# Contents

Contents | 3  
--- | ---  
Introduction | 4  
List of charts | 5  
London Housing Strategy monitoring | 10  
Key statistics for London Boroughs | 12  
1. Demographic, economic and housing context | 16  
2. Housing stock and supply | 33  
3. Housing costs and affordability | 55  
4. Housing needs | 73  
5. Mobility and decent homes | 84  
6. The impacts of Coronavirus | 100  
Appendices | 117  
A1. Discontinued charts | 118  
A2. Glossary of acronyms | 120  
A3. Sources of data on housing supply | 121
Introduction

Housing in London is the evidence base for the Mayor’s London Housing Strategy, and also informs housing policies in the London Plan. It summarises key patterns and trends across a range of topics relevant to housing in the capital, and is divided into nine sections, including six core thematic chapters:

- London Housing Strategy monitoring
- Key statistics for London boroughs
  1. Demographic, economic and housing context
  2. Housing stock and supply
  3. Housing costs and affordability
  4. Housing needs, including homelessness and overcrowding
  5. Mobility and decent homes
  6. The impacts of Coronavirus

Appendices

The data in chapters 1 to 5 generally describes the situation before the onset of the Coronavirus pandemic in March 2020, while chapter 6 brings together a range of more recent data to illustrate both the impact of the pandemic and aspects of the housing policy response.

This document sits alongside a range of other Greater London Authority (GLA) publications 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 2017 London Strategic Housing Market Assessment
- The 2017 London Strategic Housing Land Availability Assessment
- The 2018 London Housing Strategy
- The Mayor’s Annual Equality Reports
- The London Datastore, including statistics on housing and demographics

Where available to share, the data used to produce this report has been uploaded to the London Datastore.

Some charts included in previous versions of Housing in London have been discontinued for this edition, usually due to a lack of new data. A list of discontinued charts is provided at Appendix A1. Previous editions of Housing in London can be found at https://data.london.gov.uk/dataset/housing-london.

Comments and suggestions are welcomed and should be sent to housinganalysis@london.gov.uk.
List of charts

Housing in London 2020 is structured around six thematic chapters, with tables of key London borough statistics at the beginning of the document. Each thematic chapter starts with a summary page, with links to every chart provided.

This chart list contains hyperlinks to the relevant section of the document.

Chapter 1: Demographic, economic and housing context

1.1 Historic and projected London population, 1801 to 2041
1.2 Indexed trend in number of jobs, people and homes in London, 1997 to 2019
1.3 Net domestic migration to London by age group, 2002 to 2019
1.4 Proportion of households in London with dependent children by tenure, 2004 to 2020
1.5 National household income quintile by tenure, London, 2018/19
1.6 London households by national household income quintile and tenure, 1994/95 to 2018/19
1.7 Median household net property wealth of property owners by region, 2006 to 2018
1.8 Attitudes towards local housebuilding in London, 2010 to 2018
1.9 Estimated new build homes in Greater London, 1871 to 2019
1.10 Estimated number of people per dwelling in England, London and other regions, 1971 to 2019
1.11 Annual trend in household tenure, London, 1981 to 2019
1.12 Home ownership rate by age group of household head, London 1990 to 2019
1.13 Trend in mix of buyers of new market homes in London, 2006 to 2019
1.14 Average floor area (square metres per person) in London by tenure, 1996 to 2018
1.15 Average density of dwellings per hectare of residential land by local authority, London and rest of England, 2018
1.16 Satisfaction with accommodation and tenure, London, 2017/18

Chapter 2: Housing stock and supply

2.1 Net conventional completions by tenure, London, 2004/05 to 2018/19
2.2 New housing completions: comparison of various housebuilding datasets, London, 2010 to 2020
2.3 Net conventional completions by borough and tenure, London, 2016/17 to 2018/19
2.4 Family sized homes (three bedrooms or more) as a proportion of total gross house building in London, 1991/92 to 2018/19
2.5 Trend in net conventional housing approvals in London by tenure, 2004/05 to 2018/19
2.6 Affordable and market homes on referable planning applications recommended for approval by the Mayor, 2012 to 2019

2.7 Homes approved on small schemes (1 to 9 homes) by development type, London, 2012/13 to 2018/19

2.8 Trend in applications, permissions, starts and completions of tall buildings in London, 2001 to 2019

2.9 Cumulative Build to Rent starts and completions in London, 2009 to 2019

2.10 Map showing Sites on the 'Small Sites Small Builders' portal, by current status and affordable housing restriction (if any), as at June 2020

2.11 Affordable housing starts in London funded by the GLA, 2012/13 to 2019/20

2.12 Number of council homes started by London boroughs, 1980/81 to 2019/20

2.13 Affordable housing completions in London, 1991/92 to 2018/19

2.14 Estimated housing construction costs per square metre in London, English regions and other world cities, 2018 (in PPP-adjusted GBP)

2.15 Housing scheme design audit ratings by region, 2014 to 2019

2.16 Accessible homes as a proportion of all new build homes approved in London, 2009/10 to 2018/19

2.17 Concentrations of new home completions in London by tenure, 2012/13 to 2018/19

2.18 Annual Right to Buy council housing sales and average discount, London, 1980/81 to 2019/20

2.19 Affordable homes in London (excluding shared ownership) by landlord, 1997 to 2019

2.20 Empty homes in London as a proportion of total stock, 1978 to 2019

2.21 Number of mandatory licensed Homes in Multiple Occupation in London, 2012 to 2019

Chapter 3: Housing costs and affordability

3.1 Median of housing costs as a percentage of gross household income (including benefits and income from all household members) by tenure, London, 2010 to 2017

3.2 Average house prices in London and England after adjusting for inflation, 1970 to 2020

3.3 Median house price by Middle Super Output Area, London, 2019

3.4 Annualised new home buyer mortgages by type, London, 2004 to 2020

3.5 Annualised number of loans to London first time buyers, by loan-to-value ratio, 2006 to 2019

3.6 Mean mortgage deposit put down by first-time buyers in London and England, 2005 to 2020

3.7 Mean loan-to-income ratio for new loans to first time buyers and home movers in London, 1980 to 2019

3.8 Annualised Help to Buy loans in Inner and Outer London, 2014 to 2019
3.10 Modelled number of sales and average Stamp Duty holiday savings by price band, London, 2019 (excluding first-time buyer relief)
3.11 Index of change in average private rents by English region, 2005 to 2020
3.12 Index of cumulative change in private rents, earnings and implied affordability in London, 2005 to 2019
3.13 Median monthly market rent by English region and number of bedrooms, April 2019 to March 2020
3.14 Lower quartile, median and upper quartile monthly rents for a two-bedroom home by London borough, April 2019 to March 2020
3.15 Trend in Housing Benefit and Universal Credit caseload in London by tenure, May 1998 to May 2020
3.16 Proportion of tenants who say that Housing Benefit covered the entire rent, London and rest of England, 2008/09 and 2018/19
3.17 Median weekly rents for new social rent and Affordable Rent lettings to two-bedroom homes in London, 2007/08 to 2018/19 (nominal)

Chapter 4: Housing needs

4.1 People seen sleeping rough in London, 2006/07 to 2019/20
4.2 Number of contacts with people seen sleeping rough for the first time in London, 2008/09 to 2019/20
4.3 Areas of origin of people seen sleeping rough in London, 2008/09 to 2019/20
4.4 Households owed a prevention or relief duty and accepted as statutorily homeless in London, Q2 2018 to Q1 2020
4.5 Households owed a homelessness duty in London, by reason for loss of last settled home, 1998/99 to 2019/2020
4.6 Homeless households placed in temporary accommodation by London boroughs by type of accommodation, 1988 to 2020
4.7 Households in London by bedrooms required and available, 2016/17 to 2018/19
4.8 Proportion of households in London overcrowded (according to the bedroom standard) by tenure, 1986/87 to 2018/19
4.9 Proportion of households with dependent children who are overcrowded by tenure, London and England, 2016/17 to 2018/19
4.10 Households in London under-occupying their accommodation (according to the bedroom standard) by tenure, 1995/96 to 2018/19
Chapter 5: Mobility and decent homes

5.1 Length of time in current home by tenure, London, 2016/17 to 2018/19
5.2 Flows between tenures of London households moving in the last year, 2016/17 to 2018/19
5.3 Lettings to new tenants in London by local authorities and housing associations, 1996/97 to 2018/19
5.4 Distance moved by people moving into private rented homes in London, 2019
5.5 Housing Moves lettings per year by category, 2012/13 to 2019/20
5.6 Social rented homes freed up through Seaside and Country Homes, moves by borough, 2007/08 to 2018/19
5.7 Trend in non-decent homes by tenure, London, 2006 to 2018
5.8 Trend in number of non-decent affordable homes in London by landlord type, 2005 to 2019
5.9 Progress of remediation on high-rise residential buildings in London identified for removal of ACM cladding systems, June 2020
5.10 Per capita greenhouse gas emissions in London by sector, 2000 to 2017
5.11 Median energy efficiency rating of housing stock by ward, London, 2019
5.12 Energy efficiency band of EPCs lodged for existing buildings and new dwellings, London, 2019/20
5.13 Trend in median SAP (energy efficiency) rating by tenure, London, 1996 to 2018
5.14 Proportion of households in fuel poverty in London and England, 2003 to 2018
5.15 Fuel poverty rates by tenure or landlord, England and London, 2018

Chapter 6: The impacts of Coronavirus

6.1 Ratio of prevalence of various housing problems to the London average, by ethnicity of household head, 2015 to 2017
6.2 Employed households in London without enough financial assets to cover a 20% loss in income for one, two or three months, by tenure, 2016 to 2018
6.3 Access to parks and private outside space by local authority, London and England, 2020
6.4 Number of rental and sale listings in London added to Rightmove portal fortnightly, March to August 2020
6.5 Monthly indicators of sales market demand and supply, as reported by RICS survey respondents, England and Wales and London, 2018 to 2020
6.6 Quarterly change in private rent indicators, London, 2015 to 2020
6.7 Number of properties listed on Airbnb in London with a review in the previous month, April 2018 to August 2020
6.8 Number of homes in planning applications for schemes in London with 20+ private homes, January 2017 to July 2020
6.9 Four-weekly rolling number of EPCs for new dwellings by English region, 2020
6.10 Employment type and typical means of travel to work of London’s construction workforce, 2019
6.11 Cumulative share of construction workers in London taking up furlough or self-employment income support schemes, as of end June 2020
6.12 Housing tenure of London’s key workers, 2019
6.13 Mortgage and landlord possession claims in London region courts by case type, January to June 2019 and 2020
6.14 Reported and expected rate of rent arrears in London by tenure, July 2020
6.15 Number of people seen sleeping rough in London between April and June, 2019 and 2020
6.16 Number of homeless people in emergency accommodation arranged by the GLA due to the Coronavirus pandemic, London, March to August 2020
London Housing Strategy monitoring

The London Housing Strategy (May 2018) sets out the Mayor’s policies and proposals for tackling London’s housing crisis and is centred around five key priorities:

- building homes for Londoners;
- delivering genuinely affordable homes;
- high quality homes and inclusive neighbourhoods;
- a fairer deal for private renters and leaseholders; and
- tackling homelessness and helping rough sleepers.

The London Housing Strategy: Implementation Plan (May 2018) brings together key policies, proposals and actions for implementation; Mayoral targets or milestones where these have been agreed; and headline indicators of success, which have been chosen to measure the long-term impact of the London Housing Strategy and the state of the housing market in London more generally. These indicators are reported in detail in the remainder of this publication and summarised in the table below.

The original indicator under the ‘Preventing and addressing homelessness’ outcome was the annual number of households accepted as homeless in London. However, changes as a result of the Homelessness Reduction Act mean that comparable figures are no longer collected. This indicator has therefore been replaced with the rolling four-quarter total number of households who are assessed as being owed a main duty due to being unintentionally homeless and in priority need. The first comparable data was collected in Q3 2018.

Table 1: London Housing Strategy monitoring indicators

<table>
<thead>
<tr>
<th>Outcome</th>
<th>Indicator</th>
<th>Baseline</th>
<th>Latest Indicator</th>
<th>Chart number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increasing the supply of new homes</td>
<td>Net housing supply (London Plan definition, including change in long-term empty homes)</td>
<td>38,550 in 2015/16</td>
<td>35,700 2018/19 (provisional data)</td>
<td>2.1</td>
</tr>
<tr>
<td>Increasing the stock of social housing</td>
<td>Additions to low cost rented affordable housing stock minus loss to affordable housing stock</td>
<td>786,925 in 2016¹</td>
<td>785,083 in 2019</td>
<td>2.19</td>
</tr>
</tbody>
</table>

¹ These figures differ from those presented in recent reports because they are based on a new data source that excludes a small number of non-self-contained homes that were included in previous data sources.
<table>
<thead>
<tr>
<th>Outcome</th>
<th>Indicator</th>
<th>Baseline</th>
<th>Latest Indicator</th>
<th>Chart number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Making housing more affordable</td>
<td>Housing costs as a percentage of household income</td>
<td>27% in 2015/16</td>
<td>26% in 2017/18</td>
<td>3.1</td>
</tr>
<tr>
<td>Improving the quality of housing</td>
<td>Percentage of homes at or above the Decent Homes standard</td>
<td>84% in 2015</td>
<td>85% in 2018</td>
<td>5.7</td>
</tr>
<tr>
<td>Reducing overcrowding</td>
<td>Percentage of London households that are overcrowded</td>
<td>7.5% in 2015/16</td>
<td>8.3% in 2018/19</td>
<td>4.8</td>
</tr>
<tr>
<td>Improving energy efficiency of housing</td>
<td>Median SAP rating of London’s homes</td>
<td>62 in 2015</td>
<td>65 in 2018</td>
<td>5.13</td>
</tr>
<tr>
<td>Improving the private rented sector</td>
<td>Percentage of private renting households satisfied with their tenure</td>
<td>58% in 2015/16</td>
<td>65% in 2017/18</td>
<td>1.16</td>
</tr>
<tr>
<td>Improving conditions in the private rented sector</td>
<td>Number of Homes in Multiple Occupation issued with mandatory licences by London boroughs</td>
<td>9,683 in April 2017</td>
<td>11,704 in April 2019</td>
<td>2.21</td>
</tr>
<tr>
<td>Preventing and addressing homelessness</td>
<td>Number of households assessed, following the end of a relief duty, as owed a main duty due to being unintentionally homeless and in priority need</td>
<td>9,180 in Q3 2018 to Q2 2019</td>
<td>10,910 in Q2 2019 to Q1 2020</td>
<td>4.4</td>
</tr>
<tr>
<td>Reducing rough sleeping</td>
<td>Number of people seen sleeping rough</td>
<td>8,108 in 2016/17</td>
<td>10,726 in 2019/20</td>
<td>4.1</td>
</tr>
<tr>
<td>Reducing homelessness</td>
<td>Number of homeless households living in temporary accommodation</td>
<td>54,370 in December 2017</td>
<td>60,720 in March 2020</td>
<td>4.6</td>
</tr>
</tbody>
</table>
Key statistics for London Boroughs

Definitions used
The dwelling, household and tenure definitions used in Housing in London 2020 are in line with Census and Office for National Statistics definitions. An explanation of the different measures of housing supply, with reference to the targets set out in the Mayor’s London Plan and London Housing Strategy, can be found on the housing supply data sources page on the London Datastore.

