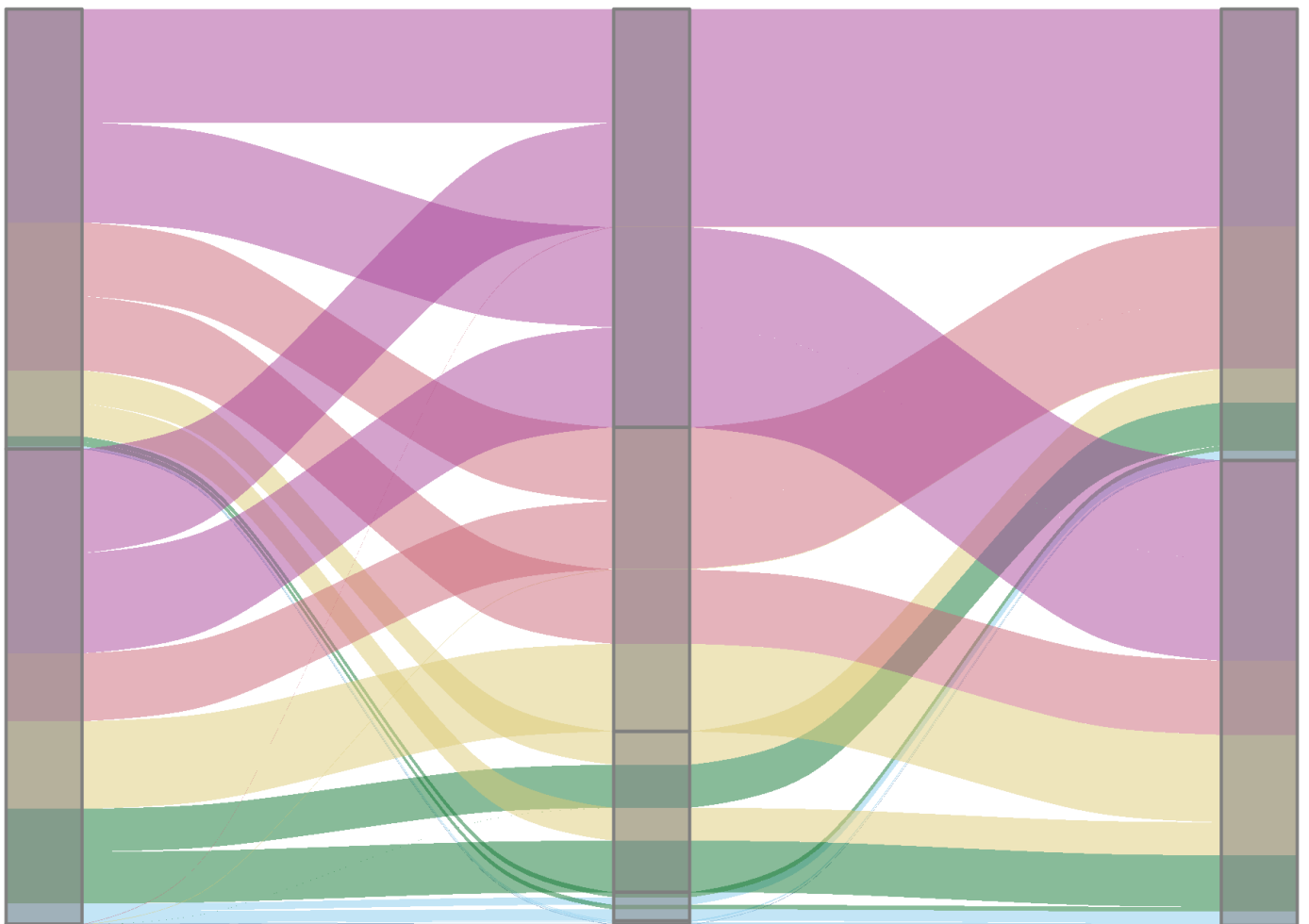


Housing Research Note 7

Who moves into social housing in London?



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Feedback on this report or suggestions for improvements are welcomed and should be sent to housing.analysis@london.gov.uk

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1. Introduction

- 1.1 This report sets out an analysis of data on social housing lettings in London, in order to understand more about the characteristics of people who move into social housing in London. The analysis first focuses on lettings into social housing in 2019/20 (the latest year for which detailed data was available at the time of writing), whether social rent or Affordable Rent and whether 'general needs' (mainstream social housing) or supported housing. It next considers changes in lettings to general needs homes over time by comparing the period 2012/13 to 2019/20.
- 1.2 The main focus of the analysis is on the flow of moves into social housing from other tenures (including temporary accommodation for homeless households). The analysis does not cover moves that may be needed or desired but are not realised (primarily due to a lack of suitable supply), although section 8 does examine the fall in the annual number of lettings in London over time. Other research, including the [2017 London Strategic Housing Market Assessment](#) and [Crisis's Homelessness Monitor](#), provide detailed analysis of existing housing need.
- 1.3 The analysis also does not examine the knock-on effects on other tenures of households moving into social housing, including changes to the demographic composition of those tenures or any further moves made possible by these initial lettings.

2. Summary

- In 2019/20 there were 24,437 general needs lettings and 9,651 supported housing lettings in London. General needs lettings were split fairly evenly between council and housing association landlords, while housing associations (sometimes called "private registered providers") accounted for most of the supported housing lettings.
- There are significant differences in the characteristics of people who move into general needs housing compared to those moving into supported housing in London, particularly in terms of age and household type. For example, households moving into general needs housing are far more likely to have children than the general population.
- Around half of those moving into social housing were previously homeless, with the remainder coming from a wide variety of circumstances, including overcrowding.
- Those moving into general needs social housing are on average younger than the wider London population, while those moving into supported housing are more likely to be at or above retirement age.
- Lone-parent families and female-headed households comprise a much larger share of those moving into social housing than they do of the wider London population.
- There is a larger share of households headed by someone from a Black, Asian or other minority ethnic background among those moving into social housing than among the wider population, reflecting higher rates of homelessness, overcrowding and other forms of housing need.

3. Data

- 3.1 The data used in this report comes from the CORE (for Continuous Recording of lettings and sales) system used by affordable housing providers to record details of households moving into their stock, of the housing costs they incur and of the homes themselves. CORE is managed by the Ministry for Housing, Communities and Local Government, and has been used in different guises since the 1990s.

- 3.2 Use of CORE is compulsory for providers who are registered with the Regulator of Social Housing. Local authorities have been participating on a voluntary basis since 2004/05 - in that year only 24% of stock-holding local authorities participated, but coverage grew steadily and by 2013/14 all local authorities were submitting some data. Weighting is used to adjust the social rent dataset for incomplete responses, and imputation is used to adjust for non-response by tenants to some questions.
- 3.3 CORE lettings data has some limitations - it does not collect data on ongoing tenancies, and covers only 'new lettings' to social housing, not including mutual exchanges but including other transfers. It also does not collect information about some important dimensions of (in)equality, such as religious beliefs (if any), sexuality or gender reassignment.
- 3.4 Data is also collected through CORE on sales of affordable housing, primarily as shared ownership. This data was separately analysed by the GLA and is not covered in this report (see '[Intermediate housing: The evidence base](#)').
- 3.5 The Department for Levelling Up, Housing and Communities (DLUHC) publishes an annual [analysis](#) of CORE lettings data, including a new dashboard providing detailed results at local authority level.

Acknowledgements

- 3.6 The data used to produce this report was provided to the GLA by DLUHC under the terms of a memorandum of understanding. CORE data is also available to registered users of the [UK Data Service](#).

