

LONDON
TENANTS
FEDERATION.

November 2019
BRIEFING PAPER

London housing delivery - 2017/18

Using data from the 2019 Annual Monitoring Report of the London Plan

LONDON HOUSING TARGETS AND DELIVERY 2017/18

(from data provided in the October 2019 London Plan Annual Monitoring Report)

SUMMARY

Housing delivery is not meeting Londoner's needs, with its massive under-delivery of social-rented and affordable rent homes. Despite overall targets not being met there was still an over-delivery of market homes.

2017/18 London Plan housing targets

- **42,388** total number of additional homes of all types
- **17,000** 'affordable homes'
- **10,200** social or 'affordable' rent homes (60% of 'affordable' homes target).
- **6,800** intermediate homes (40% of affordable homes target)
- **25,388** market homes

2017/18 London housing delivery

- **32,083** delivered across London (**76%** of target)
- **4,703** 'affordable' homes (**28%** of target and **15%** of all homes delivered)
- **433** social-rented homes (**1.3%** of all homes delivered in London)
- **1,431** 'affordable' rent homes (**4.5%** of all homes delivered in London)
- **1,864** combined social and 'affordable' rent homes (**11%** of the target and **6%** of total homes delivered)
- **2,839** intermediate homes (**42%** of target and **9%** of all homes delivered).
- **27,380** market homes (**108%** of target and **85%** of all homes delivered)

This year had the lowest delivery of social (and affordable rent) homes than in any year since the publication of the first London Plan and decades prior to that.

LONDON HOUSING TARGETS AND DELIVERY - 2017/18

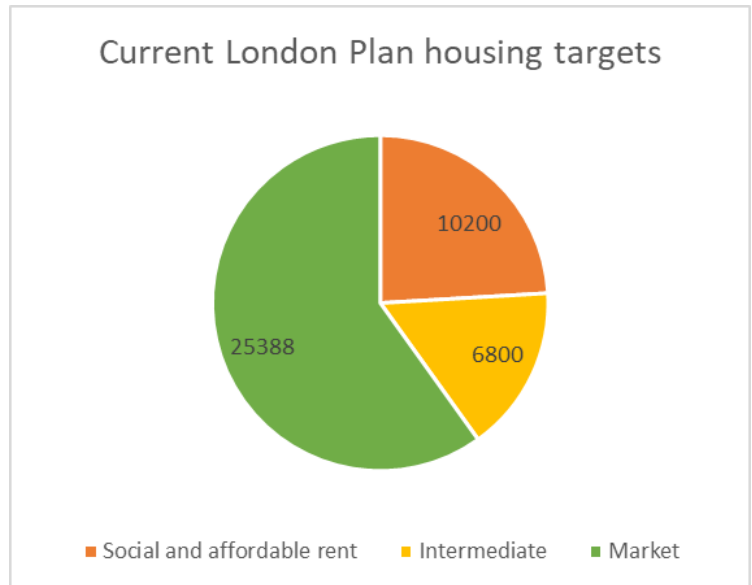
LONDON HOUSING TARGETS:

Housing targets are set in the Mayor of London's *London Plan*. The Plan contains:

- a London-wide net housing target for 42,388 new homes (taking into account any loss e.g. through demolition);
- individual targets for each borough;
- and (in the current Plan) a target for the London Legacy Development Corporation (LLDC).

Additionally, the Plan sets an annual net 'affordable' homes target of 17,000, split into 60% (10,200) social and 'affordable' rent homes (combined) and 40% (6,800) intermediate. As percentages of the total target this is the equivalent to: 24% social and 'affordable' rent homes, 16% intermediate and 60% market homes.

Figure 1



HOUSING DELIVERY: Information on the numbers and types of homes delivered in London are published each year in the Mayor of London's Annual Monitoring Report (AMR). This document is the best available for looking at overall London housing delivery¹. The most recent AMR for 2017/18 was published on 31 October 2019. A total of **32,083**² additional homes were delivered in 2017/18; a 28% drop in the 44,681 homes delivered in 2016/17.

While only 76% of the total target was delivered, as can be seen in figure 2 below, the full London target for market homes was exceeded, comprising 85% of all homes delivered. Only 6% of social (for which there is the greatest need of any type of housing in London) and affordable rent homes were delivered.

Figure 2



Figure 3 p4 provides detail on the current London Plan housing targets and delivery for each of the boroughs and the LLDC.

The LLDC and 18 boroughs failed to meet their targets. Hammer-smith and Fulham, Harrow, Hillingdon and Sutton, however, delivered more than 150% of their targets.

