

# The Future of London's Black Cab trade:

Delivering a sustainable  
taxi trade for London



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Daniel Reast

## About the Author

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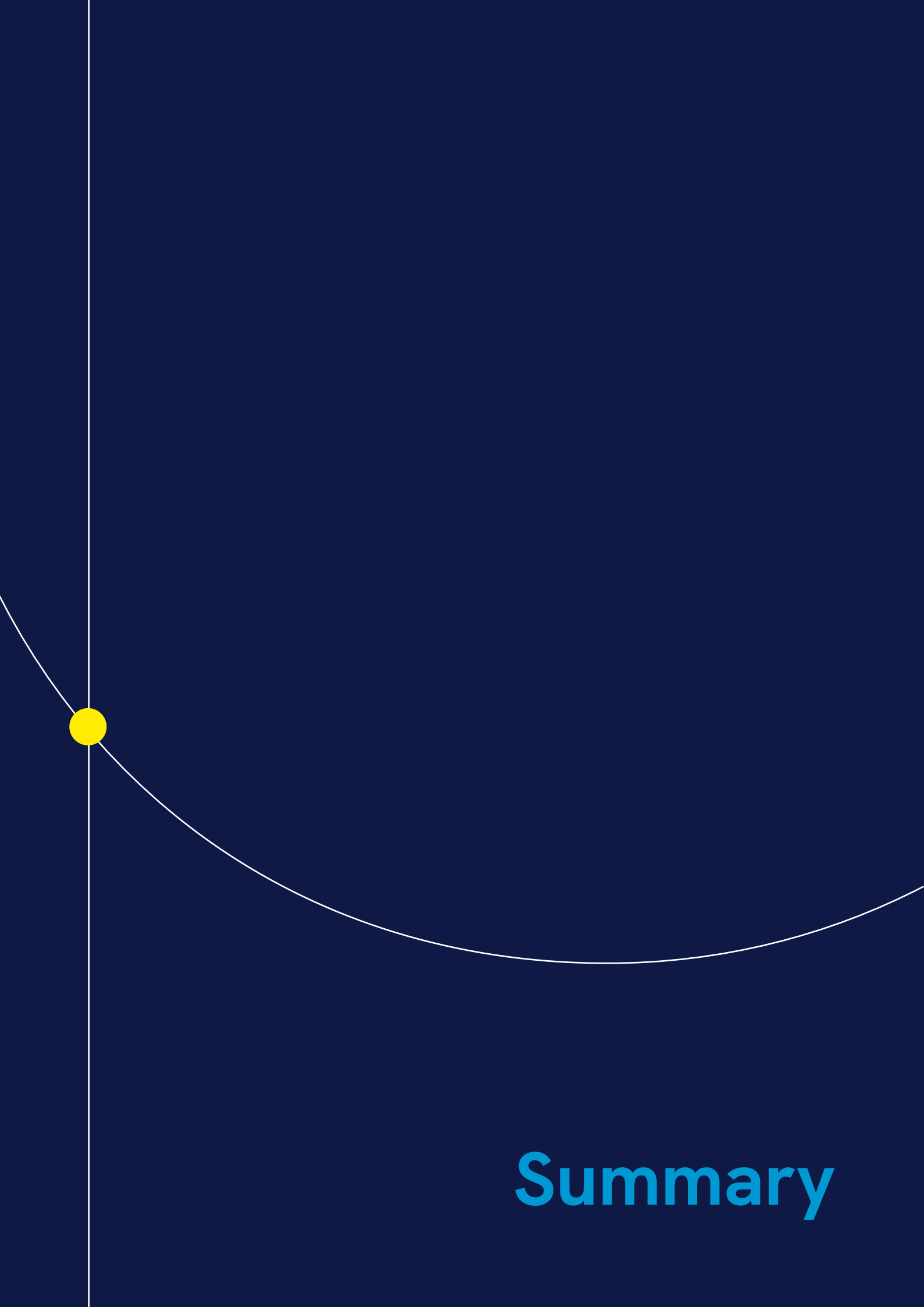
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Nonetheless, the findings, interpretations, and conclusions presented in this report are the result of independent research conducted by the authors. The views expressed are solely those of the authors, and all errors and omissions remain our own.

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**Summary**

The cost of purchasing and operating a taxi in London has increased substantially in the past decade. Government subsidies to support decarbonisation have transformed the sector, but the narrowing of grant funding alongside higher operating costs have damaged the long-term viability of the sector. London's taxi trade will decline further without increased support. On current trends, by 2045 the Black Cab will have vanished from London's roads.

- **The Mayor of London should lobby the Government to introduce a new interest-free loan scheme for drivers purchasing new taxis, matched to the retail price of the LEVC TXE.** Aimed as a replacement of the Mayor's previous and successful Delicensing Scheme, the new loan would mirror the example set by the Scottish Government and should be trialled by London's taxi trade to ease the upfront costs for drivers. This would also accelerate the trade's transition to a ZEC-compliant fleet while attracting new drivers to the trade.
- **The Mayor of London should continue to lobby the Government to extend the VAT exemption afforded to adapted motor vehicles for people with disabilities to London's Black Cabs.** In his capacity as Chair of TfL, the Mayor should continue to make the case to government for extending this VAT exemption, which would reduce upfront costs for taxi drivers as well as encourage improved accessibility standards for the wider taxi sector.
- **The Mayor of London should continue to lobby the Government to extend the Plug-In Taxi Grant further until at least March 2027, while also calling for the Grant to not be reduced in its grant total below £4,000 ahead of that date.** The Mayor should also lobby the Government to explore options for financing the uplift of the grant back to its initial total of £7,500, when possible. The Grant is a vital subsidy for the capital's taxi trade and losing this key discount from the upfront cost of a new vehicle could irrevocably harm the trade's future.

To improve taxi operations, the Mayor of London should demonstrate his commitment to the future of Black Cabs through actions to halt the decline of the city's Black Cab drivers. Clarifying the role of Black Cab journeys in the Mayor's Transport Strategy, creating a data sharing partnership, and setting ambitions for retaining and recruiting drivers will directly contribute to a viable trade.

- **The Mayor of London's new Taxi & Private Hire Action Plan should establish a ten year strategy on the retention and recruitment of taxi drivers, setting out clear ambitions for maintaining and expanding the number of licensed drivers.** This strategy should inform the implementation of current and new regulatory policies to ensure they mitigate the potential loss of taxi drivers to the London taxi trade. This includes the approval of new traffic management schemes. To ensure scrutiny of this strategy, the Mayor of London should instruct TfL to produce an impact report five years into the plan measuring how effective regulatory measures have been at retaining or recruiting new taxi drivers.
- **The Mayor of London should instruct Transport for London to identify a clear role for Black Cab journeys in London, setting out clearly where taxis fit in the 80/20 model of journeys taken by sustainable modes of transport (public transit, walking and cycling) compared to private car journeys.** This should inform a new 'opt-out' strategy for black cab access on London's roads, whereby taxis are defaulted as permitted access to all road networks and bus lanes, and only restricted access after if TfL has found evidence showing the presence of black cabs to cause a safety or operational problem following a set period of time.

- **To improve the regulation, management and operations of taxi services in the capital, Transport for London and trade partners should commit to establishing improved methods for data sharing and travel insights from journeys taken across London.** This cooperative approach to regulation should include the identifying of key business indicators, passenger demand, usage and availability of public EV charging infrastructure, spatial and transport data sets to guide the operations of taxi drivers and TfL. This proactive approach would build on existing data analysis methods employed by private hire operators and public transport, enabling the Mayor to more accurately represent the journeys, workforce and business of taxi drivers in his Transport Strategy, which would therefore improve the overall implementation of regulatory policy.

**As a regulator, the Mayor of London and the Black Cab trade should work in partnership to embed the importance of taxis to the city's future transport system through well-informed regulatory policy. Reforming the Knowledge of London would deliver a lasting improvement to the trade's viability, proving that decline is not inevitable.**

- **The Mayor of London should instruct Transport for London to reform the Knowledge of London examination to be less complex, simpler to study, assess and complete, and to reflect the reality of modern taxi operations.** The course duration should reduce as a result of removing outdated and unnecessary aspects of the Knowledge. As the main stakeholder for the Knowledge, Transport for London should chiefly consult the taxi trade for guidance on the review curriculum and which aspects of the course are relevant for a modernised assessment – both practical and written.
- **The Mayor of London should establish a new Taxi and Private Hire Industry Committee as a liaison body to advise on the implementation of the new Taxi & Private Hire Action Plan.** This group should be established to improve cooperation on the implementation of regulations, the Taxi & Private Hire Action Plan, reforming the Knowledge of London examination, as well as wider issues regarding licensing, operations, availability of public EV charging infrastructure, sustainability, traffic management, recruitment of new drivers, and access.

