

**CENTRE
FOR
LONDON** | **THE
LONDON
INTELLIGENCE**

The latest edition of the London Intelligence reveals [a mixture of positive and negative trends](#). Despite the continued uncertainty around Britain's departure from the European Union, London's labour market remained strong, the number of overseas nationals registering to work began to rise again and business confidence was broadly unchanged. International visitor numbers also remained stable and admissions to central London visitor attractions increased.

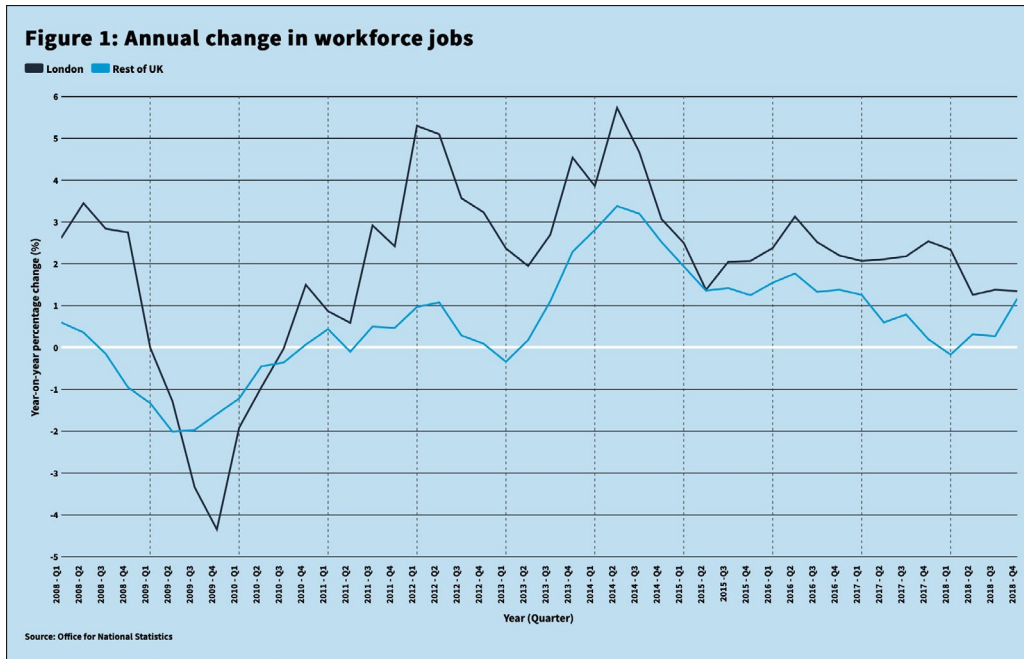
However, both the commercial and residential property markets have stagnated, with house prices and transaction volumes continuing on a downward trajectory, alongside a large drop in new build housing completions. At the same time, the colder months saw a significant rise in people sleeping rough in the capital and placed emergency departments under increased strain.

All this suggest that cuts to [local authority budgets](#) may be affecting their ability to address local needs. Our analysis showed that, despite a two per cent increase in the last year, London boroughs' per-head budgets have dropped by nearly a fifth over the last eight years, with inner London boroughs hit the hardest. All principal service areas, with the exception of children's social care, have seen budget reductions, affecting local authorities' ability to deliver frontline services. Greater control over local taxes would provide much needed stability and enable local authorities to better shape services to suit local needs.

Economy



London's labour market remains strong, with continued job growth and declining unemployment. National Insurance Number registrations increased, owing to more non-EU nationals coming to work in the capital. Although business activity was broadly steady, the take-up of office space dropped further.



The number of jobs in London grew by 1.3 per cent between Q4 2017 and Q4 2018. The UK as a whole saw a similar level of growth. Though the gap between capital and country has narrowed, the nature of jobs in each has diverged.

Whilst self-employed jobs declined by 6.3 per cent in Q4 2018 in the wider UK, they occupied the largest share of growth in London, increasing by 2.4 per cent in Q4 when compared with the previous year. Over the same period, employee jobs grew twice as fast in the UK than they did in the capital, increasing 2.6 per cent and 1.1 per cent respectively.

The rise in London's self-employed workforce has led to a number of trends, such as a growth in shared office spaces across the capital. Third party mutual apps have flourished in response to a lack of sick pay and pension provision among self-employed workers. However, underlining the growth in self-employed jobs is a polarisation between low paid workers in the gig economy and London's high earning freelancers.



London's unemployment rate was 4.5 per cent in February 2019, continuing a pattern of steady decline and reflecting the capital's increase in job numbers.

The gap between unemployment rates in London and the UK now stands at only 0.5 per cent, a significant reduction from the gap in previous decades.

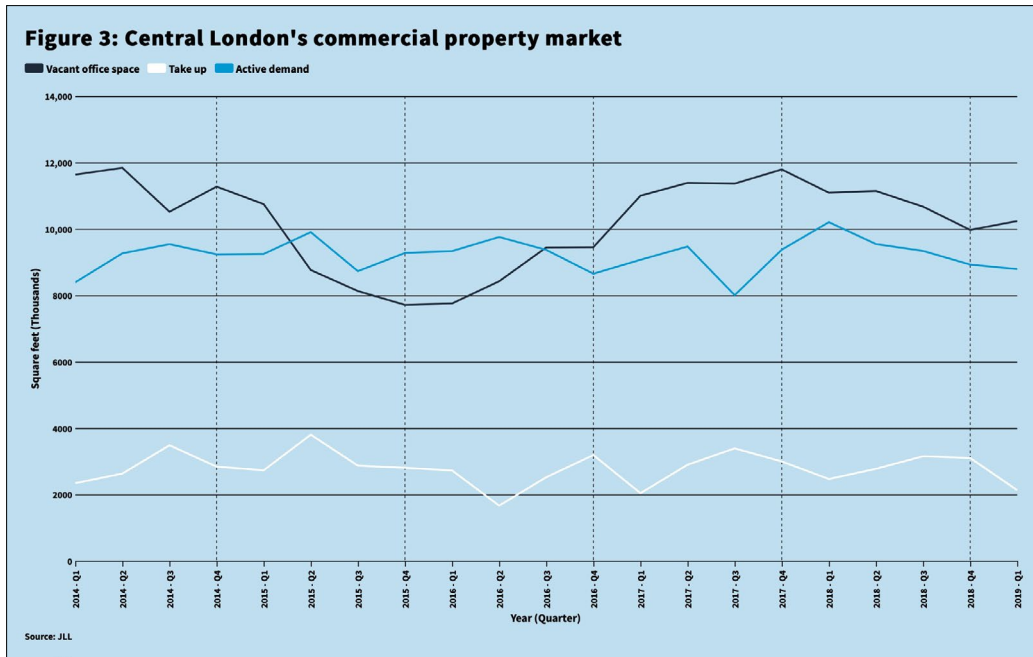
Despite a declining unemployment rate and increasing job numbers, low pay remains an issue. A recent [report by the Low Pay Commission](#) found the proportion of Londoners being paid less than the minimum wage has been growing over the last three years.



In the first few months of 2019 the UK labour market has continued to defy gravity against a backdrop of uncertainty. The employment rate rose again to a new record high, with the unemployment rate at another record low. This is also mirrored in London's ever evolving economy. It still highlights a healthy growth in terms of job creation and declining unemployment. Pay growth is the strongest it has been in two and a half years in the UK, giving some relief to households' budgets. But wage growth remains below pre-crisis norms. The only route to stronger pay growth remains a revival in productivity.

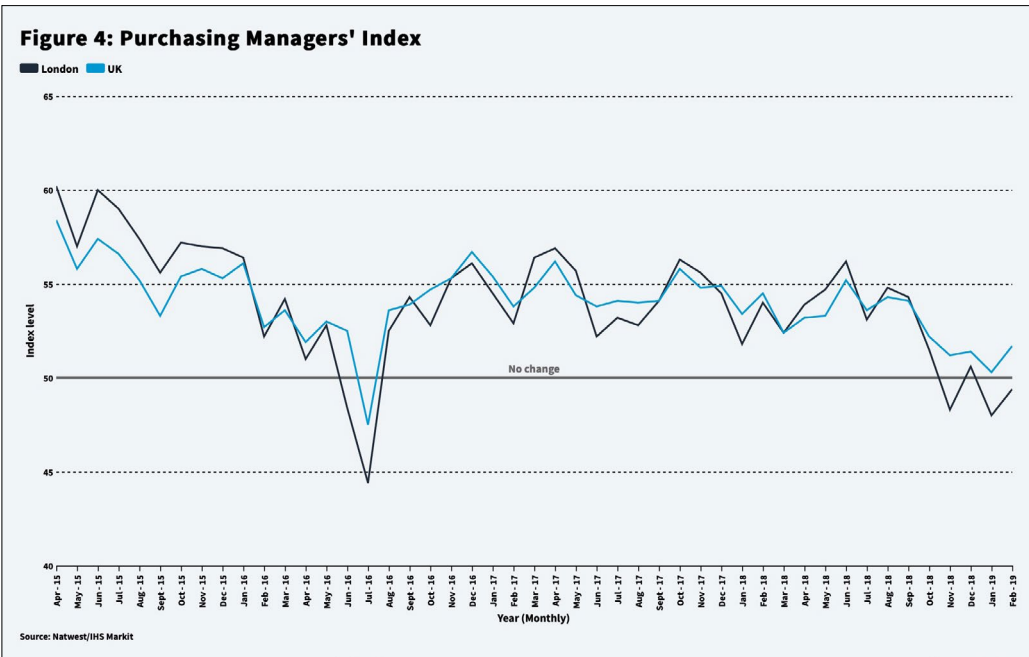
The UK's weak productivity underlines the need for the government to work with business to encourage more investment in new technologies, skills and infrastructure. This will create more and better paid jobs in London and the country overall.

[Eddie Curzon](#), CBI | [@CBIEddie](#)



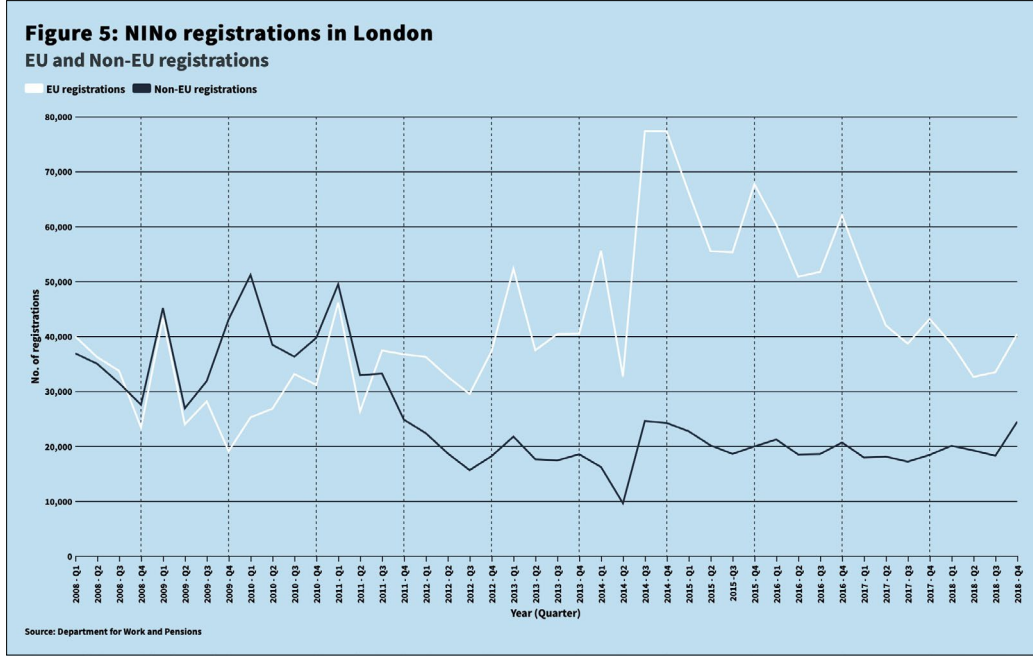
Central London commercial property data shows a slow start to the year, suggesting continued uncertainty around Britain's departure from the EU is harming business confidence.

