Appendix D - Southwark Key Housing Stats 2020

September 2020

www.southwark.gov.uk





This is the full version of the Southwark key housing data.
For any queries please email housingstrategy2@southwark.gov.uk

Contents

1.0 The demographic and economic context

The London Borough of Southwark is an inner London borough of approximately 11 square miles, stretching from London Bridge and Canada Water on the River Thames in the north, down to Dulwich in the south. Comparisons of housing market related data show that Southwark has characteristics and problems in common with the neighbouring London boroughs of Lambeth, Lewisham and Greenwich. There are also similarities with Tower Hamlets, Hackney, Haringey, Islington and Newham. The population is constantly changing due to migration in and out of the borough, births and deaths, and household formation and break down.

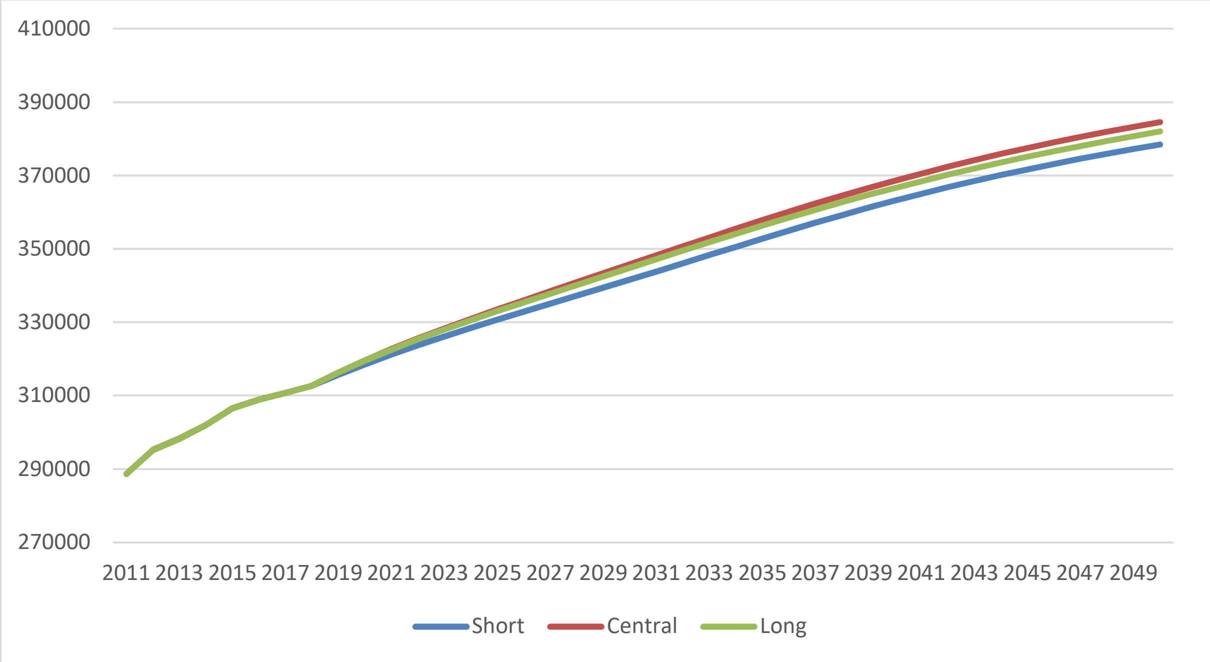
1.01 Population

In 2020 Southwark had an estimated population of 319,610[1]. The GLA has a range of local authority level population projections. The following four projections are shown in the chart below.

- Trend-based projections based on short-term (5 year) trends in migration
- Trend-based projections based on central (10 year) trends in migration
- Trend-based projections based on long-term (15 year) trends in migration

[1] GLA Central trend-based projections - https://data.london.gov.uk/dataset/trend-based-population-projections

Chart1.01a GLA 2018-based Demographic Projections for Southwark ONS Model



Source: - https://data.london.gov.uk/dataset/trend-based-population-projections

Under the central 10 year migration data, the projections for Southwark for 2018 assume an increase of about 3,415 households due to net international migration. It predicts a decrease of 3,379 households due to domestic migration (within the country), the population is also predicted to increase by about 3,267 due to more births than deaths.