**Both the Mayor of London and the taxi trade should cooperate on long-lasting, positive engagement to improve regulatory policies and protect a future for London's Black Cabs. It is vital that the Black Cab trade constructively engages with Transport for London on improving regulatory policy, access, recruitment, and reforming the Knowledge of London.**

- **The Black Cab trade should engage with the Mayor of London to deliver a well informed, cooperative and effective recruitment strategy for new Black Cab drivers.** Both the Mayor and the taxi trade are dedicated to the future of the Black Cab in London's transport system. The recruitment of new drivers, as highlighted in Recommendation 4, should be guided by a ten-year strategy which the Black Cab trade should inform directly through close partnership with TfL.
- **Black Cab drivers and industry organisations should commit to working in partnership with Transport for London to share operational, licensing and vehicle data.** As set out in Recommendation 6, the development of a deliberate data partnership would create a range shared resources for both the taxi trade and TfL to allow both partners to identify gaps in the city's transport services, particularly on issues of accessible travel, connectivity and traffic management.

- **The Black Cab trade should work proactively with the Mayor of London to inform smart traffic management policies which increase access for taxis, while enabling improved accessibility of the public realm.** Black Cab drivers are uniquely placed to provide insight into the accessibility of London's public realm. It is incumbent on the trade itself, including taxi drivers, trade associations and operators to engage with TfL proactively and identify where traffic management schemes are performing well or have not improved access or traffic levels. This proactive engagement should also include providing insights into the availability of public EV charging infrastructure, and its access for Black Cab drivers. This should be an essential purpose for the proposed Taxi and Private Hire Industry Committee highlighted in Recommendation 8.
- **The Black Cab trade should be at the heart of the process for reforming The Knowledge of London, working constructively with TfL to promote the taxi trade as a viable career path in a revitalised Knowledge framework.** The trade should work closely with TfL to establish shared resources, information on demographics, joint recruitment programmes and accessible learning initiatives to maximise the number of drivers graduating. As a primary stakeholder, the Black Cab trade should engage proactively with TfL to inform and implement the reform process, identifying any barriers to recruitment for consideration by both the trade and TfL as its regulatory partner.

# Introduction



London's Black Cabs are an iconic symbol of the capital. As a central part of London's transport system, Black Cabs, officially known as Hackney carriages, provide a vital service for Londoners and visitors, delivering convenience, value and accessibility.

Despite their status as a global icon, London's Black Cab trade is facing continued decline due to changes in economic, transport and consumer behaviours.

Taxis were the first transport method to be regulated and licensed by a governing body in England. The first regulation of vehicles fulfilling a similar function originated in 1635 when King Charles I issued a proclamation limiting the number of horse-drawn hackney carriages to 50 in Westminster and the City of London. The first official licences for taxis were granted by the Commissioners of Scotland Yard, a parliamentary improvements commissioner for the public realm, in 1662.

In modern times, the Black Cab gained its globally significant reputation in the 20th century with the introduction of the Austin FX3 in the 1920s, and Austin FX4 in 1958. The FX4 became the motoring icon of London and one of the UK's most iconic vehicles.

This briefing is delivered in partnership with London's largest taxi app FREENOW to outline the latest data and insights into the state of the Black Cab trade in London.

Ahead of Transport for London's (TfL) 2025 update to its Taxi & Private Hire Action Plan, this briefing summarises key evidence and data into the state of the Black Cab trade to enable TfL, the taxi trade and its stakeholders to explore the challenges and opportunities facing the trade. This paper examines multiple aspects of transport policy related to the taxi trade, including transport use, licensing, environmental impact, and economics. To supplement this analysis with qualitative insights on the state of the trade in London today, in January 2025, Centre for London convened a roundtable to explore the issues facing Black Cabs in London with leading industry experts, representatives, operators, manufacturers and policymakers including Deputy Mayor of London for Transport, Seb Dance.

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## A NOTE ON DEFINITIONS

London's world-famous Black Cab trade is one of the capital's icons and a cultural marker which has defined London's transport network throughout history. Black Cabs are licensed and regulated by TfL, which also sets fare prices to be calculated by taximeters in each taxi. Currently, the London Electric Vehicle Company (LEVC) is the only company manufacturing Black Cabs which are licensable by TfL as taxis.<sup>1</sup> These taxis are purpose-built and specially designed to conform to accessibility and sustainability standards. The high standard of accessibility is a key aspect of the modern Black Cab design, providing people with disabilities an invaluable transport option when other London public transport methods may not always be fully accessible or available to them. TfL requires all taxis to be wheelchair accessible as part of its Conditions of Fitness, which have been in place since 2007. This is unlike PHVs which are not required to demonstrate wheelchair accessibility to be licensed to operate on London's roads.

Unlike PHVs, taxis can be hailed on the street or via a taxi rank. TfL does not regulate the fares of PHVs and they are not required to be purpose-built, but must comply with emissions standards. Unlike taxi drivers, PHV drivers are also not required to pass the world-famous Knowledge of London exam to operate on London's roads. For both taxi and PHV drivers, TfL requires enhanced Disclosure and Barring Service (DBS) checks and regular medical checks to ensure fitness to drive.

For the purposes of this report, references to taxis or the taxi trade refer to purpose-built Black Cabs and their drivers.

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<sup>1</sup> TfL previously also licensed the Dynamo Taxi, a converted Nissan eNV200 Evalia MPV which was in production between 2020-22.

# Chapter 1

## Policy Background



Prior to the creation of the Greater London Authority (GLA), regulation of London's taxis was under the jurisdiction of the Metropolitan Police. As part of the Greater London Authority Act 1999, taxi and private hire vehicle regulation was transferred to the Mayor of London under a new regulatory body, the Public Carriage Office. This office held the responsibility for licensing and regulating all taxis and PHVs in London, before its absorption into TfL in 2008. Since then, TfL, as the statutory Licensing Authority, has regulated the taxi and private hire vehicle trade through a Conditions of Fitness standard to which all taxis must conform to operate on London's roads. These include setting standards for vehicle design, models and fittings, as well as environmental standards on emissions and fuel.

From 1 January 2018, under the direction of the Mayor of London Sadiq Khan, TfL enhanced its environmental standards and mandated that TfL would no longer licence any new taxis using diesel. This introduced the Zero Emission Capable (ZEC) standard for new licensing applicants which remains in place to this day.

TfL implements taxi and private hire regulation through the Taxi and Private Hire Office (TPH), which regulates licensing, taxi drivers, proficiency and engagement with wider TfL transport strategy. In addition, TPH also manages the Knowledge of London course, which requires aspiring taxi drivers to demonstrate detailed knowledge of London's routes, landmarks and points of interest, as well as broader aspects of customer service. In 2024, TPH's role was expanded to include regulation of pedicabs following the Pedicabs Act 2024.

As part of its role as Licensing Authority, TfL produces a Taxi & Private Hire Action Plan, a strategic framework which guides licensing, sustainability, manufacturing and driver standards. Following re-election in 2024, the Mayor of London, Sadiq Khan, tasked TfL with reviewing the current Action Plan, which was published in 2016. Work by TfL officials has been underway since mid-2024 and confirmed by the Mayor and TfL for publication in 2025.

## State of the Trade

The Black Cab trade has faced significant change in the past two decades. Enhanced and accelerated regulation, the introduction of new environmental and accessibility standards, and the increased competition from private hire operators has transformed the trade. While the cultural heritage of Black Cabs is undeniable, data analysis of a variety of issues shows a broad decline in the trade.

## Licensing totals and trends

### Trends in Black Cab Vehicle and Driver Licences

The number of taxis licensed by TfL has declined significantly over the last decade. In 2013-14, 22,810 taxis were licensed to operate on London's roads.<sup>1</sup> This fell by more than a third (34.5%) over the ten years to 2023-24, where the total number stood at 14,525.

If this trend continues, there will be no Black Cabs on London's roads by 2045. In contrast, on current trends, the number of licensed PHVs will increase to 172,818 by the same year.

Data on the number of licences issued to new drivers adds further cause for concern. The number of licences issued annually to entirely new drivers joining the trade fell from 1,010 in 2016 to just 104 in 2024.<sup>2</sup> This reflects the challenge facing the wider sector in not just maintaining a working stock, but in attracting new taxi drivers as well.

