

Housing need, targets and delivery in London

2018/19

and delivery of social rented homes **2005-19**

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HOUSING NEED, TARGETS AND DELIVERY IN LONDON 2018/19

AND DELIVERY OF SOCIAL RENTED HOMES IN LONDON FROM 2005 TO 2019

1. INTRODUCTION:

The Mayor of London's London Plan sets an overall annual target for delivery of homes (of all types) in London and separate targets for each London borough or planning authority. The Plan also sets targets for so called 'affordable housing' including social rented, affordable rent (at up to 80% market rents) and intermediate homes.

The London Plan, which was first published in 2004, and its housing targets are periodically renewed or updated. The 2014 London Plan contains relevant targets for the year 2018/19.

The Mayor of London is required to monitor the implementation of his London Plan and the effectiveness of its policies. He publishes an Annual Monitoring Report (AMR). The sixteenth AMR, reporting on 2018/19, was not published until 14 March 2021.

The 2014 London Plan combined targets for social and affordable rent homes, although the AMR provides separate data on the delivery of each. However, we can't be absolutely certain that what the boroughs report as being social rented homes are not in fact affordable rent homes.

In this publication we have used data from the AMR to assess targets against delivery of all types of housing in 2018/19 and on London-wide delivery compared to the housing need in London as assessed by the Mayor of London's office in 2017.

For some years, we have used the London Plan's AMRs to calculate the total number of homes delivered in London since 2005 and the percentage of these homes that are social rented. In this publication (in table 4 on page 5) we provide an update for 2005 to 2019.

2. TARGETS AND DELIVERY

The London Plan housing target is for the net gain of homes. This means that any homes lost, such as those through demolition, should be taken into account. However, demolished homes are not usually taken into account until replacement homes have been built, leaving unreliable data in the AMRs of any one year on the actual net gain of homes.

2a. TARGET FOR ALL TYPES OF HOMES IN 2018/19: 42,388

This target includes:

- conventional (self-contained) homes including new build homes and conversions of existing homes
- non-conventional homes including bedrooms in student halls, large houses in multiple occupation, hostels, co-housing and care homes.

DELIVERY OF ALL TYPES OF HOMES IN 2018/19: 35,699 (84% OF THE TARGET)

- Fifteen London boroughs: Brent, Bromley, City of London, Croydon, Ealing,

Harrow, Hillingdon, Hounslow, Lambeth, Lewisham, Richmond upon Thames, Southwark, Sutton and Wandsworth and the London Legacy Development Corporation delivered more than 100% of the target. See *more about social housing delivery in the table 2 on page 4.*

- The City of London and Hillingdon delivered more than 200% of the London Plan target.

2b. TARGET FOR SOCIAL RENTED AND AFFORDABLE RENT HOMES COMBINED: 10,200

- 1,778 social rented homes were delivered. There was a net loss of 368 social rented homes in five boroughs: Barnet (-80), Bexley (-198), Croydon (-33), Enfield (-19) and Harrow (-38). City of London, Haringey and Richmond Upon Thames delivered no additional social rented homes.
- 1,565 affordable rent homes were delivered.

Targets and delivery of all housing types 2018/19			
Boroughs and LLDC	Housing target	Homes delivered	% of target delivered
Barking and Dagenham	1236	575	47
Barnet	2349	2183	93
Bexley	446	409	92
Brent	1525	1785	117
Bromley	641	658	103
Camden	889	602	68
City of London	141	322	228
Croydon	1435	1766	123
Ealing	1297	2087	161
Enfield	798	533	67
Greenwich	2685	1282	48
Hackney	1599	1372	86
Hammersmith & Fulham	1031	1023	99
Haringey	1502	324	22
Harrow	593	861	145
Havering	1170	479	41
Hillingdon	559	1121	201
Hounslow	822	963	117
Islington	1264	979	77
Kensington & Chelsea	733	-64	-9
Kingston upon Thames	643	480	75
Lambeth	1559	2046	131
Lewisham	1385	1933	140
LLDC	1471	1540	105
Merton	411	238	58
Newham	1994	1537	77
Redbridge	1123	673	60
Richmond upon Thames	315	418	133
Southwark	2736	3523	129
Sutton	363	448	123
Tower Hamlets	3931	645	16
Waltham Forest	862	432	50
Wandsworth	1812	1951	108
Westminster	1068	575	54
LONDON total	42388	35699	84

Table 1.