Map of Inner and Outer London Boroughs
A map of Inner and Outer London Boroughs, as defined by the ONS, is provided below:
Table 2: Population and households

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Barking and Dagenham</td>
<td>Outer</td>
<td>212,906</td>
<td>78,387</td>
<td>75,829</td>
<td>2.81</td>
</tr>
<tr>
<td>Barnet</td>
<td>Outer</td>
<td>395,869</td>
<td>150,028</td>
<td>152,946</td>
<td>2.59</td>
</tr>
<tr>
<td>Bexley</td>
<td>Outer</td>
<td>248,287</td>
<td>98,947</td>
<td>98,391</td>
<td>2.52</td>
</tr>
<tr>
<td>Brent</td>
<td>Outer</td>
<td>329,771</td>
<td>116,865</td>
<td>120,448</td>
<td>2.74</td>
</tr>
<tr>
<td>Bromley</td>
<td>Outer</td>
<td>332,336</td>
<td>140,021</td>
<td>139,684</td>
<td>2.38</td>
</tr>
<tr>
<td>Camden</td>
<td>Inner</td>
<td>270,029</td>
<td>112,211</td>
<td>105,598</td>
<td>2.56</td>
</tr>
<tr>
<td>City of London</td>
<td>Inner</td>
<td>9,721</td>
<td>4,212</td>
<td>6,506</td>
<td>1.49</td>
</tr>
<tr>
<td>Croydon</td>
<td>Outer</td>
<td>386,710</td>
<td>153,958</td>
<td>161,060</td>
<td>2.40</td>
</tr>
<tr>
<td>Ealing</td>
<td>Outer</td>
<td>341,806</td>
<td>125,126</td>
<td>135,305</td>
<td>2.53</td>
</tr>
<tr>
<td>Enfield</td>
<td>Outer</td>
<td>333,794</td>
<td>130,256</td>
<td>126,255</td>
<td>2.64</td>
</tr>
<tr>
<td>Greenwich</td>
<td>Outer</td>
<td>287,942</td>
<td>111,337</td>
<td>114,398</td>
<td>2.52</td>
</tr>
<tr>
<td>Hackney</td>
<td>Inner</td>
<td>281,120</td>
<td>119,447</td>
<td>111,559</td>
<td>2.52</td>
</tr>
<tr>
<td>Hammersmith and Fulham</td>
<td>Inner</td>
<td>185,143</td>
<td>81,986</td>
<td>89,186</td>
<td>2.08</td>
</tr>
<tr>
<td>Haringey</td>
<td>Inner</td>
<td>268,647</td>
<td>109,259</td>
<td>109,388</td>
<td>2.46</td>
</tr>
<tr>
<td>Harrow</td>
<td>Outer</td>
<td>251,160</td>
<td>87,000</td>
<td>91,909</td>
<td>2.73</td>
</tr>
<tr>
<td>Havering</td>
<td>Outer</td>
<td>259,552</td>
<td>104,460</td>
<td>102,459</td>
<td>2.53</td>
</tr>
<tr>
<td>Hillingdon</td>
<td>Outer</td>
<td>306,870</td>
<td>109,483</td>
<td>110,734</td>
<td>2.77</td>
</tr>
<tr>
<td>Hounslow</td>
<td>Outer</td>
<td>271,523</td>
<td>101,258</td>
<td>101,838</td>
<td>2.67</td>
</tr>
<tr>
<td>Islington</td>
<td>Inner</td>
<td>242,467</td>
<td>106,831</td>
<td>103,740</td>
<td>2.34</td>
</tr>
<tr>
<td>Kensington and Chelsea</td>
<td>Inner</td>
<td>156,129</td>
<td>77,123</td>
<td>87,726</td>
<td>1.78</td>
</tr>
<tr>
<td>Kingston upon Thames</td>
<td>Outer</td>
<td>177,507</td>
<td>69,047</td>
<td>67,642</td>
<td>2.62</td>
</tr>
<tr>
<td>Lambeth</td>
<td>Inner</td>
<td>326,034</td>
<td>140,392</td>
<td>141,507</td>
<td>2.30</td>
</tr>
<tr>
<td>Lewisham</td>
<td>Inner</td>
<td>305,842</td>
<td>130,246</td>
<td>128,115</td>
<td>2.39</td>
</tr>
<tr>
<td>Merton</td>
<td>Outer</td>
<td>206,548</td>
<td>80,188</td>
<td>84,570</td>
<td>2.44</td>
</tr>
<tr>
<td>Newham</td>
<td>Inner</td>
<td>353,134</td>
<td>114,695</td>
<td>116,979</td>
<td>3.02</td>
</tr>
<tr>
<td>Redbridge</td>
<td>Outer</td>
<td>305,222</td>
<td>108,285</td>
<td>104,688</td>
<td>2.92</td>
</tr>
<tr>
<td>Richmond upon Thames</td>
<td>Outer</td>
<td>198,019</td>
<td>83,603</td>
<td>85,564</td>
<td>2.31</td>
</tr>
<tr>
<td>Southwark</td>
<td>Inner</td>
<td>318,830</td>
<td>133,526</td>
<td>136,178</td>
<td>2.34</td>
</tr>
<tr>
<td>Sutton</td>
<td>Outer</td>
<td>206,349</td>
<td>82,820</td>
<td>83,553</td>
<td>2.47</td>
</tr>
<tr>
<td>Tower Hamlets</td>
<td>Inner</td>
<td>324,745</td>
<td>132,174</td>
<td>121,539</td>
<td>2.67</td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>Outer</td>
<td>276,983</td>
<td>102,925</td>
<td>103,642</td>
<td>2.67</td>
</tr>
<tr>
<td>Wandsworth</td>
<td>Inner</td>
<td>329,677</td>
<td>136,494</td>
<td>148,075</td>
<td>2.23</td>
</tr>
<tr>
<td>Westminster</td>
<td>Inner</td>
<td>261,317</td>
<td>120,823</td>
<td>125,312</td>
<td>2.09</td>
</tr>
<tr>
<td><strong>London</strong></td>
<td></td>
<td><strong>8,961,989</strong></td>
<td><strong>3,553,413</strong></td>
<td><strong>3,592,322</strong></td>
<td><strong>2.49</strong></td>
</tr>
</tbody>
</table>

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2. ONS, Mid-year population estimates, 2019
3. GLA, Household projections: central trend (ONS model, 2018-based)
4. MHCLG, Live table 100: number of dwellings by tenure and district
Table 3: Housing stock and new homes

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Barking and Dagenham</td>
<td>Outer</td>
<td>7.0%</td>
<td>22,140</td>
<td>906</td>
<td>68%</td>
</tr>
<tr>
<td>Barnet</td>
<td>Outer</td>
<td>11.0%</td>
<td>18,839</td>
<td>2,209</td>
<td>52%</td>
</tr>
<tr>
<td>Bexley</td>
<td>Outer</td>
<td>4.3%</td>
<td>14,204</td>
<td>486</td>
<td>74%</td>
</tr>
<tr>
<td>Brent</td>
<td>Outer</td>
<td>9.3%</td>
<td>26,930</td>
<td>1,741</td>
<td>41%</td>
</tr>
<tr>
<td>Bromley</td>
<td>Outer</td>
<td>4.5%</td>
<td>19,135</td>
<td>708</td>
<td>68%</td>
</tr>
<tr>
<td>Camden</td>
<td>Inner</td>
<td>7.1%</td>
<td>35,471</td>
<td>827</td>
<td>12%</td>
</tr>
<tr>
<td>City of London</td>
<td>Inner</td>
<td>19.0%</td>
<td>686</td>
<td>55</td>
<td>1%</td>
</tr>
<tr>
<td>Croydon</td>
<td>Outer</td>
<td>10.2%</td>
<td>26,578</td>
<td>1,590</td>
<td>60%</td>
</tr>
<tr>
<td>Ealing</td>
<td>Outer</td>
<td>7.1%</td>
<td>23,918</td>
<td>1,754</td>
<td>50%</td>
</tr>
<tr>
<td>Enfield</td>
<td>Outer</td>
<td>4.7%</td>
<td>18,723</td>
<td>500</td>
<td>60%</td>
</tr>
<tr>
<td>Greenwich</td>
<td>Outer</td>
<td>11.5%</td>
<td>35,513</td>
<td>1,514</td>
<td>48%</td>
</tr>
<tr>
<td>Hackney</td>
<td>Inner</td>
<td>11.9%</td>
<td>45,462</td>
<td>1,522</td>
<td>18%</td>
</tr>
<tr>
<td>Hammersmith and Fulham</td>
<td>Inner</td>
<td>10.1%</td>
<td>25,384</td>
<td>1,046</td>
<td>24%</td>
</tr>
<tr>
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<td>Inner</td>
<td>6.9%</td>
<td>26,956</td>
<td>568</td>
<td>38%</td>
</tr>
<tr>
<td>Harrow</td>
<td>Outer</td>
<td>7.6%</td>
<td>9,137</td>
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</tr>
<tr>
<td>Havering</td>
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<td>4.2%</td>
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<tr>
<td>Kensington and Chelsea</td>
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</tr>
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</tr>
<tr>
<td>Newham</td>
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</tr>
<tr>
<td>Redbridge</td>
<td>Outer</td>
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</tr>
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<td>Waltham Forest</td>
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<td>6.6%</td>
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</tr>
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</tr>
<tr>
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<td></td>
<td><strong>8.6%</strong></td>
<td><strong>804,255</strong></td>
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<td><strong>44%</strong></td>
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</table>

5 GLA analysis of MHCLG, Live table 125: dwelling stock estimates by local authority district
6 MHCLG, Live table 100: number of dwellings by tenure and district, including Local Authority and Registered Provider
7 VOA, Council tax: stock of properties 2019: table CTSOP3.0
8 MHCLG, Live table 122: housing supply: net additional dwellings by local authority district
Table 4: Rents, house prices and earnings

<table>
<thead>
<tr>
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<td>Barking and Dagenham</td>
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<td>Inner</td>
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</tr>
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<td>Inner</td>
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<td>£33,830</td>
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<td>£35,294</td>
<td>14.8</td>
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</tr>
<tr>
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<td>£36,093</td>
<td>11.6</td>
</tr>
<tr>
<td>Tower Hamlets</td>
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<td>£1,700</td>
<td>£498,228</td>
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<td><strong>12.1</strong></td>
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</tbody>
</table>

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9 ONS, Private rental market summary statistics, April 2019 to March 2020
10 Land Registry, UK House Price Index, May 2019. This figure is adjusted for the mix of dwellings sold.
12 ONS, House price to workplace-based earnings ratio: table 5c, 2019. This uses a different measure of earnings and the median house price is not adjusted for the mix of homes sold, so is not comparable to the other figures in the table.
1. Demographic, economic and housing context

London’s population rose to a record 9.0 million in mid-2019, with rapid growth over the last decade in both Inner and Outer London (1.1). Since 1997, the number of jobs in London has grown by 46% and the number of people by 28%, but the number of homes has grown by only 19% (1.2). Since at least the turn of the century, London has seen a net annual inflow of residents in their 20s from the rest of the UK and a net outflow of those aged 30 or above (1.3).

Nearly one in three private renting households in London include children, up from one in five in 2004 (1.4). London’s private rented sector accommodates households on a wide range of incomes, while low income households are primarily concentrated in social rented housing (1.5). The growth in London’s private rented sector has included households from across the income spectrum, but particularly better-off ones (1.6).

Rising house prices in London have generated significant property wealth for its homeowners and widened the wealth gap with other regions (1.7). Around 65% of Londoners say they would support new homes being built in their area, up from just over one third in 2010 (1.8).

The history of housebuilding in London is marked by two distinct booms, the first of private housing in the 1930s and the second of council housing in the 60s and 70s (1.9). After a decade of increases, the estimated number of people per home in London has stabilised since 2016 as the rate of housing growth has caught up with population growth (1.10).

An equal share of households in London own their home, either outright or with a mortgage, and rent their home, either from a public or a private landlord (1.11). Home ownership rates among younger Londoners have fallen sharply in recent decades, though seem to have stabilised in the last couple of years (1.12). The market for new homes in London has diversified over the past 13 years, with an increase in new tenures such as Build to Rent and a decrease in Buy to Let and speculative investment (1.13).

The average floor area per person in London has increased slightly over the past two decades, but there are starkly divergent trends between different tenures (1.14). The density of housing in most London boroughs is far higher than the England average, with densities highest in the City of London and Tower Hamlets (1.15).

Only two in three private tenants in London are satisfied with private renting as a tenure, though eight in ten are satisfied with the accommodation itself (1.16).
1.1. London’s population rose to a record 9.0 million in mid-2019, with rapid growth over the last decade in both Inner and Outer London.

- The trend in London’s population has three distinct periods: first, over a century of rapid expansion from a population of just over one million people in 1801 to 8.6 million in 1939; a half-century of decline to 6.7 million in 1988; and a new period of thus far uninterrupted growth that brought the total population to 8.96 million in 2020.
- The population grew by 53,910 between 2018 and 2019, down from 83,080 in the previous year and below the average annual population growth of 101,900 over the previous decade.
- Growth over the last decade was particularly rapid in Inner London, which saw an increase of 14% compared to 9.2% in Outer London. GLA projections anticipate a further increase of 1.5 million people between 2019 and 2041, which would leave London’s population at 10.4 million.

Source and notes:
Compiled by GLA from:
- 1801-1961: Persons present on Census day (ONS);
- 1961-2019: Estimated mid-year resident population (ONS);
- 2020-2041: GLA 2018 based population projections - central trend

*The GLA projections are ‘unconstrained’ by housing supply: if enough new housing is not built, population growth may well be lower.*
1.2. Since 1997, the number of jobs in London has grown by 46% and the number of people by 28%, but the number of homes has grown by only 19%.

Since 1997, London’s population and economy have grown rapidly, although the trend in jobs is far more cyclical. Between 1997 and 2019, the number of jobs in London grew by 1.91 million (46%) while the population grew by 1.95 million (28%).

However, this rapid economic and demographic growth was not matched by an increase in the housing stock, which grew by only 566,300 homes (19%) over the same period. If the housing stock had grown at the same rate as the population since 1997 there would now be an extra 273,600 homes in London today.

In 2019, London’s housing stock grew faster than the population (1.0% versus 0.6%). The growth in housing stock in London in 2019 was the second highest annual increase recorded since 1997.

Source and notes:
- Compiled by GLA from:
  - Jobs: ONS, Workforce jobs by industry, seasonally adjusted
  - People: ONS, Mid-year estimates
  - Homes: Stock levels from MHCLG live table 125
1.3. Since at least the turn of the century, London has seen a net annual inflow of residents in their 20s from the rest of the UK and a net outflow of those aged 30 or above.

For many years, London has been central to the system of domestic migration flows around the UK. London’s population dynamic is particularly characterised by large net domestic inflows of 20-somethings and domestic outflows of those in their 30s and older. These net flows are themselves the difference between much larger gross flows in and out.

Since 2009, the net domestic outflow of those in their 30s has increased from 16,160 to 38,250 in the year to mid-2019, which is on par with the 2004 peak outflow. The net domestic inflow of those in their 20s has remained steadily above 30,000 during that period, and increased sharply to 46,050 in the year to mid-2019. The total net inflow of 20-39 year olds in the year to mid-2019 was positive (7,800), the first year since 2015 in which there has been a total net domestic migration inflow of these age groups.

Over the same period London has also seen a consistent net domestic outflow of those aged 40 and above.

Source and notes:
- ONS, data on domestic migration.
1.4. Nearly one in three private renting households in London has children, up from one in five in 2004

- 34% of all households in London in 2020 include dependent children aged under 19, a figure that hasn’t changed much since 2004.
- The share of households with children has varied little for households that own their home outright (from 13% in 2004, to 14% in 2020) and fallen slightly for social renting households (from 43% to 38%).
- The most dramatic change over this period has been the substantial growth in the proportion of privately renting households with children, from 20% in 2004 to 34% in 2018, falling slightly to 31% in 2020. In numerical terms, there are now around 274,700 privately renting households with children in London, compared to 95,550 in 2004.
- More recently, the share of households with children has risen for households that are buying with a mortgage (from 44% in 2012 to 51% in 2020).

Source and notes:
- Labour Force Survey household data, 2020
- These figures include any households containing dependent children under 19
1.5. London’s private rented sector accommodates households on a wide range of incomes, while low income households are primarily concentrated in social rented housing.

- Compared to England, London has a relatively unequal distribution of household income, with 33% of London households in the top fifth of national household incomes and 20% in the poorest fifth.

- There are large differences in the income distribution of households in social rented accommodation and in private rented accommodation. 35% of London social tenants are in the bottom fifth of the national household income distribution and only 16% are in the top two fifths. In contrast, 58% of private tenants are in the top two fifths of the national household income distribution and only 14% are in the bottom fifth.