## State of the trade

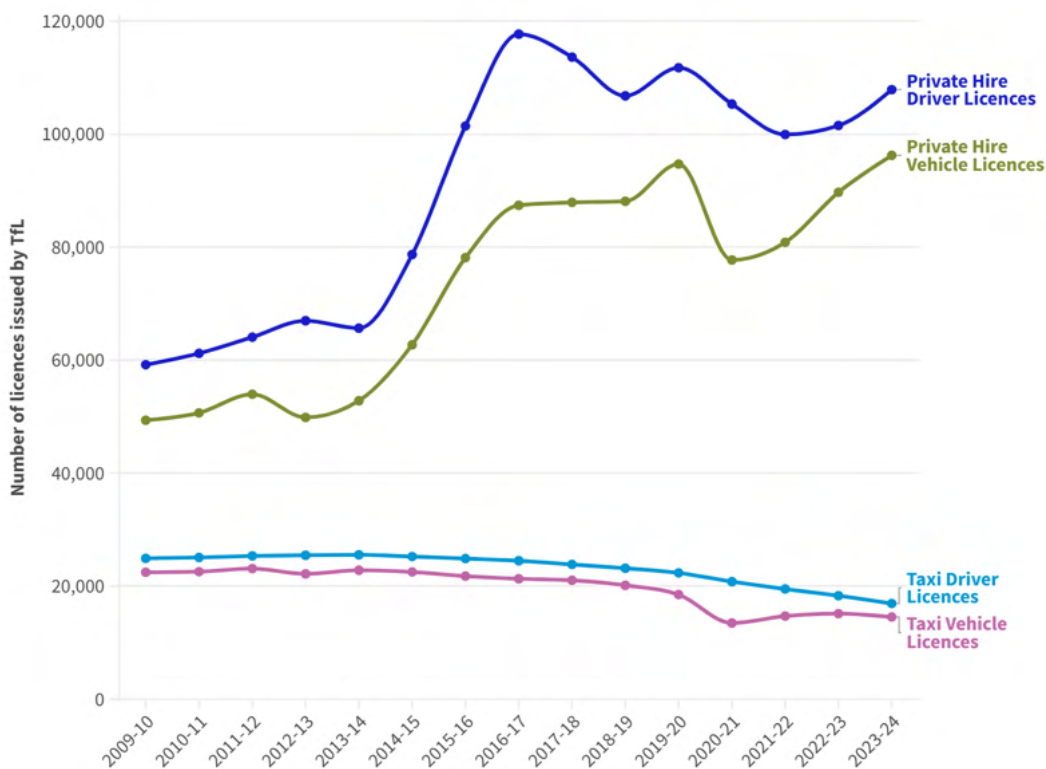
The Black Cab trade has faced significant change in the past two decades. Enhanced and accelerated regulation, the introduction of new environmental and accessibility standards, and the increased competition from private hire operators has transformed the trade. While the cultural heritage of Black Cabs is undeniable, data analysis of a variety of issues shows a broad decline in the trade.

The data also highlights that the decline in the number of Black Cabs on London's roads has accelerated in recent years. Between 2013-14 and 2018-19, the number of taxi vehicle licences issued fell by 9.2% to 20,136. This then accelerated significantly, thanks to the multiple shocks of the Covid-19 pandemic, changes to working patterns in Central London. Between 2018-19 and 2023-24, the number of taxi vehicle licenses dropped by 27.8% - more than a quarter of all Black Cabs on the roads prior to the pandemic. The pandemic was not the sole cause of the accelerated fall in licensed taxis, but it exacerbated a pre-existing trend of decline caused by higher barriers to entry, such as the cost of purchasing and operating a vehicle and a fall in the number of new drivers.

We see similar trends in the number of total licences issued to drivers, falling from 25,538 in 2013-14 to 16,919 in 2023-24, a fall of 33.7%. While the overall decline in driver licenses over the last decade follows the same trajectory as those for vehicles, the trend has been smoother, with less of a marked drop-off since the pandemic. Where the number of taxi licences fell by 20% between 2019-22, this drop was more marginal for the drivers themselves at 12.7%.

## Taxi & Private Hire Vehicle and Driver licensing totals, 2009-24

Figure 1: Taxi & Private Hire Vehicle and Driver licensing totals, 2009-24



Source: Transport for London (2025)

## Trends in Private Hire Vehicles

In contrast, the private hire vehicle industry has grown substantially since 2010. This can be attributed to the rise in digital PHV operators such as Uber, Bolt and Addison Lee. In 2009-10, the number of private hire drivers licensed by TfL was 59,191. By 2023-24, this total had grown by 82% to 107,884.

While the number of PHVs has grown substantially, it is important to note the number of PHV drivers has not grown consistently, having fallen slightly in 2016-17 when it reached a peak of 117,712.

This more variable experience of growth can be attributed to TfL's evolving approach to granting operating licences to private hire operators. In September 2017, TfL refused to grant an operating licence to Uber, citing safety and corporate concerns. The effect of this can be seen in the decline of PHV driver licences between 2016-17 and 2021-22 by 15%, a trend that was likely further exacerbated by the pandemic. However, since 2021-22, the private hire industry has returned to growth, while the number of Black Cabs and drivers has continued to fall.

Initiatives such as FREENOW's Knowledge Subsidy have sought to encourage PHV drivers to become Black Cab drivers through removing the costs for application, licensing and the Knowledge of London assessment. Launched in 2023, more than 700 PHV drivers have been approved to join the programme. TfL has the opportunity to learn from this initiative, working alongside the trade and using its leverage as a regulator to encourage more PHV drivers to qualify as a Black Cab driver.

## Key Takeaways

London's Black Cab trade has declined dramatically over the past decade. Influencing factors such as the increased cost of purchasing and operating a vehicle, as well as the wider exacerbating effects of the Covid-19 pandemic and changes in working patterns have left a lasting impression on the trade, so much so that the number of Black Cabs has not recovered to pre-pandemic trends. Many Black Cabs drivers and their vehicles have left the trade without a significant uptick in newly qualified and licensed drivers. The data does not seem to suggest, however, a lack of demand for door-to-door private car services, with PHV licences growing significantly over the last ten years.





## Costs of operations

### Grants, subsidies and fares

For London's Black Cab drivers, there are two significant public funding streams which have supported the initial costs for buying or renting a new Black Cab which is Zero Emissions Capable (ZEC): the Government's Plug-In Taxi Grant (PiTG), and TfL's Taxi Delicensing Scheme. The PiTG was introduced in 2017 to provide a grant of up to £7,500 for taxi drivers to purchase a ZEC-compliant vehicle. This was reduced to £6,000 in March 2024 before reducing further to £4,000 for a final twelve months from April 2025.

Launching in 2017, TfL's Taxi Delicensing Scheme was a scrappage scheme which offered taxi drivers up to £10,000 (dependent on the vehicle) to scrap older Black Cabs which were not compliant with ZEC standards. The scheme closed in March 2022 by which time it had supported the delicensing of more than 4,000 diesel Black Cabs. Both subsidies have been successful in encouraging changes from diesel to ZEC-compliant taxis.

The closure of the Delicensing Scheme and subsequent reduction to the Plug-In Taxi Grant have limited the subsidy available to Black Cab drivers at the same time as the cost of purchasing and operating taxis has risen. The mandate for ZEC vehicles has remained in place, effectively forcing taxi drivers to transition without the same level of financial support offered to the sector in 2017.

Reintroducing or committing to green subsidies for new taxis, therefore, should be considered a key lifeline for new drivers seeking to purchase and operate a London Black Cab. Looking to models such as the Switched On Taxi Loan scheme, implemented by the Scottish Government, could allow drivers to switch from diesel to battery-powered vehicles through a government-backed interest-free loan of up to £75,000. The Loan Scheme, which closed for new applications in December 2024, is repayable over six years and managed by the Energy Saving Trust. Overall, the Scottish Government has administered £5.5m in loan funding since 2016 and supported the scrappage of more than 700 taxis in Glasgow alone. Where financial barriers have prevented the renewal of licences or repelled prospective drivers from learning to drive a Black Cab, there is a role for government to ensure the trade remains sustainable, providing an essential service for Londoners.

## Operating Costs

Since 2018, the cost of operating a taxi as a self-employed driver on London's streets has grown substantially. TfL's Cost Index reveals a significant increase in the cost of several key components of taxi driver operations. In 2024, total operating costs for taxi drivers is calculated as £35,458 a year. This is a dramatic increase on 2019's figure of £25,047, an increase of around 41% in cash terms in just five years.