DELIVERY OF SOCIAL AND AFFORDABLE RENT HOMES COMBINED: 3,343 (33% OF THE TARGET)

- The target was met in only two boroughs: Lewisham and Southwark.
- Two boroughs had a net loss of combined social and affordable rent homes: Barnet (-40) and Bexley (-16), while City of London and Haringey delivered no social or affordable rent homes.

2c. TARGET FOR INTERMEDIATE HOMES: 6,800

DELIVERY OF INTERMEDIATE HOMES: 3166 (47% OF THE TARGET)

- The target for intermediate homes was met in 5 London boroughs - Bexley, Croydon, Ealing, Hounslow and Sutton. As Bexley and Croydon had a net loss of social rented homes, it would seem that at least some demolished social rented homes were replaced by intermediate homes.

2d. TARGET FOR PRIVATE / MARKET HOMES: 25,388

The London Plan doesn't actually set a target for market homes, but we take this to be the total target (42,388) minus the target for 'affordable housing' (17,000).

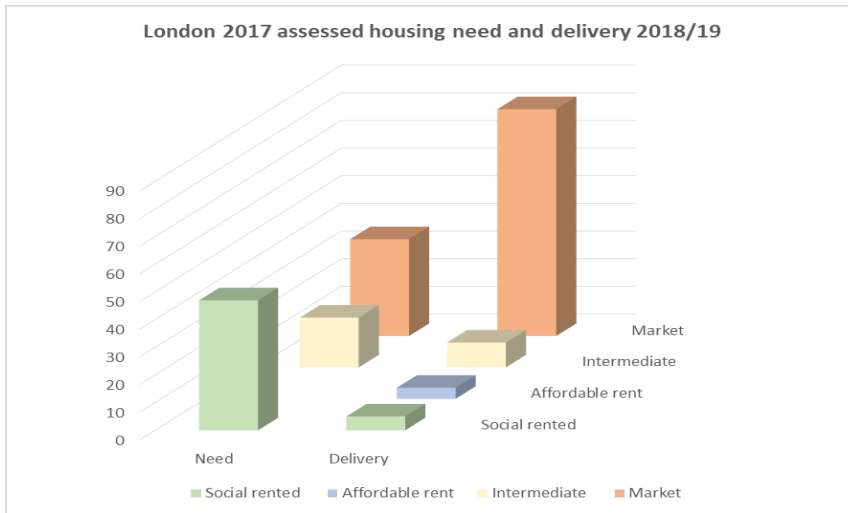
DELIVERY OF PRIVATE / MARKET HOMES: 29,190 (115% OF THE TARGET)

We have calculated this by taking away number of 'affordable homes' delivered (6,509) away from the total 35,699 homes delivered.

3. HOUSING NEED AND DELIVERY

The most recent assessment of London's housing need is the Mayor of London's 2017 Strategic Housing Market Assessment. The need assessed, compared to what was delivered in 2018/19, is as follows

- **SOCIAL RENTED HOMES - NEED: 47% DELIVERY: 5%**
- **PRIVATE MARKET HOMES - NEED: 35% DELIVERY: 82%**
- **INTERMEDIATE HOMES - NEED: 18% DELIVERY: 9%**
- **AFFORDABLE RENT HOMES - NEED: NOT SPECIFIED DELIVERY: 4%**



BOROUGHES SORTED - HIGHEST TO LOWEST % DELIVERY OF SOCIAL RENTED HOMES 2018/19			
Boroughs	Total homes delivered	Social rented delivered	Percentage of social rented
Islington	916	281	31
Camden	827	214	26
Barking and Dagenham	675	162	24
Lewisham	1628	261	16
Lambeth	954	135	14
Sutton	575	77	13
Brent	1740	180	10
Ealing	1758	160	9
Waltham Forest	613	45	7
Hammersmith & Fulham	1041	64	6
Southwark	3208	190	6
Hounslow	1264	72	6
Westminster	803	45	6
Redbridge	765	34	4
Greenwich	1514	56	4
Tower Hamlets	1524	54	4
Havering	454	16	4
Bromley	709	22	3
Hillingdon	990	23	2
Kingston upon Thames	500	7	1
Wandsworth	1925	23	1
Merton	272	3	1
Hackney	1518	15	1
Kensington & Chelsea	115	1	1
Newham	2488	6	0
City of London	351	0	0
Haringey	570	0	0
Richmond upon Thames	419	0	0
Croydon	1588	-33	-2
Harrow	1230	-38	-3
Barnet	2209	-80	-4
Enfield	500	-19	-4
Bexley	486	-198	-41
LONDON total	36129	1778	5

Table 2.

