DEVELOPING LONDON

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Unsplash, Colin Meg

Hollowing out London?

Families and Neighbourhood Change in the Capital

Indi Miller

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A prosperous and thriving city, with more Londoners achieving a decent standard of living and participating fully in city life by 2030.

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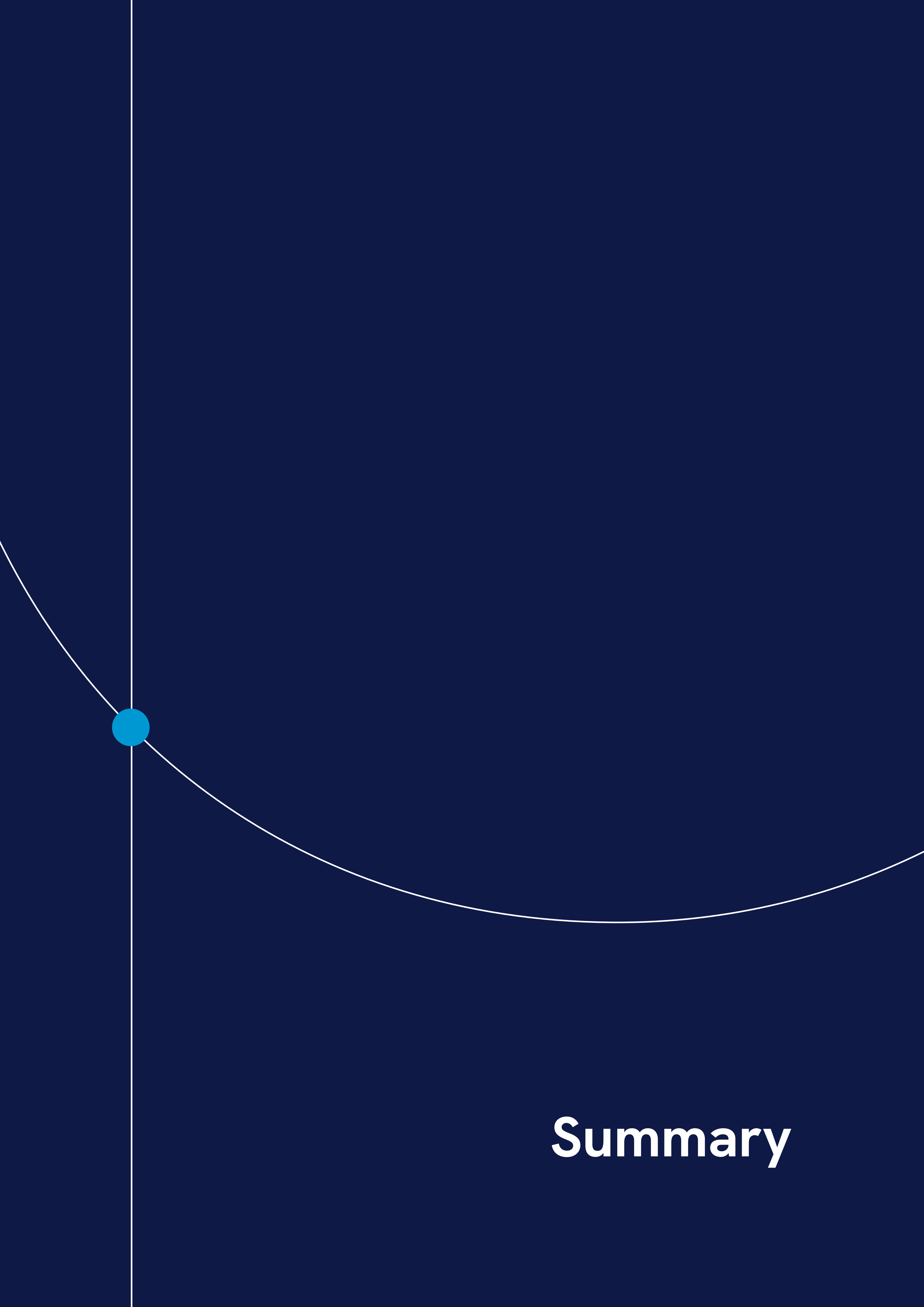


Summary

London is changing. After the decline of the latter half of the twentieth century, the city is bigger, richer and more diverse than ever — but there are winners and losers to the changing nature of the capital.

Regeneration and rising property prices have seen historically poorer neighbourhoods become desirable and affluent, but unaffordable to many of the communities who call them home.

These changes have particularly shaped where families with children can afford to live in London, with declining numbers of families in the inner city matched by significant rises in the numbers of families in the outer boroughs.

These changes in where London's families are able to live have big implications for the experiences of those families, for the city's public services, businesses and communities, and for the future of the capital as a whole.

How have the numbers and experiences of households with children living in London changed over the last two decades?

Despite concerns about London becoming a 'child-free city', there are in fact many more households with dependent children in the city today than there were twenty years ago. In 2001, there were 872,911 households with children in London, making up 29% of all households in the capital. By 2021, this had risen to 1,071,106, an increase of almost a fifth (23%), and making up 31% of all households.

There has, however, been a substantial redistribution of families with children across London. While the absolute number of households with children has risen, most of inner London is seeing numbers of families shrink as a share of the population. Meanwhile outer London has seen large increases in the number of families, where in one borough nearly half of all households now have dependent children.

How have the experiences of London's families with children changed with regard to tenure, socio-economic status and relative deprivation?

These changes in where London's families live has been accompanied by big shifts in how different families in London experience the city. From the kind of housing they live in to the nature of the high streets they use, London's families have increasingly divergent and unequal experiences of life in the capital.

Families with children are much more likely to rent than own their home than 20 years ago, with social renting dominant in the inner city while private renting becoming an increasingly common family tenure city-wide. In inner London, families with children are particularly concentrated in social rented housing which is the dominant tenure with 42% of families with children living in social rented housing. In outer London, home ownership among families with children is more common at 48%, however, the share of households with children in private rented housing has almost doubled since 2001.

London's most deprived neighbourhoods are more likely to have a greater share of families with children, a pattern which has intensified over the last 20 years. Alongside this, neighbourhoods with high shares of households with children also tend to have fewer residents working in the highest Socio-economic Classification occupation.

What has driven changes to the number of families with children in London over the past two decades?

Against a backdrop of overall declines in birth-rates, rising unaffordability is the driving force behind these changes in where families live in London — and housing costs are at the heart of this. House prices relative to average incomes have more than doubled in the past two decades while private rents now absorb almost half of average incomes. These pressures have influenced family formation decisions contributing to falling fertility rates and delayed childbearing. Additionally, some families are being pushed outwards to more affordable areas while others face restricted mobility as they need to live near to family to preserve access to informal childcare that offsets living costs.

What are the implications of the changes where families live in London for public services?

These shifts in where families live in the city and in what numbers are having big impacts on London's public services, with schools in inner London most visibly impacted. The number of pupils has dropped significantly across most of London with declines most acute in inner London. As funding is given on a per-pupil basis, falling rolls are constraining budgets leading to staff cuts, narrowing curriculums, and some case, school closures. Yet schools are facing rising complexity in pupil needs with rising SEND demand and more transient cohorts linked to rising housing instability.

Changes in where families with children live are also creating uneven pressures on maternity services. Falling demand for maternity and neonatal services is making it harder to maintain quality services in parts of London, while growing demand in other boroughs is proving challenging to meet at a time of chronic workforce shortages.

Housing insecurity has become an increasingly common experience for families in London, with rising costs and insufficient social housing pushing tens of thousands of families into homelessness, putting significant pressure on local services. Growing numbers of families are placed in temporary accommodation as they are priced out of other tenures while social housing access is limited. Most families are being placed outside their home borough, exporting service pressures across areas and causing disruptions to children's schooling and these families' social ties, while placing significant financial and logistical pressures on local authorities.

London's rapidly changing and increasingly transient population makes it difficult for local authorities to plan and respond to the needs of families locally. Rising numbers of households in temporary accommodation, alongside rapid changes in inward migration thanks to repeated abrupt changes to national immigration policy, mean local populations can shift rapidly. Yet the data councils rely on to plan services is often lagged or outdated, limiting their ability to maintain an accurate picture of who lives in their area and to plan effectively for current and future community needs.

What are the implications of the changes where families live in London for local high streets and social cohesion?

Over the past 20 years, London's high streets have diverged on two distinct trajectories, polarising London families' everyday environments. High streets in affluent areas have tended towards a more diverse retail mix that supports healthier lifestyles including cafés, gyms, and social clubs. By contrast, high streets in more deprived areas have tended towards a retail mix associated with poorer outcomes for financial and health outcomes including takeaways, betting shops and vape shops. These diverging environments risk reinforcing spatial inequalities between London's different families with children.

Families with children typically strengthen social cohesion but with some areas of London becoming increasingly child-free and others becoming increasingly difficult places to raise children, these effects may weaken. As families with children become increasingly concentrated in poorer neighbourhoods and in temporary accommodation, housing insecurity and frequent moves limit families' ability and incentive to create community ties, undermining neighbourhood stability.

What do these changes in terms of where London's families can live and thrive mean for the city's future?

Left unaddressed, these trends risk deepening inequalities among London's families with children, creating more polarised neighbourhoods and placing further pressure on public services already struggling to keep pace with London's changing population. Understanding these shifts — and crucially, their implications — is therefore essential for planning London's future to ensure the capital becomes a place where families can afford to live, where local economies and communities are strong, and public services are equipped to meet needs across the city.

Introduction

London is changing. After the decline of the latter half of the twentieth century, the city is bigger and richer than ever — but beneath this headline growth sits a shift.

Rising living costs and regeneration have reshaped the capital with a sustained decline in births, a redistribution of families with children across the city, and a reshaping of household structures. These trends are reshaping communities across London by defining who lives, works, and stays in the city.

These shifts have had visible consequences: falling school rolls, high street change, varying levels of social cohesion, and uneven pressures on public services.

For policymakers, attention has primarily focused on the implications for schools: London accounts for nine of the ten local authorities with the fastest drops in primary pupil numbers, creating immediate funding and longer-term financial pressures. Yet the trend is uneven with some outer boroughs growing fast. This has produced a polarisation where inner neighbourhoods increasingly skew toward childless couples and single adults while outer boroughs house a growing share of London's children.

Despite the attention, there is still no comprehensive picture of how household structures, especially families with dependent children, have evolved across the city or what this means beyond schooling for public services such as housing and homelessness, and maternity and neonatal services, local economies, and community cohesion. This project therefore provides an authoritative, pan-London, borough- and neighbourhood level description of how London's families with children, and their neighbourhood experiences, have changed over the last two decades and what that implies for how the city functions.

Methodology

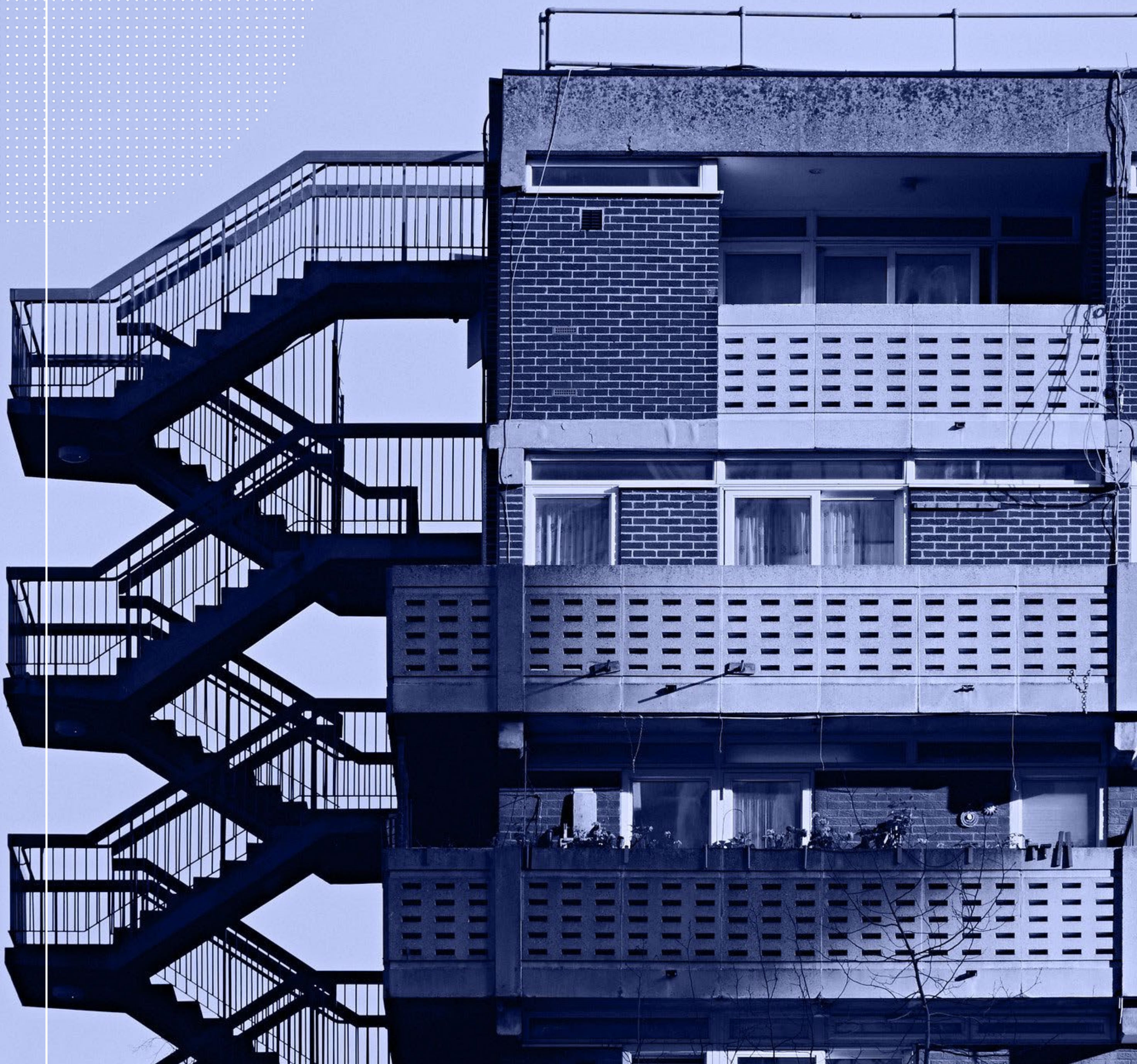
To analyse changes to London's households with dependent children and their characteristics, analysis was conducted using 2001, 2011, and 2021 census data. Additional quantitative analysis was using the English Index of Multiple Deprivation, Survey of Londoners 2021–22, London Civic Strength Index, UK House Price Index, and London Rents Map data based upon the ONS Price Index of Private Rents.

