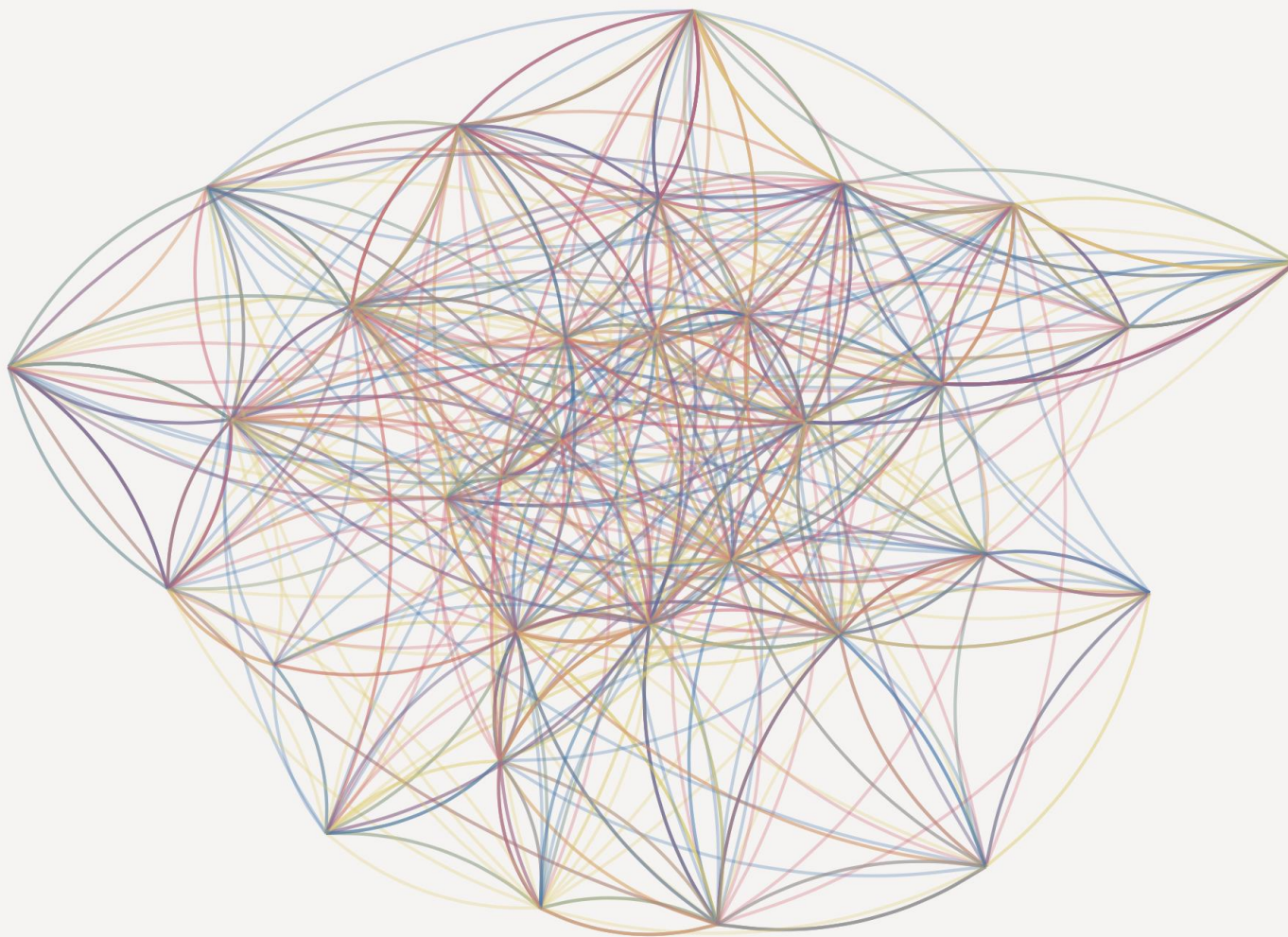


GLA Housing and Land

# Housing in London 2023

The evidence base for the London Housing Strategy



October 2023

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**Greater London Authority**  
**First edition - October 2023**

Published by the Greater London Authority  
City Hall  
Kamal Chunchie Way  
London E16 1ZE

**[www.london.gov.uk](http://www.london.gov.uk)**  
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## 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 under the following headings (click on links to go to the relevant section):

### [London Housing Strategy monitoring indicators](#)

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](#)

The report sits alongside a range of other Greater London Authority (GLA) publications that provide evidence or statistics on housing, including:

- [GLA Affordable Housing Programme statistics](#)
- [The London Plan Annual Monitoring Reports](#)
- [The State of London report](#)
- [The Survey of Londoners](#)

This report and (where available to share) the data used have been uploaded to a dedicated page on the [London Datastore](#).

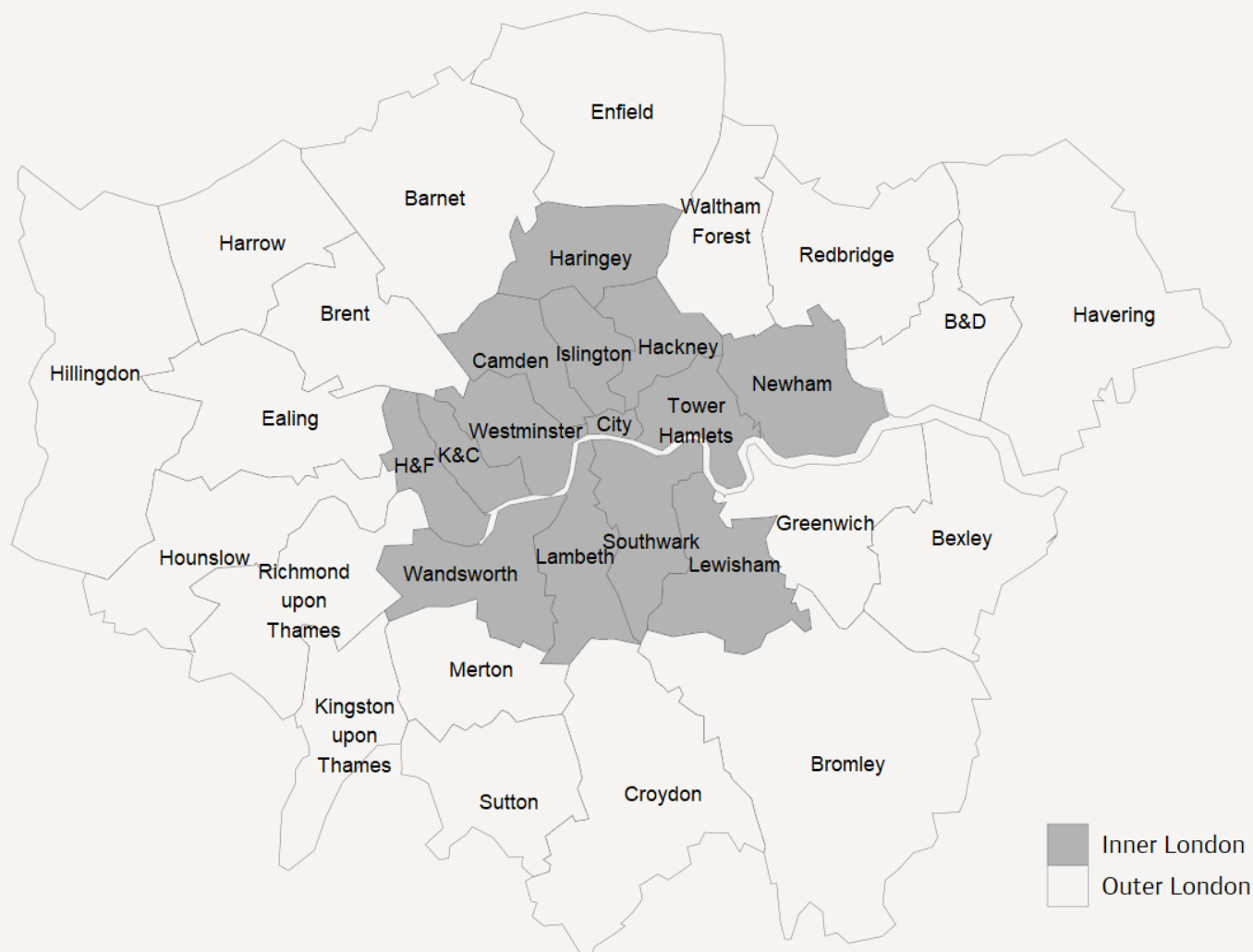
## London Housing Strategy monitoring indicators

The [London Housing Strategy: Implementation Plan \(May 2018\)](#) includes a set of headline indicators, chosen to measure the long-term impact of the London Housing Strategy and the state of the housing market in London more generally. The latest figures for each indicator are provided in this section.

- **Increasing the supply of new homes.** The latest [Annual Monitoring Report tables](#) published by the GLA state that the net supply of new homes in London according to this measure was 38,202 in 2021/22, comprised of 38,521 net conventional completions, 1,190 net non-self-contained completions and an increase of 1,509 in the number of long-term empty homes. The figure of 38,202 is an **increase** of 13.5% from 33,656 in 2020/21. The 2021 London Plan is monitored against a different measure that does not take changes in empty homes into account.
- **Increasing the stock of social housing.** This indicator is measured as the net change in the stock of low-cost rented affordable housing in London. Local authorities and housing associations owned a combined total of 793,250 low-cost rented homes in London in 2022, an **increase** of 0.3% from 790,800 in 2021 (chart 2.12).
- **Making housing more affordable.** The affordability of housing in London is measured using English Housing Survey data on housing costs as a percentage of household income. According to 2020/21 data, London households spent a median average of 24.2% of their income on housing costs, a **decrease** from 24.7% in 2019/20. Survey fieldwork for 2020/21 was severely affected by the pandemic, so the figure for that year is likely to be less reliable. Charts 3.1 and 3.2 in this report show more up-to-date figures on the proportion of Londoners who say they have struggled or expect to struggle to meet their housing costs.
- **Improving the quality of housing.** There are a number of ways to measure the quality of housing, but progress against this indicator is monitored using the percentage of homes in London at or above the Decent Homes Standard, measured using data from the English Housing Survey. 91% of homes in London met the standard in 2021, an **increase** from 85% in 2019 (chart 5.5). Again, this figure is likely to be less reliable than in previous years due to the impact of the pandemic on the fieldwork for the English Housing Survey.
- **Reducing overcrowding.** This indicator is measured using the percentage of London households that are overcrowded. The latest robust estimate comes from the 2019/20 English Housing Survey, which reported that 9.2% of households in London were overcrowded, an **increase** from 8.2% in 2018/19. The figure reported for 2020/21 in chart 4.8 is 7.8%, but this is likely to be an under-estimate as English Housing Survey estimates from during the pandemic do not take into account the significant number of people who temporarily moved in with other households during this period.

- **Improving energy efficiency of housing** is measured using the median Standard Assessment Procedure (SAP) rating of London's homes, which was estimated to be 69% in 2020, an **increase** from 67% in 2019 (chart 5.10). The same caveat about pandemic-era data from the English Housing Survey set out above applies to this figure.
- **Improving the private rented sector** is measured using the percentage of private renting households satisfied with their tenure. 50% of private renting households in London said they were satisfied with the tenure of their accommodation in 2020/21, a **decrease** from 55% in 2019/20 and 67% in 2018/19.
- **Improving conditions in the private rented sector.** This indicator is monitored by the number of Homes in Multiple Occupation (HMOs) issued with mandatory licences by London boroughs. In 2022, there were 22,014 HMOs with mandatory licences in London, an **increase** of 25% from 2021 (chart 2.14).
- **Preventing and addressing homelessness.** This indicator is measured using the number of households who were assessed, following the end of a relief duty, as owed a main duty due to being unintentionally homeless and in priority need. There were 3,170 households in this category in the first quarter of 2023, an **increase** of 29% from 2,460 in 2022 Q1 (chart 4.5).
- **Reducing homelessness** is monitored using the number of homeless households in temporary accommodation. In March 2023, there were 60,040 homeless households living in temporary accommodation arranged by London boroughs, an **increase** of 6.4% from 56,430 in March 2022 (chart 4.7).
- **Reducing rough sleeping.** 10,053 people were seen sleeping rough in London in 2022/23, an **increase** of 21% from 2021/22 (chart 4.1).

A map of Inner and Outer London boroughs, as defined by the Office for National Statistics (ONS), is provided below:



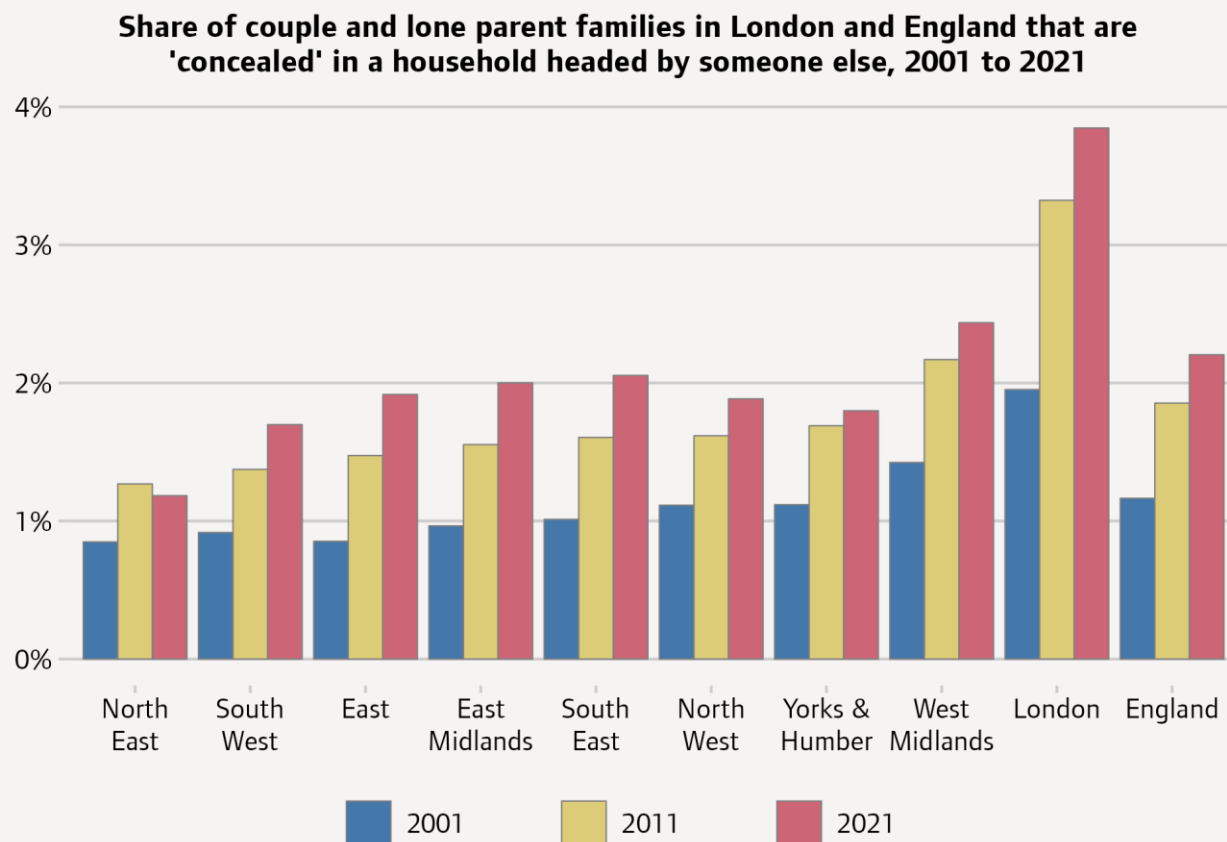
## 1. Demographic, economic and housing context

At the time of the 2021 Census there were 88,100 couple or lone parent families in London that were 'concealed' in a household headed by someone else, representing almost 4% of all families in London and up from 68,600 in 2011, indicating increasingly constrained household formation (see chart 1.1). London's population was recorded as 8.80 million in the Census, while according to more recent estimates based on administrative data it reached 8.92 million in mid-2022. Inner London boroughs recorded the fastest population growth between 2021 and 2022, after some of them lost population between the 2011 and 2021 Censuses (1.2). According to the administrative data estimates, Inner London saw faster population growth between mid-2021 and mid-2022, driven by higher levels of net inward migration (1.3).

Data on the growth of employment in London provides another indicator of change since the Census was carried out. The number of employee jobs (excluding self-employment) recorded in Inner London has grown by 11.8% since March 2021, and the number in Outer London by 9.5% (1.4).

The increased demand from population and employment growth have compounded the pressures caused by the ongoing cost of living crisis. One indicator of the resulting stresses is the growing number of housing-related issues raised by Londoners with Citizens Advice in the last year, particularly relating to homelessness and private rented homes (1.5). Another is that over the course of 2022 and 2023 a growing share of Londoners, particularly private and social tenants, have said they are 'just about managing', struggling to make ends meet, or having to go without basic needs and/or relying on debt to pay for them (1.6)

1.1 At the time of the 2021 Census there were 88,100 couple or lone parent families in London that were 'concealed' in a household headed by someone else, almost 4% of the total and up from 68,600 in 2011

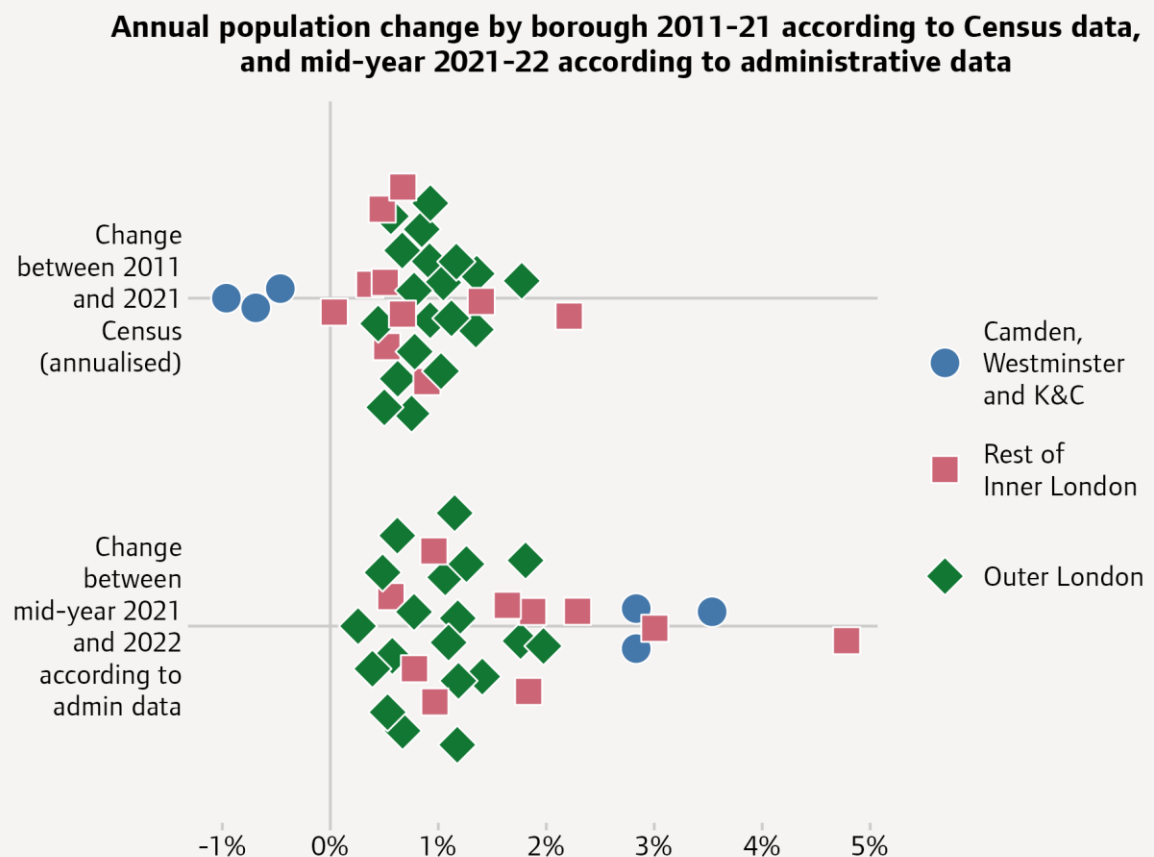


- The ONS defines a concealed family as one that does not include the Household Reference Person. In London, just under 2% of couple or lone parent families were counted as concealed in the 2001 Census, but this increased to 3.3% in 2011 and 3.8% in the 2021 Census. In total there were 88,100 concealed families in London in 2021, up from 35,400 in 2001 and 68,600 in 2011.
- The share of families who were concealed increased between 2001 and 2021 across England as a whole (from 1.2% to 2.2%) and in every region. Across England as a whole there were 353,100 concealed families in 2021, up from 161,300 in 2001 and 276,000 in 2011.
- These figures do not include people who were not considered to be in a concealed family, such as single people, or adult children living with their parents. The 2021 figures are also likely to have been affected by the pandemic and associated lockdowns at the time the Census was carried out.

ONS Census data 2001 to 2021. A concealed family is one that does not include the Household Reference Person (defined in the Appendix, but similar to the previously used concept of 'household head'). The Census definition of concealed families does not include single adults.



1.2 Inner London boroughs recorded the fastest population growth between 2021 and 2022, after some of them lost population between the 2011 and 2021 Censuses



ONS, 2011 and 2021 Census; and Admin-based population estimates: updated estimates for local authorities in England and Wales, 2021 to 2022. Chart excludes the City of London, where the population grew by 1.6% between 2011 and 2021 and then by an estimated 24.3% between 2021 and 2022.

- The results of the 2021 Census showed that London's population had reached 8.80 million, up from 8.17 million in 2011. The population grew in all but three boroughs - Camden, Westminster and Kensington & Chelsea. As the Census was taken in March 2021, it was not clear whether any of these changes reflected the short-term impacts of the pandemic or longer-term trends.
- More recently, ONS have published estimates of the population in mid-2021 and mid-2022 based on a range of administrative data. According to these figures, London's population grew from 8.79 million in mid-2021 to 8.92 million in mid-2022.
- This time, the same three boroughs that had recorded population decreases in 2011-21 showed strongly positive growth between 2021 and 2022, making up some but not all of the previous losses.
- In both periods, Tower Hamlets recorded the fastest population growth of any London borough.

1.3 According to estimates from administrative data, London’s population grew by 130,270 between mid-2021 and mid-2022, with faster growth in Inner London driven by net inward migration

**Components of 2021 to 2022 population change in Inner and Outer London according to administrative data estimates**

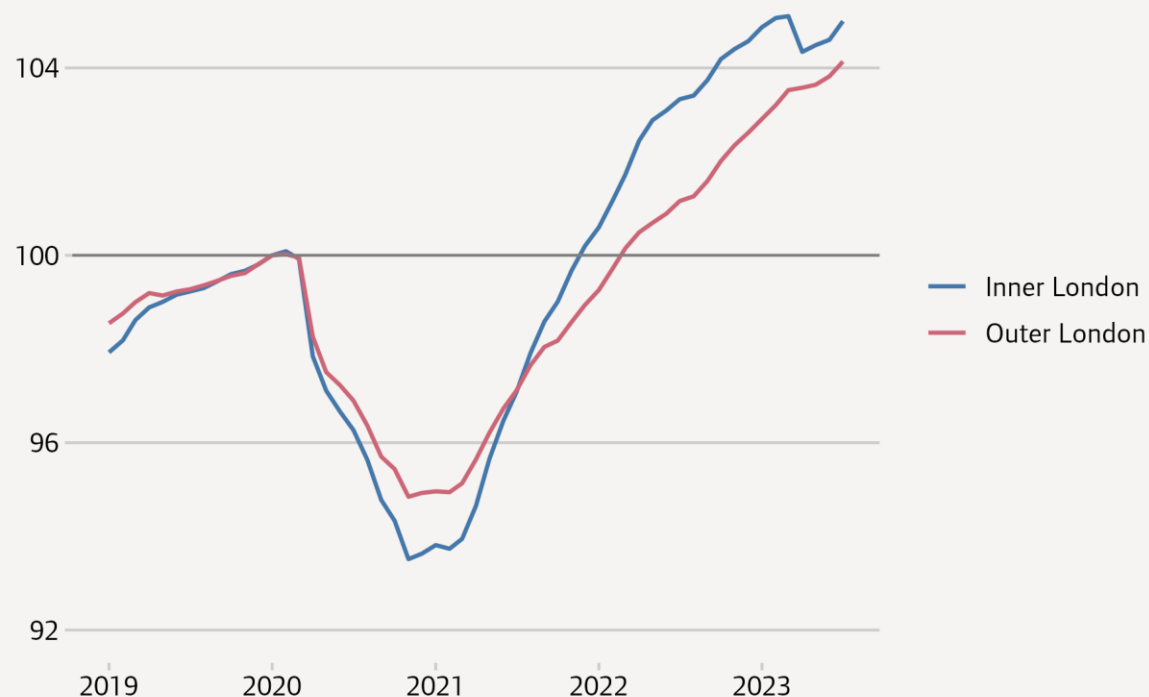


- According to ONS estimates based on administrative data, London's population grew by 130,270 between mid-2021 and mid-2022. Over the 12-month period, the number of births was 109,930, the number of deaths was 51,670 and there was a net increase of 72,000 residents from migration (combining both domestic and international migration).
- The number of births and the number of deaths were both higher in Outer London and Inner London, resulting in a net 'natural increase' of 32,340 in Outer London and 25,920 in Inner London.
- But the population increase from migration was significantly higher in Inner London at 47,450, compared to 24,550 in Outer London. In total, Inner London's population grew by 73,370 between mid-2021 and mid-2022 according to these estimates, compared to 56,890 in Outer London.

*ONS, Admin-based population estimates: updated estimates for local authorities in England and Wales, 2021 to 2022*

1.4 Since March 2021, the number of employee jobs (excluding self-employment) recorded in Inner London has grown by 11.8% and the number in Outer London by 9.5%

**Trend in employees in London (from PAYE data), January 2019 to July 2023 (January 2020 = 100)**

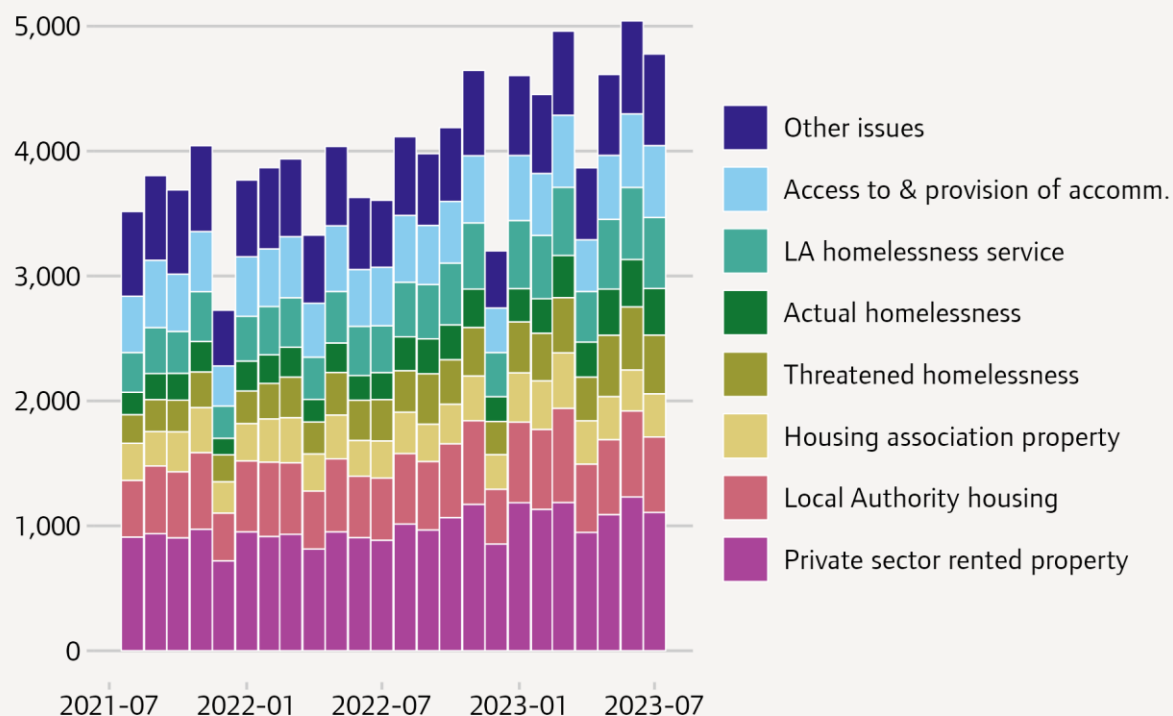


ONS, Earnings and employment from Pay As You Earn Real Time Information, UK

- According to ONS data from the PAYE system on the number of employees in work (excluding the self-employed), employment in London was growing steadily at the outset of the pandemic in March 2020.
- In the following year, there was a sharp drop in employee numbers, falling by 5.9% in Inner London and 4.9% in Outer London in the year to March 2021.
- Since early 2021 London has seen a strong recovery in employment, with the number of employees overtaking pre-pandemic levels in late 2021. The number of people employed rose by 11.8% in Inner London and by 9.5% in Outer London between March 2021 and July 2023.
- This increase in employment is likely to be linked to changes in both population patterns and in household formation, which in turn affect the housing market – for example, average rents for new tenancies have also grown strongly in London (particularly Inner London) over this period.