- While the distribution of owner occupiers who own outright is relatively evenly spread, owner occupiers with mortgages are significantly under-represented in the lower income quintiles. 76% of owner occupiers with a mortgage are in the top two fifths of the national household income distribution, while only 9% are in the bottom fifth.

Source and notes:
- Households Below Average Income 2018/19
- The income definition used is net equivalised household income after tax but before housing costs. Previous reports used gross household income from the English Housing Survey.
1.6. The growth in London’s private rented sector has included households from across the income spectrum, but particularly better-off households.

- The number of households in London’s private rented sector more than doubled between 1994/95 and 2018/19. There was significant growth in the number of households from across the income distribution (measured here as quintiles of the national household income distribution), but the fastest growth was in the top two income brackets.

- There was also growth in the number of households owning their home outright, especially at the top and bottom of the income scales.

- The number of households with a mortgage and the number in social housing both fell, with a striking shrinkage in the number of mortgagors from the middle 60% of the national income distribution.

Source and notes:
- Households Below Average Income 2018/19
- The income definition used is net equivalised household income after tax but before housing costs. Previous reports used gross household income from the English Housing Survey.
1.7. Rising house prices in London have generated significant property wealth for its homeowners and widened the wealth gap with other regions.

- A typical homeowner in London has more than twice the net property wealth of one in England, where the median net property wealth is £200,000.

- The typical amount of net property wealth (after subtracting any outstanding mortgage debt) held by homeowners in London nearly doubled in just a decade, rising 86% from a median value of £220,000 in 2006 to 2008, to £410,000 in 2016 to 2018.

- Across England as a whole, the median level of property wealth increased ‘only’ 25% in this period, but this average hides sharp regional divides. Median wealth levels rose only slightly across most of the Midlands and North, and fell 4% in the North East, but grew 50% and 31%, respectively, in the South East and East of England.

Source and notes:
- ONS Property Wealth: Wealth in Great Britain, July 2006 to June 2016, and April 2014 to March 2018
- The data is for two-year periods (for example, July 2006 to June 2008) and the points on the chart are the midpoint of each period. The break in the series is due to the Wealth and Assets Survey moving from a July-to-June year to financial years (April to March) in the 2014 to 2016 period
1.8. Around 65% of Londoners say they would support new homes being built in their area, up from just over one third in 2010.

- The proportion of Londoners who say they would support or ‘strongly’ support new homes being built in their area has fallen slightly from 67% in 2016 to 65% in 2018 but is still far higher than the figure of 34% in 2010.

- The proportion who say they would oppose it (including ‘strong’ opposition) also fell, from 47% in 2010 to 13% in 2017, but rose slightly to 18% in 2018. Net support (support minus opposition) rose from minus 13% in 2010 to plus 49% in 2016 and 2017, and plus 47% in 2018.

- Support for house building is significantly higher in London than in England as a whole, where net support was plus 34% in 2018.

- Both in London and across the country as a whole, net support for house building is highest among social tenants (plus 74% in London) and private tenants (plus 51%) and lowest among homeowners (plus 28%).

Source and notes:
- British Social Attitudes Survey 2010 to 2018.
1.9. The history of housebuilding in London is marked by two distinct booms, the first of private housing in the 1930s and the second of council housing in the 60s and 70s.

- In 2019, MHCLG’s house building statistics recorded 22,000 new build completions. While useful for historical purposes, these figures are known to undercount new supply in London in more recent years – for comparison, there were net completions of 36,120 new homes in London 2018/19 (see section 2.1 in this report).

- The previous two peaks of housebuilding in London were in the 1930s (when new builds averaged 61,500 a year) and the 1970s (averaging 29,400 a year). The 1930s boom was dominated by private builders and the 1960s and 1970s booms were dominated by local authorities, with many of the new homes replacing those lost to slum clearances.

- These figures exclude supply from conversions and changes of use, which are included in other charts later in this report. The growing undercount in recent years is believed to be due to increasingly patchy data returns from building control inspectors (see section 2.2).

Source 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 (MHCLG, 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 MHCLG data below
- 1970 to 2019: MHCLG house building statistics
1.10. After a decade of increases, the estimated number of people per home in London has stabilised in the last few years, as the rate of housing growth has caught up with population growth.

- In 1971 there were 2.9 people for each dwelling in both London and England. Over the next two decades the number of people per dwelling fell across the country but particularly in London, due to a combination of population decline and steady house building.

- In the 1990s new house building in London fell behind population growth, and the estimated number of people per dwelling rose from 2.3 in 1991 to 2.5 in 2014.

- The number of people per dwelling has remained at 2.5 for the past five years as housing growth kept pace with population growth. Over the same period the number of people per dwelling fell in every other region of England.

Source and notes:
Compiled by GLA from:
- ONS mid-year population estimates;
- MHCLG dwelling stock data (tables 104, 109 and 215)
- GLA historical Census tables
1.11. A roughly equal share of households in London own their home, either outright or with a mortgage, and rent their home, either from a public or a private landlord.

- London’s tenure mix underwent a significant change in the first decade of the 21st century; the proportion of households that own their home with a mortgage fell from 38% in 2000 to 29% in 2011, while the proportion that rent on the open market rose from 15% to 25%. The proportion of households in London that rent on the open market rose from 15% in 2000 to 25% in 2011, and in 2019 was 27%.

- In 2019, 51% of households in London owned their homes, including 24% who owned their home outright and 26% who owned their home with a mortgage.

- The proportion of households in London who were in social rented housing, including Affordable Rent housing, was 23% in 2019. Social housing is now the smallest tenure, having been the largest group in the early 1980s.

Source and notes:
Compiled by GLA from:
1.12. Home ownership rates among younger Londoners have fallen sharply in recent decades, though seem to have stabilised in the last couple of years.

- London’s home ownership rate has fallen in recent decades, but there are stark differences in the trends for different age groups. In 1990, 25% of households in London headed by someone aged 16-24 and 57% of households headed by someone aged 25-34 owned their home. However, by 2019 these figures had fallen to 5% and 29% respectively, although recent years have seen some stabilisation.

- Home ownership rates also fell for households headed by someone aged 35-44 (from 69% to 47%) and 45-54 (71% to 54%). The proportion of households headed by someone 65 or older that owned their own home rose relatively steadily from 49% in 1990 to 69% in 2014 but also seems to have levelled off recently.

Source and notes:
- Labour Force Survey household datasets, 1990 to 2018
- Annual Population Survey household dataset 2019
1.13. The market for new homes in London has diversified over the past 13 years, with an increase in new tenures such as Build to Rent and a decrease in Buy to Let and speculative investment.

- The research consultancy Molior analysed London’s housebuilding sector in 2006, 2013 and 2019, identifying the mix of buyers of new market homes on large (20+ open market sale homes) sites in each year.

- Buy to Let landlords were the largest category of buyers in 2006 and 2013, accounting for 45% of sales in 2006, but by 2019 accounted for just 25%. Meanwhile, the share of Build to Rent purchasers increased threefold from 9% in 2006 to 26% of new home sales in 2019.

- Owner occupiers using Help to Buy were the largest category of buyers in 2019, accounting for 32% of sales. Owner occupiers buying without assistance from Help to Buy accounted for just 10% of new home sales in 2019.

- The market share of Buy to Sell investors decreased from 16% in 2006 to just 2% in 2019. The remaining market homes were bought by social landlords for use as affordable housing.

Source and notes:
- Molior London research
1.14. The average floor area per person in London has increased slightly over the past two decades, but there are starkly divergent trends between different tenures.

- The average home in London has 81m$^2$ of floor area and, when divided by the average household size of 2.48, that gives an average of just under 33m$^2$ of floor area per person, a figure that has risen slightly from 31m$^2$ in 2001.

- There are stark differences in average floor area per person by tenure, with those in owner occupied homes seeing an increase in floor area from 34m$^2$ per person in 1996 to just over 40m$^2$ in 2017. Meanwhile, private renters saw a decrease in floor area per person from 31m$^2$ to 25m$^2$.

- Social renters, who in the 1990s had noticeably the least space, now have an average of 27m$^2$ per person, slightly more than in 1996 and slightly more than private renters.

Source and notes:
- Survey of English Housing and English Housing Survey
- Floor area per person is calculated as the average floor area per occupied dwelling divided by average household size
- The points represent estimates for individual years, and a trend has been interpolated to smooth out volatility (which is indicated by the shaded area)
1.15. The density of housing in most London boroughs is far higher than the England average, with densities highest in the City of London and Tower Hamlets.

- London has an average housing density of 67 dwellings per hectare (dph) when taking into account just residential land (homes plus gardens) as opposed to all land, compared to 31dph across England as a whole.

- Apart from the City of London at 345dph, the local area with the highest density in the country is Tower Hamlets at 241dph. 18 of the top 20 are in London, with Portsmouth the highest density non-London area at 76dph.

- Some of London’s boroughs have densities similar to the national average, with Bromley the lowest density borough at 31dph. Across the country as a whole the least dense area is Wealden, in East Sussex, at 13dph.

Source and notes:
- GLA analysis combining data from MHCLG land use statistics and dwelling stock statistics, both 2018
1.16. Only two in three private tenants in London are satisfied with private renting as a tenure, though eight in ten are satisfied with the accommodation itself.

- Owner occupiers in London are predominantly satisfied with their accommodation and with homeownership in general (94% and 95% satisfied respectively), though satisfaction levels fell slightly in 2017/18.

- Satisfaction levels are lower for social tenants, of whom 78% reported being satisfied with their accommodation and 81% being satisfied with social renting as a tenure. Satisfaction levels of social tenants improved in 2017/18.

- The most striking pattern is among private rented tenants, of whom 80% are satisfied with their accommodation but only 65% are satisfied with renting privately as a tenure. This disparity may be driven in part by frustrated aspirations to homeownership or by insecure tenancies.

- Across all tenures, 86% of households are satisfied with their accommodation and 83% with their tenure. These measures have changed little over the last five years.

Source and notes:
- English Housing Survey data, 2017/18
2. Housing stock and supply

According to provisional estimates, there were 36,130 net conventional new housing completions in London in 2018/19, a 16% increase on the previous year (2.1), but the various official data sources give present quite different pictures of housebuilding trends in London (2.2). A net 107,800 new homes were completed in London in the last three years, with both total supply and tenure mix varying widely at borough level (2.3). Around one fifth of new homes built in 2018/19 had three or more bedrooms, up from 15% in 2008/09 (2.4).

Planning approval was granted for around 82,800 new homes in London in 2018/19 (2.5). 37% of homes recommended for approval by the Mayor in 2019 were affordable homes, although in absolute terms the number of affordable homes approved fell (2.6). A total of 10,100 homes were approved on small schemes in London in 2018/19, two fifths of which were in new build developments (2.7).

The number of tall buildings completed in London increased significantly between 2001 and 2019, but looks likely to fall in 2020 (2.8). The Build to Rent (BTR) sector’s contribution to new housing supply in London is growing, though the rate of growth slowed in 2019 (2.9). In June 2020 there were 44 schemes in London being brought forward on publicly owned land through the Small Sites Small Builders programme (2.10).

2019/20 saw the highest number of affordable housing starts funded through GLA programmes since 2012/13, when housing investment was devolved to City Hall, and the highest number of affordable home starts since GLA records began in 2002/03 (2.11). Councils in London started 3,300 new homes in 2019/20, the highest figure since early 1980s (2.12). The number of affordable homes completed in London in 2018/19 was 9,205, the third annual increase in a row but still below the average of the last three decades (2.13).

London (as well as other English regions) has relatively high housing construction costs compared to other world cities (2.14). But the design quality of London’s housing schemes is good compared with other English regions (2.15). The proportion of newly approved new build homes in London meeting accessibility and wheelchair standards had fallen in recent years, but increased in 2018/19 (2.16).

In the seven years between 2012/13 and 2018/19, there were around 260,000 new homes completed in London (2.17). 1,435 council homes in London were sold through the Right to Buy scheme in 2019/20, continuing a downward trend since 2014/15 (2.18). There were 785,100 affordable homes (excluding shared ownership) in London in 2019, up slightly from the year before but down slightly from two decades ago (2.19).

The proportion of homes in London officially recorded as empty increased slightly in 2019, but at 2% is far below its long-term average (2.20). London boroughs have issued around 11,700 Homes in Multiple Occupation with mandatory licences, although this represents only a small portion of the total number of HMOs in London (2.21).
2.1. According to provisional estimates, there were 36,130 net conventional new housing completions in London in 2018/19, a 16% increase on the previous year...

- The net number of new homes completed in London in 2018/19 was 36,130, 16% higher than 2017/18 and the second highest number of completions recorded since 2004/05. When completions of non-self-contained homes and changes in the number of long-term empty homes are taken into account, the total net housing supply was 35,700.

- The number of market housing completions increased from 26,806 in 2017/18 to 29,620 in 2018/19, while the number of affordable homes rose from 4,240 in 2017/18 to 6,510. Affordable homes comprised 18% of net conventional housing completions in 2018/19, up from 14% in 2017/18 but down from 41% in 2011/12.

- Given the timescales involved in housing development, the recent increases in affordable housing approvals and starts reported later in this chapter will take time to feed through to the completions data reported here.

Source and notes:
- London Development Database. Data for 2018/19 is provisional based on LDD estimates
- GLA net conventional completions figures include new building, conversions and changes of use
- 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
- As the LDD is continually updated, these figures do not exactly match those published in past GLA London Plan Annual Monitoring Reports, or past Housing in London reports
- Appendix A3 compares the main sources of data on housing supply
2.2. … but the various official data sources present quite different pictures of housebuilding trends in London.

- There are significant differences between the main sources of statistics on housebuilding in London, as set out in further detail in Appendix A3.

- The quarterly data released by MHCLG on ‘new build dwellings’ does not count new homes created through conversions and changes of use of existing properties, and is also believed to undercount the number of new build homes (see notes to the right).

- Analysts increasingly use MHCLG data on Energy Performance Certificates (EPCs) to monitor the number of new dwellings. As seen above, this data has largely tracked the LDD net conventional completions data count over recent years. After a dip in 2017/18, the number of EPCs lodged rose to 42,510 in 2019/20.

Source and notes:
- London Development Database (provisional data for 2018/19)
- MHCLG EPCs
- MCHLG new build dwellings
- The undercount in the MHCLG new build dwelling series is partly due to a reduced market share of the National Housebuilding Council (NHBC), who provide the bulk of this data to MHCLG.
2.3. A net 107,800 new homes were completed in London in the last three years, with both total supply and tenure mix varying widely at borough level.

- Over the last three years (2016/17 to 2018/19) a net 107,800 new homes were completed in London, of which 90,230 (84%) were market homes. 8,664 (8%) new homes were intermediate tenure, 5,084 (5%) were Affordable Rent and the remaining 3,825 (4%) were social rent (including 106 London Affordable Rent).

- At borough level, the highest numbers of completions over the last three years were in Tower Hamlets (7,798), Barnet (6,948) and Newham (6,826). More homes were completed in these three boroughs than in the 13 boroughs with the lowest number of completions combined.

- The chart above also shows the tenure split of completions in each borough. Over this period the highest proportion of new affordable housing was in Waltham Forest (28%), followed by Hounslow (26%) and Islington (26%). The lowest was in Harrow and Hillingdon (both 7%).

Source and notes:
- GLA Annual Monitoring Report 16 (provisional data)
- To ensure legibility the chart does not show net losses of social rented housing in four boroughs: 198 in Bexley, 108 in Enfield, 100 in Harrow, 82 in Greenwich, 81 in Newham and 12 in Barnet.
2.4. Around one fifth of new homes built in 2018/19 had three or more bedrooms, up from 15% in 2008/09.

- The proportion of new homes with three or more bedrooms (the usual definition of ‘family sized’) in London rose to over a third of gross conventional housing completions at the turn of the century, but fell rapidly through the 2000s as the share of flats in new supply increased.

- With the end of the housing boom and the associated credit crunch in 2008/09, speculative investment in new flatted developments fell back. This led the proportion of family sized homes to rise again, reaching 24% in 2011/12 before falling to 20% in 2015/16, where it had remained.

- In 2018/19, 22% of new homes built had three or more bedrooms, including 41% of social rented homes. In absolute terms, 8,874 family sized homes were completed in 2018/19, the second highest number yet recorded after 8,927 in 2016/17.