We undertook a review of the literature, examining the drivers of changes to London's households over the past twenty years and the implications of the changes. This included reviewing academic research, policy reports, think tank analysis and other grey literature.

To refine our analysis, we hosted two advisory groups and conducted a series of semi-structured interviews using a purposive sampling approach with headteachers, business improvement district managers, community centre impact officer, academics and council officers. These discussions helped explore the underlying drivers of the changes, the implications across sectors, and how institutions are responding and adapting to current and forecast shifts.

Chapter 1

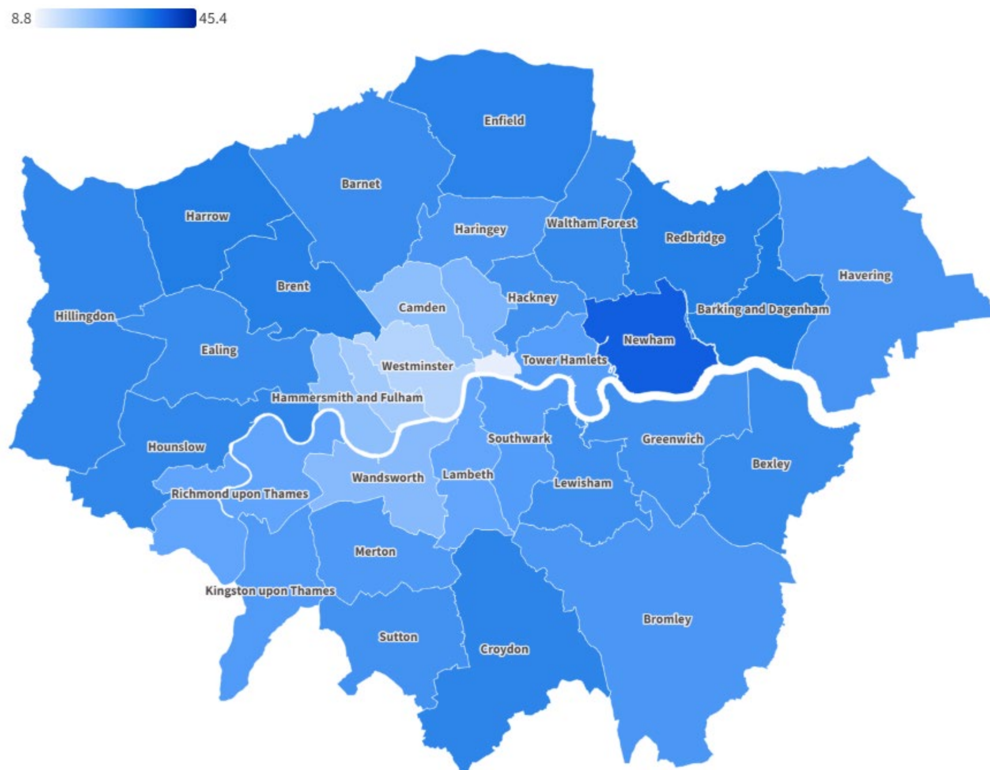
How have the numbers and experiences of households with children living in London changed over the last two decades?



In this section, we analyse census data from 2001, 2011 and 2021 along with data on whether households rent or own their own homes, the relative deprivation of the neighbourhood they live in, and the Socio-Economic Classification, which measures socio-economic position based on the occupation of people working in a household, to map how the characteristics and experiences of London's families with children have evolved over the last twenty years.

Figure 1

Proportion of households with at least one dependent child, 2001



Source: ONS Household Composition, Census 2001, ONS Household Composition, Census 2011, ONS Household Composition, Census 2021

Figure 2

Proportion of households with at least one dependent child, 2011

Source: ONS Household Composition, Census 2001, ONS Household Composition, Census 2011, ONS Household Composition, Census 2021

Figure 3

Proportion of households with at least one dependent child, 2021

Source: ONS Household Composition, Census 2001, ONS Household Composition, Census 2011, ONS Household Composition, Census 2021

How has the number of families with children in London changed since 2001?

There are more households with dependent children in London today than there were twenty years ago, with the number of households with children rising as well as making up a bigger proportion of London's household population.

In 2001, there were 872,911 households with children in London, making up 29% of all households in the capital. By 2021, this had risen to 1,071,106, an increase of almost a fifth (23%), and making up 31% of all households. Much of this increase took place between 2001 and 2011, where the number of households with children rose by 16% and has since slowed.

However, this overall rise in numbers of families with children has been highly uneven across the city. While much of inner London has seen a significant drop in the number of families over the last two decades, almost all of outer London has seen the number and share of families increase.

Much of inner London has seen families with children fall as a share of the population over the last twenty years

Significant population growth in inner London saw the overall number of households with children rise by 55,952, an 18% increase, between 2001 and 2021. However, as a share of the overall population, the number households with children was effectively static, hovering at around a quarter (26%) of households, and many inner boroughs saw households with children decline as a share of the population.

These falls have largely occurred over the last ten years.

Between 2001 and 2011, just four inner London boroughs saw the proportion of households with dependent children fall. In Hackney the figure fell from 300 to 286 households per 1000, in Tower Hamlets from 279 to 266, in Islington from 237 to 224, and in the City of London from 105 to 98. This trend accelerated in the following decade with all but five inner London boroughs — Camden, Kensington and Chelsea, Tower Hamlets, Wandsworth, and Westminster — recording declines by 2021. Lambeth experienced the steepest drop at -12%, leaving 236 households with dependent children per 1000. The City of London held the lowest share overall with just 88 households per 1000 (9%) — the smallest of any local authority in England.

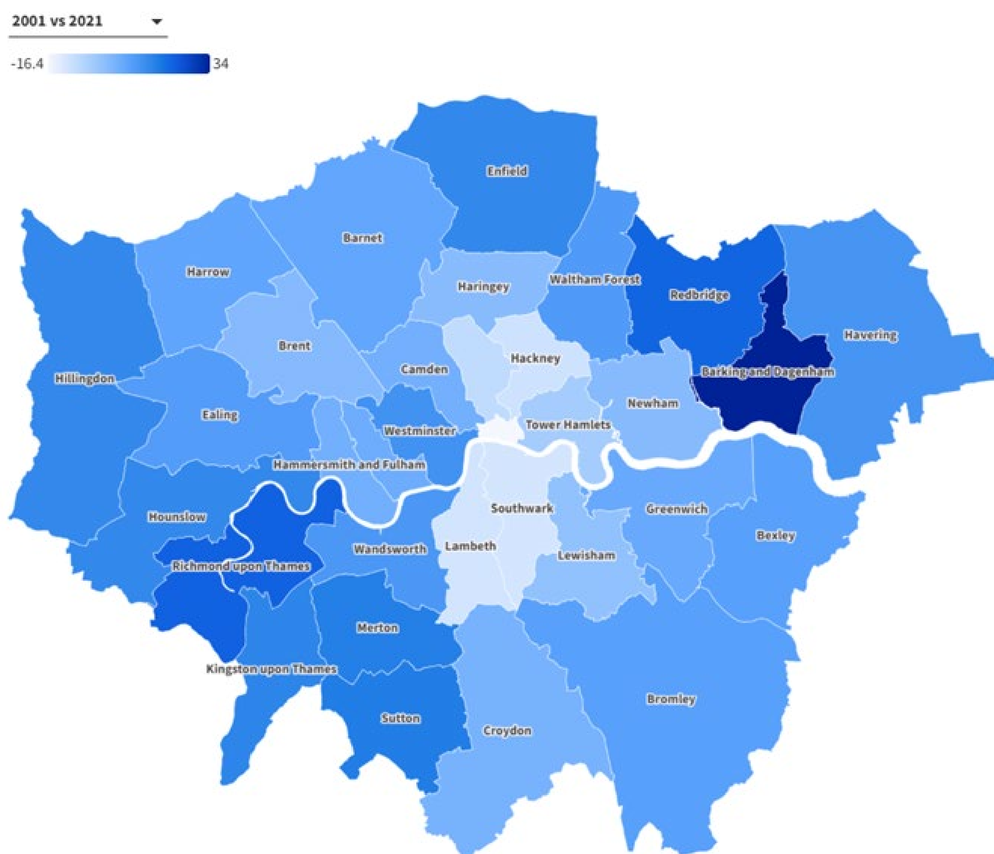
However not all of inner London has experienced this sharp decline, with some inner boroughs now home to a greater number of families as a share of population than the outer London average.

Although Greenwich, Lewisham, and Newham all recorded declines between 2011 and 2021, their respective numbers of families as a share of the household population of 32%, 31% and 38% are close to or above outer London average of 35%. Newham in particular stands out as the London borough with the third highest share of households with dependent children, with the total number of families with children in the borough rising by almost 10,000 between 2001 and 2021, one of the biggest increases in the city.

Outer London tells a different story, with every borough seeing a rise in families with children as a share of households and some seeing very significant increases both in the number of families overall and as a share of the population.

Figure 4

Change in the proportion of households with at least one dependent child, 2001–2021



Source: ONS Census 2001 Household Composition; ONS Census 2021 Household Composition

Between 2001 and 2011, the number of families with dependent children rose in outer London by more than 142,000, an increase of 26%. As a result of this significant overall increase, every outer London borough recorded an increase in the proportion of households with dependent children as a share of the population.

Between 2011 and 2021 Barnet, Brent, Harrow, Croydon and Haringey had experienced declines; however, at around -5% to -1%, these were much more modest than the falls recorded in inner London.

The strongest growth between 2001 and 2021 was seen in Barking and Dagenham, Redbridge, and Richmond. While the biggest overall increase was in Redbridge which added a total of 11,398 families with children between 2001 and 2021, as a share of population, Barking and Dagenham saw its share rise from around a third (34%) in 2001 to almost half (45%), with the result that almost half of households in the borough have at least one dependent child, the highest share in London.

Overall, there have been two big changes to the number of families with children in London and the share they make up of the household population.

The first is that, in absolute terms, there are many more families with children in London than there were twenty years ago. However, this growth has been uneven and, as a share of the overall population, there are now much fewer families in inner London than there were. This has been matched by a significant increase in the number and share of families in the outer Boroughs, with some parts of outer London seeing the number of families with children rise to make-up almost half the population.

As such, rather than a trend towards a 'child-free London', the data shows a substantial redistribution of children across London, with most of inner London seeing numbers of families shrink as a share of the population while outer London has seen large increases in the number of families.

How have the experiences of London's families with children changed with regard to tenure, socio-economic status and relative deprivation?

London's children are much more likely to live in rented accommodation than in owner-occupied housing than twenty years ago.

Across most of London, households with dependent children are more likely to live in social housing than households without dependent children.

As of 2021, in inner London 42% of households with children live in social rented accommodation, while 26% rent privately and 32% are owner-occupiers. In outer London, where ownership is more common across households, this trend is less pronounced with 18% of households living in social rented accommodation, 34% privately renting, and 48% owning the homes they live in.

This disparity is most pronounced in inner London, especially Tower Hamlets where 60% of households with dependent children live in socially rented accommodation compared with 27% of households without dependent children. The City of London also exhibits a stark difference as 35% of its households with dependent children live in socially rented accommodation versus 13% of households without dependent children.

Taken together, these patterns suggest two realities. Families with children are more likely to socially rent because they are prioritised for social housing, but also, they are disproportionately reliant on the social rented sector which acts as a key enabler allowing families to live in inner London.

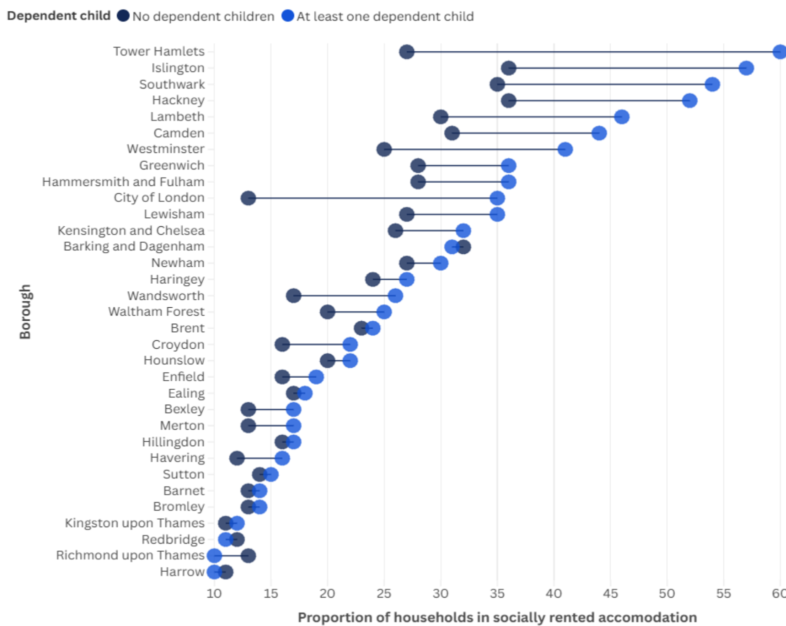
Figure 5

Tenure mix among households with dependent children 2001–2021

Source: ONS Household Tenure, Census 2001, ONS Household Tenure, Census 2011, ONS Household Tenure, Census 2021. 2001 data not available for England

Figure 6

Share of households in social rented housing, by presence of dependent children, 2021 (%)



Source: ONS Census 2021 Tenure Mix; ONS Census 2021 Household Composition

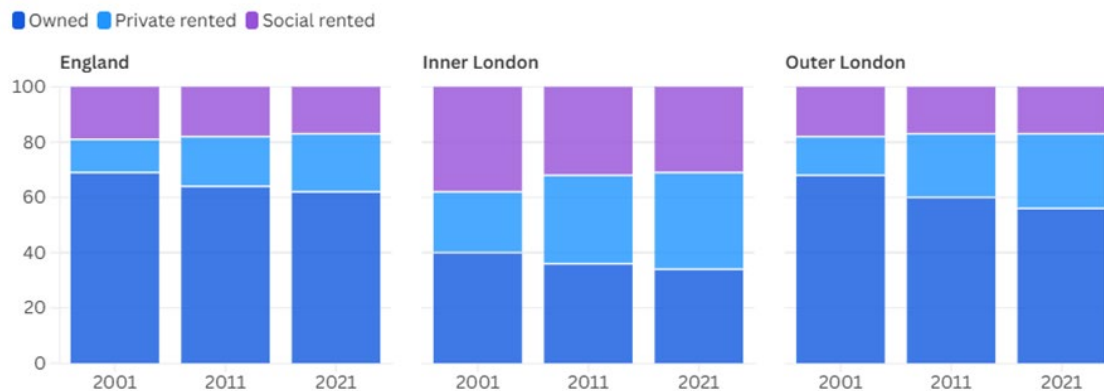
Over time, private renting has also become more common among households with children.