1.5 Citizens Advice have dealt with a growing number of housing-related issues raised by Londoners in the last year, particularly relating to homelessness and private rented homes

**Trend in number of housing-related issues dealt with by Citizens Advice in London, August 2021 to July 2023**

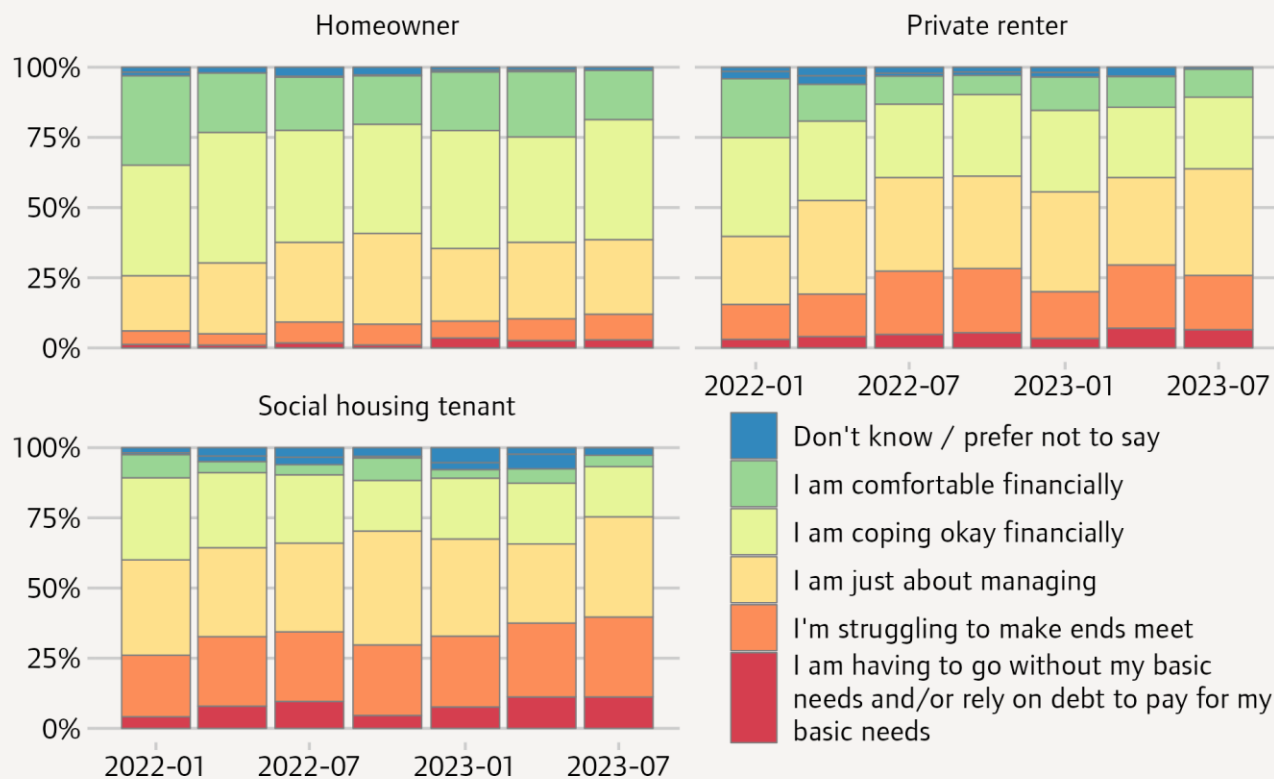


- Citizens Advice publishes monthly data on the number of issues people contact it about (whether by phone, email or web chat), broken down by broad topic and specific subjects.
- In the 12 months to July 2023, Citizens Advice dealt with 52,445 housing-related issues in London, up 19% from 43,949 in the previous 12 months. The biggest increases in percentage terms were in three subjects relating to homelessness, which all went up by more than a third.
- Private sector rented property was the subject most often raised by Londoners, and increased 20% year-on-year.
- At an even more detailed level (not shown here), the issue that grew most over the last year was disrepair relating to damp, mould or condensation.

Citizens Advice, Advice Trends.

1.6 Over the course of 2022 and 2023 a growing share of Londoners, particularly private and social tenants, have said they are ‘just about managing’, struggling to make ends meet, or having to go without basic needs and/or relying on debt to pay for them

**Self-reported financial situation of Londoners by housing tenure, January 2022 to July 2023**



- YouGov has been regularly surveying Londoners on the cost of living crisis on behalf of the GLA since January 2022.
- In January 2023, 10% of homeowners, 20% of private renters and 33% of social housing tenants said they were struggling to make ends meet, going without their basic needs and/or relying on debt to pay for them. Nearly half of Londoners said they were either coping okay financially (33%) or comfortable (15%), but among social housing tenants only 22% said they were coping okay financially and 3% said they were comfortable.
- The financial situations of Londoners worsened over the following six months. By July 2023, 12% of homeowners, 26% of private renters and 40% of social housing tenants said they were struggling to make ends meet, going without basic needs and/or relying on debt to pay for them.

All figures, unless otherwise stated, are from YouGov Plc. See Appendix for details of methods, sample sizes and fieldwork dates. The homeowner category includes mortgaged owners, outright owners and shared owners. The question asked was “Thinking about your current financial situation, which of these statements best applies to you?”

## 2. Housing stock and new supply

According to government statistics that have been adjusted in light of the 2021 Census, recent new housing supply in London peaked at 45,676 net additional dwellings in 2019/20 and fell to 37,204 in 2021/22 (chart 2.1). More recent data from Energy Performance Certificates shows that the number of new homes completed in London so far in 2023 is trending significantly lower than the number that had been built by this point in the previous three years (2.2).

A net 24,360 new homes were built on small developments (those of less than 10 homes) in London between 2012/13 and 2021/22, with Croydon building far more than any other London borough (2.3). In the year to June 2023, planning permission was granted for an estimated 58,300 new homes in London. The number of separate projects approved has been falling for several years, indicating that a higher proportion of newly approved homes are on large schemes (2.4). 38% of homes recommended for approval by the Mayor in 2022 were affordable homes, a slight increase on the previous few years and the highest level recorded so far (2.5).

Sales of new market homes on large developments in London have fallen considerably since the recent peak in early 2022, partly due to the ending of the Help to Buy scheme (2.6). The Build to Rent (BTR) sector is continuing to grow, with a total of 54,723 homes started in London between 2009 and 2022, and 73% of them already completed (2.7).

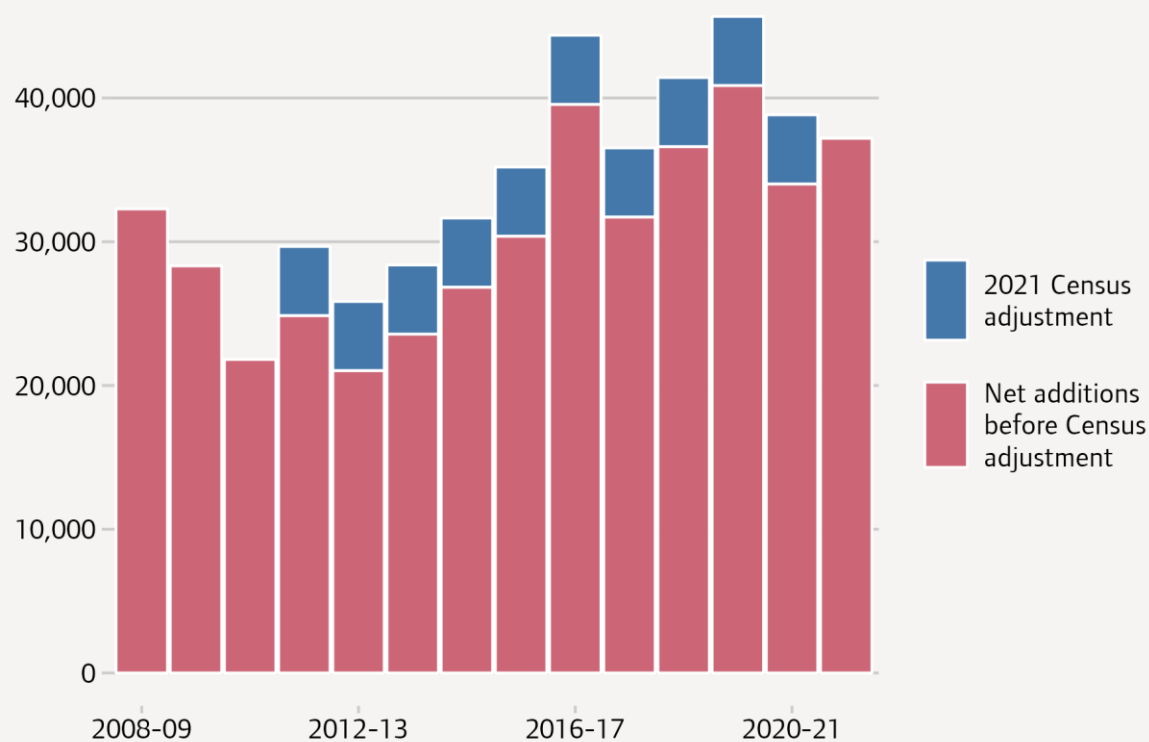
GLA-funded affordable housing starts in 2022/23 rose by 60% from the year before, with 25,700 homes started across all types of affordable housing (2.8). 10,270 new council homes were started by London boroughs in 2022/23 with GLA support, up 106% from 2021/22 and the highest number of council housing starts in London since the 1970s (2.9). 12,071 affordable homes were completed in London in 2021/22, 11% more than in 2020/21 and 109% higher than the recent low in 2015/16 (2.10).

1,850 council homes in London were sold through the Right to Buy scheme in 2022/23, well below the peaks seen in the 1980s, early 2000s and mid-2010s (2.11). Social housing landlords in London owned 793,250 affordable homes for rent in 2022, the highest total since 2002 (2.12).

An estimated 2.4% of homes in London were officially recorded as empty for Council Tax purposes in 2022, following an increase in recent years (2.13). In 2022, there were 22,000 Homes in Multiple Occupation (HMOs) with mandatory licences issued by London boroughs, up from 6,000 in 2015 and the highest of any region (2.14).

2.1 According to government statistics that have been adjusted in light of the 2021 Census, recent new housing supply in London peaked at 45,676 net additional dwellings in 2019-20 and fell to 37,204 in 2021/22

**Net additional dwellings in London before and after adjustment for 2021 Census, 2008-09 to 2021-22**

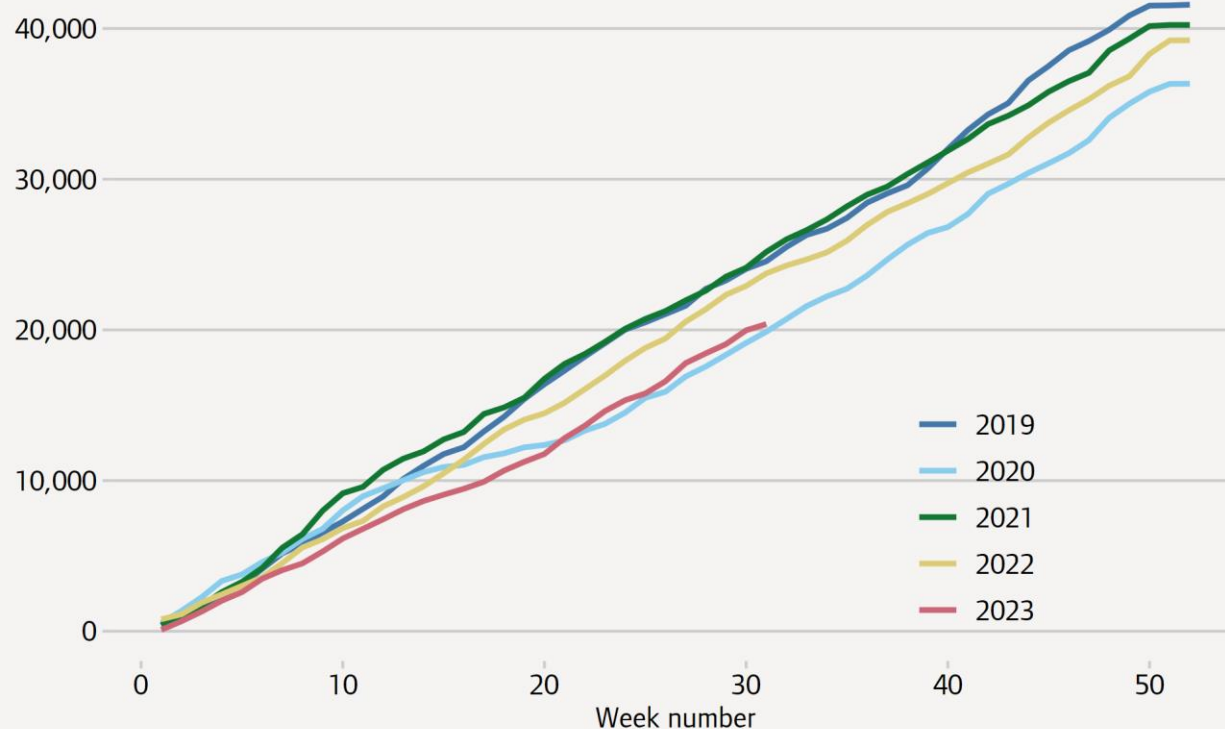


- According to DLUHC's main measure of new housing supply, 37,200 net additional homes were completed in London in 2021/22, down slightly from the year before.
- DLUHC have recently adjusted their dwelling stock statistics to account for the 2021 Census identifying a greater number of dwellings in London (and in some other areas) than anticipated. This adjustment results in an increase of 4,806 in each of the ten years from 2011/12 to 2020/21, or an additional 48,060 across the decade as a whole.
- Following this adjustment, the peak number of net additional dwellings in 2019-20 increases to 45,676. Net additions fell in the following two years, probably affected by the pandemic, the associated increase in construction material costs and the recent energy price crunch.

DLUHC, Housing Live Table 109 (pre- and post-Census adjustment).

2.2 More recent data from Energy Performance Certificates (EPCs) shows that the number of new homes completed in London so far in 2023 is trending significantly lower than the number that had been built by this point in the previous three years

**Cumulative weekly Energy Performance Certificates for new dwellings in London, 2019 to 2023**



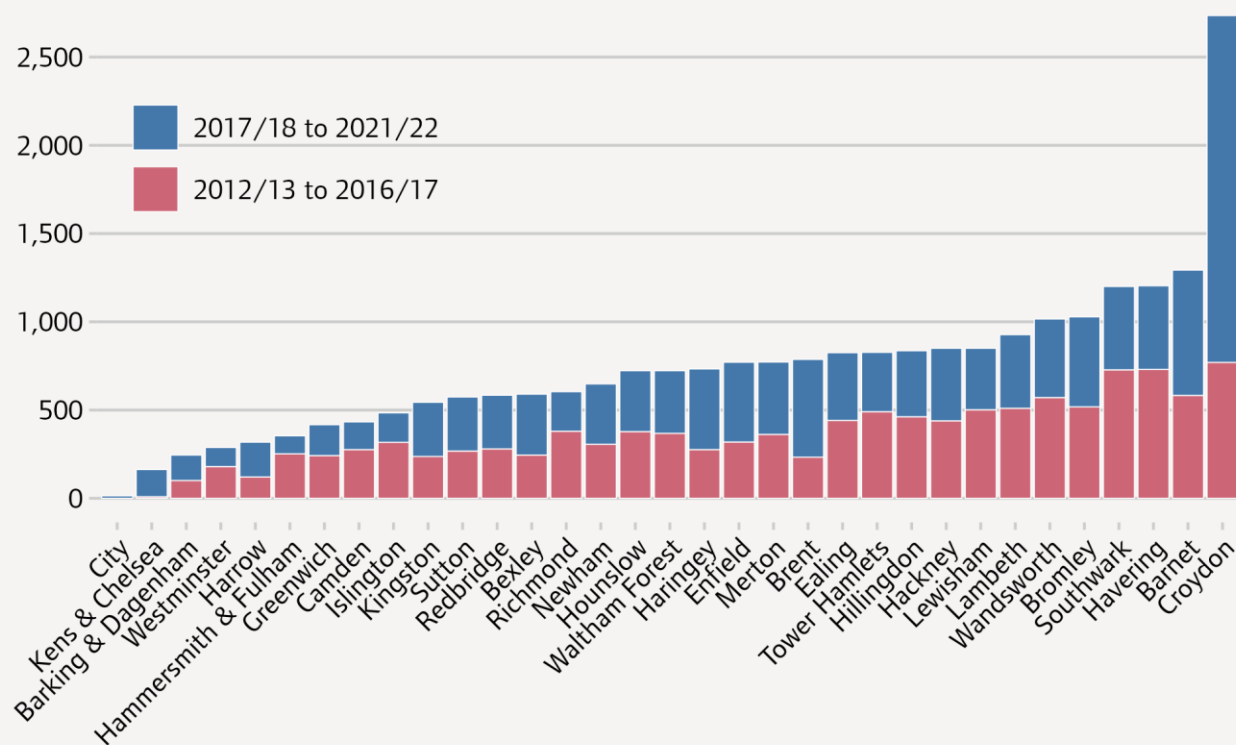
- Analysts increasingly use data on the number of EPCs registered for new dwellings to monitor new housing supply. DLUHC now publishes weekly data on the number of EPCs for new dwellings registered in each region, allowing for comparison of within-year trends.
- EPCs for 41,580 new homes were registered in London in 2019, but this figure fell to 36,340 in 2020 due to the onset of the pandemic and the associated lockdowns. The number of new homes completed then recovered to 40,240 in 2021 and 39,220 in 2022.
- Housebuilding in 2023 was the lowest of the last five years until mid-May, and has since followed the trend of 2020. As of early August, EPCs for 20,385 new dwellings had been registered in London in 2023.

*DLUHC Energy Performance Certificates data.*



2.3 A net 24,360 new homes were built on small developments (those of less than 10 homes) in London between 2012/13 and 2021/22, with Croydon building far more than any other London borough

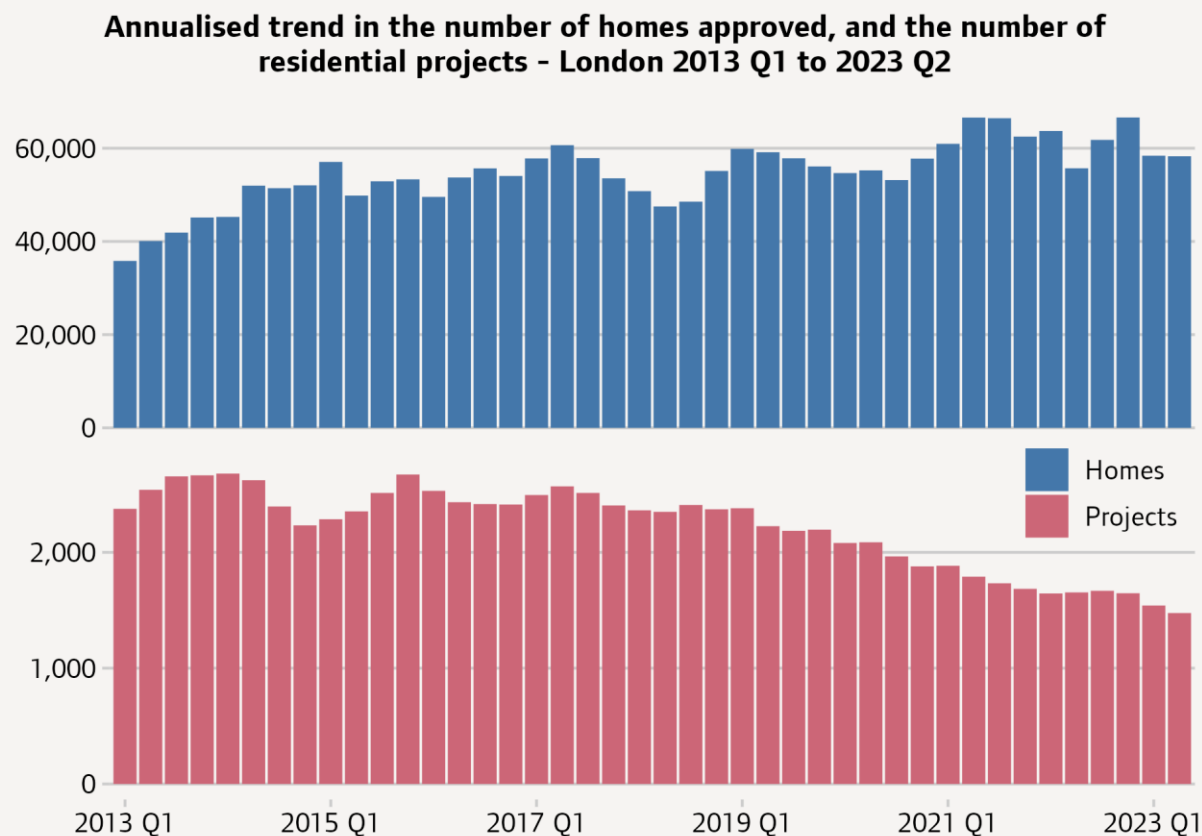
**Net number of new build homes completed on small developments (less than 10 homes) in London by borough, 2012/13 to 2021/22**



- Small developments (those comprising less than 10 new homes each) are a potentially significant source of new housing supply in London. Between 2012/13 and 2021/22 there were 24,360 new homes built in small developments across London, after netting off any existing homes replaced or demolished.
- The number of new homes built during this period on small developments varied greatly across boroughs, from 14 in the City of London and 163 in Kensington & Chelsea to 2,735 in Croydon.
- There was a particularly large increase in building on small developments in Croydon after it introduced supportive planning guidance, with net completions rising from 770 in 2012/13 to 2021/22 – almost three times as much as the next placed borough (Barnet, with 710 net completions).

GLA, Planning London Datahub. Data is provisional and subject to change as the Datahub is updated.

2.4 In the year to June 2023, planning permission was granted for an estimated 58,300 new homes in London. The number of separate projects approved has been falling for several years, indicating that a higher proportion of newly approved homes are on large schemes

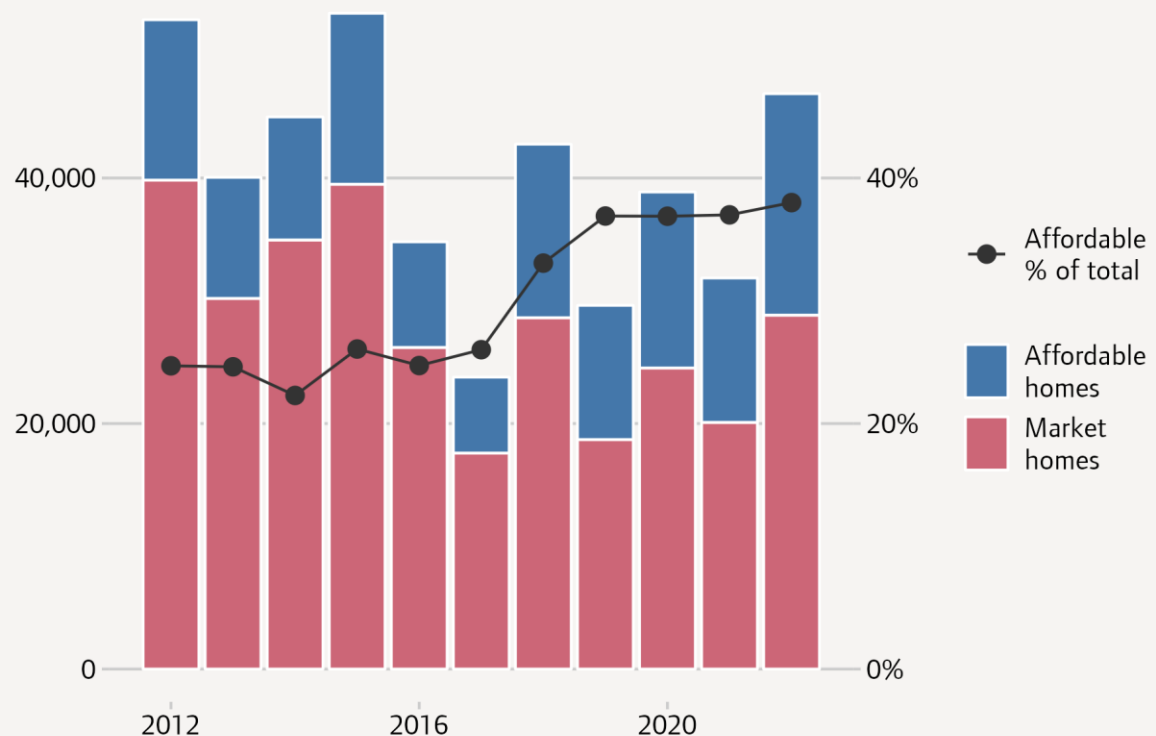


- According to Glenigan data on planning permissions published by the Home Builders Federation (HBF), planning permission was granted for 58,300 new homes in London in the year to Q2 2023, an increase of 5% from the year before. Across England as a whole, 265,200 new homes were approved in the year to Q2 2023, down 8% from the year before.
- Glenigan and the HBF also report the number of individual housing projects given planning permission in a given quarter. The annualised number of projects approved in London has fallen steadily in recent years, from 2,670 in 2015 to 1,480 in the year to June 2023.
- The average project size has more than doubled from 17 homes per project in 2013 to 39 in the most recent 12 months. Evidence suggests that when proposed new homes are concentrated in a smaller number of larger projects the rate at which they are built is likely to fall.

HBF, New Housing Pipeline (using data from Glenigan).

2.5 38% of homes recommended for approval by the Mayor in 2022 were affordable homes, a slight increase on the previous few years and the highest level recorded so far

**Affordable and market homes on referable planning applications recommended for approval by the Mayor, 2012 to 2022**

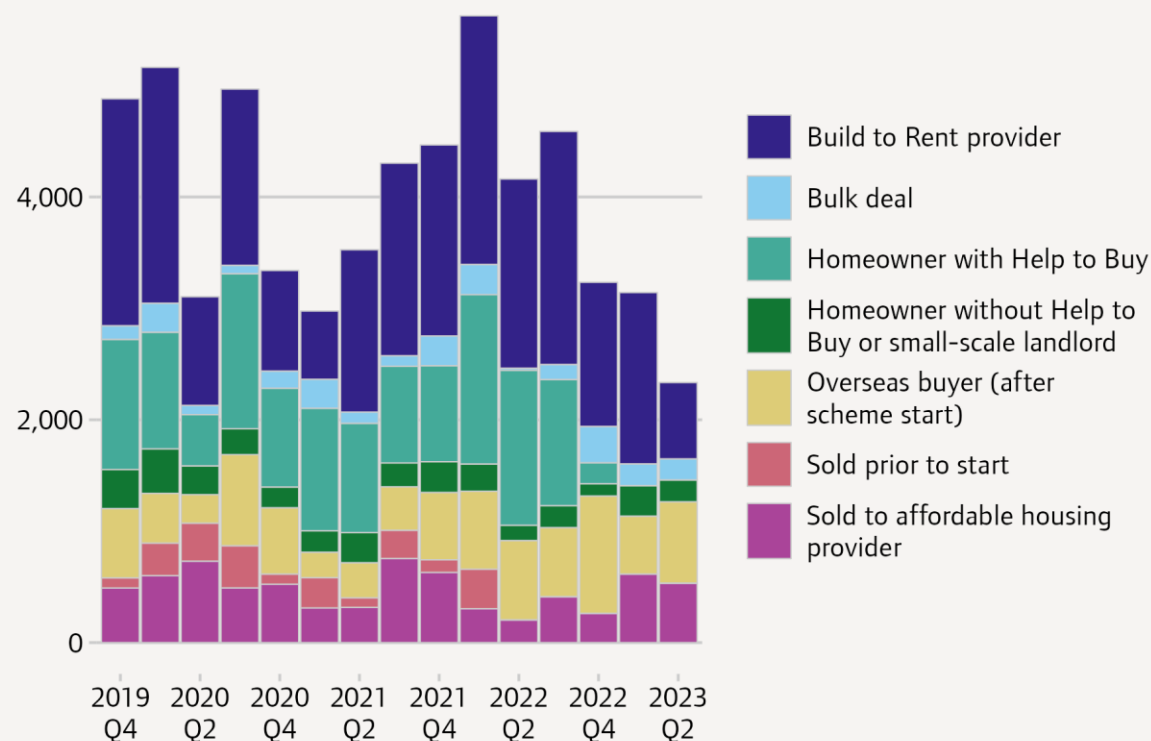


- 46,844 homes were recommended for approval at Stage Two and Three by the Mayor in 2022, an increase of 47% from 2021 but still below the peak of 53,400 in 2015.
- Of the homes recommended for approval by the Mayor in 2022, 18,043 were affordable homes, up 53% from 2021. The number of market homes in schemes recommended for approval by the Mayor in 2022 was 28,832, up 43% from 2021.
- The share of homes recommended for approval that were affordable rose slightly to 38%, the highest level recorded so far. When measured in terms of the average percentage of affordable housing per scheme, the figure of 41% recorded in 2022 was a slight fall from the peak of 43% in 2021.
- Across all schemes recommended for approval by the Mayor in 2022, affordable housing comprised an average of 43% of habitable rooms, up from 39% in 2021.

