

In Capital Health?

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Key focus is on NHS healthcare workforce

- How (?why) is London “different”
- What do these differences mean for policy responses

Contents

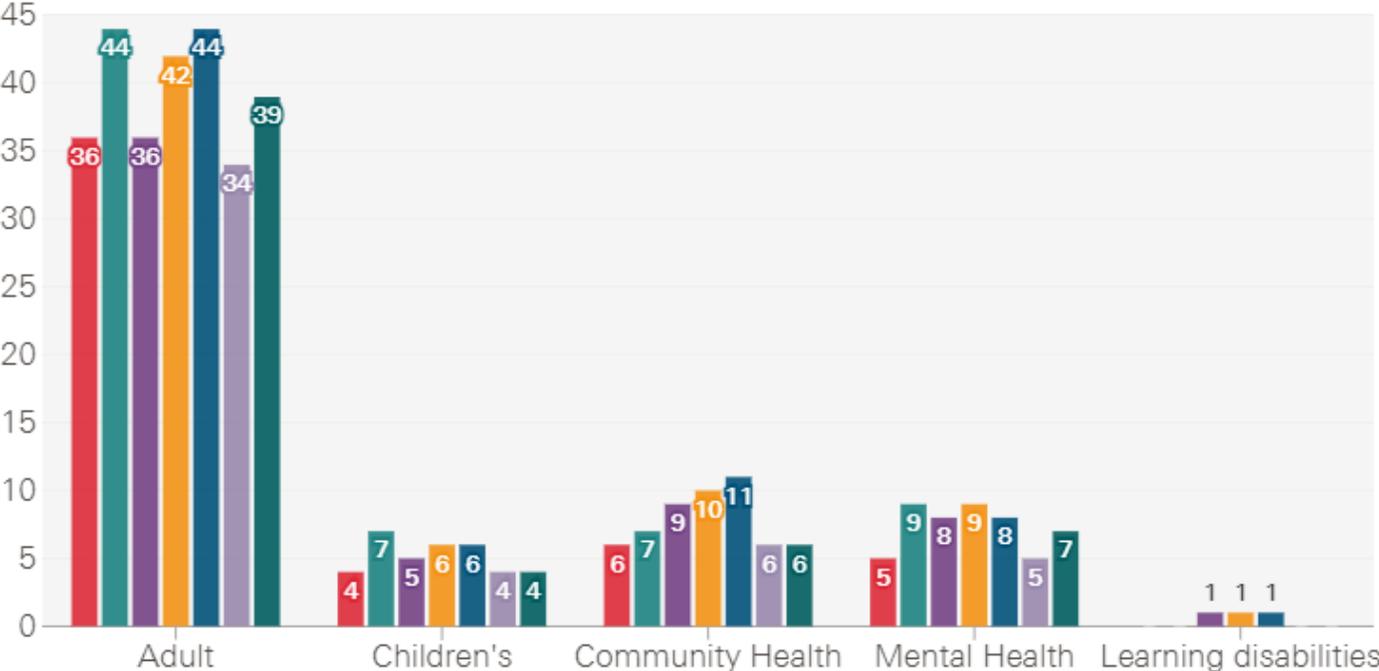
- Differences in staff profile
- Vacancies and stability
- Joiners/ leavers/ International recruitment
- New nurse qualifiers
- Rental costs/ cost of living

London has fewer nurses in community health and learning disabilities

FTE Nursing density

East of England London Midlands North East and Yorkshire North West South East South West

FTE nurse numbers per 10,000 population by region and nursing branch



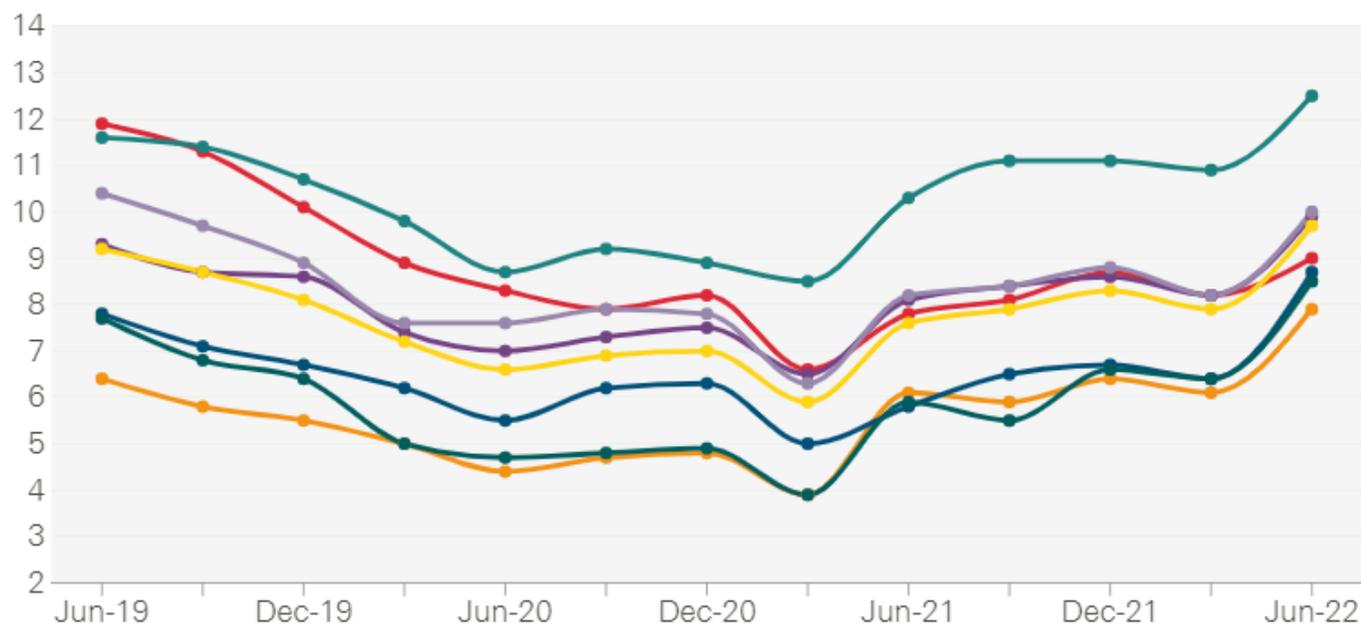
- This chart shows the number of FTE nurses per 10,000 of the population by branch and by region.
- FTE nurse numbers by branch shows that in all branches except for Children's, there are more nurses in the Midlands than in London
- London also has some of the lowest numbers across Community Health and Learning Disabilities

