The State of London

Summary statistics about London's economy and society

June 2022

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Contents

1: INTRODUCTION

Welcome to this first 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 for users to easily navigate using the contents page. 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.

It has been a turbulent two years for the city with COVID-19 having affected almost every aspect of society. The report sheds some light on how London's people, businesses and places have been affected by the pandemic and how the city is recovering. 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.

This is the first report of its kind produced by City Intelligence and it will continue to be developed and improved based on user feedback and as new datasets become available. 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 April-May 2022. A companion State of London Dashboard will be 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 **9.0 million** in mid-2020[1].

- The population of London could reach **10 million by 2038** according to our central trend-based projections[2].

- London has a highly diverse population: **44% of Londoners belong to a Black, Asian, Mixed or Other ethnic group** (13% Black, 21% Asian, 6% Mixed and 4% Other ethnic group)[3].

- 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.[4]

- There are **large health inequalities** across the city. A male born today in Barking & Dagenham will have on average 12 fewer healthy years of life than a male born in Richmond upon Thames[5].

- Around **5 million residents are economically active** (aged 16 and over) in London with 4.8 million in employment[6].

Economy

- London's economy was worth **£468 billion** in 2019 as measured by Gross Value Added, accounting for 24% of UK economic output[7].

- There are around **1 million registered private sector businesses** in London, 18% of the total in the UK[8].

- There are close to **6 million workforce jobs** in the city filled by commuters and London residents[9].

- London's workers are highly productive – **GVA per job is on average £78,000** which is 40% higher than the UK average[10].

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[1] ONS Mid-year population estimates
[2] GLA City Intelligence Unit. 2020-based demographic projections, December 2021
[3] GLA City Intelligence Unit. Ethnic group population projections 2016
[4] ONS Births by mother's country of birth
[5] Office for Health Improvement & Disparities, Fingertips Public Health Data, 2018-20. ONS Health state life expectancy, all ages, UK. March 2022 release. Healthy life expectancy is the average number of years lived in good health.
[6] ONS Labour Force Survey, Jan 2022-Mar 2022 via Nomis.
[7] ONS Regional economic activity by gross domestic product, UK: 1998 to 2019
[8] BEIS Business population estimates for the UK and regions, 2021.
[9] ONS Workforce Jobs, December 2021
[10] GLA Economics calculations using ONS regional GDP and workforce jobs data.

- For all London's prosperity, it has deep-seated inequalities. **Incomes after housing costs at the lowest decile are 30% below the rest of the UK.** In contrast, incomes at the highest decile are 30% higher than the rest of the UK[11].

Place

- London is comprised of **32 borough councils and the City of London**.
- The region covers almost **160,000 hectares** making it the smallest in the UK by land area but with the highest population density (57 people per hectare)[12].
- **Between 48-51% of London's landmass is 'green' or 'blue',** which includes parks, gardens, trees, green spaces, rivers and wetlands[13].
- There are approximately **3.7m residential dwellings** in London, of which 49% are owner occupied, 29% are private rented, and 22% social housing[14].

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[11] DWP Households Below Average Income (HBAI) microdata,
[12] GLA City Intelligence Unit. Land Area and Population Density by Ward and Borough.
[13] GLA City Intelligence Unit analysis of Ordnance Survey and Verisk Analytics GeoInformation Group UKMap data, 2019.
[14] DLUHC Dwelling Stock Estimates in England: 2021

3: DEMOGRAPHY

This chapter provides data on London's demographics including recent trends.

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.

Population change

Figure 1: London population 2001 to 2020

Total population at mid-year (millions)
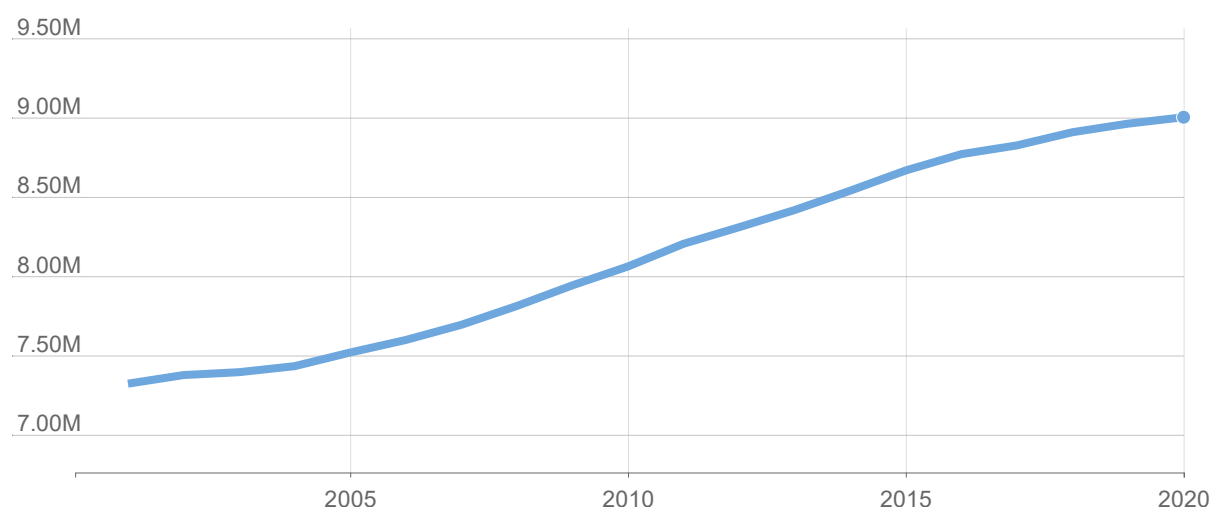
Source: ONS mid-year population estimates

The latest official estimates gave the population of London as 9.0 million at mid-2020, an increase of close to one million from a decade earlier.

Figure 2: Annual population change
Change from previous mid-year (%)

Source: ONS mid-year population estimates

London's population grew at a much faster rate than that of the rest of the UK from the mid-2000s to the mid-2010s. The subsequent fall in the growth rate is in part due to the fall in EU migration tha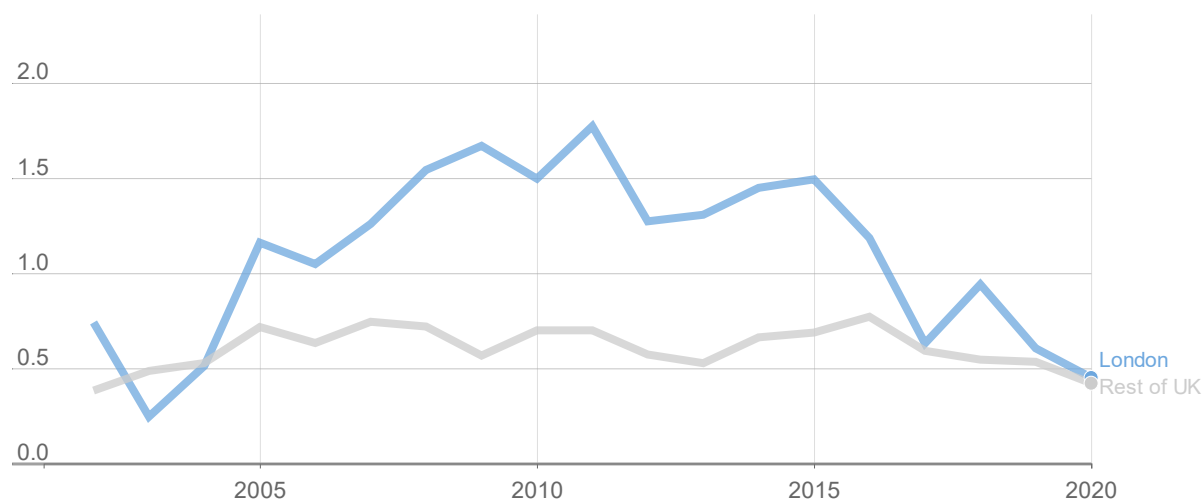t coincided with the 2016 referendum, but also reflects higher levels of outflows from London to the rest of the UK as well as falling numbers of births.

The most recent official data covers the period up to mid-2020 and so only captures the first few months of the pandemic. The subsequent impacts of the pandemic on international migration and departure of the UK from the European Union will have had a disproportionately large impact on London, where net international migration has averaged over 90 thousand per year since mid-2001.

The GLA's most recent demographic projections anticipated a decrease in London's population of more than 100 thousand (1.2%) over the year to mid-2021. However, subsequent analysis has indicated that a significant proportion of losses over this period were likely temporary, and that large numbers of young adults have returned to the city since spring 2021.

Figure 3: Annual change in patient register: young adults (age 18 to 29)

Change in count from year before, London
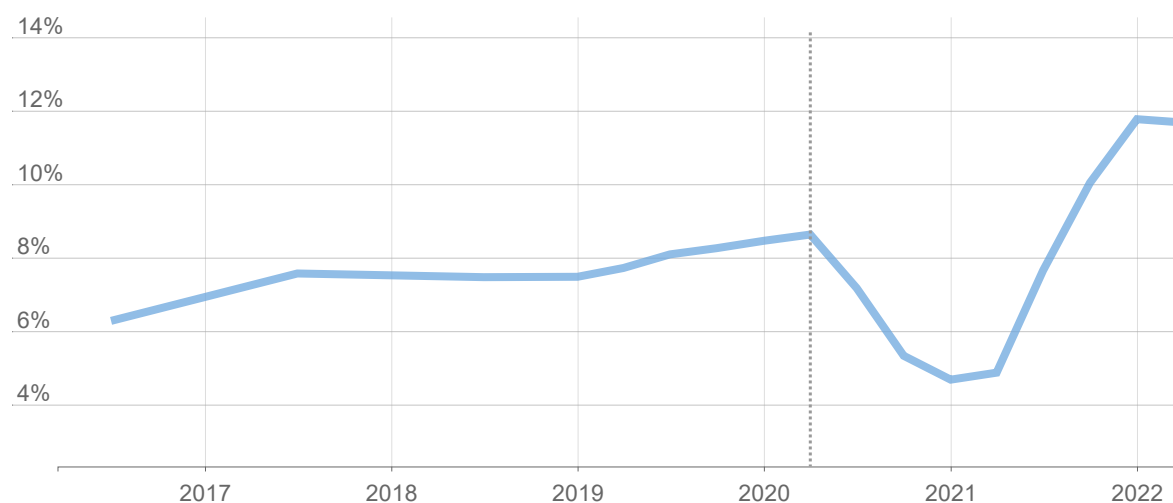
Source: NHS Digital - Patients Registered at a GP Practice. GLA calculations.
Note: Dotted line at 1 April 2020. Change relative to previous counts of persons one year younger.

Figure 4: Annual change in patient register: family ages

Change in count from year before, London
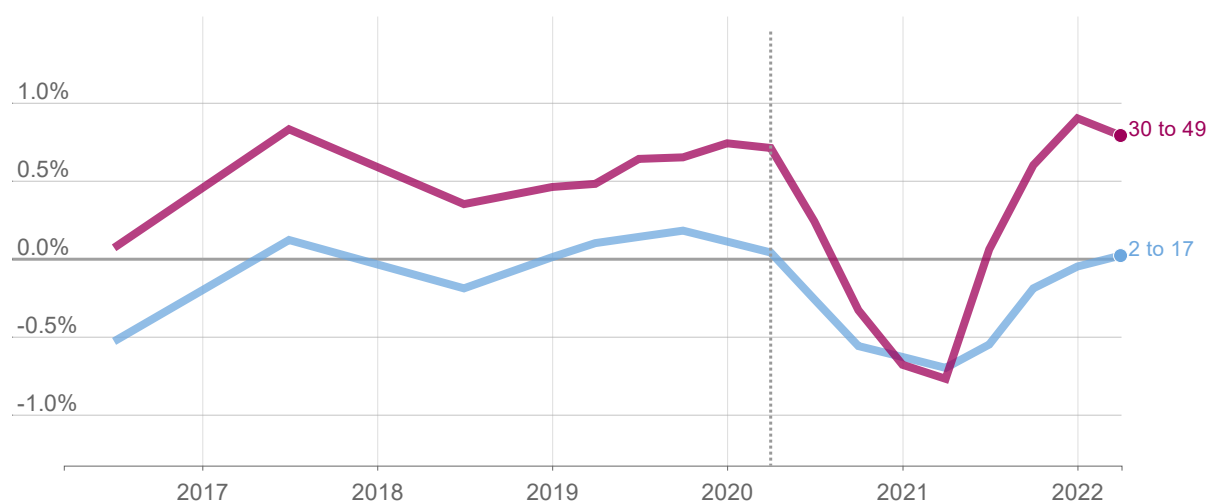
Source: NHS Digital - Patients Registered at a GP Practice. GLA calculations.
Note: Dotted line at 1 April 2020. Change relative to previous counts of persons one year younger

Comparing changes in patient register counts over time can provide a timely indication of trends for different population groups[15]. Combined with other sources of evidence (see Population change in London during the pandemic) this data is consistent with:

- Many young adults leaving or deferring moves to London after the first lockdown, before a strong recovery of net inflows to London from spring 2021 onwards.

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[15] Note that underlying issues with patient register data, particularly growing levels of 'list inflation', mean that changes in counts cannot be directly interpreted as changes in population

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- Increased net outflows of families from London following the first lockdown. While trends in patient register counts for school age children have returned to pre-pandemic levels, those that imply an elevated outflow of younger children have been more persistent.

International migration

Figure 5: UK international migration
Annual flow for year ending (thousands)
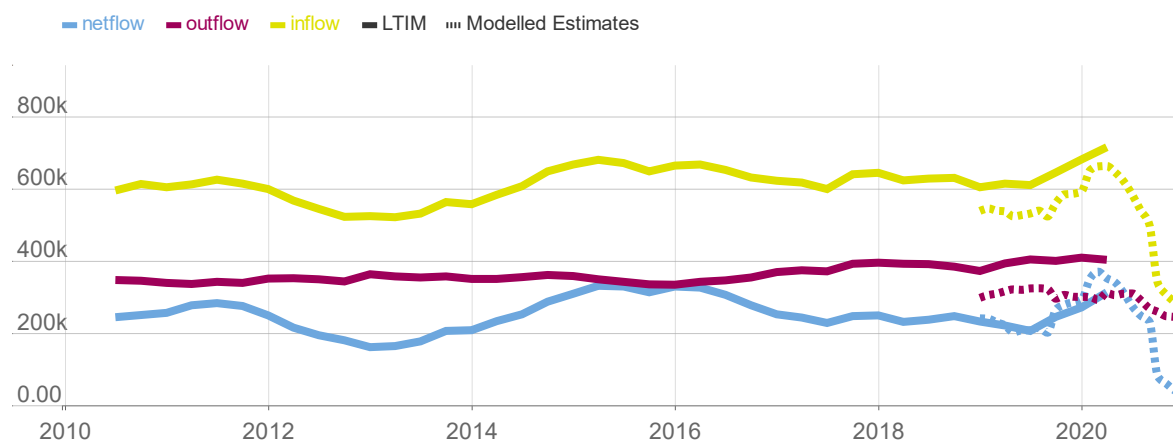
Source: ONS Long-term International Migration (LTIM) estimates. ONS provisional modelled estimates.

The suspension of the International Passenger Survey (IPS) at the start of the pandemic caused disruption to the production of Long-term International Migration (LTIM) statistics. ONS has since published provisional estimates, modelled from a range of alternative sources of data.

These provisional estimates, covering up to the end of December 2020, show a sharp drop in inflows to the UK following the start of the pandemic, but a much smaller effect on outflows. This brought estimated net migration to the UK close to zero for the year, down from over 300 thousand in the year preceding the first lockdown.

Figure 6: UK international migration: European Union

Annual flow for year ending (thousands)
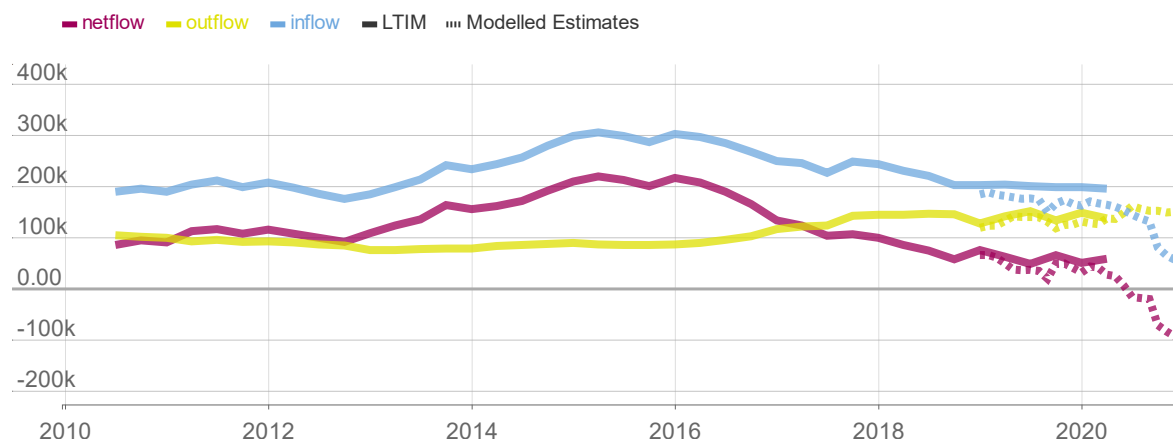
Source: ONS Long-term International Migration (LTIM) estimates. ONS provisional modelled estimates.

Following the referendum vote in 2016, inflows from the European Union decreased while outflows increased. The net balance of EU migration remained positive until the start of the pandemic. For calendar year 2020, there was an estimated net outflow of 100 thousand people to the EU, likely to be the result both of workers returning due to loss of work in the hospitality and tourism sectors, and the UK's exit from the EU at the end of 2020.

Annual births

Figure 7: Annual births and children aged 0 on the patient register

London (thousands)
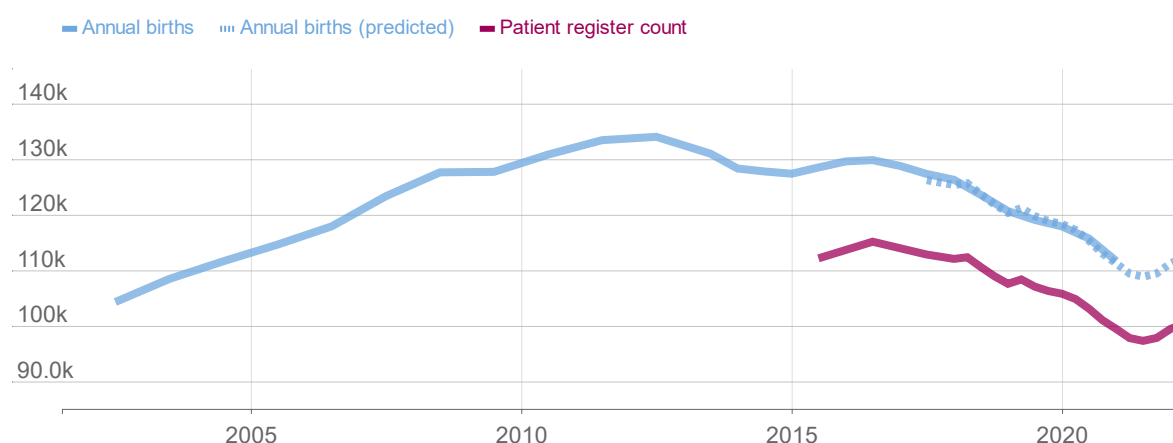
Source: NHS Digital - Patients Registered at a GP Practice, ONS birth estimates, GLA calculations
Note: Births plotted by date of year ending, persons aged 0 by extract date

Annual births in London rose throughout the 2000s, peaking at 134 thousand in calendar year 2012. The latest official estimates for 2020 show 112 thousand births, 17% below the 2012 peak.

More recent trends can be predicted based on the relationship between annual births and the number of persons present on patient registers who have yet to reach their first birthday. Such predictions suggest that annual births may subsequently have fallen at an increased rate until mid-2021, reaching a low of approximately 108 thousand, before recovering back to 112 thousand in the year to April 2022.

Figure 8: Changes in annual births over time
London and Rest of England, annualised rate of change
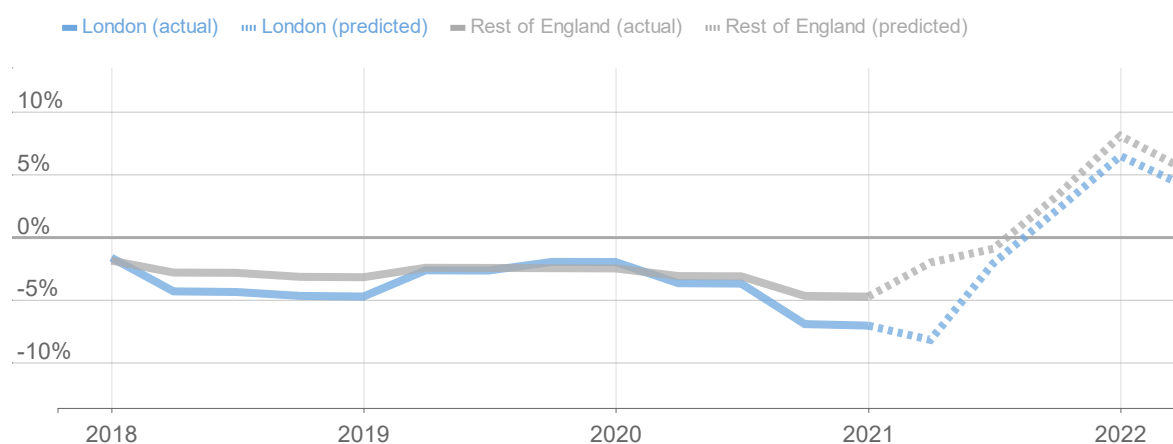
Source: [NHS Digital - Patients Registered at a GP Practice](#), [ONS birth estimates](#), GLA calculations

The data suggests that there may have been a modest negative impact on conceptions in the initial six months of the pandemic. However, the rapid rate at which births subsequently recovered, in both London and the rest of England, points towards this being a result of decisions to temporarily postpone, rather than cancel, plans to have children.

4: 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 the end of 2021 or start of 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
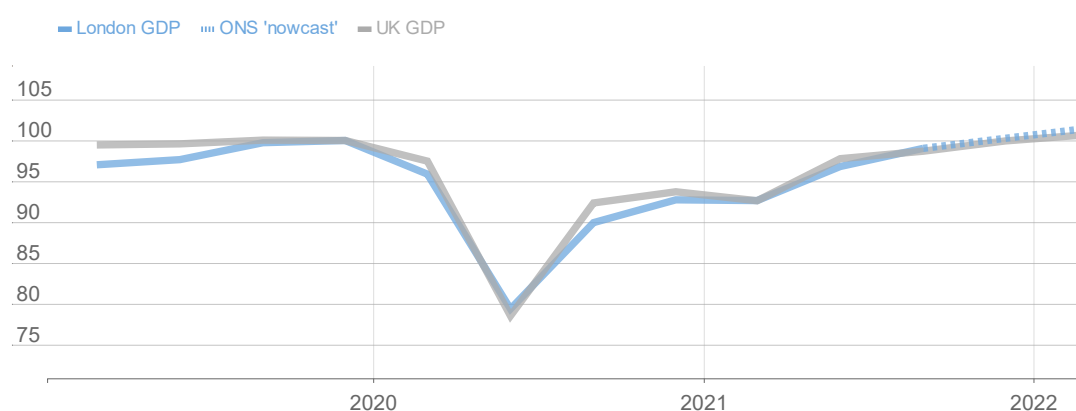
Source: GLA calculations, Office for National Statistics; Note: 'Nowcast' refers to the ONS' Model-based early estimates of regional gross value added, which are experimental estimates of output growth produced using an econometric model. More information is available in the latest release.

London's economy has recovered broadly in line with the wider UK, with output likely reaching pre-pandemic levels by the end of 2021. The ONS estimates that London's output grew firmly after the end of the third lockdown and their nowcast of Gross Value Added shows the capital's economy growing 9.5% year-on-year in Q1 2022. This compares to long-run average growth of plus 3%. GLA Economics forecasts output growth in London of 7.8% across 2021 and 4.1% in 2022 alongside jobs growth of 0.4% in 2021 and 2.2% in 2022.

Figure 2: Monthly spend across London on weekdays

% of the corresponding 2019 monthly values
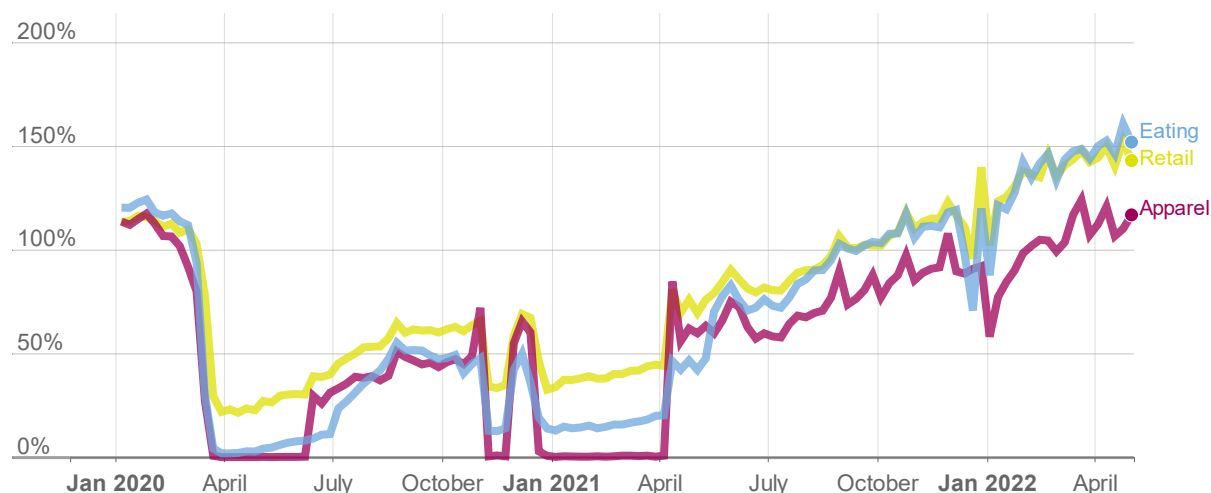
Source: GLA City Intelligence, Mastercard's Retail Location Index.

Consumer expenditure has continued to recover following the decline seen during the pandemic, despite a difficult Christmas 2021 period for retailers. Both retail and eating spending surpassed 2019 levels (in nominal terms) in August 2021, while spending on apparel was slower to catch up, surpassing 2019 levels in February 2022. Weekend spending data (not shown) suggests similar trends.

Figure 3: Consumer confidence in London

Confidence index, 0 = neutral
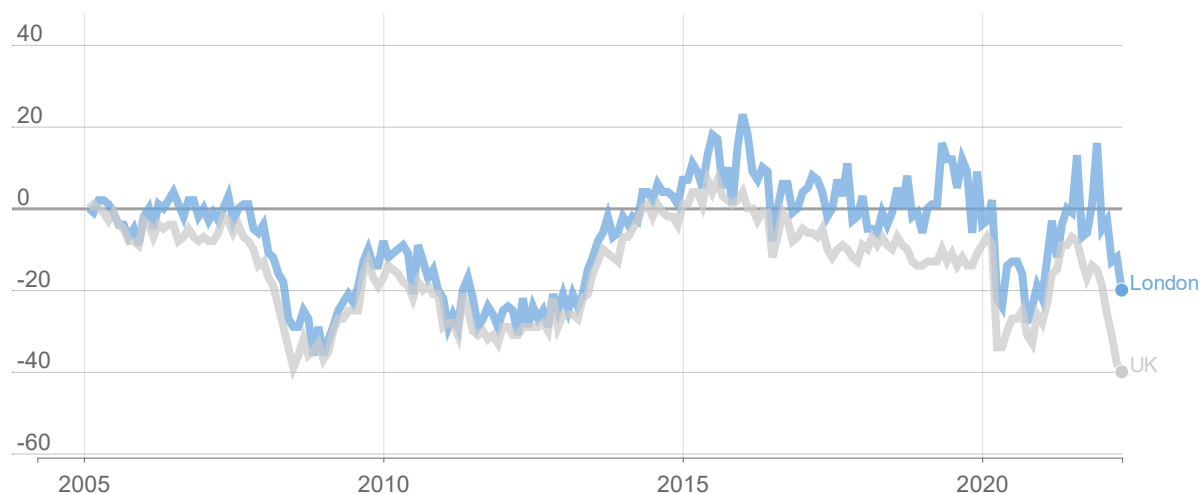
Source: GfK NOP

Consumer confidence in London fell sharply in May 2022 to -20, from -12 in April. Below the neutral mark of zero, the May reading is in line with figures seen in early 2021 as rising inflation drags on household sentiment.

The national figure for consumer confidence presented an even worse picture, with the UK index at -40, down two points from April's figure. This drop takes UK consumer confidence to its lowest ever level since records began in 1974. This means that while London's consumers are not confident, they are currently much less pessimistic than the average UK household.

Figure 4: Foreign Direct Investment (FDI) into London

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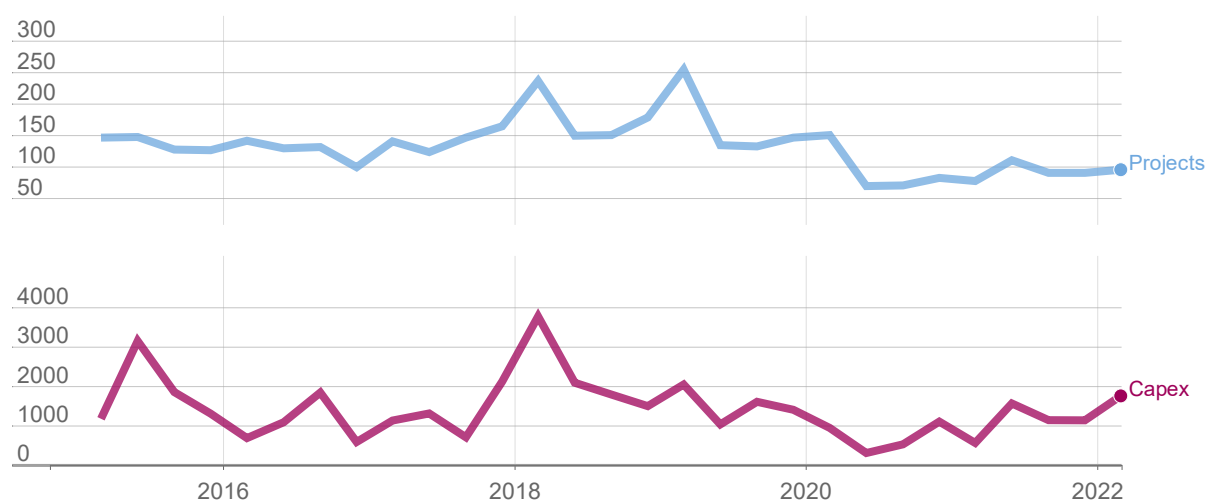
Source: fDi Markets, from the Financial Times Ltd 2021

In January to March 2022 there were 95 FDI[16] projects into London, worth £1.75bn in capital expenditure according to estimates by fDi Markets. In the five years before the pandemic the average was around 150 FDI projects worth £1.57bn per quarter.

The latest quarterly figures represent a continuation of the recent mini revival in FDI. Capital expenditure has recovered to pre-pandemic levels and the volume of projects appears to be slowly improving.

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[16] 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)
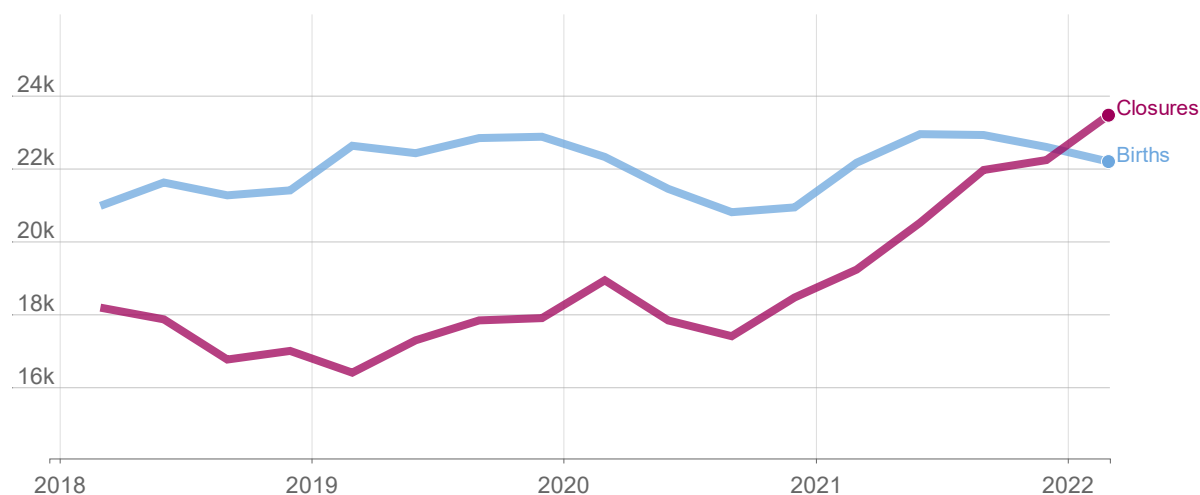
Source: ONS Business Demography. Note: experimental data.

In London's vibrant business sector, business births have in recent years always exceeded business closures[17]. 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.

Of concern is that while the business birth rate appears to have plateaued in recent quarters, business closures continued to rise. This has caused the net growth in business numbers normally seen in London to diminish. Indeed, taking the average of the last four quarters, business closures (23,500 per quarter) were higher than births (22,200 per quarter) for the first time in this series.

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[17] 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 period December 2021
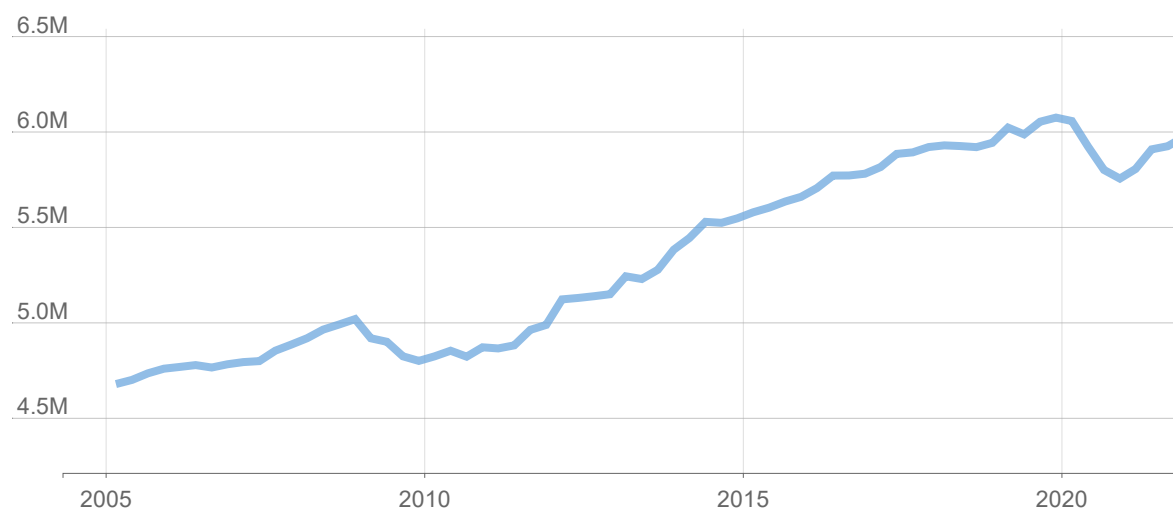
Source: ONS Workforce Jobs. Note: The margin of error for all jobs is +/- 0.9% for London and +/- 0.3% for the UK. This is a workplace-based measure.

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 5.97 million in December 2021.This latest estimate represents a decrease of approximately 103,000 or 1.7% from December 2019 levels (the pre-pandemic peak in London) compared with a decrease of 1.1% across the UK on average.