*GLA (2023) Affordable Housing Planning Analysis: Referable Applications. Referable applications are those of potential strategic importance (according to criteria in the 2008 Mayor of London Order), which local planning authorities are required to refer to the Mayor. The Mayor makes his final decisions on these applications in what are known as Stage Two and Stage Three decisions.*

2.6 Sales of new market homes on large developments in London have fallen considerably since the recent peak in early 2022, partly due to the ending of the Help to Buy scheme

**Method of sale for new market homes on large developments in London, 2019 Q4 to 2023 Q2**

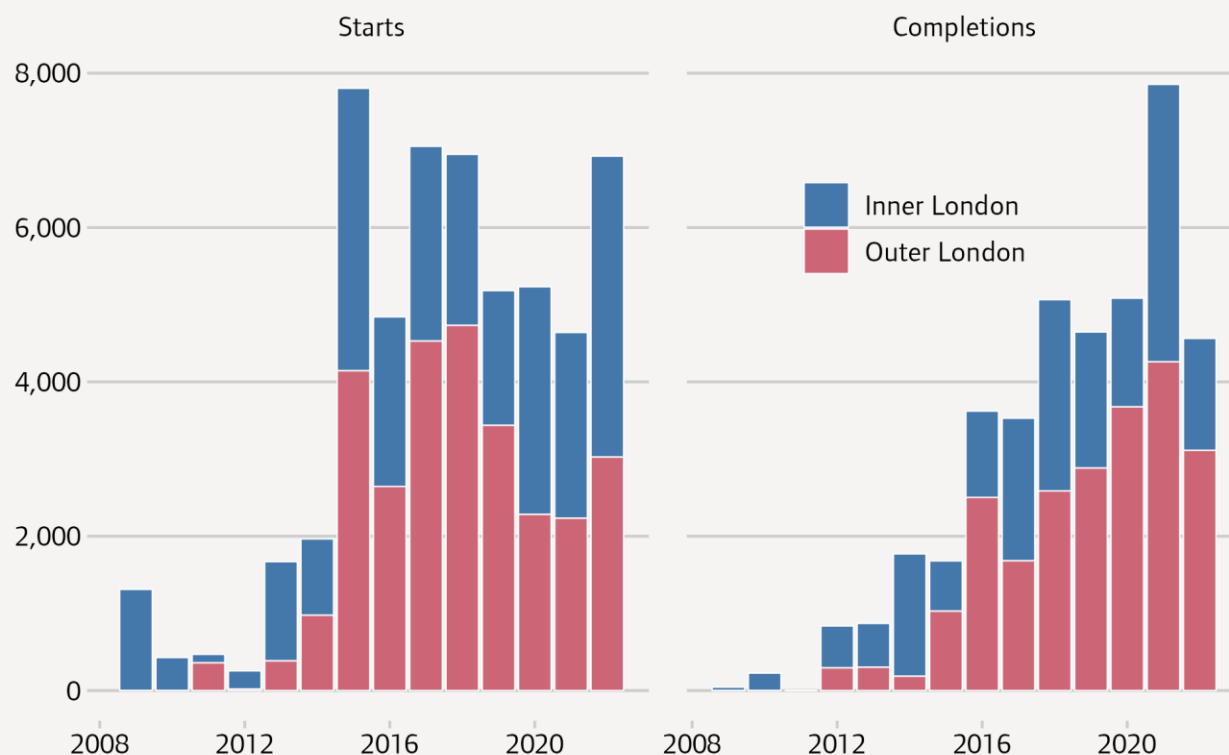


- The research consultancy Molior has analysed the sales method for new market homes on developments selling 12 or more homes per quarter in London since late 2019.
- Build to Rent (BTR) homes were the largest category across the period, with significant increases throughout 2021, before dipping during late-2022 and into 2023, when they accounted for 29% of the total.
- The number of sales per quarter to overseas buyers (excluding any sales prior to construction starting) has been volatile, rising considerably in the last year when they accounted for 22% of the total in the last year.
- Sales to individual home buyers without the aid of Help to Buy dropped by 35% during the first lockdown but have now recovered to pre-pandemic levels. Help to Buy sales contributed to a large proportion of sales up until the end of the scheme in early 2023, and total sales have fallen significantly since then.

Molior London research. ‘Large developments’ are defined here as schemes with 12 or more units. The Build to Rent category refers to new homes being built specifically to be rented rather than sold, or homes that were built for sale but sold to large-scale landlords. Bulk deals are when an investor or other buyer purchases at least two homes in a scheme but not an entire block.

2.7 The Build to Rent (BTR) sector is continuing to grow, with a total of 54,723 homes started in London between 2009 and 2022, and 73% of them already completed

**Number of Build to Rent homes started and completed in London by area, 2009 to 2022**

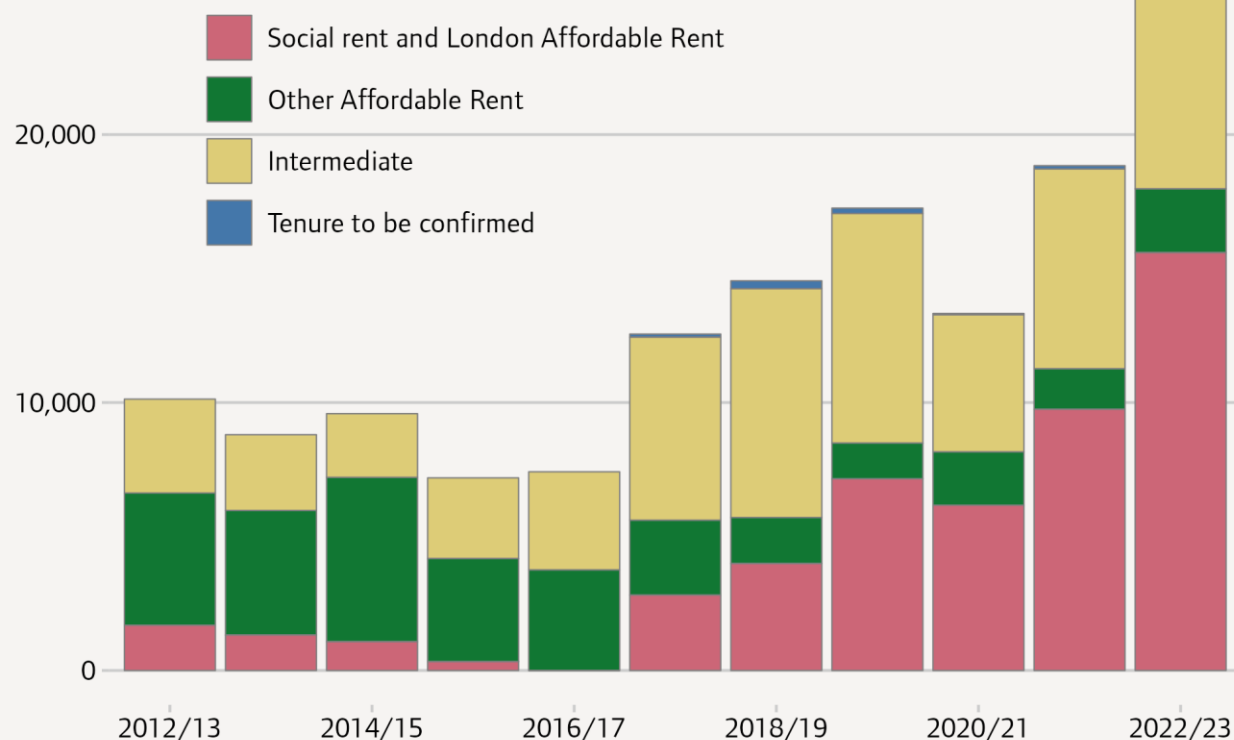


- BTR schemes are purpose-built for market rent. There are a range of organisations active in London’s BTR market including institutional investors, private developers, local authorities, and housing associations.
- Between January 2009 and December 2022, 54,723 BTR homes were started and 39,791 were completed, with supply increasingly focused on Outer London (generally in or near town centres).
- There were 6,925 new BTR homes started in London in 2022, 50% more than were started in 2021. On the other hand, completions fell between 2021 and 2022 by 42%, driven by a 60% reduction in homes completed in Inner London.

*Molior, quarterly BTR starts and completions.*

2.8 GLA-funded affordable housing starts in 2022/23 rose by 60% from the year before, with 25,700 homes started across all types of affordable housing

**Affordable housing starts in London funded by the GLA, 2012/13 to 2022/23**

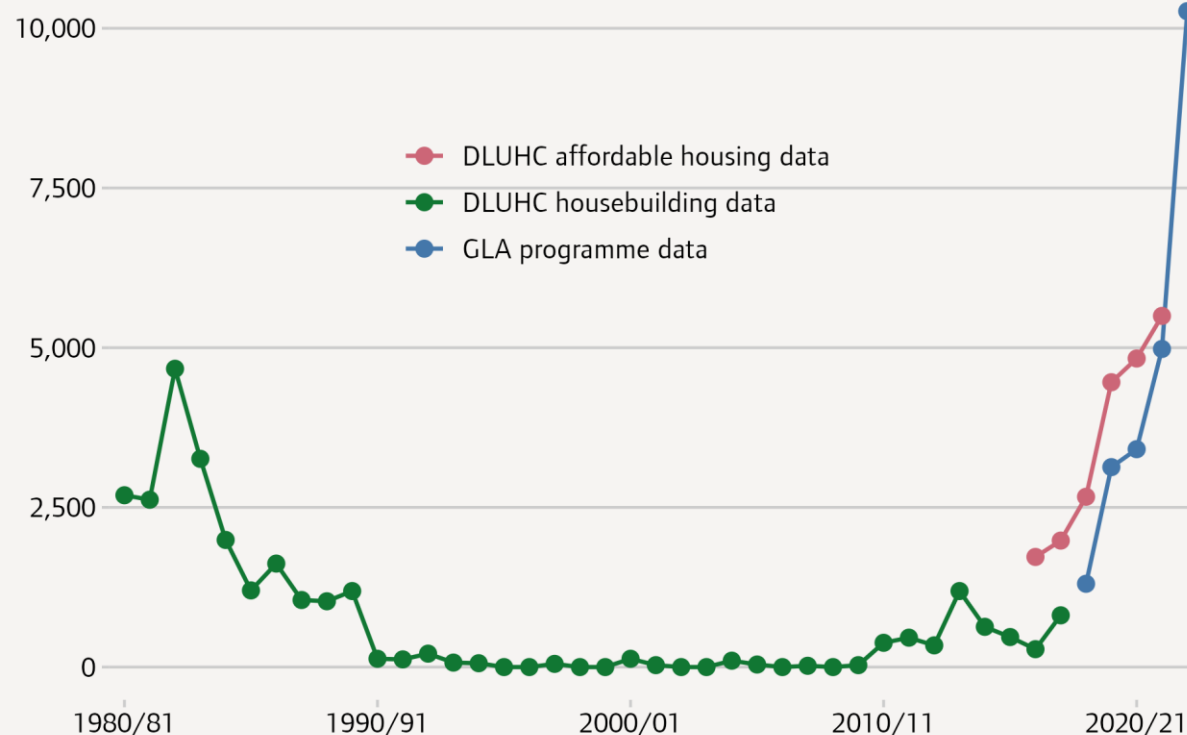


- 25,658 GLA-funded affordable homes were started in 2022/23, by some distance the highest number of starts since GLA records began in 2012. This figure represents a 36% increase on 2021/2022 and a 93% increase in affordable starts since the pandemic-related dip in 2020/21.
- In 2022/23, social rent and London Affordable Rent (LAR) homes continued to make up the majority of GLA-funded affordable housing starts, with a 60% increase from last year. The 15,995 social rent and LAR homes started in 2022/23 is the highest number on record. The number of intermediate homes started rose by 3% from 2021/22 and remains lower than the number started in years preceding the pandemic.
- 60% of the GLA-funded affordable housing starts in 2022/23 were in Outer London, and the borough with the most starts was Greenwich with 2,426. The City of London had the lowest number with one GLA-funded affordable home started, followed by Havering with 79 starts.

GLA Affordable Housing statistics.

2.9 10,270 new council homes were started by London boroughs in 2022/23 with GLA support, up 106% from 2021/22 and the highest number of council housing starts in London since the 1970s

**Number of council homes started by London boroughs, 1980/81 to 2022/23**

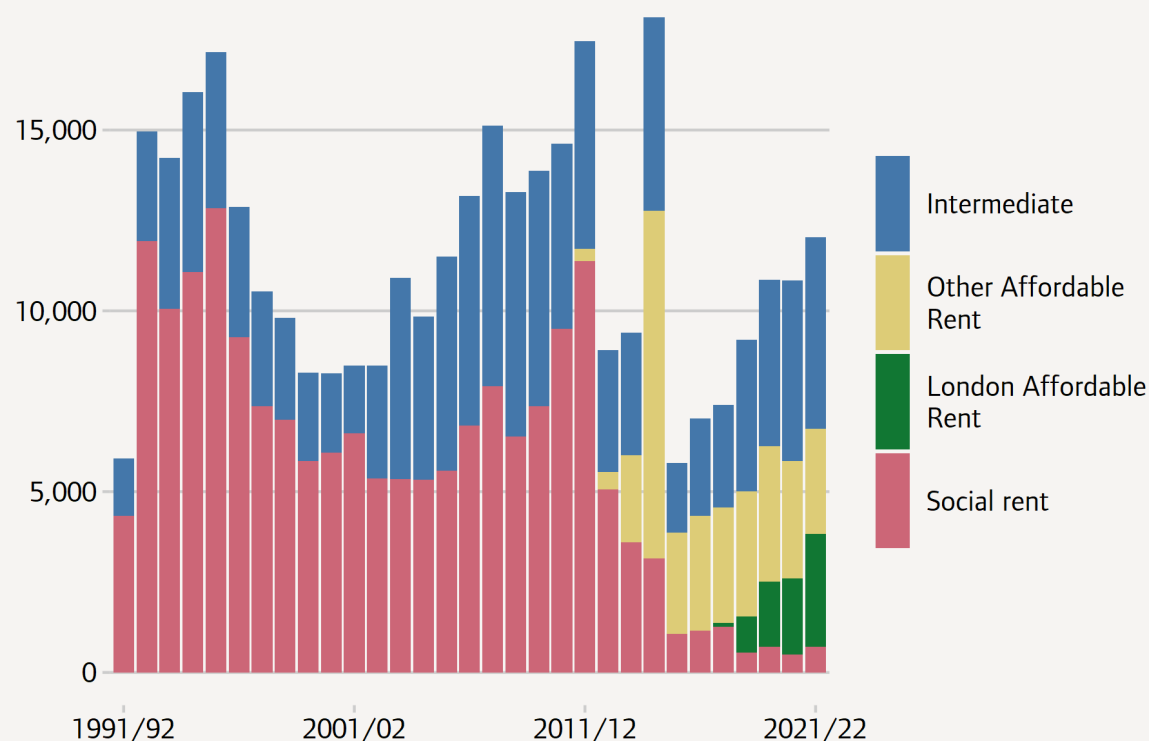


- Council housebuilding in London peaked in the 1970s, and in the early 1980s London councils were still starting substantial numbers of new homes, with 4,670 homes started by councils at the last peak in 1982/83.
- By the end of the decade, the combined effect of government-imposed borrowing restrictions and an absence of grant funding meant that very few council homes were being started. This situation 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 2022/23, 10,267 new council home starts were recorded by the GLA, an increase of 106% since 2021/22 according to GLA programme data. DLUHC's affordable housing data is not yet available for 2022/23 but shows that more council homes were started in 2021/22 than in any other year since the 1970s.

Figures for 1980/81 to 2017/18 are from DLUHC housebuilding data from live table 253. Affordable housing data for 2016/17 to 2021/22 are from live table 1011. Figures for 2018/19 to 2022/23 are from GLA affordable housing statistics.

2.10 12,071 affordable homes were completed in London in 2021/22, 11% more than in 2020/21 and 109% higher than the recent low in 2015/16

**Affordable housing completions in London (from all funding sources), 1991/92 to 2021/22**



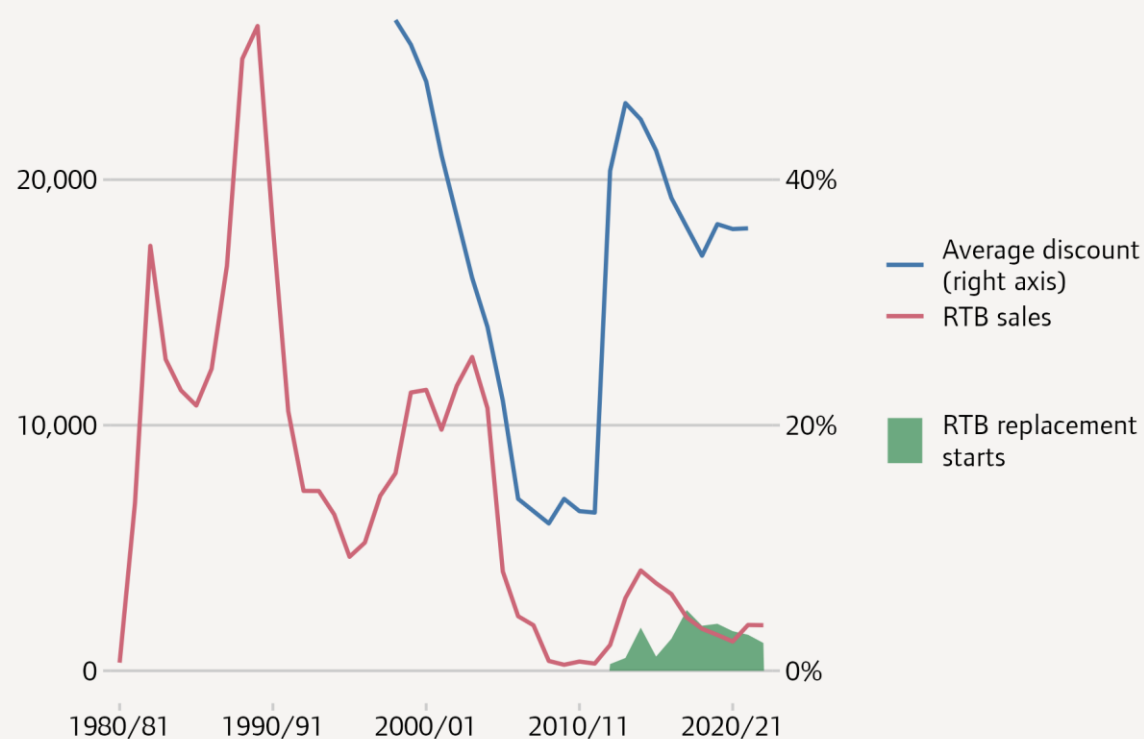
- Counting homes funded from all sources, a total of 12,071 affordable homes were completed in London in 2021/22, an 11% increase from 2020/21 and a 109% increase on the 28-year low recorded in 2015/16.
- The mix of new affordable homes completed has changed significantly since the beginning of the 2010s, with the introduction of Affordable Rent in 2010 and London Affordable Rent in 2016.
- In 2021/22, 3,840 social rent and London Affordable Rent homes were completed, 32% of the total and nearly a 50% increase from 2,600 in 2020/21. There were 2,900 completions of other Affordable Rent homes (24% of the total) and 4,970 completions of intermediate homes (44% of the total).

*DLUHC affordable housing supply live table 1011. The method for collecting these statistics is different from the net conventional completions measure used earlier. The figures include acquisitions and do not net off losses to the stock and therefore represent gross completions. Figures for 2022/23 are not yet available.*



2.11 1,850 council homes in London were sold through the Right to Buy (RTB) scheme in 2022/23, well below the peaks seen in the 1980s, early 2000s and mid-2010s

**Annual Right to Buy council housing sales, average discount and replacements in London, 1980/81 to 2022/23**

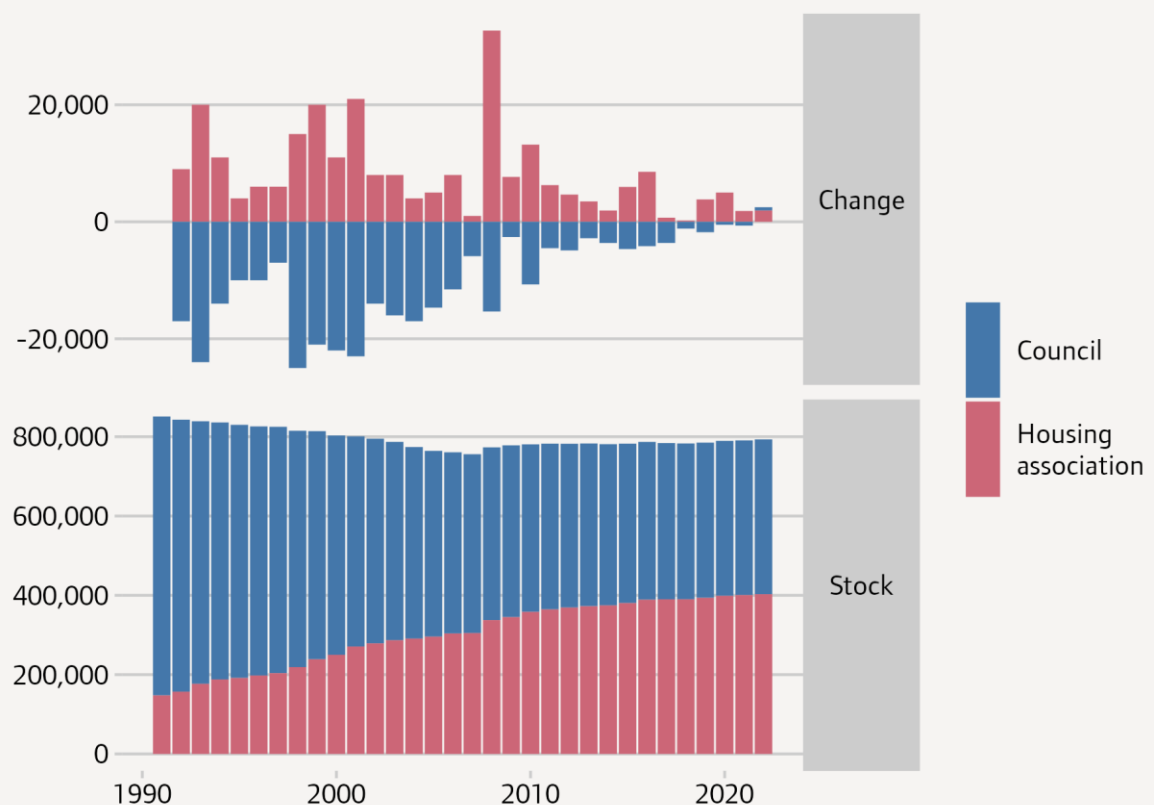


- 1,850 council homes in London were sold through the RTB in 2022/23. This figure is very slightly below that of the year before, but it does not include some categories of sales so the final figure for 2022/23 is likely to show an increase. Sales volumes over the last decade have been far below the most recent peak of 12,780 sales in 2003/04, and the record annual figure of 26,260 in 1990.
- The mean average price of a home sold under the RTB scheme in London in 2021/22 was £297,000, and the average discount was £107,000 or 36%.
- In London in 2022/23, there were 1,130 homes started or acquired by local authorities using RTB receipts as a funding source, in effect replacing lost council rented homes. Since 2012/13, a total of 14,850 homes have been started/acquired with RTB receipts, equivalent to 59% of the number of RTB sales over the same period (25,040).

*DLUHC, live table 691b (to 2021/22) and 691a.1 (for 2022/23) for sales; live table 693c for RTB replacements; live table 643 (to 2010/11) and Local Authority Housing Statistics (Section B) for average discount. Sales in 2022/23 are 'eligible sales' only and exclude any sales outside a Housing Revenue Account and any sales of properties built after 2008. RTB replacements include new build and acquisitions.*

2.12 Social housing landlords in London owned 793,250 affordable homes for rent in 2022, the highest total since 2002

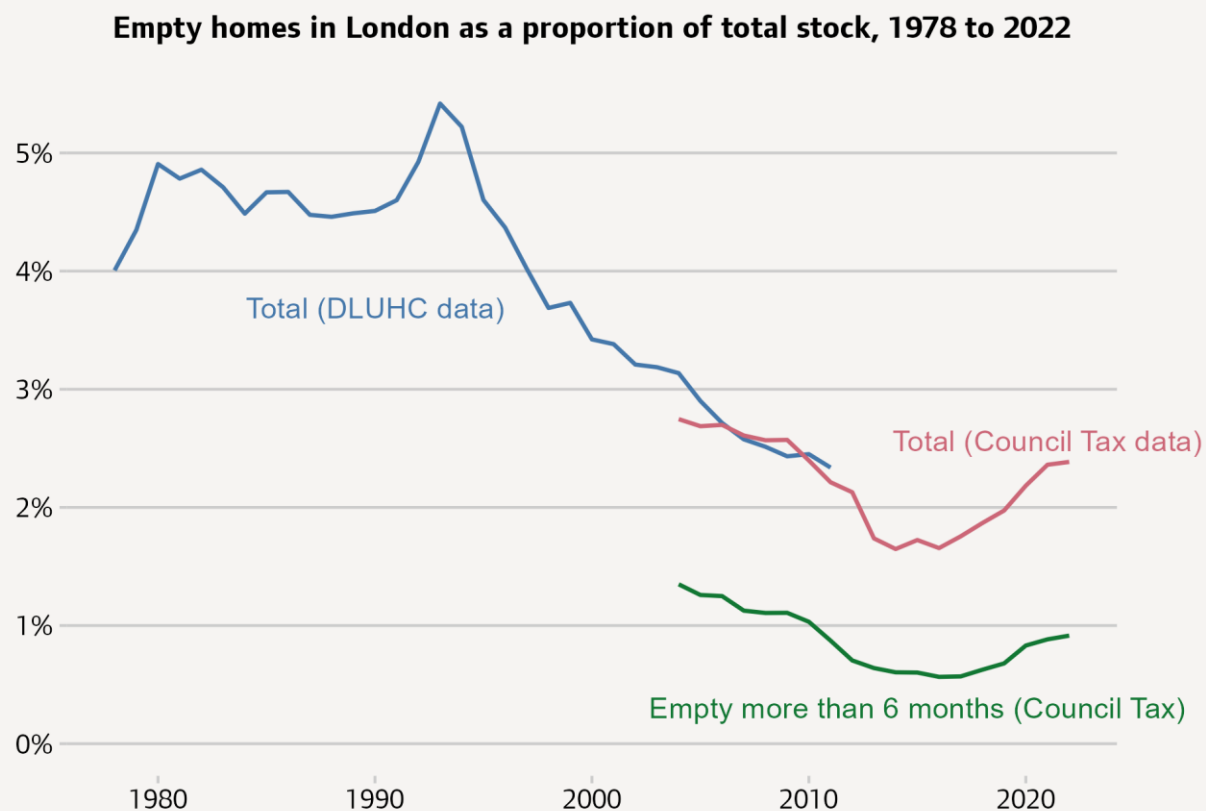
**Affordable housing in London (excluding shared ownership) by type of landlord**



- Local authorities in London owned 390,360 affordable homes (including social rent and Affordable Rent but excluding shared ownership) in 2022, up slightly from 389,820 in 2021. This is the first increase in the stock of council housing in London since the early 1990s when this data source began.
- Housing associations owned another 402,890 homes in 2022, up from 400,940 in 2021.
- The combined total of 793,250 is an increase of 2,490 from 2021 and the highest total since 2002.
- Over this period the share of affordable homes in London owned by housing associations has grown from 17% in 1991 to 51% in 2022, driven by a combination of new supply, the Right to Buy and stock transfers from council ownership.

DLUHC live table 109.

2.13 An estimated 2.4% of homes in London were officially recorded as empty for Council Tax purposes in 2022, following an increase in recent years

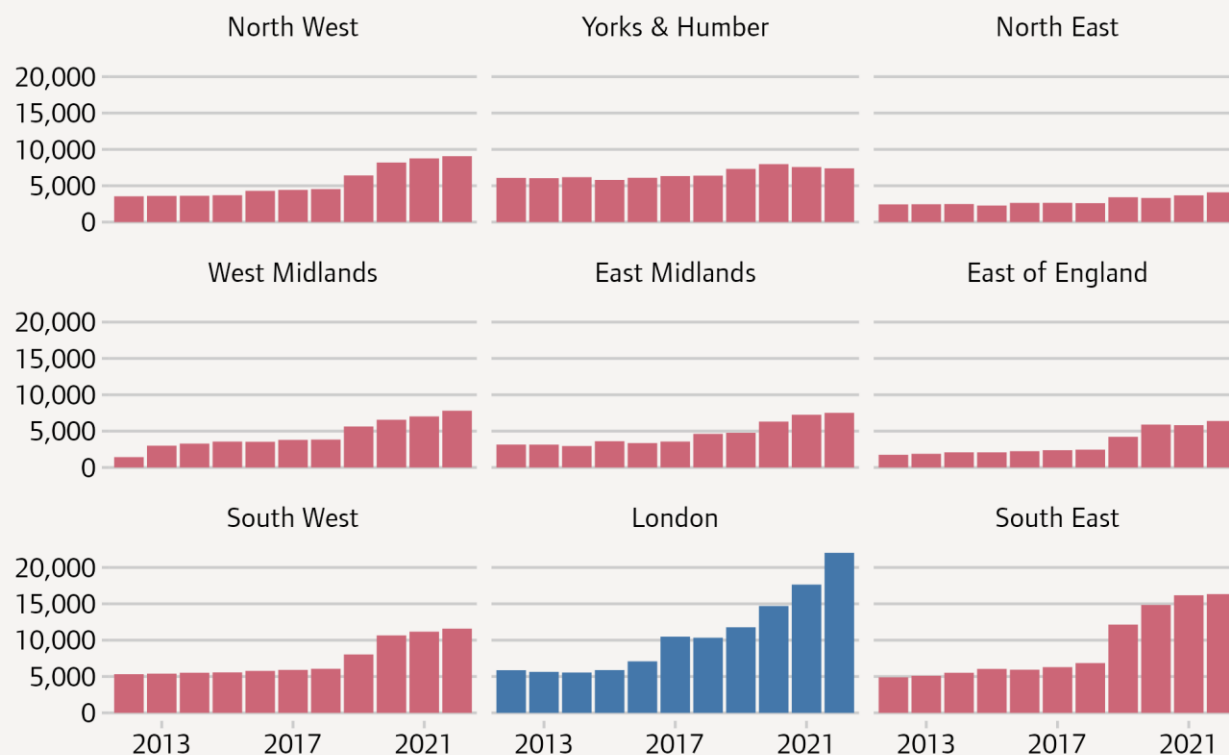


Compiled by GLA from: 1978 to 2011 from historical data provided to GLA by DLUHC and figures reported by local authorities to DLUHC: 2004 on from Council Tax statistics published by DLUHC in live table 615.

- According to Council Tax data there were 89,508 empty homes in London in 2022, equivalent to 2.4% of the total dwelling stock, up from a low of 1.7% in 2014. Across England as a whole 2.7% of dwellings were empty in 2022.
- Long-term data indicates that both the number of recorded empty homes in London and their share of the total housing stock are still at relatively low levels, having fallen steadily from a figure of 160,500 empty homes in 1993 (5.4% of the stock at the time).
- In 2022, there were 34,330 homes in London that had been recorded as empty for more than six months, equal to 0.9% of the total dwelling stock (and up from a low of 0.6% in 2018).
- A number of factors appear to be contributing to the growing number of empty homes in recent years, including an increase in the number of homes left empty after the death of their occupant due to delays in probate, and an increase in the number of empty social housing properties.