Overall HCHS FTE vacancy rates in England show a slow reduction prior to the pandemic before increasing to 9.7%, higher than pre-pandemic rates

Overall HCHS Staff Vacancy rates

East of England London Midlands North East and Yorkshire North West South East South West Overall

Overall HCHS FTE Vacancy rates (%), June 2019 - June 2022



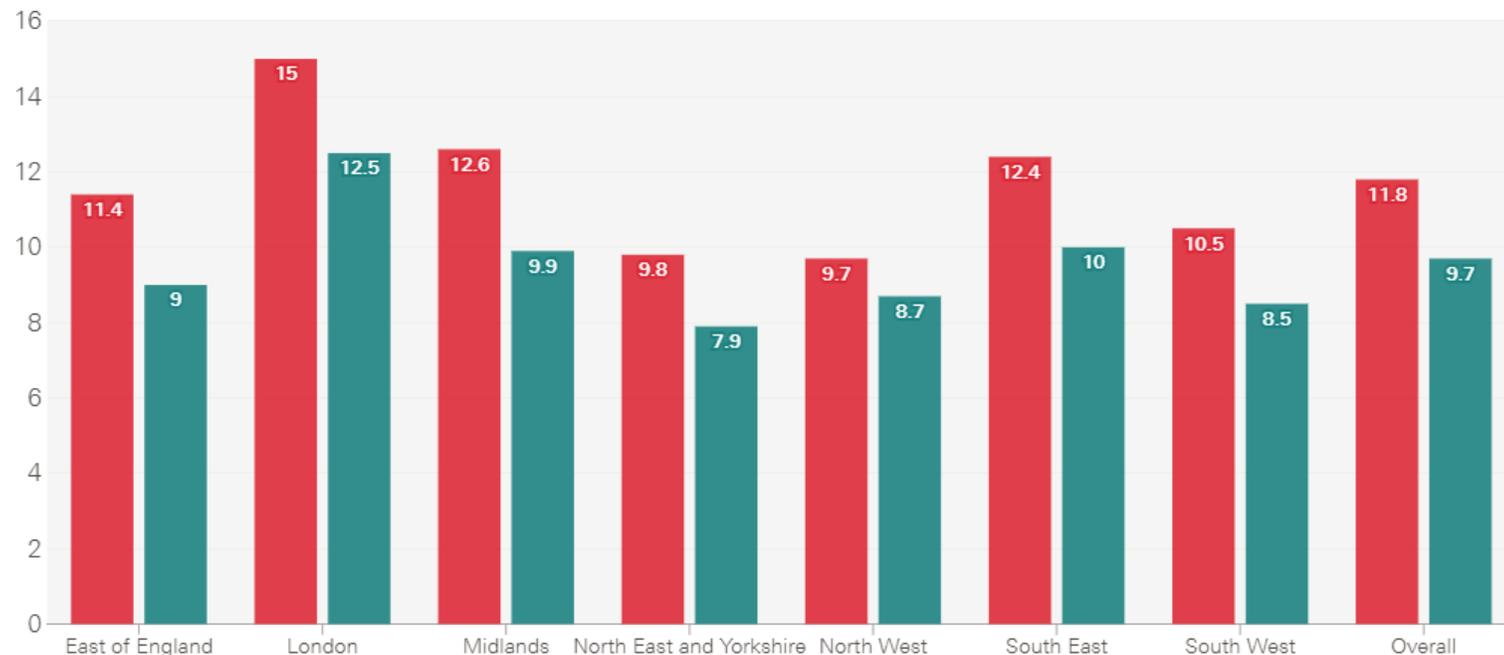
- London has the highest vacancy rate of all regions in England, surpassing 12% and the pre-pandemic rate of 11.6% in June 2019
- All regions experienced sharper declines in vacancy rates between Dec 2019 and Mar 2020, and Dec 2020 and Mar 2021, in line with waves of the pandemic.
- Between Mar 2021 and June 2022, almost all regions experienced an increase in vacancy rates of 2%, except for the East of England, which had the smallest vacancy rate increase of 0.8%.

Among registered FTE nurses, London has consistently had the highest vacancy rate since June 2019, compared to other regions in England

FTE Vacancy rates by staff group

■ Registered nursing vacancy FTE rate (%) ■ Overall HCHS vacancy FTE rate (%)

Registered Nursing and overall HCHS Vacancy Rates (%), by region



- As of June 2022, London had both the highest registered nurse vacancy rate and overall vacancy rate

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Source: NHS Vacancy Statistics England April 2015 – June 2022 Experimental Statistics