The recovery in workforce jobs in London varies considerably across its two major components. The number of employee jobs increased by 24,400 (0.5%) between December 2019 and December 2021, while the number of self-employment jobs decreased by 128,000 (15.5%).

Figure 7: Workforce Jobs profile by broad sector

Number of jobs in sections A-S (millions), latest data for period December 2021
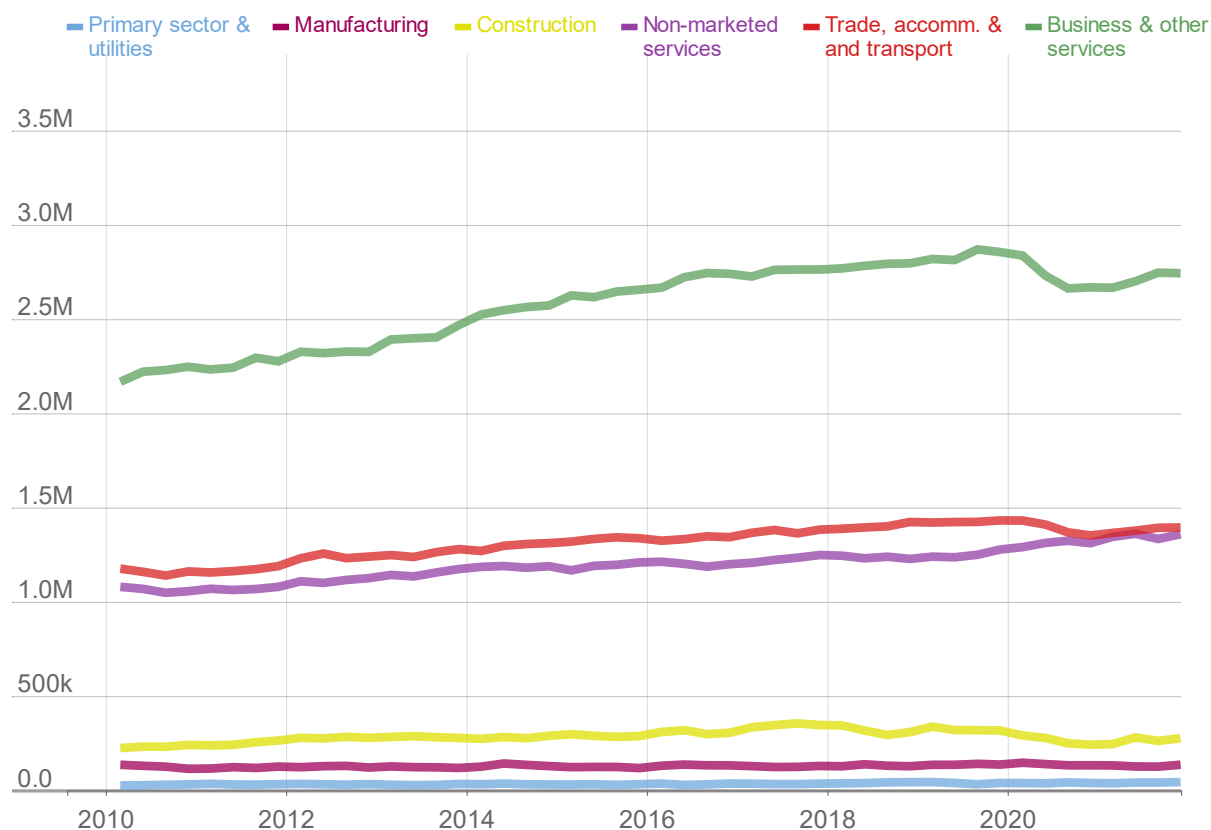
Source: GLA Economics analysis of ONS Workforce Jobs (via Nomis)

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 December 2021, there were 2.74 million jobs in business and other services, including professional and IT services, up from 2.25 million for the same period in 2010 (a 22% increase). The number of jobs in non-marketed services, such as health and education, increased from 1.06 million to 1.36 million over the same period (an increase of 28%).

Over time, the London economy has also become relatively less involved in primary and production-based activities. For example, manufacturing directly accounted for only 2% of workforce jobs in December 2021 compared to 7% for the UK overall.

Figure 8: Employment rate

% aged 16-64, latest data for period Jan 2022-Mar 2022
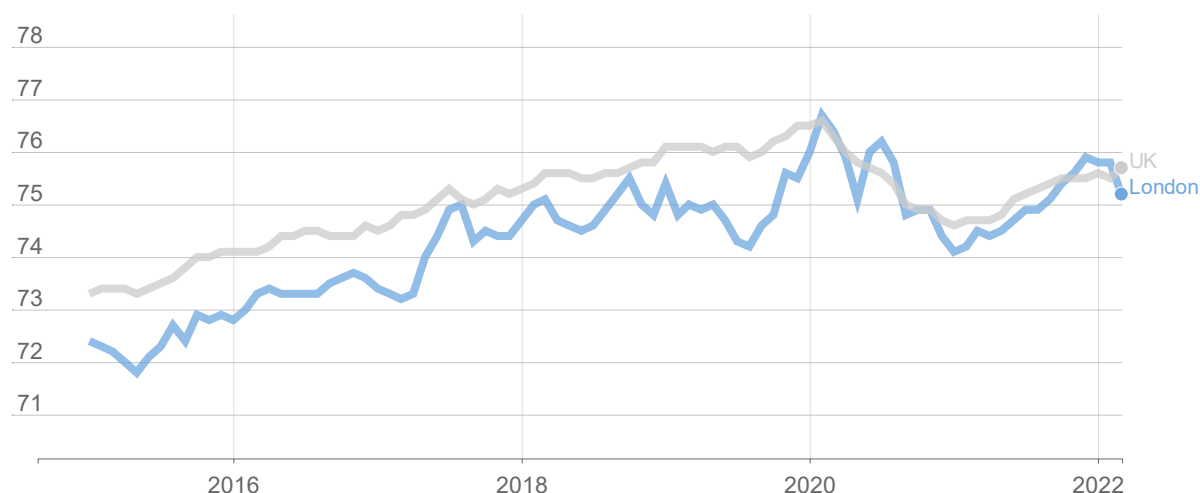
Source: ONS Labour Force Survey. Note: the margin of error for employment rate estimates is +/- 1.5% for London and +/- 0.1% for the UK.

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 January to March 2022, the employment rate in London was estimated at 75.2%. This was down 0.7 percentage points (pp) on the previous quarter and up 0.7pp from a year earlier.

The overall UK employment rate was estimated at 75.7% – up 0.1pp on the quarter and 0.9pp on the year.

Figure 9: Unemployment rate

% economically active population, latest data for period Jan 2022-Mar 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.
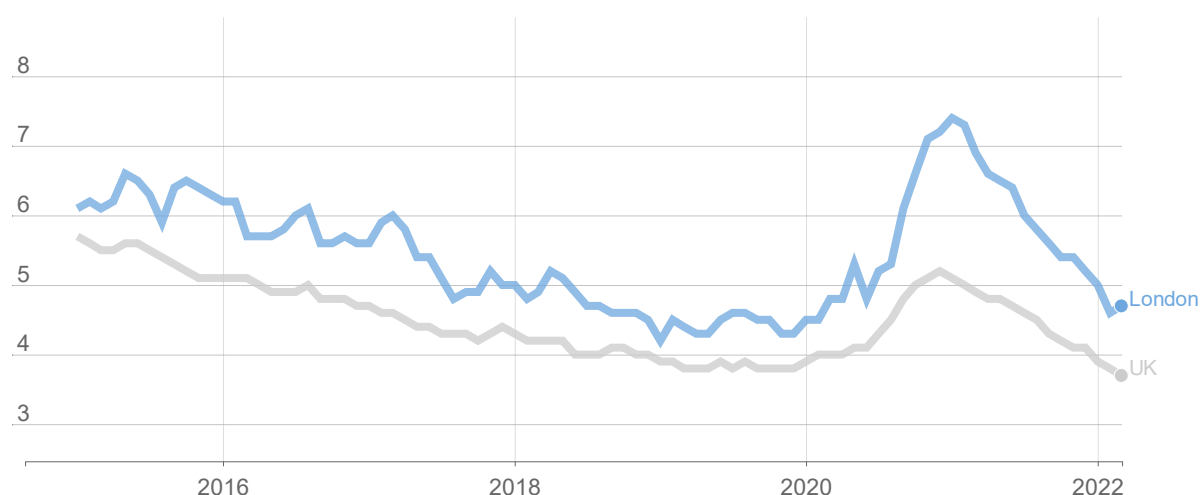
Unemployment measures people without a job who have been actively seeking work within the last four weeks and are available to start work within the next two weeks.

For January to March 2022, the unemployment rate for London was estimated at 4.7% - down 0.4pp on the quarter and down 2.2pp from a year earlier.

The UK unemployment rate was lower at 3.7% - down 0.3pp from the previous quarter and 1.2pp on the year.

Figure 10: Economic inactivity
% aged 16-64, latest data for period Jan-2022-Mar 2022
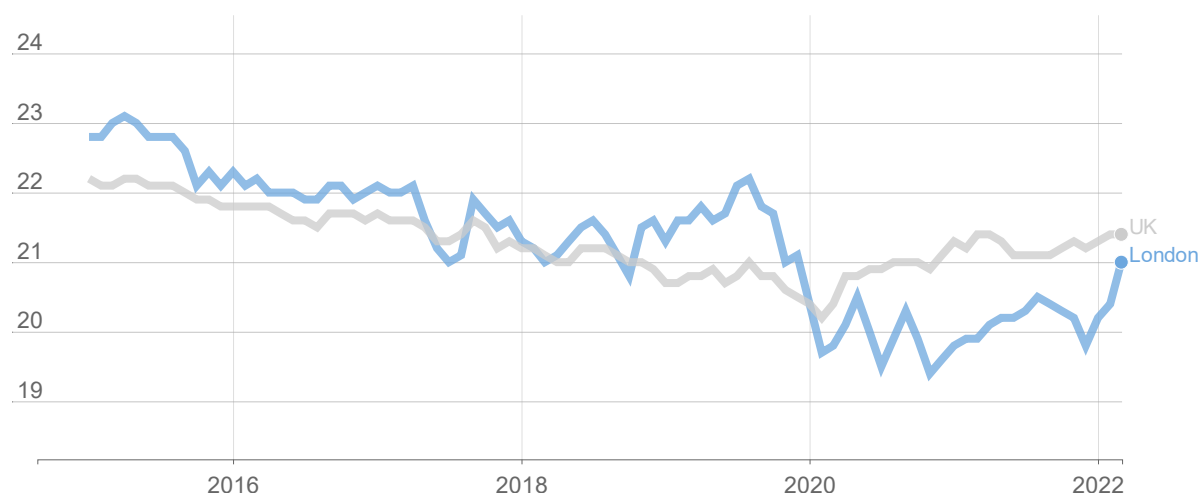
Source: ONS Labour Force Survey. Note: the London margin of error is not published for economic inactivity rates, the UK margin is +/- 0.4%.

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 (most of whom are long-term sick).

For January to March 2022, the rate of economic inactivity in London was estimated at 21.0%. This was up 1.2pp on the previous quarter and up 1.1pp on the year.

The UK rate of economic inactivity was 21.4%. This was up 0.1pp on the previous quarter and unchanged on the year.

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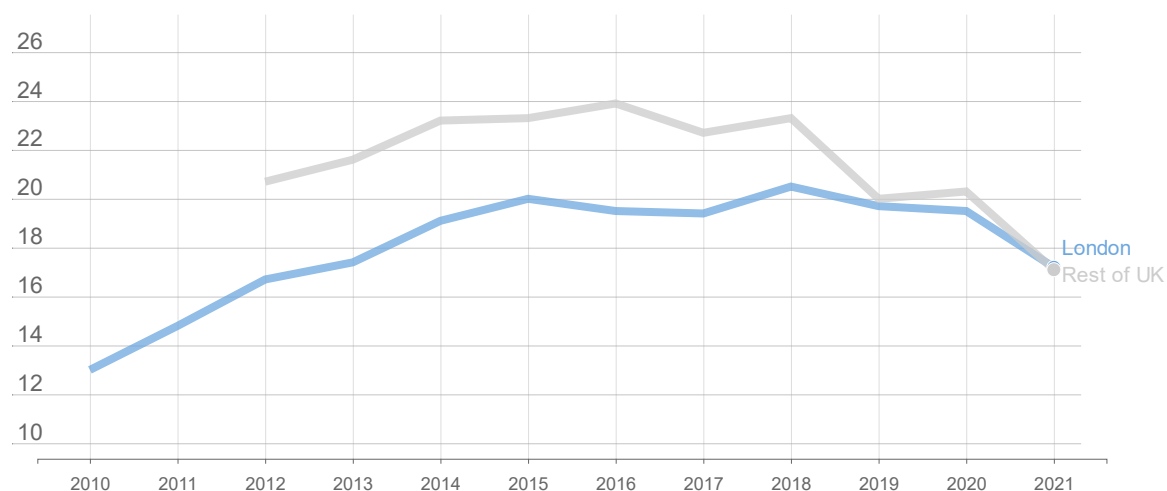
Source: Annual Survey of Hours and Earning, Note: 2021 data provisional.
Chart: GLA Intelligence – see London Datastore.

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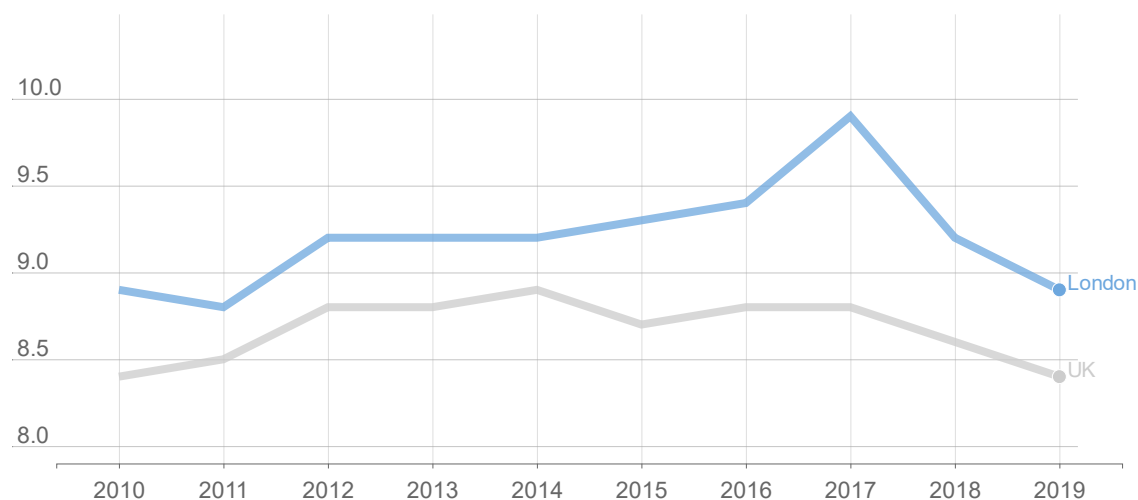
Source: ONS Annual Population Survey.
Chart: GLA Intelligence, see London Datastore.

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 percentage of workers in insecure employment in London increased from 8.9% in 2010 to a peak of 9.9% in 2017. This percentage has since fallen to around one in eleven (8.9%) in 2019 but remains above the UK figure of 8.4%

Figure 13: Employment rate gaps
Percentage points difference, latest data for period Jan 2021-Dec 2021
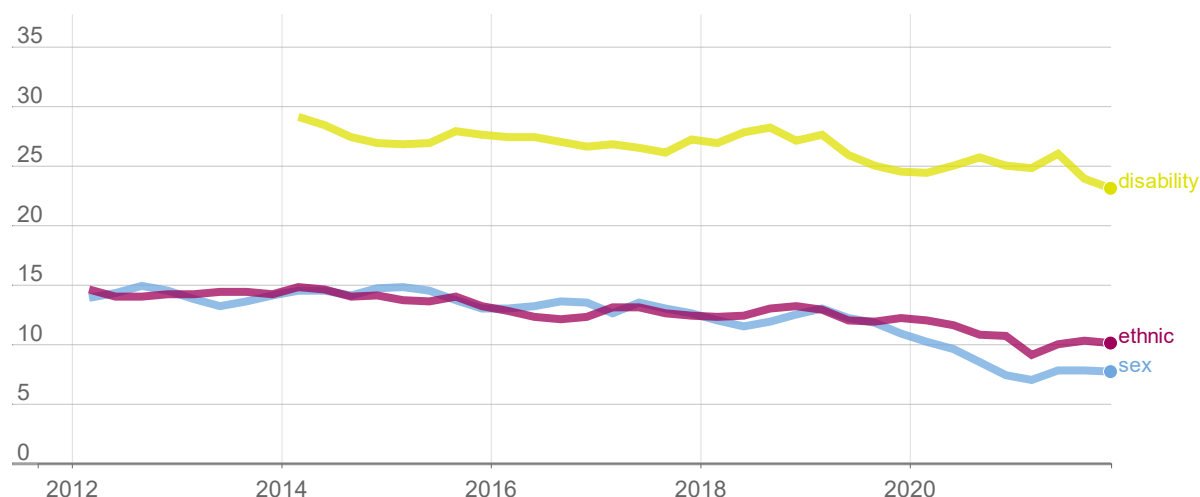
Source: ONS Annual Population Survey.

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.

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The latest gap between male and female Londoners is 7.7 percentage points (pp). This is slightly above the national average (6.5pp) but has been falling in recent years.

The latest gap between all White Londoners and Londoners from all other ethnic backgrounds combined is 10.1pp. This is 1.5pp higher than the national average.

The latest gap between Londoners with disabilities and Londoners without disabilities is 23.1pp. This is below the national average (26.2pp) 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
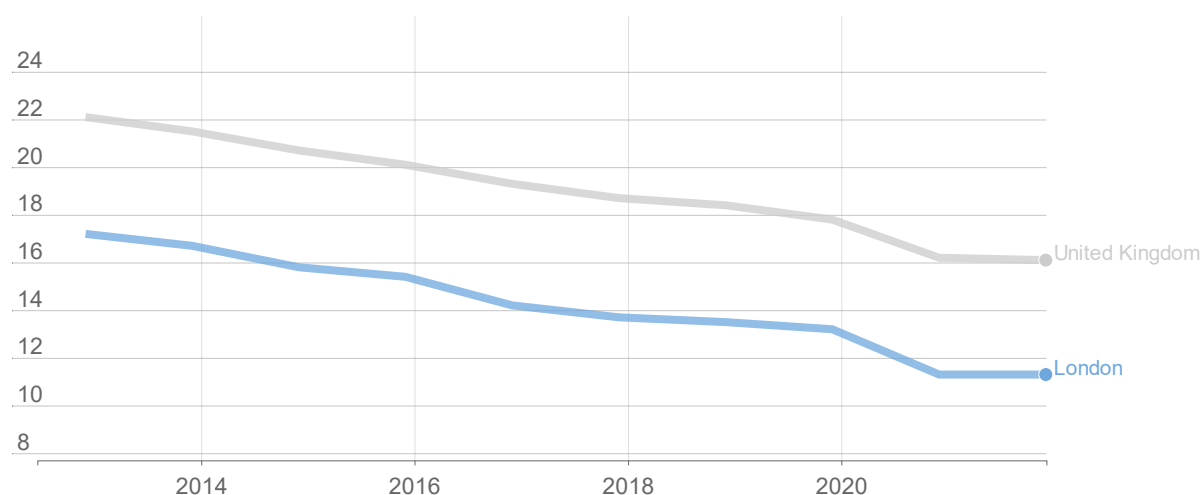
Source: ONS Annual Population Survey.
Chart: GLA Intelligence – see [London Datastore](.).

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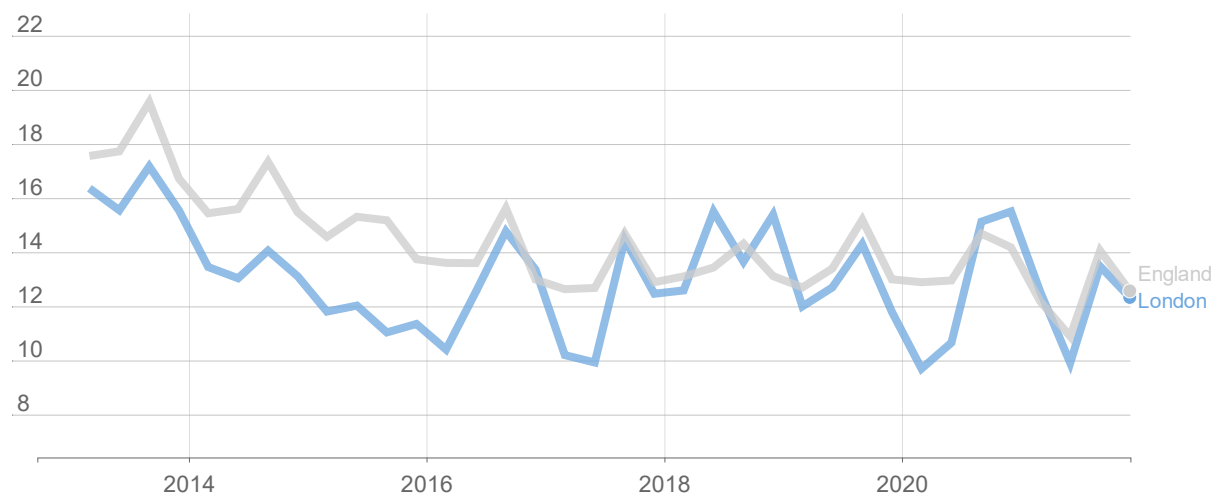
Source: ONS Labour Force Survey.
Chart: GLA Intelligence – see London Datastore.

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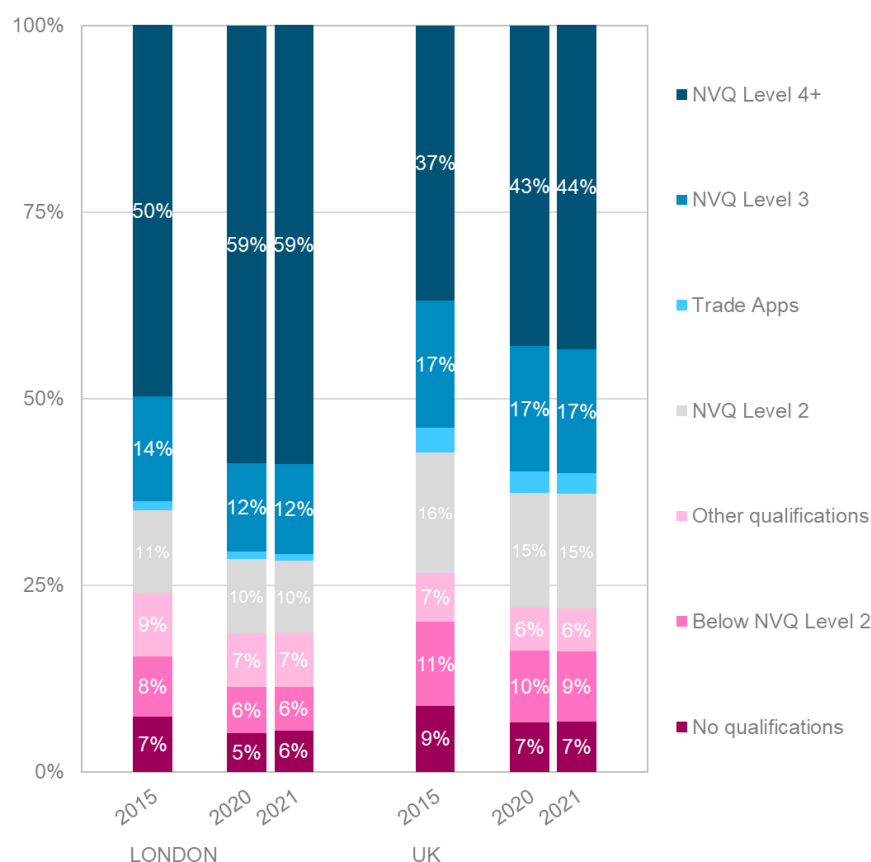
Source: ONS Annual Population Survey. Note: Level 4 qualifications include a certificate of higher education, higher apprenticeship, level 4 diploma, etc. For more information see list of qualifications by level.

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.

5: COMMUNITIES

This chapter sets out trends in a range of measures related to strong communities in London. These measures have been chosen with active participation in mind, as well as the state of 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.

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.

A useful resource for readers is the Civic Strength Index, which was first published by The Young Foundation in 2021 and funded by the GLA.

Civic participation

Figure 1: Formal volunteering

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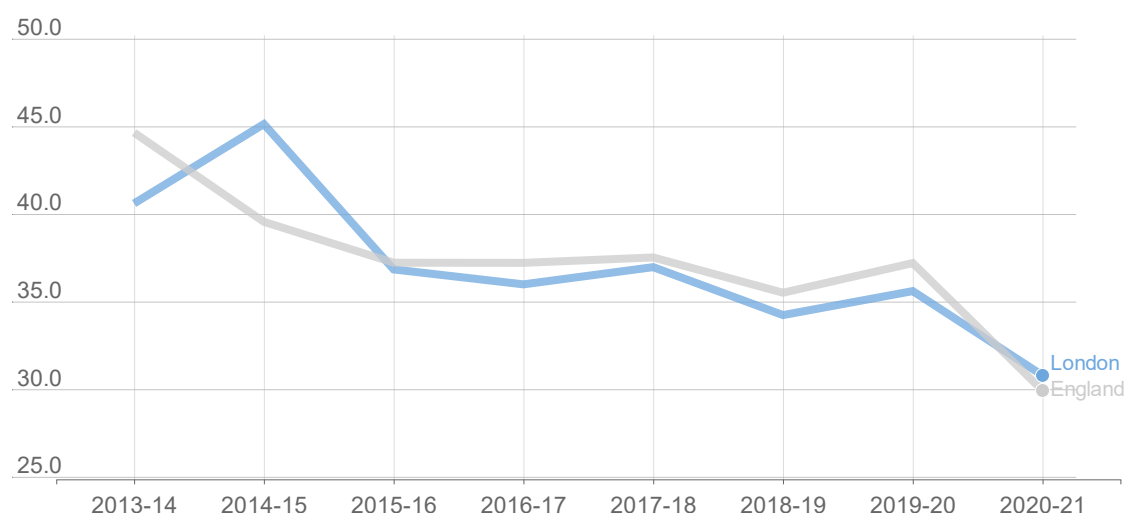
Source: DCMS, Community Life Survey

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 (%)
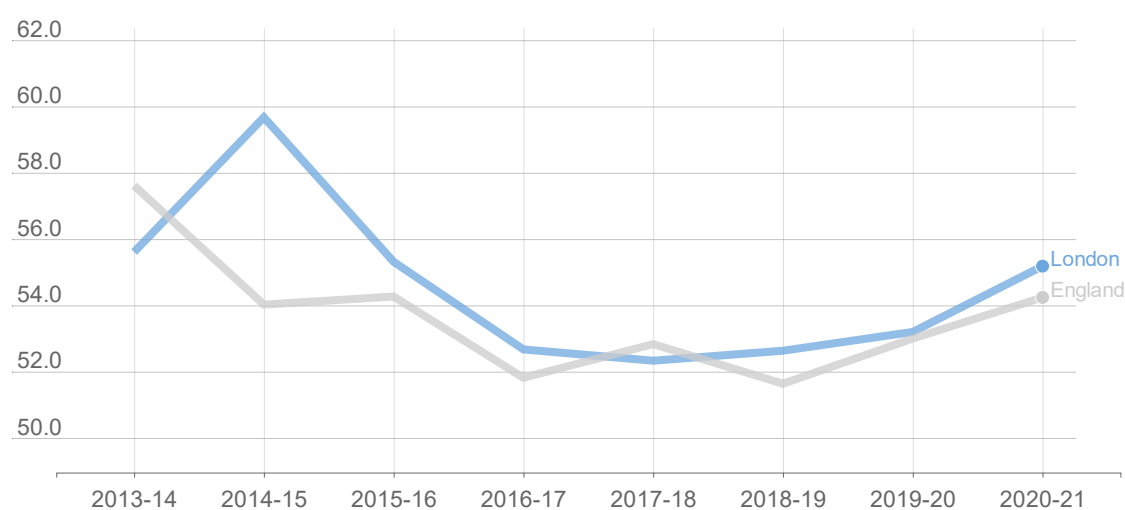
Source: DCMS, Community Life Survey

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 (%)
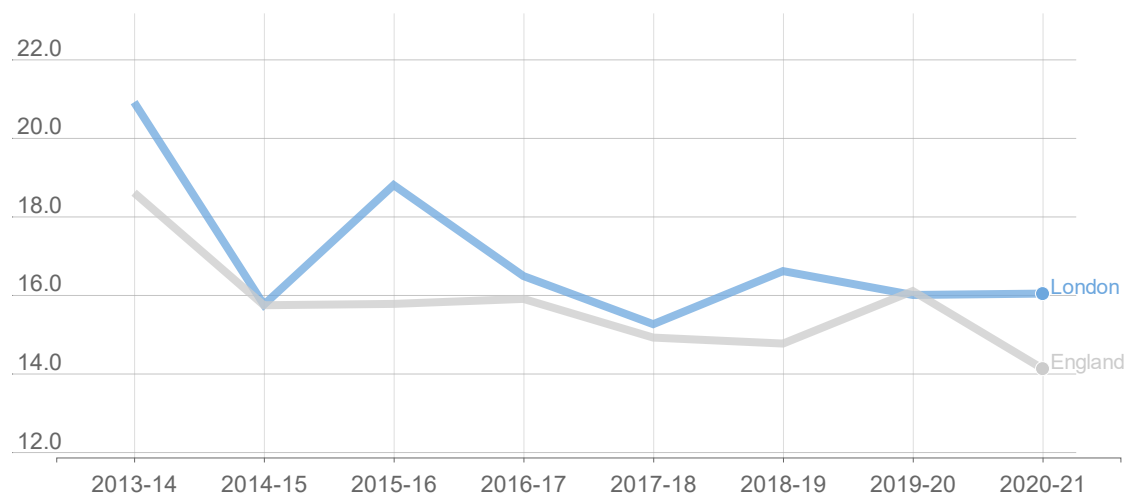
Source: DCMS, Community Life Survey

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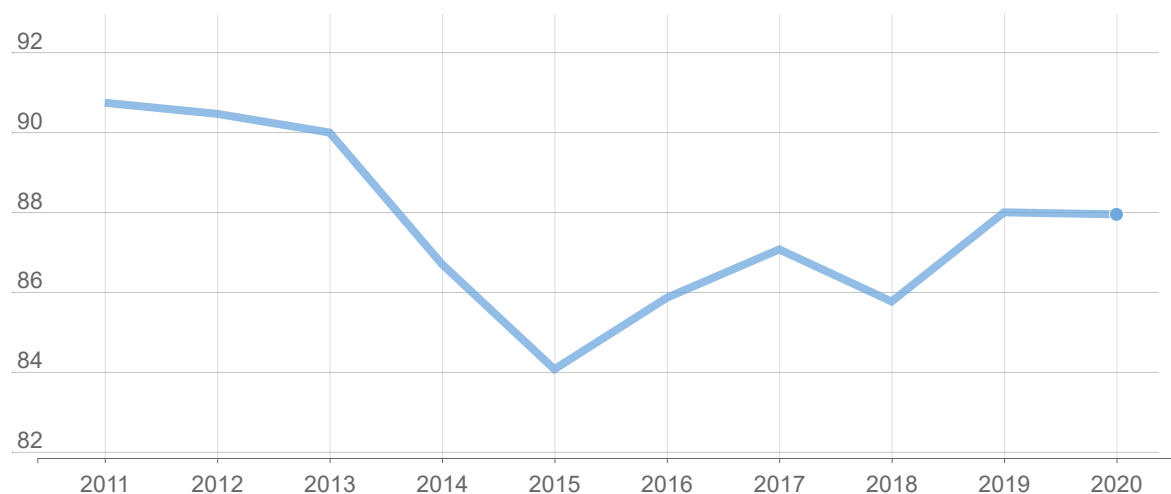
Source: Electoral Statistics for UK; Mid-Year Population Estimates

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 increased difficulties 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. By 2020, this was 88%. In other words, around one in eight Londoners (12%) were not registered to vote in 2020.

