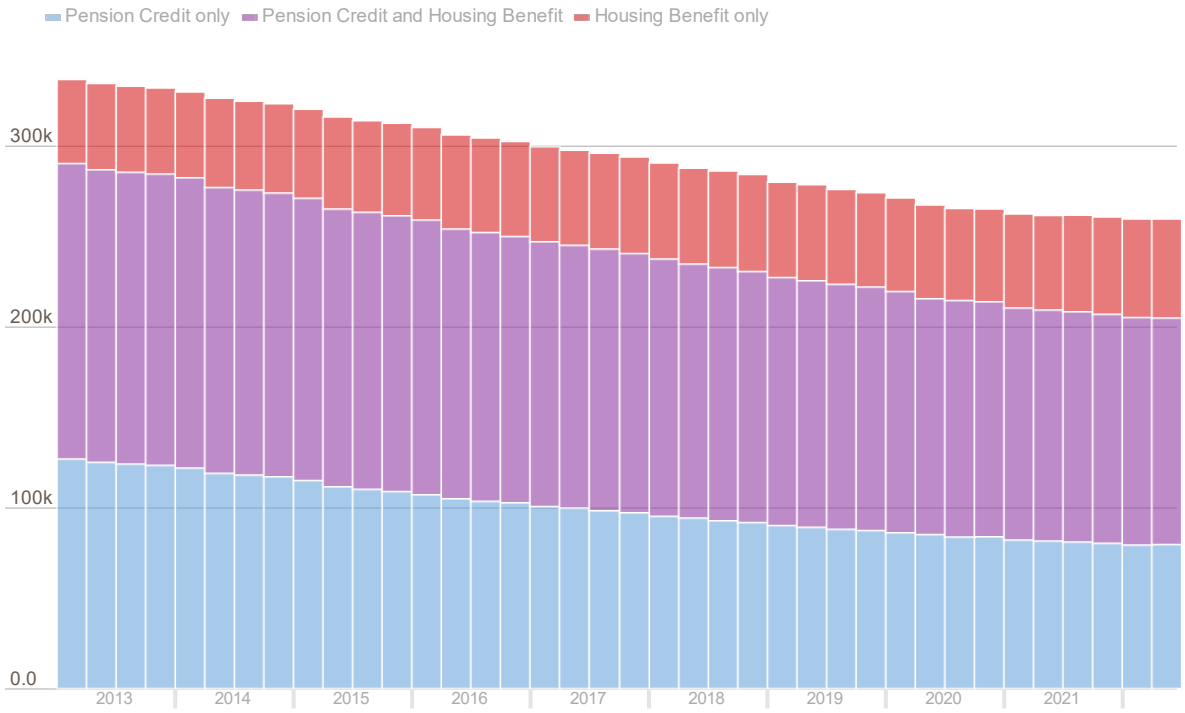
The number of Universal Credit claimants that are either in low paid work on low earnings or unable to find sufficient work is over 370,000. This clearly exceeding the number that are out of work and searching for work[24], suggesting that the proportion of in work poverty may be continuing to increase.

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

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

Figure 5: Pensioners claiming means tested benefits

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



Source: DWP Benefits data via Stat-Xplore

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

The numbers claiming have reduced over nearly two decades, even further than would be expected from the rise in pensionable age, decreasing from almost a third of all pensioners[25] in 2013 to a quarter in 2022.

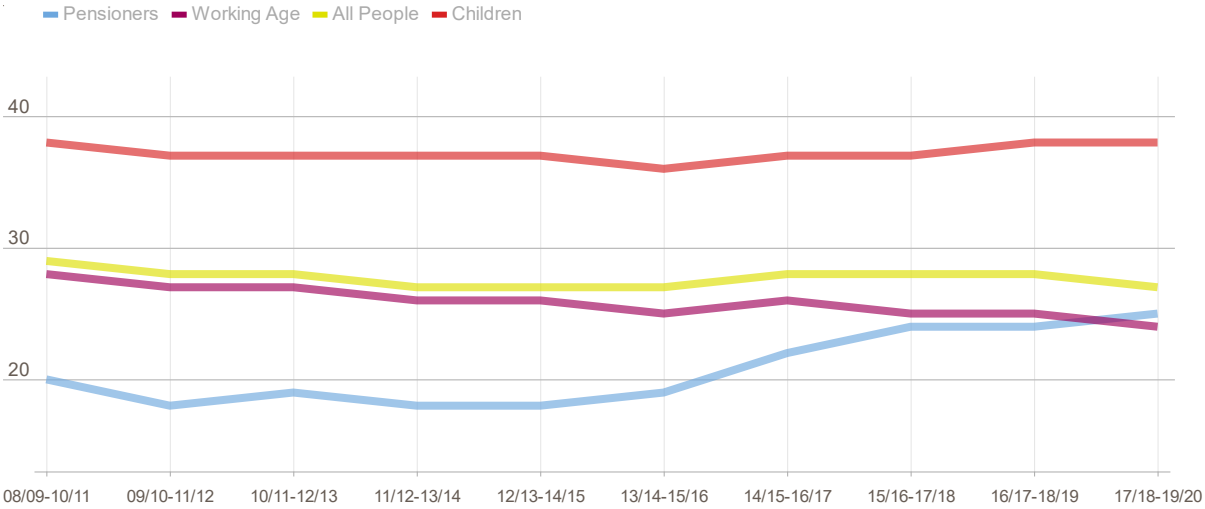
Most recipients of PC get an amount to top up their overall income to a guaranteed level. Fewer than 50,000 have additional savings or pensions which increases the amount of pension credit they receive. Many also receive Housing Benefit, but not all receive a State Pension. Fewer than 55,000 claim HB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

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

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

Figure 6: Relative poverty in London

Percentage of people living in London households with income below 60% contemporary median – After Housing Costs (AHC)



Source: DWP Households Below Average Income

Relative poverty has decreased very slightly overall in London over 25 years, with 27% of the population living in households with less than 60% of the national median income after taking account of housing costs. That represents 2.4 million Londoners, up from 2 million in the 1990s.

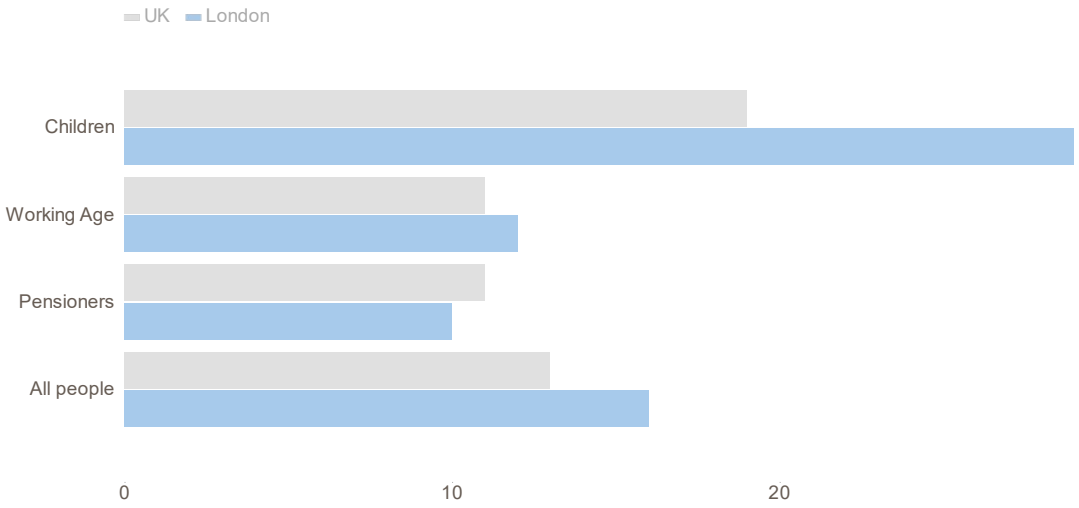
London has a higher poverty rate than any other part of the UK.

The proportion of children living in poverty in London has been consistently higher than anywhere else in the UK. The child poverty rates are particularly high in Inner London, though they have decreased a little, whereas Outer London rates have been stable.

Poverty rates among pensioners in London had fallen substantially, but have risen again in recent years.

Figure 7: Persistent poverty

Percentage in persistent poverty after housing costs (2016-2020)



Source: DWP Income Dynamics

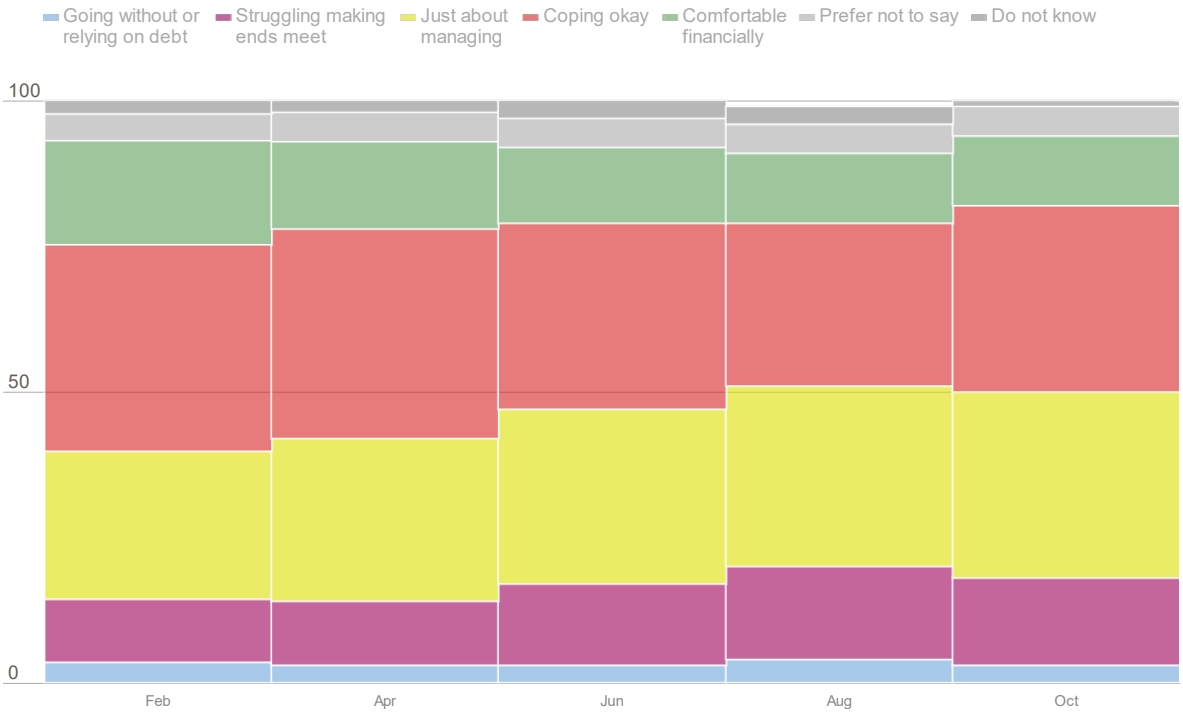
One in six Londoners were classed as in persistent poverty between 2016 and 2020.

In London, three in four of the children in poverty are in persistent poverty – 29% of all children (600,000). This had risen from less than 25% in 2010-2014. This is much higher than in the UK as a whole, and this pushes the proportion of all people in persistent poverty in London well above the national average.

The proportions of working age and pensionable age Londoners in persistent poverty have also been fairly stable over time and are closer to the national picture.

Figure 8: Struggling financially

Percentage of people in different financial situations



Source: YouGov survey Jan-Oct 2022

All figures, unless otherwise stated, are from YouGov Plc for the GLA. Total sample sizes were between 1015 and 1299 adults. The surveys were carried out online. The figures have been weighted and are representative of all London adults (aged 18+).

When asked how they were coping financially, in October 2022, just 44% of Londoners said they were coping okay or comfortable financially, down from half in April with just under a third just about managing in October.

One in seven (15%) said they were struggling, with a further 3% not able to manage; going without or relying on debt to pay for their basic needs. The most notable changes seen over the last few months are a continued decrease in those saying they are comfortable financially, with more struggling to make ends meet.

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

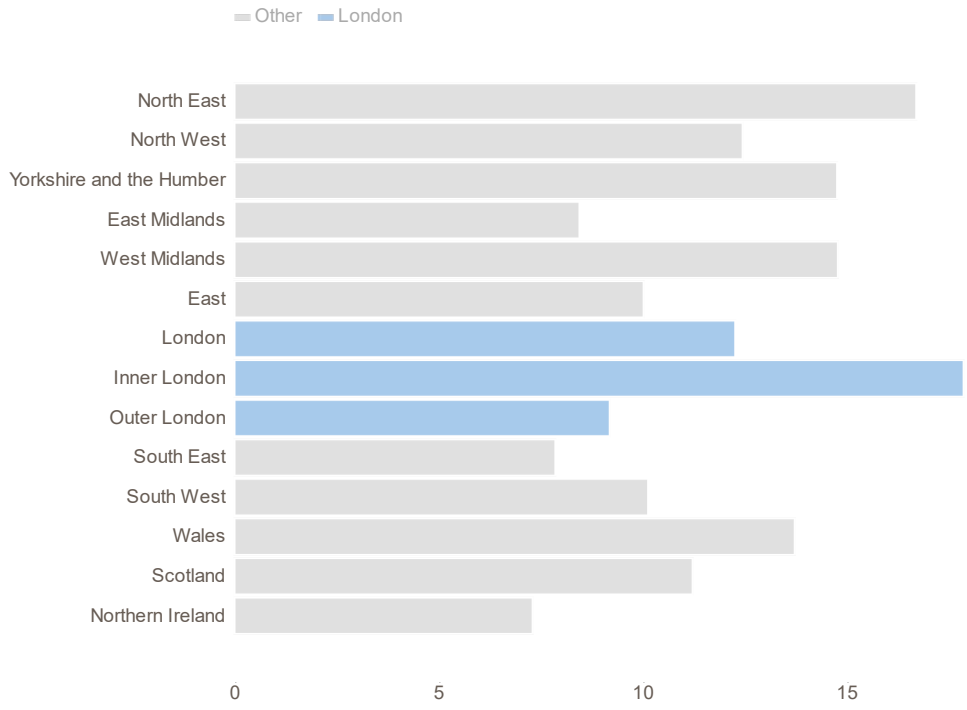
Around 45% of adults paying rent or mortgage payments had fallen behind or struggled, while about half of those paying household bills or with credit payments had fallen behind or struggled over the previous six months.

To manage living costs, 8% of Londoners reported going without essentials, while half of Londoners reported spending less on non-essentials, using less water, energy or fuel and buying cheaper products, a third were buying less food and essentials, with one in six were going into debt to help manage living costs. Taking on more paid

work (10%), looking for better paying jobs (15%) and negotiating wage increases (5%) were also among the ways Londoners were managing living costs.

Figure 9: Material deprivation among children

% of children who experience material deprivation and low income



Source: DWP Households Below Average Income 2017/18-2019/20,

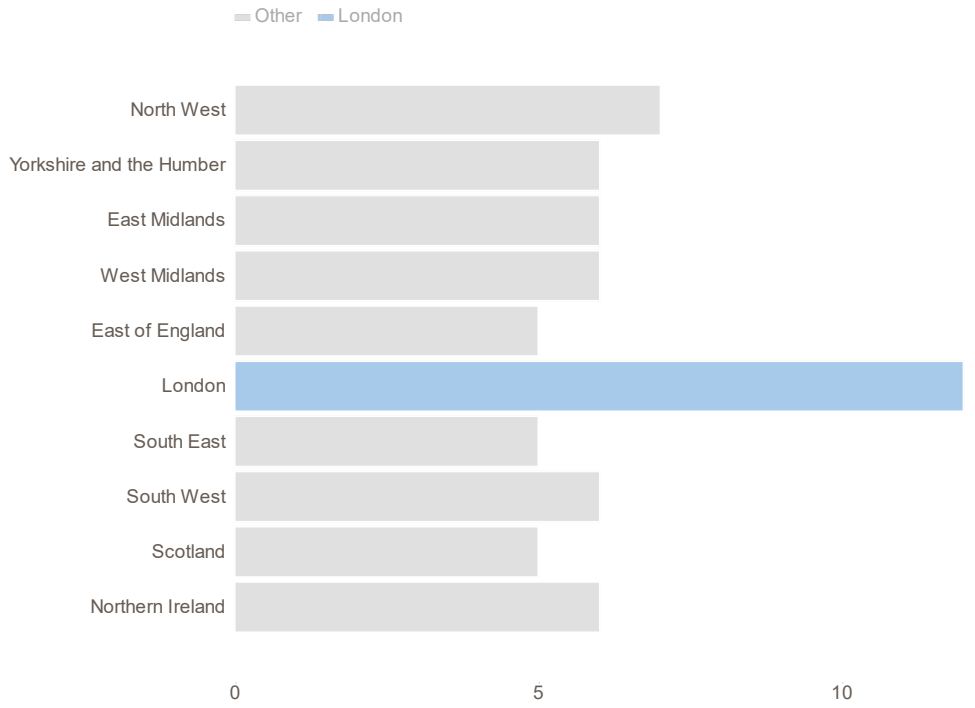
Another facet of poverty is when people cannot afford the goods and services considered to indicate a minimum acceptable norm in society, this is described as material deprivation.