2.14 In 2022, there were 22,000 Homes in Multiple Occupation (HMOs) with mandatory licences issued by London boroughs, up from 6,000 in 2015 and the highest of any region

**Number of mandatory licensed Homes in Multiple Occupation by region, 2012 to 2022**



- A HMO is a property rented out by at least three people who are not from the same household but who share toilet, bathroom or kitchen facilities. HMOs must be licensed where the property is rented to five or more people who share facilities.
- The number of HMOs that have been issued with mandatory licences in London increased by 25% from 17,645 in 2021 to a new high of 22,014 in 2022, nearly four times higher than the 5,885 HMOs with mandatory licences in 2015.
- After London, the region with the most mandatory licensed HMOs was the South East with 16,334, followed by the South West with 11,585. The figures were considerably lower across the Midlands and Northern regions.
- In 2022, local authorities estimated there were a total of 147,600 HMOs in London, of which 31,300 were mandatory licensable.

*DLUHC, Local authority housing statistics open data. Local authorities can also apply to the government for approval to introduce additional licensing of HMOs in designated areas, where they can demonstrate a need to licence HMOs not subject to mandatory licensing.*

### 3. Housing costs and affordability

London's high housing costs are exacerbating the impact of the ongoing cost of living crisis. Polling shows that 51% of social housing tenants and 40% of private tenants in London said in July 2023 that they definitely or probably will struggle to meet their housing payments in the next six months, while the proportion of home owners who expected to struggle has increased since last year (chart 3.1). Londoners from a Black or other minority ethnicity background were both more likely to have struggled to meet housing payments in the last six months and to feel less confident about meeting them without a struggle in the next six months (3.2).

High rates of inflation mean that after adjusting for changes in the purchasing power of the pound, the average London house price in June 2023 was 10.2% lower than its level in June 2022 (but still 8% higher than ten years ago) (3.3). The increasing pressures on homeowners are instead driven by the recent increase in interest rates: at the end of 2022 there were around 762,000 outstanding fixed-rate mortgages in London that were due to come to the end of their fixed-rate period by the end of 2027, with many households likely to pay significantly more in interest as a result (3.4).

The recent increase in mortgage lending to first-time buyers in London has been concentrated among mortgages with low loan-to-value ratios (3.5). Those who buy a first home in London are now putting down an average deposit of around £143,000, up from a low of £5,200 in 1997 (3.6). There were nearly 6,900 homes bought in London through Help to Buy in 2022/23, with 71% of those in Outer London (3.7).

London's housing market also generates substantial tax revenues for national government. In 2021/22, residential transactions in London generated £3.92 billion in receipts for the Exchequer, with purchases by second property buyers, investors and non-resident buyers paying particularly high rates (3.8). The last two years have seen low

availability of homes for sale or to rent, but while the number of recently added properties for sale in London on the Rightmove portal has stayed relatively steady in the last year, the number of listings for rental properties has increased (3.9).

According to Rightmove data, the average advertised rent for new tenancies in London fell during the pandemic but then increased rapidly, with annual growth peaking at 16.0% in 2022 Q3 and then slowing to 13.7% in 2023 Q2 (3.10). The affordability of average private rents (including ongoing as well as new tenancies) in London compared to average earnings continued to improve in 2022, as earnings rose by more than rents (3.11).

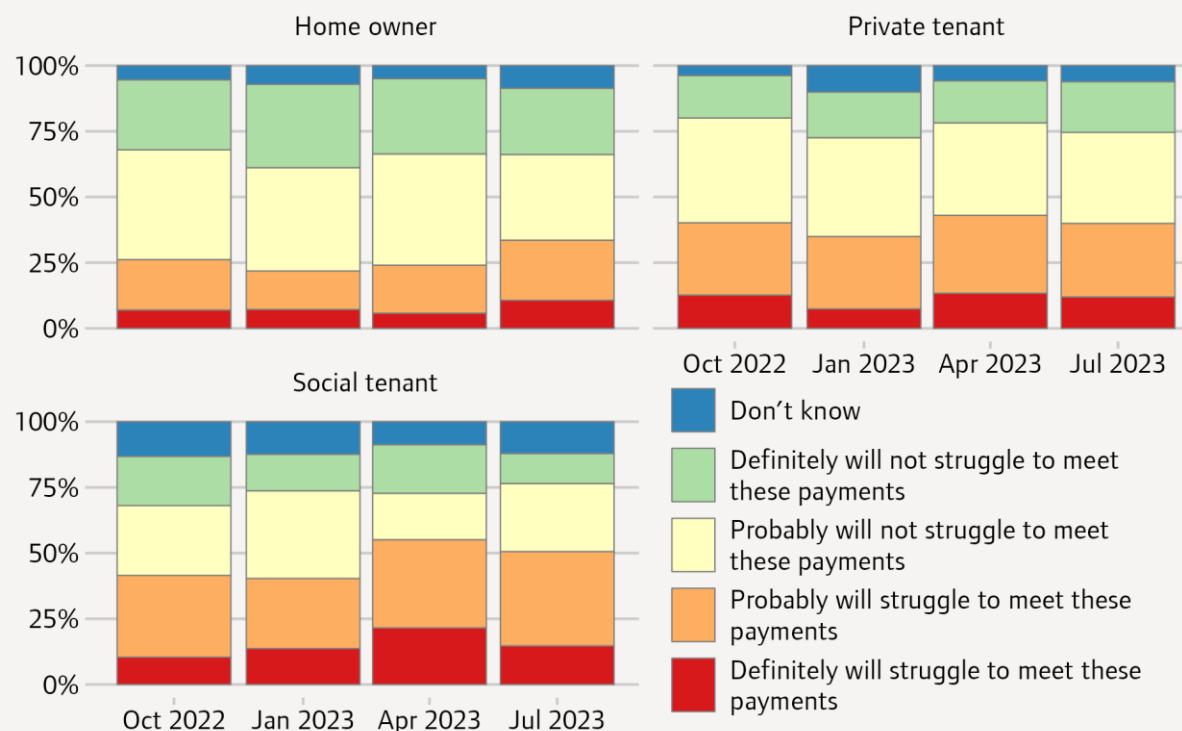
Median monthly private rents in London are almost double those elsewhere in England, with a one-bedroom home in London on average costing 42% more than a three-bed home in other regions (3.12). Median private rents for two-bedroom homes have risen in most boroughs, with particularly large increases in Inner London boroughs including Westminster and Kensington and Chelsea (3.13).

The number of Housing Benefit and Universal Credit recipients in London rose sharply during the pandemic and has fallen only slightly since (3.14). Average rents for social rented homes in London surpassed 2015/16 levels in 2021/22 for the first time since legislated annual rent reductions, while average rents for Affordable Rent remain below 2016 levels (3.15).

After falling sharply during the pandemic, activity in London's short-term lettings market has picked up again in 2023, as indicated by the number of Airbnb listings with a recent review (3.16).

3.1 Polling shows 51% of social housing tenants and 40% of private tenants said in July 2023 that they definitely or probably will struggle to meet their housing payments in the next six months, while the proportion of home owners who expect to struggle has increased

**Whether Londoners expect to struggle to meet housing payments by tenure, October 2022 to July 2023**



- The regular polling on the cost of living carried out by YouGov on behalf of the GLA asks a representative sample of London adults whether or not they expect to struggle to meet housing payments (rent, mortgage or other housing costs) in the next six months.
- In October 2022, 26% of home owners, 40% of private tenants and 42% of social housing tenants said they definitely or probably would struggle to meet these costs over the following six months.
- By July 2023, the proportion of home owners who said they definitely or probably would struggle to meet these payments had increased to 34%, compared to 40% of private tenants (in line with previous months) and 51% of social housing tenants.

*YouGov cost of living polling for GLA. See Appendix for details of methods, sample sizes and fieldwork dates. The homeowner category includes mortgaged owners and shared owners but not outright owners. The question asked was "And do you think you will, or will not struggle to meet the following payments in the next six months?"*

3.2 Londoners from a Black or other minority ethnicity background were both more likely to have struggled to meet housing payments in the last six months and less confident about meeting them without a struggle in the next six months

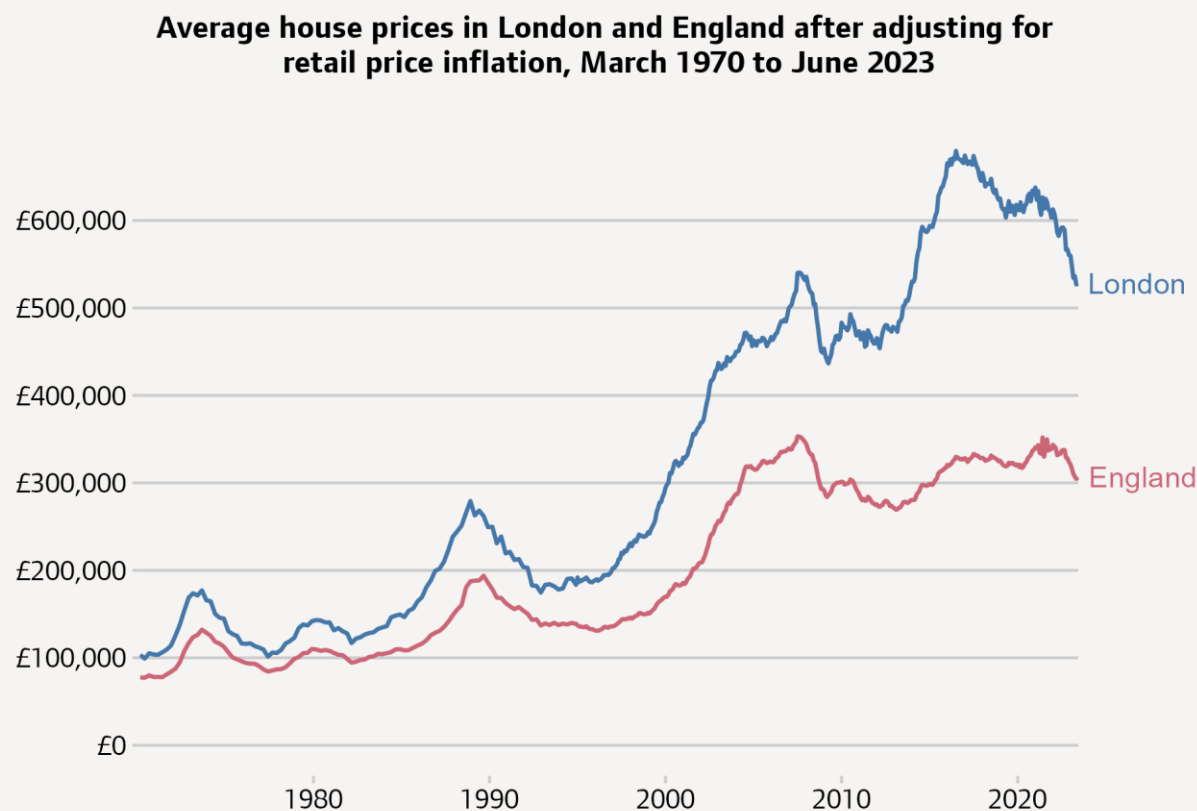
**Whether Londoners have struggled and expect to struggle to meet housing payments by ethnicity, July 2023**



- The July 2023 survey on the cost of living carried out by YouGov on behalf of the GLA asked a representative sample of London adults whether or not they had struggled to meet housing payments (rent, mortgage or other housing costs) in the last six months, and whether or not they expected to struggle to meet these payments in the next six months.
- 60% of White adults said they had kept up with housing payments without any difficulties, leaving 40% who had fallen behind (on one or all payments) or had struggled at least once. 53% of Asian adults, 57% of Black adults and 52% of those of Mixed or Other ethnicity said they had fallen behind on at least one payment or had struggled at least once.
- When looking to the next six months, 57% of White adults said they will not struggle to meet housing payments, compared to 41% of Asian adults, 46% of Black adults and only 37% of those of Mixed or Other ethnicity.

*YouGov cost of living polling for GLA. Questions asked were "Thinking about the last six months, have you, or have you not, been able to meet payments on the following?" and "And do you think you will, or will not struggle to meet the following payments in the next six months?". The latter question was asked separately on rent and mortgage payments and the responses have been aggregated. The figures for the Black, Asian and Other and Mixed ethnicity categories are based on samples of less than 100 adults and should be treated with additional caution. See Appendix for details of methods, sample sizes and fieldwork dates.*

- 3.3 After adjusting for changes in the purchasing power of the pound, the average London house price in June 2023 was 10.2% lower than its level in June 2022 but 8% higher than 10 years ago



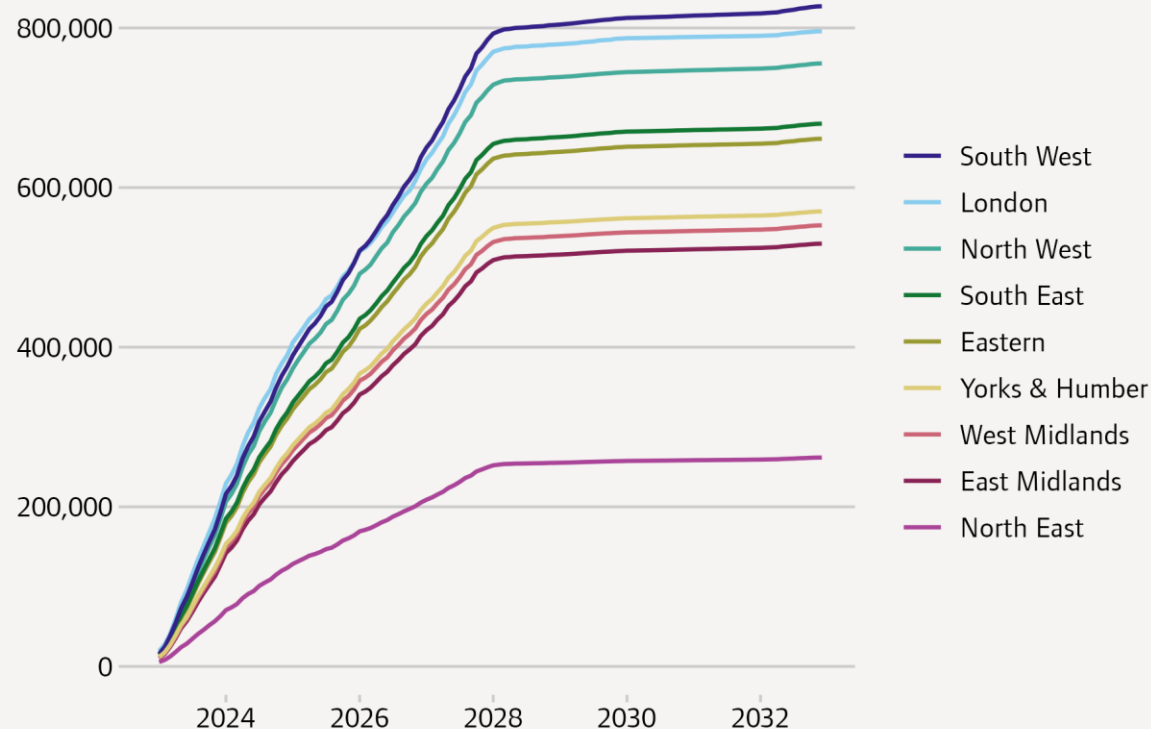
- London's average house price was £528,000 in June 2023, according to the UK House Price Index. In nominal terms this was a fall of 0.6% from June 2022, but after adjusting for changes in the purchasing power of the pound as measured by retail price inflation (which was running at 10.7% in June 2023), it was 10.2% lower.
- In real (inflation-adjusted) terms London's average house price is 22% lower than its peak in July 2016 at £679,500 (in July 2023).
- The average house price across England fell by 8% over the last year in real terms to £306,447, still slightly below its inflation-adjusted peak of £353,000 in July 2007.
- Average inflation-adjusted prices in London are now 7.9% above the level of 10 years ago, compared to an increase of 11.7% across England as a whole.

*UK House Price Index (UKHPI) adjusted for retail price inflation. Data is quarterly until the end of 1994 and monthly thereafter. Data for recent months is subject to revision as it is based on a relatively small number of transactions.*



3.4 At the end of 2022 there were around 762,000 outstanding fixed-rate mortgages in London that were due to come to the end of their fixed-rate period by the end of 2027

**Cumulative number of outstanding regulated fixed-rate mortgages by region and month in which fixed-rate period is due to end, as at end 2022**

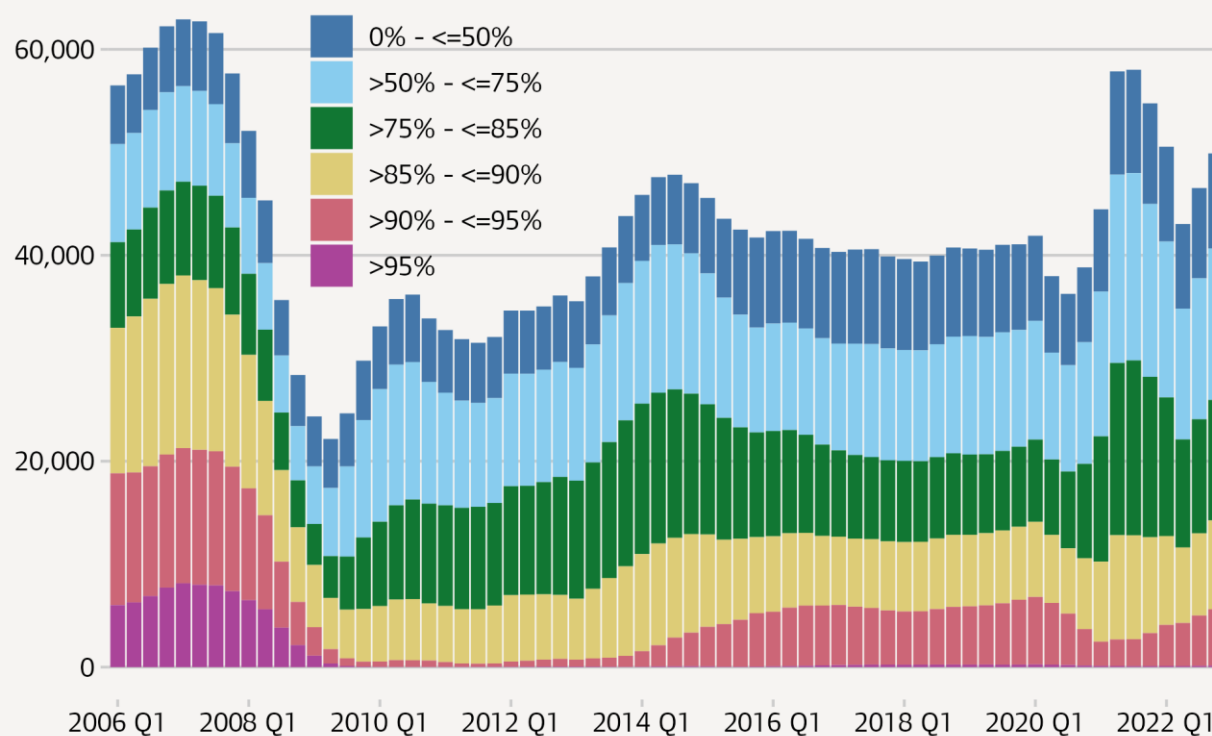


Financial Conduct Authority Product Sales Data (PSD007).

- The recent sharp increase in interest rates has focused attention on the number of households that are due to end the fixed-rate period of their mortgages, which in many cases would mean paying substantially higher monthly mortgage costs.
- Data published by the Financial Conduct Authority shows the number of outstanding regulated fixed-rate mortgages in each region at the end of 2022 and the month in which the fixed-rate period is due to end.
- There were 847,000 fixed-rate mortgages outstanding in London at the end of 2022, of which 206,000 were due to come off fixed rates in 2023, 301,000 in 2024 and 2025, and 256,000 in 2026 and 2027. The figures then drop sharply, indicating the relatively small number of mortgages on fixed-rate periods longer than five years.
- These figures do not include variable-rate mortgages, which were affected immediately by the interest rate increases in 2022.

3.5 The volume of mortgage lending to first-time buyers in London increased between the pandemic and the end of 2022, but the increase was concentrated among mortgages with low loan-to-value (LTV) ratios

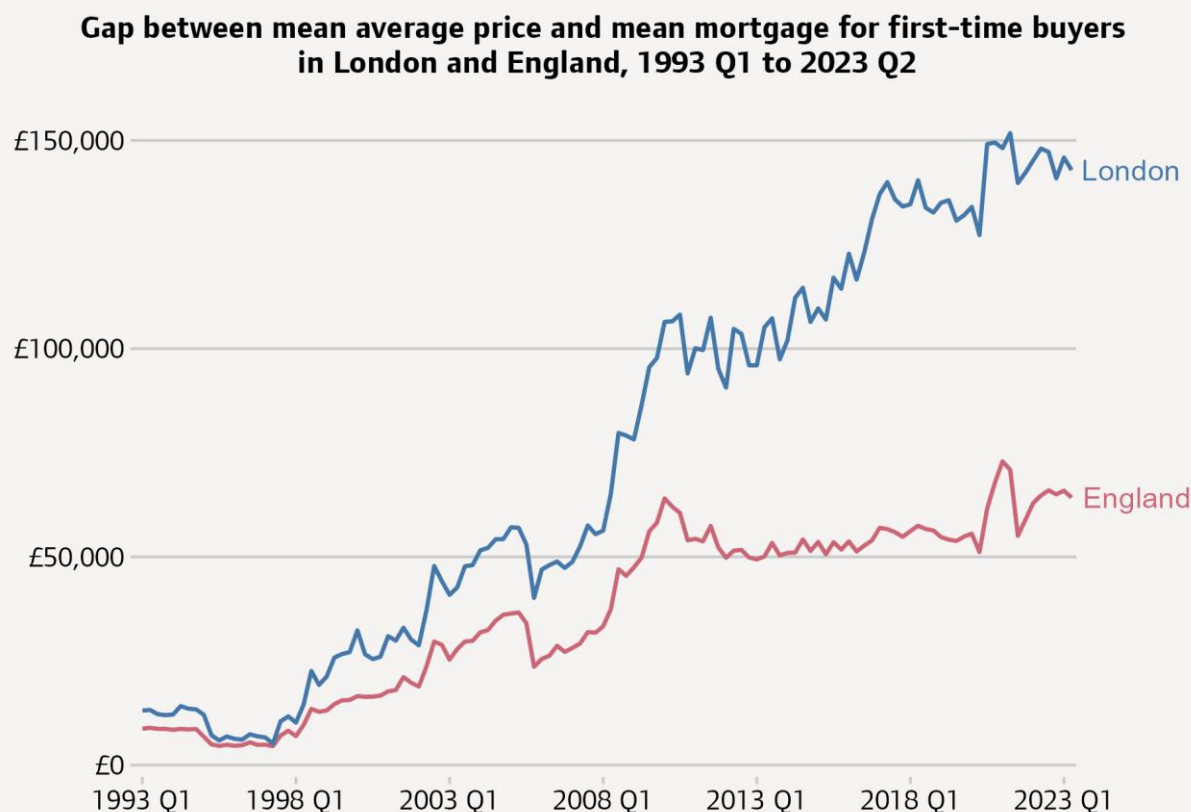
**Annualised number of loans to London first-time buyers, by loan-to-value ratio, quarterly 2006 Q1 to 2022 Q4**



FCA, Mortgages Product Sales Data.

- There were 49,890 loans to first-time buyers in London in 2022, down from 54,760 in 2021 but above the average since the global financial crisis.
- Mortgages with LTV ratios of more than 90% comprised over a third of lending to first-time buyers in London before the financial crisis, but nearly disappeared after it. The proportion of high-LTV mortgages then gradually increased, fell again during the pandemic and has partially recovered since then.
- The increase in lending to first-time buyers since the midst of the pandemic has overwhelmingly been driven by mortgages with LTV ratios of less than 85%, indicating that buyers with substantial savings or wealth (or access to Help to Buy) have disproportionately benefited from increased access to mortgages.
- The chart does not show any data since the end of 2022, so does not fully capture the impacts on mortgage lending of recent interest rate increases.

3.6 Those who buy a first home in London are now putting down an average deposit of around £143,000, up from a low of £5,200 in 1997

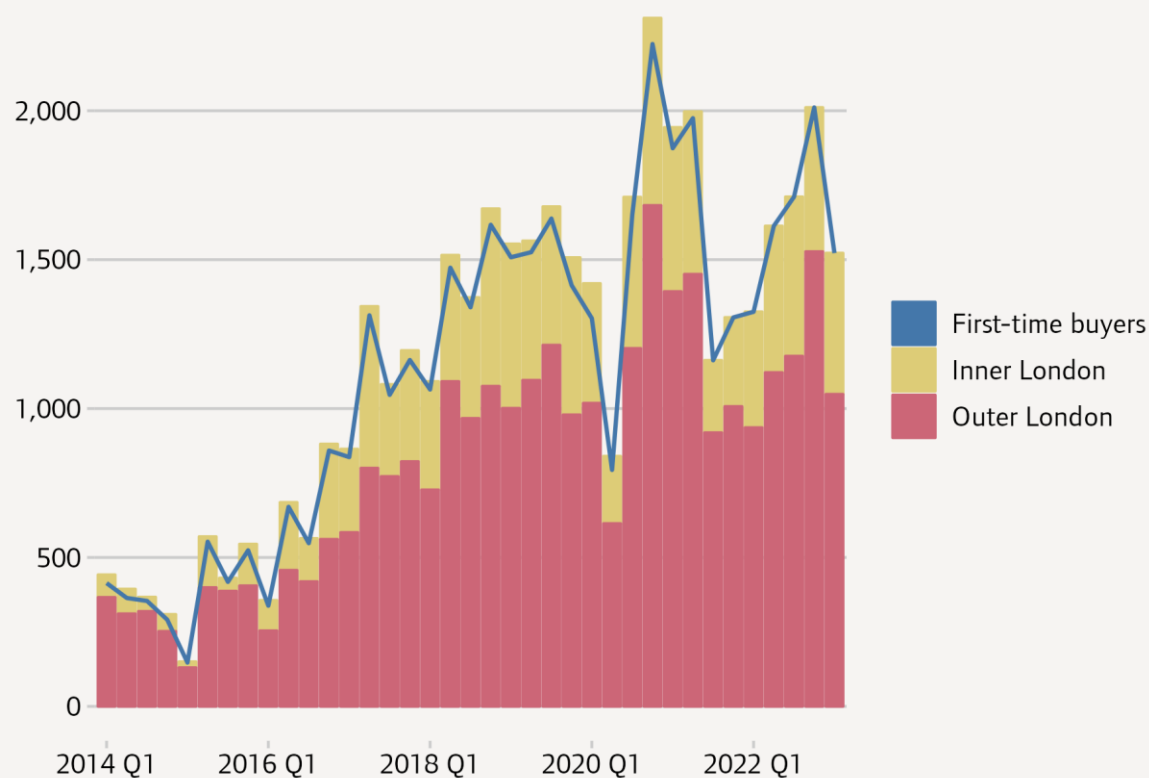


- A combination of rising prices and (since 2008) falling loan to value ratios has resulted in a huge increase in the gap between the mean average house price and the mean mortgage size for first-time buyers in London over the last 30 years. This widening gap implies a commensurate increase in the average size of mortgage deposits put down by first-time buyers.
- In 1993, the mean average gap for first-time buyers in London was £13,000 (unadjusted for inflation), already significantly higher than the average of £8,700 across England as a whole. In 1997 the average gap in London fell to just £5,200.
- As of mid-2023, the average gap in London had increased to £142,870, down from the peak of £151,730 in mid-2021. At the national level, the average gap was £64,244 in mid-2023, again down from the peak seen during the pandemic.

ONS House Price Index quarterly tables. These figures are calculated as the difference between the mean price and the mean advance, and are simple mean averages, unadjusted for inflation or the mix of properties sold. In recent years an increasing proportion of the gap is likely to be due to the use of Help to Buy (see next chart).

3.7 There were nearly 6,900 homes bought in London through Help to Buy in 2022/23, with 71% of those in Outer London

**Quarterly Help to Buy loans in London, 2014 Q1 to 2023 Q1**

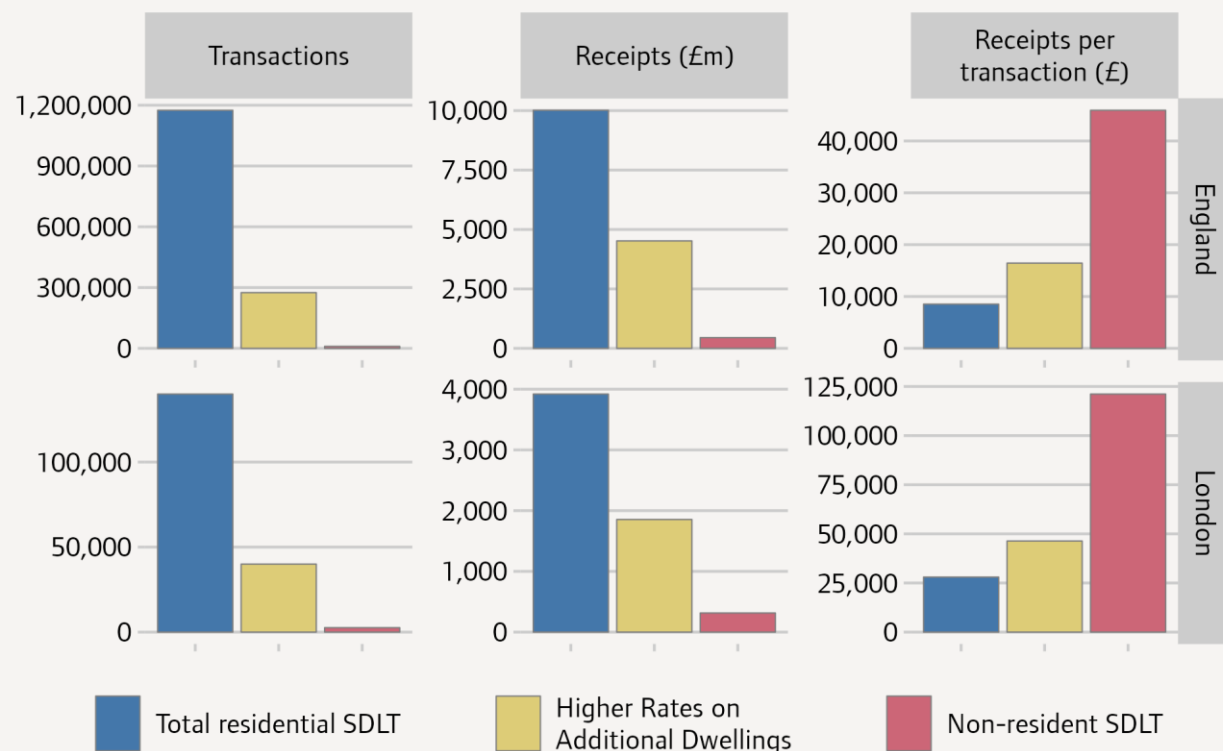


- Almost 6,860 new homes were bought in London with assistance from the government’s Help to Buy equity loan scheme in its final year, 2022/23. This represents an increase from 5,800 in 2021/22 and is the highest number of any year of the scheme. 4,870 of the purchases in 2022/23 were in Outer London boroughs and 1,985 were in Inner London.
- Since 2014, 42,560 homes have been bought using Help to Buy loans. 100% of homes purchased using Help to Buy in London in 2022/23 and 97.5% across the lifetime of the scheme were purchased by first-time buyers.
- The median income of London households buying with Help to Buy loan in 2022 was around £66,000 and the median purchase price of properties sold under the scheme in London was £450,000.