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 (%)
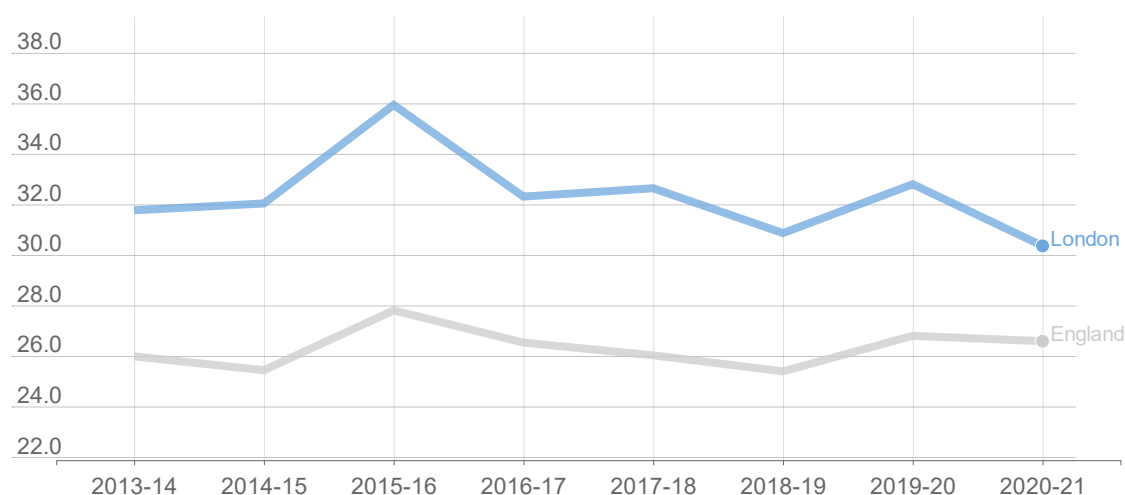
Source: DCMS, Community Life Survey

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 (%)
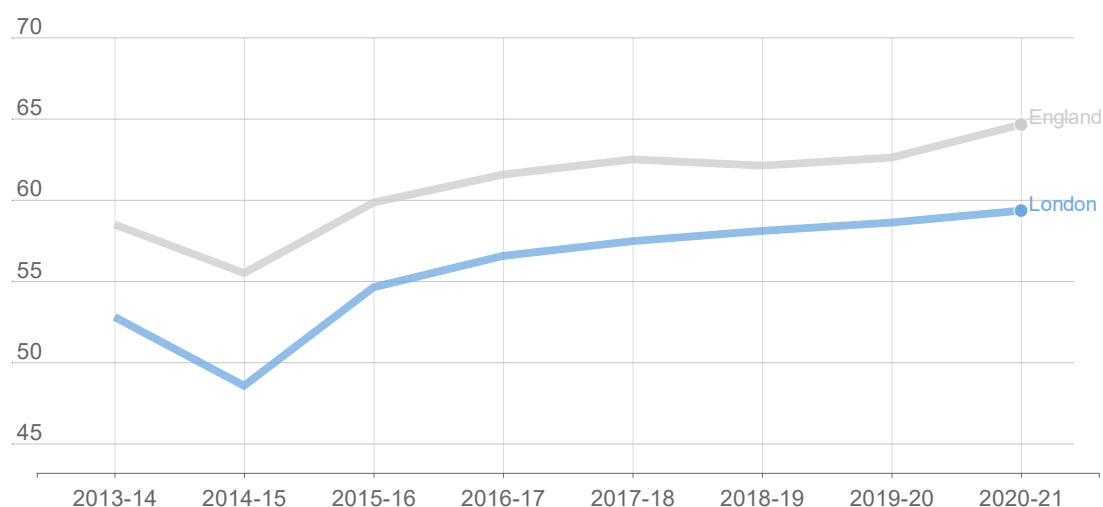
Source: DCMS, Community Life Survey

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 2018-19 Survey of Londoners 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 (%)
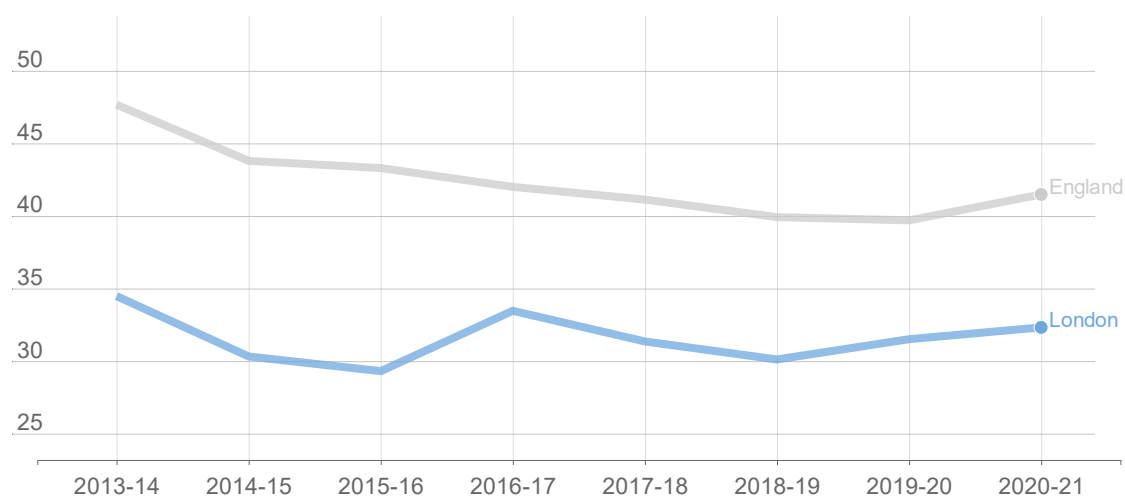
Source: DCMS, Community Life Survey

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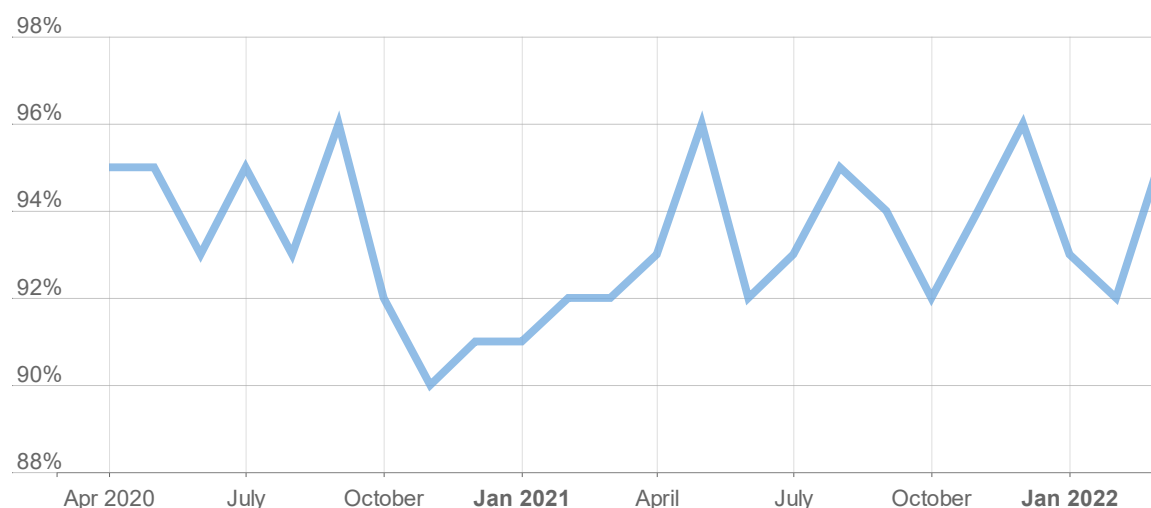
Source: MOPAC, Public Attitude Survey (PAS)

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 March 2022, 95% of Londoners agreed with the statement.

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

Figure 9: Recorded hate crime

Number of hate crime offences in London as recorded by the MPS
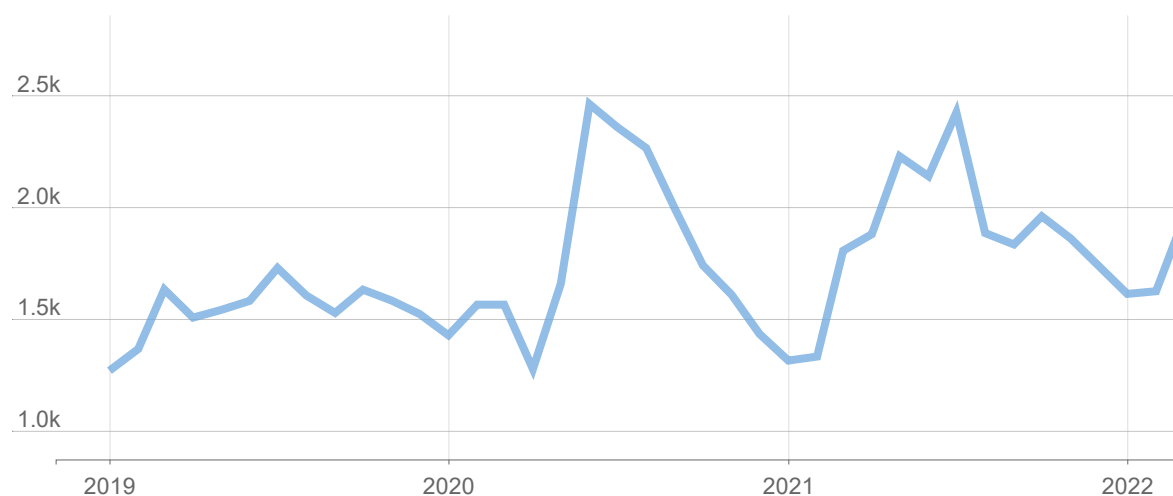
Source: Met Police, Hate Crime Dashboard

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

Though there was an immediate drop in offences after the first lockdown (1,300 offences in April 2020), recorded hate crime offences reached a peak of 2,500 offences in June 2020. The number each month then decreased to reach pre-pandemic levels by December 2020 (1,400). The number of hate crime offences rose steadily each month over the first half of 2021 peaking at 2,400 offences in July 2021. The number of monthly offences decreased over the second half of 2021, falling to 1,600 by January 2022, but had increased to 1,900 in March 2022.

Figure 10: Perception of hate crime

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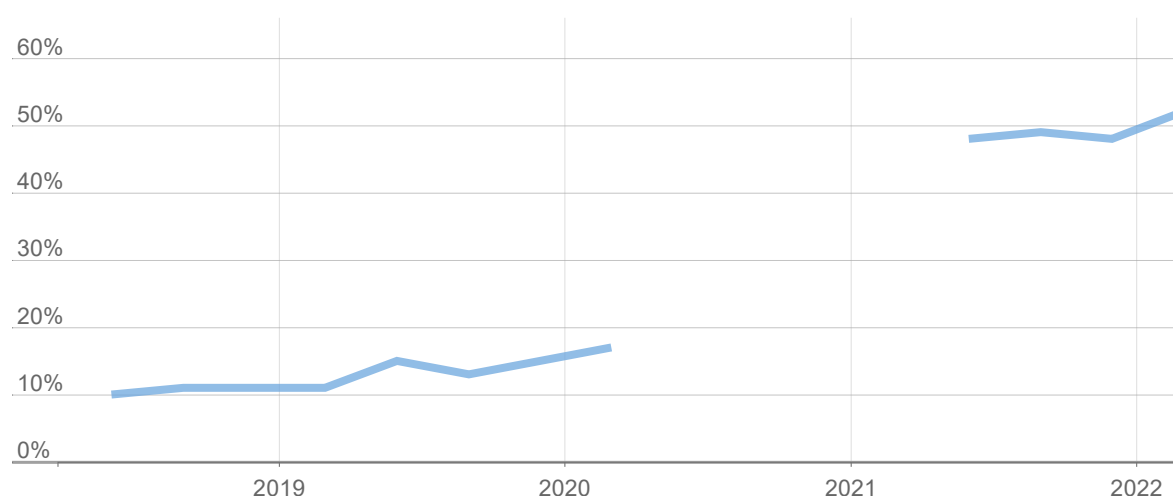
Source: MOPAC, Public Attitude Survey (PAS)

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).

Relationships

Figure 11: Talking to neighbours

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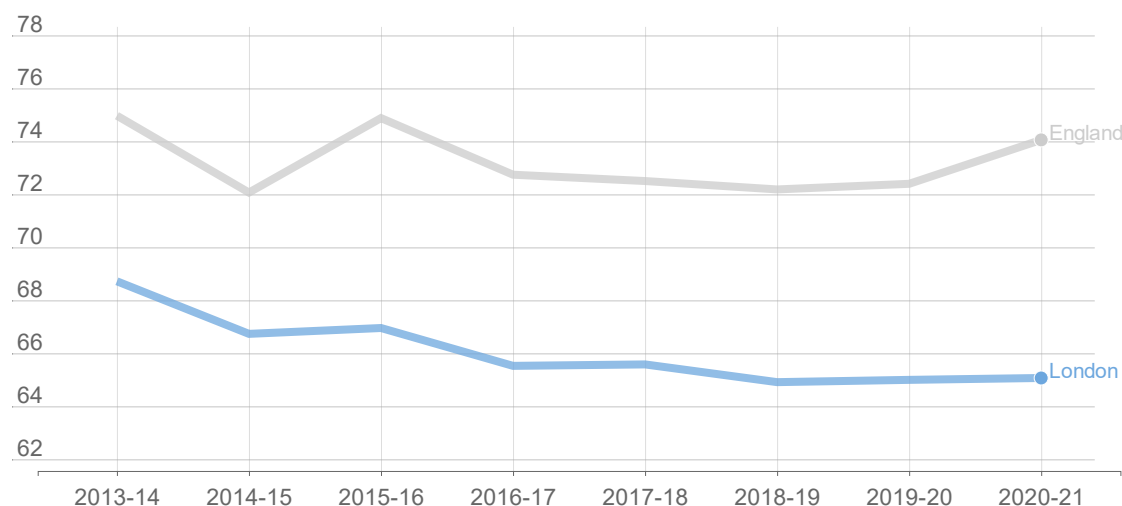
Source: DCMS, Community Life Survey

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 (%)
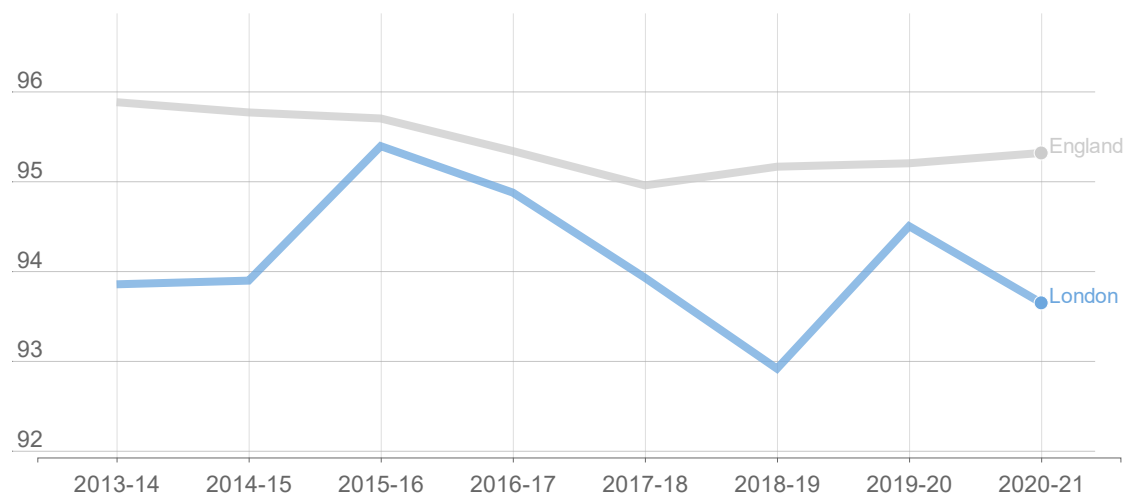
Source: DCMS, Community Life Survey

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

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

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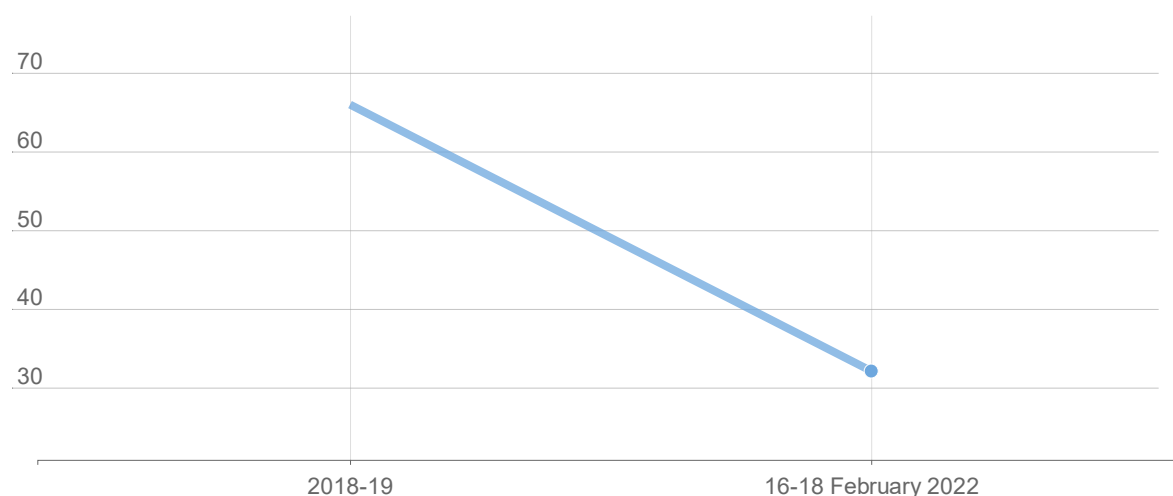
The Culture Strategy for London outlines the GLA's aims in providing Londoners with access to culture on their doorsteps. In the Survey of Londoners 2018-19 formal culture and events was defined as going to the cinema, visiting museums/galleries, going to the theatre/music concerts or attending local community festivals and events.

In that survey in 2018-19, around two thirds of Londoners aged 16+ (66%) had participated in formal culture and events in the last month. When polled in February 2022, 32% of Londoners had engaged in formal culture and events in the last month.

Figure 14: Participation in sport

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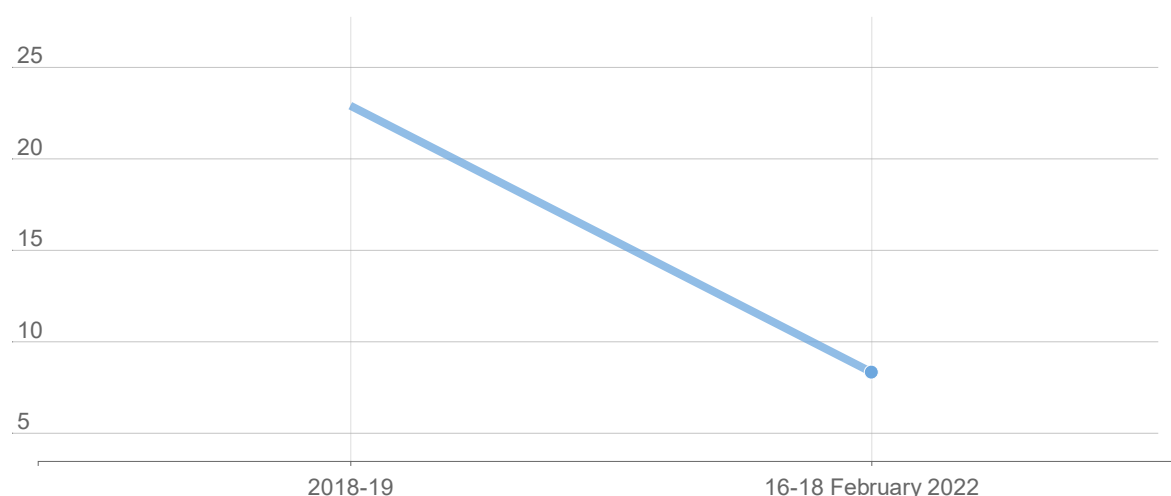
Source: Survey of Londoners 2018-19 and GLA/YouGov

The Survey of Londoners 2018-19 also captured participation in sport. In 2018-19, around a quarter of Londoners aged 16+ (23%) had played sport in the previous month. When polled in February 2022, 8% of Londoners had played sport in the last month.

This large decrease in culture and sports participation may be partly attributable to the Omicron variant, which led to precautionary measures in December 2021 and January 2022, thus coinciding with the reference period for the polling. There may also be 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 who trust various services, using a five-point scale (%)

● 1 & 2 - trustworthy   ● 3   ● 4 & 5 - untrustworthy
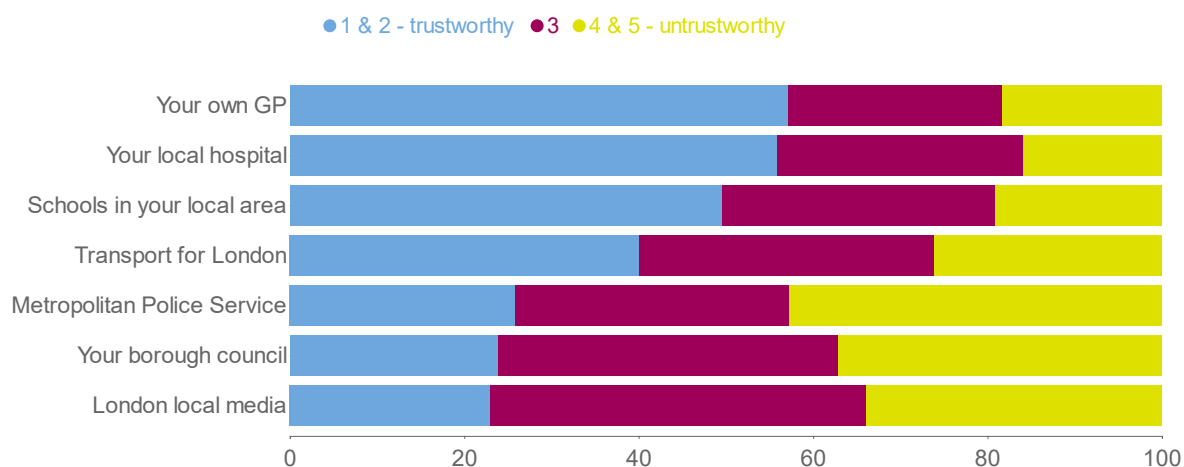
Source: GLA/YouGov

When 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 (57%) and their local hospital (56%) were most likely to be scored as trustworthy.

Trust was lowest for London media (23%), borough councils (24%) and the Metropolitan Police Service (26%).

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; concluding with a very noticeable drop between Q3 2021/22 and Q4, where the proportion of respondents agreeing that the MPS is an organisation that they can trust fell from 75% to 66%. 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 (%)
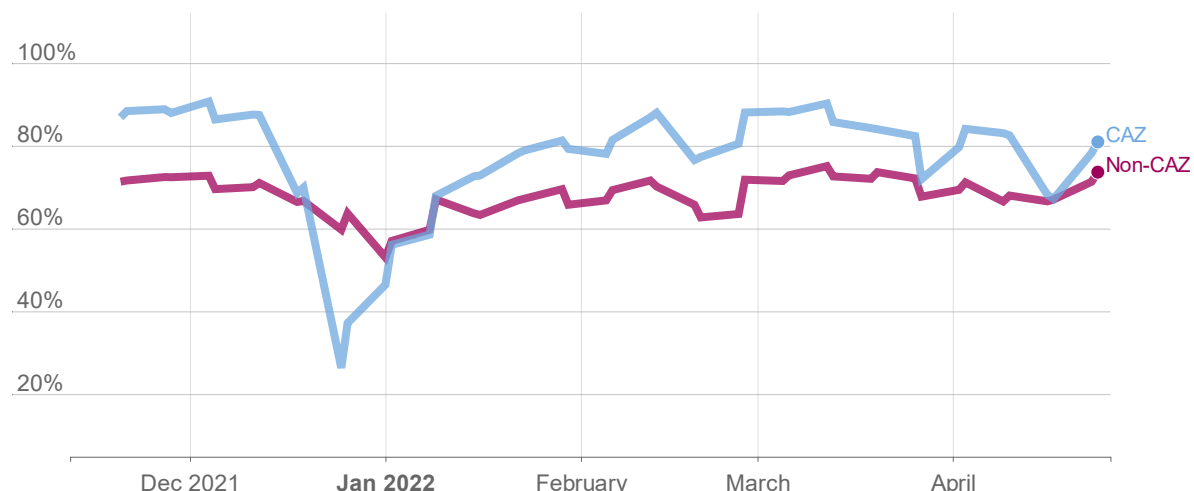
Source: Anonymised and Aggregated data by O2

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 during January 2022, and by April 2022 averaged 78% of pre-Covid-19 levels in the CAZ and 69% of pre-Covid levels outside of the CAZ.

6: CRIME & SAFETY

This chapter explores a range of indicators related to crime and safety, 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 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 Dashboard, the NFIB Fraud and Cyber Crime Dashboard, and the MPS 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 viewed in the context of pre-pandemic trends.

Figure 1: Total Notifiable Offences
Number of offences recorded by the MPS
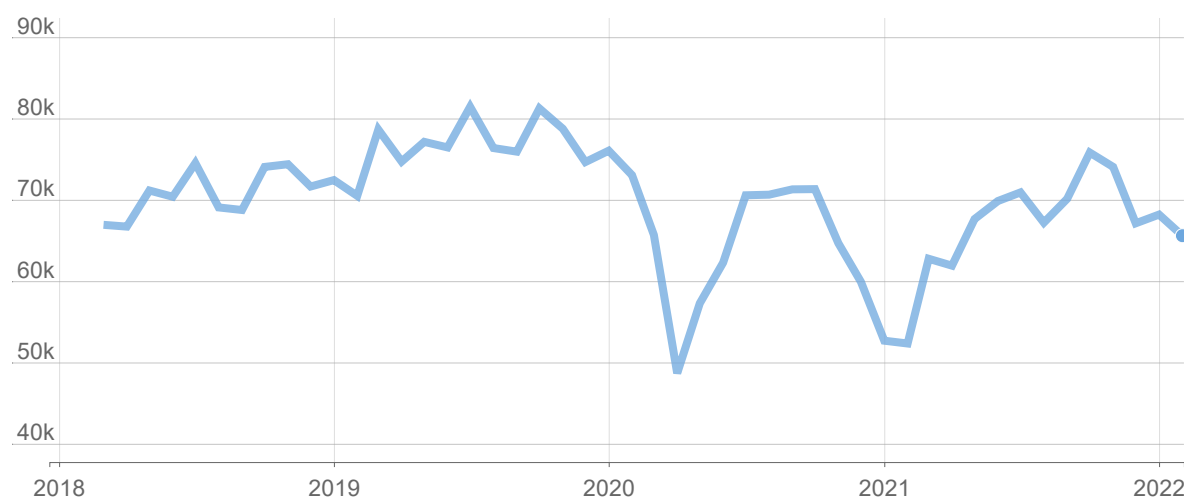
Source: MOPAC (Mayor's Office for Policing and Crime) Crime Dashboard.

It is evident that the pandemic and associated lockdowns have impacted heavily upon the crime levels within London over the last few years. As shown above, total crime (Total Notifiable Offences), has displayed profound reductions during these times. However, due to the complexity of the situation, combined with the nuances of the various crime types included within this over-arching category, differential impacts have been observed across the individual crime types. The Mayor's priorities and objectives for policing and crime are set out in the Police and Crime Plan for London 2022 to 2025.

Violence

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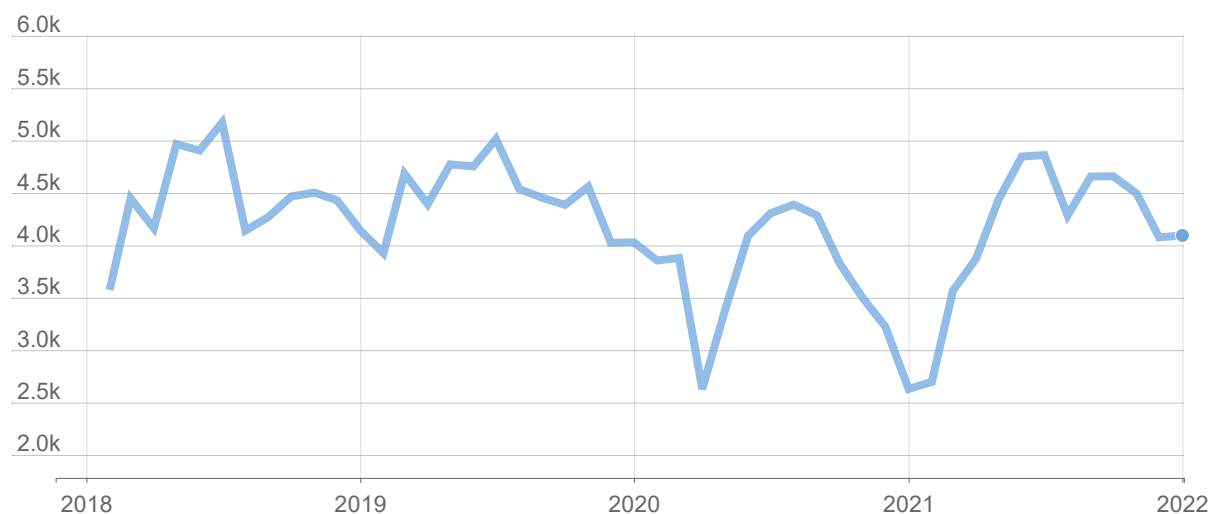
Source: MOPAC (Mayor's Office for Policing and Crime) Crime Dashboard. The above chart does not include any offence that has been flagged as being a Domestic Abuse (DA) offence.

Between February 2018 and March 2020, while the amount of non-DA violence with injury offences fluctuated across months, all monthly totals were within 20% of the relevant two-year mean. This resulted in a flat trend during this three-year period.

At the start of the pandemic, a significant reduction in violence with injury offending was then observed, with April 2020 recording 32% fewer offences than the previous month.

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.

Figure 3: Domestic Abuse Offences
Number of offences recorded by the MPS
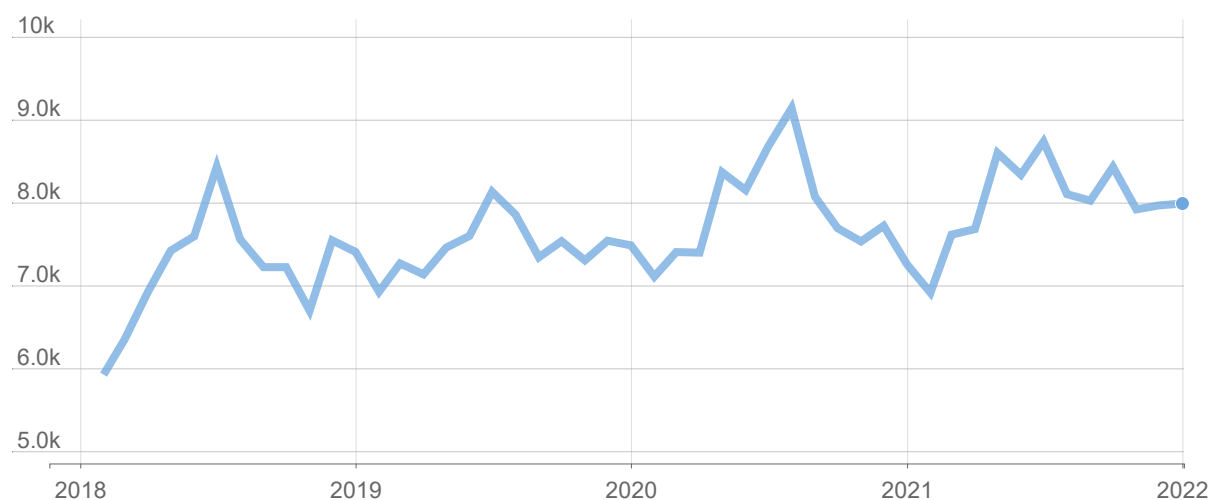
Source: MOPAC [Domestic and Sexual Offences Dashboard](). The data in the chart refers to Domestic Abuse Offences, not Domestic Abuse Incidents. Please note that there is no specific offence of Domestic Abuse. Domestic abuse-related offences are defined as any incidence of threatening behaviour, violence 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.

Domestic Abuse continues to be under-reported to the police. Caution should therefore be undertaken when considering the trends in Domestic Abuse across time, as fluctuations could be either attributed to changes in victim reporting levels, actual changes in the number of incidents/offences, or a combination of both.

Since February 2018, Domestic Abuse Offences[18] have shown a gradual upward trend, with several clearly identifiable spikes in offending. Although, not shown in the above chart, this trend was also replicated for Domestic Abuse Incidents[19].

Domestic Abuse Offences increased in the summer months of July and/or August in each of the featured years; with the highest peak shown in August 2020.

Overall, in 2021, Domestic Abuse Offences were 1% higher than in 2020, and 7% higher than in 2019.

Domestic Abuse Offences continue to disproportionately affect certain victim groups, with three-quarters of the victims being female.

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

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[18] Incidents of domestic abuse that resulted in a crime being recorded by the police and are included in police recorded crime.
[19] Domestic Abuse that has been reported to the police, but following investigation, does not amount to a crime or offence according to the National Crime Recording Standards.

has also fallen, reducing across the last five consecutive years (54,515 prosecutions in 2020-21).

Figure 4: Sexual Offences

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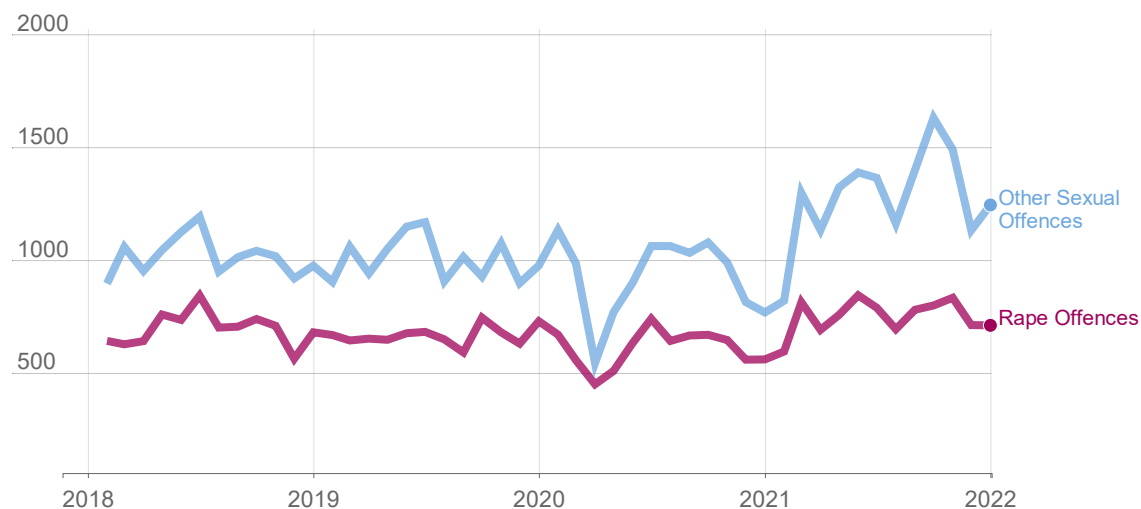
Source: MOPAC Domestic and Sexual Offences Dashboard. The chart distinguishes between Rape Offences and Other Sexual Offences, which when combined are referred collectively as "Sexual Offences."

Like Domestic Abuse, not all Sexual Offences are reported to the police. As such, the same caveat around interpreting the offending trends is applicable here. Increases in the number of recorded Sexual Offences could be due to increased reporting by the victims, increased offending, or an amalgamation of the two reasons.

As shown in the above chart, the monthly levels of Rape and Other Sexual Offences were consistent between February 2018 and March 2020, before sharp decreases in April and May.

The closure of the hospitality sector during the lockdown periods, combined with a significant reduction in footfall within public areas and on public transport as well as limited opportunities for social engagement are likely to have contributed heavily to these reductions in offending.

However, by June 2020, the monthly volume of both Rape and Other Sexual Offences were once again comparable to pre-pandemic levels, with stable levels of offending then shown until February 2021.

In March 2021, substantial increases in both types of sexual offences were recorded, with a 58% increase from February to March for Other Sexual Offences and a 37% increase during the same comparison period for Rape offences. While it is difficult to disentangle the impact that the pandemic has had on the levels of sexual offending, this notable increase aligns with the media coverage of the high-profile incident involving Sarah Everard that resulted in a protest calling for an end to violence against women and girls.

Despite the remainder of 2021 presenting elevated levels of sexual offending, (particularly for Other Sexual offences), a highly significant peak in offending was shown in October. This month documented the highest ever number of Other Sexual offences on record.

Figure 5: Non-Domestic Knife Crime with Injury Offences – Victim U25
Number of offences recorded by the MPS
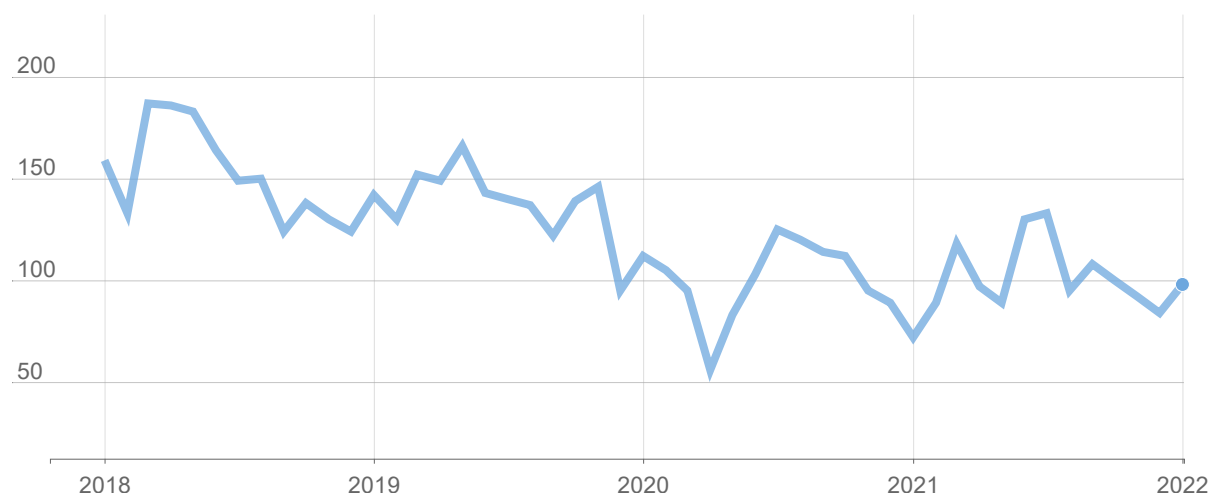
Source: MOPAC Weapon-Enabled Crime Dashboard. The above data refers only to offences where a victim is under the age of 25 and has been injured in a Non-Domestic Abuse knife incident. Please note, however, that the age qualifier only refers to the victims, meaning that the offender(s) may be aged over 25.

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

However, a further, more pronounced drop in victim levels was aligned to the beginning of the pandemic in April 2020, which recorded 59% fewer victims (56 victims) than the preceding 24-month average (138 victims).

From June 2020, the monthly volume of victims quickly aligned back to a downward trend, although a series of small increases and decreases can be further observed through the remainder of the period represented above.