Table 1.01b Components of change 2020 – GLA 2018 Trend Based Projections Central 10 year migration data

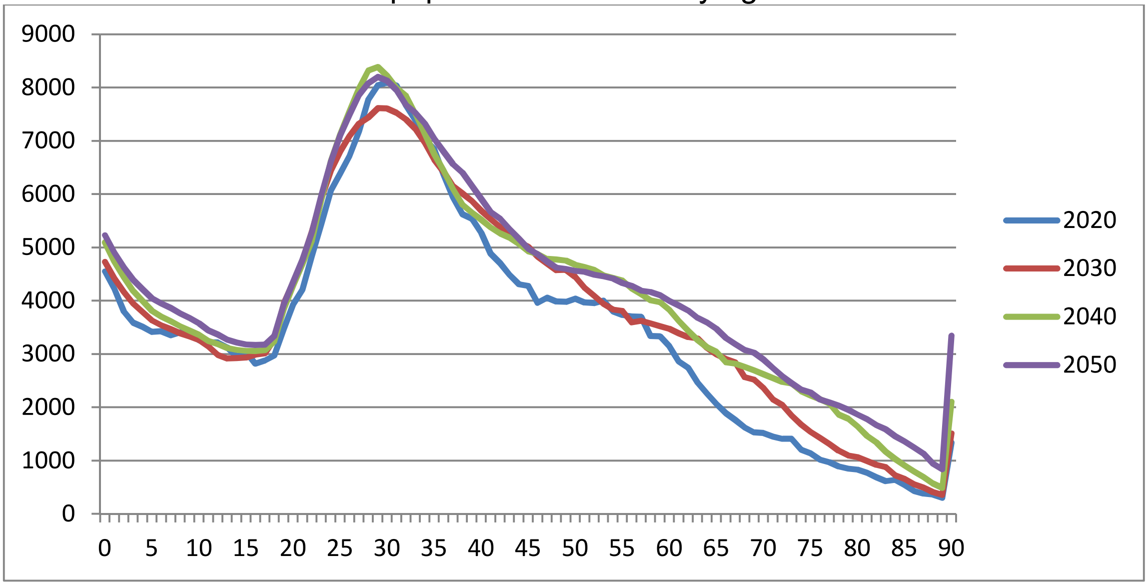
Births	Deaths	Net natural change	Inter national Inflows	Inter national Outflows	Net Inter national	Domestic Inflows	Domestic Outflows	Net Domestic	Total change
4,725	1,458	3,267	8,740	5,325	3,415	26,472	29,851	-3,379	3,303

Source: https://data.london.gov.uk/dataset/trend-based-population-projections

1.02 Age

The GLA 2018 trend based projections estimated the population of Southwark by age for each year up to 2050. Southwark generally has a much lower age profile than the national picture, due to migration into and out of the borough. Using the central term migration based projections, there will be little difference in the populations under around 30 years of age, but the number of people over 30 will increase. The number of people 80 or over is projected to increase from about 7,000 in 2020 to about 17,000 by 2050. The uptick in the over 90s is due to all people over 90 being included together in one total rather than per year of age.