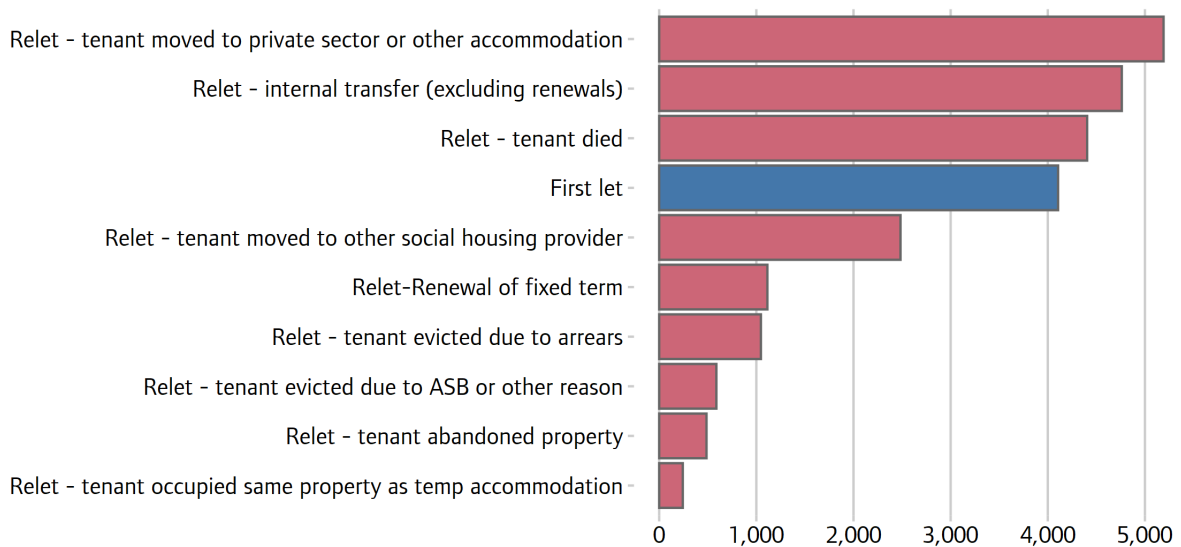
4. Overview

- 4.1 'General needs' refers to mainstream social housing that is not designated for any specific client group. Supported housing refers to housing where support and/or care services are provided to help people to live as independently as possible. In 2019/20 there were 24,437 general needs lettings and 9,651 supported housing lettings in London, for a total of 34,088.
- 4.2 13,225 of these lettings were by councils and 20,864 by housing associations. Most of the supported housing lettings were by housing associations.
- 4.3 We can get a sense of the rate of new lettings by comparing lettings by housing associations to the stock they hold (according to figures published by the Regulator of Social Housing). In 2020 housing associations owned a total of 26,130 supported homes in London. The 8,464 new lettings to housing association-owned supported housing dwellings were therefore equivalent to a 'letting rate' of 32.4%.
- 4.4 In contrast, the 12,400 new lettings to housing association owned general needs homes represent a letting rate of just 3.4% when compared to the stock of 362,202 homes in 2020. The far higher turnover in supported housing reflects in part the temporary nature of some supported housing services, particularly those aimed at younger people.
- 4.5 Councils in London owned 14,060 supported housing and 375,062 general needs homes in London in 2020. When compared to the number of lettings this gives a letting rate of 8.4% in supported housing and 3.2% in general needs housing. The much lower rate of turnover in council-owned supported housing stock is probably due to a different client mix - the average age of those moving into council-owned supported housing is 65, compared to 34 for supported housing owned by housing associations.



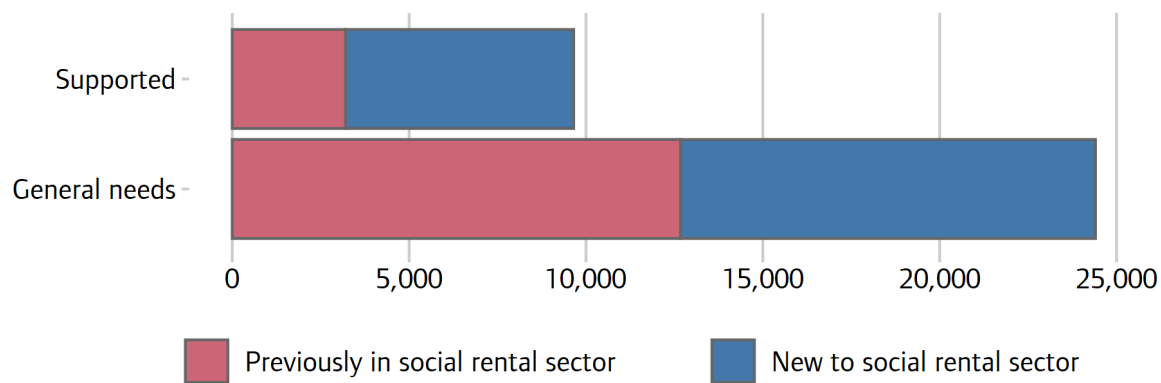
Lettings by housing type and landlord, London 2019/20

- 4.6 We can also distinguish between lettings to social rent, of which there were 29,124 in 2019/20, and to Affordable Rent, of which there were 4,965. In general these are targeted at the same groups so this report does not seek to distinguish them. However, one notable difference is that most Affordable Rent homes are let by housing associations as they built the vast majority of new homes under the 2011-15 Affordable Homes Programme, during which Affordable Rent was first promoted by central government.
- 4.7 Only 4,106 general needs lettings in 2019/20 were a first let, meaning the first time a newly built or acquired dwelling was occupied. These lettings can be identified by examining the reason given for a property becoming vacant. This data is only collected for general needs lettings.



Reason for vacancy by housing type (general needs lettings only), 2019/20

- 4.8 Finally, we can distinguish between tenants that are new to social housing and those who moved from an existing social housing tenancy. 11,731 of the general needs lettings (48% of the total) and 6,451 of the supported housing lettings (66.8%) were to tenants new to social housing.



Lettings to new or existing tenants by housing type, 2019/20

4.9 The following sections focus on tenants new to social housing, while section 7 analyses the characteristics of the homes that households move into and section 8 concludes with an analysis of long-term trends.

5. Housing need

5.1 For each letting the tenant gives their view on the reason they left their last settled home. The table below gives the full list of reasons, split between general needs and supported housing and sorted by the total amount. The reasons given are as recorded in the CORE system.

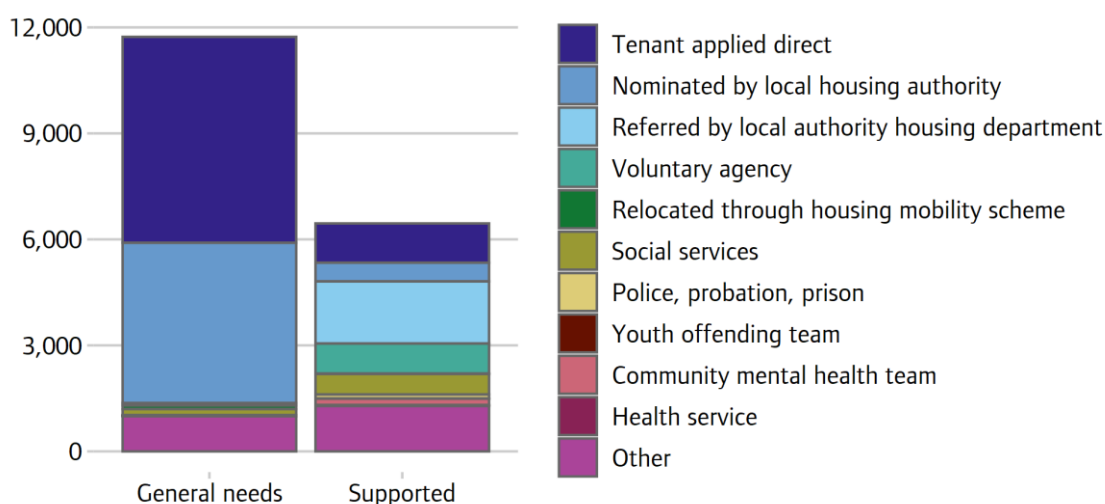
5.2 Some of these reasons require additional explanation. End of tenancy on a “no fault basis” means that the household’s previous Assured Shorthold tenancy or fixed-term tenancy has come to the end of its allocated term. In some cases the fixed-term tenancy will have been renewed, which is still counted as a new letting. End of tenancy with “tenant at fault” means that the tenancy has come to an end due to the tenant being evicted from their accommodation. And “To move to independent accommodation” is something of a catch-all term and generally comprises households coming from temporary accommodation or who were living with family and friends.