DELIVERY BY HOUSING TYPE: On page 5 we have provided a series of tables looking specifically at (i) social and affordable

¹ However, demolitions are not taken into account until new homes have been developed, which could be some years ahead, making the net totals in the AMR (at the time of publication) inaccurate (where demolitions have taken place).

² The **32,083** homes comprise conventional self-contained homes, non self-contained homes (student housing, hostels, large houses in multiple occupation and care homes) and takes into account the additional homes that were vacant in 2017/18 compared to 2016/17.

rent (ii) intermediate and (iii) market homes.

These show: housing targets (proportional to the individual targets set for the boroughs and LLDC in the London Plan) delivery and percentage delivery of the targets. These are sorted by boroughs delivering the highest to lowest number of homes.

Social and affordable rent homes delivered: (figure 5) Just **1,864** social and affordable rent homes were delivered: **433** social rent and **1,431** affordable rent. Combined, this is just 6% of the homes delivered in London and only 18% of the London Plan target for social and affordable rent homes (which is already miserably low compared to housing need).

This is the lowest number of social rented and affordable rent homes that have been delivered since the first 2004 London Plan (aimed at increasing housing growth) was produced. It is poor delivery, particularly when the Mayor of London's 2017 assessment identified that **30,973** social and low-cost homes need to be delivered each year (for 25 years) to meet ongoing and existing backlog of need.

The total shortfall of social and affordable rent homes (measured against the existing London Plan targets) in 2017/18 was **8,335** social and affordable rent homes.

All but four boroughs delivered less than 50% of their targets. There was a net loss of social rented homes in Brent, Ealing, Enfield, Harrow, Havering, Newham and Sutton, totalling **-655** social rented homes. This is not necessarily equivalent to the number of social rented homes demolished, but simply shows that in each of these boroughs more homes were demolished than delivered. Also see note¹ on page 3.

Intermediate homes delivered: (figure 6). While only 42% of the target for intermediate homes was met, this was 52% more than the social and affordable rent homes delivered. All but 10 London boroughs (Camden, Croydon, Hackney, Islington, Kensington & Chelsea, Lambeth, Southwark and Tower Hamlets) delivered more intermediate than social and affordable rent homes.

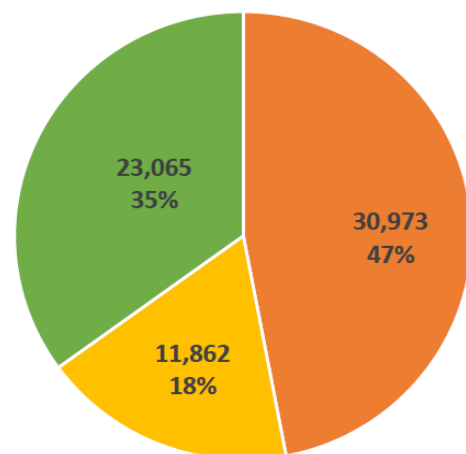
Market homes delivered: (figure 7) 27,380 market homes were delivered; 108% of the target and 85% of all homes delivered. NB the Mayor of London's 2017 assessment of need showed that just 23,065 market homes were needed each year.

Figure 3 - total housing targets and delivery

London Plan targets & delivery 2017/18	Housing targets	Homes delivered	% of targets delivered
Barking and Dagenham	1236	600	49
Barnet	2349	2149	91
Bexley	446	329	74
Brent	1525	1910	125
Bromley	641	686	107
Camden	889	781	88
City of London	141	-150	-106
Croydon	1435	1806	126
Ealing	1297	1447	112
Enfield	798	277	35
Greenwich	2685	1703	63
Hackney	1599	1207	75
Hammersmith & Fulham	1031	1886	183
Haringey	1502	1106	74
Harrow	593	1099	185
Havering	1170	119	10
Hillingdon	559	922	165
Hounslow	822	937	114
Islington	1264	390	31
Kensington & Chelsea	733	397	54
Kingston upon Thames	643	922	143
Lambeth	1559	1360	87
Lewisham	1385	424	31
LLDC	1471	990	67
Merton	411	606	147
Newham	1994	666	33
Redbridge	1123	481	43
Richmond upon Thames	315	227	72
Southwark	2736	173	6
Sutton	363	600	165
Tower Hamlets	3931	1936	49
Waltham Forest	862	1267	147
Wandsworth	1812	2051	113
Westminster	1068	779	73
LONDON total	42388	32083	76

Figure 4 - London housing need in 2017 as assessed by the Mayor of London's office

Backlog need and annual growth combined



Low cost rent Intermediate Market

We calculated the number of market homes delivered as - the total homes delivered (self- and non self-contained homes) minus the social, affordable rent and intermediate homes delivered.