The reduced opportunities for both public space engagement and the consumption of alcohol outside of one's private residence during the lockdowns are likely to have contributed to this reduction in young victims of non-domestic knife crime.

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Figure 6: Homicide Offences

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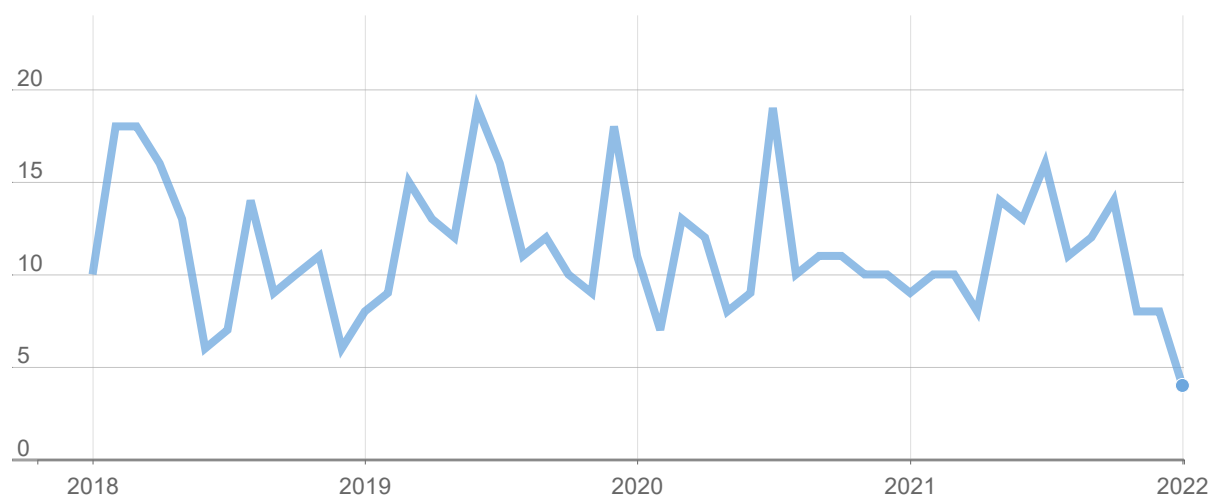
Source: MPS (Metropolitan Police Service) Crime Data Dashboard

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.

While the number of Homicides recorded between August 2020 and April 2021 was in-line with the overall mean for the full 49-month period (mean of 11%) being considered, this was immediately followed by a six-month period in which the monthly Homicide levels were consistently higher than the mean.

Across the full comparison period, noticeable fluctuation was shown in the proportion of Homicides denoted as being Domestic Abuse in nature, ranging from 4% in Q2 2016-17 to 33% in Q3 2017-18.

During this same period, the percentage of Homicides involving a knife/sharp instrument has increased from 60% to 69%, as has the proportion of victims under the age of 25 (currently sitting at 41%).

Males continue to be consistently over-represented as Homicide victims (around three-quarters of all victims).

Acquisitive Crime

Figure 7: Personal Robbery
Number of offences recorded by the MPS
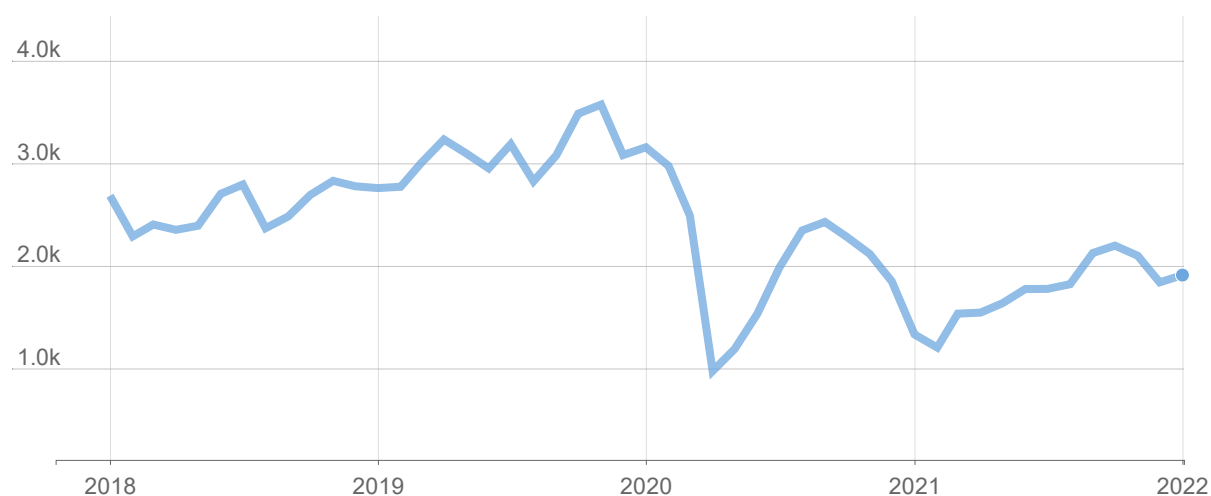
Source: MOPAC Crime Dashboard.

An upward trend in Personal Robbery offending was shown throughout 2018 and most of 2019, before the offending began to drop at the start of 2020.

Personal Robbery decreased sharply at the onset of the pandemic, reducing by 61% between March and April 2020.

Levels of offending then rose back towards pre-Covid levels before falling again between September 2020 and February 2021.

The levels of Personal Robbery recorded before the pandemic have yet to be reached, with January 2022 experiencing a third fewer offences than January 2019 (31%).

As the above-described Personal Robbery reductions align so closely to the active lockdown restriction periods, it is likely that the reduced footfall during these times has been a major contributor to these reductions.

Figure 8: Burglary Offences

Number of offences recorded by the MPS
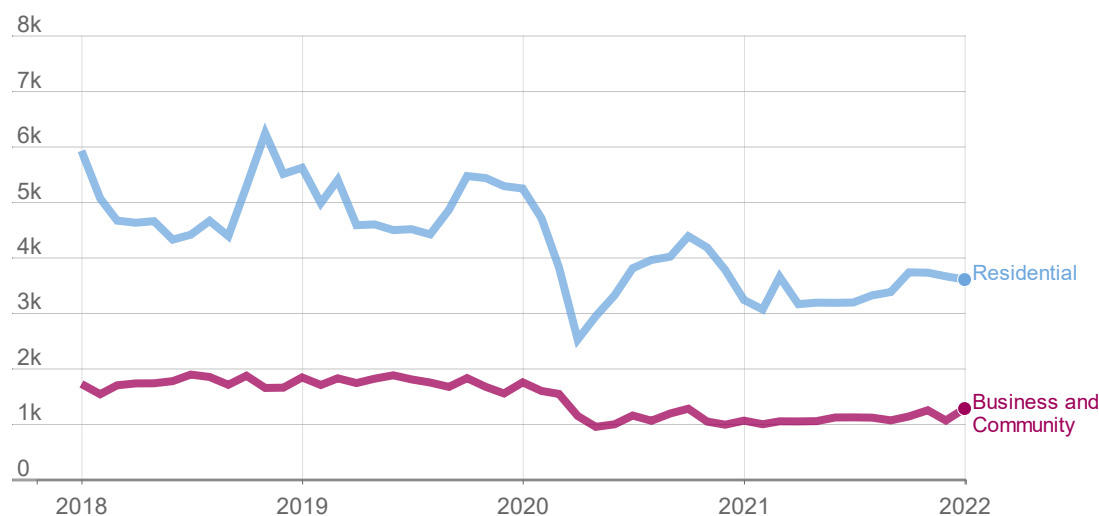
Source: MOPAC Crime Dashboard. As per the chart, the category of Burglary offences comprises of a combination of Business and Community Burglaries (Non-Residential) and Residential Burglaries.

Prior to the outset of the pandemic, both Residential 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 Residential 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-Covid levels; although there are some indications of a gradual increase in offending levels, with Residential Burglary offending showing an upward trend since February 2021.

Figure 9: Theft from Motor Vehicle Offences

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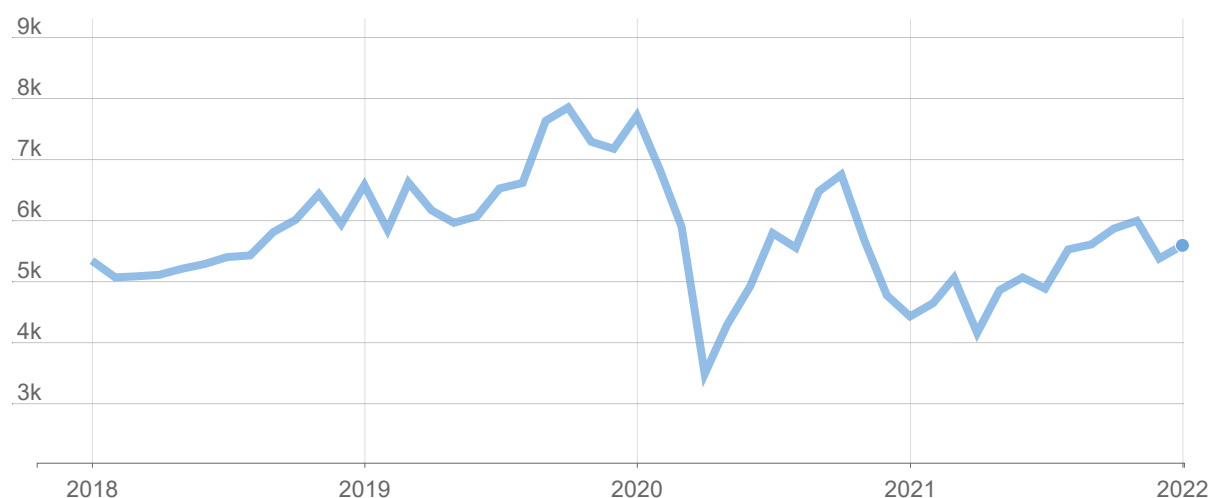
Source: MOPAC Crime Dashboard.

Theft from Motor Vehicle offending represented an upward trend through both 2018 and 2019, before exhibiting a downward shift at the start of 2020, which continued until April.

The volume of Theft from Motor Vehicle offending then rose, peaking in October 2020, prior to a sharp decline in offending following the second national lockdown.

The most recent data show the monthly levels of Theft from Motor Vehicle offences continue to be just below those recorded in early 2019.

During the pandemic lockdowns, due primarily to large numbers of people working from home and adhering to the advice to only make essential journeys, there was a notable reduction in vehicles travelling into London (see the Transport chapter for more information), and subsequently parking within London.

For instance, significantly fewer people would have been parking at train/tube stations, shopping centres and entertainment complexes during this time. This is likely to have had some impact upon the availability of vehicles to target at these higher-risk venues.

Figure 10: Theft from Person Offences

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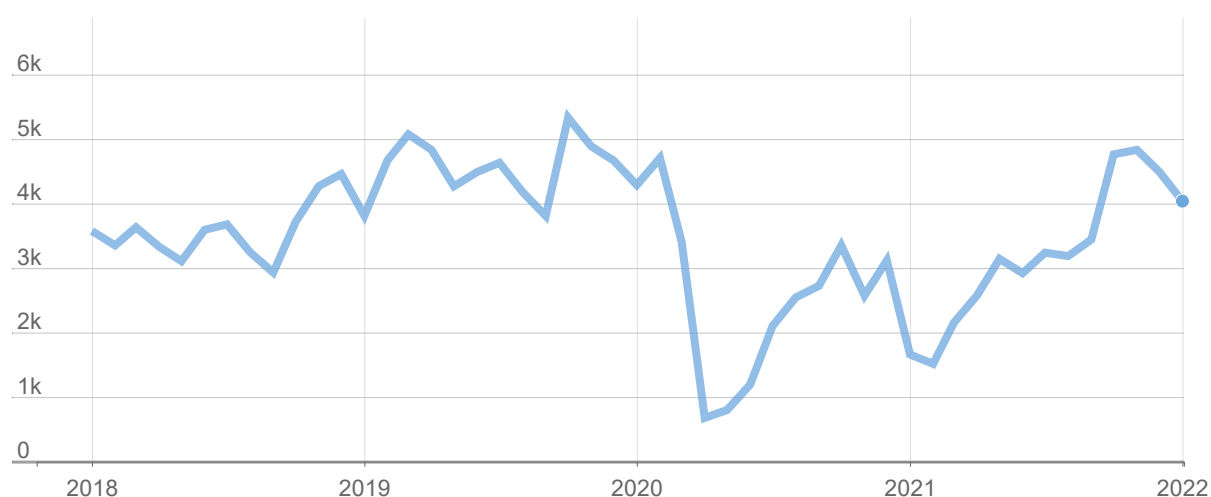
Source: MOPAC Crime Dashboard.

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).

The diminished numbers of people travelling into the capital for work and leisure during the pandemic, combined with the closure of hospitality venues during the lockdowns has severely limited the opportunities for Theft from Person offending, and as a result will have contributed heavily to the reductions displayed above.

However, following this significant decrease in offending, the monthly offence levels have gradually increased, albeit in January and February 2021, when a temporary dip in offending was shown.

Since May 2021, continuing to current 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
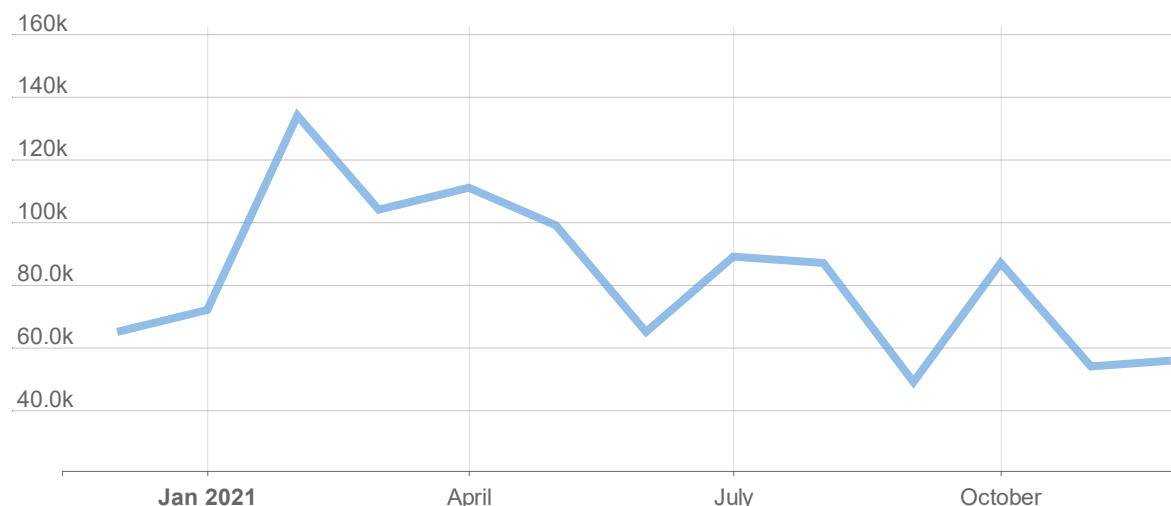
Source: [NFIB Fraud and Cyber Crime Dashboard](). Only fraud and cyber-crime offences that constitute a crime under the Home Office Crime Recording rules are included. Note: data is only provided on the dashboard for the most recent 13-month period, hence the limited timeseries presented on the chart.

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.

While the reports were categorised into eight distinct types of fraud, the most prevalent type was consumer fraud – accounting for over a third of the total fraud reports (36%).

During the 13-month period represented above, there was a combined total of 79,962 reports, of which 93% related to fraud (74,240 reports) and the remaining 7% related to cyber-crime (5,722 reports). Collectively, these incidents resulted in a total reported loss of £552m.

Overall, individuals were victimised much more frequently than organisations (90% versus 10%), with no notable difference in these proportions when the fraud and cyber-crime reports were considered separately.

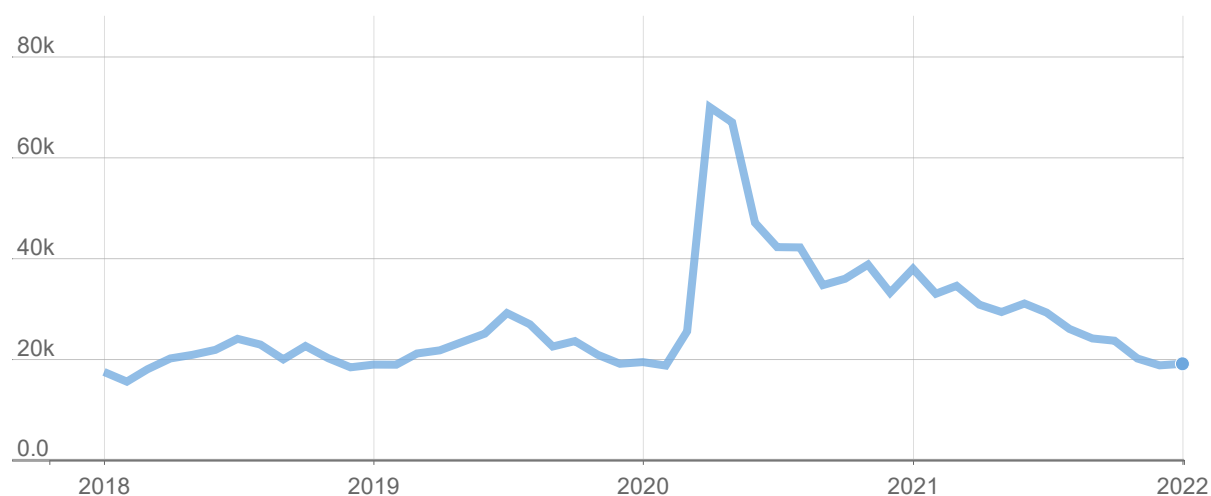Individuals aged 20-29 years and 30-39 years were most likely to be victims of fraud and cyber-crime offences, while no gender differences in victim prevalence were shown.

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.

The total Anti-Social Behaviour (ASB) calls received by the MPS are a combination of Personal ASB (when a person targets a specific individual or group), Nuisance ASB (when a person causes trouble, annoyance or suffering to a community) and Environmental ASB (when a person's actions affect the wider environment, such as public spaces or buildings).

The vast majority of ASB calls consistently relate to Nuisance ASB (90% over the last four years).

Between January 2018 and February 2020, the monthly levels of ASB calls were stable; with the usual seasonal increases in July and August and the seasonal reductions between December and February both represented.

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.

These increases can in part be explained by large numbers of Covid-19 related calls being classified as Nuisance ASB at the start of the pandemic; before a specific dedicated code was introduced by the MPS to denote activity related to the pandemic.

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, returning to normal levels in November.

Figure 13: Harassment

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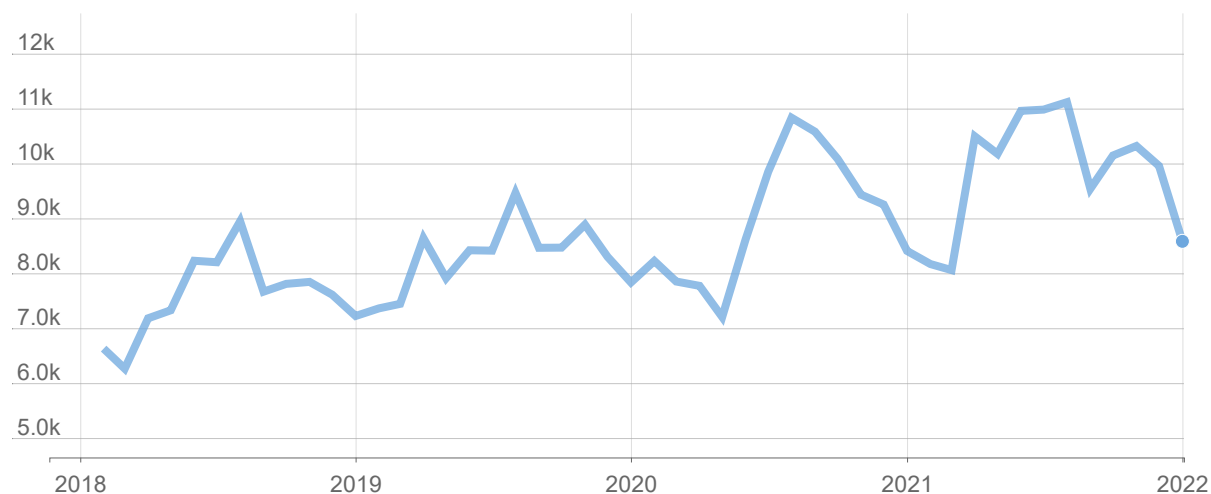
Source: MOPAC Crime Dashboard.

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

While overall offending levels continue to remain elevated, January 2022 represented a 14% decrease in the level of Harassment offences recorded in December 2021.

Looking specifically at Stalking offences (a sub-set of Harassment offences), the number of offences recorded by the MPS have increased every year since 2014, with a 957% increase between 2014 and 2020.

While this increase can partially be explained by amendments in offence recording standards[20] *and* an increase in police officer awareness, there does also appear to be an *actual* increase in the number of offences being reported.

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[20] From April 2015 the Harassment offence category has been expanded to include additional offences that were previously non-notifiable (not included in police recorded crime). These are the offences of, "Sending letters (including emails) with intent to cause distress or anxiety" and "Disclosure of private sexual photographs and films (including on the internet) with the intent to cause distress or anxiety".

CITY INTELLIGENCE

Figure 14: Feeling of Safety after Dark

Percentage of survey participants (PAS) that feel unsafe walking alone in their local area after dark
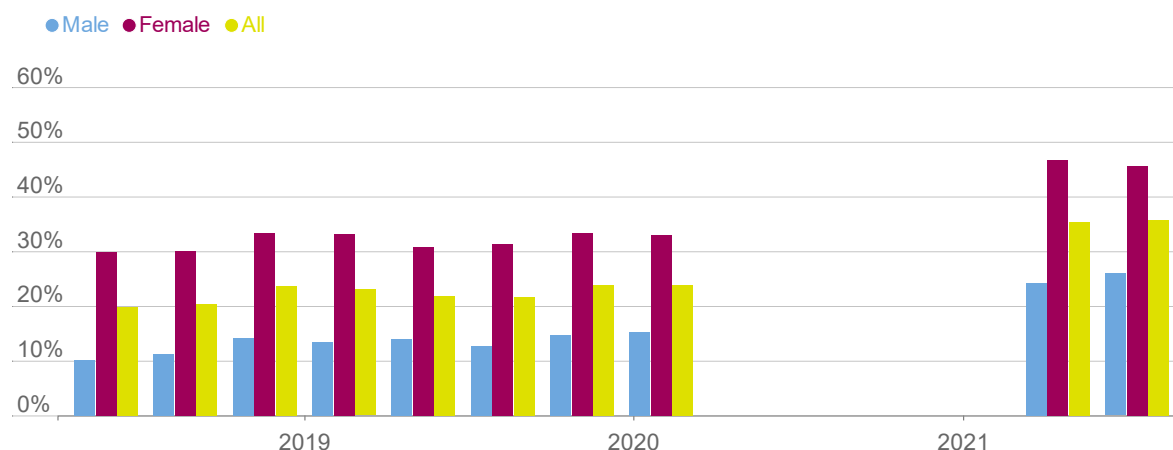
Source: MOPAC Public Attitude Survey. Note: data is only available for safety at night not during the day as well - there is no historical data yet for the newly added "safety in the day" question. Due to the pandemic, there is no data for 2020-21.

Overall, as shown in the above chart, a greater proportion of female respondents feel unsafe walking alone in their local area after dark than male respondents.

Prior to the pandemic, around a third of the female respondents reported feeling unsafe in the stated circumstances (ranging from 30% to 33%), with around one in eight male respondents sharing the same sentiment (between 10% and 15%).

Whereas, for the second and third quarters of 2021 (April-June and July-September), almost half of all female respondents (46-47%) and a quarter of the male respondents disclosed that they felt unsafe (24%-26%).

So, while feelings of being unsafe after dark have increased since the onset of the pandemic for both male and female respondents, the proportion of females feeling unsafe continues to be significantly higher than the equivalent proportion of males.

Figure 15: Satisfaction Level of Reporting Victims (MPS)

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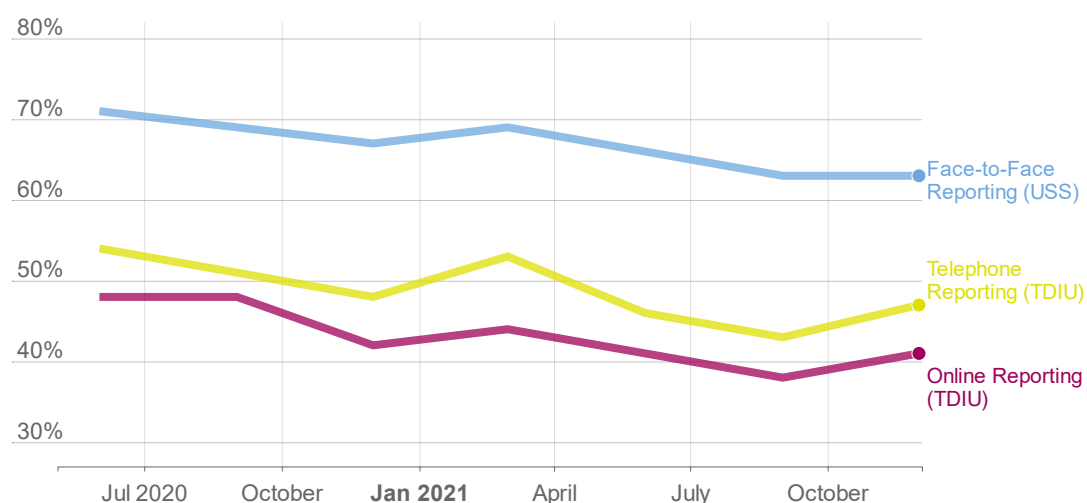
Source: MOPAC Public Voice Dashboard. Data sourced from the User Satisfaction Survey and the Online Victim Satisfaction Survey for Q3 2021-22. The demographic comparisons are based on the R12 period to Q3 2021-22. The chart shows victim satisfaction levels by three crime reporting methods (face-to-face,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

The victim satisfaction measure covers several distinct aspects of the service provided to the victim by the Metropolitan Police Service, namely their satisfaction with what the police did (police actions), how well they were updated (police follow-up), and how they were treated (police treatment), measured alongside their assessment of the overall service that they received (overall satisfaction).

While the overall satisfaction of victims in all three methods of crime reporting has decreased since the start of 2020-21, victims reporting crimes face-to-face continue to have a significantly higher level of satisfaction (63%).

The level of victim satisfaction across the three reporting methods varies by crime type. For both face-to-face reporting and online reporting, the lowest satisfaction levels related to Hate Crime offence reporting (58% and 21% respectively), whereas the lowest satisfaction level for telephone reporting was for Assault offence reporting (36%).

Overall, victims were least satisfied with the follow-up aspect of the crime reporting; with the treatment by the police officers being the aspect that victims were most satisfied with.

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

While victims from the LGBT+ community were less satisfied than other victims in all three methods of reporting, this disparity was most apparent for the online crime reporting.

White victims were most satisfied across all three reporting methods, with the discrepancy between the other ethnicities lowest for the phone method of reporting a crime.

Figure 16: Public Perception of the Metropolitan Police Service

Percentage of survey participants (PAS) who agree that the police treat everyone fairly regardless of who they are, and the percentage of survey participants (PAS) who think that the police do a good job in the local area
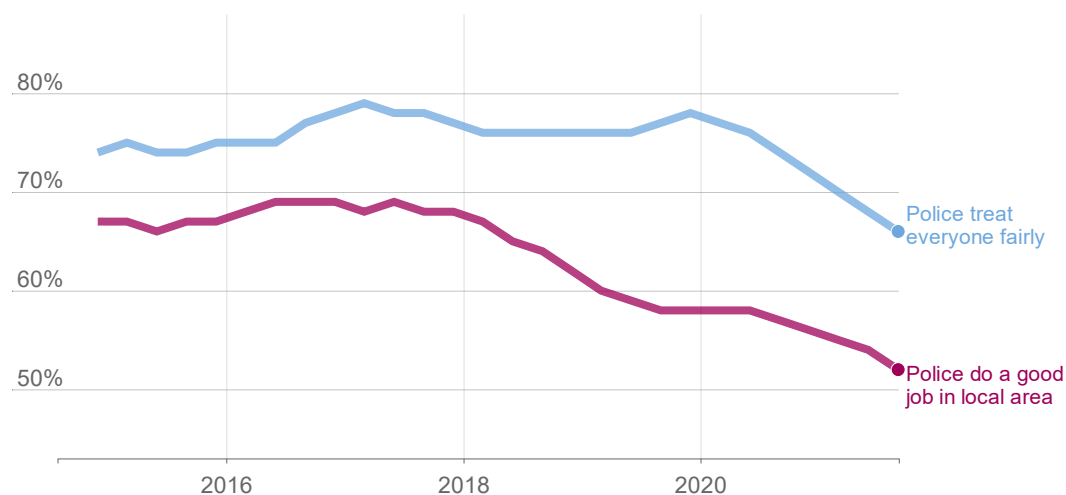
Source: MOPAC Public Voice Dashboard. Data sourced from the Public Attitude Survey (PAS). R12 month datapoints. Percentage of respondents who agree the MPS treat everyone fairly regardless of who they are, and percentage of respondents who think the police do a good job in the local area

The percentage of survey respondents who agree that the police treat everyone fairly, regardless of who they are, documents an initial upward trend from the end of 2014 through to March 2017, before a period of stability. Then, from December 2019 to September 2021, the data displays a sharp decline, with only two-thirds of respondents agreeing to the survey statement by the end of this date period (66%, down from 78% in December 2019).

Whereas the percentage of respondents who think that the police do a good job in the local area was relatively stable during the period December 2014 to March 2018, it then followed a downward trend that continued through until 2022.

During the most recent year, the agreement levels for both survey statements differed across the respondent demographics of ethnicity, age group, LGBT+ status and disability.

Survey respondents of Mixed and Black ethnicities had the lowest levels of agreement for both measured statements. Approximately half of both Black ethnicity (50%) and Mixed ethnicity (47%) respondents felt that the police indiscriminately treat everyone fairly. This reduced to around 40% when referring to their agreement that the police do a good job in the local area (Black ethnicity, 43%, Mixed ethnicity, 41%).

Young people had the lowest levels of agreement across the two statements being measured. A greater level of agreement was shown with each subsequent increment in age group for the measure looking at the indiscriminate fair treatment by police.

The proportion of LGBT+ respondents who agreed that the police indiscriminately treat everyone fairly was significantly lower than the proportion of non-LGBT+ respondents (52% versus 65%). For the second measured statement, the level of agreement amongst LGBT+ respondents (46%) was also lower than that of the non-LGBT+ respondents (49%), although the disparity between the two groups was less apparent.

For both measured statements there was also a small differential between the rate of agreement between respondents with a disability and those without a disability. The proportion of respondents with a disability who agreed that the police indiscriminately treat everyone fairly was 61%, compared to 65% of respondents without a disability. While 47% of respondents with a disability agreed that the police do a good job in the local area, compared to 49% of respondents without a disability.

7: THE ENVIRONMENT

This chapter provides information on the state of London's environment covering latest data on greenhouse gas emissions, air quality, recycling rates, and the energy efficiency of buildings.

As with other chapters, the aim is to provide indicators that give as up-to-date a picture as possible in these policy areas. For some domains such as air quality, there is 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 key to understanding a particular topic have been included for completeness.

For more information about the Mayor's plans to tackle London's environmental challenges, see the London Environment Strategy. Additional data resources by topic can be found below:

Greenhouse gas emissions (GHG)

The National Atmospheric Emissions Inventory (NAEI) Local Authority CO2 interactive map shows the concentration of CO2 emissions across the UK in 2019. Although the NAEI 2019 includes the latest available data on CO2 emissions in London, the Greenhouse Gas (GHG) emission indicator shown below is based on the London Energy and Greenhouse Gas Inventory (LEGGI) 2018. LEGGI provides data on all GHG emissions (rather than just CO2), updates yearly rather than three-yearly, and includes a breakdown by sector and borough. GHG data carries a two-year lag due to the need for combining different methodologies and reconciling multiple primary data sources to derive estimates.

Air quality

The London Air Quality Network provides a London-wide map showing the hourly concentration of air pollutants.

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

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. 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.

Greenhouse Gas Emissions

Figure 1: Greenhouse Gas emissions in London
Megatons of CO2 equivalent
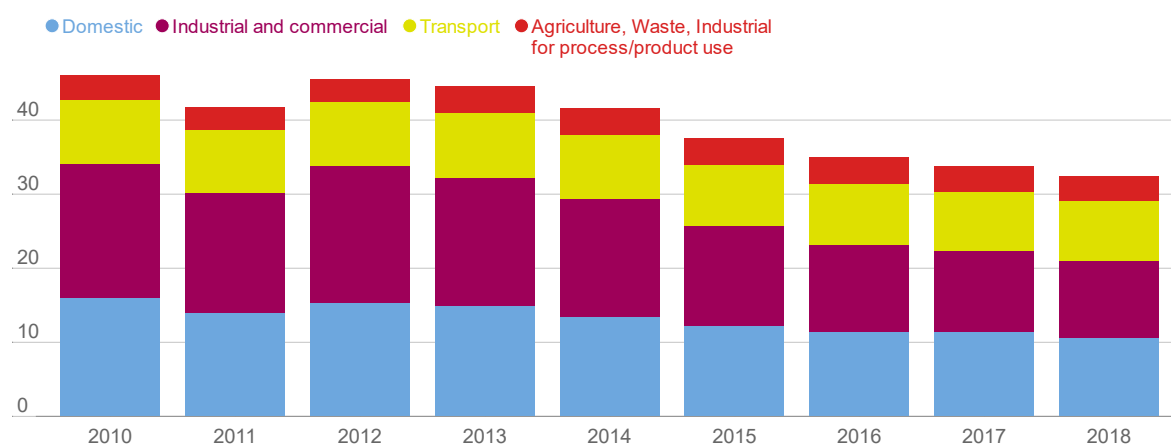
Source: GLA, LEGGI 2018

The London Energy and Greenhouse Gas Inventory data shows yearly emissions in London by source up to 2018.[21,22]

In 2018, emissions from domestic activities and industrial and commercial activities represented 33% and 32% of total emissions in London respectively, followed by transport (25%) and other sources (10%).

Between 2014 and 2018 emissions fell by over a fifth to 32.4 MtCO2e, at a rate of approximately 2.3 MtCO2e per year. Commercial and industrial activities (excluding process and product use) achieved the greatest reduction in emissions - a 35% fall in five years.

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[21] The next LEGGI release is due to be published in 2022 with 2019 data. For ease of reporting, the different GHG emission levels are converted into CO2 emissions levels that have an equivalent potential for global warming. The measurement unit is hence named tonnes of CO2 equivalent, or tCO2e – see HM Government, Environmental Reporting Guidelines.

[22] As mentioned in the introduction, more recent data on CO2 emissions (rather than GHG emissions measured in CO2e) is available for 2019. The dataset with London-specific time series by source can be found in the London Atmospheric Emissions Inventory (LAEI) 2019. 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.