DLUHC, Help to Buy equity loan statistics.

3.8 In 2021-22 residential transactions in London generated £3.92 billion in receipts for the national Exchequer, with purchases by second property buyers, investors and non-resident buyers paying particularly high rates

### Stamp Duty Land Tax (SDLT) transactions and receipts in London and England, 2021-22

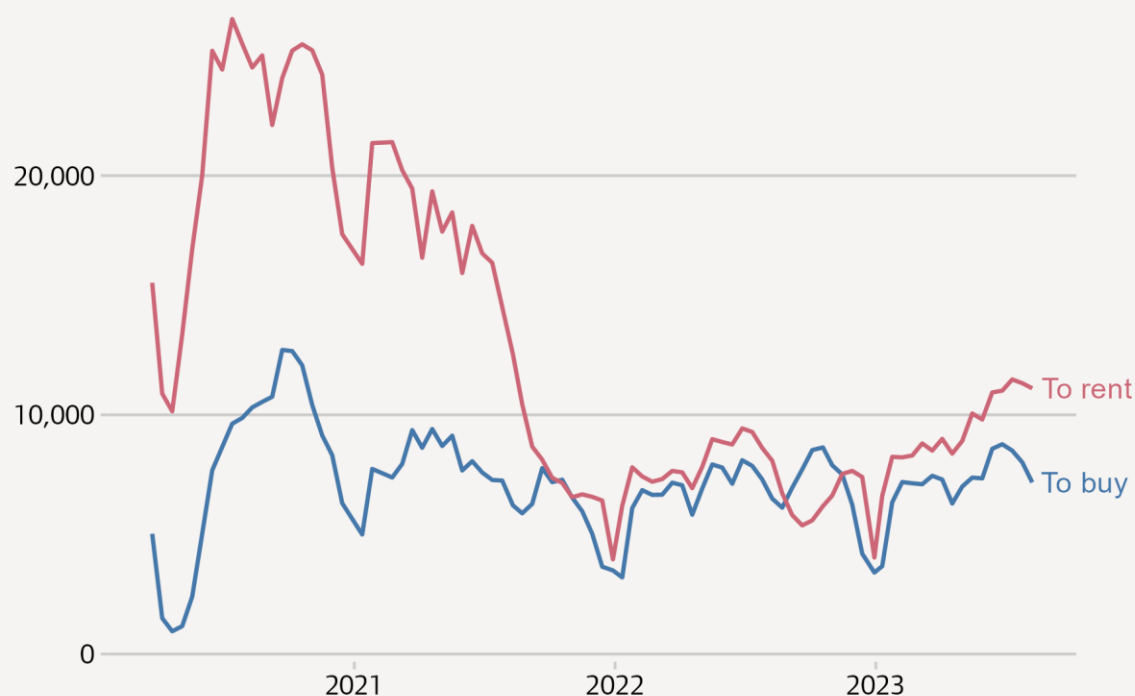


HMRC, UK Stamp Task statistics 2021 to 2022.

- According to HMRC statistics there were 140,000 residential transactions liable for Stamp Duty Land Tax in London in 2021-22, representing a 12% share of all transactions in England. The average receipt per transaction in London was £28,000 (compared to £8,500 across England), and total receipts were £3.92 billion.
- Out of the total, 40,000 transactions in London paid the Higher Rates on Additional Dwellings, which is charged on purchases of second homes and investment properties by those who already own residential property. London accounted for 15% of these transactions nationally, with an average receipt of £46,375 per transaction.
- 2021-22 was the first year in which HMRC levied a higher rate of Stamp Duty on purchases by non-UK resident buyers. There were 2,600 purchases in 2021-22 in this category, bringing in £315m to the national Exchequer at an average of £121,000 per transaction.

- 3.9 The number of recently added properties for sale in London on the Rightmove portal has stayed relatively steady since 2022, while the number of listings for rental properties has been increasing throughout 2023

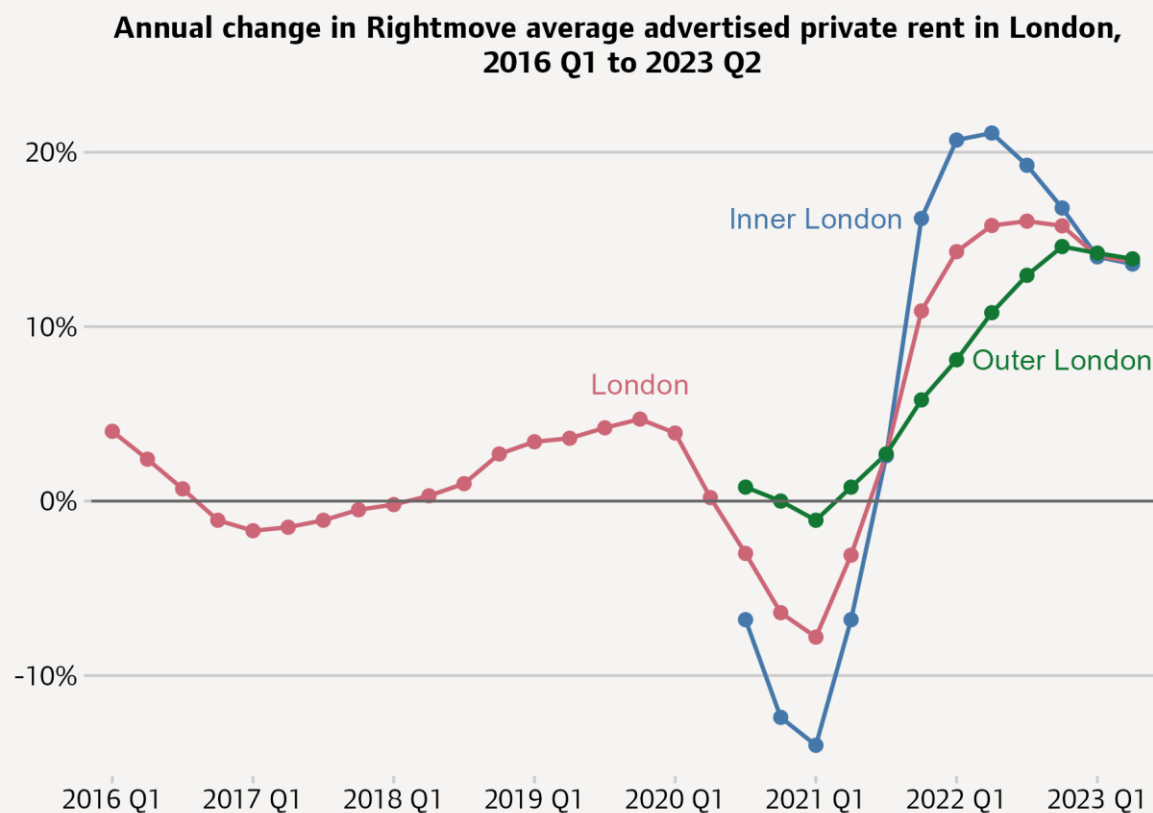
**Number of rent and sale listings in London that had been added to Rightmove in the last fortnight, March 2020 to August 2023**



- During the first lockdown, the number of rental listings in London postcodes that had been recently added to Rightmove fell by about a third, while the number of recent sale listings fell over 80%. Both recovered to well above their mid-March levels in the second half of 2020 but began to fall in summer 2021.
- As of August 2023, the number of recent sales listings was around 40% above pre-pandemic levels, although they may be expected to fall seasonally over the winter.
- The number of recently listed rental properties in London is currently almost 30% below the number listed just before the pandemic, but has increased from the extremely low levels seen in 2022. Supply is still below rental demand in London, resulting in a shortage of rental properties.

Data gathered from public Rightmove portal. The London area referred to covers only the London postcode districts (excluding those starting with 'CR', 'BR' etc).

3.10 According to Rightmove data, the average advertised rent for new tenancies in London fell during the pandemic but then increased rapidly, with annual growth peaking at 16.0% in 2022 Q3 and then slowing to 13.7% in 2023 Q2

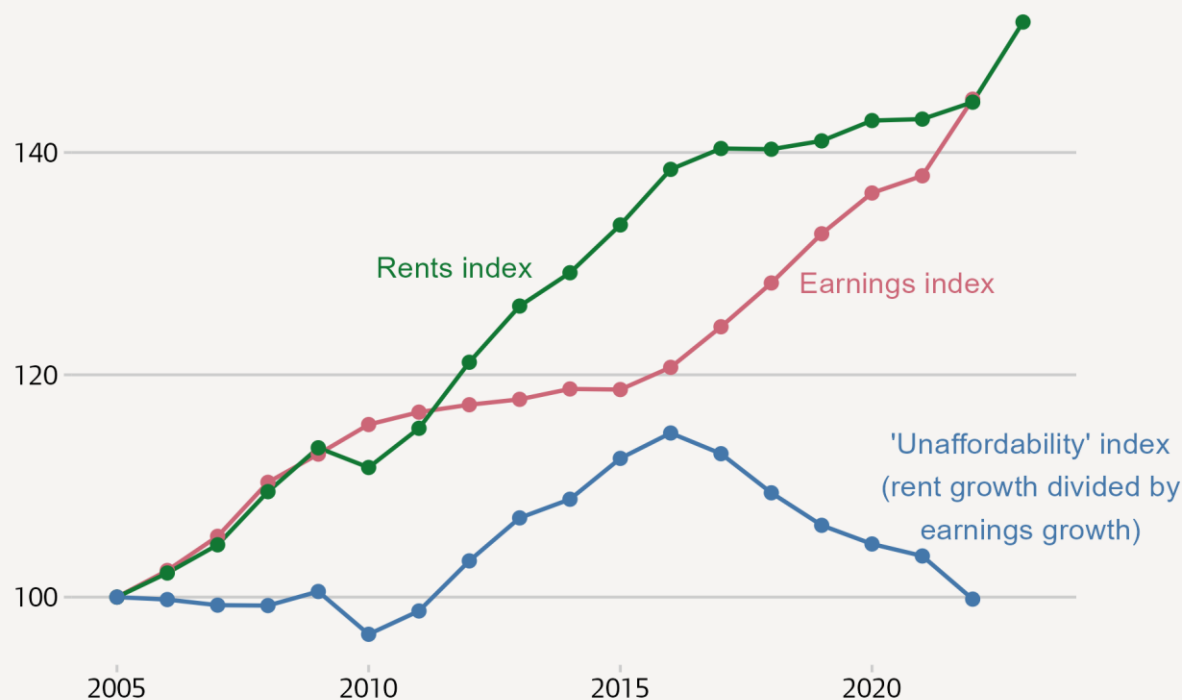


- Rightmove’s rents index shows that average advertised private rents in London grew by 13.7% between the second quarters of 2022 and 2023. This represents a fall from the peak annual growth rate of 16% in the third quarter of 2022.
- Private rents fell throughout 2020 to a larger extent in London than in other regions. Rents fell further in Inner London, and in the first quarter of 2021 were 14% lower than a year before. In the year to 2023 Q2 Inner London rents grew by 13.6%.
- Advertised rents in Outer London only fell annually by 1.1% in early 2021, and the rate of growth then steadily increased for the following two years before settling at 13.9% between the second quarters of 2022 and 2023.
- Across Britain as a whole advertised rents grew by 9.3% in the year to 2023 Q2.

GLA analysis of data from Rightmove. The split between Inner and Outer London is not available before 2020 Q3.

3.11 The affordability of average private rents (including ongoing as well as new tenancies) in London compared to average earnings continued to improve in 2022, as earnings rose by more than rents

**Index of cumulative change in private rents (on all tenancies), earnings and implied affordability in London, 2005 to 2023 (2005=100)**

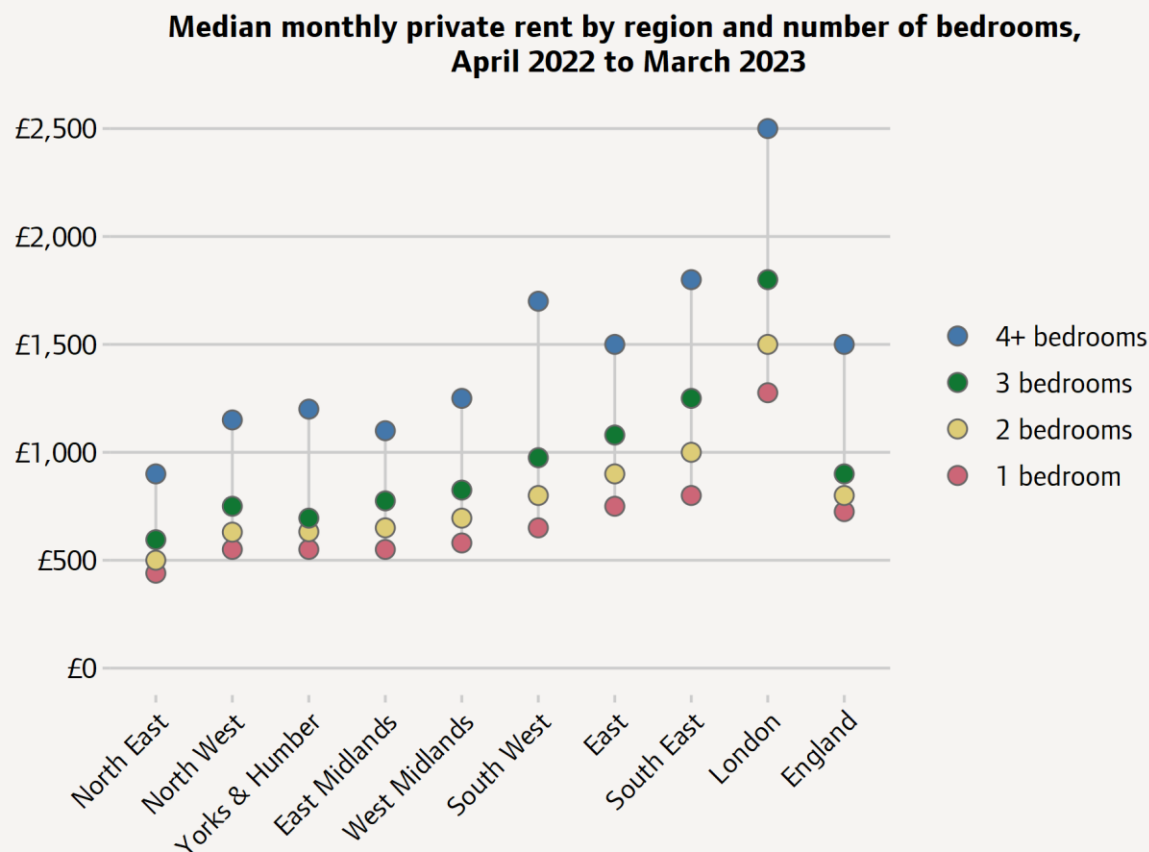


- The 'unaffordability' index shown here is the cumulative change in private rents (on all tenancies) divided by the cumulative change in earnings.
- Between 2010 and 2016 average private rents in London rose by more than earnings, leading to worse affordability. Between 2016 and 2022, rents were relatively stable in nominal terms while earnings increased, bringing affordability on this measure back towards where it was at the start of the 2010s.
- Rents increased sharply in the year to April 2023, while earnings data for 2023 is not yet available but is also likely to show an increase.
- The ONS rental data shown here reflects rents paid on all tenancies, while the Rightmove data in the previous chart (3.10) is for new tenancies only. The ONS data therefore reacts more slowly to changes in the market for new tenancies, and is likely to show significant growth into 2024. Another caveat to note is that earnings data does not reflect changes in income from benefits.

*Earnings: Median full-time weekly earnings by place of work, London. From ONS Annual Survey of Hours and Earnings, republished on London Datastore. Rents: ONS Index of Private Rental Housing Prices, April each year to match ASHE data. Affordability index: Rent index divided by median weekly earnings. The earnings index here is based on place of work rather than residence.*



3.12 Median monthly private rents in London are almost double those elsewhere in England, with a one-bedroom home in London on average costing 42% more than a three-bed home in other regions

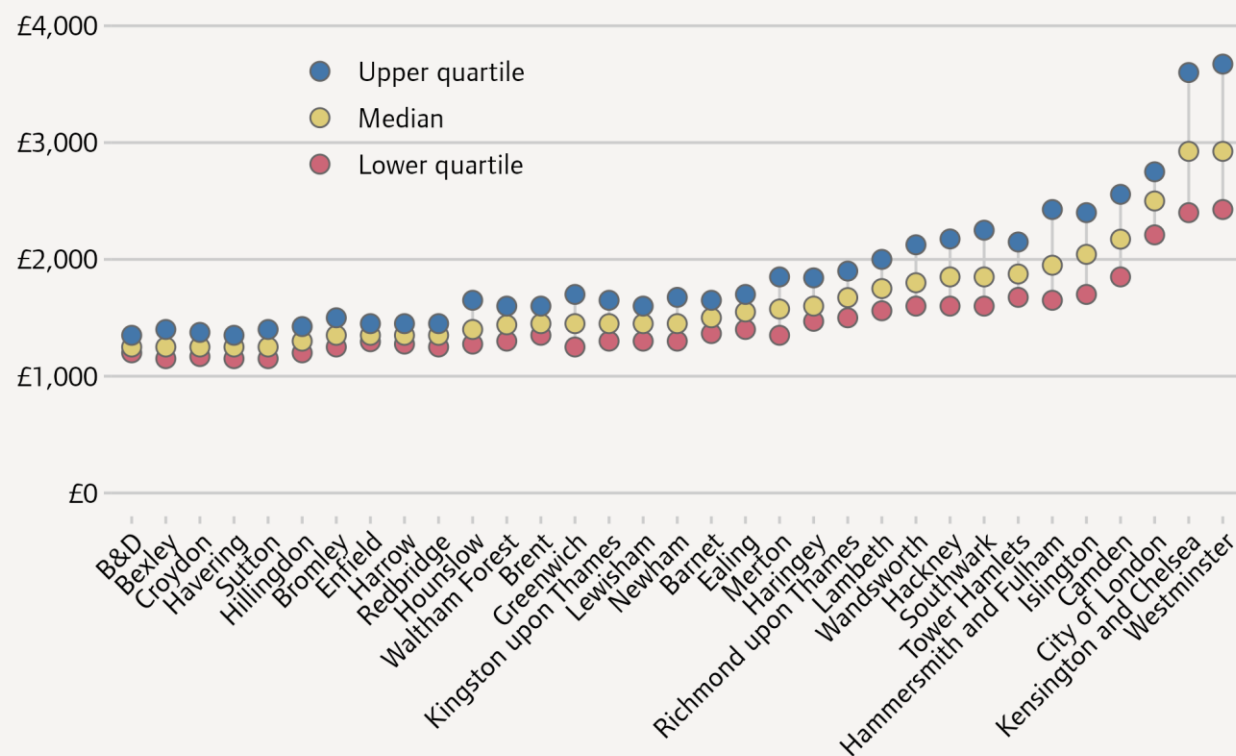


ONS private rental market summary statistics. These figures exclude any cases where the tenant receives Housing Benefit.

- In the year to March 2023, the median rent for a privately rented home in London was £1,500 per calendar month, almost twice as high as the median in England as a whole (£825). Although London rents remain considerably higher than in other regions, the gap between London and other regions stayed relatively steady over the year to March 2023. The gap between London and other regions may widen again as the rapid growth in advertised rents for new tenancies seen in London in the last year feeds through.
- 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 (£1,276) is higher than the median rent for a home with four or more bedrooms across all of the North and Midlands.
- 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.

3.13 Median private rents for two-bedroom homes have risen in most boroughs, with particularly large increases in Inner London boroughs including Westminster and Kensington and Chelsea

**Lower quartile, median and upper quartile monthly private rent for two bedroom homes by London borough, April 2022 to March 2023**

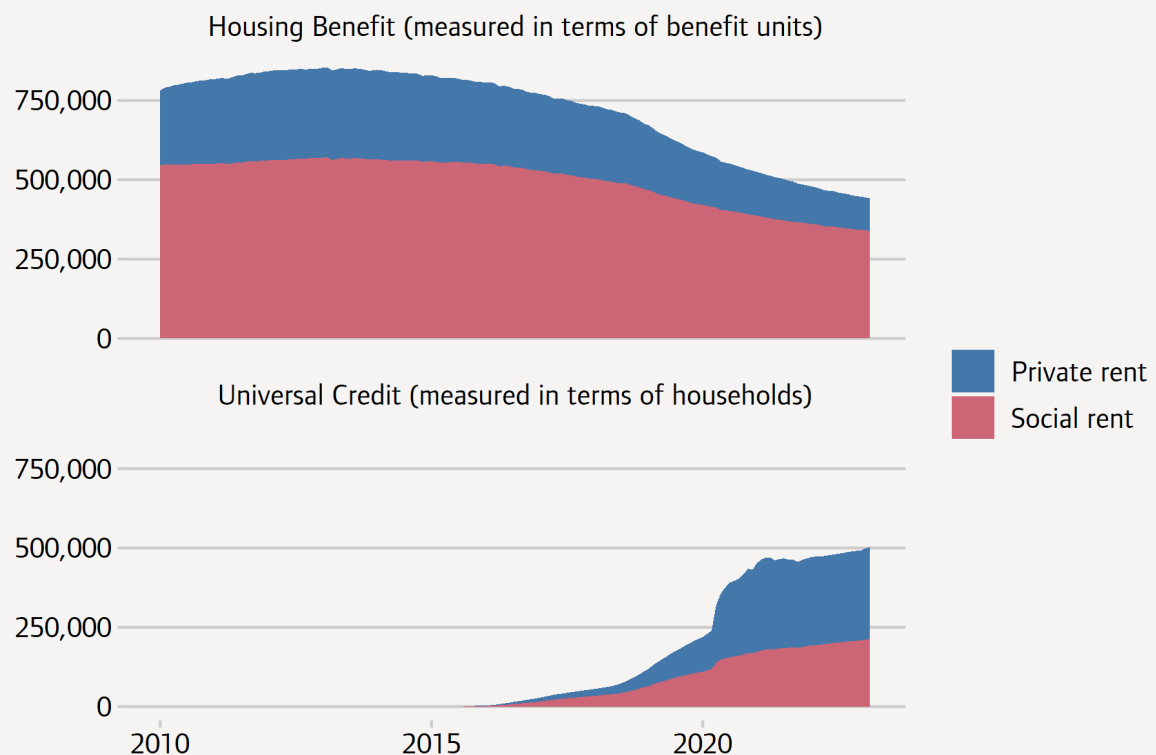


- The lowest median monthly rent for a two-bedroom home is £1,250 in Barking and Dagenham, Bexley, Croydon, Havering and Sutton, while the median rent in Kensington and Chelsea and Westminster is around 2.3 times higher at £2,925.
- Richmond-upon-Thames was the Outer London borough with the highest median private rent for a two-bedroom home (£1,673). Lewisham and Newham were the Inner London boroughs with the lowest median private rent for a two-bedroom home (£1,450).
- The boroughs with the highest median rents also had the greatest range between lower and upper quartile rents, indicating a significantly wider range of rent levels, perhaps reflecting a greater range in housing quality or neighbourhood-level rent premiums in those boroughs than in those with lower rents.

ONS private rental market summary statistics. These figures exclude any cases where the tenant receives Housing Benefit.

3.14 The number of Housing Benefit and Universal Credit recipients in London rose sharply during the pandemic and has fallen only slightly since

**Trend in Housing Benefit and Universal Credit caseload in London by tenure, 2010 to 2023**

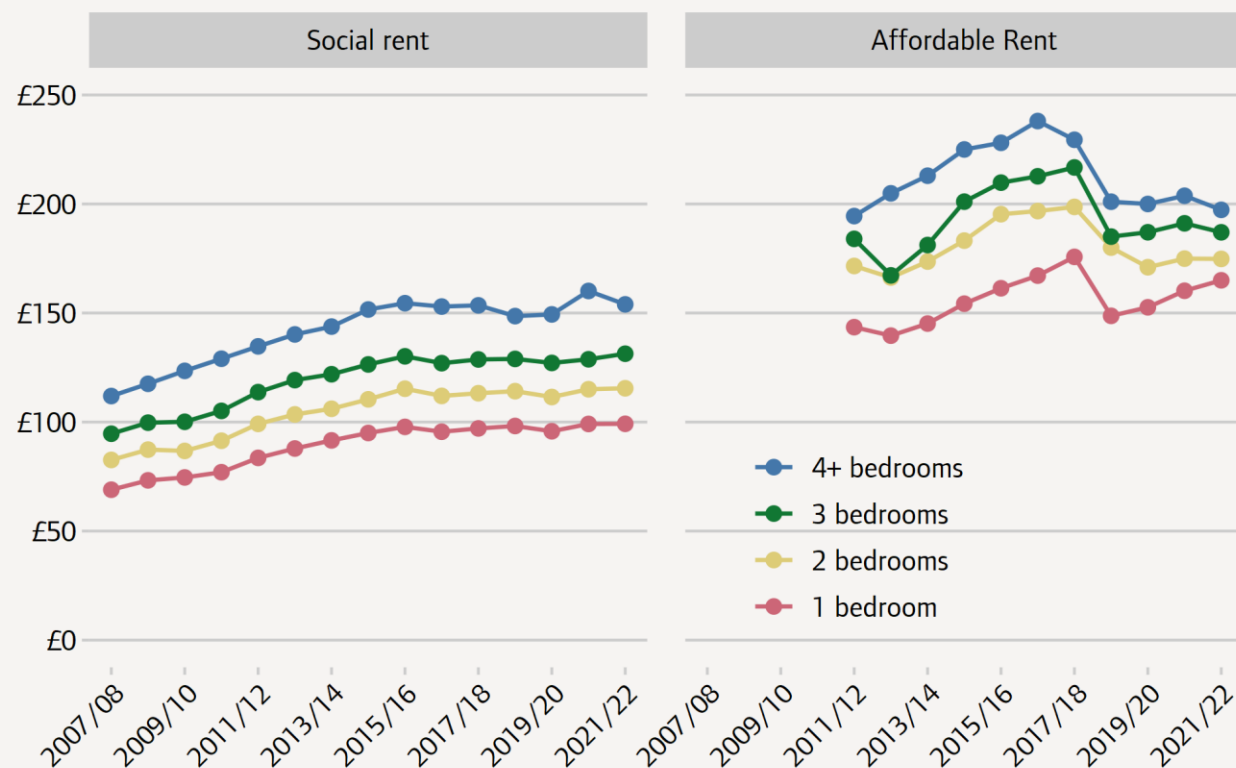


- The number of recipients of Housing Benefit or Universal Credit (with a housing costs component) in London was broadly steady in the years immediately preceding 2020, but then shot up due to the economic impacts of the pandemic. In January 2020 there were 811,000 recipients in London, but by January 2021 this figure had risen to 987,000. In January 2023 the total was only slightly smaller at 954,000.
- The vast majority of the increase during the pandemic was among private tenants. In January 2020 there were 271,000 private renting recipients, but this figure increased to 423,000 in January 2021 and has fallen back only slightly to 391,000 in January 2023. Over the same period the number of social renting recipients rose from 531,000 to 551,000.
- Universal Credit has accounted for the vast majority of new cases since its full-service roll-out in 2016, and it now makes up more than half of all housing cases in London.

Compiled by GLA from: 1998 to 2001: UK Housing Review and 2002 to 2023 DWP, Housing Benefit caseload statistics and Stat Xplore. Chart excludes a small number of cases where the tenure is unknown.