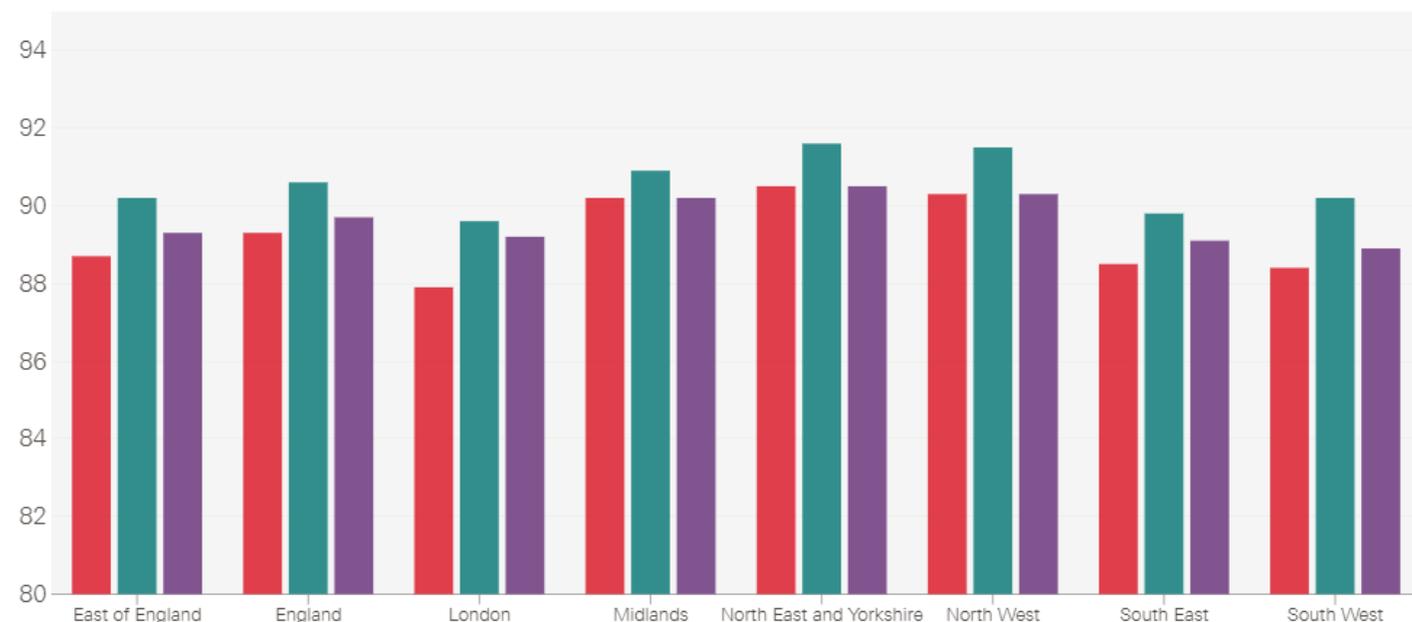
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Stability levels across all FTE staff groups across England were higher than those recorded prior to the pandemic, but lowest in London and the South

All Staff Group Stability Index (%) over time

■ 201809 to 201909 ■ 201909 to 202009 ■ 202009 to 202109

Stability Index (%) for all staff groups, by region



- The Stability Index is the percentage of staff there at the start of the period that do not leave the specified group (e.g. organisation, staff group or the NHS in England) during period in question.
- All regions experienced a higher stability index during the initial pandemic period (September 2019 to September 2020), than the twelve months either side
- Higher stability indexes were recorded within the North of England for all periods.

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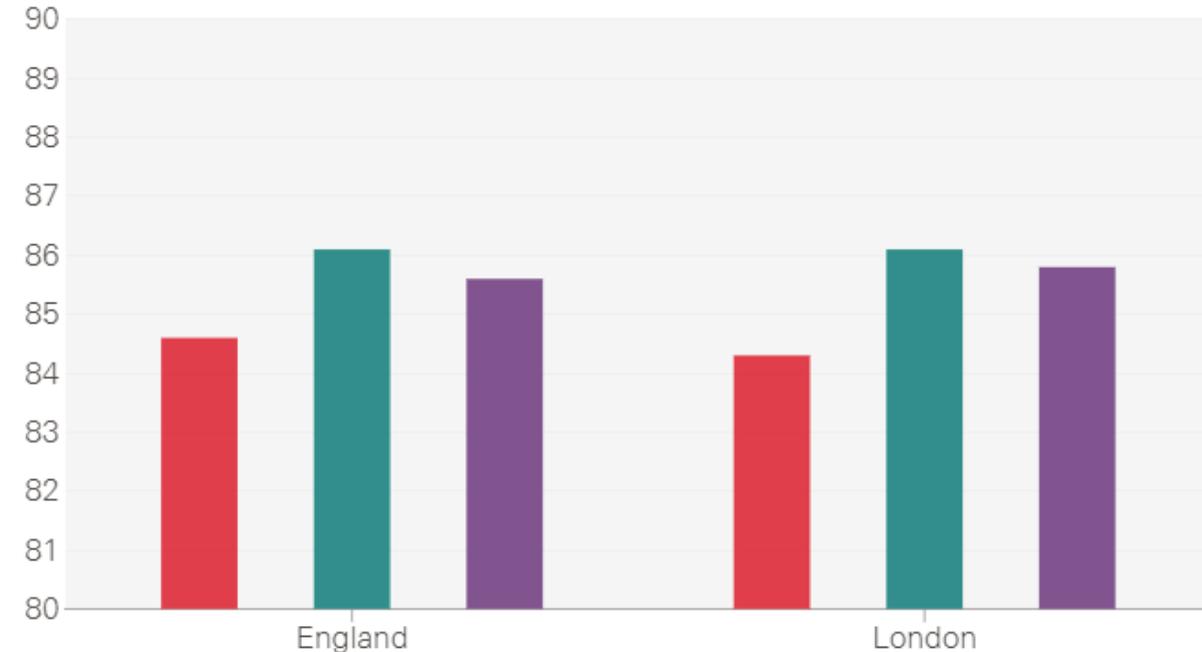
Source: NHS Hospital and Community Health Services (HCHS) staff, NHS Trusts and CCGs in England September 2021

A higher stability index was recorded across all time periods for Nurse and Health Visitors compared to all staff groups, though this was still lower in London

Nurse and Health Visitor Stability Index (%)

201809 to 201909 201909 to 202009 202009 to 202109

Stability Index (%), by region



- Though the stability index was lower for all staff groups in London compared to the England total, they were almost identical for Nurse and Health Visitors across all time periods
- Compared to all staff groups in England Nurse and Health Visitors had a higher stability index