Source and notes:
- MHCLG live table 254 (discontinued in 2011/12)
- GLA London Plan Annual Monitoring Reports from 2008/09 (provisional data for 2018/19)
- The figures in this chart are based on gross completions and take no account of losses due to demolition or replacement.
2.5. Planning approval was granted for around 82,800 new homes in London in 2018/19

- The net number of new homes receiving planning approval in London is always higher than the eventual completions, as some approvals are duplicates and some schemes that are approved are never started.

- Over the last decade, a net average of around 72,300 new homes were approved each year, with a provisional figure of 82,800 approvals in 2018/19. The new London Plan target is 52,300 new homes per year from 2019/20.

- The percentage of total approvals that were affordable homes fell significantly between 2007/08 and 2014/15, from 33% to 14%. This is partly due to higher numbers of market housing increasing the total number of approvals. The percentage of new home approvals that were affordable was 22% in 2018/19.

Source and notes:
2.6. 37% of homes recommended for approval by the Mayor in 2019 were affordable homes

- 29,690 homes were recommended for approval at Stage Two or Stage Three by the Mayor in 2019. This is a 31% decrease on the previous year (due to a fall in the number of referable schemes rather than in increase in refusals) and below the average number of residential homes determined by the Mayor prior to 2016.

- Of the homes determined by the Mayor in 2019, 11,000 homes were affordable, down 22% on the previous year. The number of market homes determined by the Mayor in 2019 was 18,700, down 35% on the previous year.

- Despite the fall in the absolute number of homes determined by the Mayor, the share of homes recommended for approval that were affordable increased from 33% of the total in 2018 to 37% in 2019, the highest proportion of affordable homes yet recorded.

- Across all schemes approved in 2019, affordable housing comprised an average of 40% of habitable rooms, up from 32% in 2017 and 35% in 2018.

Source and notes:
- GLA monitoring of referable planning decisions
- The dates of the Stage Two decisions have been used to allocate schemes to years
2.7. A total of 10,100 homes were approved on small schemes in London in 2018/19, two fifths of which were in new build developments.

- A total of 68,500 homes have been approved on small schemes in London since 2012/13, the majority of which were on new build or change of use developments.
- Each year, around 10,000 homes are approved on small schemes of less than 10 homes in London. Up until 2016/17, the majority of homes approved on small schemes were in developments that involved a change of use from a non-residential use such as offices or industry. From 2016/17 onwards, new build developments accounted for the largest proportion of homes approved on small schemes.
- In 2018/19, 41% of homes approved on small schemes were in new build developments, while only 23% were in schemes involving a change of use. A further 24% of homes approved on small schemes were on schemes involving a total or part-conversion, and the remainder were on schemes involving an extension.

Source and notes:
- London Development Database (LDD) planning permissions data on the London Datastore
- Figures stated here may not match figures given in London Plan Annual Monitoring Reports as LDD data is revised over time
2.8. The number of tall buildings completed in London increased significantly between 2001 and 2019, but looks likely to fall in 2020

- In 2019 a total of 60 tall buildings (defined as those with 20+ storeys) were completed in London, more than double the 25 completed in 2018 and the highest figure since this data was first collected in 2001.

- However, even before the onset of the Coronavirus pandemic it seemed likely that tall building completions would fall in the following years, as both permissions and starts had fallen from their peaks in 2014 and 2016, respectively.

- These projects are mostly but not entirely residential: 88% of the 60 tall buildings completed in 2019 included some housing, delivering a total of 16,470 new homes.

Source and notes:
- New London Architecture tall buildings report (various years)
2.9. The number of purpose-built privately rented or Build to Rent homes in London is growing, though the rate of growth slowed in 2019.

- Build to Rent (BTR) schemes are purpose-built for market rent. There are a range of organisations active in London’s BTR market including institutional investors, private developers, local authorities and housing associations.

- Since January 2009, 34,900 BTR homes have started construction and 21,990 have been completed.

- The sector is growing in importance: in 2019, 26% of new build market homes sold in London were sold to BTR purchasers, down slightly from 32% in 2018.

- 12,910 BTR homes were under construction at the end of 2019, which is one in five of all open market homes under construction. This suggests BTR will continue to support new housing supply in London in the near future.

Source and notes:
- Molior, quarterly BTR starts and completions
- The cumulative figures count BTR homes that have been started or completed since 2009
2.10. In June 2020, there were 44 schemes in London being brought forward on publicly owned land through the Small Sites Small Builders programme

- The Mayor’s Small Sites Small Builders programme, launched in 2018, helps to make more small, publicly-owned sites available to small developers, housing associations and community-led organisations so they play a bigger role in building the homes that London needs.

- As of June 2020, a total of 44 sites were at various stages of being brought forward. Ten were being marketed on the GLA portal, 30 had a preferred bidder(s) selected, three had been submitted to planning and 1 (in Barnet) had started on site.

- The public landowners could choose to impose restrictions governing the use of the site for affordable housing. Twelve schemes had no restrictions, three were earmarked for community housing, ten were to have 50% affordable housing and 19 (18 of them in Hounslow) were for 100% affordable housing.

Source and notes:
- GLA Small Sites Small Builders programme data
2.11. 2019/20 saw the highest number of affordable housing starts funded through GLA programmes since 2012/13, the year housing investment powers were devolved to City Hall

- The number of GLA-funded affordable homes started in London in 2019/20 was 17,260, an increase of 19% from 14,540 in 2018/19. This was the highest level since investment powers were devolved to City Hall 2012/13, and indeed since GLA records began in 2002/03.

- 7,156 (41%) of the GLA-funded affordable homes started in 2019/20 were at social rent or London Affordable Rent (LAR) levels, a 79% increase from 3,991 in 2018/19 and also the highest number since 2012/13.

- 8,570 (50%) of the GLA-funded affordable homes started in 2019/20 were intermediate, down in percentage terms but slightly up in absolute terms from 2018/19. 8% of affordable homes started in 2019/20 comprised Affordable Rent homes above the London Affordable Rent benchmarks, and the tenure of the remaining 1% homes was still to be agreed.

Source and notes:
- GLA Affordable Housing Statistics
- Responsibility for affordable housing investment was devolved to the Mayor of London in April 2012
- The Mayor’s current funding programmes include, amongst others, the Homes for Londoners Affordable Homes Programme 2016-21 and Building Council Homes for Londoners
- Intermediate homes include shared ownership, intermediate rent, London Living Rent, and a number of other products
2.12. Councils in London started 3,300 new homes in 2019/20, the highest figure since early 1980s.

- Council housebuilding in London peaked in the 1970s, and in the early 1980s London councils were still starting substantial numbers of new homes, with 4,670 homes started by councils at the last peak in 1982/83.

- By the end of the decade, the combined effect of government-imposed borrowing restrictions and an absence of grant funding meant that very few council homes were being started, a situation that persisted for two decades with only 990 homes started between 1990/91 and 2009/10.

- More recently, the re-introduction of self-financing and the Mayor’s Building Council Homes for Londoners programme have enabled councils to ramp up supply again. In 2019/20, 3,300 new council home starts were recorded by the GLA, almost double the 1,916 starts recorded in 2018/19, and the highest figure since the 1982/83 peak.

Source and notes:
- Figures for 1980/81 to 2017/18 are from MHCLG live table 253
- Figures for 2018/19 to 2019/20 are from GLA affordable housing statistics
2.13. The number of affordable homes completed in London in 2018/19 was 9,205, the third annual increase in a row but still below the average of the last three decades.

- Counting homes funded from all sources, a total of 9,205 affordable homes were completed in London in 2018/19, a 29% increase on 2017/18 and a 59% increase on the 28-year low recorded in 2015/16.
- The mix of new affordable homes completed has changed significantly since the beginning of the 2010s, with the introduction of Affordable Rent in 2010 and London Affordable Rent (LAR) in 2016.
- In 2018/19, only 1,536 social rent and LAR homes were completed, 17% of new affordable homes. This compares to 37% Affordable Rent completions (3,446) and 46% intermediate completions (4,223).
- The level of GLA-funded starts in 2018/19 (Chart 2.11) suggests the number of social rent and LAR completions is likely to rise in the coming years.

Source and notes:
- MHCLG affordable housing supply live tables 1006C, 1006aC, 1006bC and 1007c
- The method for collecting these statistics is different from the net conventional completions measure used earlier in this report. The figures include acquisitions and do not net off losses to the stock and therefore represent gross completions.
- As well as homes not funded by the GLA, MHCLG statistics include Assisted Purchase Sales and acquisitions.
2.14. London (as well as other English regions) has relatively high housing construction costs compared to other world cities.

- In 2019 Turner and Townsend estimated the average construction cost of different types of housing in the UK and in cities around the world, assuming a typical built form for each area and adjusting for the local costs of labour and materials.

- According to these estimates, the cost to build a townhouse in London is around £3,000 per square metre, compared to around £2,700 for a low-rise apartment and around £3,600 for a high-rise apartment.

- The estimated costs for each housing type were lower in other English regions, but on the whole were lower still in Paris, Tokyo and New York City. For example, the estimated construction cost per square meter of a low-rise apartment building in London is 66% more than in Paris, 41% more than in Tokyo and 140% more than in New York. Key factors behind London’s higher costs cited by Turner and Townsend include labour skills shortages, a weakening pound and rising material input prices.

Source and notes:
- Turner and Townsend international construction market survey 2019
- Data was collated in Q4 2018, and assumed that building costs are based on the typical building standards and methods for each area
- Costs were estimated by calculating costs in local currencies and then adjusting for the costs of a standard ‘basket’ of labour and material costs
2.15. The design quality of housing schemes in London is generally better than in other English regions, though the majority are “mediocre”

- A new audit of housing design quality was carried out in 2019, evaluating 142 recently built schemes around the country, including 20 in London.

- Out of the nine English regions, London received the highest average design quality score, and the highest proportion described as good (30%) or very good (20%). Across England as a whole 19% of schemes were described as good and 7% as very good. Only a small proportion of schemes in London (5%) were described as having ‘poor’ design quality and none were described as ‘very poor’ (compared to 19% and 1% respectively across England as a whole).

- London also showed the greatest improvement of any region in the proportion of schemes achieving high ratings since the previous comparable set of audits were carried out in 2004 to 2007.

Source and notes:
- Place Alliance, A Housing Design Audit for England
- The audit covered schemes of 50+ homes built between April 2014 and 2019 that reflected the ‘typical’ volume housebuilder’s product. Schemes from town / city centre locations were excluded.
2.16. The proportion of newly approved new build homes in London meeting accessibility and wheelchair standards had fallen in recent years, but increased in 2018/19

- 74% of new build homes approved in London in 2018/19 were recorded as being in compliance with Building Regulation M4(2) (previously the Lifetime Homes Standard), a significant decrease from 2012/13 when 95% of new build homes approved were designed to be accessible or adaptable.

- 9.3% of new build homes approved in London in 2018/19 were recorded as being in compliance with Building Regulation M4(3) (wheelchair accessible homes), an increase from the 7.0% homes recorded in 2017/18 but still below the high of 10% in 2013/14.

- These changes are partly because compliance with Building Regulations M4(2) and M4(3) can be optional. Although homes may be designed to these standards, they are only counted if compliance is mentioned in the decision notice.

- The Intend to Publish London Plan (2019) requires 90% of new build homes to meet Building Regulation requirement M4(2) and 10% should meet requirement M4(3).

Source and notes:
- GLA, London Plan Annual Monitoring Reports (provisional data for 2018/19)
- Only schemes that are 100% new build are included in the figures. Split schemes (some new build and some conversion of existing buildings) are not taken into account
- M4(2) and M4(3) replaced Lifetime Homes and Wheelchair Accessible Homes standards on all approvals granted from October 2015 onwards
2.17. Between 2012/13 and 2018/19, there were around 260,000 new homes completed in London, with the greatest number built in the former Athlete’s Village and other parts of Stratford.

The map above shows where the new homes completed between 2012/13 and 2018/19 were located on a 1 kilometre grid. The size of each circle corresponds to the number of homes completed in an area and the shade to the proportion of homes that were affordable (darker shade indicating a higher share of affordable housing).

According to this measure, the area with most new homes completed between 2012/13 and 2018/19 was in Stratford, including the former Athletes Village. 31% of the homes completed there were of an affordable tenure.

Source and notes:
- GLA, Planning permissions on the London Development Database
- Completions have been aggregated to a 1 kilometre grid
2.18. 1,435 council homes in London were sold through the Right to Buy (RTB) scheme in 2019/20, continuing a downward trend since 2014/15.

- 1,435 council homes in London were sold through the RTB scheme in 2019/20, down 16% from 2018/19. This is far below the most recent peak of 12,780 in 2003/04, or the record annual figure of 26,260 in 1990.

- The average discount from market price in London was 34% in 2018/19, down slightly from the previous six years but still above the level of discounts recorded between 2006/07 and 2012/13. In 2015, the RTB maximum discount in London was increased to £100,000 and, since April 2020, the maximum discount in London is £112,300.

- The average market value of a home sold under the RTB scheme was £305,200 in 2018/19, up 8.8% from 2017/18, and the average discount was £103,200.

- The number of RTB replacement homes started/acquired by local authorities in London since 2012/13 is 9,512, which is less than half of the number of RTB homes sold over the same period (20,140).

Source and notes:

- MHCLG, live tables 643, 670 and 685, 693 and Local Authority Housing Statistics (Section B)

- The number of sales in 2019/20 is estimated by annualising the total for the first three quarters

- Data on sales values and discounts is not yet available for 2019/20
2.19. There were 785,100 rented affordable homes owned by social housing landlords in London in 2019, up slightly from the year before but down slightly from two decades ago.

- Local authorities in London owned 391,000 affordable homes (including social rent and Affordable Rent) in April 2019, and housing associations owned another 394,100, for a total of 785,100 (excluding shared ownership). This total was up slightly from 783,000 in 2018 but down 4.8% from 1997, although the total has been relatively steady at around 800,000 for the last two decades.

- Over this period the share of affordable homes in London owned by housing associations has grown from 25% in 1997 to 50% in 2019, driven by a combination of new supply and stock transfers from council ownership.

- In England, the number of homes owned by local authorities and housing associations fell by 7.3% between 1997 and 2019, and the proportion of affordable homes owned by housing associations rose from 22% to 61%.

Source and notes:
- MHCLG live table 109
- These figures differ from those presented in recent reports because they are based on a new data source that excludes a small number of non-self-contained homes that were included in previous data sources.
2.20. The proportion of homes in London officially recorded as empty increased slightly in 2019, but at 2% is far below its long-term average

According to Council Tax data there were 71,670 empty homes in London in 2019, equivalent to 2.0% of the total dwelling stock, up from a low of 1.7% in 2014.

Long term data indicates that both the number of recorded empty homes in London and their share of the total housing stock are at very low levels, having fallen steadily from a figure of 160,500 empty homes in 1993 (5.4% of the stock at the time).

In 2019, there were 24,680 homes in London that had been recorded as empty for more than six months, equal to 0.7% of the total dwelling stock.

These figures show homes recorded as empty for Council Tax purposes. As such, it is likely that they will not pick up some ‘frictional’ vacancies, such as homes that are briefly vacant between one tenant moving out and another tenant moving in.

Source and notes:
- Data from 1978 to 2011 is a combination of historical data provided to GLA by MHCLG and figures reported by local authorities in their Housing Strategy Statistical Appendix returns
- Data from 2004 onwards is from council tax statistics published by MHCLG in live table 615
- MHCLG suggest that these figures may undercount empty homes since the removal of empty property discounts from Council Tax in many areas has reduced the incentive for owners to report homes as empty
2.21. In 2019, there were 11,700 Homes in Multiple Occupation with mandatory licences issued by London boroughs, although this represents only a small portion of the total number of HMOs.

- A House in Multiple Occupation (HMO) is a property rented out by at least three people who are not from the same ‘household’ (such as a family), but who share facilities like bathrooms and kitchens.

- An HMO must be licensed if it is rented to five or more people who share facilities and who form more than one household, and where the property being occupied by that household is at least three storeys high.