Between 2011 and 2021, the proportion of private family renters grew by 7.7% in outer London and 2.7% in inner London. This coincides with a related fall in family owner-occupiers of 5.6% in outer London while the figure remained stable in inner London.

These changes in the tenures in which London's families with children are living are reflective of broader changes to the tenure mix in the city since 2001.

Figure 7

Household tenure mix 2001–2021



Source: ONS Household Tenure, Census 2001, ONS Household Tenure, Census 2011, ONS Household Tenure, Census 2021

Private renting overall has expanded markedly across London since the early 2000s, with the overall share of households living in privately rented accommodation increasing steadily between 2001, 2011 and 2021. This trend has been more pronounced in inner London than in outer London where the tenure mix more closely mirrors the national profile. However, private renting in outer London almost doubled between 2001 and 2021 — growing from 14% to 27% — signalling that the forces shaping inner London's tenure mix are spreading across the city.

As private renting has grown, the overall proportion of socially rented and owner-occupied households have dropped. Demand for social housing is however at an all-time high. Between 2014 and 2024, London's social housing waiting list increased by 32% — equating to an additional 336,366 people — meaning the capital now accounts for roughly a quarter of England's total waiting list.

While the need for social housing in London has surged, social housing provision has not. Between 2011 and 2021, the number of households in socially rented accommodation increased by 4,966, equating to189,900 more people. However, the social housing stock fell by 26% between 2002 and 2021, from around 528,000 homes to 393,254.

This contrast shows the growing scale of unmet housing need and adds nuance to the declining share of households in socially rented accommodation — the decline is not because people do not need it, but because it is not being provided.

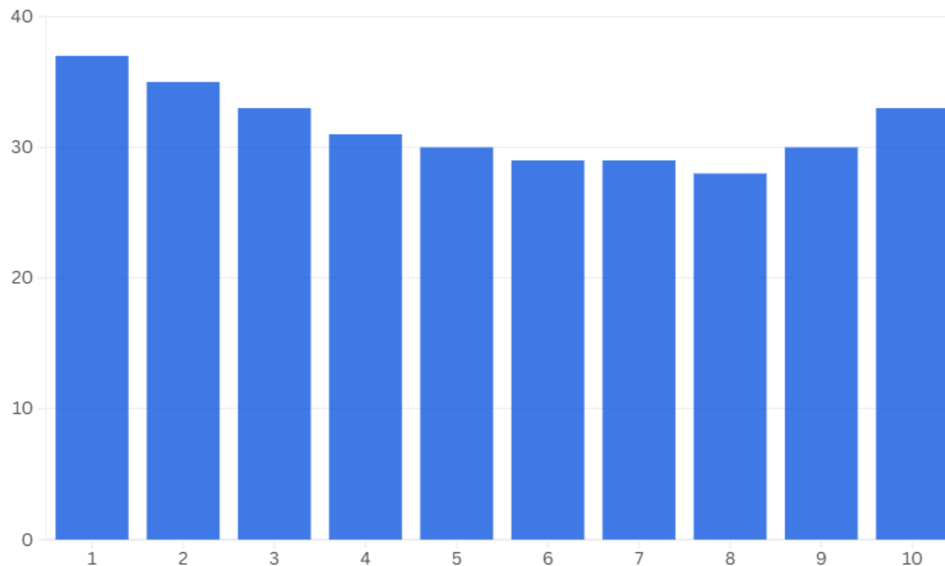
London's most deprived neighbourhoods tend to have a greater share of households with dependent children.

Households both with and without dependent children are more likely to be found in London's more deprived neighbourhoods. In 2021, the largest numbers of both household types were found in the third most deprived decile — 397,860 child-free households lived in neighbourhoods in this decile, compared to 198,383 households with dependent children.

While the overall distribution across deprivation deciles is broadly similar for households with and without children, there are notable differences in the intensity of their concentration within each decile.

Figure 8

Average share of households with dependent children by IMD decile (2021 share and 2025 IMD decile)



Source: English indices of Multiple Deprivation 2025, ONS Census 2021 — Household Composition. Centre for London analysis of LSOA household composition and IMD decile-weighted mean

London's most deprived neighbourhoods have more households with children as a share of their population. In 2021, 31% of London's households had dependent children. In the most deprived LSOAs this rose to 37%. In contrast, households without dependent children are more concentrated in the least deprived areas. Neighbourhoods in the eight least deprived decile have the highest average share of households without dependent children at 72%.

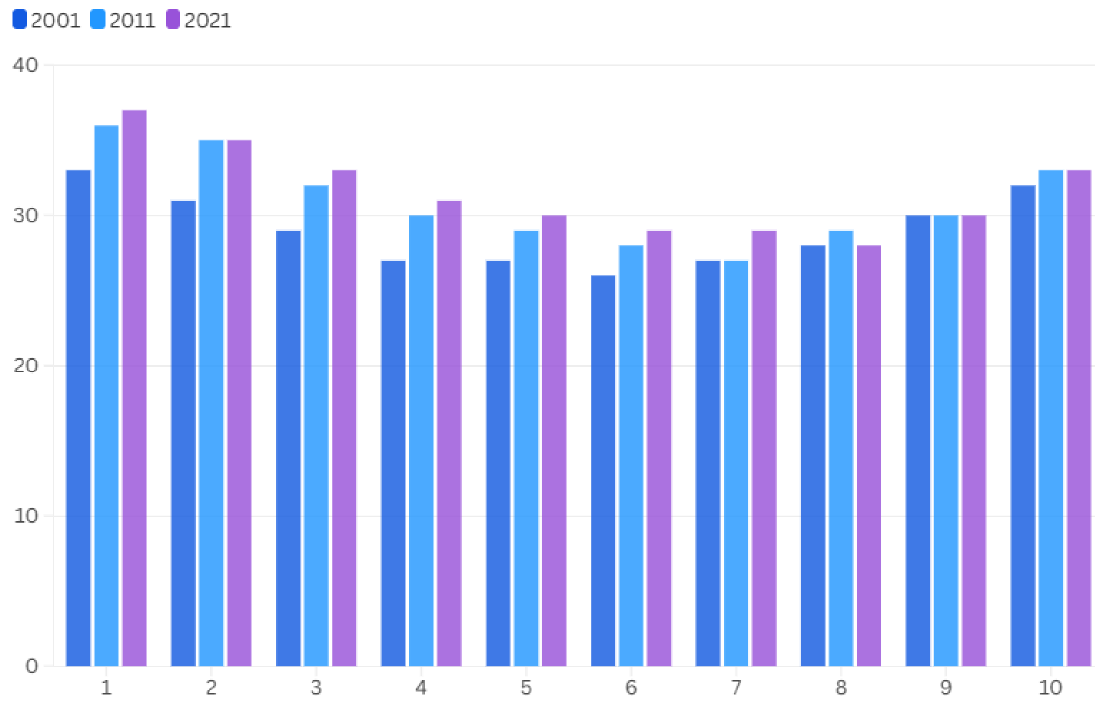
This pattern is most pronounced in inner London where on average 26% of households have dependent children, compared to 35% of households in its most deprived neighbourhoods. In outer London the equivalent is 35% of households on average and 40% in the most deprived neighbourhoods. This suggests that deprivation is associated with higher concentrations of families with children but that the gap is especially wide in inner London.

Families with dependent children have become increasingly concentrated in London's more deprived neighbourhoods over the last twenty years. In 2011 33% of households in the most deprived decile had dependent children, this rose to 36% in 2011, eventually reaching 37% in 2021. This indicates that while these areas account for a relatively small share of London's total family population, families make up a larger share of households within them than elsewhere.

The concentration of families with children in London's more deprived neighbourhoods reflects the displacement of families with children from more expensive areas into more affordable parts of the city, which are more likely to be deprived.

Figure 9

Average share of households with dependent children by IMD decile (2001, 2011, 2021)



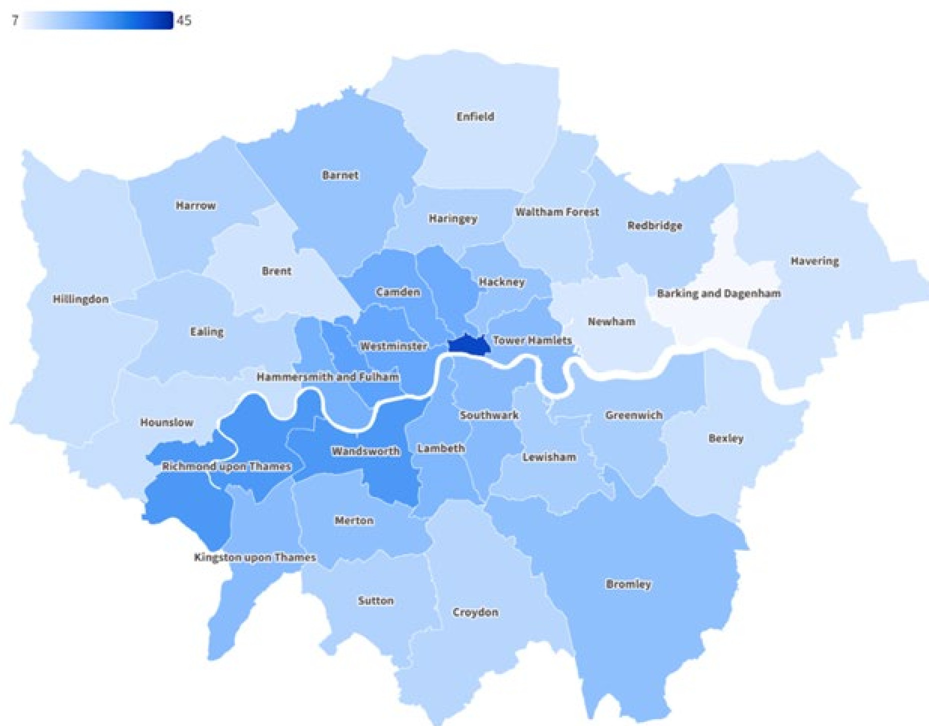
Source: English Indices of Multiple Deprivation 2004, 2015, 2025; ONS Census 2001, 2011, 2021 - Household Composition. Centre for London analysis of LSOA household composition and IMD decile weighted mean

Areas with higher shares of households with children also tend to have fewer residents working in the highest Socio-economic Classification occupations

Barking and Dagenham, Redbridge and Enfield sit at one end of this spectrum with the lowest concentrations of people working in the highest Socio-economic Classification occupations, and are boroughs with some of the highest shares of households with children. The inverse is also visible with City of London, Southwark and Westminster having the highest concentrations of people working in these occupations and the lowest shares of families with children.

Figure 10

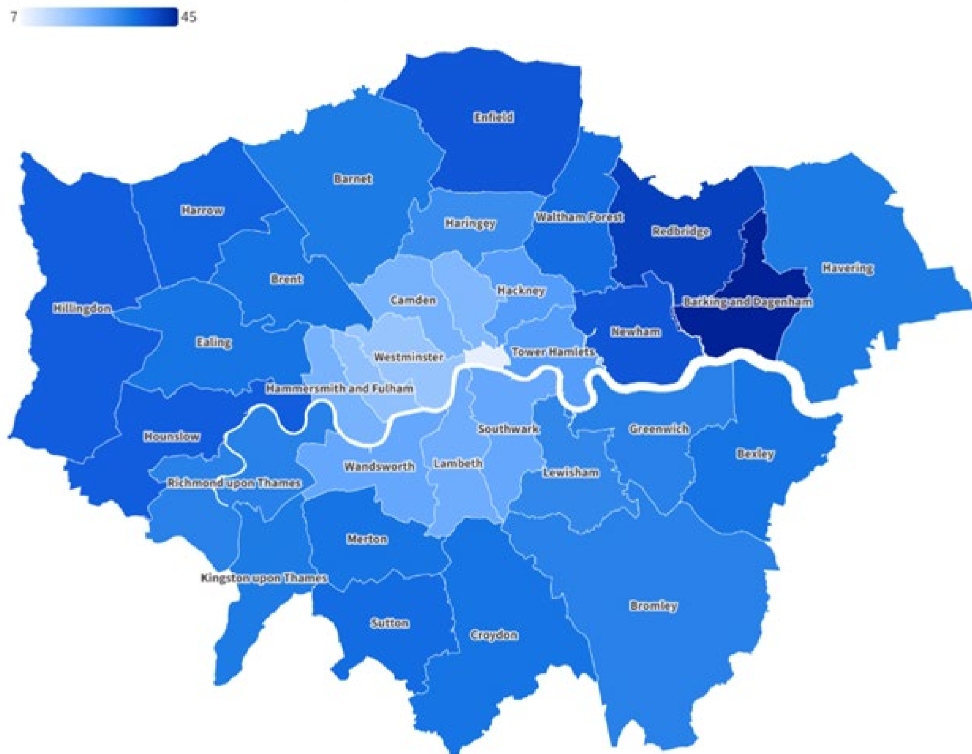
Proportion of household residents in higher managerial, administrative and professional occupations, 2021



Source: ONS Census 2021, NS-SEC

Figure 11

Proportion of household with at least one dependent child, 2021



Source: ONS Census 2021, Household composition

However, the relationship is not linear. Havering and Waltham Forest for example saw some of the largest increases in residents in higher managerial and professional occupations over the past two decades (141% and 170% respectively), while also seeing large increases in the share of families with children (11% and 10%). Moreover, some inner London boroughs with relatively low concentrations of families with children — namely Islington and Hammersmith and Fulham — saw declines in the share of people working in these occupations over the same period.

This demonstrates a broader shift in London's occupational profile. Higher-paid professional employment is no longer firmly concentrated in inner London and areas with lower concentrations of families with children, but is increasingly dispersed across the city.

At the same time as London's family population has expanded and shifted across the city, the experiences of London's families have shifted and, diverged significantly over the last two decades.

London's families with children are much more likely to rent rather than own their own home than twenty years ago. In inner London, families with children are particularly concentrated in social rented housing.

London's families are also more likely to live in the city's most deprived neighbourhoods, a pattern that has been persistent in the city for two decades.

Families with children are also less likely to be working in higher socio-economic classification jobs, such as managerial and professional roles, with parts of London with the lowest numbers of these high socio-economic status jobs also home to the highest numbers of families.

Chapter 2

What has driven changes to the number of families with children in London over the past two decades?

