
HOUSING IN LONDON 2014

The evidence base for the Mayor's Housing Strategy



MAYOR OF LONDON

Housing in London 2014

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Introduction

Housing in London is the evidence base for the Mayor's London Housing Strategy, summarising key patterns and trends across a wide range of topics relevant to housing in the capital.

The Mayor formally adopted his London Housing Strategy in February 2010 and recently consulted on a revised version. This new edition of Housing in London has been developed alongside the revised draft Strategy.

Housing in London 2014 is divided into seven sections, as follows:

1. Historical background
2. Demographic, economic and social context
3. Housing supply and empty homes
4. Housing costs and affordability
5. Housing need
6. Mobility and decent homes
7. Appendices

This document sits alongside a range of other Greater London Authority publications (all available on www.london.gov.uk) that provide evidence or statistics on housing. These include (click to follow links):

- [GLA Affordable Housing programme statistics](#)
- [The London Plan Annual Monitoring Reports](#)
- [The 2013 London Strategic Housing Market Assessment](#)
- [The 2013 London Strategic Housing Land Availability Assessment](#)
- The [London Datastore](#), including the [London Housing Market Report](#), [house price data](#) and a wide range of [demographic statistics](#)

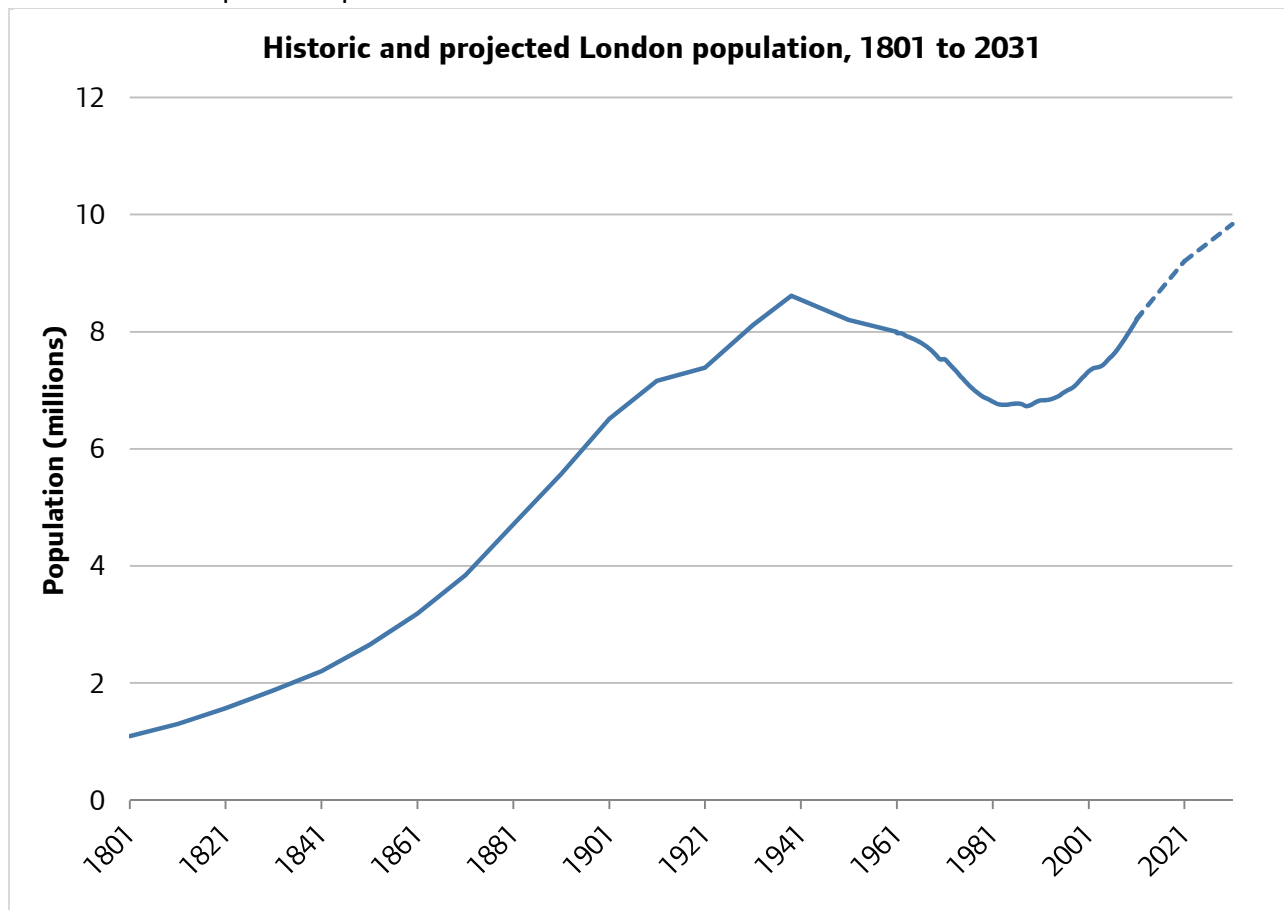
1 Historical background

London's population is growing rapidly, reaching 8.3 million in 2012, and is expected to soon exceed its previous peak of 8.6 million (1.1). Average household size rose in the last decade as population growth outpaced growth in the number of households (1.2).

Private renting, once the largest tenure in London, is rising rapidly again while owner occupation falls (1.3). 27% of households in London own their homes with a mortgage, with particularly high proportions in some Outer London neighbourhoods (1.4). 21% of households own their home outright, with particularly high rates in the suburban fringe (1.5). Social housing is the most spatially concentrated of the tenures, comprising a high proportion of housing in many Inner London neighbourhoods and 24% across London as a whole (1.6). 26% of households in London rent privately, with particularly high shares in affluent Inner London areas (1.7).

While London built fewer new homes in the last decade than in the 1960s and 1970s (1.8), the housing stock grew faster due to fewer demolitions and more conversions (1.9). Most Outer London homes were built in the 20th century (1.10), while homes in Inner London tend to be older, except for former docks and industrial areas where new building is concentrated (1.11). Flats comprise just over half of London's accommodation, compared to less than 20% in the rest of the country (1.12).

- 1.1. London's population is growing rapidly, reaching 8.3 million in 2012, and is expected to soon exceed its previous peak of 8.6 million



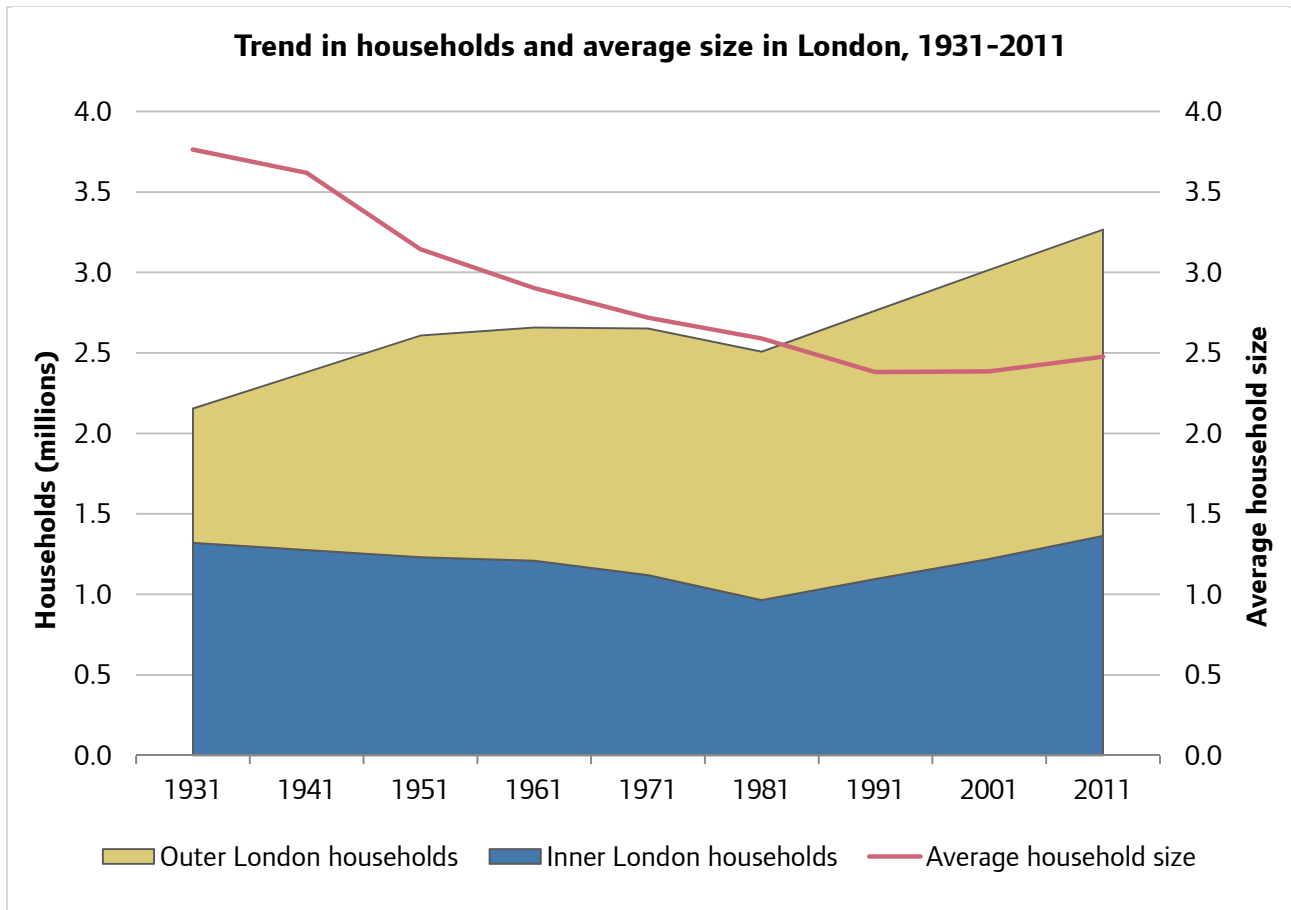
- London's population was just over a million in 1801, and grew fairly steadily until the Second World War, reaching 8.6 million in 1939.
- Following the war factors such as de-industrialisation, suburbanisation and population dispersal policies meant the population fell for several decades, only bottoming out in the 1980s.
- The number of Londoners grew by 440,000 in the 1990s and the pace of growth quickened in the 2000s, with an additional 930,000 in the decade to 2012, when the population stood at 8.3 million.
- The population is expected to grow by about a million between 2011 and 2021, passing its previous peak of 8.6 million sometime in the next few years and reaching around 10 million by 2031.
- These projected figures are 'unconstrained' by housing supply. In reality, if not enough new housing is built population growth is likely to be lower.

Sources and notes

Compiled by GLA from:

- 1801-1961: Persons present on Census day (ONS)
- 1961-2012: Estimated mid-year resident population (ONS)
- 2011-2031: Trend-based population projection (GLA)

1.2. Average household size in London fell for decades but has recently increased again, reaching 2.48 in 2011



- The number of households in London has grown rapidly in the last three decades, from 2.5 million in 1981 to 3.3 million in 2011.
- Inner London's growth has been particularly rapid, with its number of households growing by 400,000 or 41% since 1981, compared to 360,000 or 23% for Outer London.
- Outer London still accommodates the majority of London's households however, with 1.9 million in 2011 compared to 1.4 million in Inner London.
- The average household in London had almost four people in 1931, but by 1991 this had fallen to 2.38, only to rise again to 2.48 in 2011.
- The increase in London's average household size in the last decade was unexpected, and probably due to housing supply not keeping up with demand and thus suppressing household formation.

Sources and notes

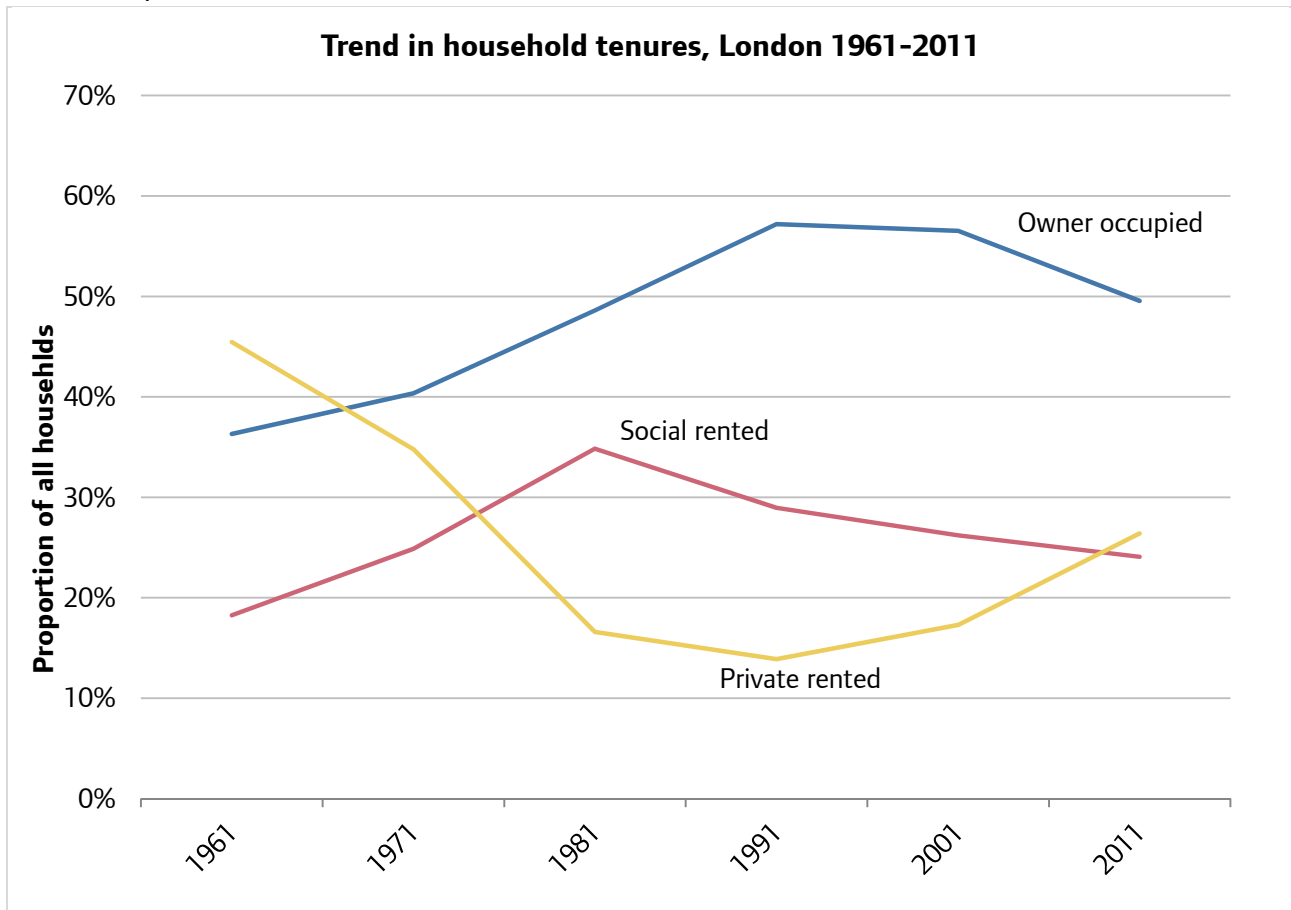
Compiled by GLA from:

- 1931 to 1951: Great Britain Historical GIS project (1941 value is interpolated)

- 1961 to 2011: GLA historical Census tables, derived from ONS data

- Note, average household size is estimated for 1931 to 1951 by dividing total population by the number of households. This slightly over-estimates average household size as it includes the population living in communal establishments

1.3. Private renting, once the largest tenure in London, is rising rapidly again while owner occupation falls



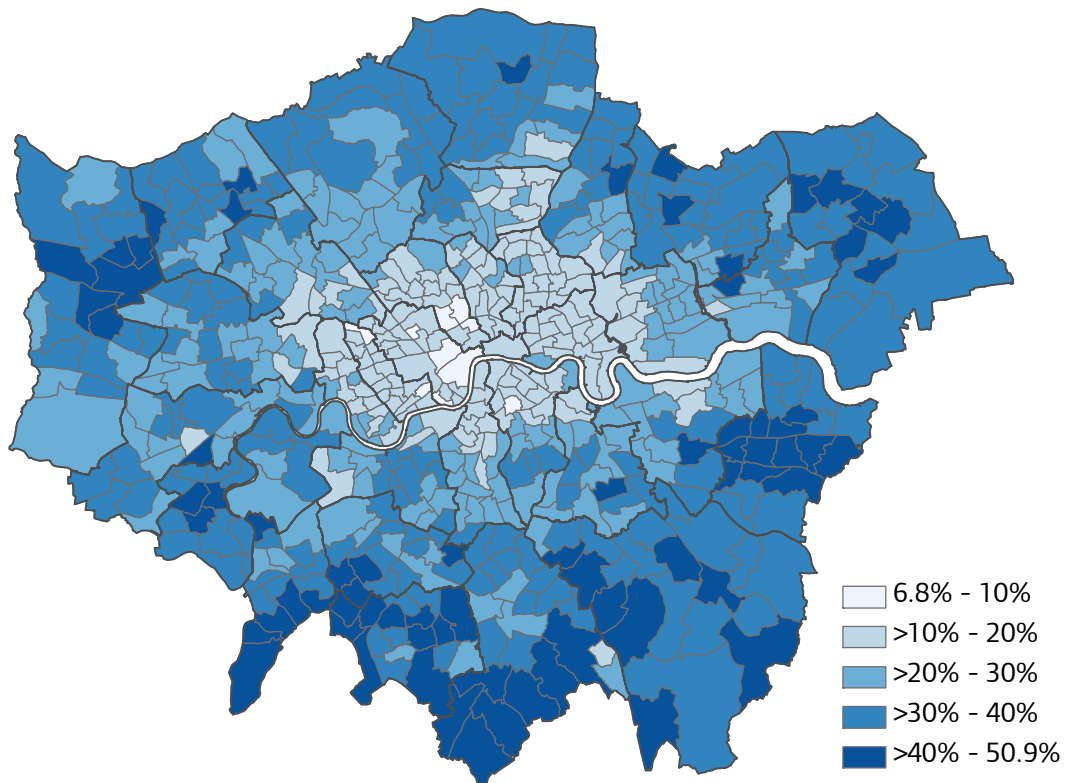
- The proportion of London households who own their own home (whether outright or with a mortgage) fell to just under half by the time of the 2011 Census, the first time owner occupiers have been in the minority since the 1980s.
- The private rented sector was once the largest tenure in London but shrank from 46% of households in 1961 to 14% in 1991, before rapid growth brought it back up to 26% in 2011, making it the second largest tenure.
- In contrast, social renting grew rapidly between the 1960s and 1980s, accommodating 35% of households in 1981, before falling to 24% in 2011.
- In England as a whole, 64% of households owned their home in 2011, with 18% each in social and private rented accommodation.

Sources and notes

- Compiled by GLA from ONS Census data
- Note, households renting from housing associations were included with private renting in 1961/71, but as there were very few they do not substantially affect the trends shown

- 1.4. 27% of households in London own their homes with a mortgage, with particularly high proportions in some Outer London neighbourhoods

Owners with a mortgage as a proportion of all households in London by ward, 2011



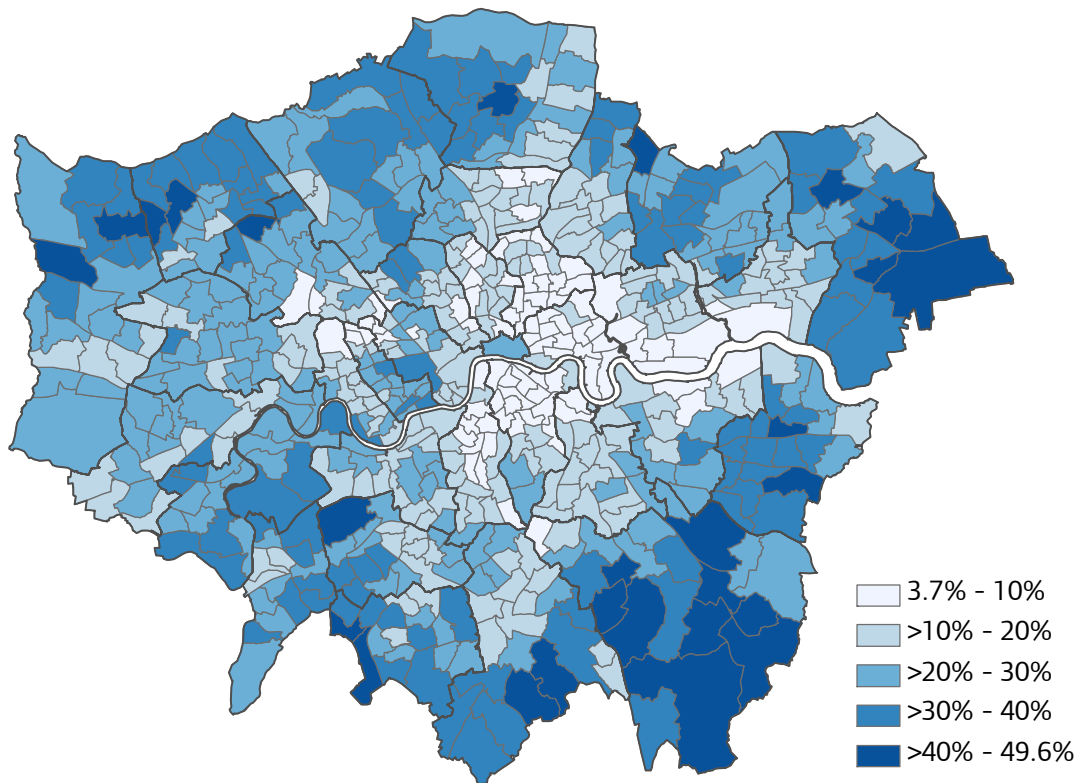
- In 2011 just over 886,000 households in London, 27% of the total, owned their own home with a mortgage, down from 34% in 2001.
- The proportion of households who owned their home with a mortgage varied from a low of 7% in the Golborne ward of Kensington and Chelsea to 51% in the St Michael's ward of Bexley.
- Although there is a noticeably higher proportion of mortgage-paying homeowners in Outer London than in Inner London, compared to the other tenure types this one is relatively evenly spread across London.
- Since 2001 the proportion of households who own their home with a mortgage has fallen nearly everywhere in London, with the exception of a few wards in Lambeth, Southwark and Greenwich.

Sources and notes

- ONS, 2011 and 2001 Census data

- 1.5. 21% of households own their home outright, with particularly high rates in the suburban fringe

Outright owners as a proportion of all households in London by ward, 2011



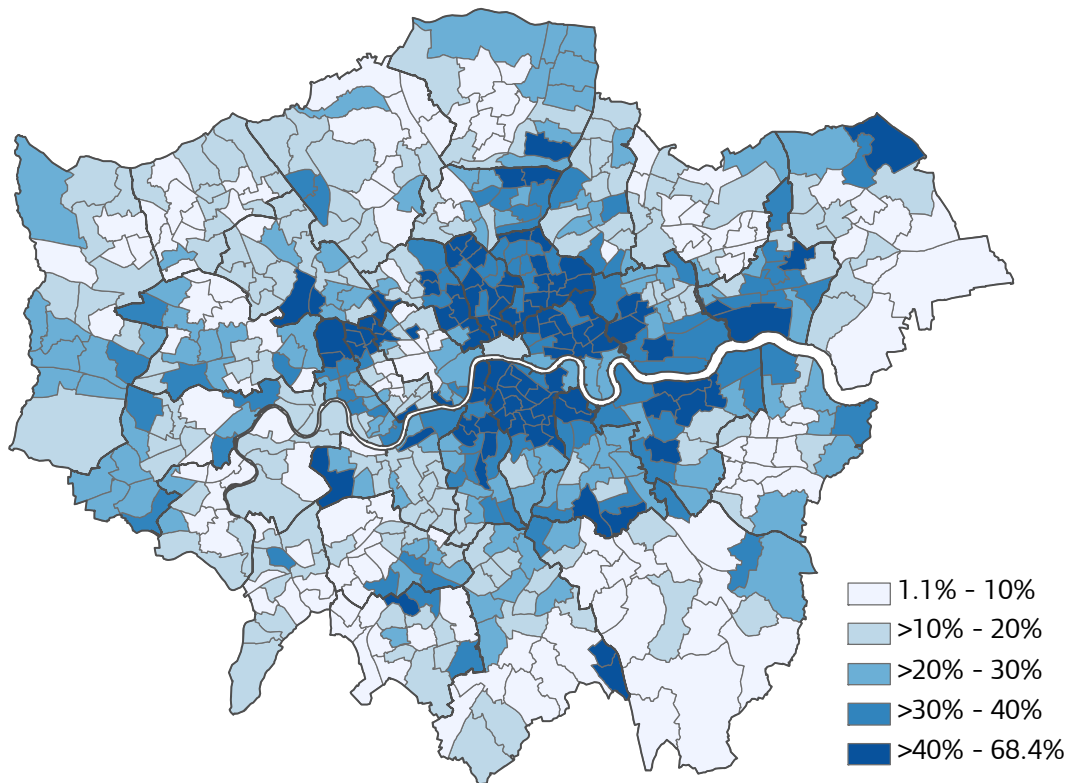
- In 2011 around 690,000 households owned their home outright (i.e. without a mortgage), 21% of all households in London (down slightly from 22% in 2001).
- The proportion of households that owned their home outright varied from 4% in the Peckham ward of Southwark to 50% in the Cranham ward of Havering.
- In a fifth of London's wards there were more outright owners than owners with a mortgage in 2011, with the biggest gaps seen in Knightsbridge in Westminster (where 34% of households owned outright compared to 12% with a mortgage).

Sources and notes

- ONS, 2011 and 2001 Census data

- 1.6. Social housing is the most concentrated of the tenures, comprising a high proportion of housing in many Inner London neighbourhoods and 24% overall.

Social tenants as a proportion of all households in London by ward, 2011



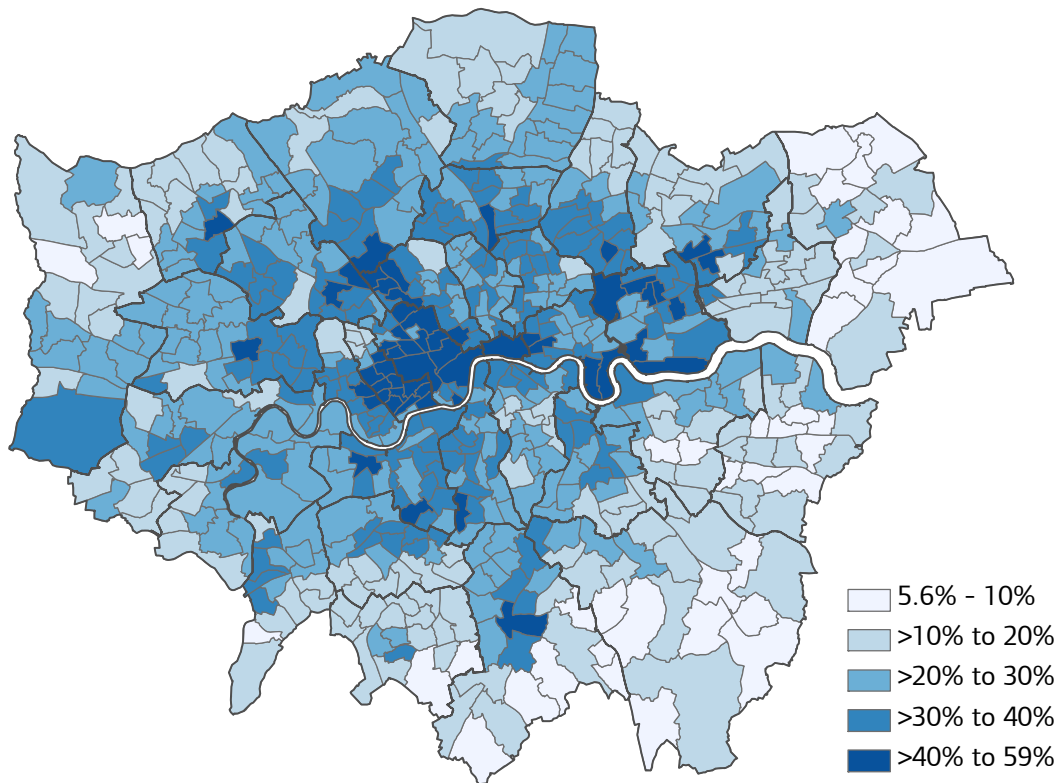
- In 2011 786,000 households in London lived in social rented housing, 24% of the total (down from 26% in 2001).
- Social housing is the most unevenly distributed of the tenures, with the proportion of social renting households ranging from just 1% in the Falconwood and Welling ward of Bexley to 68% in the Faraday ward of Southwark. In 34 wards (out of 625) a majority of households lived in social housing.
- Since 2001 the proportion of households in social housing has fallen in most parts of London and in particular in Inner London areas, due in part to high levels of new supply of other tenures and in part to Right to Buy sales.

Sources and notes

- ONS, 2011 and 2001 Census data

1.7. 26% of households in London rent privately, with particularly high shares in affluent Inner London areas

Private tenants as a proportion of all households in London by ward, 2011

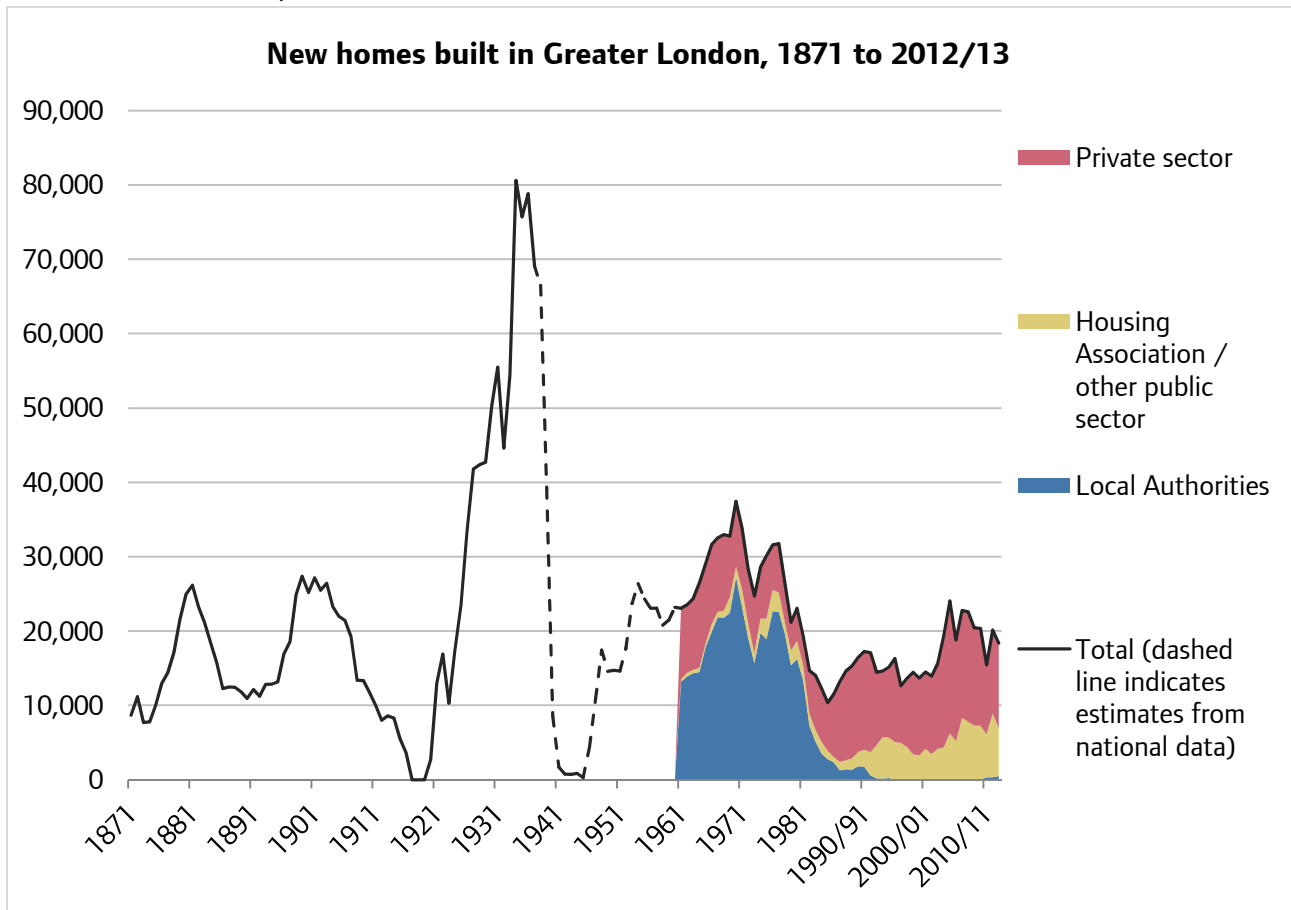


- In 2011 there were around 862,000 households living in London's private rented sector (including a small number in rent-free accommodation), 26% of the total (up from 17% in 2001).
- The greatest concentrations of private renting are in affluent neighbourhoods in West Inner London, with more than half of all households renting privately in eight wards in Westminster and Kensington and Chelsea. The highest proportion of private renters (59%) is found in the Bryanston and Dorset Square ward of Westminster, and the lowest (6%) in the Fieldway ward of Croydon.
- Since 2001 the proportion of households that rent privately has risen in the vast majority of London wards.

Sources and notes

- ONS, 2011 and 2011 data Census data

- 1.8. Post-war new housebuilding in London peaked at 37,000 new homes in 1970, less than half the mid-1930s peak of 81,000



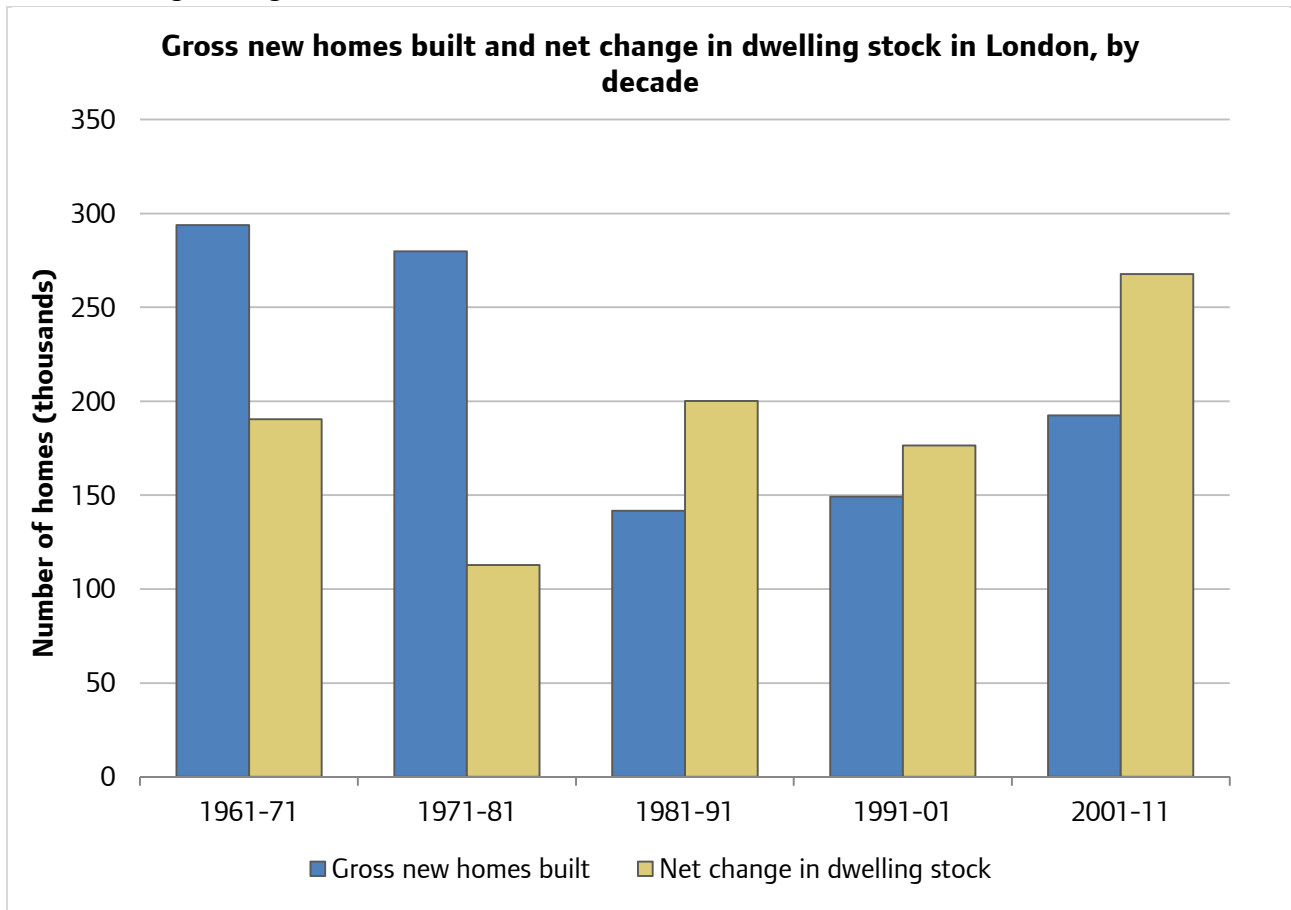
- Over the last decade an average of around 20,000 new homes have been built in London each year (not including any new supply from conversions or changes of use). This figure is above the levels of new build seen in the 1980s and 1990s, but well below the 1960s and 1970s, which saw a post-war peak of 37,400 in 1971.
- By far the greatest London housebuilding boom on record was in the 1930s, with a peak of 80,600 new homes reached in 1934. Most of these homes were built in Outer London suburbs, and the boom was driven by a combination of cheap land, easy finance and rapidly improving transport.

Sources and notes

Compiled by GLA from:

- 1871-1937: Report of the Commissioner of the Metropolitan Police, via Quandl.com;
- 1946-1960: GLA estimates based on national data from 1946 to 1960 (DCLG, Live Table 244) and London's share of the national total before World War II (from B. Mitchell, *British Historical Statistics*, p392) and after the war from the GLA and DCLG data below;
- 1961 to 1969: Annual Abstracts of Greater London Statistics;
- 1970 to 1989: Data provided to GLA by DCLG;
- 1990/91 to 2012/13: DCLG house building statistics

- 1.9. While London built fewer new homes in the last decade than in the 1960s and 1970s, the housing stock grew faster due to fewer demolitions and more conversions

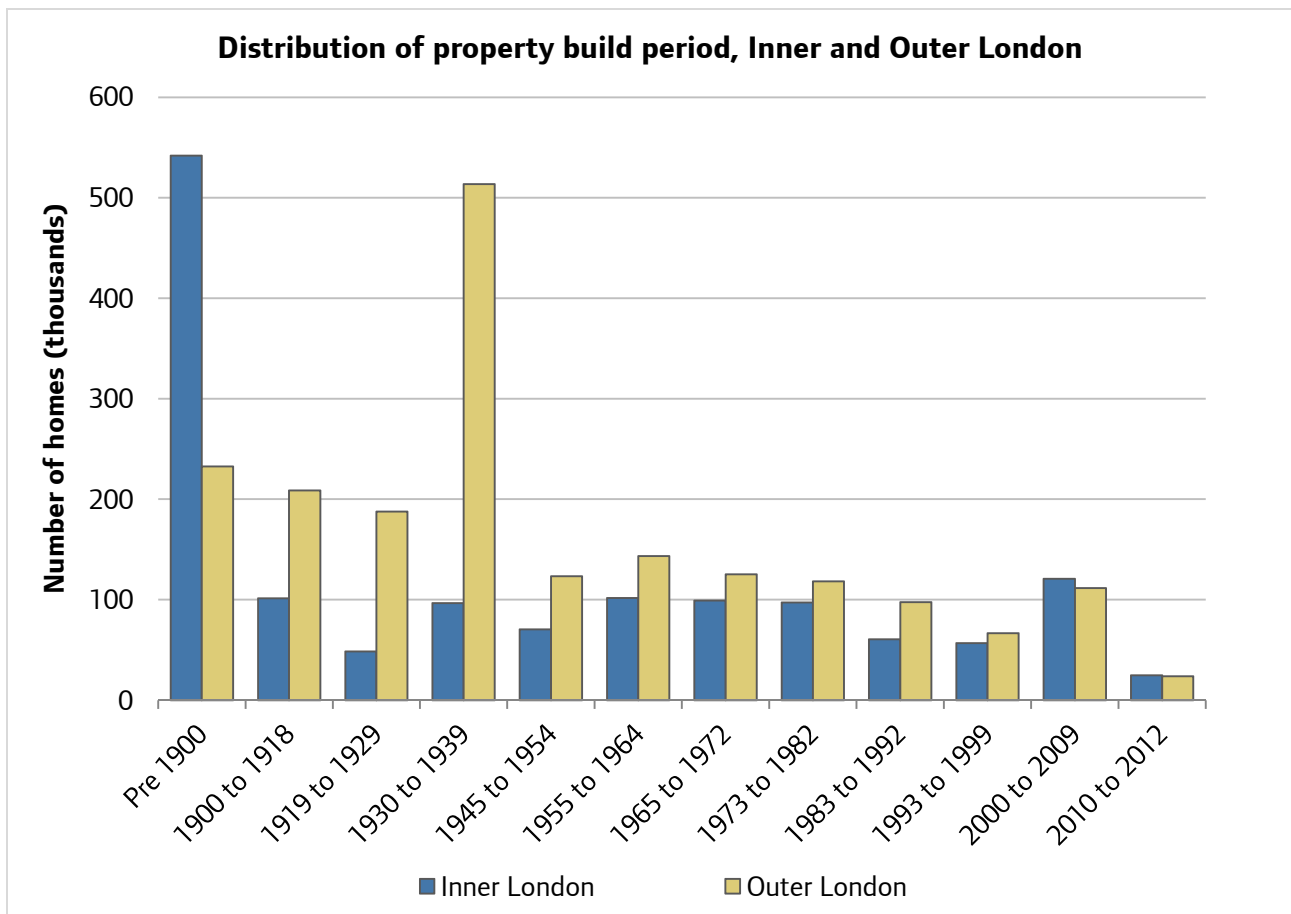


- While only 193,000 new homes were built in London in the last decade, Census data indicates that the net increase in the dwelling stock was actually greater, at around 270,000.
- The net increase in the dwelling stock can be lower than the number of new homes built if there are substantial numbers of homes demolished. This was the case in the 1960s and 1970s when slum clearance schemes saw large numbers of homes replaced with new build.
- More recently the net increase in the dwelling stock has been higher than the level of new build, presumably due to a combination of relatively few demolitions and substantial supply from non-new build sources such as conversions from houses to flats and buildings being changed from industrial or commercial uses to residential.
- Only around 5,000 homes a year are demolished in London, at which rate it would take 700 years to replace London's entire dwelling stock.

Sources and notes

- Gross new homes built from same sources as 1.8 above
- Net change in dwelling stock from comparisons of Census dwelling estimates
- Note, the growth in 2001 to 2011 may be over-stated due to under-counts in 2001

1.10. Most Outer London homes were built in the 20th century, while Inner London has more of both the oldest and newest homes

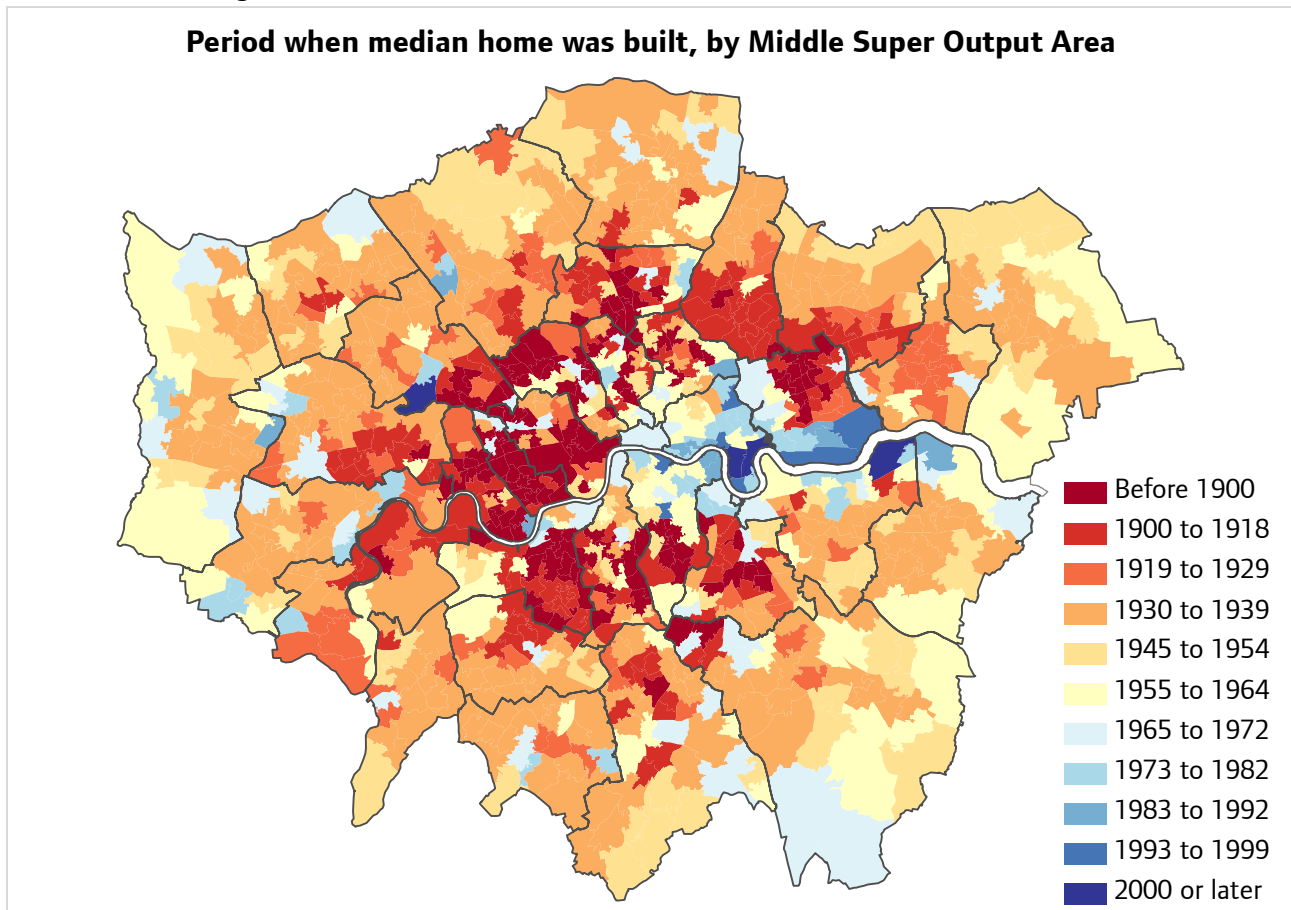


- Reflecting London's outward growth over time, there are striking differences between the age distribution of the housing stock between Inner and Outer London .
- 540,000 homes in Inner London, almost 40% of its housing stock, were built before 1900, compared to just 12% of Outer London's homes. In every part of the 20th century there were fewer homes built in Inner than in Outer London (at least, fewer homes that survive today), but so far in the 21st century Inner London has built slightly more.
- As mentioned above, the building boom of the 1930s was confined almost entirely to Outer London. Just over half a million homes, a quarter of Outer London's total housing stock, was built in that decade alone.

Sources and notes

- VOA, *Council Tax Property Attributes*, 2012.

1.11. Homes in Inner London tend to be older, except for former docks and industrial areas where new building is concentrated

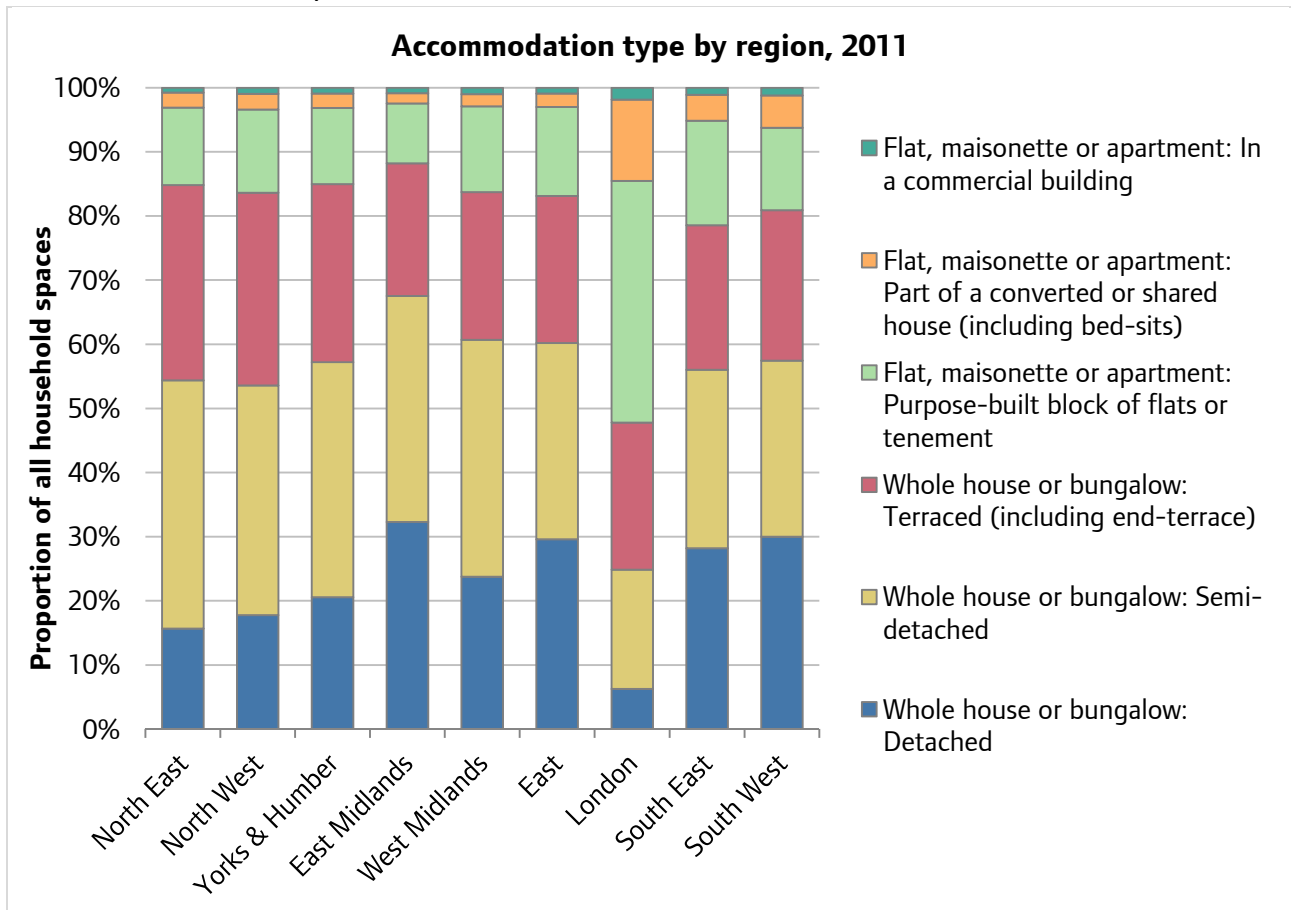


- The average age of homes in London varies widely across the capital, from pre-1900 in much of the west inner city to post-2000 in Canary Wharf, Wembley and other pockets of new development.
- These patterns reflect London's historic outward growth, the capacity freed up in East London by de-industrialisation and other land use change, and to a lesser extent the impact of wartime bombing.
- Across London as a whole around 23% of homes were built before 1900, a proportion which varies from 1% in Barking and Dagenham to 65% in Kensington and Chelsea.
- The borough with the most 21st century homes as a proportion of its stock is Tower Hamlets at 28% (also the highest figure in the country), while Bexley and Kensington and Chelsea have the least at 3% each (among the lowest in the country).

Sources and notes

- VOA, *Council Tax Property Attributes*, 2012.
- Median property age calculated by GLA

1.12. Flats comprise just over half of London's accommodation, compared to less than 20% in the rest of the country



- Houses comprise the great majority of accommodation in every region except London and across the country as a whole, but in London flats, maisonettes or apartments (whether purpose built or converted) account for just over half of all accommodation, with detached or semi-detached comprising 25% to over half in every other region.
- Terraced housing comprises 23% of London's housing, and purpose-built flats 38%. Converted or shared flats (including bed-sits) comprise 13%. Finally, flats in a commercial building accounted for 2% of London's housing.

Sources and notes

- ONS, Census 2011
- Excludes household spaces in caravans, of which there are 2,800 in London and just over 100,000 in England as a whole

2 Demographic, economic and social trends

London's population was shrinking as recently as the 1970s, but since the 1980s has been growing increasingly rapidly, increasing by over 100,000 in each of the last four years (2.1). The direct cause of increased population growth is natural change (births minus deaths), but migration has indirectly contributed by lowering the average age (2.2).

London's population increased much faster than the number of households over the last decade, particularly in Outer London (2.3). Most parts of London saw substantial growth in population between 2001 and 2011 (2.4), but just over half of Outer London's population growth was due to rising household size, while growth in Inner London was mostly due to a rising number of households (2.5).

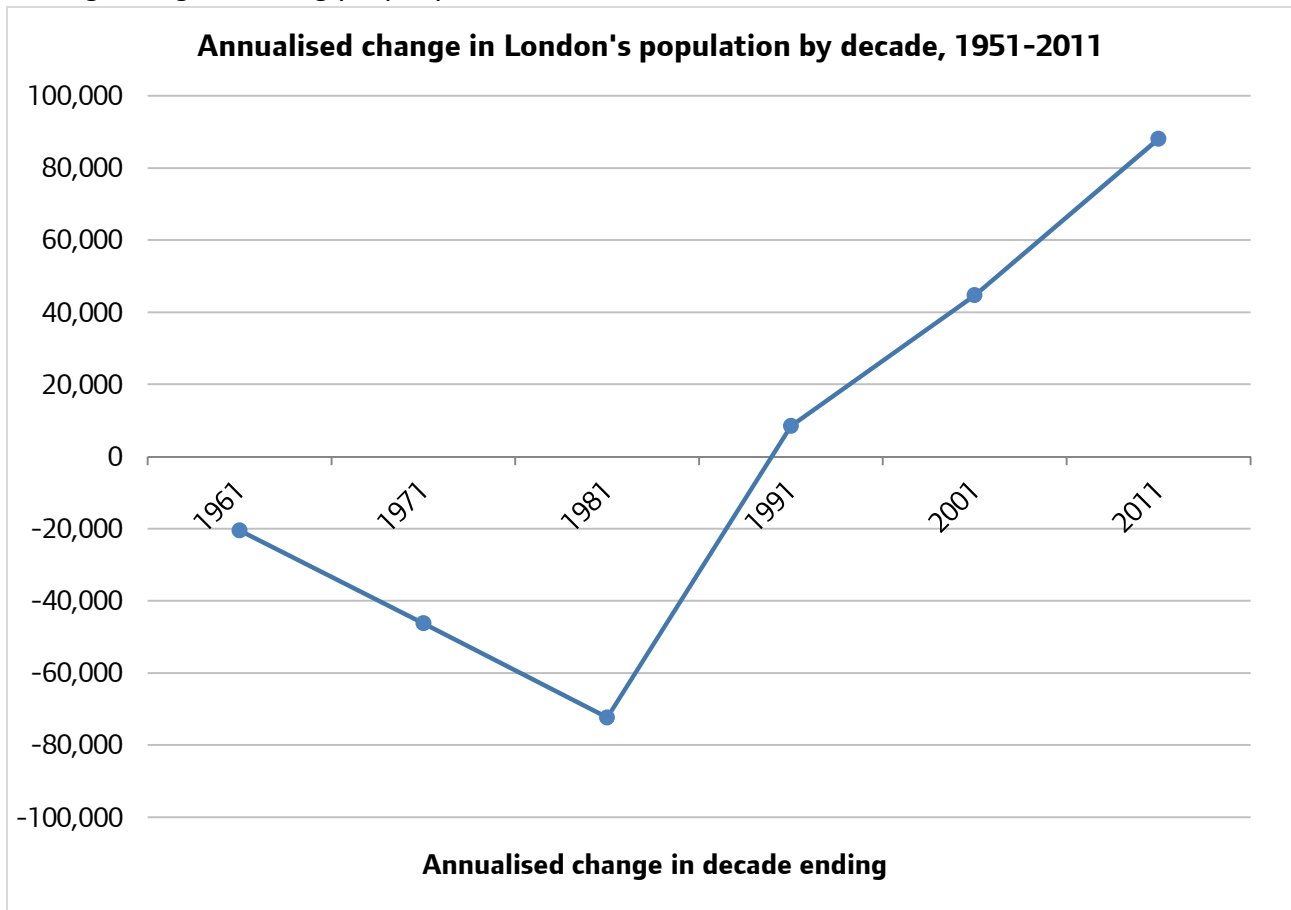
Between 2001 and 2011, London's population saw rapid growth among all age groups except those aged over 70 (2.6). London attracts a large net inflow of people in their 20s from the rest of the UK, but sees a net outflow of people of every other age (2.7). Many domestic and international migrants live in London's private rented sector, where only 10% of adults were born in London, compared to 26% in owner occupied housing and 34% in social housing (2.8).

Young adults in London are now less likely to head a household than before (while the opposite is true of those in middle age) (2.9), and are now much more likely to rent than to own (2.10). The drop in London's home ownership rate has mainly affected those with a mortgage, while outright ownership remains relatively steady (2.11).

Owner occupying households tend to live in larger homes than private or social tenants (2.12). London's private rented sector accommodates households on a wide range of incomes, while low income households are concentrated in social housing and higher income households in owner occupation (2.13). Attitudes to housing vary across the tenures, with only half of private tenants in London satisfied with private renting, though far more are satisfied with their accommodation (2.14). Patterns of economic activity also vary widely across tenures, with unemployment lowest in owner occupation and highest in social renting (2.15).

London saw faster economic growth than the rest of the UK both before and after the last recession (2.16), and its jobs market has also recovered very strongly, adding a quarter of a million jobs in the last year alone (2.17).

