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Affordable Housing in Planning Applications Referred to the Mayor of London

January 2026

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1. Introduction

1.1 This report analyses affordable housing data relating to residential planning applications referred to the Mayor with a resolution by the Local Planning Authority (LPA) to grant consent or approved directly by the Mayor.

1.2 This report primarily focuses on applications that were considered at 'Stage 2' and 'Stage 3' of the referral process by the Mayor in 2024. For comparative purposes, data for the period of 2011-2023 is also provided. Data was primarily sourced from GLA Stage 2 reports, and supplementary data was also derived from other sources including Stage 1 reports and the LPA committee report. Other data sources are also referred to where relevant including the Planning London Datahub.

1.3 The report relies on planning data and does not take into account residential units that have been granted consent as market housing, but which have subsequently been delivered as or converted to affordable housing.

2. Overview

2.1 The Mayor considered 140 applications at Stages 2 and 3 of the referral process in 2024. Of these, 124 applications were referred to the Mayor at Stage 2 with a LPA resolution to grant consent, subject to the completion of a Section 106 agreement. The number of applications with C3 residential accommodation was higher than in 2023, however this was lower than in previous years, and the number of consented C3 units was at its lowest level for a number of years. However, there was a significant increase in the number of purpose-built student accommodation schemes in 2024, indicating a shift in some cases from C3 residential towards these uses.

2.2 77 of the approved schemes included residential development providing a total of 27,432 residential (C3) units, of which 9,453 were affordable. This is an overall affordable percentage of 34 per cent by unit. The proportion of affordable housing secured by habitable room, which accounts for the size of homes and is the primary measure for affordable housing used in the London Plan 2021, was 39 per cent. The proportion and total number of affordable homes was lower than the previous year, which reflects the current challenging delivery and macro-economic environment, and national regulatory landscape. In 2025, the Mayor and government announced a package of measures to support housebuilding and secure higher levels of affordable housing, and more timely build out than may otherwise be the case.

2.3 The average level of affordable housing per scheme was 35 per cent by unit and 38 per cent by habitable room. While the analysis shows a lower proportion of affordable housing secured in referable applications compared with the peak of recent years, this followed a sustained period of increases since the introduction of the Mayor’s Threshold Approach in the Affordable Housing and Viability Supplementary Planning Guidance in 2017.

Table 1. Number and proportion of affordable homes in 2024 Residential Applications

Number of Affordable Units Approved	Total Number of Units Approved	Per cent of Total Units that are Affordable	Per cent of Total Habitable Rooms that are Affordable	Average Affordable per cent per Scheme (by unit)	Average Affordable per cent per Scheme (by habitable rooms)
9,453	27,432	34 per cent	39 per cent	35 per cent	38 per cent

2.4 Since 2018, 35 per cent or more affordable housing has been secured in over half of referable applications. In 2024, 73 per cent of referable schemes included 35 per cent or more affordable housing (by habitable room), and 63 per cent of eligible schemes followed the Fast Track Route.

Table 2. Proportion of Schemes Providing 35 per cent or more affordable housing and following the Fast Track Route in 2024

Year	Proportion of Schemes with 35 per cent Affordable Housing or more (by habitable room)	Proportion of Eligible Schemes Following the Fast Track Route
2024	73 per cent	63 per cent

2.5 One of the highest proportions of genuinely affordable homes was secured in 2024 for low-income households since 2011, with 58 per cent of affordable homes provided as Low Cost Rent by unit, 62 per cent by habitable rooms.

2.6 In addition to on-site affordable housing provision, £63.7m in financial contributions were secured for the delivery of affordable housing by councils from purpose-built student accommodation schemes and purpose-built sharing living schemes, and 2,220 affordable student bedspaces were secured in student accommodation schemes.

2.7 The report also considers delivery trends for residential development and identifies that the highest level of net affordable housing completions took place in 2024/25 (from referable and non-referable applications) over a 16-year period since 2008/9.

3. Referable Applications Data

3.1 Planning applications in London are submitted to the relevant LPA. Once an application has been submitted, if it meets the criteria set out in the Mayor of London Order (2008), the LPA is required to refer it to the Mayor. Residential applications are typically referable where 150 or more units are proposed or where they meet other criteria in the Order, such as in relation to height. The Mayor has six weeks to provide comments on the application, assessing whether it complies with the London Plan. This is a consultation response known as 'Stage 1'.

3.2 Once the LPA has decided whether to grant or refuse permission, it is then required to refer the application to the Mayor for his final decision, known as a Stage 2 referral. The Mayor has 14 days to make a decision to allow the LPA's decision to stand, to direct refusal, or to take over the application, becoming the LPA. Where the Mayor becomes the LPA, a hearing report is produced to inform the Mayor when making his decision. This is known as a Stage 3 report.

3.3 The data referred to in this report is primarily taken from reports for schemes that were considered by the Mayor at Stage 2 (stage 2 reports). Where the Mayor became the LPA, the Stage 3 report has been used. Data from Stage 1 reports has also been referred to in some sections. Stage 2 and 3 reports have been used as the primary source of data because these provide information that is available to the Mayor to inform his decision making and they reflect any changes to the scheme that may have occurred during the application process.

3.4 The data comprises of referable applications which deliver self-contained C3 use residential units which form part of a residential-led or mixed-use development. Affordable housing delivery is reported on a unit and habitable room basis, and as a proportion of total residential units[1]. The level of financial contributions for affordable housing delivery and affordable student accommodation has also been recorded.

3.5 The report relies on planning data which does not take into account residential units that have been granted consent as market housing, but which have subsequently been delivered as, or converted to, affordable housing. This may occur for a range of reasons such as a developer wishing to reduce market risk and generate cashflow by selling units permitted as market housing to a council or Registered Provider (RP) for delivery as affordable housing. In some cases, the proportion of affordable housing in a development may also be increased in RP or council-led schemes after planning consent has been granted or more affordable tenures may be provided.

3.6 The data also does not include acquisitions of market housing which have been converted to affordable housing. Planning consent is not normally required for

[1] Due to the nature of outline applications, indicative figures have been used where available as the precise number of units and habitable rooms will only become apparent at the reserved matters stage.

these changes and so these are not included in planning data. As such, the data is different from the measure of affordable housing delivery used in the Mayor's London Housing Strategy, which also includes affordable housing in non-referable planning applications. The data also does not take into account any additional affordable housing units, changes in affordable tenure or contributions secured through viability review mechanisms after planning consent has been granted.

3.7 Data from earlier in the reporting period was recorded in accordance with accepted methodologies at that time. This report and the dataset, which is available on the London Datastore, should be considered in that context. In the interest of data consistency, Section 73 applications (which discharge or amend a planning condition, and issue a new planning permission) have been omitted to limit duplication within the dataset[2].

3.8 The dataset comprises of an extensive amount of information and every effort has been made to minimise errors, however if any are identified, please notify the GLA at planningsupport@london.gov.uk.

[2] For a number of years S73 applications were typically used to increase the number of residential units and affordable homes permitted on a site. Since 2023, some applicants have used S73 applications as a route to enable a viability-based downwards review of affordable housing following the grant of the main consent. However, no referable S73 applications reducing affordable housing were granted in 2024.