Take up of commercial property declined by 13.7 per cent in the first quarter of 2019 when compared to the previous year. Similarly, active demand – the total space currently sought by companies – declined by 13.9 per cent in the same period. In a bid to increase take up, some retail and office landlords have been enhancing offers to tenants, including rent-free periods.



Purchasing managers' indices (PMIs) measure business activity by surveying companies on output, new orders, employment and prices; a score below 50 shows a fall in activity from one month to the next.

The Natwest/IHS Markit PMI shows declining business activity in London in the first two months of 2019. The Index stood at 48 in January 2019, though an upswing to 49.4 in February shows positive signs that expansion may not be far off.

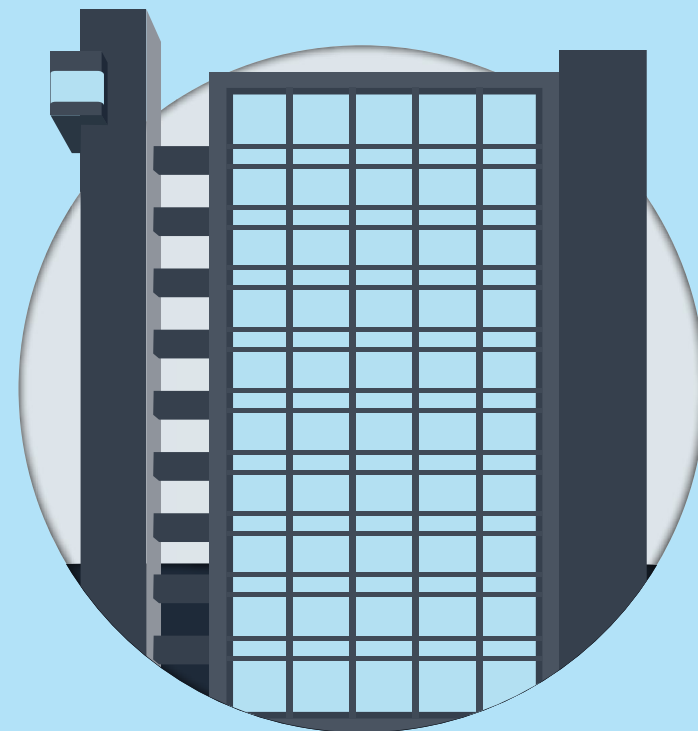


National Insurance Number registrations by people coming to London from overseas to work increased in the final quarter of 2018. There were more than 64,850 registrations in the final three months of 2018, a 5.6 per cent increase over the same period in the previous year.

Whilst these figures are not a measure of migration – they do not account for people who don't register for national insurance numbers, or for people who leave – their reflection of the political climate is evident.

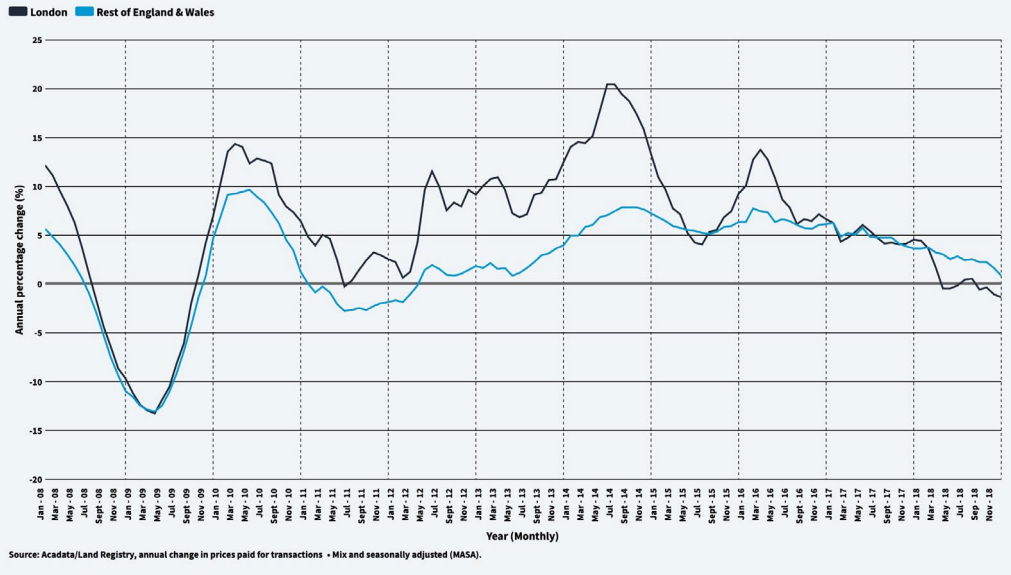
EU registrations have been declining since their peak in 2014, and this decline continued after the EU referendum in 2016. They continued to decline in Q4 2018, falling 6.3 per cent against the same period in 2017. However, this fall wasn't as sharp as the fall between Q4 2016 to Q4 2017, which was more than 30 per cent. Meanwhile, registrations by non-EU nationals have been steadily increasing, albeit from a lower base, and saw a sharp rise of 33.6 per cent in Q4 2018 compared to the previous year.

Housing



Both house prices and transaction volumes continued on a downward trajectory, with market activity largely stalled. Rent levels saw modest increases, with larger annual rises for terraced houses. There was a slowdown in planning activity, alongside a large drop in new build housing completions compared to the previous year.

Figure 6: Mean house price Annual change

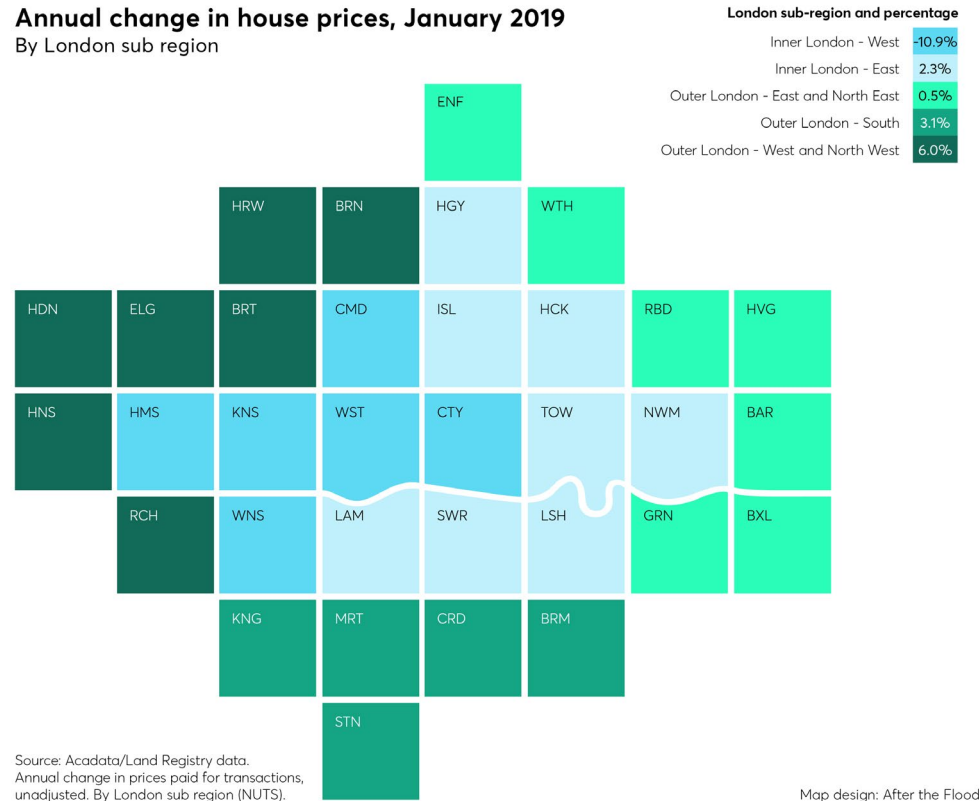


Continued political uncertainty may be leading to a market slump, with house prices on a downward trajectory since a sharp drop in April 2018.

The average house price in London stood at £618,682 in December 2018, a decline of 1.4 per cent on the previous year and the fourth consecutive month of falling prices. The negative growth experienced in London was contrasted with declining, but still positive growth, in the rest of England and Wales.

On an optimistic note, subdued house price growth, alongside [lower unemployment and rising earnings](#), have boosted the number of first-time buyers.

Figure 7: Annual change in house prices, January 2019
By London sub region



The picture of house prices is not equal across the capital. When looking at the sub-regional level, house prices in inner West London fell by 10.9 per cent in the year to December 2018, the second month of annualised decline. In contrast, prices in the rest of the capital appeared buoyant, with the strongest growth experienced in outer North West and West London.

Despite experiencing decline, average house prices in inner West London remain the highest of all London's sub regions, at £1.2 million.