3.15 Average rents for social rented homes in London surpassed 2015/16 levels in 2021/22 for the first time since legislated annual rent reductions, while average rents for Affordable Rent remain below 2016 levels

**Median weekly rents for new social rent and Affordable Rent lettings in London, 2007/08 to 2021/22 (nominal terms)**

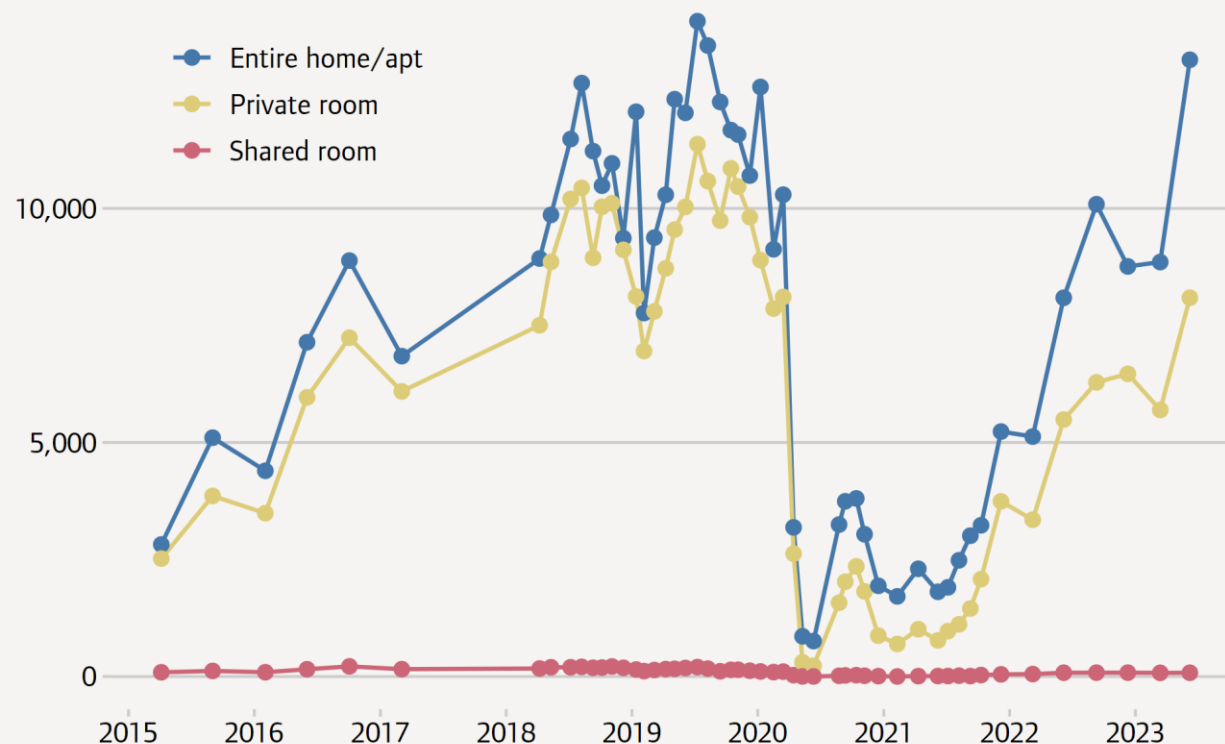


DLUHC, Social Housing Lettings in England summary tables. Weekly rent excludes supplementary charges such as service and support charges. The Affordable Rent category includes homes both above and below the London Affordable Rent benchmarks.

- Rents for new general needs social housing tenancies were broadly stable in nominal terms between 2015/16 and 2019/20, due to legislated annual rent reductions (offset by the construction of new homes at higher than average rents). Rents increased again over the past two years, taking the average for a two-bedroom home to £115.48 a week in 2021/22, above the level in 2015/16 for the first time.
- Affordable Rent homes, introduced by the coalition government, could be let at rents up to 80% of the equivalent market rent. The average rent for a two-bedroom Affordable Rent home in London peaked at £199 a week in 2017/18.
- This figure then fell, as more homes began to be completed at the Mayor’s new London Affordable Rent, which set benchmark rents based on social rent levels. As a result, average rents for two-bedroom Affordable Rent homes fell to £171 a week in 2019/20, before rising in 2020/21 to £175 a week, and stayed steady in 2021/22.

3.16 After falling sharply during the pandemic, activity in London’s short-term lettings market has picked up again in 2023, as indicated by the number of Airbnb listings with a recent review

**Trend in number of property listings in London on Airbnb with a review in the last 30 days, by listing type**



Data from InsideAirbnb.com.

- From early 2018 to early 2020, the total number of Airbnb listings in London that had received a review in the last month averaged around 20,000, with slightly more listings for entire homes than for private rooms.
- After lockdown was imposed in March 2020, the number of listings with a recent review fell sharply, and only started to recover in late 2021.
- The ongoing recovery in London’s tourism market saw a renewed increase in short-term lettings activity in the last year, with the numbers of entire homes let overtaking pre-pandemic figures. In June 2023, there were 13,200 listings of entire homes that had received a review in the last month (compared to 12,000 in June 2019) and 8,100 private room listings with a recent review (compared to 10,000 in 2019).
- The total number of listings in June 2023 was 81,800, but many of them seem to be either inactive or not regularly rented out.

## 4. Housing needs

Just over 10,000 people were seen sleeping on the streets in London in 2021/22, of which 6,400 people were seen sleeping rough for the first time (chart 4.1). 1,853 people seen sleeping rough for the first time in 2022/22 spent more than one night on the streets, up 26% from last year (4.2). The number of people seen sleeping rough in London for the first time peaked immediately after the first lockdown, but has since fallen significantly to around pre-pandemic levels (4.3). The number of UK nationals seen sleeping rough increased by 8% in 2022/23 and the number of rough sleepers from Central or Eastern Europe rose by 29%, after large falls the previous year (4.4).

There were 14,320 households assessed as owed a new homelessness prevention or relief duty in London in 2023 Q1, and 3,170 households accepted as statutorily homeless (4.5). The proportion of households who became homeless due to the end of a private sector tenancy has continued to rise after falling during the pandemic (4.6). At the end of March 2023 there were just over 60,000 homeless households living in temporary accommodation arranged by London boroughs, including 76,970 children (4.7).

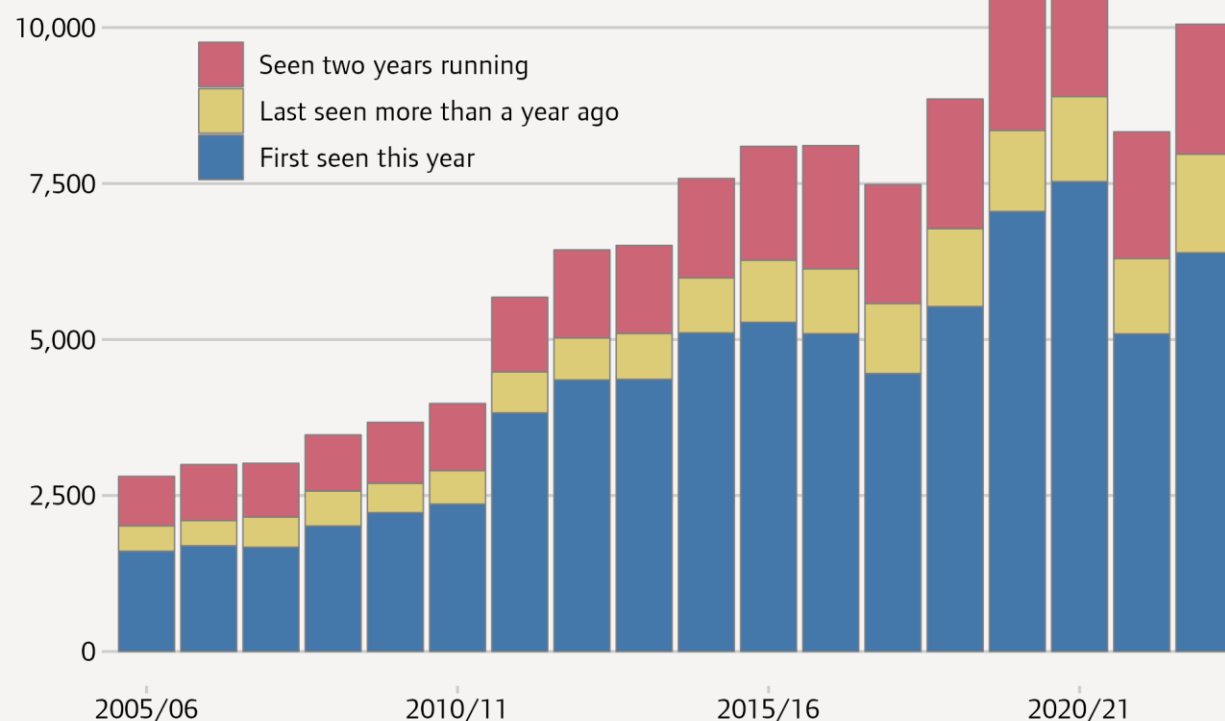
According to the latest English Housing Survey data, 7.8% of households in London are overcrowded – but this figure is likely to be an under-estimate due to the effects of the pandemic on the survey data (4.8).

The number of claims for mortgage and landlord repossessions fell sharply in London during the early pandemic period, but have risen again since then with private landlord claims exceeding pre-pandemic levels (4.9).

Households in London where at least one member uses a wheelchair some or all of the time are more likely to be dissatisfied with their accommodation than London households where no one uses a wheelchair, and also more likely to be dissatisfied than wheelchair users in the rest of England (4.10).

4.1 Just over 10,000 people were seen sleeping on the streets in London in 2022/23, of which 6,400 people were seen sleeping rough for the first time

**People seen sleeping rough in London, 2005/06 to 2022/23**

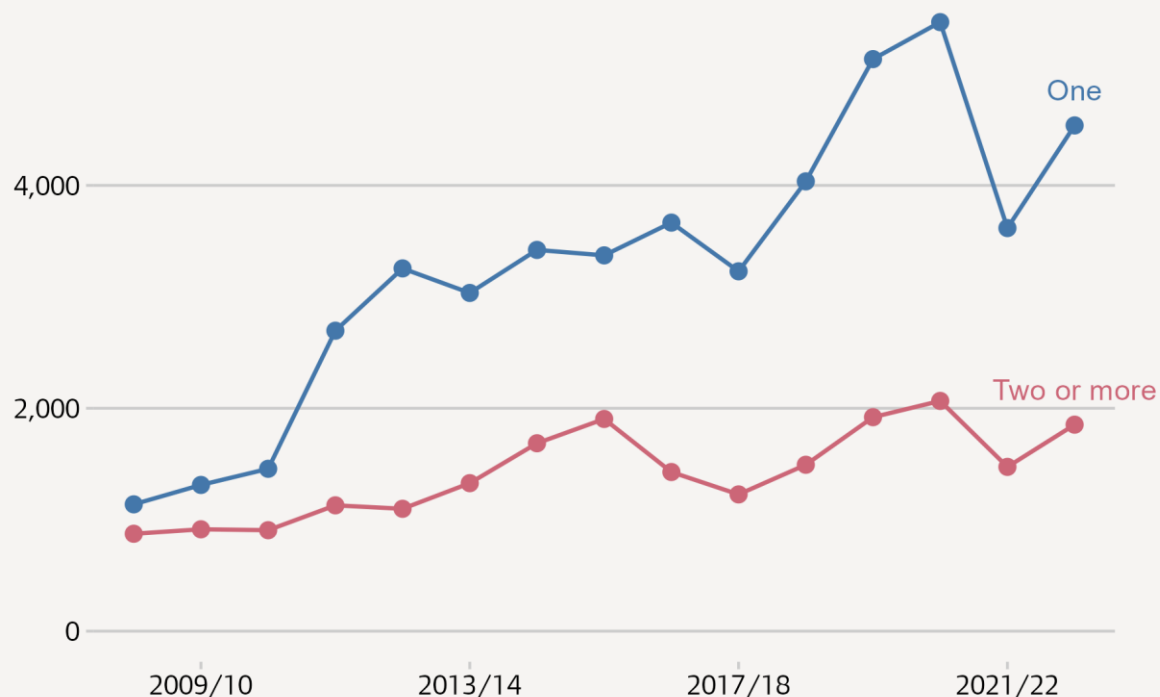


- 10,053 people were seen sleeping rough in London in 2022/23, a considerable increase from 8,329 in 2021/22 but lower than the peak of 11,018 in 2020/21.
- The largest group of rough sleepers in 2022/23 were the 6,391 people seen sleeping rough for the first time. This 'flow' of new people onto the streets increased by 26% in the last year and has tripled since 2005/06, 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 stayed steady over the past year, increasing by just 2.5% in 2022/23 to 2,084. However, this number has more than doubled since 2005/06.
- The 'returner' figure, which represents those who were last seen sleeping rough more than a year ago, increased by 31% in 2022/23 to 1,578, and has more than doubled in the last decade.

Combined Homelessness and Information Network (CHAIN) annual reports 2005/6 to 2022/23

4.2 1,853 people seen sleeping rough for the first time in 2022/23 spent more than one night on the streets, up 26% from last year

**Number of contacts with people seen sleeping rough for the first time in London, 2008/09 to 2022/23**



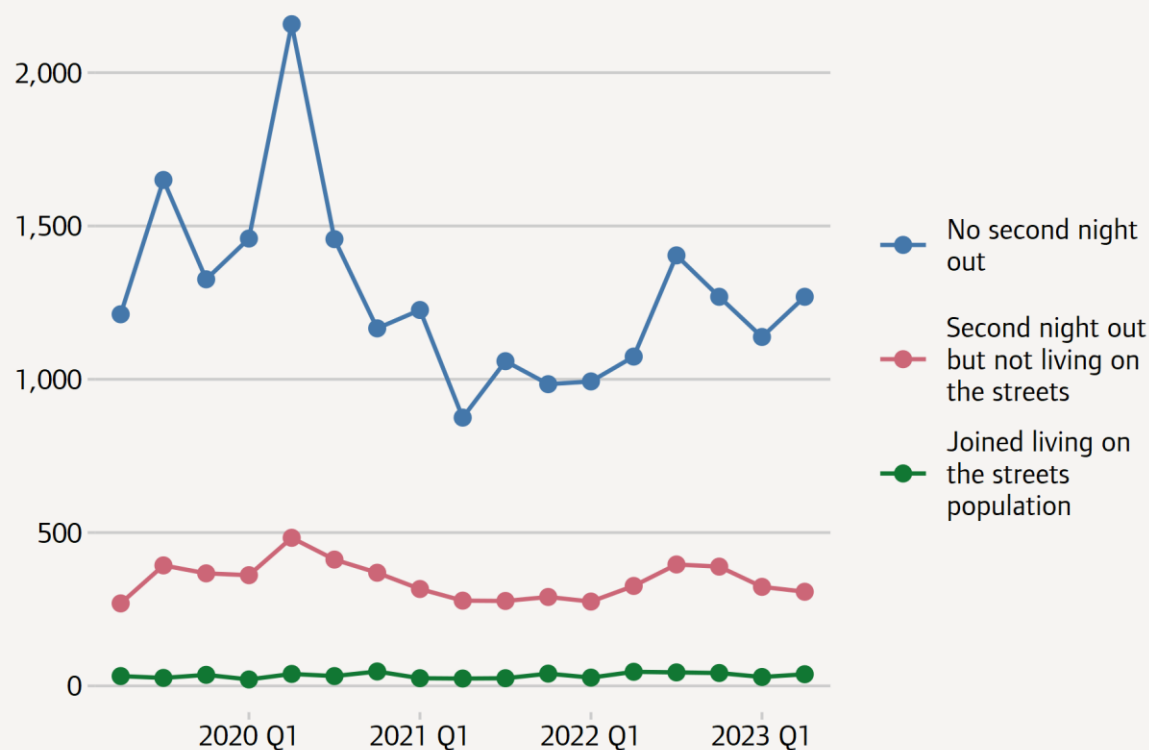
- 4,538 people, or 71% of those new to the streets in 2022/23, were seen sleeping rough only once in the year, up significantly from 3,617 in 2021/22 but below the peak in 2020/21.
- 1,853 new rough sleepers were seen more than once in 2022/23, 29% of the total. Of this group, almost half were seen just twice.
- The number of new rough sleepers seen on 6 or more occasions in 2022/23 was the highest among recent years, 18% higher than the recent peak in 2019/20. 119 people were seen sleeping rough more than ten times, again a significant increase from 76 in 2021/22 and 85 in 2020/21.

CHAIN annual reports 2008/09 to 2022/23



4.3 The number of people seen sleeping rough in London for the first time peaked immediately after the first lockdown, but has since fallen significantly to around pre-pandemic levels.

**Number of people seen sleeping rough in London for the first time by outcome, 2019 Q2 to 2023 Q2**

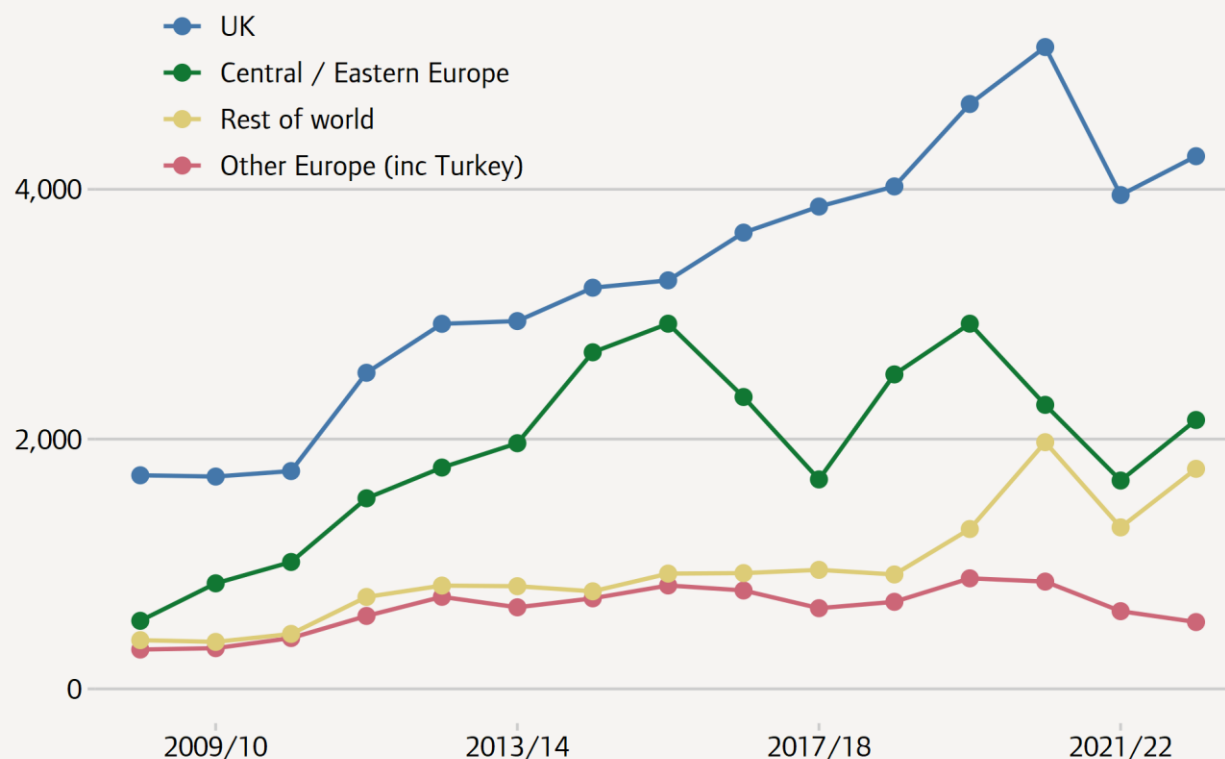


CHAIN quarterly rough sleeping reports 2019 to 2023

- In the second quarter of 2023 outreach teams recorded 1,614 people sleeping rough in London for the first time, up 7% from pre-lockdown figures. This figure peaked at 2,680 in Q2 2020, immediately after the first national lockdown was announced.
- The majority of new rough sleepers only spent one night sleeping rough, including during the height of lockdown measures. Schemes such as the Covid-19 emergency rough sleeper accommodation programmes run by the GLA and London boroughs helped to reduce the numbers of rough sleepers, particularly in early and mid-2020.
- Numbers of people recorded sleeping rough for two nights but not considered to be living on the streets also peaked in Q2 2020 but have fallen significantly since.
- By contrast, the number of rough sleepers who have joined the population living on the streets stayed relatively steady throughout the pandemic.

4.4 The number of UK nationals seen sleeping rough increased by 8% in 2022/23 and the number of rough sleepers from Central or Eastern Europe rose by 29%, after large falls the previous year

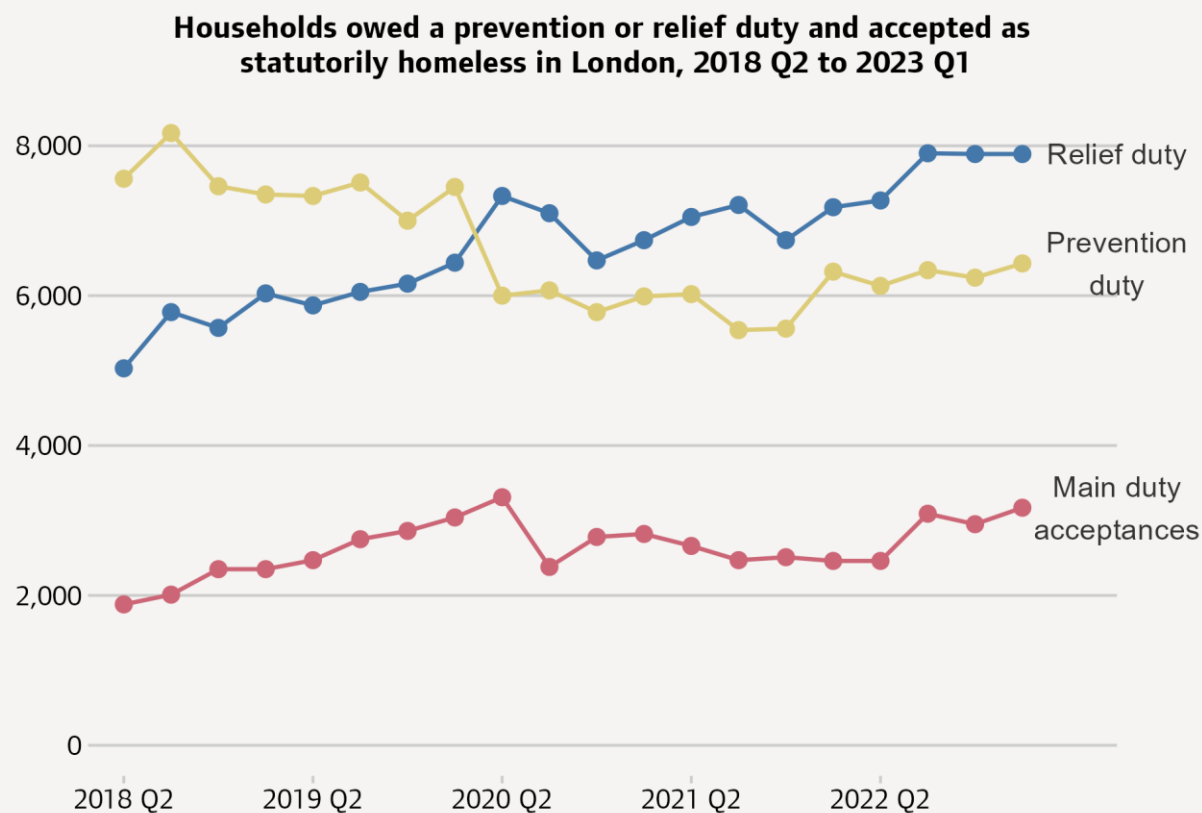
**Nationality of people seen sleeping rough in London, 2008/09 to 2022/23**



- People of 140 different nationalities were seen sleeping rough in London during 2022/23. UK nationals accounted for 4,265 of those seen sleeping rough in London in 2022/23, 42% of the total. This proportion is similar to the previous two years.
- People from Central or Eastern Europe seen sleeping rough made up the second largest group, after UK citizens. There was a significant increase in the number of people seen sleeping rough whose area of origin was not known, from 792 in 2021/22 to 1,338 in 2022/23.
- There were notable increases in people from the rest of the world seen rough sleeping, including people from Africa, Asia, the Americas and Australasia. The number of people seen sleeping rough who are nationals of countries in the Americas or Australasia increased to 191, the highest figure since this data began.

CHAIN annual reports 2008/09 to 2022/23

4.5 There were 14,320 households assessed as owed a new homelessness prevention or relief duty in London in 2023 Q1, and 3,170 households accepted as statutorily homeless

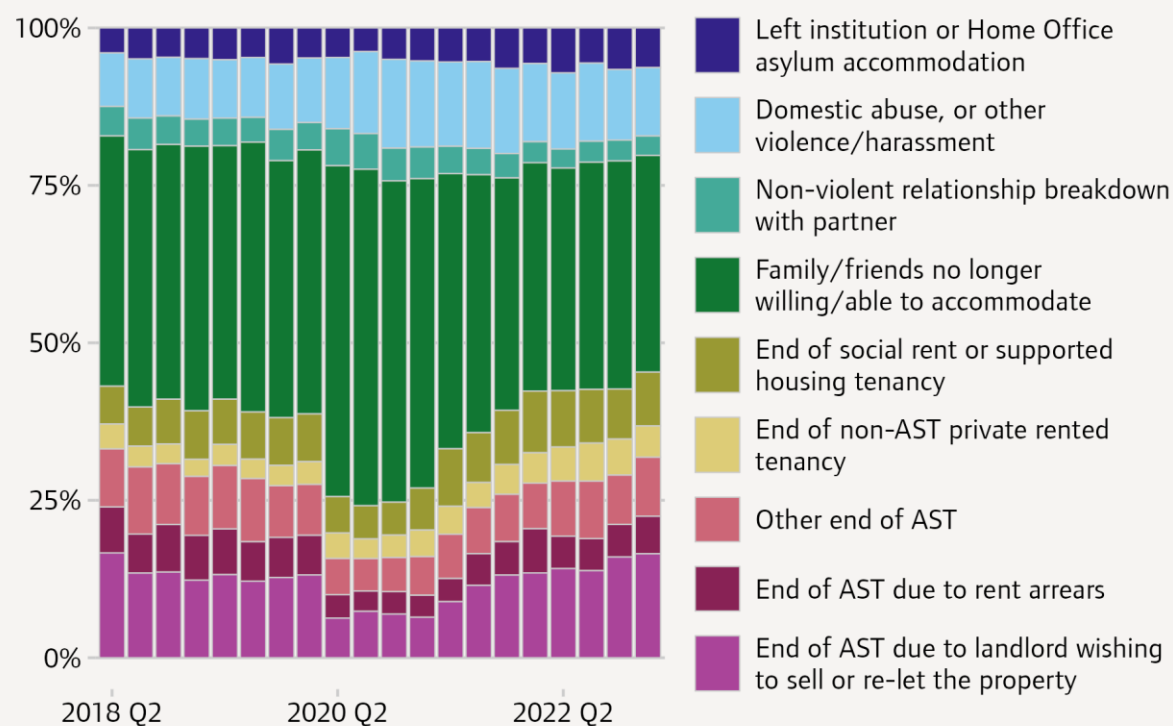


DLUHC live tables A1 and MD1, from the collection ‘Statutory homelessness in England’.

- The Homelessness Reduction Act came into force in 2018, creating new prevention and relief duties for local authorities. Under the 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 lasts 56 days, after which a household can be accepted as statutorily homeless and owed a main homelessness duty.
- There were 14,320 households assessed as owed a new prevention or relief duty in London in 2023 Q1 (the highest figure yet recorded), including 6,430 prevention and 7,890 relief duties. The number of households owed a prevention duty has fallen since the onset of the pandemic while the number already homeless and owed a relief duty has risen.
- There were 3,170 households accepted as statutorily homeless by London boroughs in 2023 Q1, after a sharp increase over the past nine months.

4.6 The proportion of households who became homeless due to the end of a private sector tenancy has continued to rise after falling during the pandemic

**Reasons given for loss of last settled home by households in London assessed as owed a homelessness prevention or relief duty, 2018 Q2 to 2023 Q1**

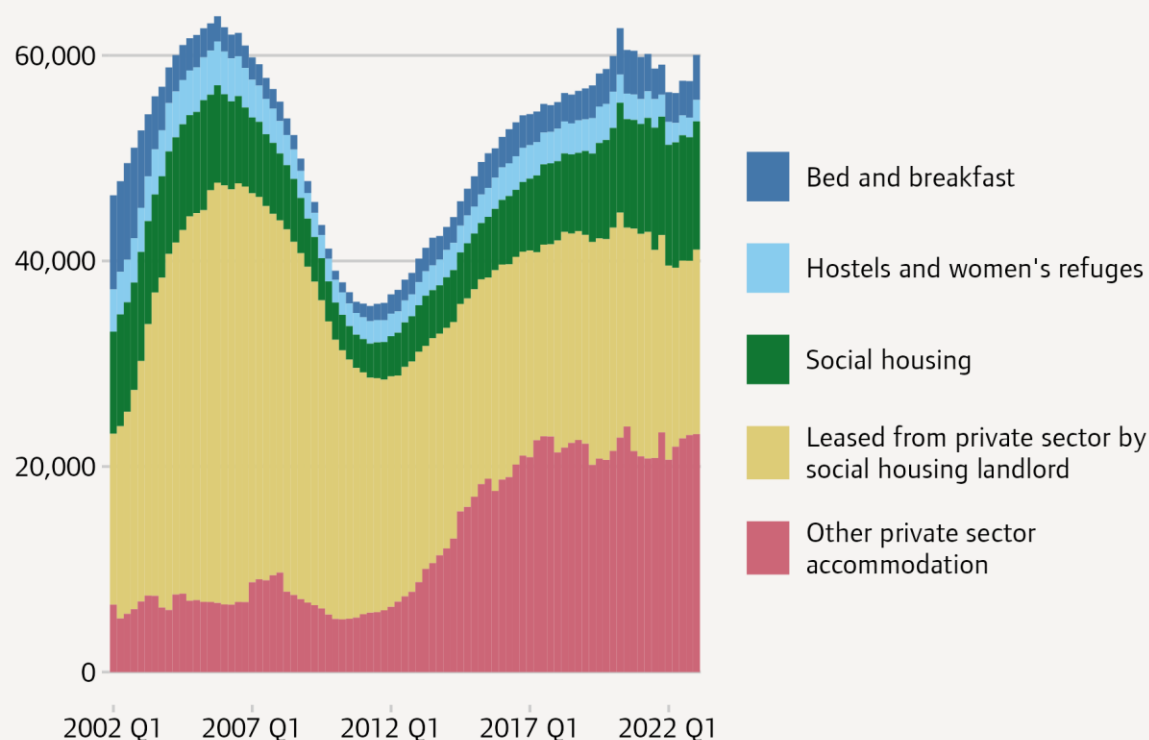


DLUHC, Statutory Homelessness statistics. Cases where the reason for the loss of the last settled home was unknown or fell into an undefined 'other' category are excluded.