4. Number of Applications by Calendar Year

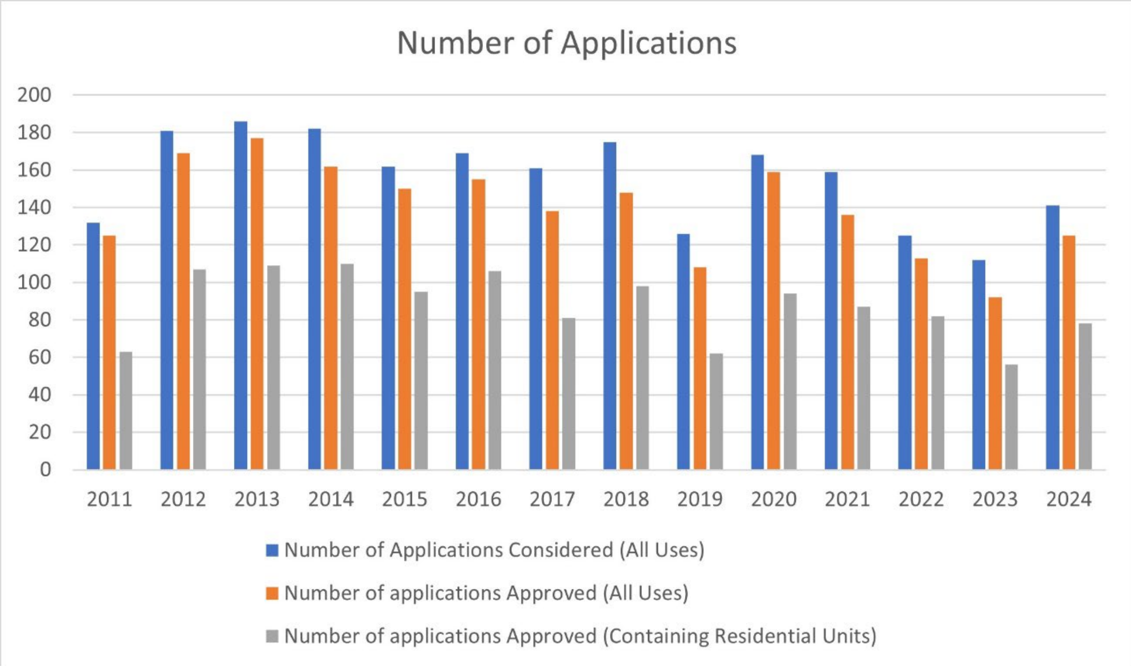
4.1 The chart below displays the number of planning applications referred to the Mayor, and the number with a resolution to grant, or that were approved directly by the Mayor between 2011 and 2024[3]. It also shows the number of applications that included residential units with a resolution to grant or that were approved directly.

4.2 Given the scale of schemes that are referred to the Mayor, the decision to develop a site and to submit a planning application may be taken several, or in some cases many years, before it is referred. The number of schemes referred to the Mayor and considered at Stage 2/3 each year fluctuates because of this and due to a range of reasons such as varying market conditions, wider macro-economic and political factors. The timing of referral is also influenced by the extent to which proposals accord with the Development Plan and whether there are outstanding issues to address, as well as the resourcing available to planning authorities to assess and refer strategic applications which are often complex and require specialist advice.

4.3 The size of development proposals also varies from scheme to scheme and there are years where a smaller number of applications are referred to the Mayor, but these proportionately account for a larger number of residential units and vice versa. Generally, the trend in recent years has been for fewer applications but sites being larger and proposing a higher number of residential units on average.

4.4 The chart shows that 140 applications were considered in 2024, 124 applications (All Uses) had a resolution to grant consent and 77 of those applications proposed residential (C3 use) units. The number of residential applications was higher than in 2023, however this was lower than in previous years, and the number of consented units was at its lowest level for a number of years.

[3] Two schemes were approved in 2024 at Stage 3 by the Mayor following call-in. Aberfeldy Estate was approved on 26th January 2024 and Springfield Hospital Phase 2b was approved on 8th October 2024.



4.5 However, there was a further increase in the number of purpose-built student accommodation and purpose-built shared living led schemes in 2024, indicating a shift in some cases from C3 residential towards these uses. In 2024, 9,965 PBSA units were approved by the Mayor at Stage 2 – a significant increase from 2023 (1,591) and 2022 (6,263). While the number of co-living units approved in 2024 at 1,272 units is slightly lower than 2023 (1,466), both years are significantly higher than the three years before, which averaged 369 units.

5. Affordable Housing Analysis by Unit and Habitable Room

Total Affordable Housing Units as a Proportion of Total Residential Units

5.1 The table below compares data on affordable housing provision in Stage 1 referrals with the same data for schemes when they were considered at Stage 2 or approved directly by the Mayor at Stage 3. This indicates that there was an increase in the percentage of affordable housing between Stage 1 and Stage 2/3 in almost every year. It does not however show changes that took place between pre-application stage or submission of the application and Stage 1, and so may understate the change in affordable housing provision over the course of the application process. The difference between the level of affordable housing at Stage 1 and Stage 2 has narrowed in recent years as more schemes have followed the Fast Track Route and provided a higher level of affordable housing from the outset.

5.2 In 2024, 9,453 affordable homes were secured through referable applications, representing 34 per cent by units. This is a reduction in the number and overall affordable percentage between 2019 and 2023 which was 37-38 per cent, a trend which we also expect to be reflected in 2025 data. The lower affordable housing provision reflects the current challenging delivery and macro-economic environment, and national regulatory landscape. In 2025, the Mayor and government announced a package of measures to support housing building and secure higher levels of affordable housing, and more timely build out than may otherwise be the case. In 2024 one of the largest proportions of affordable homes secured as Low Cost Rent housing over the data period was secured for households with lower incomes, despite the wider challenges facing affordable housing delivery. This is considered further in Section 7.

Table 3. Number of Affordable and Total Residential (Market and Affordable) Units Per Year

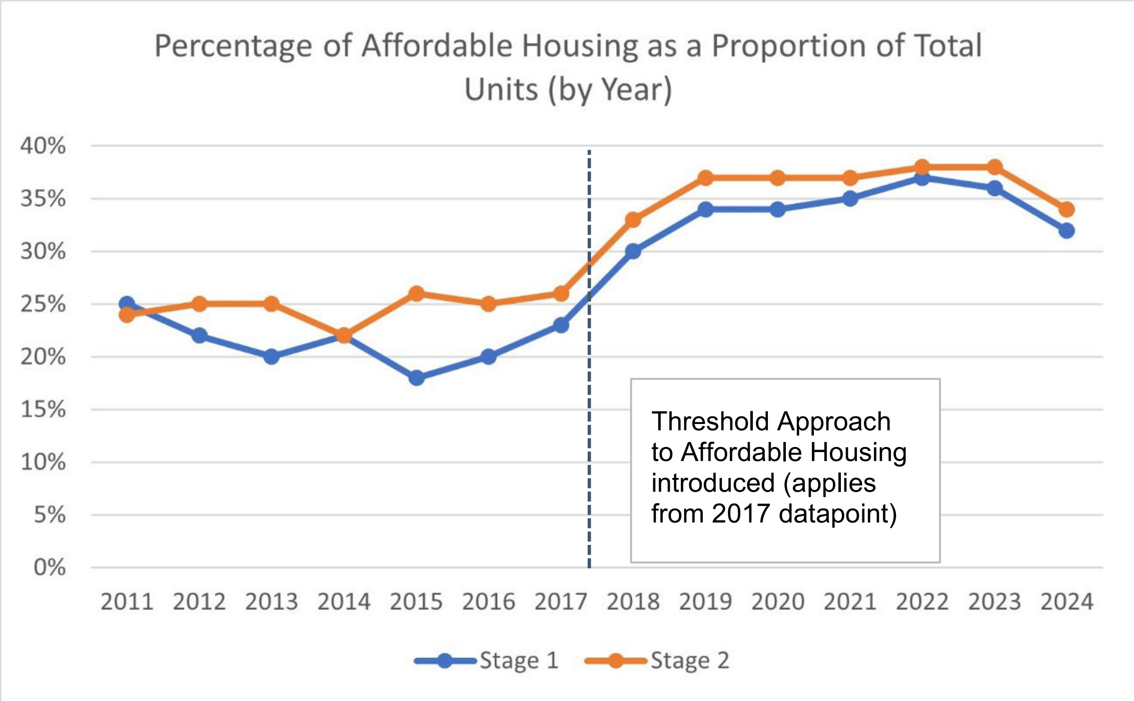
Year	Stage 1 Affordable Housing Provision by Unit	Stage 2/3 Affordable Units[4]	Stage 2/3 Total Units	Stage 2/3 Affordable Housing Provision by Unit	Percentage Change from Stage 1 to Stage 2/3
2011	25 per cent	6,900	29,120	24 per cent	-1 per cent
2012	22 per cent	13,068	52,932	25 per cent	3 per cent
2013	20 per cent	9,863	40,058	25 per cent	5 per cent

[4] In some instances, a new application may be granted on a site with an existing consent. In these cases, the new consent has been recorded to ensure that the percentage figures for the latest year reflect the proportion of affordable housing secured in that year. This may result in some duplication in unit and habitable room figures, however, to limit this, S73 applications for amendments to existing applications have been excluded even where these comprise of additional units.