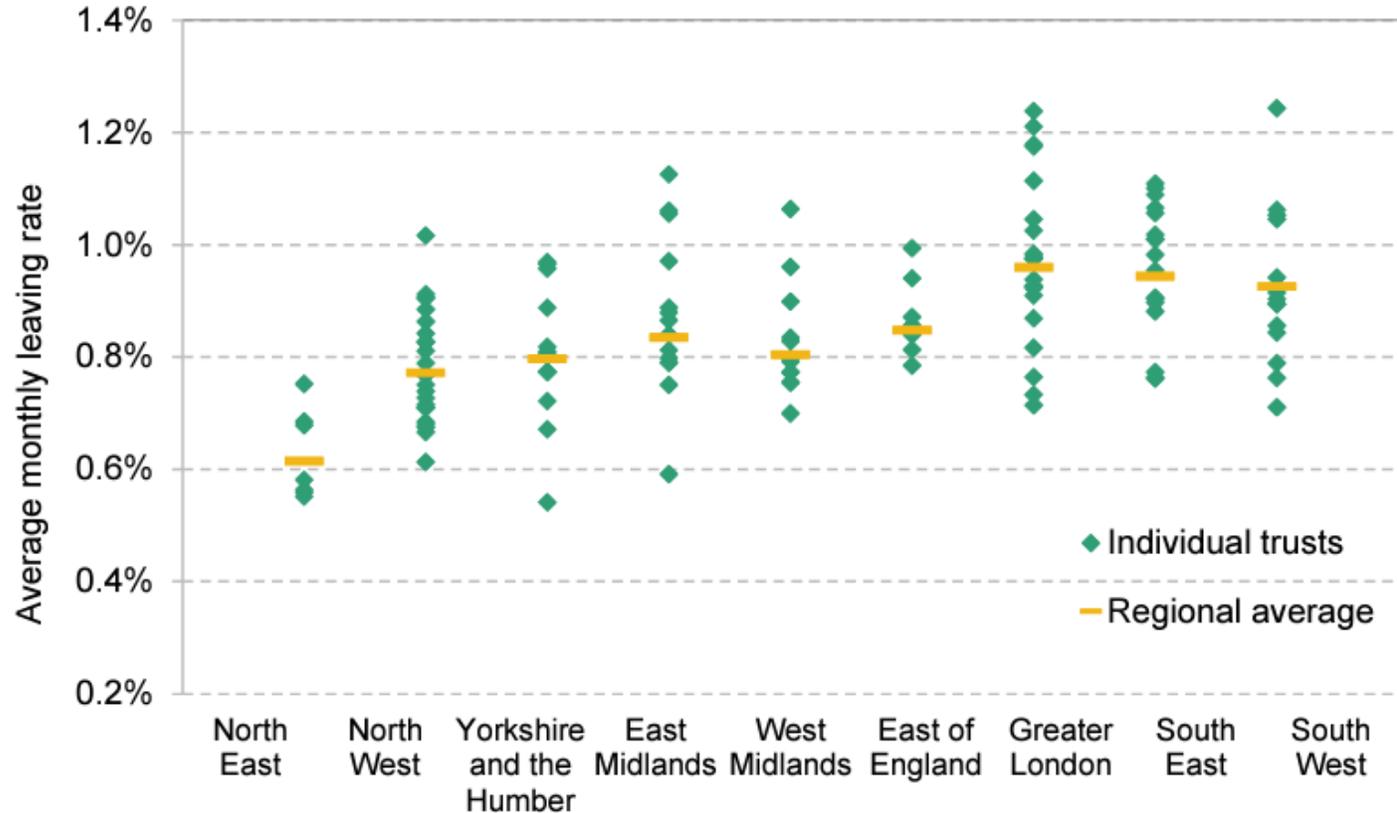
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Source: NHS Hospital and Community Health Services (HCHS) staff, NHS Trusts and CCGs in England September 2021

Average monthly leaving rates vary significantly across regions, with greater dispersion among individual trusts within London and the South West



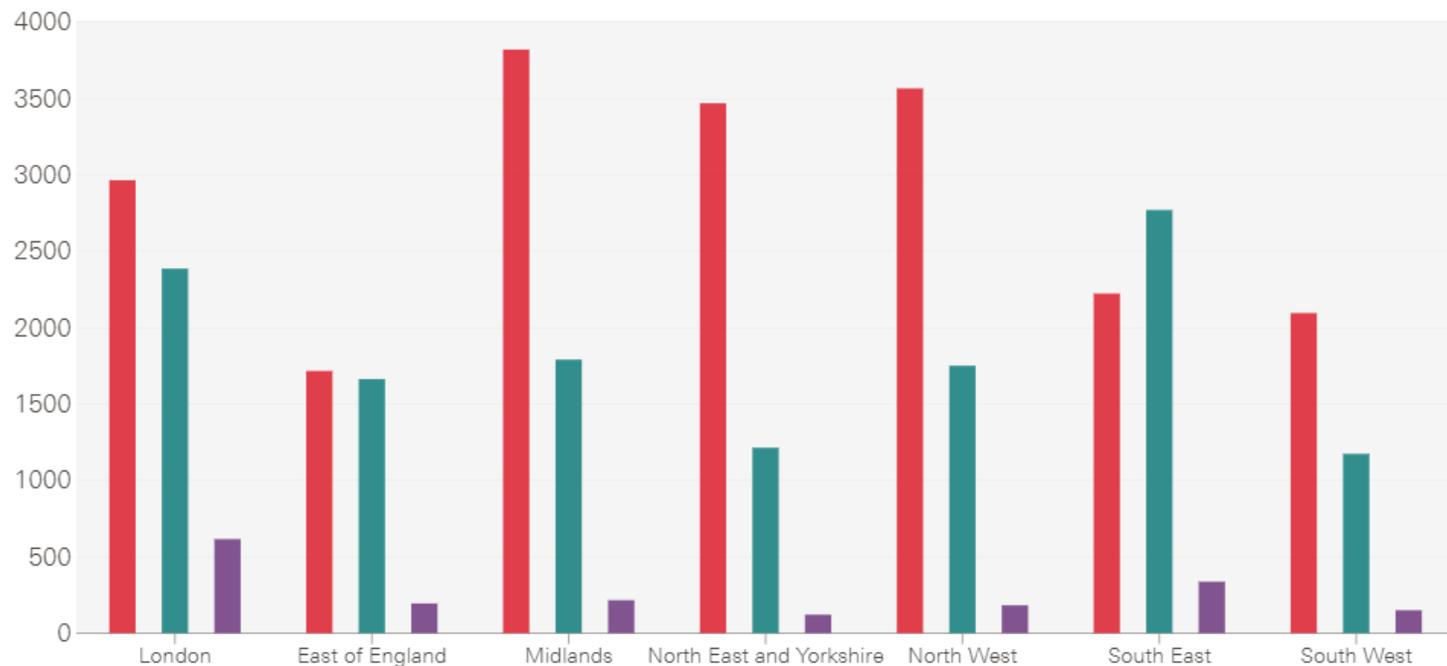
- This chart shows average trust leaving rates for nurses and midwives by region, both for individual trusts and the regional average
- The regional average for leaver rates for trusts in London and the South of England are close to 1%, far higher than those in the North of England
- There is greater variation in the average monthly leaving rate between individual trusts within London, the South West and the East Midlands.