This rise has been driven in part by increases in insurance costs. According to the Cost Index, yearly insurance costs in 2019 were £3,589 on average. In 2024, this more than doubled to £8,766.50, an additional 144%. Analysis by EY<sup>3</sup> has shown this significant increase in insurance costs is the result of high inflation in the UK economy, which caused a rapid increase in costs for materials, car parts and labour in 2021-24.

While TfL does not base its approach to fares and tariffs solely on its Cost Index, it provides an evidence base for any changes to its charging regime. Following a consultation in 2024-25, TfL has approved an increase to its minimum fare by 40p to £4.20, which is a rise of 40% since the April 2022 fare increase.<sup>4</sup> TfL has also mandated increases in the costs of Tariffs 1, 2 and 3 by 5.05% for fares charged from April 2025.

## Daily running costs

An industry survey found that 44.7% of taxi drivers who drive ZEC-compliant cabs considered operating costs an important factor when choosing to invest in a new ZEC taxi.<sup>5</sup> For taxi drivers operating diesel cabs, 58.6% considered the cost of renting or buying the vehicle a motivating factor for their continued ownership of a diesel vehicle. The initial costs for renting or buying new ZEC taxis is a considerable barrier to taxi drivers, either to buy vehicles which are new to the market or converting from diesel vehicles to ZEC compliant vehicles. 71.2% of drivers in diesel vehicles stated they would be more willing to switch to a ZEC-compliant cab if it was cheaper to buy or rent.



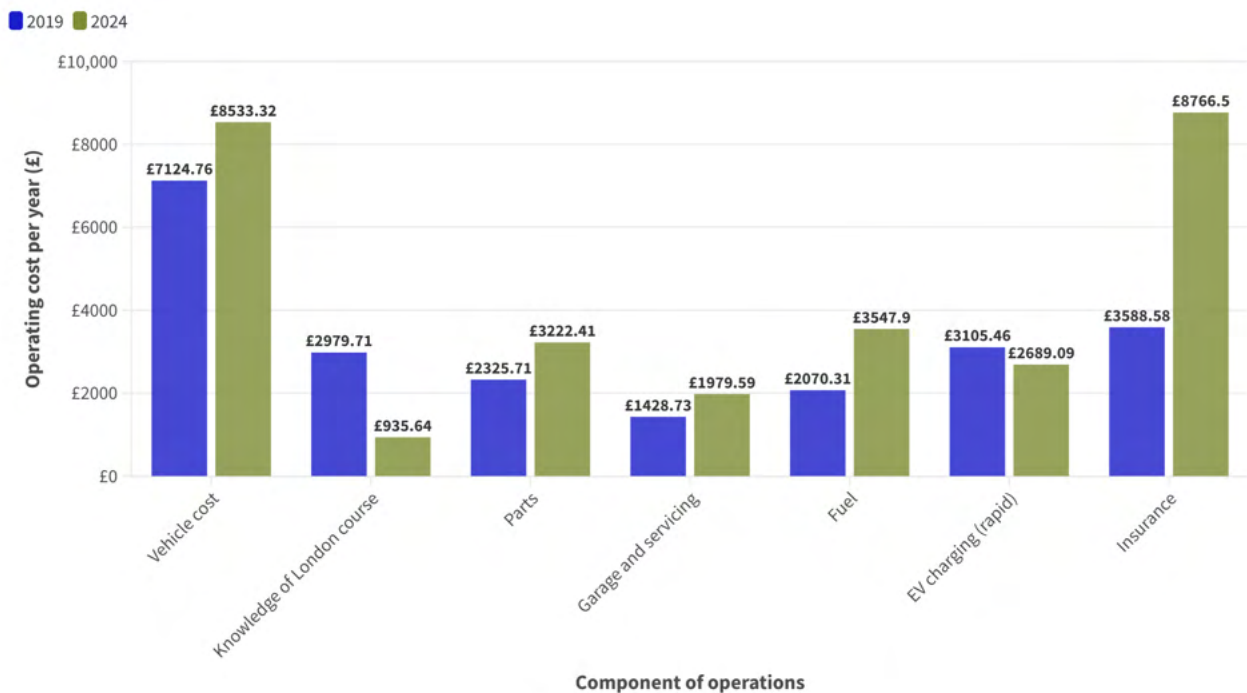
Source: FREENOW

Furthermore, the costs of operating a taxi are heavily affected by the price of fuel. Weekly diesel costs in January 2009 were, on average, 97.5p per litre compared to £1.46 in February 2025<sup>6</sup> - this is an increase in essential running costs of nearly 50% in cash terms for around 5,600 diesel taxis operating in the capital. The expansion in the number of ZEC-compliant taxis which has been brought on through market and regulatory changes has also been affected by cost inflation, where the average price of streetside rapid EV charging has increased on average from 60.96p per kilowatt-hour in September 2022 to 79.1p in November 2024.<sup>7</sup> This has increased the average price of charging an electric car battery from 10% to 80% charge from £31.70 in September 2022 to £41.18 in November 2024.

For new taxi drivers, the initial cost of purchasing and leasing the LEVC TXE has also increased. On its first introduction to London’s roads in 2017, the TXE cost £55,599 outright which could be reduced to £38,099 through the Government’s PiTG worth £7,500 as well as the GLA’s Delicensing Scheme which offered up to £10,000 in 2018. LEVC’s initial finance package for the vehicle collected £177 per week for a five-year term. By October 2023, the cost of LEVC’s most popular vehicle, the TX Vista Comfort Plus, increased to £74,359, or £66,859 including the full PiTG of £7,500.<sup>8</sup> This represents a 39% increase in upfront costs in cash terms. This is compounded by an increase in the rates of interest for drivers leasing or purchasing new Black Cabs through a finance scheme. The further reduction of the Plug-In Taxi Grant to £4,000 for twelve months from April 2025 will increase this cost even further.

## Average costs of taxi operations, 2019-24

Figure 2: Average costs of taxi operations, 2019-24



Source: Transport for London (2025). [Taxi Fares and Tariffs Update](#). Finance Committee Papers, Feb 2025.

## Key Takeaways

Black Cabs have become more expensive to both buy and operate, making taxi driving less viable as a career. These increases in costs correlate with the decline in the number of licensed taxis, suggesting that the increase in operating costs has impacted the trade's viability, while the reduction in grant support has placed a considerable burden on prospective drivers as well as any potential returning drivers. The upfront costs and immediate demands have reduced appeal for a trade which prides itself on self-employment and self-reliance.

## Sustainable taxi operations

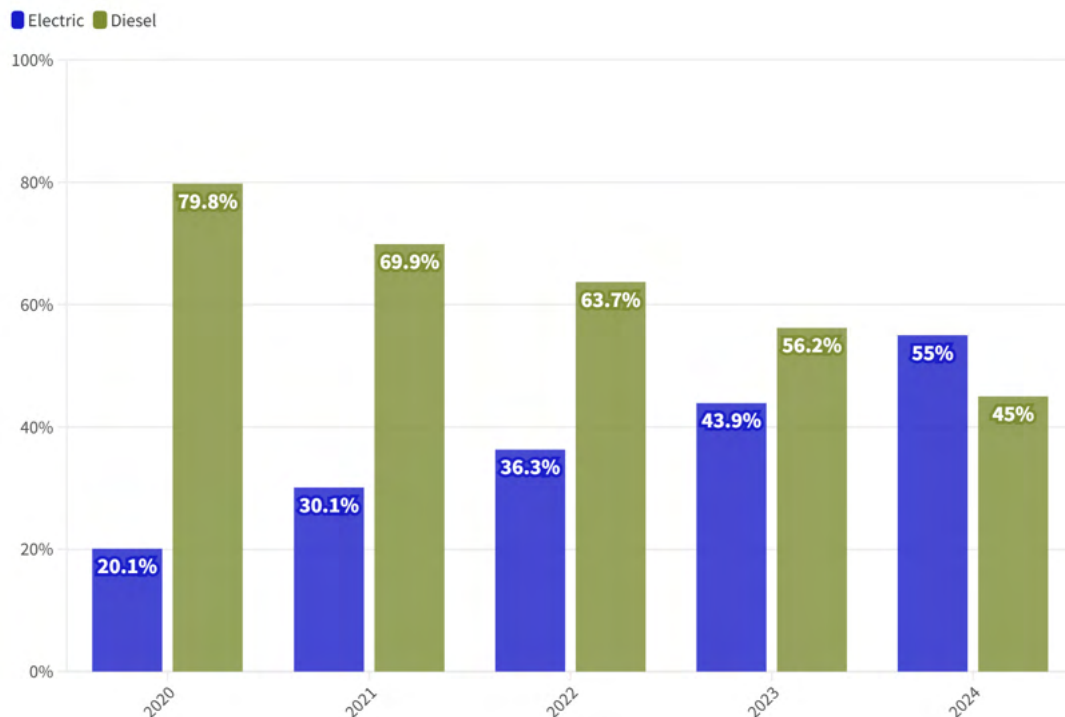
The introduction of the ZEC mandate for Black Cabs in 2018 was a significant moment for both the broader transport sector and London's approach to environmental standards. Since 2018, there has been a dramatic change in the taxi fleet and how it is powered which, while led by self-employed taxi drivers, was incentivised by the Mayor of London, TfL and national government through the Taxi Delicensing Scheme and PiTG.