Year	Stage 1 Affordable Housing Provision by Unit	Stage 2/3 Affordable Units[4]	Stage 2/3 Total Units	Stage 2/3 Affordable Housing Provision by Unit	Percentage Change from Stage 1 to Stage 2/3
2014	22 per cent	10,026	44,982	22 per cent	0 per cent
2015	18 per cent	13,929	53,425	26 per cent	8 per cent
2016	20 per cent	8,606	34,807	25 per cent	5 per cent
2017	23 per cent	6,188	23,784	26 per cent	3 per cent
2018	30 per cent	14,141	42,762	33 per cent	3 per cent
2019	34 per cent	10,935	29,631	37 per cent	3 per cent
2020	34 per cent	14,337	38,865	37 per cent	3 per cent
2021	35 per cent	11,763	31,859	37 per cent	2 per cent
2022	37 per cent	18,043	46,875	38 per cent	1 per cent
2023	36 per cent	11,725	30,609	38 per cent	2 per cent
2024	32 per cent	9,453	27,432	34 per cent	2 per cent

Note: Stage 2/3 refers to a resolution to grant or direct Mayoral approval.

5.3 The chart below indicates that the percentage of affordable housing as a proportion of total residential units increased significantly following the introduction of the Threshold Approach through the Mayor’s Affordable Housing and Viability Supplementary Planning Guidance (SPG) in 2017. The Threshold Approach to affordable housing was later included the London Plan (2021). Despite the lower proportion of affordable housing secured in 2024, this remains higher than in the years prior to the threshold approach.



<u>Affordable Housing as a Proportion of Total Residential Accommodation (by Habitable Room)</u>

5.4 Affordable housing by habitable room is the primary measure used within the London Plan 2021 because this accounts for the size of affordable homes as well as overall provision. The table below shows data on affordable housing provision by habitable room for the years 2019 to 2024[5]. The percentage of affordable housing provision by habitable room as a proportion of total habitable rooms in 2024 was 39 per cent.

Table 4. Total Numbers of Affordable and Residential (Market and Affordable) Habitable Rooms between 2019 and 2024

Year	Affordable Habitable Rooms	Total Habitable Rooms	Affordable Housing Provision by Habitable Room
2019	27,323	71,260	38 per cent
2020	32,147	77,617	41 per cent
2021	30,311	78,678	39 per cent

[5] Total habitable room data is not available for some 2019, 2020 and 2021 schemes, and so the figures underestimate the total number of affordable and overall habitable rooms, however sufficient data is available to indicate the percentage of affordable housing provision. Comprehensive data for the previous years is not available and so has not been used.

Year	Affordable Habitable Rooms	Total Habitable Rooms	Affordable Housing Provision by Habitable Room
2022	56,127	131,201	43 per cent
2023	35,570	77,377	46 per cent
2024	30,073	76,905	39 per cent

5.5 In line with previous years, the level of affordable housing measured by habitable room is higher than the percentage by unit in 2024, which indicates that the average size of affordable homes has increased over the recent years.

Average Percentage of Affordable Housing Per Scheme (by unit)

5.6 The table below shows the average percentage of affordable housing by scheme on a per unit basis[6]. As above, this has generally increased between Stage 1 and Stage 2, although the difference has narrowed in recent years as more schemes have followed the Fast Track Route and provided a higher level of affordable housing from the outset. In 2024, an average of 35 per cent affordable housing per scheme was secured at Stage 1 and Stage 2, which is a reduction compared with the previous five years.

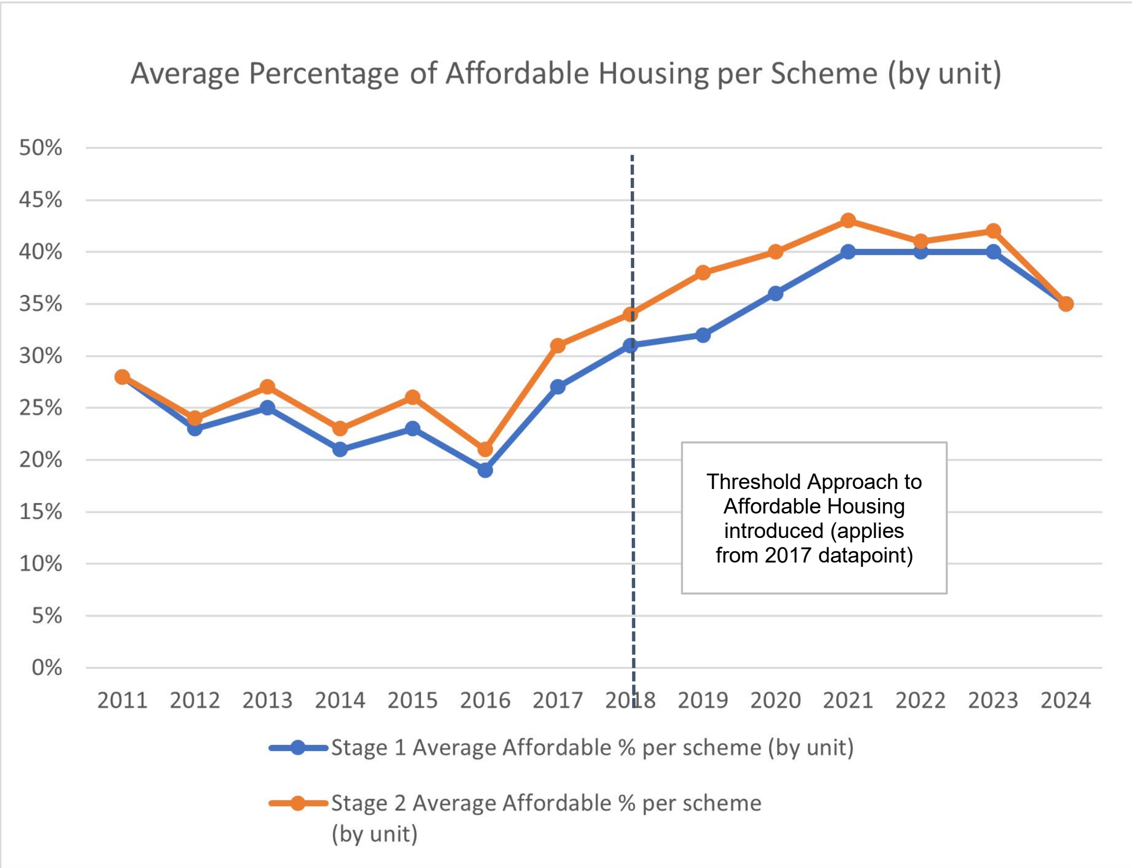
Table 5. Average Percentage of Affordable Housing per Scheme (by unit)

Year	Stage 1 Average Affordable Percentage per scheme (by unit)	Resolution to grant or approved directly (Stage 2/Stage 3) Average Affordable Percentage per scheme (by unit)
2011	28 per cent	27 per cent
2012	23 per cent	24 per cent
2013	25 per cent	26 per cent
2014	21 per cent	23 per cent
2015	23 per cent	26 per cent
2016	19 per cent	22 per cent
2017	27 per cent	31 per cent

[6] For mixed use schemes consisting of C3 residential and PBSA/Co-Living elements, the equivalency ratio outlined in Policy H1 4.1.9 in the London Plan is adopted. Under this approach, two and a half student bedrooms are counted as a single home and one point eight co-living units are counted as a single home.