In the year to September 2021, the South East [excl London] was the only region that had more non UK, non EU/EEA Nurses and Health Visitors joiners

Nationality grouping of Nurse and Health Visitor joiners

United Kingdom Rest of World Europe

Number of FTE Nurse and Health Visitor Joiners, September 2020 to September 2021, by region



- This chart shows the number of Nurse and Health Visitors joining the NHS by nationality grouping*, between September 2020 and September 2021.
- For all regions, there are more joiners from the Rest of World grouping than those in the EU.
- The South East was the only region that had more joiners from the Rest of World grouping than the UK
- In London and the East of England, there were just as many nurse and health visitor joiners from the UK as there were from outside the UK.

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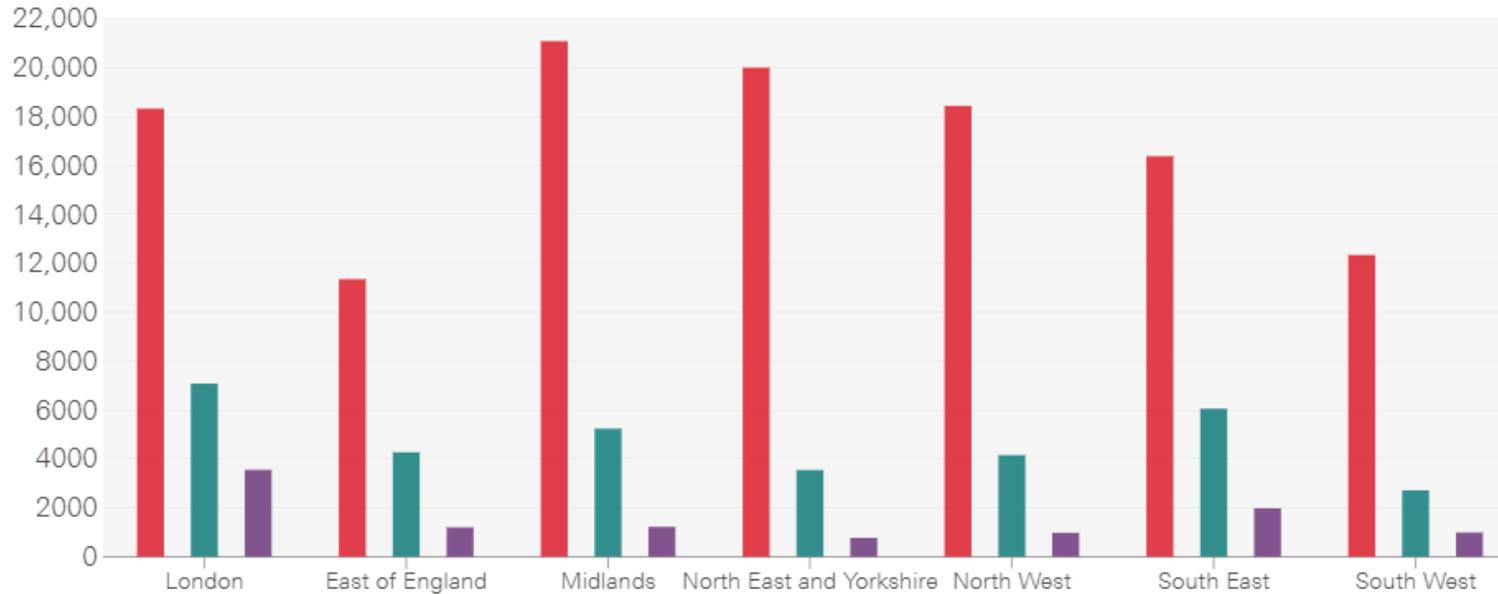
Source: NHS Hospital and Community Health Services: Joiners to NHS Trusts and CCGs by nationality, grade, staff group and NHS England region between 30 September 2020 to 30 September 2021

In the twelve months to September 2021, London had the highest proportion of international joiners

Nationality grouping of All Staff joiners

United Kingdom Rest of World Europe

Number of FTE All Staff Joiners, September 2020 to September 2021, by region



- This chart shows the number of joiners to the NHS for all staff groups by nationality grouping*, between September 2020 and September 2021.
- For all regions, there are more joiners from the Rest of World grouping than those from the EU/EEA.
- London had the highest proportion of non-UK joiners (37%) as a proportion of all joiners.
- Conversely, the North East and Yorkshire had the highest proportion of UK joiners (82%) and lowest proportion of non-UK joiners (18%)