In 2020, 79.8% of London's taxis were fuelled by diesel. By 2024, this had fallen to 45%, cutting the number of diesel-fuelled taxis on London's roads by nearly half in four years.<sup>9</sup> As of February 2025, the proportion of battery-powered taxis increased even further to 61%.<sup>10</sup>

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## Fuel use of London taxis, proportion of total fleet (2020-24)

Figure 3: Fuel use of London taxis, proportion of total fleet (2020-24)



Source: Department for Transport (2025). [Taxis, private hire vehicles and their drivers](#): Fuel type of taxis, by region: England.

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Despite the requirement for ZEC taxis, access to road EV charging infrastructure has not kept up with demand. London has 30% of the UK's publicly available EV chargers, which is the highest of any region. However, when population size is taken into account, the picture on the availability of EV chargers is less positive. For example, London has 15.1 EV chargers per 100,000 people, less than half that of the county of Staffordshire which has the highest number of EV chargers per 100,000 people at 34.4.<sup>11</sup> This has led to insufficient access to adequate EV charging infrastructure, particularly in residential areas, where London drivers are rated as having the worst access to home-charging facilities of any UK region.<sup>12</sup>

### Key Takeaways

London's Black Cab drivers have responded to new sustainability requirements through a rapid transition to electric vehicle use. Drivers have invested £500m into new Black Cabs to support this decarbonisation and introduce cleaner taxis to London's streets.<sup>13</sup> This is a remarkable shift, especially when considering the Black Cab trade is a self-employed sector and reliant on consumer demand. To capitalise on this transition, policymakers should continue to work to expand the ZEC-enabled Black Cab fleet. Increasing subsidies, expanding public charging infrastructure, and demonstrating the affordability of EV vehicles would help accelerate this transition further.



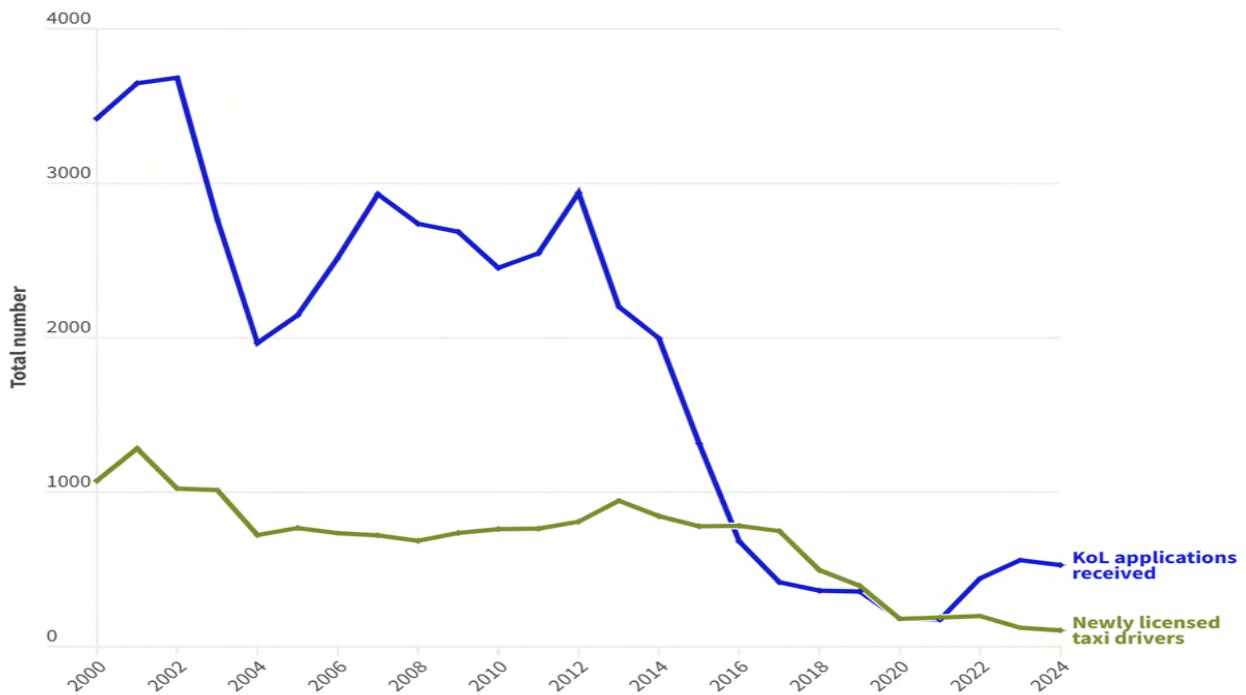
Source: FREENOW

## The Knowledge of London

Widely considered to be the hardest local knowledge test in the world, the Knowledge of London is a qualification which assesses drivers' aptitude for navigating the streets of the capital. The number of Knowledge of London applicants has fallen dramatically in the past 25 years, declining by 84.5% since 2000. TfL states that the average drop-out rate for Knowledge of London applicants is 66%.<sup>14</sup>

### Knowledge of London applicants and number of newly licensed taxi drivers, 2000-24

Figure 4: Knowledge of London applicants and no. of newly licenced taxi drivers 2000-24



Source: Data obtained via Freedom of Information request to Transport for London.

Applicants are required to memorise 320 routes within a six-mile radius of Charing Cross to qualify for the full 'all-London' qualification, or 'green badge', which allows drivers to trade anywhere in the capital. A shorter course and qualification is available for drivers wishing to trade in nine of London's suburbs in Outer London, which earns them a 'yellow badge'. The Knowledge is designed to be challenging and reflects the complex road map and density of the capital. New learners are required to complete the training and examinations in order to be licensed, with the assessment period often taking as long as three or more years to be completed, though the course is not time-restricted. TfL's famous Blue Book acts as the Knowledge's main study guide for learners.

To be fully licensed, taxi drivers must pass the seven stages of the Knowledge assessment including written and oral examinations, one-to-one training appearances, and a suburban assessment. TfL and trade operators such as FREENOW support Knowledge schools, training courses and classes to support aspiring drivers to pass the Knowledge. In contrast, PHV drivers are not required to complete the Knowledge but must complete a standard topographical assessment which examines aptitude for map-reading, wayfaring and directions.



The qualification is recognised as a benefit for passengers who use Black Cabs. A survey from April 2024 found that 41% of Black Cab passengers considered the driver's experience and knowledge of the city a benefit of travelling in a London taxi. This approval increases to 46% for women and 52% for people over the age of 55. However, the expansion of the digitisation of maps and travel information through sat-navs has raised questions of how the Knowledge should adapt to a modern age. Indeed, the same survey found that 61% of taxi drivers in London use sat-navs, while only 15% did not.<sup>15</sup> While the Knowledge remains, and should continue to remain, the gold standard for navigating London's streets, it is clear that the perception of value in driver knowledge risks being lost without a modernised qualification.

Despite PHV drivers having the most transferrable experience and qualifications to transition to driving a Black Cab, the initial licensing requirement of passing the Knowledge of London is considered to be a barrier to entry. An industry survey found that while 52% of PHV drivers had considered becoming a Black Cab driver, 44% of PHV drivers said it took 'too long to become a Black Cab driver', and that 29% would not consider becoming a Black Cab driver because the Knowledge of London exam is 'too hard.'<sup>16</sup>

Half of PHV drivers (49%) who had not stated they had considered becoming a Black Cab driver said they would 'consider' becoming a Black Cab driver if the Knowledge of London was 'made simpler' and reformed, while two fifths would consider it if it 'would take less time to complete' the Knowledge course. For some PHV drivers, the training process itself is a barrier to becoming a Black Cab driver: 24% stated that they would consider becoming a Black Cab driver if there was 'better guidance and support' on the process of training and applying for a licence, while 26% would consider doing so if there was 'more practical training available' for passing the Knowledge examinations. This shows that while the Knowledge of London is comprehensive as a qualification, its scale is clearly off-putting for prospective entrants to the trade.