Reason for leaving last settled home	General needs	Supported	Total
Asked to leave by family or friends	1,477	933	2,410
To move to independent accommodation	1,627	177	1,804
Property unsuitable because of overcrowding	1,497	94	1,591
To move to accommodation with support	103	1,136	1,239
Domestic abuse	242	641	883
Property unsuitable because of ill health/disability	382	179	561
End of Assured shorthold tenancy ‘no fault’	501	51	552
(Non-violent) relationship breakdown with partner	226	168	394
Discharged from prison/longstay hospital/other institution	56	304	360
Left home country as refugee	208	109	317
End of Fixed Term tenancy ‘no fault’	211	36	247
Property unsuitable because of poor condition	120	41	161
Loss of tied accommodation	98	42	140
End of Assured shorthold tenancy ‘eviction/tenant at fault’	114	17	131
Repossession	85	33	118
Couldn’t afford rent or mortgage-other	70	34	104
To move nearer to family/friends/school	57	41	98

Reason for leaving last settled home	General needs	Supported	Total
Couldn't afford the increase in rent	53	15	68
Other problems with neighbours	39	18	57
Couldn't afford rent or mortgage-employment	33	8	41
End of Fixed Term tenancy 'eviction/tenant at fault'	20	18	38
To move nearer work	27	8	35
Under occupation – no incentive	33	2	35
Under occupation – offered incentive to downsize	24	2	26
Couldn't afford rent or mortgage -welfare reforms	15	9	24
Permanently decanted from another property owned by this landlord	17	5	22
Death of household member in last settled accommodation	12	4	16
Hate crime	7	5	12
Racial harassment	4	5	9
Couldn't afford fees attached to renewing the tenancy	4	4	8

Reason for leaving last settled home by housing type

5.3 Social housing lettings are governed by an extensive legal framework, with local authorities primarily responsible for ensuring that tenants are allocated to homes according to established rules, and with an emphasis on prioritising the most needy cases. Within this framework, tenants can be referred to their new landlord through a number of routes. As the chart below shows, the vast majority of tenants moving into general needs homes either applied directly (which applies to most of those moving into council homes) or were nominated by the local authority (which applies to those moving into housing association homes). Routes into supported housing were much more diverse, with significant numbers of new tenants being referred by voluntary agencies, social services, or police, probation or prison services.



Source of referral by housing type

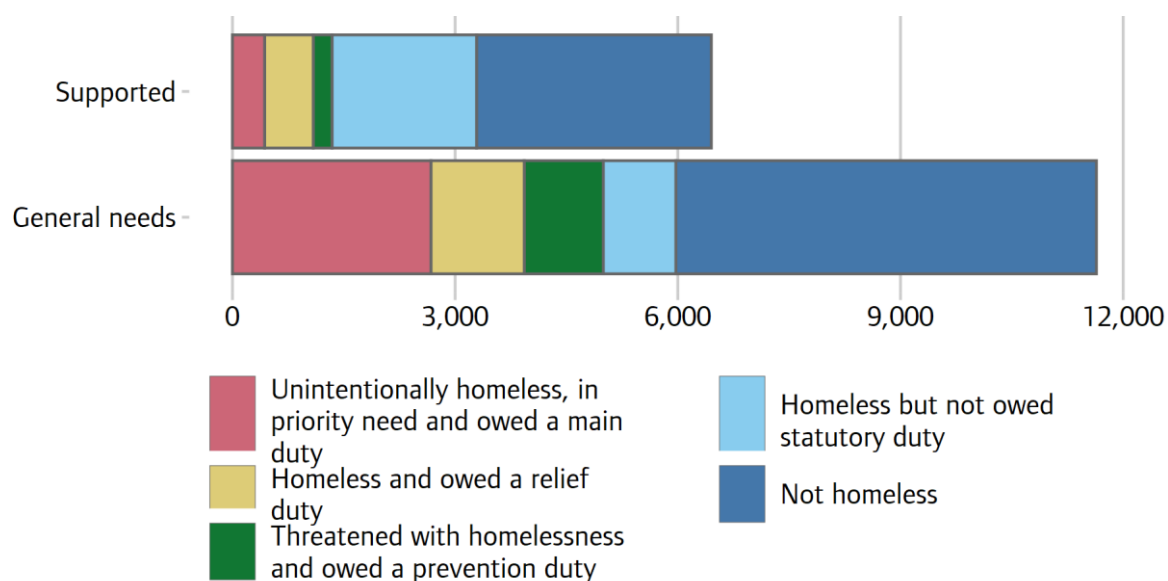
5.4 CORE records the previous housing situation of those moving into social housing. The largest share of those moving into general needs housing were previously living in Bed and Breakfasts or some other form of temporary accommodation. Moves into supported housing were most often from private rented housing or from living with friends or family.

Previous accommodation	General needs	Supported	Total
Any other temporary accommodation	4,440	574	5,014

Previous accommodation	General needs	Supported	Total
Other	2,320	1,804	4,124
Living with friends or family	2,491	1,544	4,035
Private sector tenancy	1,466	995	2,461
Bed & breakfast	300	228	528
Rough sleeping	58	408	466
Direct access hostel	209	98	307
Childrens home/foster care	150	121	271
Hospital	12	256	268
Refuge	124	48	172
Prison or Approved Probation Hostel	18	150	168
Owner occupation (private)	78	80	158
Residential care home	13	62	75
Home Office Asylum Support	14	51	65
Tied housing or renting with job	20	25	45
Mobile home/caravan	15	8	23
Owner occupation (low cost home ownership)	7	0	7

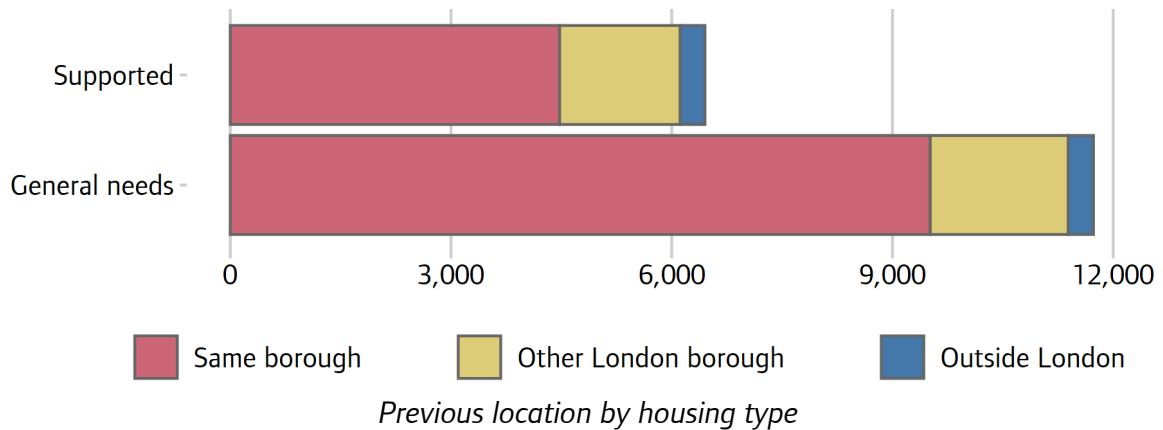
Previous accommodation by housing type

5.5 We can also tell whether households were homeless immediately prior to the letting. Just over half of those moving to general needs housing were homeless, of whom the vast majority were owed a statutory duty.