Chart 1.02a – Southwark's population structure by age 2020 to 2050



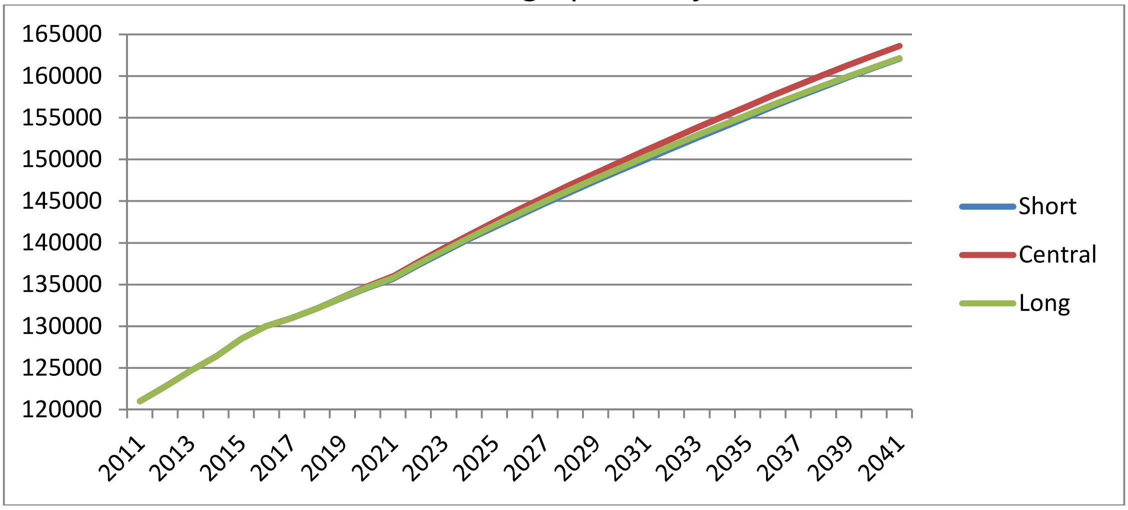
Source: https://data.london.gov.uk/dataset/trend-based-population-projections

1.03 Households

The Census 2011 estimated that there were 120,400 households in Southwark in 2011. This had gone up by 13.8% (approximately 14,600 households) since 2001. This was the fourth highest rise in London behind Tower Hamlets, Hackney and Westminster.

The GLA estimated that there were 134,829 household in Southwark in 2020 using the central trend projections (10 year). This is projected to continue to grow.

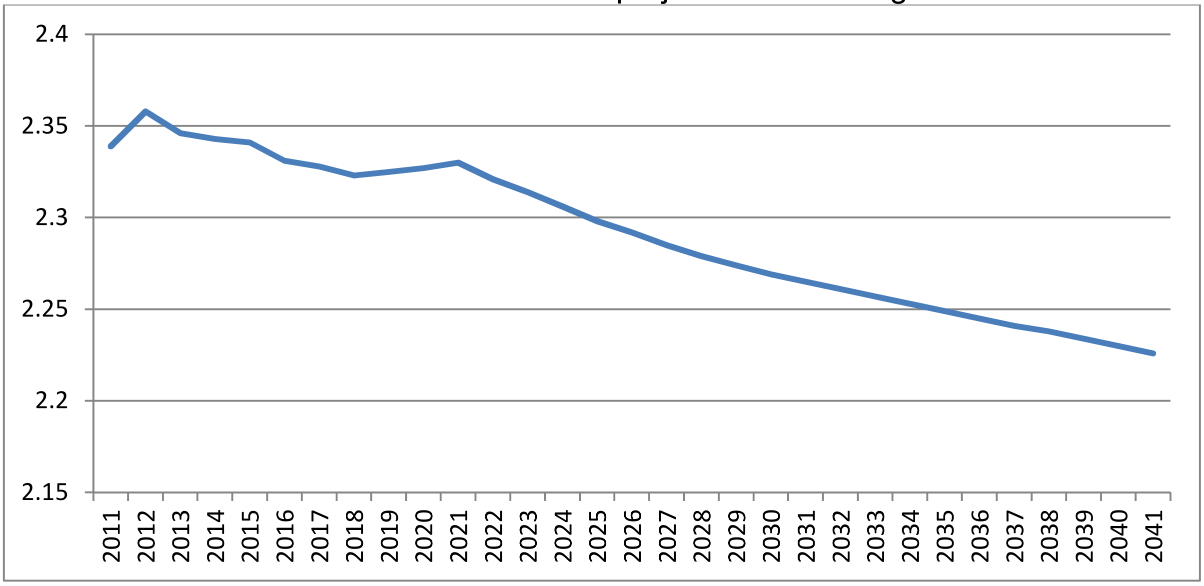
Chart1.03a GLA 2018-based Demographic Projections for Southwark ONS Model



Source: - https://data.london.gov.uk/dataset/trend-based-population-projections

The average household size is projected to continue to gently fall up to 2050.