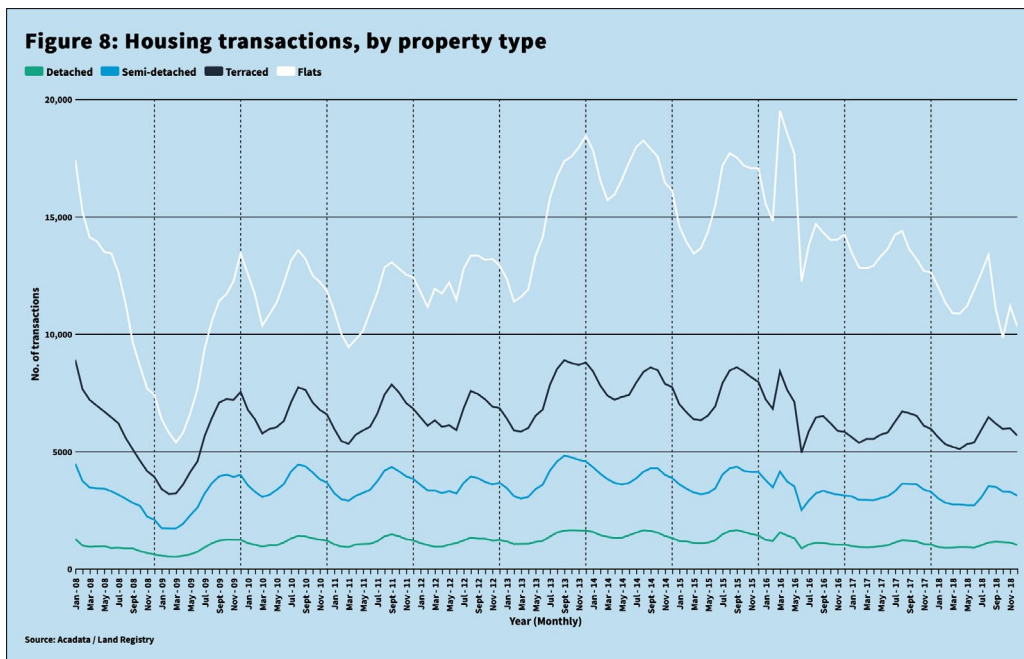
Demand continues to build in London's prime property market, while politicians in the UK attempt to resolve their differences on Brexit. There's clear evidence that buyers have manoeuvred themselves into a position that enables them to act, once the current deadlock has been broken, something that could happen at short notice. Not only are there more new buyers, but those buyers are each making more offers, increasing demand side pressure.

While demand has grown, supply has not kept pace. Vendors have acted cautiously and the number of new listings has declined across prime London markets.

Given this level of pent-up demand, we would expect a material rise in trading volumes, once Brexit uncertainty has passed. This would lead to an initial period when demand outstrips supply, which may also provide upwards pressure on pricing.

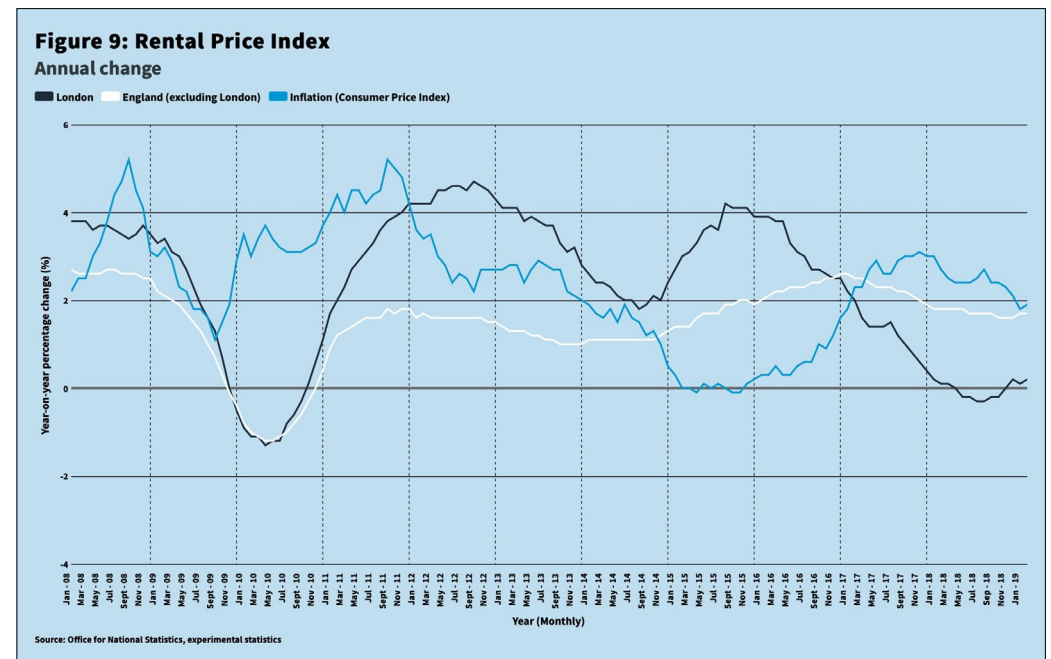
Any impact is likely to be short-lived, as the number of new property listings are likely to rise, which would lead to greater equilibrium between supply and demand. In the longer term a prolonged period of stability should see house price inflation return in prime London markets.

[Tom Bill, Head of London Residential Research, Knight Frank](#) | [@TomBill_](#)



Transaction volumes across London continue to fall, as consumer and investor confidence drops. The total number of transactions – including those made with cash – fell 12 per cent in the final three months of 2018 compared to the previous year, to just over 20,000 transactions. When looking at property types, flats account for the largest number of transactions in the capital but have also experienced the largest proportional drop in sales, down 18.2 per cent in the three months to December 2018 when compared to the previous year.

New build properties have occupied a larger proportion of the market in recent years, reflecting the government’s help-to-buy scheme. Despite this, suppliers have been criticised for failing to deliver high quality homes, with many remaining empty as the number of buyers slows.



The Office for National Statistics’ experimental indices of rental prices show private sector rents in London began to pick up at the start of the calendar year, though growth remained negligible.

Rental price increase in London was virtually flat in the year to February 2019, at 0.2 per cent, compared to an increase of 1.7 per cent for the rest of England.

Figure 10: Annual rental change, by property type

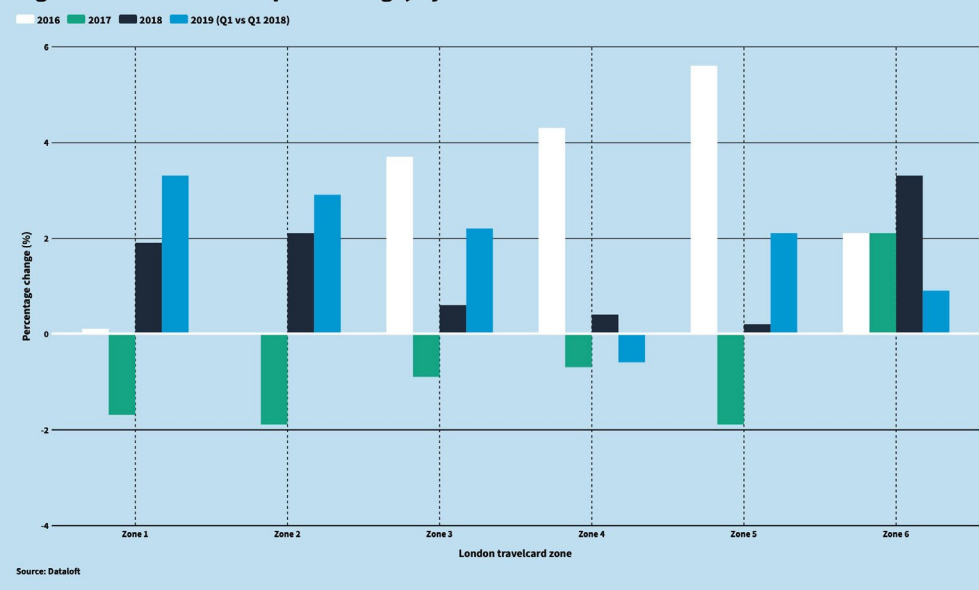
Year to	1 bed flats	2 bed flats	3+ bed flats	Terraced houses	Detached / Semi-detached houses	ALL
2015 - Q4	6.9%	6.9%	5.4%	9.3%	11.4%	8.7%
2016 - Q1	6.4%	3.7%	0.0%	4.8%	2.5%	4.4%
2016 - Q2	1.4%	1.7%	-1.0%	5.2%	2.6%	4.0%
2016 - Q3	2.8%	0.7%	1.2%	6.1%	8.9%	3.4%
2016 - Q4	1.4%	-1.3%	-2.7%	4.4%	4.7%	0.9%
2017 - Q1	0.7%	-1.7%	-3.4%	1.3%	3.1%	-0.4%
2017 - Q2	0.9%	-0.6%	-0.7%	-1.0%	2.5%	-0.6%
2017 - Q3	-0.7%	-1.0%	-1.8%	-2.6%	0.3%	-1.7%
2017 - Q4	1.2%	2.5%	-0.4%	-1.1%	-3.1%	0.0%
2018 - Q1	-0.8%	1.9%	2.7%	-2.7%	5.1%	0.4%
2018 - Q2	-1.0%	2.3%	3.5%	-2.4%	-0.5%	-0.3%
2018 - Q3	1.7%	2.5%	0.1%	2.9%	4.4%	2.0%
2018 - Q4	1.2%	2.8%	3.4%	4.8%	9.1%	2.7%

Source: Dataloft

In contrast, Dataloft figures on actual rents paid for new lettings indicate that London’s rental market is strengthening, as new supply into the market slows. Average rents paid in London increased by 2.6 per cent in Q1 2019 compared to the previous year. However, there was variation across property types. Terraced houses experienced the fastest annual growth in the first quarter of 2019, with rents increasing 5.2 per cent. Single bedroom flats also experienced rental growth above the Londonwide average, at 3.1 per cent in the year to Q1 2019. In contrast to previous quarters, rental prices for larger houses fell, with detached and semi-detached properties experiencing an annualised 3.8 per cent decline.

As more tenants move into the private rental sector, there have been attempts to improve tenure stability. For example, the [government recently announced plans](#) to abolish Section 21 notices, which currently allow landlords to remove tenants without formal reason.

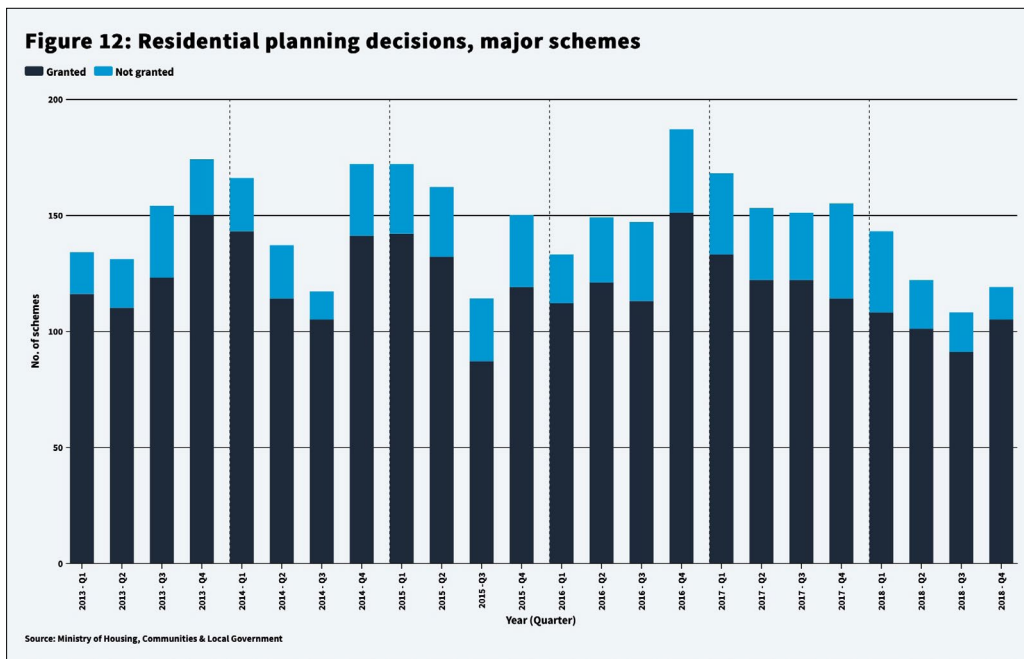
Figure 11: Annual rental price change, by London travel card zone