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

One in eight children in London (12.5%) live in a household with low income (before housing costs) and in material deprivation, similar to the proportion across the UK as a whole, but in Inner London this rises to more than one in six (17%).

Figure 10: Material deprivation among older people

Percentage of pensioners in material deprivation by region (2017/18-2019/20)



Source: DWP Households Below Average Income, DWP
Note: Data for the North East, Wales, Inner and Outer London is suppressed due to small sample sizes.

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

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

The overall rate for London and nationally has decreased slightly in recent years.

Destitution

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

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

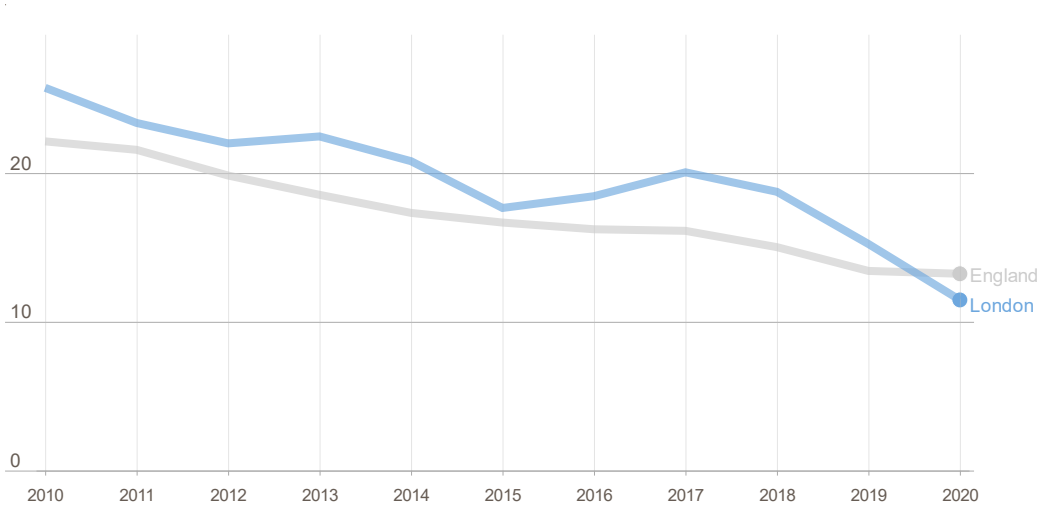
- fuel poverty, where the costs of keeping warm are balanced against income.

- food insecurity, meaning that at times a person's food intake is reduced and their eating patterns are disrupted because of a lack of money and other resources for obtaining food.

- personal insolvencies, which is included as an indicator of the extent to which individuals have a level of debt that it becomes unmanageable.

Figure 11: Fuel poverty

Proportion of households in fuel poverty, London and England 2010 to 2020



Source: BEIS Low Income, Low Energy Efficiency dataset

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

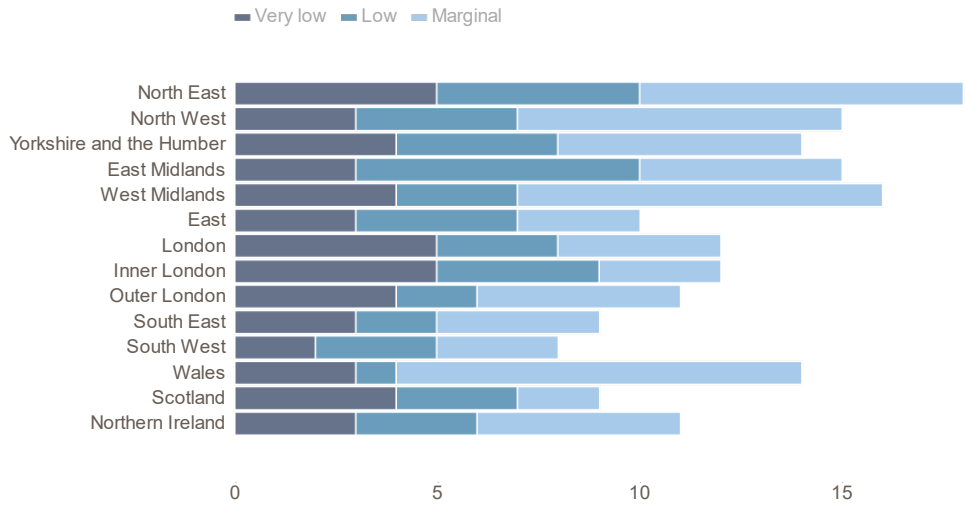
How fuel poverty is measured has changed over time. The latest official definition used by BEIS is low income households that are also in low energy efficiency housing. By this measure, fuel poverty has been decreasing over the last decade, both in London and nationally.

The level of fuel poverty in London has for the first time fallen below the level for the UK as a whole for April 2019-March 2021 (labelled as 2020), but 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.

This measure does not vary greatly with changes in energy prices. The recent changes in fuel costs, increasing for many during 21/22 and with a further increase from April 2022 averaging nearly £700 per year, will hit people living in low income households the hardest, particularly those living in rented accommodation.

Figure 12: Food security

Percentage of households with differing levels of food insecurity



Source: DWP Family Resources Survey 2020/21

Eighty-eight per cent of households in London had high food security[26] in 2020/21, with 7% being classed as food insecure (either low or very low food security). The North East (11%) and East Midlands (9%) regions had the highest levels of food insecurity[27]. London, particularly Inner London and the North East had the highest levels of households with very low food insecurity during 2020/21.

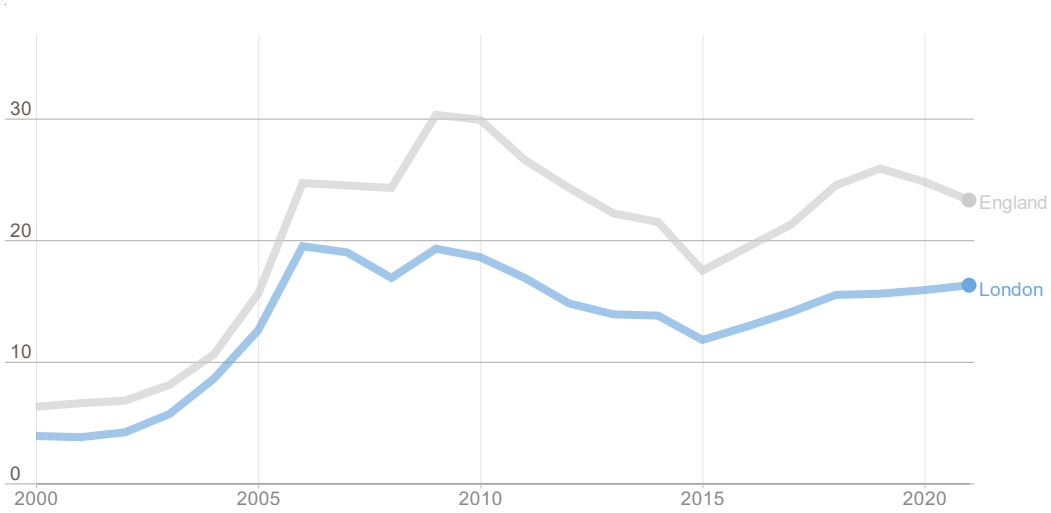
In 2021/22, the Survey of Londoners found that around one in six (16%) adults in London had low or very low food security at some time in the last year, down from one in five in 2018/19. The drop may be attributed, at least in part, to the extraordinary measures, including furlough and the uplift to Universal Credit, put in place during the COVID-19 pandemic. The groups most likely to be food insecure include single parents, Londoners reliant on cash and social renters (all around 40%). One in eight food insecure Londoners had collected a food parcel from a food bank in the previous 12 months.[28]

In October 2022, 14% of Londoners had regularly (6%) or occasionally (8%) gone without food or essentials or had to rely on external support such as food banks over the previous six months.[29]

[26] The Family Resources Survey asks a series of questions about access to food over the last 30 days to derive this measure. Difficulties conducting the survey during the pandemic means that there are higher levels of uncertainty with the figures than usual.
[27] Rounded figures are used, so figures shown in the chart may not sum to those quoted.
[28] https://data.london.gov.uk/dataset/survey-of-londoners-2021-22
[29] YouGov Plc. Total sample size for October was 1162 adults. Fieldwork was undertaken between 21st – 27th October 2022. The survey was carried out online. The figures have been weighted and are representative of all London adults (aged 18+) https://data.london.gov.uk/dataset/gla-poll-results-cost-of-living-2022

Figure 13: Debt and Personal insolvencies

Insolvencies per 10,000 population



Source: Insolvency Service

Around 5% of households were in arrears on household bills in 2016/17-2018/19[30]. By June-September 2022, that had risen sharply, with 5% of Londoners behind on rent or mortgage payments and 9% behind on energy bills. (Other household bills are not recorded.) Both these are the highest of any region in England.[31] Similarly, a YouGov online survey covering only London found that in October 2022, 6% of Londoners reported they had fallen behind on rent or mortgage payments and 7% on energy and other bills (not necessarily the same people).[32]

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

There were 11,353 individual insolvencies in London during 2021, just over 16 in 10,000 adults, far lower than in any other region of England and Wales.

In all three categories of insolvencies, London had lower rates than other regions, in contrast with the higher percentages in arrears in household bills.

[30] Family Resources Survey, DWP
[31] Office for National Statistics, Opinions and Lifestyle Survey (OPN)
[32] YouGov Plc. Total sample size for October was 1162 adults. Fieldwork was undertaken between 21st – 27th October 2022. The survey was carried out online. The figures have been weighted and are representative of all London adults (aged 18+) https://data.london.gov.uk/dataset/gla-poll-results-cost-of-living-2022

11: TRANSPORT & DIGITAL INFRASTRUCTURE

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

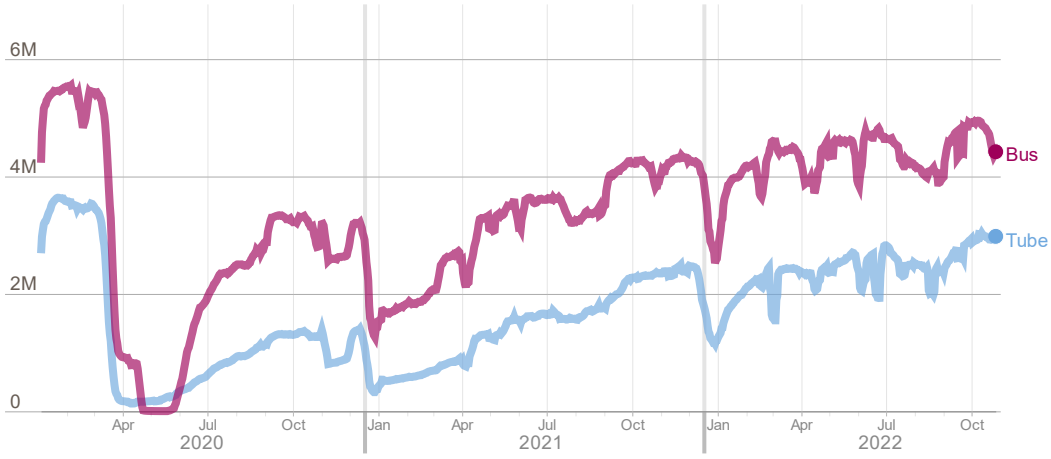
The transport section draws mainly on summary indicators from the 'Travel in London' (TiL) report, an annual publication by TfL which provides trends and developments relating to transport and travel in London. It focuses on those indicators that form part of a data-led tracker that TfL developed to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

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

Public Transport demand and mode share

Figure 1: Demand for public transport

Number of journeys by bus and Tube on the TfL network



Source: TfL. Note: See the Resilience Dashboard for the latest data. For more detailed data, see the TfL Network Demand dashboard.

Demand has risen steadily during 2022 following the COVID-19 pandemic. As of October 2022, demand had reached a high point of 84% on buses, and 82% on the Tube, of pre-pandemic levels[33].

The broad relativities between the modes established during the pandemic seem to have persisted for most of the recovery so far, although recent values from autumn

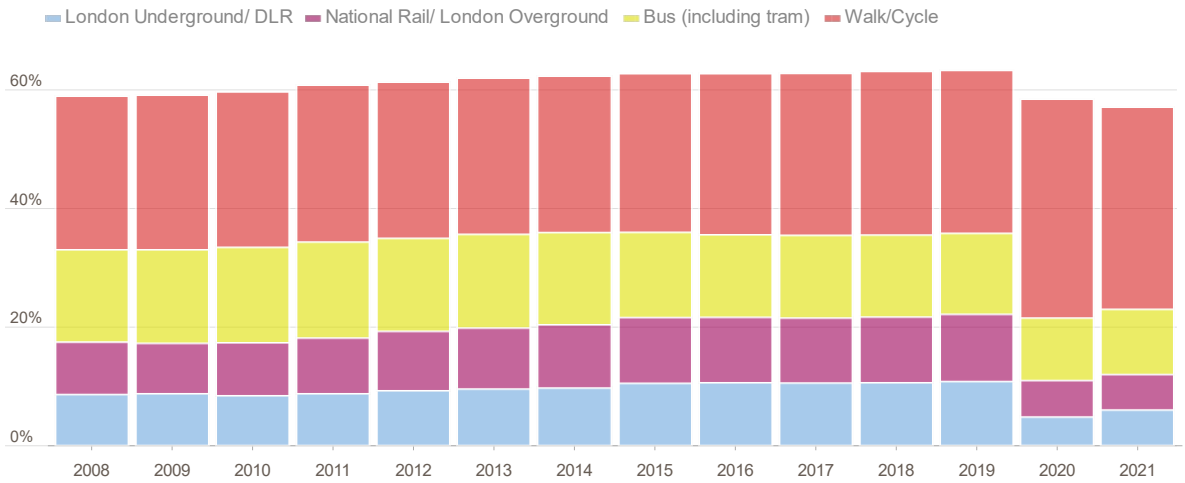
[33] https://content.tfl.gov.uk/travel-in-london-report-15.pdf

2022 suggest a strong recovery on the London Underground that is closing the gap with buses and the overall public transport trend.

Note that in later 2022 months, a number of external events such as industrial action, the state funeral of Queen Elizabeth II, and extreme weather events have disrupted activity and travel patterns.

Figure 2: Active, efficient, and sustainable travel mode share

Proportion of trips by mode for active, efficient, and sustainable travel



Source: TfL (2022) "Travel in London 15'

Before the pandemic, the proportion of all trips in London made by active, efficient and sustainable modes (public transport, walking or cycling) was increasing steadily over time, with 63% of all trips in 2019 made by these modes. This was mostly due to consistent growth in public transport use (primarily rail and Tube). Walking/ cycle mode share also increased gradually over the period. However, bus use has decreased over time; between 2008 to 2014 bus trips accounted for around 16% of all trips made each year, whereas for the years 2015 to 2019 around 14% of all trips were made by bus.

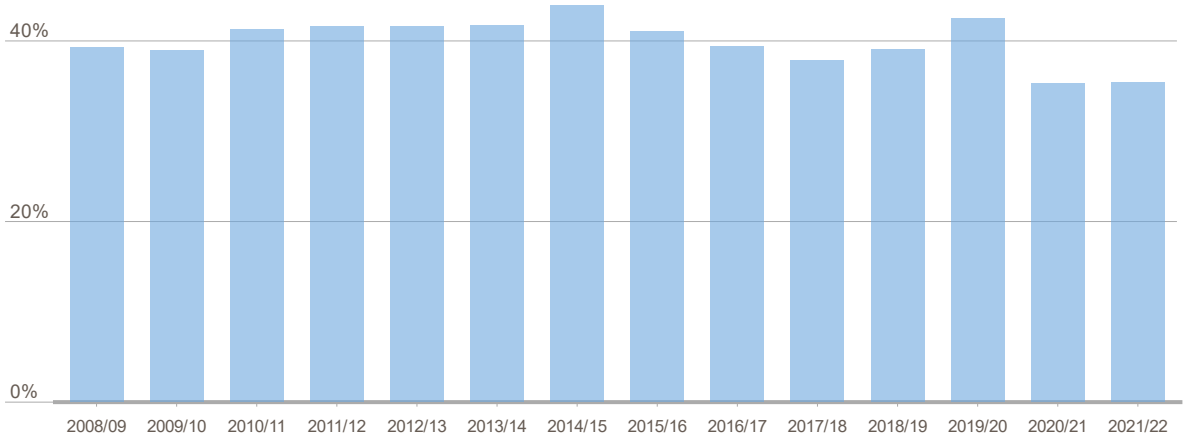
Although public transport mode shares declined during the pandemic, this was compensated by an increase in the active travel mode share, meaning that the net impact on the active, efficient and sustainable mode share was relatively small.

In 2021, public transport trips have remained fairly similar to the levels seen in 2020. However, the active travel mode share has declined slightly from 37% of all trips in 2020 to 34% in 2021.