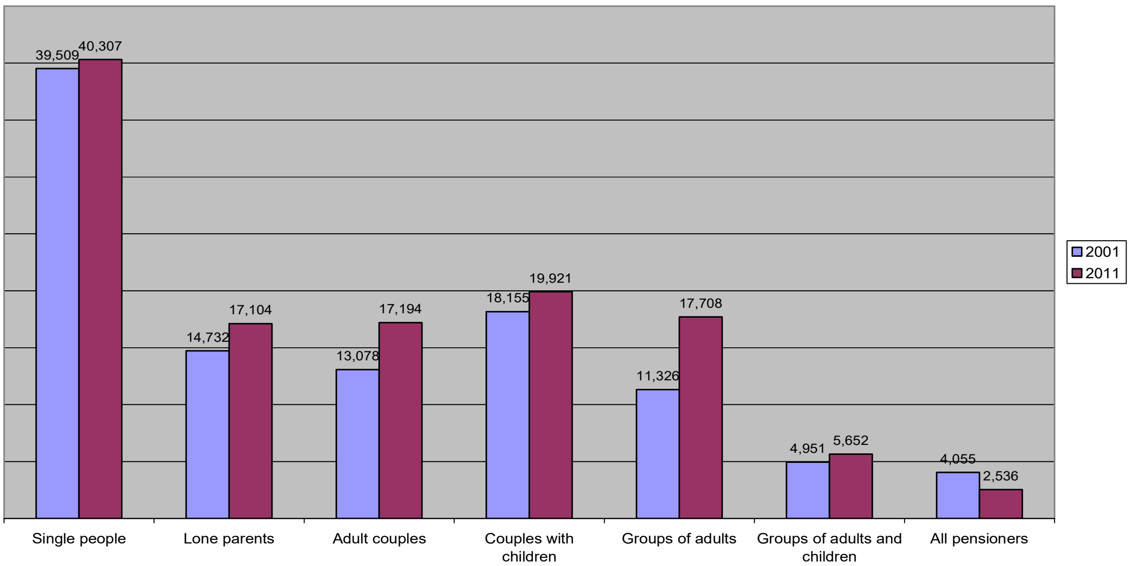
Chart 1.03b GLA 2018 central trend based projections – Average household size



Source: https://data.london.gov.uk/dataset/trend-based-population-projections

In the 2011 census there was a rise in the number of all household groups except all pensioner households (including single people), which fell to 11,544 compared to 16,291 in 2001. In the 2001 census the largest single houshold type was single people (including pensioner households) with 40,300 households (33.5%). This was followed by couples with children with 19,921 households (16.6). The number of lone parent households had increased to 17,104 (14.2%). The number of households made up of groups of adults had increased significiantly to 17,708 up from 11,326 in 2001.

Chart 1.03b Census 2001 and 2011 Household composition by number of households



Source: 2001 and 2011 Census

1.04 Ethnicity

In the 2011 Census the population who defined themselves as white went down from 63% in 2001 to 54.2 % in 2011. The black or black British population was 26.9% which is in line with 2001 population of 25.9%. A higher proportion of people identified themselves as 'mixed', 6.2% in 2011, compared to 3.7% in 2001. 9.4% of the population defined themselves as Asian. "Other" accounted for 3.3%.