In this section, we explore the various drivers that are causing the shifts seen to the characteristics, distribution and prevalence of London's households with children. The drivers have been categories into three areas: demographic factors, economic factors, and social factors. Demographic factors include falling birth and fertility rates and changing migration patterns. Economic factors include decreasing affordability and London's attractiveness as a place with economic opportunities. Social factors include the desire to live close to family networks and voluntary moves in search for a better quality of life.

Demographic factors

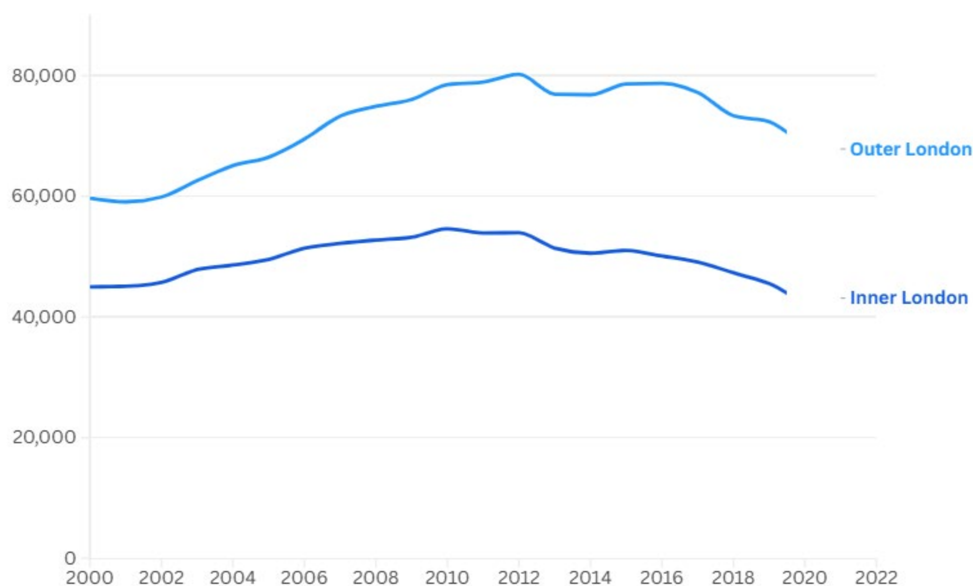
A key reason there are fewer children in London today than there were in 2011 is because fewer children are being born.

In the early 2000's the number of births in London rose, peaking at 134,186 in 2012. However, since then, births have steadily declined.

The number of births in London fell to 110,961 in 2021 despite there not being a reduction in the number of women of child-bearing age. This points to a shift in family formation with some women having fewer children than in previous years and others foregoing having children altogether.

Figure 12

Live births 2000–2022, inner and outer London



Source: ONS London Datastore Birth and Fertility Rates, Borough

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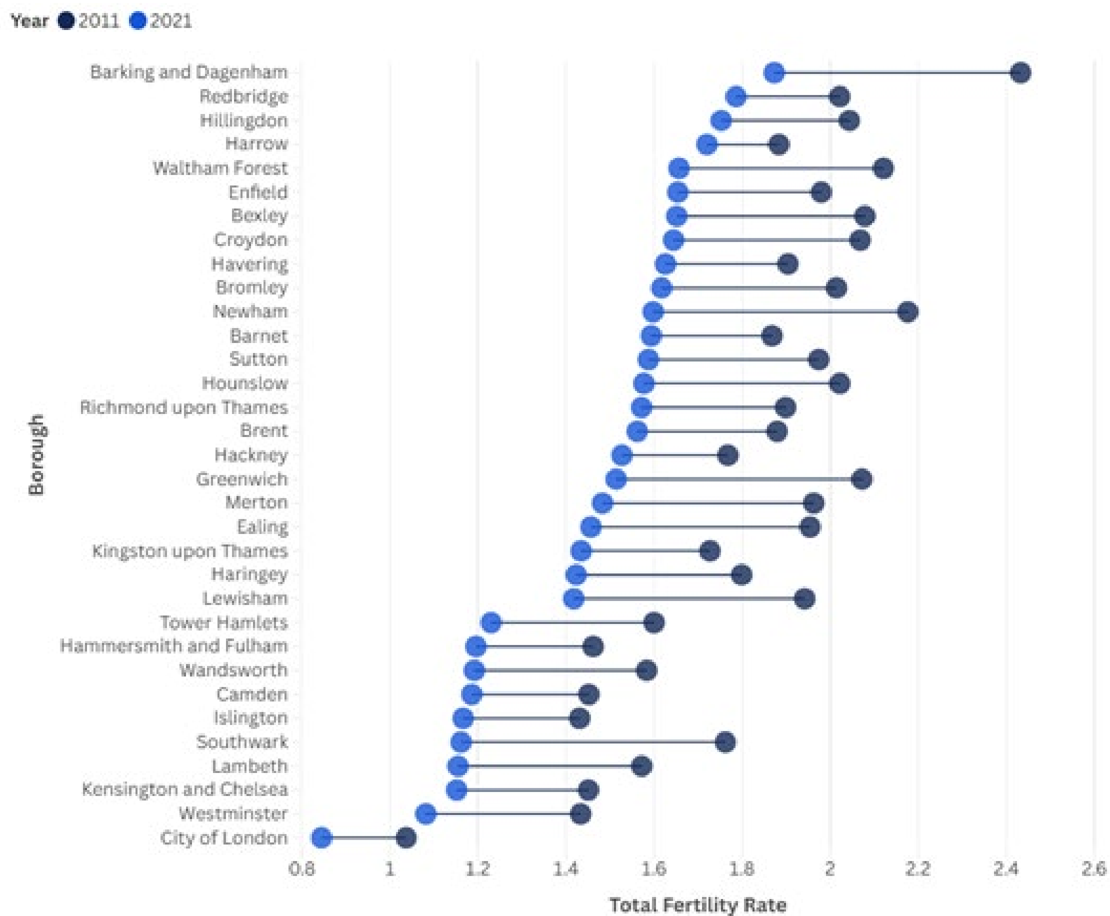
Inner London has seen the most significant change in birth rates. Births fell by over 10,000 between 2011 and 2021 — from 53,908 to 43,120. This corresponds to a fall in the fertility rate over the same period from 1.67 to 1.25, meaning women in inner London were having an average of 1.25 children each by 2021. This is below the replacement rate of 2.1 children per women needed to maintain a population through births alone.

Outer London also saw a drop, though to a lesser extent. Births similarly fell by around 10,000 — from 78,935 in 2011 to 67,841 in 2021, however this corresponds to a softer fall in the fertility rate from 2.00 to 1.62.

Figure 13

Share of households in socially rented housing: families with vs without dependent children



Source: ONS Census 2021, ONS Census 2011, ONS Census 2021

Southwark recorded the largest drop in its fertility rate between 2011 and 2021 — a fall which is mirrored in the sharp drop in the borough's share of families. City of London had the lowest overall fertility rate at just 0.85 in 2021. Conversely, Barking and Dagenham had the highest rate at 1.87 and is the only borough which saw fertility rates rise over the decade.

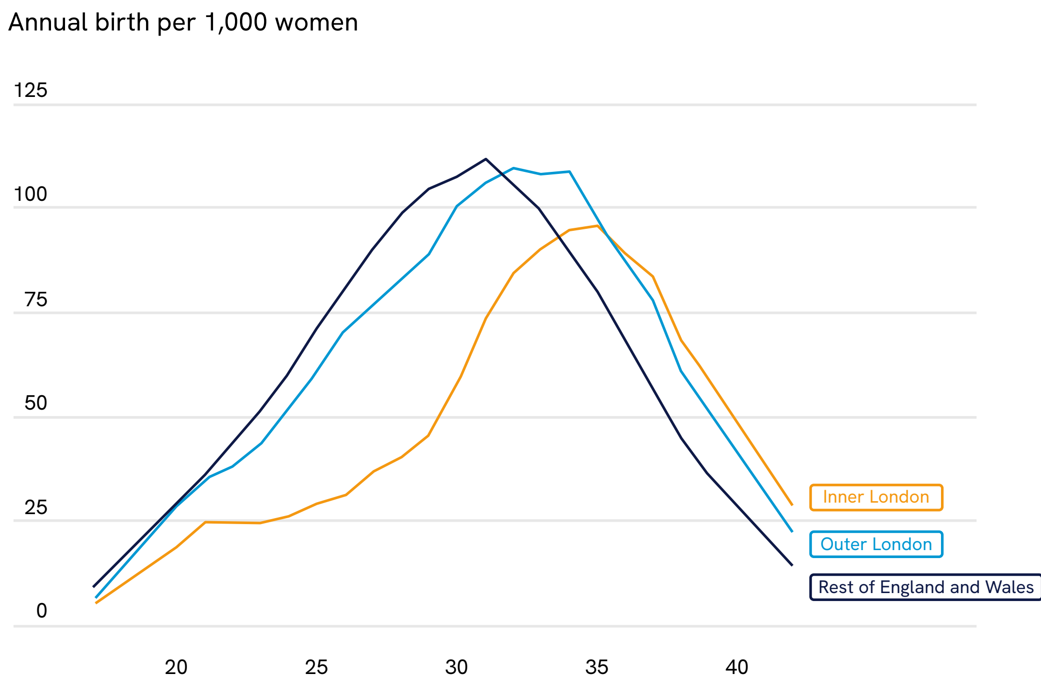
With fertility rates falling across London, no London borough now meets the "replacement rate" of 2.1 children per women[1].

It is important to note however that even at its peak in 2010, London's fertility rate was 1.87 — notably below the "replacement rate" of 2.1, which is the rate of births needed for the population to not grow or shrink. This highlights the core role migration takes in maintaining London's population size.

Among the women who are still having children in London, many are choosing to do so later in life. The average age of mothers in London is 32.5 years[2] — the highest of any English region and above the English average of 31 years.

Figure 14

ASFRs in inner and outer London, and the rest of England and Wales, 2021 Annual births per 1,000 women



Source: Reproduced from Greater London Authority, London's population of young children – current and future

This is especially true in inner London where women are more likely to have children in their last 30s and 40s compared to both outer London and the rest of England and Wales.

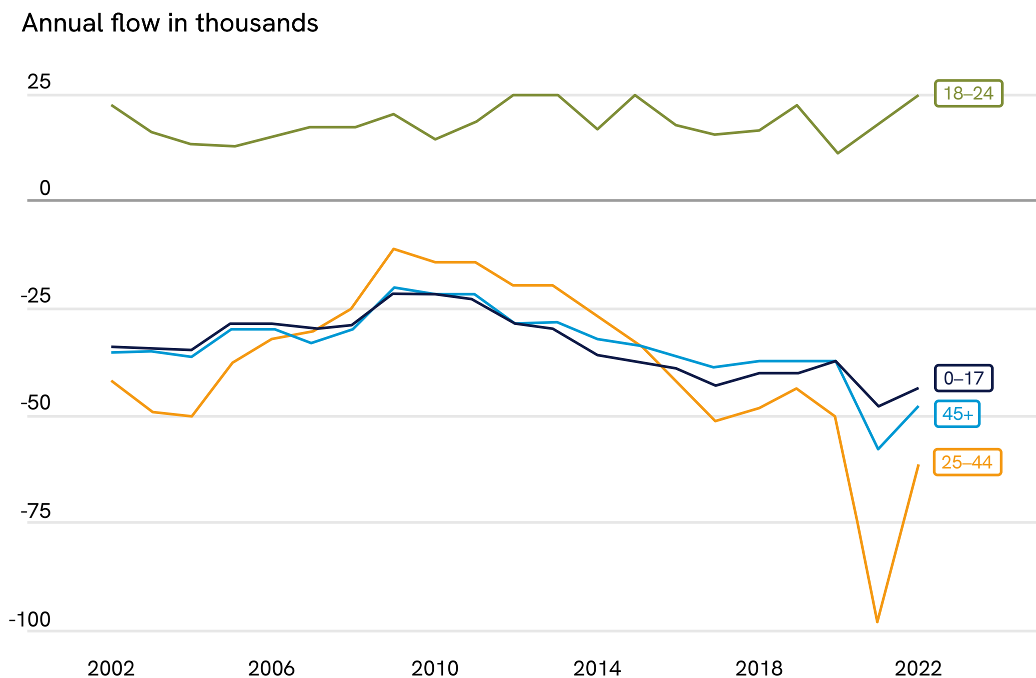
The immediate implication of delays in family formation is that fewer births are happening now, causing a short-term fall in the number of children that, when compounded with more people choosing not to have children at all, leads to a more sustained and deeply entrenched decline.

Against this background fall in the number of children being born in London, migration flows are key to understanding the changes in number and distribution of families with children in the capital

Over the past two decades, inner London has seen a sustained outflow of children aged 0–10 to both outer London, at around 7,000 per year, and to the rest of the UK at around 10,000 per year. At the same time, there has been a significant increase in net domestic outflows of adults aged 25–44 since 2008. Some of these people will already be parents while others may go on to have children, meaning their departure reduces the pool of current and future parents.

Figure 15

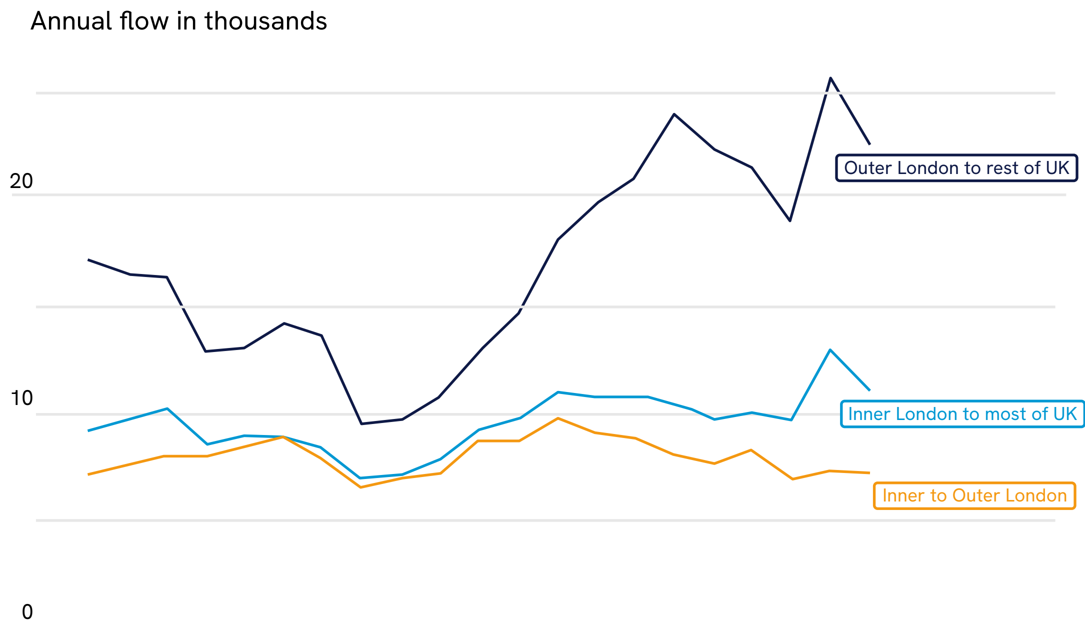
London's net domestic migration flows by age group, from year ending June 2002 to year ending June 2022



Source: Reproduced from Greater London Authority, London's population of young children – current and future

Figure 16

London's net domestic migration flows by flow path, among children aged 0–10, from year ending June 2002 to year ending June 2022



Source: Reproduced from Greater London Authority, London's population of young children – current and future

The relationship between international migration and the number and distribution of families with dependent children in London is more complex than for domestic migration, and policy changes have played a key role in trends.