- The number of HMOs that have been issued with mandatory licences in London increased by 30% from 9,020 in 2018 to a high of 11,700 in 2019.

- The number of HMOs that have been issued with mandatory licences are a fraction of the total number of HMOs. In 2019, local authorities estimated there were a total of 185,910 HMOs in London, of which 46,540 were mandatory licensable.

Source and notes:
- MHCLG, Local Authority Housing Statistics: data returns for 2018 to 2019 (Section F – condition of dwelling stock)
3. Housing costs and affordability

Housing affordability, as measured by the median share of housing costs in total household income, improved for all tenures between 2016/17 and 2017/18 (3.1). Average house prices in London in March 2020 were six times their 1970 level after adjusting for inflation (3.2). Average neighbourhood level house prices vary enormously in London, from just over £200,000 in parts of outer East London to around £3 million near Hyde Park and Knightsbridge (3.3).

The level of new home buyer mortgage lending in London continues to be subdued, with new home mover mortgages as low as the levels last seen during the crash in 2008/09 (3.4). First-time buyers in London are generally taking out mortgage loans at lower shares of their home’s value than they were before the financial crisis (3.5). Those who manage to buy a home for the first time in London are now putting down an average deposit of over £150,000, up from £45,000 in 2005 (3.6). First-time buyers and home movers are also borrowing much higher multiples of their income than in previous decades (3.7). There were 6,290 homes bought in London through Help to Buy in 2019, with almost two thirds of those purchases in Outer London (3.8).

London’s housing market generated almost £3.3 billion in Stamp Duty receipts in 2018/19, the lowest in four years but still 39% of the England total (3.9). Buyers of London property worth over £500,000 would save £15,000 due to the government’s temporary Stamp Duty reduced rates, assuming prices did not rise in response (3.10).

Average private rents in London have risen by 43% since 2005, by far the largest increase of any English region (3.11). 2019 saw a continued improvement in the affordability of private rents in London, when compared to trends in average earnings (3.12). London has by far the highest average private sector rents in England, with a typical one-bedroom home costing more than a typical three-bedroom home in other regions (3.13). There is significant variation in monthly market rents within London, and within the most expensive boroughs, there is substantial difference between the top and bottom of the market (3.14).

The total number of Housing Benefit and Universal Credit recipients in London increased to a high of 953,100 in May 2020 due to a spike caused by the Coronavirus pandemic (3.15). A decade of cuts to Housing Benefit and other welfare reforms have left tenants in London with much less support to pay their rent (3.16). The typical rent for a two-bedroom social rented home in London is £114 a week, compared to £180 a week for an Affordable Rented home (3.17).
3.1. Housing affordability, as measured by the median share of housing costs in total household income, improved for all tenures between 2016/17 and 2017/18

- There are several ways to measure the affordability of housing. This chart compares trends in affordability using a relatively comprehensive measure, which includes gross income from benefits and from all household members.

- By this measure, the median household in London spent 26% of their income on housing costs in 2017/18, down from the high of 28% in 2016/17 but above the 25% of income spent on housing costs in 2010/11.

- There are significant disparities by tenure, with the typical private renting household spending 33% of its income on housing costs in 2017/18 (down from 37% in 2016/17 but up from 30% in 2010/11), social housing tenants spending 30% (up from 29% in 2010/11) and homeowners just 17% (up from 16% in 2010/11).

Source and notes:
- GLA analysis of English Housing Survey data
3.2. Average house prices in London in March 2020 were six times their 1970 level after adjusting for inflation

- London’s average house price was £465,500 in March 2020, according to the UK House Price Index (adjusted for inflation), which is 1.9% higher than a year before. Prices fell 11% in real terms between March 2016 and May 2019, before rising 5% through to March 2020. The effects on house prices of the Coronavirus pandemic and lockdown are not yet clear.

- The average house price across England fell by 0.5% over the last year in real terms, to £237,100. However, the average house price in England is still 7% above its level a decade earlier, while the average house price in London is 30% higher than in 2010.

- Since the mid-1980s, every market cycle has left London’s real terms house prices considerably higher than they were before. Average house prices in London are now over six times their 1970 level, after adjusting for inflation.

Source and notes:
- UK House Price Index (UKHPI) adjusted for RPI
- Data is quarterly until the end of 1994 and monthly thereafter
- Publication of the UK House Price Index was suspended following the March 2020 publication due to the impact on sales of Coronavirus
3.3. Average neighbourhood level house prices vary enormously in London, from just over £200,000 in parts of outer East London to around £3 million near Hyde Park and Knightsbridge.

Median house price by Middle Super Output Area, 2019

- In 2019, the simple median price for a home sold in London (unadjusted for the type of home sold) was £475,000, up from £467,500 in 2018. At neighbourhood level the median price varied enormously, from £3.1 million in Knightsbridge, Belgravia and Hyde Park to £217,000 in Erith East.

- The top six most expensive neighbourhoods in London are all in Westminster and Kensington and Chelsea, with the Wimbledon Common area of Merton and the Bankside area of Southwark the only exceptions in the top ten.

- Over the course of 2019 there was a slight convergence in neighbourhood-level house prices across London, with prices in cheaper areas rising faster (or falling slower) than those in expensive areas.

Source and notes:
- ONS, House price statistics for small areas in England and Wales to year ending December 2019
3.4. The level of new home buyer mortgage lending in London continues to be subdued, with new home mover mortgages as low as the levels last seen during the crash in 2008/09

- In 2019/20 there were 41,340 new mortgages advanced to first-time buyers in London, up 1.1% from 2018/19 but below both the recent annualised peak of 47,400 in Q3 2014 and the recorded high of 59,600 in Q3 2004.

- The number of loans to home movers (owner occupiers moving house) in London has fallen by almost a quarter (24%) since the beginning of 2016. There were 27,350 in 2019/20, up 0.8% on the previous year but far below the recorded annualised peak of 99,200 in Q3 2004. First-time buyers now account for 60% of all new mortgage advances, an all-time high.

Source and notes:
- UK Finance mortgage lending statistics (tables RL1R and RL2R)
- These figures are different to those reported in previous bulletins, in part due to a change in the data source and data collection methodology when UK Finance replaced the Council of Mortgage Lenders industry data tables in 2019
3.5. First-time buyers in London are generally taking out mortgage loans at lower shares of their home’s value than they were before the financial crisis

- In 2005/06, loans with LTVs of more than 90% comprised over one third of all lending to first-time buyers in London. However, this share fell to just 1.5% in 2010/11.

- Since 2015, the proportion of loans at LTVs of 90% and above increased and was 15% in the year to June 2019. Loans at LTVs of more than 95% have remained virtually non-existent (0.6% of the total) since the financial crisis. Loans with LTVs of 50% or less comprised 21% of total first-time buyer mortgage loans in the year to June 2019. This figure has been broadly stable for the last four years.

- The trend towards lower LTVs is partly supported by Help to Buy policy in London, which reduces the amount of debt to be covered by a mortgage. 14% of first-time buyers in London in the year to June 2019 used Help to Buy.

- These figures do not reflect the impact of the Coronavirus pandemic, which at the time of writing appears to have reduced the availability of high-LTV mortgages even further.

Source and notes:
- FCA, Mortgages Product Sales Data (PSD) Table 6.1, H1 2019
- Help to Buy in London provides government-backed equity loans of up to 40% of the property value, on properties valued up to £600,000
3.6. Those who manage to buy a home for the first time in London are now putting down an average deposit of over £150,000, up from £45,000 in 2005.

A combination of rising prices and falling loan-to-value ratios has resulted in huge increases in the average mortgage deposit put down by first-time buyers in London over the last fifteen years.

In 2005, the average first-time buyer deposit in London was £45,000, already significantly higher than the average of £26,000 across England as a whole.

By 2020, the average deposit in London had more than trebled to £151,000, while at the national level the increase was ‘only’ to £61,000. In both cases, these amounts far exceed the savings of most renting households.

Source and notes:

- UK Finance mortgage lending statistics
- These figures are different to those reported in previous bulletins. This change reflects access to more comprehensive data and improved information on total market size, as well as a move to mean averages rather than medians.
- Smoothing has been applied to the original monthly data.
3.7. First-time buyers and home movers are also borrowing much higher multiples of their income than in previous decades.

- The average first-time buyer in London borrowed 3.83 times their income in 2019, up from just 1.88 in 1980.

- Home movers, who usually have equity from the sale of their previous home, had typically borrowed at a lower income ratio than first-time buyers. However, the two have now converged. Home movers in London borrowed an average of 3.78 times their incomes in 2019.

- In June 2014, the Bank of England recommended that mortgage lenders do not extend more than 15% of new residential mortgages at loan-to-income ratios at, or greater than, 4.50. This is expected to constrain further increases in median loan-to-income ratios for buyers in London.

- London’s average loan-to-income ratios are higher than the national averages. Across the UK first-time buyers borrowed an average of 3.51 times their income in 2019.

Source and notes:
- UK Finance mortgage lending statistics (tables RL1A and RL2A)
- These figures are different to those reported in previous bulletins, in part due to a change in the data source and data collection methodology. In 2019 UK Finance replaced the Council of Mortgage Lenders industry data tables. This change reflects access to more comprehensive data and improved information on total market size, as well as a move to mean averages rather than medians.
3.8. There were 6,290 homes bought in London through Help to Buy in 2019, with almost two thirds of those purchases in Outer London.

- 6,290 new homes were bought in London with assistance from the government’s Help to Buy equity loan scheme in 2019, up from 5,640 in 2018. 4,060 of these purchases were in Outer London boroughs and 2,220 were in Inner London. The annualised total of Help to Buy sales fell in the final quarter of 2019, the first fall since 2015.

- The number of Help to Buy equity loan purchases in 2018/19 is equivalent to 21% of the number of new build private completions in London in that year (data on new build completions in 2019 is not yet available – see Chart 2.1 of this report).

- 96% of homes purchased using Help to Buy in London in 2019 were purchased by first-time buyers. The median income of London households buying with Help to Buy was around £65,200 and the average loan value was £170,500.

Source and notes:
- MHCLG Help to Buy equity loan statistics
3.9. London’s housing market generated almost £3.3 billion in Stamp Duty receipts in 2018/19, the lowest in four years but still 39% of the England total.

- In 2018/19 Stamp Duty receipts from purchases of homes in London generated £3.3 billion for the national exchequer, down from the heights of recent years but still far above the long-term average even after adjusting for inflation.

- Over the long term, Stamp Duty receipts in London have increased hugely due to a combination of higher prices and a higher effective tax rate, with Londoners consistently paying higher rates due to the nationally-set thresholds and rates.

- London’s share of the total national receipts fell from a high of 47% in 2015/16 to 39% in 2018/19, partly due to faster price growth and higher transaction levels in other regions.

Source and notes:
- 1996/97 to 2017/18 figures from HMRC UK Stamp Tax statistics
- 1988/89 to 1995/96 from 1999/00 UK Housing Review
- Historic prices have been adjusted for inflation using the official GDP deflators as at March 2019
3.10. Buyers of London property worth over £500,000 would save £15,000 due to the government’s temporary Stamp Duty reduced rates, assuming prices don’t rise in response.

- In July 2020, the government announced a Stamp Duty ‘holiday’ until April 2021, exempting sales at prices up to £500,000 from any Stamp Duty liability. The chart above compares the number of sales in different price bands in London in 2019 with the modelled Stamp Duty saving. The analysis does not reflect the impact of the existing relief for first-time buyers.

- In percentage terms, the biggest impact is on sales at £500,000, which are exempted from the entire Stamp Duty bill of £15,000. More expensive sales still incur a Stamp Duty liability – for example, a sale at £1 million will incur a bill of £28,750 during the holiday and £43,750 after it.

- These calculations all assume no behavioural impacts: in practice, sellers increasing their asking prices is likely to offset at least some of any Stamp Duty saving.

Source and notes:
- GLA analysis of Land Registry Price Paid Data
3.11. Average private rents in London have risen by 43% since 2005, by far the largest increase of any other English region.

- The Office for National Statistics track changes in average private rents at regional level since January 2005, and estimates that between then and June 2020 private rents in London grew 43% in nominal terms. This is by far the largest increase of any English region, although there has been some convergence since 2017, as rents in London have grown more slowly than in other regions.

- The next largest increase is in the South East and the South West, where rents have risen 35% since 2005. The North East and the North West have seen the smallest increases over this period at 20%.

Source and notes:
- ONS, Experimental Index of Private Housing Rental Prices
- The ONS index calculates changes in the rents of both new and existing tenancies, while most other indices cover new rents only.
3.12. 2019 saw a continued improvement in the affordability of private rents in London, when compared to trends in average earnings.

- Between 2005 and 2016 average private rents in London rose by 38%, while average individual earnings rose by just 21%, leading to a worsening in affordability. The so-called ‘unaffordability’ index above is the cumulative change in rents divided by the cumulative change in earnings.

- Since then, rents have been relatively stable in nominal terms, while earnings have increased, bringing affordability back towards where it was at the start of the 2010s.

- In 2019, the rent index increased only slightly (0.5%) while the earnings index increased by 3.3%, closing the gap between the two indices and resulting in a third consecutive year of improvements in affordability.

- The affordability index compares changes in rents to changes in median earnings, but there is little difference if lower or upper quartile earnings are used instead, as the earnings distribution has been quite steady over the period.

Source and notes:
- Rents: ONS Index of Private Rental Housing Prices, April each year to match ASHE data (Jan 2011=100).
- Affordability index: Rent index divided by median weekly earnings.
- The earnings index here is workplace-based and is therefore not comparable to the earnings figures in table 3 of the key statistics.
3.13. London has by far the highest average private sector rents in England, with a typical one-bedroom home costing more than a typical three-bedroom home in other regions.

- In the year to March 2020, the median rent for a privately rented home in London was £1,425 per calendar month, more than twice as high as the median in England as a whole (£700).

- London’s rents are so much higher than those of other regions that the median monthly rent for a one-bedroom home in the capital (£1,204) is almost as high as the national median monthly rent for a home with four bedrooms or more (£1,300).

- It should be noted that the ONS statistics exclude any cases where the tenant receives Housing Benefit. As the average private rent for households on Housing Benefit is below the overall average, excluding these cases is expected to inflate the average reported.

Source and notes:
- Office for National Statistics, Private Rental Market summary statistics
- The ONS figures are based on data collected from open market sources, and exclude any cases where the tenant receives Housing Benefit
3.14. There is significant variation in monthly market rents within London, and within the most expensive boroughs there is substantial difference between the top and bottom of the market.

- The lowest median monthly rent for a two-bedroom home is £1,100 in Bexley and in Havering, while the median rent in Kensington and Chelsea is around two and a half times higher at £2,817.

- Richmond-upon-Thames was the Outer London borough with the highest median private rent for a two-bedroom home (£1,600). Lewisham was the Inner London borough with the lowest median private rent for a two-bedroom home (£1,350).

- 24 boroughs had median monthly rents within £600 of each other (from £1,100 in Bexley and Havering up to £1,710 in Lambeth). Divergence is much greater at the top of the market, with £1,100 separating the median rent in Wandsworth and Kensington and Chelsea.

- Expensive boroughs also tend to have a wider distribution of rents, as shown by the range between the lower and upper quartile figures.

Source and notes:
- Office for National Statistics, Private Rental Market summary statistics
- These figures exclude any cases where the tenant receives Housing Benefit
3.15. The total number of Housing Benefit and Universal Credit recipients in London increased to a high of 953,100 in May 2020 due to a spike caused by the Coronavirus pandemic.

- The number of Housing Benefit recipients in London grew from a low of 586,000 in 2001 to a peak of 851,900 in 2013, before falling to 557,700 in May 2020. 405,100 (73% of the total) recipients were in social housing, while 152,700 (27% of the total) rented privately.

- Some of the fall in the Housing Benefit caseload is due to the widening roll-out of Universal Credit for new claimants. In May 2020, there were 395,400 households in receipt of Universal Credit in London, over double the 162,900 households in receipt of Universal Credit in May 2019. 156,000 (39% of the total) were in social housing, while 239,400 (61% of the total) rented privately.