Table 1.04a Population by broad ethnic group

Ethnic Group	Population	Proportion
White	156,349	54.2%
Black	77,511	26.9%
Asian	27,192	9.4%
Mixed	17,778	6.2%
Other	9,453	3.3%
Total	288,283	100.0%

Source: Census 2011

60.6% of Southwark's population was born in the UK, which is slightly above the inner London average of 57.8% but below the London average of 63.3%. The figure for England was 86%.

Southwark ranked the highest among all the local authorities for the proportion of residents born in Africa at 12.9% (37,059); especially Nigeria (13,588 people) and Ghana (4,808 people). People born in the Middle East and Asia made up 6.8% (19,591) of the population, and Southwark ranked the second highest among all the local authorities in the proportion of the population born in South America at 2.6% (7,609 people). In 13,258 households (11%) nobody in the household had English as a first language.

1.05 Migration

As stated in the section on population projections, migration plays a major role in the population in Southwark. The GLA 2018 central trend based projections estimated that in 2020 about 8,740 people would move to Southwark from abroad. It estimated about 5,325 would move abroad. In addition, an estimated 26,472 people will move to Southwark from within England but around 29,851 people will move out of Southwark to other places in England. However, the impact of Brexit, the Covid-19 pandemic and new government policy makes it very difficult to accurately predict migration far in to the future.

Previous SHMA (Strategic Housing Market Assessment) research has indicated that the main sources of internal in-migration were the London Boroughs of Lambeth, Lewisham, Wandsworth, Tower Hamlets and Westminster. The main sources of internal out-migration were to Lewisham, Lambeth, Greenwich, Wandsworth and Bromley. Of those leaving Southwark moving within England, 22% moved to other parts of South East London, 46% moved to other parts of London and 32% moved to outside London.

1.06 Population density

In the 2011 census Southwark had the 9th highest population density in England and Wales. The eight local authorities that have higher densities than Southwark are all inner London authorities.

1.07 Income and earnings

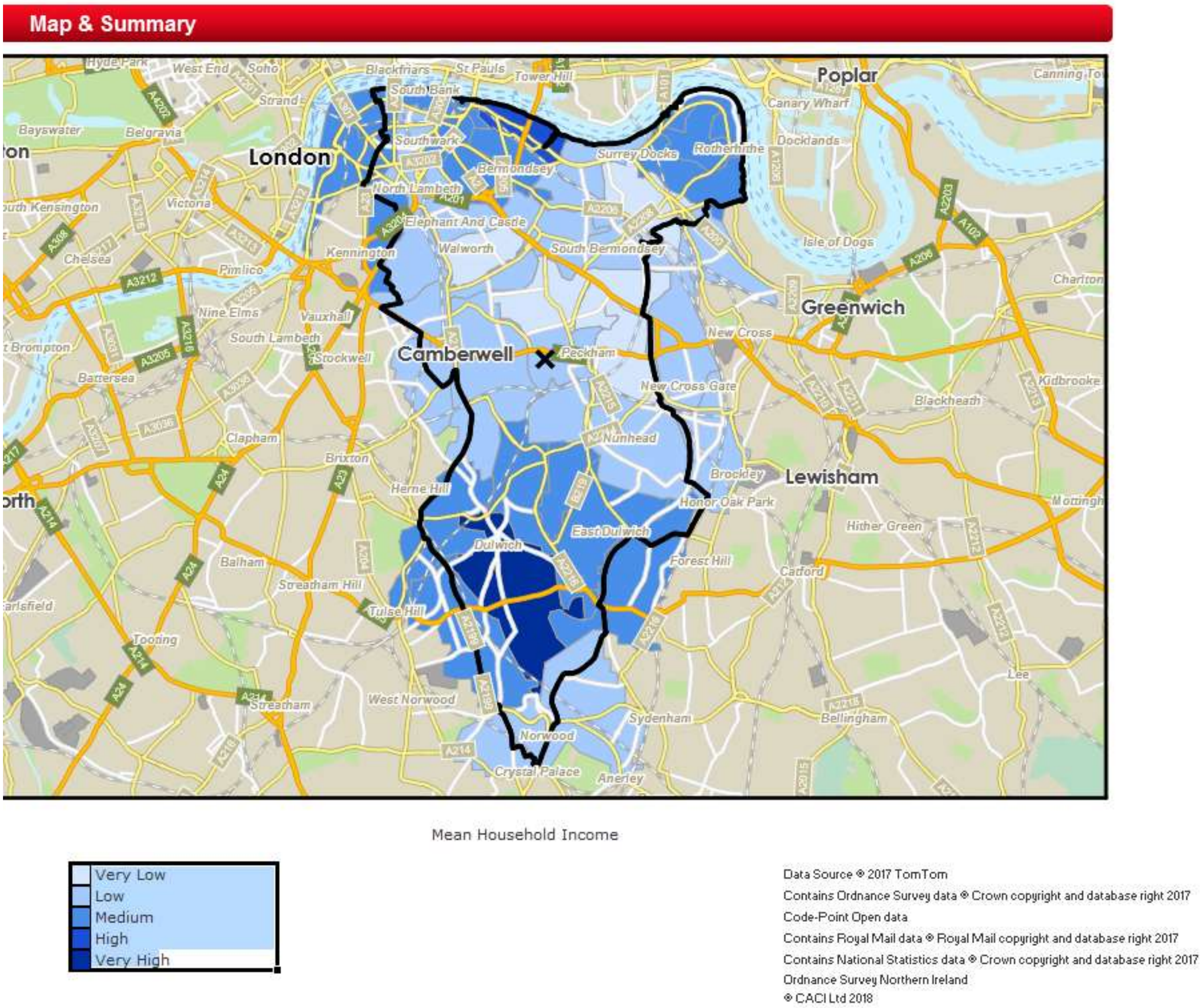
The latest income data for Southwark is from PayCheck, CACI's estimate of household income. It is based upon government data sources together with income data for millions of UK households collected from lifestyle surveys and guarantee card returns.