In 2011, changes were made to the tier 4 student immigration route, preventing undergraduate students from bringing their dependents, unless they are government-sponsored. This contributed to a pattern of inward migration of individuals over family units. In 2012, a minimum income requirement for partner visas was introduced. While the exact number of people prevented from coming to the UK due to the minimum requirement is not known, the figure is estimated to be in the tens of thousands[3]. Individually these changes have not significantly affected the number of families with children, but taken together and compounded over time, they have resulted in fewer families with children settling in London than might otherwise have been the case.

Since the Brexit referendum in 2016, net EU migration has fallen sharply, reducing a large inflow of London's working-age population. As working-age households are more likely to have children[4], this reduction is likely to have contributed to the fall in families with children. By 2022 net migration from the EU turned negative meaning more EU nationals were leaving the UK than arriving. This has been partially offset by a rise in non-EU migration. This is particularly noteworthy for London as non-EU migrants are more likely to live in London than elsewhere in the UK: almost 37% of the UK's non-EU migrant population lives in London compared to 28% of its EU migrant population[5].

With fewer children being born on average than anywhere else in England, declines in fertility rates are a fundamental and long-term driver of the changes we have seen in London's family population.

These have occurred at the same time as significant shifts in patterns of both domestic and international migration. Increases in the numbers of children and adults of child-bearing age leaving the capital for elsewhere in the country have coincided with shifts in the types of households moving into London where immigration policy changes have seen a greater number of single households, rather than families with children, arrive in the city.

Economic factors

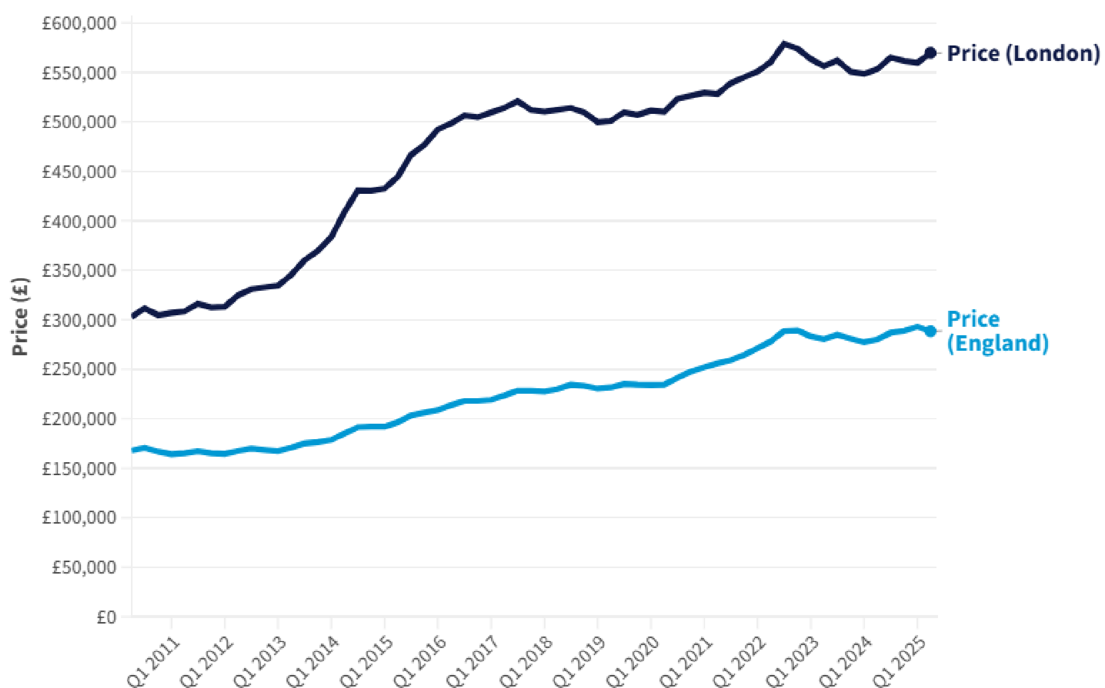
Increasingly constrained affordability is a defining force shaping London's household structures — and housing costs are central to this.

The capital's high rents and house prices increasingly influence where households can afford to live in the city, what tenure they can access, whether they can afford to have families and, in some cases, whether they remain in the city at all.

London is the most expensive of any region in England to buy or rent a home.

Figure 17

House price change, London & England, 2010–25



Source: Land Registry, UK House Price Index 2010–25

House prices have become significantly less affordable over time. In Q2 2025, the average property price in London was £564,987 — 98% higher than the English average. This rises to £659,945 in inner London. By 2021 the average London home cost 14.06 times median earnings, up from 9.65 in 2011, and 7 in 2002[6]. This means the relative cost of buying a home more than doubled in two decades.

Private renting has also become increasingly unaffordable. As of January 2026, average rents were £2,253 per month — 58% higher than the English average of £1,423[7], and private rents rose by 31% between 2009/10 and 2022/23. The pressure of this rise is reflected in London's private rental affordability ratio which stood at 41.6% in 2024[8] meaning the average London renter is spending close to half their income on rent alone. This places London far above the 30% affordability threshold that every other English region, bar the South West, is below[9].

Private renting affordability pressures are particularly significant for families who require larger homes that are typically more expensive. Monthly average private rents for a 1-bedroom property in London range from £1,212 to £2592[10]. This shoots up to £1,820–£4,004 for 3-bedroom property and £2,438–£5,594 for a property with 4 or more bedrooms[11]. Affordability pressures are also more significant in certain areas. For example in Kensington and Chelsea private renters spend an average of 74.3% of their income on rent[12], making it the least affordable local authority in England.

Social renting shows a different picture, with rents decreasing since 2015/16 and remaining below their 2013/14 levels[13]. However, access to social housing has become increasingly constrained. Changes to social housing stock including the introduction of the right-to-buy policy in 1980, which allows local authority tenants to buy their homes at a discount, have contributed to a drastic reduction in social housing stock, particularly in inner London. This has meant that while social rent is the most affordable tenure, fewer households are able to access it.

Shifts in London's housing affordability are key to the changes in tenure mix outlined in Chapter 1, with big implications for the experiences of London's families.

Traditionally, homeownership was seen as a precursor to family formation as it was seen as providing greater stability and often [14]. Rising property prices have however pushed up deposit costs, while surging rents and general living costs have limited households' ability to save. The result is a reduction in family owner-occupiers and rise in private renting. At the same time, demand for social housing has grown as more families are priced out of both home ownership and private renting. With social housing demand outpacing provision however, the share of families in socially rented accommodation has shrunk.

Housing cost pressures have also redistributed families across the capital. Some households have relocated to areas with cheaper rents or house prices, whether in outer London or out of London altogether[15]. This in part explains why areas of outer London with more affordable housing have recorded a growth in families with children while more expensive parts of inner London have recorded declines.

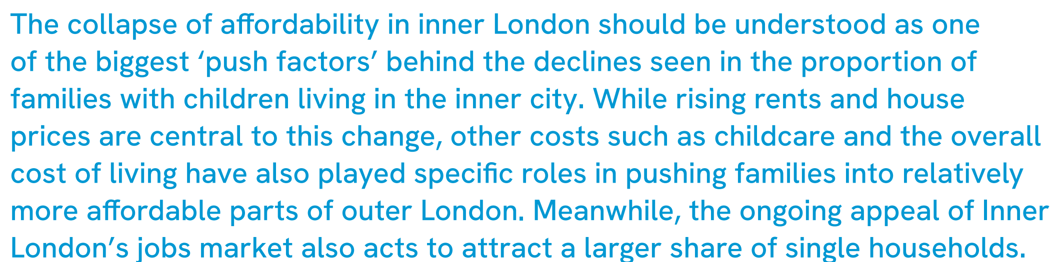
However, relocation is not an option for all families. Moving often requires large upfront investment including deposits, moving costs as well as considerable time spent arranging the move. This limits the ability of some households to respond to rising prices and is a factor in increasing rates of family homelessness in the capital. For low-income households in particular, movement is more likely to be reactive than planned, driven by rent increases and evictions as they are less able to absorb growing housing costs.

A further consequence of these affordability pressures is high after-housing-cost poverty. London has the highest rates of poverty of any English region once housing costs are accounted for. This meant that as of 2023/24 one in every four Londoners lives in relative poverty after housing costs[16]. Renters are especially exposed with 50% of social renters living in poverty and 36% of private renters compared to 12% of owner-occupiers[17].

Beyond high housing costs, London has the highest childcare costs in the country. In 2024, the average cost of 50 hours per week at a nursery for a child under two (with entitlements) was £319.24 in inner London and £274.48 in outer London[18]. For some, this means having children in London is not financially viable. Family formation decisions have also been impacted by affordability pressures with some people delaying childbearing, reducing the number of children they have, or not having children at all.

While economic pressures have pushed many families with children out of inner London, economic opportunities have pulled in students and early-career professionals. This is seen in the consistent positive net inflow of 18–24-year-olds to London over the past two decades — the only age group with positive inflows[19].

At the same time however, improvements in public transport infrastructure and the rise of remote and hybrid working have made living in close proximity to jobs less necessary. This is reflected in growing outward migration to London's commuter belt, as some retain jobs in the city while living outside of it, sacrificing longer commutes for greater affordability[20].



The collapse of affordability in inner London should be understood as one of the biggest 'push factors' behind the declines seen in the proportion of families with children living in the inner city. While rising rents and house prices are central to this change, other costs such as childcare and the overall cost of living have also played specific roles in pushing families into relatively more affordable parts of outer London. Meanwhile, the ongoing appeal of Inner London's jobs market also acts to attract a larger share of single households.

Social Factors

Proximity to family and community ties often influences where households with children look to live in London.

Many parents chose to live close to family members as they provide emotional support and crucially, informal childcare.

Almost half of parents (44%) of children aged 0–4 in England used some form of informal childcare with a grandparent living outside the households being the most common form at 33%[21]. This support helps to offset high childcare and living costs and is particularly important in London where parents are more likely to work longer hours and have longer commutes, increasing the number of hours they require childcare compared with parents in other regions[22].

However, reliance on kin support can also constrain mobility.

When informal childcare is central to managing living costs, parents may be less able to take up jobs further away or move to areas that fit their wider preferences. This is because an increase in wages or quality of life may be outweighed by higher childcare costs if family support becomes less accessible[23].

Neighbourhoods with established family networks therefore tend to retain households with children over time, leading to the concentration of children in pockets of London.

Conversely, in areas with fewer family networks, family formation can be suppressed as people have less ability to depend on family to reduce childcare costs — a challenge especially relevant in the capital as Londoners are less likely to live near to relatives than those in other regions.

A desire to live close to family also shapes tenure and helps explain the rise in family renting.

A 2024 survey[24] found that almost a third (29%) of UK parents of children under 13 who received childcare support from their children's grandparents would like to buy a house but cannot afford one in the area where the grandparents live. As a result, they rent — reflecting the affordability trade-off many parents are faced with between housing costs, childcare costs and the area that best fits their wider needs.

While proximity to family has constrained household mobility for some, the varied offers of London's boroughs have encouraged others to move.

Outer London's offer of larger homes, greater access to green and outdoor spaces, and neighbourhoods that are perceived as safer, quieter and better suited to raising children, help to explain the growing number of families with children there[25]. By contrast, inner London's housing stock is dominated by flats, and newer supply has largely consisted of high-rise developments[26], making it harder to find a family-sized home either at an affordable price, or at all. For families who can afford to move, outer London has therefore become an attractive and more attainable place to start or raise a family.

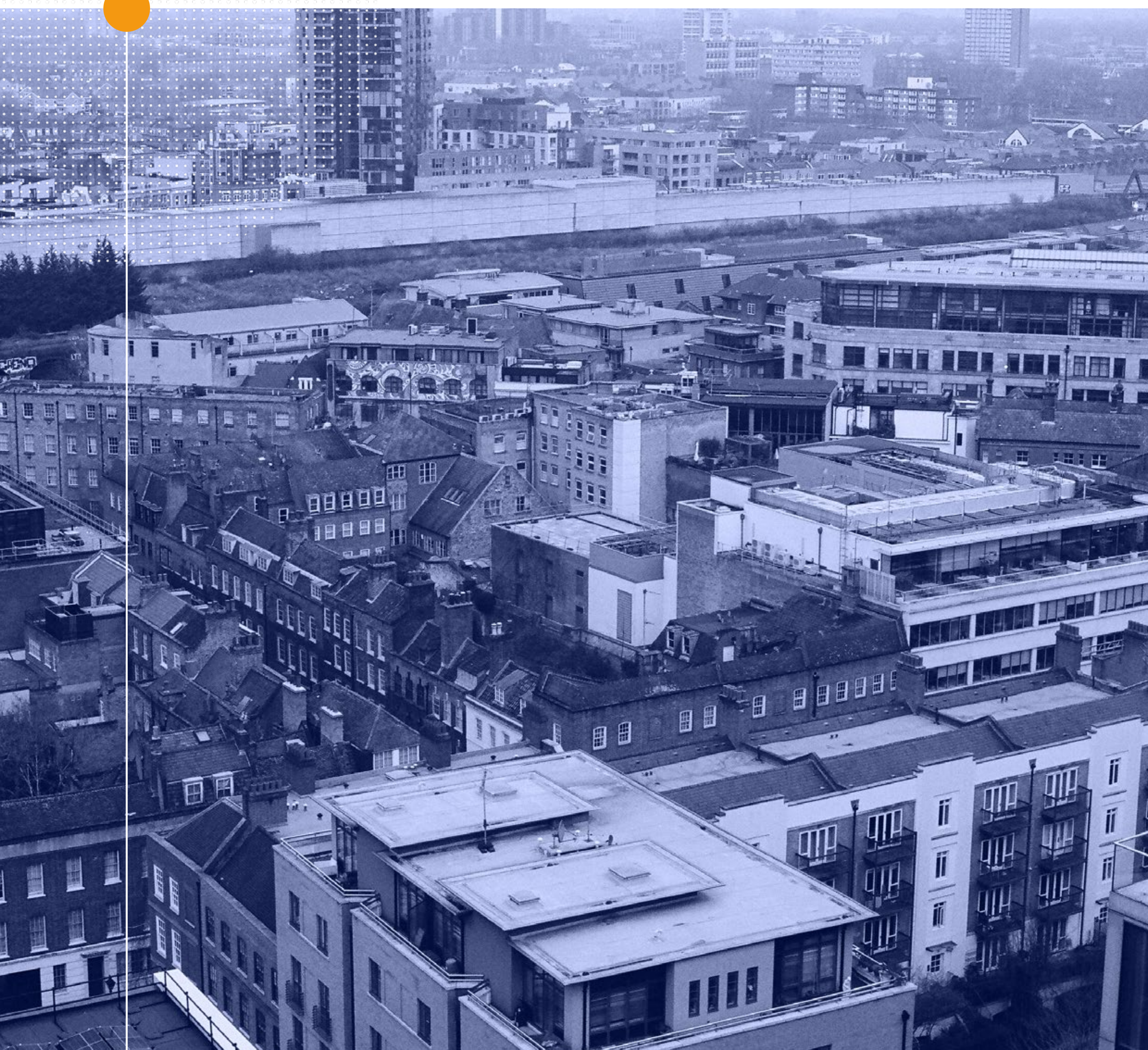
In parallel, inner London has increasingly attracted younger adults and students who are drawn to the city's universities, economic opportunities and offer of leisure opportunities and culture[27]. This reinforces a dual dynamic of inner London becoming increasingly child-free and a hub for early-career professionals and students and outer London becoming increasingly filled with families as a base for family life.