2.1. London's population was shrinking as recently as the 1970s, but since the 1980s has been growing increasingly rapidly

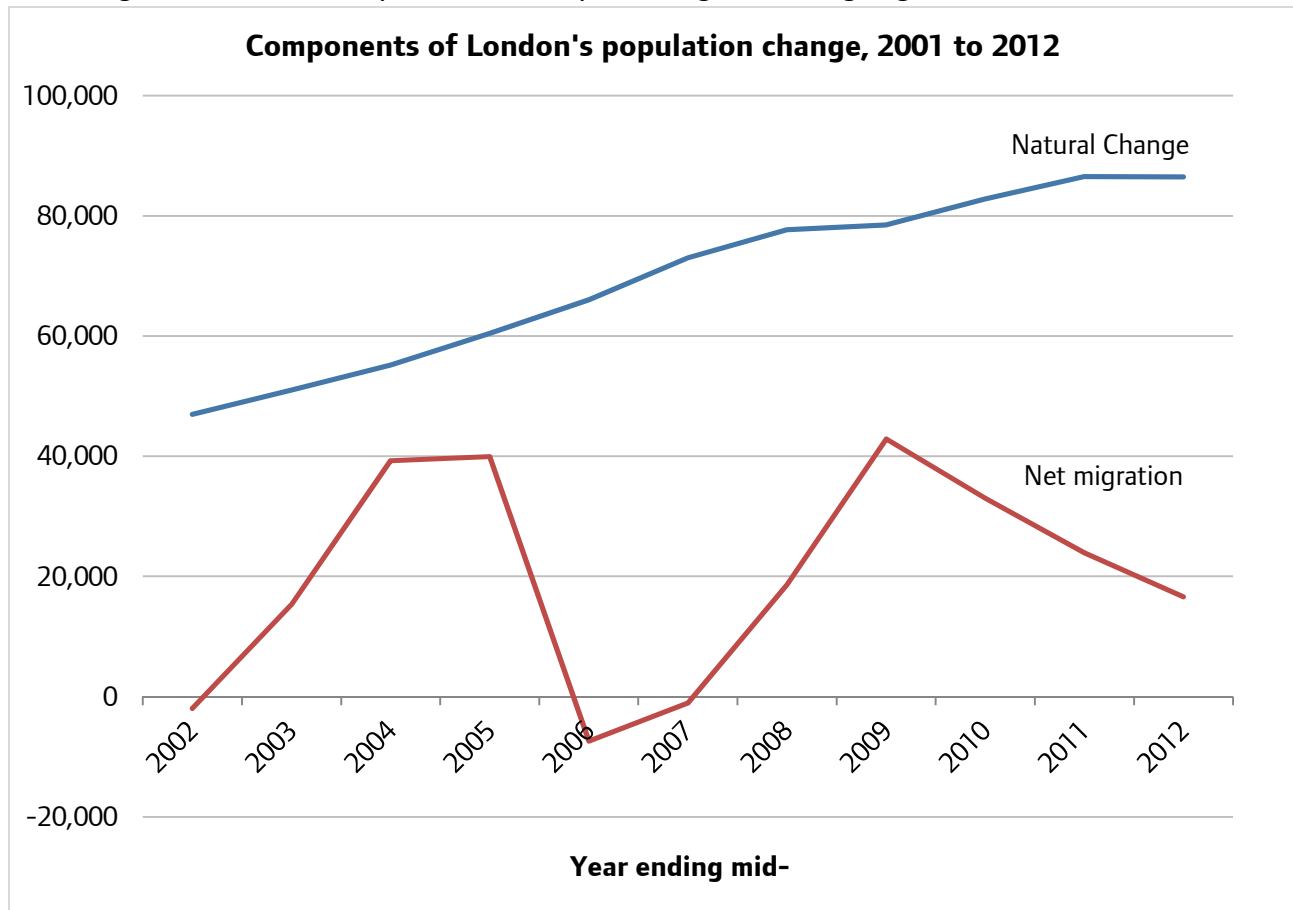


- London's population fell throughout the 1950s, '60s and '70s, losing just over 700,000 people over the '70s alone. But the decline slowed and finally halted by the mid-1980s, with a small net growth registered over the decade.
- Sustained growth began in the 1990s and accelerated in the 2000s, with the population rising by over 800,000 in the first decade of the 21st century.
- In the last four years London's population is estimated to have grown by over 100,000 a year, perhaps the fastest growth in its history (the 1890s saw growth of 93,800 a year but no yearly figures are available).
- This rapid and sustained population growth, at a time when housing supply has fallen due to the financial crisis and recession, is a major contributor to rising prices and rents across the capital.

Sources and notes

- ONS Census data and ONS/GLA mid-year population estimates

2.2. The direct cause of increased population growth is natural change (births minus deaths), but migration has indirectly contributed by lowering the average age

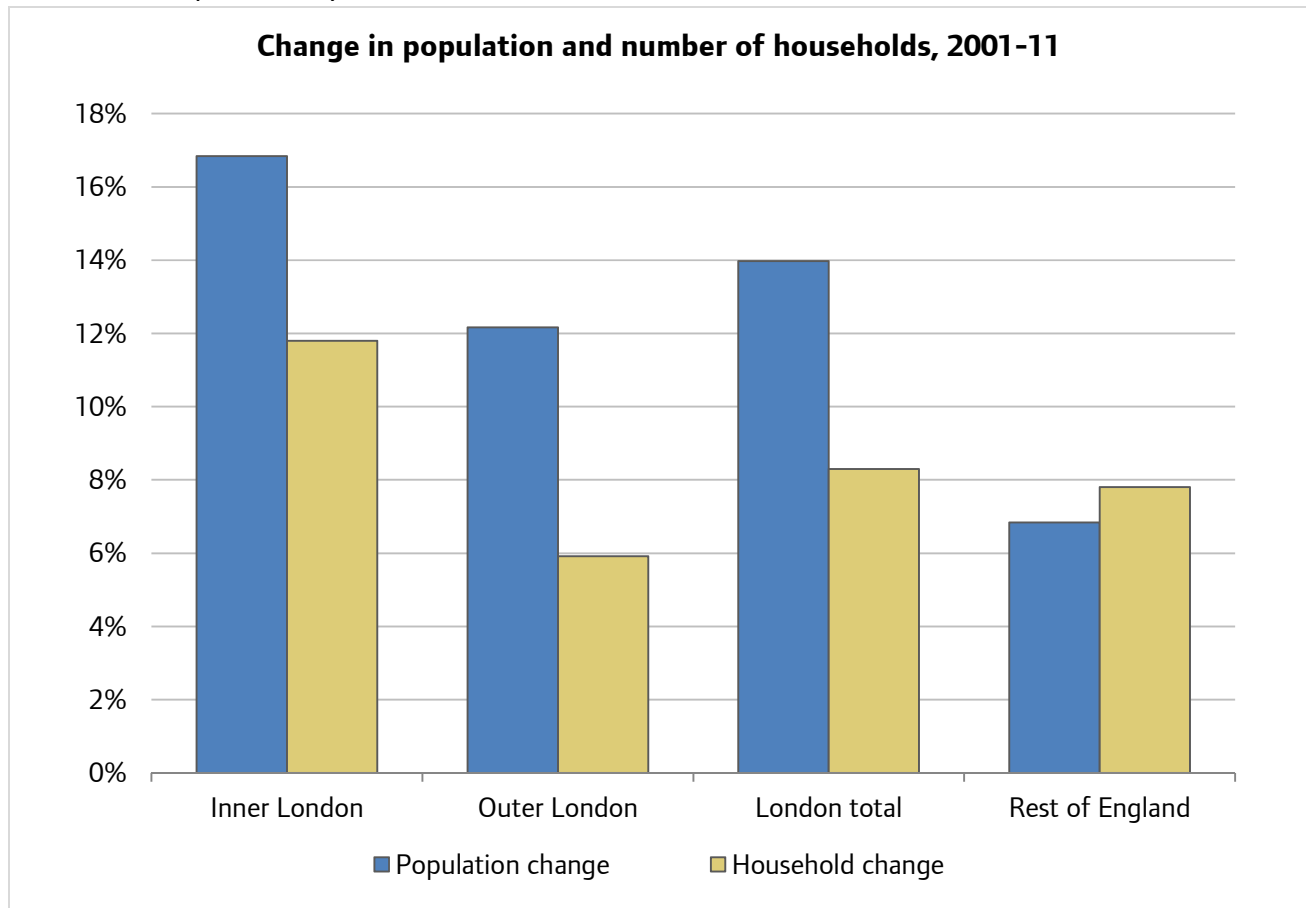


- On the face of it, London's population boom is being driven by a big increase in natural change, i.e. the annual surplus of births over deaths. This in turn is mainly due to rapid growth in the number of births, from around 100,000 a year in 2002 to 134,000 in 2012.
- The trend in net migration (both domestic and international) is more volatile, but migration helps explain a large part of the increase in natural change, because its net impact has been to greatly expand the number of young adults in London.

Sources and notes

- ONS data on births and deaths
- GLA net migration series, adjusted from ONS data

2.3. London's population increased much faster than the number of households over the last decade, particularly in Outer London

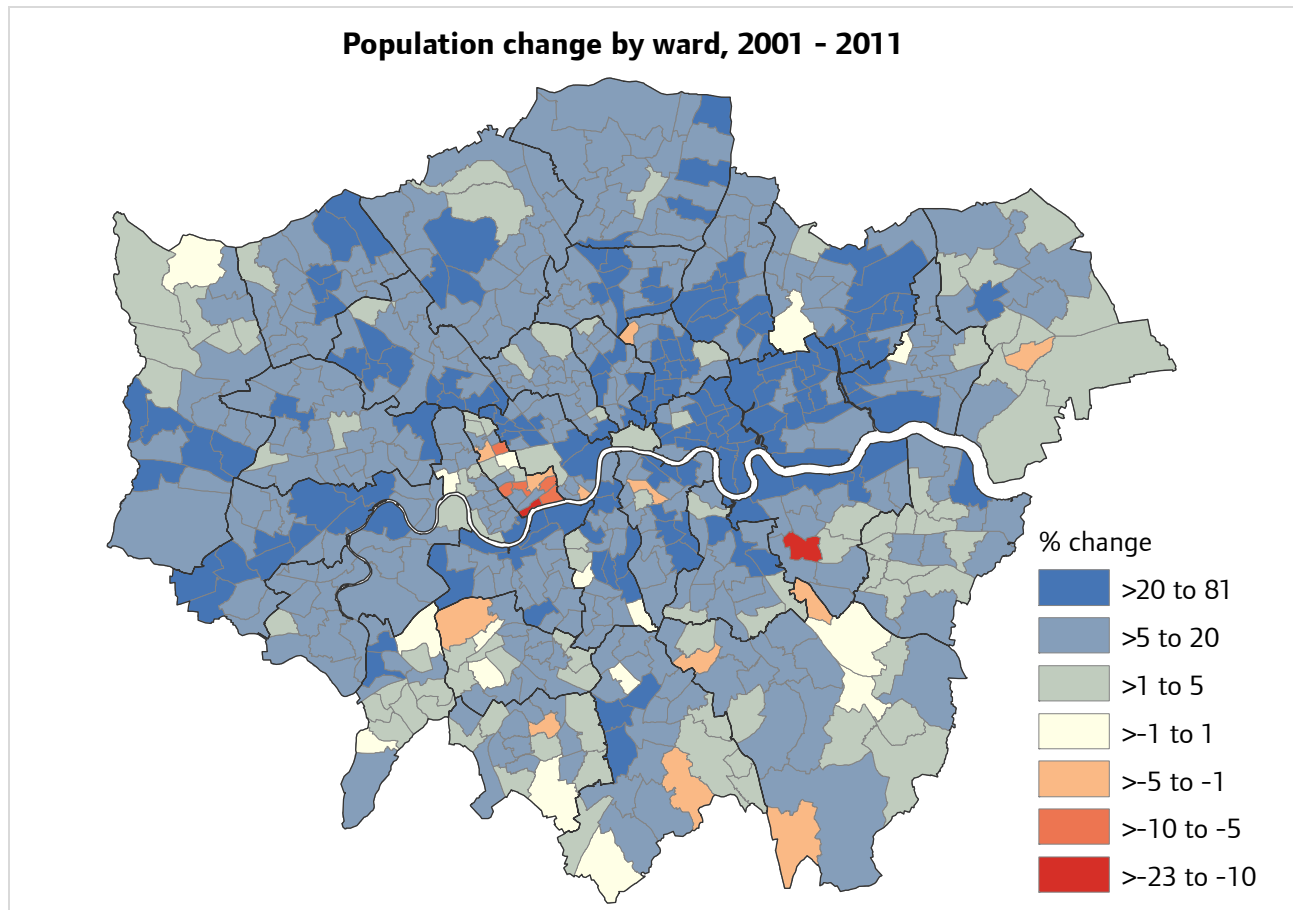


- London's population as recorded by the Census grew by 14% between 2001 and 2011, compared to 7% in the rest of England.
- Population growth was particularly fast in Inner London, with growth of 17% compared to 12% in Outer London.
- Growth in the number of households did not keep up with population growth (due in large part to a failure to provide enough housing), and average household sizes grew as a result. This was particularly the case in Outer London, where the population grew by 12% but the number of households by only 6%.
- In the rest of England the number of households grew faster than the number of people, and average household size fell.

Sources and notes

- ONS Census data 2001 and 2011
 - Note, in order to show population and household growth on the same chart the comparison used here is from Census to Census, as opposed to from mid-year estimate to mid-year estimate. The 2001 Census is thought to have significantly under-counted the population in some London boroughs.

2.4. Most parts of London saw substantial growth in population between 2001 and 2011



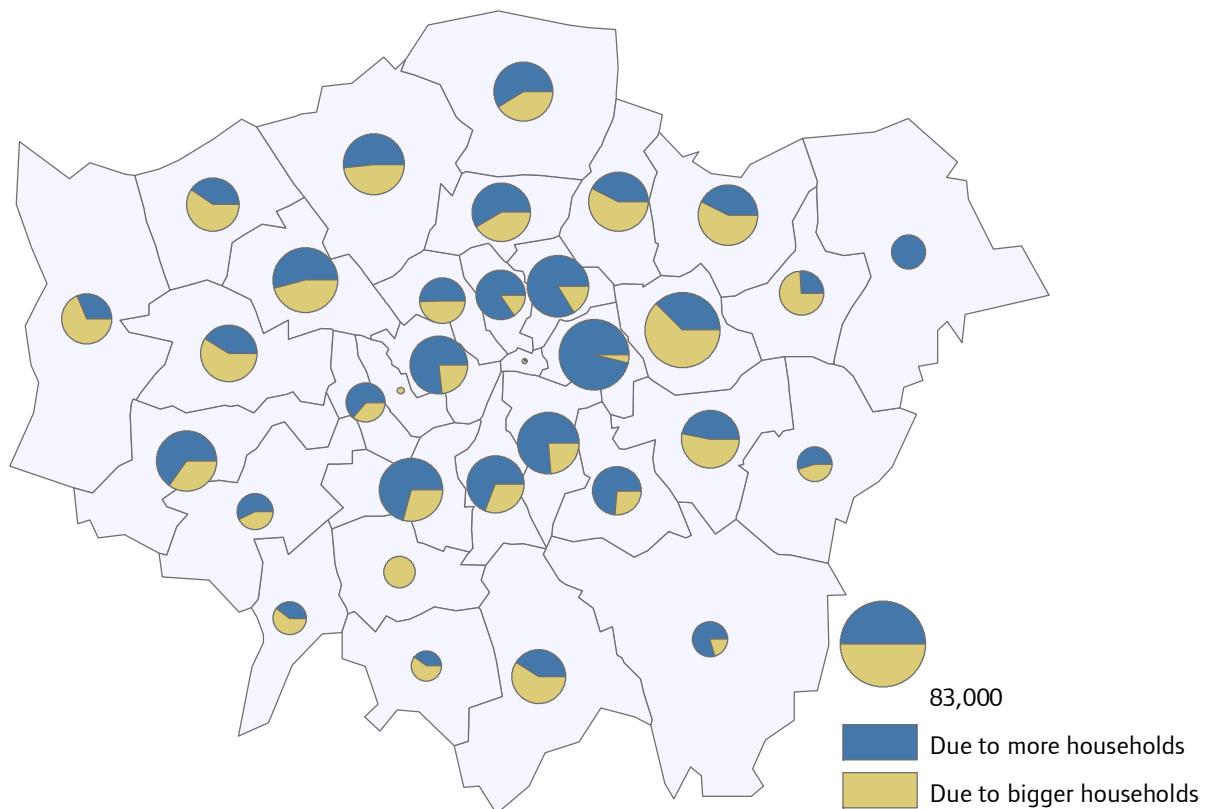
- With London's population growing rapidly between 2001 and 2011, most parts of the city saw an increase in population, in particular the east inner city.
- The fastest growing wards were in Westminster (Church Street, 81%) and Tower Hamlets (Millwall, 79%), while the greatest population declines were in Greenwich (Eltham West, 23%) and Kensington and Chelsea (Cremorne, 14%).
- While the biggest localised population drops seem to be due to the temporary effects of large estate regeneration schemes (e.g. Kidbrooke in Greenwich), only Kensington and Chelsea saw a fall in population (of 0.2%) at borough level.

Sources and notes

- ONS Census data 2001 and 2011
- Unlike the mid-year estimates used elsewhere in this report, 2001 data in this map has not been adjusted for under-counting

- 2.5. Just over half of Outer London's population growth was due to rising household size, while growth in Inner London was mostly due to a rising number of households

Population increase due to more or bigger households by borough, 2001 to 2011

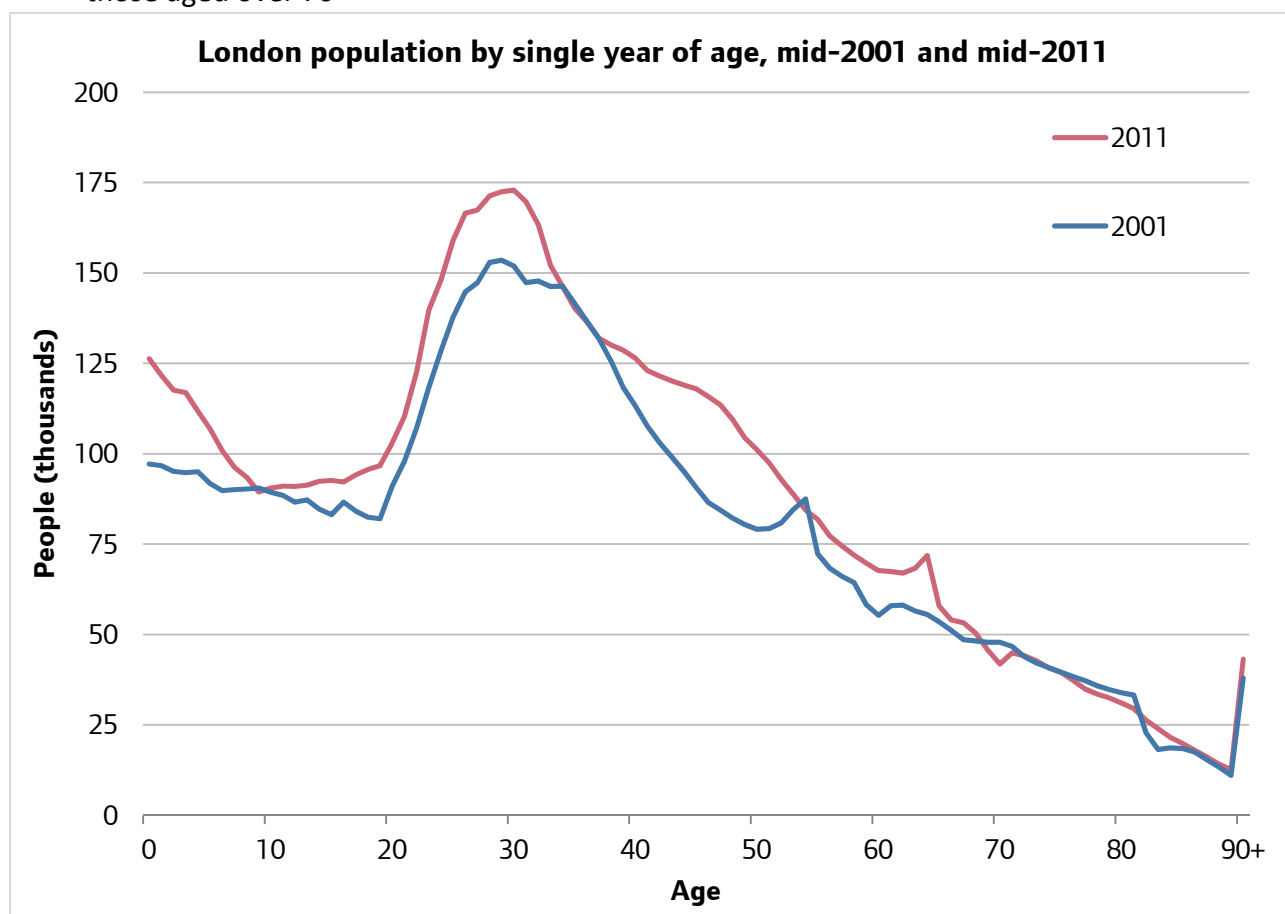


- The change in the household population (i.e. excluding people in communal residences) can be decomposed into change due to a different number of households (itself mainly driven by the rate of new housing supply) and change due to a different household size.
- Across London as a whole, 42% of population growth between 2001 and 2011 was due to rising average household size, and the other 58% due to a rising number of households.
- In Inner London 70% of population growth was due to increase in the number of households, due in large part to higher rates of housebuilding. But in Outer London 52% of growth was due to rising average household size, as population growth outpaced new housing supply.

Sources and notes

- ONS Census data 2001 and 2011
- Uses unadjusted 2001 Census data

- 2.6. Between 2001 and 2011, London's population saw rapid growth among all age groups except those aged over 70

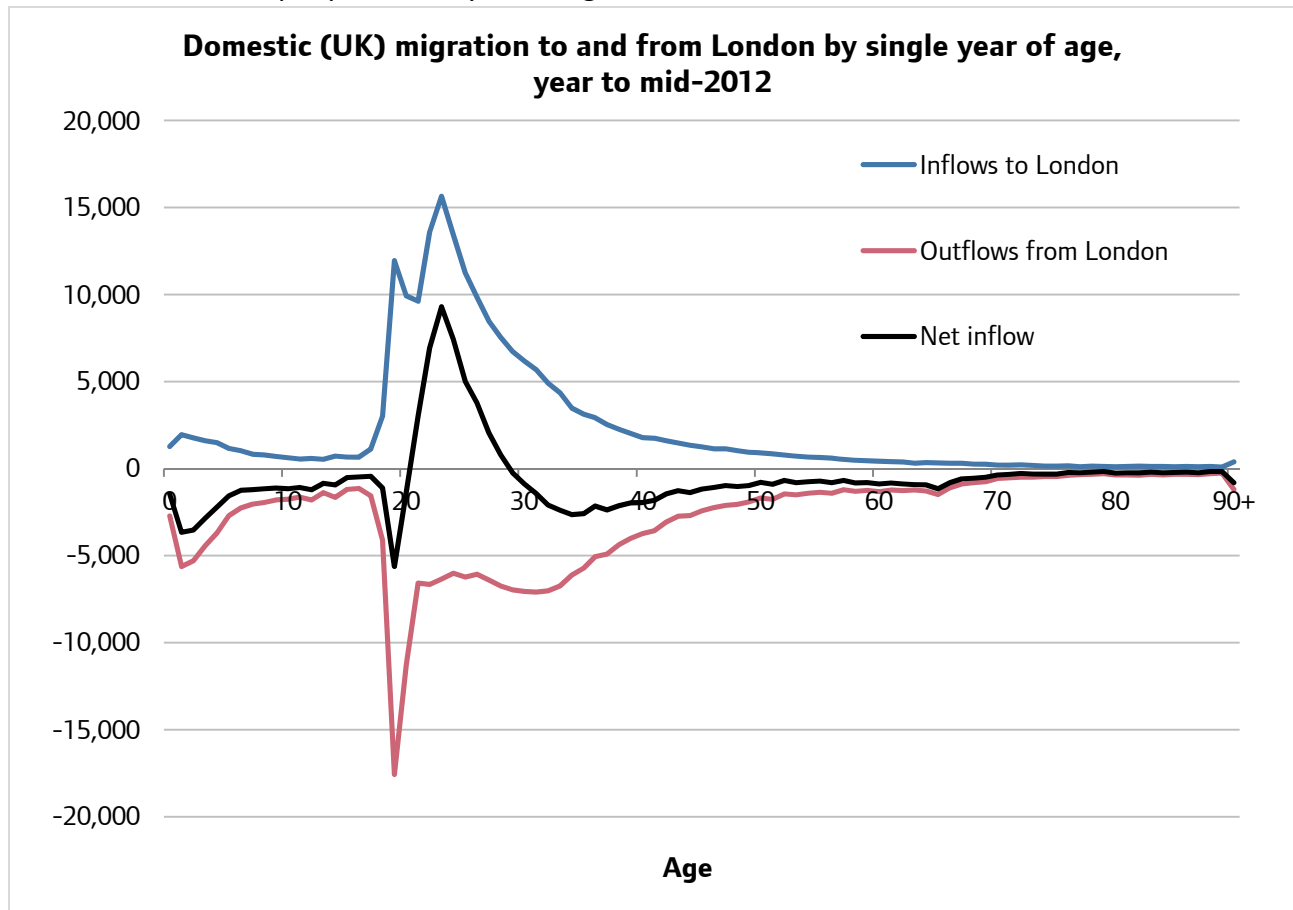


- Over the last decade London has seen particularly strong growth in the number of young children and working age adults, but comparatively little growth in its elderly population.
- The number of children aged up to 4 increased by almost a quarter between 2001 and 2011, with lower rates of growth among older children.
- The number of adults in their 20s in London, already very high by national standards, grew by 180,000, and there was a similar rate of growth among those in their 40s.
- The number of people aged 70 or over grew by less than 1%, however, in stark contrast to rapid growth in the rest of England. Given the ongoing improvements in life expectancy, this slow growth is likely due to relatively high rates of migration out of London by older people.

Sources and notes

- ONS mid-year estimates 2001 and 2011

2.7. London attracts a large net inflow of people in their 20s from the rest of the UK, but sees a net outflow of people of every other age

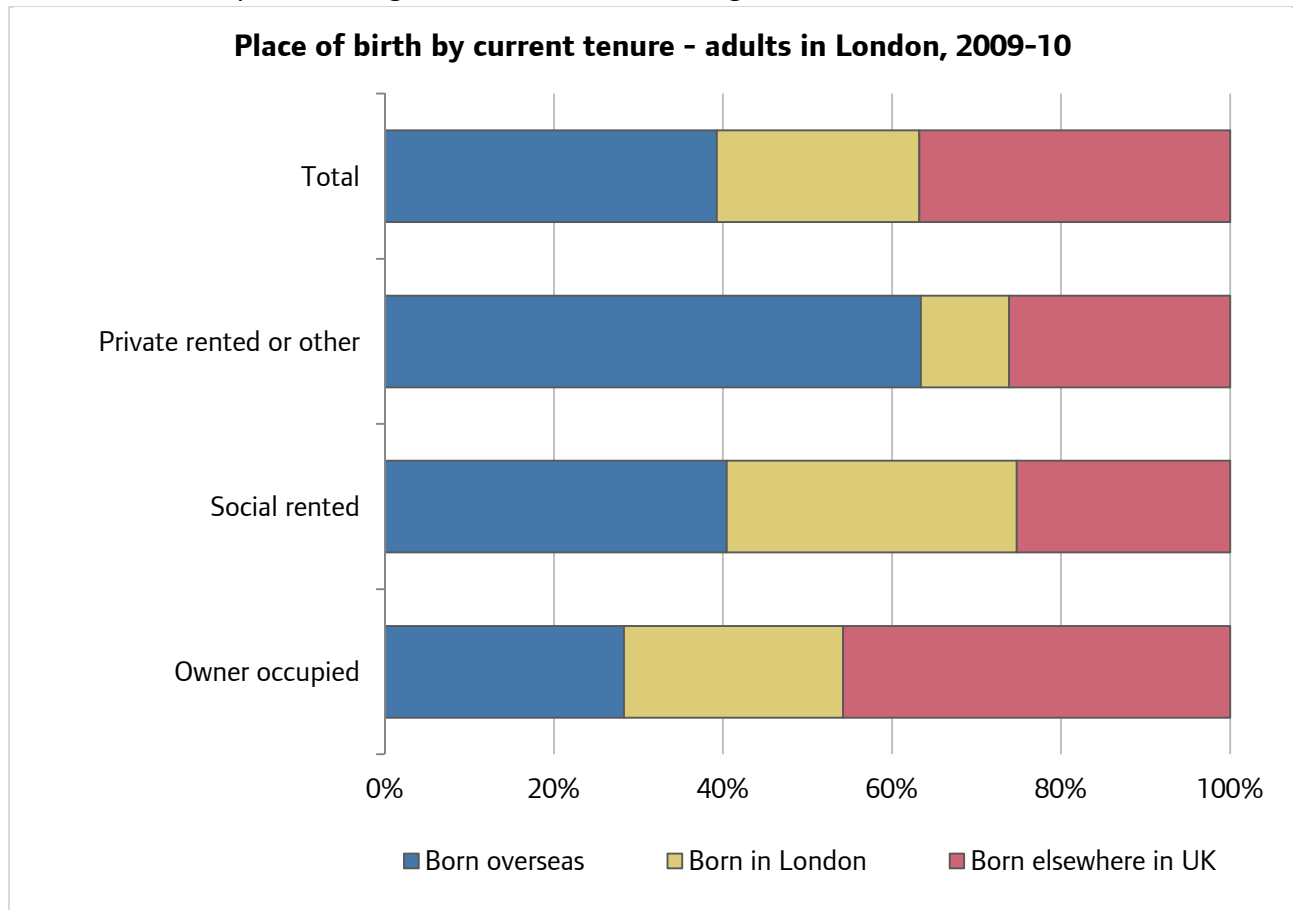


- The growth in London's population of young adults is largely driven by migration, partly international migration and partly domestic migration as shown in this chart.
- The biggest flows for any single year of age happen at 19, with around 18,000 19 year olds leaving London in the year to mid-2012 and around 12,000 arriving.
- Around 106,000 people in their 20s came to London from the rest of the UK during the year and around 69,000 left, creating a net inflow of 37,000.
- There are substantial net outflows of people in their 30s and older, along with their children.
- While the same breakdown is not available for international migrants, Census data indicates that most international in-migrants are also relatively young, with 79% of recent arrivals aged between 16 and 34 in 2011, a similar proportion to domestic migrants.

Sources and notes

- ONS, data on domestic migration
- ONS, 2011 Census data

2.8. Only 10% of adults in the private rented sector were born in London, compared to 26% in owner occupied housing and 34% in social housing

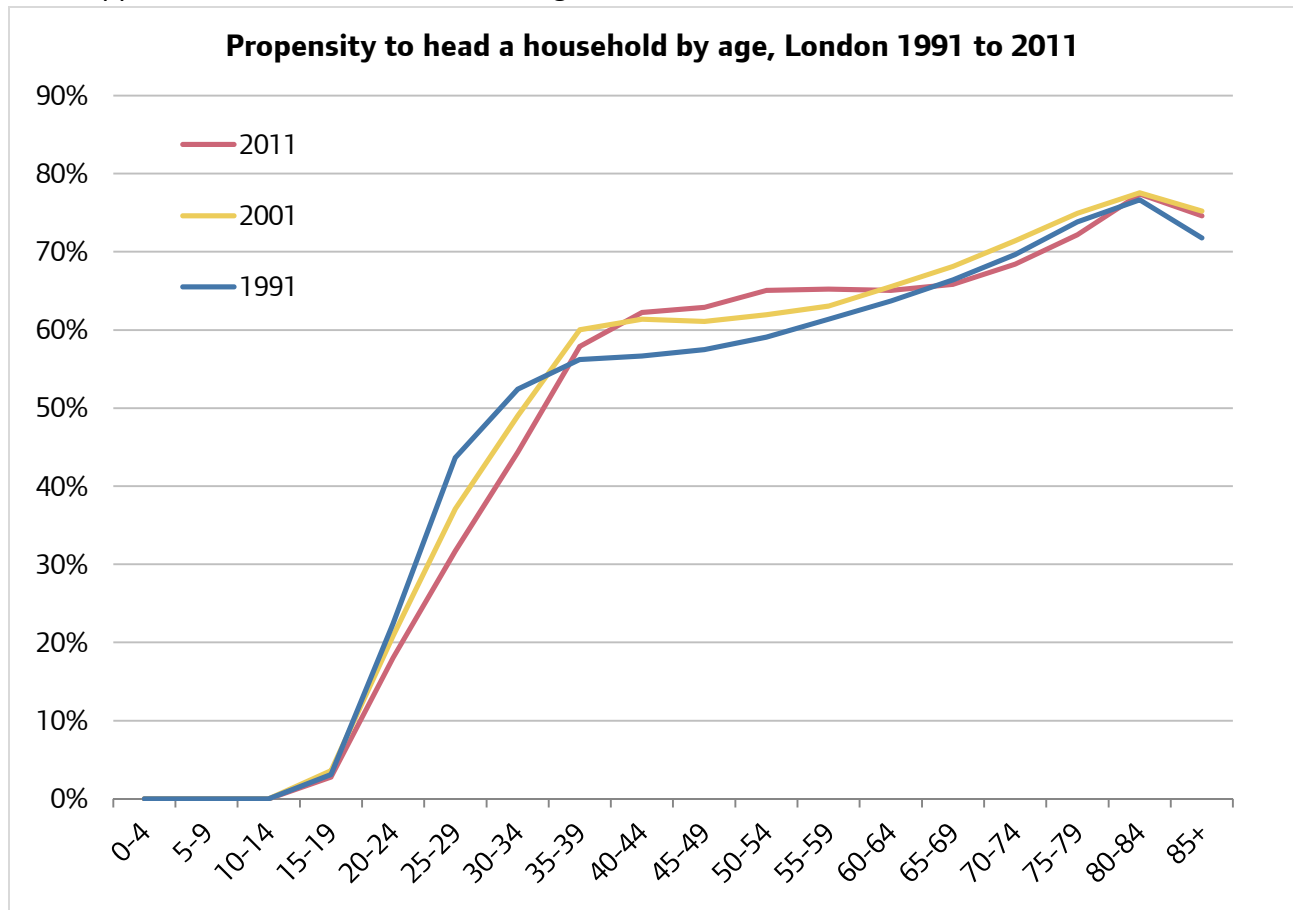


- Around 24% of adults were born in London and around 39% overseas, but these shares vary widely between the different housing tenures.
- 63% of adults in the private rented sector were born overseas, 10% in London and 26% elsewhere in the UK.
- Social housing has the highest share of people born in London at 34%, presumably due in large part to allocation rules which prioritise people with local connections.
- Almost half of owner occupiers were born elsewhere in the UK, with 26% born in London and 28% overseas (the lowest overseas share of any tenure).

Sources and notes

- GLA analysis of Understanding Society survey Wave 1 (2009-10)

2.9. Young adults in London are now less likely to head a household than before, while the opposite is true of those in middle age

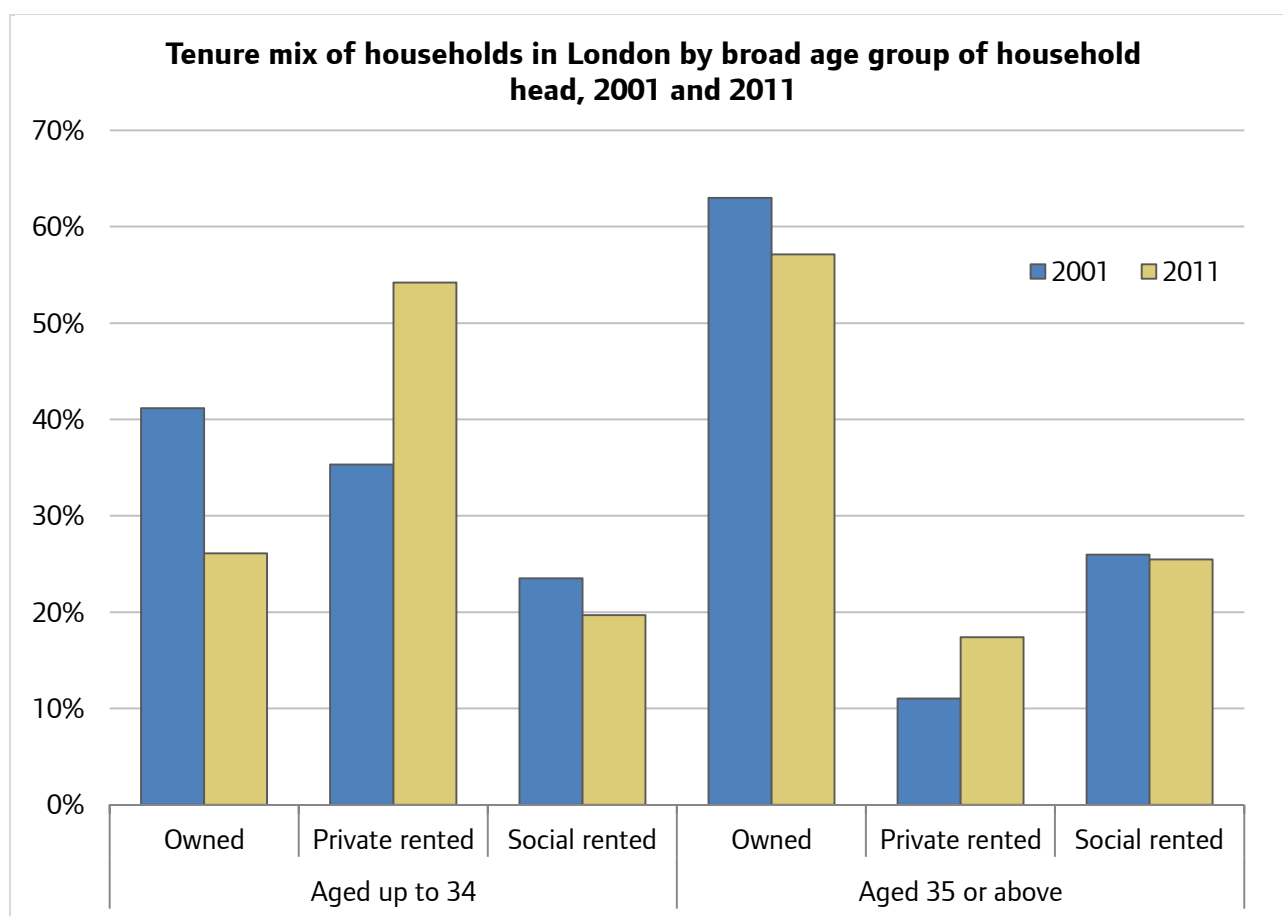


- Falling rates of household formation, linked to rapid population growth and an under-supply of housing, have particularly affected young adults in London, who are now less likely to head a household than they were in 1991 or 2001.
- For example, in 1991 44% of people aged 25 to 29 in London headed a household, but by 2011 this had fallen to 32%.
- But while young adults are now less likely to head a household, those in middle age are more likely. For example, 59% of people aged 50 to 54 headed a household in 1991, but this rose to 65% in 2011.
- Rising household headship rates for those aged over 40 may be due in part to lower house prices when they were younger, and perhaps also to the ongoing effect of higher rates of divorce, as well as a general increase in the number of one-person households.

Sources and notes

- ONS Census data 2001 and 2011

2.10. Younger households are now much more likely to rent than to own

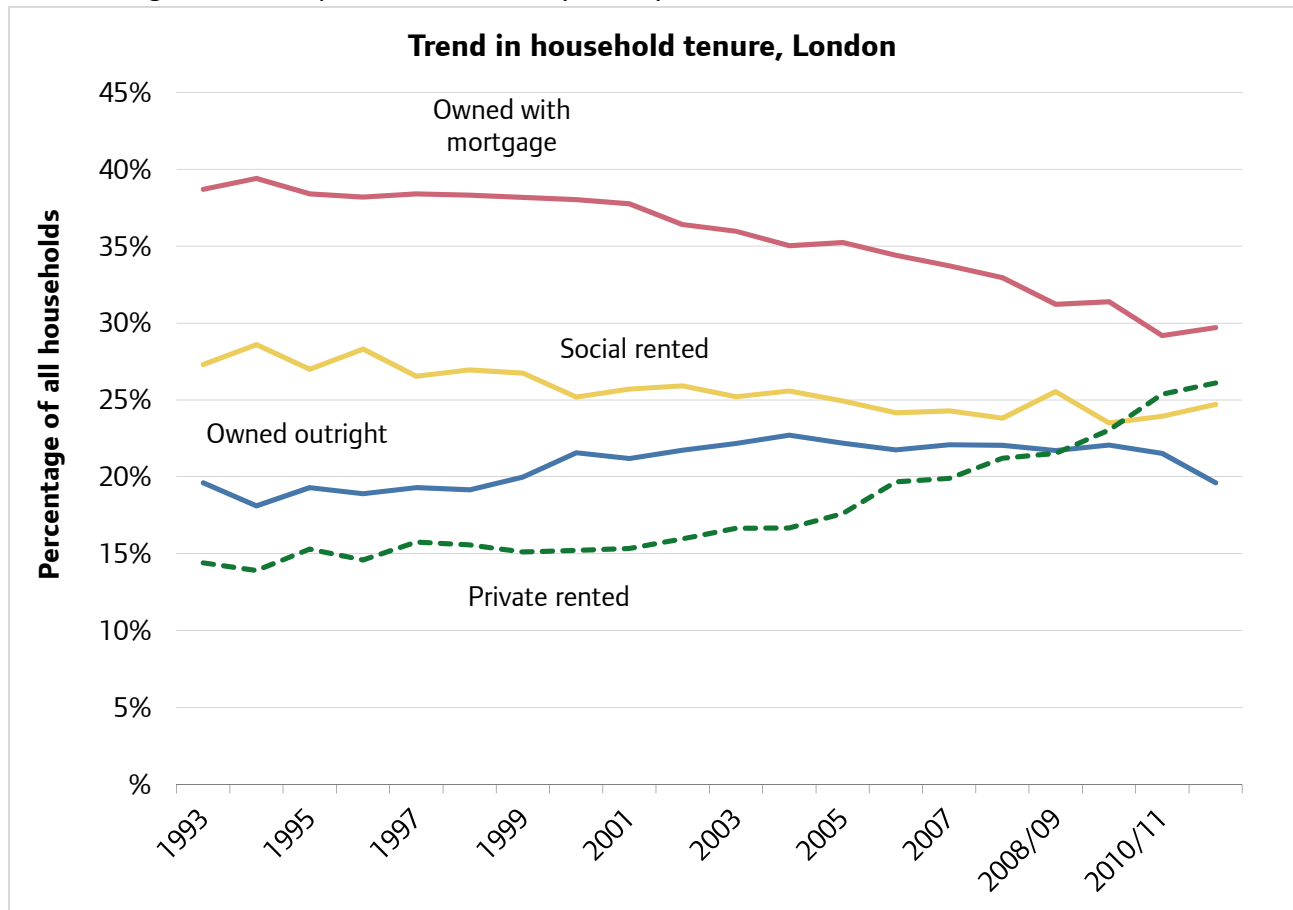


- In 2001 owner occupation was the largest tenure for younger households (those headed by someone aged up to 34), but the owner occupation rate for younger households fell sharply over the decade and by 2011 more than half rented in the private sector, with a quarter owning their home and 20% in social housing.
- There was also a fall in the owner occupation rate and an increase in private renting for older households (those with heads aged 35 or above), but not as dramatic.
- Just as striking is the discrepancy between absolute growth numbers: the number of older households rose by around half a million over this period, while the number of younger household grew by only 27,000 despite rapid growth in the younger population.

Sources and notes

- ONS Census data 2001 and 2011
- 'Household head' refers to Household Reference Person

2.11. The drop in London's home ownership rate has mainly affected those with a mortgage, while outright ownership remains relatively steady

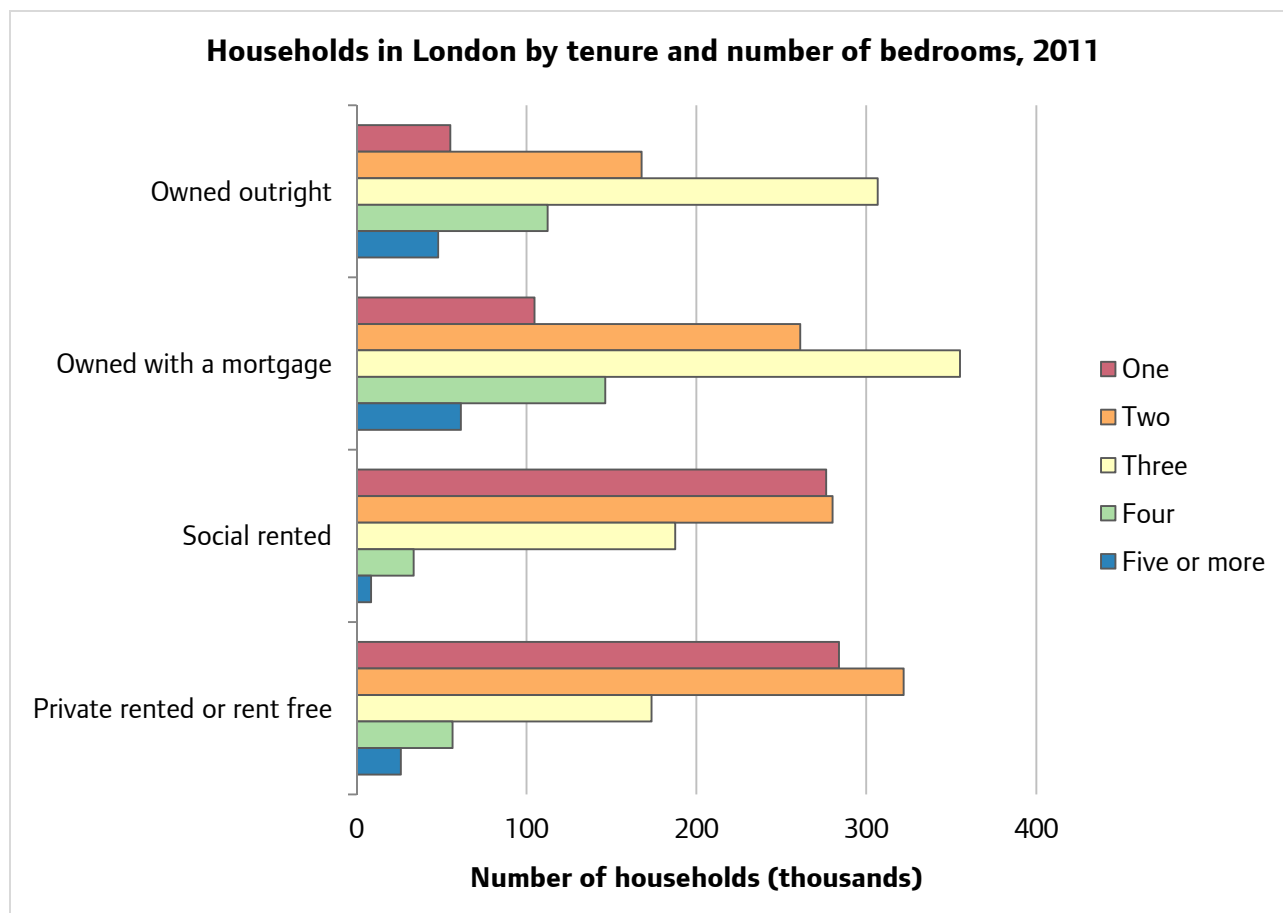


- While London's overall owner occupation rate has fallen by around ten percentage points since the early 1990s, this is entirely due to a drop in the proportion of households who own their home with a mortgage. Almost 40% of households had a mortgage in 1993 but by 2011/12 this has fallen to 30%.
- In contrast, the proportion of households who own their home outright has remained relatively steady at around 20%.
- Around 26% of households rent privately, up from 14% in 1993. Social renting was for a long time the second largest tenure but is now slightly smaller than private renting.

Sources and notes

Data from Survey of English Housing (1993 to 2007) and English Housing Survey (2008/09 to 2012/13)

2.12. Owner occupying households tend to live in larger homes than private or social tenants

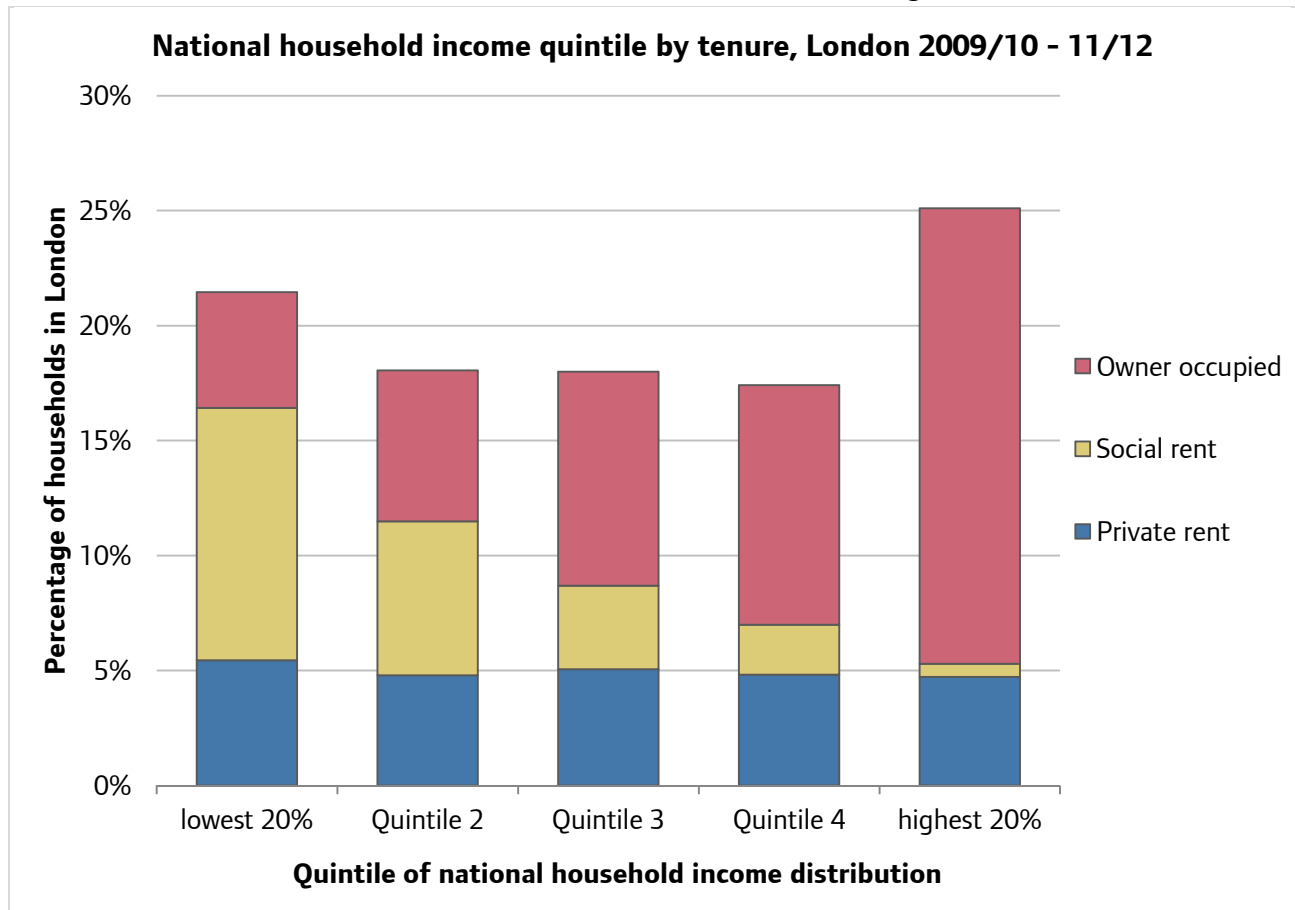


- While most new housing built in London in recent years has been smaller homes with one or two bedrooms, these still comprise only 54% of London's housing stock (excluding vacant homes).
- Just over 1.5 million homes, or 46% of London's total, have three bedrooms or more. Two thirds of these are owner occupied.
- The distribution of sizes varies greatly by tenure. 64% of owner occupied homes (including shared ownership) had three bedrooms or more while around 70% of both social and private rented homes had just one or two bedrooms.

Sources and notes

ONS, Census 2011

2.13. London's private rented sector accommodates households on a wide range of incomes, while low income households are concentrated in social housing



- Compared to the country as a whole, London has a relatively unequal distribution of household income, with a quarter of London households in the top 20% of national household incomes and a relatively large proportion of households in the poorest quintile.
- Private renting households are spread very evenly throughout the national income distribution, with a fifth of them in each national income quintile.
- But there are huge differences in the income distribution of the other two tenures, with social renting households predominantly low-income and owner occupiers predominantly high-income.

Sources and notes

- English Housing Survey data, 2009/10 to 2011/12
 - The income definition used is EHS Basic Income, which refers to the annual net income of the Household Reference Person and any partner from wages, pensions, other private sources, savings and state benefits, after tax and national insurance but excluding any housing related benefits or allowances

2.14. Only half of private tenants in London are satisfied with private renting, though far more are satisfied with their accommodation

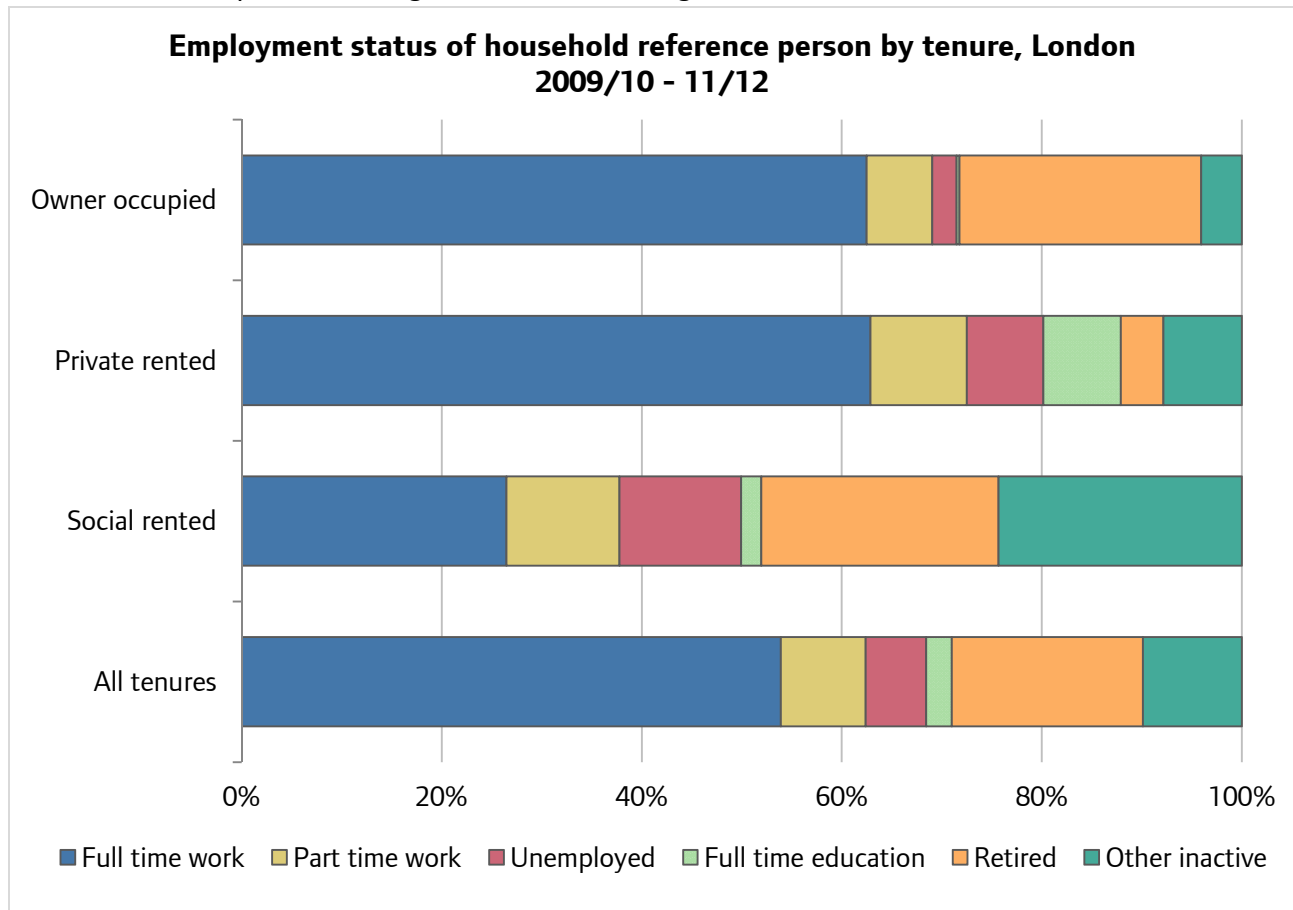


- Owner occupiers in London are overwhelmingly satisfied with both their accommodation and with homeownership in general. Satisfaction levels are lower for social tenants, of whom around three quarters are satisfied with their accommodation and a similar proportion with their tenure.
- The most striking pattern is among private tenants, of whom 81% are satisfied with their accommodation but only 49% are satisfied with renting privately, a disparity that may be driven by frustrated aspirations to homeownership.
- Across all tenures 85% of households in London are satisfied with their accommodation and 78% with their tenure.

Sources and notes

- English Housing Survey data, 2009/10 to 2011/12

2.15. Patterns of economic activity vary widely across tenures, with unemployment lowest in owner occupation and highest in social renting

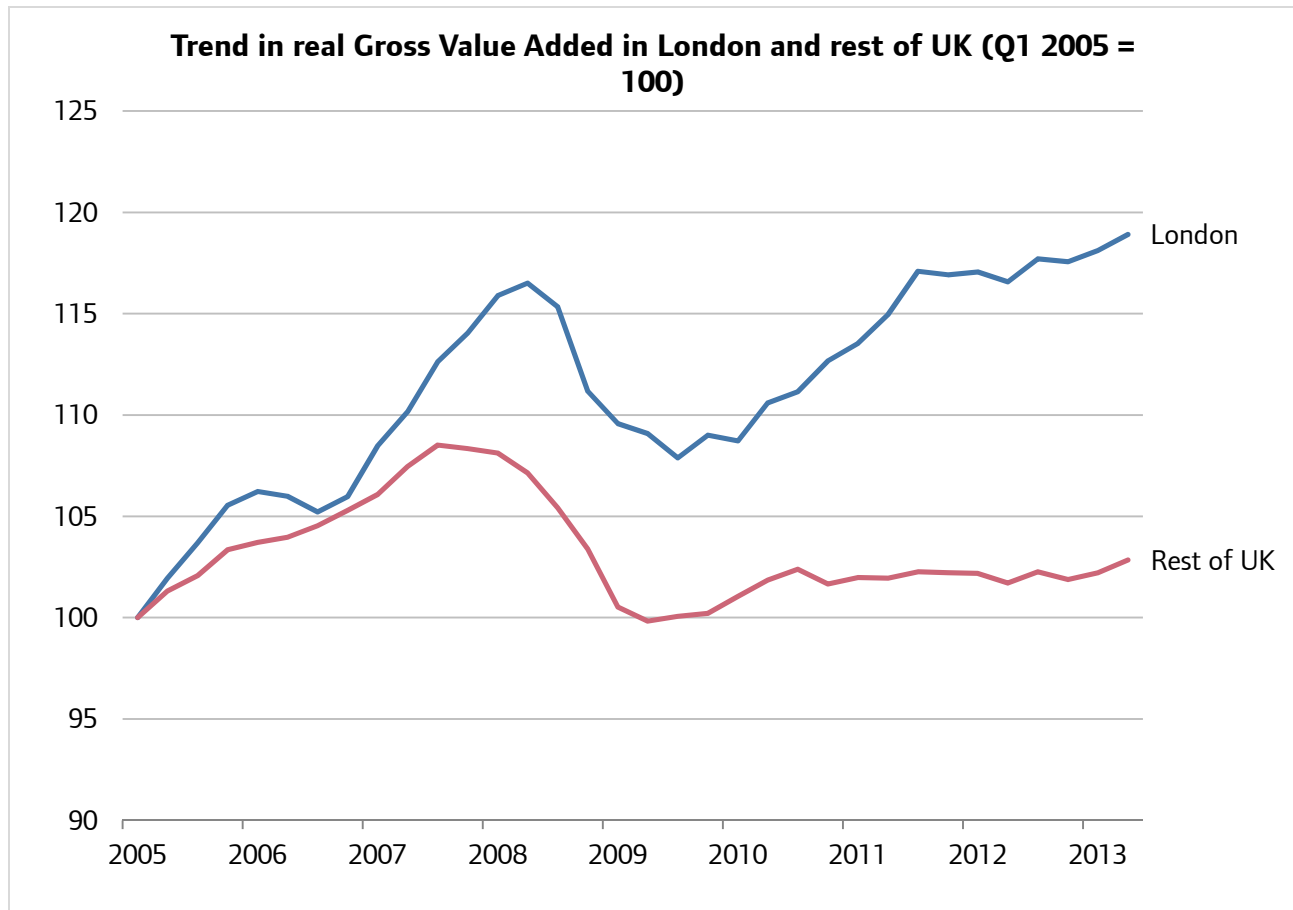


- Across all tenures, 62% of Household Reference Persons (HRPs) are in work, 6% unemployed, 3% in full time education, 19% retired and 10% otherwise economically inactive.
- Private renting has the highest proportion of HRPs in work (72%), the lowest who are retired (4%) and the highest in full time education (8%). Owner occupation has a similar proportion of HRPs in work (69%) but many more who are retired (24%).
- Social renting has the lowest proportion of HRPs in work (37%) and the highest who are 'otherwise economically inactive' (24%) - perhaps due to disability or long-term illness.