Active travel

Figure 3: Active travel

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



Source: TfL (2022) "Travel in London 15'

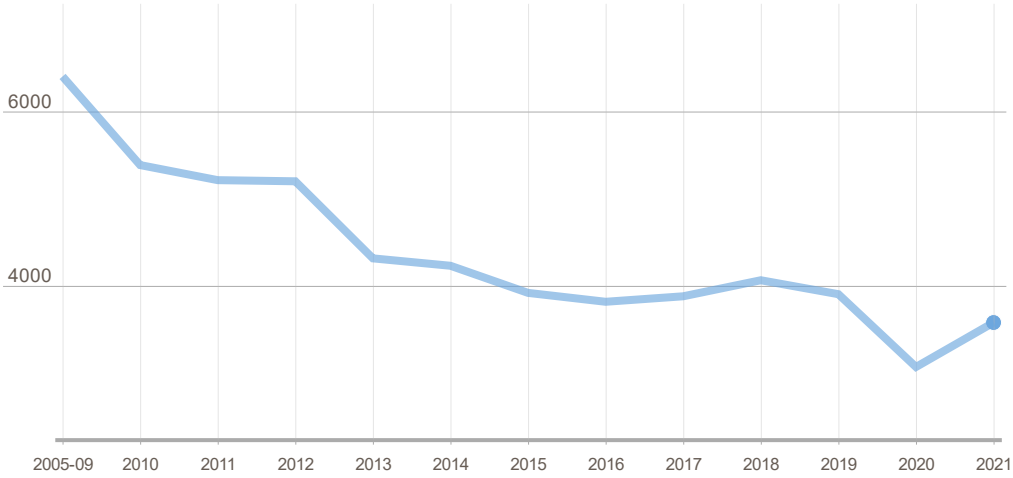
Active travel is a good way of building exercise into peoples' daily routines to maintain good health and wellbeing. The historic trend for Londoners who achieve at least 20 minutes of active travel per day prior to the pandemic was relatively flat, with around 40% of Londoners on average achieving this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

Data suggests that the proportion of Londoners achieving 20 minutes of active travel per day decreased during the pandemic, with 35% of Londoners aged 20 and over, achieving above the recommended benchmark in 2020/21 and 2021/22.

Safety on transport

Figure 4: Road traffic collisions

Number of people killed or seriously injured (KSI) in road traffic collisions



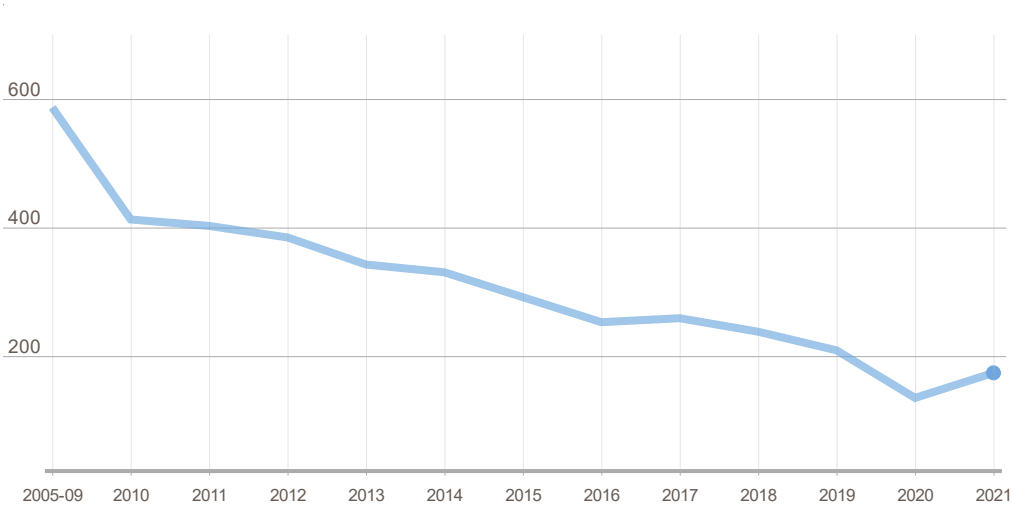
Source: TfL (2022) "Travel in London 15'. For more detailed data, see the Road safety data reports.

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

In 2021 there was an overall increase of 17% in people killed or seriously injured on London's roads, compared to 2020. This represents a 44% reduction relative to the 2005-09 baseline.

Figure 5: Safety on the bus network

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



Source: TfL (2022) "Travel in London 15'. For more detailed data, see the Road safety data reports.

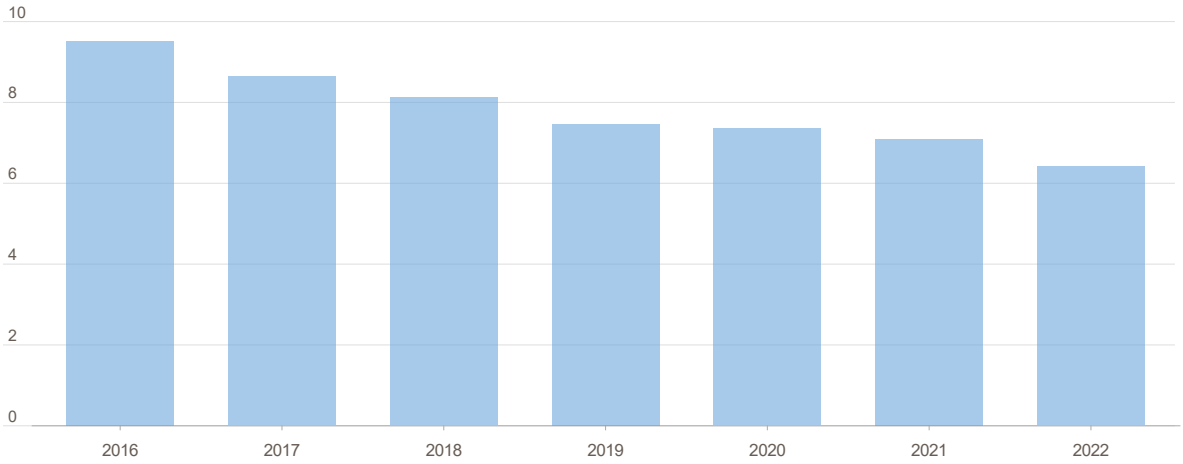
The number of people killed or seriously injured involving buses has also seen a continual decline from the average for the period 2005-09 (the baseline set by TfL) until 2020.

However, in 2021, there was a 29% increase in people killed or seriously injured in collisions involving a bus compared to 2020, up from 135 to 174 people. Overall, this represented a 71% reduction against the baseline, exceeding the overall target of a 70% reduction by 2022.

Transport accessibility and affordability

Figure 6: Physical accessibility of the network

Relative additional journey time using the step-free network (mins)



Source: TfL (2022) "Travel in London 15".

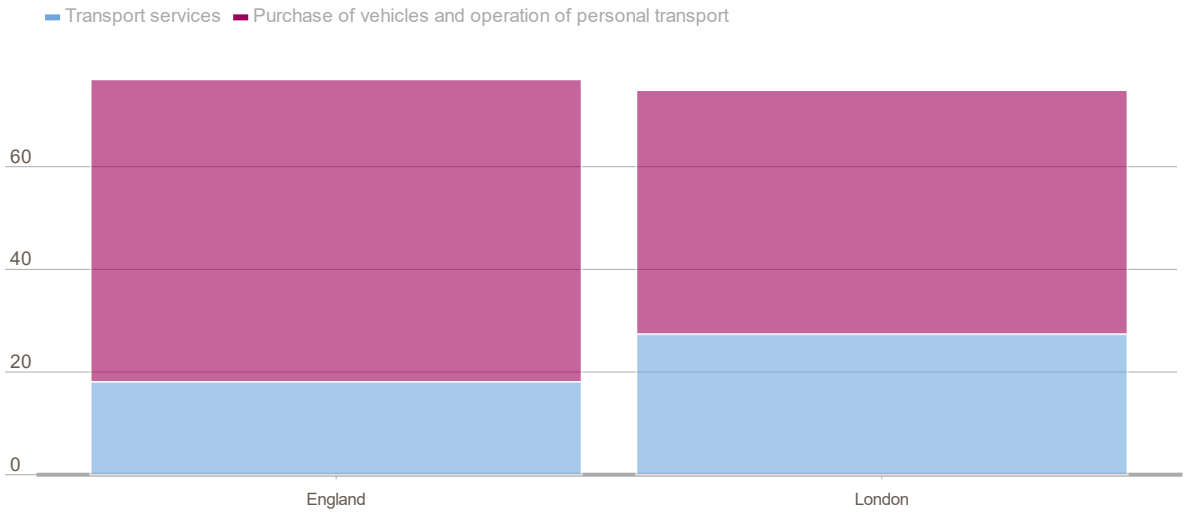
TfL measures progress against this aim by tracking the relative additional journey time that is incurred using only the step-free network against the time required if the whole network was used, for the average of all possible journey combinations in London.

In 2021/22, Nine Elms and Battersea Power Station opened with step-free access as part of the Northern Line Extension. Other London Underground stations that were made step free were Debden, Ealing Broadway, Harrow-on-the-Hill, Ickenham, Osterley, Sudbury Hill, Whitechapel and Wimbledon Park.

The average additional journey time required to make a journey using only the step-free network, has decreased by 32% from 9.5 minutes in 2016 to 6.4 minutes in 2022. The average additional journey time in 2022 has also decreased by 10% compared to 2021.

Figure 7: Transport affordability

Household expenditure on transport, £



Source: Living Costs and Food Survey

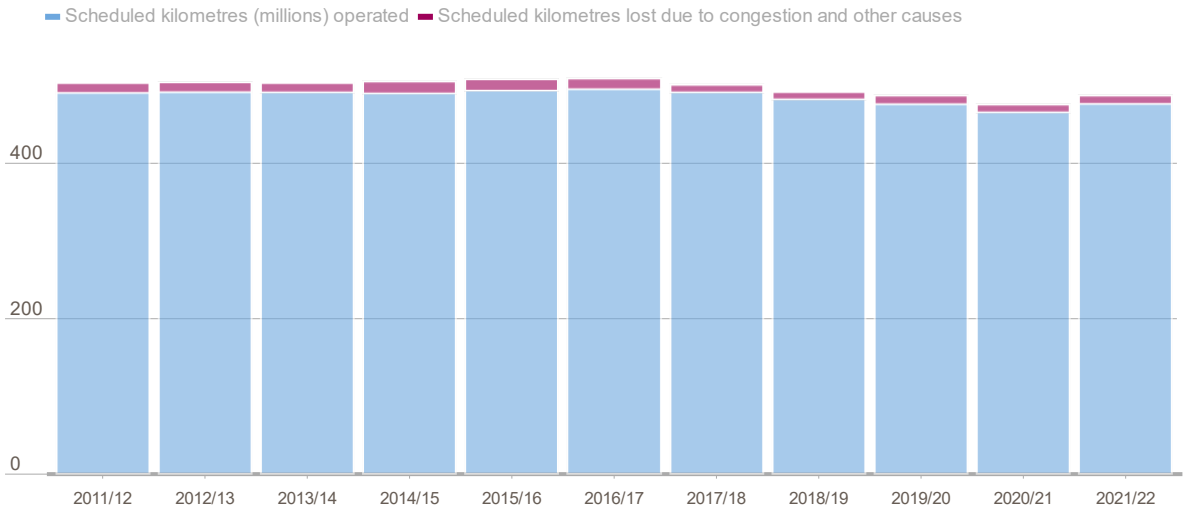
The latest household expenditure data from the ONS for 2021 shows that Londoners spend £27 per week on public transport (£18 is the England average), by far the highest of any region in the UK. It's also the highest proportion of all household expenditure (4.1%) vs 3.2% in England. However, the proportion that Londoners spend on public transport has fallen from 4.9% in 2020.

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

Transport quality

Figure 8: Bus service performance

Scheduled kilometres operated, scheduled kilometres lost



Source: TfL (2022) "Travel in London 15".

Bus network performance is monitored by TfL by measuring scheduled kilometres versus kilometres operated, as well as average bus speed.

Scheduled kilometres are defined as the scheduled timetable for that service. Scheduled kilometres may not be met because journeys are cancelled or suspended due to traffic congestion, staff availability, or engineering problems or mechanical breakdown.

The chart above shows scheduled kilometres operated, and scheduled kilometres lost due to congestion or other causes. Prior to the pandemic, bus service provision declined from a high point around 2016. This was due to a rationalisation of services introduced in response to a general fall in demand. In the five years since 2016, the percentage of scheduled kilometres operated averaged 98% compared to 97% in the five years prior.

During the pandemic, bus service provision (scheduled kilometres) fell. However, in the 2021/22 financial year, provision returned to the 2019/20 level but remained below the high point reached in the mid-2010s. The proportion of scheduled kilometres operated dropped slightly from 2020 albeit with a lower share of lost kilometres due to congestion and a slightly larger share due to other reasons.

Bus speeds also saw a small decline from the high point during the pandemic year (where general traffic demand was subdued) but remained higher than in 2019/20.

Figure 9: London Underground service performance, 2010/11-2020/21

Multiple measures of performance, including scheduled and operated kilometres.

Year	Scheduled kilometres (millions)	Operated kilometres (millions)	Scheduled kilometres operated	Average generalised journey time (min)	Excess journey time[1] (min)	Share of excess in generalised journey time
2011/12	74.6	72.4	97.0%	45.1	5.8	12.9%
2012/13	77.5	75.6	97.6%	43.6	5.3	12.1%
2013/14	78.2	76.2	97.5%	43.4	5.2	12.0%
2014/15	82.3	80.3	97.6%	42.3	4.6	11.0%
2015/16	84.5	82.4	97.5%	41.7	4.6	11.0%
2016/17	86.3	83.7	96.9%	41.7	4.7	11.0%
2017/18	87.3	84.3	96.6%	41.6	4.6	11.2%
2018/19	87.8	85.0	96.8%	41.6	4.6	11.0%
2019/20	87.7	82.4	94.0%	41.9[2]	5.0[2]	11.8%[2]
2020/21	83.3	72.6	87.2%	n/a	n/a[3]	n/a[3]
2021/22	84.9	74.9	88.2%	n/a	n/a[3]	n/a[3]

1: Difference between actual journey time and time if services run to time, weighted to reflect how customers value time.
2: Average from financial periods 1 to 12. Period 13 has been excluded because it was impacted by the coronavirus pandemic.
3: While demand remains subdued, it is not possible to compute excess journey time.

Source: TfL (2022) "Travel in London 15".

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

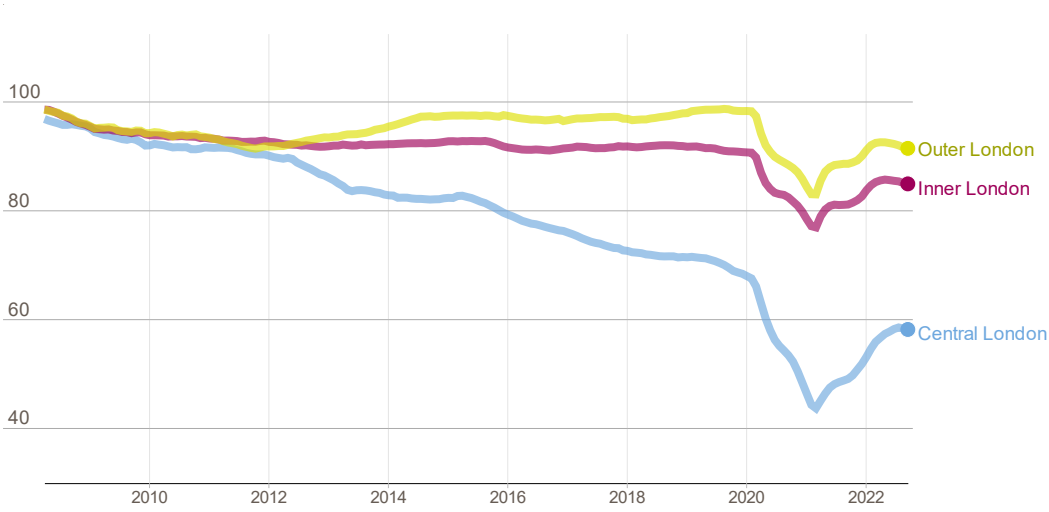
Alongside this growth in supply, the percentage of scheduled kilometres operated improved in the first half of the decade before falling back, albeit still at relatively high levels.

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

Transport efficiency

Figure 10: Road traffic statistics

All motor vehicle traffic flows by area, 13-period rolling average, 2008/09-2022/23. Index: 2006/07=100



Source: TfL. Note: Data shown above is monthly.

The chart above shows the effects of pandemic restrictions in early 2020, with traffic levels dropping across all parts of London, relative to pre-pandemic levels, although the decline was much sharper in central London.