Homelessness status by housing type

5.6 CORE also records the previous location of tenants moving into social housing, so we can tell if the tenants moved from within the same borough, from elsewhere in London or from outside London. The vast majority of moves are within the same borough, with only a tiny proportion coming from outside London.

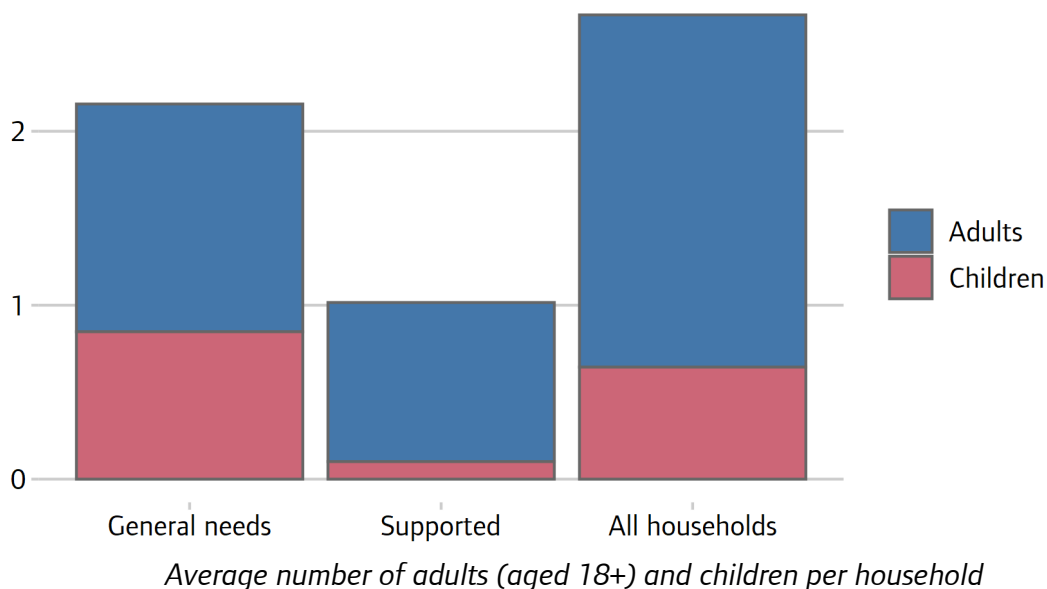


6. Demographics

6.1 This section focuses on lettings to households new to social housing, distinguishing between general needs and supported housing and where possible comparing to estimates for all households in London from the Labour Force Survey, a large quarterly survey of the general population.

Household size

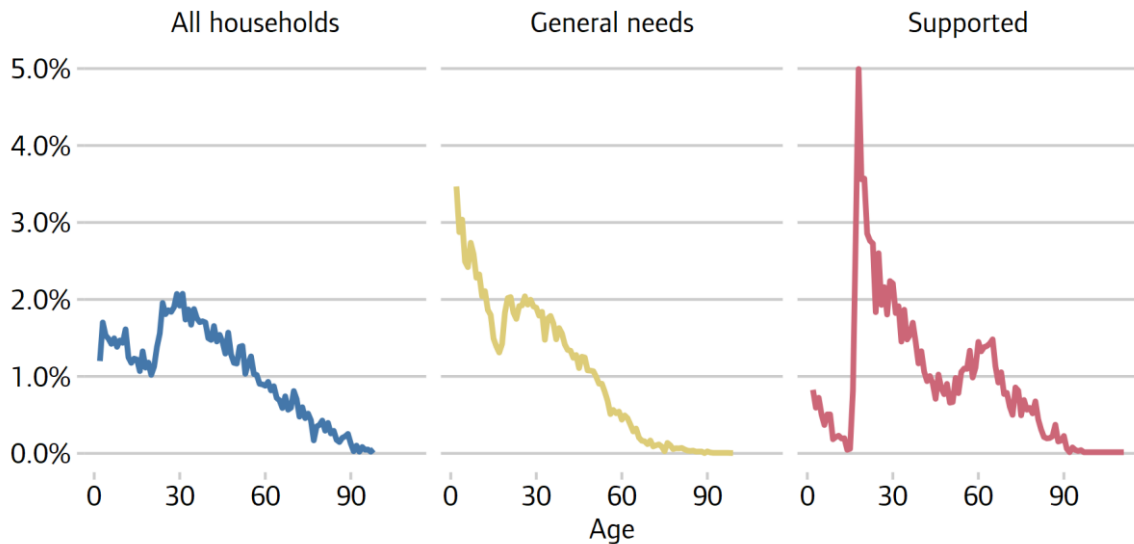
6.2 The average number of people in each household moving into social housing in London in 2019/20 was 2.22 for general needs and 1.1 for supported housing, compared to 2.67 for all households in London. Most of the difference between the two social housing tenures is due to the almost complete absence of children (defined as anyone aged under 18) in supported housing lettings (though note that because data on ages is missing for some households in the CORE dataset, the sum of the numbers of adults and children can be less than the reported household size).



Age distribution

6.3 The age distributions of people moving into social and supported housing are very different. Households moving into general needs housing are far more likely to have children than the general population, while those moving into supported housing are far less likely. Young adults and older people stand out as the largest groups moving into

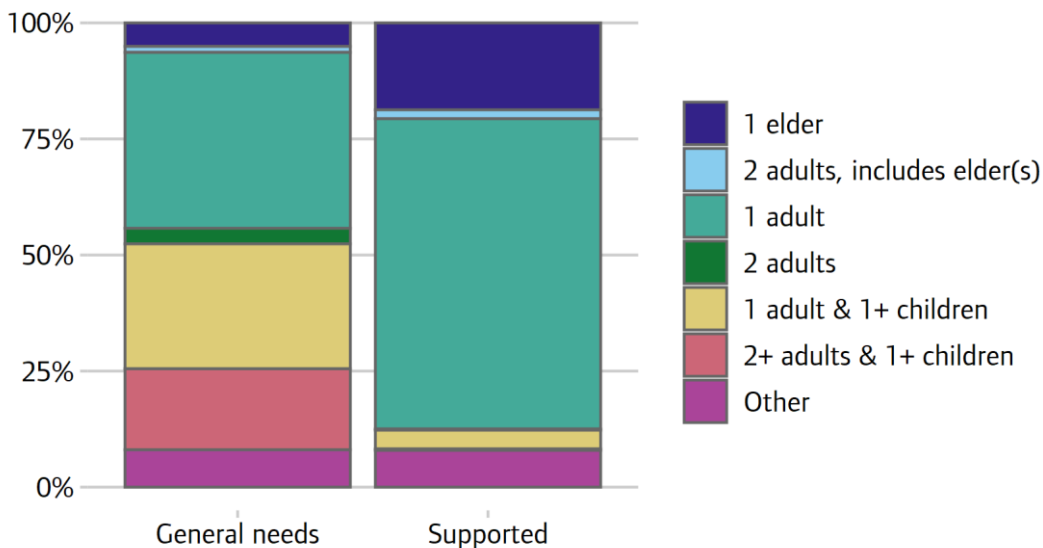
supported housing, while relatively few older people move into general needs housing when compared to either the general population or those moving into supported housing. It should however be noted that the proportion of older people already living in social housing, as opposed to the inflow of new tenants, is considerably higher.



Age distribution of individuals moving into general needs and supported housing, and of people in all London households

Household type

6.4 The vast majority of households moving into supported housing are made up of single adults only. Of those moving into general needs social housing, 70% are either single-person or single-parent households.