HOW MANY AND WHAT PERCENTAGE OF SOCIAL RENTED HOMES WERE DELIVERED IN YOUR BOROUGH IN 2018/19?

Just 5% of the homes delivered in London in 2018/19 were social rented (or were recorded as such) with the percentage being less than 5% of the total in 20 boroughs.

NOTES:

- The London Plan AMR does not report on the 'affordable homes' delivered by the London Legacy Development Corporation, so we have excluded them entirely in tables 2, 3 and 4.
- Tables 2, 3 and 4 also exclude the 1,766 non-self contained homes delivered in 2018/19 and the minus 2,196 long-term vacant homes or those returning to use, as the AMR does not define the tenure of these homes.

As a result of (i) and (ii) the total of number of homes is a few hundred more than the total used in table 1 on page 3.

DOES DELIVERING MORE HOMES MEAN THAT WE GET MORE SOCIAL RENTED HOMES?

Contrary to the popular belief that where high number of homes are delivered this will enable more social rented homes to be built, we have found no such correlation.

Table 3. is sorted by boroughs delivering highest to lowest numbers of all types of homes. It shows corresponding numbers of private market homes delivered and both the number and percentage of social rented homes delivered.

The highest number of all types of homes was delivered in Southwark, but only 6% were social rented.

Barnet delivered the third highest number of all types of homes, but 100% were private market and there was there was a loss of social rented homes.

The highest number and percentage of social rented homes delivered was in Islington, which was mid point in the highest to lowest list.

HOW MANY AND WHAT PERCENTAGE OF SOCIAL RENTED HOMES WERE DELIVERED IN YOUR BOROUGH FROM 2005 TO 2019?

Table 4 sorts London boroughs from best (Tower Hamlets with 19% delivered of social rented homes) to worst (City of London with 2% delivered). The London total percentage was just 12%.

Boroughs	Total homes delivered	Private Market Homes	Social Rented	% Social Rented
Southwark	3208	2582	190	6
Newham	2488	2248	6	0
Barnet	2209	2213	-80	-4
Wandsworth	1925	1615	23	1
Ealing	1758	1238	160	9
Brent	1740	1298	180	10
Lewisham	1628	1028	261	16
Croydon	1588	1264	-33	-2
Tower Hamlets	1524	1277	54	4
Hackney	1518	1374	15	1
Greenwich	1514	1357	56	4
Hounslow	1264	909	72	6
Harrow	1230	1093	-38	-3
Hammersmith & Fulham	1041	837	64	6
Hillingdon	990	912	23	2
Lambeth	954	682	135	14
Islington	916	577	281	31
Camden	827	561	214	26
Westminster	803	720	45	6
Redbridge	765	614	34	4
Bromley	709	588	22	3
Barking and Dagenham	675	445	162	24
Waltham Forest	613	414	45	7
Sutton	575	432	77	13
Haringey	570	559	0	0
Enfield	500	439	-19	-4
Kingston upon Thames	500	461	7	1
Bexley	486	394	-198	-41
Havering	454	408	16	4
Richmond upon Thames	419	349	0	0
City of London	351	351	0	0
Merton	272	267	3	1
Kensington & Chelsea	115	114	1	1

Table 3.

Numbers and percentages of social rented homes delivered in London boroughs in 2005-2019 - sorted from highest to lowest percentages.			
BOROUGH	Total homes delivered	Social rented homes delivered	Percentage of social rented homes delivered
Tower Hamlets	29852	5578	19
Havering	7375	1246	17
Kensington and Chelsea	3252	541	17
Greenwich	17311	2717	16
Enfield	7207	1124	16
Barking and Dagenham	7411	1115	15
Brent	18500	2570	14
Croydon	21252	2871	14
Hounslow	13264	1790	13
Haringey	10541	1422	13
Islington	21652	2919	13
Lambeth	18636	2419	13
Richmond upon Thames	5435	704	13
Bromley	10012	1255	13
Merton	6786	828	12
Lewisham	16430	2003	12
Westminster	13684	1643	12
Ealing	15754	1860	12
Southwark	24191	2823	12
Camden	12899	1492	12
Newham	20148	2212	11
Hillingdon	12328	1314	11
Hackney	21011	2199	10
Barnet	18793	1966	10
Waltham Forest	9671	900	9
Sutton	6984	532	8
Redbridge	7639	552	7
Kingston upon Thames	5888	414	7
Hammersmith and Fulham	11790	797	7
Bexley	5011	286	6
Harrow	9072	354	4
Wandsworth	21785	821	4
City of London	1604	26	2
TOTAL	433168	51293	12

Table 4.

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