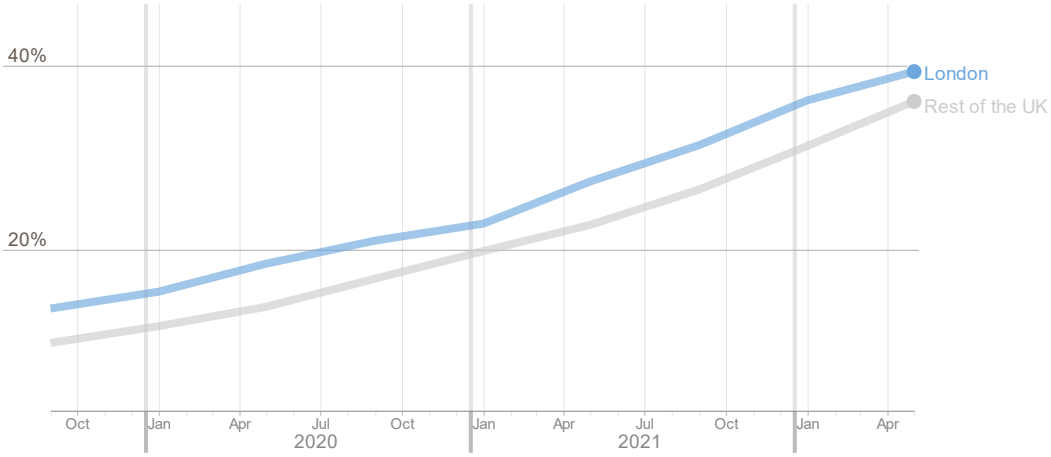
Since then, traffic levels across all of London have increased gradually throughout 2021/22, before starting to level off from April 2022 onwards. Traffic flows in autumn 2022 are around 6 to 7% below pre-pandemic levels[34].

[34] https://content.tfl.gov.uk/travel-in-london-report-15.pdf

Digital Infrastructure

Figure 11: Full Fibre availability

% of premises able to access full fibre



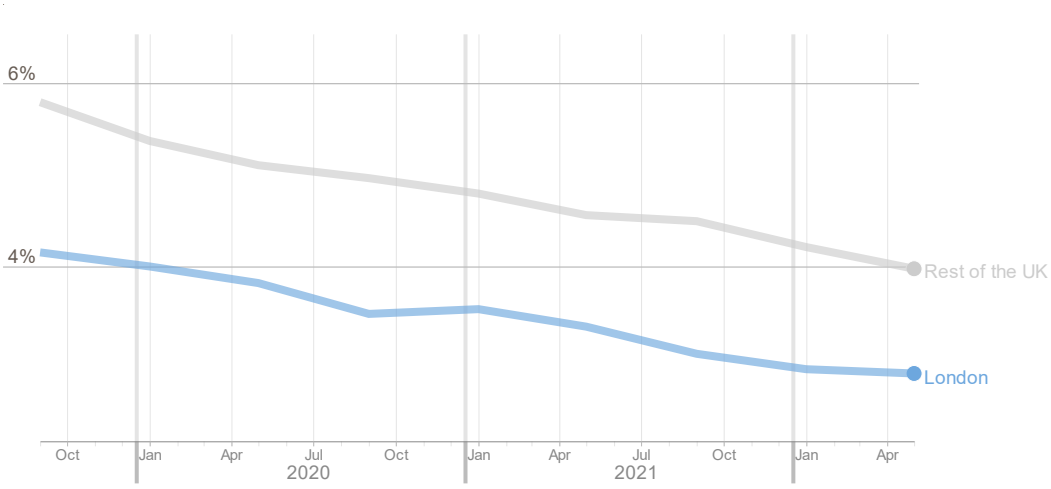
Source: Ofcom

Fibre to the Premises (FTTP) is broadband that uses all fibre optic cabling to connect households to the internet, delivering gigabit capable download speeds (1 Gb/s). This is much faster than Fibre to the Cabinet (FTTC) broadband, which uses fibre optic cable only to a street cabinet then copper for the final connection to a property.

Full fibre broadband was available to 39% (or 1.6m) of premises (business and residential) in London as of May 2022, compared to 36% in the rest of the UK. Between January 2022 and May 2022, 127,000 more premises in London gained access to full fibre.

Figure 12: Superfast broadband unavailability

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



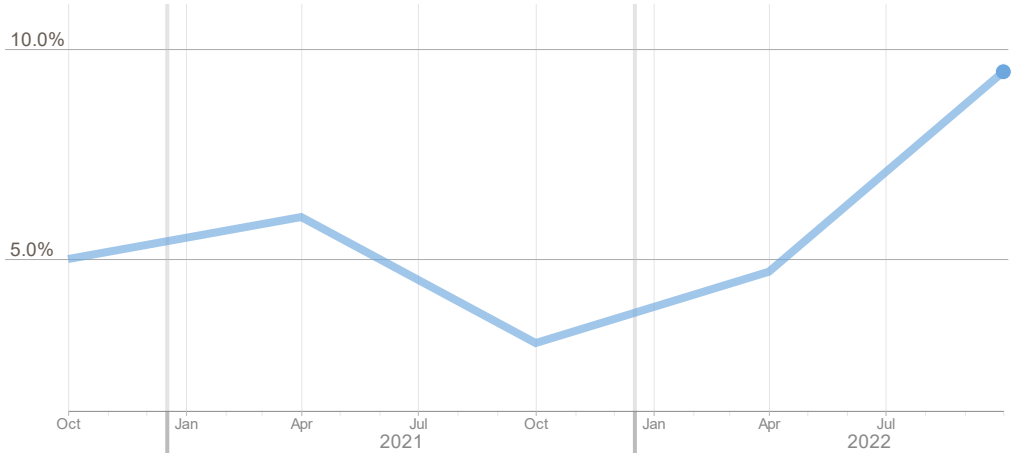
Source: Ofcom

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

In May 2022, just under 3% of London premises were unable to access internet speeds of 30Mbit/s or more, compared to 4% for the rest of the UK. Both London, and the rest of the UK have seen a steady decrease in the % of premises unable to receive 30Mbit/s internet speed as networks have improved.

Figure 13: Broadband affordability

Proportion of all adults 18+ who have experienced any affordability issues with their fixed broadband service in the last month in London



Source: Ofcom

Note: months refer to the following: October 2020 (June 2020 - Oct 2020), April 2020 (Nov 2020 - April 2021), October 2021 (June 2021 - Oct 2021), April 2022 (Dec 2021 - April 2022), October 2022 (July 2022 - October 2022)

The chart above shows the proportion of households that have experienced affordability issues with their broadband over time. This measure has been collected by Ofcom since the start of the pandemic when access to the internet became more important and some people were struggling financially.

Affordability issues could include: cancelling a service because they could no longer afford it; making changes to an existing service; reducing spend on items such as food or clothes to continue paying for communications services; missing a payment or making changes to the way they pay for a service in order to continue to pay.

Over the period from June 2020 until April 2022, the number of adults[35] who experienced affordability issues remained broadly consistent in London at 4%, on

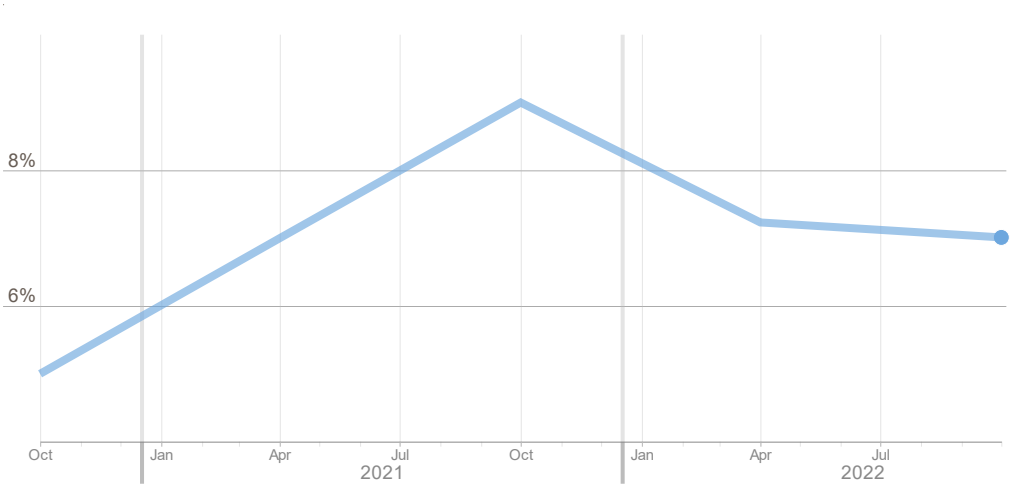
[35] Based on Ofcom sample: All uk adults aged 18+ who make decisions about communication services or non-decision-makers who personally use a mobile phone and own fixed broadband or cancelled fixed broadband in the last month.

average. However, the number of adults reporting affordability issues with fixed broadband in the last month increased to 9% during July 2022 – October 2022.

The households with affordability issues were most likely to make changes to their payment method or tariff, or make changes to their existing service/s in order to afford their fixed broadband service.

Figure 14: Mobile affordability

Proportion of all adults 18+ who have experienced any affordability issues with their mobile in the last month in London



Source: Ofcom

Note: months refer to the following: October 2020 (June 2020 - Oct 2020), April 2020 (Nov 2020 - April 2021), October 2021 (June 2021 - Oct 2021), April 2022 (Dec 2021 - April 2022), October 2022 (July 2022 - October 2022)

The chart above shows the proportion of households that have experienced affordability issues with their mobile phone over time. As with broadband affordability, this metric has been collected by Ofcom since the start of the pandemic. Affordability issues could include cancelling or missing payments for their mobile, making changes to a payment method or tariff with mobile, or making changes to make data or minutes more affordable.

Mobile affordability issues for adults[36] in London peaked in June 2021- October 2021 at 9% and have since declined to around 7% during July 2022-October 2022.

In London, the most common affordability issue in the most recent data, was making changes to a payment method or tariff and cancelling or missing a payment.

[36] Based on Ofcom sample: All UK adults aged 18+ who make decisions about communication services or non-decision-makers who personally use a mobile phone and own a mobile or cancelled a mobile in the last month.

12: YOUNG PEOPLE & EDUCATION

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

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

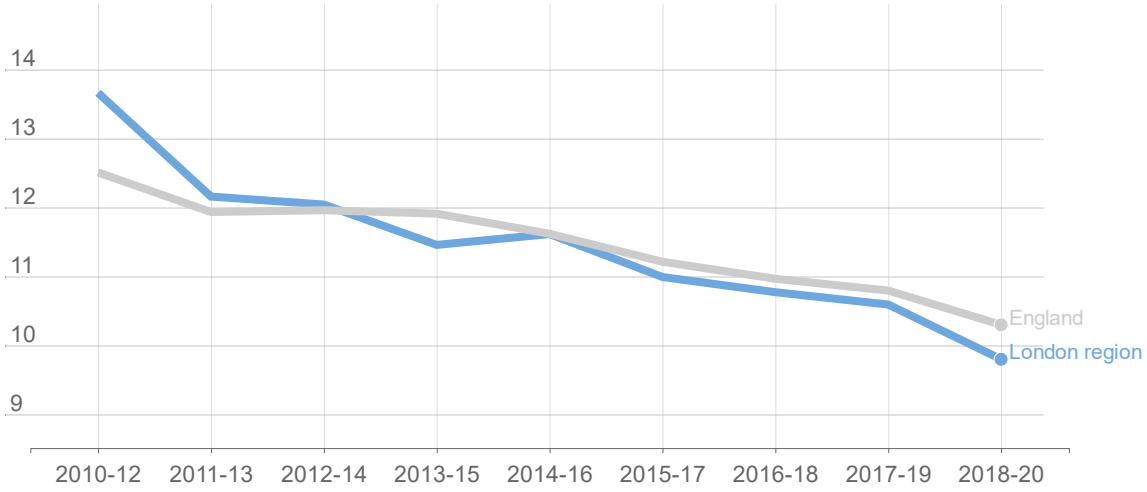
There are several resources readers may wish to consider alongside this chapter notably the London Education Report which covers early years education through to 16-19 education and training.

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

Health and Happiness

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

Child mortality rate per 100,000 between 2010-12 and 2018-20



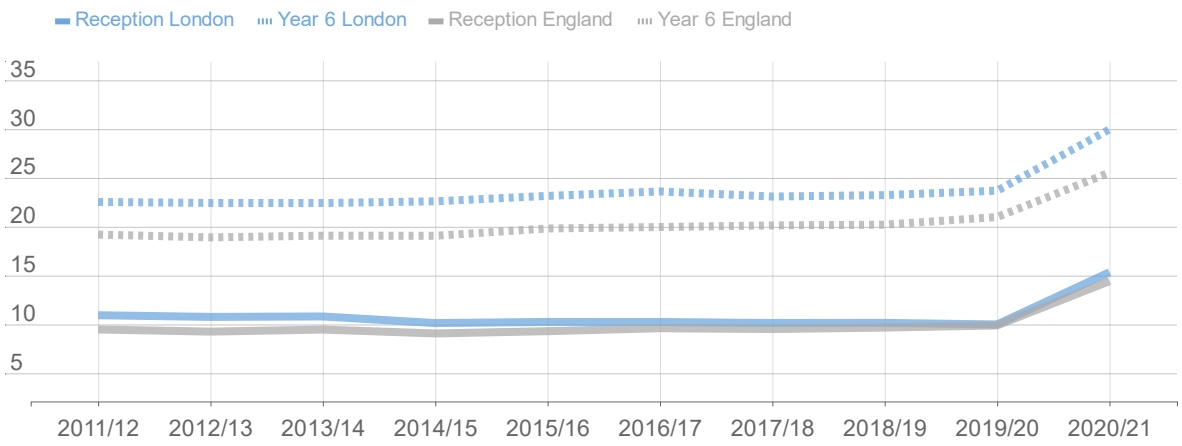
Source: Office for National Statistics (ONS)

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

London's child mortality rate decreased by 3.9 points from 2010-12, compared to a decrease of 2.2 points across England.

Figure 2: Prevalence of obesity

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

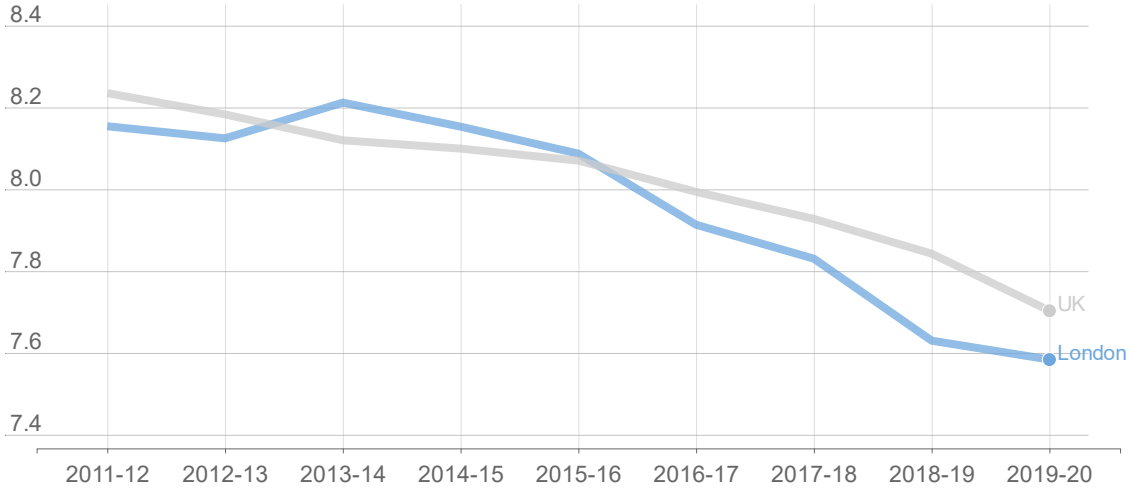


Source: NHS Digital, National Child Measurement Programme

Fifteen per cent of London's reception children are classified as obese, which is in line with the England average of 14%. The prevalence of obesity in year 6 is slightly higher across London than England, at 30% compared to 26%.