- When assisting homeless households, local authorities record the reason the household became homeless. Under the new Homelessness Reduction Act reporting, this information is also recorded for all households who are owed a new prevention or relief duty.
- The most commonly recorded reasons (apart from the 'unknown or other reasons' category, not shown here) for becoming homeless are family and friends being no longer willing to accommodate the household and the end of a private sector Assured Shorthold Tenancy (AST).
- The introduction of a ban on evictions at the onset of the pandemic led to a sharp fall in the proportion of households who became homeless due to the end of an AST, but the lifting of this ban and the rise in rents has seen this figure rise again. At the same time, the proportion of households becoming homeless due to family and friends being no longer willing to accommodate them has fallen after rising during the pandemic.

4.7 At the end of March 2023 there were just over 60,000 homeless households living in temporary accommodation arranged by London boroughs, including 76,970 children

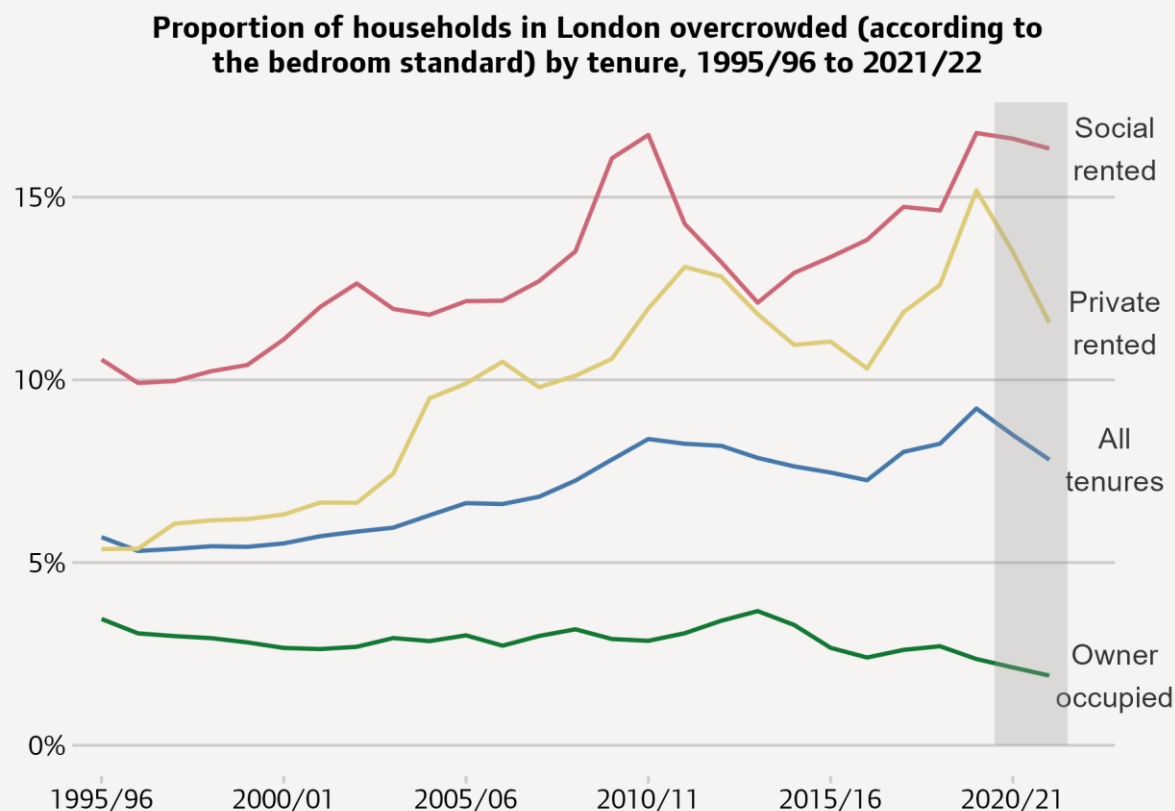
**Homeless households placed in temporary accommodation by London boroughs by type of accommodation, 2002 Q1 to 2023 Q1**



- At the end of March 2023, there were 60,040 homeless households in temporary accommodation arranged by London boroughs (up from 56,430 in March 2022 but still below the recent peak of 62,650 recorded in mid-2020). 39,590 of these households included children, with a total of 76,970 children between them. There were 104,510 households in temporary accommodation across England in March, a record.
- 24,120 of the households in temporary accommodation arranged by London boroughs were placed outside their home borough, the highest figure yet recorded.
- 4,370 households were living in bed and breakfast accommodation at the end of March 2023, after an increase in recent years to the highest levels since 2003. 17,950 homeless households were living in accommodation leased from the private sector by a social housing landlord, and a further 23,150 were in some other form of private sector accommodation. 12,480 were being temporarily accommodated in social housing, the highest figure on record.

Compiled by GLA from: Housing Finance Review 1995/96; UK Housing Review 2004/05; DLUHC live tables 775 and TA1.

4.8 According to the latest English Housing Survey data, 7.8% of households in London are overcrowded – but this figure is likely to be an under-estimate due to the effects of the pandemic on the survey data

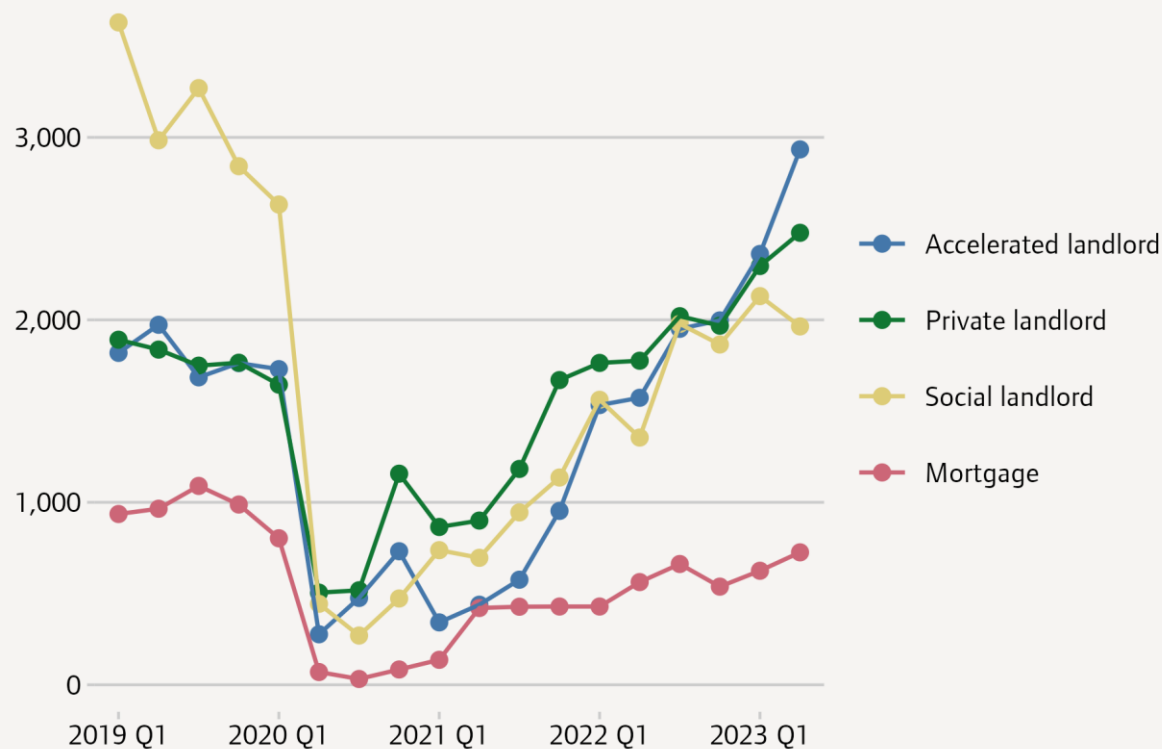


- When measured according to the bedroom standard – which compares the number of bedrooms available to a household to the number it requires based on the ages, genders and relationships of its members – overcrowding in London has increased over the last three decades, particularly in the private rented sector.
- According to the latest figures from the English Housing Survey, 7.8% of households in London were overcrowded in 2021/22, ranging from 16.3% of social renting households and 11.6% of private renting households to just 1.9% of owner occupiers.
- These figures are however likely to be an under-estimate, particularly in the private rented sector. The English Housing Survey does not include people who have temporarily left one household to join another, and there was a sharp increase in the number of people in this category during the pandemic-affected years of 2020/21 and (to a lesser extent) 2021/22.

*DLUHC, Survey of English Housing and English Housing Survey data, using three-year rolling averages. 2020/21 and 2021/22 likely to be an under-estimate due to effects of the pandemic on data collection. 2006 definition of bedroom standard and rolling three-year averages used. The shaded area represents the pandemic period.*

4.9 The number of claims for mortgage and landlord repossessions fell sharply in London during the early pandemic period, but have risen again since then with private landlord claims exceeding pre-pandemic levels

**Quarterly mortgage and landlord possession claims in London, 2019 Q1 to 2023 Q2**

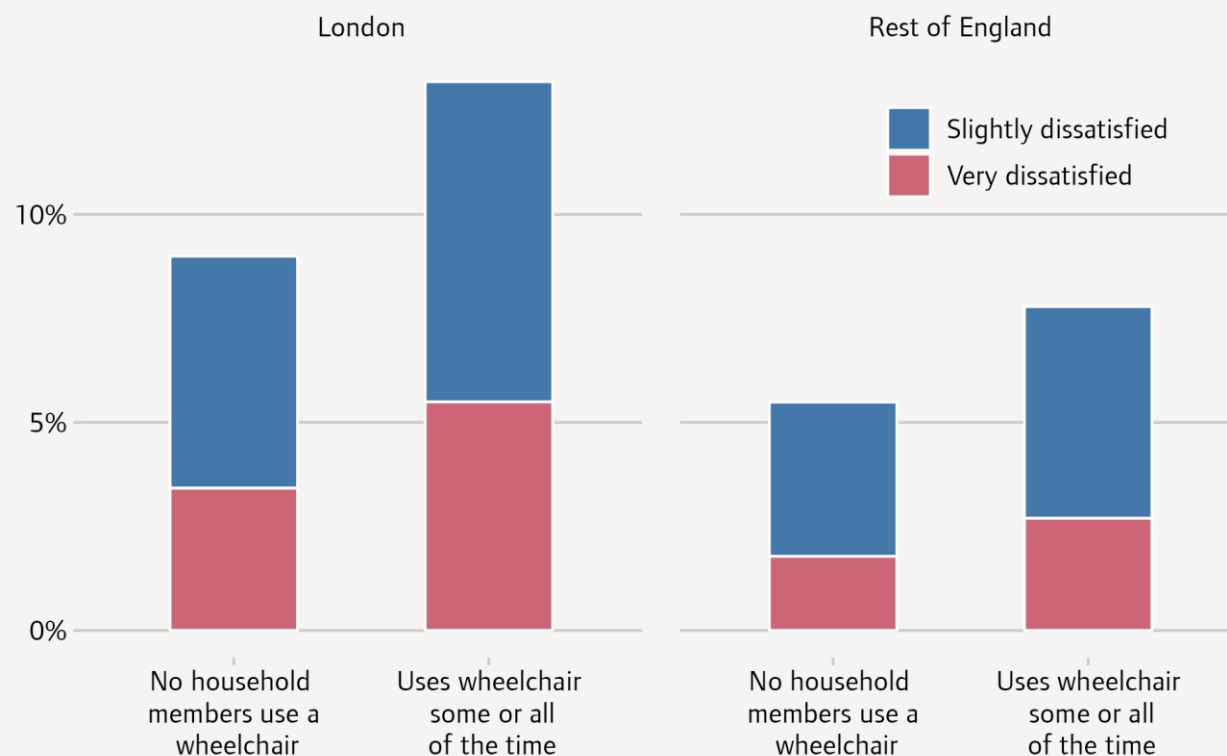


Ministry of Justice, Possession statistics.

- As a result of Financial Conduct Authority 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) in mid-2020.
- There were just 70 mortgage possession claims between March and June 2020 compared to 970 in Q2 2019, but by Q2 2023 the figure had risen again to 730.
- Across the three categories of landlord possession claims (social landlords, private landlords and the 'accelerated landlord' procedure, which mostly covers private landlords) the number of claims fell from 6,790 in Q2 2019 to 1,230 in Q2 2020, before increasing again to 7,375 in Q2 2023.
- As was the case before the pandemic, it is likely that some claims will not end up resulting in actual possessions.

4.10 Households in London where at least one member uses a wheelchair some or all of the time are more likely to be dissatisfied with their accommodation than households where no one uses a wheelchair

**Proportion of London households dissatisfied with accommodation by whether anyone in household uses a wheelchair**



*GLA analysis of English Housing Survey data, pooling data from 2013/14 to 2020/21 to ensure a large enough sample.*

- The English Housing Survey asks a random sample of households every few years how satisfied they are with their accommodation, and also whether anyone in the household uses a wheelchair some or all of the time. As the number of wheelchair users surveyed each year is small, data from 2013/14 to 2020/21 has been pooled for this analysis to ensure a large enough sample.
- Londoners are in general more likely to be dissatisfied with their accommodation than people in the rest of England. London households with wheelchair users are 5 percentage points more likely to be dissatisfied with their housing than those in the rest of England, and they are 4 percentage points more likely to be dissatisfied than London households where nobody uses a wheelchair.
- On average across the country, 7% of non-wheelchair using households are dissatisfied with their accommodation, compared to 11% of households with at least one member who uses a wheelchair.



## 5. Mobility and decent homes

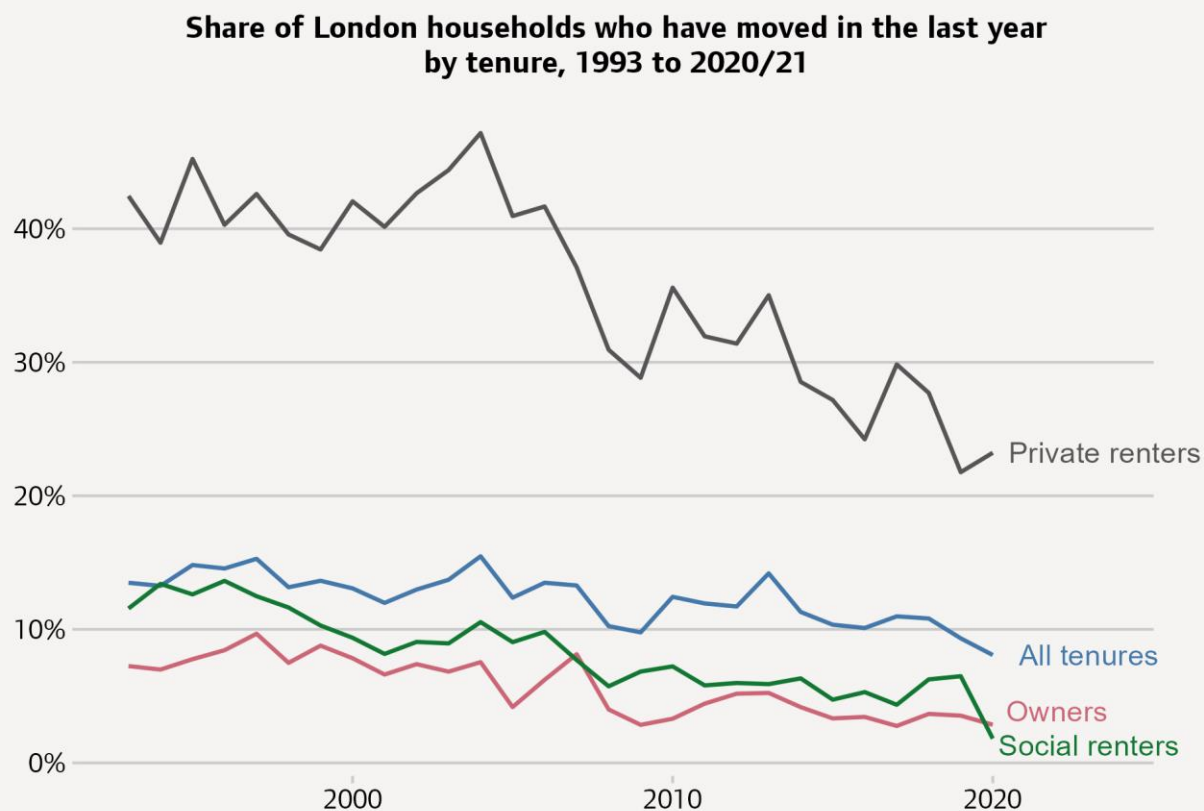
The proportion of London households who have moved in the last year has fallen since the turn of the millennium, particularly among private and social renting households (5.1). In particular, the number of households moving into social housing remains over three quarters lower than in the mid-1990s, although it rose slightly in 2021/22 after the dip during the pandemic (5.2). A comparison to other English regions shows that turnover in London's council housing sector has fallen much more than anywhere else in recent decades (5.3). The Mayor's Housing Moves scheme is aimed at increasing the mobility of social housing tenants in London, and in the last five years the scheme has freed up 810 social rented homes in London, with the highest figures in Greenwich and Southwark (5.4).

The Decent Homes Standard is a measure of whether homes provide sufficiently modern, warm and safe conditions, and in 2021 an estimated 9% of homes in London fell below the Standard, a figure that has fallen by around three quarters since 2006 (5.5). The number of affordable rented homes in London falling below the Decent Homes Standard reported by social housing landlords fell from 260,290 in 2005 to 37,590 in 2022 (5.6).

In the aftermath of the Grenfell Tower fire, the owners of buildings with unsafe cladding are required to remove it, with funding available to assist with a portion of the costs. As of July 2023, cladding remediation works had been completed on 227 of the 273 high-rise housing blocks identified in London with aluminium composite material (ACM) cladding systems unlikely to meet building regulations (5.7).

Per capita greenhouse gas emissions from domestic energy use have fallen by 41% in the last decade, although the rate of decline has slowed recently (5.8). The energy efficiency of London's existing housing stock has improved over time, but new build homes are still far more energy efficient on average (5.9). Progress in improving the energy efficiency of existing homes has picked up again after slowing in the mid-2010s (5.10). In July 2023, 40% of adults in London said they will struggle to pay their energy bills in the next six months, with much higher figure reported by those on low incomes, living in social housing or living with a disability (5.11).

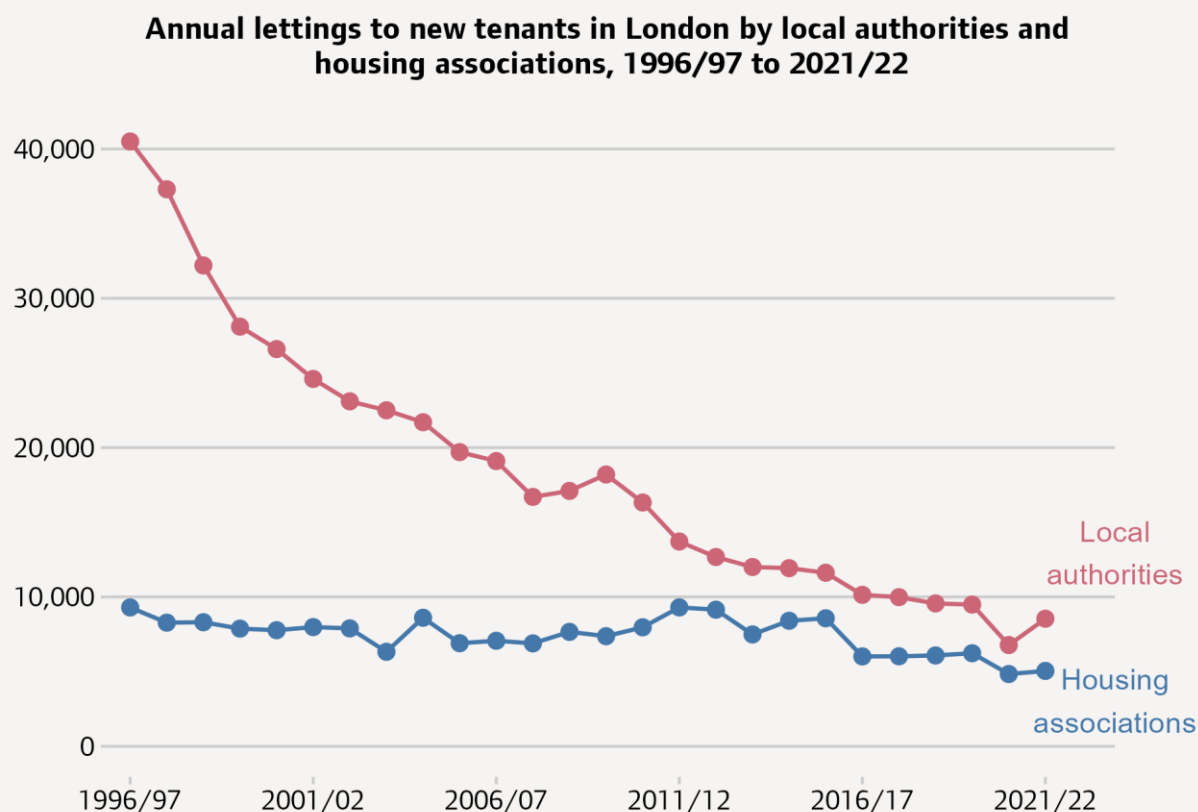
5.1 The proportion of London households who have moved in the last year has fallen since the turn of the millennium, particularly among private and social renting households



- In the mid to late 1990s, around 14% of households in London moved house in any given year. The rate of mobility was far higher in the private rented sector at around 40%, a little lower among social housing tenants at around 12% and substantially lower among homeowners at around 8%.
- But mobility rates have fallen in each tenure over time, particularly during the financial crisis of the late 2000s and the recent pandemic. In 2020/21, only 23% of private renting households, 3% of homeowner households and 2% of social renting households said they had moved house in the last year.
- The total rate of mobility fell to 8% in 2020/21. This overall rate has been relatively steady because the growth of the private rented sector over time means that more households are living in the most mobile tenure.

1993 to 2007 from the Survey of English Housing, 2008/09 to 2020/21 from the English Housing Survey. Financial years from 2008/09 to 2020/21 are represented on the chart as calendar years according to the initial year.

5.2 In particular, the number of households moving into social housing is more than three quarters lower than in the mid-1990s, although it rose slightly in 2021/22 after the dip during the pandemic

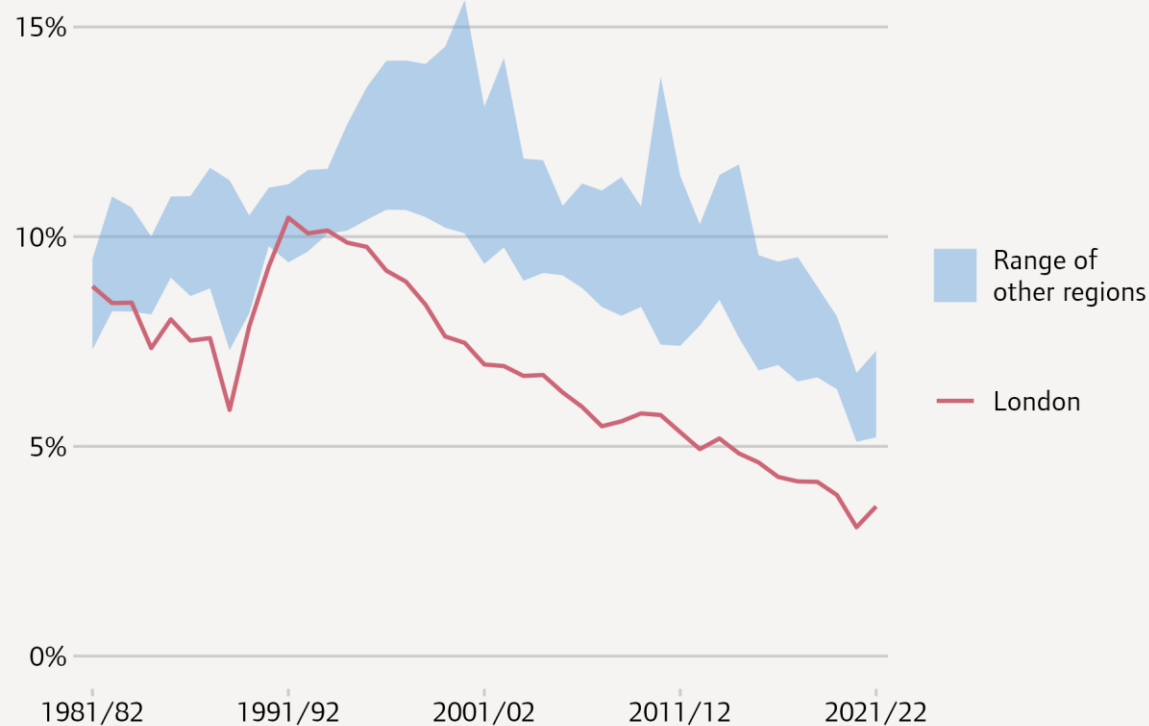


- In 2021/22, 13,589 households new to social housing moved into council or housing association homes in London, a figure that has fallen from 49,800 in 1996/97, but risen slightly from 11,620 in 2020/21. Lettings to new tenants have been in long-term decline in London but there was a particularly sharp fall in 2020/21, probably due to the pandemic.
- Properties let to new tenants in 2021/22 were equivalent to 1.7% of the total social housing stock in London (793,250 in 2022), a slight increase on last year but still one of the lowest turnover rates on record.
- 8,540 of the 2021/22 lettings were to new council tenants and 5,050 to housing association tenants. Council lettings have fallen sharply over time due to the shrinking of the council housing stock, but lettings from housing associations have not increased to offset this decline, with a growing stock failing to compensate for a falling letting rate.

Compiled by GLA from UK Housing Review, various years. Data is for tenants new to social housing and includes those moving from supported housing.

5.3 A comparison to other English regions shows that turnover in London’s council housing sector has fallen much more than anywhere else in recent decades

**Local authority lettings as a share of local authority housing stock by region, 1981/82 to 2021/22**

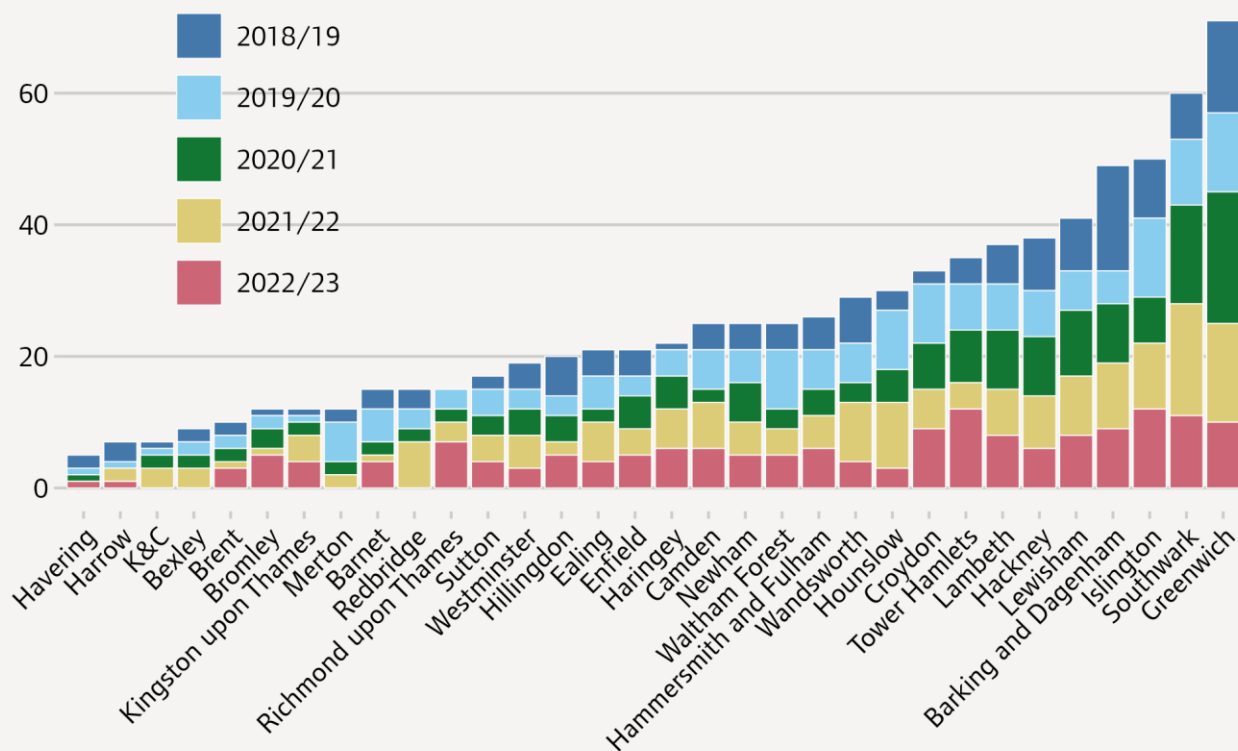


- At the start of the 1980s, the rate of turnover in London’s council housing sector (measured as the number of lettings as a share of the council dwelling stock) was in line with the average across all regions of England.
- But in a process that started in the 1980s, was interrupted during the property market crash of the late 80s/early 90s, and then restarted in earnest in the following decades, the rate of turnover in London fell steadily lower, more so than in any other region.
- By 2021/22 (the most recent year available), local authority lettings in London were equivalent to just 3.6% of the council housing stock, by far the lowest rate of any English region. The next lowest turnover rate was in the North East at 5.2%, while the highest rate was in the North West at 7.3%.

GLA analysis of DLUHC Local Authority Housing Statistics open data.