Sources and notes

- English Housing Survey data,
2009/10 to 2011/12

2.16. London saw faster economic growth than the rest of the UK both before and after the last recession



- London's economy grew considerably faster before the recession, with GVA rising by 17% in real terms between Q1 2005 and Q2 2008 compared to 7% in the rest of the UK.
- London has also recovered more quickly from the recession, with growth in GVA of 10% since mid-2009 compared to only 3% in the rest of the UK.
- Real terms GVA in London passed its previous peak of output in late 2012. In contrast, economic output in the rest of the UK remains well below its peak.

Sources and notes

- Experian data provided to GLA

2.17. London's jobs market has also recovered very strongly, adding a quarter of a million jobs in the last year alone



- Employment in London fell sharply in the last recession, with the number of jobs falling by 3% between September 2008 and September 2010, compared to 2% in the rest of England.
- But London subsequently saw a much stronger recovery, with 11% growth in jobs between September 2010 and September 2013, compared to 2% in the rest of England.
- Employment growth in London has been particularly rapid in the last year, with an estimated 257,000 workforce jobs added.
- Within London employment growth has been focused on central London, with Westminster, Tower Hamlets and the City of London accounting for 57% of jobs growth between 2000 and 2011.

Sources and notes

- ONS workforce jobs at regional level
- Borough data from London Datastore

3 Housing supply and empty homes

Over the last decade, London's housing stock grew by 0.8% a year, faster than Paris or New York but much more slowly than Tokyo (3.1). New house building in London is recovering from the effects of the recession, with 21,900 net conventional completions in 2012/13, but remains well below its peak in 2008/09 (3.2). Housing supply is likely to increase in the near future, with gross new house building starts rising to almost 20,000 in 2013 (3.3). But the current rate of new house building is well below growth in both population and jobs (3.4).

At neighbourhood level the housing stock grew across most of London between 2001 and 2011, but fell in several areas undergoing significant estate renewal (3.5). At borough level, Tower Hamlets saw by far the biggest growth in its housing stock, with a 35% increase between 2001 and 2012 (3.6). A net 62,620 new homes were completed in the last three years, with both total supply and tenure splits varying widely at borough level (3.7). Over the same period thousands of extra homes have been created by converting larger homes into multiple smaller ones – and a smaller number lost through the opposite process (3.8).

A quarter of new homes built last year had three or more bedrooms, up from 15% five years ago (3.9). New homes were completed at an average density of 120 per hectare in 2012/13, compared to a peak of 136 in 2009/10 (3.10).

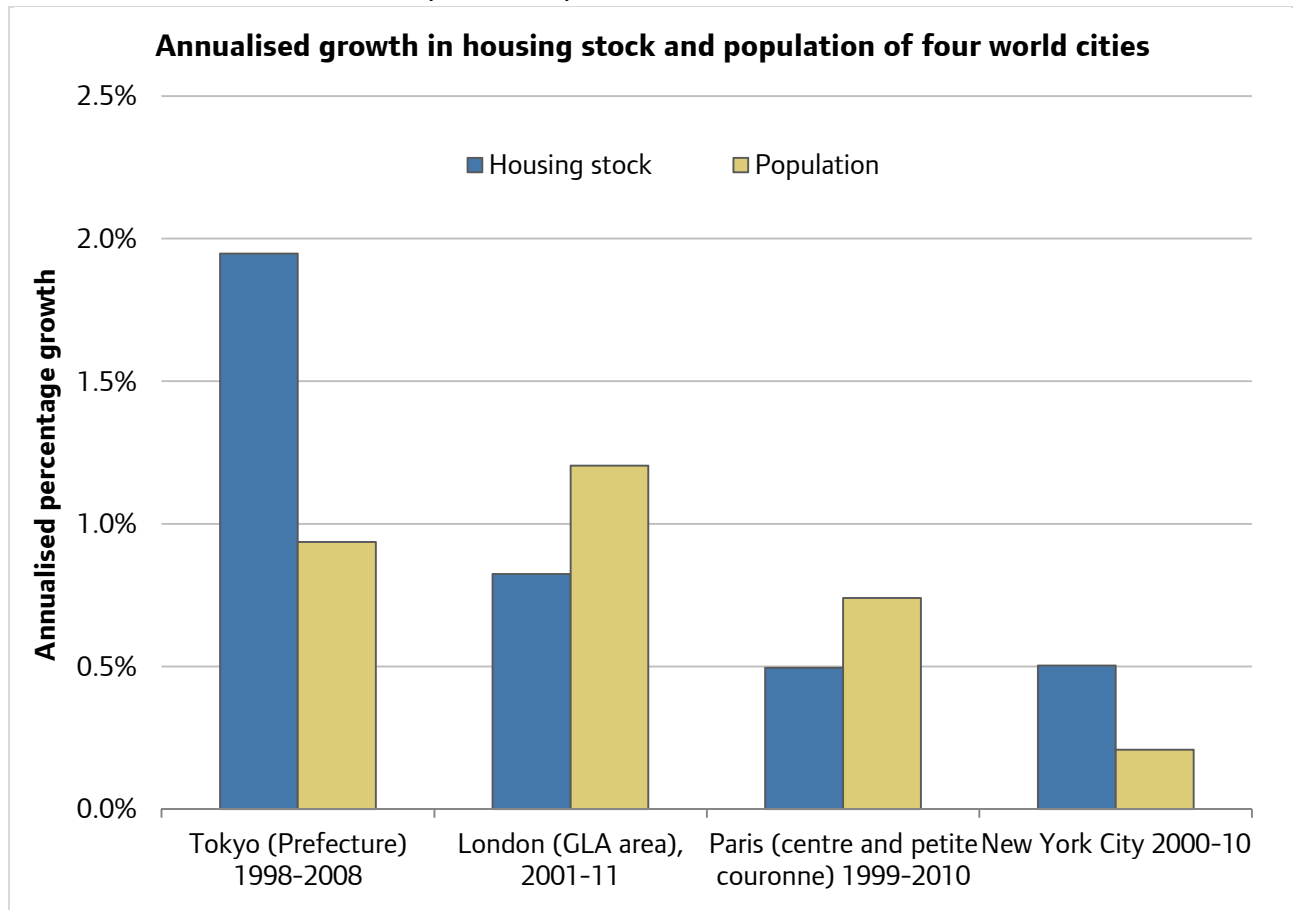
Planning approvals for new homes reached a new peak in 2011/12 but then fell sharply in 2012/13, perhaps in reaction to the new Community Infrastructure Levy (3.11). London has a planning 'pipeline' of 216,500 homes either under construction, or approved but not yet started (3.12).

Around 8,700 affordable homes were delivered in 2012/13, down from a record level of 17,200 in 2011/12 (3.13). The vast majority of affordable homes delivered in 2012/13 were new build, whereas a decade ago many were acquisitions of existing homes (3.14). Almost 40,000 affordable homes were delivered across London in the last three years, with the highest numbers delivered in East London boroughs (3.15). While the number of publicly funded affordable homes completed fell in 2012/13, the number started more than doubled (3.16). There were around 1,400 Right to Buy sales in London in 2012/13, an increase from recent years but far below the levels of the 1980s and 1990s (3.17).

Inner London has the highest level of support for new house building in the country, while Outer London has the lowest (3.18). Patterns of new housebuilding are also influenced by conservation policies, with around 15% of land in London in a conservation area (3.19).

The number of empty homes in London is at a historically low level, at just over 2% of the total stock (3.20). The proportion of housing without usual residents is highest in London's most expensive neighbourhoods (3.21). London has a much lower vacancy rate in its private sector housing than other parts of the country, while vacancy rates for affordable housing are broadly similar (3.22). Four boroughs account for half of all London's second homes (3.23).

- 3.1. Over the last decade, London's housing stock grew by 0.8% a year, faster than Paris or New York but much more slowly than Tokyo

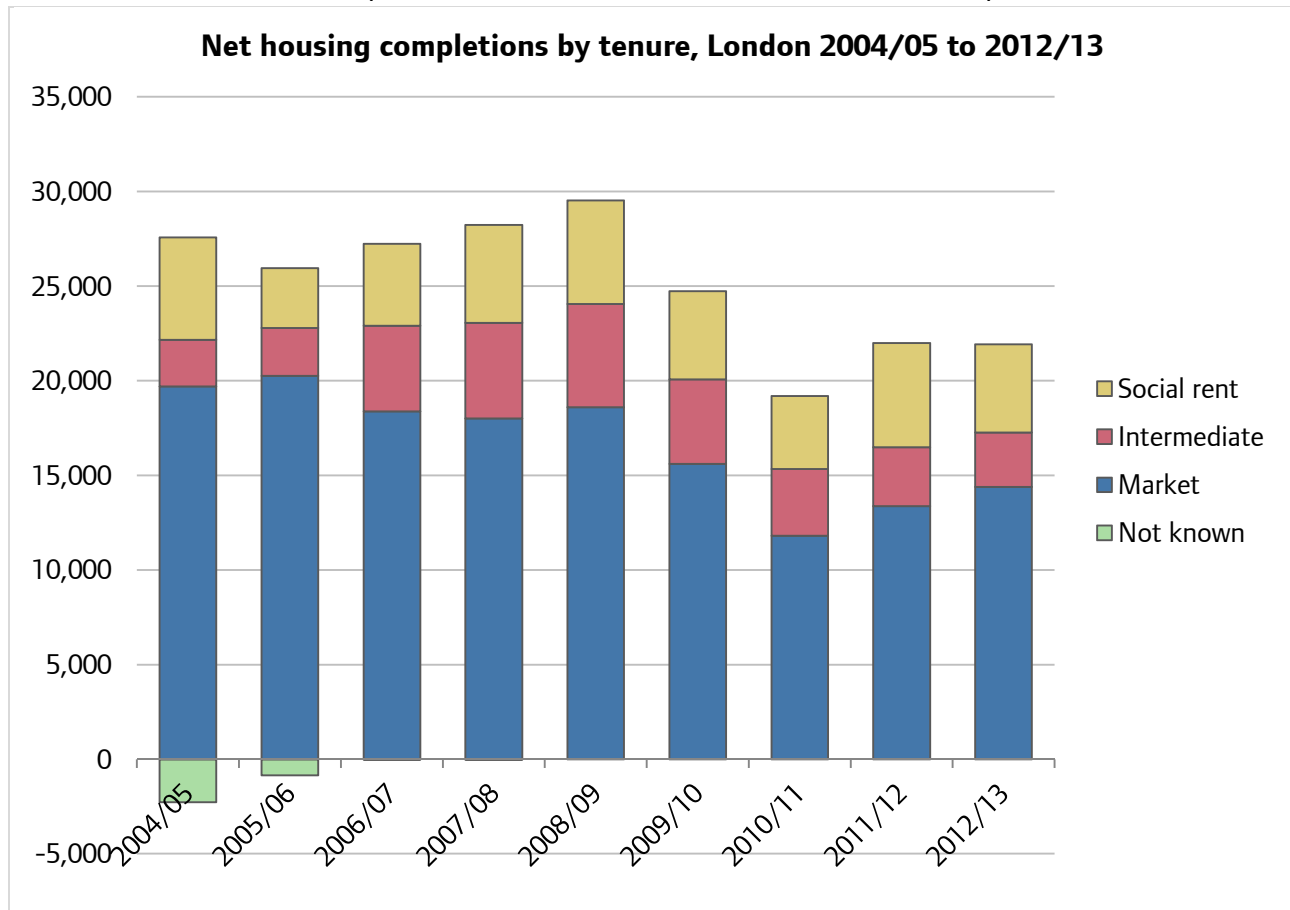


- This chart compares annualised growth in the housing stock and population in four 'world cities', across timescales and scales that are as consistent as possible.
- In common with London, Tokyo, Paris and New York all experienced growth in both population and housing over the last decade.
- But while London had the fastest population growth (over 1 per cent year), Tokyo built by far the most new homes, at a rate of 1.9% a year, compared to 0.8% in London and 0.5% in both Paris and New York.
- If London had grown its housing stock at the same rate as Tokyo it would have built around 60,000 new homes a year over the last decade.

Sources and notes

- Tokyo data from the Tokyo Statistical Yearbook, London data from Valuation Office Agency council tax statistics and Office for National Statistics mid-year population estimates, Paris data from the French Census, and New York data from the American Community Survey
- Populations of the selected areas at the end of each period were as follows: Tokyo 12.7m, London 8.2m, Paris 6.7m, New York City 8.2m

3.2. New house building in London is recovering from the effects of the recession, with 21,900 net conventional completions in 2012/13, but remains well below its peak in 2008/09

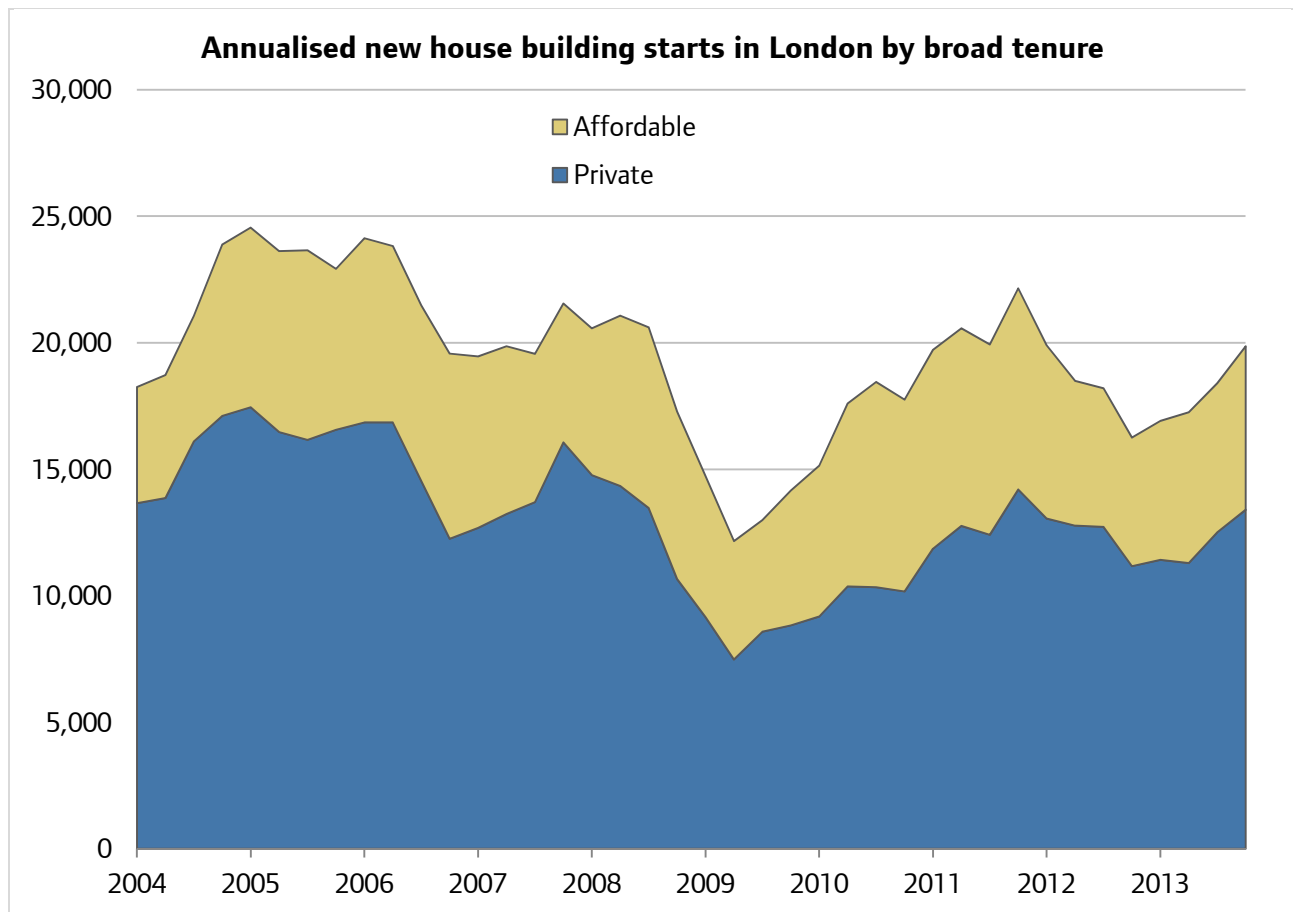


- Taking into account new building, conversions and changes of use, the number of new homes in London reached almost 30,000 in 2008/09 before falling to 19,100 in 2010/11 and recovering slightly to 21,900 in 2012/13.
- Since 2007/08 affordable housing's share of total net conventional supply has averaged around 37%, with a high of 39% in 2011/12 and a low of 34% in 2012/13.
- Social rented housing accounted for half of affordable housing supply in 2007/08, but its share increased to 62% in 2012/13 (including just over one hundred Affordable Rent properties)

Sources and notes

- GLA, London Development Database
- In 2004/05 and 2005/06 the negative supply of unknown tenure is due to the demolition of a number of homes for which the tenure was not recorded

3.3. Gross new house building starts in London rose to almost 20,000 in 2013

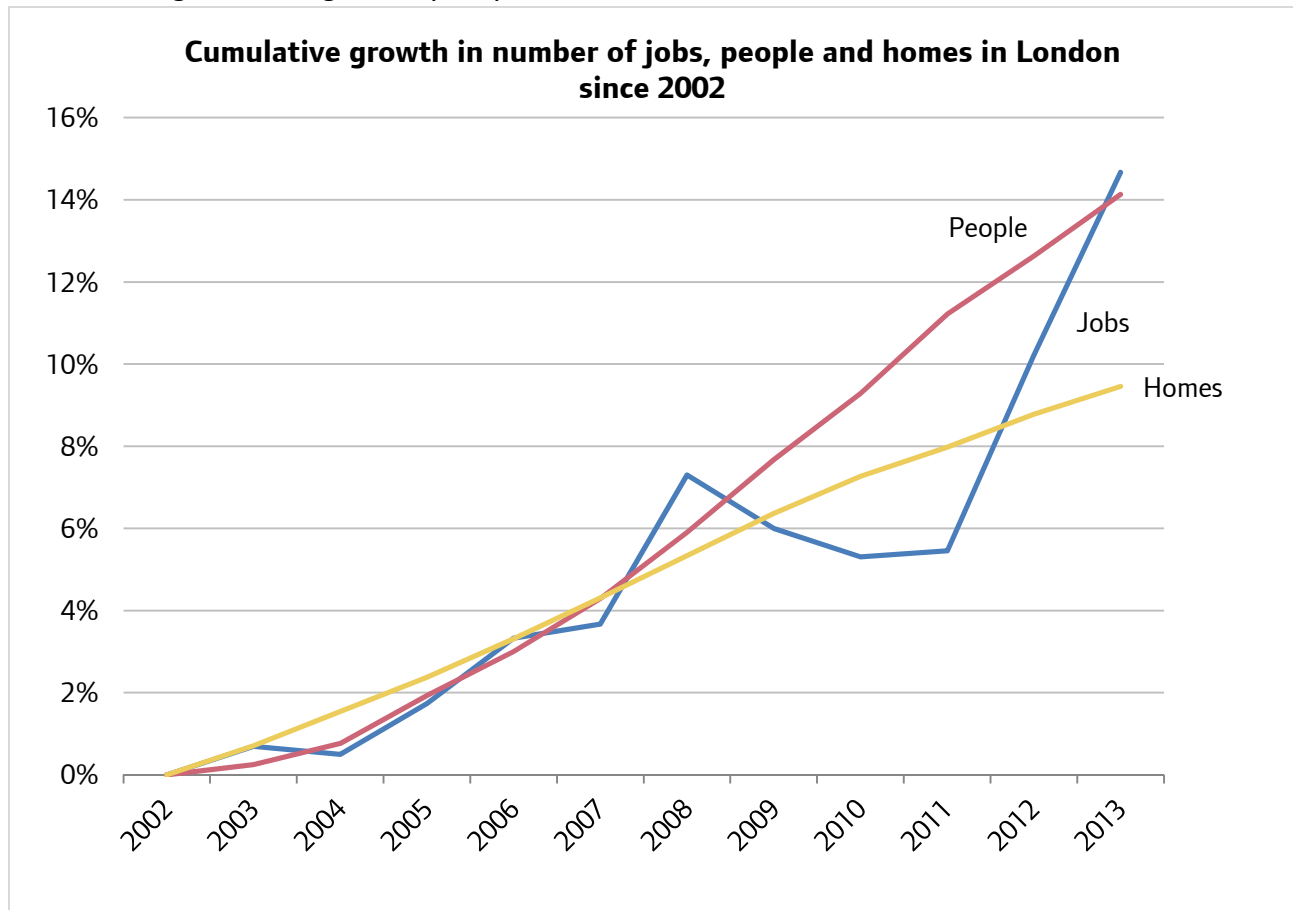


- There were 19,840 new build homes started in London in 2013, a 22% increase from the 2012 figure of 16,240.
- Of the new homes started in 2013, 13,400 were market homes and 6,460 were started by housing associations or local authorities.
- Looking over the last decade, annualised total new build starts peaked at 24,120 in the year to March 2006, fell to a low of 12,160 in the year to June 2009 and have since increased, though not yet to pre-recession levels.
- Other leading indicators of housing supply are also rising, with the National House Building Council recording a record 26,230 new home registrations in London in 2013, and new orders for housing construction in the capital reaching a value of £5.3 billion over the year.

Sources and notes

- DCLG, House building statistics

3.4. London's population has grown by 14% since 2002 and its number of jobs by 15%, but the housing stock has grown by only 9%

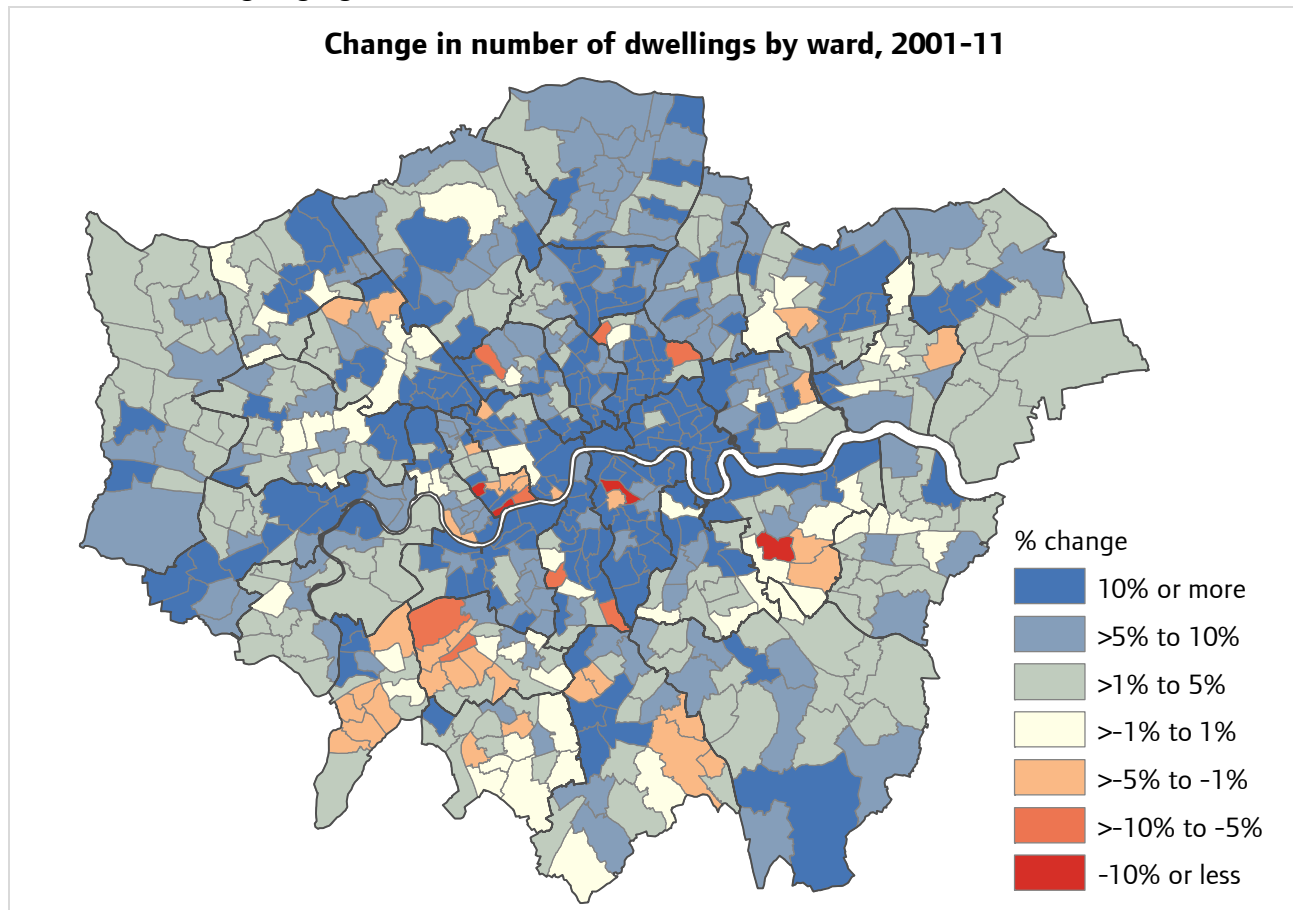


- This chart brings together trends in the number of people, jobs and homes in London between 2002 and 2013.
- All three have grown significantly over the period, but in the last few years population and employment growth have outpaced housing supply, which remain subdued in the aftermath of the recession.
- As of 2013 the population had grown by an estimated 14%, compared to 15% growth in jobs and 9% growth in the number of homes.

Sources and notes

- Jobs: ONS, Workforce jobs by industry, seasonally adjusted
- People: ONS, Mid-year estimates to 2012, with 2013 growth from GLA central population projection.
- Homes: Stock levels from DCLG housing live table 125, with 2013 growth from provisional London Development Database

- 3.5. The housing stock grew across most of London between 2001 and 2011, but fell in several areas undergoing significant estate renewal

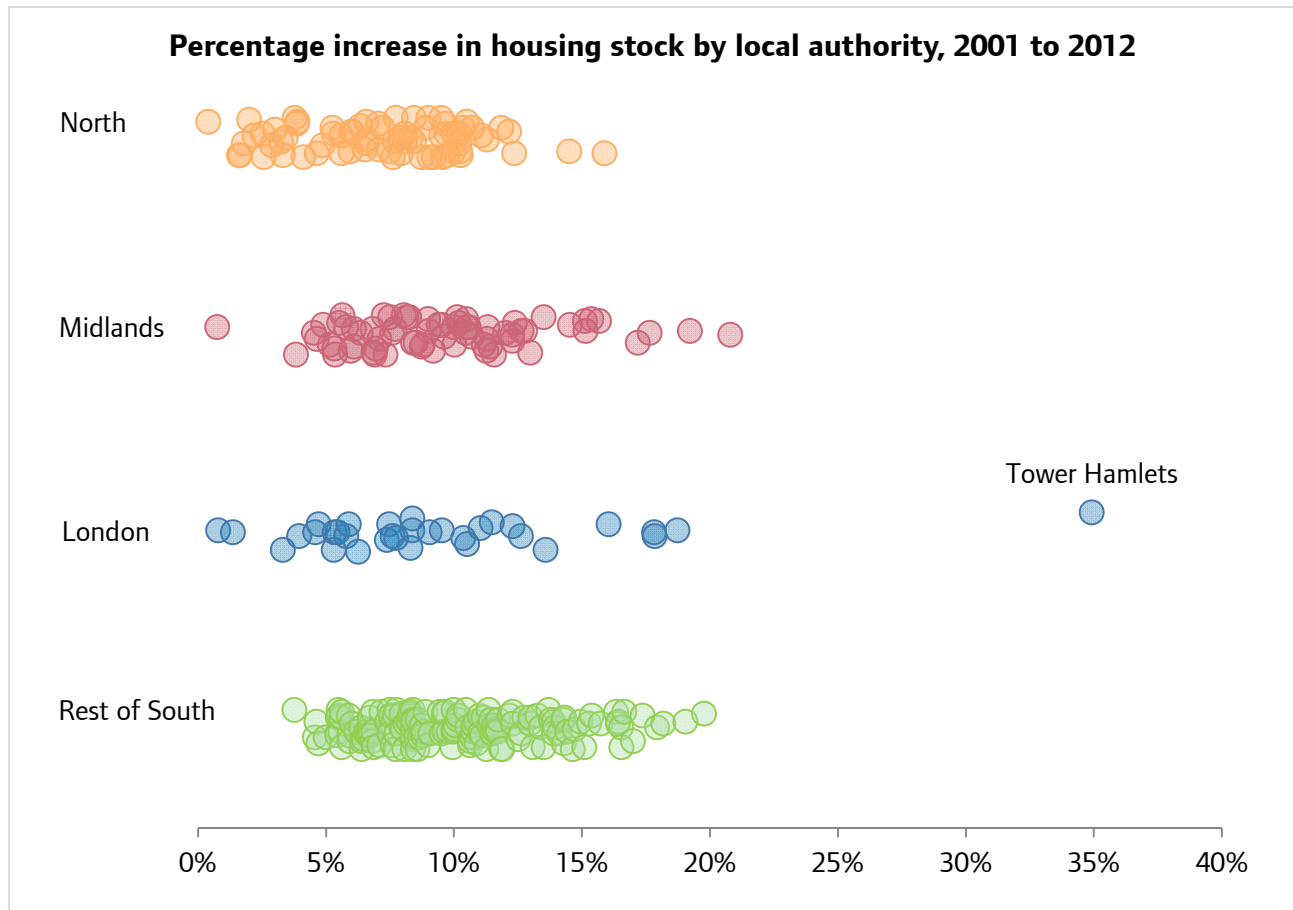


- The number of dwellings recorded in the Census grew in the vast majority of London wards between 2001 and 2011, with the highest percentage growth (95%) recorded in the Millwall ward of Tower Hamlets. Outside of Tower Hamlets the wards with the next highest growth rates were Church Street in Westminster (73%) and Royal Docks in Newham (58%).
- The largest decreases in the dwelling stock were seen in areas undergoing significant estate renewal (where homes had been demolished and had yet to be replaced by the time of the Census), notably Eltham in Greenwich (location of the Kidbrooke Estate), Cremorne in Kensington and Chelsea and East Walworth in Southwark.

Sources and notes

- ONS, Census 2001 and 2011

- 3.6. At borough level, Tower Hamlets saw by far the biggest growth in its housing stock, with a 35% increase between 2001 and 2012



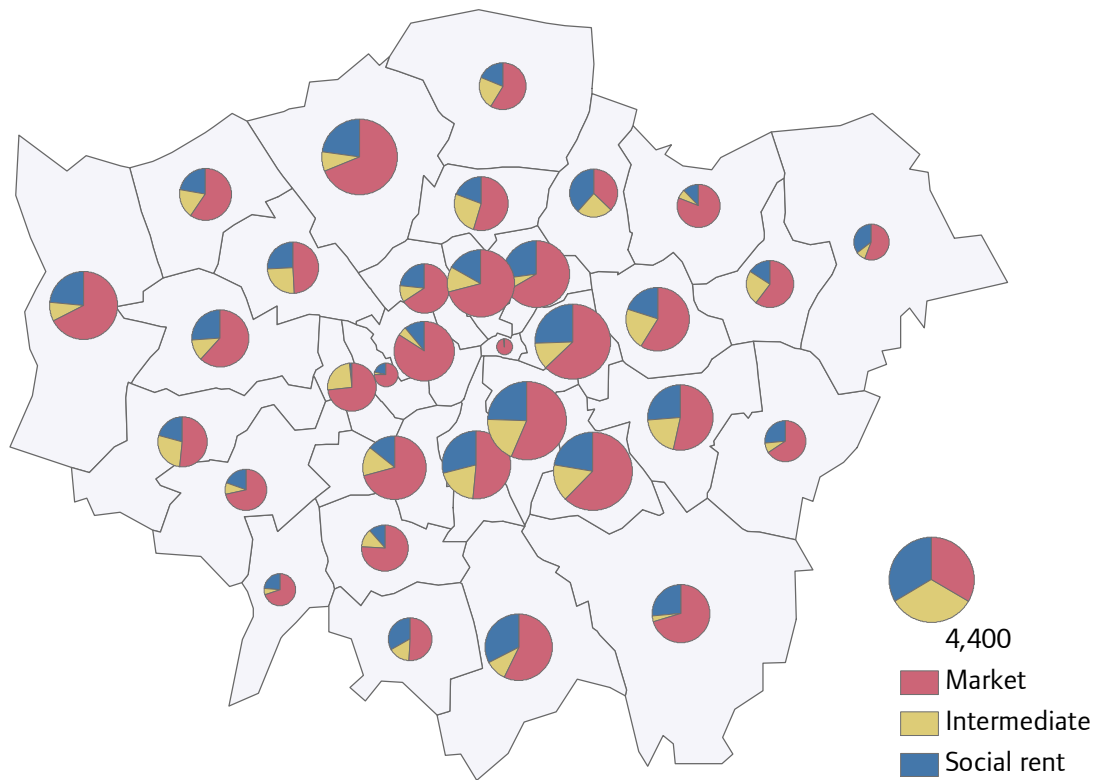
- Housing supply in London, as measured by the net change in the dwellings stock between 2001 and 2012, is highly variable among London boroughs. Tower Hamlets had by far the fastest housing growth in the country over this period at 35%, but London also had two of the slowest growing boroughs in Merton and Kensington and Chelsea (both 1%).
- Across England as a whole, housing supply was generally higher in the South than in the Midlands and the North. Perhaps surprisingly, every local authority in England saw an increase in its housing stock over this period, though there will have been some small areas where more homes were demolished than built.

Sources and notes

- DCLG, *Housing live table 125*

- 3.7. A net 62,620 new homes were completed in London in the last three years, with both total supply and tenure splits varying widely at borough level

Net conventional completions by borough and tenure, 2010/11 to 2012/13



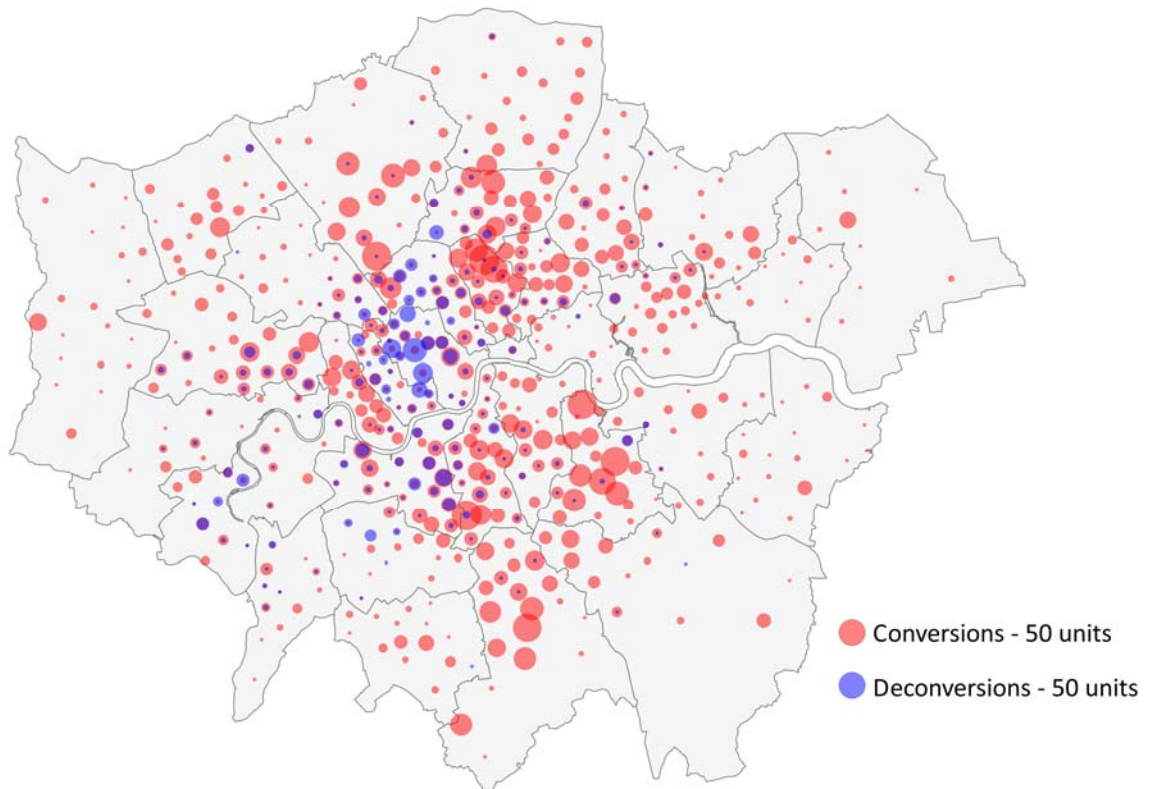
- Over the last three years (2010/11 to 2012/13) a net 62,620 new homes have been completed in London, of which 39,360 or 63% were market homes. Of the remaining affordable homes, 14,160 or 61% were social housing (including 120 Affordable Rent homes built in 2012/13) and the remainder intermediate.
- At borough level the highest numbers of completions were in the two neighbouring boroughs of Southwark and Lewisham with 3,730 each. The boroughs with the fewest completions were the City of London with 160 and Kensington and Chelsea with 340.
- The map also shows the tenure split of completions in each borough. Over this period the highest proportions of affordable housing were in Waltham Forest and Brent (63% and 51% respectively) and the lowest (apart from the City of London at 1%) in Westminster and Kensington and Chelsea (16% and 23% respectively).

Sources and notes

- GLA, London Development Database
- Data for 2012/13 is provisional

- 3.8. In the last three years thousands of extra homes have been created by converting larger homes into multiple smaller ones – and a smaller number lost through the opposite process

Completions from conversions and deconversions by ward, 2010/11 to 2012/13

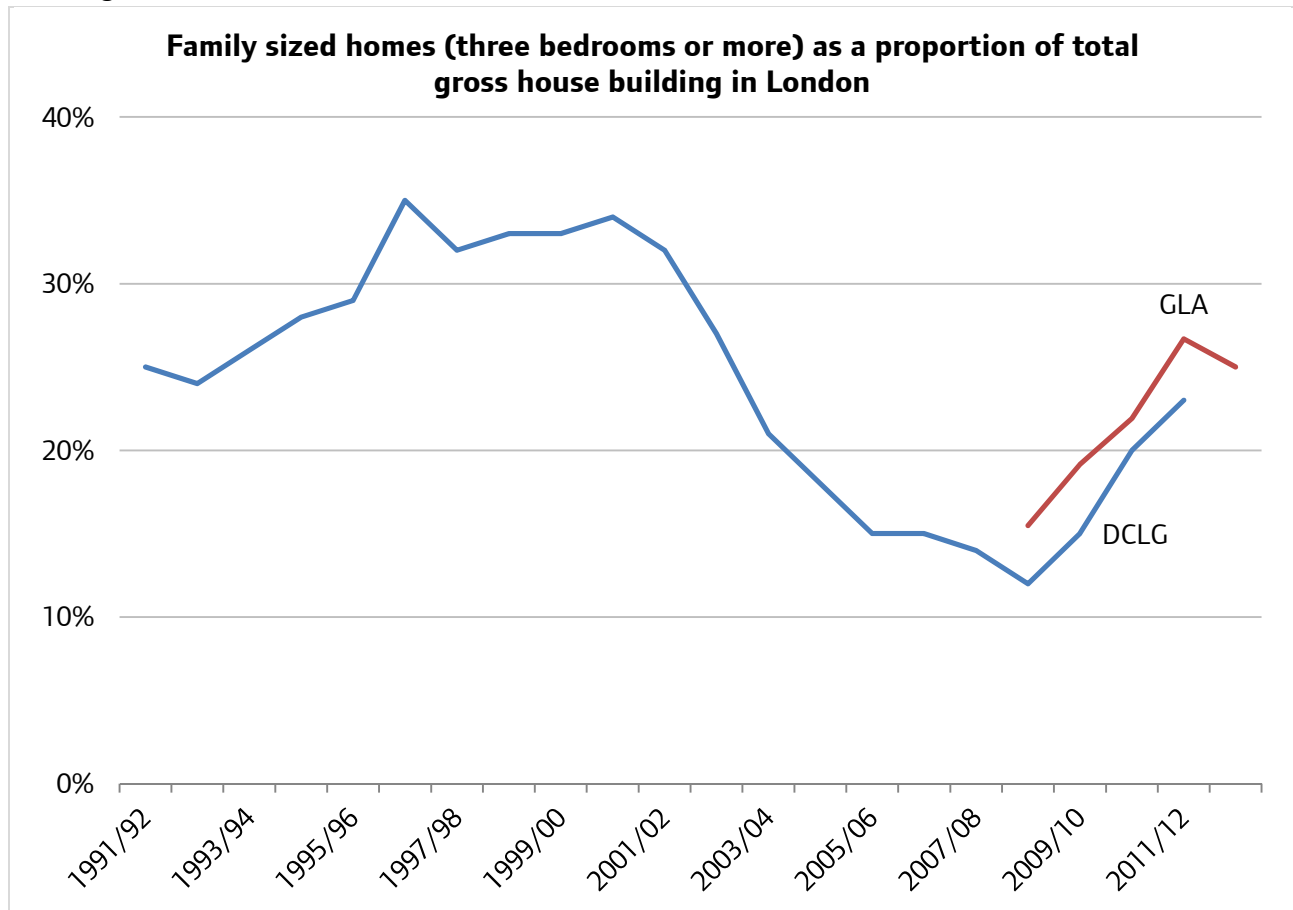


- The London Development Database records new supply from conversions of a single larger home into two or more smaller ones, as well as 'deconversions' of smaller homes into one larger one.
- Between 2010/11 and 2012/13 a net 4,940 homes were created through conversions (3,300 existing homes turned into 8,240 new ones) and a net 820 homes were lost through deconversions (1,580 existing homes turned into 750 new ones).
- Conversions were most common in accessible Inner London locations, and deconversions in high price areas. The ward with the most conversions in this period was Finsbury Park in Islington with 65, followed by closely by St. Leonard's in Lambeth with 64. The three wards with the highest numbers of deconversions were all in Westminster - Hyde Park (with 41), Knightsbridge and Belgravia (28) and Bayswater 25.

Sources and notes

- London Development Database

3.9. A quarter of new homes built last year had three or more bedrooms, up from 15% five years ago

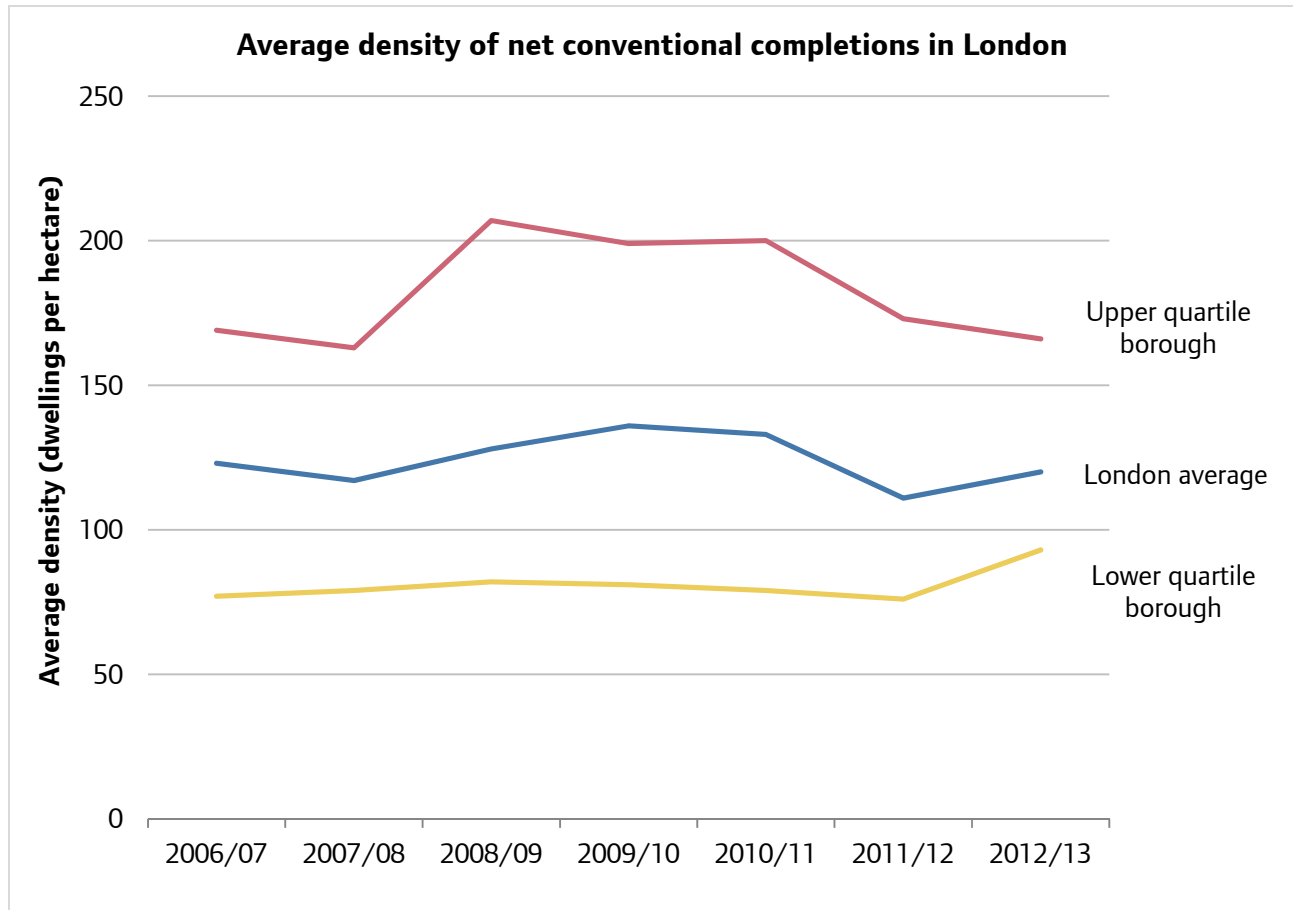


- The proportion of new homes with three bedrooms or more (the usual definition of 'family sized') in London rose to just over a third at the turn of the century, but fell rapidly through the 2000s as the share of smaller flats increased.
- With the end of the housing boom and the associated credit crunch, speculative investment in new flatted developments fell back and the proportion of family sized homes rose again.
- The increase in the size of the average new home means that even though the number of new homes built in 2012/13 was 18% lower than in 2008/09, the number of bedrooms in new homes was only 11% lower.

Sources and notes

- DCLG, *Housing live table 254* (discontinued in 2011/12), *London Development Database*

3.10. New homes were completed at an average density of 120 per hectare in London in 2012/13, compared to a peak of 136 in 2009/10



- The average density of new homes in London (defined as conventional completions) rose from 123 dwellings per hectare (dph) in 2006/07 to a peak of 136 in 2009/10, and was 120 in 2012/13.
- Densities are far higher in Inner London, with Tower Hamlets seeing the highest density completions (apart from the City of London) in 2012/13 at 279dph and Bromley the lowest at 49dph.
- The upper quartile borough density figure was 166dph in 2012/13 and the lower quartile 93dph, both closer to the average than in recent years, indicating a more even spread of densities across London.

Sources and notes

- GLA, London Development Database

3.11. Planning approvals for new homes reached a new peak in 2011/12 but then fell sharply in 2012/13, perhaps in reaction to the new Community Infrastructure Levy



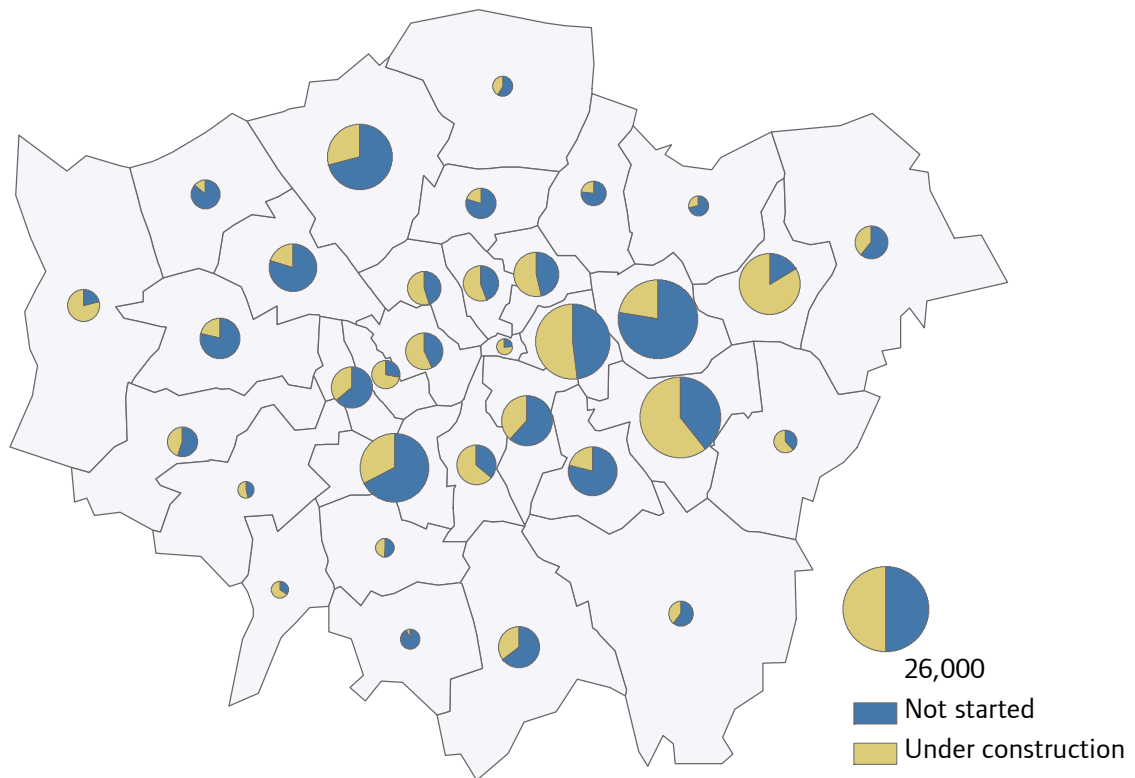
- The net number of new homes receiving planning approval in London is always higher than the eventual completions as some approvals are duplicates and others never complete.
- The level of approvals was very high in 2011/12 at 84,700, above the previous peak of 80,400 in 2007/08, but then fell sharply to 38,700 in 2012/13.
- This very high level of approvals in 2011/2 and the much lower figure in 2012/13 may both be a result of the introduction of the Mayor's Community Infrastructure Levy in April 2012, as some developers may have tried to bring forward planning applications to 2011/12 to avoid the levy (as indicated by a very high number of planning applications received in March 2012).

Sources and notes

- GLA, London Development Database

3.12. London has a planning 'pipeline' of 216,500 homes either under construction or approved but not yet started

Planning 'pipeline' of net conventional homes, 2013

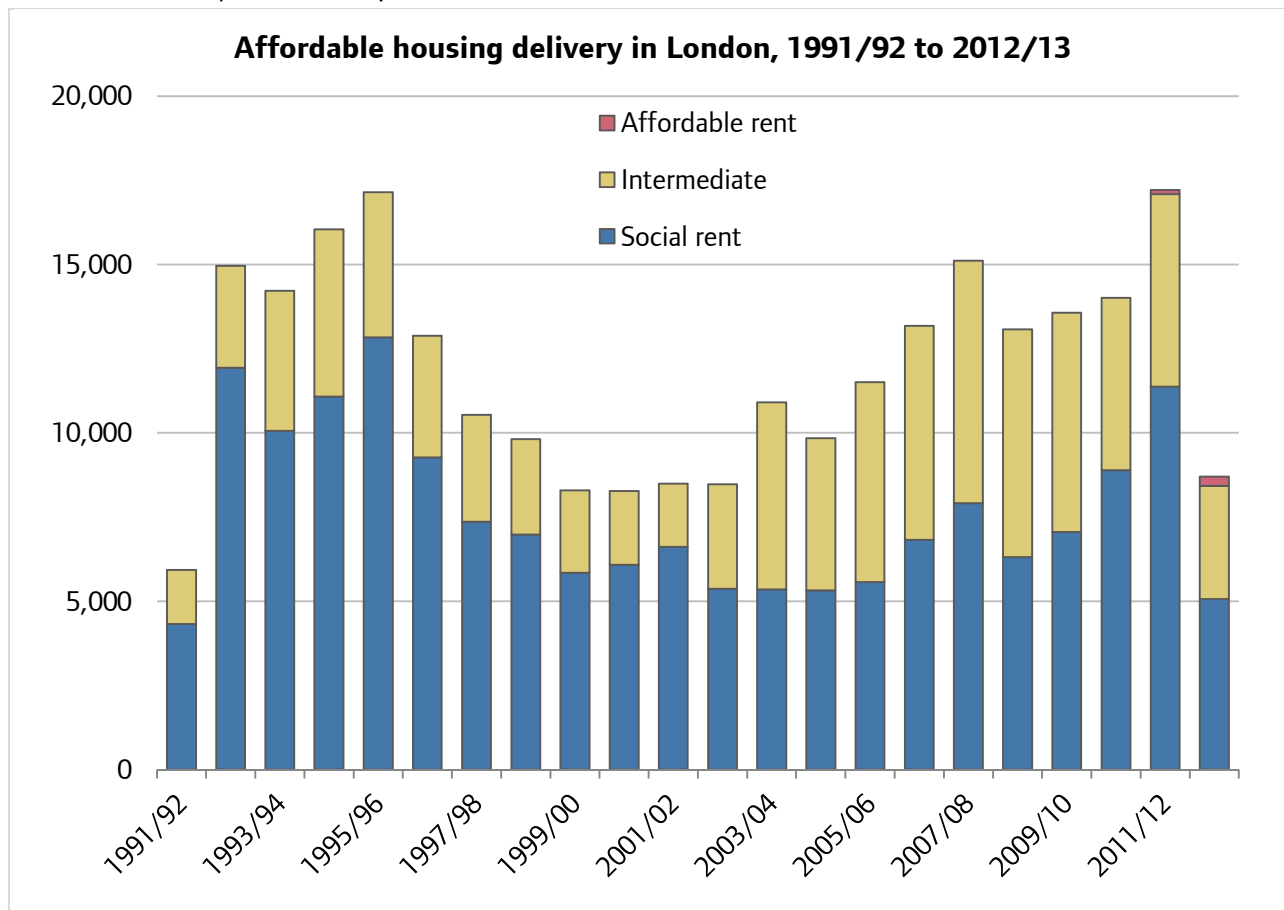


- Across London as a whole there is a planning 'pipeline' of 216,500 net new homes, comprising 93,500 under construction and 122,900 not yet started.
- At borough level the biggest pipelines are in Greenwich, with 23,500 homes (most of them under construction), and Newham, with 22,600 (split evenly between under construction and not yet started).
- Four of the boroughs with the smallest pipelines are in the South West. Merton, Sutton, Kingston upon Thames and Richmond upon Thames have a combined pipeline of 4,600 homes.

Sources and notes

- GLA, London Development Database
- In the LDD a 'start' is the point at which a planning permission can no longer lapse due to the borough acknowledging a legal start on site. This can be triggered by demolition of existing buildings or preparatory digging, and does not mean the start of physical construction work on an individual building.

3.13. Around 8,700 affordable homes were delivered in London in 2012/13, down from a record level of 17,200 in 2011/12

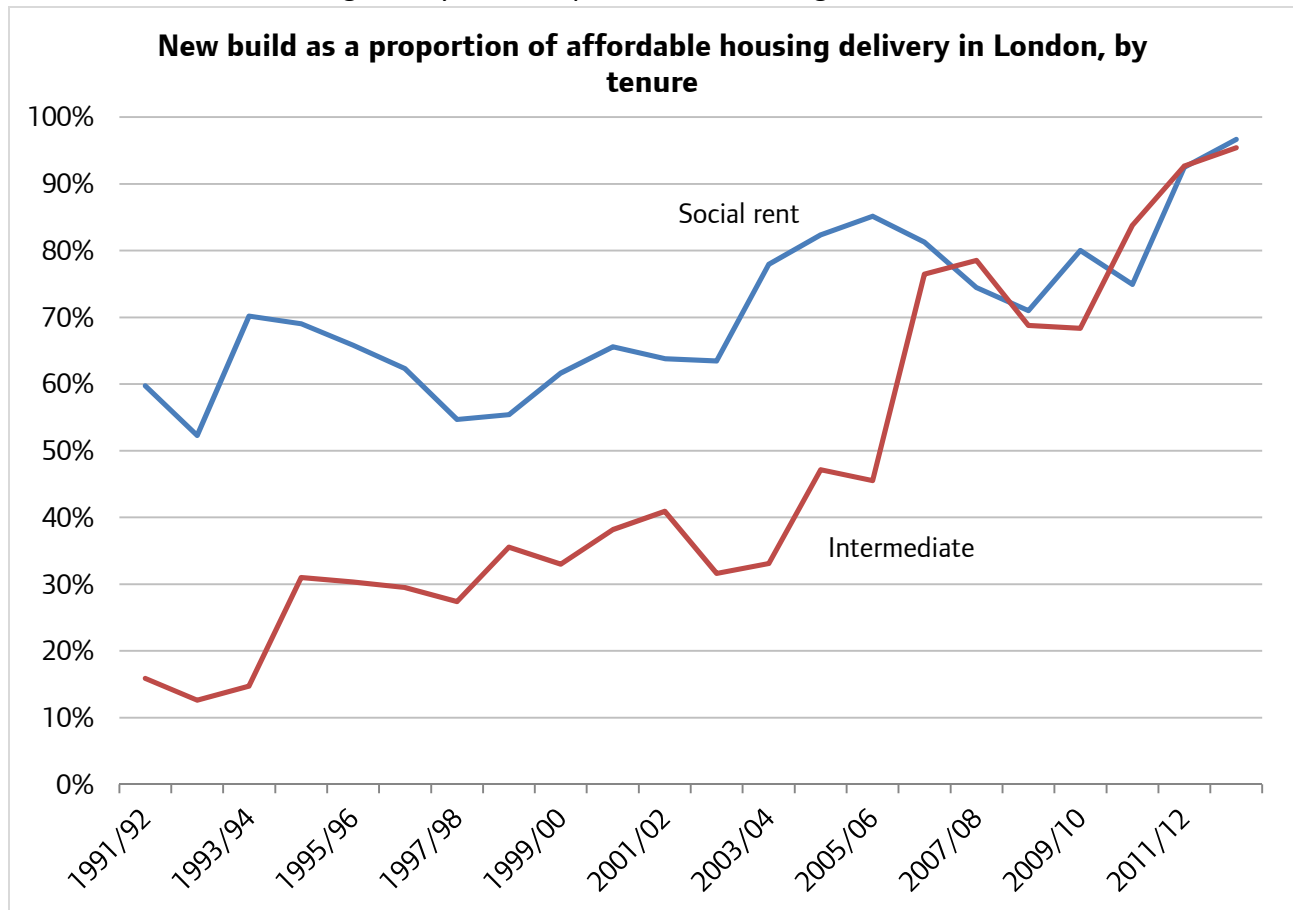


- There were 8,700 affordable homes delivered in London in 2012/13, just over half the 17,200 delivered in 2011/12, which was the highest figure since these records began in 1991/92.
- The drop in affordable housing delivery between 2011/12 and 2012/13 was due to the transition between two different affordable homes programmes. Affordable Rent will comprise the majority of the rented homes in the new programme, but in 2012/13 there were only 280 Affordable Rent homes delivered.
- In 2012/13 there were 5,060 social rented homes delivered (58% of the total) and 3,360 intermediate homes (39%).