Air Quality

Figure 2: Monthly average Nitrogen Dioxide concentration at the roadside
Micrograms per cubic meter (μg/m^3)
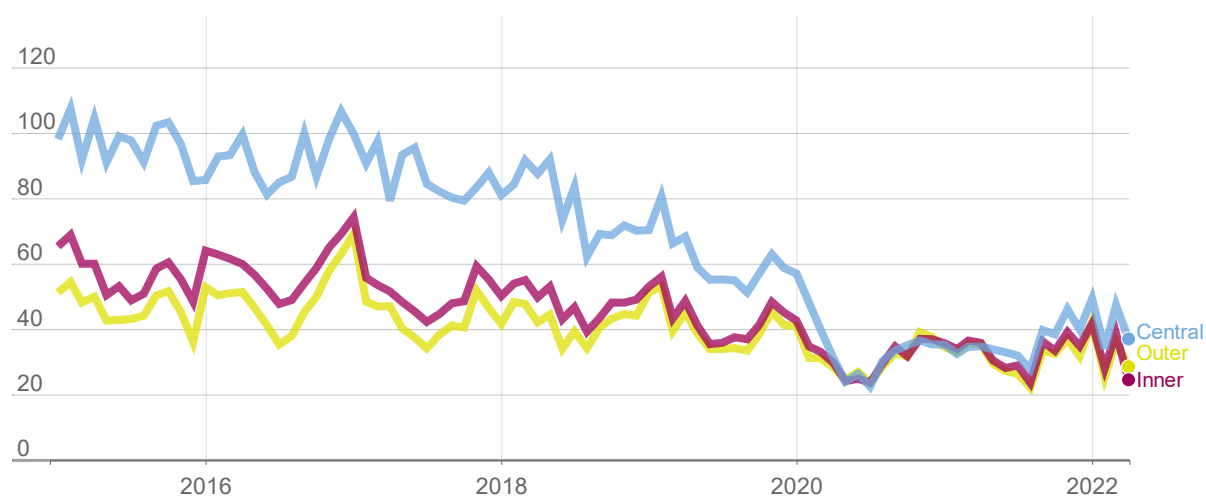
Source: London Air and Air Quality England. For the most up-to-date data see the Resilience Dashboard.

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. The annual legal UK limit is set at an average concentration of 40 μg/m^3 over a year, whereas the World Health Organisation's recommended limit is of 10 μg/m^3.[23]

Concentration levels across Central, Inner, and Outer areas of London have followed a downward trend since 2016, although they have fallen more rapidly in the central area than elsewhere.

Since the start of the pandemic, values have remained below the legal limits for over a year. Although the concentration of NO_2 has followed an upward trend since August 2021, the peaks reached in January and March 2022 remained below the concentration recorded during the same months of 2019. A combination of factors, such as seasonal variation (with higher concentrations in winter) and COVID19-related measures, could explain the recent upward trend.

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[23] 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 these are yearly limits, meaning that even if concentration of a pollutant exceeds the limit in a given month, the overall annual concentration for that pollutant could still be below the limit. 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.

Figure 3: Monthly average Nitrogen Dioxide concentration in the urban background
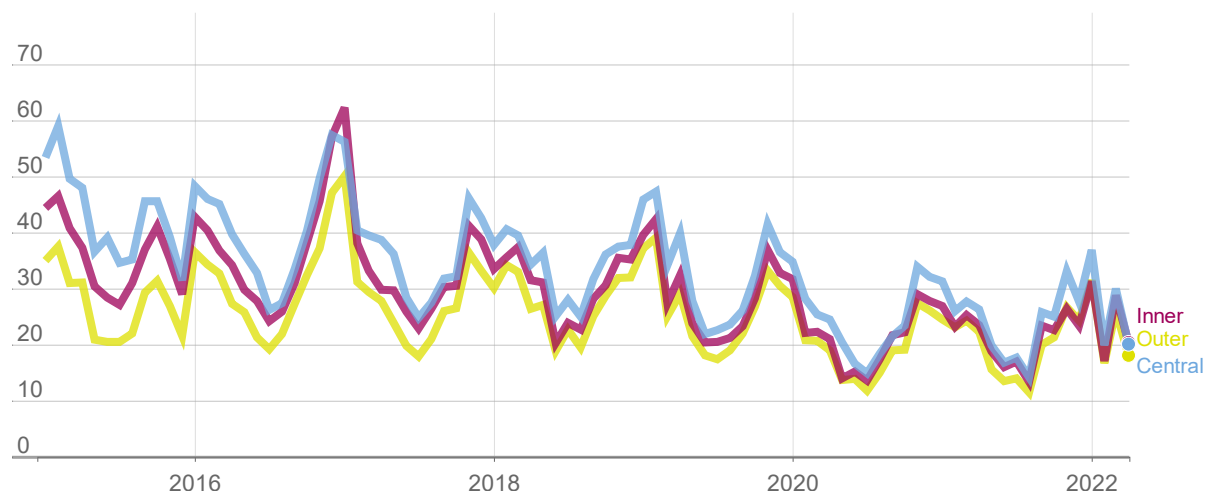
Micrograms per cubic meter (µg/m³)

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

Urban background NO$_2$ concentration is generally lower compared to roadside concentration and has remained mostly below the legal limits since 2016.

In contrast to roadside pollution, NO$_2$ concentration in the urban background has maintained at a relatively similar level across all the three areas over time.

Figure 4: Monthly average PM$_{10}$ particulate concentration at the roadside

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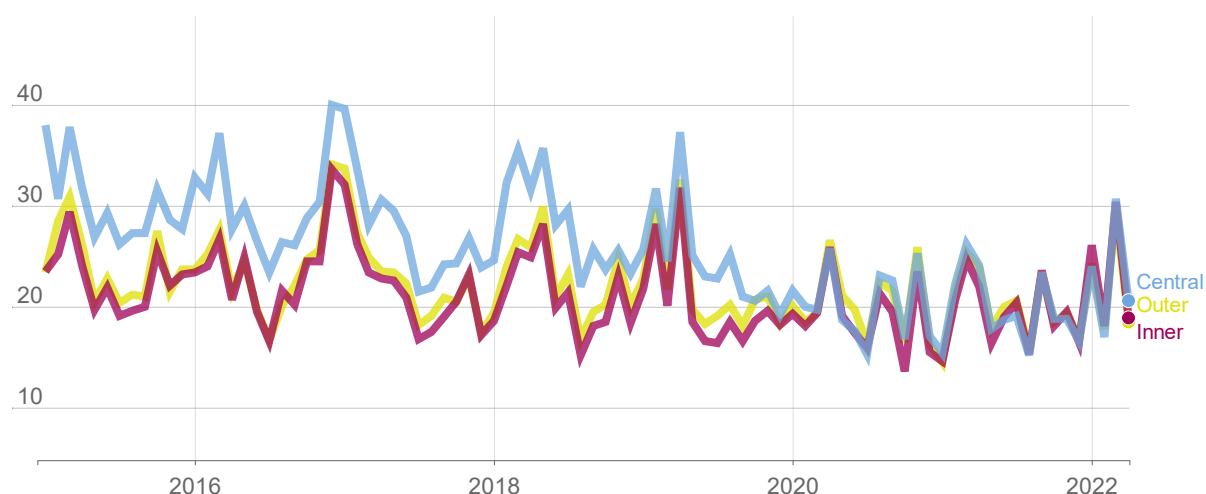
Source: London Air and Air Quality England. See up-to-date data on the Resilience Dashboard.

Particulate matter is a mix of non-gaseous material produced mainly by traffic's 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), with smaller particles having higher toxicity.

CITY INTELLIGENCE

The chart above shows the average concentration levels of particulate matter PM_{10} at the roadside for Central, Inner, and Outer areas in London per month.

Across all three areas, PM_{10} levels have remained below the legal limit of 40 μg/m^3 for over seven years. PM_{10} levels have also followed a persistent downward trend, although they have not fallen below the World Health Organisation's recommended level of 15 μg/m^3.

However, it should be noted that the fall in PM_{10} concentration appeared to slow in 2021, especially for Central areas, possibly due to the easing of early 2021 lock-down restrictions. Moreover, PM_{10} concentration in March 2022 has risen back to pre-pandemic levels for Inner and Outer areas, approximately matching those reached in February 2019.

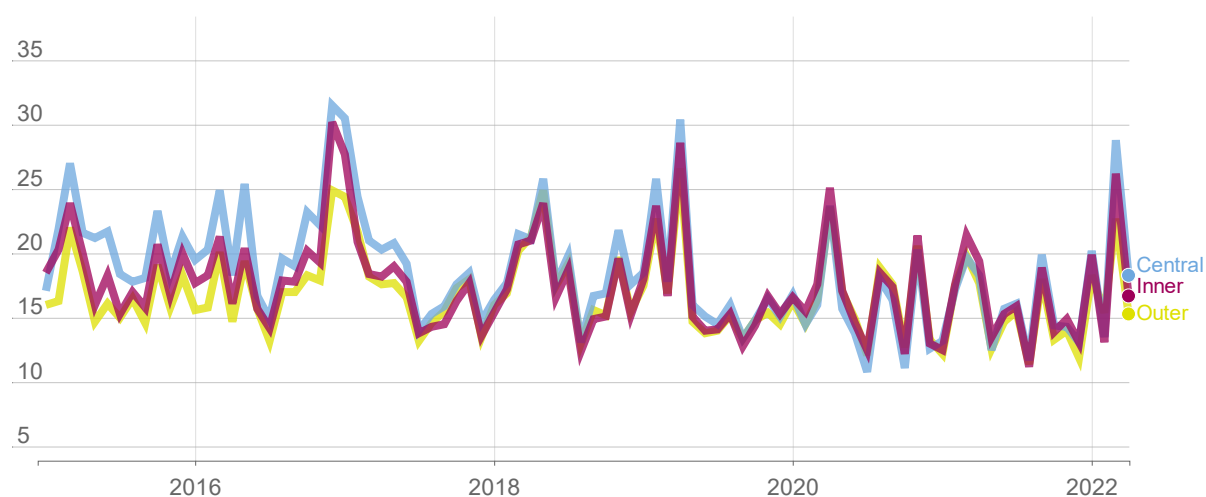**Figure 5: Monthly average PM_{10} particulate concentration in the urban background**

Micrograms per cubic meter (μg/m^3)

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

Consistent with measurements for NO_2, PM_{10} levels in the urban background are generally lower than those on the roadside.

Looking beyond the monthly fluctuations shown in the graph, the data indicate that the annual average concentration of the pollutant in the urban background has fallen since 2016 for all areas, although spikes were registered in winter 2016-17 and spring 2018. Notably, in March 2022, PM_{10} concentration in the urban background spiked in all areas and reached the third highest level recorded since 2015 in Central and Inner areas. Concentration in Outer areas also increased to the same level recorded in February 2019.

Figure 6: Monthly average PM$_{2.5}$ particulate emissions at the roadside

Micrograms per cubic meter (µg/m^3)

Source: London Air and Air Quality England. See the Resilience Dashboard for latest data.

PM$_{2.5}$ levels have remained below the legal limit of 25 µg/m^3 for over seven years, albeit above the World Health Organisation's recommended level of 5 µg/m^3.

Looking beyond the monthly fluctuations shown in the graph, 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. Overall PM$_{2.5}$ concentrations have decreased across all areas since 2015.

Consistent with PM$_{10}$ data, the concentration of PM$_{2.5}$ spiked in March 2022 to pre-pandemic levels comparable to those of February-April 2019.

Figure 7: Monthly average PM$_{2.5}$ particulate concentration in the urban background
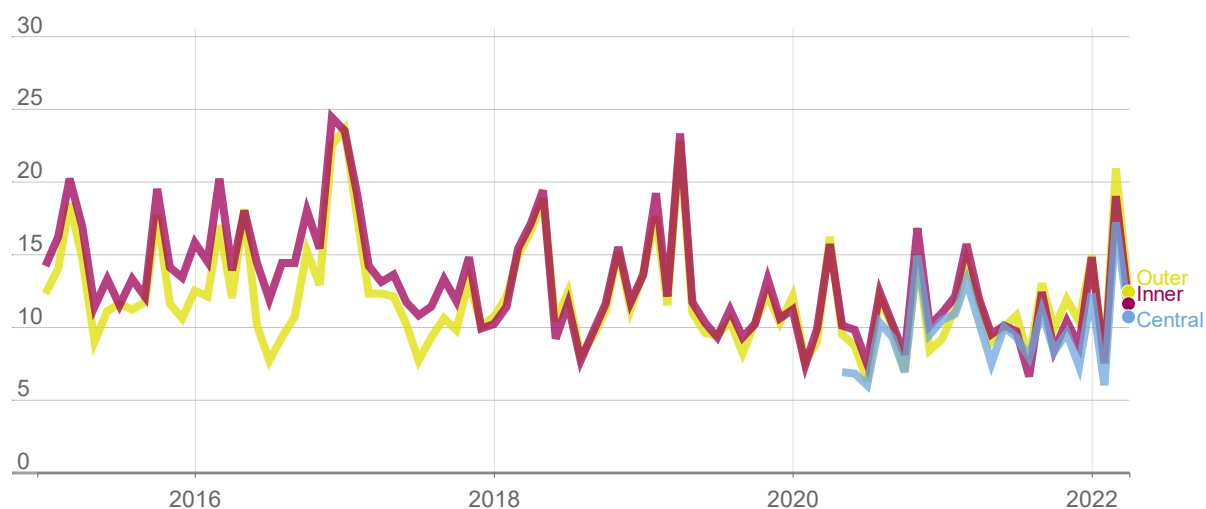
Micrograms per cubic meter (µg/m^3)

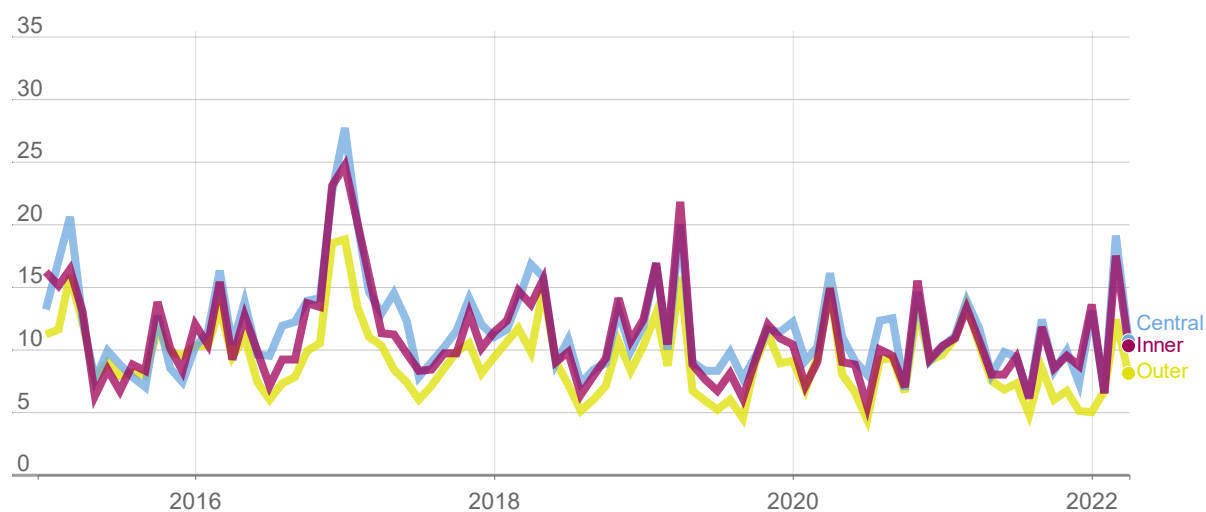*Source: London Air and Air Quality England. See the Resilience Dashboard for the latest data.*

The chart above shows the monthly average concentration levels of PM$_{2.5}$ in the urban background for Central, Inner, and Outer areas of London.

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.

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

Zero carbon circular economy

Figure 8: Household waste collected by Local Authorities
% of 2011/12 values
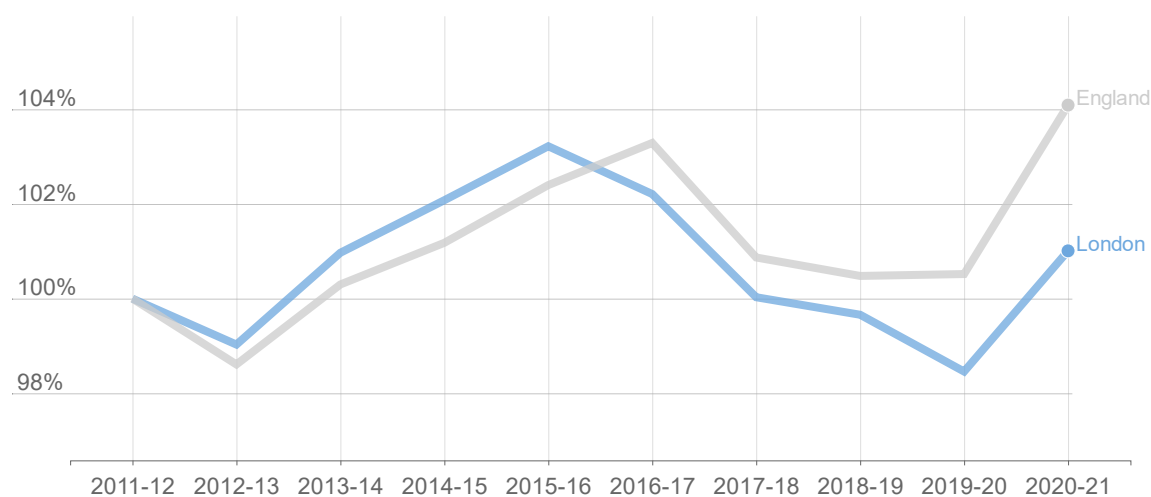
Source: DEFRA, ENV18 - Local authority collected waste (England and regions). Data is also available at the level of Local Authorities.

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.[24]

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 an effect could be potentially explained as an impact of lockdown restrictions and the increase in working from home arrangements.

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[24] The 'household waste' measure includes waste from street bins, street sweepings, gully emptying, parks and grounds waste, soil, and compost-like output, separately collected healthcare waste and asbestos.

Figure 9: Households waste recycling rate
% of collected household waste
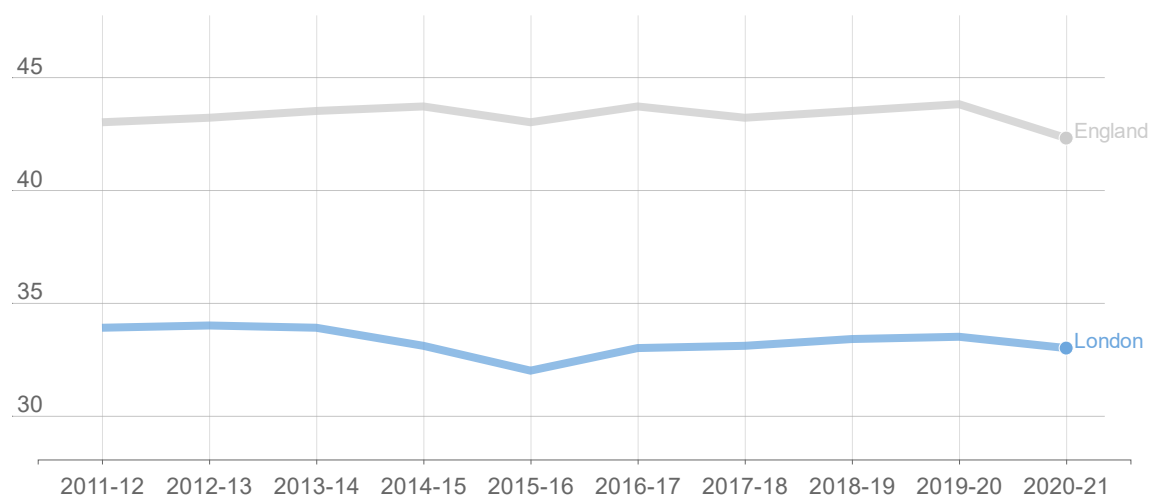
Source: DEFRA, [ENV18 - Local authority collected waste](#) (England and regions). Data is also available at level of Local Authorities.

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 42%. 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 the last year which includes the impact of the pandemic and lockdowns.[25]

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[25] London faces many challenges to achieving high weight-based recycling performance. For more information, see Mayor of London, [London Environment Strategy](#), May 2018, p. 281.

Figure 10: Lodgements with an Energy Performance Certificate rating of A-C

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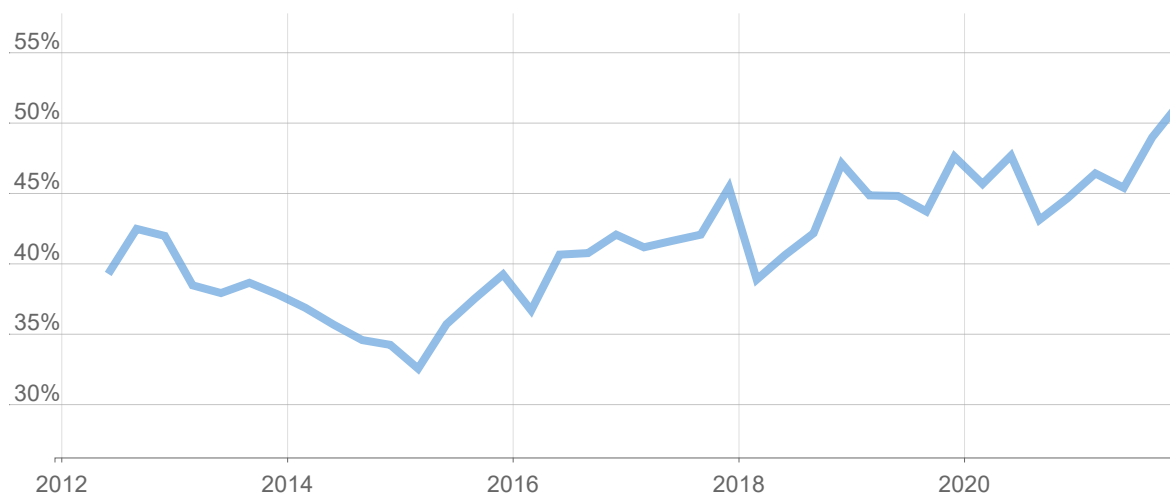
Source: DLUHC, MHCLG, Live tables on Energy Performance of Buildings Certificates, Table D1: domestic EPCs for all dwellings by energy efficiency rating. Data is also available at the level of Local Authorities.

Buildings 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 buildings (existing or newly built) are added to the Energy Performance of Buildings Register.[26]

The chart above shows the share of those buildings added to the register in a quarter with an efficiency rating of A-C. Data are based on experimental statistics.

Since the last quarter of 2014, the energy performance of buildings added to the register has been increasing steadily. The average share of buildings with a rating of A-C in 2021 quarters was nearly 19pp higher than the average share for the 2014-15 quarters.

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[26] 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)
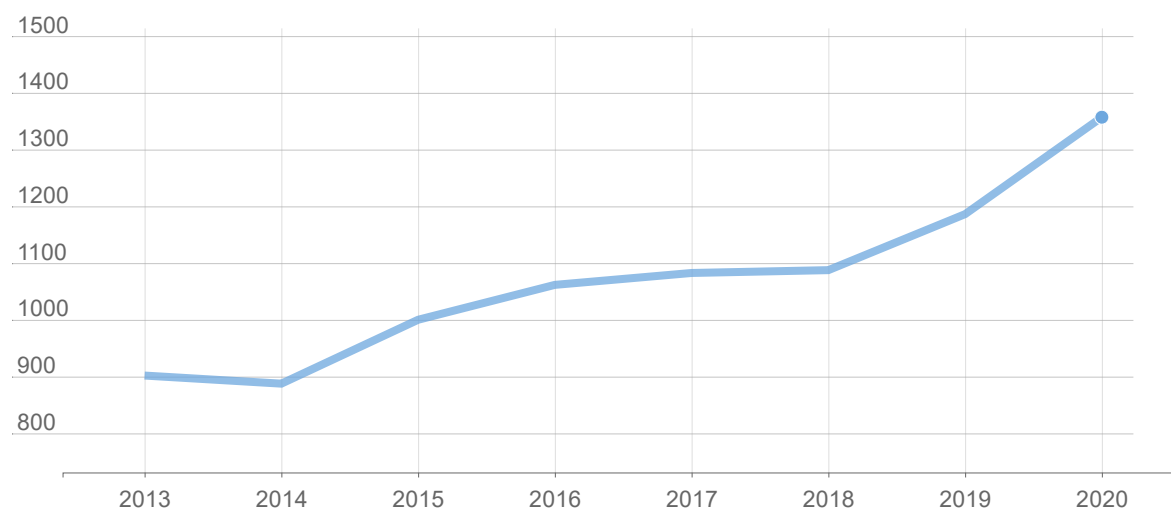
Source: BEIS, Regional Renewable Statistics, Regional Statistics 2003-2020: Generation. Data is also available at the level of Local Authorities.

The chart above shows that in 2020, about 1,350 GWh of electricity in London was generated by means of renewable sources, such as wind, photovoltaic, landfill and sewage gas, or other biomasses and waste. Over 2014-2020, renewable electricity generation in London increased by over 50% of 2014 values.

Total energy consumption in London in 2018 (the latest data available from the LEGGI) was close to 132,000 GWh, of which 38,000 GWh (29%) was electricity. The vast majority of London's energy demand is met from sources outside of the capital. Nationally, the share of electricity generated from renewable sources was 39% in 2021[27].

[27] BEIS (March 2022), 'Energy Trends Statistical Release 31 March 2022'

8: HOUSING

The [London Housing Strategy](#), published in May 2018, sets out the Mayor's vision for tackling London's housing crisis. This chapter sets out trends in a range of key housing indicators relevant to the policies in the Strategy, covering new supply, affordability and housing need.

The indicators covered here are all quarterly and recently updated, while the GLA's annual [Housing in London](#) report provides 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
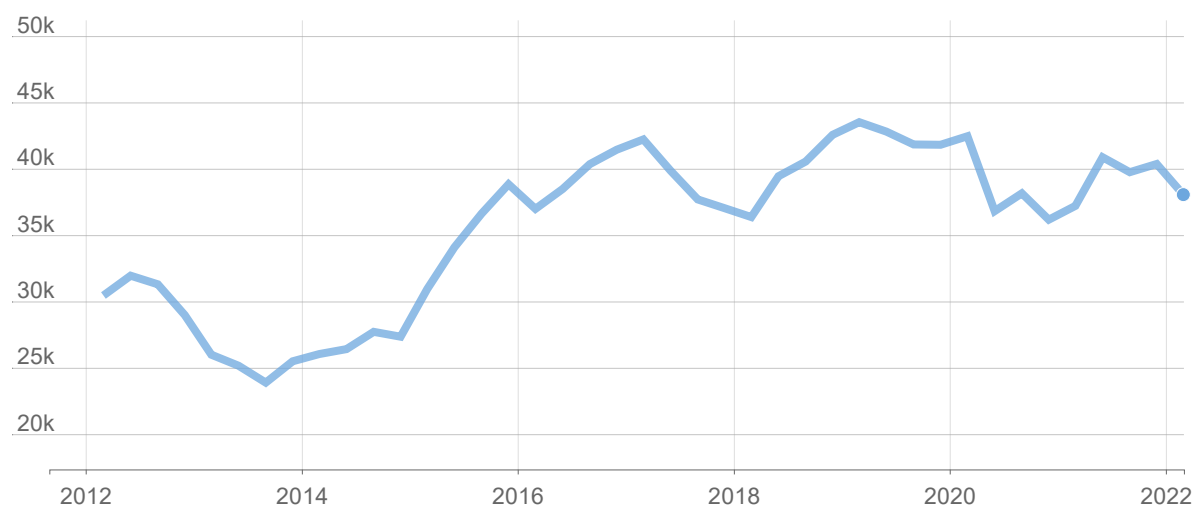
Source: [DLUHC EPC live table NB1](#)

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, which has largely tracked net conventional completions data over recent years.

There were 38,050 EPCs issued for new homes in London in the year to March 2022, up from 37,200 the previous year (when construction was disrupted by the pandemic) and slightly below pre-pandemic trends.

Figure 2: Annualised planning permissions for new homes in London

Number of planning permissions
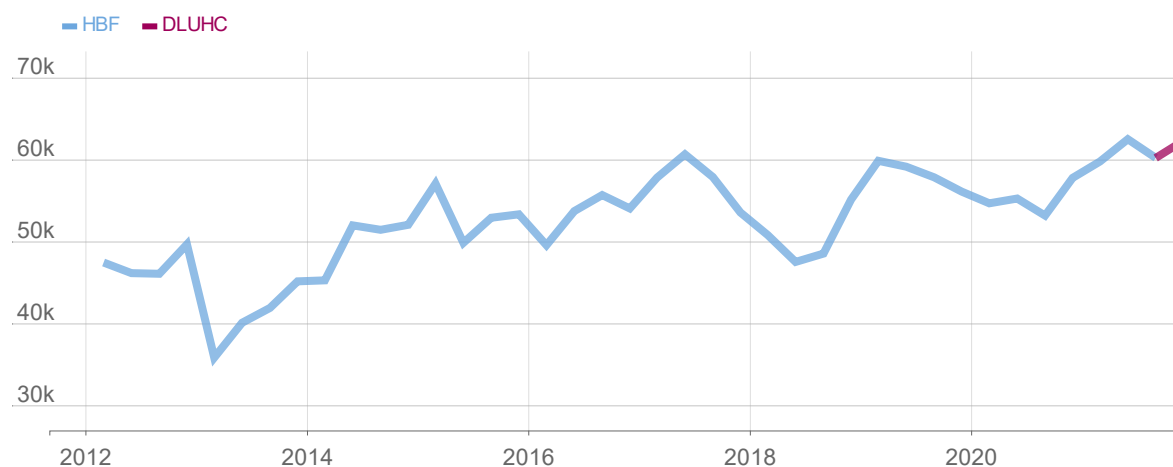
Source: HBF Housing Pipeline Report; DLUHC planning application statistics

DLUHC report the annualised number of new homes given planning permission on a quarterly basis, and according to their most recent figures there were 62,300 new homes approved in London in 2021, slightly above the pre-pandemic peaks.

Historic data consistent with the DLUHC statistics is reported by the Home Builders Federation in its Pipeline Report and shown in the chart. DLUHC began reporting data on the volume of permissions in its quarterly Planning Application Statistics in early 2021.

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
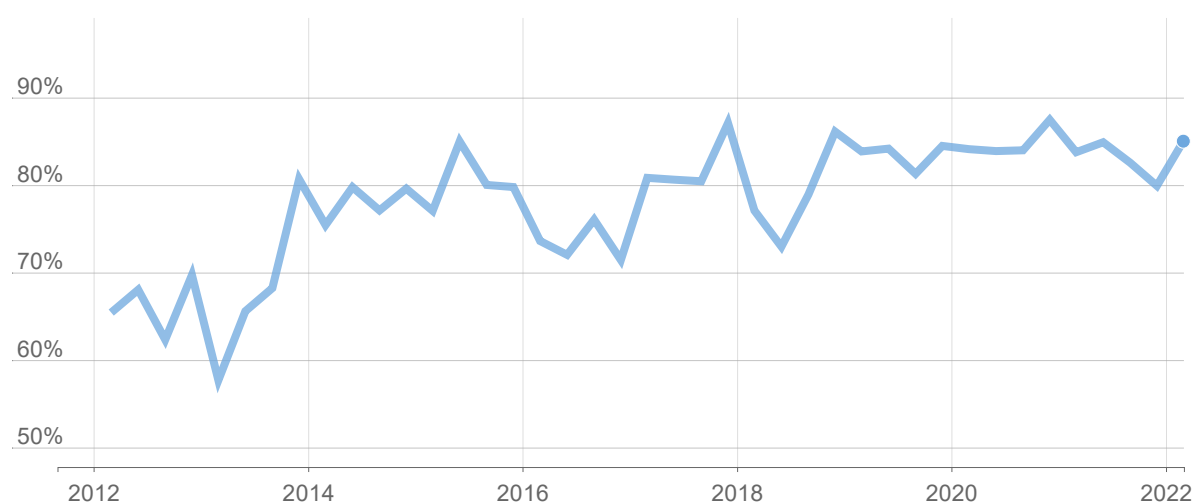
Source: DLUHC EPC live table NB1

According to data from Energy Performance Certificates, around 85% of new homes completed in London in Q1 2022 had an energy efficiency rating of A or B, up from between 60% and 70% in 2012.

Across England as a whole 82% of new homes completed had a rating of A or B in Q1 2022.

While these figures show the energy efficiency rating of new homes only, figures presented in the Environment chapter show the energy efficiency recorded on all EPC lodgements in London, of which the vast majority in any period are for existing rather than new homes.
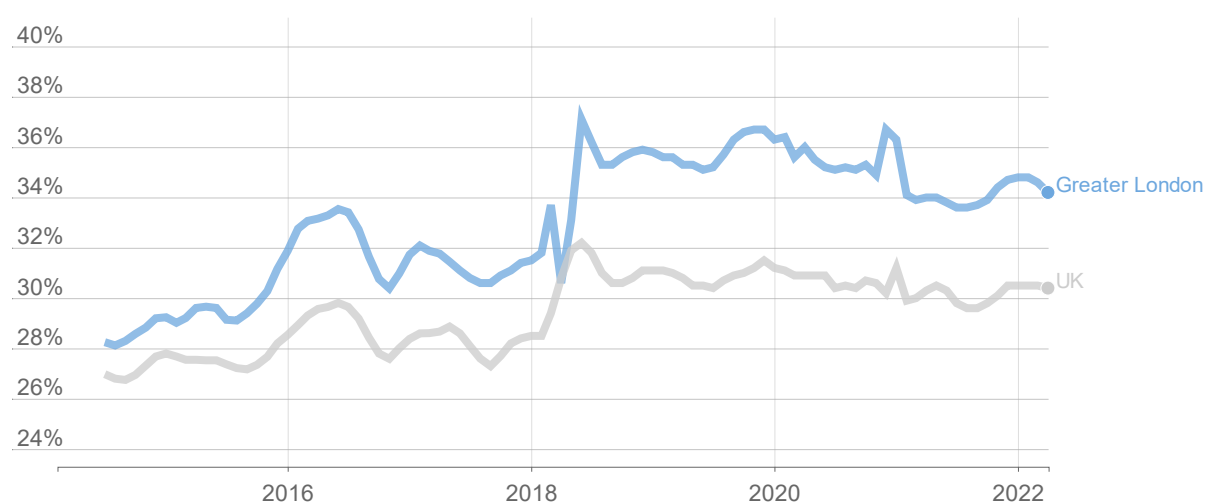
Figure 4: Private rent affordability

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 34.2% of tenant incomes in April 2022, below the last peak of 36.7% in December 2020.

Across the UK as a whole, private rents on new tenancies accounted for 30.4% 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
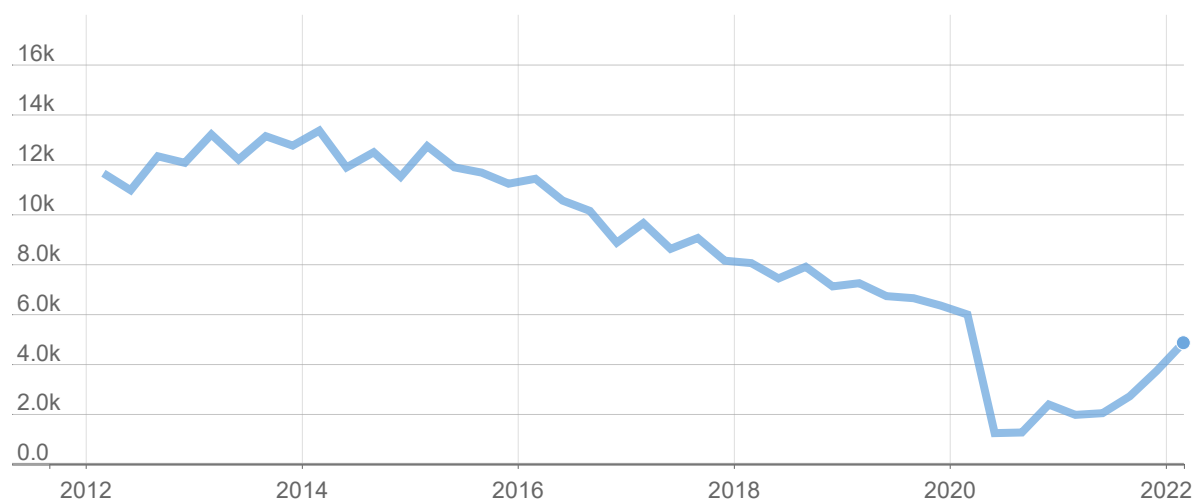
Source: MOJ mortgage and landlord possession statistics

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 4,850 in Q1 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
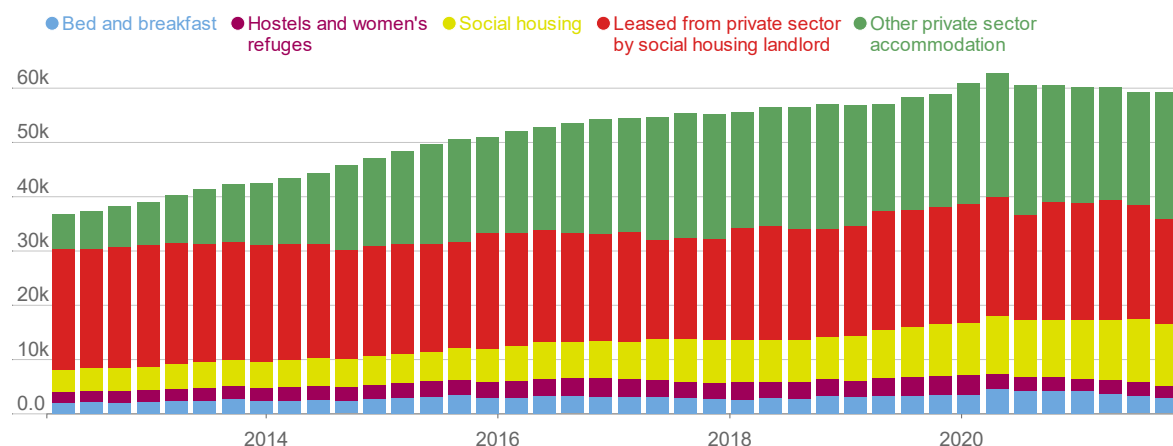
Source: DLUHC statutory homelessness local authority tables

At the end of 2021 there were 59,200 homeless households in temporary accommodation arranged by London boroughs, down from a recent peak of 62,650 in June 2020.