Social factors such as proximity to family are an important but often overlooked factor in shaping where families in London live today.

While affordability constraints have reduced the appeal of the inner city, London's families must trade this off against the benefits of living close to existing kin networks which can encourage families to remain in the more expensive inner boroughs, but likely as renters rather than home-owners. Meanwhile, outer London's appeal as comparatively affordable is strengthened by other amenities such as more family-friendly housing stock.

Chapter 3

What are the implications of the changes where families live in London for public services, local economies, and social cohesion?



This section details the broad an often-uneven implications of the changes in London's households with children for public services, local economies, and social cohesion.

For public services, we examine impacts on schools, maternity and neonatal services, housing and homelessness services, and local authority service planning. Schools have experienced falling school rolls, budget cuts and rising complexity of need through growing numbers of children with special educational needs and disabilities (SEND). Maternity and neonatal services have seen declining demand in some places and growth in others, creating uneven service pressures. Housing services are seeing growing numbers in temporary accommodation creating financial pressures and a redistribution of families across the city. Meanwhile, planning is under strain through population changes that are happening faster than data can capture.

For local economies, the changing nature of London's high streets is explored with families in more affluent areas more likely to have access to health-promoting retail mix compared with those in the most deprived areas. It also considers the sustainability of London's labour pool which is under strain from falling birth rates, increasing the importance of migration in the capital.

For social cohesion, we explore the anchoring roles that families with children play in communities and the challenge that poverty and housing insecurity is bringing to the stability, social networks, and trust within communities.

Public Services

Schools have been visibly impacted by falling birth rates and a redistribution of households with children across London.

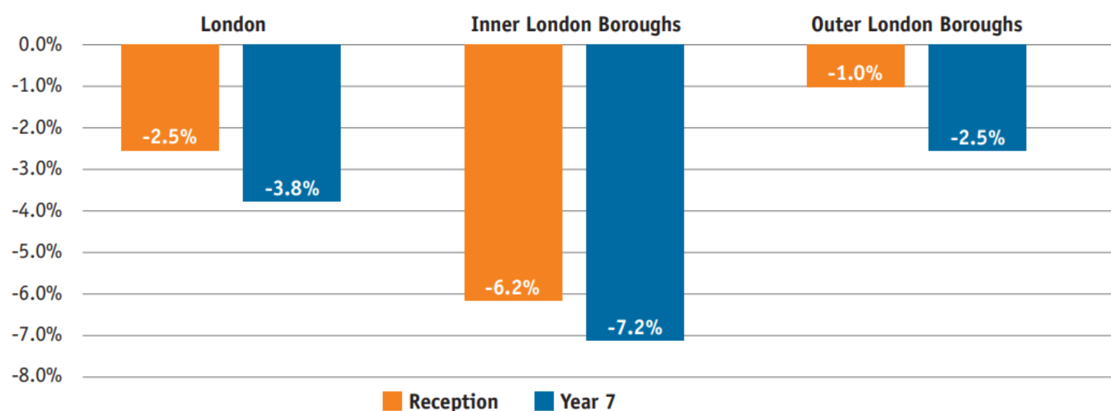
Across England, the number of primary school pupils dropped by 150,000 between 2019 and 2025[28]. However, the issue is more acute in London where nine of the ten local authorities with the largest drops are located.

Westminster saw the largest decline at 15.9%, followed by Lambeth, Southwark, Hackney, Camden, Hammersmith and Fulham, Islington, Merton, and Wandsworth[29]. With the exception of Merton, all are inner London authorities, highlighting the concentration of the issue in the inner city.

London Councils estimate that from 2025/26 to 2029/30 there will be a 2.5% reduction in demand for reception school places however, this is largely driven by inner London where the decline sits at 6.2% versus outer London's more moderate 1% decline[30]. As this trend has been sustained over the past decade, the pressure is now escalating with secondary schools expected to be hit with a 7.2% decline in year 7 places in inner London and 2.5% in outer London by 2029/30.

Figure 18

Percentage change in London school places, 2025/26 to 2029/30



Source: Reproduced from London Councils, Managing school rolls and maintaining educational standards in London (January 2026)

For these predominantly inner London boroughs, the repercussions of falling school rolls are very significant.

School funding is given on a per-pupil basis meaning reduced pupil numbers result in reduced budgets. Forecasts anticipate the decline in enrolment will cause a £15 million loss of funding for primary schools and £30 million for secondary schools over the next four years[31].

The effects are already being felt. A quarter of schools across London are currently running a budget deficit and a further 38% have surplus balances less than 8% of their budget[32]. If enrolment falls further as predicted, these schools are expected to fall into deficit without intervention.

As pupil numbers fall, so do school budgets, resulting in cuts to staffing and curriculums.

With less money available, schools have had to make savings. The Sutton Trust's 2024 polling of school leaders in the UK revealed that 32% of school leaders reported cuts to teaching staff, 46% to support staff, and 69% to teaching assistants[33]. Alongside this, schools have saved by narrowing the curriculum, offering fewer subject options and reducing the number of school trips. In some cases, headteachers have had to fulfil multiple roles, such as cleaning school premises, to make up for the cuts to non-teaching staff.

While falling pupil numbers are an important driver of budget constraints, they are not the only factor pushing schools into deficit.

London Councils found no clear correlation between demand for school places and areas facing the greatest deficits — this is because other cost pressures have also had an impact[34]. In 2023–24, schools faced rising costs in their core spending. Teacher expenditure per teacher was estimated to have risen by 5.9%, largely because of significant pay awards[35]. Support staff expenditure per staff member was estimated to have risen by 6.5%, reflecting support staff pay settlements. Non-staff expenditure per pupil was estimated to have risen by 5.6%, driven by high inflation.

At the same time, staffing shortages have increased reliance on expensive agency staff. NFER found that between 2021/22 and 2022/23 the number of teachers considering leaving rose by 44%, while in 2025 three in four school leaders said recruiting teaching assistants was difficult.

Cuts to children's social care have also constrained school budgets. Between 2010/11 and 2023/24 council spending on early intervention services dropped by more than £2 billion — a fall of 42%[36]. These cuts were particularly pronounced in London which, after the North East, saw the second largest regional fall in local authority funding for children and young people's services between 2010/11 and 2018/19[37]. The result is schools who are already under financial strain due to falling school rolls, are taking on an increasing burden of child support that historically was more evenly distributed across service providers.

Falling pupil numbers do not mean that schools are becoming easier or cheaper to run as the complexity of need is growing.

A child is considered to have special education needs or disabilities (SEND) if they have a learning difficulty or disability requiring specialist educational support. If a child has a need greater than what school SEND provision can offer, their parent, guardian, or school can apply for an Education, Health and Care Plan (EHCP). An EHCP is an education, health and care support plan tailored to the child's needs which the local authority legally has to provide.

Since the Children and Families Act 2014 was introduced, the number of children and young people identified with SEND has increased from 1.3 million to 1.7 million[38]. Over the same period there has been a 134% increase in EHCPs reaching an all-time high of 638,000[39]. EHCPs are given to people aged 0–25 meaning not all of this rise is concentrated among school-aged children.

The surge in both the number of young people with EHCPs partly reflects a rise in need but also expanded recognition and understanding of SEND, and financial incentives on schools to seek out EHCPs.

Mainstream schools are required to cover the first £6,000 of per pupil SEND costs from their core budgets[40]. This places high strain on school budgets if a school has a high share of SEND students. They are however able to unlock more funding from local authorities, if costs exceed this threshold and in practice this requires a child to hold an EHCP to prove their need. As the £6,000 threshold has not been updated with inflation since its introduction in 2013, its real-term value has fallen significantly and more pupils surpass it[41]. Schools' ability to absorb SEND costs have therefore diminished, increasing the incentive to recruit students with EHCPs to obtain them for existing pupils with SEND needs[42]. However, with upcoming SEND reforms limiting EHCP provision to students with the most complex needs, the viability of this route to supplement otherwise constrained school budgets is under fire.

Not only are there more children with EHCPs but mainstream schools are taking on an increasing share of them. The proportion of pupils with newly issued plans entering mainstream schools rose from around 60% in 2015 to 75% in 2023, while the share entering specialist schools fell from around 30% to just 10%[43].

For London's schools, the result is that declining pupil numbers reduce income through the per-pupil funding model, triggering cuts to non-essential but highly valuable specialist staff while at the same time many of these schools have students with complex needs that require more funding and therefore increased financial pressure.

For some schools, falling school rolls become unsustainable. Without adequate budgets, concerns have grown that they cannot safeguard educational quality, leading to school closures and mergers.

Over the last five years there have been 90 school closures or mergers in London due to falling school rolls[44]. These closures are concentrated in inner London with most occurring in Southwark, Hackney and Islington which have each lost between four and six primary schools. The next hardest hit boroughs are Camden, Westminster, Wandsworth and Merton each reporting one to three closures.

Some schools are however better equipped to deal with these falls. Hammersmith and Fulham saw the sixth largest fall in pupil numbers out of all English local authorities but did not experience any primary school closures, highlighting the uneven effect of falling school rolls[45].

Reports of school closures are predominantly centred around primary schools, however, with the forecast decline in year 7 pupil numbers being greater than the decline in primary schools, it is likely that secondary schools will be hit next without intervention.

At the end of the chain effect of falling school rolls are children, who bear the consequences of budget cuts, school closures and mergers.

As funding pressures result in challenging cuts being made, concerns have been raised around schools' ability to maintain educational standards. Moreover, students in schools facing cuts receive a less comprehensive education than previous cohorts and students at better-resourced schools, further entrenching educational inequalities.

Disadvantaged pupils are also likely to be acutely affected by wider school budget pressures. The Pupil Premium is additional funding for state-funded schools intended to fund additional support for disadvantaged pupils. However, growing budget pressures are making it harder for schools to use the funds solely for that use. In 2024, 47% of senior school leaders reported using Pupil Premium funds to plug budget gaps, up from 23% in 2019[46]. The value of the Pupil Premium has also fallen in real terms with the IFS estimating a 14% reduction in value between 2015 and 2023[47]. This risks weakening the intended impact of the fund which is to narrow attainment gaps by improving educational outcomes.

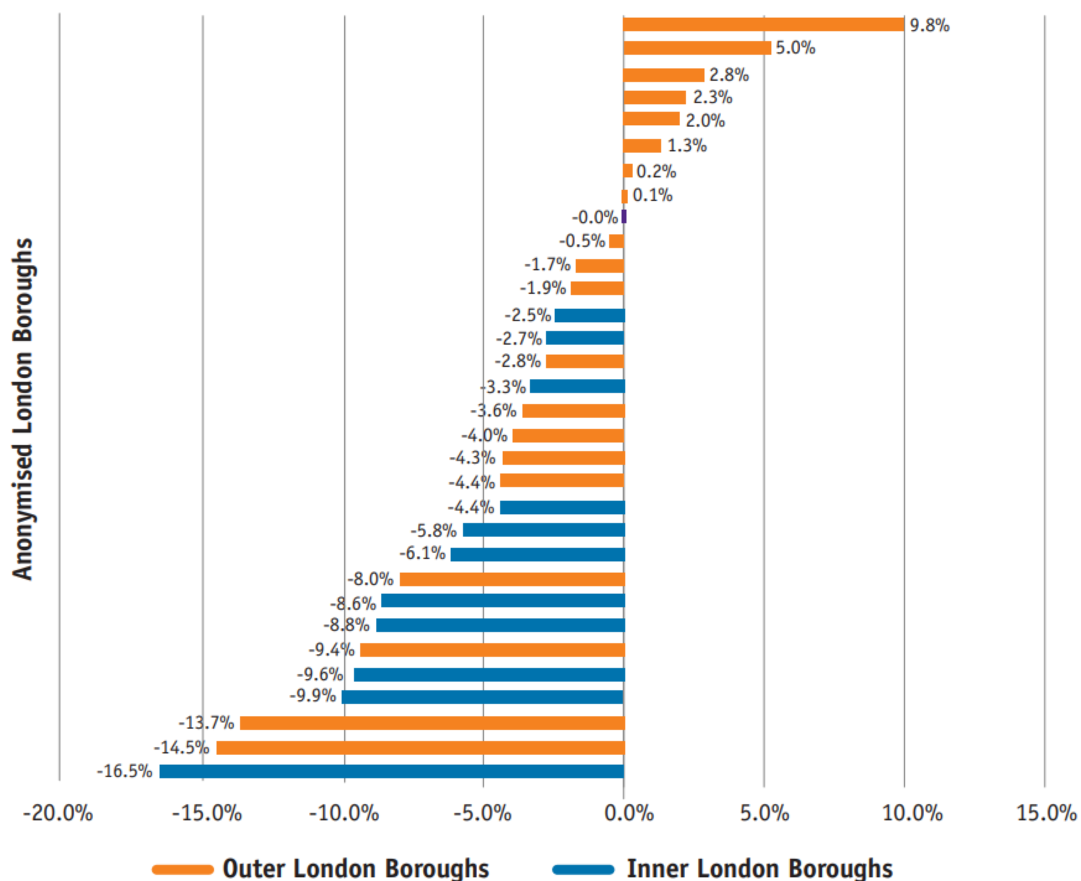
Per-pupil school funding is based upon the previous year's school census meaning there is a one-year lag between the pupil profile and funding allocations. This means funding does not always reflect the current size of needs of a school's cohort making adjustment for schools particularly challenging.