Year	Stage 1 Average Affordable Percentage per scheme (by unit)	Resolution to grant or approved directly (Stage 2/Stage 3) Average Affordable Percentage per scheme (by unit)
2018	31 per cent	34 per cent
2019	32 per cent	38 per cent
2020	36 per cent	40 per cent
2021	40 per cent	43 per cent
2022	40 per cent	41 per cent
2023	40 per cent	42 per cent
2024	35 per cent	35 per cent

5.7 The chart below shows that the average level of affordable housing secured per scheme has increased significantly following the introduction of the Threshold Approach in 2017. As with the graph above, despite the lower proportion of affordable housing secured in 2024, this remains higher than in the years prior to the threshold approach.



Average Percentage of Affordable Housing Per Scheme (by Habitable Room)

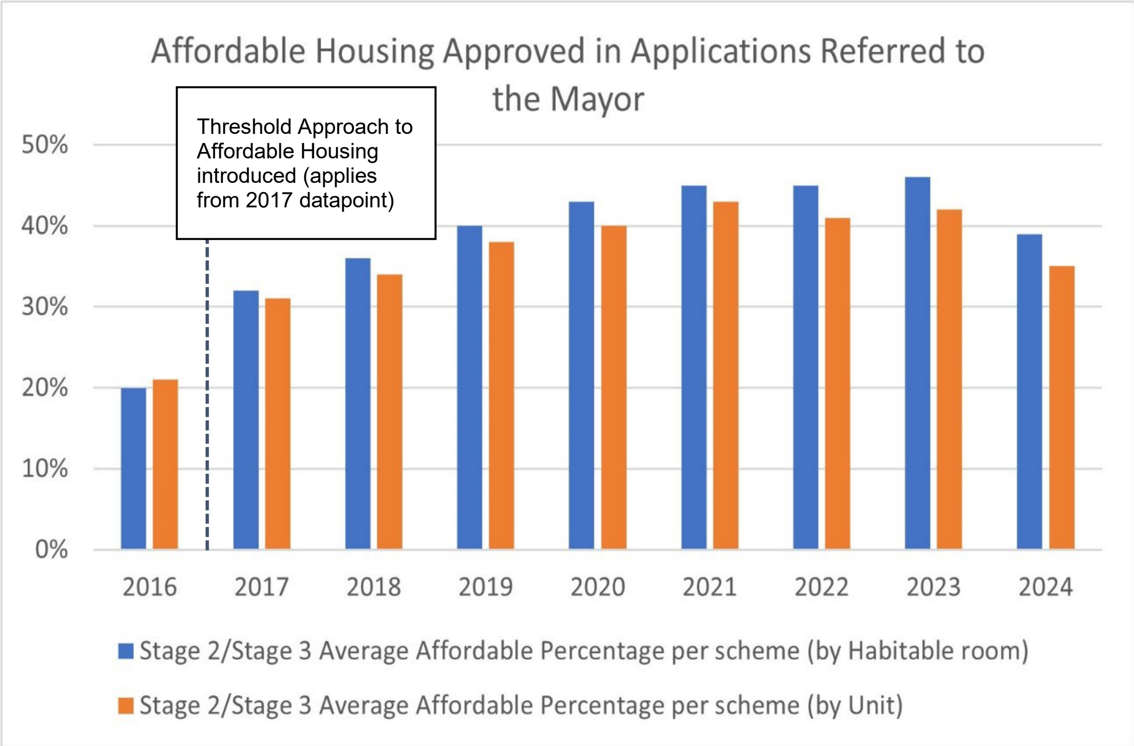
5.8 The table below shows the average percentage of affordable housing per scheme on a habitable room basis for the years 2016-2024[7]. The average affordable housing percentage per scheme was 38 per cent by habitable room in 2024.

Table 6. Average Percentage of Affordable Housing Per Scheme (by Habitable Room)

Year	Resolution to grant or approved directly (Stage 2/Stage 3) Average Affordable Percentage per scheme (by habitable room)
2016	21 per cent
2017	32 per cent
2018	35 per cent
2019	39 per cent
2020	42 per cent
2021	45 per cent
2022	45 per cent
2023	46 per cent
2024	38 per cent

5.9 The chart below shows the average percentage of affordable housing per scheme by unit and habitable room:

[7] Comprehensive information for the percentage of affordable housing by habitable room is not available for earlier years.



Affordable Housing Approved in Applications Referred to the Mayor
Threshold Approach to Affordable Housing introduced (applies from 2017 datapoint)
50%
40%
30%
20%
10%
0%
2016
2017
2018
2019
2020
2021
2022
2023
2024
Stage 2/Stage 3 Average Affordable Percentage per scheme (by Habitable room)
Stage 2/Stage 3 Average Affordable Percentage per scheme (by Unit)

6. Schemes Providing 35 per cent or more Affordable Housing and Following the Fast Track Route

6.1 The table below shows the number of cases providing 35 per cent or more affordable housing and that followed the Fast Track Route in the years 2018 to 2024[8]. These are the complete calendar years in which the Mayor's Threshold Approach has been in operation since adoption of the Mayor's Affordable Housing and Viability SPG in August 2017 and publication of the Draft London Plan in December 2017.

Table 7. Schemes Providing 35 per cent or more Affordable Housing and that follow the Fast Track Route

Year	Total number of approved residential applications	Number of schemes with 35 per cent affordable housing or more (by habitable room)	Percentage of schemes with 35 per cent affordable housing or more (by habitable room)	Number of schemes eligible for Fast Track Route	Number of Fast Track Route schemes	Percentage of eligible schemes following the Fast Track Route
2018	98	52	53 per cent	82	22	27 per cent
2019	62	50	81 per cent	54	21	39 per cent
2020	94	74	79 per cent	83	41	49 per cent
2021	87	72	83 per cent	80	49	61 per cent
2022	82	69	84 per cent	65	43	66 per cent
2023	56	43	77 per cent	40	21	53 per cent
2024	77	56	73 per cent	70	44	63 per cent