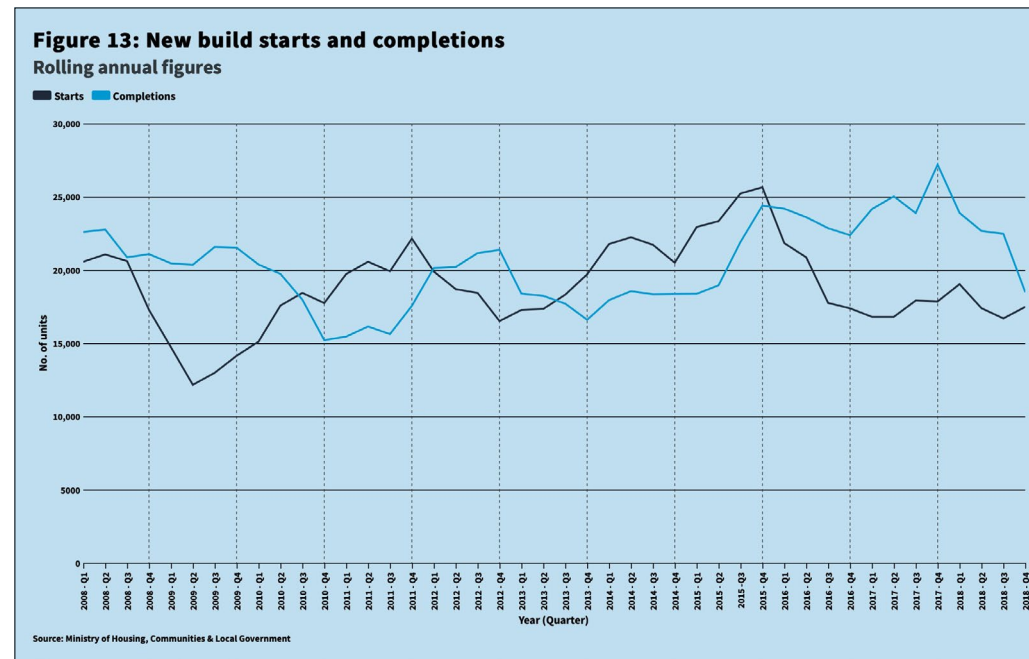
Source: Dataloft

Across London, the pace of rental price change varies. The highest growth in rental prices paid was recorded in zones 1 and 2 – with an annualised increase of 3.3 and 2.9 percent respectively in Q1 2019. The only area to experience a decline in rental prices paid was outer London’s zone 4, with prices falling 0.6 per cent over the same period.

Increases were also experienced in zones 5 and 6 – including Croydon, Bexley and Sutton – as some renters look further afield in search of better value for money.



Local authorities across London made a total of 2,453 planning decisions in the last quarter of 2018. This represented a slowdown in planning activity – a nine per cent drop on the previous quarter and a 12 per cent drop on Q4 2017. 105 major schemes (88 per cent of all major planning applications) were granted planning permission – an increase of 15 per cent on the previous quarter, but a decline of eight per cent on the same period in the previous year. By comparison, a total of 1,622 minor schemes (69 per cent of all minor scheme applications) were granted permission – a 12 per cent drop, compared to the previous year.



The end of 2018 saw new build housing completions fall sharply to just under 18,500 homes in the previous 12 months, a 32 per cent decline on the previous year. New build starts remained around 17,500 in the year to the end of 2018, in line with the previous two years.

The slowdown in activity may result from political and market uncertainty having led developers to take a more cautious attitude to their pipeline over the past two years.

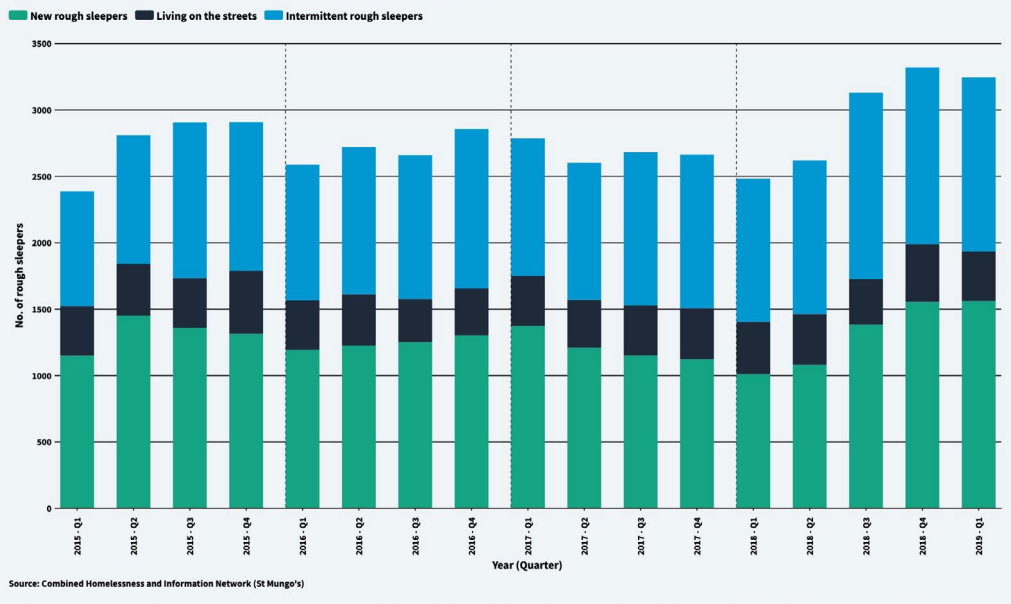
[Recent research](#) showed the decline in construction has been focused on central London (Travelcard zones 1 and 2), with outer London experiencing record high numbers of construction starts and sales.

Society



There has been a significant rise in the number of rough sleepers in the capital. The number of people visiting London remained broadly unchanged, while admissions to visitor attractions increased, particularly in central locations. Brexit remains Londoners' top worry, but concern over housing, education and poverty increased. Overall crime levels, including for knife crime, were stable, though injuries from knife crime reduced slightly.

Figure 14: Rough sleeping in London, by type

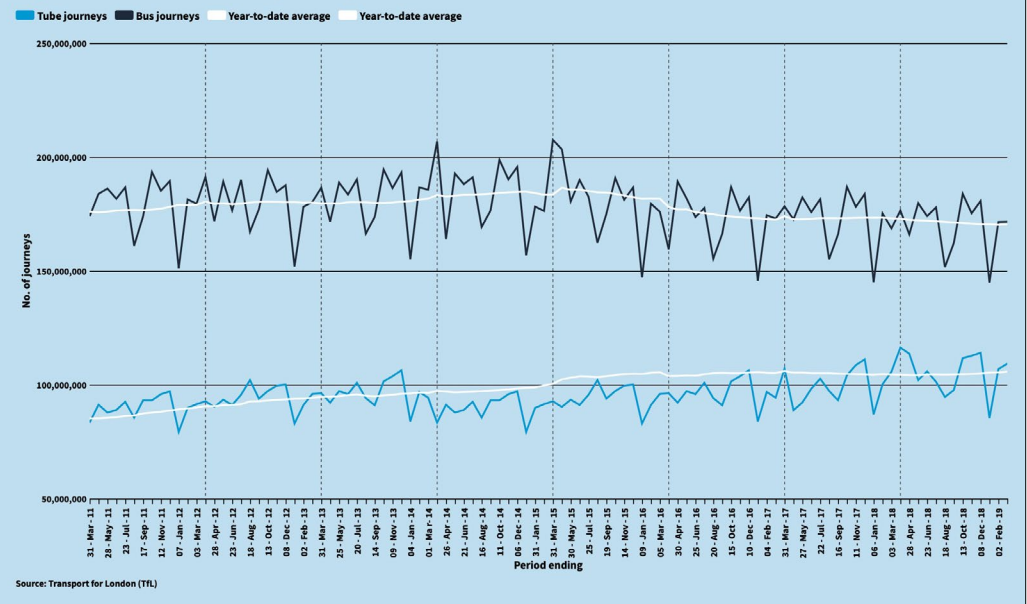


The number of people recorded as sleeping rough in London increased by 31 per cent to over 3,200 individuals in the first three months of 2019 when compared to the same period in the previous year.

This overall increase was driven by a 55 per cent rise in the number of new people sleeping rough in London, to 1,550 people. Over the same period, individuals sleeping rough intermittently increased by 21 per cent, whilst those living on the streets decline by 5 per cent.

The continuing shortage of affordable housing in London, cutbacks in other support services, and the lack of security in private rented housing may all be playing a part in the sharp rises in rough sleeping in the last six months of 2018.

Figure 15: Tube and bus journeys



Despite monthly variations, ridership journeys on the underground have been broadly steady. The year-to-date average for trips on the London Underground reached 105.8 million in the period ending March 2019 – a one per cent year-on-year increase. By comparison, bus journey figures continue a longer term downward trajectory, with a one per cent annual average decline over the same period. Ridership on London's bus network continues to occupy the largest share of all public transport usage, at 170.4 million trips on average per month in the year to March 2019.

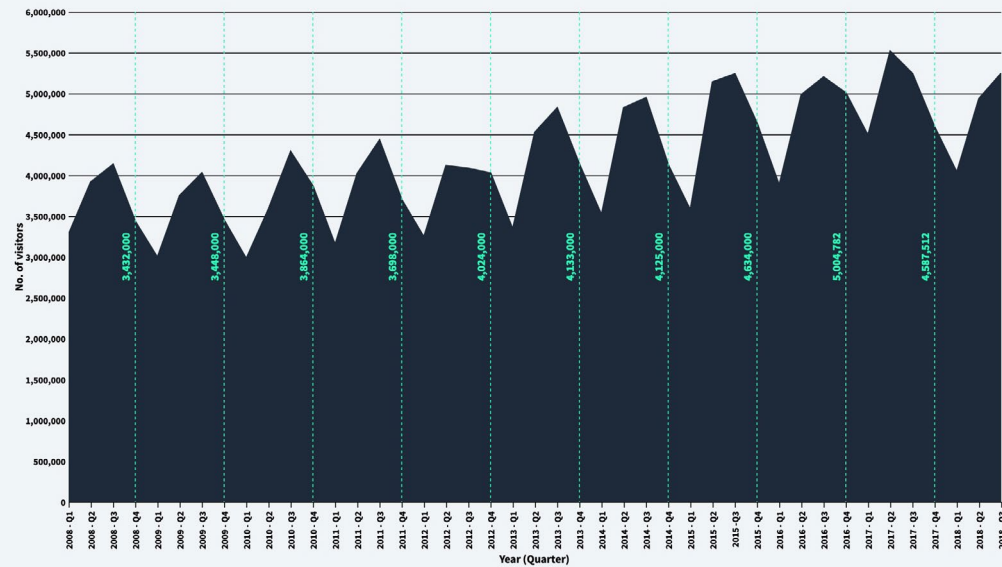
It will be interesting to see if ridership increases, as external providers connect users to the network through their own platforms. For example, Uber recently [announced](#) that they will integrate London public transport information into their own app, with real time information and start-to-end directions.