## Key Takeaways

The decline in the number of Knowledge of London applicants is a signal to policymakers that prospective drivers don't consider it a viable career. Combined with the increased costs of purchasing and operating a taxi, new entrants to the trade are met with significant demands in order to make a living on London's roads. While the Knowledge of London is an iconic and essential qualification for taxi drivers, its continued complexity in an era of satellite navigation apps is a barrier for entry to the trade. TfL should consider reforming this vital examination for a modern era, while ensuring its quality remains the gold standard for taxi licensing.

## Public perceptions

In 2020, a YouGov survey revealed that 62% of Londoners considered Black Cabs to be the most comfortable form of travel in London (second only to the Underground).<sup>17</sup> This compares favourably with PHVs (56%). Furthermore, only 28% of Londoners reported being uncomfortable using Black Cabs as a mode of transport in London, the lowest level of discomfort for all London transport modes.

This survey correlates with the findings of a 2024 survey by FREENOW, carried out ahead of the 2024 London mayoral election, which found that 42% of Londoners cited convenience to be the greatest benefit of travelling in a Black Cab,<sup>18</sup> whilst 41% cited driver experience and knowledge of the city as the next most important benefit. 39% said comfort was a key benefit of travelling in a Black Cab and 36% said they feel safer in Black Cabs compared to other methods of transport.

When considering the cost of fares specifically, TfL's annual customer survey for 2023-24 found 62% of taxi users said fares were 'too expensive' in general, with just over a third (36%) stating fares were 'about right'.<sup>19</sup> However, when considering the broader taxi trade in 2024-25, TfL surveyed respondents and found that nearly half of Londoners (49%) considered Black Cabs to be 'good or very good value for money', while a third (31%) stated they were poor or very poor value for money.<sup>20</sup>

This demonstrates that there is broad public support for Black Cabs as a trade. Survey data from 2024 also shows 66% of Londoners believe that more should be done to support the trade, with only 12% who disagree.<sup>21</sup> There is also a clear trend in public survey data which shows that the public recognises the Black Cab trade is facing challenges from a variety of sources. This includes 64% of Londoners who agree that there should be provisions in place to ensure there is a 'balance' in the type of vehicles available, whether licensed as a taxi or private hire vehicle. Furthermore, 64% of Londoners also agree that Black Cabs are under 'fierce competition' from other services, but that the 'service they offer is much better and that will always be an advantage.' The public also recognises that as a trade with a strong heritage, 56% of Londoners agree that it risks 'becoming outdated and more needs to be done to ensure it survives.'

## Key Takeaways

London's Black Cabs are an essential part of the lifeblood of the capital. A majority of Londoners consider the transport mode to be important for the city's residents, its transport system, and economic development. This support is not just based on current experiences but with a view to the future: 78% of Londoners believe that taxis will still exist in 100 years.<sup>22</sup> There is also appreciation for the benefits of Black Cabs for convenience, accessibility and reliability. This indicates to policymakers that the future of the taxi trade in the capital is not a state of permanent decline but should be supported to thrive and continue its key public service.

## Engagement with the taxi trade

The taxi trade is represented by a broad range of business associations and trade unions which advocate for, and on behalf of, London's Black Cab drivers. In January 2025, Centre for London hosted a roundtable in partnership with FREENOW, hosting the Deputy Mayor of London for Transport, Seb Dance, along with senior officials from TfL. The roundtable was designed as an opportunity for organisations and associations from the taxi trade to engage with policymakers on the challenges facing Black Cab drivers ahead of the publication of TfL's revised Taxi & Private Hire Action Plan. For the purposes of this project, the roundtable was also an opportunity to discuss policy issues which are not reflected adequately in data or statistics.

Members of the trade represented at the roundtable included: FREENOW, the Licensed Taxi Drivers Association, London Electric Vehicle Company (LEVC) and Sherbet. Also in attendance were representatives from the London Assembly, including Chair of the Transport Committee Elly Baker AM, as well as the Clean Cities Campaign.

The roundtable discussion focused on three main areas: financial grants and costs, operations, and drivers. The insights provided have fed into the construction of this report.

## Financial Grants and Costs

The trade has stated the fall in grant funding through the Taxi Delicensing Scheme and PiTG has been a significant cause for the decline in the number of Black Cab drivers and vehicles in London. The loss of grant funding to support the transitioning to a ZEC-compliant fleet of Black Cabs has increased upfront and operating costs for drivers, risking the loss of vital transport services for Londoners. Official statistics on licensing totals reflect this decline, particularly comparing the years before and after the Covid-19 pandemic, where the rate of decline in the number of vehicle and driver licences accelerated. Members of the taxi trade stated that the high upfront and running costs for Black Cabs in London are forcing taxi drivers to make difficult decisions about their career as a taxi driver. The trade has lobbied national and regional governments on the need to extend the PiTG, as well as seeking to apply the existing VAT exemption for wheelchair accessible vehicles to Black Cabs in light of their full accessibility. The trade also raised the impact of wider extraneous pressures on its operations, including the availability and price of electric vehicle (EV) charging at public charge-points and the high interest rates that apply to financing agreements for new Black Cabs.

## Operations

The Mayor of London's 2018 Transport Strategy establishes a vision for 80% of all trips in London to be made by active travel methods or public transport by 2041.<sup>23</sup> Taxis and PHVs are not considered to be methods of public transport and as such TfL does not consider their journeys as part of the vision for 80% active travel and public transport. The taxi trade has requested 'clarity' from TfL and the Mayor of London on where the transport mode sits within the Transport Strategy's definition of public transport, calling for greater recognition of the trade in London's wider transport system.

As a 'first mile, last mile' service, mandated to be wheelchair and disability accessible, as well as adhering to high environmental standards, the taxi trade called on TfL to demonstrate where taxis sit in London's transport system. Survey data from 2024 found that 41% of Londoners use Black Cabs in conjunction with public transport modes to travel in the city, while 40% incorporate Black Cab journeys with walking. This demonstrates that the Black Cab is an essential part of travel in the capital and reinforces the role of public transport in urban mobility.

This issue of definitions has led to continued operational challenges for taxi drivers in accessing core transport infrastructure. This includes certain unclear restrictions on access to routes such as Bishopsgate and at Euston Station, as well as a lack of clear guidance over when taxi drivers can benefit from access to taxi ranks, bus lanes, and through Low Traffic Neighbourhoods and School Streets schemes. It was suggested by representatives of the trade that competing strategic approaches to traffic management, including Vision Zero, has led to confusion over where taxi drivers can travel and ply for trade. As such, the trade has called on TfL to use the opportunity of a renewed Taxi & Private Hire Action Plan to clarify its approach on improving access for taxis and removing barriers where relevant.