In London, high levels of residential mobility, driven in part by a concentration of families with children in temporary accommodation, has meant that schools with surplus places experience transient pupil populations and mid-year intakes which are not always captured in the census and therefore not reflected in the funding. Conversely, schools with strong parental preference and few — if any — spare places are relatively insulated from these effects.

While many of London's schools face falling pupil numbers and increasing financial pressure, a different picture has emerged in parts of outer London where the numbers of children are remaining stable or growing.

Figure 19

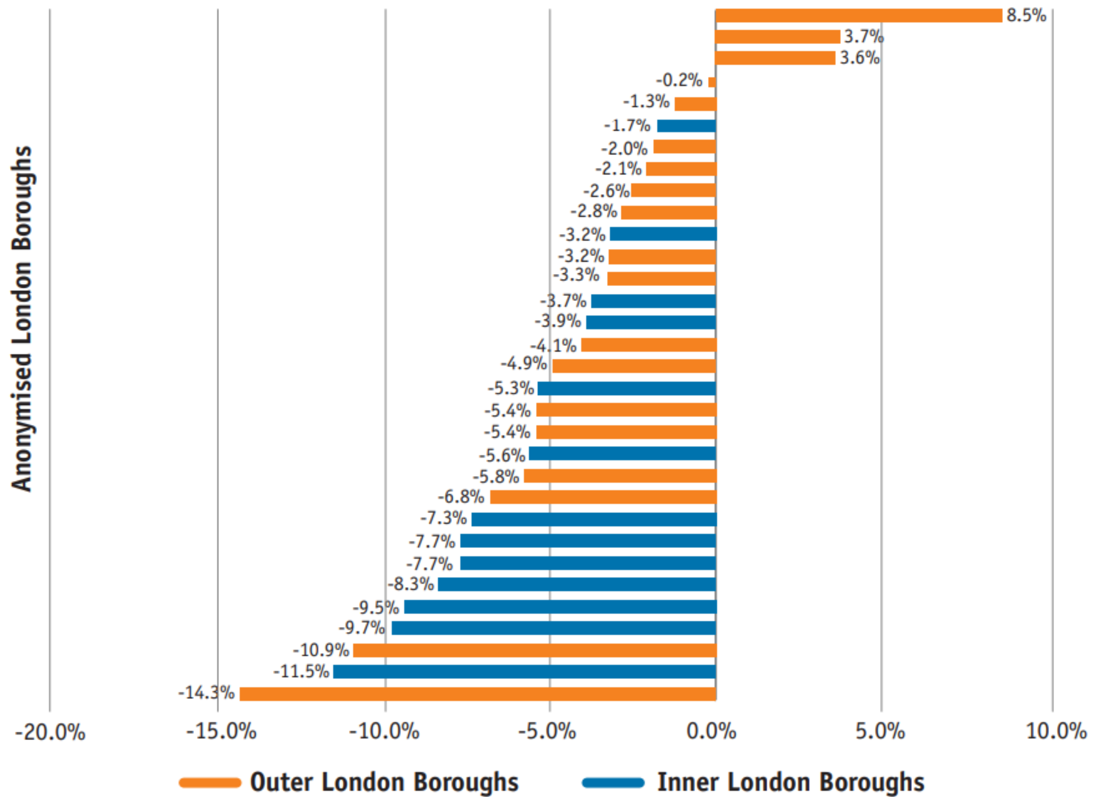
Percentage change in London Reception school places, 2025/26 to 2029/30



Source: Reproduced from London Councils, Managing school rolls and maintaining educational standards in London (January 2026)

Figure 20

Percentage change in London Year 7 school places, 2025/26 to 2029/30



Source: Reproduced from London Councils, Managing school rolls and maintaining educational standards in London (January 2026)

Seven outer London boroughs are set to see an increase in reception school places, with one borough seeing a 9.8% increase by 2029/30[48]. Additionally, three outer London boroughs are expected to see increases in the number of year 7 school places. This speaks to a trend of intra-city movement of families with children from inner to outer London alongside a trend of falling birth rates.

Changes in the prevalence and distribution of families with children are creating uneven pressures on maternity services.

Key health service provisions for mothers and babies are under pressure in certain areas due to falling demand, making it harder to maintain quality services for the families that remain.

Maternity and neonatal services require a minimum volume of births to support safe staffing rotas and maintain specialist neonatal care[49]. When births fall below these thresholds, hospitals struggle to justify continuing lesser-used units and to keep safe staffing levels. The result is that services in areas with low birth rates are often consolidated onto other sites.

Consolidations have been prominent in North Central London where the NHS's Start Well programme agreed to consolidate maternity and neonatal services onto four hospital sites including Barnet hospital, North Middlesex University Hospital, University College London Hospitals, and Whittington Health[50]. As part of this reconfiguration, services at Royal Free Hospital and birthing suits at Edgware Birth Centre are set to close, antenatal and postnatal care at this birth centre are to expand, and £67 million capital investment has been committed to expand and improve facilities at the remaining sites.

Conversely, some boroughs are seeing growing demand for maternity and neonatal services, as both births and the number of complicated pregnancies and births rise. Across England the number of pregnancies involving risk factors including older maternal age, obesity and pre-existing health conditions, has grown. These pregnancies often require more and specialist care meaning that even where birth rates are stable or falling, more resources are required for each birth.

The effect is particularly evident in North East London where there has been a rise in complex births and pregnancies and where population growth is predicted to outweigh declining birth rates[51]. Boroughs in this region such as Havering are under particular strain as their residential profile becomes younger, requiring health services historically geared towards older residents to adapt to growing demand for maternity care.

These changes in demand — with births falling in some places and rising in others — are putting pressure on hospitals already dealing with workforce shortages. In 2023, NHS England said that maternity and neonatal services "do not currently have the number of midwives, neonatal nurses, doctors, and other healthcare professionals they need"[52]. While the fulfilment of midwifery vacancies has improved, they are still significant at around 2,900 in July 2023[53]. This challenge is especially acute in London with the London Assembly noting that London's NHS has the highest vacancy rate nationally largely due to the city being highly unaffordable for staff[54]. This workforce shortage can therefore make it harder for services to respond to shifting demand pressures as hospitals facing rising demand may struggle to expand staffing quickly enough, while hospitals with falling demand may find it harder to retain staff and maintain safe staffing levels.

Changes to maternity services can also have uneven impacts across communities. When services are consolidated, the travel distance to a maternity unit can be increased. This change can be particularly challenging for low-income families who are less likely to have access to private transport and may be less able to afford any price increases in the journey, in addition to service users with disabilities. Measures to mitigate the impact of longer and more costly travel have however been considered. The Start Well programme said it would explore measures such as raising awareness of schemes that support travel costs and working with other organisations to assess the feasibility of a pre-paid travel card[55].

The uneven change in London's families with children is therefore reflected in the uneven impacts on maternity and neonatal services: growing demand pressures necessitating expansion in some boroughs and shrinking births necessitating closures in others.

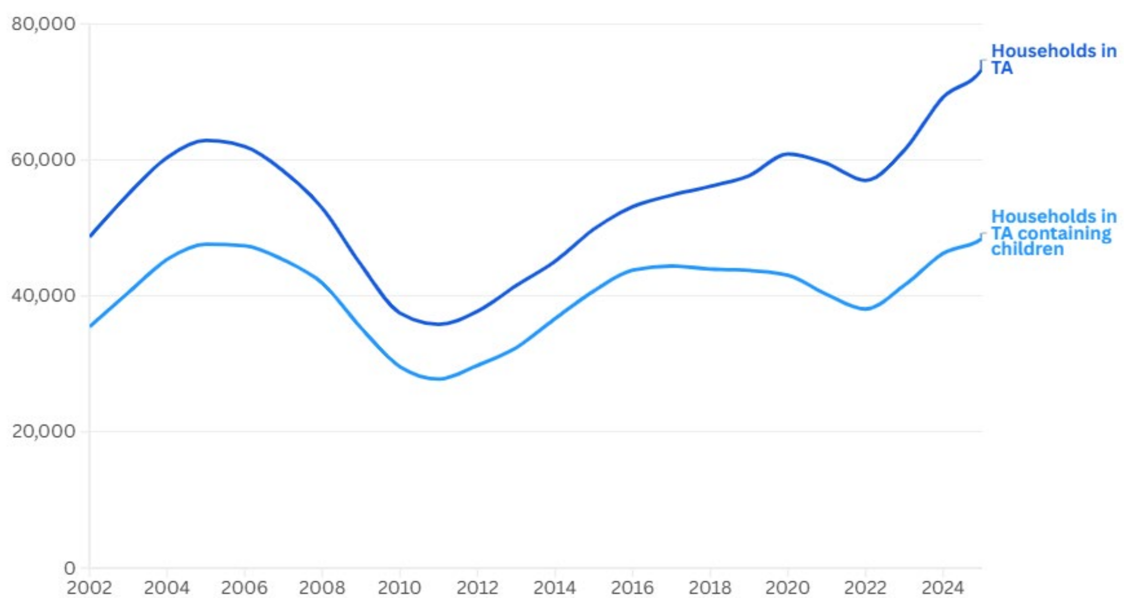
Soaring housing costs have contributed to falling birth rates and a redistribution of families with children; they have also created housing insecurity for an increasing number of families who remain.

Rising rents are continuing to price families out of the private rented sector, leaving some homeless when they cannot secure an affordable alternative.

Local authorities place these families in temporary accommodation, under their legal obligation to house homeless people, but as social housing is in dwindling supply families are spending extended periods in temporary accommodation. The consequence has been a sharp increase in the number of people across the population in temporary accommodation, rising from 48,678 households in 2002 to 74,720 in the second quarter of 2025[56]. Families with children are overrepresented, making up two thirds (66%) of these households, with there being a total of 99,190 children living in temporary accommodation[57].

Figure 21

Total number of households in Temporary Accommodation (2002–2025)



Source: Temporary accommodation live tables (2019–2024). Discontinued & Temporary accommodation tables (2002–2025) MHCLG

This rise in temporary accommodation needs is placing significant and growing strain on already stretched borough finances. London Councils estimate that temporary accommodation cost boroughs £5.5 million a day in 2024/25, up from £4.2 million in 2023/24[58]. As local authorities have a legal obligation to homeless households, this spending cannot easily be controlled resulting in the diversion of funds away from other services such as libraries, leisure centres, and children's centres in addition to measures like early intervention that could be used to solve the problem at its source.

Providing temporary accommodation is expensive and complex for local authorities. With a lack of suitable local TA options available, boroughs are increasingly relying on out of borough placements — when households are put in housing outside of their local authority bounds. London's use of out-of-borough placements has surged since 2011 where around 6,038 households were housed outside their home borough[59]. By 2024 this reached a record high of 31,040 households — almost half (45%) of all London households in temporary accommodation. Most of these households (85%) are placed within other London boroughs while the South East was the next most common destination (9%), followed by the East of England (5.2%).

This trend is not consistent across boroughs. Newham has the highest rate with 22.56 households per 1000 housed in temporary accommodation placed in another local authority district, followed closely by Lambeth (22) and Westminster at (20.75)[60].

Some of London's more affluent boroughs including Bromley and Richmond upon Thames have lower overall rates of both temporary accommodation use and out-of-area placements. Richmond upon Thames has 6.79 per 1000 households in temporary accommodation, with 5.1 placed in another local authority district. Bromley has 12.71 per 1000 in temporary accommodation and 10.28 in another district[61].

Although the overall numbers of households in temporary accommodation and placed out of borough are relatively lower, 75% of households in temporary accommodation in these boroughs are placed outside the area[62]. This means that the relatively small number of deprived households are disproportionately placed elsewhere, reducing the overall share of deprived households and reinforcing divides between boroughs.

Out of area placements export service pressures to other areas which must accommodate new populations. Areas taking in these placements face additional strain on housing services with Dartford Council saying it was finding it "extremely difficult to secure temporary accommodation within our own borough"[63] partly due to the high intake of households from London. Additionally, new and larger populations generate additional service needs putting additional strain on local authority budgets. As a result, some boroughs are put in a difficult bind of accepting these placements and accepting additional strain on their services and funding or restricting them and creating challenges over where to place families — who bear the brunt of high levels of insecurity.

Beyond creating uneven service pressure, out of borough placements reinforce the hollowing out of London as households in temporary accommodation are more likely to have dependent children and to have lower incomes.

London's rapidly changing and increasingly transient population makes it uniquely difficult for local authorities' to plan and respond to changing local need.

To understand their local populations, London local authorities rely on a combination of national statistics, such as 2021 ONS Census data and mid-year population estimates, with local administrative data, such as GP registration data, school census information and planned housing completions.

These datasets have varying strengths and weaknesses. ONS census data is highly detailed but only conducted every 10 years making it outdated while local administrative data is typically more up to date but is often less detailed and can still face time lags. This means local authorities have to continually bridge data from across sources to build the clearest possible understanding of their population and service needs.

With councils already relying on partial and lagged data — particularly the Census which only occurs once a decade — London's increasingly transient population makes it even harder to local authorities to have an accurate understanding of their population.

Westminster illustrates just how transient London borough's populations can be. In 2016 and 2017 less than half (45%) of households in the borough remained for more than a year, while a quarter (25%) of its full-time resident population moved out within a year[64].

Central to London's transient population is rising housing insecurity, particularly the sharp rise in temporary accommodation. Boroughs such as Newham that have high numbers of households in temporary accommodation can experience rapid and often unpredictable changes in their populations as households can arrive and leave at short notice. In these conditions, changes to local populations can move faster than updates to datasets making planning challenging.

Areas with large or growing migrant populations have also faced additional planning challenges because migration flows are often volatile and highly reactive to changes in national immigration policy. For example, the Homes for Ukraine scheme in 2022, which was introduced to grant refuge to Ukrainians fleeing war, led to 155,000 arrivals in the same year some of whom came to London and therefore local authorities had to quickly adapt to larger populations and increased service needs[65]. Similarly, migration numbers can contract quickly. Policy changes introduced in 2024 restricted most international students from bringing dependents contributing to an 86% fall in the number of student dependents arriving in the UK from 121,000 to 17,000 in 2024[66].