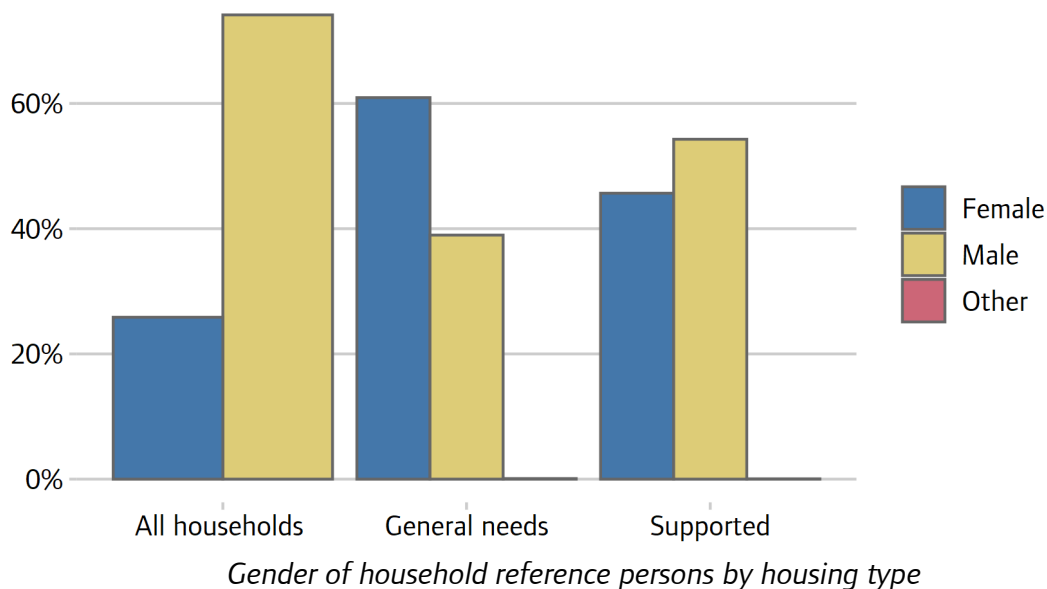
Household type by housing type and whether tenant is new to social housing

6.5 A full comparison with all households in London is not possible as the Labour Force Survey does not use the same type categories as CORE, but we can say that single-person households account for 25% of all households in London, less than their share of both general needs and (in particular) supported housing lettings. Similarly, single-parent

households account for around 13% of households in London, which is around half their share of those moving into general needs social housing.

Gender of household reference persons

- 6.6 The CORE system collects information on the self-defined gender of household members, including the 'household reference person' (generally defined as the member of the household responsible for housing costs, or if there are more than one in this category, the oldest). 61% of households moving into general needs social housing in London in 2019/20 had a female household reference person, compared to 46% of those moving into supported housing and just 26% of all households in London. The high proportion of households moving into social housing who are headed by a woman is partly a consequence of the high number of single-parent households and low number of couple households moving. A small proportion (less than 0.1%) of households moving into social housing were headed by someone who defined their gender as other than male or female.

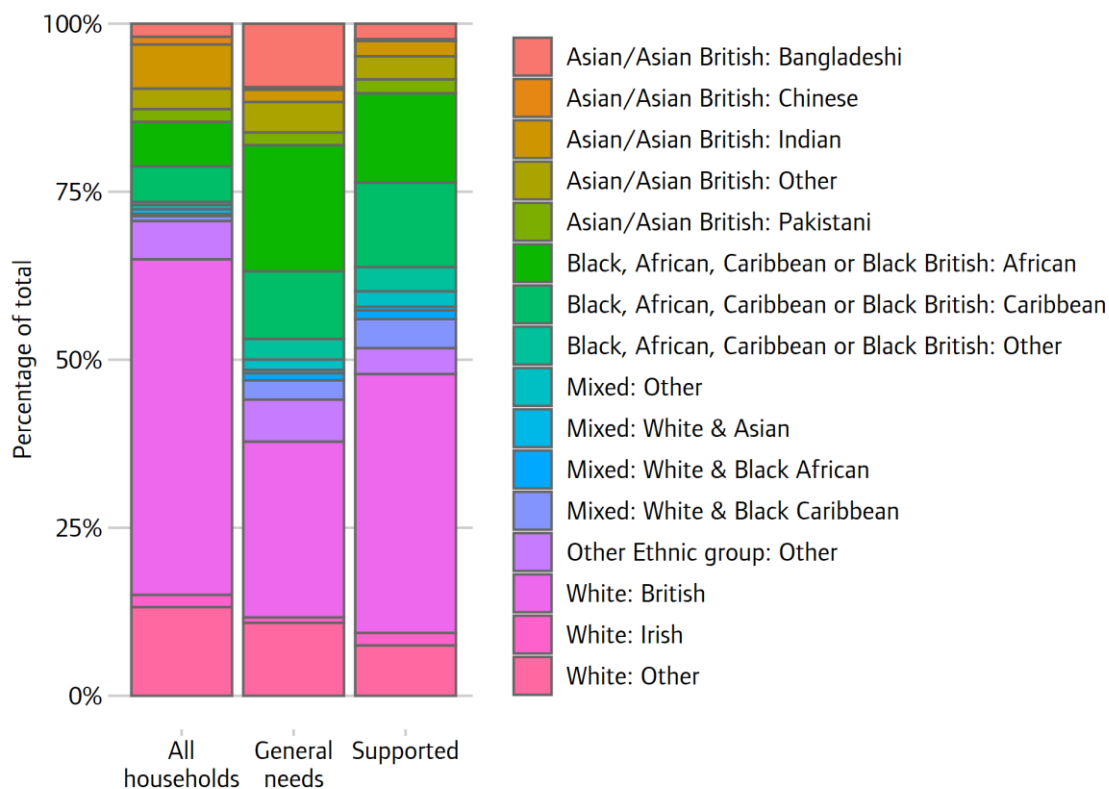


Pregnancy and newborn children

- 6.7 Meanwhile, 2% of the households moving into social housing included a pregnant woman, compared to 1% of households moving into supported housing. The Labour Force Survey does not report the proportion of all households in London that include a pregnant woman, but it does say that 3% of households have one or more children aged under 12 months.

Ethnicity

- 6.8 The chart below compares lettings to general needs and supported housing with all households in London according to the ethnicity category of the household reference person. The "White other" category includes a very small number of Gypsy or Irish Traveller households, and "Other ethnic group" includes a small number of Arab households. While detailed, this categorisation still glosses over some complexities: for example, many households contain people from different ethnicities, and some of the categories also cover people from a very wide range of backgrounds.



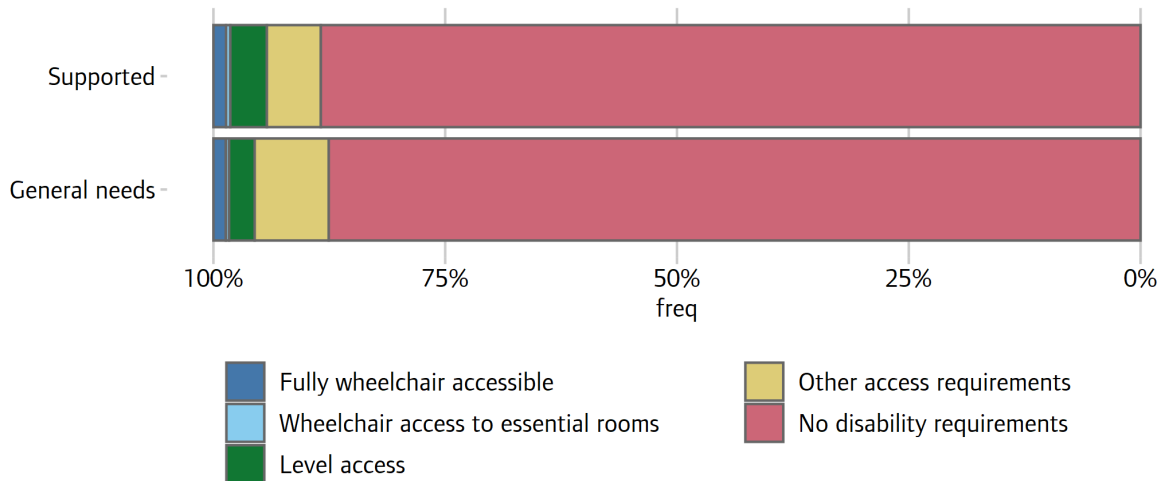
6.9 74% of households moving into general needs housing and 61% moving into supported housing in London in 2019/20 were headed by someone of Black, Asian or other minority ethnicity, compared to 50% of households in the general population. Because social housing is allocated on the basis of need, these differences reflect the wide disparities in experiences of homelessness, overcrowding and other forms of housing need between Londoners from different ethnic backgrounds - for example, Black Londoners are around three times as likely as White Londoners to live in overcrowded households, and about four times as likely to be assessed as homeless (GLA, Housing in London 2020).