5.4 810 social rented homes in London have been freed up through the Seaside and Country Homes scheme in the past five years, with the highest figures in Greenwich and Southwark

**Social rented homes freed up through Seaside and Country Homes moves by borough, 2018/19 to 2022/23**

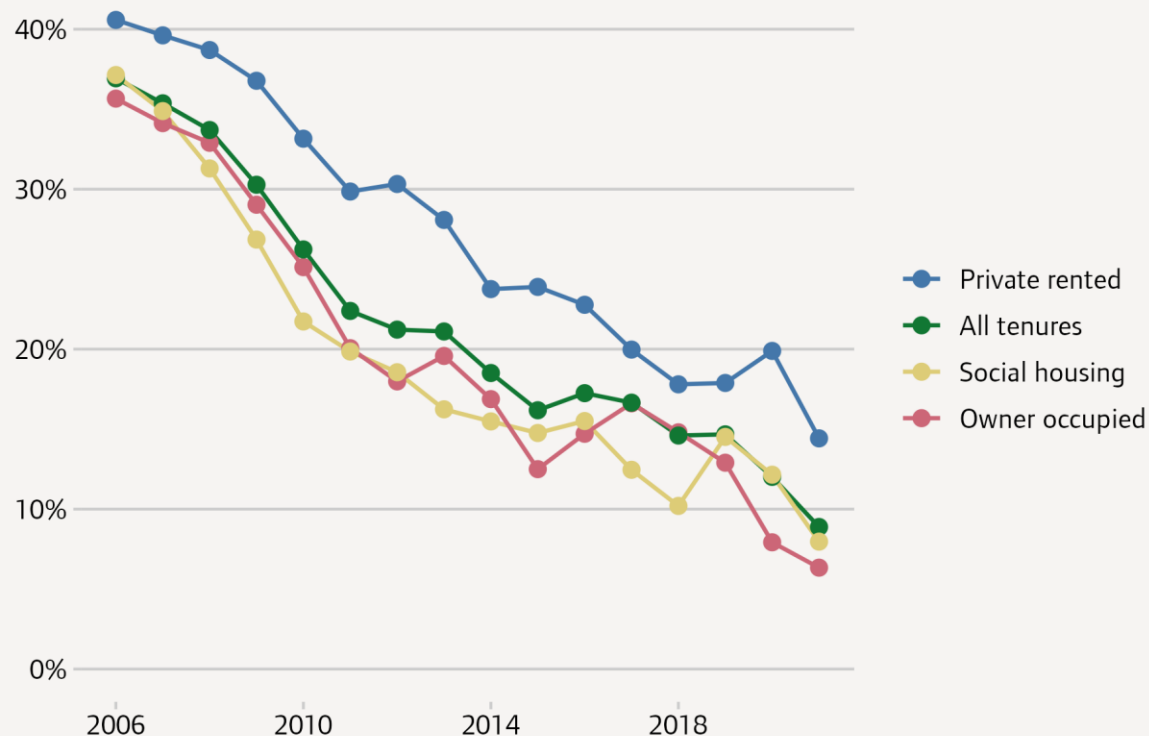


- The GLA has operated the Seaside and Country Homes scheme since 2011, which helps older council and housing association tenants in London move to a home outside London, therefore freeing up social rented homes.
- In the past five years of the scheme, 813 social rented homes have been freed up, with Greenwich freeing up the most homes through the scheme at 71. The City of London has not freed up any homes through the scheme in the past five years, and Havering is the next lowest borough with 5 homes freed up.
- This scheme allowed 166 households to move to a range of counties in 2022/23. Essex accommodated the highest number of movers this year, with 23 households relocating there. Kent, West Sussex and Hampshire were also popular locations for those moving out of London.

GLA Seaside & Country Homes programme monitoring data.

5.5 In 2021 an estimated 9% of homes in London fell below the official Decent Homes Standard, a figure that has fallen by around three quarters since 2006

**Trend in non-decent homes in London as a share of the total in each tenure, 2006 to 2021**

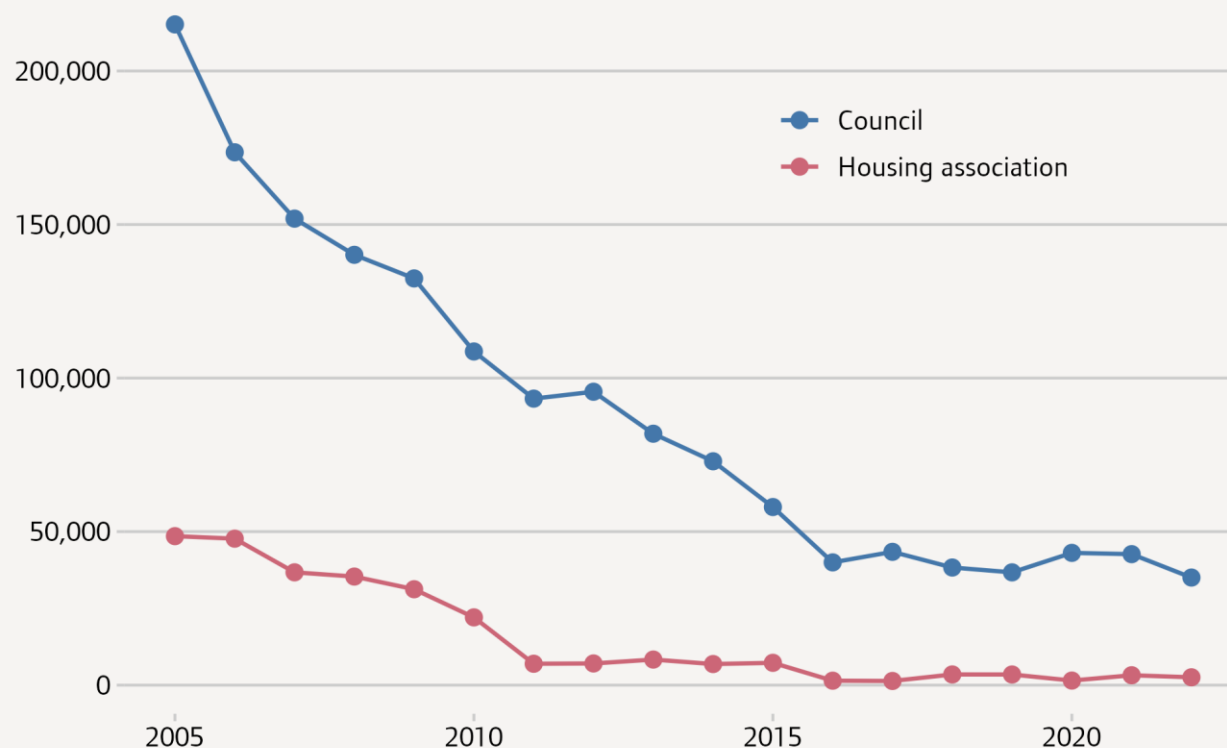


- Between 2006 and 2021, the proportion of homes in London estimated to be below the official Decent Homes Standard fell from 37% to 9%.
- The proportion of homes below the standard fell from 36% to 6% for owner occupied homes, from 37% to 8% for social rented homes and from 41% to 14% for privately rented homes.
- The higher proportion of homes below the standard in the private rented sector is likely to reflect in part the fact that there is a higher share of older homes in the sector.
- The sharp changes seen between 2019 and 2021 may also reflect the disruptive effects of the pandemic, which meant that English Housing Survey data for had to be based on modelled estimates rather than internal surveys of each property.

*DLUHC, English Housing Survey and English House Condition Survey. Data for 2020 and 2021 was modelled by DLUHC as surveyors were unable to carry out internal inspections of properties due to the Covid-19 pandemic.*

5.6 The number of affordable rented homes in London falling below the Decent Homes Standard reported by social housing landlords fell from 260,290 in 2005 to 37,590 in 2022

**Trend in number of non-decent affordable homes in London by landlord type, 2005 to 2022**

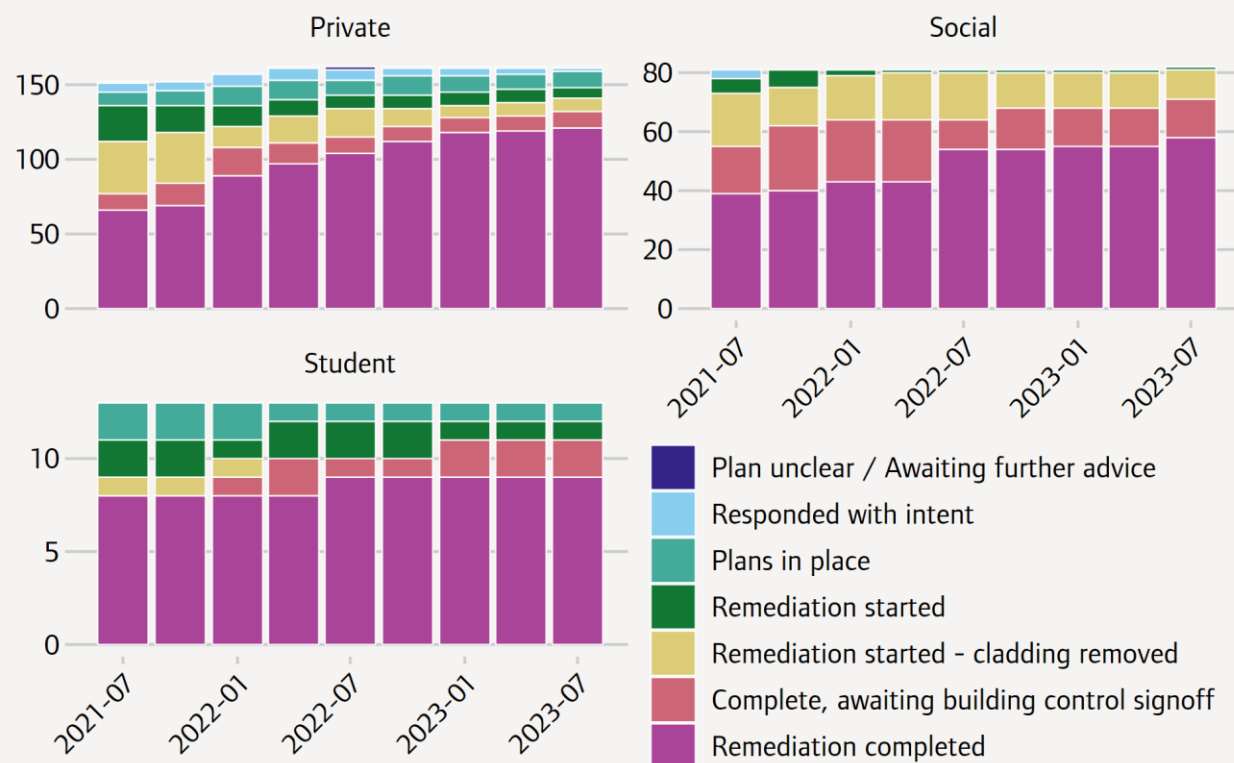


- Councils and housing associations reported that in April 2022 they owned a combined total of 37,590 rented homes in London that fell below the Decent Homes Standard. This figure is down slightly from 45,480 in 2021 but broadly in line with the level of the last several years. The figures recorded by councils and housing associations differ from those reported in the previous chart, which derive from surveys of random samples of properties across all tenures.
- Between 2005 and 2022, the number of non-decent housing association homes fell from 48,520 to 2,550. According to these figures, non-decent homes make up 0.6% of the total housing association stock in 2022.
- The number of non-decent council homes fell from 211,800 in 2005 to an all-time low of 35,040 in 2022, equivalent to 9% of the total number of council homes in London.

*Council data from DLUHC, Local authority housing statistics open data; Housing association data from Regulatory Statistical Return data published by the TSA, and from social housing stock statistics published by the Regulator of Social Housing.*

5.7 As of July 2023, cladding remediation works had been completed on 227 of the 273 high-rise housing blocks identified in London with aluminium composite material (ACM) cladding systems unlikely to meet building regulations

**Progress of remediation on high-rise residential buildings in London identified for removal of ACM cladding systems, July 2021 to July 2023**



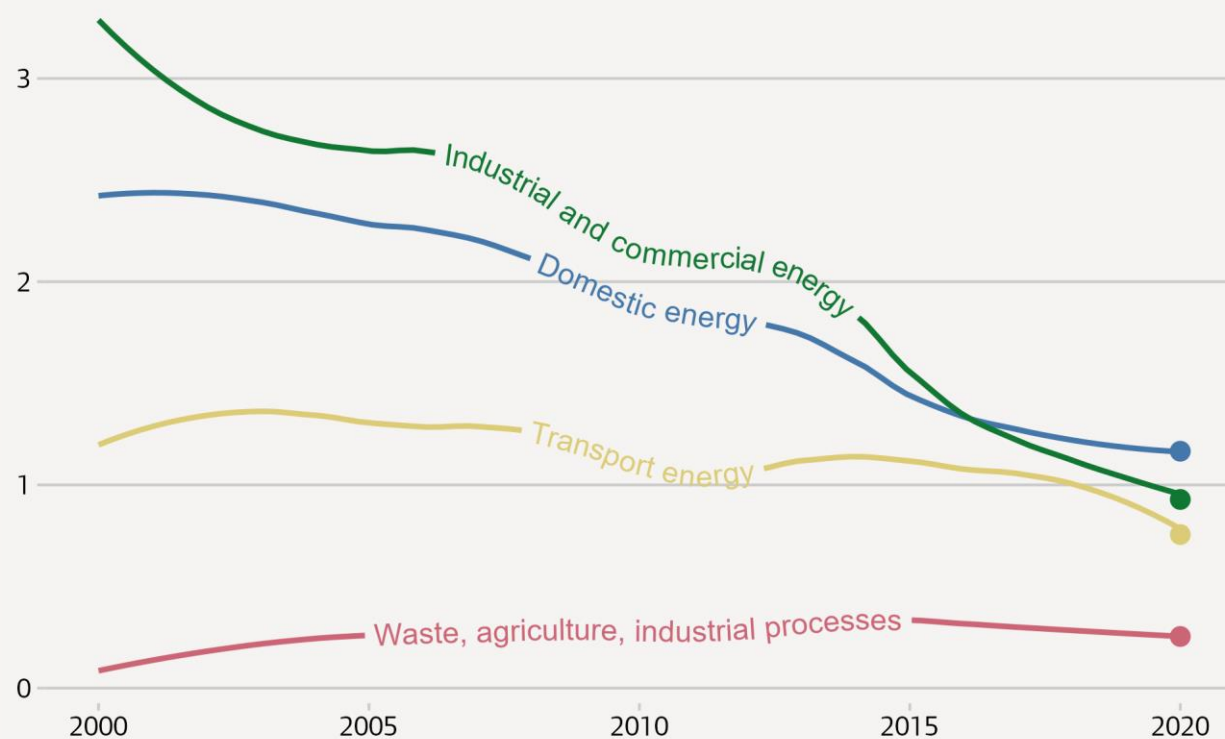
DLUHC, Building Safety Data Release July 2021 to July 2023.

- The GLA, on behalf of the government, has administered three funding programmes to remediate London buildings with unsafe cladding: the Social Sector and Private Sector ACM Cladding Remediation Funds and the Building Safety Fund for the remediation of unsafe non-ACM cladding systems.
- In July 2023, there were 273 high-rise residential buildings identified in London with ACM cladding systems unlikely to meet building regulations, up slightly from 272 in July 2022 and 262 in July 2021. 82 of the buildings identified for remediation in London were owned by social housing landlords, 162 were private housing blocks and another 13 were student blocks.
- Remediation works had been completed on 227 buildings (including 28 awaiting sign-off from Building Control), up from 202 in July 2022. Works had started on another 31 blocks, with plans for work in place for a further 12. The owners of two private blocks had ‘responded with intent’ to undertake work, while in one case the plan was unclear or further advice was being awaited.



5.8 Per capita greenhouse gas emissions from domestic energy use have fallen by 41% in the last decade, although the rate of decline has slowed recently

**Annual per capita greenhouse gas emissions in London (tonnes of equivalent carbon dioxide) by sector, 2000 to 2020**

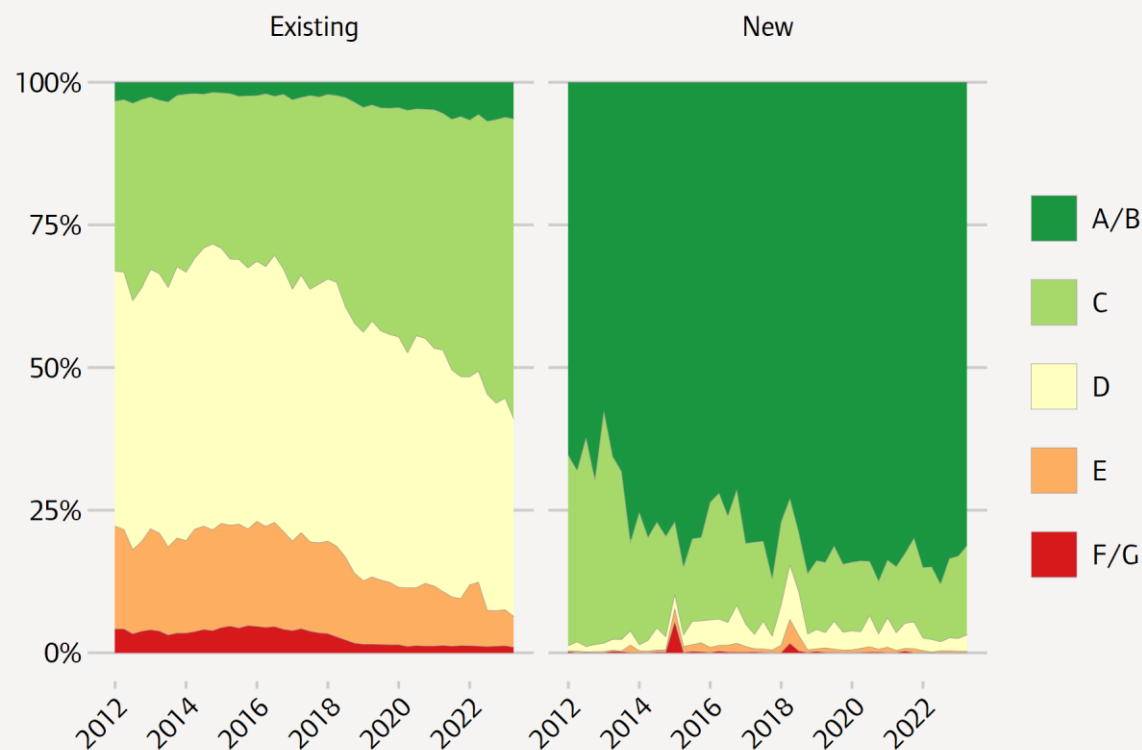


- The GLA's London Energy and Greenhouse Gas Inventory (LEGGI) measures greenhouse gas emissions from London's workplaces, homes and transport. Total greenhouse gas emissions have fallen by 45% in the last decade to 3.1 tonnes per Londoner in 2020.
- Per capita emissions of greenhouse gases from London's homes equalled 1.2 tonnes in 2020, 41% lower than a decade before but down only slightly in the last two years. Domestic energy is now firmly the largest source of per capita emissions in London.
- Per capita emissions from industrial and commercial energy use have fallen faster than domestic emissions and more than halved in a decade, from 2.3 tonnes in 2010 to 0.9 tonnes in 2020.
- Transport emissions per Londoner are lower than emissions from homes and workplaces, but were relatively flat until a sharp fall in 2020 to 0.8 tonnes, probably as a result of pandemic lockdowns.

GLA, London Energy and Greenhouse Gas Inventory (LEGGI). In a change from previously published figures, the 2019 LEGGI data includes estimates of emissions from bioenergy and waste sources not connected to the energy grid.

5.9 The energy efficiency of London’s existing housing stock has improved over time, but new build homes are still far more energy efficient on average

**Energy efficiency band of Energy Performance Certificates lodged for new and existing homes in London, 2012 Q1 to 2023 Q2**

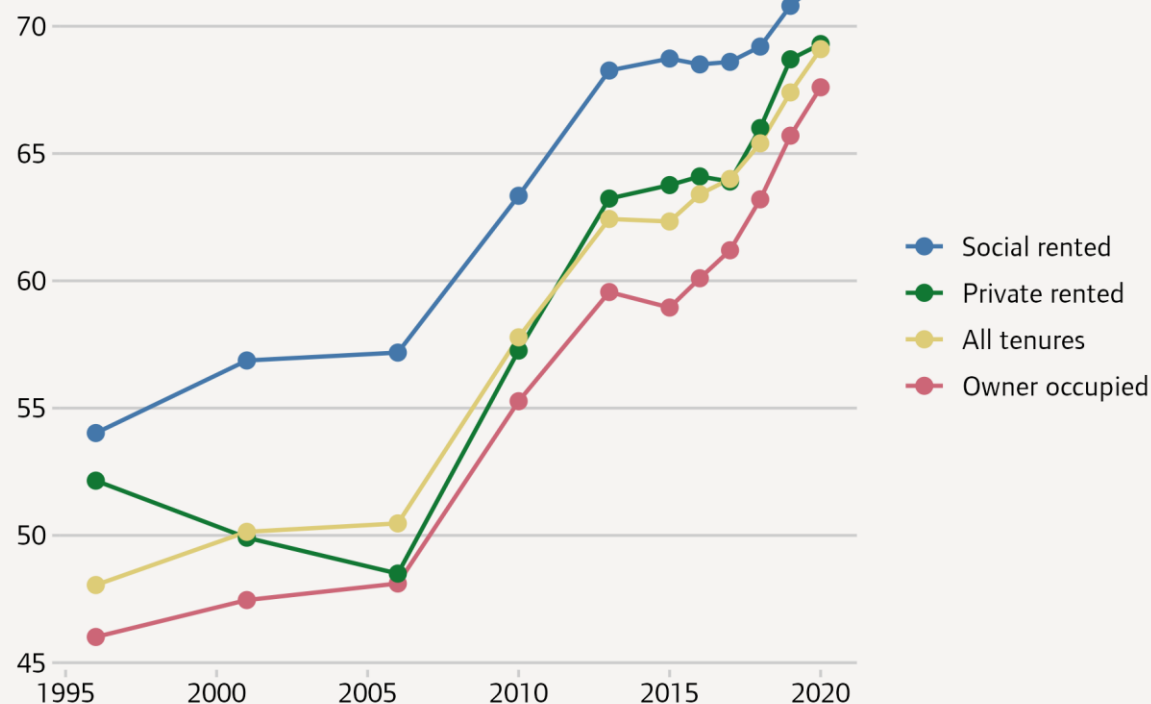


- Energy Performance Certificates (EPCs) are required when new homes are built or when existing homes are sold or relet. 6.4% of the existing homes with an EPC lodged in 2023 Q2 fell into the top A/B energy efficiency bands, almost double the 3.3% recorded in 2012. The number of C-rated homes recorded has also increased over this period, from 30% to 53%.
- In comparison, 81% of new build homes with EPCs lodged in 2023 Q2 had energy efficiency ratings of A or B, and another 16% were in band C. While the ratings of new homes have improved over time, most of this improvement came in the first half of the decade.
- There are still few homes in London in the top band, A. Over the last year there were just 546 A-rated EPCs recorded for new build homes in London, and only 77 for existing homes.

DLUHC, Live tables on Energy Performance of Buildings Certificates.

5.10 Progress in improving the energy efficiency of existing homes has picked up again after slowing in the mid-2010s

**Trend in median SAP (energy efficiency) rating by tenure, London 1996 to 2020**

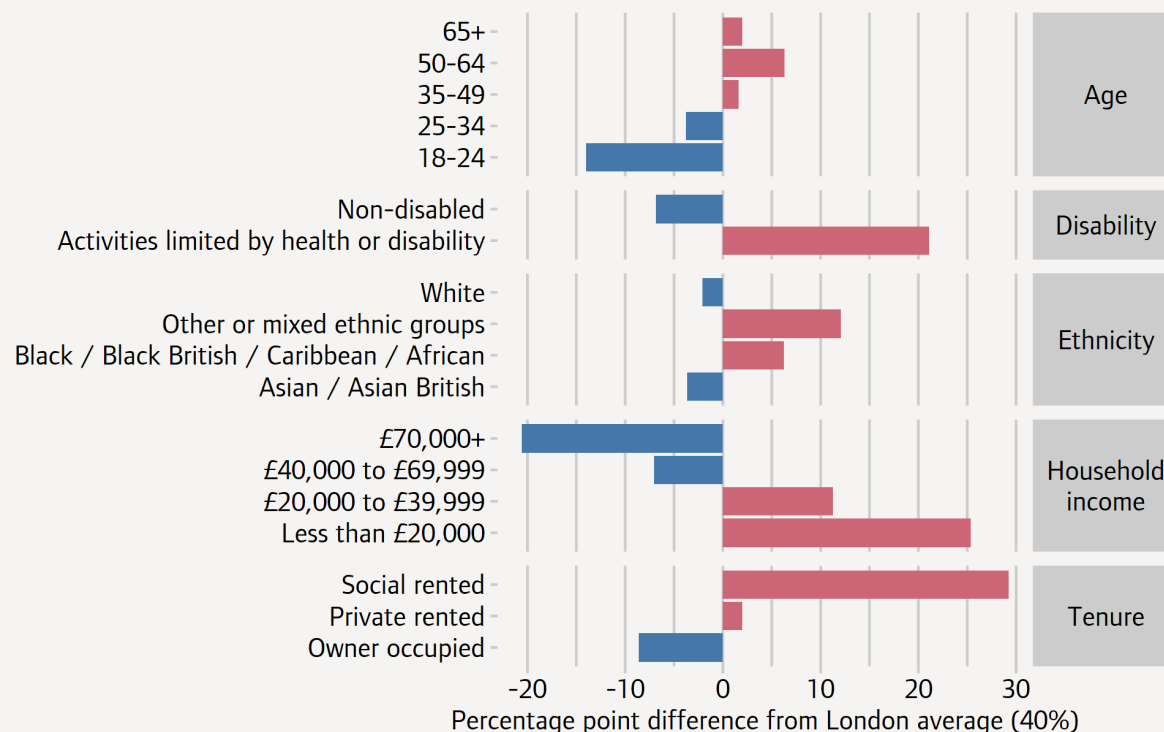


- The energy efficiency of housing can be measured by the Standard Assessment Procedure (SAP), which gives ratings in percentage terms (with 100% representing zero energy cost). This chart tracks these ratings since 1996 for all homes in London and for each of the three main tenures.
- The median rating for all homes in London was 69% in 2020, up from 48% in 1996 and 67% in 2019. The 2020 figure is likely to be less reliable than estimates from previous years because the pandemic prevented internal property inspections for the purposes of the English Housing Survey
- Social housing is the most energy efficient tenure, with a typical rating of 72% in 2020, but the ratings for the three main tenures have converged over time. Owner occupied and privately rented homes had median SAP ratings of 68% and 69% respectively in 2020.

GLA analysis of English House Condition Survey and English Housing Survey stock data 1996 to 2020. This analysis uses the 2012 SAP definition throughout and refers to all dwellings including vacant. Data for 2020 has been modelled by DLUHC as internal inspections of properties was not possible due to the Covid-19 pandemic.

5.11 In July 2023, 40% of adults in London said they will struggle to pay their energy bills in the next six months, with much higher figures reported by those on low incomes, living in social housing or living with a disability

**Differences from the London average in the proportion of adults who said they will struggle to pay their energy bills in the next six months (July 2023)**



- Since January 2022, the GLA has commissioned YouGov to undertake polling on the impact of the cost of living crisis on Londoners. In the latest data from July 2023, 40% of Londoners on average said they will struggle to pay their energy bills in the next six months.
- Financial difficulties are much more common among those living in social housing, 69% of whom said they would struggle to pay their energy bills. There were also higher rates among households with low incomes and among Londoners of a Black, mixed or 'other' ethnicity.
- Londoners whose activities are limited by health or a disability are 28 percentage points more likely to struggle to pay their energy bills over the next six months than those without disabilities. While young Londoners are less likely to struggle, older people between 50 and 64 (not yet reaching state pension age) are the most likely to struggle with their energy bills.

All figures, unless otherwise stated, are from YouGov Plc. See Appendix for details of methods, sample sizes and fieldwork dates. Responses from those who said they definitely will struggle or probably will struggle to meet payments have been combined, and respondents who said the question was not applicable have been excluded. 'Owner occupied' includes mortgaged owners, outright owners and shared owners. The figures for the Black, Asian and Other and Mixed ethnicity categories are based on samples of less than 100 and should be treated with additional caution.

## Appendix

### Details of YouGov surveys

This section provides details of fieldwork dates and sample sizes for the cost of living research carried out for the GLA by YouGov Plc. All surveys were carried out online. The figures were weighted to be representative of all London adults (aged 18+).

- January 2022: Fieldwork was carried out 21-26 January, total sample size was 1,188 adults
- April 2022: Fieldwork was carried out 14-19 April, total sample size was 1,123 adults
- July 2022: Fieldwork was carried out 15-20 July, total sample size was 1,245 adults
- October 2022: Fieldwork was carried out 21-27 October, total sample size was 1,162 adults
- January 2023: Fieldwork was carried out 20-24 January, total sample size was 1,167 adults
- April 2023: Fieldwork was carried out 28 April - 03 May, total sample size was 1,080 adults
- July 2023: Fieldwork was carried out 21-27 July, total sample size was 968 adults

### Definitions

ONS defines the **Household Reference Person (HRP)** as the household member who owns the accommodation; is legally responsible for the rent; or occupies the accommodation as reward of their employment, or through some relationship to its owner who is not a member of the household. If there are joint householders, the one with the highest income is the HRP. If their income is the same, then the eldest one is the HRP.

## **Acknowledgements**

This report draws heavily on official statistics and other data produced by various GLA teams, the Office for National Statistics and statisticians across central Government (particularly DLUHC), and their work is gratefully acknowledged.

We are also grateful to Molior, YouGov and Inside Airbnb for allowing us to use their data.

Much of the analysis and all of the visualisation in this report was carried out using the R programming environment and a range of packages including ggplot2, ggrepel, ggthemes, ggtextpath, readxl, surveytoolbox, tidyverse, and viridis. We are grateful to all of those who authored or contributed to these packages.