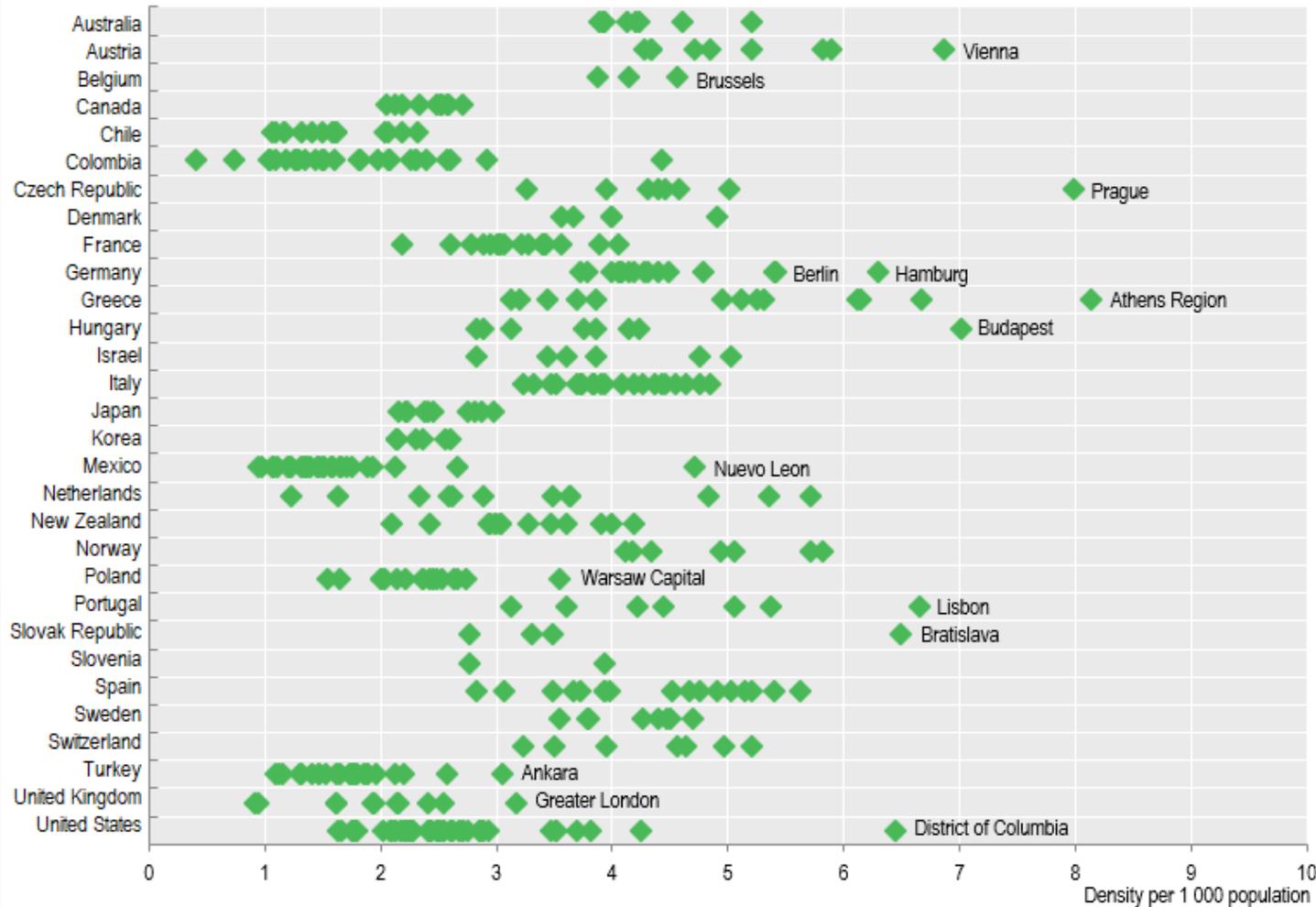
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Source: NHS Hospital and Community Health Services: Joiners to NHS Trusts and CCGs by nationality, grade, staff group and NHS England region between 30 September 2020 to 30 September 2021

International comparisons of physician density across regions show that capital cities have the highest physician density per 1000 population

Figure 8.9. Physician density across regions, by territorial level 2 regions, 2019 (or nearest year)



- Capital cities tend to have a far higher physician density compared to the second highest physician density region. This is especially evident in Czech Republic, Hungary, Mexico, Slovak Republic, and the United States.
- Within the US, the physician density within the District of Columbia is almost four times more than that of the lowest physician density region.
- In the UK, this difference is smaller, with three times more physicians per 1000 population in Greater London than that of the lowest physician density region.
- In contrast, there was lower regional dispersion within Korea, Canada, Japan.

For the 2020/21 academic year, there were 21,395 undergraduates qualifying from Nursing programmes provided by 65 Higher Education providers in England

Nursing Qualifiers and Providers for 2020/21

■ Nursing Qualifiers ■ Nursing Providers

Number of all Undergraduate Nursing Qualifiers, by region



- This chart shows the number of students qualifying from nursing programmes for 2020/21 from HE nursing providers across England.
- As of 2020/21, the Midlands had the highest number of HE nursing providers (13), accounting for 4,610 new qualified nurses.

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Source: Higher Education Student Statistics: UK, 2020/21 - Student numbers and characteristics