- Adding together Housing Benefit recipients and households receiving Universal Credit gives a total of 953,100, of which 561,000 (59% of the total) are social housing tenants and 392,100 (41% of the total) are private tenants. The proportion of private tenants in receipt of Universal Credit or Housing Benefit increased significantly in the first half of 2020, from just 34% in January 2020.

Source and notes:
- DWP, Housing Benefit caseload statistics and Stat Xplore
- Housing Benefit recipients are measured in terms of benefit recipients, and Universal Credit recipients in terms of households
3.16. A decade of cuts to Housing Benefit and other welfare reforms have left tenants in London with much less support to pay their rent.

- The last decade has seen a substantial shift in the amount of rent covered by Housing Benefit.
- In 2008/09, 45% of private renters in London said that the Housing Benefit they received covered all of their rent, but by 2018/19 this figure had fallen to just 16%.
- There was a significant but less sharp drop among private renters in the rest of England, from 30% to 18%.
- Social housing tenants have also been affected, with the proportion of those who said Housing Benefits covered their entire rent falling from 48% to 40% in London and 68% to 54% in the rest of England.

Source and notes:
- MHCLG, ‘English Housing Survey 2018 to 2019: housing costs and affordability’
3.17. The typical rent for a two-bedroom social rented home in London is £114 a week, compared to £180 a week for an Affordable Rented home.

- Rents for new general needs social housing tenancies rose substantially between 2007/08 and 2015/16, largely because until recently they were determined by a formula that ensured they rose above inflation. After three years of legislated annual rent reductions, however, median social two-bedroom rents fell and then rose again, and in 2018/19 were 1% lower than in 2015/16.

- When Affordable Rent was introduced by the coalition government, it allowed homes to be let at rents at up to 80% of the equivalent market rent. The average two-bedroom rent in London was £180 a week in 2018/19, 9% lower than in 2017/18.

- This reduction is likely to be due at least in part to the introduction of the Mayor’s new London Affordable Rent product, which sets benchmark rents based on social rent levels. The London Affordable Rent benchmark for a two-bedroom property was £159 a week in 2018/19.

Source and notes:
- MHCLG, Social Housing Lettings in England, CORE summary tables
- Weekly rent excludes supplementary charges such as service and support charges
- The Affordable Rent category includes homes both above and below the London Affordable Rent benchmarks
4. Housing needs

In 2019/20, 10,730 people were seen sleeping rough in London, 21% more people than a year before (4.1). 73% of people seen sleeping rough for the first time in 2019/20 spent only one night on the streets, a proportion which has been broadly unchanged for the past four years (4.2). The number of UK nationals and Central or Eastern European nationals seen sleeping rough in London each increased by 16% compared to 2018/19 (4.3).

Since the introduction of new statutory homelessness duties for local authorities in April 2018, the number of households owed a duty has continued to increase (4.4). The most common reason given for newly homeless households in London losing their last home is that friends or relatives were no longer willing or able to accommodate them (4.5). The number of homeless households living in temporary accommodation in London was 60,720 at the end of March 2020, a 7% increase on March 2019 (4.6).

Around 44% of family-sized homes in London are under-occupied, while a small proportion (6%) of one bedroom homes are overcrowded (4.7). 8.3% of households in London are overcrowded, up from 5.5% at the turn of the millennium, due primarily to an increase in overcrowding among social renting households (4.8). One in five of households with children in London are overcrowded, more than twice the rate in the rest of England (4.9). 39% of home-owning households in London are under-occupying their home, higher than in the mid-1990s but down from the mid-2010s (4.10).
4.1. 10,730 people were seen sleeping rough in London in 2019/20, 21% more than a year before.

The largest group of people seen sleeping rough on London’s streets in 2019/20 were the 7,053 people seen sleeping rough for the first time. This ‘flow’ of new people onto the streets grew by 28% in the last year and has more than quadrupled since 2007/08, although some of this increase is probably due to increased monitoring.

The ‘stock’ figure, which measures the number of people seen sleeping rough two years in a row, increased by 14% in 2019/20 to 2,371, and has more than doubled since 2007/08.

The ‘returner’ figure, which represents those who were last seen sleeping rough more than a year ago, grew by 4% in 2019/20 to 1,302, and has trebled in the last decade.

26% of all people seen sleeping rough in 2019/20 were seen in Westminster. Other boroughs with high numbers of people seen sleeping rough include Camden, Newham, Southwark, Ealing and Lambeth.

Source and notes:
- CHAIN annual reports, 2006/07 to 2019/20
4.2. 73% of people seen sleeping rough for the first time in 2019/20 spent only one night on the streets, a proportion which has been broadly unchanged for the past four years.

- 5,133 people, or 73% of those new to the streets in 2019/20, were seen sleeping rough only once in the year, up from 4,036 in 2018/19 but similar in percentage terms to the last three years.

- 1,920 new rough sleepers were seen more than once in 2019/20 (27% of the total). Of this group, around half were seen just twice.

- 80 people were seen sleeping rough more than ten times, up from 76 in 2018/19 and 65 in 2017/18.

Source and notes:
- CHAIN annual reports, 2008/09 to 2019/20
4.3. The number of UK nationals and Central or Eastern European nationals seen sleeping rough in London each increased by 16% in 2019/20, compared to 2018/19.

- The nationality profile of rough sleepers in London remains diverse, with a total of 131 different nationalities recorded during 2019/20.
- People from the UK accounted for 4,683 of those seen sleeping rough in London in 2019/20, 55% of the total. This is similar to 49% in 2018/19 but lower than the recent peak of 54% in 2017/18.
- The number of people from Central or Eastern European countries seen sleeping rough has increased again after a previous dip, accounting for 34% of those seen in 2019/20, reversing the decline in their numbers between 2015/16 and 2017/18.
- There were also notable increases in 2019/20 in people from the rest of the world, and those whose nationality was not known or recorded, seen rough sleeping.

Source and notes:
- CHAIN annual reports, 2008/09 to 2019/20
4.4. Since the introduction of new statutory homelessness duties for local authorities in April 2018, the number of households owed a duty has continued to increase.

- The Homelessness Reduction Act (HRA) came into force in April 2018, creating new prevention and relief duties for local authorities.
- Under the new Act, a prevention duty is owed to households threatened with homelessness within 56 days and a relief duty is owed to households that are already homeless and require help to secure accommodation. The relief duty also lasts 56 days, after which a household is owed a main homelessness duty and accepted as statutorily homeless.
- There were 13,680 households owed a new prevention or relief duty in Q1 2020, including 7,360 prevention and 6,320 relief duties. This is a 2.2% increase on Q1 2019 and an 8.7% increase from the first HRA data in Q2 2018.
- There were 2,920 households accepted as statutorily homeless by London boroughs in Q1 2020, a 24% increase on Q1 2019 and a 55% increase from the first recorded HRA data in Q2 2018.

Source and notes:
- MHCLG live tables A1 and MD1, from the collection ’Statutory homelessness in England’
- The MHCLG table A1 and MD1 statistics are defined as ‘experimental’ while it continues to work with local authorities to improve the quality of the HRA data
- HRA prevention, relief and main homelessness duties are shown in the chart independently, as opposed to stacked
- Main duty figures are lower than the “equivalent” figures prior to April 2018, as the new HRA process aims to help families into housing before they reach this category
4.5. The most common reason given by newly homeless households in London for losing their last home is that friends or relatives were no longer willing or able to accommodate them.

- When households are accepted as homeless, the reason they lost their last settled accommodation is recorded. Until 2017/18 the reason for loss of last settled home was recorded only for households accepted as being owed a main (original) duty; however, under the HRA reporting, this is also now recorded for the wider group of households who are owed a new prevention or relief duty.

- In 2019/20, 29% of homeless households in London reported losing their last home because friends or relatives were no longer willing or able to accommodate them. This figure is decreasing as reasons contained within ‘other’ increase (33% of homeless households in 2019/20).

- After a sharp increase in the proportion of households owed a homelessness duty because of the end of an Assured Shorthold Tenancy (AST), provisional estimates suggest this figure is coming down again. In 2019/20, 20% of households were owed a homelessness duty because of the end of an AST, which is down from 40% in 2015/16.

Source and notes:
- MHCLG statutory homelessness statistics
4.6. The number of homeless households living in temporary accommodation in London was 60,720 at the end of March 2020, a 7% increase on March 2019.

- At the end of March 2020, there were 60,720 homeless households in temporary accommodation arranged by London boroughs, almost three times the lowest recorded rate in late 1988.
- 21,760 of these households, or 36% of the total, were accommodated outside of their home borough.
- The number of households in bed and breakfast accommodation (3,520) increased 17% in the year to March 2020 and has more than tripled since 2009, although bed and breakfasts still only account for 6% of all temporary accommodation placements.
- 36% of households in temporary accommodation in March 2020 were in accommodation leased from private sector landlords; 36% were in other private sector accommodation; 16% in social housing used as temporary accommodation; and 6% in hostels and women’s refuges.

Source and notes:
- Housing Finance Review 1995/96
- UK Housing Review 2004/05
- MHCLG live table 775
- MHCLG live table TA1
4.7. Around 44% of family-sized homes in London are under-occupied, while a small proportion (6%) of one-bedroom homes are overcrowded.

The ‘bedroom standard’ estimates how many bedrooms a household requires, based on the ages and relationships of the household members. Households lacking at least one bedroom according to this standard are considered overcrowded, and those with at least two ‘spare’ bedrooms are considered to be under-occupying. In practice, a ‘spare’ bedroom may well be occupied or in use.

There are almost 1.8 million occupied family homes in London (those with three bedrooms or more), but around 800,000 of them are under-occupied, including 400,000 that are occupied by one person.

By contrast, according to the bedroom standard there are over 1.6 million households that require just one bedroom, but only 600,000 one-bedroom homes (nearly 100,000 of which are overcrowded).

Source and notes:
- English Housing Survey 2016/17 to 2018/19
4.8. 8.3% of households in London are overcrowded, up from 5.5% at the turn of the millennium, due primarily to an increase in overcrowding among social renting households.

- In 2018/19, 8.3% of households in London were estimated to be overcrowded according to the ‘bedroom standard’, which compares the size and composition of households to the bedrooms available.
- The overall overcrowding rate is above its level in the 1980s and 1990s, primarily due to rising overcrowding in social housing, with overcrowding in private renting following a more cyclical pattern. The proportion of overcrowded homeowner households has declined slightly over the same period.
- 15% of households in social housing, 13% of those in private rented housing, and 2.7% of homeowners were overcrowded.

Source and notes:
- 1986/87 data from the London Housing Survey
- 1995/96 to 2018/19 data from the Survey of English Housing and English Housing Survey data, using three-year rolling averages
- 2006 definition of bedroom standard and rolling three year averages used
4.9. One in five of households with children in London live in overcrowded housing, more than twice the rate in the rest of England.

- Rates of overcrowding are higher in London than anywhere else in the country, and households with children are particularly likely to be affected.

- 20% of all households with children in London are considered to be overcrowded according to the bedroom standard measure, compared to 8% in the rest of England.

- Overcrowding rates in London are particularly high in the private rented sector, where 35% of households with children are overcrowded, and in social housing where 27% of households with children are overcrowded.

Source and notes:

- *English Housing Survey, 2016/17 to 2018/19*

- *This chart replaces a version in the 2019 report which estimated the number of children living in overcrowded conditions, but which used restricted data that is not currently available for 2018/19*
4.10. 39% of home-owning households in London are under-occupying their homes, higher than in the mid-1990s but down from the mid-2010s.

- Over the last two decades the proportion of households that are under-occupying their home in London has remained steady at around a quarter.

- However, this stability has masked increasing differences at the level of individual tenures. There has been a notable increase in the proportion of homeowner households who are under-occupying, from 33% in the mid-1990s to 39% in the three years ending 2018/19.

- Meanwhile, 6.6% of social rented households and 9.1% of private rented households are currently under-occupying. Both figures have been fairly stable since the mid-1990s.

Source and notes:
- Survey of English Housing and English Housing Survey data, 1993/94 to 2018/19 (rolling three-year average)

- Under-occupation is defined as a household having two or more bedrooms than the Government recommended bedroom standard indicates they require
5. Mobility and decent homes

11% of all London households and 27% of private renting households have lived in their current home for less than a year (5.1). Almost two thirds of all moves in London in the last three years were households moving from one private rented sector home into another (5.2). The number of households moving into social housing each year in London has fallen by over two thirds since the mid-1990s (5.3). Many moves in London's private rented sector are relatively local, with a quarter of tenants moving within a mile of their previous home (5.4). The Mayor’s Housing Moves programme enabled 172 social housing tenants to move between boroughs in 2019/20, double the number of moves in 2018/19 (5.5). Almost 2,300 social rented homes in London have been freed up through the Seaside and Country Homes scheme since 2007/08 (5.6).

While the proportion of non-decent homes has fallen in each tenure since 2006, most of this improvement came in the first five years of this period (5.7). The number of affordable homes in London below the Decent Homes standard fell from 260,290 in 2005 to 41,430 in 2016 and has remained at roughly that level since (5.8). In June 2020 there were 232 high-rise residential buildings identified in London with Aluminium Composite Material (ACM) cladding systems unlikely to meet Building Regulations, more than half of the England total (5.9).

Per capita greenhouse gas emissions from London’s housing stock have fallen by over two fifths in the last decade, but were higher than emissions from workplaces and transport in 2017 (5.10). The most energy efficient homes in London are found in high-density areas with many recently built homes, while the least energy efficient tend to be in low-density outer suburbs (5.11). The energy efficiency of new dwellings in London far out-performs existing dwellings, but few of them achieve the highest rating (5.12). Progress in improving the energy efficiency of existing homes has picked up again after slowing in recent years (5.13).

11% of households in London were estimated to be living in fuel poverty in 2018, above the national average (5.14), although the rate of fuel poverty in social housing is similar in London to the national average, and in private rented housing is lower (5.15).
5.1. 11% of all London households and 27% of private renting households have lived in their current home for less than a year.

- 11% of households in London moved to a new home in the last year (including those moving to London from elsewhere), while 61% have lived more than five years at their current home, 44% more than ten years, and 25% more than 20 years.
- Mobility is far higher in the private rented sector, where 27% of households moved in the last year. This compares to just 5% of social renting households and 3% 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.

Source and notes:
- English Housing Survey, 2016/17 to 2018/19 average
5.2. 70% of all moves in London in the last three years were households moving from one private rented sector home into another

- 10% of households in London moved in the last year (including those who moved to London from elsewhere), and 84% of those moves were either into or within the private rented sector. 70% were moves from one private rented home to another.

- Newly forming households accounted for 14% of moves, 10% of which were into the private rented sector, 2% into owner occupation and 2% into social housing.

- 15% of all moves were into or within owner occupation, of which 6% comprised owner occupiers moving within the tenure, while 7% were households moving from the private rented sector.

- 12% of moves were into or within social housing, most of which (8%) were within-tenure moves.

Source and notes:
- English Housing Survey, 2016/17 to 2018/19 average
- Data shows the proportion of households moving in the last year, as an average of measures taken in 2016/17, 2017/18 and 2018/19
5.3. The number of households moving into social housing each year in London has fallen by over two thirds since the mid-1990s.

- In 2018/19 15,130 households new to social housing moved into council or housing association homes in London, a figure that has fallen from 49,800 in 1996/97.

- 9,565 of these lettings were to new council tenants and 5,565 to housing association tenants.

- The number of council lettings to new tenants has fallen from 40,500 in 1996/97, partly due to the shrinking of the council housing stock over the same period.

- The number of housing association lettings to new tenants fell from 9,300 to 5,565 over the same period, with a growing stock failing to compensate for a falling letting rate.

Source and notes:
- UK Housing Review, various years
- 2018/19 housing association figure estimated from MHCLG’s social housing lettings tables
- Before 2010/11 the local authority figures include a small number of tenants transferring from housing association homes
5.4. Many moves in London's private rented sector are relatively local, with a quarter of tenants moving within a mile of their previous home.

- An analysis of anonymised tenant referencing data by Dataloft for the GLA reveals that a high proportion of moves in London's private rented sector are very local. 24% of tenants move from less than a mile away, another 14% from 1-2 miles away and another 20% from 2-5 miles.