Sources and notes

- DCLG, Affordable housing supply statistics
- Note, these statistics are gathered on a different basis to the net conventional completions measure used earlier in this chapter, as they include acquisitions and do not net off losses to the stock
- They also include some minor categories not included in the GLA's affordable housing statistics, such as Assisted Purchase Sales

3.14. The vast majority of affordable homes delivered in London in 2012/13 were new build, whereas a decade ago many were acquisitions of existing homes



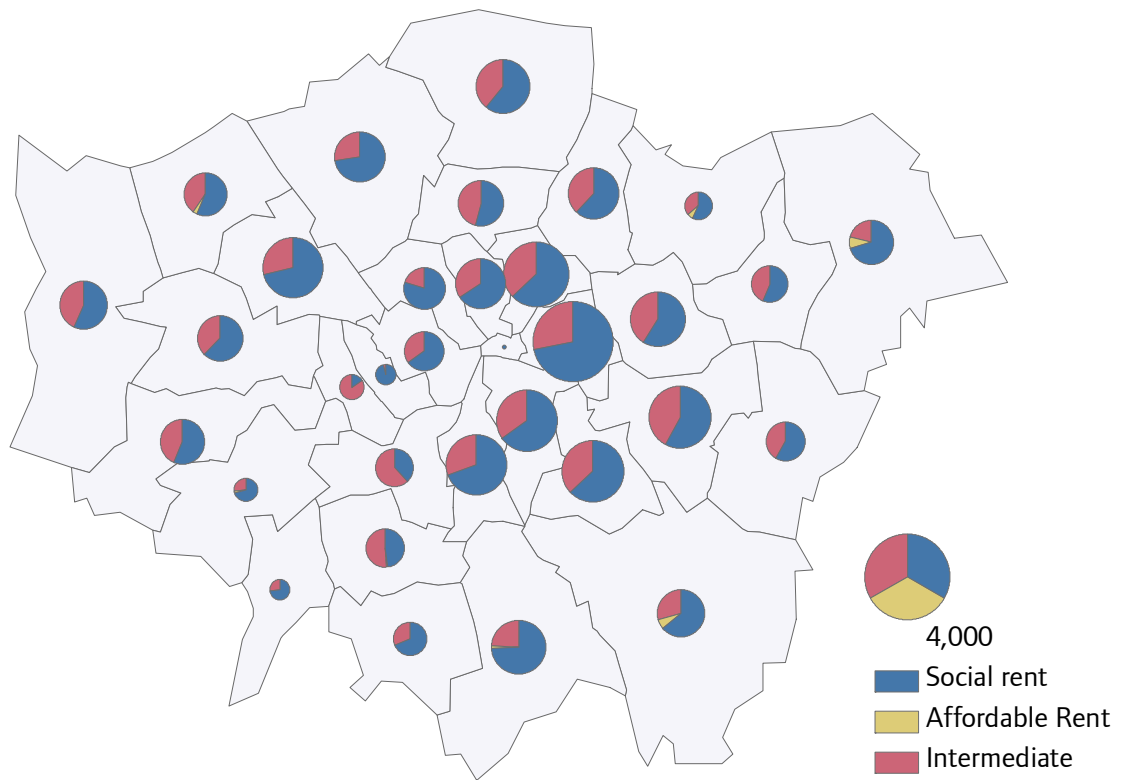
- Affordable housing delivery can include either newly built homes or existing private sector homes acquired for use as affordable housing.
- In previous years (particularly during the 1990s), acquisitions comprised a large share of affordable housing delivery in London, partly through social landlords acquiring homes on the open market and partly through various low cost home ownership schemes to help first time buyers.
- But in recent years acquisitions have comprised a much smaller share of delivery, and in 2012/13 97% of social rented homes and 95% of intermediate homes delivered were new build..

Sources and notes

- DCLG, Affordable housing supply statistics
- Each series excludes a small number of categories which are not entirely new build or acquisitions, such as PFI and 'other HCA schemes'
- 'Social rent' excludes Affordable Rent, of which there were only around 400 completions in 2011/12 and 2012/13

3.15. Almost 40,000 affordable homes were delivered across London in the last three years, with the highest numbers delivered in East London boroughs

Affordable housing delivery by borough, 2010/11 to 2012/13

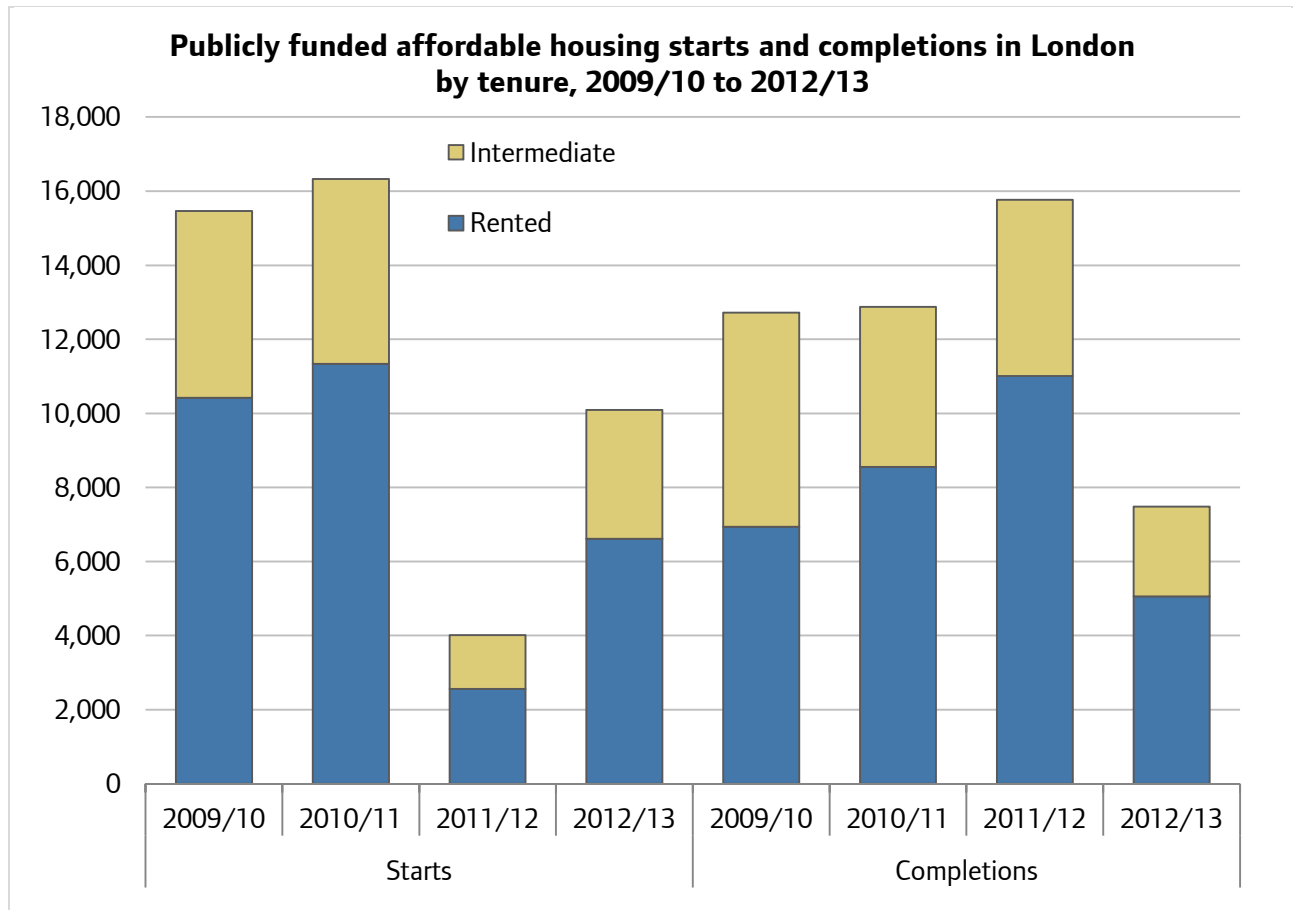


- There were 39,930 affordable homes delivered across London between 2010/11 and 2012/13.
- At borough level there was enormous variation in levels of affordable housing delivery, with 3,500 affordable homes delivered between 2010/11 and 2012/13 in Tower Hamlets (by far the highest borough total), compared to only ten in the City of London and 210 in Kingston upon Thames.
- The tenure mix of affordable housing also varies widely: for example, in the last three years social rented housing comprised 96% of delivery in Kensington and Chelsea, but just 16% in neighbouring Hammersmith and Fulham.

Sources and notes

- DCLG, *Affordable housing supply statistics*

3.16. While the number of publicly funded affordable homes completed fell in 2012/13, the number started more than doubled



- Just over 10,000 publicly funded affordable homes were started in London in 2012/13, more than double the number of starts in 2011/12, which was particularly low due to the transition between two different affordable homes programmes.
- Two thirds of the homes started in 2012/13 were for rent (mostly Affordable Rent), and the remainder were intermediate homes (predominantly First Steps homes for low cost home ownership).
- The number of completions fell in 2012/13 to just under 7,500, less than half the 2011/12 level, due to the impact of the low number of starts in 2011/12.

Sources and notes

- HCA and GLA, Affordable housing supply statistics
- These figures cover only homes funded by the HCA or GLA, and exclude some categories which are included in DCLG's affordable housing supply statistics, such as Assisted Purchase Sales
- Figures for 2009/10 to 2010/11 refer to homes 'sponsored' by London boroughs as recorded by the Homes and Communities Agency, and include a small number of homes located outside London. Figures for 2011/12 refer to homes located in London but exclude a small number of homes sponsored by authorities outside London.

3.17. There were around 1,400 Right to Buy sales in London in 2012/13, an increase from recent years but far below the levels of the 1980s and 1990s

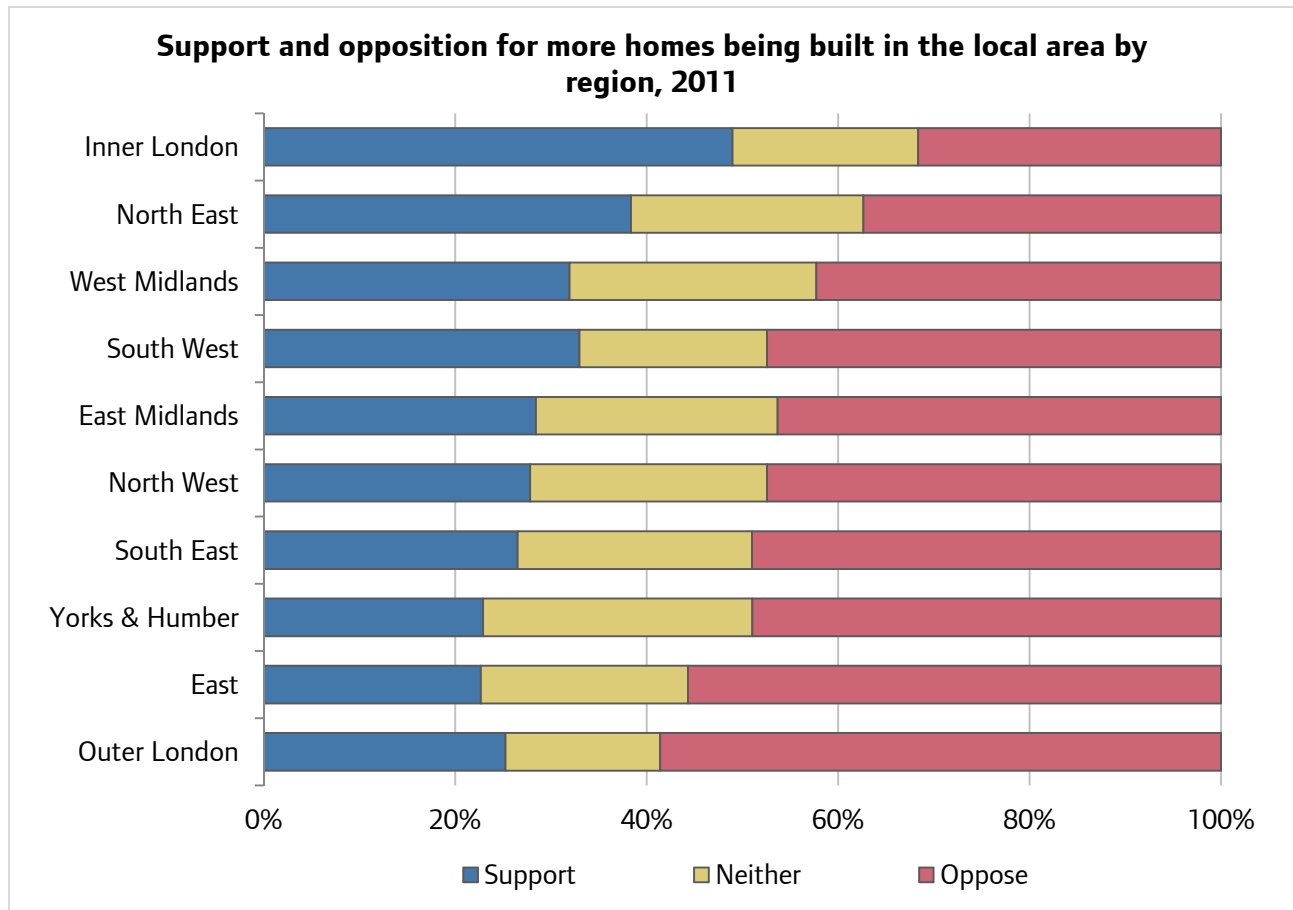


- 1,055 council-owned homes and 319 housing association homes were sold in London under the Right to Buy (and, in the case of housing association homes, the Right to Acquire) in 2012/13, for a total of 1,374.
- This is the highest number of sales since 2007/08, after several years in which sales were at a fraction of their levels in the 1980s and 1990s. Since 1981 almost 300,000 affordable homes have been sold to the sitting tenants in London, the vast majority of them formerly council-owned.

Sources and notes

- DCLG, *Housing live tables 670 and 68*; HCA, *Statistical Data Return 2012 and 2013*
- This trend includes housing association Right to Buy sales but not Right to Acquire until 2010/11. From 2011/12 no separate RTB and RTA statistics are available.

3.18. Inner London has the highest level of support for new house building in the country, while Outer London has the lowest

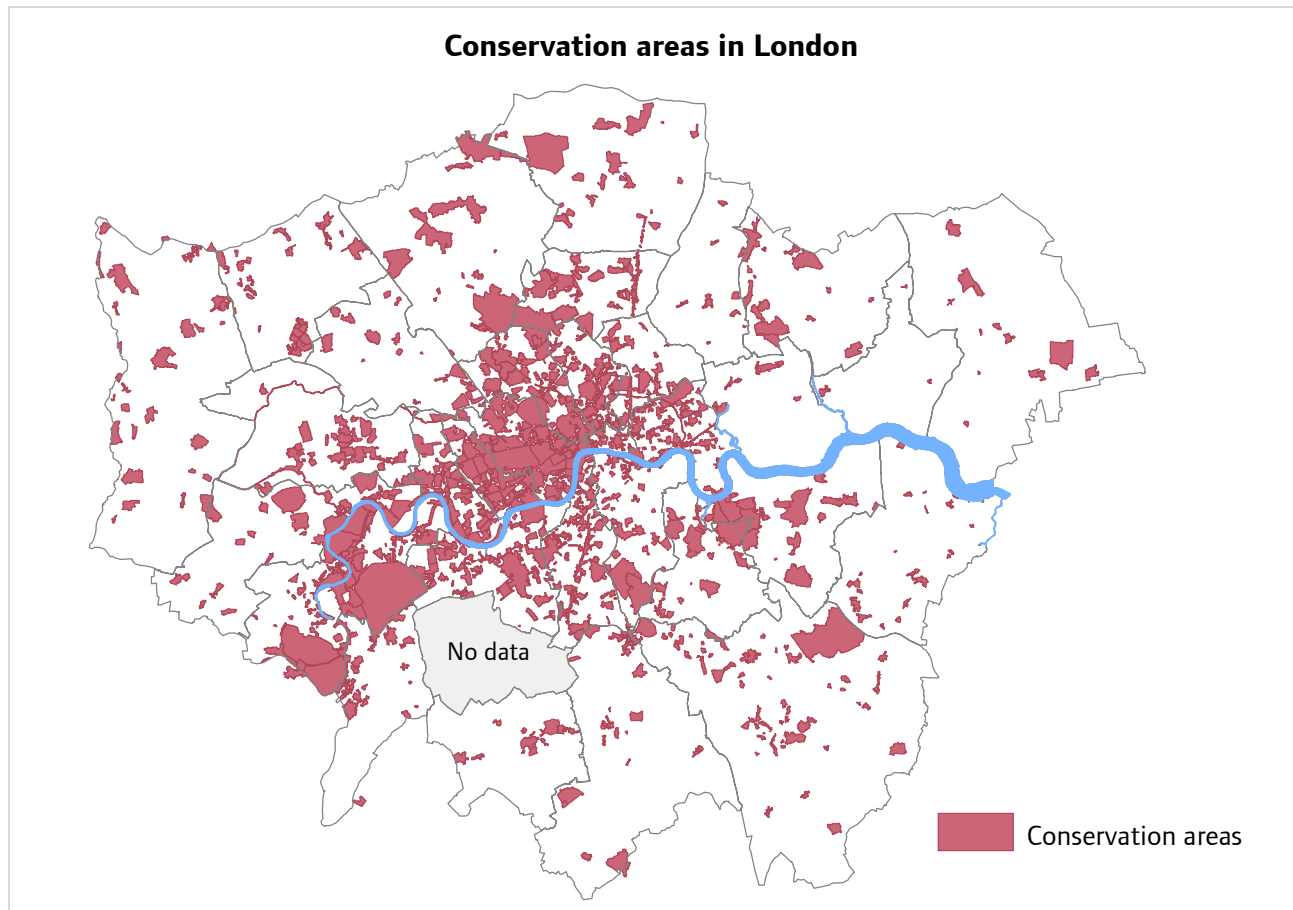


- Support for or opposition to more homes being built in the local area varies widely between regions and particularly so within London.
- In Outer London nearly 60% of respondents say they would oppose more homes being built in their area and 25% say they would be in support.
- On the other hand, Inner London is the only part of the country where support for new housing supply (48% of respondents) is substantially higher than opposition (31% of respondents), though still not in the majority.

Sources and notes

- DCLG, *Public attitudes to housing in England: Report based on the results from the British Social Attitudes survey, 2011*

3.19. Patterns of new housebuilding are also influenced by conservation policies, with around 15% of land in London in a conservation area

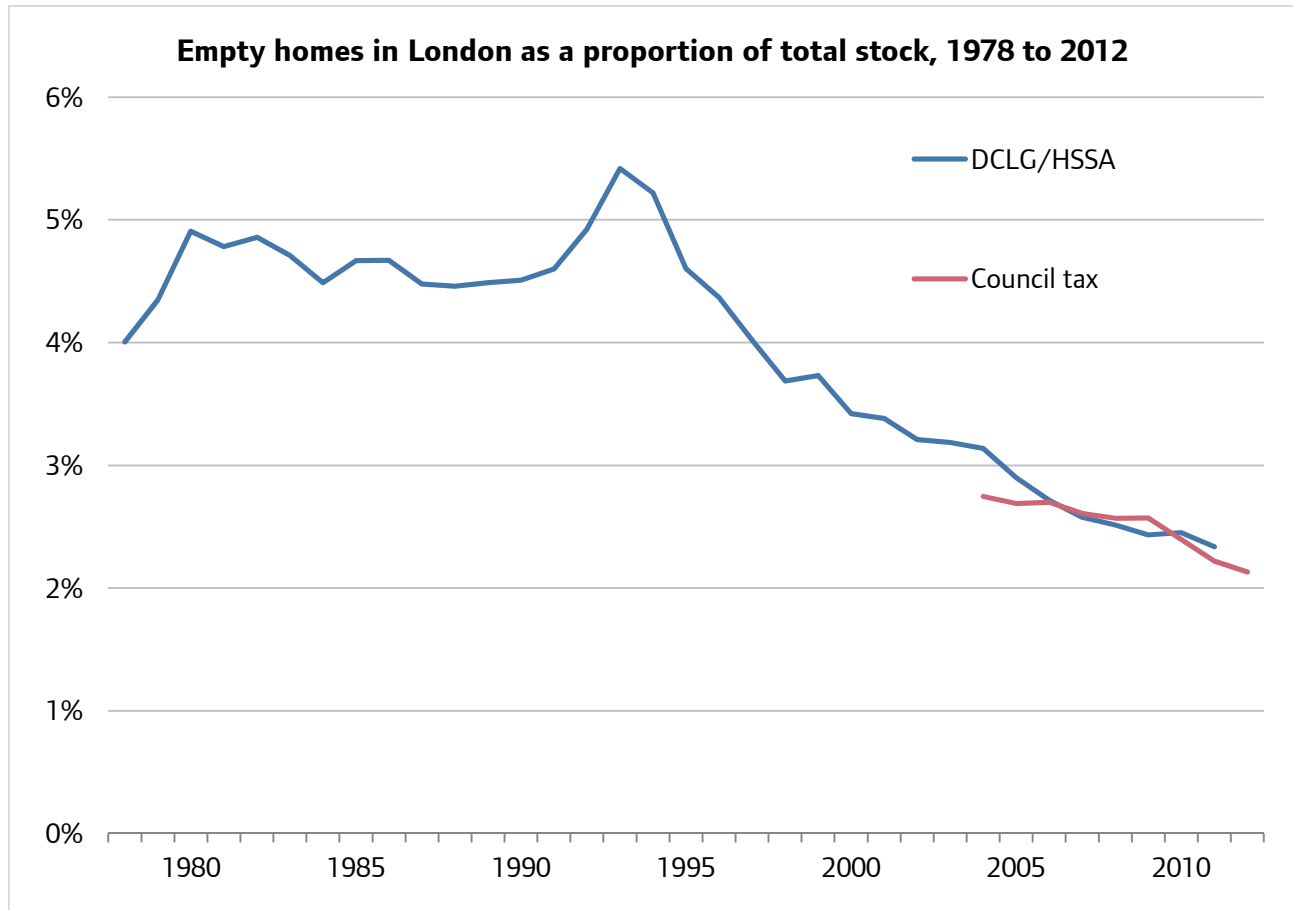


- An estimated 15% of the land in London is within a designated conservation area, a proportion which ranges from 1% in Barking and Dagenham to 72% in Kensington and Chelsea and 77% in Westminster.
- The first conservation areas in London were designated in 1967 and there are now 980 altogether (excluding Merton, for which there is no data currently available).

Sources and notes

- *English Heritage, Conservation area boundaries provided to GLA*

3.20. The number of empty homes in London is at a historically low level, at just over 2% of total stock



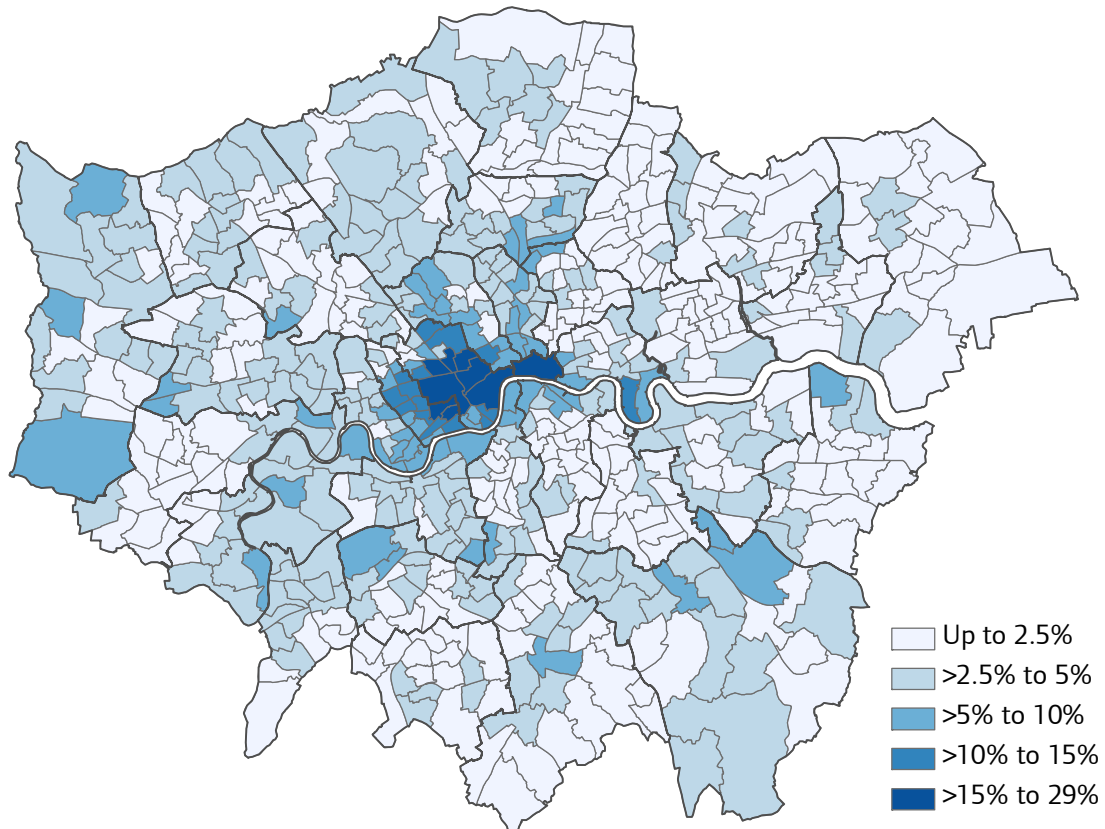
- According to council tax data there were 72,100 empty homes in London in 2012, equivalent to 2.1% of the total dwelling stock.
- Long term data (combining figures from DCLG, Housing Strategy Statistical Appendix submissions from local authorities and council tax) indicates that both the number of empty homes in London and their share of the total housing stock are at their lowest levels since at least 1978 (and probably well before then, given the fall in London's population after the Second World War), having fallen more or less continuously since a peak of 160,500 or 5.4% in 1993.
- In 2012 there were 21,850 homes in London that had been empty for more than six months, 0.6% of the stock and also a record low.

Sources and notes

- Data from 1978 to 2011 is a combination of historical data provided to GLA by DCLG and figures reported by local authorities in their Housing Strategy Statistical Appendix returns
- Data from 2004 to 2012 is from council tax statistics published by DCLG in Housing live table 615

3.21. The proportion of housing without usual residents (whether empty or second homes) is highest in London's most expensive neighbourhoods

Household spaces without usual residents as % of total by ward, 2011

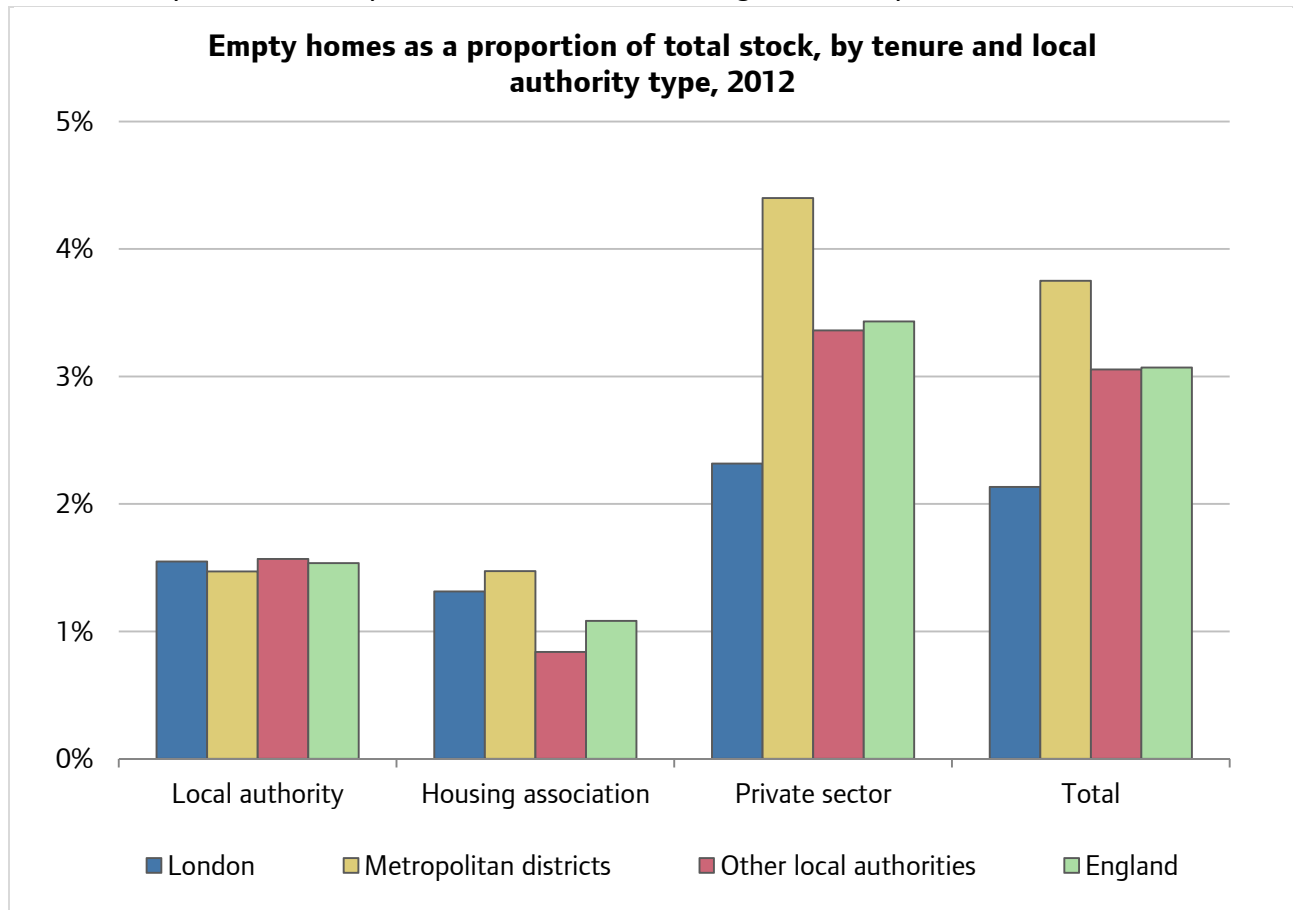


- The 2011 Census recorded 121,100 'household spaces without usual residents', where a household space is the accommodation used or available for use by an individual household and usual residents excludes short-term residents or visitors. The map therefore captures empty homes, second homes and accommodation used only by short-term residents.
- Across London as a whole only 3.6% of household spaces had no usual residents, but this proportion ranged from 0.5% in the Valley ward of Waltham Forest to 28.6% in the Knightsbridge and Belgravia.
- The fifteen wards with the highest proportions of household spaces without usual residents were all in the City of London (counted here as one ward), Westminster and Kensington and Chelsea.

Sources and notes

- ONS, 2011 Census data

3.22. London has a much lower vacancy rate in its private sector housing than other parts of the country, while vacancy rates for affordable housing are broadly similar



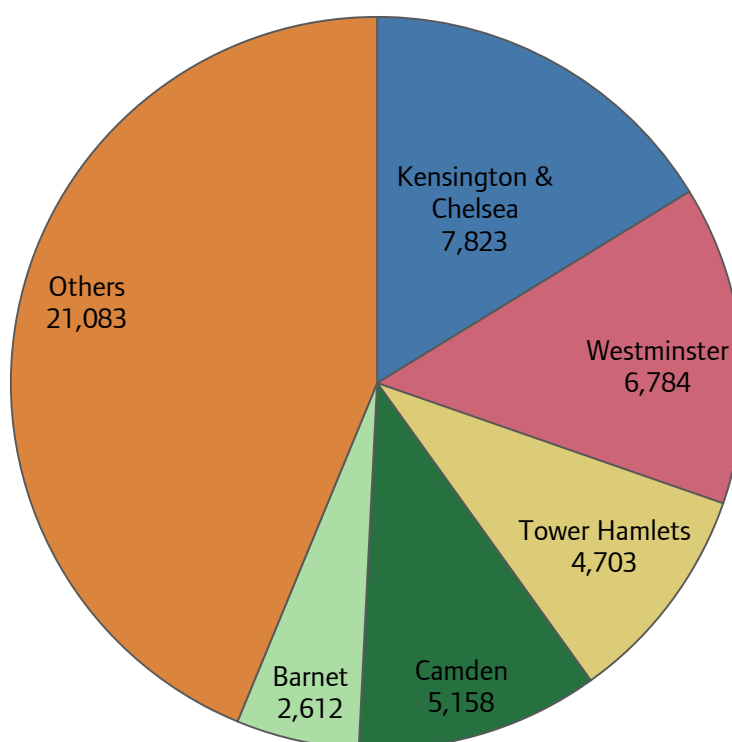
- Across all tenures, 2.1% of homes in London are empty, compared to 3.1% in England as a whole. The difference is most pronounced in the private sector: 2.3% of London's private sector homes are empty, compared to 4.4% in other metropolitan areas, 3.4% in non-metropolitan areas and 3.4% in England as a whole.
- Vacancy rates in London's affordable housing are lower, and similar to other parts of the country. 1.5% of London's local authority homes and 1.3% of its housing association homes are empty, compared to 1.5% and 1.1% respectively across the country as a whole.

Sources and notes

- DCLG, *Housing live tables 100 and 615*

3.23. Four boroughs account for half of all London's second homes

Number of dwellings in London recorded as second homes for council tax purposes, 2013



- There are 48,163 homes in London recorded as second homes for council tax purposes, around 1.5% of the total housing stock. Just over half of these are in four boroughs: 7,823 in Kensington and Chelsea, 6,784 in Westminster, 4,703 in Tower Hamlets and 5,158 in Camden.
- Together, the remaining 29 boroughs have 23,695 recorded second homes, with both Harrow and Croydon in single figures..

Sources and notes

- DCLG, Council Taxbase 2013

4 Housing costs and affordability

Although most private tenants in London expect to buy a home eventually, only 4% expect to do so within the next year (4.1). The burden of housing costs is highest for renting households, though it is ameliorated by benefits (4.2). There are now more people in poverty living in London's private rented sector than in social housing, though the poverty rate is still higher in social housing (4.3).

London's average house price was £450,000 in December 2013, 73% higher than the national average and up 12% in the last year (4.4). Larger homes command a very high premium in London, with a typical four-bedroom home costing 63% more than one with three bedrooms (4.5). Average house prices are highest in West Inner London (4.6), and this area also saw the greatest increase in prices over the last decade (4.7). Disparities in house prices within London have also widened at borough level over the last decade, with prices rising fastest in the most expensive boroughs (4.8).

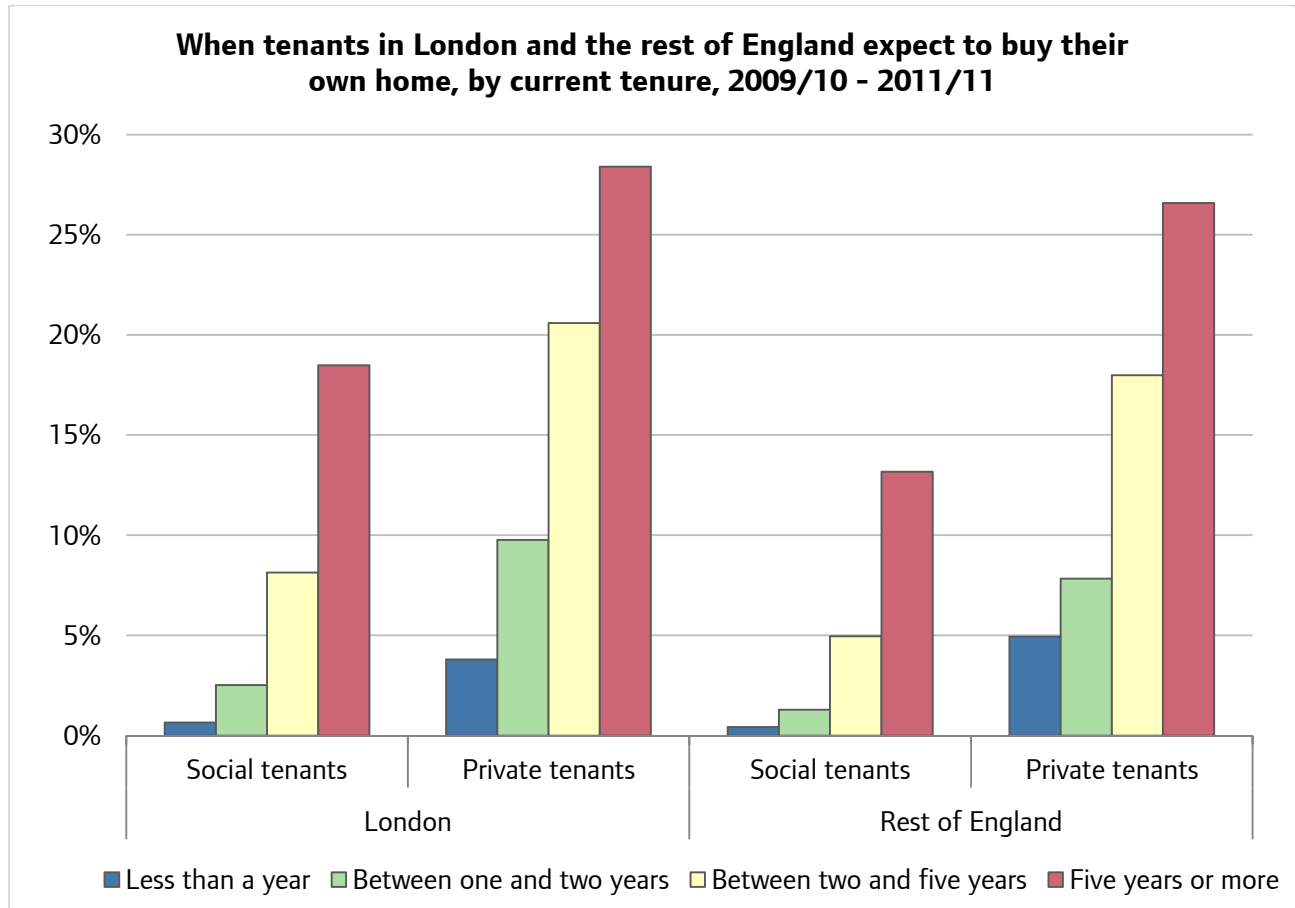
Non-UK residents bought between 10% and 15% of new build homes in London in the two years to June 2013 (4.9). Average house prices in London are at a record high relative to the average UK price (4.10). Prices for new build homes in London tend to be clustered around the average, with more second hand homes being sold for very low or very high prices (4.11). Indicators of housing market pressure have climbed to very high levels in London in recent months (4.12).

The affordability of owner occupation is at its worst ever level in London, while in the UK as a whole houses are still a little more affordable than they were before the recession (4.13). The typical first time buyer in London is now borrowing nearly four times their income (4.14), and high loan to income ratios have become particularly common in the capital (4.15). In 2013 there were 45,800 new loans to first time buyers in London, up 24% from 2012, and 37,400 to home movers, up 1% (4.16). While the typical first time buyer in London has to put down a deposit of 25%, mortgage payments are relatively low for those who are able to buy (4.17). Mortgage repossessions have fallen in London due to low interest rates, but there has been rapid growth in the number of landlord repossessions (4.18). Rates of repossession are highest in relatively deprived boroughs (4.19).

Average private rents rose quicker in London than in the rest of the country both before and after the housing market downturn (4.20), and London has by far the highest average private sector rents in the country (4.21). There is also huge variation in monthly market rents within London and, in the most expensive boroughs, between the top and bottom of the market (4.22).

The number of Housing Benefit recipients in London's private rented sector grew rapidly in 2009 and 2010, but fell slightly over the last year (4.23). Meanwhile, the number of Housing Benefit cases in the deregulated private rented sector dropped sharply in the most costly areas and rose in parts of Outer London (4.24). Average rents for new social rented tenancies rose 6.2% in the last year to £105 a week, while the average weekly rent for an Affordable Rent tenancy is £160 (4.25).

4.1. Although most private tenants in London expect to buy a home eventually, only 4% expect to do so in the next year

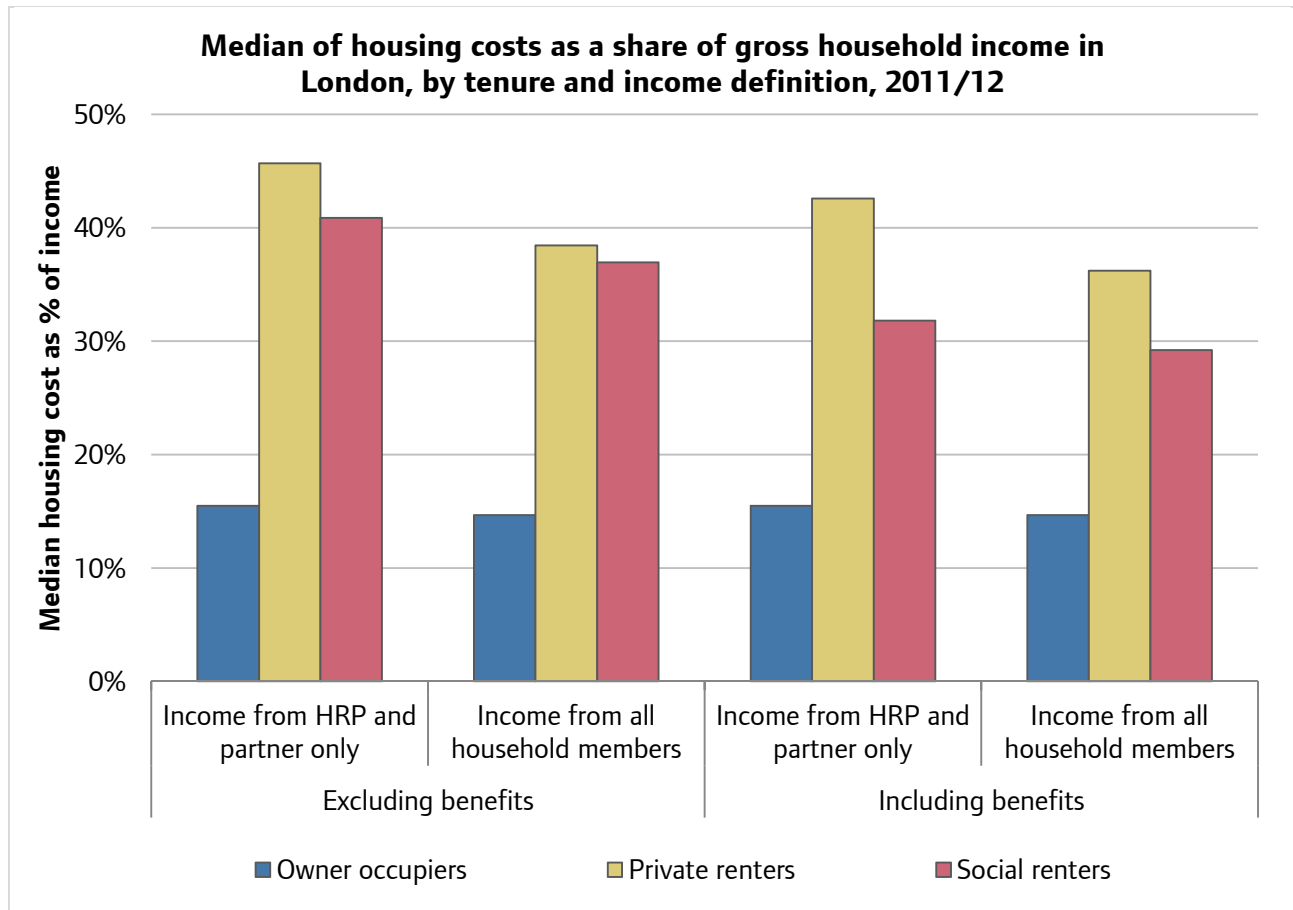


- Despite higher prices, renters in London are more likely to expect to buy in the coming years than those in the rest of England.
- 63% of private tenants in London expect to buy at some point (though not necessarily in London), compared to 57% in the rest of the country - but only 14% expect to buy within the next two years, with 28% expecting to wait at least five years.
- 30% of social tenants in London say they expect to buy, compared to 20% in the rest of the country, but most think it will be at least five years before they do..

Sources and notes

- English Housing Survey data, 2009/10 to 2011/12

4.2. The burden of housing costs is highest for renting households, though it is ameliorated by benefits

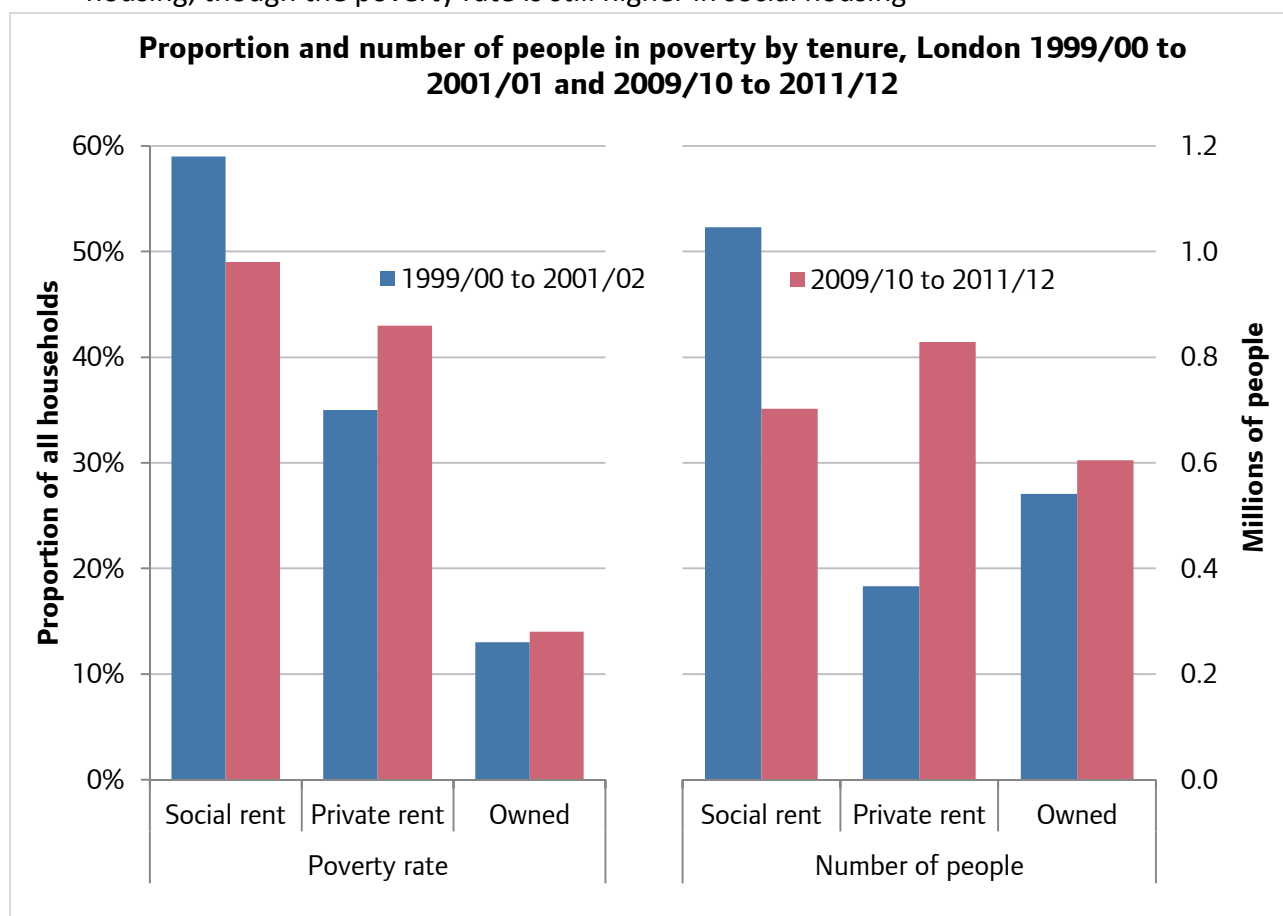


- The measurement of housing affordability, defined as housing costs as a proportion of income, depends heavily on the definition of income used and whether benefits are included or excluded.
- Looking only at the income of the household reference person and their partner and excluding benefits, the typical private renter in London spends 46% of their income on housing costs, compared to 41% for social tenants and 16% for owner occupiers with mortgages.
- But many private renting households include more than two earners, and taking the income of all household members into accounts brings the figure for private renters down to 38%, while taking benefits into account lowers it again to 36%.

Sources and notes

- English Housing Survey data, 2011/12

- 4.3. There are now more people in poverty living in London's private rented sector than in social housing, though the poverty rate is still higher in social housing

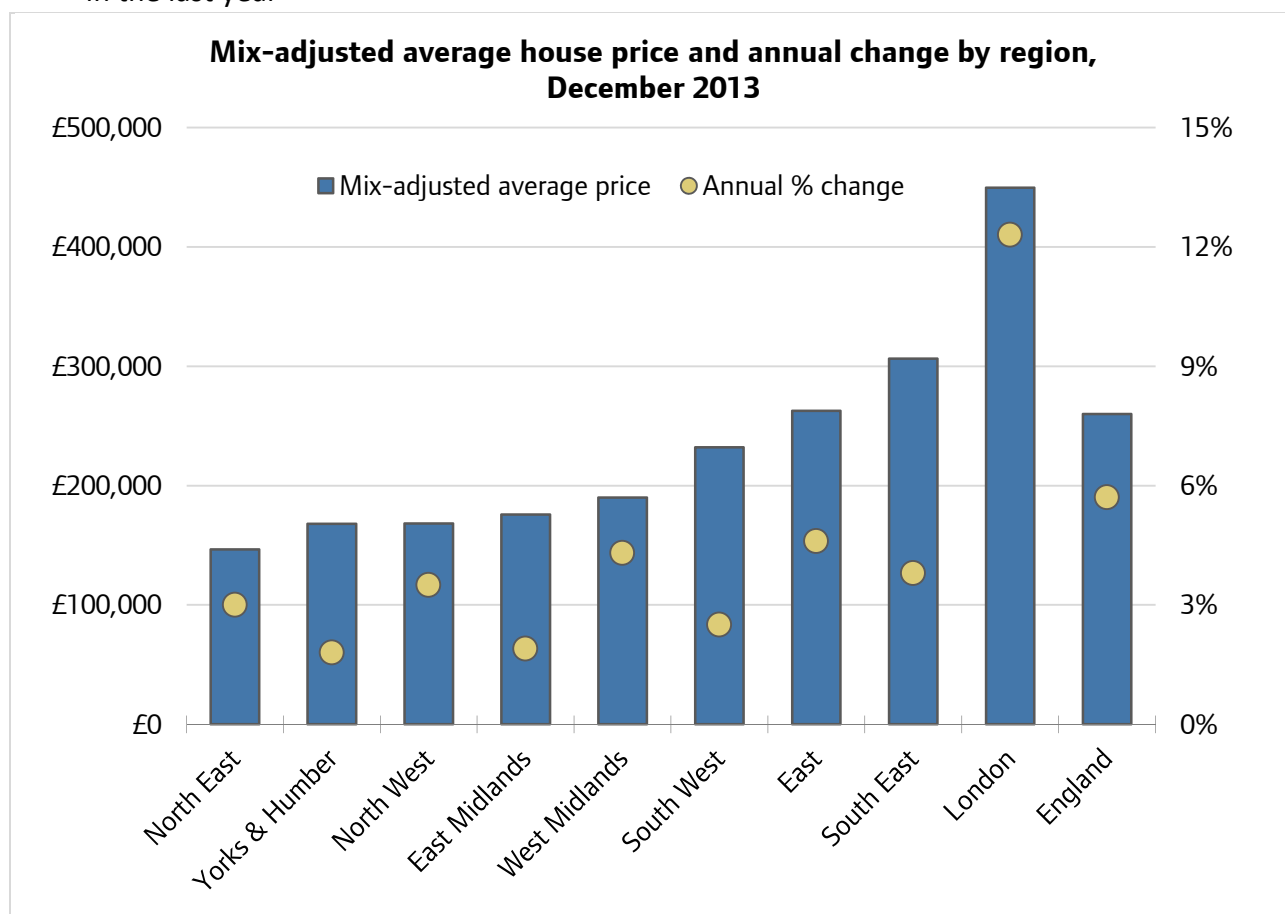


- There are an estimated 2.1 million Londoners living in poverty (after their housing costs are taken into account), around 28% of the total population. This is the same proportion in poverty as there was a decade ago, but the intervening ten years have seen a considerable shift in the tenure split of that total.
- A decade ago just over half of all Londoners in poverty lived in social housing, which had a 59% poverty rate, compared to 35% for private rented housing and 13% for owner occupation.
- But over the next ten years the poverty rate in social housing fell to 49% while in private rented housing it rose to 43% (and stayed roughly level in owner occupation).
- There are now an estimated 830,000 people living in poverty in private rented housing, compared to 700,000 in social housing and 605,000 in owner occupied housing.

Sources and notes

- Trust for London and New Policy Institute, *London's Poverty Profile* (original data from DWP, Household Below Average Income)
- The number of people in each tenure according to this source is quite different from other sources. Applying the rates above to 2011 Census estimates of the population in each tenure would result in a slightly higher number of people in poverty in social housing than in private rented housing.

4.4. London's average house price is £450,000, 73% higher than the national average and up 12% in the last year

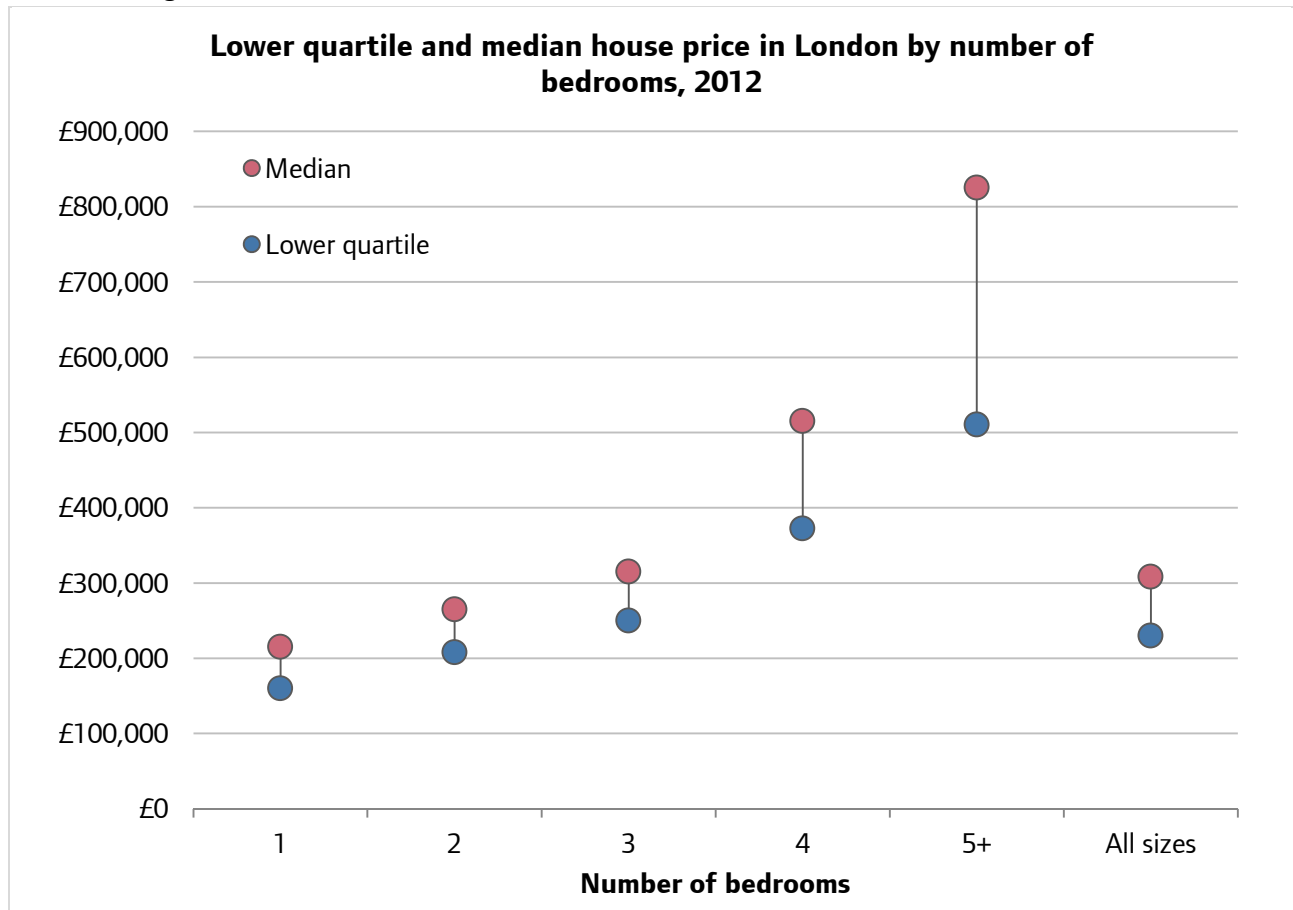


- The average (mean) house price in London, adjusted for the mix of homes sold to ensure comparability with other regions, was £450,000 in December 2013, up 12% in the last year.
- This is by far both the highest regional price in the country (73% above the England average) and the highest rate of annual growth (at least twice the growth rate of any other region).
- Most other regions have seen very low growth over the last few years, but in recent months prices have seen substantial increases in the West Midlands and the wider South.