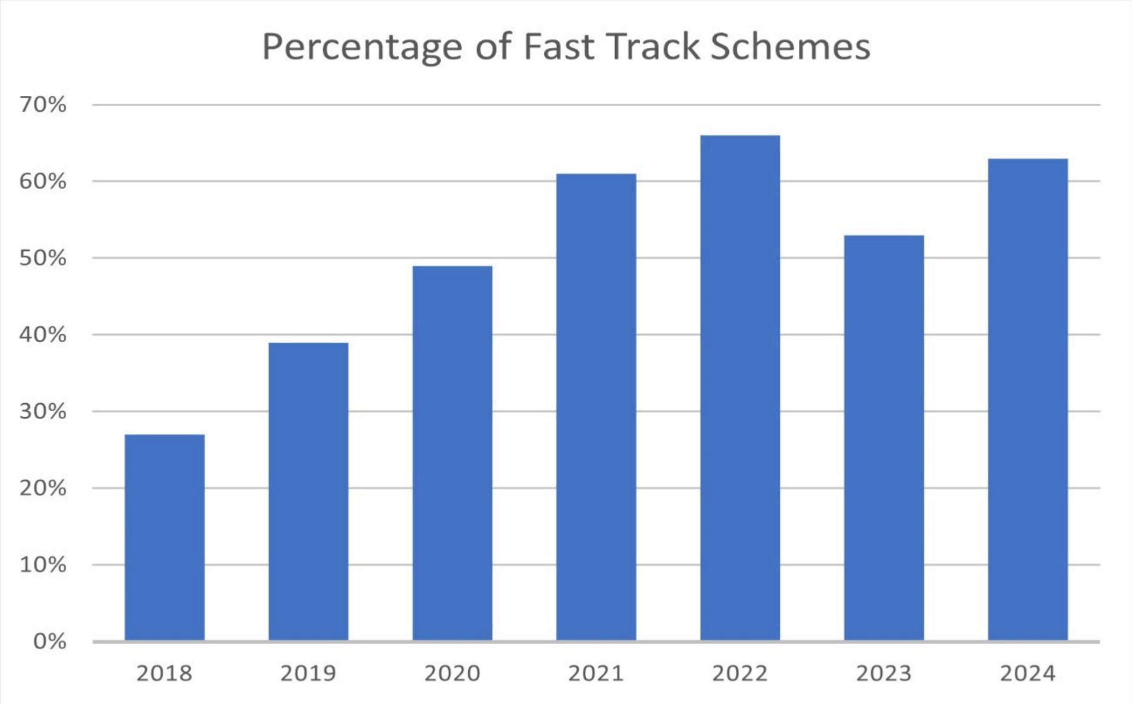
6.2 Since 2018, more than half of the schemes have provided 35 per cent or more affordable housing. 73 per cent of referable schemes were approved in 2024 with 35 per cent or more affordable housing, and 63 per cent of eligible schemes[9] followed the Fast Track Route.

6.3 The chart below shows the percentage of eligible schemes that have followed the Fast Track Route since the introduction of the Threshold Approach. Although the number and proportion of schemes following the Fast Track Route

[8] See previous footnote.

[9] This excludes estate regeneration and co-living (LPBSL) schemes, which are required to follow the Viability Tested Route in accordance with London Plan Policy H8 and H16.

increased in 2024 compared with 2023, as noted in Table 3 above, the total number of affordable homes secured in 2024 was lower than the previous year.



6.4 The table below shows the average level of affordable housing in schemes that have followed the Fast Track Route and Viability Tested Route between 2018 and 2024 where these were eligible to follow the Fast Track Route[10]. Fast Track Route schemes secured a higher proportion of affordable housing on average, compared to Viability Tested schemes.

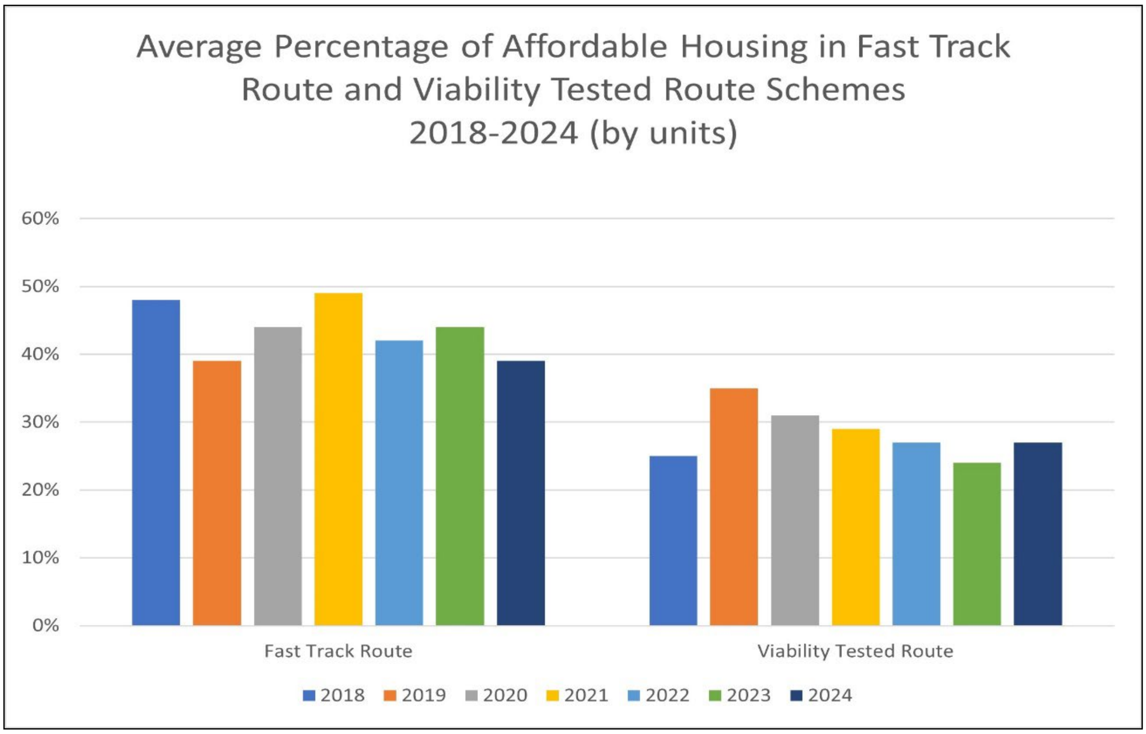
Table 8. Average Percentage of Affordable Housing in Fast Track Route and Viability Tested Route Schemes 2018-2023 (by units)

Year	Fast Track Route	Viability Tested Route
2018	48 per cent	25 per cent
2019	39 per cent	35 per cent
2020	44 per cent	31 per cent
2021	49 per cent	29 per cent
2022	42 per cent	27 per cent
2023	44 per cent	24 per cent

[10] This excludes estate regeneration schemes, which are required to follow the Viability Tested Route in accordance with London Plan Policy H8.

Year	Fast Track Route	Viability Tested Route
2024	39 per cent	27 per cent

6.5 The chart below shows the average level of affordable housing secured in Fast Track Route schemes and Viability Tested Route schemes respectively. The average proportion of affordable housing in Fast Track schemes is consistently higher than those that follow the Viability Tested Route.



6.6 Between 2022 and 2024, the average level of affordable housing in referable applications on private land that were approved through the Viability Tested Route was 20 per cent per scheme by habitable rooms[11].

6.7 Analysis of the time between Stage 1 and Stage 2 Reports also indicates that the Threshold Approach has had a material impact on the time taken to determine planning applications, with Fast Track Schemes progressing to Stage 2 on average three months quicker than Viability Tested schemes between 2018 – 2024.

6.8 Applications assessed under the Viability Tested Route took on average a quarter of the time longer than Fast Track Route schemes to progress to Stage 2. This does not take into account further time savings at pre-application stage, pre-Stage 1, and post Stage 2.

[11] These exclude schemes that progressed through the Fast Track Route, estate regeneration schemes, which are ineligible for the Fast Track Route and schemes on industrial or public land that are subject to a 50 per cent threshold.

7. Tenure of Affordable Housing

7.1 The following table shows the affordable housing tenure split, by unit, for Low Cost Rent housing and Intermediate Housing between 2011 and 2024[12]. These comprise of the following affordable housing types:

- Low Cost Rent: Social Rent, London Affordable Rent (LAR), Other Affordable Rent products (including borough specific products such as Tower Hamlets Living Rent) available to low-income households.
- Intermediate: London Living Rent, London Shared Ownership, Discounted Market Rent, Discounted Market Sale and other products that meet the London Plan affordability and eligibility criteria for intermediate housing.

7.2 In 2024, 58 per cent of affordable homes were Low Cost Rent (5,479 units) and 42 per cent were Intermediate (3,974 units). The tenure split by habitable room in 2024 was 62 per cent Low Cost Rent (18,541 habitable rooms) and 38 per cent Intermediate housing (11,532 habitable rooms).