People sleeping rough in London are supported by outreach workers from homeless charities to quickly move off the streets and into accommodation. Though the number of rough sleepers reached 3,200 in the last quarter, we know that 81 per cent of new rough sleepers only spent one night on the streets. There is a large and growing number of people from Europe and the rest of the world who are sleeping rough, half of everyone seen sleeping rough last quarter were born outside the UK. This group of people often do not have access to benefits and housing and it is difficult for homeless charities to support them off the streets.

Catherine Parsons, Director of Operations, Thames Reach
| **@ThamesReach**

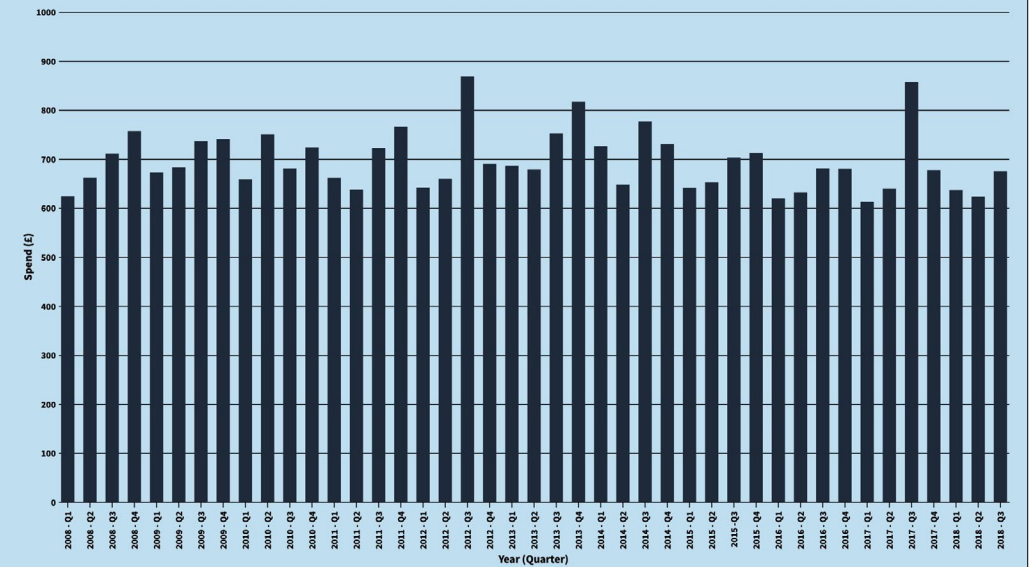
Figure 16: International visitors, per quarter



Source: International Passenger Survey

Despite seasonal variations, 5.2 million international visitors came to the capital in the third quarter of 2018. This remained largely unchanged from the previous two years. While numbers have not returned to their Q2 2017 peak, this resilience indicates that the impact of terrorist attacks that summer may have been limited. The average visitor spent six nights in the capital, marginally lower than the UK-wide figure of eight.

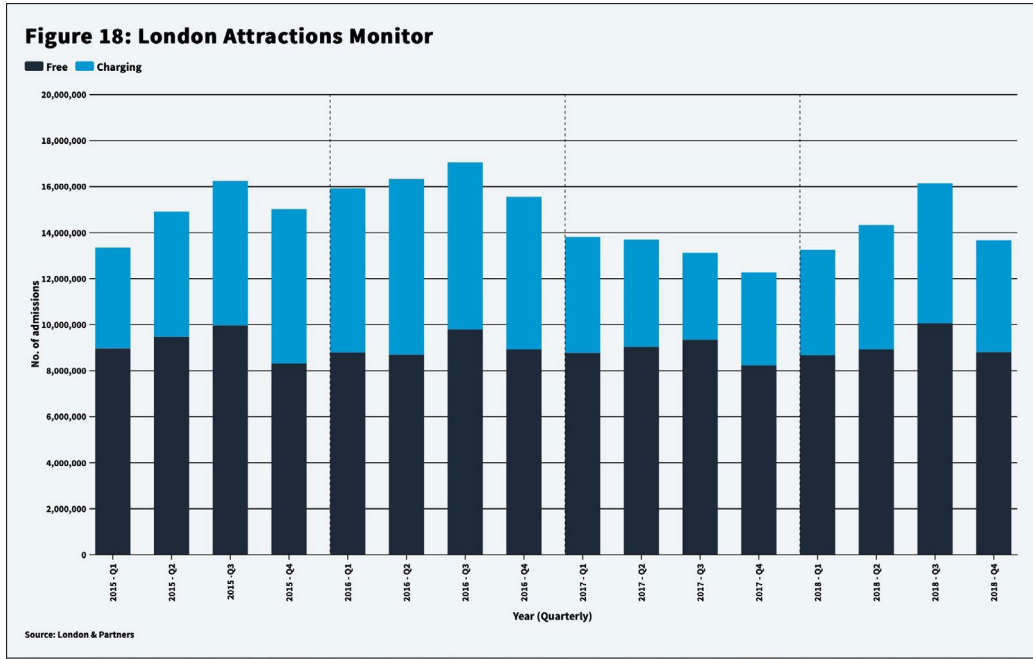
Figure 17: Spend per visitor



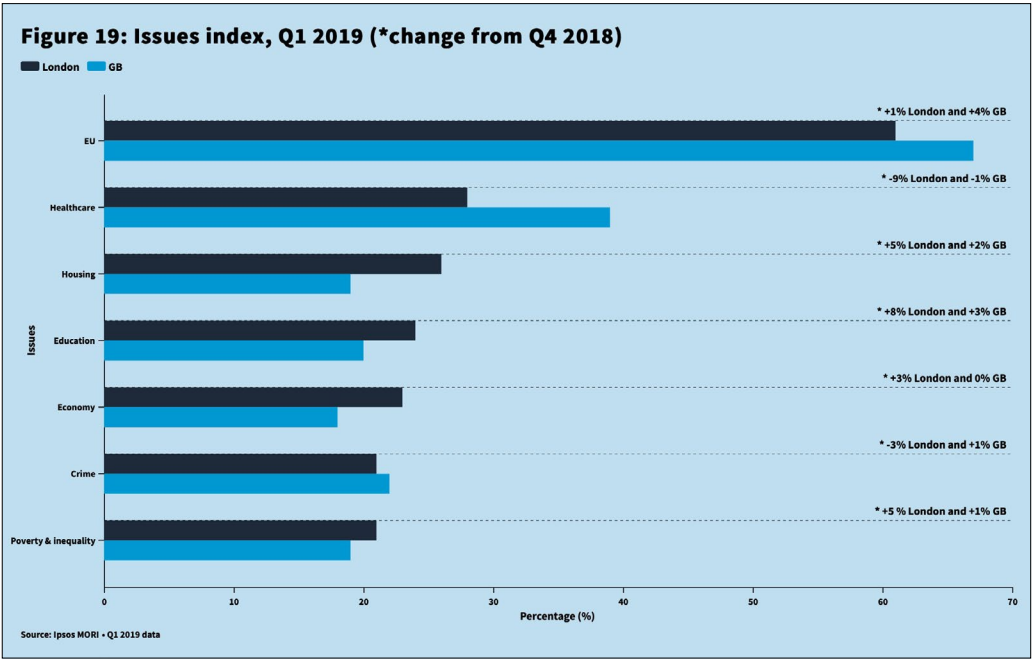
Source: International Passenger Survey - Adjusted to 2018 prices

Despite broadly unchanged visitor numbers, the combined spend of visitors to the capital fell to £3.54 billion in the third quarter of 2018, equating to half of all tourist spending in the UK. The average visitor spent £674.69 in Q3 2018, 21 per cent less than its unusually high level in the same quarter in 2017.

New [research from London First](#) has found that a fifth of international visitor spending takes place outside central London and 46 per cent of London's hotel guests stay here.



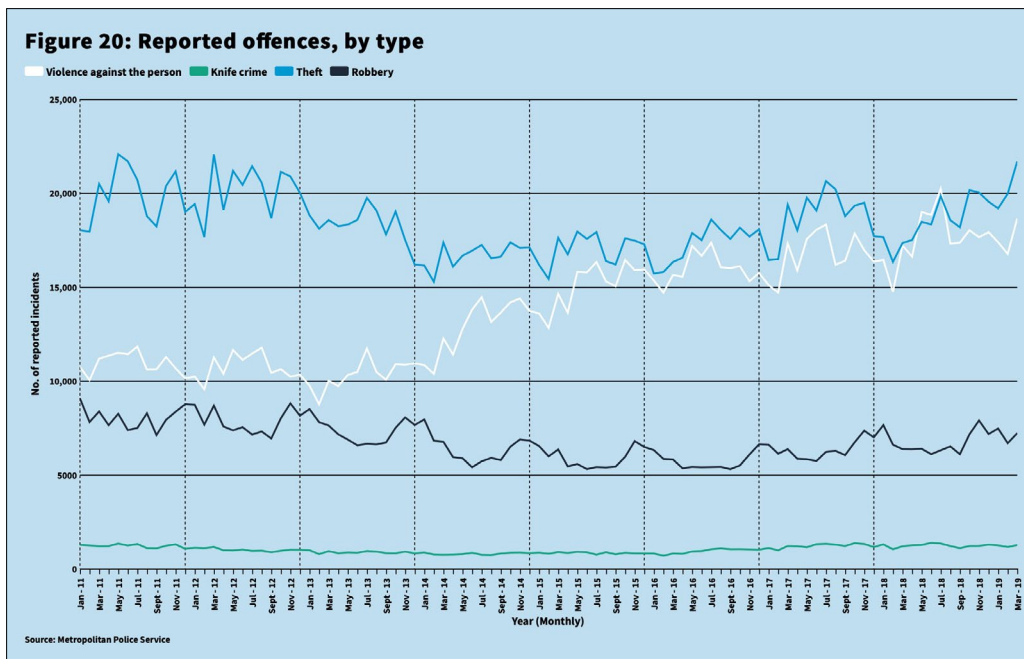
London attractions had a comparatively strong final quarter of 2018, with admission figures up 7 per cent on the previous year, to 13.65 million total admissions. Subsiding security fears may well have contributed to an increase in overall visitor numbers, particularly in central London. Free attractions saw a larger increase in admissions, at 5.9 per cent, compared to 3.5 per cent for paid attractions.



Unsurprisingly, Brexit remains the biggest issue occupying Londoners' concerns, with two thirds (67 per cent) ranking it as a top concern in the first quarter of 2019.

The quarterly issues index from Ipsos MORI shows that worry over Brexit has displaced concerns over healthcare and crime, which saw a quarter-on-quarter decline of nine and three per cent respectively. On the other hand, Londoners seem to be more concerned about housing, education and poverty.