7. Property characteristics

7.1 CORE records a number of the key physical characteristics of the homes that new tenants move into, which this section briefly analyses.

Wheelchair accessible homes

7.2 Households moving into social housing are asked if they have any specific needs relating to accessibility. 1.3% of households moving into social housing needed fully wheelchair accessible homes, 0.4% needed wheelchair access to essential rooms, 3.2% needed level access, and 7.3% had other (unspecified) disability requirements. Most households had no disability-related requirements, and the proportions were similar across general needs and supported housing. The same breakdown is not available for the population as a whole, but according to the English Housing Survey around 3.5% of all households in England included at least one wheelchair user in 2017/18.

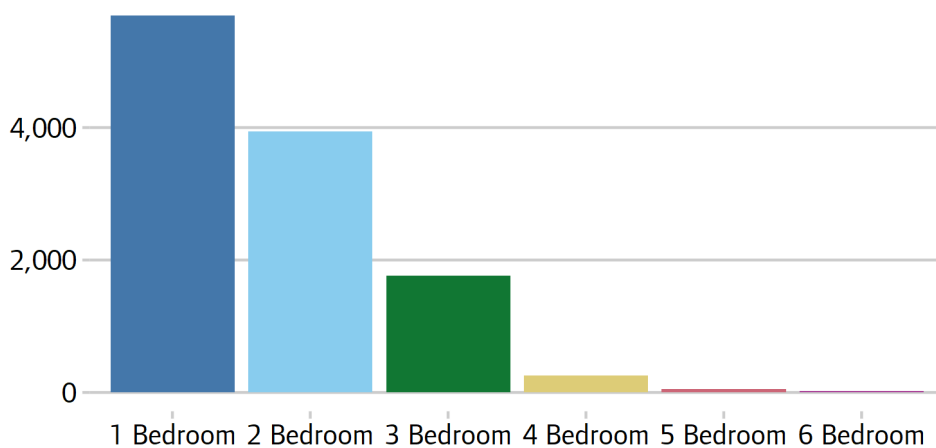


Accessible housing needs by housing type

7.3 General needs homes are categorised by whether they are built or adapted to wheelchair user standards. This means that the home is suitable for someone who uses a wheelchair and offers full use of all its rooms and facilities. In 2019/20, 758 of the general needs homes let out to tenants new to social housing in London were considered wheelchair accessible, 6% of the total.

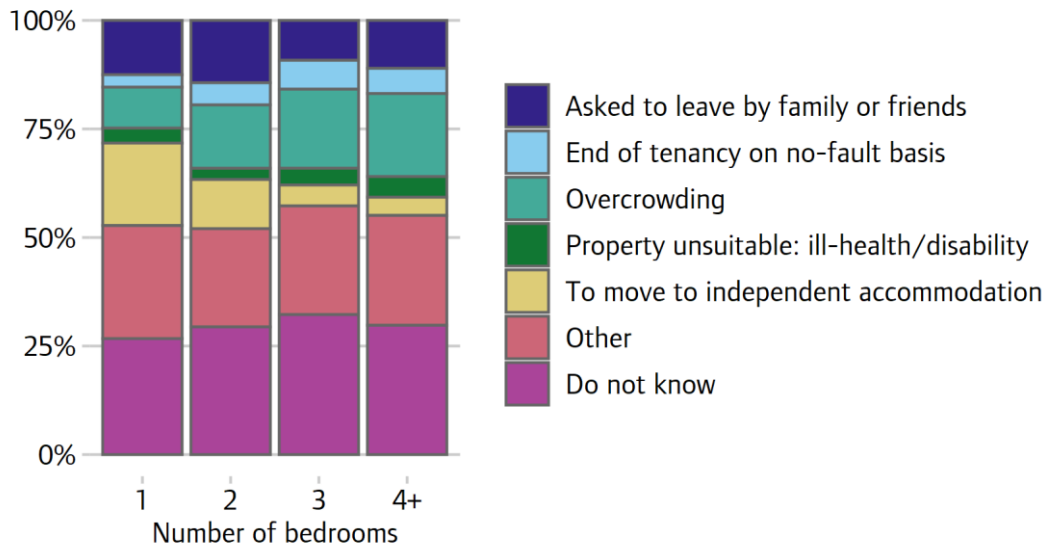
Bedrooms

7.4 The number of bedrooms in the household’s new home is reported for households moving into general needs housing only. In 2019/20, 49% of these households moved into one-bedroom homes and 34% into two-bedrooms homes. By comparison, one-bedroom homes comprised 35% and two-bedroom homes 36% of London’s social housing stock in 2011 (according to the most recent Census data), indicating that larger social housing homes become available for letting at a slower rate than smaller ones.



General needs lettings by number of bedrooms

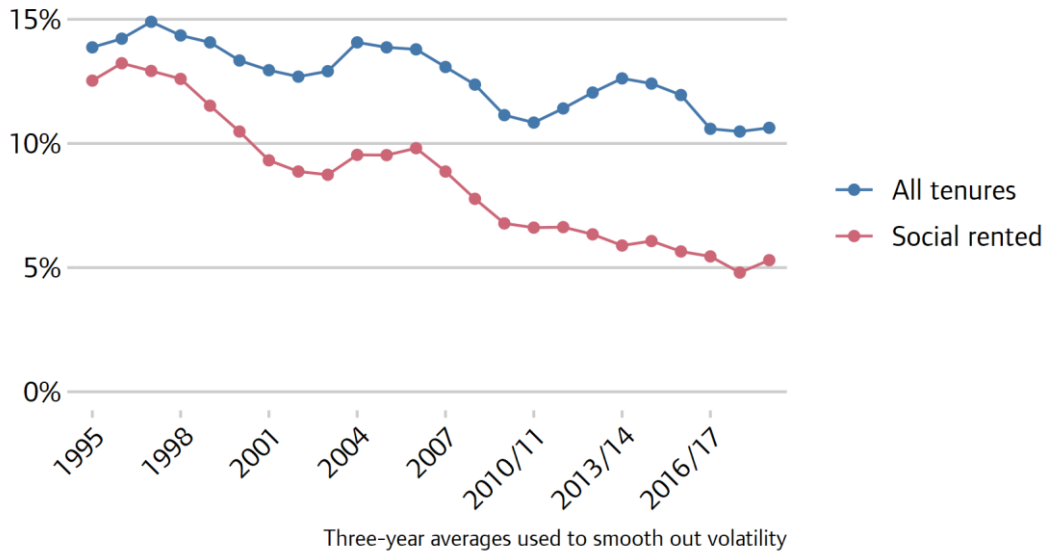
7.5 We can also compare the reasons tenants gave for moving by the number of bedrooms in the homes they moved to. The main differences are that people are more likely to have moved into one- or two-bedroom homes because they wanted independent accommodation or were asked to leave their previous home by family or friends, and more likely to have moved into family-sized homes because they were overcrowded in their previous accommodation.