Sources and notes

- ONS House Price Index

4.5. Larger homes command a very high premium in London, with a typical four-bedroom home costing 63% more than one with three bedrooms

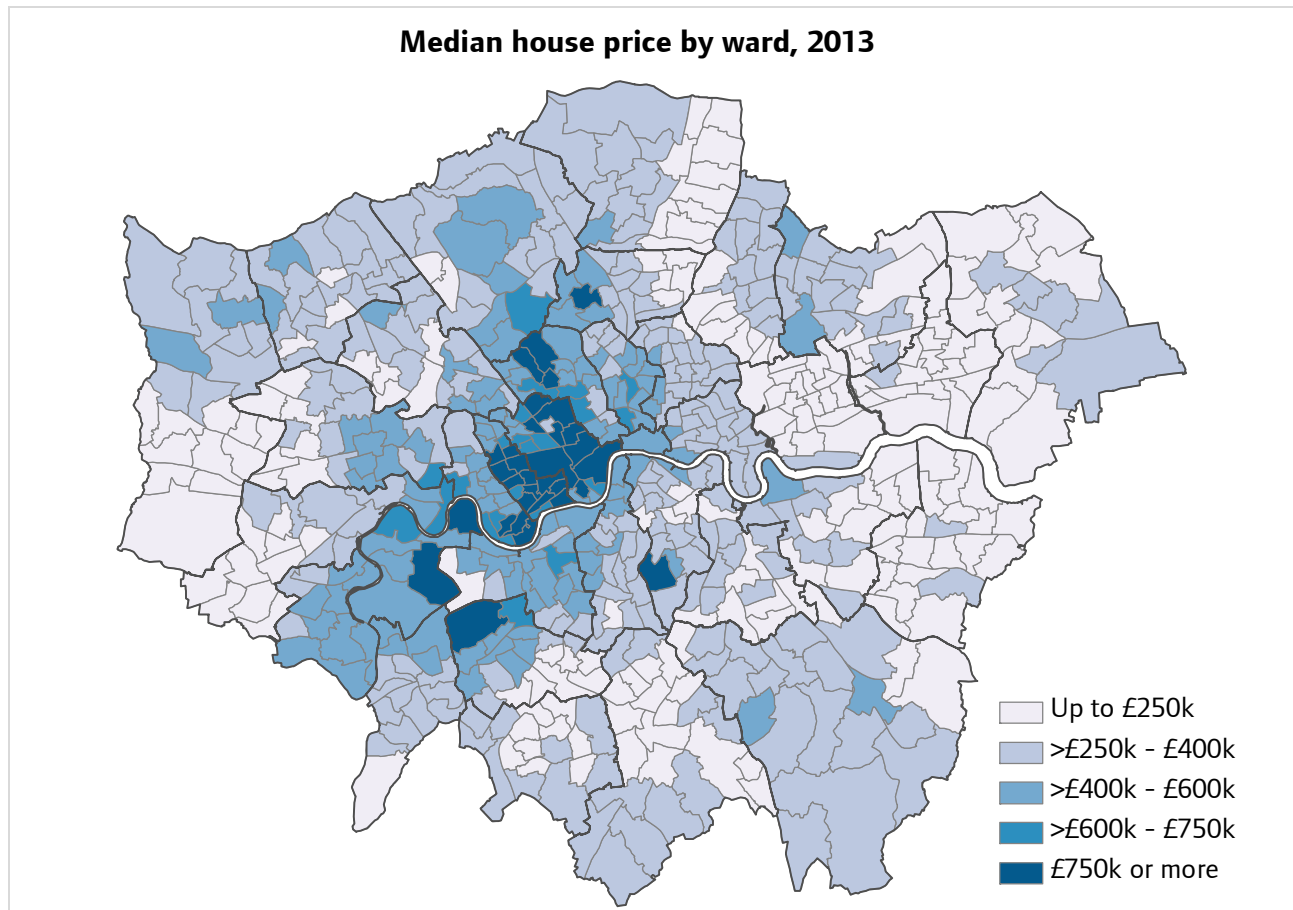


- In 2012 the median price for a home in London, unadjusted for the mix of homes sold, was £308,000, and the lower quartile price £230,000. Unsurprisingly, homes with more bedrooms commanded higher prices, with the median price for a home with five or more bedrooms at £825,000 and even the lower quartile price at just over half a million pounds.
- The price premia for larger homes are strikingly high: for example, the median price for a four bedroom home (£515,000) is 63% higher than for a three bedroom home (£315,000).
- The spread between lower quartile and median prices is also wider for larger homes, perhaps because smaller homes are more likely to be new and thus relatively homogenous.

Sources and notes

- ONS data provided to GLA

4.6. Average house prices are highest in West Inner London

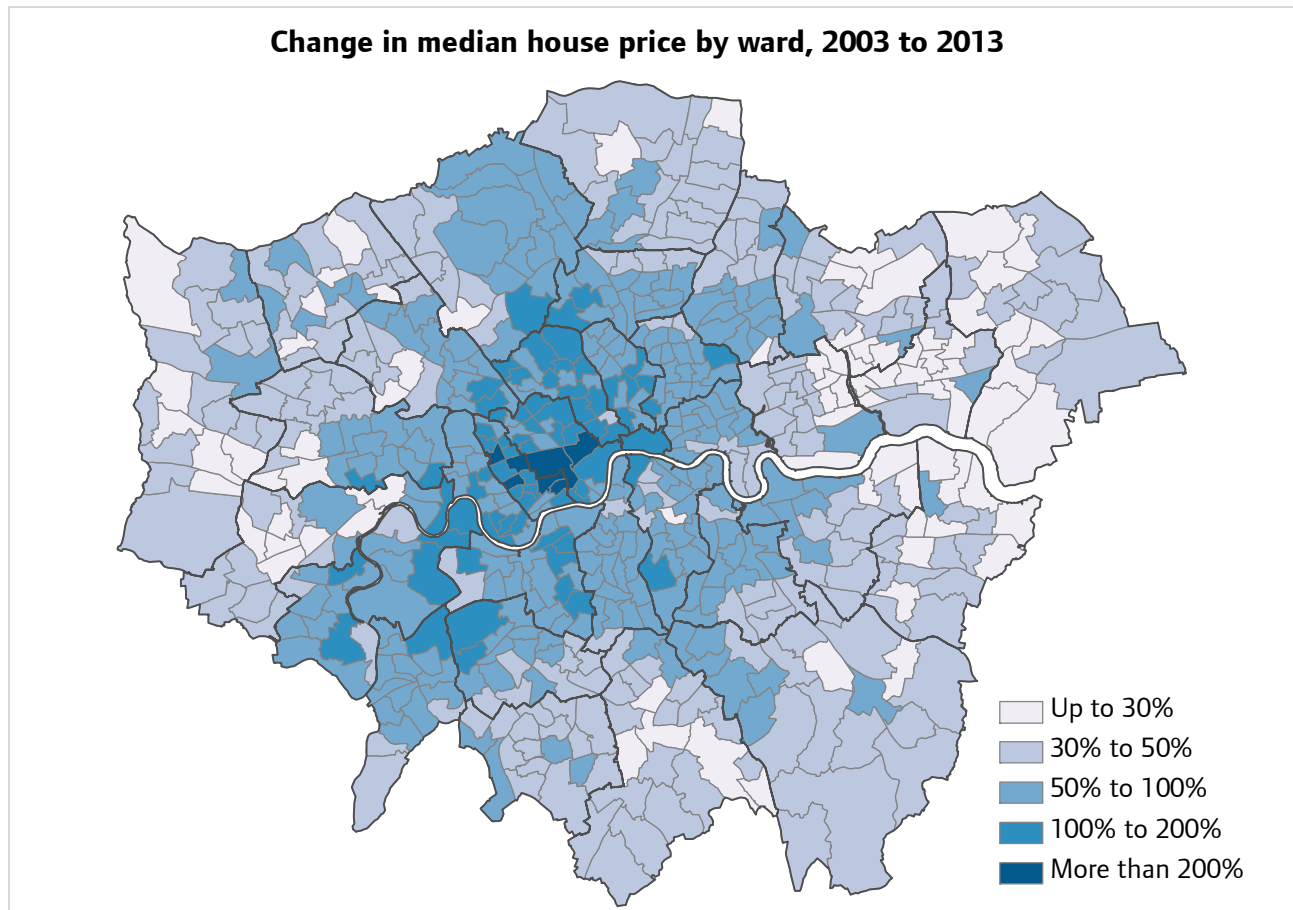


- In 2013, the median price for a home sold in London (unadjusted for the mix of homes sold) was £321,000, but at ward level this varied from £149,000 in the Belvedere ward of Bexley to £3.45 million in the Knightsbridge and Belgravia ward of Westminster.
- There are 14 wards in London with a median house price of more than £1 million, most of which are in Westminster or Kensington and Chelsea.
- At the other end of the price scale there are 11 wards with median prices below £175,000, distributed around Bexley, Greenwich and Barking Dagenham.

Sources and notes

- Land Registry price paid data. Data produced by Land Registry © Crown copyright 2013

4.7. Over the last decade, the highest increases in average prices at ward level were in West Inner London

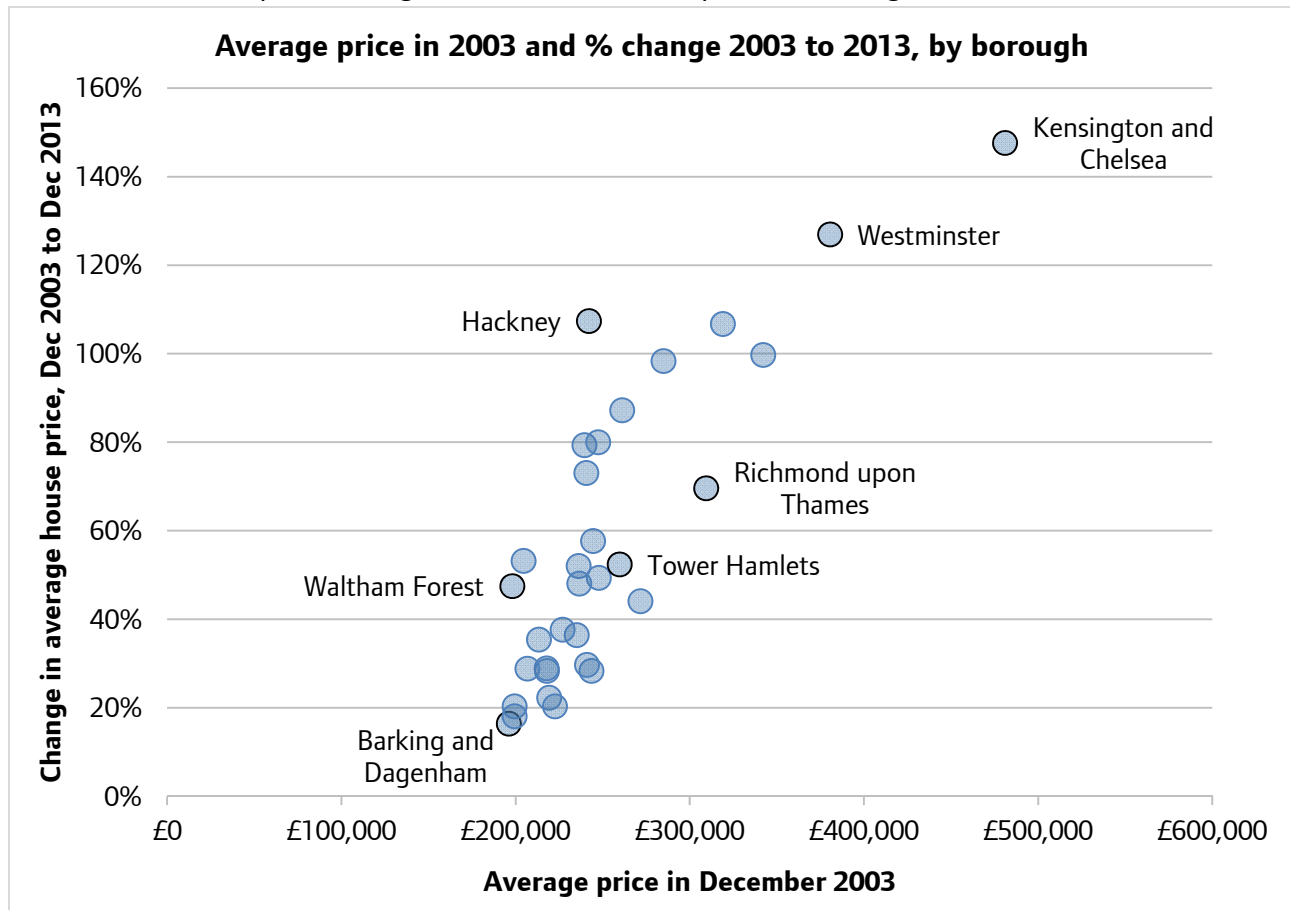


- Across London as a whole the median house price (not adjusted for inflation or for the mix of homes sold) rose 61% from £200,000 in 2003 to £321,000 in 2013. Over this period every ward in London saw an increase in median prices.
- The lowest price increases were generally seen in Outer London, particularly in the east, with Thamesmead Moorings in Greenwich seeing the lowest rise of 4% over the decade.
- The highest price increases were concentrated in West Inner London (where prices were already highest), with median prices in Knightsbridge and Belgravia (Westminster) rising 369% and Hans Town (Kensington and Chelsea) 368%.

Sources and notes

- Land Registry price paid data. Data produced by Land Registry © Crown copyright 2013

- 4.8. Disparities in house prices within London have also widened at borough level over the last decade, with prices rising fastest in the most expensive boroughs

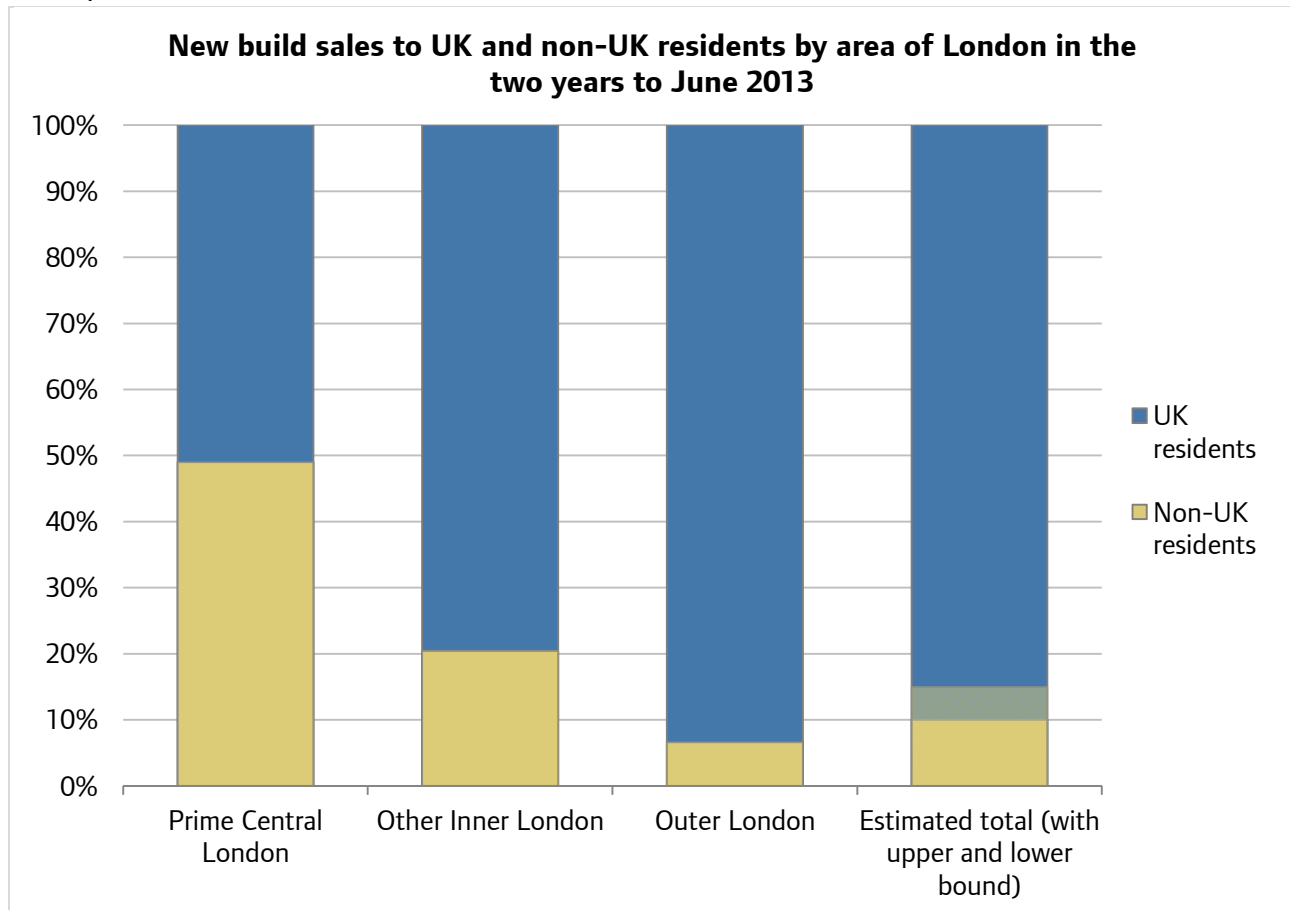


- In December 2003 the average house price (adjusted for the mix of homes sold but not for inflation) Kensington and Chelsea was £481,000, 2.5 times the average price in Barking and Dagenham.
- Over the next ten years, prices rose in every borough (and by 57% in London as a whole), but they rose fastest in the priciest and slowest in the cheapest boroughs. Specifically, Kensington and Chelsea saw 148% growth in average prices, compared to just 16% in Barking and Dagenham.
- By December 2013, the average price in Kensington and Chelsea was £1.19 million, 5.2 times the average Barking and Dagenham price of £228,000.

Sources and notes

- Land Registry House Price Index background tables
- 'Average price' refers to the seasonally adjusted and smoothed price. Data produced by Land Registry © Crown copyright 2013

4.9. Non-UK residents bought between 10% and 15% of new build homes in London in the two years to June 2013

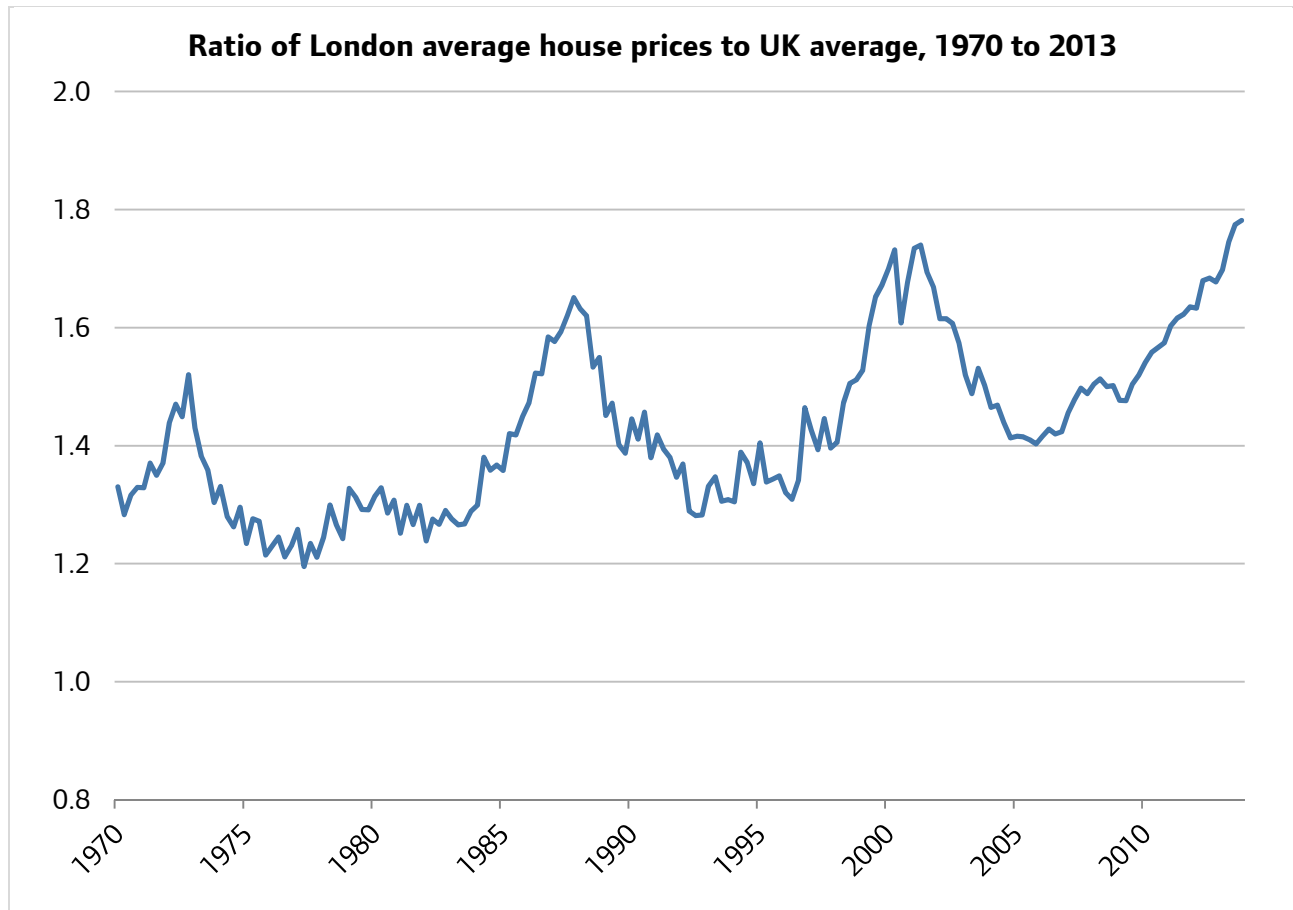


- Based on an analysis of Land Registry records, Knight Frank estimate that between 10% and 15% of all sales of new build homes in London in the two years to June 2013 were to non-UK residents.
- Non-UK residents accounted for 49% of buyers in the 'prime' central London area, but only 20% in the rest of Inner London and just 7% in Outer London.
- The share of overseas buyers is lower when considering second-hand sales. Knight Frank estimate that non-UK residents bought 28% of all homes (including second-hand) in prime central London in the last year, and the Bank of England estimate they account for around 3% of all sales across London.
- These estimates are based on residence: estimates based on the nationality of buyers would show a higher proportion of 'foreign' buyers given how many non-UK nationals are resident in London.

Sources and notes

- Knight Frank, *International buyers in London, October 2013*
- These figures cover new build sales only. Knight Frank report that overseas buyers purchase a smaller share of second-hand homes, and the Bank of England estimate that overseas buyers account for only 3% of all sales in London taking both new build and second-hand sales into account.

4.10. Average house prices in London are at a record high relative to the average UK price



- The ratio of mix-adjusted average house prices in London to prices in the UK as a whole has recently reached its highest recorded value, with London prices 78% higher than the UK average.
- While the trend again exhibits strong cycles (possibly evidence of a 'ripple effect' in prices between London and the rest of the country), it is notable that the bottom of each previous cycle has left average London prices further above the UK average than the one before it, further evidence of a long-term failure of supply to meet demand in the capital.

Sources and notes

- ONS House Price Index, quarterly values

4.11. Prices for new build homes in London tend to be clustered around the average, with more second hand homes being sold for very low or very high prices

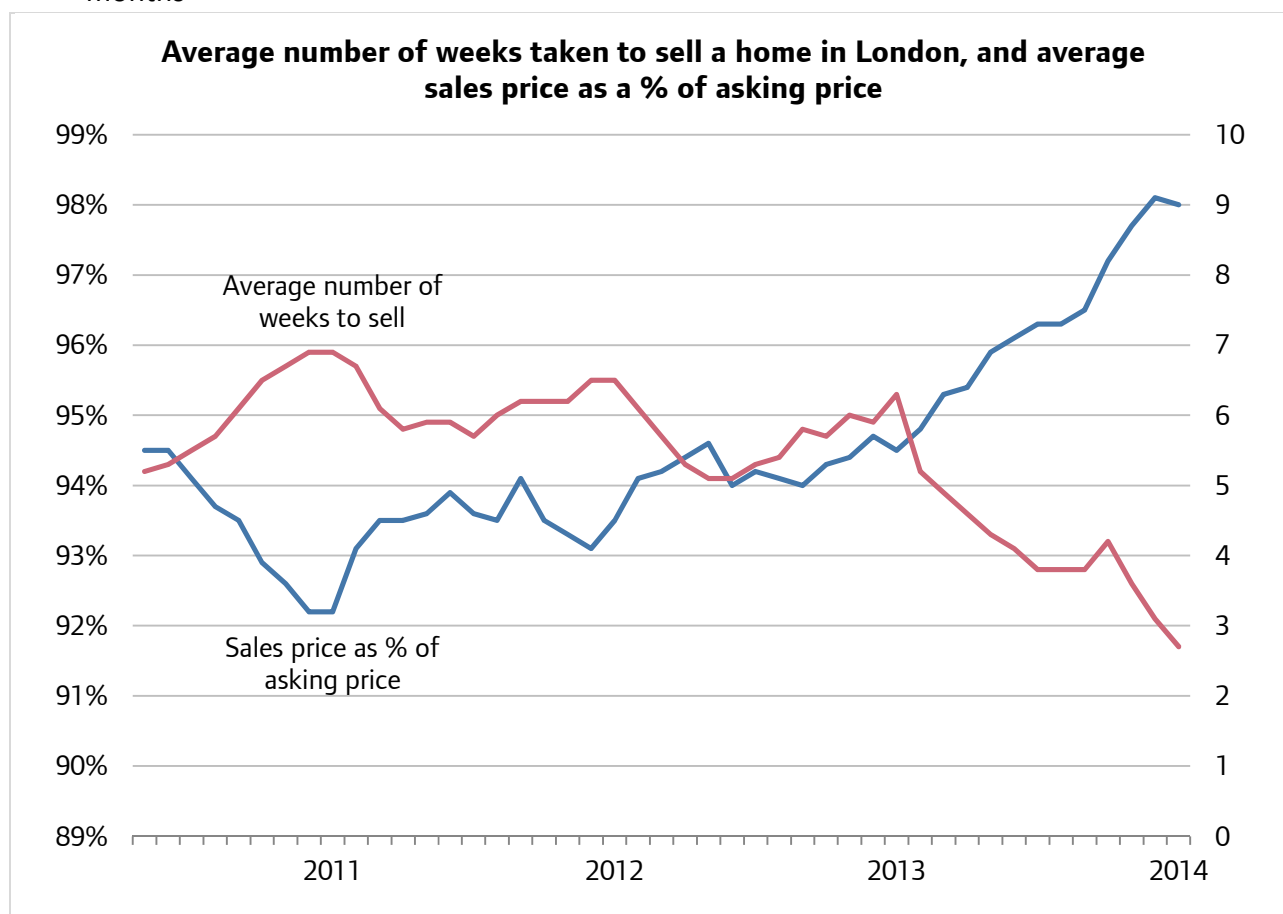


- There were just under 100,000 homes sold in London in 2013, of which 8% were recorded by the Land Registry as new homes and 92% second hand. The median price for all sales was £321,000, but for new build homes was slightly lower at £309,000.
- In general the distribution of prices was quite similar in each category, but the prices of new build homes are slightly more clustered around the average, with fewer at either very low or very high prices. 7% of second hand homes sold for more than £1 million in 2013, compared to 4% of new homes.
- The repeated pattern of peaks and troughs reflects buyers paying prices just under Stamp Duty thresholds (at £250,000, £375,000 and £500,000) in order to avoid paying higher rates of duty.

Sources and notes

- Land Registry price paid data

4.12. Indicators of housing market pressure have climbed to very high levels in London in recent months

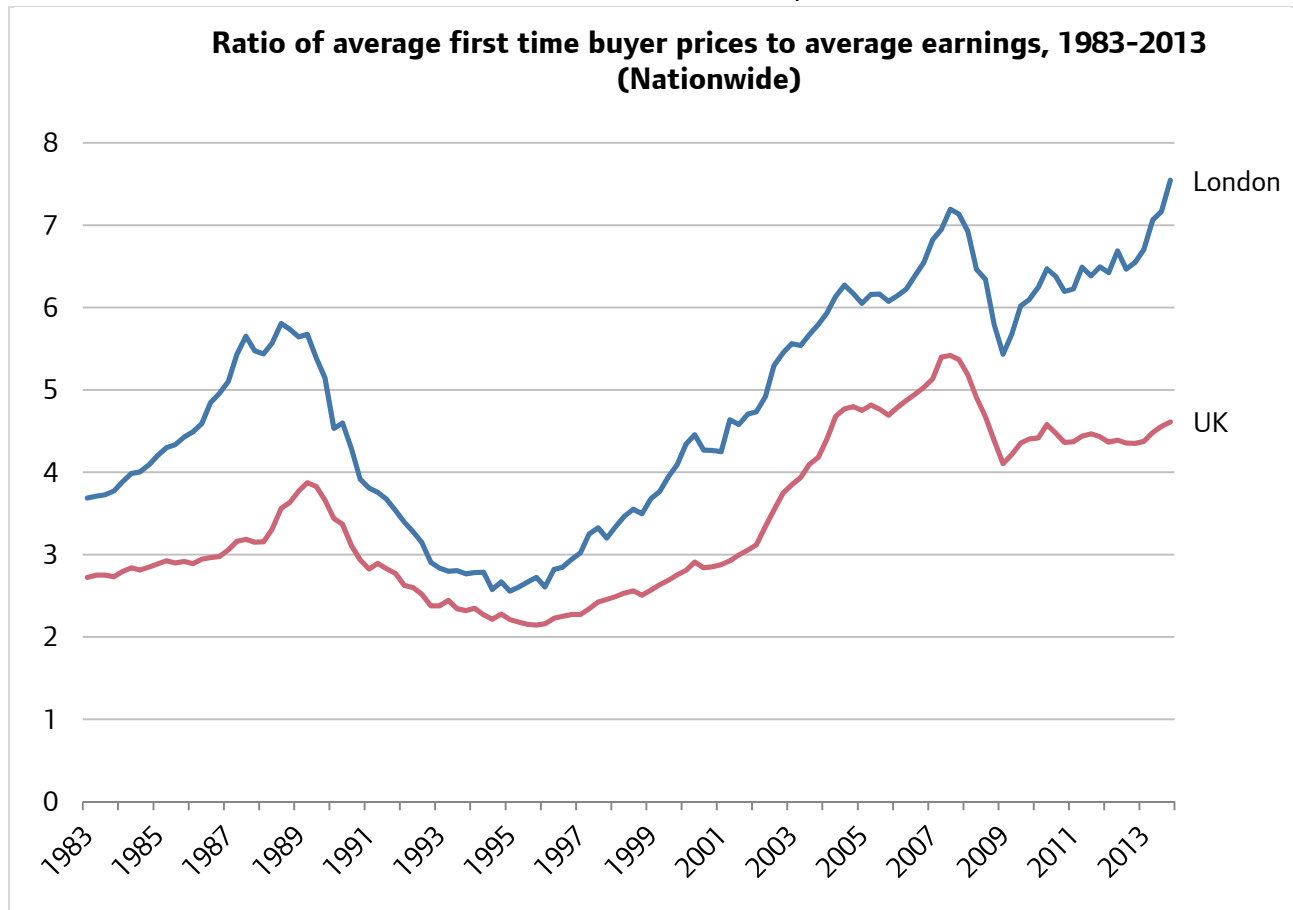


- This chart shows trends in two indicators of housing market pressure reported by Hometrack: the average time (in weeks) it takes to sell a home in London, and the average sales price as a percentage of the asking price. A shorter time to sell and a smaller average discount from the asking price indicate a more pressured market, with a greater shortfall of supply relative to demand.
- In London sales prices were around 94% of asking prices throughout 2012 but this figure climbed rapidly throughout 2013 and reached 98% in January 2014. At the same time, the average time taken to sell dropped sharply, reaching 2.7 weeks in January. These figures compare to 95.3% and 8.0 weeks respectively in England and Wales as a whole.

Sources and notes

- Hometrack monthly national house price survey

4.13. The affordability of owner occupation is at its worst ever level in London, while in the UK as a whole houses are still a little more affordable than they were before the recession

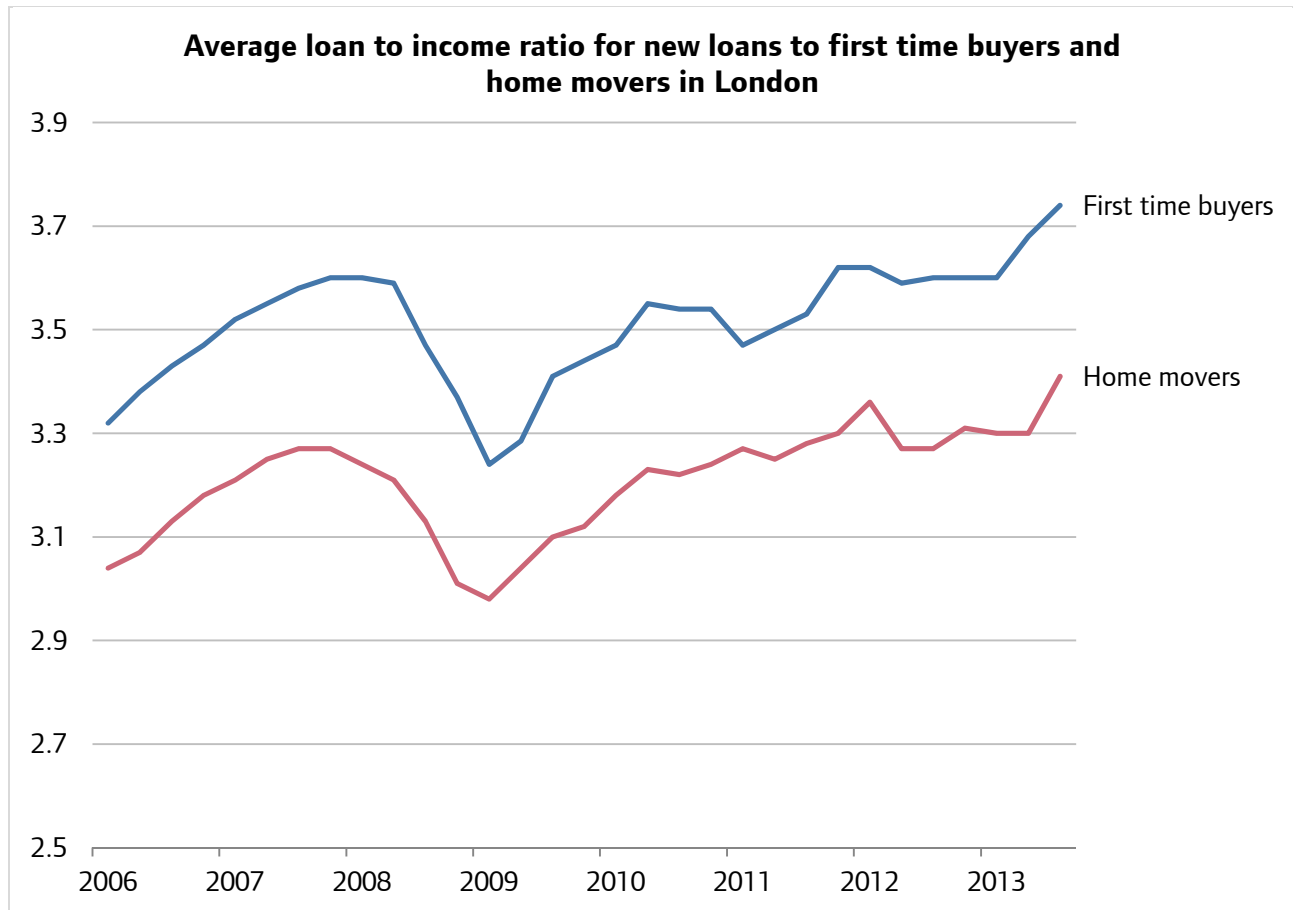


- The ratio of the average price of homes sold by the Nationwide to first time buyers to average earnings is at its highest ever value of 7.5 in London, up from 2.7 in the mid-1990s and 5.4 in 2009.
- In contrast, affordability in the UK as a whole is relatively flat according to this measure, and remains better than at the peak of the last market boom – but still worse than at any time before 2004.

Sources and notes

- Nationwide House Price Index

4.14. The typical first time buyer in London is now borrowing nearly four times their income

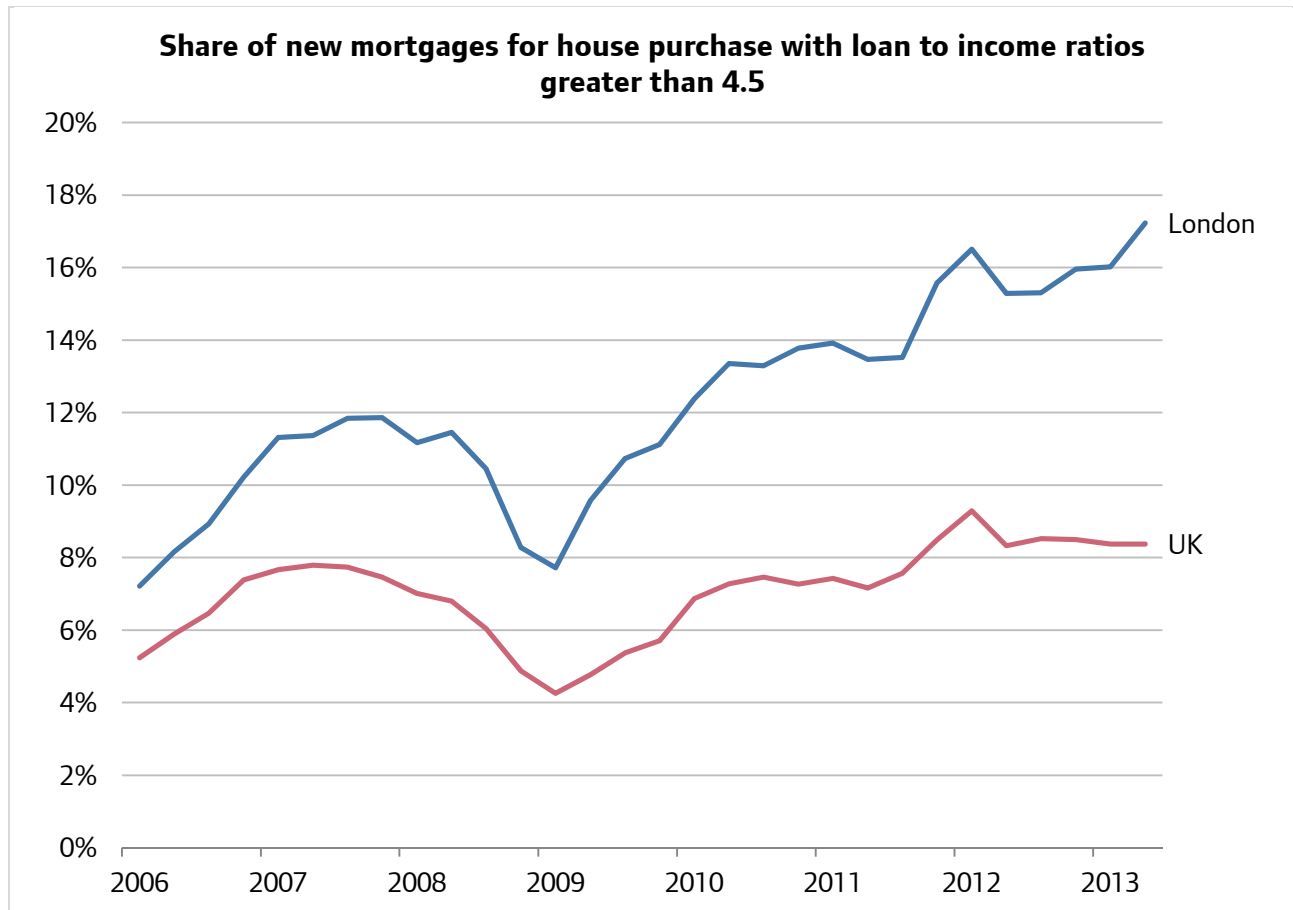


- The typical first time buyer in London borrowed 3.74 times their income in Q3 2013, up from a loan to income ratio of 3.53 two years ago and just 3.24 at the bottom of the recession in Q1 2009.
- Home movers, who usually bring some equity from the sale of their previous home, have a lower loan to income ratio of 3.41, though this too has risen in the last few years.
- London's typical loan to income ratios are also higher than the national average. Across England as a whole, the typical first time buyer borrowed 3.42 times their income in Q3 2013, and the typical home mover 2.95 times.

Sources and notes

- CML Mortgage lending statistics

4.15. High loan to income ratios have become particularly common in London

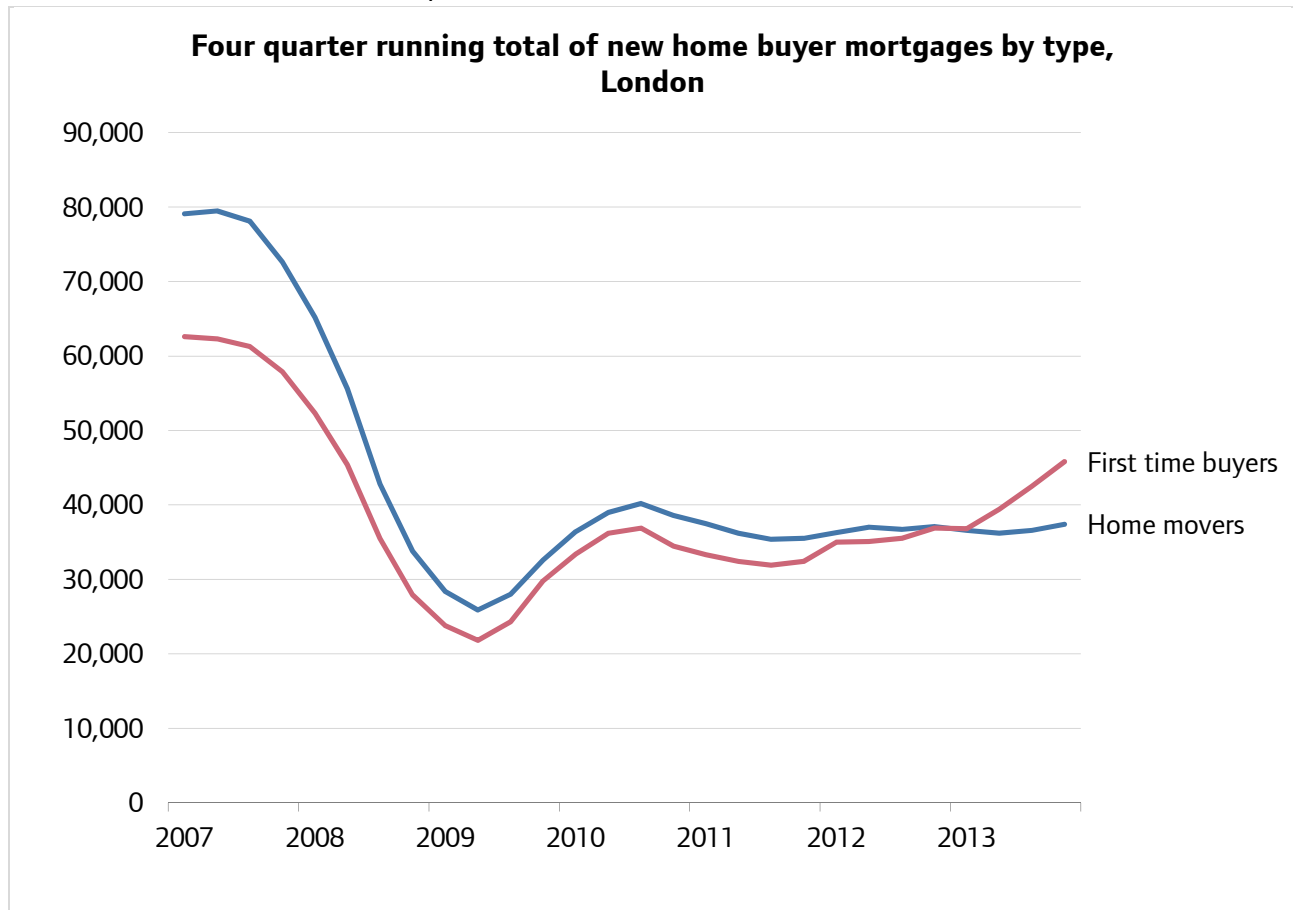


- The share of new mortgages for house purchase in London with very high loan to income ratios (greater than 4.5) reached a new high of 17% in June 2013, up from 8% in March 2009.
- High loan to income ratio mortgages are a much lower share of the market in the country as a whole, at just 8% in June 2013.
- Households taking out loans with such high ratios could be risking affordability problems when interest rates eventually rise.

Sources and notes

- Bank of England Financial Stability Report, November 2013

4.16. In 2013 there were 45,800 new loans to first time buyers in London, up 24% from 2012, and 37,400 to home movers, up 1%

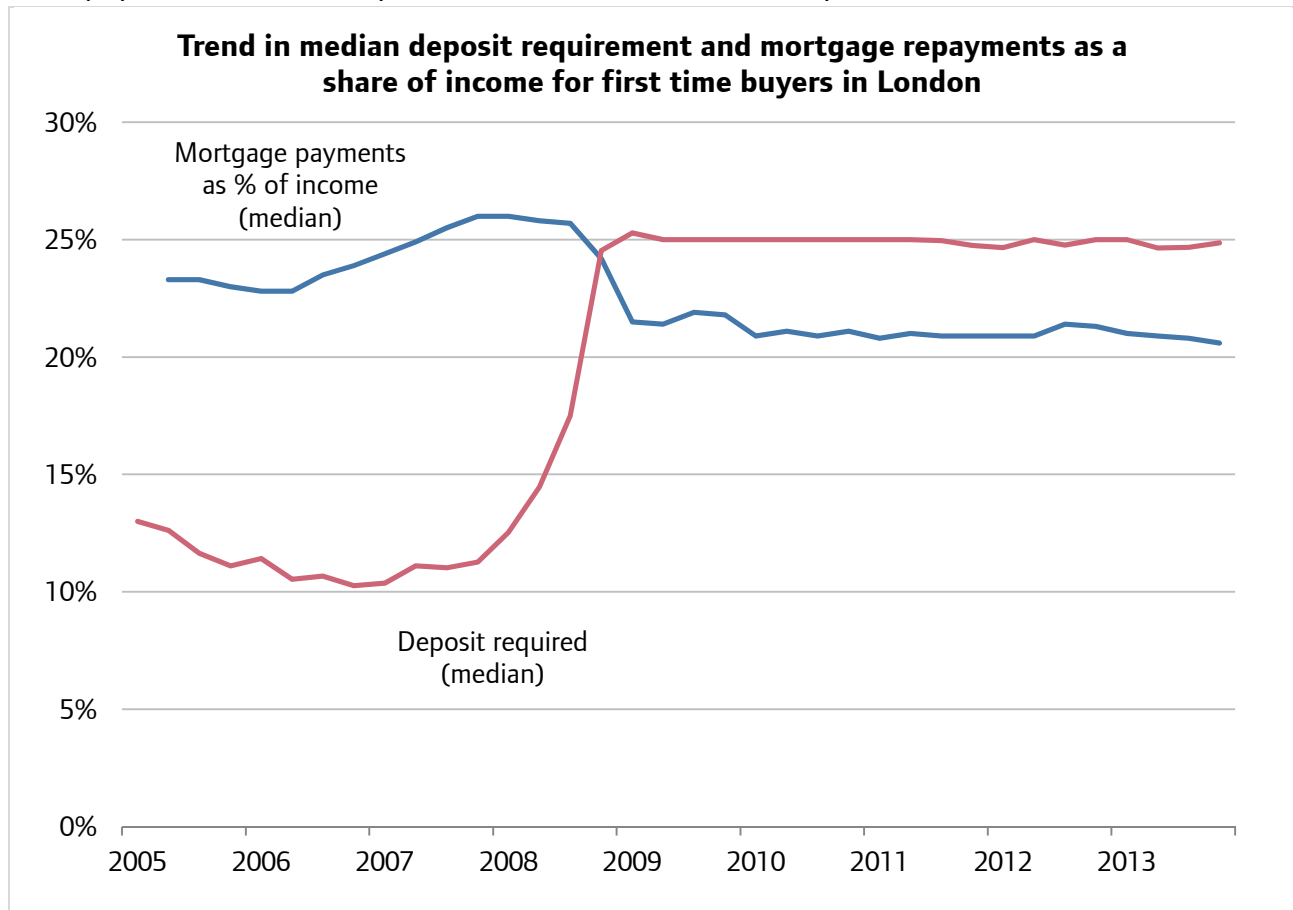


- In 2013 there were 45,800 new first time buyer mortgage loans in London, an increase of 24% from 2012, while the number of loans to home owners moving house has remained relatively static at 37,400.
- At this rate of growth, it would take around 18 months for the number of loans to first time buyers to return to pre-recession levels of just over 60,000 a year.
- While there were a total of 83,200 new mortgage loans made to homeowners (new and existing) in London in 2013, there were around 100,000 home sales in total. Assuming no major measurement discrepancies, the difference presumably comprises sales to cash buyers and investors.

Sources and notes

- CML Mortgage lending statistics

4.17. While the typical first time buyer in London has to put down a deposit of 25%, mortgage payments are relatively low for those who are able to buy

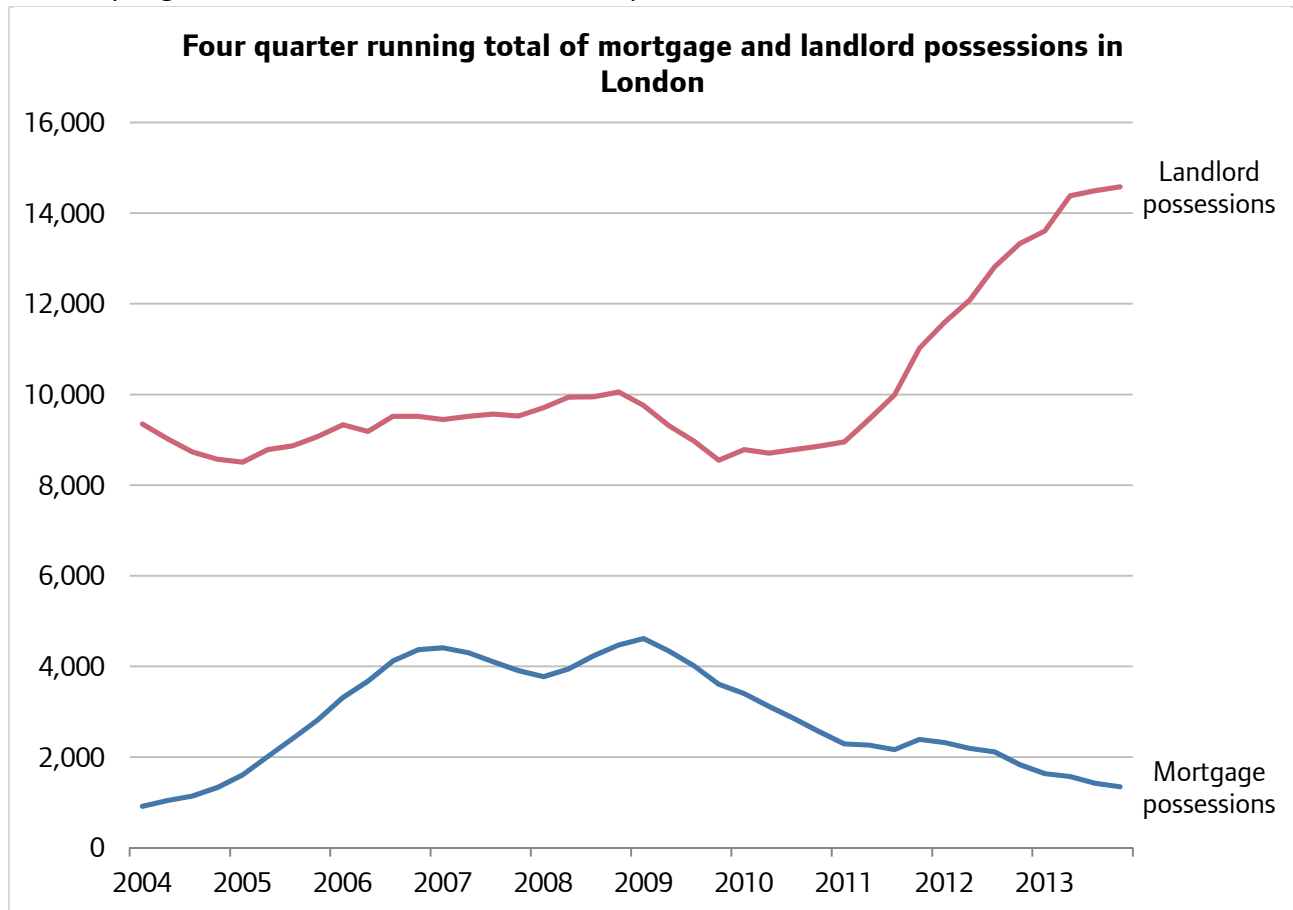


- The typical first time buyer in London puts down a deposit of 25%, a figure which shot upwards during 2008 and has remained fairly steady since 2009.
- At around the same time the burden of mortgage payments (as a share of income, and taking into account both capital and interest payments) fell, largely due to lower interest rates. Typical mortgage payments were 21% of first time buyer income in Q3 2013, down from a peak of 26% in early 2008.

Sources and notes

- CML Mortgage lending statistics

4.18. Mortgage repossessions have fallen in London due to low interest rates, but there has been rapid growth in the number of landlord repossessions

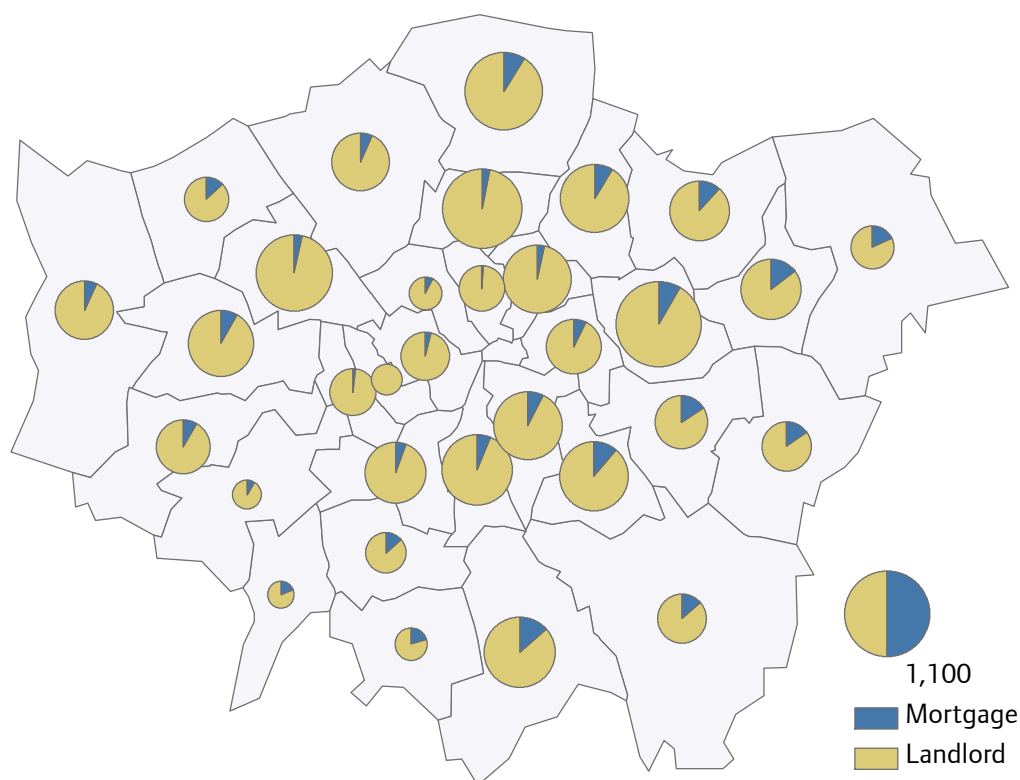


- In 2013 there were 15,930 home repossessions carried out by county court bailiffs in London, only 1,350 or 8% of which were repossessions of mortgaged homes, with the remainder being repossessions by social or private landlords.
- The number of mortgage repossessions peaked in the year to March 2009 at 4,610 and has since fallen by around 70%, helped by very low interest rates. But landlord repossessions have climbed rapidly over the same period, from a low of 8,550 in 2009 up to 14,280 in 2013.
- These figures exclude any repossessions carried out without the involvement of county court bailiffs, so the total number is higher than shown here.

Sources and notes

- Ministry of Justice statistics
- The equivalent chart in *Housing in London 2012* showed orders made for possession, of which some do not lead to eventual repossession

4.19. Rates of repossession are highest in relatively deprived boroughs

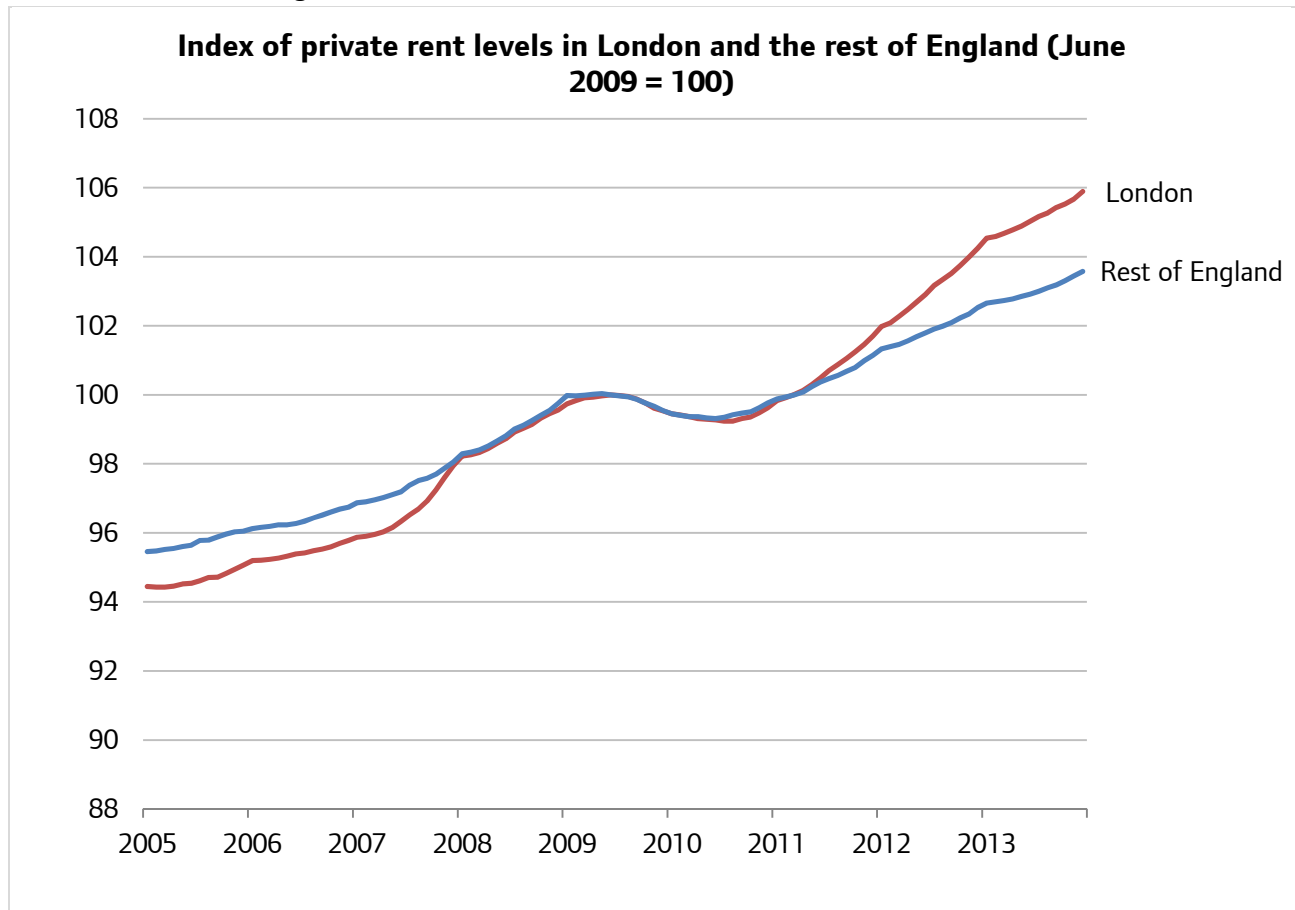
Home repossessions by county court bailiffs in 2013, by borough and type

- At borough level, the highest number of homes repossessed by county court bailiffs in 2013 was in Newham, where 1,090 homes were repossessed (comprising 90 mortgage repossessions and 1,000 landlord repossessions).
- Levels of repossession were generally highest in relatively deprived boroughs, with the next highest totals seen in Haringey (950), Enfield (910) and Brent (870).
- Croydon had the highest number of mortgage repossessions at 100.
- There were no repossessions recorded in the City of London in 2013, and the next lowest totals were in Kingston upon Thames (110) and Richmond upon Thames (120).