Table 1.07a Household income distribution in Southwark and mean, median, and upper and lower quartiles - CACI Paycheck data 2018

Less than £5,000	2,617
£5,000 - £10,000	10,707
£10,000 - £15,000	14,332
£15,000 - £20,000	14,964
£20,000 - £25,000	13,273
£25,000 - £30,000	11,861
£30,000 - £35,000	10,773
£35,000 - £40,000	8,760
£40,000 - £45,000	8,011
£45,000 - £50,000	6,248
£50,000 - £55,000	5,914
£55,000 - £60,000	4,727
£60,000 - £65,000	4,329
£65,000 - £70,000	3,320
£70,000 - £75,000	2,599
£75,000 - £80,000	2,022
£80,000 - £85,000	2,223
£85,000 - £90,000	1,924
£90,000 - £95,000	1,462
£95,000 - £100,000	801
£100,000 - £120,000	3,866
£120,000 - £140,000	1,555
£140,000 - £160,000	904
£160,000 - £180,000	486
£180,000 - £200,000	184
£200,000 +	160
Mean Income	£38,922
Median Income	£30,583
Upper Quartile Income	£51,664
Lower Quartile Income	£17,288

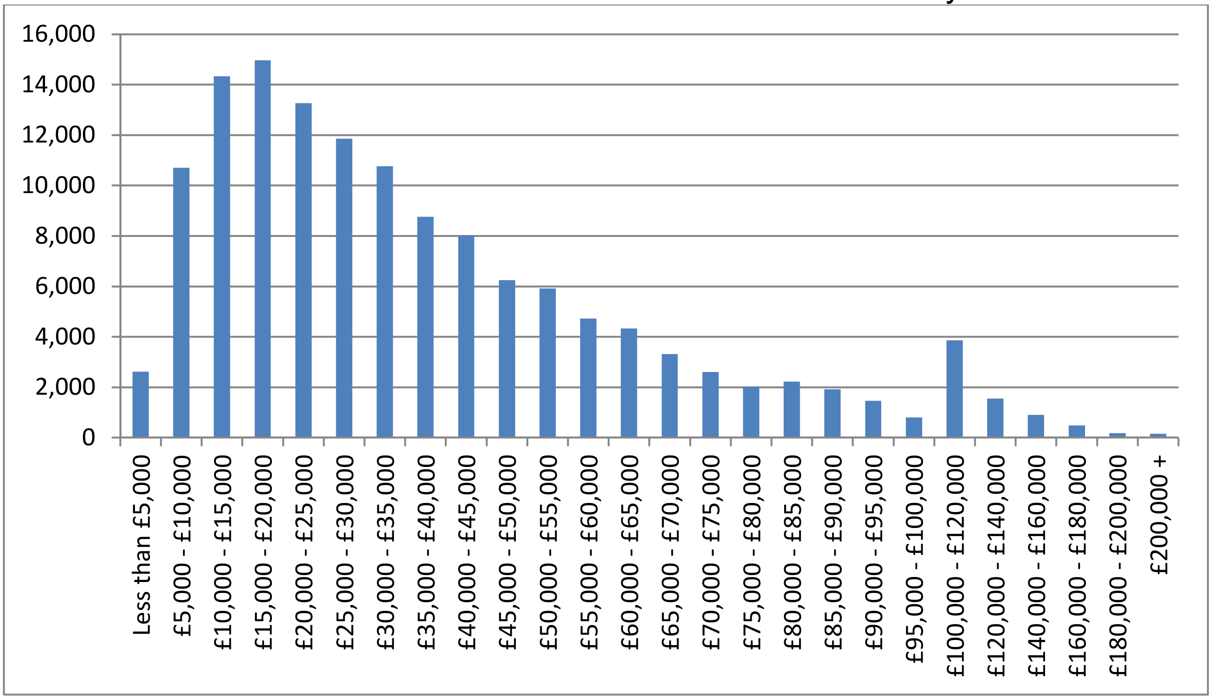
Source: CACI Paycheck Report

Map 1.08b Mean household income



Source: CACI Paycheck Report

Chart 1.07b. Household income distribution in Southwark CACI Paycheck data 2018



Source: CACI Paycheck data quoted on Hometrack's Realdemand website.

1.08 Vulnerable households

- In 2008 in the private sector (including housing associations) 11,400 (15%) of households had a head of household with a disability or longstanding illness or infirmity. There was little variation across the sub areas. In the housing association tenure, this rate was more than double the borough average at 32.4%, compared to 10.9% for owner occupier and 8.4% for private rented households.[2]
- In the private sector (including housing associations) a minimum of £14 million was required to deal with disability / infirmity issues (excluding fees), including £9 million for the redesign of personal washing facilities alone.

In 2011, 18,978 usual residents reported that they had a long-term health problem or disability.[3]

1.09 Deprivation

Across the borough there are large differences in the level of deprivation between areas. While poverty is concentrated in north and central Southwark, hidden pockets also occur in the south. The centre of the borough includes Nunhead and Livesey, some of the most deprived areas.

The English Indices of Deprivation 2019 measured relative levels of deprivation in 32,844 small areas or neighbourhoods, called Lower-layer Super Output Areas, in England. It is based on 39 separate indicators, which are combined, using appropriate

[2] Southwark Private Sector House Condition Survey 2008
[3] 2011 Census

weights, to calculate the Index of Multiple Deprivation 2019. Every Lower layer Super Output Area (LSOA), or neighbourhood, in England is ranked according to its level of deprivation relative to that of other areas.

Southwark is ranked in the bottom quartile of local authorities in England for both the average rank and average score measures.