Yet Londoners appear to be less worried than their counterparts in the wider UK. In the first quarter of this year concern for Brexit saw a quarter-on-quarter increase of one per cent in London, compared to four per cent in the rest of the country.

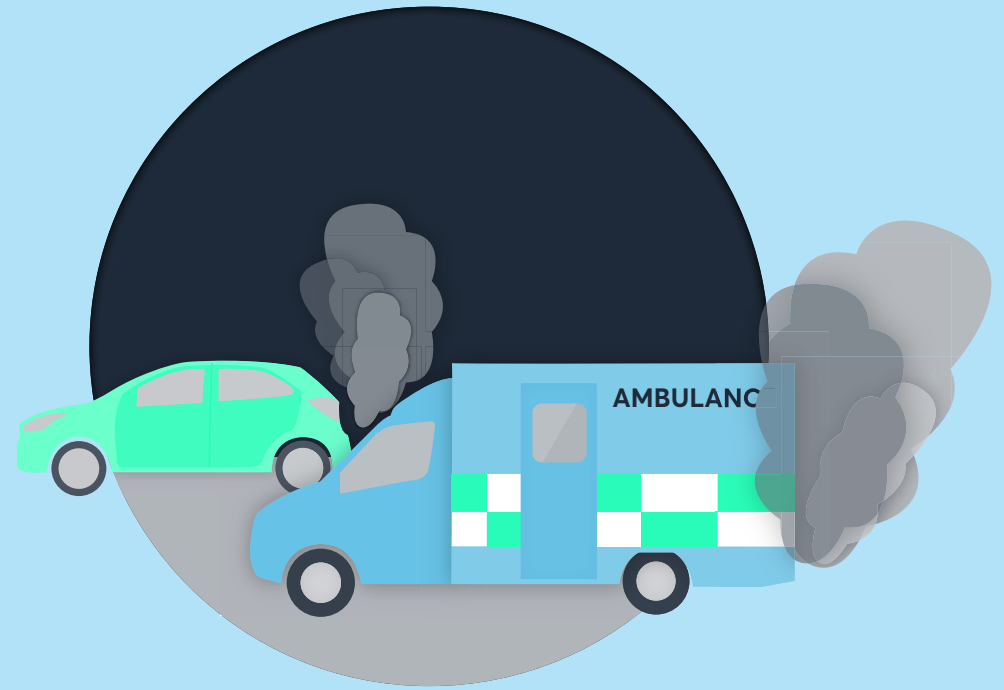


In the three months to February 2019, Met Police recorded an average of 71,381 total notifiable offences per month, which represents an increase of 8.6 per cent on the same period the year previously.

Looking at specific types of crime, recorded knife crime fell slightly by one per cent in the first quarter of 2019 when compared to the previous three months, to 3,640 offences (but rose slightly compared to the same period last year). The number of these crimes resulting in injury saw a six per cent proportional decline over the same period, to 920 incidents. Violent crimes against persons also saw a one per cent quarter-on-quarter decline in the three months to March 2019, though reported incidences have increased nine per cent when compared to the previous year. Theft incident numbers rose by 3.5 per cent between Q4 2018 and Q1 2019.

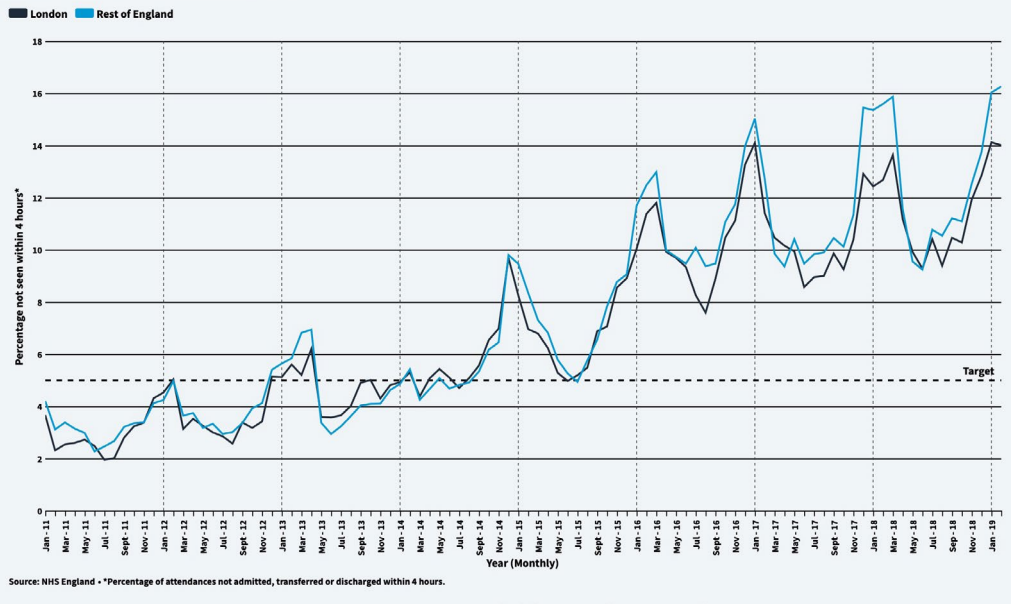
Concerns that cuts to police funding are harming London's ability to guard against crime [continue to be raised](#). In response, Metropolitan Police has been [allocated more than £20 million](#) from a new central government fund for police authorities to tackle violent crime.

Healthcare and environment



Colder winter weather placed London's emergency departments under increased strain, while outpatient demand pressures have begun to ease. Although all roadside pollutant concentrations previously dropped below legal limits, levels peaked again in the last few months.

Figure 21: A&E performance

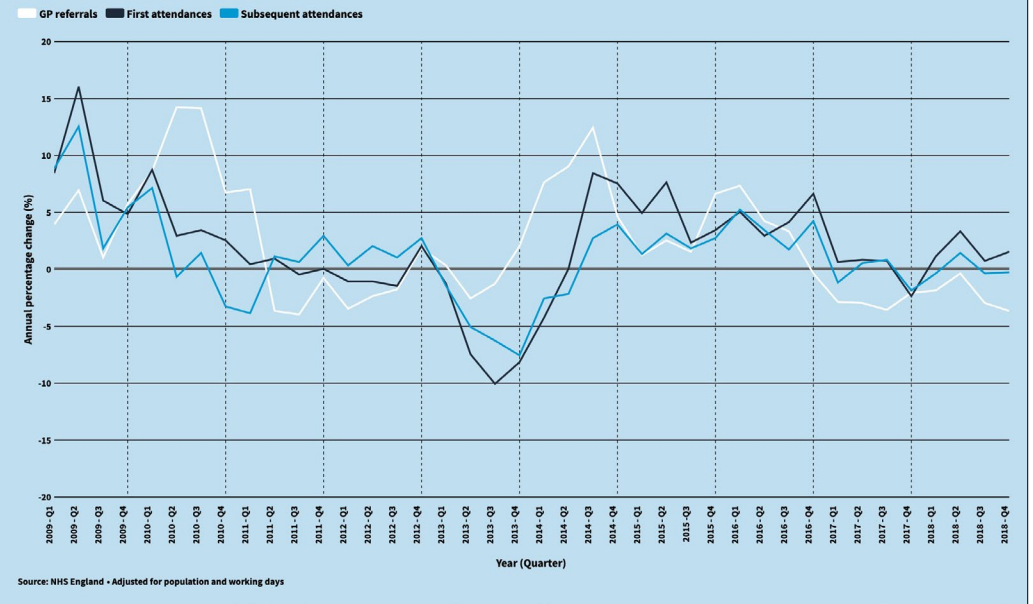


London's emergency departments were placed under increased strain during the colder winter months, with a continuing decline in performance against the NHS waiting standard.

The percentage of patients not seen within 4 hours of arrival increased from 12.7 to 14 per cent between February 2017 and February 2018. A recent report in the British Medical Journal suggests that the continuing failure to hit such a publicised target, despite targets' ability to distort priorities in the normal course of events, indicates a significant inadequacy of resources.

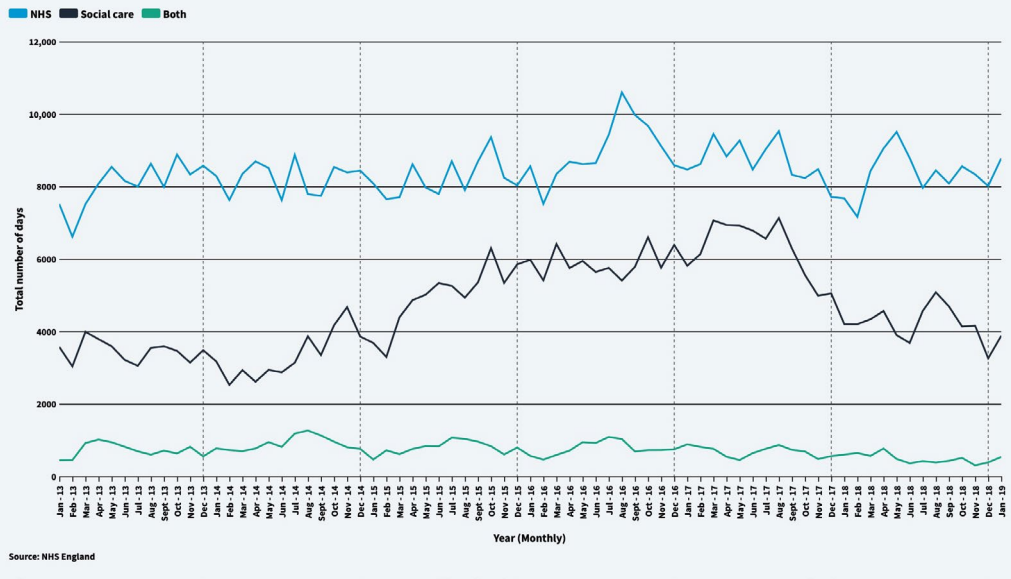
A review of the four-hour waiting target is [currently underway](#) to ensure the measure keeps pace with the changing climate. Centre for London will review what data and targets to publish for future editions of The London Intelligence.