Sources and notes

- Ministry of Justice statistics

4.20. Average private rents rose quicker in London than in the rest of the country both before and after the housing market downturn

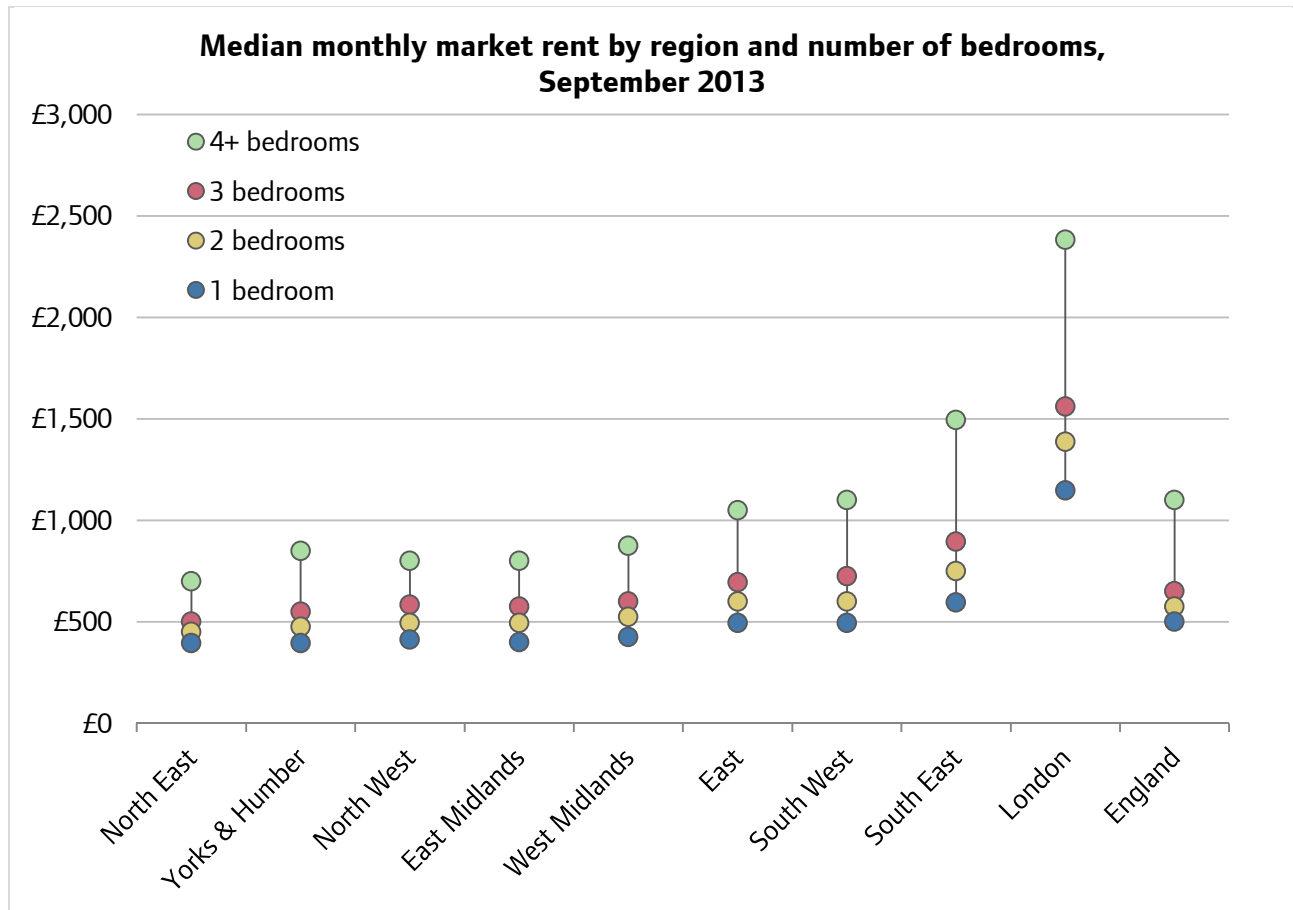


- Average private rents rose more quickly in London than in the rest of England both before and after the recent recession. In December 2013 average rents in London were 5.9% above their June 2009 level, compared to 3.6% in the rest of England.
- However, annual rental growth in London has fallen in recent months, from 2.5% a year at the start of 2013 to 1.6% in December. Over the last three years average rents in London have risen less than general inflation, but more than average earnings.
- The ONS index calculates changes in the rents for both new and ongoing tenancies, while most other indices cover new rents only. The fact that the ONS index shows slower growth indicates that many private landlords do not raise rents when renewing tenancies.

Sources and notes

- ONS, *Experimental Index of Private Housing Rental Prices*

4.21. London has by far the highest average private sector rents in the country

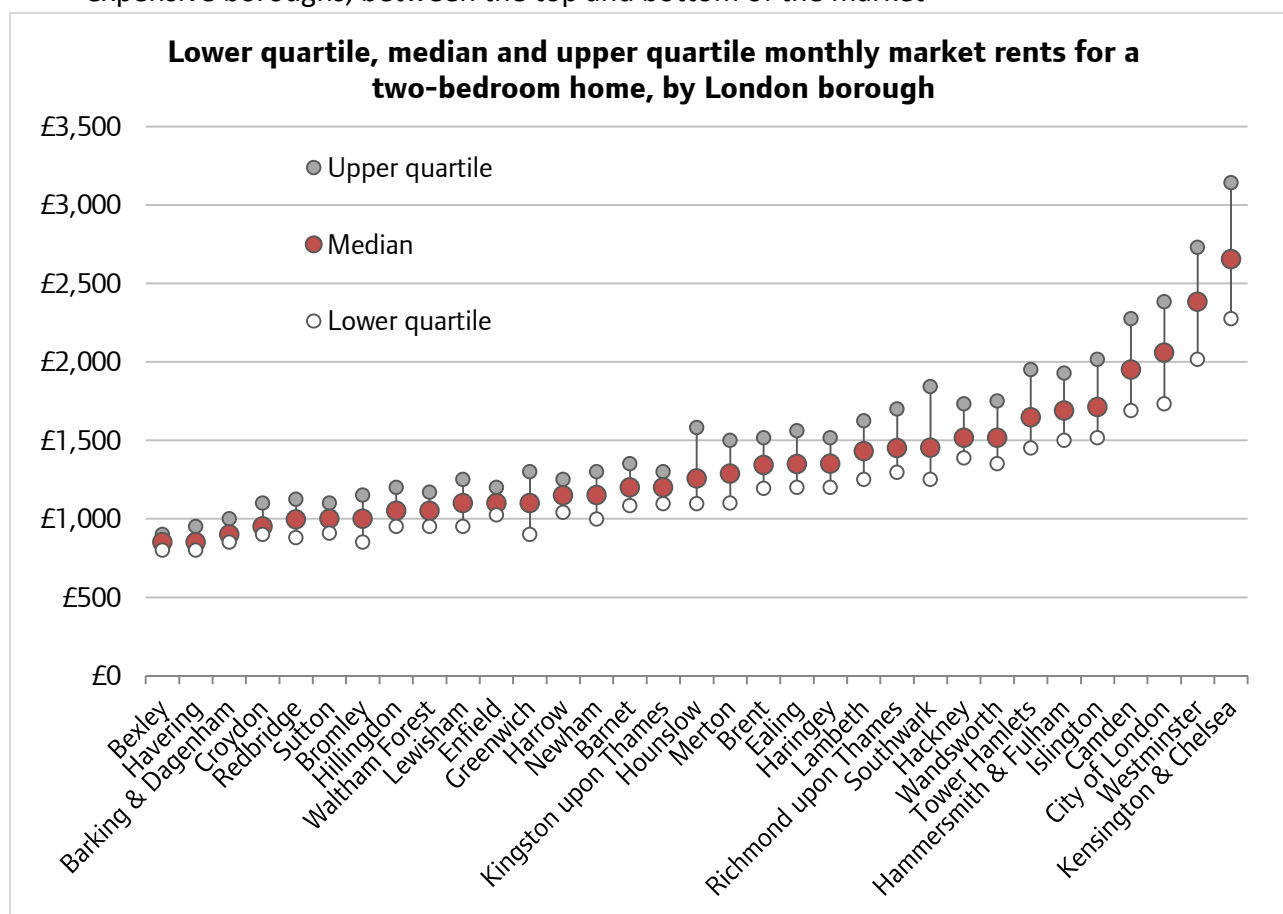


- The median rent for a privately rented home in London (excluding any cases where the tenant receives Housing Benefit) is £1,300, more than twice as high as the median in England as a whole.
- London's rents are so much higher than those of other regions that the median rent for a one-bedroom home in London is (slightly) higher than the national median rent for a home with four bedrooms or more.
- It should be noted that these statistics exclude any cases where the tenant receives Housing Benefit. As the average rent for Housing Benefit cases is below the overall average, excluding these cases inflates the average reported.

Sources and notes

- Valuation Office Agency, *Private Rental Market Statistics*

4.22. There is also huge variation in monthly market rents within London and, in the most expensive boroughs, between the top and bottom of the market

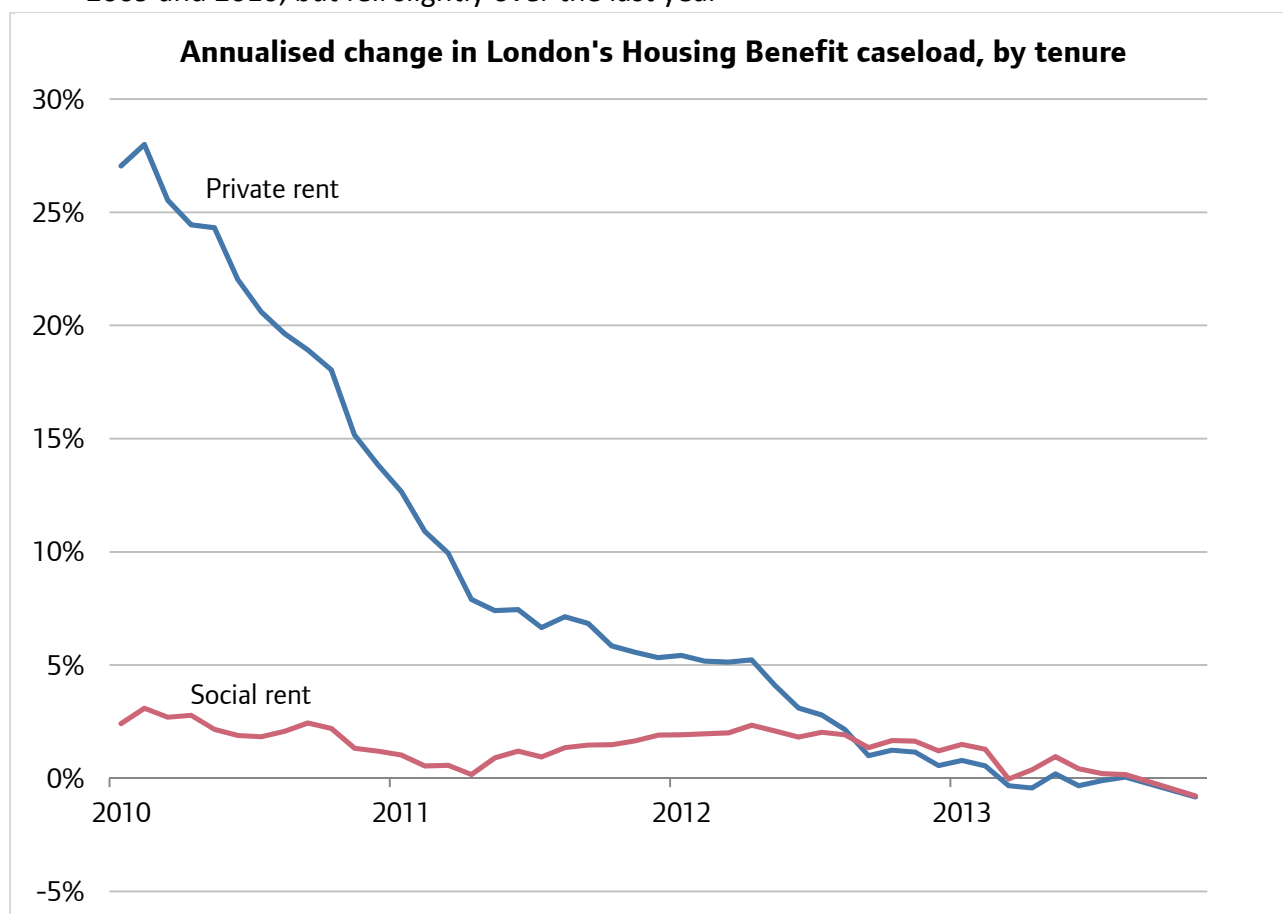


- While the median monthly market rent for a two bedroom home across London as a whole is £1,387, most London boroughs have a median below this level as higher rents tend to be found in Inner London boroughs with larger rented sectors.
- The lowest median monthly rent for a two bedroom home is £850 in Bexley and Havering, while the median rent in Kensington and Chelsea is nearly four times higher at £2,655.
- Across Inner London as a whole the median monthly rent for a two bedroom home is £1,625, compared to £1,100 in Outer London.

Sources and notes

- Valuation Office Agency, *Private Rental Market Statistics*
- As with the previous chart, these figures exclude any cases where the tenant receives Housing Benefit

4.23. The number of Housing Benefit recipients in London's private rented sector grew rapidly in 2009 and 2010, but fell slightly over the last year



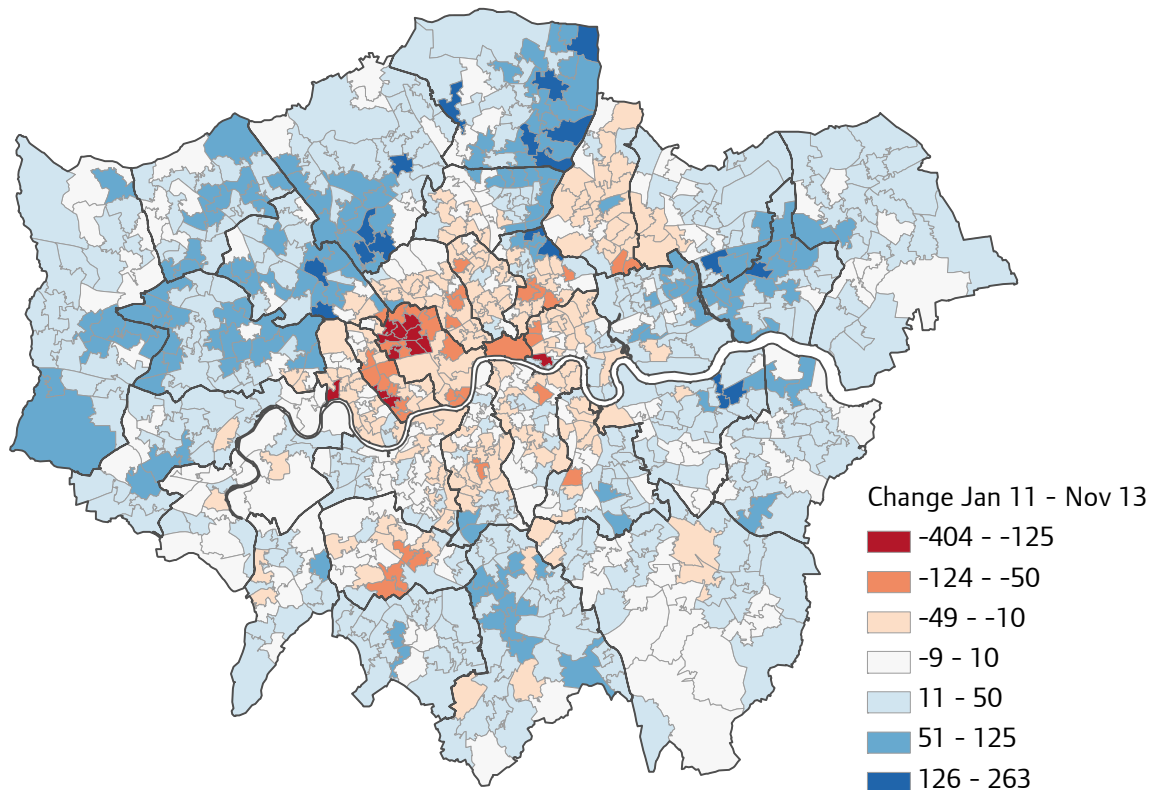
- The number of private tenants in London receiving Housing Benefit grew by 28% in 2009, but rose more slowly as the economy improved, with growth of only 14% in 2010, 5% in 2011 and 1% in 2012, before falling by 1% in the year to November 2013.
- Growth in the caseload of social renting Housing Benefit recipients was lower and relatively steady at 1% or 2% a year over this period, before also falling by 1% in the year to November 2013.
- By November 2013 there were 278,000 Housing Benefit recipients in London's private rented sector, and 564,000 in social housing.

Sources and notes

- DWP, Stat Xplore

4.24. Meanwhile, the number of Housing Benefit cases in the deregulated private rented sector dropped in the most costly areas and rose in parts of Outer London

Change in deregulated private rented sector Housing Benefit caseload by London Middle Super Output Area, Jan 2011 to Nov 2013

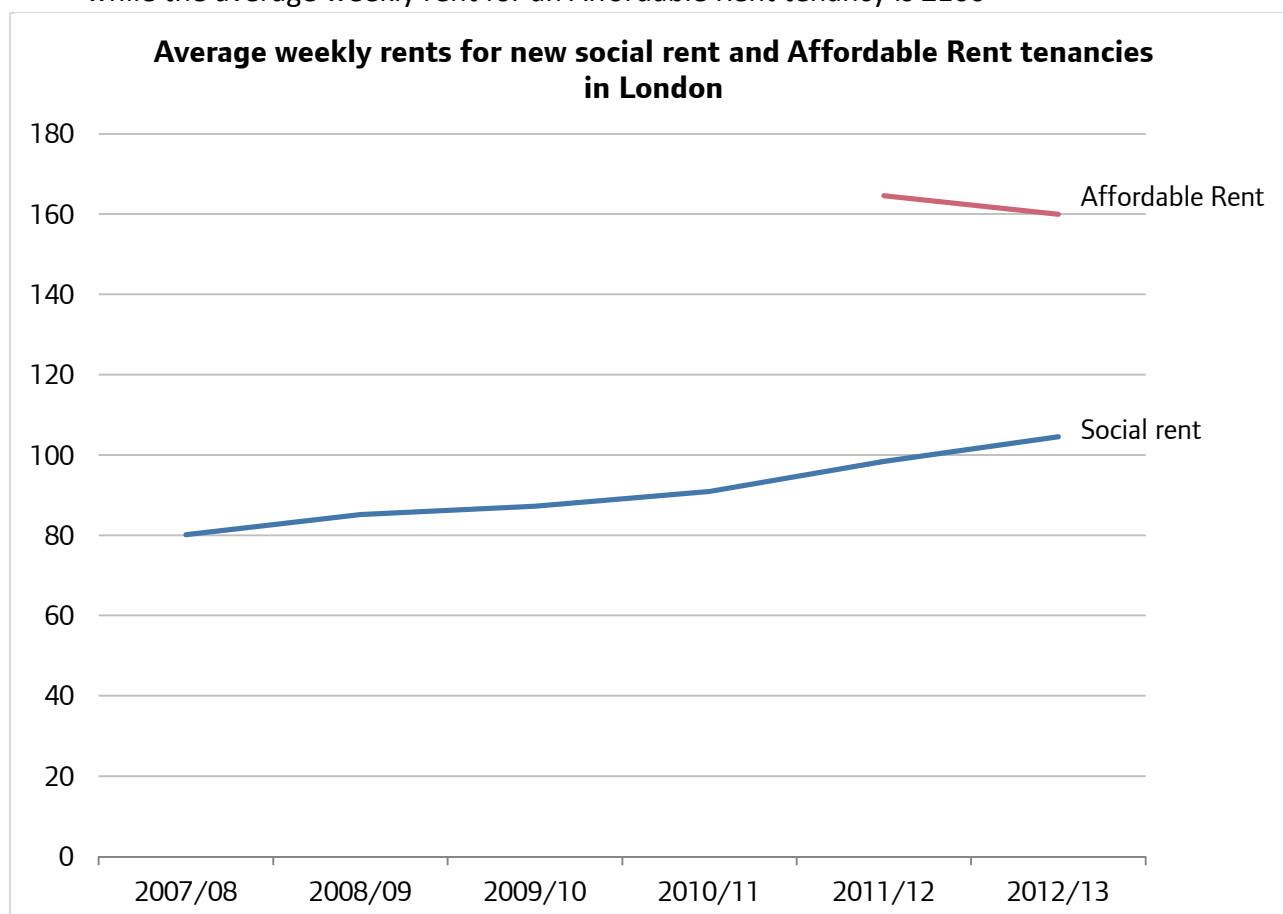


- Between January 2011 and November 2013 (the latest data currently available), the number of Housing Benefit (Local Housing Allowance) recipients in London's deregulated private rented sector rose by 15,250.
- In this period the caseload in Inner London fell by 3,110, while rising in Outer London by 18,360. The sharpest falls were in Westminster (with a fall of 2,500) and Kensington and Chelsea (a fall of 1,060). The largest increases were in Enfield (a rise of 2,590) and Barnet (a rise of 2,420).
- The falling caseload in high-cost areas is likely due in large part to the caps on LHA payments introduced in 2011, while growth in the caseload could be due to movement of benefit recipients, rising rents or falling incomes. Direct evidence of movement by benefit recipients in response to the caps is not currently available.

Sources and notes

- DWP, Stat Xplore
- Unlike the previous chart, this map excludes the minority of housing benefit recipients who still live in regulated rent properties.

4.25. Average rents for new social rented tenancies rose 6.2% in the last year to £105 a week, while the average weekly rent for an Affordable Rent tenancy is £160



- Rents for new general needs social housing tenancies have risen rapidly in recent years, in large part because they are based on an inflation-linked formula. The average rent for a new social rented tenancy in London in 2012/13 was £105 a week, a 6.2% increase from 2011/12 and a 30% increase from 2007/08.
- Affordable Rent tenancies were first introduced in 2011/12 and can be let at rents of up to 80% of the equivalent market rent. The average rent for a new Affordable Rent tenancy was £160 in 2012/13, down from £165 in 2011/12 (but as there were very few Affordable Rent lettings in 2011/12 this trend is not very significant)

Sources and notes

- DCLG, *Social Housing Lettings in England, 2012/13*

5 Housing need

Around 49,000 new homes are required every year in London over the next two decades, due to rapid population growth and the existing backlog of need (5.1). There are around 69,000 concealed families in London, 3.3% of all families in the city (5.2).

6,440 people were seen sleeping rough in London in 2012/13, more than double the figure seen in 2007/08 (5.3). The number of people seen sleeping rough for the first time is rising, but so too is the proportion who spend only one night on the streets (5.4). Just under half of the people seen sleeping rough in London in 2012/13 were from the UK, while the proportion from Central and Eastern Europe has risen rapidly in recent years (5.5). Most rough sleepers have a support need related to alcohol, drugs and/or mental health (5.6).

Almost 15,000 households were accepted as statutorily homeless in London in 2012/13, up 16% in a year and 28% of the national total (5.7). Almost 30,000 cases of homelessness were prevented or relieved in London in 2012/13, mostly when households were helped to remain in their current home (5.8). Most households accepted as homeless in London are from an ethnic minority group (5.9).

The number of homeless households living in temporary accommodation in London rose by 11% to 42,360 in September 2013 (5.10), but the average length of stay in temporary accommodation in London is falling (5.11).

Overcrowding rates are rising in London but are still far below the levels seen in previous decades (5.12). 8% of households in London are overcrowded, with much higher rates for social and private tenants than for homeowners (5.13). Overcrowding rates are highest in deprived parts of Newham, Brent and Ealing, and over the last decade fell in the city centre and rose sharply in pockets of Outer London (5.14). London has higher rates of overcrowding than other regions regardless of tenure (5.15).

5.1. Around 49,000 new homes are required every year in London over the next two decades, due to rapid population growth and the existing backlog of need

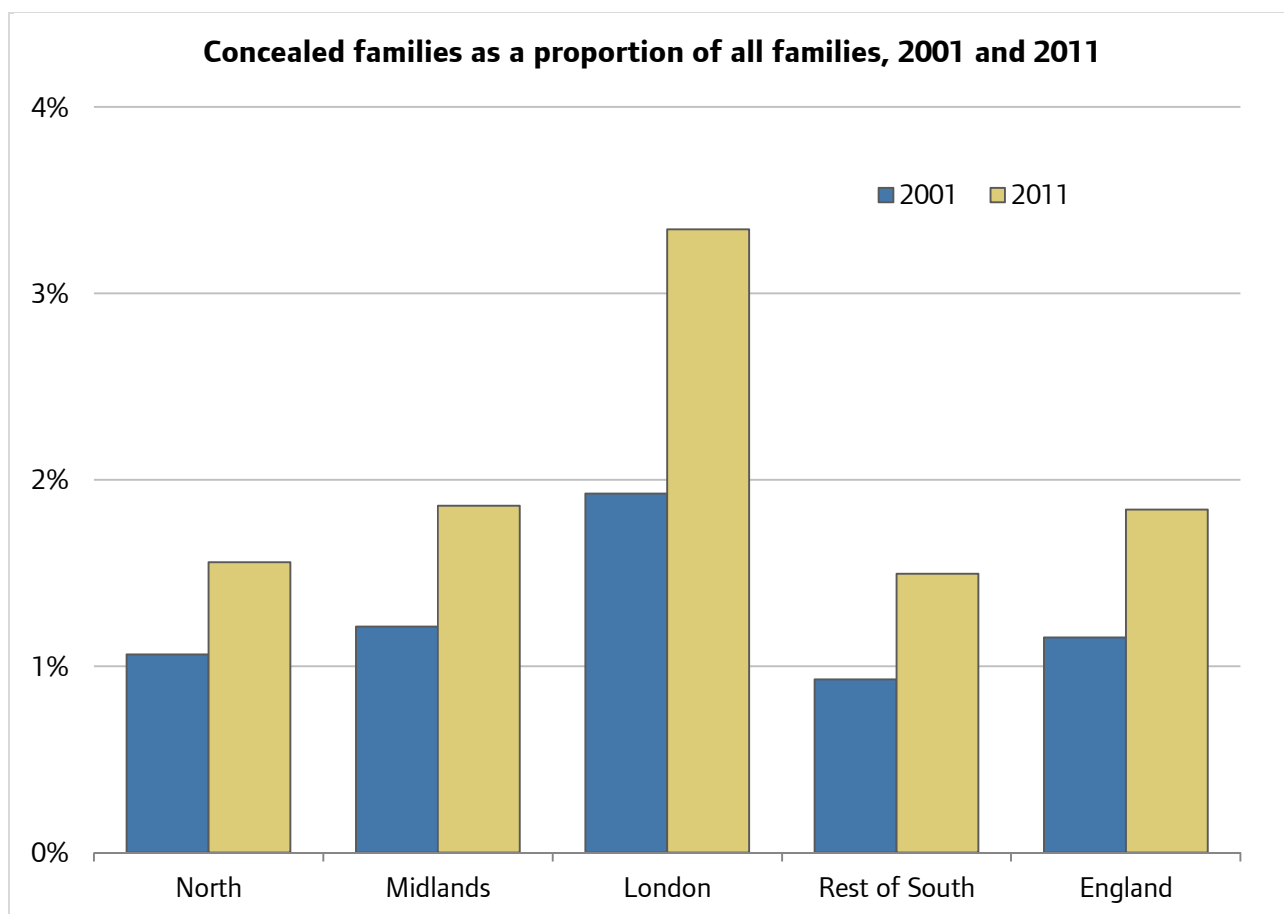


- The 2013 London Strategic Housing Market Assessment estimated London's need for new housing over the coming decades, taking into account projected household growth, affordability and the backlog of housing need.
- According to the SHMA estimates, London will need around 48,840 new homes every year between 2015 and 2035, of which 48% should be market homes, 32% social rent or Affordable Rent, and 20% intermediate.
- In terms of size, 34% of the estimated requirement is for homes with one bedroom, 18% with two, 26% with three and 22% with four or more.

Sources and notes

- GLA, 2013 London Strategic Housing Market Assessment

5.2. There are around 69,000 concealed families in London, 3.3% of all families in the city

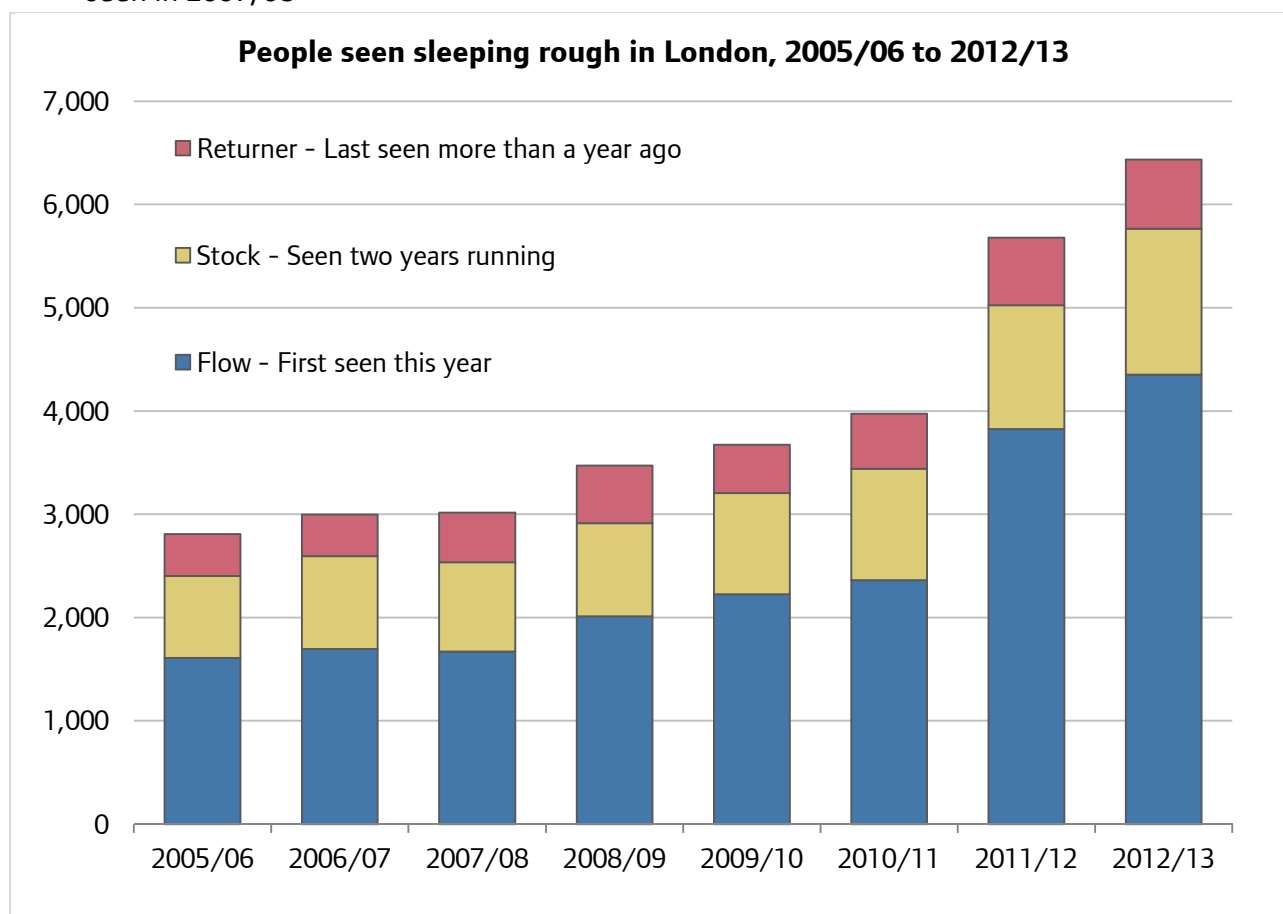


- A concealed family is one living in a multi-family household in addition to the primary family, such as a young couple living with parents. In London there were 69,000 concealed families recorded in the 2011 Census, equivalent to 3.3% of the 2,064,000 families in London and almost double the 35,000 concealed families recorded in 2001.
- London has a far higher rate of concealed families than other parts of the country, and also saw the highest increase in its rate over the decade, up from 2.0% in 2001. Across England as a whole concealed families rose from 1.2% of the total in 2001 to 1.8% in 2011.
- Newham had the highest proportion of concealed families in the country, at 7.5% of all families in the area.

Sources and notes

- ONS, 2011 Census
- The 2013 London Strategic Housing Market Assessment also estimated the number of concealed households in London, but using a different methodology based on household survey data.

5.3. 6,440 people were seen sleeping rough in London in 2012/13, more than double the figure seen in 2007/08

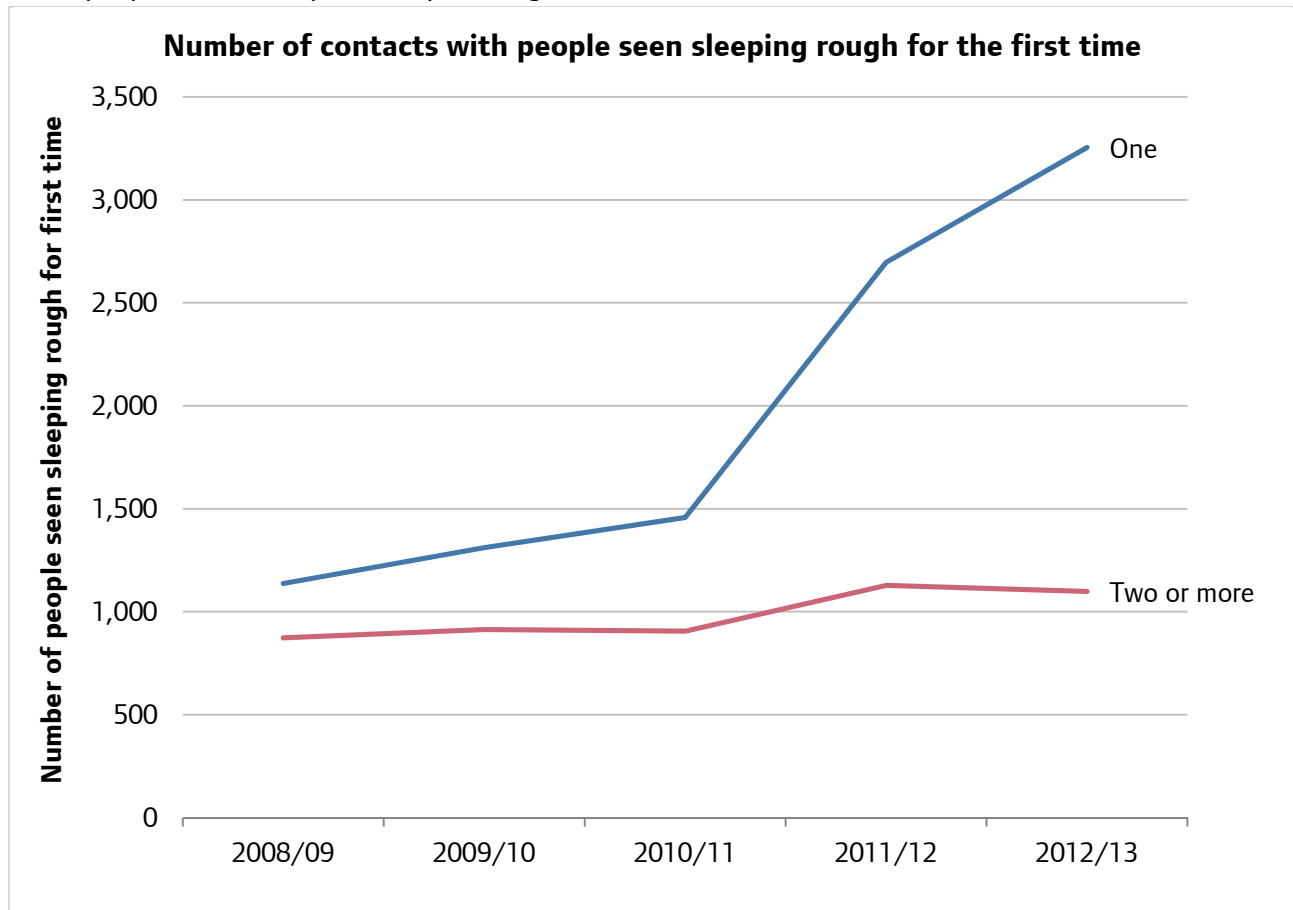


- There were 6,440 people seen sleeping rough in London in 2012/13, an increase of 13% on the 2011/12 figure and more than double the number seen in 2007/08.
- 4,350 people were seen sleeping rough for the first time this year. This 'flow' of new people onto the streets has grown by 14% since 2011/12 and by 160% since 2007/08, but most of them do not spend a second night sleeping rough.
- The 'stock' figure is the number of people seen sleeping rough two years in a row, and has grown by 18% in the last year to 1,410. The 'returner' figure is those who were last seen sleeping rough before 2011/12, and has grown by 3% to 670.

Sources and notes

- *Broadway, Street to home annual report 2012/3*

- 5.4. The number of people seen sleeping rough for the first time is rising, but so too is the proportion who spend only one night on the streets

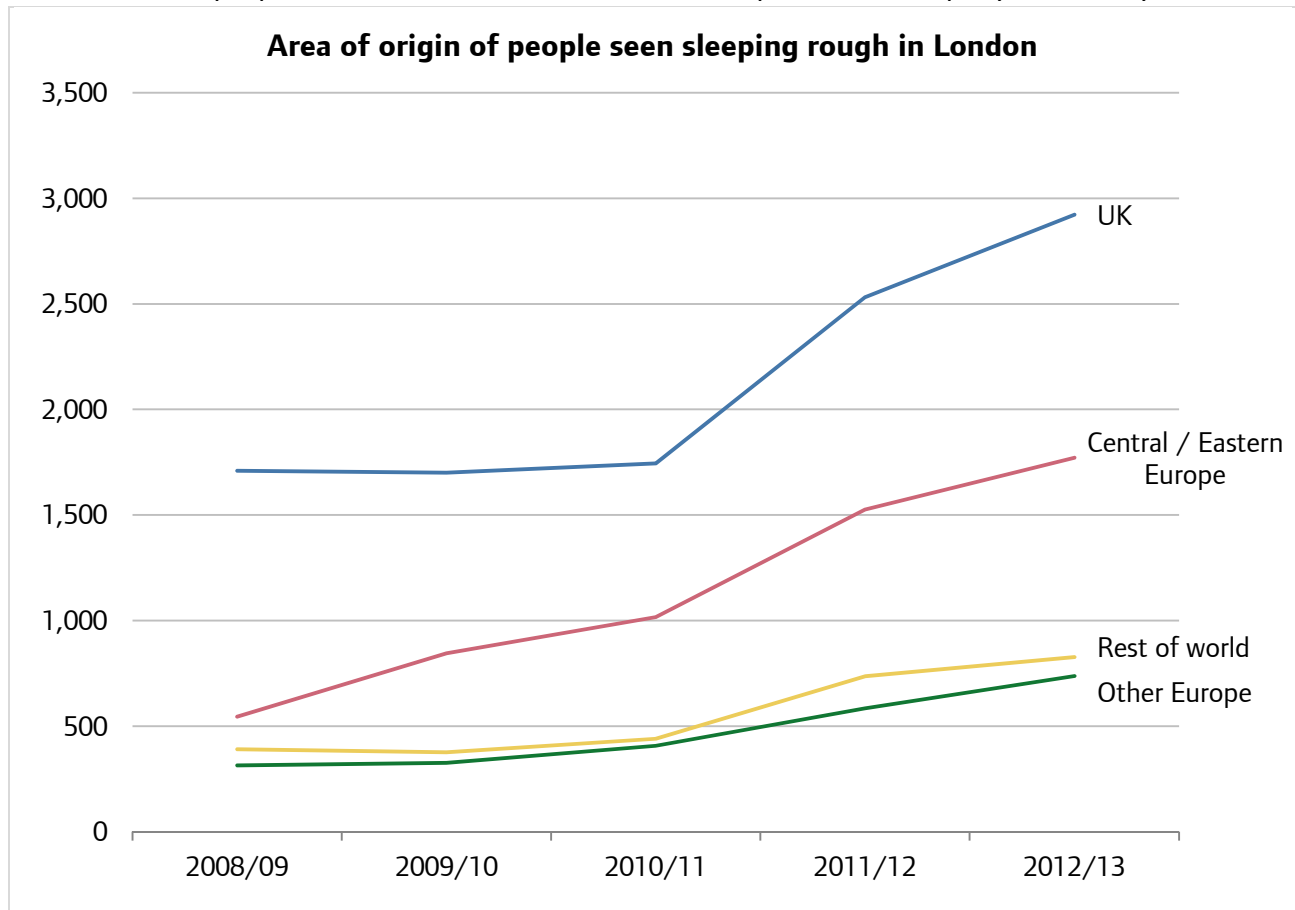


- 3,260 people, 75% of those new to the streets in 2012/13, were seen sleeping rough only once, up from 70% in 2011/12 and 57% in 2008/09.
- 1,100 new people were seen sleeping rough more than once in 2012/13, down slightly from 1,129 in 2011/12.
- The rising proportion of people who spend only one night sleeping rough is largely the result of a coordinated effort to help rough sleepers off the streets under the Mayor's 'No Second Night Out' scheme.

Sources and notes

- *Broadway, Street to home annual report 2012/3*

5.5. Just under half of the people seen sleeping rough in London in 2012/13 were from the UK, while the proportion from Central and Eastern Europe has risen rapidly in recent years

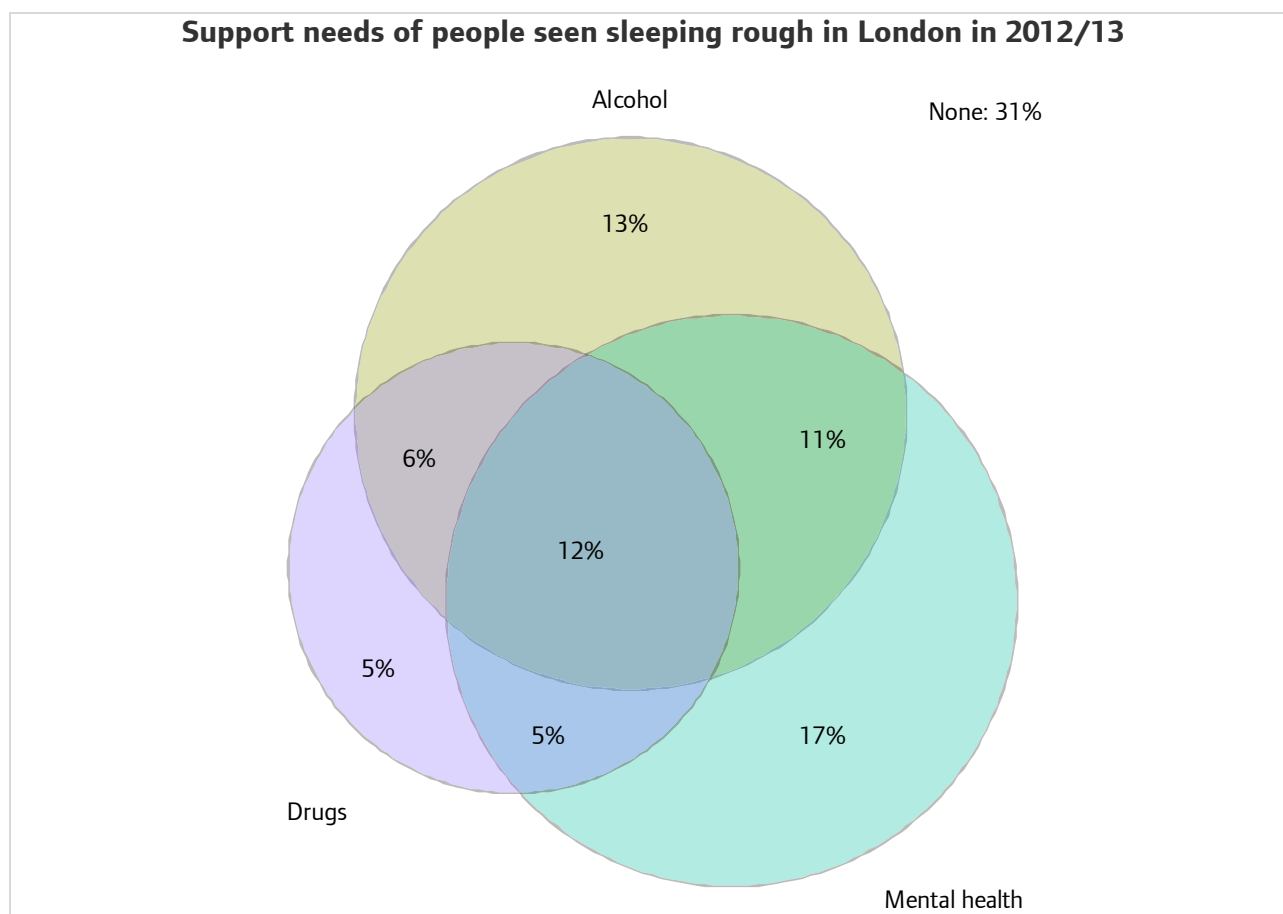


- People from the UK accounted for 2,920 of those seen sleeping rough in London in 2012/13, 47% of the total. The UK share has been steady for the last few years but is down from 58% in 2008/09.
- The biggest increase in proportional terms in recent years has been people from Central or Eastern Europe, of whom 1,770 were seen sleeping rough in 2012/13, 28% of the total.
- The rest of the world accounted for 1,560 people, or 24% of the total seen in 2012/13, a similar share to previous years.

Sources and notes

- *Broadway, Street to home annual report 2012/3*

5.6. Most rough sleepers have a support need related to alcohol, drugs and/or mental health

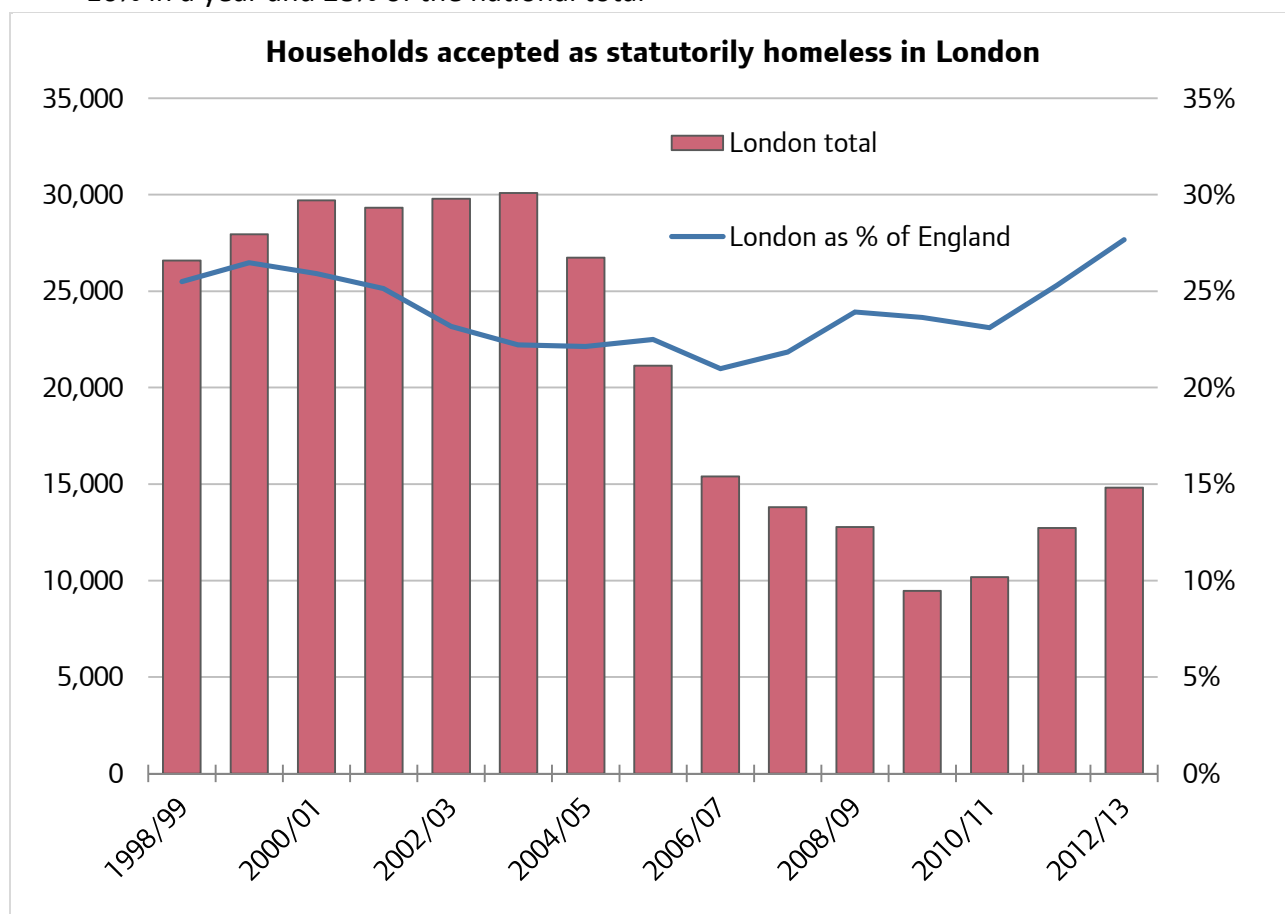


- 44% of people seen sleeping rough in London in 2012/13 were recorded as having a support need relating to mental health, 41% to alcohol and 28% to drugs.
- There was considerable overlap between these support needs, with 12% of people having support needs related to all three. 31% had no support needs in these categories.
- The proportion of people with an alcohol related support need has fallen from 52% in 2010/11. The proportion with a drugs related support need has fallen slightly from 32% while mental health needs have remained steady.

Sources and notes

- *Broadway, Street to home annual report 2012/3*

5.7. Almost 15,000 households were accepted as statutorily homeless in London in 2012/13, up 16% in a year and 28% of the national total

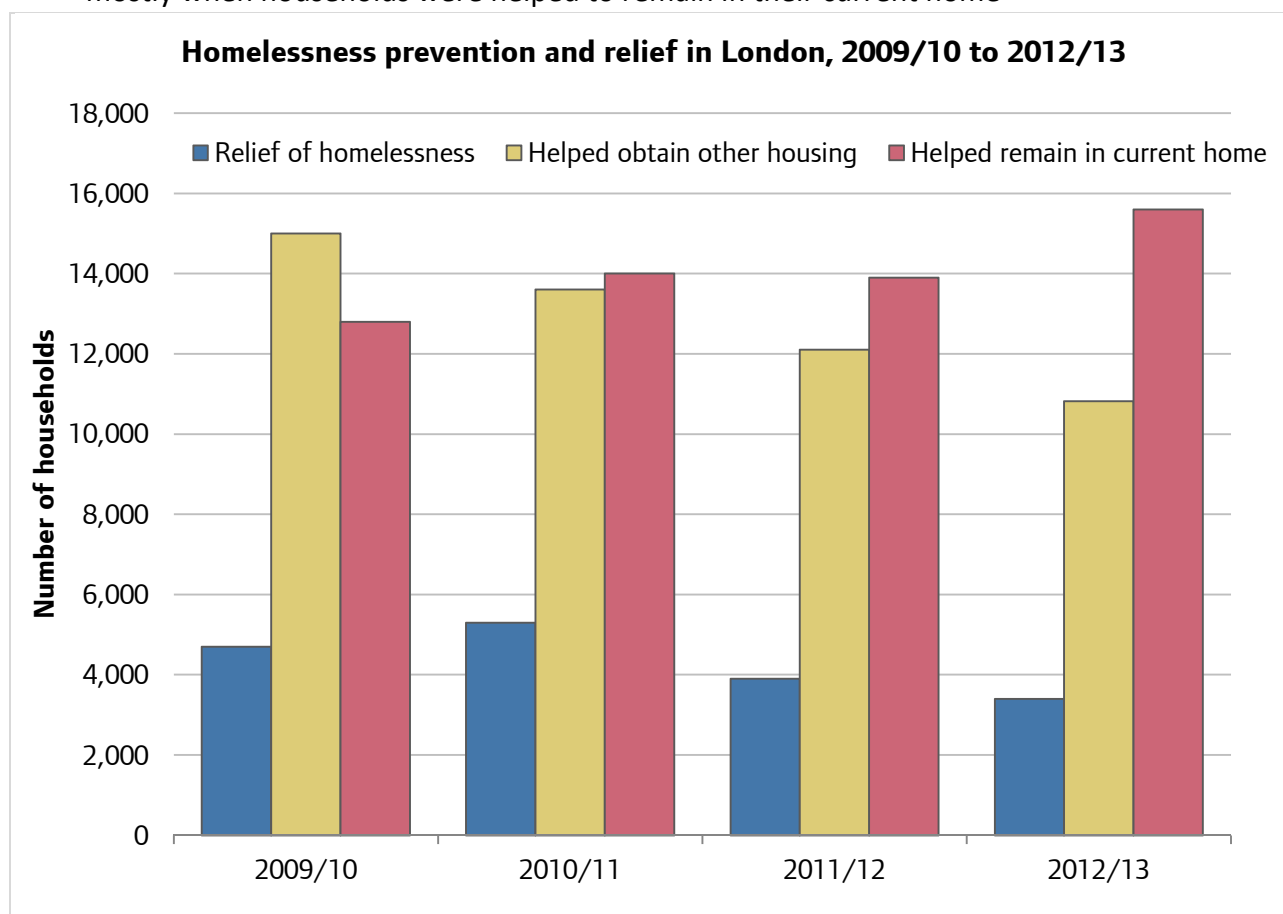


- There were 14,810 households accepted as statutorily homeless by London boroughs in 2012/13, up 16% from 12,720 in 2011/12 and 57% from a low of 9,460 in 2009/10 - but still well below the peak of 30,080 in 2003/04.
- London's share of all homelessness acceptances in England has however risen to a new high of 28%, up from 25% in 2011/12.

Sources and notes

- DCLG, Housing live table 784

- 5.8. Almost 30,000 cases of homelessness were prevented or relieved in London in 2012/13, mostly when households were helped to remain in their current home

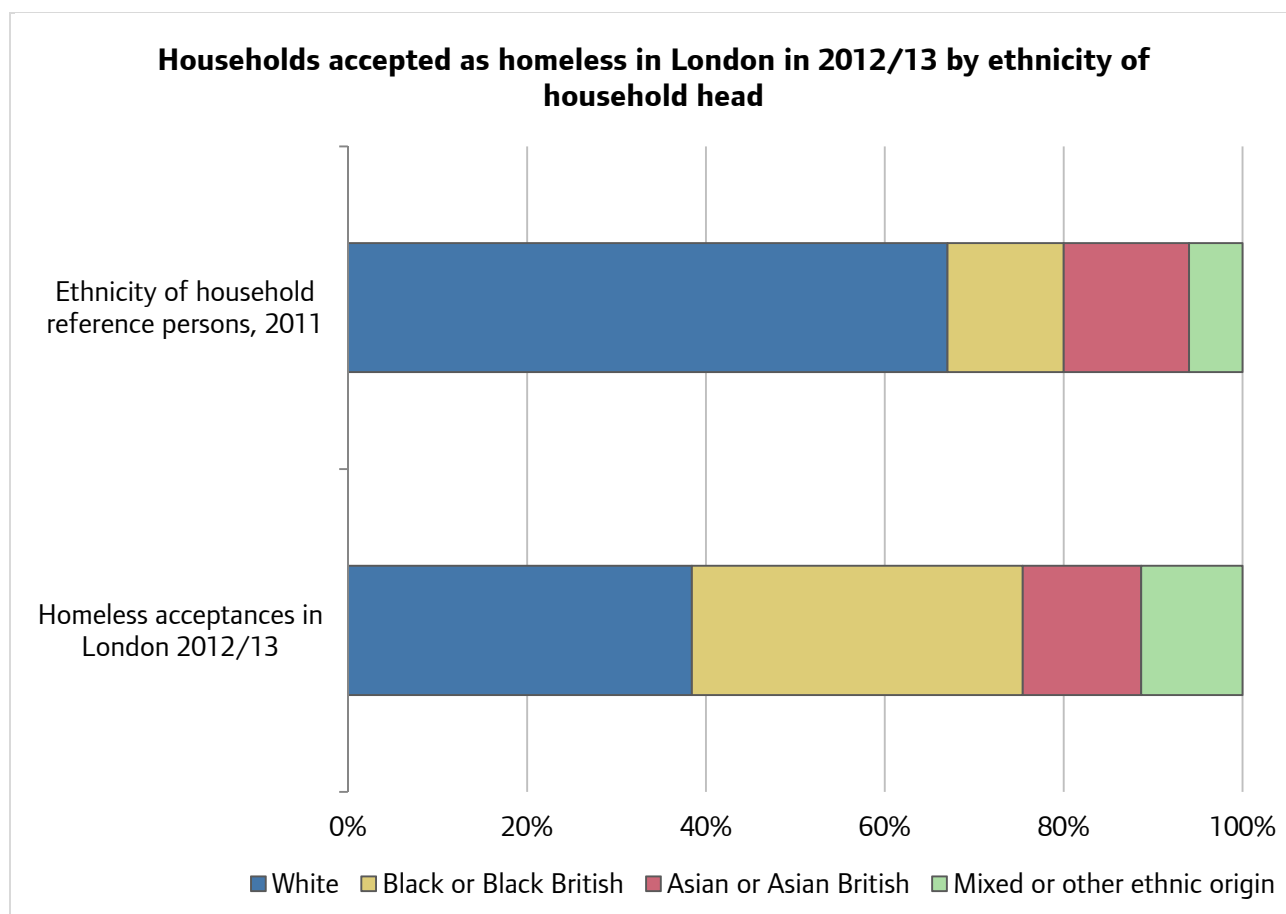


- Homelessness prevention involves helping people avoid homelessness by obtaining other accommodation or remaining in their current home, while homelessness relief refers to cases where a homeless household is helped to secure accommodation without being accepted as statutorily homeless.
- In 2012/13 London boroughs prevented homelessness in 26,420 cases and relieved homelessness in 3,900 cases, for a total of 29,820, up very slightly from 29,800 in 2011/12.
- The number of households helped to obtain other housing has fallen from 15,000 in 2009/10 to 10,820 in 2012/13, while the number helped to remain in their current home has risen from 12,800 to 15,600.