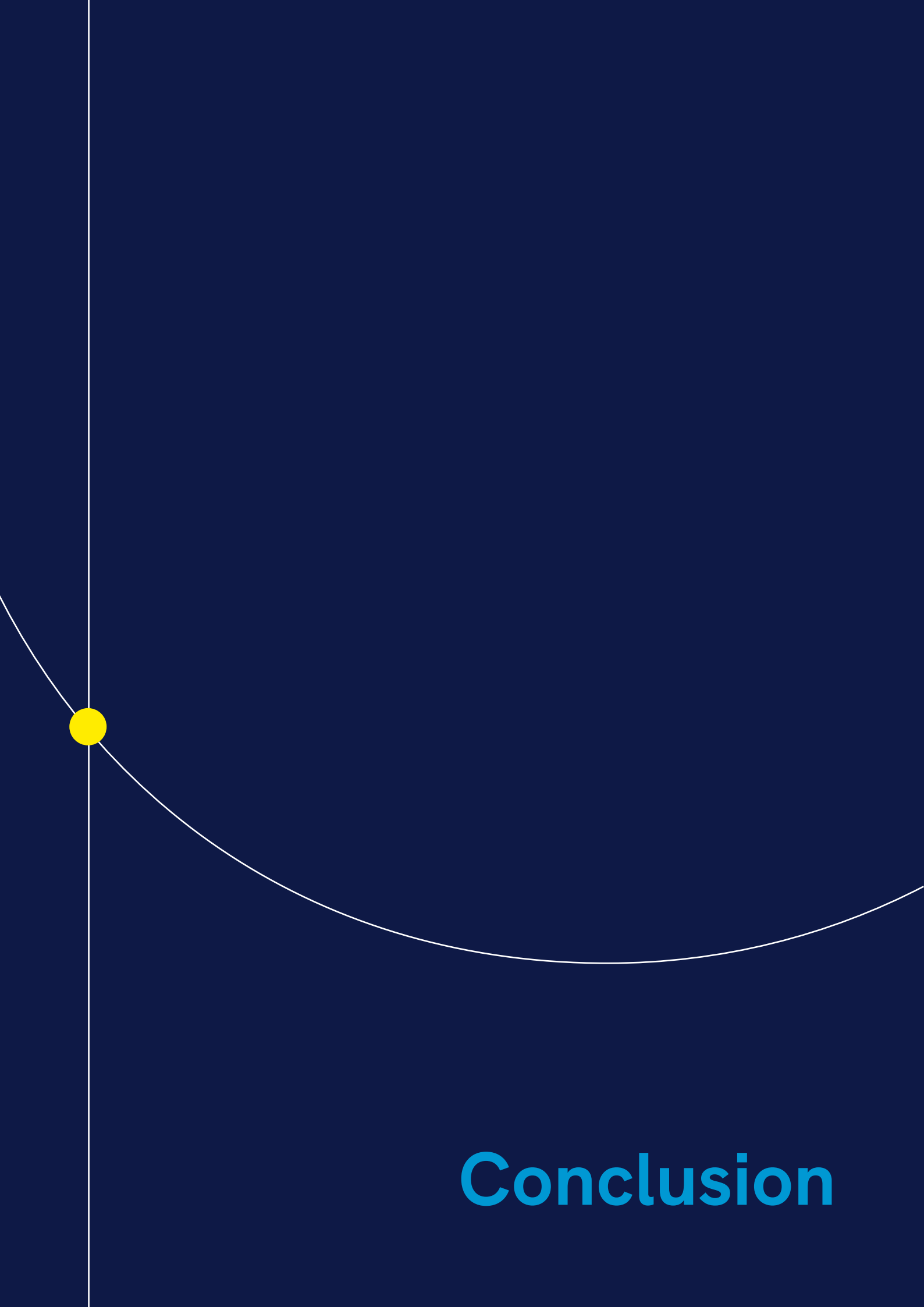
Furthermore, it was raised that it is unclear whether TfL's Congestion Charge for Central London has been as effective at tackling traffic congestion as was intended to be when it was first introduced in 2003. It was discussed that the growth in the number of electric vehicles on London's roads suggested there was a disconnect between the policy intentions of tackling both traffic congestion and poor air quality. It should be noted that licensed taxis are exempt from paying the Congestion Charge, unlike PHVs who must be fully wheelchair-accessible and conform to ZEC standards to qualify for this exemption. The current 100% discount for 'cleaner vehicles', such as fully electric battery-powered and hydrogen fuel cell, is set to terminate in December 2025 but will remain in place for Black Cabs.<sup>24</sup>

To improve operations, regulation of the trade, and understanding consumer trends, it is crucial for transport operators to have a wealth of open access data to design services and respond to periods of peak customer demand. The current system for measuring the baseline of Black Cab activity is through assessing taxi fare activity at Heathrow Airport. This is far from optimal for both TfL and the Black Cab industry to be able to regulate and operate effectively and as such, there is a lack of publicly accessible data on demand for taxi services.

## Drivers

Taxi drivers, as self-employed operators, are regulated by TfL to ensure the level of service for Londoners in using taxis as a mode of transport is safe and affordable. However, the trade is seeking clarity from TfL and the Mayor of London on how the Taxi & Private Hire Action Plan can grow the taxi driver workforce. Foremost among these issues is the future of the Knowledge of London assessment as a qualification for licensing. Representatives from the trade have called for the length and complexity of the assessment to be reformed and streamlined to improve its appeal to aspiring entrants to the trade, particularly younger drivers. Both TfL and the taxi trade have indicated they are supportive of the Knowledge remaining a part of the process for taxi licensing.

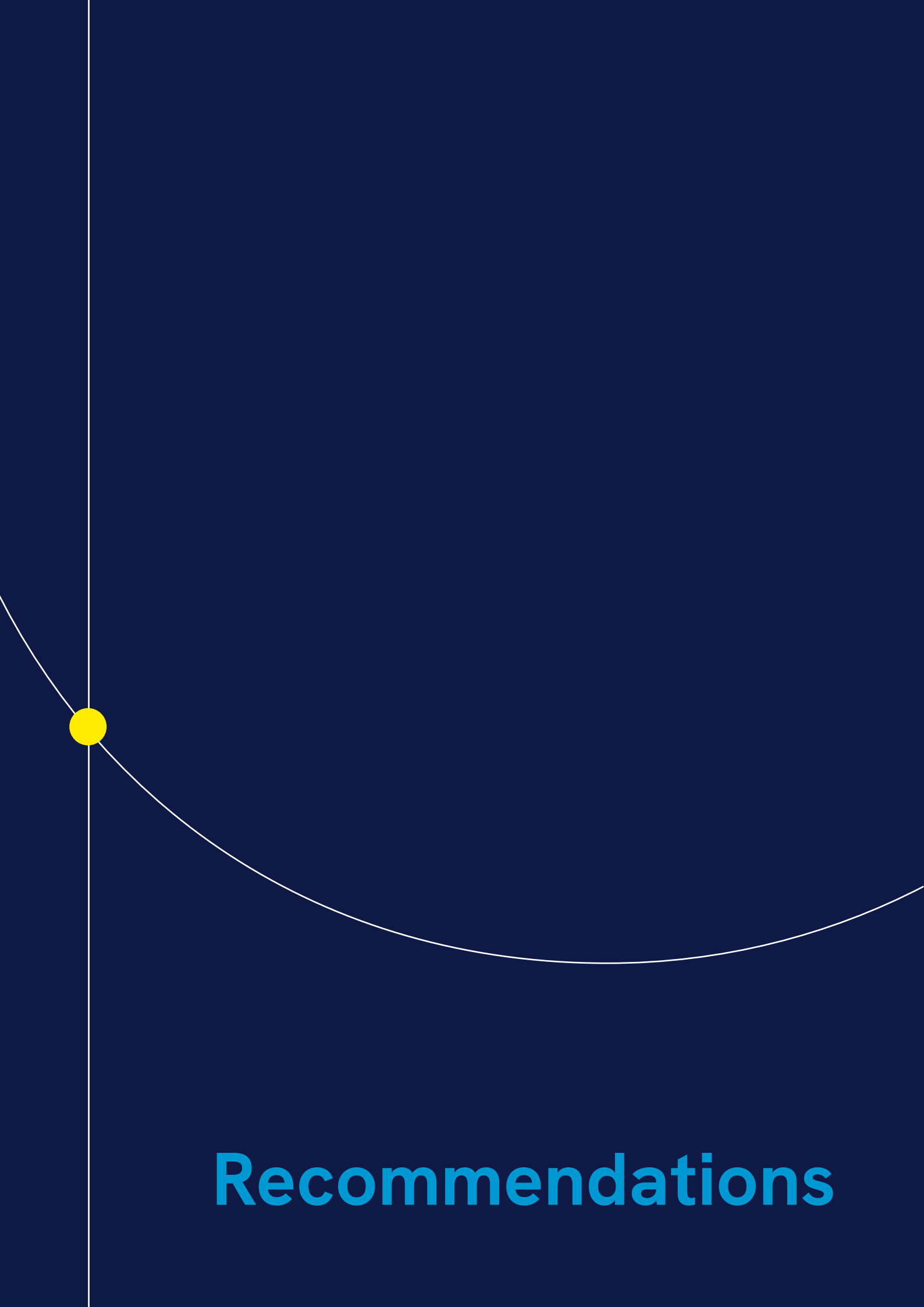
Representatives from the taxi trade have recorded an uptick in the number of fares collected in Outer London, reflecting the continued challenges of congestion in Central London. However, this uptick in activity risks being undercut by the upfront and operating costs of being a taxi driver, as well as a perceived lack of awareness about the opportunities which the trade offers. Therefore, the taxi trade has called on TfL to improve its approach to advertising the taxi trade as a viable sector for investment and as an employment opportunity.



**Conclusion**

The London Black Cab has transported the workers, visitors and residents of the capital for decades. Its viability as a trade and method of transport has been undermined by several economic factors outside of its control, namely, the reduction in grant funding, complexity of the Knowledge of London, as well as broader economic factors such as changes to working patterns in Central London and energy costs. The Covid-19 pandemic exacerbated losses in a declining trade which has remained a vital source of accessible transport to Londoners. The new Taxi & Private Hire Action Plan is an opportunity to renew the investment in the Black Cab trade - not just in extending subsidies and grants, but in supporting the trade as a core part of London's transport system.