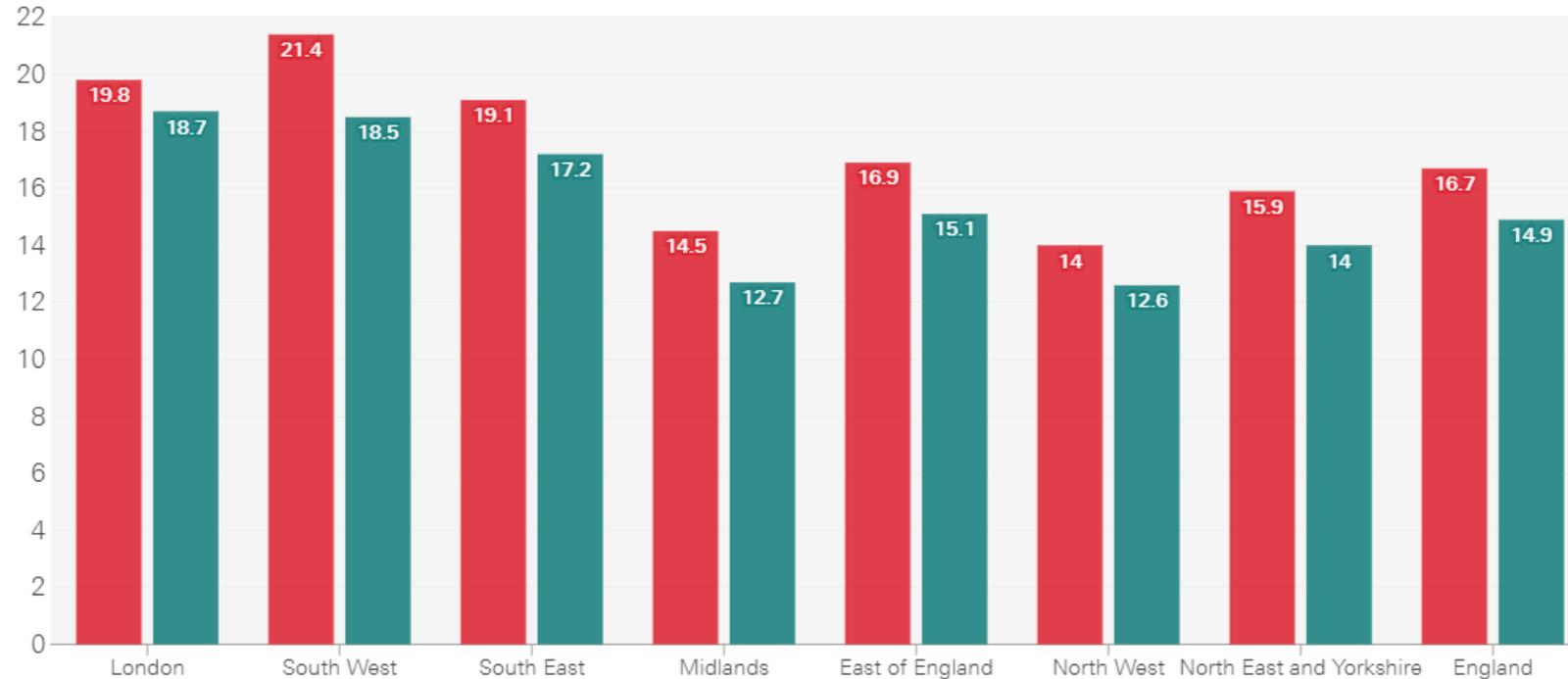
Note: HESA data does not align with UCAS data and should be looked at separately.

There is also regional variation in the ratio of the current size of the Nurse and Health Visitor workforce to the number of nurse qualifiers for 2020/21

Regional Variation in Nursing Workforce to Qualifiers

■ Nursing HC to Qualifiers ■ Nursing FTE to Qualifiers

Ratio of Current Nursing HC and FTE to 2020/21 Qualifiers, by region



- This chart shows the ratio of current nursing numbers, by headcount and FTE compared to the number of 2020/21 nursing qualifiers from providers, by region
- The current nursing workforce (HC) in England is 17 times the size of the all newly qualified nurses in England for 2020/21
- Within London, this difference is larger, with the current nursing workforce (HC) being twenty times the size of all nursing qualifiers from London HE nursing providers.

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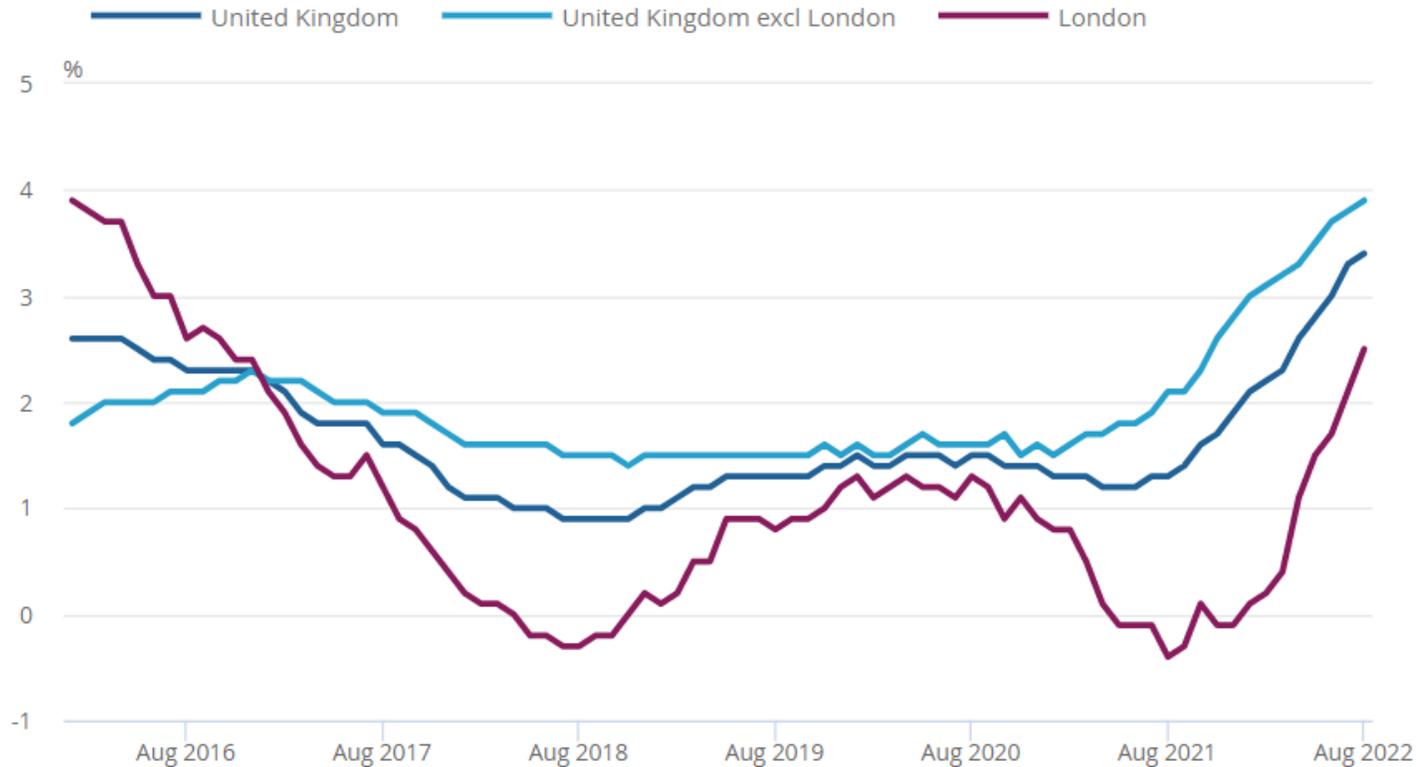
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Source: Higher Education Student Statistics: UK, 2020/21 - Student numbers and characteristics; NHS Hospital & Community Health Service (HCHS) monthly workforce statistics, May 2022