Population changes which are less volatile can still however present planning challenges. Population projections allow councils to plan around future demand for services such as schools, but there is uncertainty in these projections as external factors cannot always be accounted for. An example of this is the difference in various forecasts of fertility rates made by the Government Actuary Department and ONS. Pre-2000 projections did not forecast a decline in fertility while post-2000 projections did not forecast a sustained growth in fertility[67]. Equally in the early 2010s growing birth rates led to calls to increase school places to keep up with rising demand. These calls were however short lived as birth rates soon declined. The overarching challenge of this uncertainty is that once capacity is removed through closures or merges it can be difficult and expensive to recover. Likewise, if capacity is expanded only for demand to subsequently fall, this results in yet more complex and resource-intensive reshaping of services and the possibility of wasted investment.

In conclusion, the large and uneven shifts in the numbers of households with dependent children has placed intense pressure on public services in London.

On the one hand, inner boroughs seeing falls in the share of families locally are struggling to maintain core services such as primary schooling and family health services, while also supporting escalating numbers of homeless families affected by London's housing affordability crisis.

One the other, parts of outer London are seeing significant increases in demand and are struggling to keep up, relying on out-of-date Census data.

Neighbourhoods

Over the past 20 years, London’s high streets have increasingly diverged into two distinct trajectories that have created diverging realities for children’s everyday environments.

High street composition is shaped by local purchasing power, residential churn and planning decisions, with important implications for local economies and children’s everyday environments.

Where higher-income households have moved into or become more concentrated in neighbourhoods, retail mixes have responded to fit to their preferences, lifestyles and relatively larger disposable income. In London’s more affluent neighbourhoods this has meant a growth in chains, alongside specialist food stores, artisan bakeries, and boutique stores[68]. Cafés also often proliferate; this can reflect the new populations’ likelihood to work in white-collar jobs that are worked remotely and therefore demand informal workspaces[69]. High streets in more affluent neighbourhoods also tend to have more wellness-oriented stores and social infrastructure amenities including gyms, leisure centres and social clubs[70]. These dynamics are visible across many of London’s high streets. Hampstead Village for example has a combination of cafes, restaurants, and independent shops which is used both by its relatively more affluent local population and visitors to the area[71].

The inverse trajectory has emerged in London's more deprived neighbourhoods. The Independent Commission on Neighbourhood's study showed that England's poorest areas have around 25% fewer social infrastructure amenities including pubs and cafés and the aforementioned gyms, leisure centres and social clubs, while having over 70% over saturated retail shops including fast food outlets, betting shops, and vape shops in addition to more off-licences and vacant premises[72].

This over-saturation is visible across many of London's more deprived neighbourhoods. In boroughs such as Brent and Lambeth, local authorities have introduced planning measures to reduce the oversaturation of potentially harmful shops — specifically adult gaming centres in Brent[73] and betting and payday loan shops in Lambeth[74].

Taken together, this means households in more deprived areas are, on average, more exposed to 'health-reducing' outlets associated with poorer health and financial harms and have less access to 'health-promoting' spaces that support social connection and exercise, making deprivation harder to overcome.

These contrasting high street trajectories are often interlinked by patterns of residential mobility. Part of the influx of affluent households into some London neighbourhoods involves the outwards migration of these households from more deprived areas. The process, described as escalator churn — where 'residents whose circumstances improve move out' of their area — can further entrench deprivation[75]. When these households move, the area they leave becomes worse off as they leave behind the most deprived households. This generally damages the local economy by reducing collective spending power that can support a diverse mix of shops and services.

For families with children, these diverging high streets mean everyday experiences are markedly different depending on how deprived the neighbourhood the family lives in is. Families with children growing up in London's more affluent neighbourhoods, are more likely to have local access to social infrastructure and health-promoting amenities compared to those in London's more deprived neighbourhoods meaning London's neighbourhoods both reflect and reproduce deprivation levels.

However, this divergence is not inevitable as high street retail composition is not always determined by market forces, but can also be shaped through purposeful placemaking. Consolidated ownership, whether institutional or public, allows for a greater shaping of retail mix as low-yield but socially valuable premises that attract people to high streets can be cross-subsidised by incomes from more profitable premises. In contrast, where ownership is more fragmented, which is more typical in London, individual landlords are typically more concerned with maximising their individual yield and avoiding vacancies.

As the numbers of families in London’s various neighbourhoods have diverged, with greater numbers of children in comparatively deprived outer London areas, the character of those neighbourhoods have changed too.

Gentrification, particularly in some of London’s most historically diverse inner-city neighbourhoods, has received considerable attention, with local high streets changing to respond to the preferences of newer and more affluent residents.

While these changes too-often result in the displacement of existing local businesses serving current residents, they can also support more family-friendly and amenity-rich high streets.

By contrast, other neighbourhoods in London have seen high streets decline, with a greater saturation of including fast food outlets, betting shops, and vape shops in addition to more off-licences and vacant premises.

Social cohesion

Families and children tend to play an anchoring role in communities, supporting strong social cohesion. This is however being undermined by high levels of poverty and population transience in the capital.

Social cohesion refers to strength of social connections, trust and equality among both within local communities and across society.

Communities with strong social cohesion tend to have better physical and mental health outcomes, greater cooperation, and stronger economic prosperity — making it a core foundation for strong communities.

Compared with the rest of England, levels of social cohesion in London are broadly average. The 2023/24 Community Life Survey shows that London ranks highest for civic action, but this is offset by weaker performance on other measures, placing 5th for volunteering, 7th for neighbourhood belonging, and last for social support[76]. This reveals a city where political and formal participation is high but everyday connections and support networks are less consistently felt.

Households with children are often embedded in neighbourhood social networks due to regular interaction with schools and early years setting that facilitate both formal social integration — through elements such as Parents-Teachers Associations — and informal social integration — such as everyday interactions at school gates. Moreover, the Survey of Londoners (2021–22) found that households with children, particularly couples with children, consistently report more positive experiences across most measures of neighbourhood belonging, trust and local engagement.

However, families with children are not the only group driving social cohesion. While households with children report stronger neighbourhood belonging and participation, Londoners who are single and without children are more likely to report having diverse friendship networks and more frequent contact with a wider range of social groups, including older people, and people from a different social class and ethnicity to themselves. These differences highlight the importance of varied groups in contributing to different aspects of social cohesion.

While families with children have the potential to strengthen social cohesion, this role is increasingly undermined by poverty, financial insecurity and deprivation.

In Britain, people experiencing financial insecurity are significantly more likely to feel disconnected from society than those who are financially comfortable[77]. 67% of people who struggle to make ends meet feel disconnected compared with 37% of those who do not. Evidence from the Survey of Londoners 2021–22 illustrates the same pattern in London, with residents in more deprived groups reporting lower levels of neighbourhood belonging, participation, and contact with their community.

This is largely due to poverty creating stress, cost and time pressures that limit peoples' capacity to participate in social life. The Joseph Rowntree Foundation found that 84% of people who are struggling financially reduced social activities or hobbies because of living costs[78].

However, the relationship between deprivation and social cohesion is not always negative. Londoners in more deprived groups report stronger belonging to London and more frequent use of low-cost, accessible community spaces and activities such as street markets, shopping centres, playgrounds, as well as involvement with mutual aid groups. For example, Queen's Market in Newham has been elemental in providing a social space for marginalised and vulnerable groups and enabling them to access support and care[79], leading Newham Council to ensure its preservation during regeneration. This points to the importance of these spaces in facilitating social connection and participation among lower-income communities.

Growing housing insecurity is threatening social stability and cohesion in London, particularly for families with children.

High and rising levels of population transience, driven by housing affordability pressures and growing use of temporary accommodation, undermine the stability and neighbourhood belonging that is foundational to community cohesion.

Families in temporary accommodation can be moved at short notice, multiple times, and out of the areas they have existing ties to. These moves can sever ties to schools, families and support networks. As a result, both the ability and incentive to build relationships within the community are weakened.

This instability weakens the social networks that help households remain in their neighbourhoods and maintain quality of life. Evidence shows a strong negative association between deprivation and the strength of local relationships (-0.52), indicating that residents in more deprived areas are significantly less likely to report having social networks that support them to stay locally or cope with challenges.

Poverty and housing insecurity have a negative impact on local community strength, but also institutional trust.

Residents in London's more deprived boroughs are significantly less likely to trust that public institutions — such as the police, schools, NHS, local authorities and government — are accessible, equitable, responsive and representative of diverse and evolving community needs. The 2024 Khan Review on social cohesion helps explain this dynamic, finding that people experiencing poverty often feel unsupported and left behind leaving them to become disillusioned with the institutions that are supposed to support them.

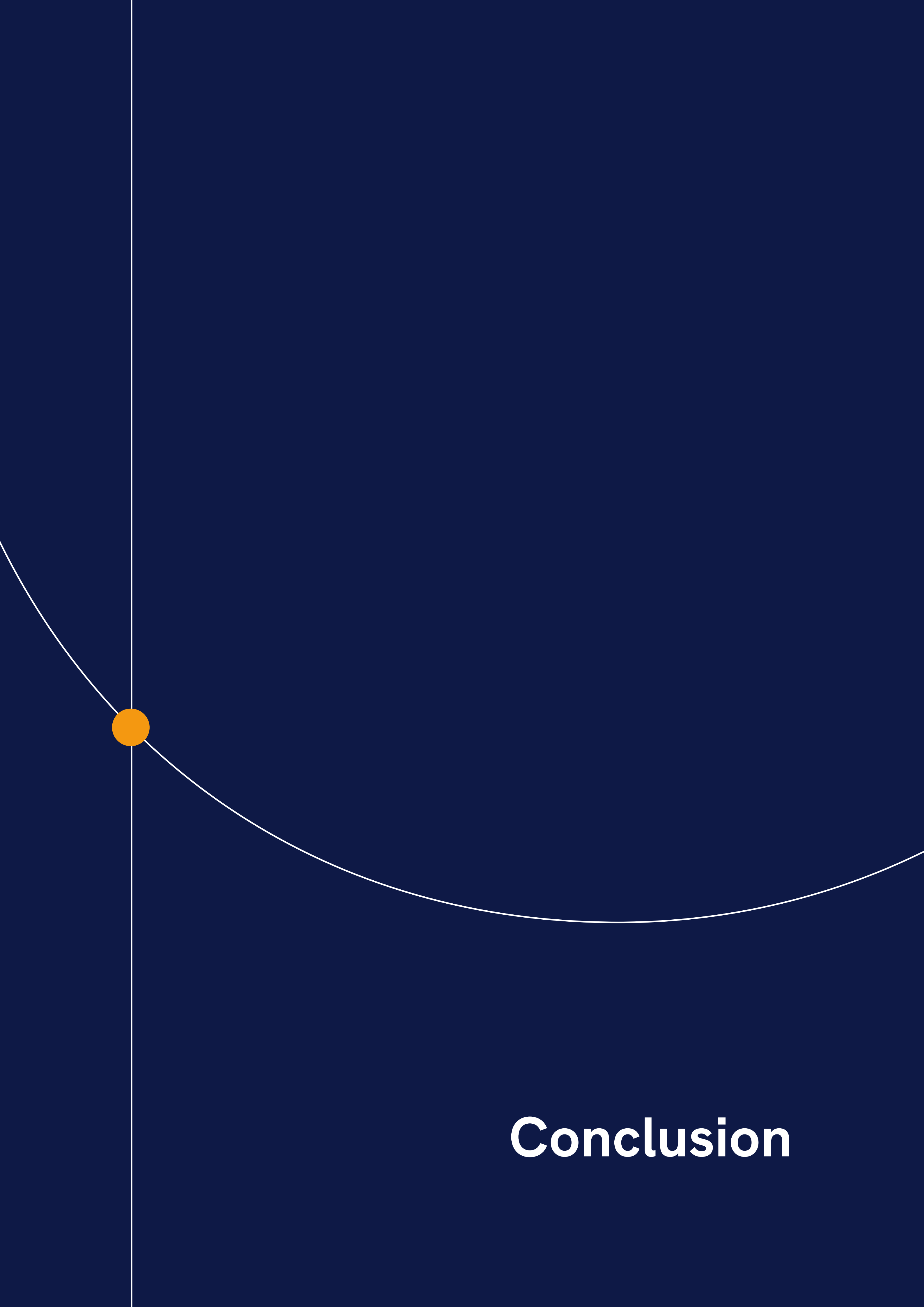
Weaker cohesion in London's more deprived areas is reinforced by conditions that deepen disadvantage.

Levels of safety and social support are negatively associated with deprivation meaning the more deprived an area the less safe it is, and the less social support provided. These conditions can deepen disadvantage. When residents do not feel safe, they are less likely to spend time in public spaces participating in community life, limiting opportunities to build connections. At the same time, lower social support means less collaboration between organisations and community groups to meet local needs — work that can prove valuable in reducing deprivation. These conditions therefore contribute to the persistence of deprivation.

Families with children often act as anchors within communities, with routines such as school runs and use of local services that embed them in neighbourhood life.

However, this role is increasingly undermined by the concentration of deprivation and housing insecurity among these households, both of which are associated with weaker social cohesion.

Deprivation and insecure housing place strain on community ties: they disrupt residents' connections to place, limit the time and capacity to build new networks, erode trust in institutions through feelings of being left behind, and reduce participation in local civic life.



Conclusion

London is not becoming a city without families with children, but it is becoming a place where the realities that families with children face are increasingly unequal.

Over the past two decades, the total number of households with children has grown in both inner and outer London, however, the share of households with children in most of inner London has shrunk significantly while outer London has absorbed much of the growth.

At the same time, many of these families are facing increasing affordability pressures that are leading to the concentration of families in London's most deprived neighbourhoods and pushing more families into insecure housing.

The result is a compounding set of challenges across the city. School rolls are falling in much of inner London while parts of outer London are seeing rising demand. Maternity services face similar pressures with falling births in parts of London undermining service quality, while others struggle to keep pace with rising and increasingly complex needs. Affordability pressures are also accelerating housing need. Central to these challenges are local authorities who have to plan for increasingly transient and uncertain populations.

These trends are set to continue. On current trajectories, inner London will have 31,435 fewer children by 2031 compared to 2026, and 44,537 by 2036. And this fall is not exclusive to the inner parts of the city: outer London is expected to see 48,760 fewer children by 2031, and 70,041 by 2036.

For the families that do remain, the risk is of an increasingly polarised neighbourhood experiences, through diverging high streets and level of social cohesion, that reinforce spatial inequalities across the capital and the divergent life chances for the capital's children and young people these entail.

Understanding these shifts and their implications is therefore a critical first step in planning for London's future, to ensure the capital is a place where families can afford to live, local economies and communities are strong, and public services are equipped to meet the needs of families across the city.

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