7.3 This is amongst the largest proportion of Low Cost Rent homes secured since data was first collated in 2011, which supports national and Mayoral objectives to prioritise the delivery of homes to address the significant and increasing need for more social and low-cost rent homes.

Table 9. Affordable Housing Tenure Split (by unit)

Year	Low Cost Rent Units	Low Cost Rent Units as a per cent of Total Affordable Units	Intermediate Units	Intermediate Units as a per cent of Total Affordable Units
2011	3,917	59 per cent	2,738	41 per cent
2012	7,757	60 per cent	5,248	40 per cent
2013	5,073	57 per cent	3,843	43 per cent
2014	5,642	56 per cent	4,373	44 per cent
2015	5,803	55 per cent	4,826	45 per cent
2016	3,619	46 per cent	4,225	54 per cent
2017	1,959	32 per cent	4,229	68 per cent
2018	6,788	48 per cent	7,353	52 per cent

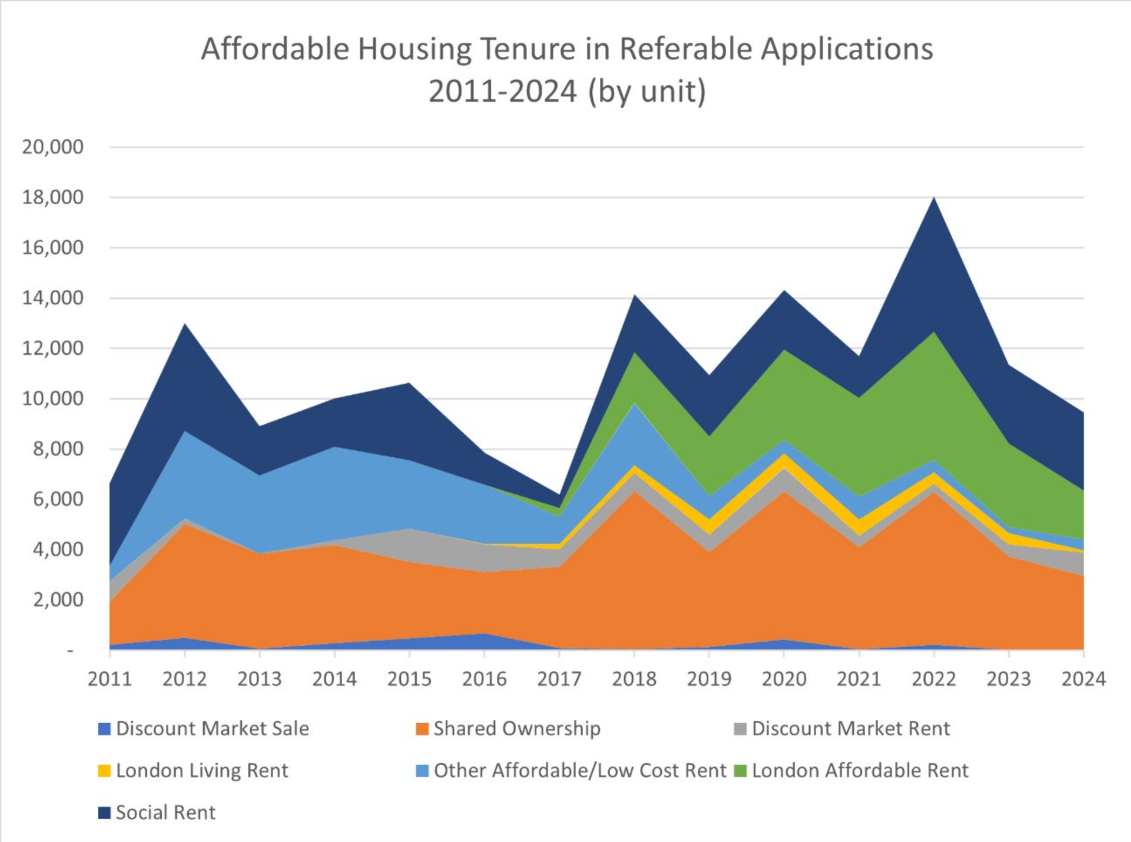
[12] This uses information available in Stage 2/3 reports, however, for some years, data availability is more limited and so this may understate the total number of affordable housing units.

Year	Low Cost Rent Units	Low Cost Rent Units as a per cent of Total Affordable Units	Intermediate Units	Intermediate Units as a per cent of Total Affordable Units
2019	5,739	52 per cent	5,196	48 per cent
2020	6,495	45 per cent	7,842	55 per cent
2021	6,490	55 per cent	5,207	45 per cent
2022	10,963	61 per cent	7,080	39 per cent
2023	6,684	57 per cent	5,041	43 per cent
2024	5,479	58 per cent	3,974	42 per cent

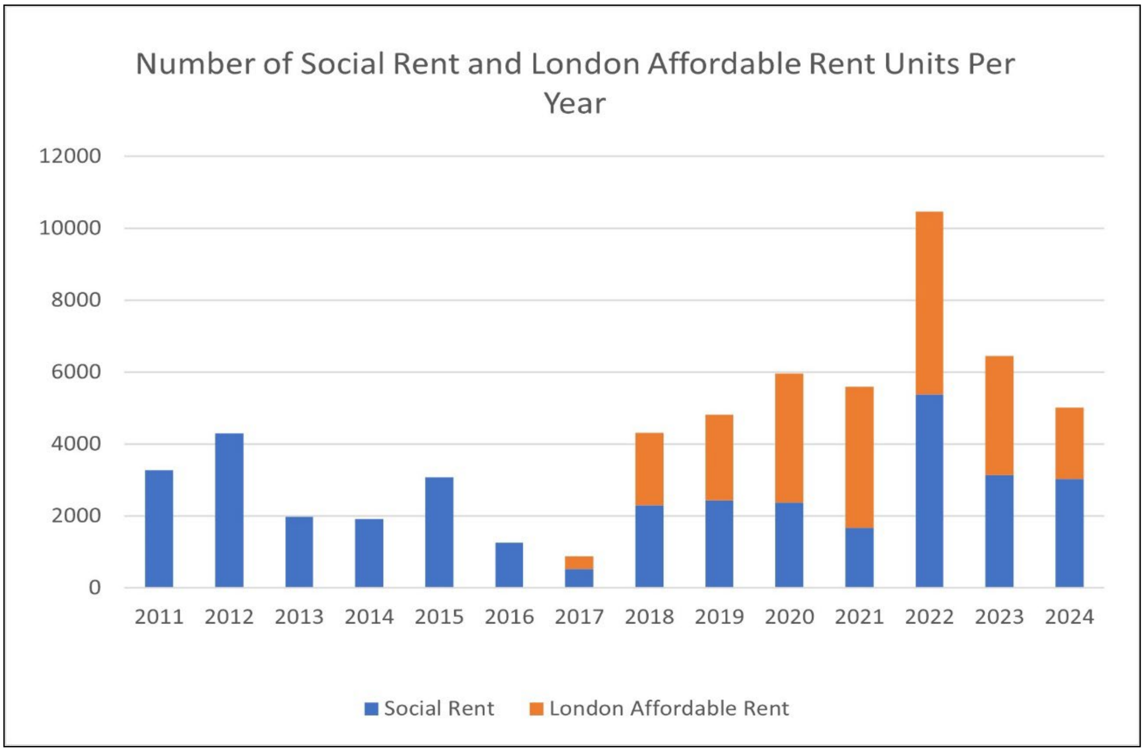
7.4 The following chart shows the number of affordable homes by tenure, for schemes with a resolution to grant or approved directly[13]. This indicates that the total number of affordable homes increased significantly from 2018. Between 2012 and 2016, the majority of Low Cost Rent housing was provided as affordable rent at up to 80 per cent of market rent. Since 2018, the number of Low Cost Rent homes secured as Social Rent or London Affordable Rent, which are charged at much lower rents, has increased significantly[14].