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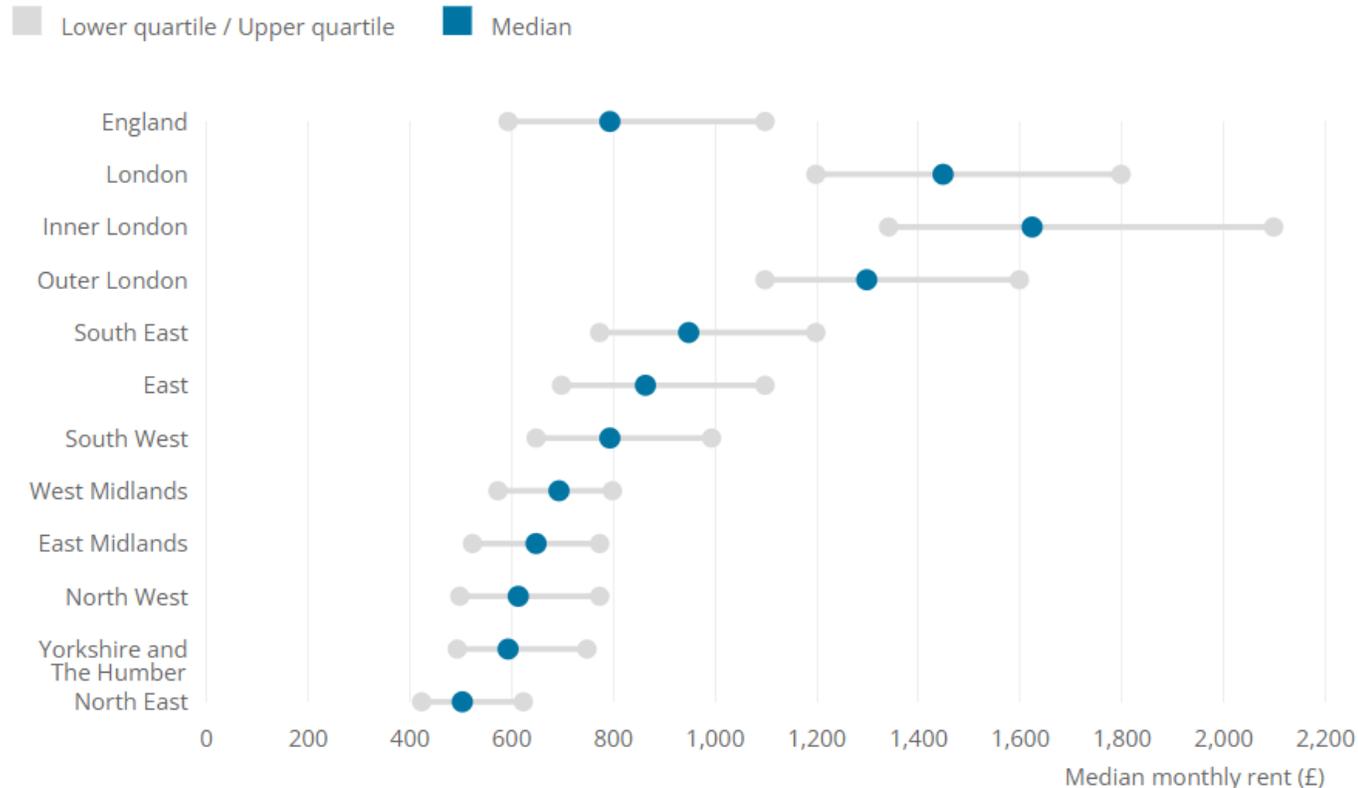
Note: HESA data does not align with UCAS data and should be looked at separately.

In the twelve months to August 2022, the annual private rental price grew to 2.5% in London, and 3.4% across the UK



- This chart shows the Index of Private Housing Rental Prices percentage change over 12 months, UK and London, January 2016 to August 2022
- While the annual private rental price for London has fallen significantly from 2016 levels of almost 4%, London has experienced its strongest annual growth over the last twelve months.
- As of August 2022, London has experienced the lowest rental price growth of any of the English regions.

The median monthly private rental price was higher in inner and outer London



- This chart shows the median and interquartile range of monthly rents for all bedroom categories, England, by region, 1 April 2021 to 31 March 2022
- In addition to having the highest median private rental price (£1,450), London also had the greatest variation within region, ranging from £1,100 in Outer London, and £2,100 in Inner London.
- The median private rental price for England overall was £795.

Key points summary

London:

- Lower staff: pop ratio in community nurses/ LD
- “Churn”- high vacancies, lower stability
- Big variation between trusts in leaver rates
- Higher reliance on international recruitment
- Has the “capital city effect”, but not as pronounced as in some other high income countries
- Relatively high rental costs

For discussion/ Q and A

- Managing “churn” [digi/ tech]
- Pay and incentives [London weighting]
- Changing patterns of international recruitment (decline in ££)
- “Growing your own”