Figure 22: Outpatients: referral and attendance rates



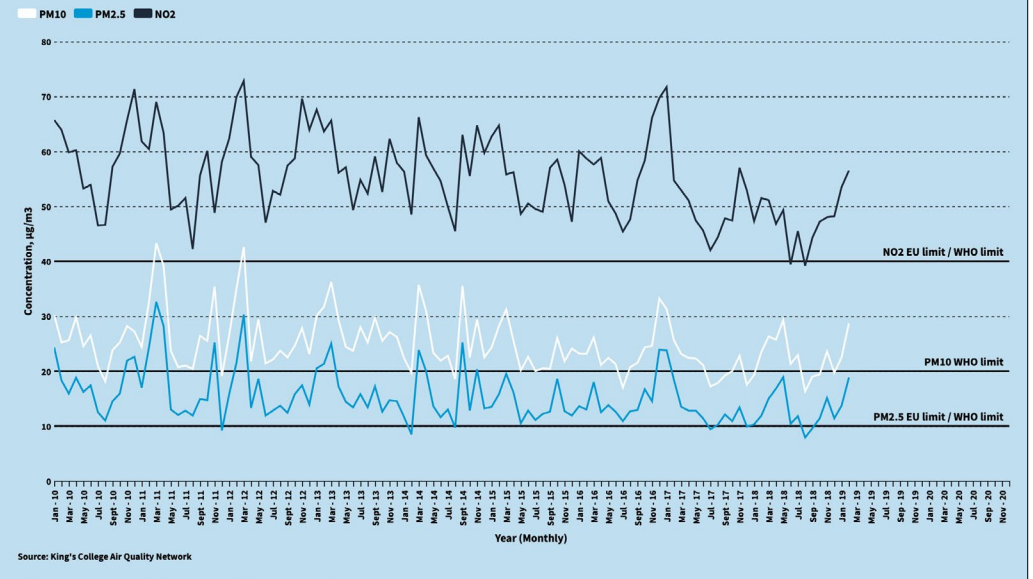
Outpatient demand pressures on London's hospitals eased in the final quarter of 2018, when adjusted for population and working days. The number of GP referrals declined by four per cent in the year to Q4 2018, whilst the number of subsequent attendances remained largely static, declining 0.3 per cent.

Figure 23: Delayed transfers of care
By responsible organisation



Overall delayed transfers of care (DTOC) slightly increased at the start of the year, in line with annual demand patterns. January 2019 also experienced an annualised growth of six per cent, to just over 13,000 days in total. Breaking the total figure down by responsible organisation, delays attributed to social care fell by eight per cent in the year to January 2018 to just under 11,300 days. In contrast, delays attributed to the NHS saw an annualised increase of 19.5 per cent.

Figure 24: Levels of roadside pollution in London
By type of pollutant, with EU/WHO limit



Though there are signs of longer term improvement, the colder months tend to bring about worsening air quality. As the graph shows, although all roadside pollutant concentrations dropped below the World Health Organisation's legal limits, concentration levels peaked again in the last few months.

Roadside concentrations of large particles (PM10) increased by 22 per cent in February 2018 when compared to the previous year. Average concentrations of finer particulate matter (PM2.5) increased by 18 per cent over the same period.

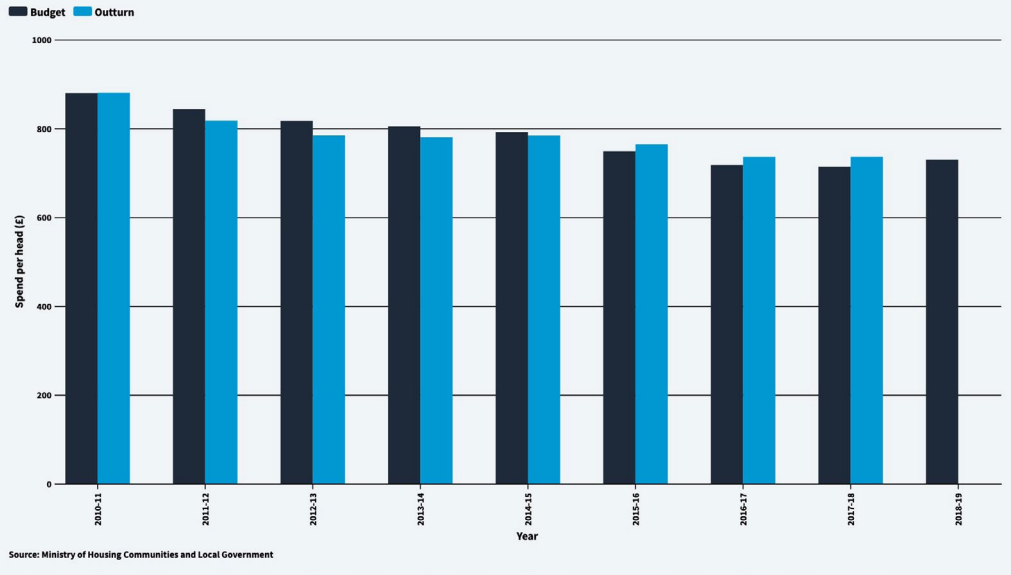
April saw the introduction of the Ultra Low Emission Zone (ULEZ) and the incorporation of Private Hire Vehicles (PHVs) into the Congestion Charge. The impact of these policies on air pollution levels remains to be seen. Whilst the ULEZ is expected to help reduce NO2 emissions – the majority of which come from vehicle exhausts – there are concerns that levels of particulate matter – emitted through road, brake and tyre wear – will be largely unaffected.

Local authority spending



One year after our first local authority spending special, new data shows that cuts to services delivered by London's local authorities has continued. London councils have little capacity to raise their own revenue, with power and funding concentrated at the central government level. The pressures of funding reductions and rising demand has required London's local authorities to innovate, though the impact of cuts are increasingly seen in frontline services.

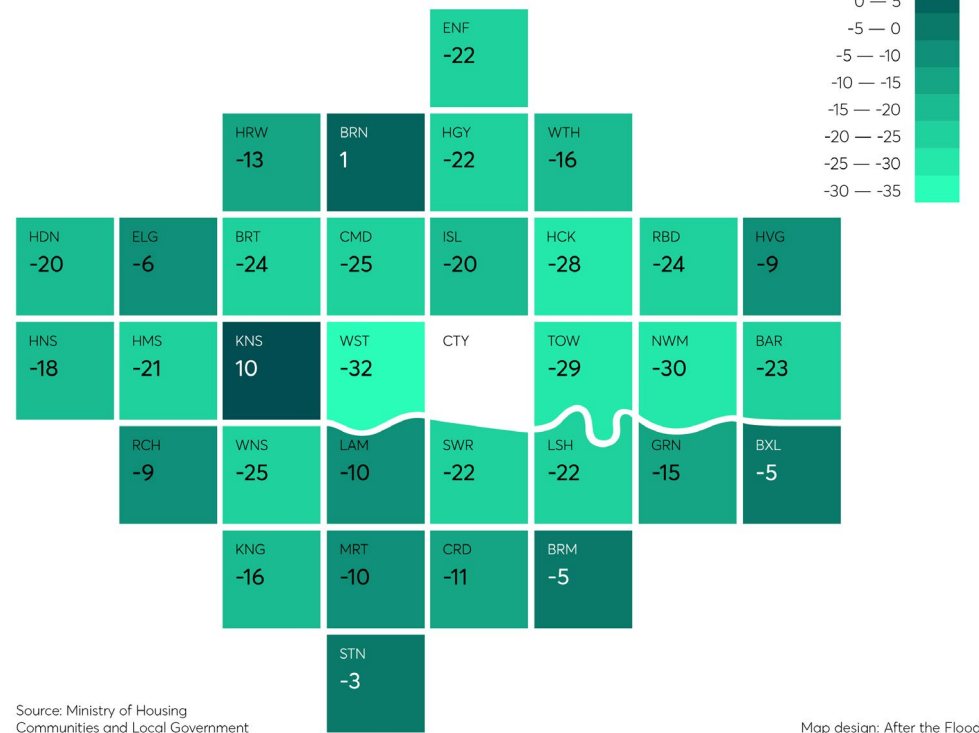
Figure 25: Service expenditure per head
Excluding public health, education and police services



Total budgeted service expenditure (excluding education, public health and police services) by London's 33 councils fell from £7 billion in 2010/11 to just over £6.5 billion in 2018/19, a fall of eight per cent. When taking population growth into account, budgeted spending per head fell much steeper, from £879.42 in 2010/11 to £729.10 in 2018/19, a fall of 17 per cent. When inflation is taken into account the fall is nearly 35 per cent.

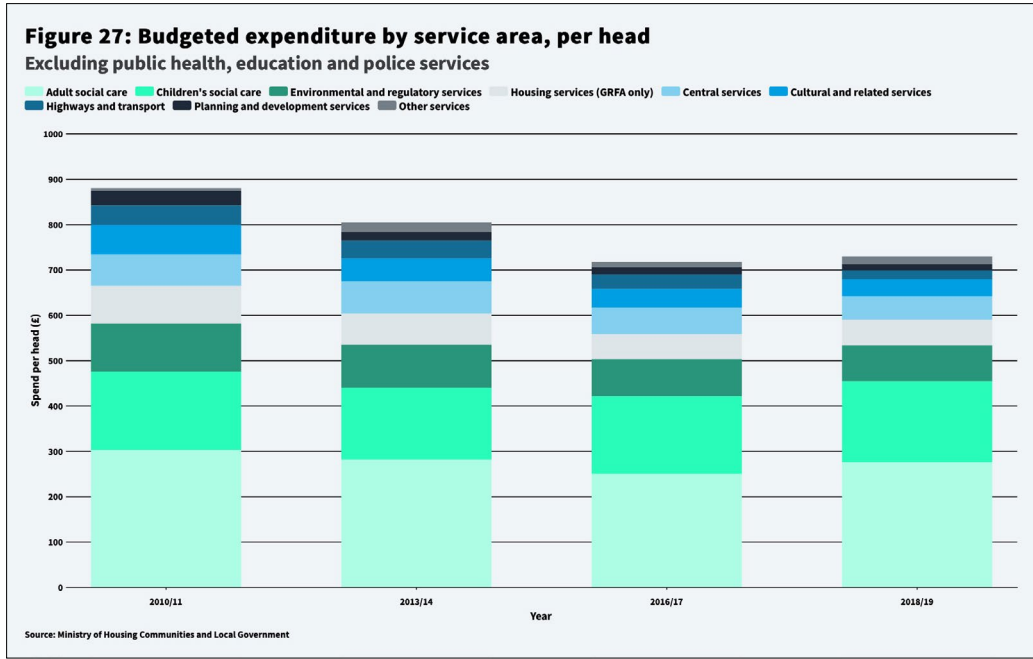
While local authorities spent less than they budgeted in 2011/12 and the following three years, that pattern has been reversed since 2015/16, indicating tighter fiscal circumstances, and greater pressure on reserves.