Figure 3: Children's happiness with life as a whole

Children's mean happiness score for life as a whole between 2011-12 and 2019-20



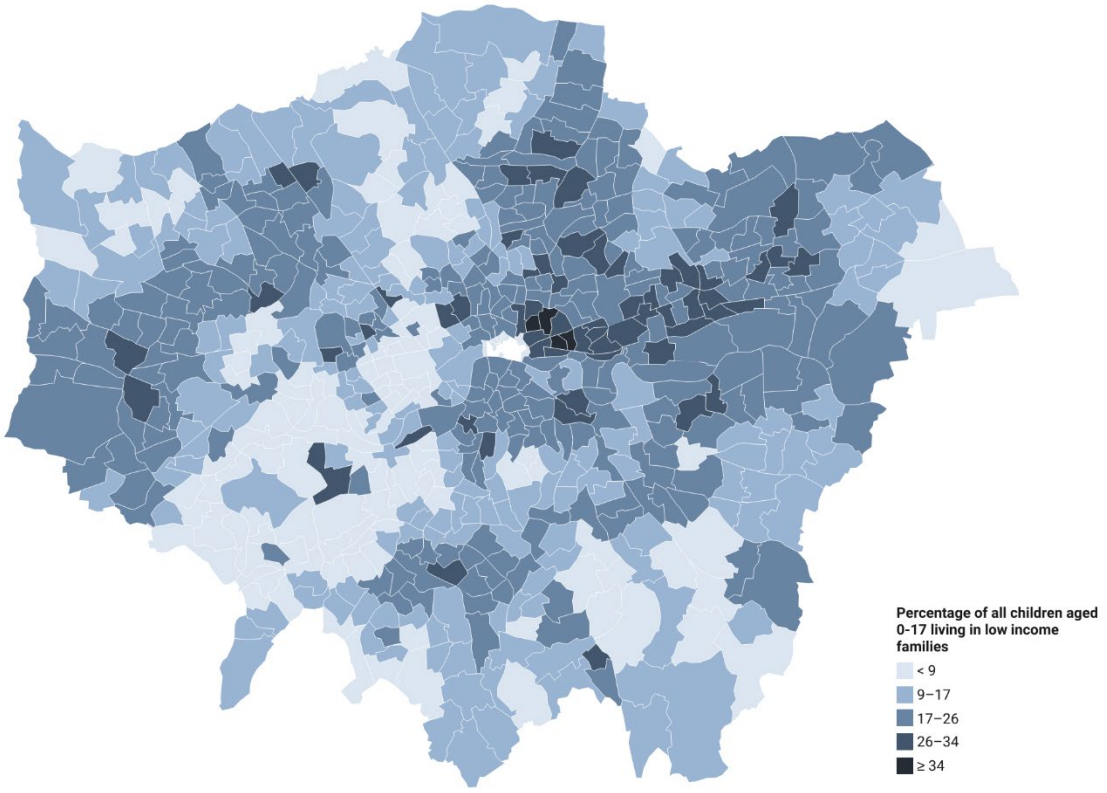
Source: Understanding Society Survey

The Understanding Society survey includes questions for 10 to 15-year olds asking how they feel about life as a whole. Children are presented with a numeric response scale – from completely happy to not happy at all.

Children's mean happiness score in London for life as a whole has decreased from 8.2 in 2011-12 to 7.6 in 2019-20. This is in line with national level data, whereby mean happiness scores for life as a whole deceased from 8.2 in 2011-12 to 7.7 in 2019-20.

Figure 4: Children under 18 living in low income families, 2020/2021

Map showing the percentage of all children aged 0-17 living in low income families across London wards



Source: Children in low income families dataset, DWP, rates calculated as a percentage of GLA ward estimates of 0-17 age group

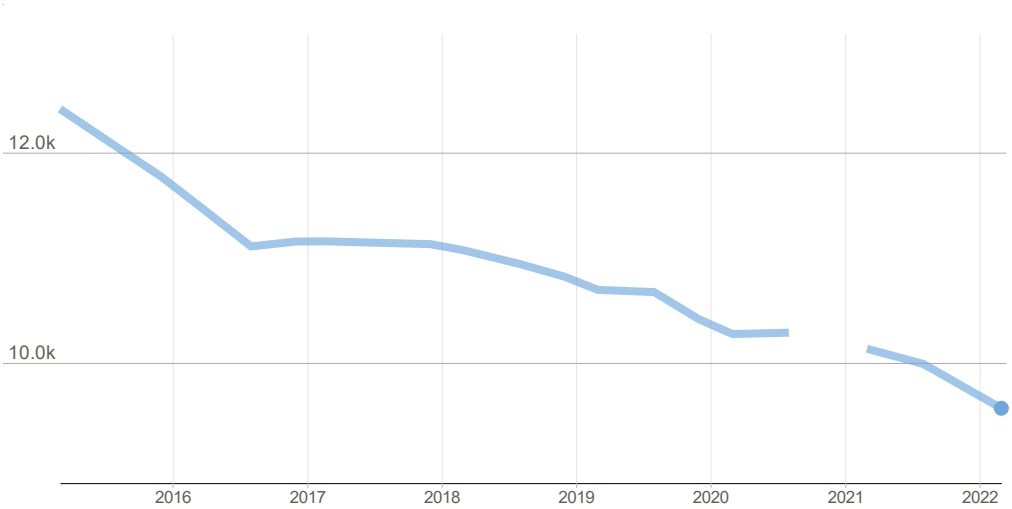
The percentage of children living in low income families varies by ward and London borough. The north east of London has a high concentration of children living in low income families.

Across London, the number of children living in low income families decreased by 9% between 2019/20 and 2020/21 with the uplift to Universal Credit and Working Tax Credit and a lower median income. The total number of children in low income families in London was still higher than in 2017/18.

Early Years

Figure 5: Registered early years providers[37]

Number of registered early years providers across London in March and December between 2015 and 2022[38]



Source: Ofsted

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

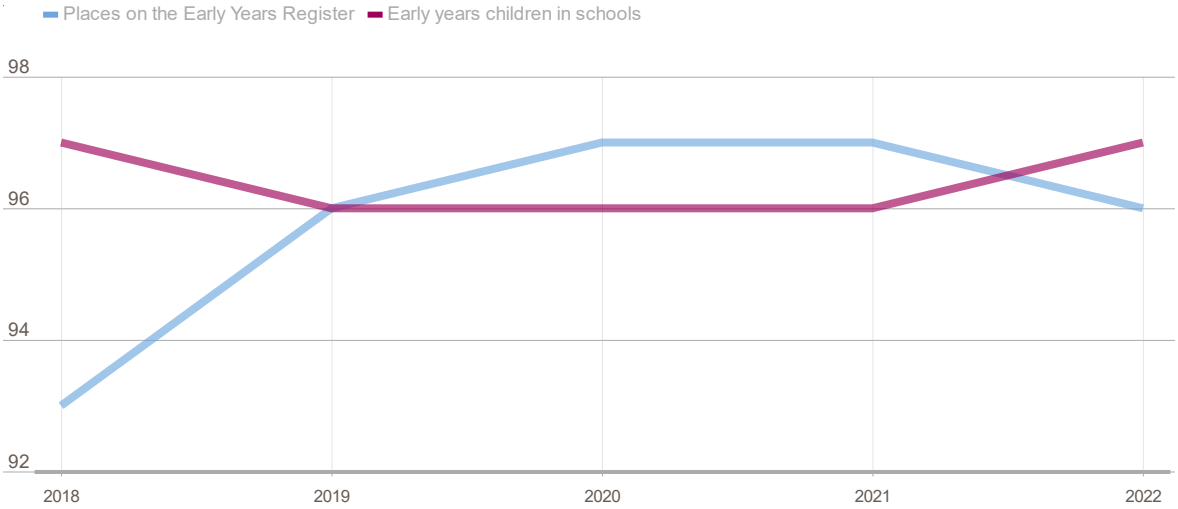
Between 2019 and 2022, there was an 11% decrease in the number of registered early years providers across London from 10,695 to 9,569, compared to a decrease of 14% across England from 61,652 to 53,193.

Since March 2015, there has been a 23% decrease in the number of registered providers across London, compared to a decrease of 28% across England.

[37] 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.
[38] Data was not collected for December 2020 due to COVID-19.

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

The percentage of children and places in 'good' or 'outstanding' settings in London between 2018 and 2022



Source: Department for Education, Ofsted state-funded schools statistics and Ofsted early years and childcare statistics

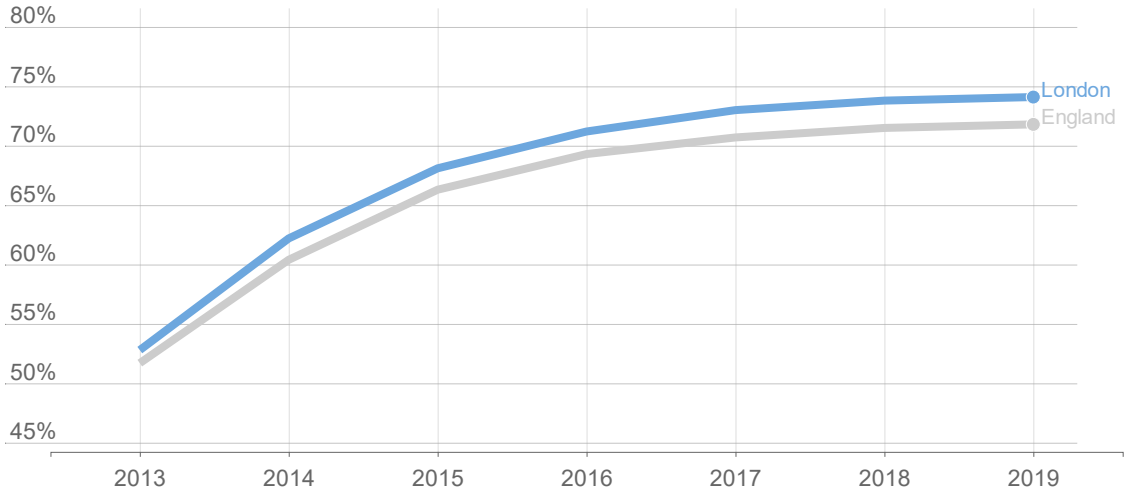
Ninety-seven per cent of early years children in schools attend a setting which is 'good' or 'outstanding'[39].

Ninety-six per cent of places registered on the Early Years Register are in 'good' or 'outstanding' settings, which is an increase of three percentage points from 2018. The proportion in London which are in 'good' or 'outstanding' settings is the same as the rest of England.

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

Figure 7: Good level of development at age five

Percentage of children with a good level of development at age five between 2013 and 2019[40]



Source: Department for Education

Whilst the percentage of children in London with a good level of development[41] at age five has increased from 53% to 74% between 2013 and 2019, it has remained relatively unchanged since 2017 (an increase of 1 percentage point). This is in line with national level data, where the percentage of children in England with a good level of development increased from 52% to 72% between 2013 and 2019 but increased by 1 percentage point from 2017.

Children who are eligible for free school meals (FSM) are less likely to have a good level of development at age 5 compared to those who are not eligible, being 55% compared to 75% respectively. This attainment gap has widened by 7 percentage points since 2013.

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

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

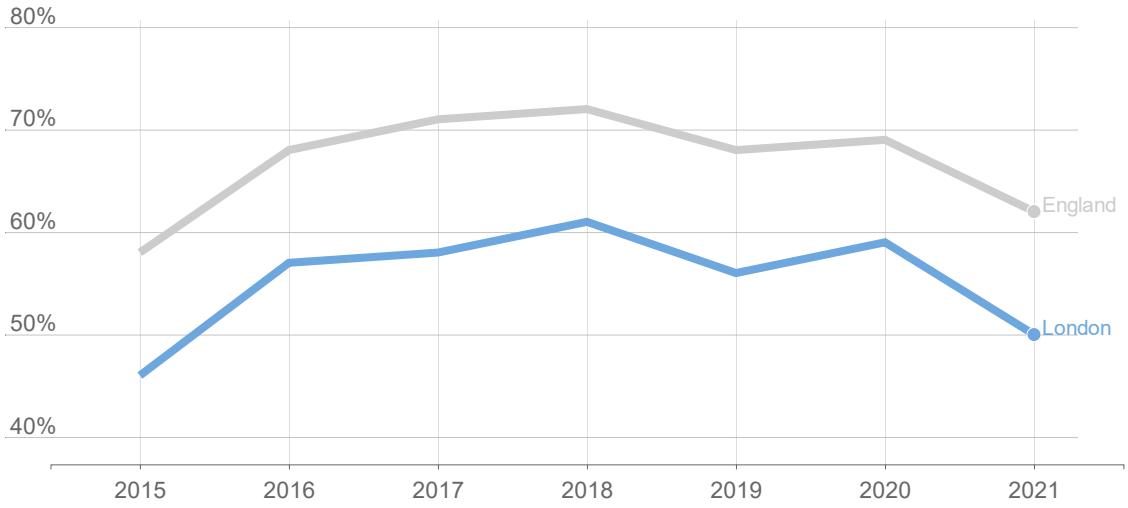
Black children are less likely to have a good level of development at age 5 compared to any other ethnic group, being 70% compared to 82% for the highest achieving

[40] The Early Years Foundation Stage Profile (EYFS) is an assessment of a child's level of development at the age of five. In 2021, the EYFS profile was not mandatory.
[41] The percentage of children with a good level of development is defined as the percentage of children achieving at least the expected level in the prime areas of learning and in the specific areas of literacy and mathematics.

ethnic group (Chinese). This attainment gap, between Chinese children and black children has increased by 11 percentage points since 2013 (see Table 1 above)[42].

Figure 8: Free Early Education Entitlement take up

Percentage of eligible children using at least part of their Free Early Education Entitlement between 2015 and 2021



Source: Department for Education

Only 50% of eligible two-year-olds in London used at least part of their Free Early Education Entitlement (FEEE)[43], which is 12 percentage points lower than the England level, being 62%.

Since COVID-19, there has been a decrease of 6 percentage points in the number of eligible children using their FEEE, from 56% to 50%. This has reversed the upward trend since 2015, where there was an increase of 15 percentage points in the number of eligible children using at least part of their FEEE, from 46% to 61% in 2018.

[42] The change in the attainment gap refers to Chinese and black children since 2013. However, in 2013 and 2014, mixed children were the highest achieving ethnic group (56% and 66% respectively). Black children are the lowest achieving ethnic group across all years.

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

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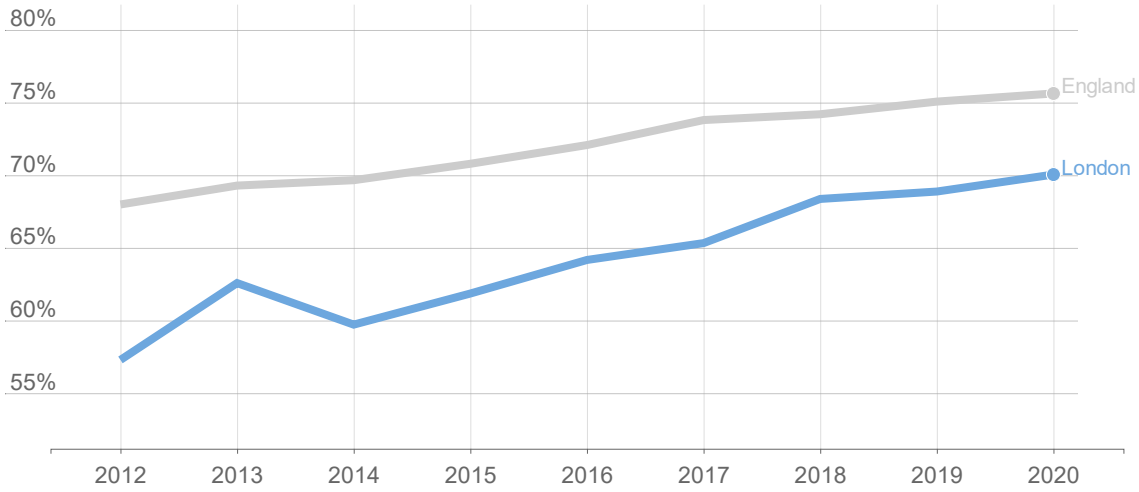
Figure 9: Mothers with dependent children in London who are in paid work

Percentage of mothers with dependent children in London who are in paid work between 2012 and 2020



Source: Office for National Statistics

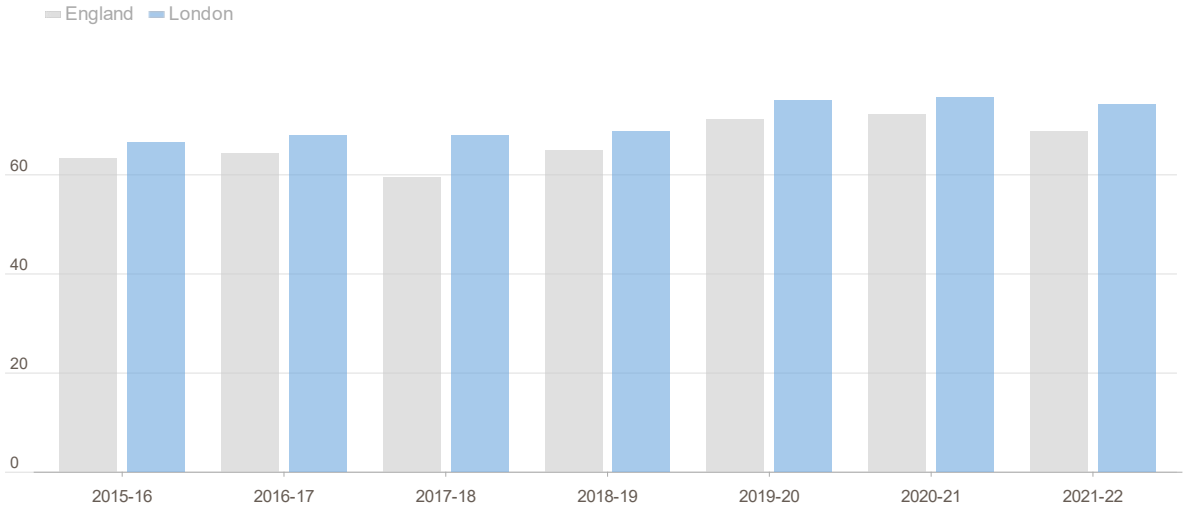
Seventy per cent of mothers with dependent children in London are in paid work, which is lower than the England level of 76%.