Harrow delivered more than three times its target for market housing while having, at the same time, a loss of 23 social and affordable rent homes. A further seven boroughs delivered more than double their target. In total, 18 delivered more than 100% of their market housing target.

Figure 5 - social and affordable rent targets and delivery.

	Social & affordable rent targets	Social rent delivered	Affordable rent delivered	Social & affordable rent delivered	% of social & affordable rent target delivered
Camden	214	89	51	140	65
Hounslow	198	78	37	115	58
Tower Hamlets	946	190	318	508	54
Richmond upon Thames	76	0	39	39	51
Lambeth	375	81	107	188	50
Croydon	345	13	127	140	41
Kensington & Chelsea	176	66	5	71	40
Hillingdon	134	13	41	54	40
Merton	99	7	29	36	36
Greenwich	646	131	98	229	35
Hackney	385	97	36	133	35
Waltham Forest	207	36	28	64	31
Haringey	361	72	37	109	30
Barnet	565	20	145	165	29
Islington	304	58	0	58	19
Southwark	658	89	15	104	16
Wandsworth	436	0	60	60	14
Redbridge	270	12	25	37	14
Ealing	312	-4	42	38	12
Barking and Dagenham	297	0	36	36	12
Westminster	257	2	15	17	7
Kingston upon Thames	155	9	0	9	6
Lewisham	333	14	5	19	6
Hammersmith & Fulham	248	11	3	14	6
Bexley	107	0	0	0	0
Bromley	154	0	0	0	0
City of London	34	0	0	0	0
LLDC	354			0	0
Havering	282	-8	0	-8	-3
Enfield	192	-14	0	-14	-7
Harrow	143	-63	30	-33	-23
Newham	480	-154	32	-122	-25
Brent	367	-217	18	-199	-54
Sutton	87	-195	52	-143	-164
LONDON total	10199	433	1431	1864	18

We are unclear why the GLA has not published data on LLDC 'affordable' homes delivered, especially as they, like the boroughs, are set an overall housing target and have a Local Plan with housing (including affordable housing) targets.

Figure 6 - Intermediate housing targets and delivery

	Intermediate target	Intermediate delivered	% of target delivered
Sutton	58	180	309
Hammersmith & Fulham	165	223	135
Hounslow	132	129	98
Camden	143	112	79
Barking and Dagenham	198	155	78
Merton	66	47	71
Greenwich	431	294	68
Harrow	95	60	63
Waltham Forest	138	87	63
Newham	320	198	62
Haringey	241	144	60
Ealing	208	108	52
Hackney	257	128	50
Wandsworth	291	142	49
Redbridge	180	85	47
Croydon	230	108	47
Barnet	377	176	47
Lambeth	250	106	42
Westminster	171	65	38
Brent	245	52	21
Kingston upon Thames	103	20	19
Southwark	439	79	18
Hillingdon	90	12	13
Lewisham	222	28	13
Tower Hamlets	631	58	9
Havering	188	15	8
Islington	203	14	7
Bromley	103	7	7
Richmond upon Thames	51	2	4
Enfield	128	3	2
Kensington & Chelsea	118	2	2
Bexley	72	0	0
City of London	23	0	0
LLDC	236		0
LONDON total	6800	2839	42

Figure 7 - Market housing targets and delivery

	Market housing target	Market housing delivered	% of target delivered
Harrow	355	1072	302
Hammersmith & Fulham	618	1649	267
Sutton	217	563	259
Hillingdon	335	856	256
Kingston upon Thames	385	893	232
Brent	913	2057	225
Waltham Forest	516	1116	216
Merton	246	523	212
Croydon	859	1558	181
Bromley	384	679	177
Wandsworth	1085	1849	170
Ealing	777	1301	167
Hounslow	492	693	141
Barnet	1407	1808	129
Bexley	267	329	123
Lambeth	934	1066	114
LLDC	881	990	112
Westminster	640	697	109
Camden	532	529	99
Hackney	958	946	99
Richmond upon Thames	189	186	99
Haringey	900	853	95
Kensington & Chelsea	439	324	74
Greenwich	1608	1180	73
Enfield	478	288	60
Tower Hamlets	2354	1370	58
Barking and Dagenham	740	409	55
Redbridge	673	359	53
Newham	1194	590	49
Lewisham	830	377	45
Islington	757	318	42
Havering	701	112	16
Southwark	1639	-10	-1
City of London	84	-150	-178
LONDON total	25388	27380	108