- London's Black Cab trade has declined dramatically over the past decade. Exogenous factors such as the Covid-19 pandemic, the cost-of-living crisis and changes in working patterns have left a lasting impression on the trade, with the pandemic accelerating the rate of decline experienced prior to the effects of lockdown.
- Black Cabs have become more expensive to both buy and operate and have become less viable as a career path as a result. These increases in costs correlate with the decline in taxi licensing totals, suggesting that the increase in operating costs has impacted the trade's viability, while the reduction in grant support has placed a considerable burden on prospective and existing drivers, as well as any potential returning drivers.
- London's Black Cab drivers have responded to new sustainability requirements through a rapid transition to ZEC-compliant vehicle use. Drivers have invested £500m into new Black Cabs to support this decarbonisation and introduce cleaner, greener taxis to London's streets. Increasing subsidies, expanding public charging infrastructure, and demonstrating the affordability of EV vehicles would help accelerate this transition further.
- The decline in the number of Knowledge of London applicants is a signal to policymakers that prospective drivers do not consider becoming a Black Cab driver to be viable. Combined with the increased costs of purchasing and operating a taxi, new entrants to the trade are met with significant demands in order to make a living on London's roads.
- London's Black Cabs are part of the lifeblood of the capital. A majority of Londoners consider the transport mode to be important for the city's residents, its transport system, and economic development. This is especially the case for passengers with disabilities where the fully accessible Black Cab is one of the few modes of transport that fully meets their mobility needs. This should indicate to policymakers that the future of the taxi trade in the capital is not in a state of permanent decline but should be supported to thrive and continue the key public service it provides.



**Recommendations**

## Finances

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- ***1. The Mayor of London should lobby the Government to introduce a new interest-free loan scheme for drivers purchasing new taxis, matched to the retail price of the LEVC TXE.***

Aimed as a replacement of the Mayor's previous and successful Delicensing Scheme, the new loan would mirror the example set by the Scottish Government and should be trialled by London's taxi trade to ease the upfront costs for drivers. This would also accelerate the trade's transition to a ZEC-compliant fleet while attracting new drivers to the trade.

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- ***2. The Mayor of London should continue to lobby the Government to extend the Plug-In Taxi Grant further until at least March 2027, while also calling for the Grant to not be reduced in its grant total below £4,000 ahead of that date.***

The Mayor should also lobby the Government to explore options for financing the uplift of the grant back to its initial total of £7,500, when possible. The Grant is a vital subsidy for the capital's taxi trade and losing this key discount from the upfront cost of a new vehicle could irrevocably harm the trade's future.

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- ***3. The Mayor of London should continue to lobby the Government to extend the VAT exemption afforded to adapted motor vehicles for people with disabilities to London's Black Cabs.***

The Mayor has recognised the vital role Black Cabs have in enabling accessible travel for Londoners, while ensuring London is an inclusive city to live and work. Black Cabs fulfil this through meeting mandatory licensing standards for wheelchair and disability accessibility. In his capacity as Chair of TfL, the Mayor should continue to make the case to government for extending this VAT exemption, which would reduce upfront costs for taxi drivers as well as encourage improved accessibility standards for the wider taxi sector.

## Operations

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- ***4. The Mayor of London's new Taxi & Private Hire Action Plan should establish a ten-year strategy on the retention and recruitment of taxi drivers, setting out clear ambitions for maintaining and expanding the number of licensed drivers.***

This strategy should inform the implementation of current and new regulatory policies to ensure they mitigate the potential loss of taxi drivers to the London taxi trade. This includes the approval of new traffic management schemes. To ensure scrutiny of this strategy, the Mayor of London should instruct TfL to produce an impact report five years into the plan measuring how effective regulatory measures have been at retaining or recruiting new taxi drivers.

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● ***5. The Mayor of London should instruct Transport for London to identify a clear role for Black Cab journeys in London, setting out clearly where taxis fit in the 80/20 model of journeys taken by sustainable modes of transport (public transit, walking and cycling) compared to private car journeys.***

This should inform a new 'opt-out' strategy for black cab access on London's roads, whereby taxis are defaulted as permitted access to all road networks and bus lanes, and only restricted access after if TfL has found evidence showing the presence of Black Cabs to cause a safety or operational problem following a set period of time.

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● ***6. To improve the regulation, management and operations of taxi services in the capital, Transport for London and trade partners should commit to establishing improved methods for data sharing and travel insights from journeys taken across London.***

Both the taxi trade and TfL as a regulator are working to improve conditions for the business of taxis on London's roads. This cooperative approach to regulation should include the identifying of key business indicators, passenger demand, usage and availability of public EV charging infrastructure, spatial and transport data sets to guide the operations of taxi drivers and TfL. This proactive approach would build on existing data analysis methods employed by private hire operators and public transport, enabling the Mayor to more accurately represent the journeys, workforce and business of taxi drivers in his Transport Strategy, which would therefore improve the overall implementation of regulatory policy. This approach would also enable the creation of a clearer picture of passenger demand beyond the current, suboptimal metric assessing Black Cab activity at Heathrow Airport, and allow the taxi trade to respond constructively to changes in regulatory policy, traffic management and finances.

## **Regulations**

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● ***7. The Mayor of London should instruct Transport for London to reform the Knowledge of London examination to be less complex, simpler to study, assess and complete, and to reflect the reality of modern taxi operations.***

The course duration should reduce as a result of removing outdated and unnecessary aspects of the Knowledge. As the main stakeholder for the Knowledge, Transport for London should chiefly consult the taxi trade for guidance on the review curriculum and which aspects of the course are relevant for a modernised assessment – both practical and written.

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● ***8. The Mayor of London should establish a new Taxi and Private Hire Industry Committee as a liaison body to advise on the implementation of the new Taxi & Private Hire Action Plan.***

Implementing the new Taxi & Private Hire Action Plan will require coordination, partnership and insight from across the transport policy space. This group should be established to improve cooperation on the implementation of regulations, the Taxi & Private Hire Action Plan, reforming the Knowledge of London examination, as well as wider issues regarding licensing, operations, availability of public EV charging infrastructure, sustainability, traffic management, recruitment of new drivers, and access. This group should be chaired by the Deputy Mayor of London for Transport and coordinated through a core representation of trade representatives, TfL officials, as well as several lay members with specific interests in taxi and private hire policy, road transport, and traffic management.

## **The Black Cab trade**

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● ***9. The Black Cab trade should engage with the Mayor of London to deliver a well-informed, cooperative and effective recruitment strategy for new Black Cab drivers.***

Both the Mayor and the taxi trade are dedicated to the future of the Black Cab in London's transport system. The recruitment of new drivers, as highlighted in Recommendation 4, should be guided by a ten-year strategy which the Black Cab trade should inform directly through close partnership with TfL.

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● ***10. Black Cab drivers and industry organisations should commit to working in partnership with Transport for London to share operational, licensing and vehicle data.***

As set out in Recommendation 6, the development of a deliberate data partnership would create a range shared resources for both the taxi trade and TfL to allow both partners to identify gaps in the city's transport services, particularly on issues of accessible travel, public EV charging infrastructure, connectivity and traffic management.

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● ***11. The Black Cab trade should work proactively with the Mayor of London to inform smart traffic management policies which increase access for taxis, while enabling improved accessibility of the public realm.***

Black Cab drivers are uniquely placed to provide insight into the accessibility of London's public realm. It is incumbent on the trade itself, including taxi drivers, trade associations and operators to engage with TfL proactively and identify where traffic management schemes are performing well or have not improved access or traffic levels. This proactive engagement should also include providing insights into the availability of public EV charging infrastructure, and its access for Black Cab drivers. This should be an essential purpose for the proposed Taxi and Private Hire Industry Committee highlighted in Recommendation 8.

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● ***12. The Black Cab trade should be at the heart of the process for reforming The Knowledge of London, working constructively with the Mayor of London to promote the taxi trade as a viable career path in a revitalised Knowledge framework.***

The trade should work closely with TfL to establish shared resources, information on demographics, joint recruitment programmes and accessible learning initiatives to maximise the number of drivers graduating. As a primary stakeholder, the Black Cab trade should engage proactively with TfL to inform and implement the reform process, identifying any barriers to recruitment for consideration by both the trade and TfL as its regulatory partner.

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