[13] See previous footnote for information regarding data availability.

[14] Funding for social rent was not available through the 2016-2023 Affordable Homes Programme (AHP). The Mayor does not consider that affordable rent at 80 per cent of market rent is affordable, and so introduced London Affordable Rent at significantly lower rents which are closer to rent cap figures for social rent. The 2021-26 AHP and the new Social and Affordable Homes Programme 2026-2036 prioritise the delivery of social rent.



7.5 The following chart shows the number of homes secured as Social Rent and London Affordable Rent.



8. Student Accommodation, Purpose-Built Shared Living and Financial Contributions

8.1 Analysis of referable schemes indicates a shift towards purpose-built student accommodation (PBSA) and purpose-built shared living (Co-Living) from C3 residential units as the dominant use in a number of cases.

8.2 18 schemes approved in 2024 included student accommodation comprising 9,965 student bed spaces which is a significant increase on 2023 (1,591) and 2022 (6,263). 2,220 of the bed spaces were secured as affordable student accommodation, equating to c. 22 per cent affordable student accommodation[15]. 8 schemes consisted of student accommodation only, 8 schemes included on site C3 affordable housing, and 2 schemes are larger mixed-tenure schemes. £41.2m in financial contributions were secured from PBSA schemes for the delivery of affordable housing by councils within their affordable homes programmes.

8.3 Three schemes approved in 2024 included purpose-built shared living, comprising 1,272 co-living units. This is slightly lower than in 2023 (1,466 co-living units), however both years are significantly higher than the previous three years which averaged 369 co-living units). Up to £22.5m in financial contributions were secured for affordable housing in 2024 from co-living[16], in addition to 167 affordable C3 units, amounting to an equivalent average of 39 per cent by habitable rooms.

[15] 1 Portal Way is consented with two options for the 384 units in Building F to either be used as student accommodation, with 35 per cent affordable student accommodation or co-living with £22.5m payment-in-lieu.

[16] See previous footnote.

9. Housing Delivery: From Planning Approval to Build-Out

Affordable Housing and Net Additional Residential Approvals

9.1 This report shows that the level of affordable housing approved in planning applications referred to the Mayor has increased significantly since the introduction of the Threshold Approach in the Mayor's Affordable Housing and Viability Supplementary Planning Guidance and Draft London Plan in 2017. In addition, GLA data shows that affordable housing provision in all schemes with ten or more residential units increased from 24 per cent in 2016 to an average of 35 per cent between 2021 and 2023. However, in 2024 this reduced to 21 per cent, and the latest figure for net residential approvals indicates a fall to 49,535, the lowest level since 2012/13[17].

9.2 As noted above, there have been significant changes to market conditions in recent years, in particular due to higher build costs, interest rates and changes to the national regulatory landscape. This has affected overall housing delivery and the level of affordable housing secured in 2024.

9.3 In October 2025, the Mayor and the government announced a package of measures to support housebuilding to encourage schemes to come forward, and existing schemes to progress, in the near-term, while providing a higher level of affordable housing and more timely build out than may otherwise have been the case.

Residential Starts and Completions

9.4 In 2024/25, 21,665 net residential starts are currently recorded on the Planning London Datahub, of which 6,120 were affordable homes (c. 28 per cent). This is down from 2023/24 (27,386) and is a notable reduction from 2022/23 (48,962)[18].

9.5 The Planning London Datahub also records 31,770 net completions in 2024/25. This is above the level of completions between 2004/5 and 2015/16, which ranged from 18,793 to 31,377, but below the peaks of 2016/17 (39,600) and 2021/22 (38,716). 9,918 affordable housing completions were recorded in 2024/5 which is the highest figure for 16 years since 2008/9[19].

9.6 The latest ONS net additional dwellings figure for London is 32,678 in 2024/5 which is slightly higher than the previous year, but below those recorded between 2015/16 and 2022/23. The highest figure recorded by the ONS in the period was 45,676 in 2019/20 which, based on available information, is likely to be the highest year of annual completions since the 1930s. Both datasets show

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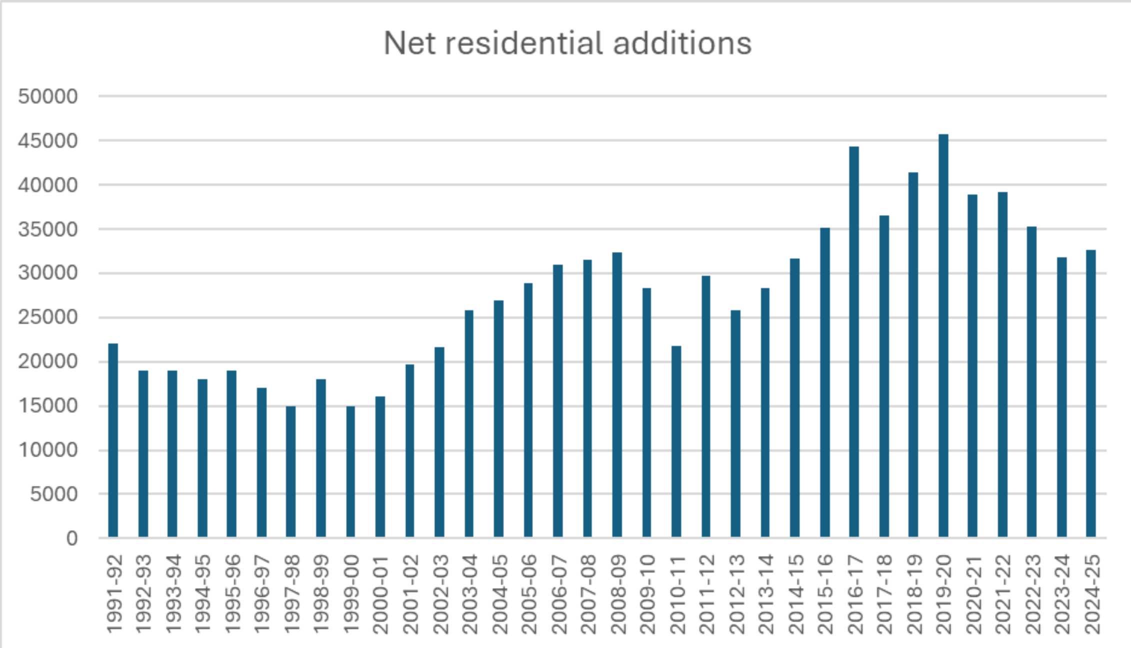
[17] Planning London Datahub, December 2025.

[18] Planning London Datahub, December 2025.

[19] This excludes affordable housing delivery that is not included in planning data, such as grant funded homes that are switched to affordable housing after planning consent has been granted and existing market units that are converted to affordable housing.

that net residential completions in London have been higher over the last 10-11 years compared with the period between 1991/92 and 2013/14: the latest five-year average is more than 35,000, compared with an average of 25,000 between 1991/2 and 2017/18.



9.7 The reduction in starts and completions figures in 2023 and 2024 also reflects the current challenging delivery environment for London's housing sector which has made it harder to translate planning approvals into delivery, compared with the previous period.

9.8 The build out of approved homes is influenced by a range of factors that extend beyond the planning process, including land ownership, the scale and type of development, the type of developer (e.g. private, registered provider of social housing, public authority), infrastructure delivery, market conditions including changes in residential values and development costs, and the extent of tenure diversity. Recent shortages in construction workers may also slow down the rate at which approved homes are being delivered. Recent market conditions including inflation and higher interest rates following the Covid-19 Pandemic, the war in Ukraine and the 2022 mini budget, as well as regulatory uncertainty relating to requirements for second staircases, have resulted in a reduction in housing delivery. However, as shown above, even in more buoyant economic conditions, completions did not increase at the same rate as the residential pipeline, which is considered further below.