The percentage of mothers with dependent children who are in paid work has increased across London by 12 percentage points between 2012 and 2020.

Key Stage 4

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

Percentage of pupils who achieved a standard 9-4 pass in English and Mathematics GCSEs between 2015-16 and 2021-22 (2021-22 data provisional)



Source: Department for Education

London has a higher percentage of pupils achieving a standard 9-4 pass[44] in English and Mathematics compared to England, being 74% compared to 69%.

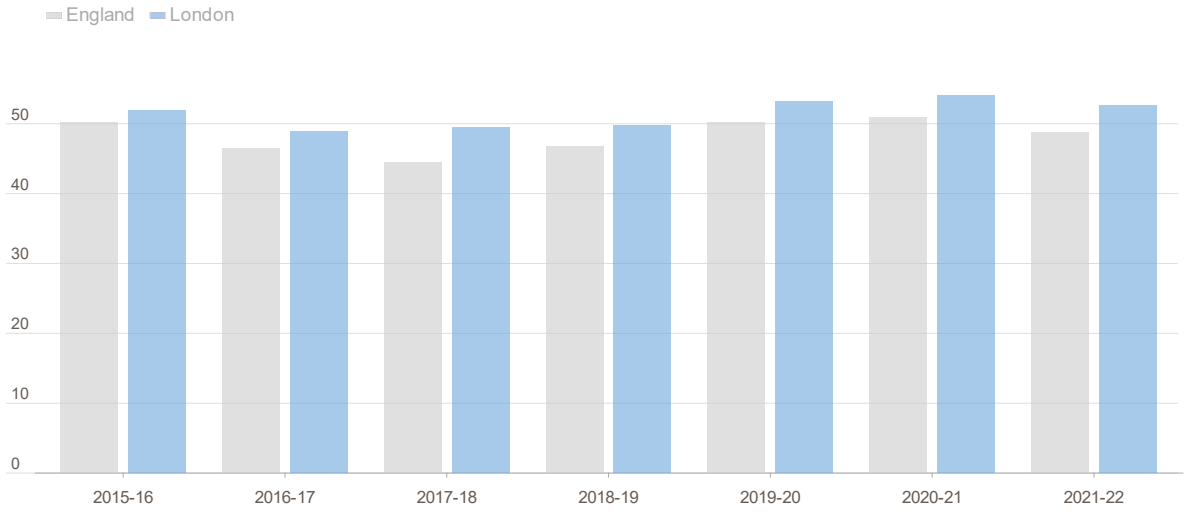
Since 2015-16, the percentage of pupils achieving a standard pass in English and Maths increased across London by 7.7 percentage points (from 66% to 74%), compared to 5.5 percentage points across England (from 63% to 69%).

A lower percentage of black (70%) and mixed pupils (71%) achieve a standard pass in English and Maths compared to any other ethnic group (91% for Chinese pupils, the highest achieving ethnic group).

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

Figure 11: Average Attainment 8 score

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



Source: Department for Education

The average Attainment 8 score[45] in London was 52.6 in 2021-22, which was 3.8 percentage points higher than the England average of 48.8.

Since 2015-16, London's average Attainment 8 score has increased by 0.7 points, from 51.9 to 52.6. The average across England has decreased by 1.3 points in the same period, from 50.1 to 48.8.

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

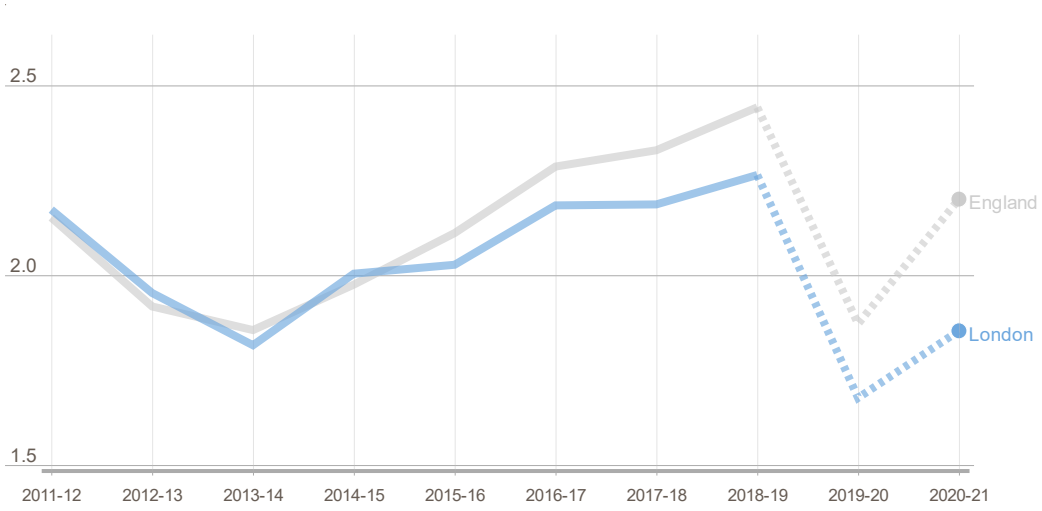
[44] The highest grade that can be achieved is 9 (this is equivalent to an A* under the old grading system) and a 4 is a standard pass (this is equivalent to a grade C at GCSE under the old grading system).
[45] The average attainment 8 score measures pupils' results in 8 GCSE-level qualifications across various core and optional elements.

The gap in the average Attainment 8 score between pupils on free school meals (FSM) and pupils who are not eligible has increased from 8.8 points in 2015-16 to 11.8 points in 2021-22.

Across all characteristics from ethnicity to FSM status children in London perform better than those with the same characteristics across the rest of the country.

Figure 12: Fixed-term exclusion rate

The fixed-term exclusion rate[46] for pupils with at least one fixed term exclusion in the academic year in London and England between 2011-12 and 2020-21



Source: Department for Education

The fixed-term exclusion (FTE) rate in London for pupils with at least one FTE in the academic year increased from 1.82 in 2013-14 to 2.26 in 2018-19. The latest data for 2020-21 shows that the FTE rate (1.85) is still below pre-pandemic levels. The data analysis below for school exclusions uses the last year of uninterrupted learning – 2018-19.

Special schools have experienced a decrease in their FTE rate, from 5.35 in 2013-14 to 4.13 in 2018-19.

Black pupils continue to experience a higher FTE rate than any other ethnic group, being 3.82 in 2018-19 compared 1.07 for the ethnic group with the lowest rate (Asian).

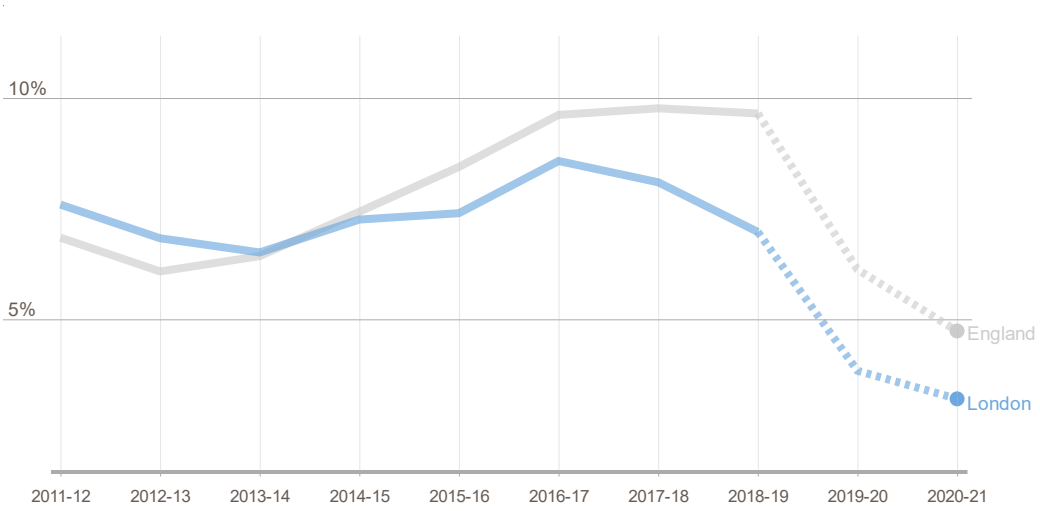
Pupils eligible for FSM continue to experience a higher FTE rate than pupils who are not eligible, being 4.43 compared to 1.81 respectively.

Pupils with Special Educational Needs (SEN) have a higher fixed term exclusion rate than those without SEN, being 5.3 compared with 1.8 respectively.

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

Figure 13: Permanent exclusion rate across all schools

The permanent exclusion rate[47] across all schools in London and England between 2011-12 and 2020-21



Source: Department for Education

Between 2016/17 and 2019/19, the permanent exclusion rate in London has decreased from 0.09 to 0.07. During the same time period, the national exclusion rate has remained constant at 0.10. Later data show a large fall but have been affected by interrupted learning during the pandemic. The latest data for 2020-21 shows a permanent exclusion rate (0.03) for London. The data analysis below for school exclusions uses the last year of uninterrupted learning – 2018-19.

Between 2011-12 and 2018-19, pupils eligible for FSM experienced a higher permanent exclusion rate than pupils not eligible for free school meals, being 0.17 compared to 0.05 respectively.

Black pupils experienced a higher permanent exclusion rate than any other ethnic group, being 0.12 compared to 0.03 for the ethnic group with the lowest exclusion rate (Asian).

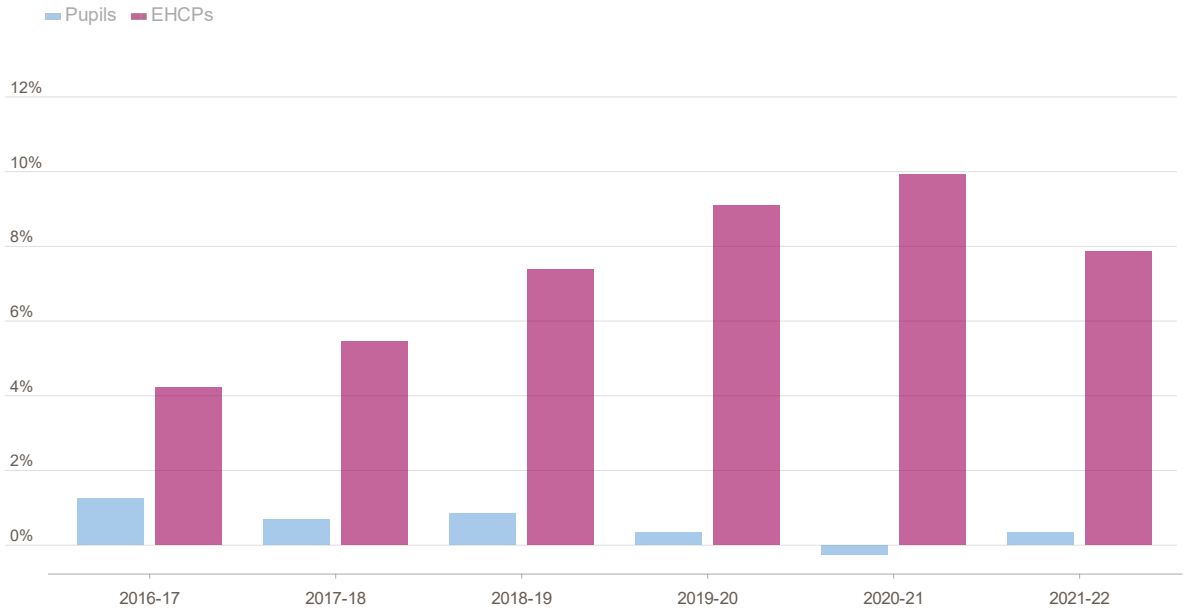
Pupils with SEN have a higher permanent exclusion rate than pupils without SEN, being 0.19 compared to 0.05 respectively.

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

Special Educational Needs and Disabilities

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

Annual change in the number of pupils with an EHC plan or statement of SEN and the number of pupils in London between 2016-17 and 2021-22



Source: Department for Education

The number of pupils in London with an Education, Health and Care (EHC) plan or statement of SEN[48] increased by 7.9% between 2020-20 and 2021-22, compared to the pupil population, which increased by 0.3%.

Between 2020-21 and 2021-22, the number of primary school pupils with an EHC plan or statement of SEN increased by 7%, compared to a decrease of 1% across the pupil population.

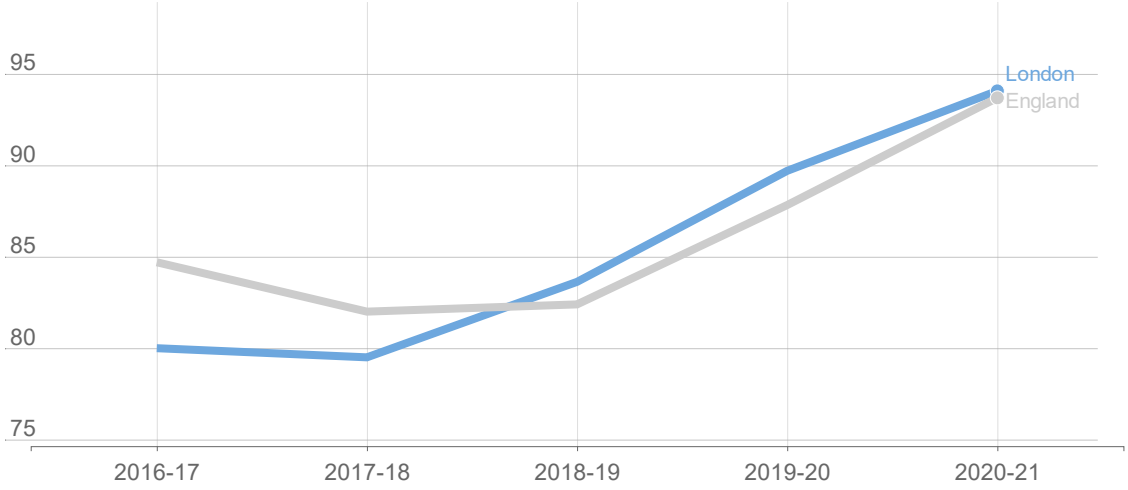
The number of pupils with an EHC plan or statement of SEN across secondary schools increased by 10% between 2019-20 and 2020-21, compared to the pupil population which increased by 2%.

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

Post Key Stage 4

Figure 15: Achievement of at least 2 substantial level 3 qualifications

Percentage of students achieving at least two substantial level 3 qualifications in London and England between 2016-17 and 2020-21



Source: Department for Education

Ninety-four per cent of pupils across London achieved at least two substantial level 3 qualifications[49] in 2020-21, which is in line with England level data.

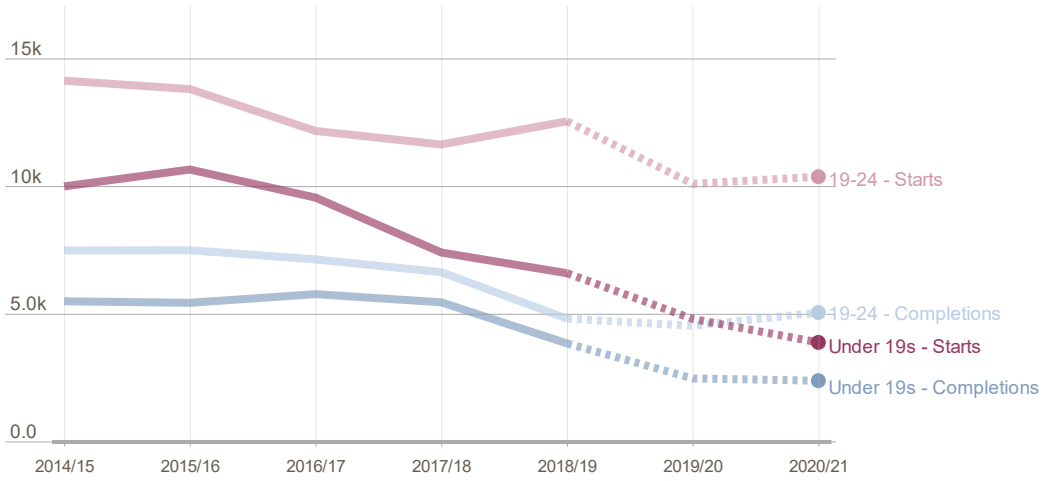
In comparison to 2016-17, the number of pupils attaining at least two substantial level 3 qualifications increased by 14 percentage points, higher than the national increase of 9 percentage points.

Eighty-eight per cent of pupils with an EHC plan or statement of SEN achieved at least 2 substantial level 3 qualifications, compared to 95% of pupils with no identified SEN. This attainment gap, however, has closed from 12 percentage points in 2018-19 to 7 percentage points in 2020-21.

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

Figure 16: Apprenticeship programme starts and completions

The number of apprenticeship programme starts and completions in London for under 19s and 19-24 year olds between 2014/15 and 2020/21[50]



Source: Department for Education

Since 2014/15, the number of Londoners under the age of 19 starting and completing an apprenticeship programme decreased by 61% and 57% respectively.

Since 2014/15, the number of Londoners aged 19-24 starting and completing an apprenticeship programme decreased by 27% and 32% respectively.