38,840 of the households accommodated in September 2021 had children, with a total of 76,610 children between them.

The number of households in bed and breakfast accommodation (2,930) has reduced after increasing sharply during 2020. At the end of 2021, 11,530 households were being temporarily accommodated in social housing, close to the highest figure ever recorded.

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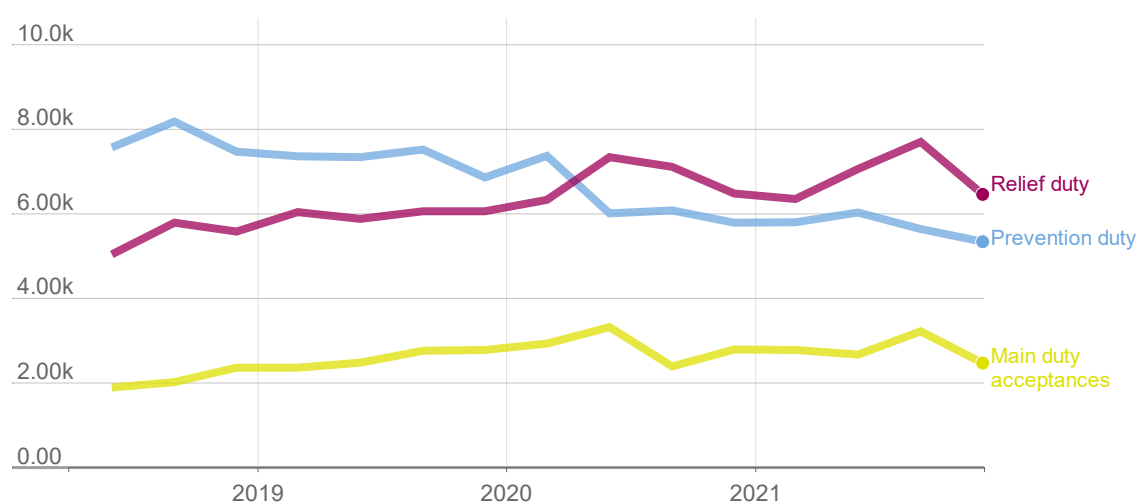
Number of households

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 11,780 households assessed as owed a new prevention or relief duty in London in Q4 2021, including 5,330 prevention and 6,450 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 2,460 households accepted as statutorily homeless by London boroughs in Q4 2021, the lowest figure since 2019.

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
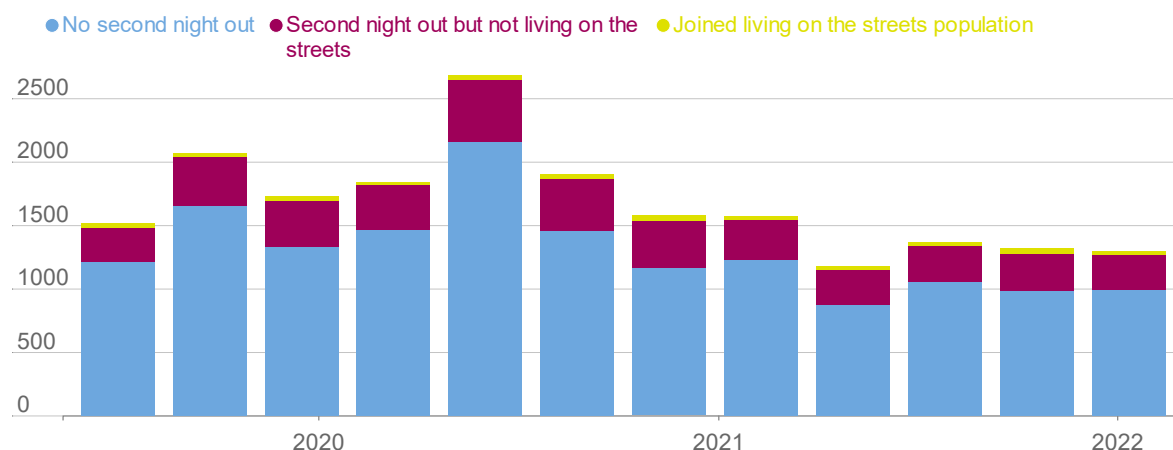
Source: GLA CHAIN quarterly rough sleeping reports

In the first quarter of 2022 outreach teams recorded 1,295 people sleeping rough in London for the first time, down from pre-lockdown figures. This figure peaked at 2,680 in Q2 2020, immediately after the first national lockdown was announced.

993 of the new rough sleepers in Q1 2022 only spent one night sleeping rough. 275 people in Q1 2022 were recorded sleeping rough for two nights but not considered to be living on the streets, again below the pre-pandemic trend.

By contrast, the number of rough sleepers who have joined the population living on the streets has stayed relatively steady throughout the pandemic, with 27 people in this category in Q1 2022.

9: INCOME, POVERTY & DESTITUTION

This chapter covers data about 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. It is made up from the sum of 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.

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%
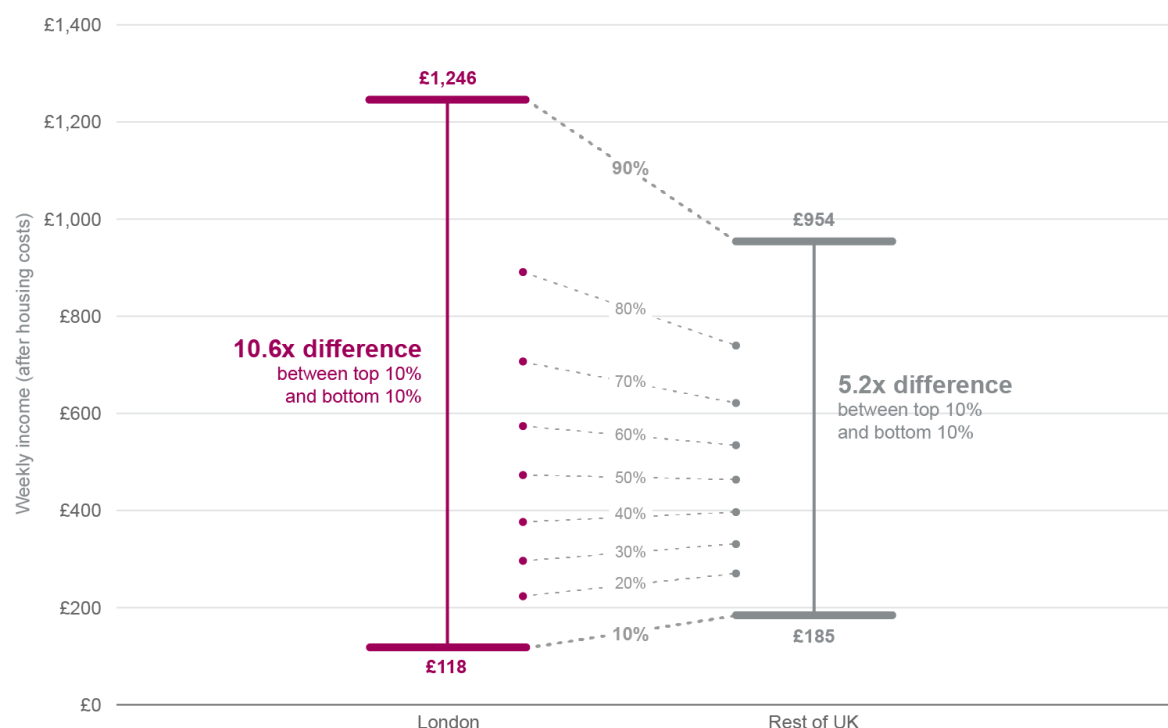
Source: DWP Households Below Average Income (HBAI)

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).

Figure 2: Median disposable income and income inequality, London
Weekly Disposable Household Income After Housing Costs, London
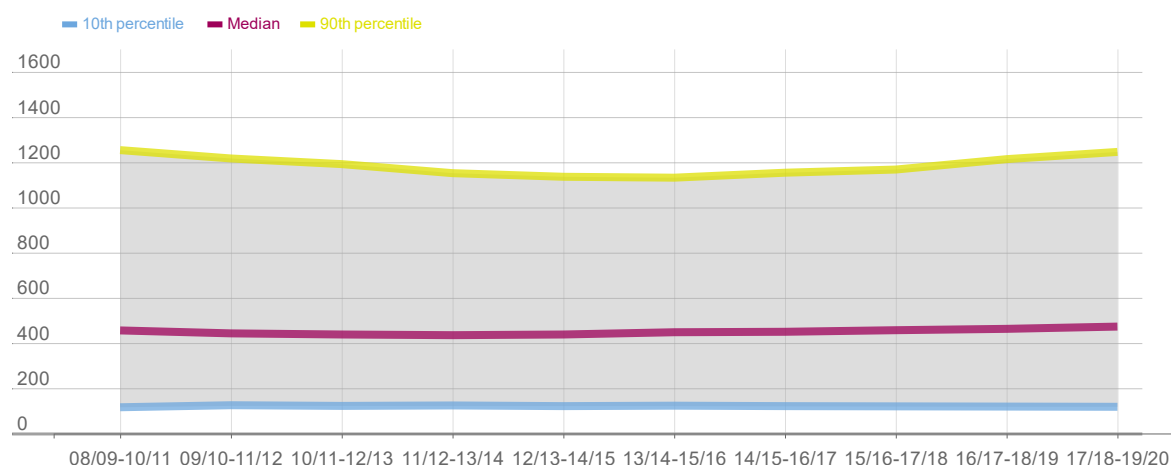
Source: [DWP, HBAI](#) 3-year average median equivalised income AHC indexed to 2019/20 prices

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.

Median income for a couple fell slightly to £435 (in 2019/20 prices) around 2013 but has risen steadily since, to £473.

The level of income after housing costs at the top decile fell by around £120 during and following the financial crisis in 2008 from £1,250 to £1,130 but has recovered to just below £1,250.

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.

Administrative data on means tested benefits, which are more timely, can be used to give a proxy. For some people, welfare benefits lift their income above what would be the relative poverty line using the full income-based measure, while other people with income below the poverty line may not be able to claim benefits.

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. Data on children in households claiming Universal Credit is included in the Young

people and education chapter. 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
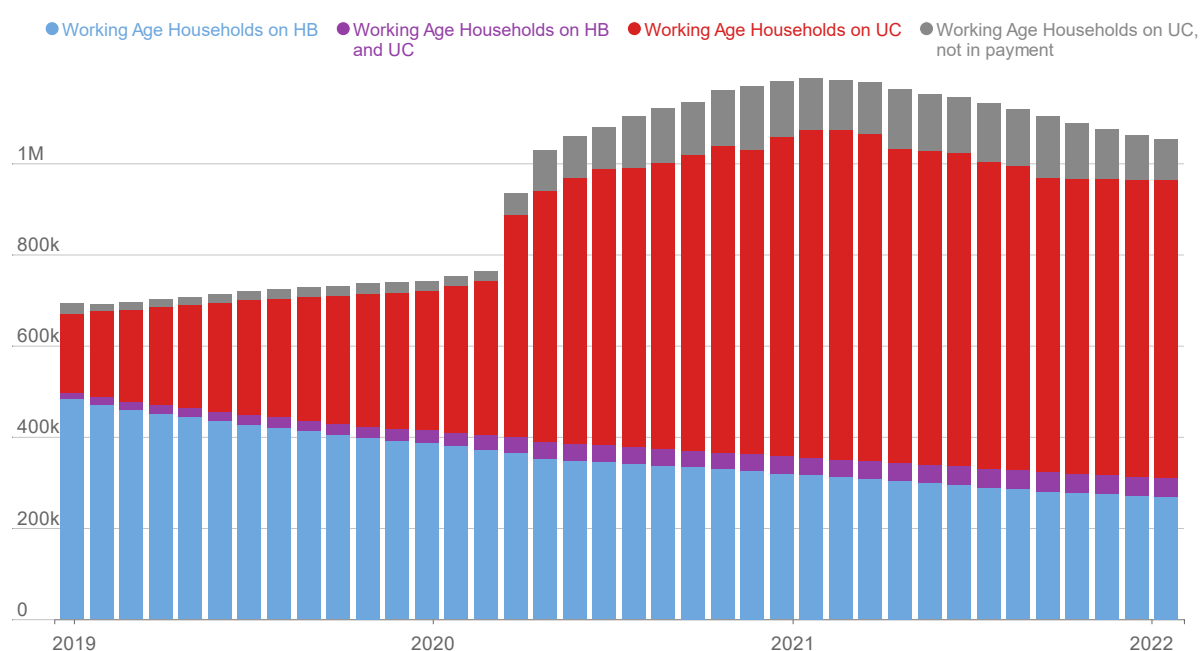
Source: DWP Benefits data via Stat-Xplore

There were more than 1.1 million working age adults living in households claiming one or both of the two main means-tested benefits, as of February 2022. The number claiming Housing Benefit is reducing over time, as people either stop claiming altogether or move onto Universal Credit.

The vast majority of working age households in London claiming means-tested benefits receive either Universal Credit or Housing Benefit, sometimes alongside other benefits.[28] More than half of claimants are single with no children.

More than 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

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[28] Relatively small numbers of working age adults are claiming only other means-tested benefits, such as Income Support, Jobseeker's Allowance (only means-tested for a small number of current claimants), Child and/or Working Tax Credit, Council Tax Support

households in March 2021, most notably falling when the £20 Universal Credit uplift ended in October.

Figure 4: Londoners claiming Universal Credit by work status

Summarised work conditionality status of people on Universal Credit
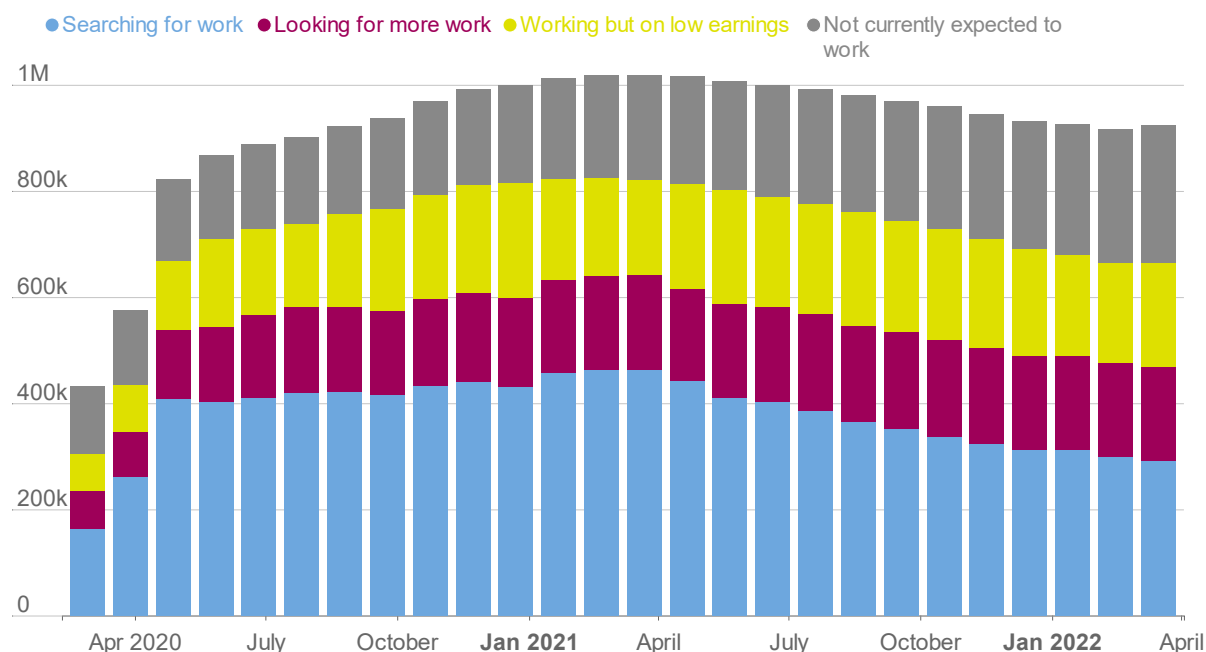
Source: DWP Benefits data via Stat-Xplore

Universal Credit is the welfare benefit with by far the largest number of working age claimants in London. The number of UC claimants that are either in low paid work on low earnings or unable to find sufficient work is almost 375,000, clearly exceeding the number that are out of work and searching for work[29], 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.

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[29] This is only part of the count of unemployed Londoners. See the Business, Jobs and Skills 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
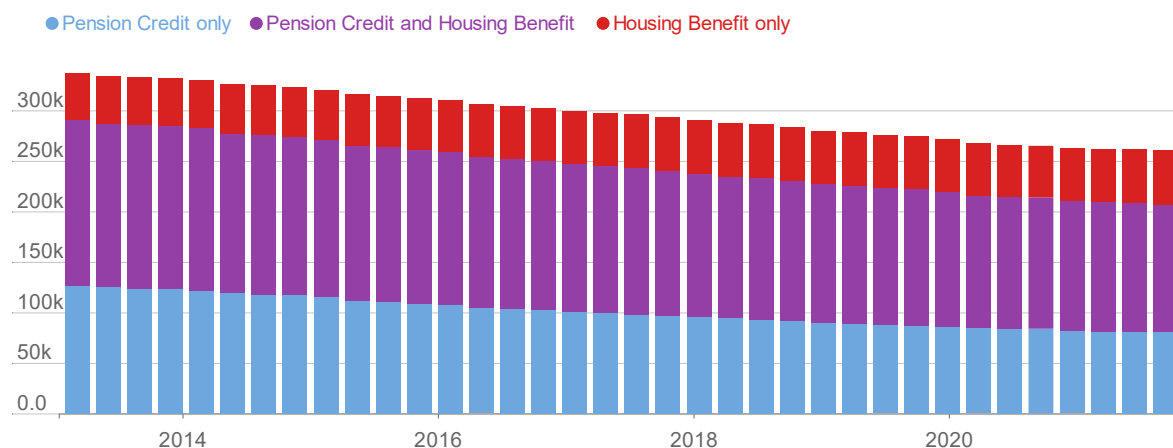
Source: DWP Benefits data via Stat-Xplore

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

The numbers claiming (including those claiming on behalf of a partner) 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[30] in 2013 to a quarter in 2021.

Most recipients of PC get an amount to top up their overall income to a guaranteed level. Just 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.

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

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[30] All people of state pensionable age on the DWP database receiving at least one benefit, which may include State Pension. Between 20,000 and 40,000

Figure 6: Relative poverty in London

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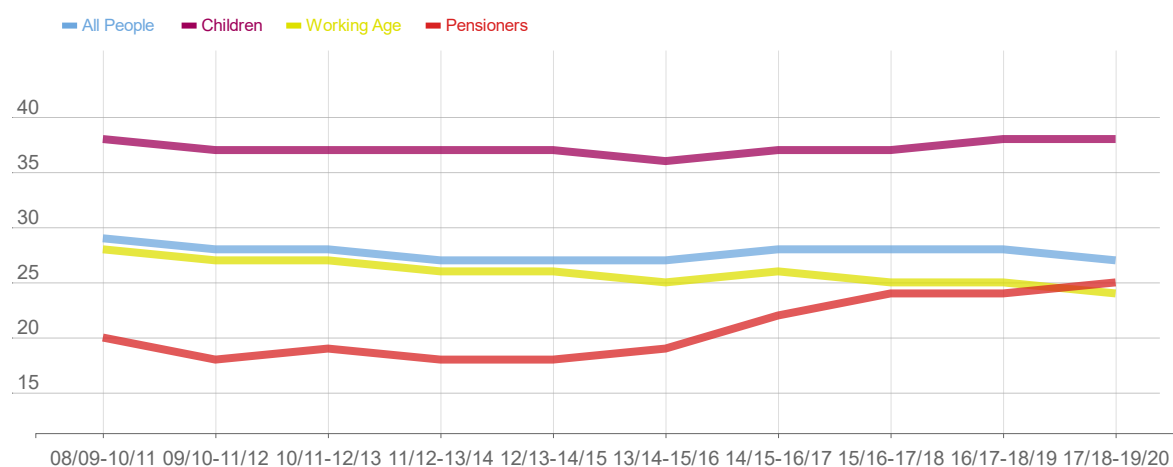
Source: DWP Households Below Average Income

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)
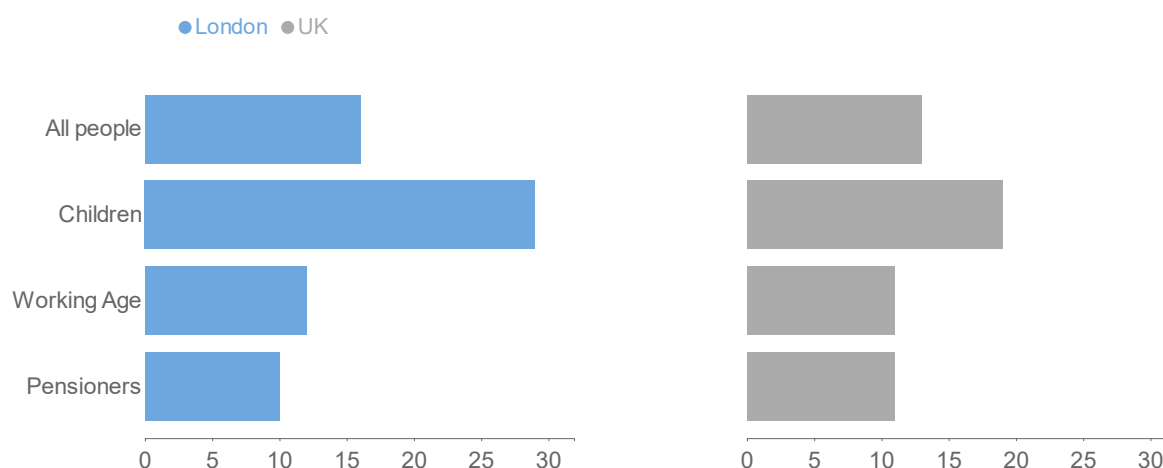
● London   ● UK

Source: DWP Income Dynamics

One in six Londoners were classed as in persistent poverty between 2016 and 2020. This proportion has changed little since 2010-2014.

In London, three in four of the children in poverty are in persistent poverty – 29% of all children (600,000). This has risen from less than 25% in 2010-2014.

The rate for children in persistent poverty in London is much higher than in the UK as a whole and this very high figure 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

● Jan 2022 ● Feb 2022 ● April 2022
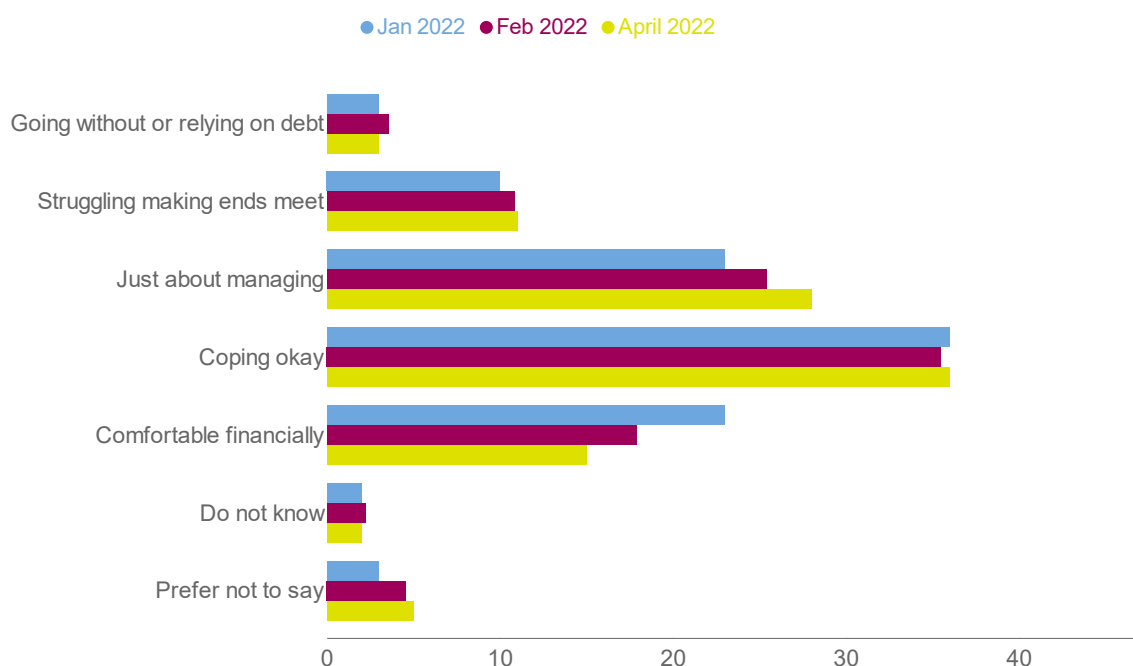
Source: YouGov survey Jan-Apr 2022

All figures, unless otherwise stated, are from YouGov Plc. Total sample size for April was 1123 adults. Fieldwork was undertaken between 14th – 19th April 2022. Sample size for February was 1276 and January 1188. The surveys were carried out online. The figures have been weighted and are representative of all London adults (aged 18+).

When asked how they were coping financially, in April 2022, half of Londoners said they were coping okay or comfortable financially with just over a quarter just about managing.

One in nine (11%) 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 decrease in those saying they are comfortable financially, balanced by an increase in those just about managing.

Higher income groups, homeowners or those living with family or friends were most likely to be comfortable financially or coping okay, whereas more of those out of work, people whose activities were limited a lot by a health condition or disability, Black or Asian people said that they were going without or struggling.

Around 40% had struggled to pay rent, pay bills and to keep up with credit payments over the previous six months. 80% of Londoners had seen their cost of living increase, most reporting rises in not only energy and food costs, but also in transport and leisure activity costs. The lowest area of reported rises was in housing.

In January, spending less on non-essentials was reported as a widespread response, but one in five were going into debt to help manage living costs.

Figure 9: Material deprivation among children

% of children who experience material deprivation and low income

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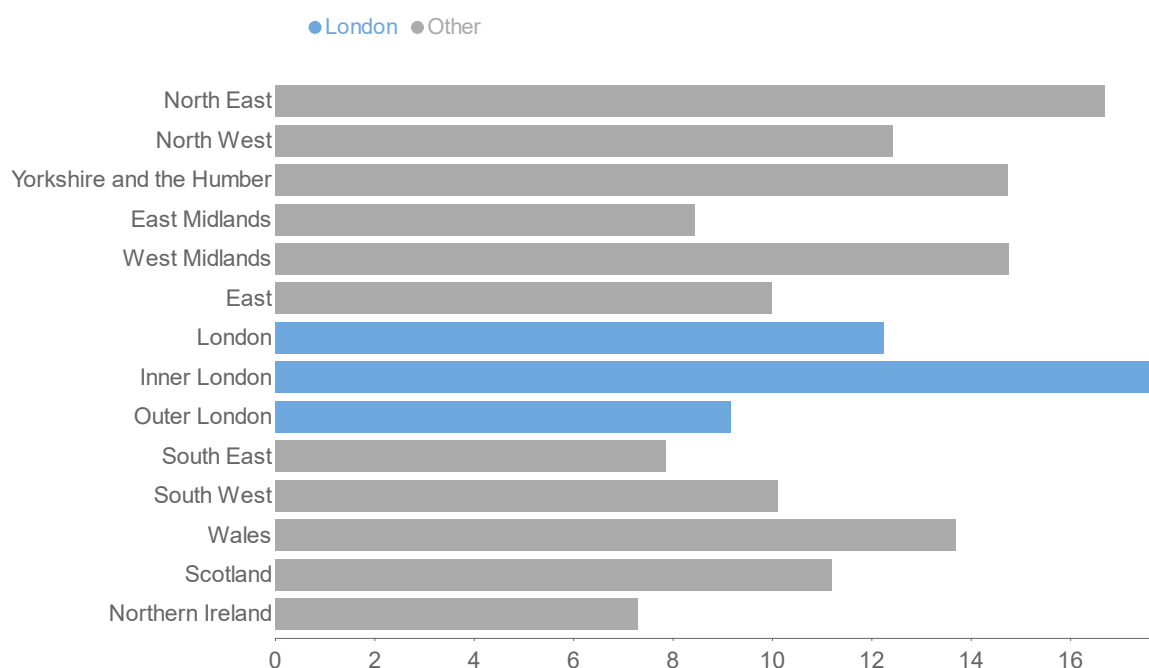
Source: DWP Households Below Average Income 2017/18-2019/20,

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%).

Around half of those children in London (around 100,000) live in families in severe low income, that is less than half the typical UK family's income before taking account of housing costs, and in material deprivation.

Figure 10: Material deprivation among older people

Percentage of pensioners in material deprivation by region (2017/18-2019/20)
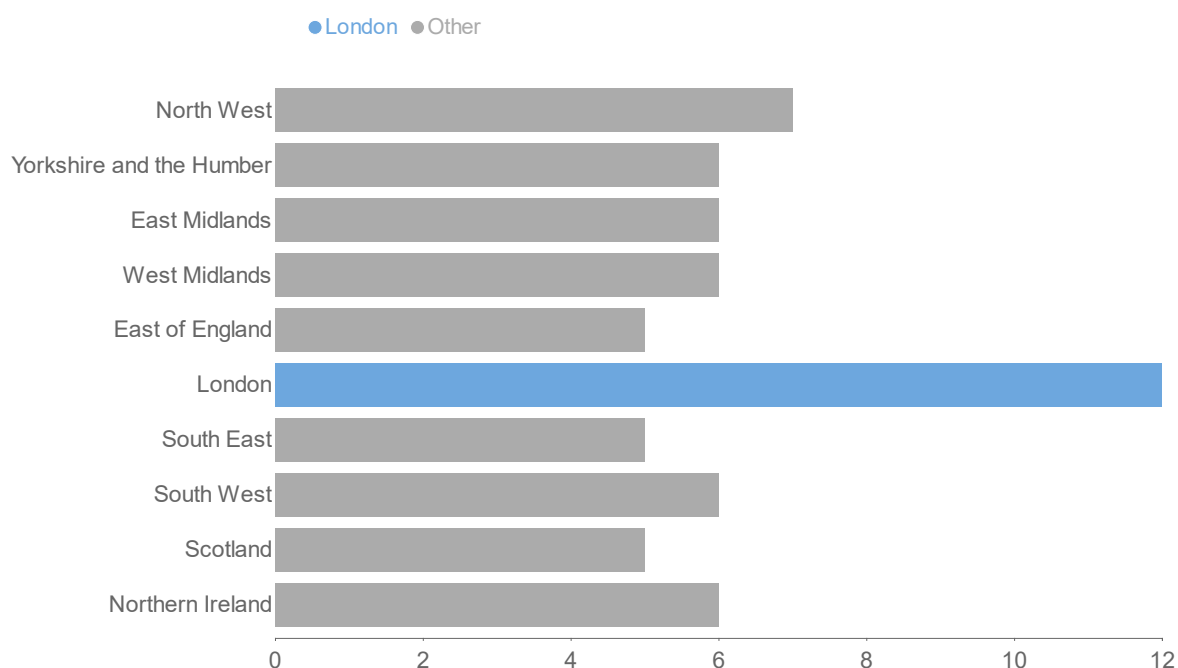
Source: DWP Households Below Average Income, DWP
Note: Data for the North East, Wales, Inner and Outer London is suppressed due to small sample sizes.

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
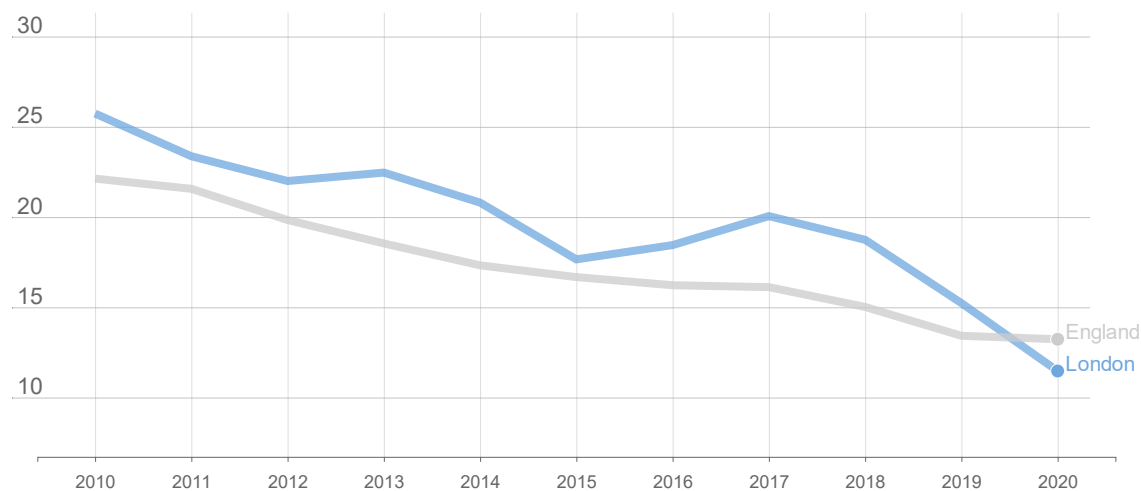
Source: BEIS Low Income, Low Energy Efficiency dataset

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
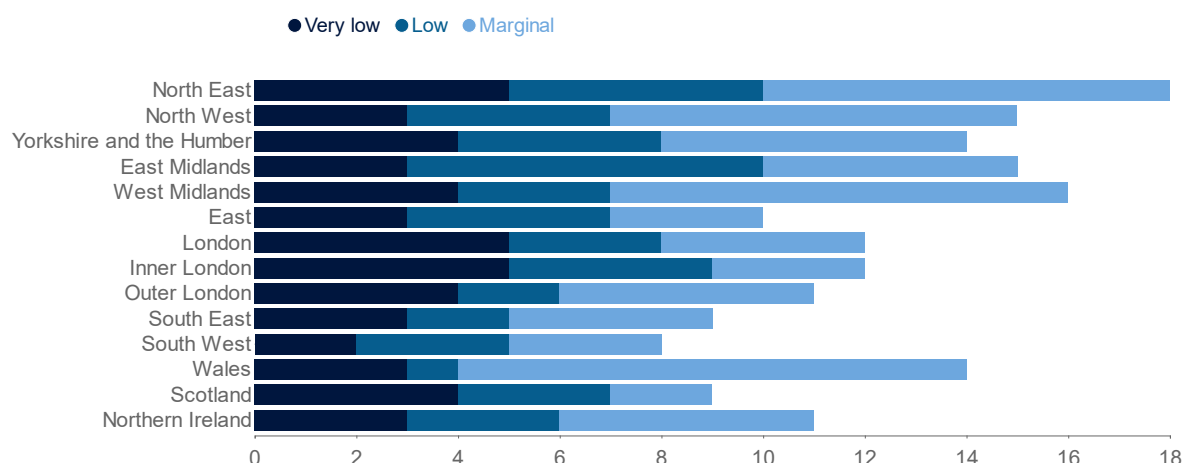
Source: DWP Family Resources Survey 2020/21

Eighty-eight per cent of households in London had high food security[31] 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[32]. London, particularly Inner London and the North East had the highest levels of households with very low food insecurity during 2020/21.