Sources and notes

- DCLG, *Housing live table 792*

5.9. Most households accepted as homeless in London are from an ethnic minority group

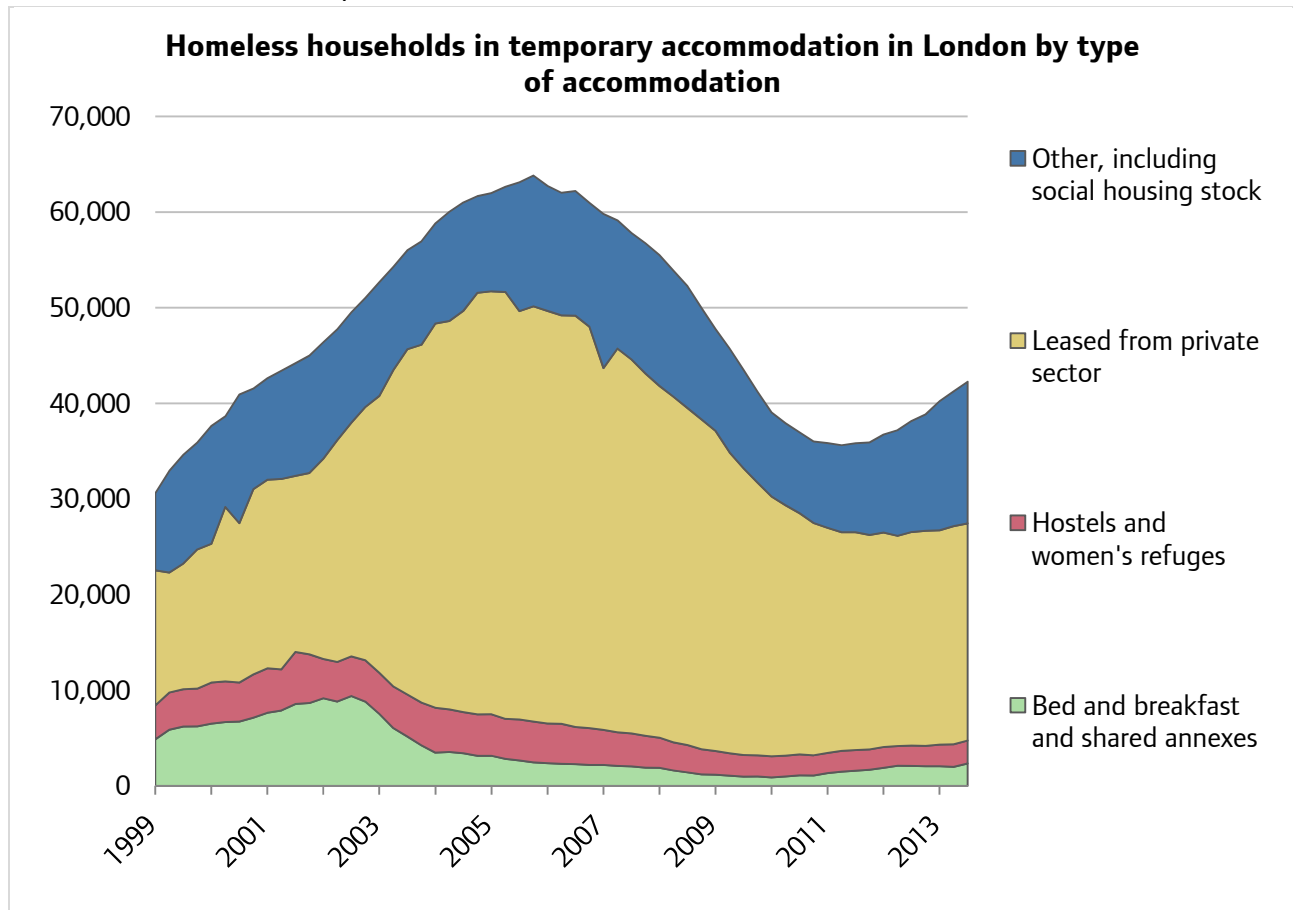


- Households from ethnic minority groups are disproportionately likely to become statutorily homeless, reflecting greater exposure to risk factors such as poverty, deprivation and overcrowding.
- Households with a White head (including both White British and other White ethnic groups) comprised 67% of all households in London in 2011, but just 38% of households accepted as statutorily homeless in 2012/13.
- Black or Black British households comprised 13% of all London households in 2011 but 37% of those accepted as homeless in 2012/13.

Sources and notes

- DCLG, *Housing live table 784*, and
ONS, *2011 Census*

5.10. The number of homeless households living in temporary accommodation in London rose by 11% to 42,360 in September 2013

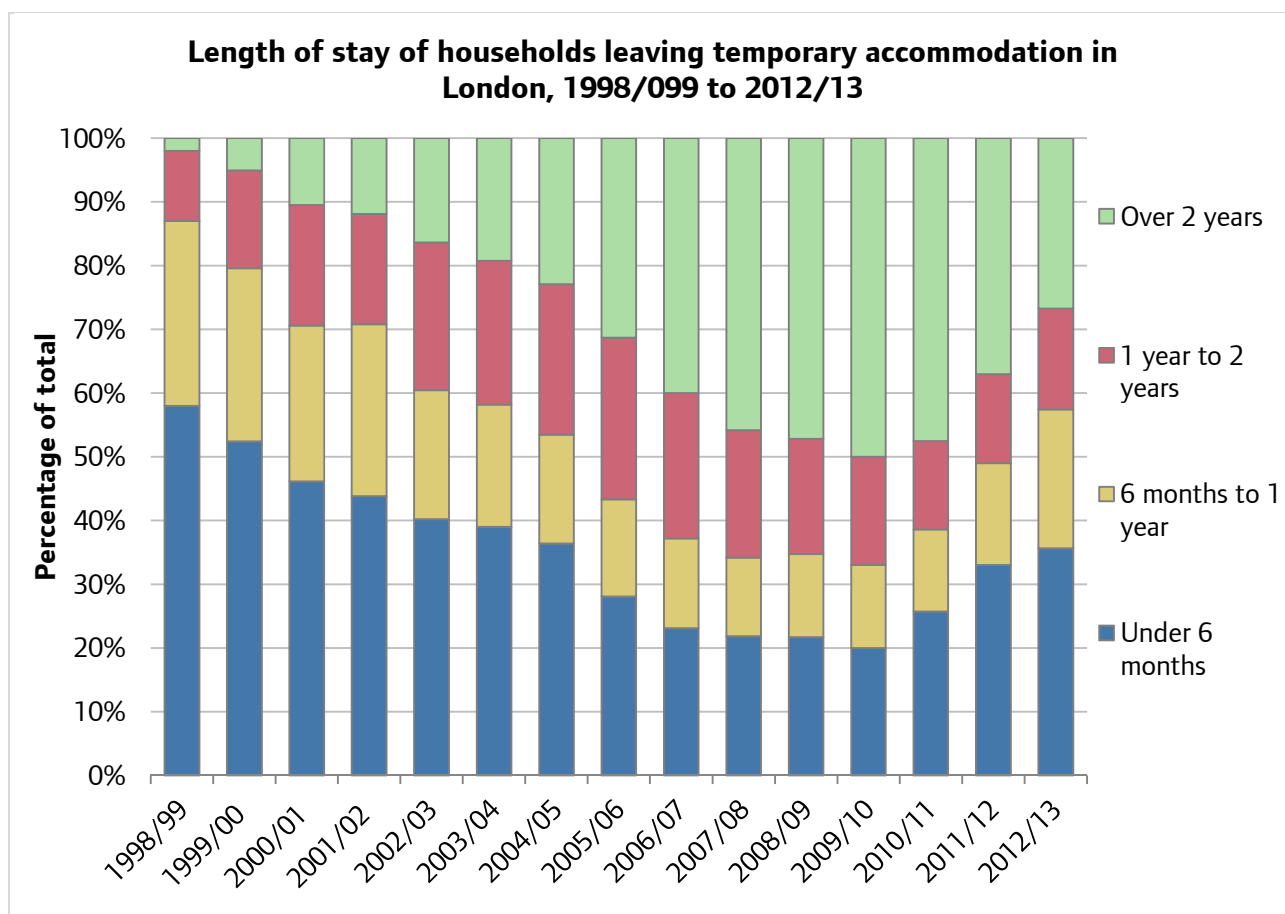


- In September 2013 there were 42,260 homeless households in temporary accommodation arranged by London boroughs, an increase of 11% from 2012 and 14% from 2010.
- 22,710 of the households in temporary accommodation in September 2013 were in accommodation leased from private sector landlords, 2,400 were in hostels and women's refuges, 2,340 in bed and breakfast hotels, and 14,810 were in other accommodation, including social housing.
- Since September 2010 the number of households in bed and breakfast accommodation has more than doubled (albeit from a low base, and still well below the levels seen in 2002), while the number in privately leased accommodation has fallen 10%.

Sources and notes

- DCLG, P1E homelessness data

5.11. The average length of stay in temporary accommodation in London is falling

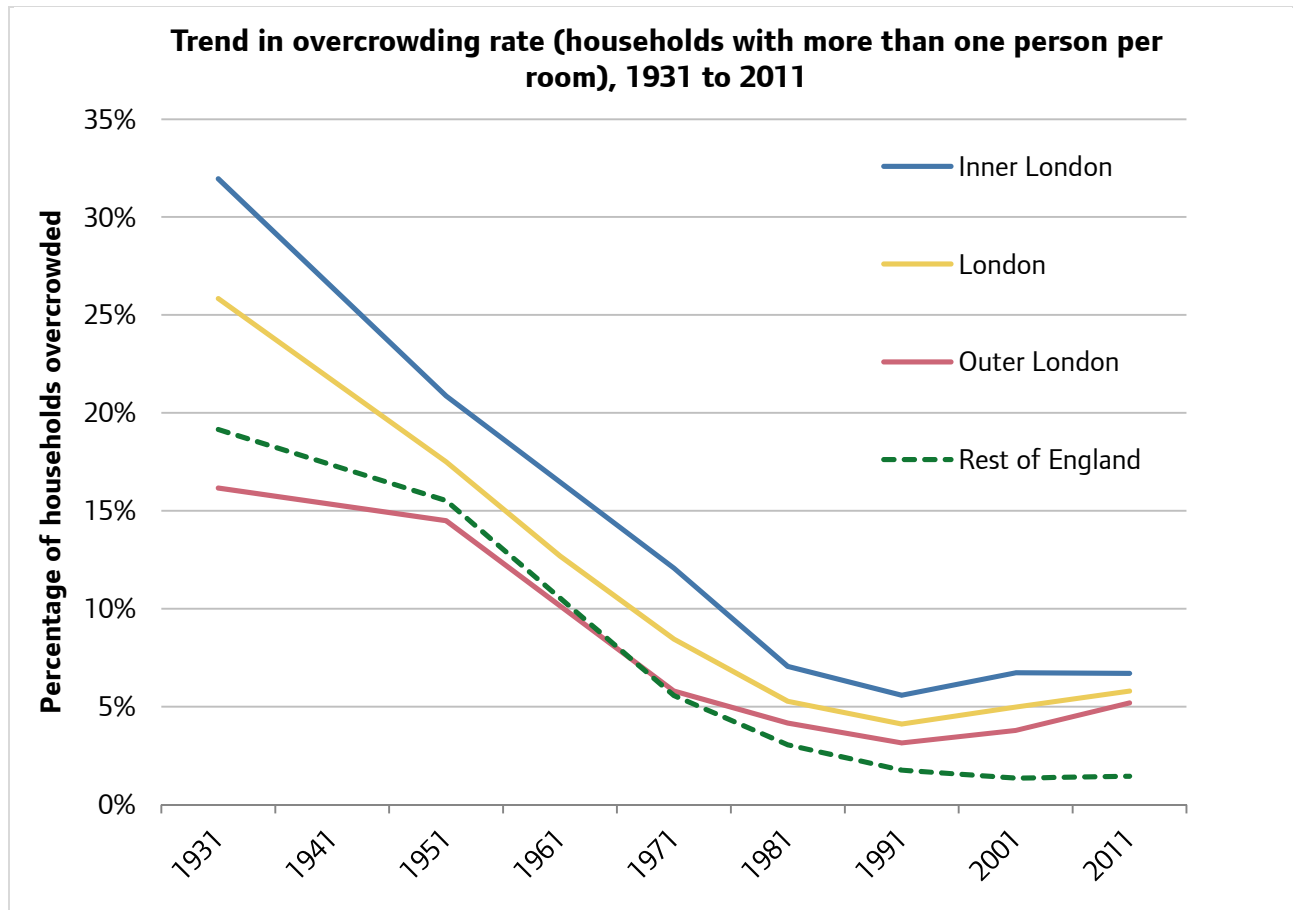


- 12,820 homeless households left temporary accommodation in London in 2012/13, equivalent to 35% of the total in temporary accommodation at the start of the year.
- Of those households who left, 37% had been in temporary accommodation for under six months, 26% for between six months and a year, 15% for between one and two years, and 32% for more than two years.
- The typical length of stay has shortened in recent years, with the proportion staying over two years falling from 50% in 2009/10, and the proportion staying under six months rising from 20%.

Sources and notes

- DCLG, Housing live table 779

5.12. Overcrowding rates are rising in London but are still far below the levels seen in previous decades

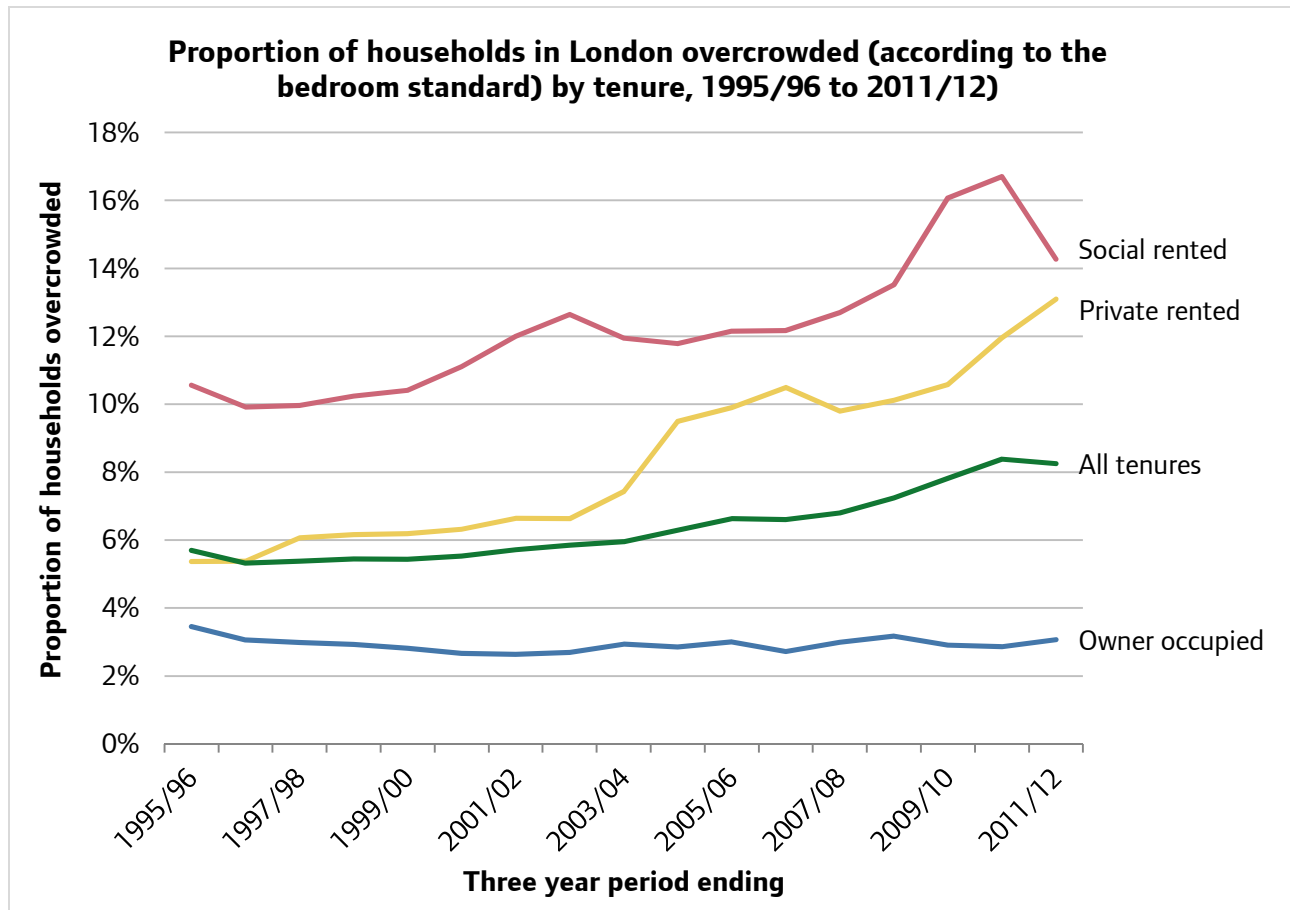


- One measure of overcrowding is whether households have more than one person per room (including bedrooms, kitchens and living rooms but not bathrooms, toilets, storage rooms, halls or landings). By this measure a quarter of households in London were overcrowded in 1931, a figure which fell to 4.1% in 1991.
- The overcrowding rate then rose to 5.0% in 2001 and 5.8% in 2011, compared to a very minor increase from 1.4% to 1.5% in the rest of England.
- While Inner London has always been more overcrowded than Outer London, the overcrowding rate was flat in Inner London between 2001 and 2011 at 6.7% but rose in Outer London from 3.8% to 5.2%.

Sources and notes

- 1931 to 2001 from *A Vision of Britain through Time* website,
- 2001 and 2011 from ONS Census data

5.13. 8% of households in London are overcrowded, with much higher rates for social and private tenants than for homeowners



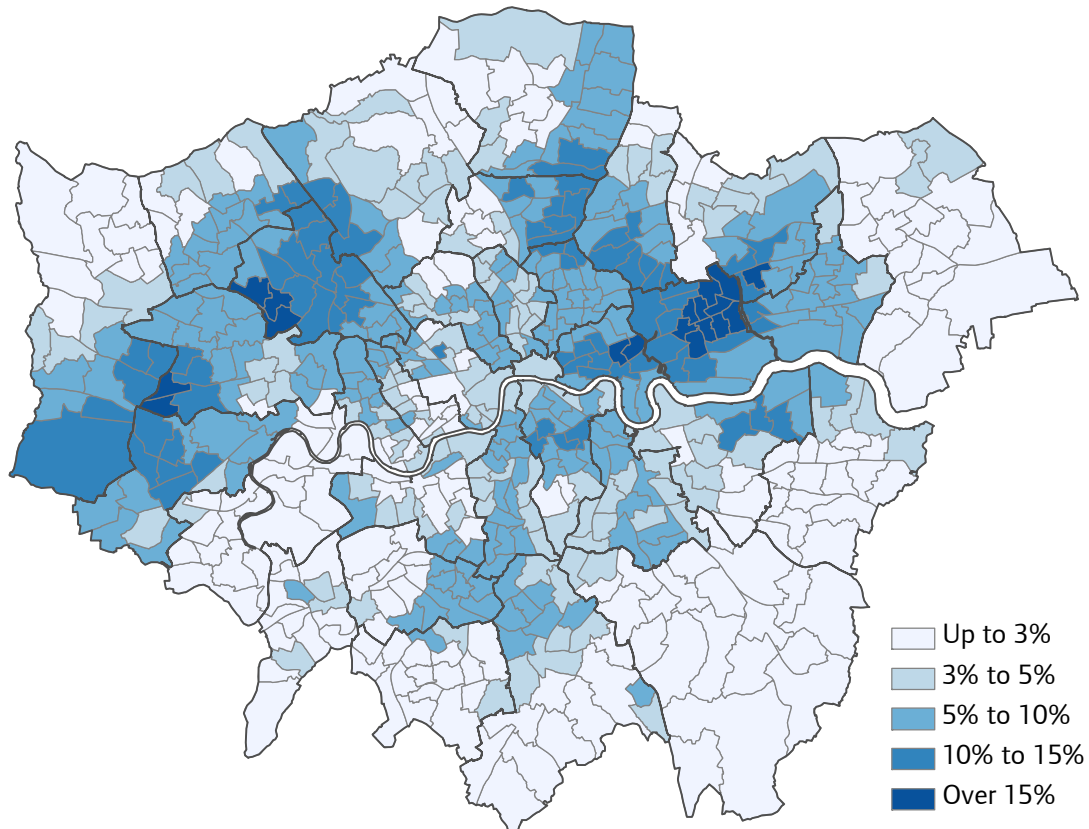
- Around 8% of households in London are estimated to be overcrowded according to the bedroom standard, which compares the size and composition of households to the bedrooms available.
- But while the overcrowding rate in owner occupied housing has been steady at around 3% for over a decade, overcrowding rates have risen rapidly in both social and private rented housing, to 14% and 13% respectively.
- The estimated overcrowding rate in social housing fell in the last year but the change is not statistically significant, and it remains to be seen whether it will be sustained.

Sources and notes

- DCLG, data from Survey of English Housing and English Housing Survey
- Rolling three year averages used

5.14. Overcrowding rates are highest in deprived parts of Newham, Brent and Ealing

Proportion of households with more than one person per room by ward, 2011

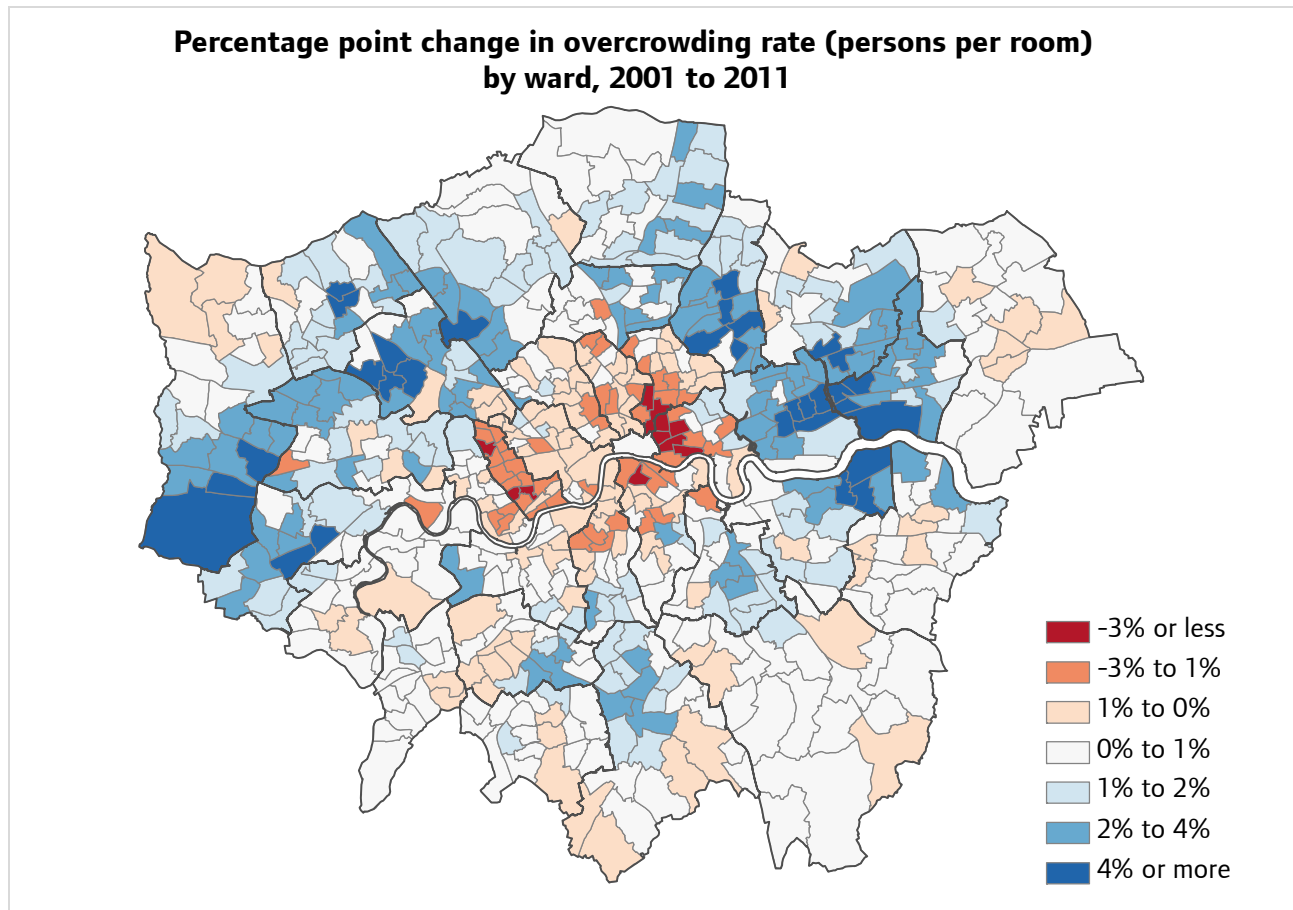


- At ward level there is enormous variation in overcrowding rates across London, with just one in two hundred households overcrowded in some neighbourhoods compared to one in five in others (measured by persons per room).
- Wards with the lowest overcrowding rates of 0.5% are found in Bromley and Havering, and altogether there are 25 wards with fewer than 1% of households overcrowded, all of them in outer suburban areas.
- The highest overcrowding rate is in Newham's Green Street East ward where 24% of households are overcrowded by this measure. In other boroughs Wembley Central in Brent and Southall in Ealing have overcrowding rates of around 20%.

Sources and notes

- ONS, 2011 Census

5.15. Over the last decade, overcrowding rates fell in the city centre and rose sharply in pockets of Outer London

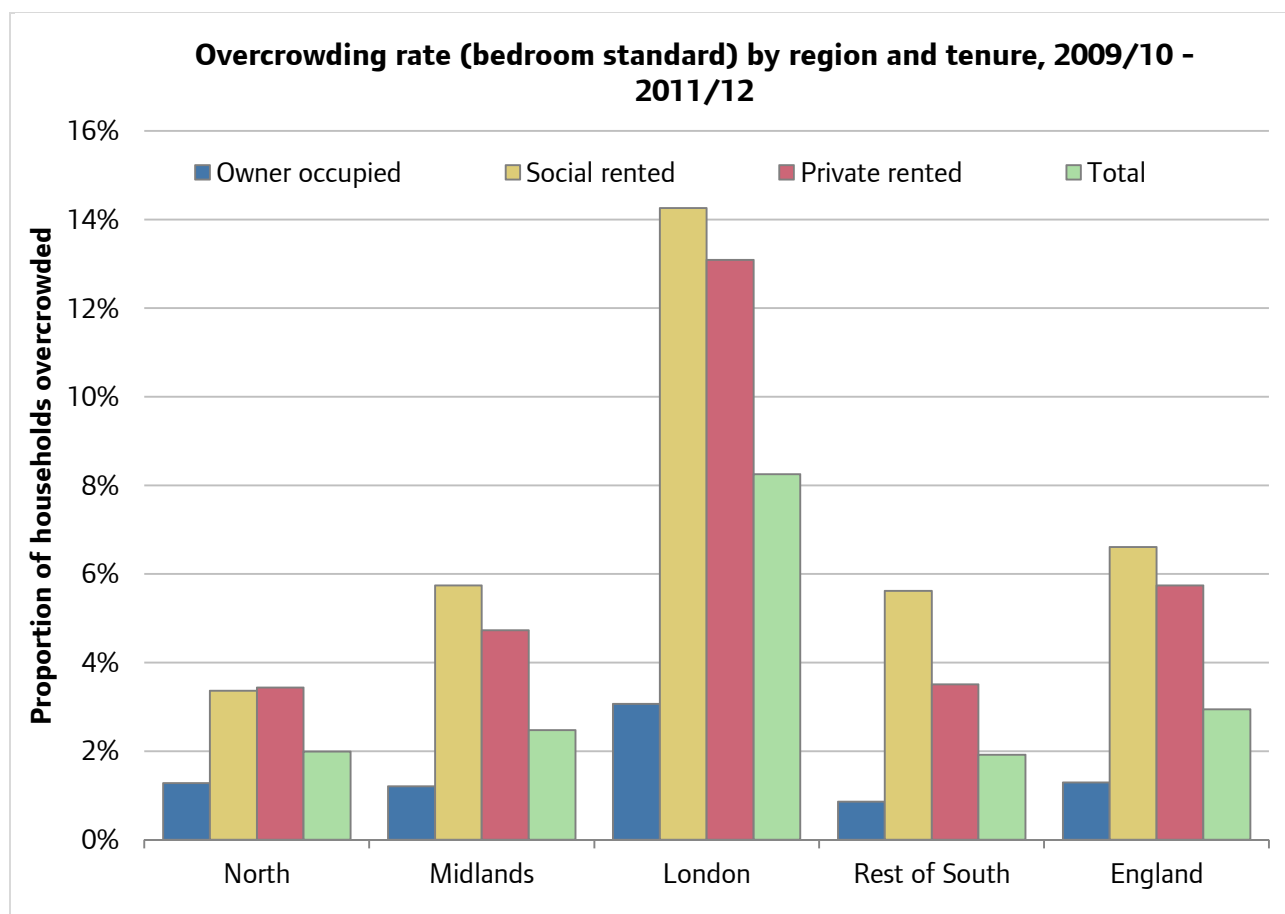


- Inner London has historically had significantly higher rates of overcrowding, but between 2001 and 2011 it saw the biggest falls in overcrowding rates, particularly in areas of Tower Hamlets that previously had high levels of overcrowding such as Whitechapel and Spitalfields.
- The biggest increases in overcrowding were scattered across a range of Outer London neighbourhoods, some of which like Plumstead and Hounslow Central had previously had relatively little overcrowding.
- The biggest increase in overcrowding over the decade was in Wembley Central in Brent, where 21% of households were overcrowded in 2011 compared to 14% in 2001.

Sources and notes

- ONS, 2011 Census

5.16. London has higher rates of overcrowding than other regions regardless of tenure



- Across all tenures 8% of households in London are overcrowded, compared to 3% in England as a whole.
- In all parts of the country homeowners have the lowest rates of overcrowding, with 3% of homeowners in London overcrowded compared to 1% in the rest of the country.
- Private and social tenants are more likely to be overcrowded everywhere, but overcrowding rates are still more than twice as high in London as elsewhere.

Sources and notes

- *English Housing Survey, 2009/10 to 2011/12*

6 Mobility and decent homes

One in nine London households and one in three private renters have lived in their current home for less than a year (6.1). More than two thirds of all moves in London in the last year were either into or within the private rented sector (6.2). The most common reasons given by households moving house in London are to move to a better area, to a larger home or for job related reasons (6.3).

Just over 200 social housing tenants moved out of London through the Seaside and Country Homes scheme in 2012/13, freeing up their home for households in need (6.4). Over a thousand social rented homes in London have been freed up through the scheme since 2007/08 (6.5). Most moves into social housing in London are local, with 17% moving across borough boundaries and just 1% from other regions (6.6).

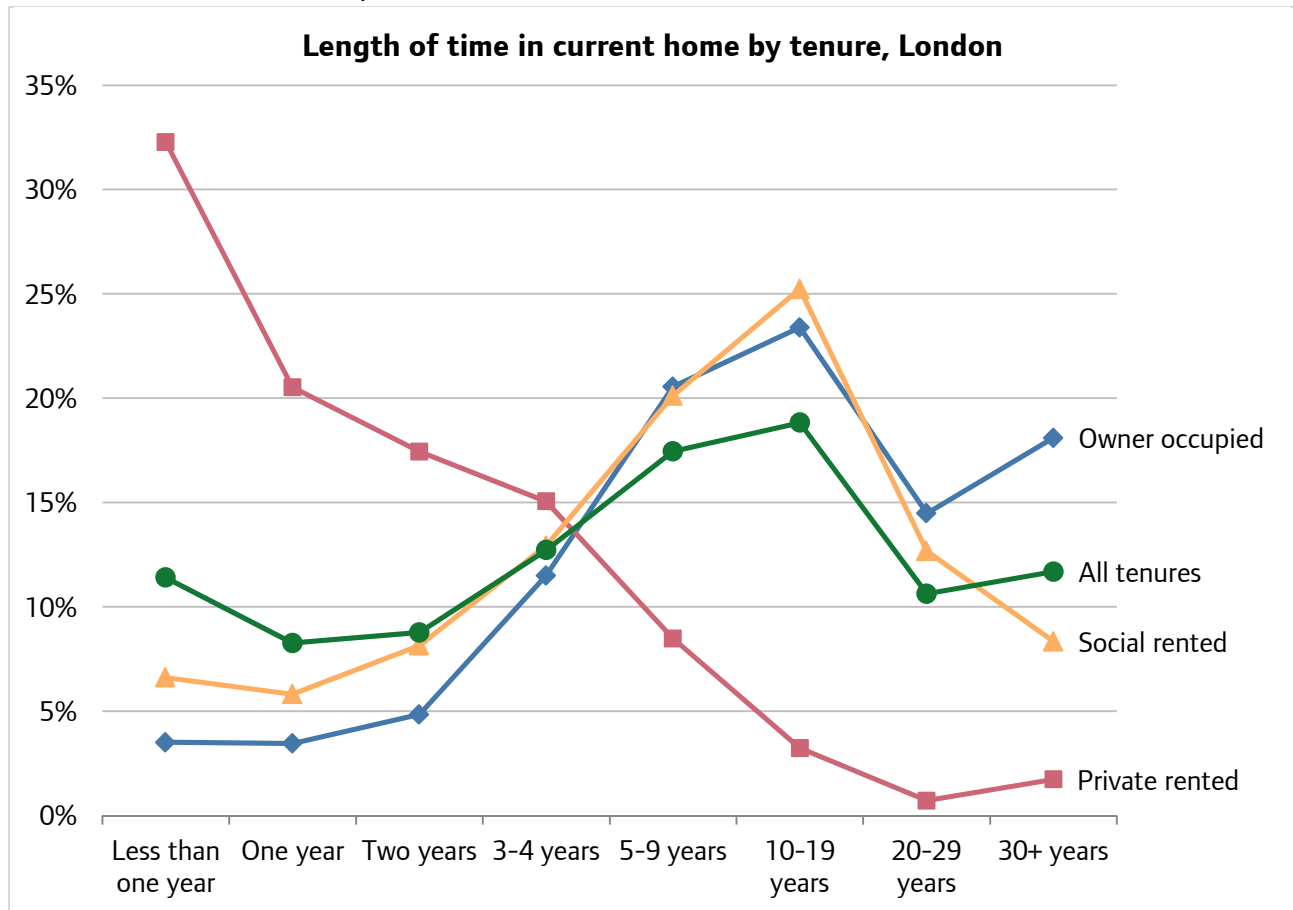
Under-occupation rates are far higher in owner occupied housing than in either of the rented tenures (6.7). The number of 'lifetime homes' and wheelchair accessible homes approved in London has risen in recent years (6.8).

Most pre-World War II homes in London are in the market sector, while affordable homes comprise a much higher share of those built in the first few post-war decades (6.9). Homes in Multiple Occupation comprise 7% of London's private housing stock, a much higher rate than in other areas (6.10).

Around 22% of homes in London are below the official Decent Homes standard (6.11). The proportion of homes below the standard has fallen faster in London than in the rest of England since 2006 (6.12), with rapid improvements made across all tenures in recent years (6.13). The number of affordable homes in London below the standard has fallen from 260,300 in 2005 to 90,200 in 2013 (6.14). London has a relatively low proportion of households who say they require a home adaptation due to disability – but a relatively high proportion of these say they need to move (6.15).

Per capita greenhouse gas emissions from London's housing stock have fallen in recent years (6.16). On average, private sector homes in London are significantly less energy efficient than affordable homes (6.17). Almost 330,000 homes in London received loft or cavity wall insulation under the CERT scheme (6.18). Around a tenth of London households are estimated to be living in fuel poverty, a relatively low rate compared to other regions (6.19).

6.1. One in nine London households and one in three private renters have lived in their current home for less than a year

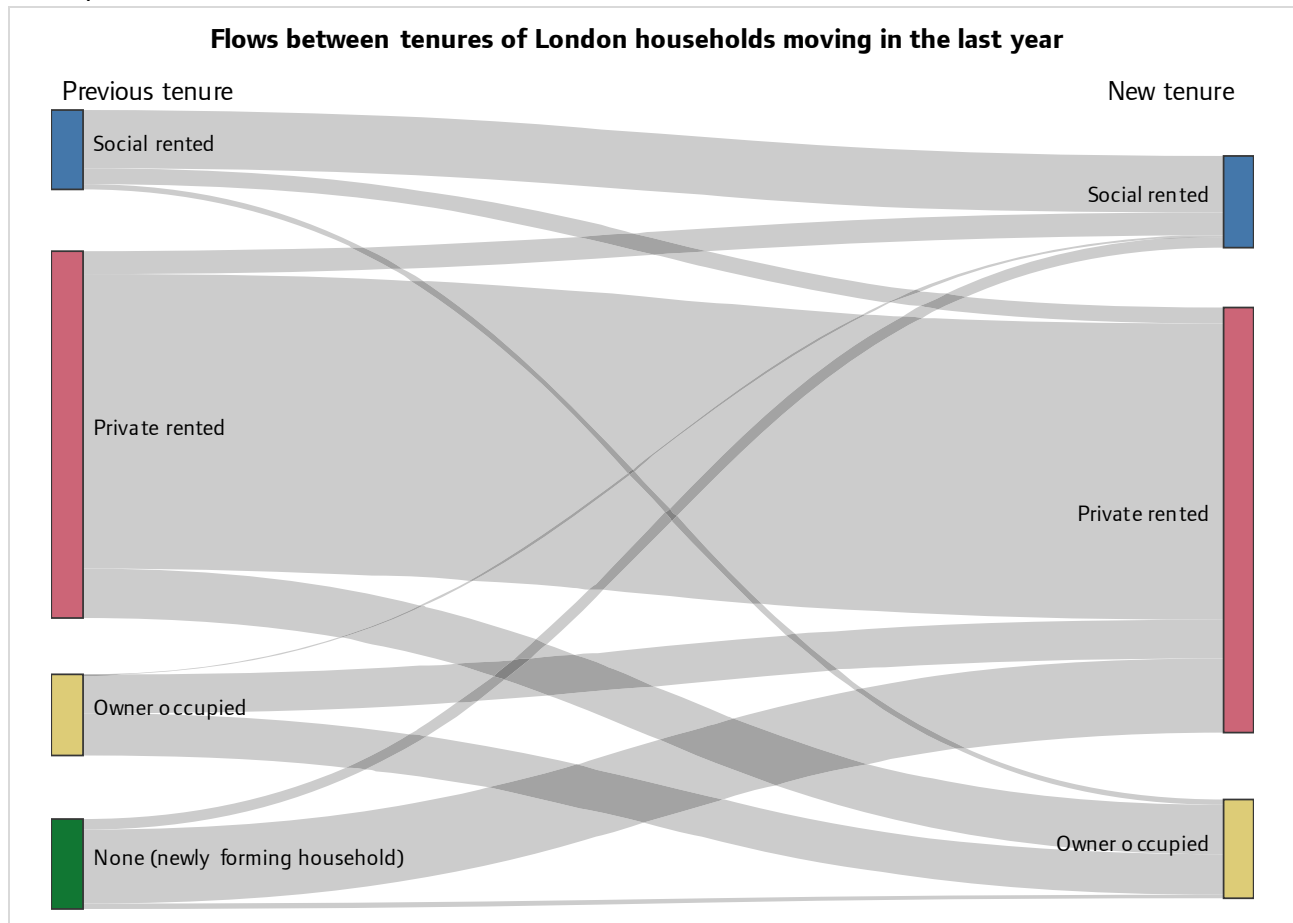


- 11% of households in London moved in the last year, while 59% have lived more than five years at their current home, 41% more than ten years and 22% more than 20 years.
- Mobility is far higher in the private rented sector, where 32% of households have moved in the last year, compared to 7% of social renting households and 4% of owner occupiers.
- While mobility rates for individual tenures are similar in London and the rest of England, London has a higher overall mobility rate due to its larger private rented sector.

Sources and notes

- English Housing Survey, 2009/10 to 2011/12

6.2. More than two thirds of all moves in London in the last year were either into or within the private rented sector

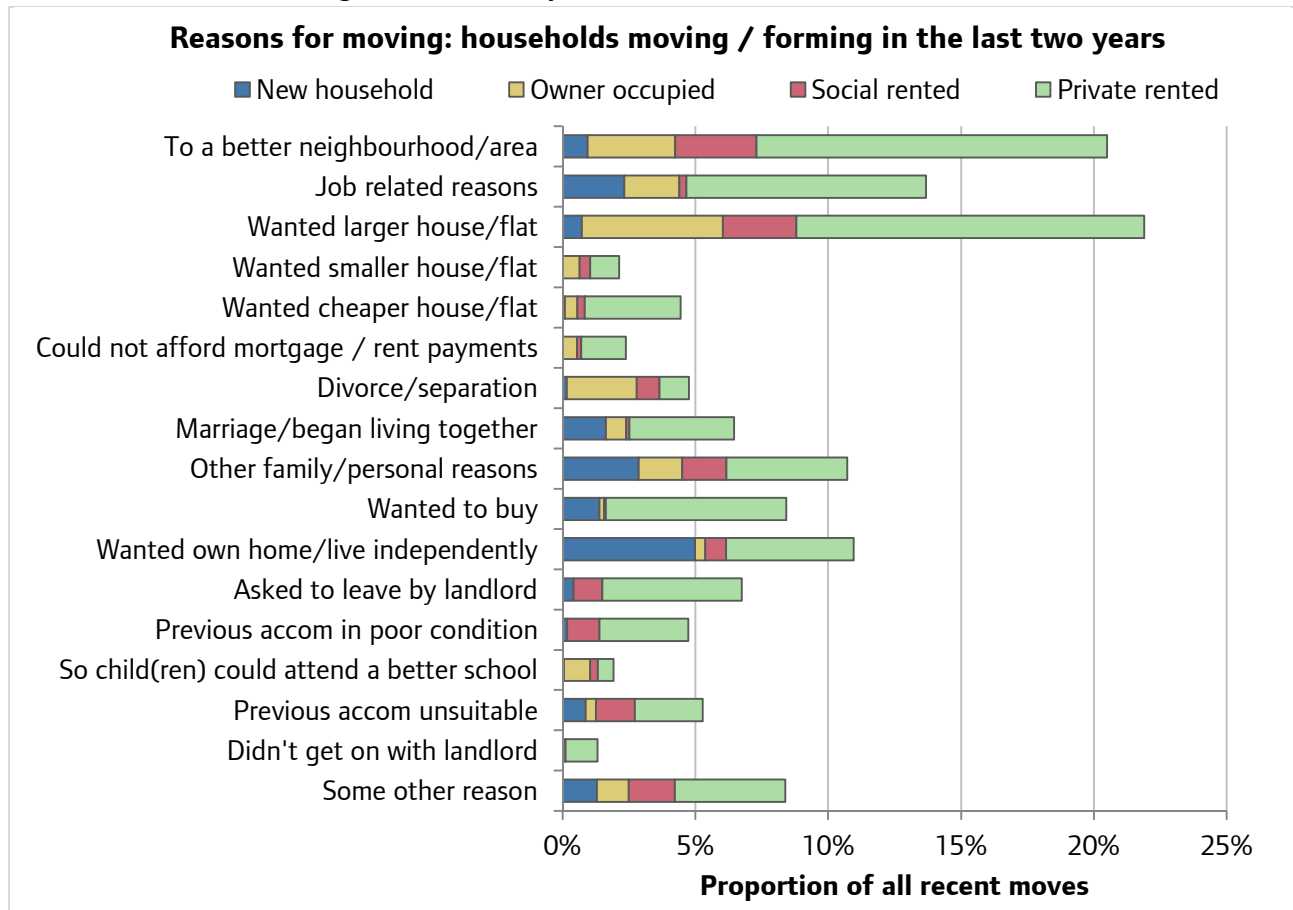


- Around 11% of households in London moved in the last year (including those who moved to London from elsewhere), and 69% of those moves were either into or within the private rented sector.
- Newly forming households accounted for 14% of moves, the vast majority of which were into the private rented sector, with a small number of newly forming households moving into social housing and even fewer into owner occupation.
- 16% of moves were into owner occupation, of which half were people moving from private renting, with most of the remainder comprising owner occupiers moving within the tenure.
- 15% of moves were into social housing, most of them within-tenure moves.

Sources and notes

- English Housing Survey, 2009/10 to 2011/12

6.3. The most common reasons given by households moving house in London are to move to a better area, to a larger home or for job related reasons

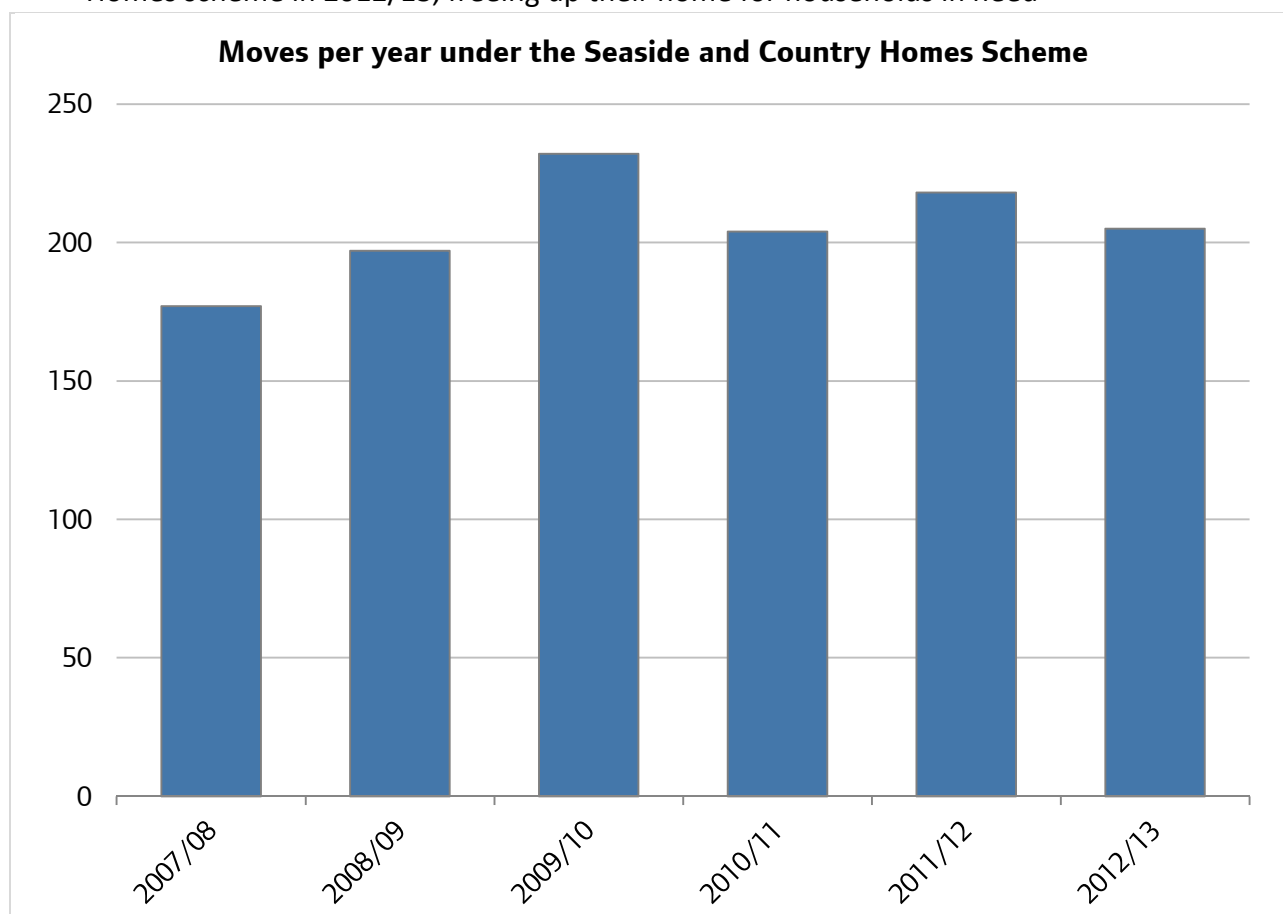


- Households in London who moved in the last two years give a wide range of reasons for moving (and some give more than one), but the most common are to move to a larger house or flat (22% of all moves), to a better neighbourhood/area (20%) or for job related reasons (14%).
- Other common reasons include wanting to live independently (unsurprisingly a major factor for newly forming households), wanting to buy, and a range of family-related reasons including marriage and divorce.
- 7% of recent movers (most of them formerly private tenants) left their previous home because the landlord asked them to, 5% because they wanted something cheaper and 2% because they couldn't afford the mortgage or rent payments.

Sources and notes

- English Housing Survey, average of 2009/10 to 2011/12
- The tenure breakdown refers to the previous tenure of the household, not the current tenure

6.4. Just over 200 social housing tenants moved out of London through the Seaside and Country Homes scheme in 2012/13, freeing up their home for households in need

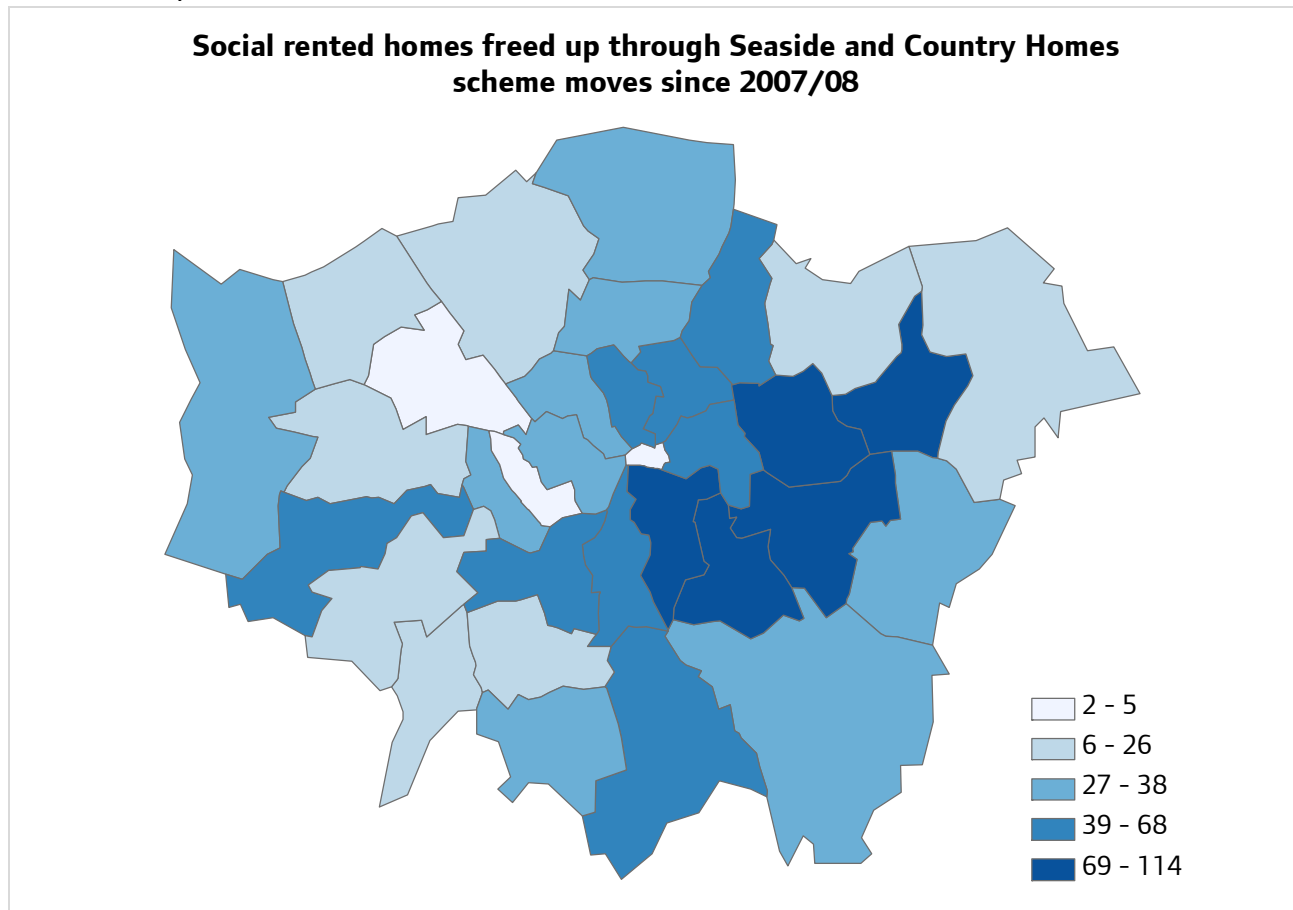


- The Seaside and County Homes scheme offers older London social housing tenants the opportunity to move to suitable accommodation in other regions. Tenants who are currently under-occupying their homes are given priority in the scheme in order to free up family sized homes to address overcrowding.
- Over the last five years around 200 tenants a year have taken advantage of the scheme to move out, with 205 moving in 2012/13.

Sources and notes

- GLA, Seaside & Country Homes programme monitoring data

- 6.5. Over a thousand social rented homes in London have been freed up through the Seaside and Country Homes scheme since 2007/08

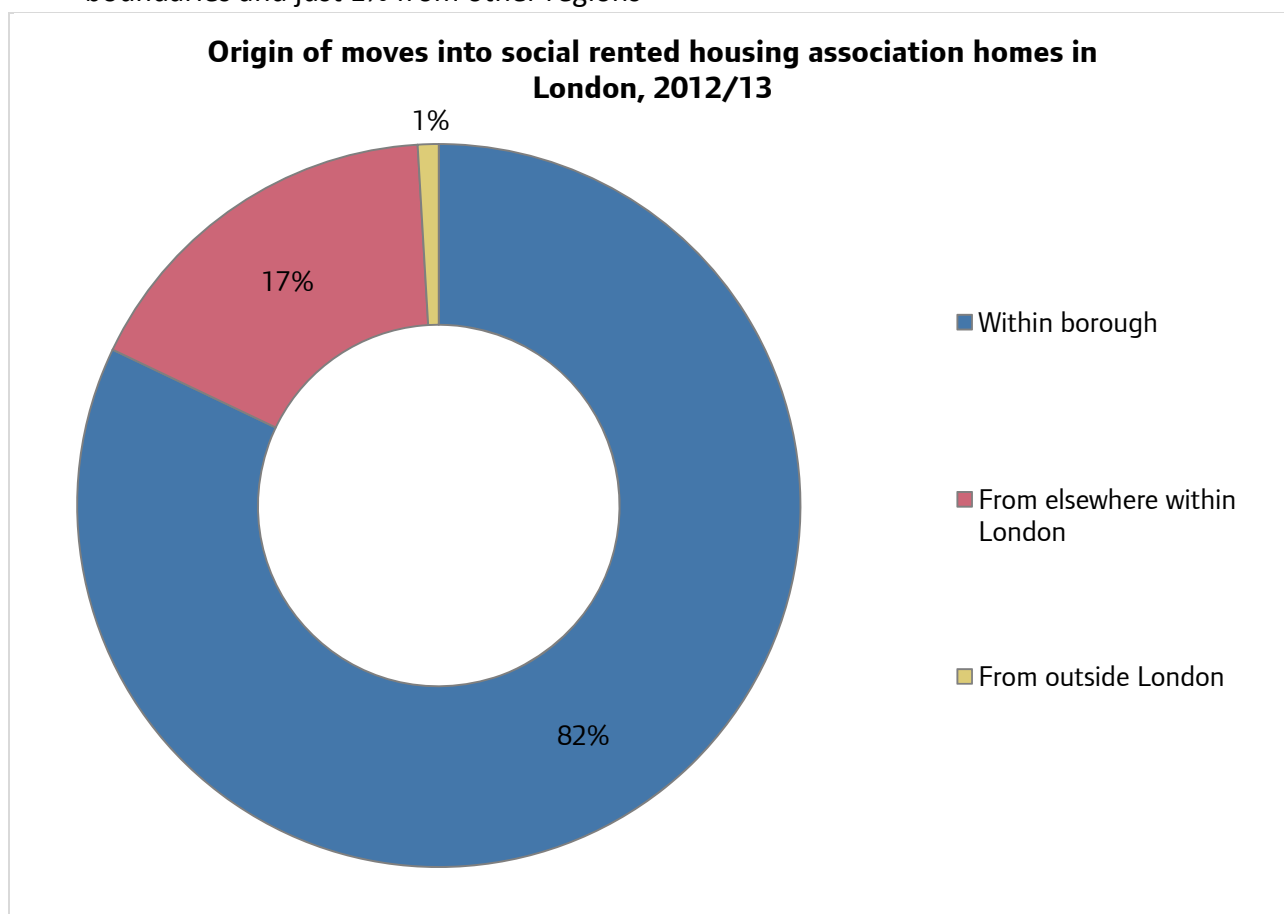


- Between 2007/08 and 2012/13 1,334 social rented homes in London were freed up in London after the tenants moved out through the Seaside & Country Homes scheme.
- The most homes were freed up in Greenwich (114), followed by Southwark (98) and Barking and Dagenham (88), and the least were in the City of London (two), Brent (three) and Kensington and Chelsea (five).
- 45% of the homes freed up in 2012/13 had three bedrooms or more.

Sources and notes

- GLA, Seaside & Country Homes programme monitoring data

- 6.6. Most moves into social housing in London are local, with 17% moving across borough boundaries and just 1% from other regions

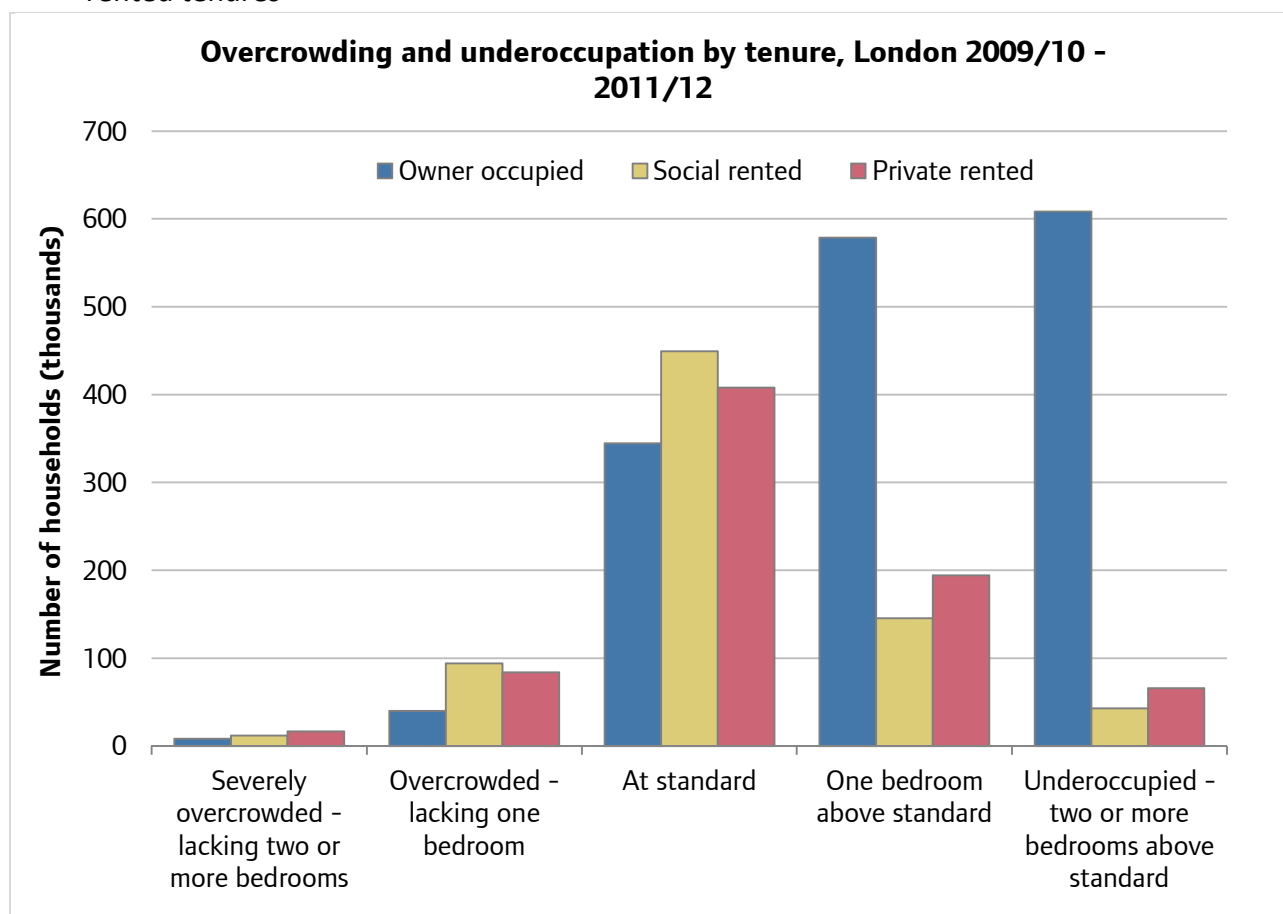


- Of the 13,960 households recorded as moving into social rented housing association homes in London in 2012/13, the great majority (82%) came from within the same London borough as their new home, while 17% came from elsewhere in London and just one per cent from outside London.
- These proportions have stayed very similar for several years, indicating no strong increase or decrease in cross-borough mobility.