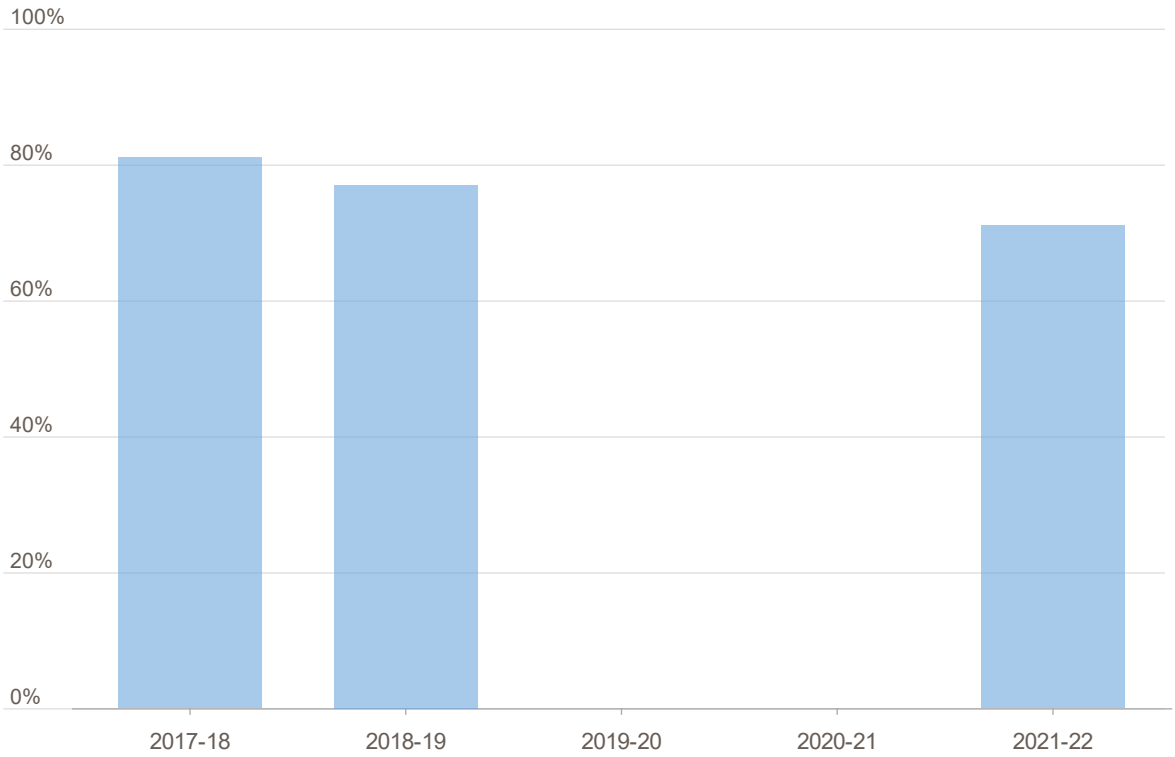
However, over the last year i.e. since 2019/20, there has been an increase in the number of Londoners aged 19-24 starting and completing an apprenticeship programme (3% and 11% respectively).

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

Safety

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

Percentage of Londoners who agreed that their local area is a safe place for children and young people to grow up between 2017-18 and 2021-22[51]



Source: Public Attitudes Survey, MOPAC

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

Londoners aged 16-24, were least likely to think their local area was a safe place for children and young people to grow up, with 65% agreeing compared to 83% of Londoners aged 65+.

Londoners from BAME communities were less likely to agree that their local area was a safe place for children and young people to grow up in (ranging between 64 and 67 per cent), compared to 75% of White British Londoners (the highest reporting ethnic group).

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

13: HEALTH, WELLBEING & INEQUALITIES

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

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

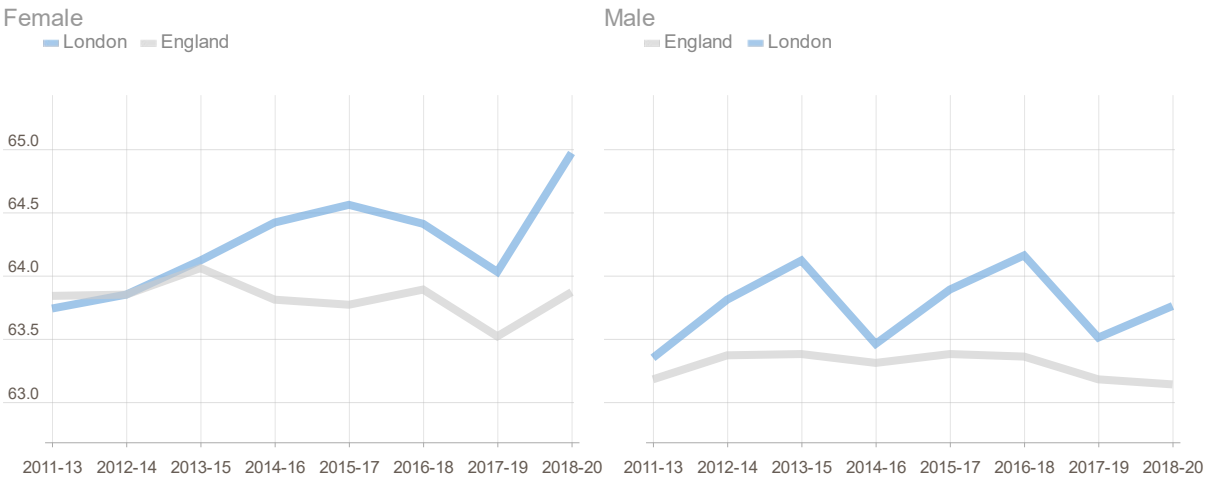
The COVID-19 pandemic reshaped the lives of London's population, and disclosed and magnified the health inequalities related to the different circumstances of our lives. We include a selection of indicators that illustrate patterns of mortality, morbidity and the impact of COVID-19; show pre-pandemic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

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

Life expectancy, mortality and inequalities

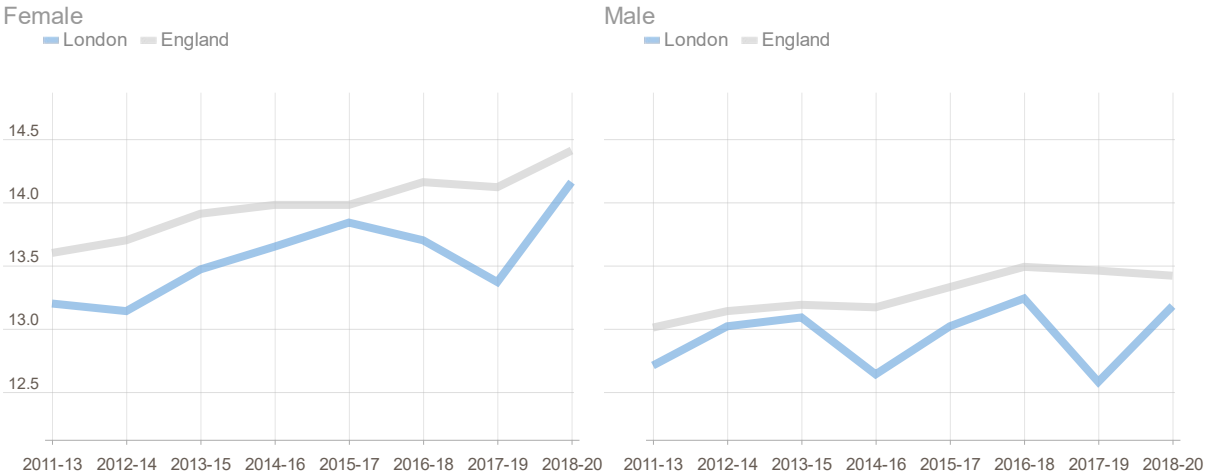
Healthy life expectancy (HLE, an estimate of lifetime spent in "Very good" or "Good" health based on how individuals perceive their general health) is a key summary measure of population health. The overall London values are higher than the national average for both males and females, as shown in Figure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

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



Source: Office for National Statistics (ONS)

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

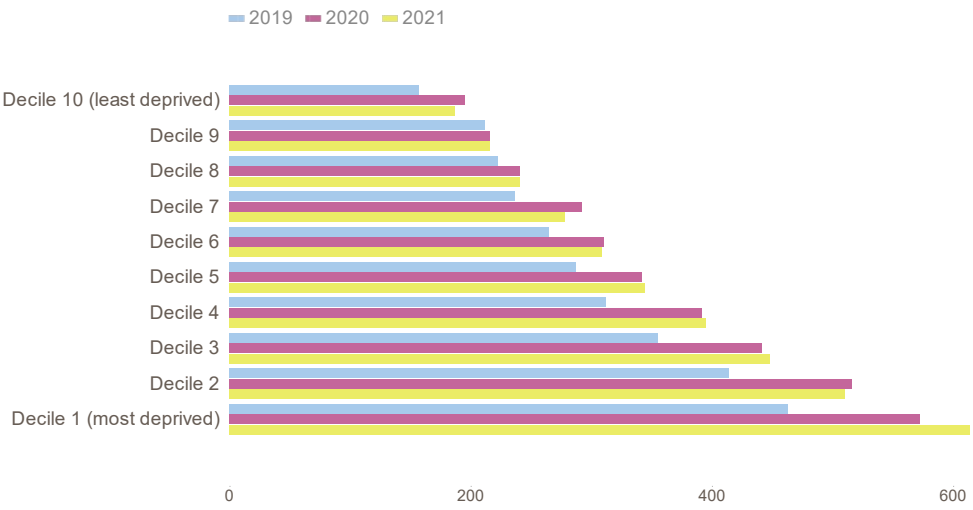


Source: Office for National Statistics (ONS)

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

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

Under 75-year all-cause age-standardised mortality rate per 100,000 population

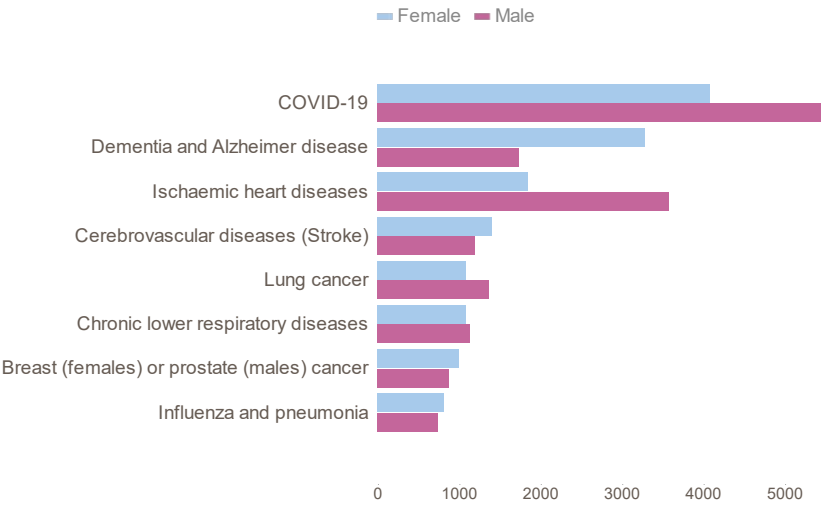


Source: OHID Health Profile for London Report

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

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

Number of deaths in people aged over 20 years



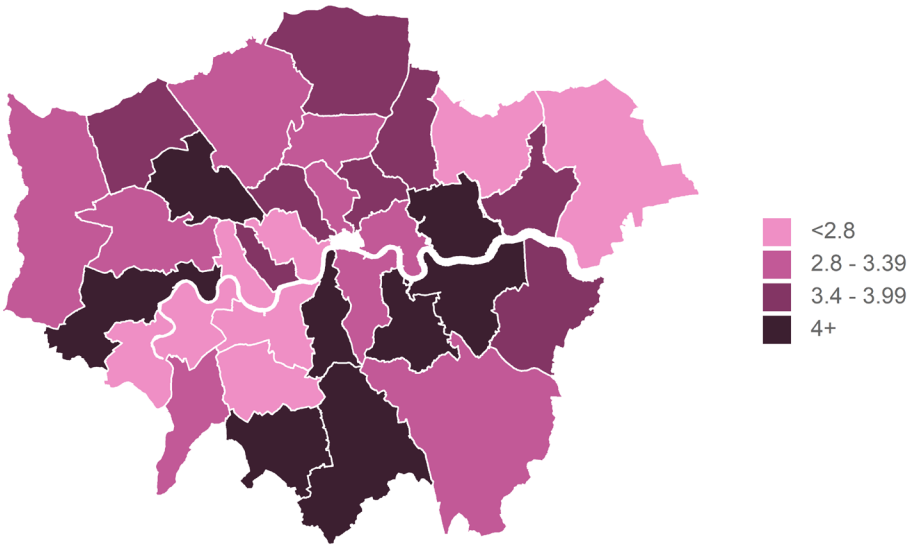
Source: Office for National Statistics (via Nomis)

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

Figure 4 shows that in London in 2021, the main cause of adult death in both men and women was COVID-19, with Dementia and Alzheimer disease as the second main cause for women, and ischaemic heart disease (IHD) as the second main cause for men. For both males and females between the ages of 20 and 34 years there were more deaths due to suicide than to COVID-19. Across England, cancer was the cause of death associated with the highest number of years of life lost, as shown by data from the Wider Impacts of COVID-19 tool (OHID). Except for the two recent years affected by COVID-19, since 2001 IHD has consistently been the leading cause of death for males in London and England. Mortality rates for IHD, cerebrovascular diseases, chronic lower respiratory diseases and cancer have all declined over this period, while rates for deaths resulting from dementia and Alzheimer disease have steadily increased. For females, dementia and Alzheimer disease overtook IHD as the leading cause of death in 2012.

Figure 5: Infant mortality rate by London borough (2018-20)

Infant deaths under 1 year of age per 1000 live births



Source: OHID Public Health Outcomes Framework Data for City of London were combined with those for Hackney.

The indicator of Infant Mortality Rate reflects the overall health of a society, as well as maternal and infant health. The most recent data show the London rate is lower than for England as a whole, at 3.4 per 1000 live births compared to 3.9, but the rate greatly varies between boroughs, as shown in Figure 5, being greater than 4.5 in Hounslow and Greenwich and under 2 in Wandsworth. The London rate decreased from 5.7 in 2001-03 to 3.2 in 2014–16 and has gradually increased since then.

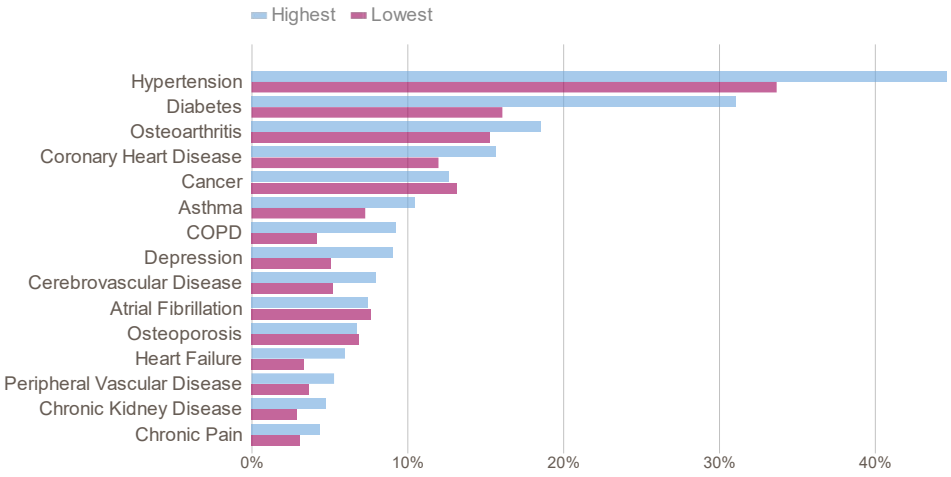
Inequalities in morbidity

A useful measure of poor-health is “Years lived with disability” (YLD), which combines the prevalence of each condition with a rating of the severity of symptoms. By this measure, according to the Global Burden of Disease Study the leading causes of illness for females in London in 2019 were Low back pain (1251), Headache disorders (934) and Depressive disorders (830), and for males were Low

back pain (917), Diabetes (704) and Depressive disorders (614) (values are for age-standardised YLDs per 100,000 population). More recent data (April 2020 – March 2021) from GP practices from the NHS Quality and Outcomes Framework) shows prevalence rates in London were lower than national rates for all conditions except Mental Health.