Trussell Trust figures show that more than 420,000 food parcels were handed out during that year in London, while almost 125,000 were handed out in the North East and nearly 135,000 in the East Midlands, along with just below 315,000 in the North West, amounting to over 2.5 million food parcels handed out by the Trussell Trust alone. Figures are not available for other food bank providers in London.

In 2018/19, the Survey of Londoners found that around one in five (21%) adults in London had low or very low food security at some time in the last year.

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[31] 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.

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

Figure 13: Personal insolvencies

Insolvencies per 10,000 population
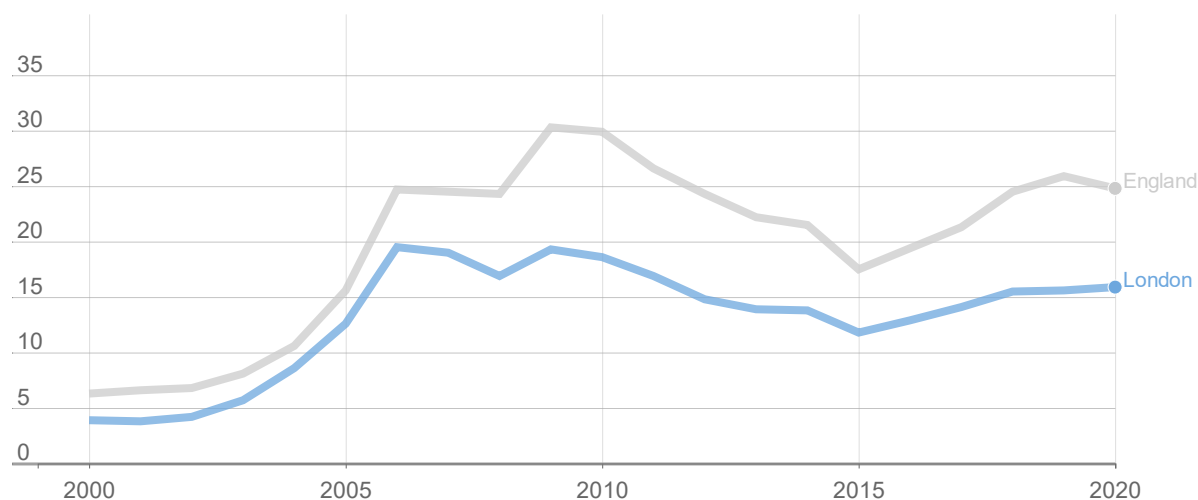
Source: Insolvency Service

Many people have debts. For most, these are manageable. For some people, they fall into arrears on bills and other payments, but this is a temporary situation. Around 5% of households were in arrears on households bills in 2016/17-2018/19.

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 11,053 individual insolvencies in London during 2020, around 16 in 10,000 adults. This rate is far lower than in other regions of England and Wales.

In all three categories of insolvencies, London had lower rates than other regions.

10: 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 will form part of a data-led tracker that TfL is developing 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
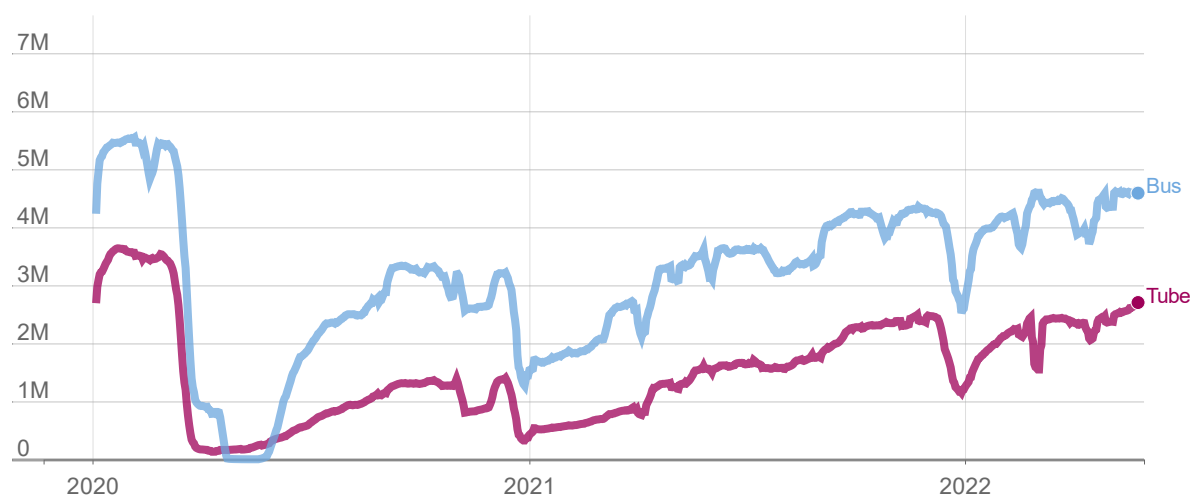
Source: TfL. Note: See the Resilience Dashboard for the latest data. For more detailed data, see the TfL Network Demand dashboard.

Passenger demand declined steeply at the outbreak of the pandemic, and at its lowest point, Tube demand was just 4% of normal. Bus journeys also fell to 16% of normal.[33] This drop in ridership was due to passengers following government guidance and staying home.

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[33] TfL (June 2022), 'Delivering the Mayor's Transport Strategy 2021/22'

After a steady increase in demand for Tube and buses in 2021, demand across both modes fell once more in December 2021 and January 2022 driven by the outbreak of the omicron variant.

Demand has since broadly recovered but remains below pre-pandemic levels. As of April 2022, demand had reached a high point of 83% on buses, and 71% on the Tube (as weekly averages), both the highest levels since early 2020.[34]

Figure 2: Active, efficient, and sustainable travel mode share
Proportion of trips by mode for active, efficient, and sustainable travel
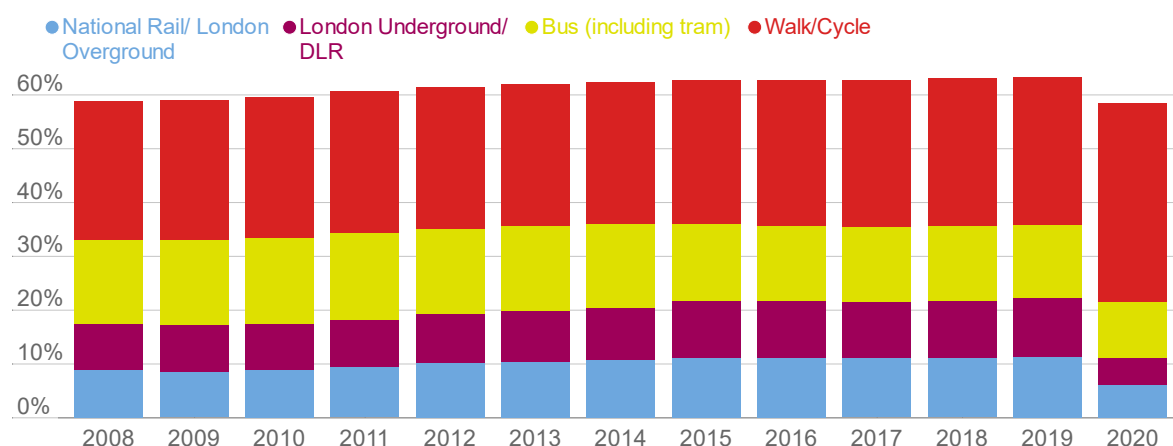
Source: TfL (2021) 'Travel in London Report 14'

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.

During the pandemic, the estimated share of trips made by active, efficient and sustainable modes fell to 58% in 2020. This was driven by a significant decline in public transport trips which fell from 36% of all trips in 2019 to 22% in 2020. However, bus use fell by less than other public transport modes, from 14% in 2019 to 11% in 2020.

This decline in public transport trips was offset somewhat by increases in active travel, with the share of trips by walking and cycling increasing significantly from 27% of all trips in 2019 to 37% of all trips in 2020.

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[34] TfL (June 2022), 'Delivering the Mayor's Transport Strategy 2021/22'

Active travel

Figure 3: Cycle flow
% Change in cycle flow on automatic cycle counters vs 2019
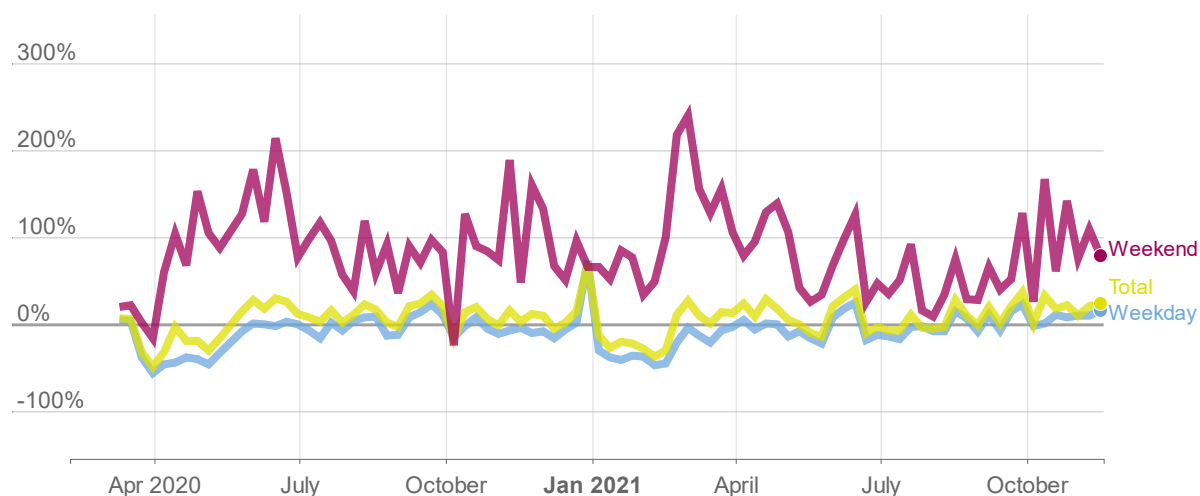
Source: TfL. See the Resilience Dashboard for the latest data.

The chart above shows percentage changes in cycle flow compared to the equivalent week in 2019 across weekends and weekdays.

Throughout 2020 and 2021, cycle flow on weekends remained mostly higher than the equivalent week in 2019, where at the highest points during the pandemic, cycle flow on weekends was over 200% higher than the equivalent week in 2019.

Percentage change in total and weekday cycle flow versus 2019 has been variable throughout 2020 and 2021. However, towards the end of 2021, both weekday and total cycle flow were above the equivalent week in 2019.

Figure 4: Active travel
Proportion of Londoners aged 20 and over who achieve at least 20 minutes of active travel per day
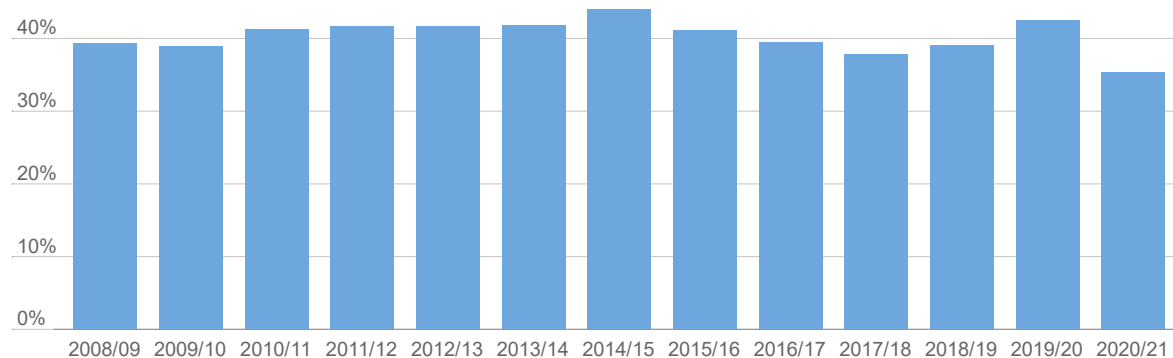
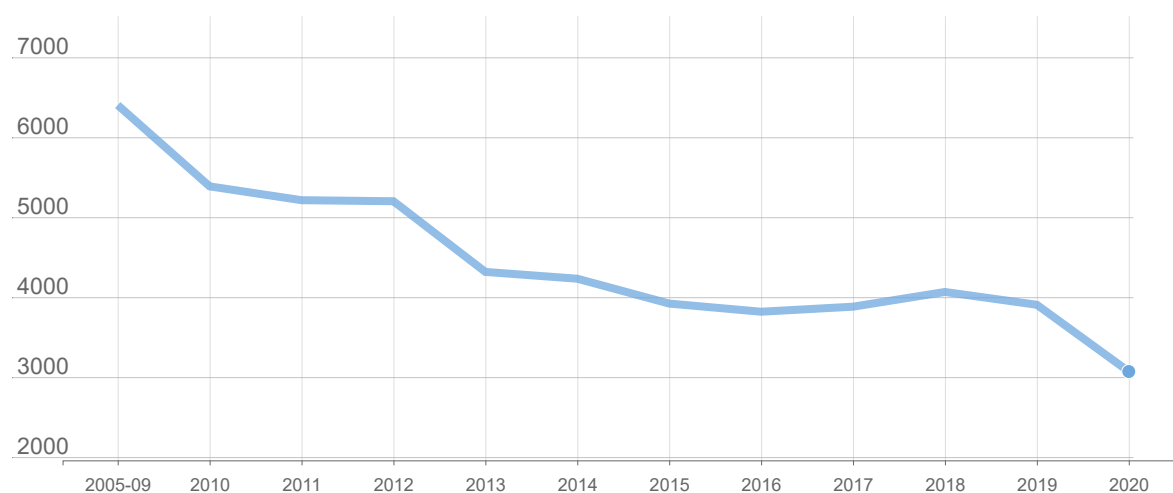*Source: TfL (2021) 'Travel in London Report 14'*

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 41% of Londoners on average achieving this benchmark between 2008/09-2019/20.

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.

Safety on transport

Figure 5: Road traffic collisions
Number of people killed or seriously injured (KSI) in road traffic collisions

Source: TfL (2021) 'Travel in London Report 14'. For more detailed data, see the Road safety data reports.

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

In 2020 there was an overall reduction of 21% in people killed or seriously injured on London's roads, compared to 2019. This represented a 52% reduction relative to the 2005-09 baseline.

Figure 6: Safety on the bus network

Number of people killed or seriously (KSI) injured by a bus[35]

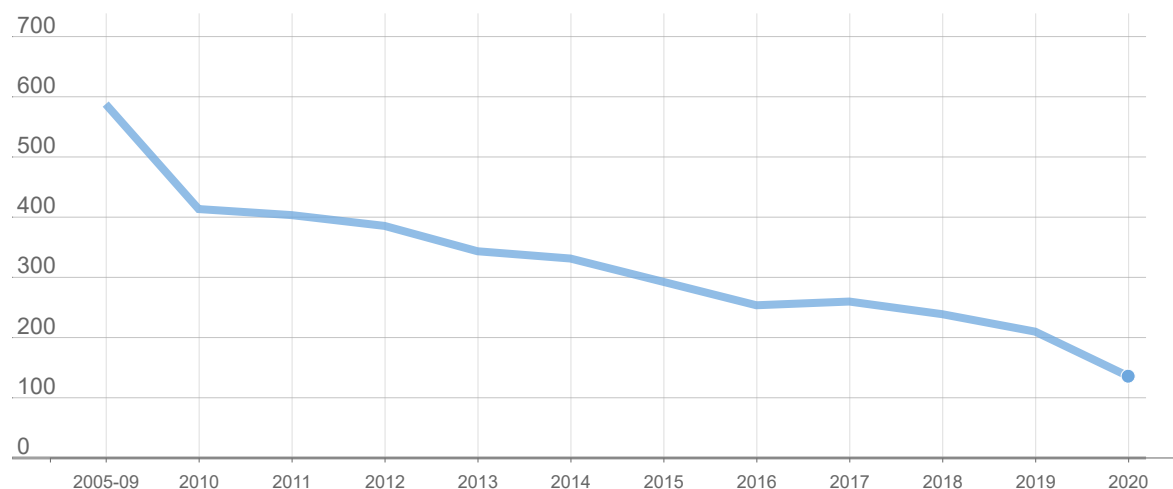*Source: TfL (2021) 'Travel in London Report 14'. For more detailed data, see the Road safety data reports.*

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).

There was a 35% decrease in people killed or seriously injured in collisions involving a bus in 2020 compared to 2019, down from 209 to 135 people. This represented a 77% reduction against the baseline, exceeding the overall target of a 70% reduction by 2022.

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[35] This indicator was taken from the General Framework in TfL (2021) 'Travel in London Report 14'. This indicator has since changed to 'Number of customers killed or seriously injured on TfL services' as set out in TfL (June 2022) 'Delivering the Mayor's Transport Strategy 2021/22', the annual update on the MTS.

Transport accessibility

Figure 7: Physical accessibility of the network
Relative additional journey time using the step-free network (mins)
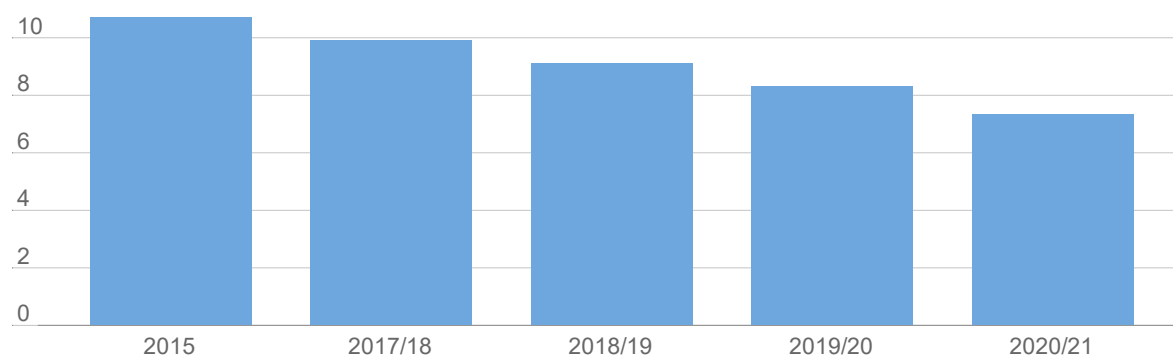
Source: TfL (2021) 'Travel in London Report 14'

Over half of the TfL rail network – spanning London Underground, DLR, London Overground, London Trams and TfL Rail services – is now step-free.

The average additional journey time required to make a journey using only the step-free network, as opposed to the whole network, has decreased since 2015 (TfL's baseline). The additional journey time was 7.3 minutes in 2020/21, a reduction of 12% on the previous year and continuing the trend in recent years towards the Mayor's aim of halving the differential by 2041.

Transport quality

Figure 8: Bus service performance
Scheduled kilometres operated and scheduled kilometres lost
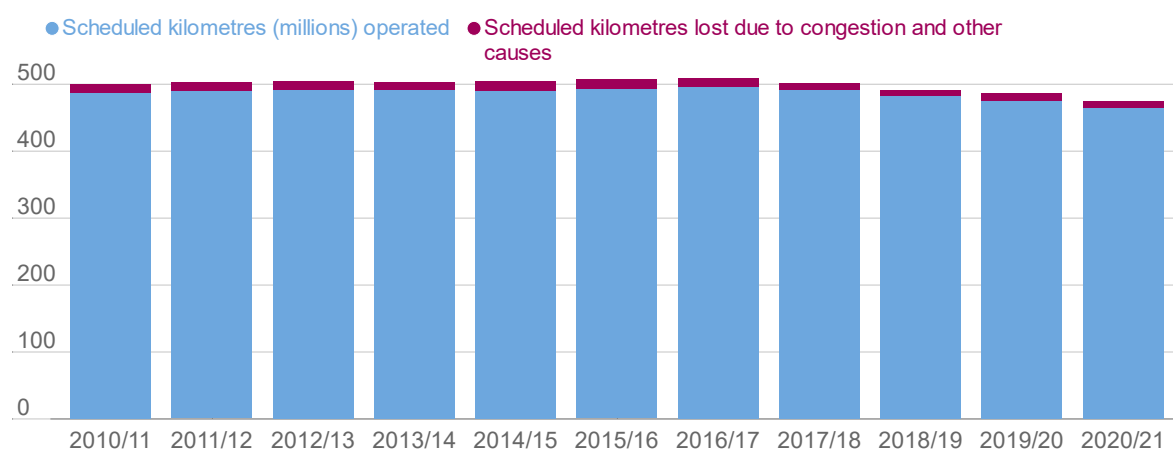
Source: TfL (2021) 'Travel in London Report 14'

Bus network performance is monitored by TfL by measuring scheduled kilometres versus kilometres operated. 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.

Scheduled services fell by 3% between 2019/20 and 2020/21. This compares to an almost 60% drop in demand in the same period, which illustrates the efforts to keep operating a high level of service to enable social distancing and essential journeys throughout the pandemic.

In the years before the pandemic, average bus speeds had been relatively stable at around 9.3mph. During the pandemic (2020/21), bus speeds increased to over 10mph, in the context of slightly reduced levels of general road traffic.

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
2010/11	72.1	68.9	95.6%	44.6	6.5	14.6%
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	85.0	82.4	97.1%	41.7	4.6	11.0%
2016/17	86.3	83.7	96.9%	41.7	4.7	11.0%
2017/18	87.2	84.3	96.7%	41.6	4.6	11.2%
2018/19	88.7	85.0	95.8%	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	71.8[3]	72.6	90.8%[3]	n/a	n/a[4]	n/a[4]

Source: London Underground.
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: These figures are based on only 11 financial (4-week) periods from and including period 3 of the 2020/21 financial year.
4: While demand remains subdued, it is not possible to compute excess journey time.

Source: TfL (2021), 'Travel in London Report 14'

London Underground service provision in terms of scheduled kilometres grew steadily throughout the 2010s rising from 72.1 million kilometres in 2010/11 to 87.7 million in 2019/20 before falling following the outbreak of the pandemic.

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). On an annual basis, operated kilometres fell by 12% between 2019/20 and 2020/21 while demand fell by some 78% in the same period.

Transport efficiency

Figure 10: Road traffic statistics

All motor vehicle traffic flows by area, 13-period rolling average, 2008/09-2021/22. Index: 2006/07=100
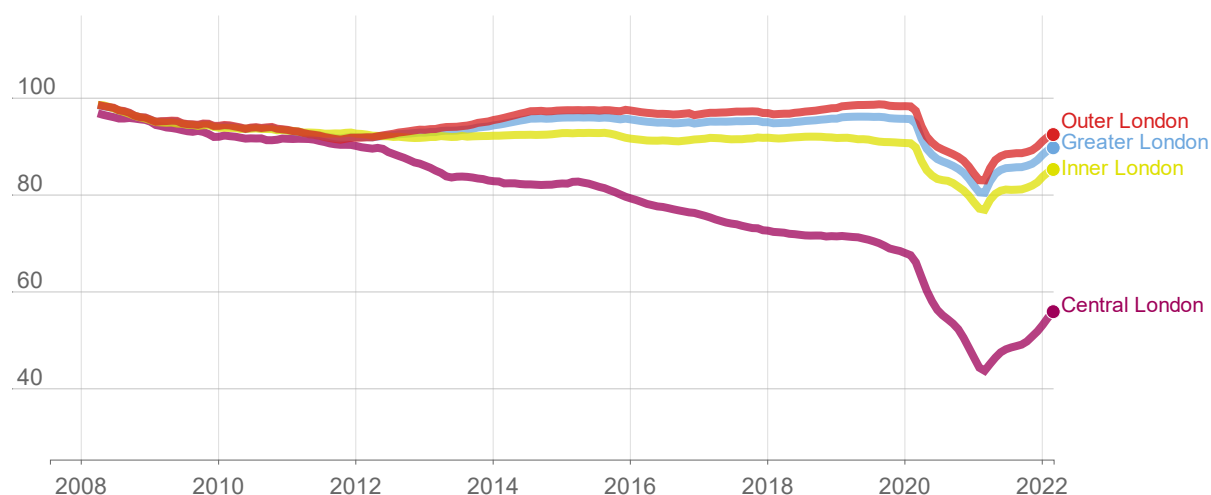
*Source: TfL. Note: Data shown above is weekly.*

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 started to increase gradually, although the latest data for March 2022 remains on average, approximately 10% below the same period in 2019.

Digital Infrastructure

Figure 11: Full Fibre availability
% of premises able to access full fibre
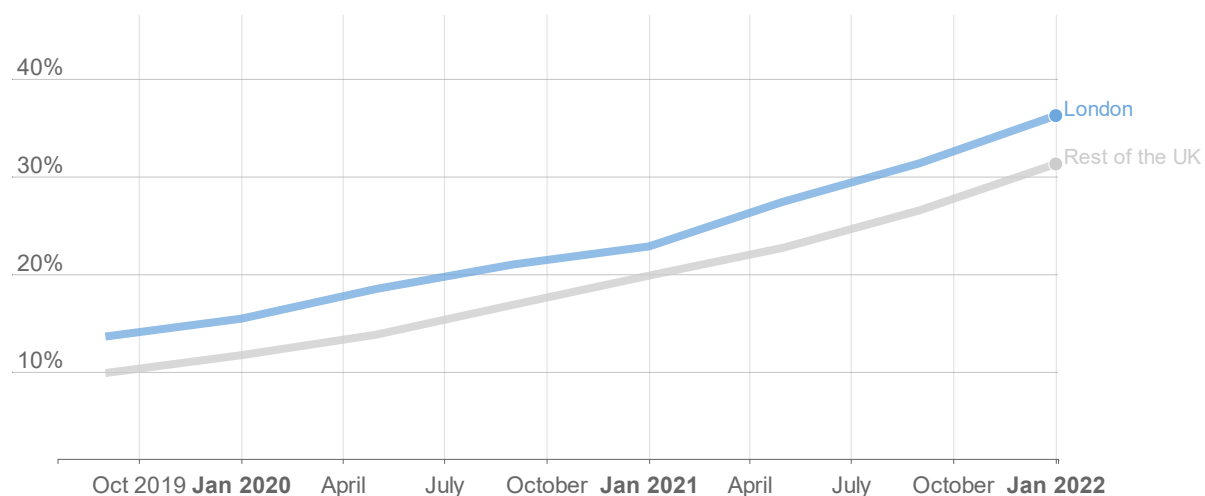
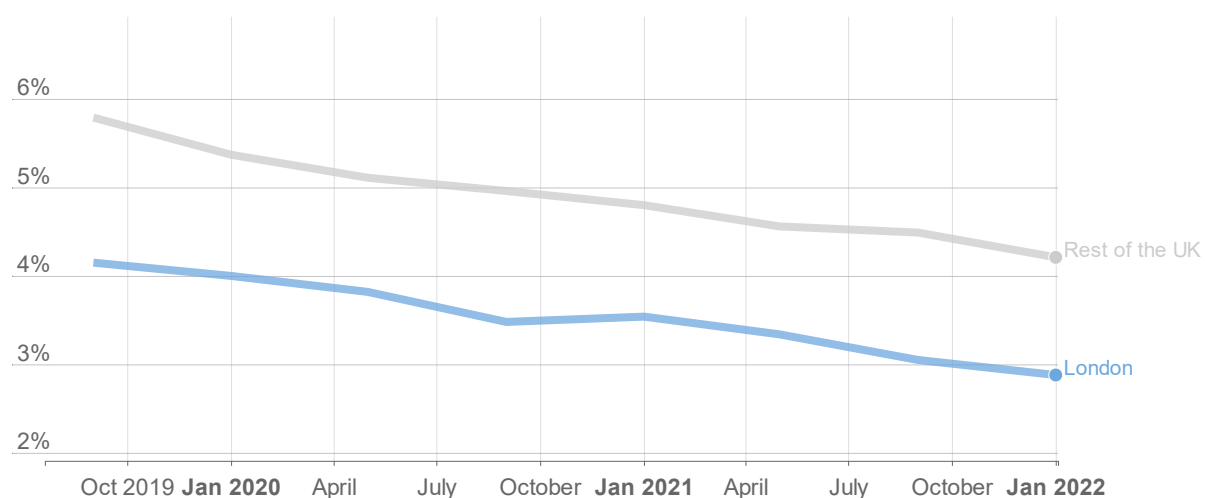*Source: Ofcom*

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 36% (or 1.4m) of premises (business and residential) in London as of January 2022, compared to 31% in the rest of the UK. Between September 2021 and January 2022, 190,000 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 January 2022, just under 3% of London premises were unable to access internet speeds of 30Mbit/s or more, compared to just over 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, June-October 2021.
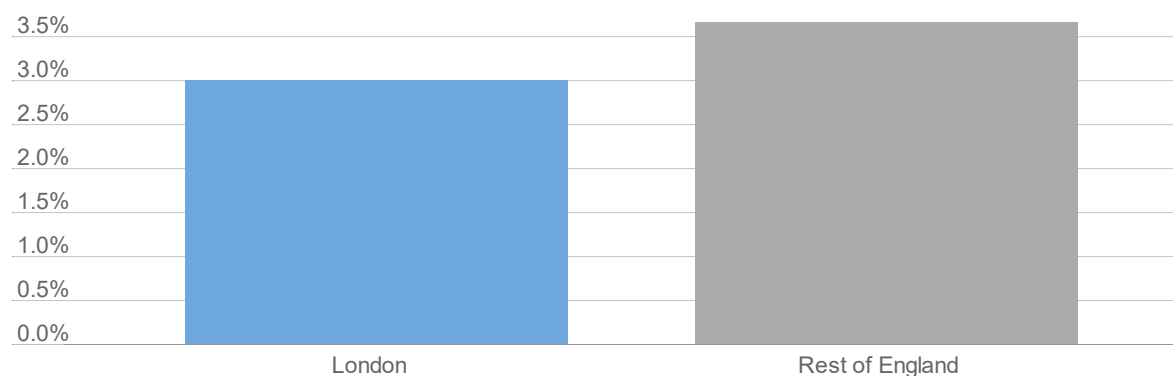
Source: [Ofcom](#)

The chart above shows the proportion of households that have experienced affordability issues with their broadband over the period of June–October 2021. 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.

Three per cent of adults[36] in London reported affordability issues with fixed broadband in the last month, as of June-October 2021. This figure is slightly lower than the figure for the rest of England, where 3.6% of adults reported affordability issues.

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[36] Based on Ofcom sample: All adult aged 18+ who make decisions about communication services or non–decision-makers who personally use a mobile phone who own that device/cancelled it previously (fixed broadband).

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 phone in the last month, June-October 2021
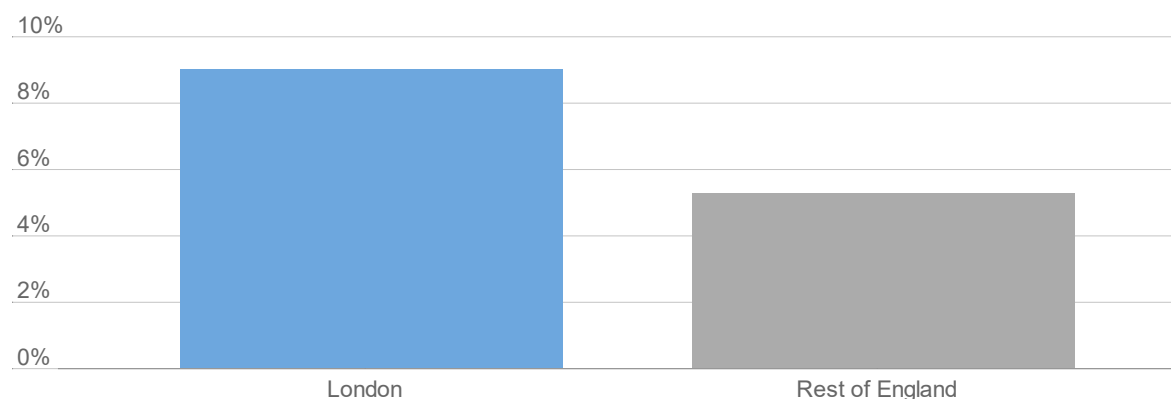
Source: Ofcom

The chart above shows the proportion of households that have experienced affordability issues with their mobile phone over the period of June-October 2021. 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 in London were higher than the rest of England; 9% of adults[37] in London reported affordability issues compared to 5.3% in the rest of England.

In London, the most common affordability issue was making changes to a payment method or tariff and making changes to make mobile phone data more affordable.

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[37] Based on Ofcom sample: All adult aged 18+ who make decisions about communication services or non-decision-makers who personally use a mobile phone who own that device/cancelled it previously (mobile).

11: 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 has four parts covering: Early years education; Primary education; Secondary education; 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. The Recovery Missions relevant to this chapter include a New Deal for Young People, Healthy Place and Weight and Mental Health and Wellbeing.