Reason for leaving last home by number of bedrooms in new home

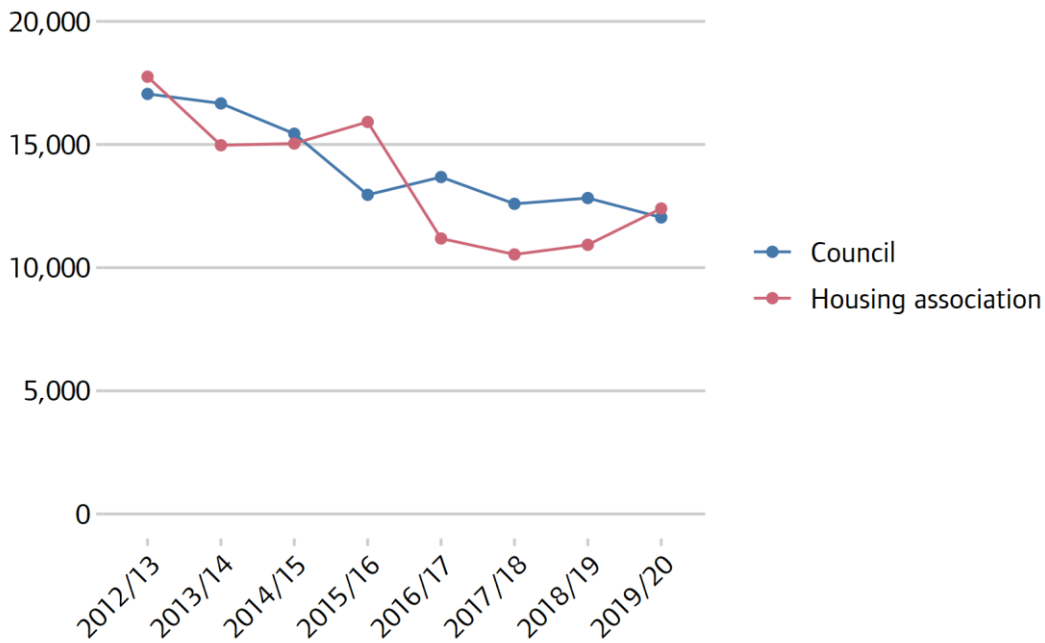
8. Comparisons over time

- 8.1 To see how some of these patterns have changed over time, we can compare lettings of general needs housing to new tenants in 2019/20 with the period since 2012/13.
- 8.2 A longer analysis is hampered by the fact that the weighting to adjust local authority records for under-reporting was not introduced until 2012/13, so the figures for local authority lettings in previous years would appear artificially low and may be less representative.
- 8.3 However, some context can be provided by reference to another data source, the English Housing Survey (and its predecessor, the Survey of English Housing). As a sample survey rather than an administrative record, these surveys produce results that are inevitably less precise and less detailed than those from CORE, but they do provide a useful illustration of overall trends. The chart below combines data from these two surveys, and shows the proportion of households in social housing and across tenures who have lived in their current home for less than a year. According to this measure, mobility in social housing has fallen sharply, from 13% of households having moved in the last year in 1995 to just 5% in 2018/19 (other tenures have also seen a decline in mobility over this period, but not so steep).



Households who have lived at their current home for less than a year, London 1995 to 2018/19

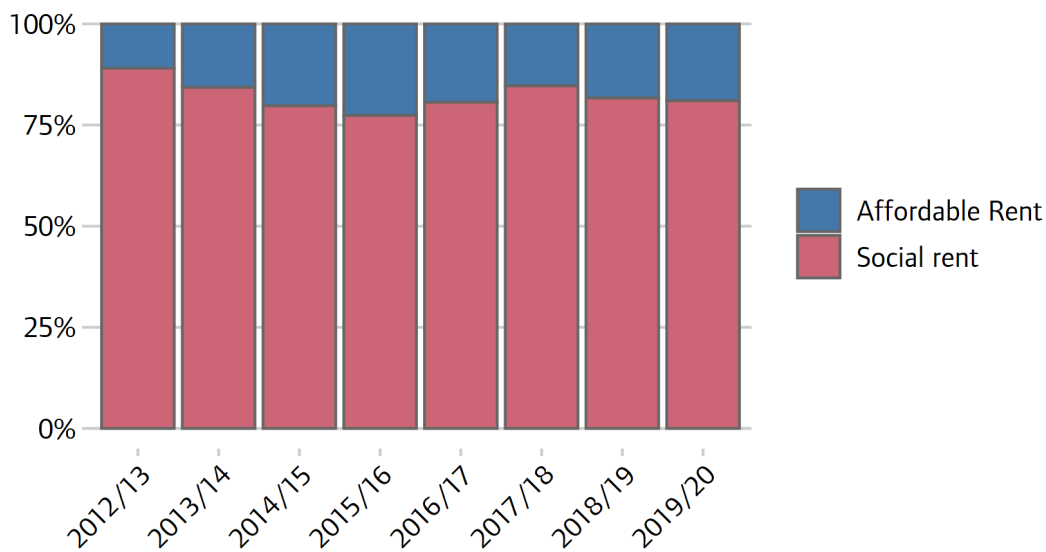
8.4 The chart below shows the number of lettings to general needs social housing by local authority and housing association landlords in London recorded on CORE since 2012/13. Consistent with the survey data shown above, there has been a substantial drop in the number of lettings by both council and housing association landlords over this period, although the trend has stabilised in the last few years.



General needs lettings by landlord type, 2012/13 to 2019/20

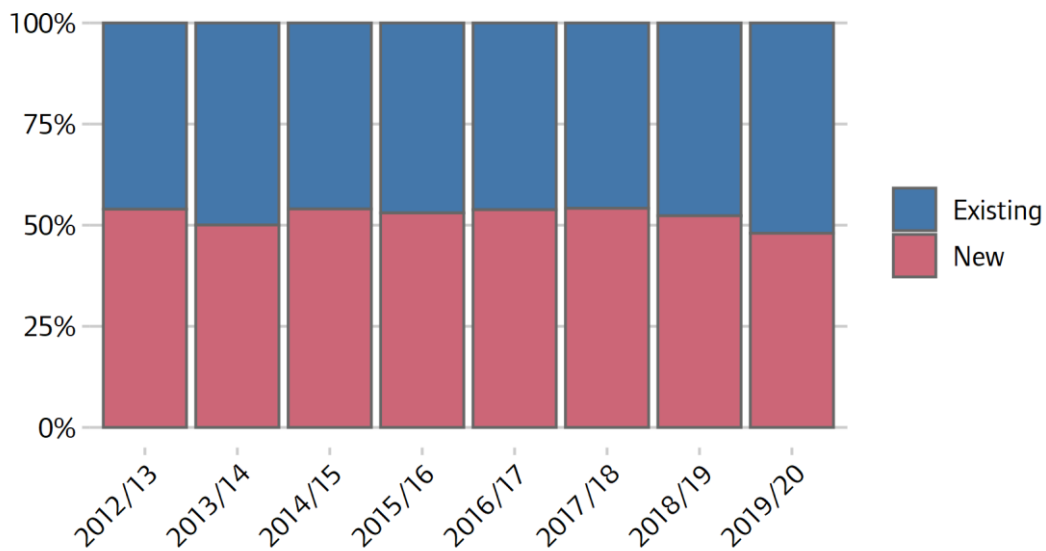
8.5 One reason for the falling rate of mobility into social housing in London is a fall in the number of vacancies generated by mobility out of it. According to the Survey of English Housing and the English Housing Survey, the number of households in London who had moved out of social housing and into private housing in the last year averaged around 14,000 a year in the mid- to late 1990s, but by the mid to late 2010s had fallen to around 5,000 a year. This trend is likely to have been caused in turn by the increases in both private rents and sales prices over that period.

8.6 Affordable Rent was introduced by the coalition government in 2011, and in 2019/20 accounted for 18% of all general needs lettings in London, although its share has stabilised in recent years.