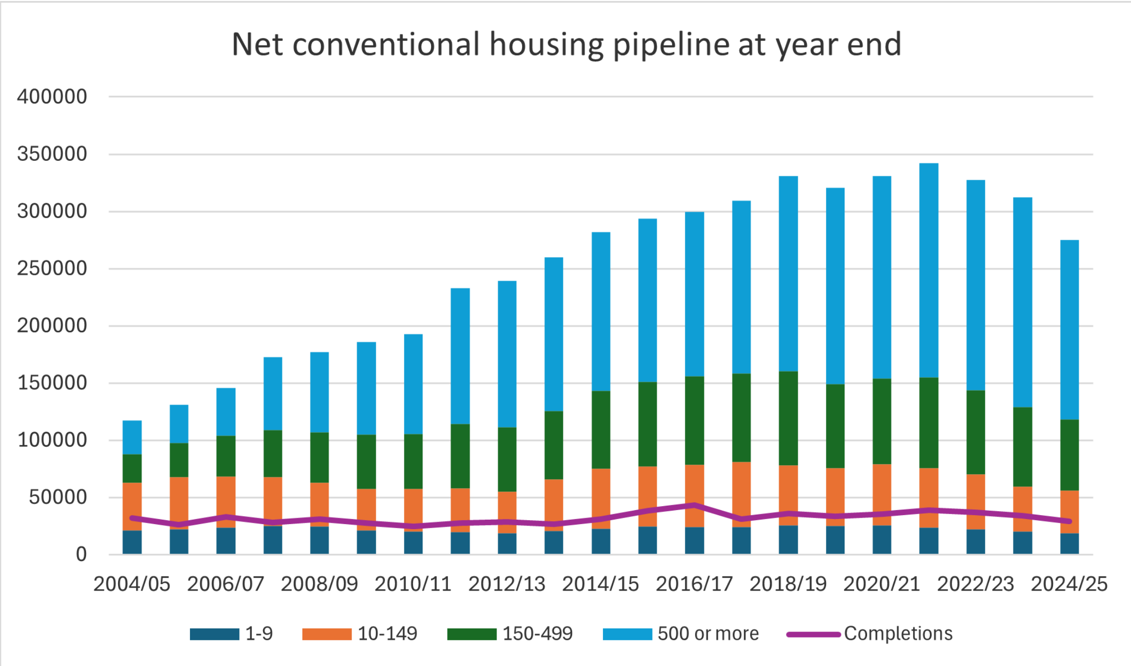
Net Residential Planning Pipeline

9.9 GLA figures show that as of March 2025, London's net residential pipeline stood at 313,373 homes (all schemes), of which 277,552 are conventional homes and 74,762 (c.27 per cent) are affordable[20]. The net conventional

[20] Planning London Datahub, December 2025

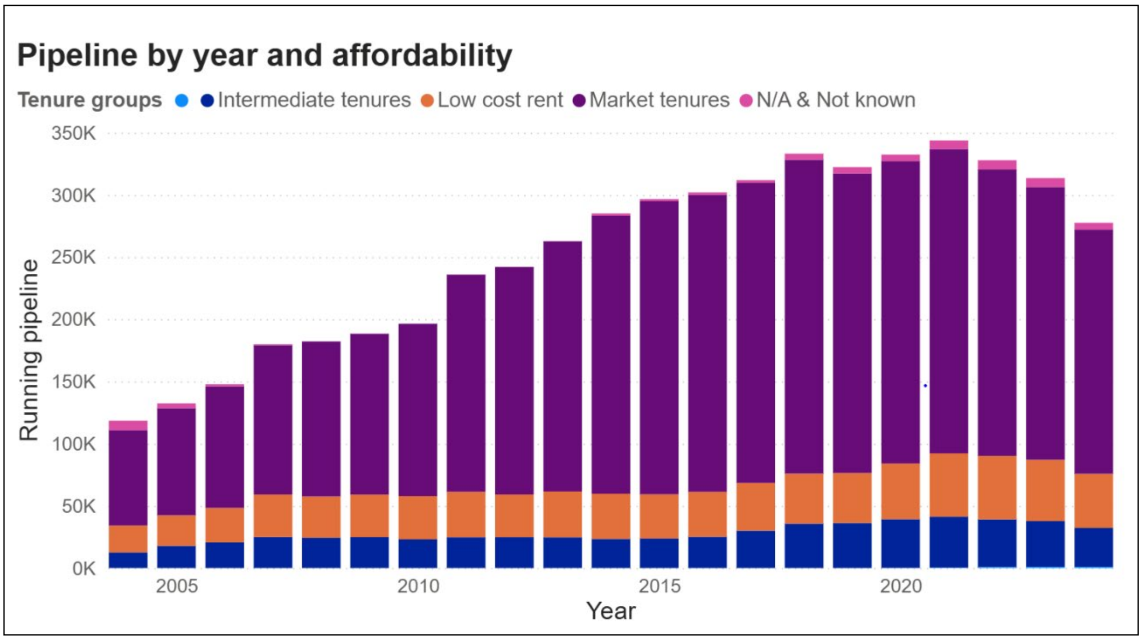
pipeline is down on previous years (313,486 in 2023/4, 327,817 in 2022/3), however remains much higher than earlier in the data period, and more than twice the figure recorded for 2003/4 (118,450). Compared with earlier years, the latest pipeline figure is also much higher than the level of completions, which has remained relatively unchanged over the period when compared with the pipeline.

9.10 The majority of units in the pipeline (c. 71 per cent) are in schemes with 150 or more homes that would be referable to the Mayor, and the most significant growth since 2004/5 has been in large scale developments of 500 or more units. These now account for over 159,000 homes which is 58 per cent of the pipeline (compared with less than 30,000 in 2004), and within this, 98,247 homes (35 per cent of the pipeline) are in schemes of 1,000 or more units. Smaller schemes of fewer than 150 homes account for a much smaller proportion of the pipeline in 2024 (20 per cent), falling to around 55,700 homes in 2024/5, compared to 63,000 in 2004 (53 per cent).



9.11 The timeline shows that the significant growth has largely arisen due to approvals for very large schemes, which now make up the majority of London's pipeline. These schemes tend to have long development programmes and low build out rates. Despite the significant increase in the pipeline, completions have remained comparatively static, indicating a weak correlation between the number of homes permitted and build out.

9.12 The graph below shows that the number of affordable homes in the pipeline was relatively constant between 2007 and 2016, however it has increased since 2017.



9.13 As well as addressing housing need and helping to reduce significant costs to councils for temporary accommodation, delivering higher levels of affordable housing helps to sustain overall housing supply. A balanced mix of affordable and market tenures reduces reliance on private sales and helps to manage sales risk and absorption rates, which can otherwise slow the pace of delivery. The role of affordable housing and tenure diversity in supporting timely build out rates and housing delivery is acknowledged in the National Planning Policy Framework (December 2024, Consultation Draft December 2025), which highlights the importance of mixed tenure development in creating diverse communities while also supporting housing delivery[21].

9.14 This is also reflected in the emergency housing package announced by the Mayor and government which sets out the intention to provide greater levels of support through affordable housing grant and CIL relief for schemes providing higher levels of affordable housing.

9.15 In addition, the GLA is working closely with government and other partners to support affordable and overall housing delivery through a range of measures including: the Mayor's development management and call-in powers, the Affordable Homes Programme 2021-26 and the Social and Affordable Homes Programme (2026- 2036), work to bring forward development on permitted and new sites through the London Housing Mission, the New Homes Accelerator, ATLAS London and the City Hall developer, and strategic work on new towns, green belt review and the new London Plan.

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[21] See also MHCLG Planning Reform Working Paper: Speeding Up Build Out (2025) [Planning Reform Working Paper: Speeding Up Build Out - GOV.UK]

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