- The pattern of distances moved by those moving into new build rental homes is quite similar, with a slightly smaller proportion coming from the local area (20% from within 1 mile and another 10% from within 1-2 miles) and a higher proportion coming from overseas (15% compared to 9% of all moves).

Source and notes:
- Dataloft analysis for the GLA
5.5. The Mayor’s Housing Moves programme enabled 172 social housing tenants to move between boroughs in 2019/20, double the number of moves in 2018/19

- The Mayor’s Housing Moves programme offers social housing tenants in London the opportunity to move to suitable accommodation in another borough. The programme enabled 172 social housing tenants to move between boroughs in 2019/20, up from 84 in 2018/19.

- The programme prioritises applicants who fall into certain categories. Households in work or training comprise the majority of those moving, accounting for 69% of moves in 2019/20 (119 moves in total), of which around two thirds were overcrowded before the move. Eight under-occupying households also moved.

- In 2019, two new pilot pathways were launched to give greater priority to former rough sleepers ready to move on from supported accommodation and to social housing tenants who needed to move home due to domestic abuse. 21 of the housing moves in 2019/20 were made by tenants in these groups.

Source and notes:
- GLA Housing Moves programme monitoring data
5.6. Almost 2,300 social rented homes in London have been freed up through the Seaside and Country Homes scheme since 2007/08

- Between 2007/08 and 2019/20 there were 2,284 social rented homes freed up in London after the tenants moved out through the Seaside and Country Homes scheme, which helps older council and housing association tenants in London move to a home outside London.

- The borough that has had the most homes freed up is Greenwich (207), followed by Barking and Dagenham (159) and Southwark (158). The City of London (with five), Brent (ten) and Kensington and Chelsea (ten) have had the least homes freed up.

Source and notes:
- GLA, Seaside and Country Homes programme monitoring data
5.7. While the proportion of non-decent homes has fallen in each tenure since 2006, most of this improvement came in the first five years of this period.

- The proportion of homes below the official Decent Homes standard in London has fallen significantly in each tenure between 2006 and 2018; from 41% to 20% for privately rented homes, 37% to 10% for social rented homes, and 36% to 15% for owner occupied homes. Across all tenures, 37% of homes were below the standard in 2006 and 15% in 2018.

- However, in each tenure most of these improvements came in the first five years, when the overall figure fell from 37% to 22%.

- The higher proportion of homes below the standard in the private rented sector is likely to reflect in part the older mix of housing in the sector.

Source and notes:
- Survey of English Housing data 2006 to 2007 and English Housing Survey stock data 2008 to 2018
- Confidence intervals are not shown for reasons of legibility, but are plus/minus 3% or 4% for each of the main tenures throughout most of the period.
5.8. The estimated number of affordable homes in London below the Decent Homes standard fell from 260,290 in 2005 to 41,430 in 2016 and has remained at roughly that level since

- In April 2019, there were estimated to be 40,190 council or housing association owned homes in London below the Decent Homes standard. This is down 3.8% from 41,780 in 2018 and the lowest number of homes below the Decent Homes standard recorded since 2005.

- Between 2005 and 2017, the number of non-decent housing association homes fell from 48,520 to 1,357. However, the number of non-decent housing association homes then more than doubled to 3,480 in 2018, and remained at a similar level (3,466) in 2019.

- The number of non-decent council homes fell from 211,800 in 2005 to an all-time low of 36,730 in 2019, after an increase in 2017.

Source and notes:
- Council data from Business Plan Statistical Appendix and Local Authority Housing Statistics data published by MHCLG
- Housing association data from Regulatory Statistical Return data published by the Tenant Services Authority and Statistical Data Return published by the Regulator of Social Housing
5.9. In June 2020, there were 232 high-rise residential buildings identified in London with ACM cladding systems unlikely to meet Building Regulations, more than half of the England total.

- 77 of the buildings identified for remediation in London were owned by social housing landlords, 144 were private housing blocks and another 11 were student blocks.
- As of the end of July 2020, cladding remediation works had been completed on 50 housing blocks in London (22% of the total), over half of which were social housing blocks, while remediation works had started on another 99 housing blocks (a further 43% of the total).
- Remediation of buildings owned by social housing landlords was further progressed than buildings owned by private landlords, with cladding remediation works completed on 35% of buildings owned by social housing landlords and 13% of buildings owned by private landlords.

Source and notes:
MHCLG, Building Safety Data Release July 2020
5.10. Per capita greenhouse gas emissions from London’s housing stock have fallen by over two fifths in the last decade, but were higher than emissions from workplaces and transport in 2017.

- The GLA’s London Energy and Greenhouse Gas Inventory (LEGGI) measures greenhouse gas emissions from London’s workplaces, homes and transport.
- Per capita emissions of greenhouse gases from London’s homes were 1.3 tonnes in 2017, unchanged from 1.3 in 2016 but 41% lower than the 2007 measure of 2.2 tonnes.
- Per capita emissions from workplaces have fallen even faster and have halved in the last decade, from 2.6 tonnes in 2007 to 1.2 tonnes in 2017.
- Transport emissions per Londoner are lower than emissions from homes and workplaces, but have fallen less in recent years, fluctuating around 1.0 tonnes per capita.
- Total greenhouse gas emissions in London have reduced by two fifths since the beginning of 2000, from 50 megatonnes in 2000 to 30 megatonnes in 2017.

Source and notes:
- GLA London Energy and Greenhouse Gas Inventory 2017 (Table 2.0)
- LEGGI 2017 figures are interim
- Emissions prior to 2009 were measured in megatonnes of carbon dioxide. From 2010 onwards emissions are measured in megatonnes of carbon dioxide equivalent.
5.11. The most energy efficient homes in London are found in high-density areas with many recently built homes, while the least energy efficient tend to be in low-density outer suburbs.

- Every home must have an Energy Performance Certificate (EPC) when built, sold or let. This map shows the median energy efficiency rating (defined as the energy required for space heating, water heating and lighting, multiplied by fuel costs) of the current housing stock in each ward in London as measured by the EPCs registered in 2019, excluding new build homes.

- According to this measure the most energy efficient homes are typically found in high-density areas with many new recently built homes. The highest rating is in Canary Wharf in Tower Hamlets where the typical home has an energy efficiency rating of 81 out of 100. The lowest is in Longlands in Bexley where the typical rating is 57 out of 100.

Source and notes:
- GLA analysis of Energy Performance Certificate data from OpenDataCommunities
5.12. The energy efficiency of new dwellings in London far out-performs existing dwellings, but few of them achieve the highest rating

- According to data from Energy Performance Certificates (EPCs), 96% of new build dwellings in London in 2019/20 were in energy efficiency bands A to C, with homes in band B accounting for the largest proportion (82%). 1.3% achieved an A rating.

- 4% of new build dwellings in London were in bands D or E (with E being the minimum legal level of energy efficiency for privately rented property in England). Just 15 new build homes in London in 2018/19 were registered in bands F or G.

- The majority of existing dwellings in London with EPCs lodged in 2019/20 had a rating of C (39%) or D (44%). A further 11% of existing dwellings had an EPC rating of E and 1.5% were in EPC bands F or G.

- 4% of existing dwellings with EPCs lodged in 2019/20 had an EPC rating of B and only 11 homes were in band A.

Source and notes:
- MHCLG, Live tables on Energy Performance of Buildings Certificates
5.13. Progress in improving the energy efficiency of existing homes has picked up again after slowing in recent years

The energy efficiency of housing can also be measured by the Standard Assessment Procedure (SAP), which gives ratings in percentage terms (with 100% representing zero energy cost). This chart tracks these ratings since 1996 for all homes in London and for each of the three main tenures.

- The median rating for all homes in London was 65% in 2018, up from 48% in 1996 and 64% in 2017.
- Social housing is the most energy efficient tenure, with a typical rating of 69% in 2017. Owner occupied and privately rented homes had median SAP ratings of 63% and 66% respectively in 2018.
- The last year saw renewed improvements in energy efficiency, after a period of stagnation since 2013.

Source and notes:
- English House Condition Survey and English Housing Survey stock data, 1996 to 2018
- This analysis uses the 2012 SAP definition throughout, and refers to all dwellings including empty homes
5.14. 11% of households in London were estimated to be living in fuel poverty in 2018, above the national average…

- 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 (and after taking housing costs into account).

- According to this definition, 11% of households in London were fuel poor in 2018, a figure that had risen each year from 8.5% in 2012, but fell slightly between 2017 and 2018. The causes of the recent increase in fuel poverty rates in London are not clear, but could include changes in income (including benefits), fuel costs or energy efficiency.

- The proportion of households in London that were fuel poor in 2018 is above the national rate for the second consecutive year. In England, 10% of households are estimated to be in fuel poverty, the lowest level recorded for England since 2003.

Source and notes:
- Department for Business, Energy and Industrial Strategy, Fuel poverty statistics
- Fuel poverty is measured according to the ‘low income high costs, after housing costs (AHC), equivalised income’ definition
5.15. … although the rate of fuel poverty in social housing is similar in London to the national average, and in private rented housing is lower

- When the headline rate of fuel poverty is broken down by tenure or landlord, there are similar rates of fuel poverty in London and England in each tenure, with all differences within standard margins of error.

- 14% of households renting on the open market in London in 2018 were fuel poor, compared to around 18% of those across England as a whole. The London figure is down slightly from 17% in 2017, although the change is not statistically significant due to the relatively small samples involved.

- 11% of owner occupiers in London in 2018 were fuel poor, compared to just 8% of owner occupiers at the national level.

- London households living in local authority and housing association housing in London had by far the lowest rate of fuel poverty, at 9% each (very similar to the national averages).

Source and notes:
- English Housing Survey fuel poverty data
- Fuel poverty measure used: Low income high costs (to match the Annual Fuel Poverty Statistics report) with 95% confidence intervals
6. The impacts of Coronavirus

The onset of the Coronavirus pandemic highlighted and exacerbated existing inequalities in London’s housing market, including stark differences in the prevalence of housing problems between Londoners of different ethnicities (6.1). Private renters in London have far fewer financial assets than homeowners to cover a loss of income associated with loss of employment income (6.2). And households in London are less likely to have access to a private or shared garden than households in the rest of England, but are more likely to live close to a park (6.3).

The pandemic and associated lockdown had profound impacts on the housing market. The flow of new rental and sales listings in London fell initially during lockdown, but has since recovered to levels exceeding the fortnight leading up to 24th March (6.4). London’s sales market was stronger than the national average immediately prior to lockdown, but has so far recovered more weakly from the crisis (6.5). Several indicators suggest that average private rents in London dipped in the second quarter of 2020 (6.6), perhaps related to the fact that the number of properties in London listed on Airbnb with a recent review collapsed after lockdown measures were announced (6.7).

The crisis also affected housing supply. The number of homes on planning applications submitted in London in the first half of 2020 is subdued compared with the same period in the past four years (6.8). Housebuilding in London, as measured by the weekly number of Energy Performance Certificates for new dwellings, fell during lockdown but has since recovered to roughly its previous level (6.9).

London’s construction workforce is distinctive due to its high rates of self-employment and heavy use of public transport to get to work (6.10). As of 30 June, 55% of all eligible construction roles in London had been placed on furlough at some point (6.11). London had around 1.2 million key workers in 2019, the majority of whom lived in an owner occupied home either with or without a mortgage (6.12).

The number of mortgage and landlord claims for home repossession in London courts fell sharply during lockdown (6.13), but a quarter of privately renting adults in London said in July that they had either fallen behind on their rent or that they were likely to do so soon (6.14). The number of people seen sleeping rough for the first time in London between April and June 2020 was 77% higher than in the same period in 2019 (6.15). In late May there were nearly 1,400 homeless people staying in emergency hotel accommodation arranged by the GLA due to the pandemic (6.16).
6.1. Before the onset of the Coronavirus pandemic, there were stark differences in rates of housing problems between Londoners of different ethnicities

- London’s housing challenges do not affect all Londoners equally, with ethnicity being one important dimension of inequality. The most extreme difference is in experiences of homelessness, with Black ethnic households being twice as likely as the average London household to be assessed as owed a homelessness duty, while White households are only half as likely.

- Black and Asian households are also much more likely to live in housing that is overcrowded, while Black households experience higher rates of damp problems at home, and Asian households are slightly more likely to live in non-decent homes. Black households are twice as likely to be dissatisfied with their housing.

- These are broad patterns, and there can also be differences within ethnicity groups, for example between White households from Britain and those from other parts of Europe.

Source and notes:
- GLA analysis of English Housing Survey data, 2015/16 to 2017/18, and of MHCLG homelessness statistics March 2019
- Households are classified according to the ethnicity of the household head, but ethnicity can also vary within households
6.2. Private renters in London have far fewer financial assets than homeowners to cover a loss of income associated with loss of employment income

- Private renters in London, even those in work, have far less of a financial cushion to cope with losses of employment income than homeowners. 22% of them don’t have enough financial assets to cover a 20% loss in income for even one month, compared to 2% of outright owners and 5% of homeowners with a mortgage.

- 36% of private renters don’t have enough financial assets to cover a loss of 20% of monthly income over three months, compared to 16% of homeowners with a mortgage. The vast majority of outright owners would still be insulated from such a shock, with only 5% not having enough assets to cover the loss.

Source and notes:
- ONS Financial resilience of households by household type, standard industrial classification, region and main house tenure: Wealth and Assets Survey, Great Britain, April 2016 to March 2018
6.3. Households in London are less likely to have access to a private or shared garden than households in the rest of England, but are more likely to live close to a park.

- 21% of households in London had no access to a private or shared garden during the Coronavirus lockdown, compared to 10% in the rest of England.

- However, 45% of Londoners live within a five-minute walk (300 metres as the crow flies) of a public park, compared to 24% of those in the rest of England.

- At local authority level, Tower Hamlets had both the lowest share of households with private outside space (60%) and the highest share within five minutes of a park (78%) of any local authority in England.

**Source and notes:**
- ONS, ‘One in eight British households has no garden’, 2020
- Uses Ordnance Survey data
- Chart excludes City of London and Isles of Scilly due to their small size.
6.4. The flow of new rental and sales listings in London fell initially during lockdown, but has recovered to levels exceeding the fortnight leading up to 24th March.

- In the fortnight leading up to March 24th, when concern was mounting over Coronavirus but legal restrictions had not been imposed, there were just over 15,000 properties for rent and 5,000 for sale added to the Rightmove portal in the London postcodes area.

- During lockdown, the number of rental listings added each fortnight fell about a third, while the number of sale listings fell over 80%. Since then, both have recovered to well above their mid-March levels.

- Since mid-June, the flow of rental listings has steadied at around 25,000 a fortnight, while the flow of sales listings continued to increase, reaching 10,000 in mid-August.

Source and notes:
- Data compiled by GLA from public Rightmove portal
- The London area referred to covers only the London postcode districts (excluding those starting with ‘CR’, ‘BR’ etc)
6.5. London’s sales market was stronger than the national average immediately prior to lockdown, but has so far recovered more weakly from the crisis.

- According to the RICS monthly housing market survey, London’s housing market was performing relatively strongly immediately before the lockdown, with demand growing faster than supply, and both prices and sales expected to increase in the coming months.

- The effect of lockdown was similar across the country, with sales and prices falling. However, since the lockdown was lifted, London’s market has recovered more slowly than the national average, with demand growing more slowly than supply and most surveyors reporting price falls.

- In July 2020, RICS survey respondents in London reported 12 sales per surveyor, higher than the sales rate in April, May and June 2020 but still low by historic standards.

Source and notes:
RICS, Residential Market Survey
6.6. Several rental market indicators suggest that average private rents in London dipped in the second quarter of 2020.

![Quarterly change in private rent indicators, London, 2015 to 2020](chart)

- The official ONS index of private rents provides estimates of changes in the rent levels of all privately rented properties, not just newly let or advertised ones, and as a result tends to respond fairly slowly to sudden changes in market condition.

- This chart therefore compares several more responsive measures of rental market conditions, all on a quarterly basis: the balance of demand and supply reported by RICS surveyors, the annual change in Rightmove’s asking rents index, the annual change in Zoopla’s index and the estimated annual change in Homelet’s monthly index of achieved rents after being aggregated to quarters.