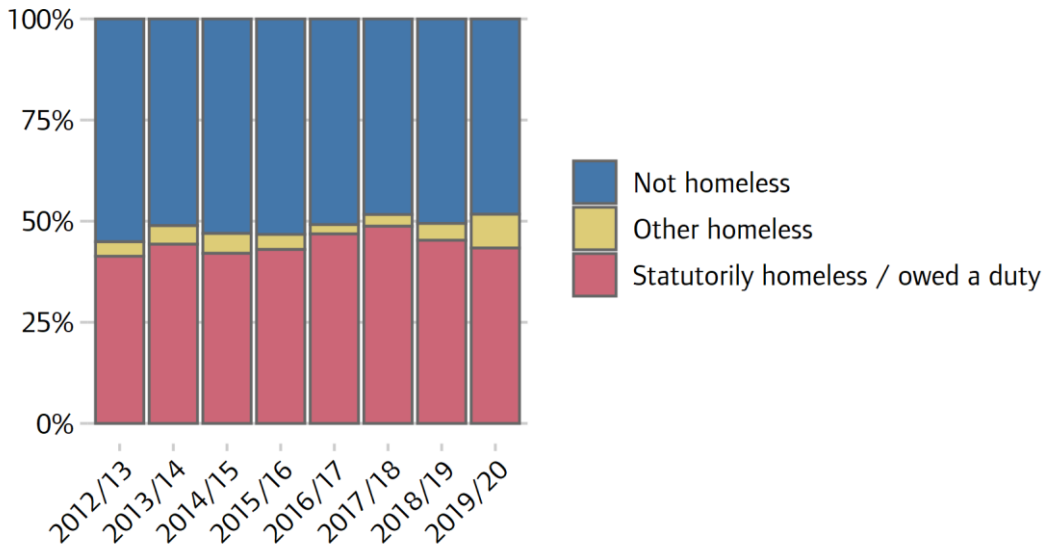
General needs lettings by rent type, 2012/13 to 2019/20

8.7 Tenants new to social housing have accounted for slightly more than half of all lettings to general needs homes in London throughout the period.



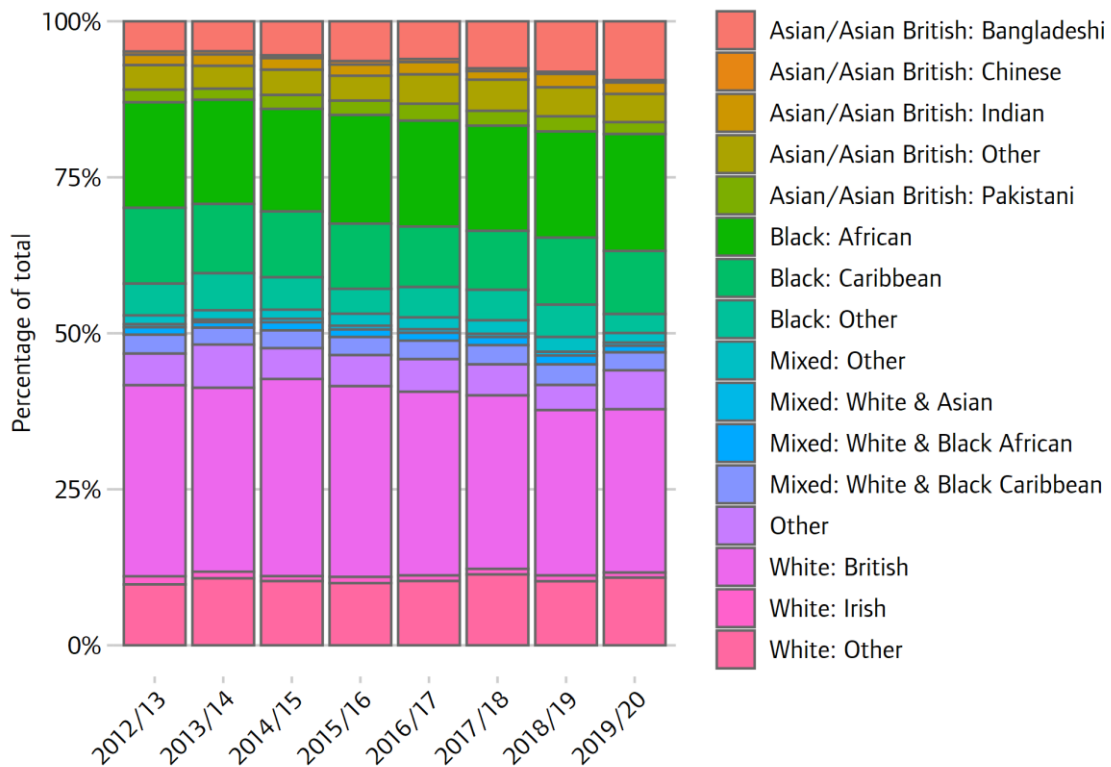
Tenants new to general needs housing, 2012/13 to 2019/20

8.8 Of the tenants new to social housing, the proportion who were homeless before moving into their new home was also relatively steady at around half. As the absolute number of lettings fell over this period, the number of lettings to previously homeless households must also have fallen. Over the same period, the number of homeless households living in temporary accommodation arranged by local authorities in London increased sharply, from around 37,000 in mid-2012 to around 57,000 in mid-2019.



Homelessness status of tenants new to affordable housing

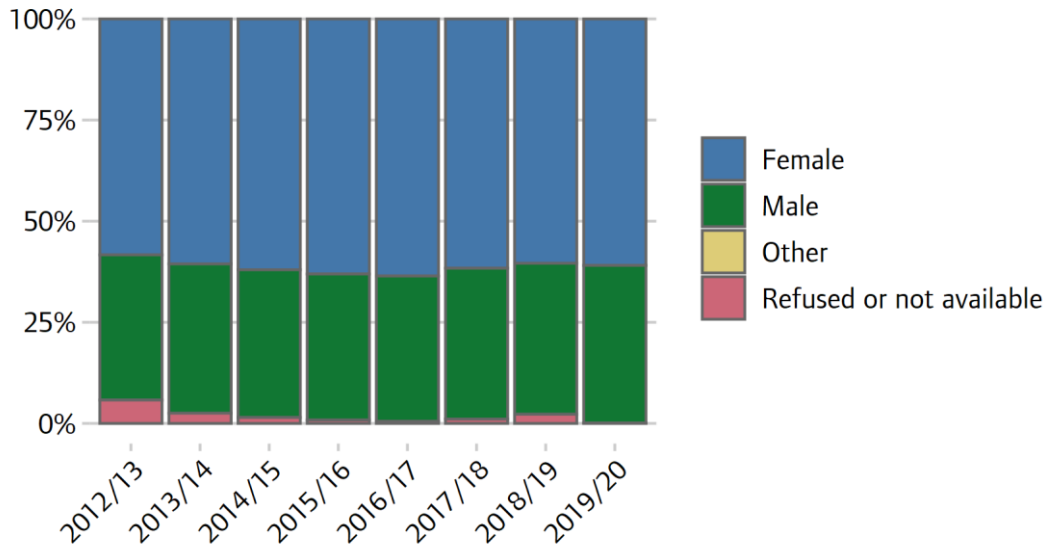
8.9 When comparing the ethnicity of households (as measured by the ethnicity of the household reference person) moving into general needs homes in London since 2012/13, the overall pattern has remained fairly stable. The White British group remains the largest, although its share of the total fell slightly from 27% in 2012/13 to 21% in 2019/20.



Excludes cases where the question was refused or information was not available

Ethnicity of household reference person by housing type, 2012/13 to 2019/20

8.10 Finally, the proportion of households moving into general needs social housing in London who were headed by a woman has been broadly stable since 2012/13.



Gender of household reference person, tenants new to general needs housing