Figure 26:
Council budget change, per head, 2010/11 B to 2018/19 B
Excluding public health, education and police services



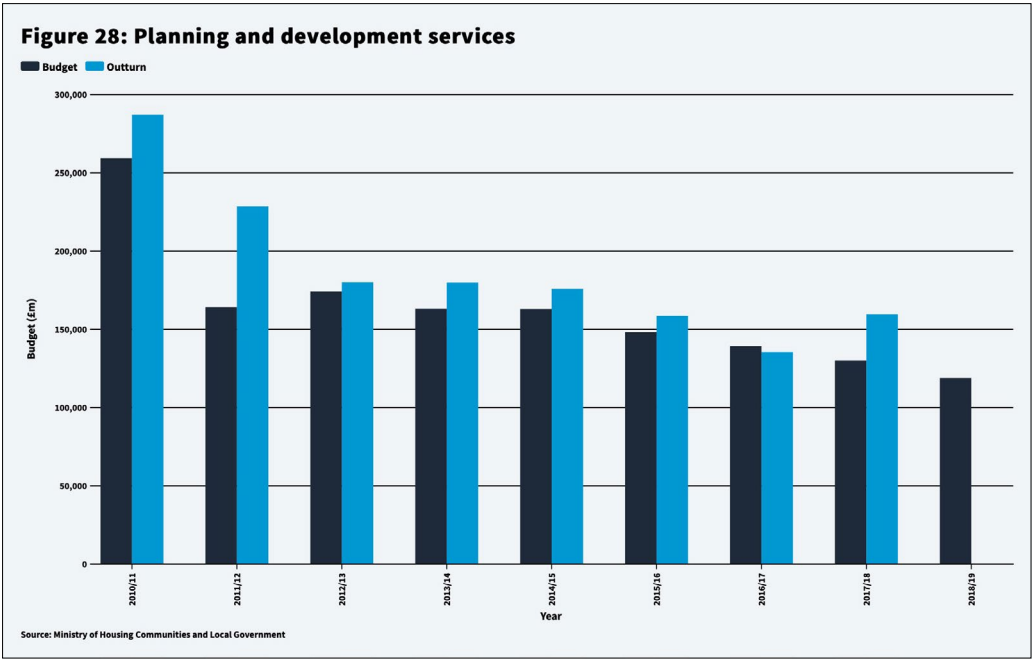
Even without accounting for inflation, almost all boroughs have seen significant reductions in budgeted expenditure per head since 2010/11. Just as cuts have fallen hardest on higher spending urban councils nationwide, it has been some of London's previously highest spending inner city local authorities –including Westminster, Newham, Tower Hamlets, Hackney, Camden and Wandsworth – that have seen per capita cuts of 25 per cent and above.

*Figures from the City of London Corporation have been excluded, as their unique nature makes for difficult comparison.



Breaking down budgets by service area shows declines in every principal service area, with the exception of children's social care, though social services spending has recently picked up slightly. Between 2010/11 and 2018/19, planning and development services budgets saw the biggest per capita decline at 59 per cent, followed by highways and transport at 54 per cent. Cultural and related activities budgets also dropped – by 42 per cent.

Local authorities have been directing scant resources to core statutory services. The government has also intervened to support social care, which accounts for an increasing proportion of budgets, rising from 54 to 62 per cent of the expenditure covered in this survey between 2010/11 and 2018/19. With demand driven by the growing needs of an ageing population and pressure on the NHS to free up beds, the government has allocated more grants to support social care and boroughs have also been able to charge an additional adult social care precept on top of council tax. As a result, adult social care budgets, which have declined over the long term, increased by ten per cent between 2016/17 and 2018/19. Children's social care budgets increased by five per cent over the same period.



Despite the increase in demand implied by London's housing delivery target increasing from 25,000 to 43,000 units in 2015/16, and a new target of 65,000 homes being proposed in the draft London Plan, local authorities have seen significant cuts to their planning and development control budgets.

Detailed analysis indicates that spending reductions have been achieved primarily through reducing expenditure with income remaining broadly steady (from planning fees, planning performance agreements etc). However, as the graph shows, outturn expenditure has been higher than budgeted every year, reflecting the demands on these services. Although actual spending increased by 18 per cent between 2016/17 and 2017/18, budgets declined by nine per cent between 2017/18 and 2018/19.

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Government funding for London boroughs has fallen 63 per cent since 2010. After Council Tax, overall spending power has reduced by a third. Meanwhile, London's population has grown by a million and demand for complex support for our most vulnerable residents has risen even faster. All services other than social care have been cut. Spend per head on adult social care has reduced. Only children's services have seen any increases. Variations in spend between councils have narrowed as budgets are squeezed and efficiencies captured. Cuts on this scale cannot continue. The Spending Review later this year must seriously address the sustainability of vital local services.

[Guy Ware](#), Director of Finance and Performance, London Councils
| [@londoncouncils](#)

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It does not come as a surprise to see that in the last eight years planning and development service budgets have more than halved, with housing delivery targets more than doubled. From our conversations with planners across the country, we know that planning departments feel an enormous pressure to deliver on housing numbers, rather than take a pro-active approach to creating high quality mixed-use neighbourhoods. We are however seeing a new wave of local authorities finding innovative ways to take greater control through direct delivery, enabling a holistic approach to social value and strategic regeneration. Authorities not only need the financial and political support to enable this pro-active approach, but the skills and capacity to deliver this.

[Pooja Agrawal](#), Co-founder, Public Practice
| [@AgrawalPooj](#) [@PRACTICEPUBLIC](#)

Measure

Explanation

Workforce jobs

Workforce jobs is a quarterly measure of jobs in the UK by the ONS, and is the preferred measure of short-term employment change by industry. A variety of outputs are produced, including industry, region, gender and full or part time status. It is a compound source from a range of employer surveys, household surveys, and administrative sources; it has a sample size of 83,400 nationally. The estimates are seasonally adjusted. More information can be found [here](#).

Unemployment

These figures are from the quarterly regional labour market reports produced by the ONS, and are based on an International Labour Organisation definition of unemployment. The figures come from a combination of surveys of households and businesses, including the Labour Force Survey. The numbers are seasonally adjusted.

Commercial Property Vacancy

The commercial property figures are sourced from JLL's Central London Office Market Report. Vacancy rates refer to the proportion of floor space that is unoccupied. Active demand relates to serious interest in commercial floor space, while take-up is the actual amount that is purchased or leased. More information can be found [here](#).

Purchasing Managers' Index

The Regional PMI is compiled by IHS Markit for NatWest. It compiles responses from over 1,200 private sector manufacturing and services firm, which is representative of the economy's structure, and acts as a health check of business activity. The number is the seasonally adjusted proportion of those reporting positive responses, plus half of those reporting no change. A score of 50 indicates no change in activity on the previous month.

National Insurance Number (NINo) Registrations

These statistics are an extract of the volume of adult non-UK nationals registering within the UK for a National Insurance Number, which they need to work or claim benefits / tax credits. Figures are based on when the person registers on the HRMC Recording and PAYE system, which may be some time after they entered the UK. These statistics are not a direct measure of long-term inward migration, and have 'national statistics', not 'official statistics' status.

House prices and transactions

The house price and transaction figures come from the LSL/Acadata England & Wales House Price Index. It uses actual transaction volumes and prices based on Land Registry data, and is updated monthly. The most recent monthly price (March 2018) accounts for c. 38 per cent of transactions, two months previously c. 88 per cent, and almost all for three months previously. The most recent monthly price has not been used in this issue due to the incompleteness of the data. House prices are mix and seasonally adjusted at the London level, but not sub-regional level, or with property type changes.

Rental Price Index

The Office for National Statistics' experimental Rental Price Index (RPI) is calculated using actual rental data collected for the Valuation Office Agency, and tracks the change in the prices paid for renting residential property from private landlords in Great Britain. More information can be found [here](#).

Measure

Explanation

Rental Market Data	<p>Rental market data is supplied by Dataloft, based on rent paid data supplied under contract from leading tenant referencing companies. The large and growing dataset of rent-paid transactions includes detailed information on both tenants and tenancies. It includes four years of historic data with a monthly addition of up to 40,000 new records. The data has been rigorously collected by Rent4Sure and Van Mildert. The dataset represents around 24 per cent of all rental transactions, with over 30 per cent in some regions and extends across England and Wales.</p> <p>Line by line data allows for extensive analysis of tenant profile and market trends. The annual change in rents is based on achieved rents. Incomes analysis shows individual tenant incomes against the rent or, in the case of sharers, against their share of the rent. Zonal changes are based on London travelcard zones.</p>
Planning decisions	<p>Planning decisions are based on figures produced by the Ministry of Housing, Communities and Local Government, and published in table P135 here, sourced from General Development Control (District) PS1/PS2 returns.</p>
New build starts and completions	<p>Figures are sourced from administrative data as reported to the Ministry of Housing, Communities and Local Government. Starts and completion statistics for new build dwellings are taken from Table 253a from here.</p>
Public Transport Ridership	<p>All ridership figures are automatically collected by Transport for London for different modes within the network. Periods do not have the same number of days/weekdays, and are not adjusted accordingly. It excludes retrospective adjustments to bus journeys.</p>
International visits	<p>Data is from the International Passenger Survey (IPS), which collects data face to face with passengers passing through ports into and out of the UK. This determines location of stay, length of stay, and spend during stay. The London sample is around 20,000 per annum. More information about the IPS can be found here. More information on recently changes to the survey methodology can be found here.</p>
Attractions monitor	<p>The figures presented here are for the number of unique visits to 63 of London's top attractions: museums, stadia, galleries, monuments and more. Data is collected by the individual attractions, before being sent to and compiled by London and Partners.</p>
Issues index	<p>Ipsos MORI's Issues Index is conducted monthly and provides an overview of the key issues concerning the country. Ipsos MORI interviewed a representative quota sample of 965 adults aged 18+ across Great Britain. The answers are spontaneous responses, and participants are not prompted with any answers. Ipsos MORI's Capibus vehicle was used for this survey. Interviews were conducted face-to-face in-home between 4 and 14 January 2019 at 155 sampling points across Great Britain. Data are weighted to match the profile of the population.</p>

Measure

Explanation

Rough sleeping

Rough sleeping data is from the Combined Homelessness and Information Network (CHAIN) – a multi-agency database recording information about rough sleepers and the wider street population in London. This included both people who have been seen rough sleeping by outreach workers and people who have a 'street lifestyle' such as street drinking or begging – often referred to as 'wider street population'. Many people who have a street lifestyle are also rough sleepers, but a minority are not.

Crime

These figures are for raw administrative crime data as supplied by Metropolitan Police Service and the Mayor's Office for Policing and Crime (MOPAC). Total Notifiable Offences (TNOs) refer to all statutorily notifiable offences, as per Home Office Counting rules. A full list of offences can be found [here](#).

Healthcare

GP referral figures are from administrative data submitted by NHS Trusts and Independent providers treating NHS patients for the Quarterly Activity Return. More information on these statistics can be found [here](#).
The A&E figures refer to administrative data which measures the total number of attendances in the calendar month for all A&E types, including Minor Injury Units and Walk-in Centres, and of these, the number discharged, admitted or transferred within four hours of arrival. More information on this can be found [here](#).
Delayed discharge figures are from the Monthly Situation Report, which collects data on the total delayed days during the month for all patients delayed throughout the month. More information can be found [here](#), and [here](#).

Air pollution

The London Air Quality Network (LAQN) was developed by King's College London in 1993. It comprises over 100 continuous monitoring sites in the majority of London's boroughs. You can see more about the LAQN [here](#).

Local Authority Spending

Spending data is based on individual local authorities filling out the Revenue Account (RA) suite of forms to show all their budgeted transactions related to the general fund revenue account. The figures are then compiled by the Ministry for Housing, Communities & Local Government (MHCLG). Budget and outturn spending data covers the financial year (April-March). Spending per head is calculated using mid-year population estimates provided by the ONS. 2018/19 financial year figures use 2017 mid-year estimates.