- Each of these measures shows a fall or at least a slowdown in rents in the first two quarters of 2020, suggesting that the ONS index will eventually show a drop in rents in London in 2020.

Source and notes:
- GLA analysis of data from RICS, Homelet, Zoopla and Rightmove
- Monthly Homelet data has been averaged over quarters to align with the other three quarterly sources
- The data should be seen as indicative, so the trends have been smoothed
6.7. The number of properties in London listed on Airbnb with a recent review collapsed in April, after lockdown measures were announced.

- From early 2018 to early 2020, the number of Airbnb listings in London that had received a review in the last month averaged around 20,000 at any given time. The total number of listings in London is far higher but many of them are either inactive or are not regularly rented out.

- After lockdown was imposed in late March, the number of listings with a recent review collapsed, to just under 6,000 in mid-April and then around a thousand in May and June, before partially recovering to almost 5,000 in late August.

- Roughly half of the active listings before lockdown comprised entire homes, implying that up to 10,000 homes may have become available for long-term renting as a result of the lockdown.

Source and notes:
- Data extracted from Inside Airbnb
- Active listings are defined as listings that received at least one review in the previous month
The number of homes on planning applications submitted in London in the first half of 2020 is subdued compared with the same period in the past four years.

- The research firm Molior monitor planning applications for schemes in London with at least 20 market units. While this data is subject to revision, the number of homes on planning applications submitted for schemes in London shows the effect of the Coronavirus pandemic.

- In the first seven months of 2020, the number of homes on planning applications submitted in London was subdued compared to the same period in previous years, falling from almost 7,000 in February (roughly average compared to previous years) to just under 4,000 in April.

- Applications increased in June but fell again in July, to below the level seen at the same time in any of the previous three years.

Source and notes:
- Molior London database
Housebuilding in London, as measured by the weekly number of Energy Performance Certificates for new dwellings, fell during lockdown but recovered to roughly its previous level.

New, experimental data published by MHCLG shows the weekly number of Energy Performance Certificates (EPCs) for new dwellings registered in each region. According to these figures, the number of new homes completed fell sharply in every region during lockdown, although by less in London than in other regions - from around 3,000 completions in a typical four-week period to around 1,000.

Since then each region has seen a broadly similar recovery to around its pre-lockdown level of completions, with only the West Midlands showing signs of exceeding this level as of mid-August.

Compared to the pre-lockdown trend there was a loss of around 5,000 completions in London during late March and mid-June. Weekly completions have yet to rise above their pre-lockdown levels in any region, and have stabilised slightly below those levels in London and other southern regions, indicating that it will take some time to make up for the ‘lost’ supply.

Source and notes:
- MHCLG, experimental Energy Performance Certificate statistics
6.10. The resilience of the construction workforce is affected by high rates of self-employment and, in London, heavy use of public transport to get to work.

- Just prior to the onset of the Coronavirus pandemic, 39% of London’s 350,000 construction workers were self-employed, compared to 16% of workers in other sectors. A similar proportion of construction workers in the rest of the country are self-employed.

- Around 50% of London’s construction workers used public transport to get to work before the crisis - slightly less than the 60% in other sectors but far more than in the rest of the country, where just 3% of those in construction travelled to work by public transport.

Source and notes:
- Labour Force Survey (person dataset), Q4 2019
6.11. As of 30 June, 55% of all eligible construction roles in London had been placed on furlough at some point.

- The Coronavirus Job Retention Scheme (CJRS) allowed employers to claim financial support of up to 80% of salary (up to a maximum £2,500 per month) for each furloughed employee from early March.

- As of 30 June, 1.29 million or 30% of all eligible roles in London had been placed on furlough (the same number as in England as a whole) at some point. This figure rose to 55% of construction employment, second only to the arts, entertainment and recreation sector.

- Construction workers in London also had a high rate of claims to the self-employment income support scheme, with 79% of potentially eligible workers making a claim at some point.

Source and notes:
- HMRC, Coronavirus Job Retention Scheme and Self-Employment Income Support Scheme statistics, July 2020
- The figures represent the total take-up over the course of the scheme, rather than a snapshot at a particular point in time.
6.12. London has around 1.2 million key workers in 2019, the majority of whom live in an owner occupied home either with or without a mortgage.

Based on the categorisation used by the Institute for Fiscal Studies, London had around 1.2 million key workers in 2019, split between just over 500,000 in the public sector and nearly 700,000 in the private sector.

In broad terms, key workers live in the different housing tenures at similar rates to other workers in London, but there are some important differences. Notably, private sector key workers are less likely to own their home and more likely to live in social housing than either public sector key workers or other workers.

**Source and notes:**
- Labour Force Survey (person dataset), Q4 2019
6.13. The number of mortgage and landlord claims for home repossession in London courts fell sharply during lockdown …

- As a result of FCA announcements and the passing of the Coronavirus Act in March 2020, mortgage and landlord repossession claims fell sharply in London courts (as in other regions) between March and June.

- There were just nine mortgage possession claims in June (compared to 312 in February), 115 claims by social landlords (compared to 975), 159 by private landlords (compared to 537) and another 119 (down from 538) through the ‘accelerated landlord’ channel, mostly used by private landlords.

- Any possession claims still registered in the system during this time may not be progressed until the lifting of the stay on repossessions.

- As was the case before the pandemic, it is likely that not all claims will progress to actual possessions.

Source and notes:
- Data provided by Ministry of Justice, and consistent with information published in its Q2 2020 possession statistics
- Data for April to June 2020 is provisional and may be revised. Claims are allocated to London on the basis of the location of the court, so may include some claims for properties outside the London area
6.14. … but a quarter of privately renting adults in London said in July that they had either fallen behind on their rent or that they were likely to do so soon.

In a survey carried out by YouGov in July 2020, 9% of private renters in London said they had fallen behind on some or all of their rent since the start of lockdown, and a further 17% said they were likely to fall behind soon.

Social housing tenants were more likely to report already being in arrears but were less worried about falling behind in future. 11% said they had fallen behind on some or all of their rent, while 7% said they were likely to fall behind soon.

Source and notes:
- YouGov survey for the GLA
- Total sample size was 1,082 adults in London, including 259 private tenants and 148 social housing tenants. Fieldwork was undertaken between 28th - 31st July 2020. The survey was carried out online. The figures have been weighted and are representative of all GB adults (aged 18+).
6.15. The number of people seen sleeping rough for the first time in London between April and June 2020 was 77% higher than in the same period in 2019.

- Between April and June 2020 outreach teams recorded 2,680 people sleeping rough in London for the first time, a 77% increase from the same period in 2019. Of these, 2,158 (81%) people spent just one night sleeping rough, while 39 were subsequently seen enough to be considered living on the streets.

- 1,322 people were considered ‘intermittently’ sleeping rough in London between April and June 2020, similar to the same period in 2019.

- By contrast, the number of people considered to be living on the streets fell by a third between 2019 and 2020, largely as a result of efforts to get people into Coronavirus emergency accommodation.

Source and notes:
- CHAIN quarterly report, April to June 2020
6.16. In late May, there were nearly 1,400 homeless people staying in emergency hotel accommodation arranged by the GLA due to the pandemic.

- In mid-March, the GLA began an emergency programme to block-book hotel accommodation for homeless people who would otherwise have been at severe risk of Coronavirus infection from living in shared shelters or on the streets.

- Within two weeks nearly 1,000 people had been moved into hotel accommodation, with a peak of around 1,340 in mid-May. Numbers have fallen since then, as the Mayor’s services focus on securing positive outcomes such as moves into supported and private rented accommodation, for those who have accessed the hotels. In total around 1,700 people were helped through the GLA hotels programme at some point.

- At the same time, London boroughs also obtained emergency accommodation via hotels and other Coronavirus-secure options, and over the same period have helped around 4,000 people.

Source and notes:
- GLA data
Appendices

A1. Discontinued charts
A2. Glossary of acronyms
A3. Sources of data on housing supply
A1. Discontinued charts

Some charts from previous editions have not been included in this edition of Housing in London. In some cases, this was because there were multiple charts on a specific topic. In other cases, for charts highlighted in grey, charts have been replaced with data on a similar and more relevant topic. Finally, some charts have been removed as the data included has not been updated in the last year, for example because it uses 2011 Census data.

Below is a list of the charts in Housing in London 2019 which have been discontinued in Housing in London 2020. The tables in the 2019 report can be found on the Housing in London webpage https://data.london.gov.uk/dataset/housing-london using the below index numbers.

Table 5: Charts in Housing in London 2019 discontinued in Housing in London 2020

<table>
<thead>
<tr>
<th>Chart</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>1.2</td>
<td>Estimated numbers of dwellings and households in Greater London, 1901 to 2018</td>
</tr>
<tr>
<td>1.7</td>
<td>Annualised gross new homes built and net change in dwelling stock in London, by decade, 1961 to 2018</td>
</tr>
<tr>
<td>1.8</td>
<td>London Plan capacities and net completions, 1997 to 2028</td>
</tr>
<tr>
<td>1.9</td>
<td>Proportion of respondents (in Britain and in London only) identifying housing as one of the most important issues facing the country</td>
</tr>
<tr>
<td>2.1</td>
<td>Population change by decade in London and Outer Metropolitan Area, 1811 to 2021</td>
</tr>
<tr>
<td>2.2</td>
<td>Components of London’s population change, 1996 to 2018</td>
</tr>
<tr>
<td>2.4</td>
<td>Share of people aged 20-34 living with their parents, London and UK 1996-98 to 2016-18</td>
</tr>
<tr>
<td>2.8</td>
<td>Median property wealth, by total household net equivalised income decile, London, 2010 to 2014/16</td>
</tr>
<tr>
<td>2.9</td>
<td>Non-UK nationals as a share of home building workforce by region and country, 2017</td>
</tr>
<tr>
<td>3.4</td>
<td>Annualised new house building starts in London by type of provider, 2000 to 2019</td>
</tr>
<tr>
<td>3.5</td>
<td>Percentage increase in housing stock by local authority, 2008 to 2019</td>
</tr>
<tr>
<td>3.9</td>
<td>Mean floor area by dwelling age, London and England</td>
</tr>
<tr>
<td>3.10</td>
<td>Percentage of new build houses sold on a leasehold, London and England, 1998 to 2018</td>
</tr>
<tr>
<td>3.14</td>
<td>Estimated number of homes in each London borough that could be provided by tall buildings in the pipeline, 2019</td>
</tr>
<tr>
<td>Chart</td>
<td>Description</td>
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</tr>
<tr>
<td>3.16</td>
<td>Number of community-led housing projects by London borough, August 2019</td>
</tr>
<tr>
<td>3.20</td>
<td>Conversions of social rent homes to Affordable Rent compared to starts of social rent and Affordable Rent homes, London 2011/12 to 2018/19</td>
</tr>
<tr>
<td>3.24</td>
<td>Number of dwellings recorded as second homes for council tax purposes, 2018</td>
</tr>
<tr>
<td>4.2</td>
<td>Estimated income distribution of recently moving households in London by tenure</td>
</tr>
<tr>
<td>4.4</td>
<td>Ratio of London and wider South East average house prices to UK average, 1974 to 2019</td>
</tr>
<tr>
<td>4.11</td>
<td>Court orders for mortgage repossession in London, 1980 to 2018 (with actual repossessions from 2003)</td>
</tr>
<tr>
<td>4.13</td>
<td>Estimated number of properties listed on Airbnb in London by type, December 2013 to March 2019</td>
</tr>
<tr>
<td>4.15</td>
<td>Quarterly change in nominal rent and leading indicators for rental growth, London, 2010 to 2020</td>
</tr>
<tr>
<td>4.20</td>
<td>Change in private rent Housing Benefit and Universal Credit caseload by London Middle Super Output Area, April 2018 to February 2019</td>
</tr>
<tr>
<td>5.4</td>
<td>Support needs of rough sleepers in London, 2018/19</td>
</tr>
<tr>
<td>5.7</td>
<td>Homelessness prevention and relief in London, 2009/10 to 2018/19</td>
</tr>
<tr>
<td>5.9</td>
<td>Households leaving temporary accommodation, London, 1998/99 to 2017/18</td>
</tr>
<tr>
<td>6.2</td>
<td>Proportion of households in London who lived less than a year at current address by tenure, 1995 to 2018</td>
</tr>
<tr>
<td>6.5</td>
<td>Reasons for moving: households moving / forming in the last two years, by previous tenure, 2014/15 to 2016/17</td>
</tr>
<tr>
<td>6.11</td>
<td>Trend in proportion of non-decent homes in London and rest of England, 2006 to 2017</td>
</tr>
<tr>
<td>6.14</td>
<td>Fires in homes recorded by London Fire Brigade in 2018</td>
</tr>
</tbody>
</table>
### A2. Glossary of acronyms

**Table 6: Glossary of acronyms used in Housing in London 2020**

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Full word / phrase</th>
</tr>
</thead>
<tbody>
<tr>
<td>BTR</td>
<td>Build to Rent</td>
</tr>
<tr>
<td>CPI</td>
<td>Consumer Price Inflation</td>
</tr>
<tr>
<td>EPC</td>
<td>Energy Performance Certificate</td>
</tr>
<tr>
<td>GLA</td>
<td>Greater London Authority</td>
</tr>
<tr>
<td>HMO</td>
<td>House in Multiple Occupation</td>
</tr>
<tr>
<td>HRA</td>
<td>Homelessness Reduction Act</td>
</tr>
<tr>
<td>LAR</td>
<td>London Affordable Rent</td>
</tr>
<tr>
<td>LDD</td>
<td>London Development Database</td>
</tr>
<tr>
<td>LEGGI</td>
<td>London Energy and Greenhouse Gas Inventory</td>
</tr>
<tr>
<td>MHCLG</td>
<td>Ministry of Housing, Communities and Local Government</td>
</tr>
<tr>
<td>NHBC</td>
<td>National Housebuilding Council</td>
</tr>
<tr>
<td>ONS</td>
<td>Office for National Statistics</td>
</tr>
<tr>
<td>RTB</td>
<td>Right to Buy</td>
</tr>
<tr>
<td>UKHPI</td>
<td>UK House Price Index</td>
</tr>
</tbody>
</table>
A3. Sources of data on housing supply

Introduction

This note sets out the two main measures of housing supply used by the GLA, reflecting data gathered for the purposes of monitoring planning decisions and affordable housing funding programmes.

Planning data

The housing provision targets set out in the current London Plan are defined in terms of total net housing supply, comprising three components:

- Conventional completions: self-contained homes from new build, conversion or change of use;
- Non-conventional completions: non-self-contained housing such as bedrooms in hostels or halls of residence; and
- Change in long-term empty homes (those empty for more than six months), where a decrease is an addition to supply and an increase is a subtraction.

Progress against these targets is monitored in the London Plan Annual Monitoring Report, the latest edition of which was published in October 2019. The source for conventional and non-conventional completions is the London Development Database (LDD), a uniquely detailed database of housing developments created from data provided by London borough planning departments and checked by the GLA. The number of long-term empty homes is monitored using annual statistics reported by MHCLG, based on local authority Council Tax data. The conventional component of total housing supply is reported by the GLA to MHCLG who publish it as part of their national statistics on the ‘Net supply of housing’.

MHCLG also publish quarterly national statistics on house building. These statistics are not strictly comparable to the conventional housing supply statistics published by GLA or MHCLG themselves, as they cover only new build developments and are reported on a gross rather than net basis. They are also known to undercount even new build completions. They can however be a useful indicator of future trends in completions when these caveats are borne in mind.

Affordable homes programme monitoring

The GLA publishes quarterly affordable housing statistics on affordable homes started and completed through its affordable homes programmes, which comprise the majority of affordable housing supply in London. These statistics cover not just new build but also acquisitions of existing private sector homes for affordable housing. The dates of start and completion are those recorded for the purposes of the affordable homes programme, and may differ from the dates reported through the planning system that inform the planning statistics described above.

MHCLG publishes an annual set of national statistics on affordable housing supply that incorporate the GLA statistics, but also add any affordable homes delivered in London without GLA support.