Health and Happiness

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

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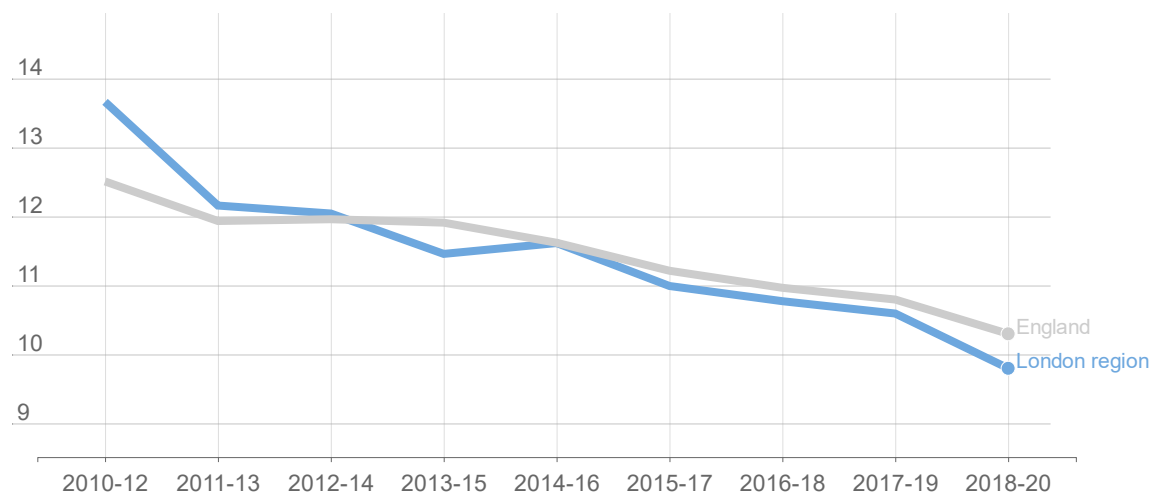
Source: Office for National Statistics (ONS)

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)
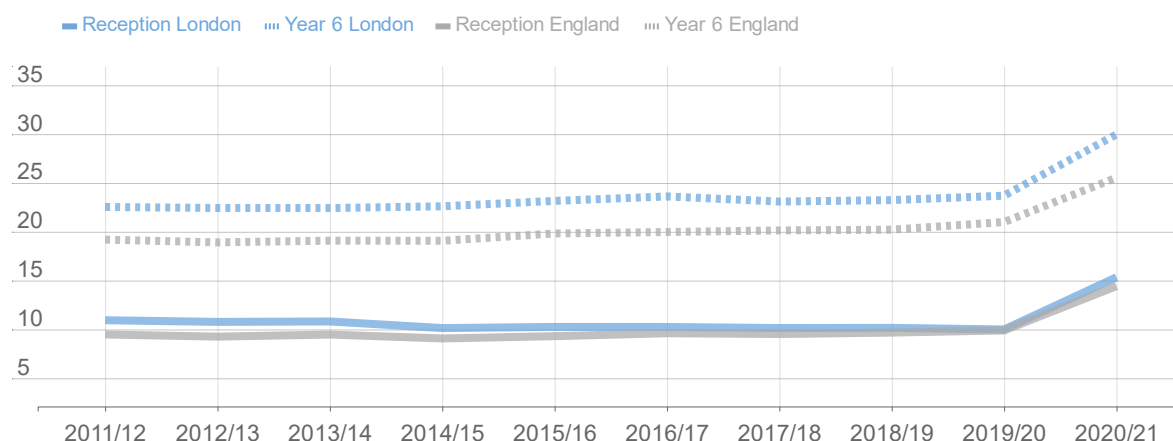

Source: NHS Digital, National Child Measurement Programme

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 in London for life as a whole between 2011-12 and 2019-20
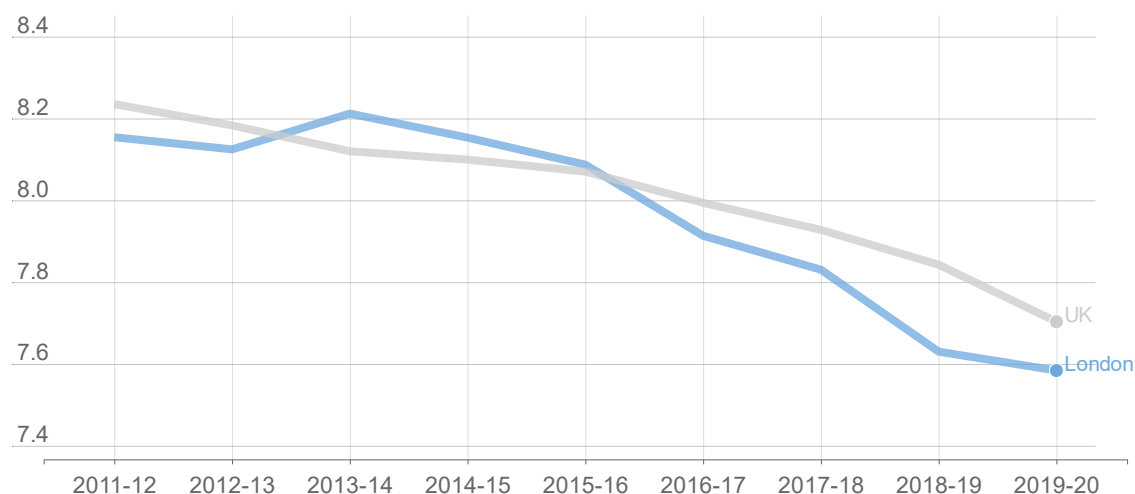
Source: Understanding Society Survey

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

Map showing the percentage of all children aged 0-17 living in low income families across London wards
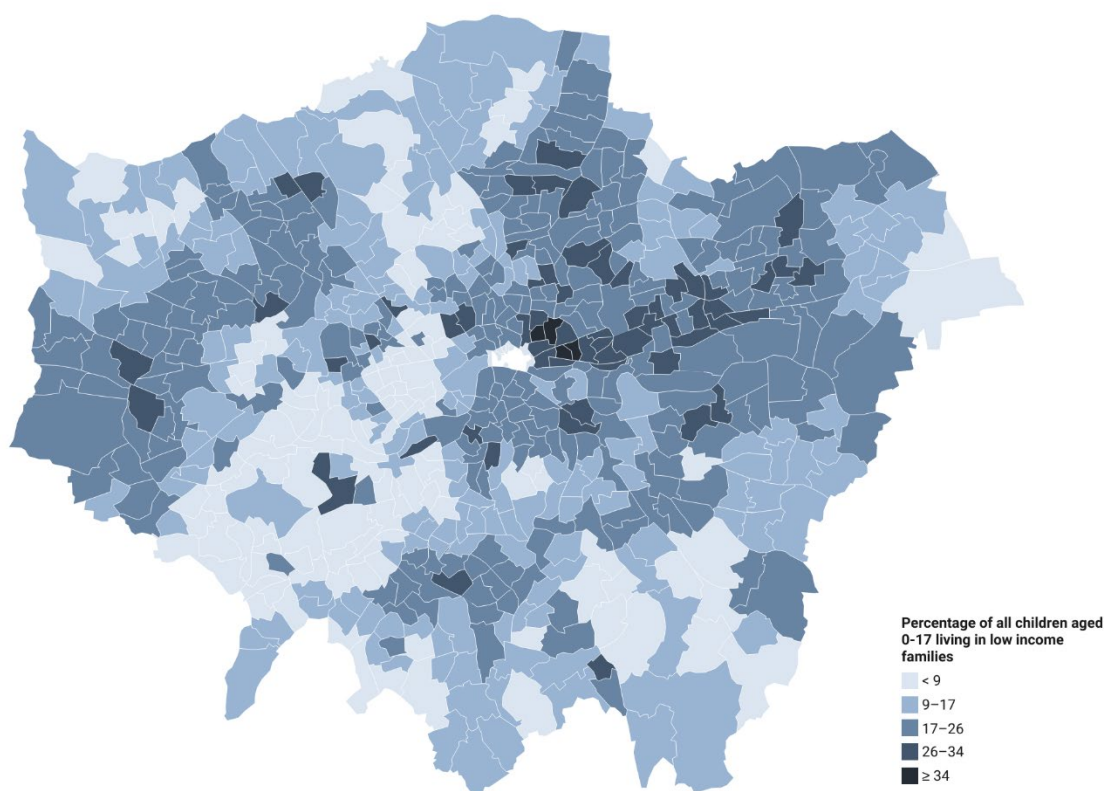
Source: Children in low income families dataset, DWP, rates calculated as a percentage of GLA ward estimates of 0-17 age group

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.

The London borough with the smallest reduction in the number of children living in low income families between 2019/20 and 2020/21 was Harrow, falling less than 1%, while Haringey experienced the largest decrease at over 14%. Over the longer term, Harrow had the largest increase between 2014/15 and 2020/21 in the number of children in low income families, at 57%, with Wandsworth and Hillingdon the only other boroughs with increases of more than 40%. This picture is likely to have changed with the removal of the benefit uplift.

Early Years

Figure 5: Registered early years providers[38]

Number of registered early years providers across London in March and December between 2015 and 2021[39]
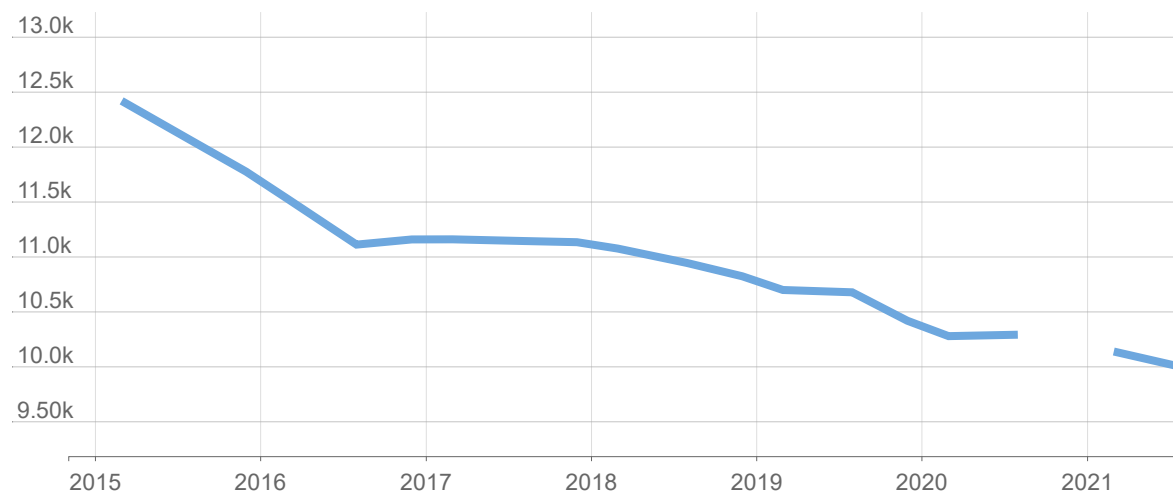
Source: [Department for Education](#).

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 2020, there was a 7% decrease in the number of registered early years providers across London from 10,695 to 9,991, compared to a decrease of 10% across England from 61,652 to 55,723.

Since March 2015, there has been a 20% decrease in the number of registered providers across London, compared to a decrease of 24% across England.

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[38] 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.
[39] 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 2020[40]

● 2018 ● 2019 ● 2020
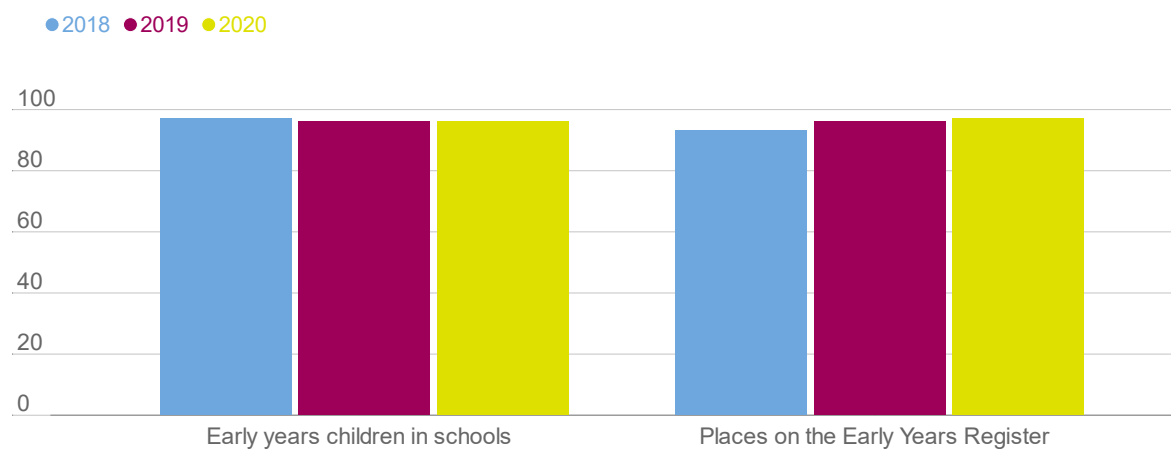
Source: GLA London Education Report 2020

Ninety-six per cent of early years children in schools attend a setting which is 'good' or 'outstanding'[41].

Ninety-seven per cent of places registered on the Early Years Register are in 'good' or 'outstanding' settings, which is an increase of 4 percentage points from 2018.

In comparison to the rest of England, London's places registered on the Early Years Register are as likely to be in a 'good' or 'outstanding' setting (97% respectively).

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[40] Provider level data from DfE 'Schools, pupils and their characteristics: January 2019'; June 2019, with Ofsted, 'State-funded schools inspections and outcomes as at 31 December 2019, March 2020'
[41] Inspectors use a four-point scale to make judgements, grade 1: outstanding, grade 2: good, grade 3: requires improvement and grade 4: 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[42]
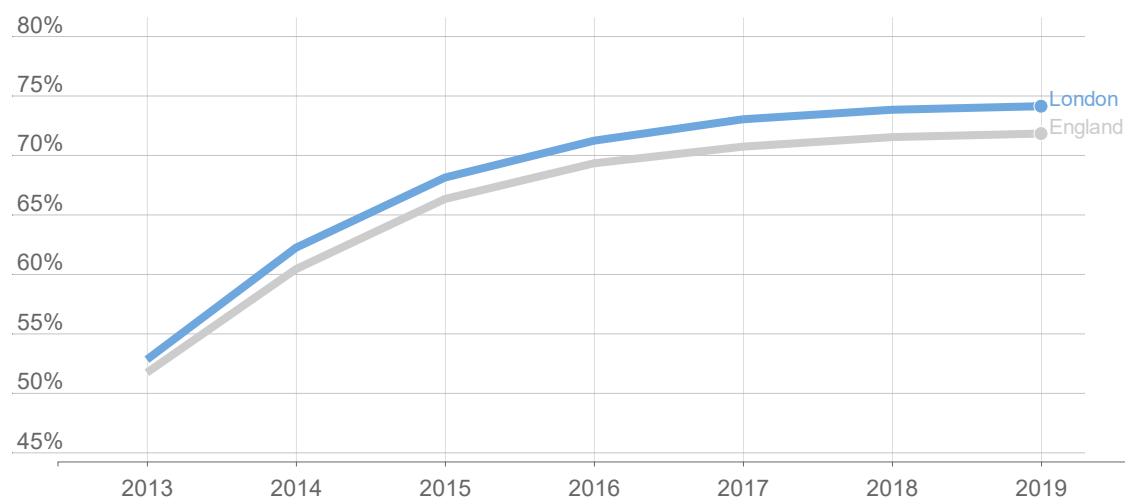
Source: Department for Education

Whilst the percentage of children in London with a good level of development[43] 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 with a good level of development at age five between 2013 and 2019

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

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[42] 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. There was no requirement to submit data to the local authority or to confirm whether it has been completed for DfE.

[43] 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.

Black children are less likely to have a good level of development at age 5 compared to any other ethnic group, being 72% compared to 84% for the highest achieving ethnic group (Chinese). This attainment gap, between Chinese children and black children has increased by 11 percentage points since 2013 (see Table above)[44].

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
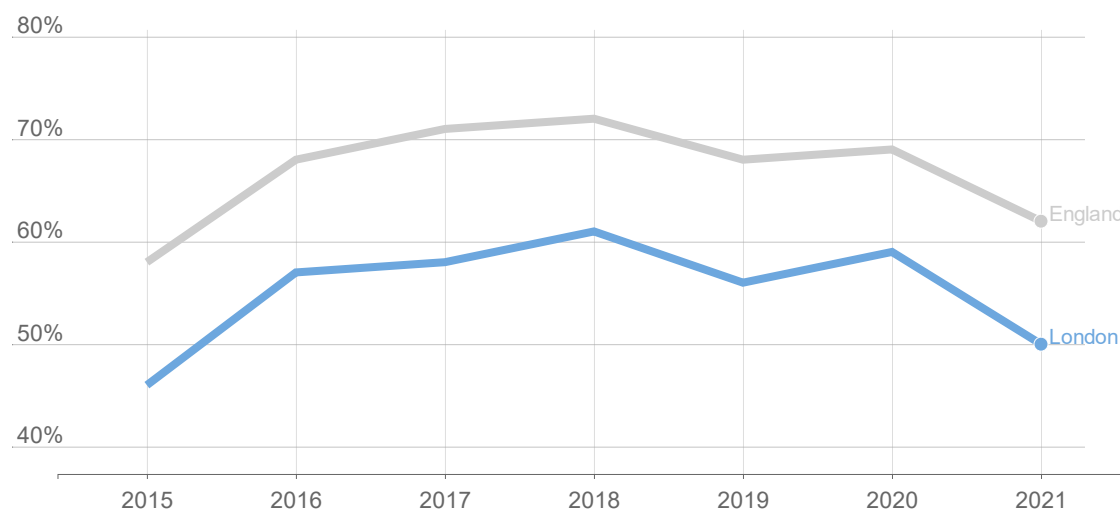
Source: [Department for Education](#)

Only 50% of eligible two-year-olds in London used at least part of their Free Early Education Entitlement (FEEE)[45], 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.

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[44] 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.

[45] A two year old is entitled to free childcare if their parent/guardian is in receipt of a range of [benefits](#) and/or if they are looked after by the local authority, have a statement of special education needs or an education, health and care plan, get disability living allowance or have left care under an adoption order, special guardianship order or a child arrangements order.

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
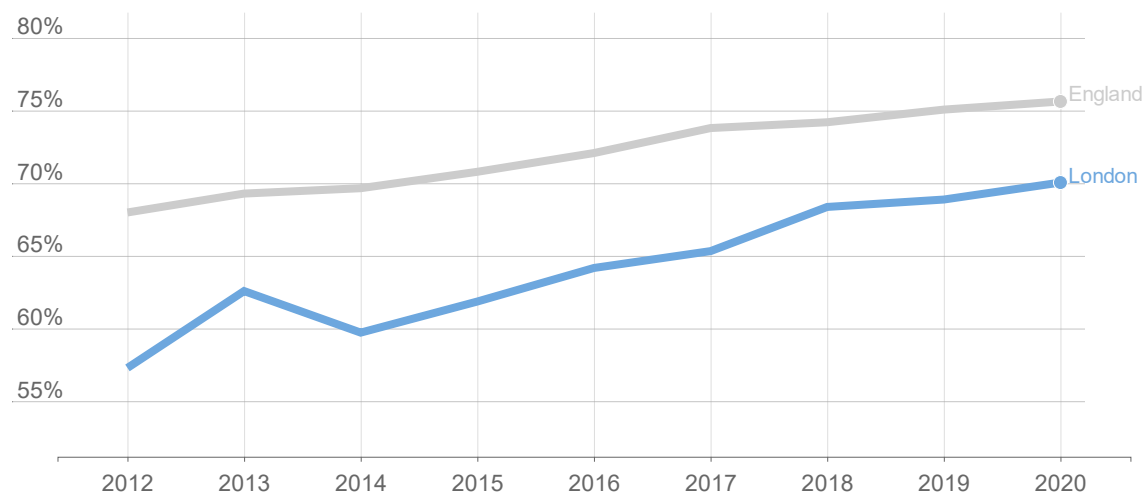
Source: Office for National Statistics

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.

A higher percentage of white mothers with dependent children are in paid work compared to mothers from any other ethnic group. This employment gap, however, has decreased over the past year, partly due to a decrease in the percentage of white mothers in paid work.

Asian mothers with dependent children continue to experience the greatest gap, with 64% in paid work compared to 73% of white mothers.

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 2020-21
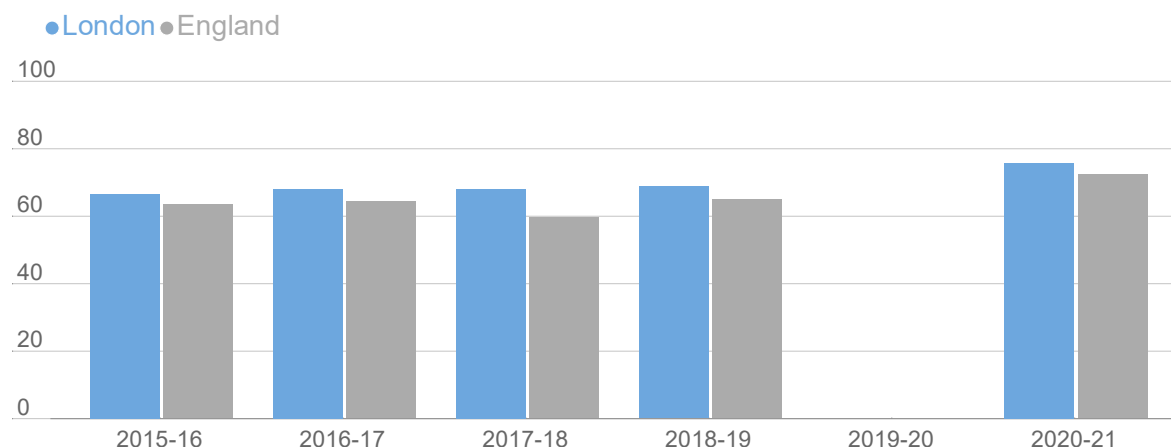
Source: Department for Education

London has a higher percentage of pupils achieving a standard 9-4 pass[46] in English and Mathematics compared to England, being 76% compared to 72%.

Since 2015-16, the percentage of pupils achieving a standard pass in English and Maths increased across London by 9.2 percentage points (from 66% to 76%), compared to 8.9 percentage points across England (from 63% to 72%).

A lower percentage of black (72%) and mixed pupils (73%) achieve a standard pass in English and Maths compared to any other ethnic group (94% for Chinese pupils, the highest achieving ethnic group).

Sixty-four per cent of disadvantaged pupils achieved a standard pass in English and Maths in 2020-21, compared to 81% of non-disadvantaged pupils.

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

Figure 11: Average attainment 8 score

The average attainment 8 score per pupil in London and England between 2015-16 and 2020-21
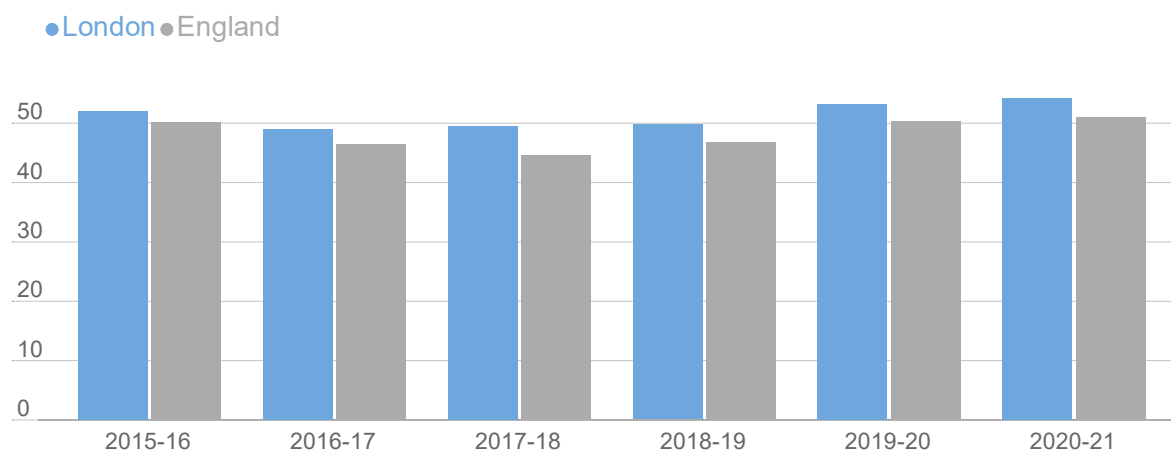
Source: [Department for Education](#)

The average attainment 8 score[47] in London was 54.1 in 2020-21, which was 3.2 percentage points higher than the England average of 50.9.

Since 2015-16, London's average attainment 8 score has increased by 2.2 points, from 51.9 to 54.1. This is slightly higher than the national increase of 0.8 points, from 50.1 to 50.9.

Black pupils have the lowest average attainment 8 score than any other ethnic group, being 50.5 compared to 70.8 for the highest achieving ethnic group (Chinese).

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 points in 2020-21.

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.

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

Figure 12: Fixed-term exclusion rate

The fixed term exclusion rate[48] for pupils with at least one fixed term exclusion in the academic year in London and England between 2011-12 and 2019-20
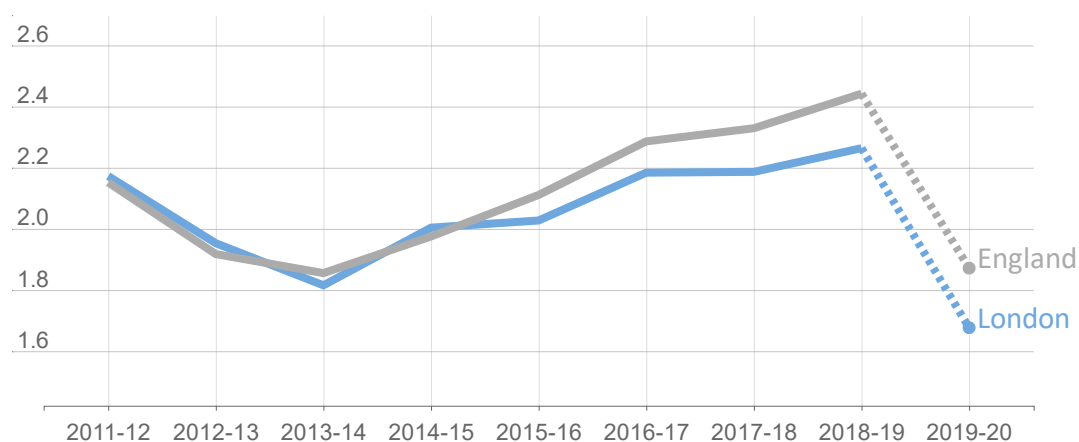
Source: [Department for Education](#)

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[49].

Special schools, however, 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.

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[48] The number of fixed-term exclusions is expressed as a rate per 10,000 pupils (headcount).
[49] Data analysis for school exclusions uses the last year of uninterrupted learning – 2018-19.

Figure 13: Permanent exclusion rate across all schools

The permanent exclusion rate[50] across all schools in London and England between 2011-12 and 2019-20
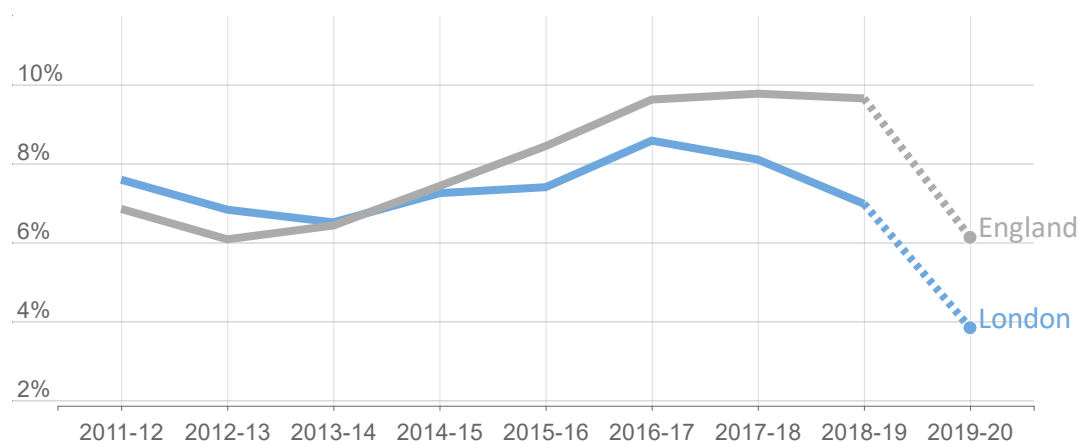
Source: [Department for Education](#)

Since 2016-17, the permanent exclusion rate in London has decreased from 0.09 to 0.07 in 2018-19. During the same time period, the national exclusion rate has remained constant at 0.10.[51]

Between 2011-12 and 2018-19, the permanent exclusion rate across special schools decreased from 0.19 to 0.03.

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.

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[50] The number of permanent exclusions is expressed as a rate per 10,000 pupils (headcount).
[51] Data analysis for school exclusions uses the last year of uninterrupted learning – 2018-19.

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 and England between 2016-17 and 2020-21
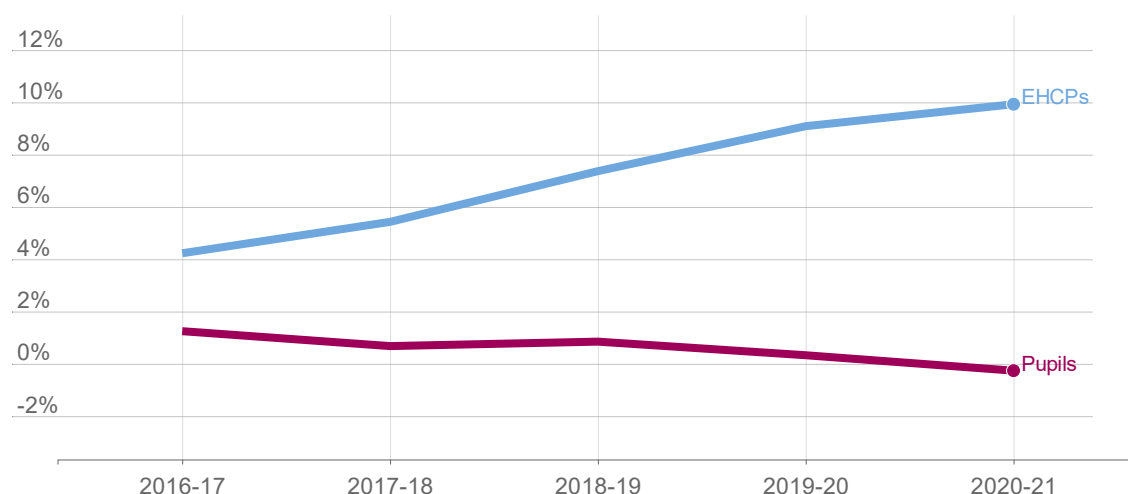
Source: Department for Education

The number of pupils in London with an Education, Health and Care (EHC) plan or statement of SEN[52] increased by 9.9% between 2019-20 and 2020-21, compared to the pupil population, which decreased by 0.3%.

Between 2019-20 and 2020-21, the number of primary school pupils with an EHC plan or statement of SEN increased by 12%, compared to a decrease of 2% across the pupil population.

The number of pupils with an EHC plan or statement of SEN across secondary schools increased by 13% between 2019-20 and 2020-21, compared to the pupil population which increased by 3%.

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[52] 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
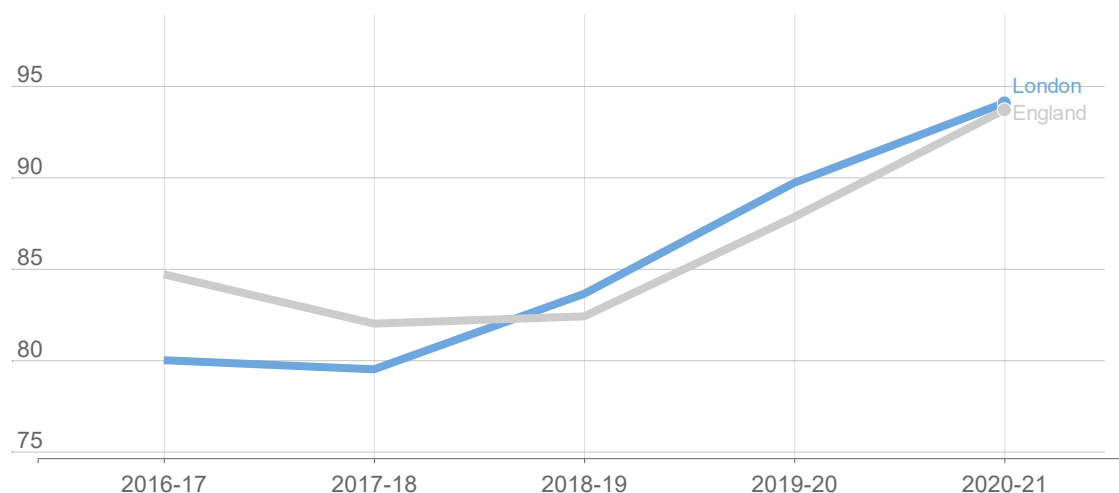
Source: Department for Education

Ninety-four per cent of pupils across London achieved at least two substantial level 3 qualifications[53] 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.

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[53] 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 for under 19s and 19-24 year olds between 2014/15 and 2019/20[54]
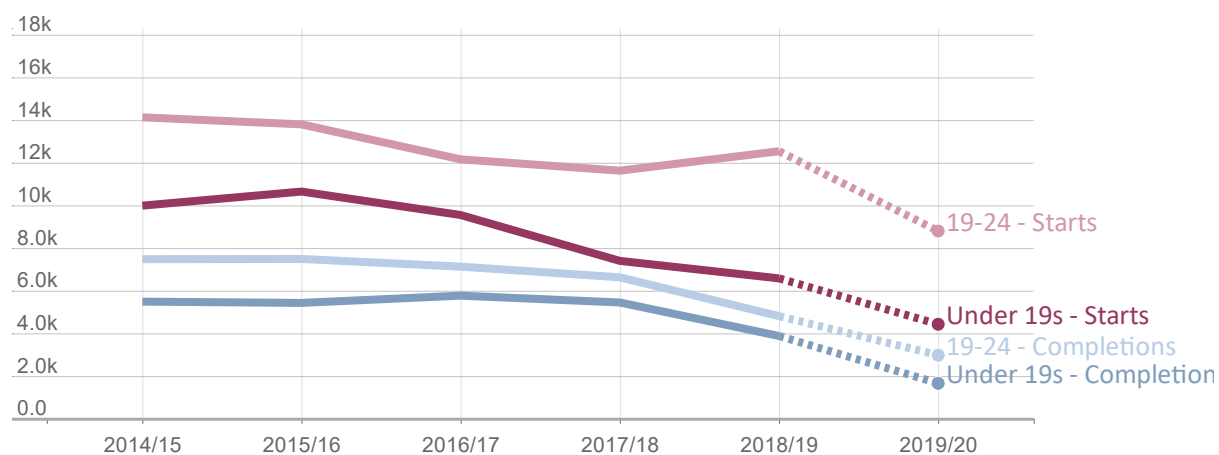
Source: Department for Education

Since 2014/15, the number of Londoners under the age of 19 starting and completing an apprenticeship programme decreased by 34% and 29% respectively.

Since 2014/15, the number of Londoners aged 19-24 starting and completing an apprenticeship programme decreased by 11% and 36% respectively.

However, over the last recorded year that has not been affected by COVID-19, there has been an increase in the number of Londoners aged 19-24 starting an apprenticeship programme, being an increase of 8%.

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[54] Data recorded in 2019/20 is 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[55].
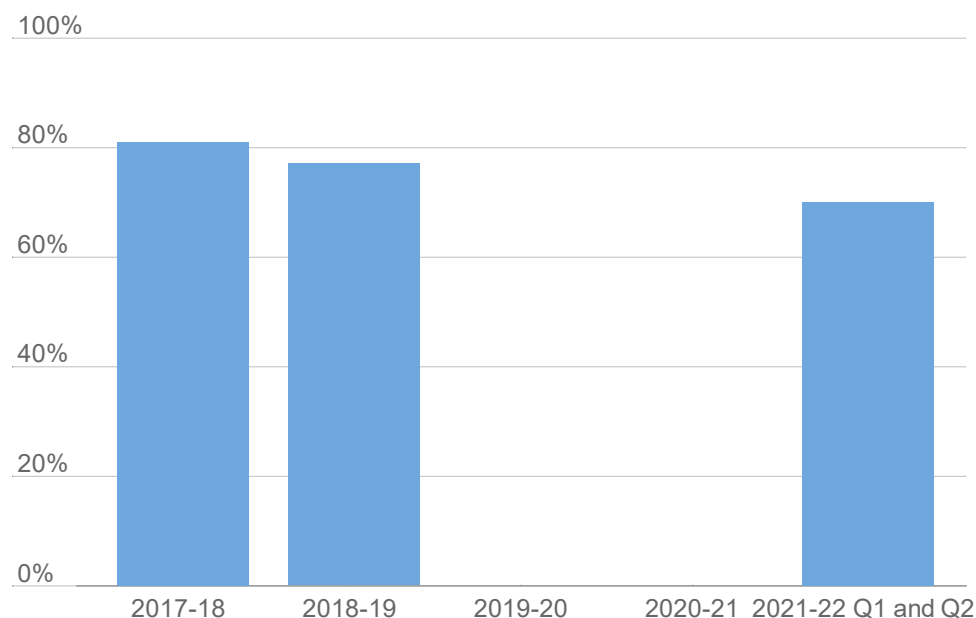
Source: Public Attitudes Survey, MOPAC

In 2021-22, 70% 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 62% agreeing compared to 83% of Londoners aged 65+.

Sixty-eight per cent of female Londoners agreed that their local area was a safe place for children and young people to grow up in compared to 73% of males.

Only 55% of Londoners from an "Other" ethnic group agreed that their local area was a safe place for children and young people to grow up in, compared to 76% of White British Londoners (the highest reporting ethnic group). This is consistent with reduced feelings of safety amongst adults.

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[55] 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.