Sources and notes

- CORE general needs lettings data 2012/13

6.7. Under-occupation rates are far higher in owner occupied housing than in either of the rented tenures

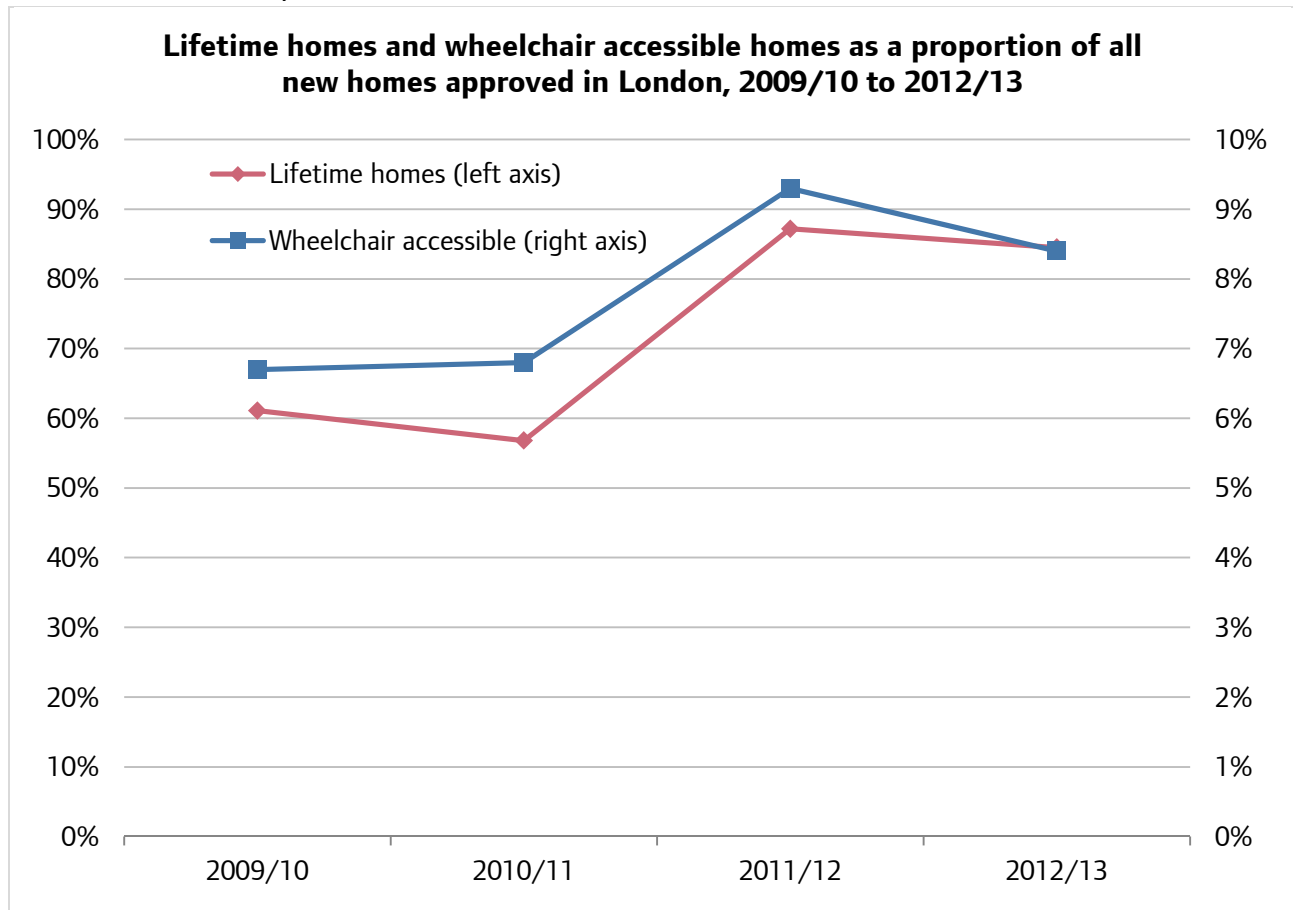


- Under-occupied households are those with two or more bedrooms more than they require according to the bedroom standard (though this does not automatically mean that the bedrooms are unused).
- There are around 720,000 under-occupied households in London, 23 per cent of all households in the capital. Around 85 per cent of these are owner occupiers, nine per cent are private renters and six per cent are in social housing.
- Social renting households have the lowest rate of under-occupation at six per cent, compared to nine per cent of private tenants and 38 per cent of owner occupying households.

Sources and notes

- *English Housing Survey, 2009/10 to 2011/12*

6.8. The number of 'lifetime homes' and wheelchair accessible homes approved in London has risen in recent years

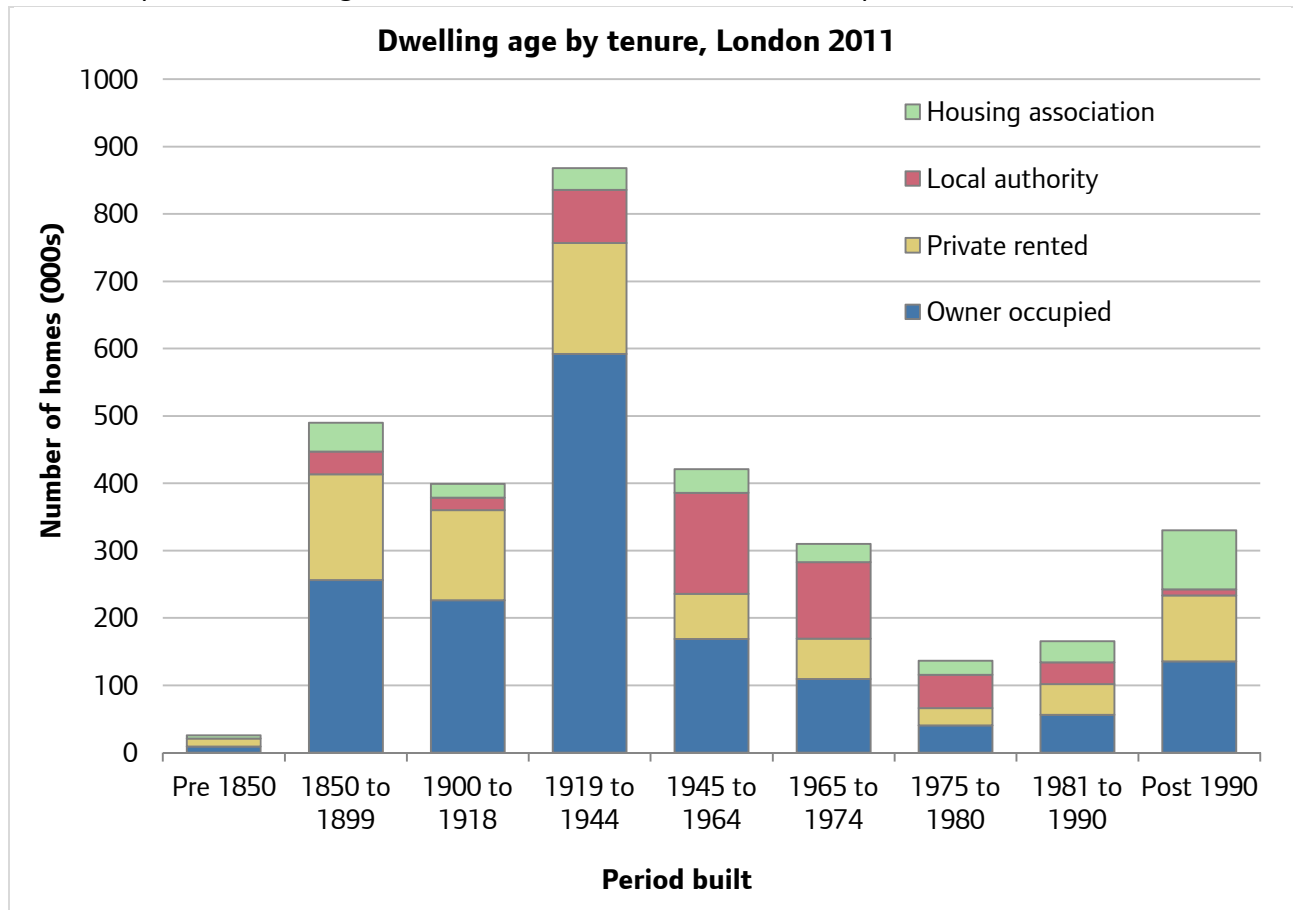


- The Lifetime Homes Standard is a series of design criteria intended to make homes more easily adaptable as people grow older. The London Plan states that all new homes in London should be built to the Lifetime Homes Standard, while ten per cent of new homes should be wheelchair accessible or easily adaptable for residents who are wheelchair users.
- In 2012/13 84% of new homes approved in London were built to the Lifetime Homes Standard and 8.4% were wheelchair accessible. Both these figures were down slightly from 2011/12 but significantly higher than the levels seen in 2009/10 and 2010/11.
- These figures include not just new build but also conversions and changes of use, which can be very challenging to carry out to Lifetime Homes or wheelchair accessibility standards.

Sources and notes

- GLA, London Plan Annual Monitoring Report

6.9. Most pre-World War II homes in London are in the market sector, while affordable homes comprise a much higher share of those built in the first few post-war decades

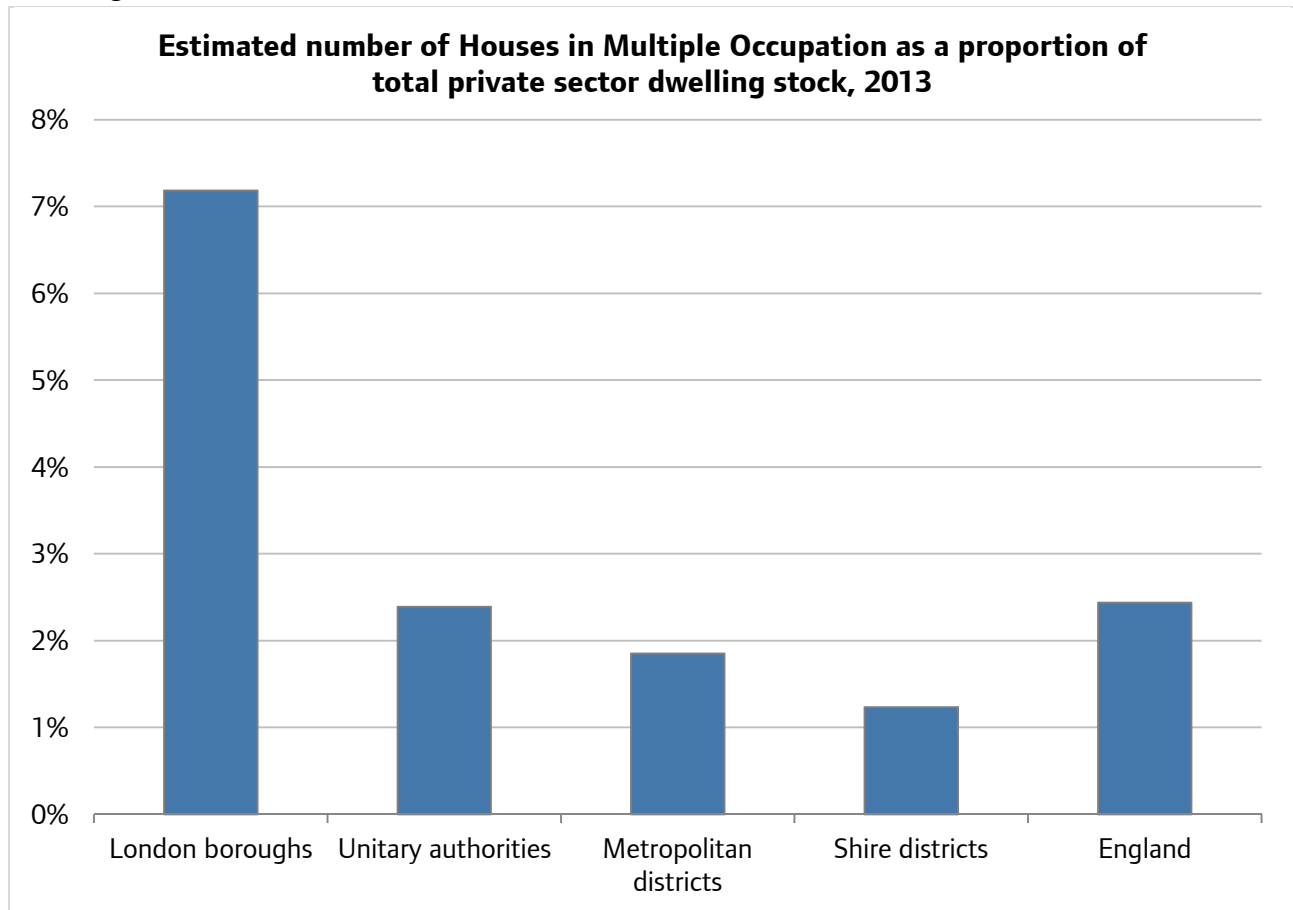


- Around 57% of London's homes were built before the Second World War, and the homes that survive from this period are now predominantly owner occupied or private rented.
- Just over half of all local authority homes were built in the three decades following the Second World War, but local authority building fell away rapidly in the 1980s and 1990s, replaced in part by housing association development.
- Of the homes built since 1990, around 41% are owner occupied, 30% private rented and 29% social rented.
- The median owner occupied or private rented home in London was built in the mid 1930s, the median council home in the early 1960s and the median housing association home in 1970.

Sources and notes

- English Housing Survey stock data, 2011
- This chart shows the current tenure of homes in London, not their tenure when first built. A large number of homes initially built as council housing have been transferred to the private sector (through the Right to Buy) or to housing association ownership (through stock transfers), while many private rented homes were initially owner occupied and vice versa.

6.10. Homes in Multiple Occupation comprise 7% of London's private housing stock, a much higher rate than in other areas

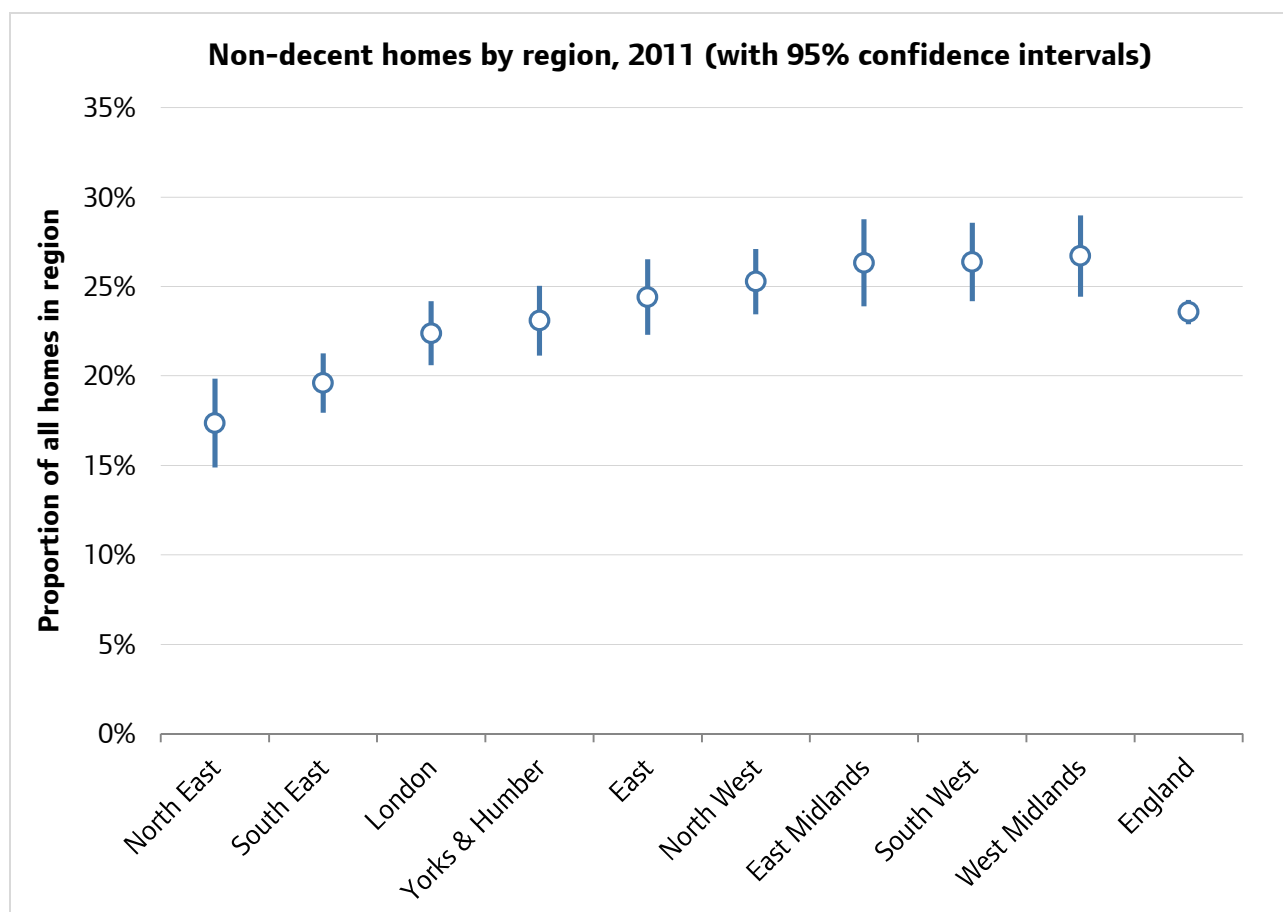


- A house in multiple occupation (HMO) is a property rented out by at least three people who are not from the same household, but who do share facilities such as a bathroom or kitchen.
- HMOs must be licensed by local authorities if they are rented to five or more people from more than one household and are at least three storeys high.
- London boroughs estimate that there are 184,880 HMOs in London, equivalent to 7.2% of the total private sector stock - a far higher share than in the rest of the country.
- Of the estimated 184,880 HMOs in London, 5,640 have been issued mandatory licenses by London boroughs and 1,360 of these have been found upon inspection to have Category 1 hazards under the Housing Health and Safety Rating System.

Sources and notes

- DCLG, *Local Authority Housing Statistics, 2013*

6.11. Around 22% of homes in London are below the official Decent Homes standard

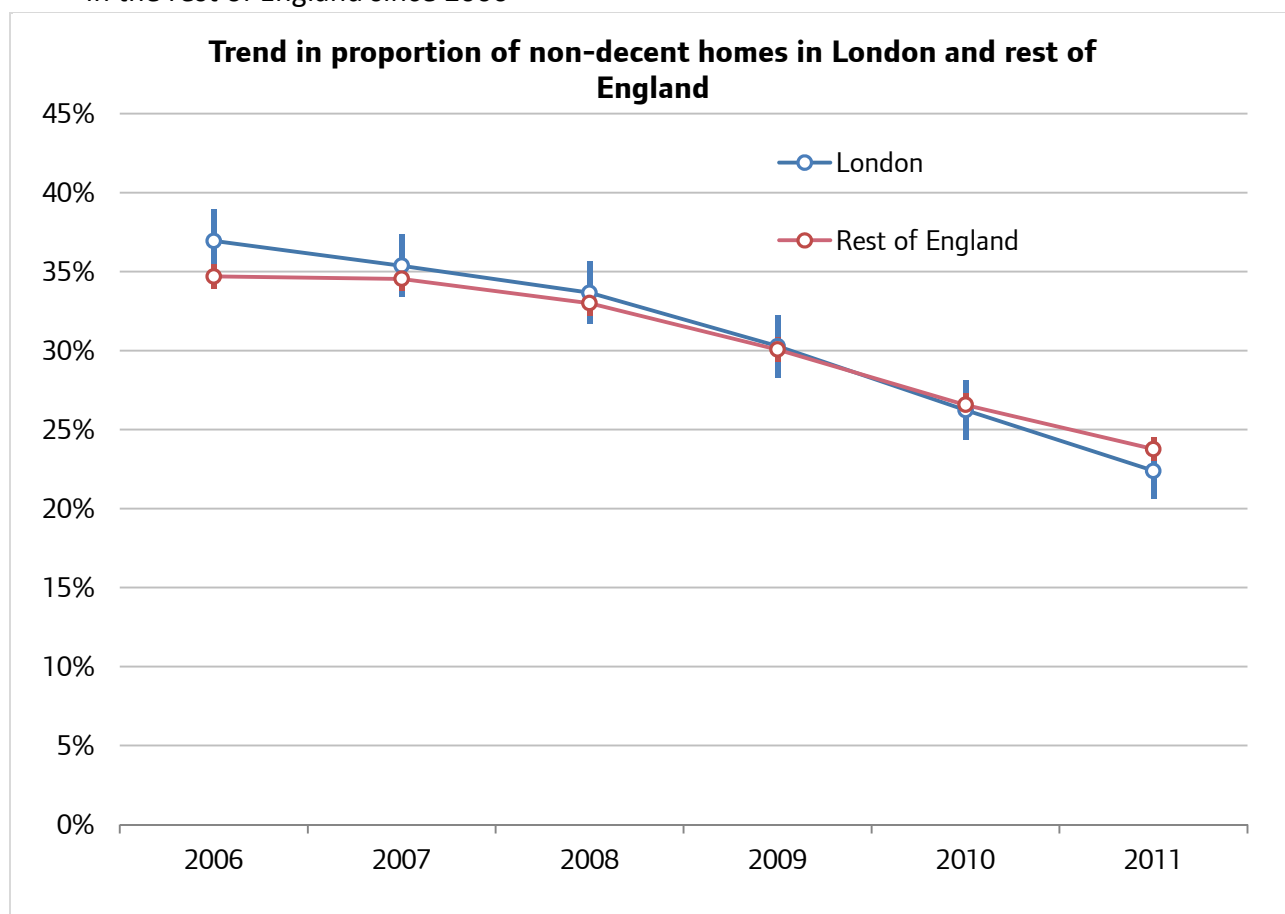


- Around 22% of homes in London are below the official Decent Homes standard, a composite measure of dwelling stock conditions that takes into account minimum standards, thermal comfort, kitchen and bathroom facilities and the general state of repair. London's 'non-decency' rate is close to the national average of 24%, and not significantly different from most other regions.
- The lowest proportion of non-decent homes at regional level is in the North East around 17%, and the highest rate in the West Midlands (around 27%).

Sources and notes

- *English Housing Survey stock data, 2011*

6.12. The proportion of homes below the Decent Homes standard has fallen faster in London than in the rest of England since 2006

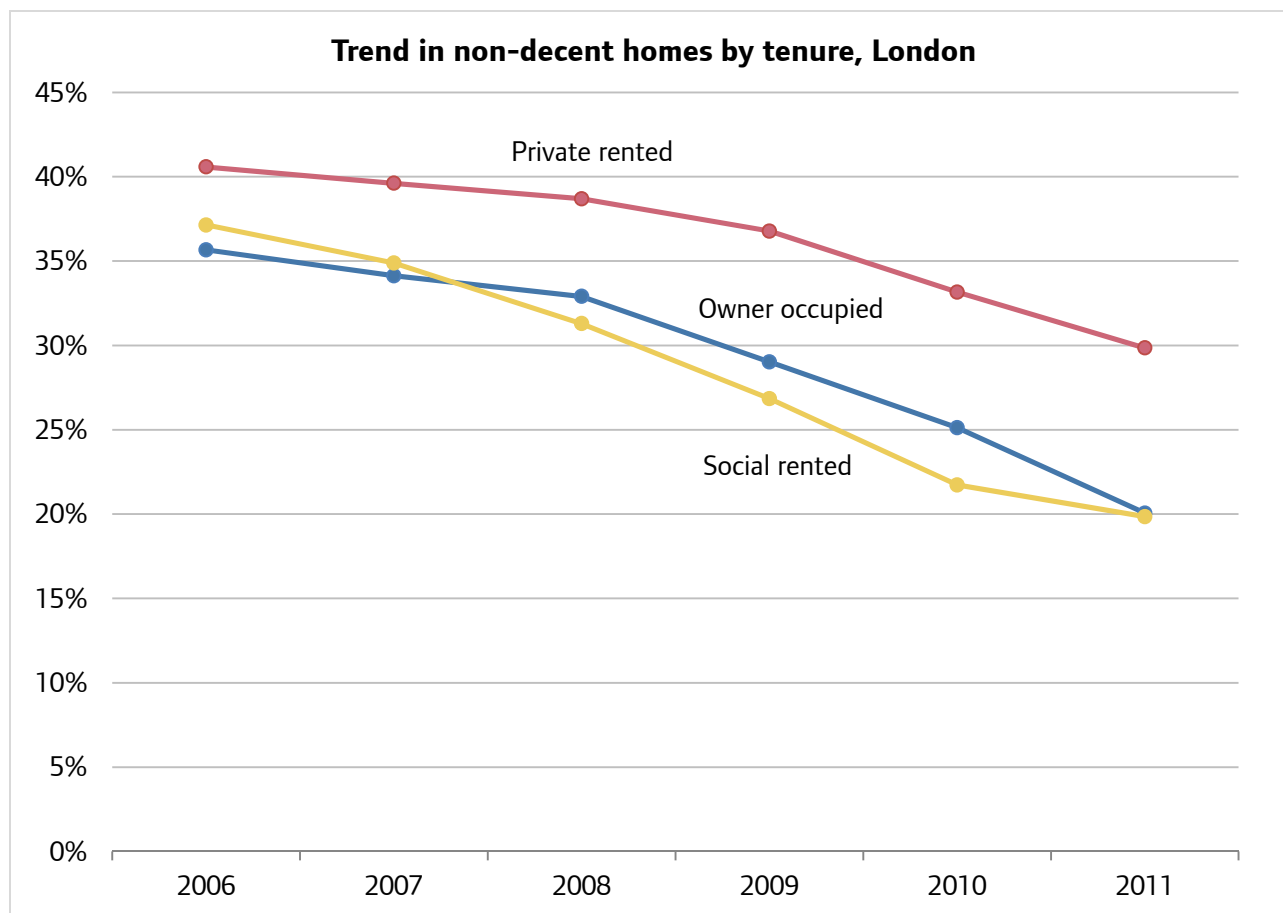


- The proportion of homes in London that fail to meet the Decent Homes standard has fallen by around a third in five years, from 37% in 2006 to 22% in 2011
- The rate of improvement has been notably faster in London than in the rest of England, where the proportion of non-decent homes fell from 35% in 2006 to 24% in 2011.

Sources and notes

- Survey of English Housing data 2006 to 2007, English Housing Survey stock data 2008 to 2011

6.13. The proportion of non-decent homes has fallen rapidly in each tenure in recent years



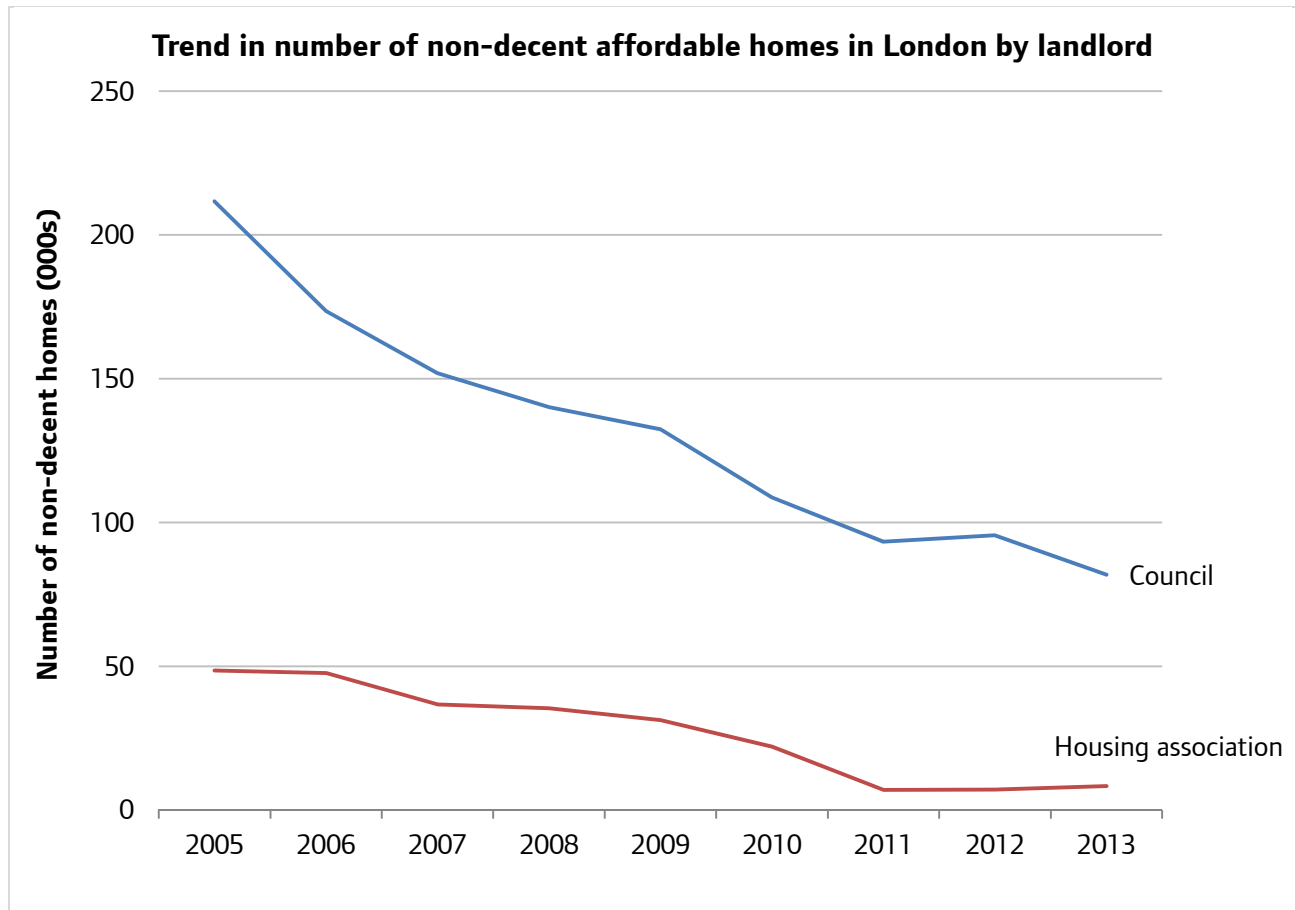
- 30% of private rented homes in London are below the Decent Homes standard, compared to 20% of owner occupied and 20% of social rented homes.
- The proportion of homes below the standard has fallen significantly in each tenure since 2006 – from 41% for privately rented homes, 37% for social rented homes and 36% for owner occupied homes.
- The proportion of non-decent social rented homes fell particularly quickly towards the start of this period, while the proportion of market homes below the standard has fallen more quickly in the last two years.

Sources and notes

- Survey of English Housing data 2006 to 2007, English Housing Survey stock data 2008 to 2011

- Confidence intervals are not shown for reasons of legibility, but throughout the period shown are approximately 3% for both owner occupied and social rented housing, while falling from 5% to 4% for private renting (reflecting the growth of the tenure in recent years)

6.14. The number of affordable homes in London below the Decent Homes standard has fallen from 260,300 in 2005 to 90,200 in 2013

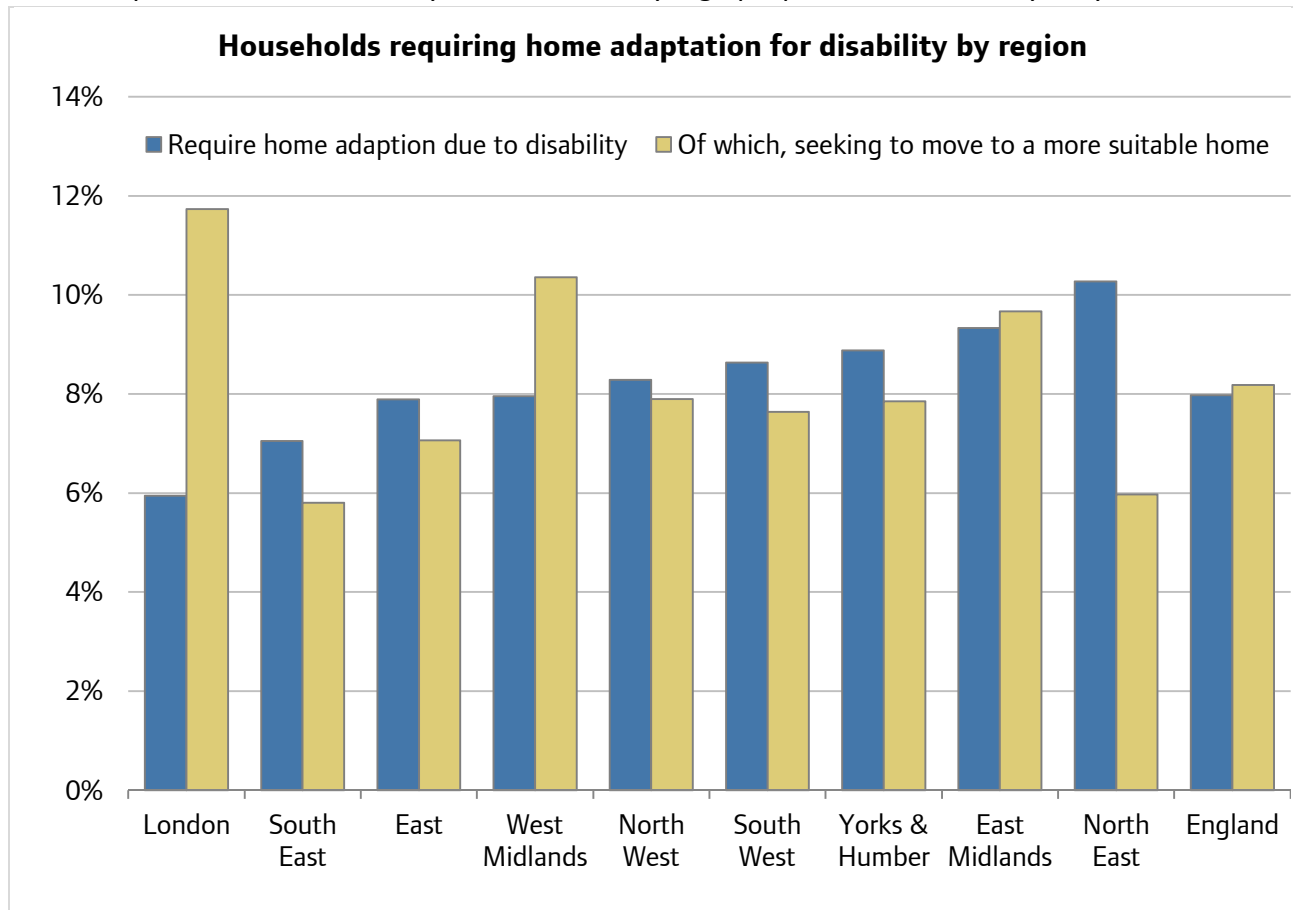


- In April 2013 there were 90,200 council or housing association owned homes in London below the Decent Homes standard, down from 102,600 in 2012 and 260,300 in 2005 (the first year when data was available for both tenures).
- Since 2005 the number of non-decent housing association homes has fallen from 48,500 to 8,300, while the number of non-decent council homes has fallen from 211,800 to 81,800.

Sources and notes

- DCLG Business Plan Statistical Appendix and Local Authority Housing Statistics data for council homes, Tenant Services Authority Regulatory Statistical Return and Homes and Communities Agency Statistical Data Return for housing associations.

6.15. London has a relatively low proportion of households who say they require a home adaptation due to disability – but a relatively high proportion of these say they need to move

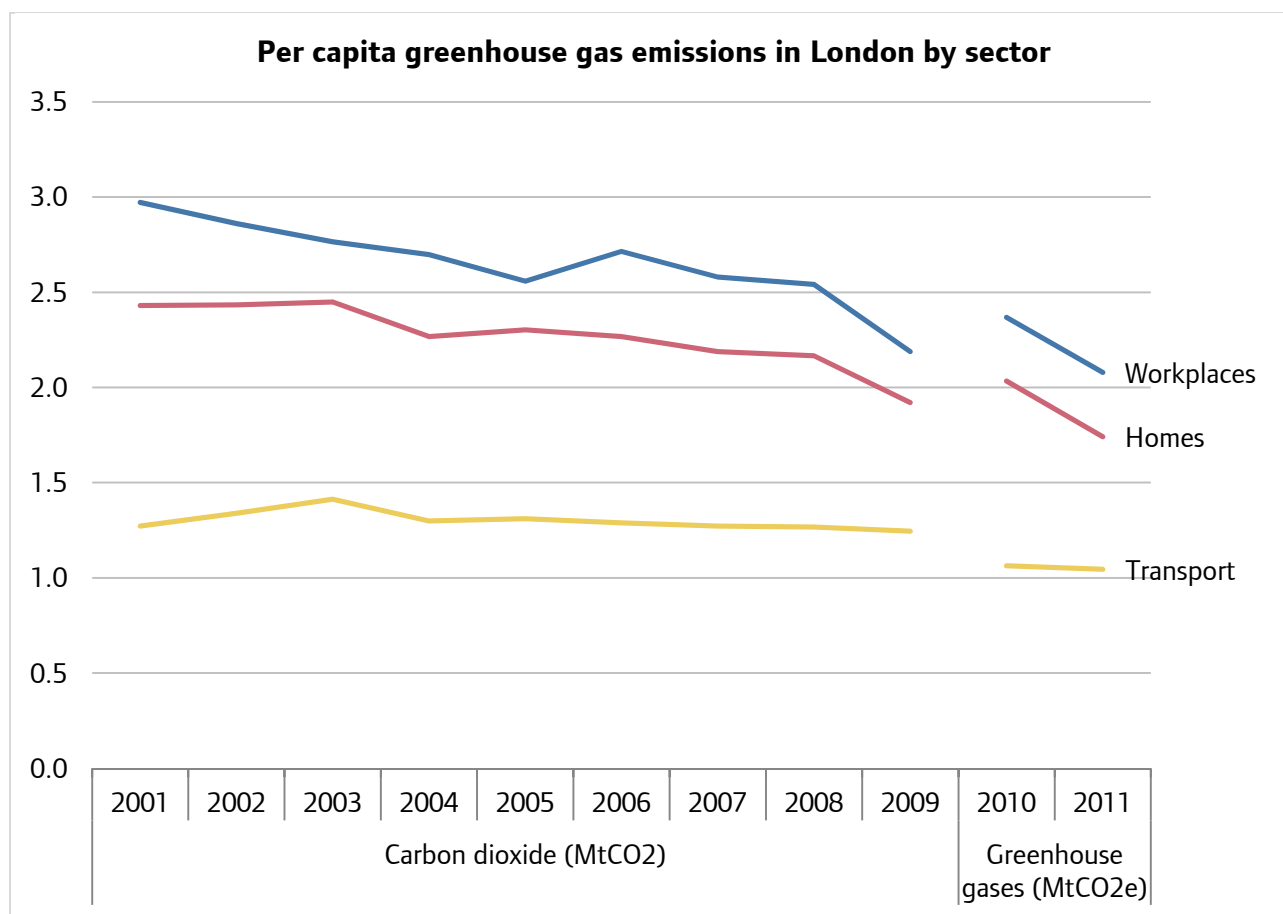


- Around 180,000 households, 6% of all households in London, say the illness or disability of one or more household members requires adaptation(s) to the home. This is a relatively low proportion and compares with a figure of 8% in England as a whole.
- However, a relatively high proportion of those who require a home adaptation in London are looking to move to more suitable accommodation. Around 20,000 households say they are currently attempting to move, equivalent to 12% of those who require a home adaptation, compared to 8% at the national level.

Sources and notes

- English Housing Survey, 2008/09 to 2010/11

6.16. Per capita greenhouse gas emissions from London's housing stock have fallen in recent years

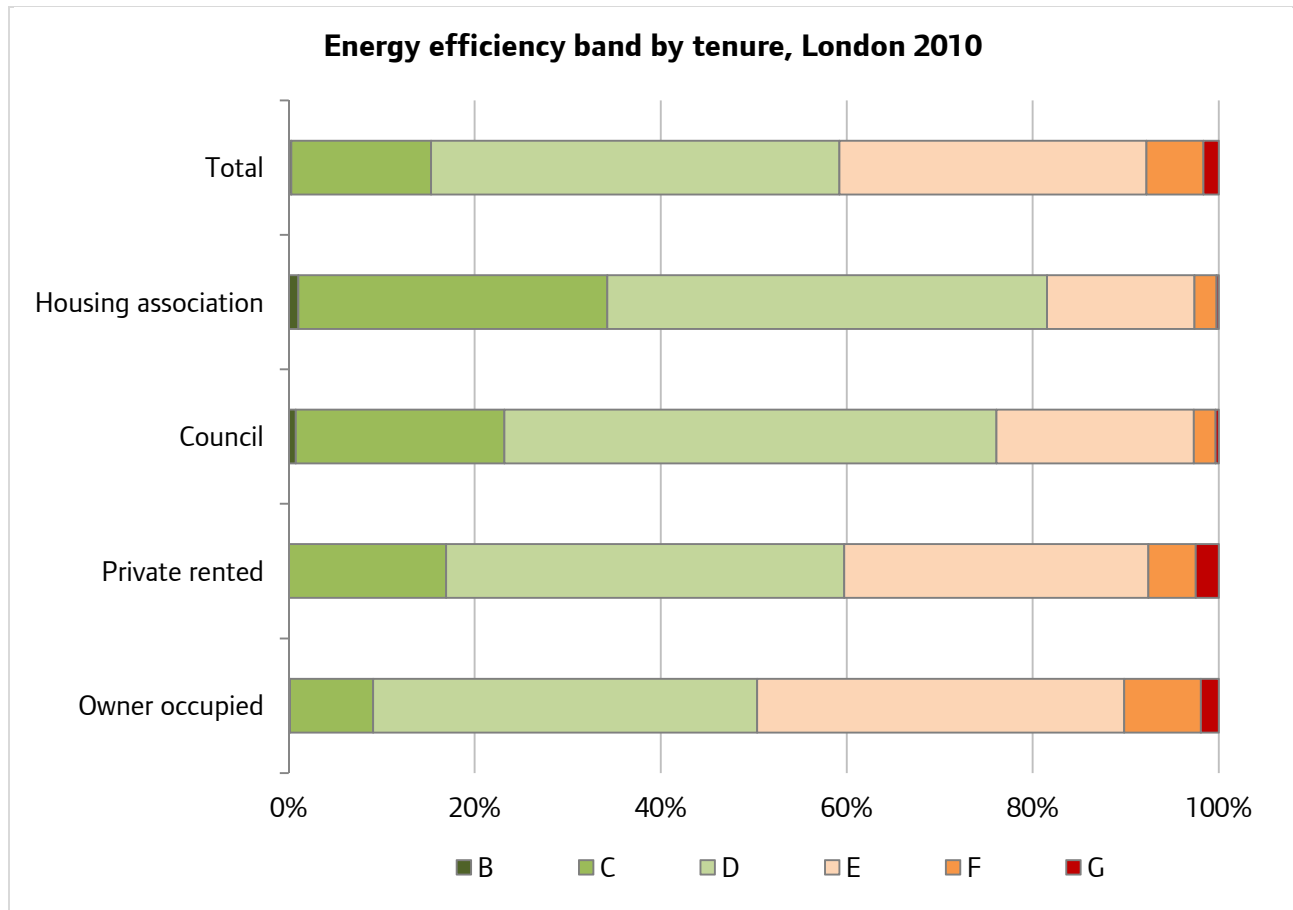


- The GLA's London Energy and Greenhouse Gas Inventory (LEGGI) measures greenhouse gas emissions from London's workplaces, homes and transport, with emissions prior to 2009 measured in megatons of carbon dioxide and from 2010 onwards in megatons of carbon dioxide equivalent.
- Per capita emissions of greenhouse gases from London's housing were 1.7 megatons in 2011, down from 2.03 in 2010. Emissions from workplaces also fell, to 2.1 megatons per head of population, while transport emissions were relatively flat at just over one megaton per person.

Sources and notes

- GLA, *London Energy and Greenhouse Gas Inventory*

6.17. On average, private sector homes in London are significantly less energy efficient than affordable homes

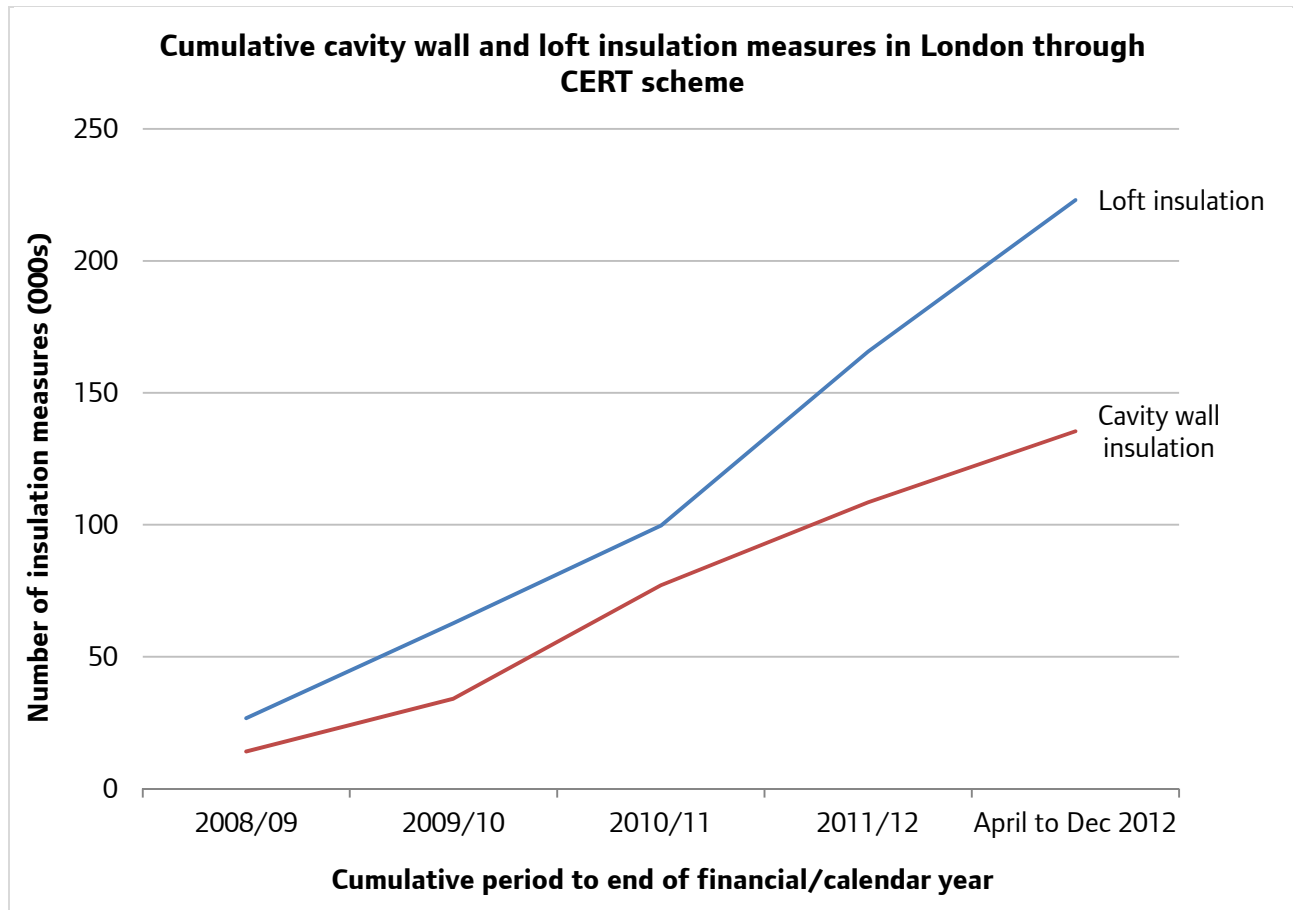


- The energy efficiency of housing is measured by the Standard Assessment Procedure (SAP) according to a banding system in which A-band homes are the most energy efficient.
- In 2010 around 40% of homes in London were in bands E to G, but this proportion varied widely by tenure, from around 20% of housing association homes to around half of owner occupied homes.
- At the other end of the scale, around a third of housing association homes were in bands B to C compared to around 10% of owner occupied homes. Housing association homes are newer on average and more likely to be flats, while owner occupied homes tend to be older and are more likely to be detached or semi-detached homes, which are usually less energy efficient.

Sources and notes

- *English Housing Survey, 2010 housing stock data*

6.18. Almost 330,000 in London received loft or cavity wall insulation under the CERT scheme

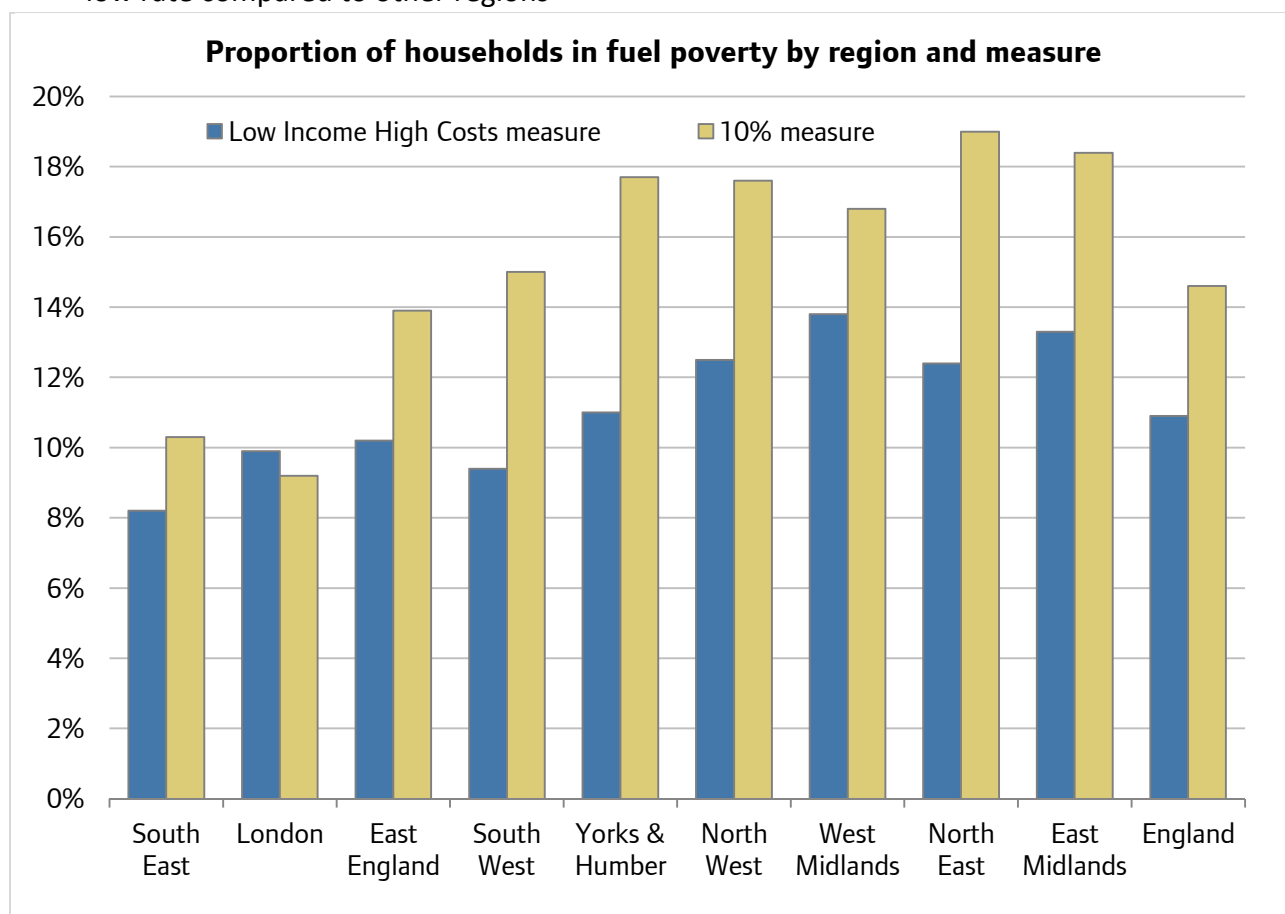


- The Carbon Emissions Reductions Target (CERT) scheme ran from 2008 to 2012, and required large gas and electricity suppliers to achieve targets for reducing carbon emissions from domestic properties through various means including installing loft and cavity wall insulation measures.
- Between April 2008 and December 2012 there were 223,100 loft insulation and 135,400 cavity wall insulation measures installed in London homes, for a total of 358,500.
- As some homes received both measures, the number of homes benefitting was 327,900, or 10% of London's total housing stock.
- The CERT scheme ended in December 2012 and was replaced by the Green Deal and the Energy Company Obligation. The Mayor's RE:NEW programme aims to maximise take-up from these and other schemes in London.

Sources and notes

- Energy Saving Trust, Home Energy Efficiency Database – CERT summary report

6.19. Around a tenth of London households are estimated to be living in fuel poverty, a relatively low rate compared to other regions



- The government's Low Income High Costs measure defines a household as living in fuel poverty if they have required fuel costs above the national average and would be below the official poverty line if they were to spend that amount.
- According to this definition, 10% of households in London are fuel poor, compared to 11% in England as a whole.
- Under an alternative measure, according to which a household is said to be in fuel poverty if it needs to spend more than 10% of its income on fuel to maintain a satisfactory heating regime, 9% of households in London are fuel poor compared to 15% nationally.

Sources and notes

- Department of Energy and Climate Change, Fuel poverty statistics

7 Appendices

- 7.1 Key demographic statistics for London boroughs
- 7.2 Map of Inner and Outer London boroughs

Table 7.1: London boroughs - key demographic statistics

		2001	2011				
Borough	Sector	Population	Population	Households	Average hhold size	Area (hectares)	Population / hectare
City of London	Inner	7,400	7,400	4,400	1.64	290	25
Barking and Dagenham	Outer	165,700	187,400	70,100	2.66	3,611	52
Barnet	Outer	319,500	357,700	136,300	2.59	8,675	41
Bexley	Outer	218,800	233,000	92,900	2.50	6,058	38
Brent	Outer	269,600	313,100	110,700	2.81	4,323	72
Bromley	Outer	296,200	311,100	131,400	2.35	15,013	21
Camden	Inner	202,600	220,100	97,500	2.18	2,179	101
Croydon	Outer	335,100	364,800	145,600	2.48	8,650	42
Ealing	Outer	307,300	339,700	124,400	2.70	5,554	61
Enfield	Outer	277,300	314,000	120,500	2.59	8,083	39
Greenwich	Outer	217,500	255,500	101,400	2.47	4,733	54
Hackney	Inner	207,200	247,600	102,100	2.41	1,905	130
Hammersmith and Fulham	Inner	169,400	182,800	80,600	2.25	1,640	111
Haringey	Inner	221,300	256,400	102,200	2.49	2,960	87
Harrow	Outer	210,000	241,100	84,800	2.82	5,046	48
Havering	Outer	224,700	238,300	97,500	2.43	11,235	21
Hillingdon	Outer	245,600	276,100	100,800	2.67	11,570	24
Hounslow	Outer	216,000	255,300	95,300	2.66	5,598	46
Islington	Inner	179,400	206,600	93,700	2.14	1,486	139
Kensington and Chelsea	Inner	162,200	158,700	78,400	1.99	1,212	131
Kingston upon Thames	Outer	149,000	160,500	63,800	2.46	3,726	43
Lambeth	Inner	273,400	304,800	130,600	2.31	2,681	114
Lewisham	Inner	254,300	277,500	116,500	2.36	3,515	79
Merton	Outer	191,100	201,200	79,100	2.53	3,762	53
Newham	Inner	249,400	311,900	102,300	3.03	3,620	86
Redbridge	Outer	241,900	281,500	100,000	2.80	5,642	50
Richmond upon Thames	Outer	174,300	187,500	80,100	2.31	5,741	33
Southwark	Inner	256,700	289,400	120,700	2.35	2,886	100
Sutton	Outer	181,500	191,500	78,600	2.42	4,385	44
Tower Hamlets	Inner	201,100	256,700	102,100	2.48	1,978	130
Waltham Forest	Outer	222,000	260,400	97,400	2.66	3,881	67
Wandsworth	Inner	271,700	308,300	130,800	2.32	3,426	90
Westminster	Inner	203,300	219,600	105,900	2.02	2,149	102
London		7,322,400	8,217,500	3,278,300	2.48	157,215	52

The London Boroughs



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Hindi

यदि आप इस दस्तावेज की प्रति अपनी
भाषा में चाहते हैं, तो कृपया निम्नलिखित
नंबर पर फोन करें अथवा नीचे दिये गये
पते पर संपर्क करें

Vietnamese

Nếu bạn muốn có văn bản tài liệu
này bằng ngôn ngữ của mình, hãy
liên hệ theo số điện thoại hoặc địa
chỉ dưới đây.

Bengali

আপনি যদি আপনার ভাষায় এই দলিলের প্রতিলিপি
(কপি) চান, তা হলে নিচের ফোন নম্বরে
বা ঠিকানায় অনুগ্রহ করে যোগাযোগ করুন।

Greek

Αν θέλετε να αποκτήσετε αντίγραφο του παρόντος
εγγράφου στη δική σας γλώσσα, παρακαλείστε να
επικοινωνήσετε τηλεφωνικά στον αριθμό αυτό ή ταχυ-
δρομικά στην παρακάτω διεύθυνση.

Urdu

اگر آپ اس دستاویز کی نقل اپنی زبان میں
چاہتے ہیں، تو براہ کرم نیچے دئے گئے نمبر
پر فون کریں یا دیئے گئے پتے پر رابطہ کریں

Turkish

Bu belgenin kendi dilinizde
hazırlanmış bir nüshasını
edinmek için, lütfen aşağıdaki
telefon numarasını arayınız
veya adrese başvurunuz.

Arabic

إذا أردت نسخة من هذه الوثيقة بلغتك، يرجى
الاتصال برقم الهاتف أو مراسلة العنوان
أدناه

Punjabi

ਜੇ ਤੁਹਾਨੂੰ ਇਸ ਦਸਤਾਵੇਜ਼ ਦੀ ਕਾਪੀ ਤੁਹਾਡੀ ਆਪਣੀ ਭਾਸ਼ਾ
ਵਿਚ ਚਾਹੀਦੀ ਹੈ, ਤਾਂ ਹੇਠ ਲਿਖੇ ਨੰਬਰ 'ਤੇ ਫ਼ੋਨ ਕਰੋ ਜਾਂ ਹੇਠ
ਲਿਖੇ ਪਤੇ 'ਤੇ ਰਾਬਤ ਕਰੋ:

Gujarati

જો તમને આ દસ્તાવેજની નકલ તમારી ભાષામાં
જોઈતી હોય તો, કૃપા કરી આપેલ નંબર ઉપર
ફોન કરો અથવા નીચેના સરનામે સંપર્ક સાધો.