Figure 6: Prevalence of common diseases in older adults in London, by most and least deprived quintiles, June 2021

Prevalence of disease in people aged 65 – 84 years

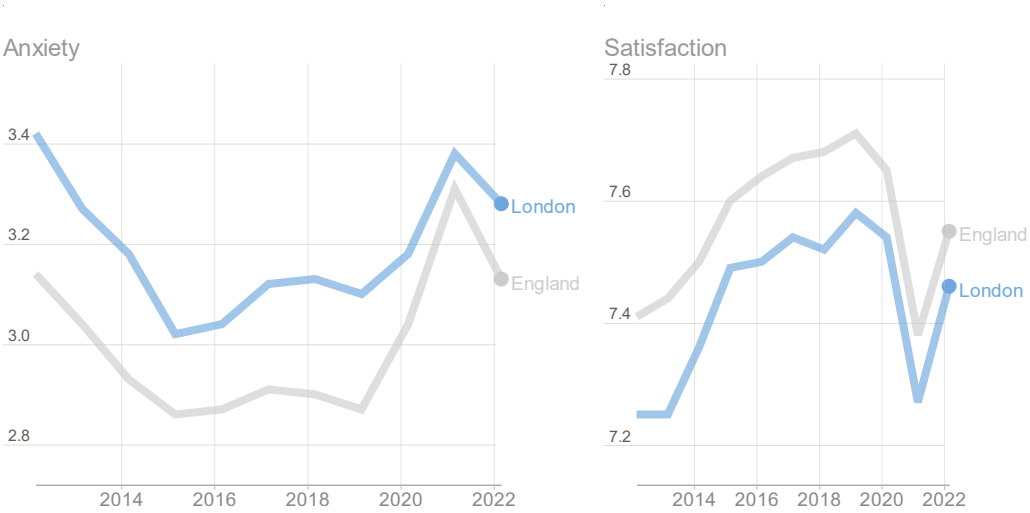


Source: NHS Segmentation Model

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

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

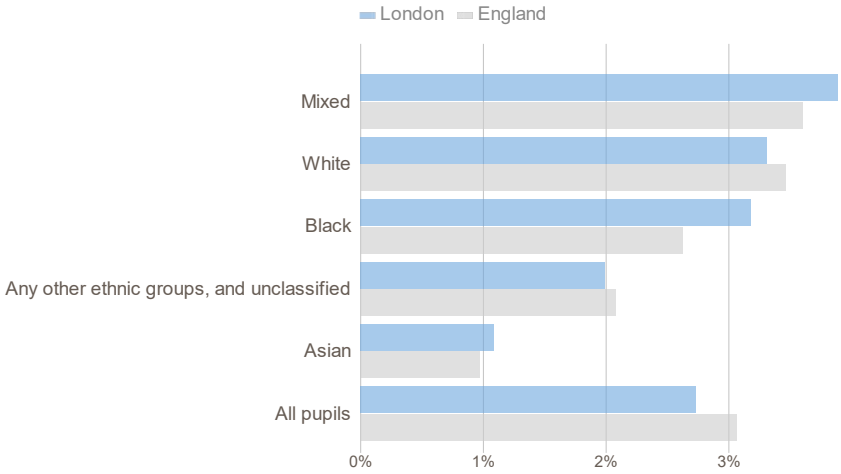
Mean responses on a scale from 0-10 to “Overall, how anxious did you feel yesterday”, and "Overall, how satisfied are you with your life nowadays?”



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

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

Figure 8: Percentage of school pupils categorised by ethnicity, with social, emotional and mental health needs, in London and England (2021/22)



Source: Department of Education Data in the chart includes state-funded nursery, primary, secondary and special schools, non-maintained special schools and pupil referral units

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

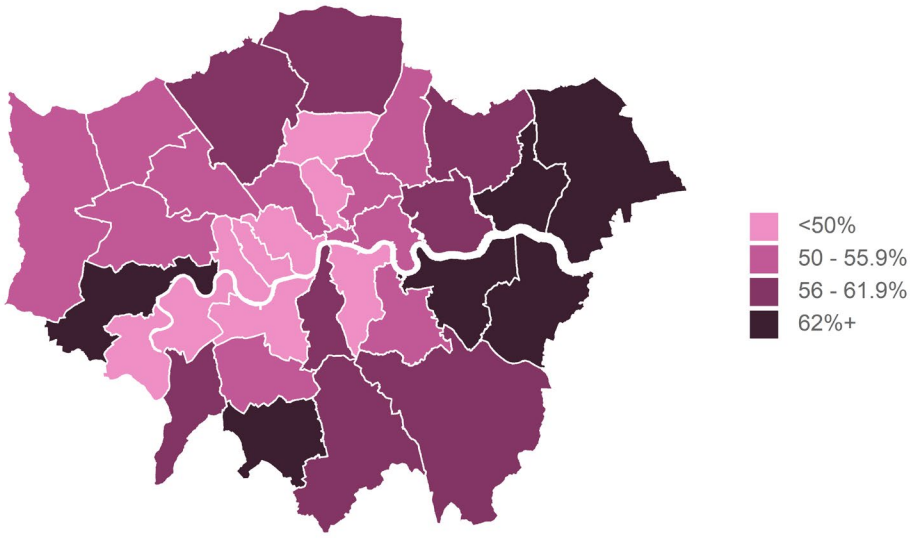
Figure 8 shows that within London, children and young people from White, Black and Mixed ethnic groups are over-represented in the SEMH group compared to the overall pupil group, while those of Asian and other ethnicity are under-represented in the SEMH group. The equivalent proportions across England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

Behavioural risk factors and inequalities

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

Figure 9: Percentage of adults classified as overweight/obese by London borough (2020/21)

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



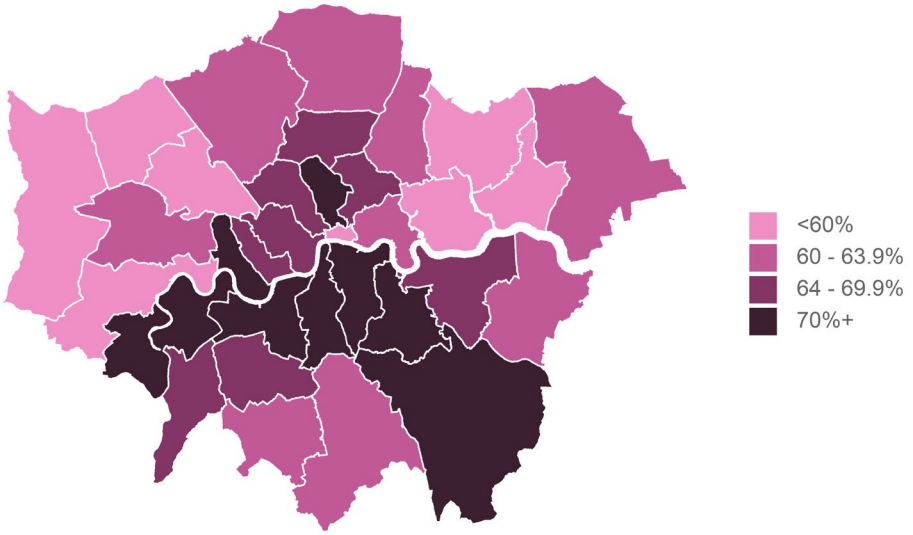
Source: OHID Public Health Outcomes Framework (based on Active Lives Adult Survey, Sport England)

Across London in 2020/21 more than half (56.0%) of adults were overweight or obese. The rate has been this high since 2015 and has been consistently slightly lower than the national rate. Demographic variation in London is expected to follow the national pattern of being higher in males than females, reaching a peak for the age groups falling between 55 and 84 years (local disaggregated data are not

available). Figure 9 shows that the boroughs with the highest rates are concentrated in the east, with the highest rate in Havering (68%) and the lowest in Islington (44%). Child obesity data were described in the Young People and Education Chapter.

Figure 10: Percentage of physically active adults by London borough (2020/21)

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

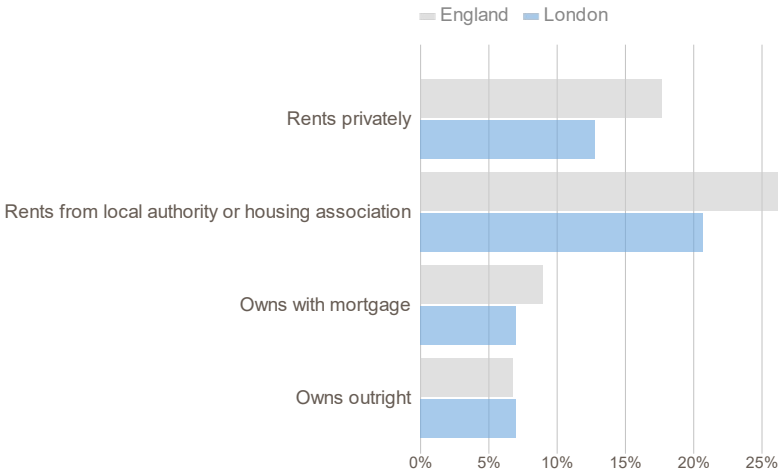


Source: OHID Public Health Outcomes Framework (based on the Active Lives Adult Survey, Sport England)

Figure 10 shows a different distribution for physical activity, whereby the boroughs with the highest rates are mostly south of the river, with 76% of adults aged 19+ years having desirable levels of activity in Wandsworth, and the City of London having the lowest rate at 49%.

Figure 11: Smoking prevalence in adults in London by housing tenure (2020)

Prevalence of current smoking among persons aged 18 years and over (2020 definition)



Source: OHID Public health profiles (based on the Annual Population Survey)

Smoking is the most important cause of preventable ill health and premature mortality in the UK. Smoking prevalence in London has decreased by about a third between 2011 and 2019 but significant inequalities remain, with rates higher in deprived areas, for those with mental illness, and for those with routine and manual occupations. Figure 11 shows the significant variation between population groups disaggregated by housing tenure as a proxy for deprivation. The figure also shows the overall smoking rate for London being lower than for England as a whole.

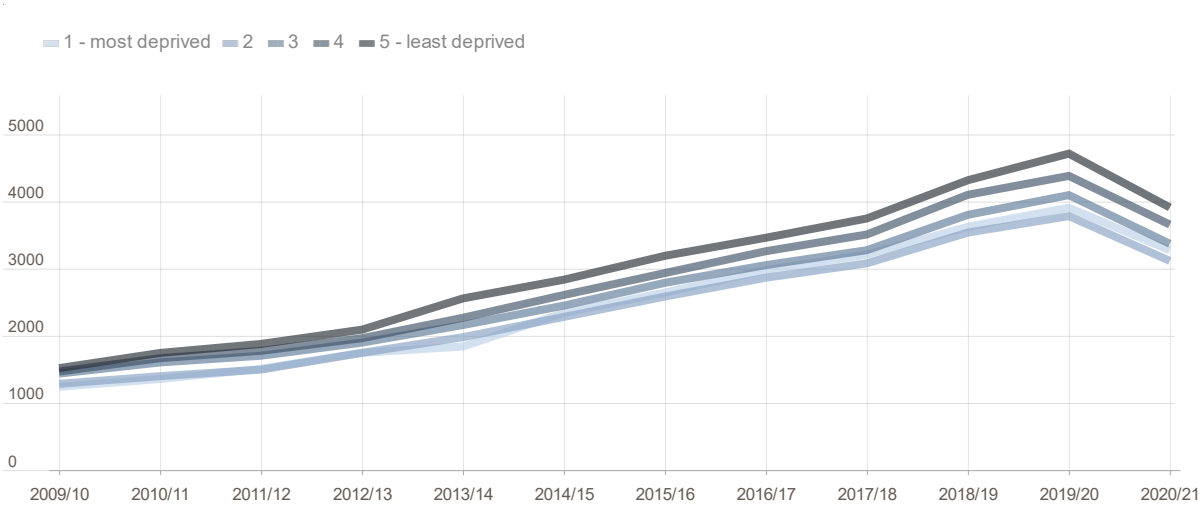
For alcohol consumption, the values for London in 2020/21 of the alcohol-related hospital admissions rate from NHS Hospital Episode Statistics expose the difference between the genders in the impact of alcohol on their health (2280/100,000 for males and 670/100,000 for females). This indicator's values were higher in 2019/20 (2930 and 840 respectively) and the fall likely relates to a 'lockdown effect' during the COVID-19 pandemic whereby people avoided using hospitals both to ease pressure on the NHS, and to minimise the perceived risk of catching COVID-19.

Healthcare inequalities

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

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

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



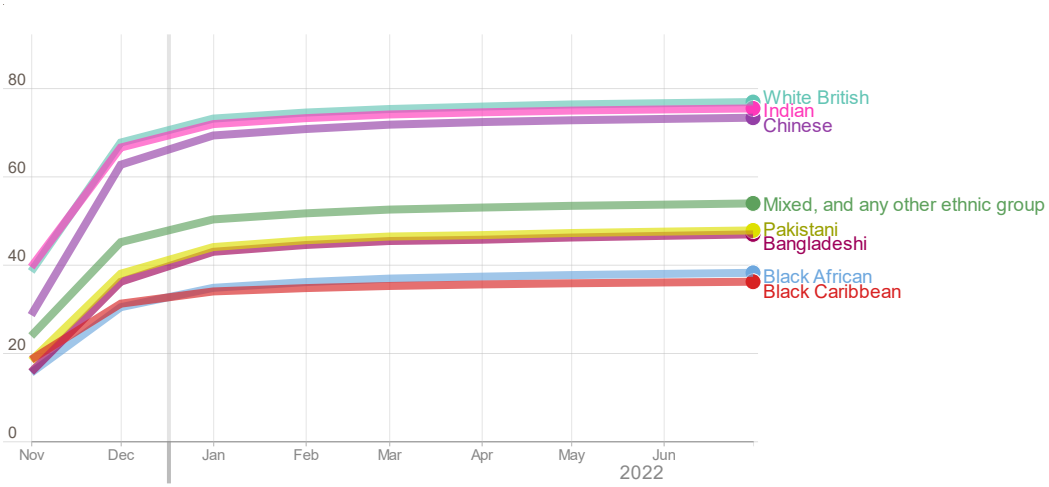
Source: NHS National Cancer Registration and Analysis Service

Figure 12 shows how the rate of urgent suspected cancer referrals (used to refer patients with potential cancer symptoms to secondary care for investigation and possible diagnosis) has increased in London over the past decade. There is significant inequality in this rate between deprivation quintiles that has remained nearly constant over this period, with around 80% greater referral rate for the least

deprived compared to the most deprived quintile. The pattern reflects the "Inverse Care Law" whereby those who most need medical care are often least likely to receive it. The higher rates in the most deprived group shown above implies that for this population, more cancers may be diagnosed through the emergency route, and as such are more likely to be at a more advanced stage. Figure 12 also shows the impact of the COVID-19 pandemic on provision of health services, with a sharp reduction in referral rates between 2019/20 and 2020/21.

Figure 13: Percentage of adults who have received three COVID-19 vaccinations in London, by ethnic group, November 2020 – July 2022

Cumulative percentage of adults (18+ years) who have received three COVID vaccinations

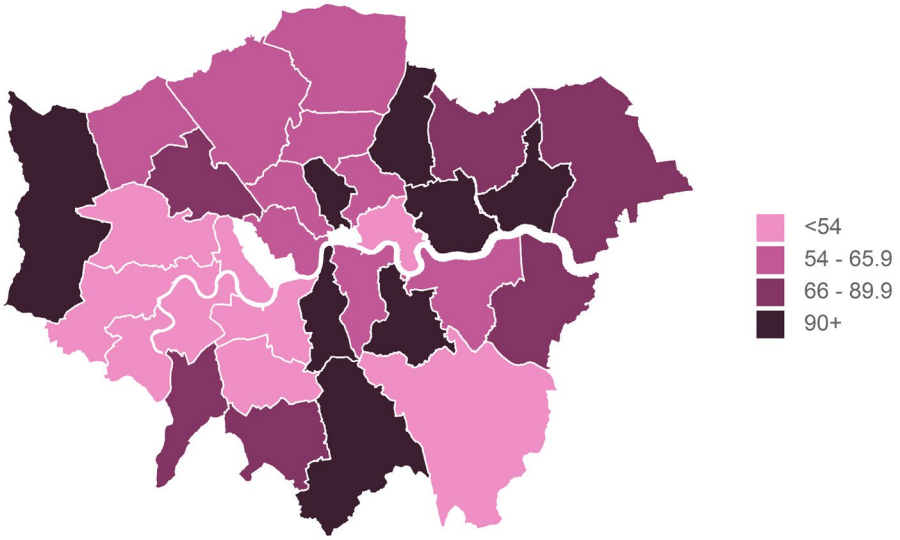


Source: COVID-19 Health Inequalities Monitoring for England (CHIME) tool

Figure 13 shows how the prevalence of full COVID-19 vaccination varied between ethnic groups by the end of July 2022. Although the absolute rates shown on the figure are not completely reliable (due to challenges in selecting a denominator for calculation, and in collection of ethnicity data), it is certain that there was wide variation between ethnic groups.

Figure 14: Hospital admissions for asthma (< 19 years) by London borough (2020/21)

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



Source: OHID Child and Maternal Health fingertips profiles Data are missing for Kensington and Chelsea due to small count, and data for City of London were combined with those for Hackney.

Figure 14 shows the nearly two-fold variability in the rate of emergency hospital admissions for asthma across London. Rates above 90 per 100,000 were observed in Newham, Lewisham and Waltham Forest, and below 50 in Wandsworth, and Hammersmith and Fulham. As well as the risk factors for asthma such as levels of environmental pollutants (described in the chapter on The Environment) and aeroallergens, the quality of care and management of the condition are likely to be key determinants of admissions rate.