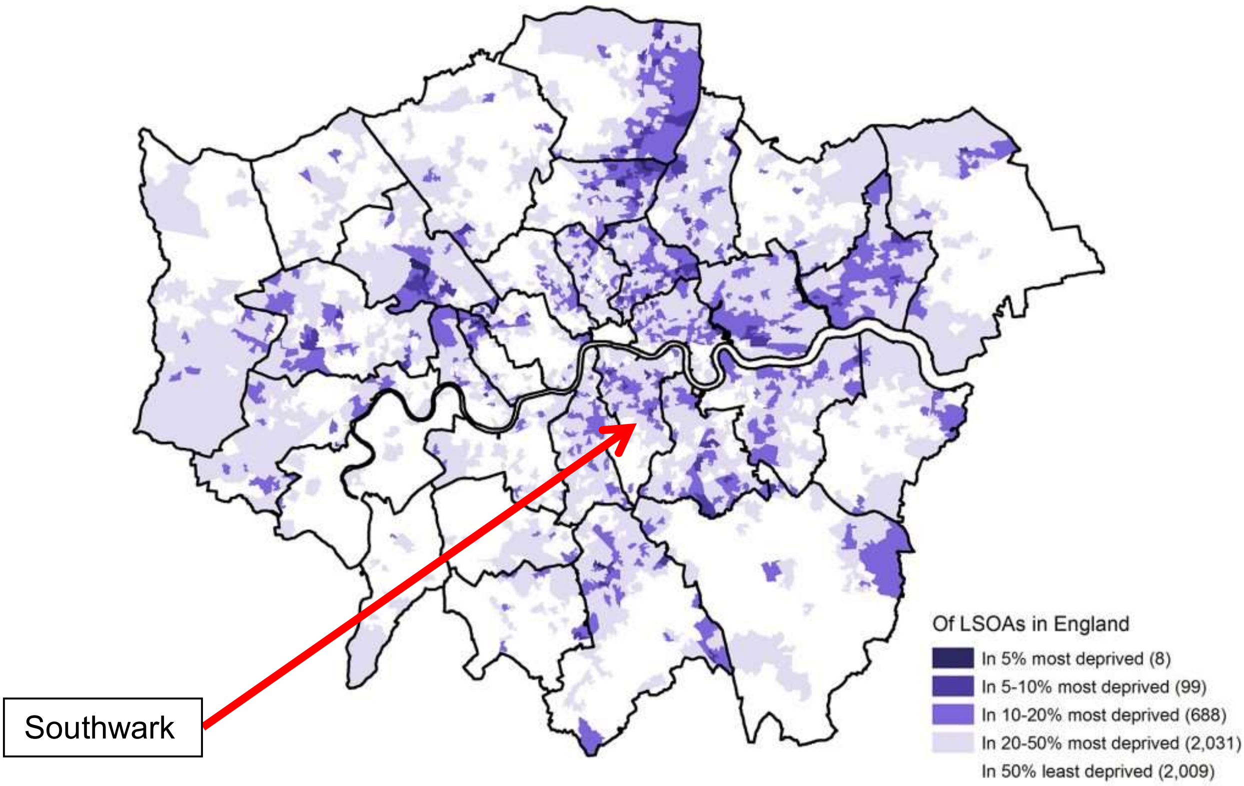
Using the average score method, Southwark was the 72nd most deprived district (compared to 40th in 2015). It was the 8th most deprived in London (8th in 2015).

Using the average rank, Southwark was the 43rd most deprived district (compared to 23rd in 2015) and 9th most deprived in London (9th in 2015).

On the rank of proportion of LSOAs in the most deprived 10% nationally, Southwark was 147th most deprived nationally compared to 135th in 2015 and 8th in London.

5 LSOAs in Southwark fell within the 10% most deprived in England in 2019 compared with 8 LSOAs in 2015. These were in Elephant and Castle, Aylesbury Estate, South Bermondsey, and Queens Road Peckham

"Barriers to housing and services" is a poorly performing category for Southwark. Southwark is 16th highest on the average rank (15th in London) and 16th on the average score (15th in London). Deprivation on this domain can reflect a mixture of local challenges: low incomes in relation to local housing costs, household overcrowding and homelessness; and distance from services (GPs, food shops, schools and post offices).

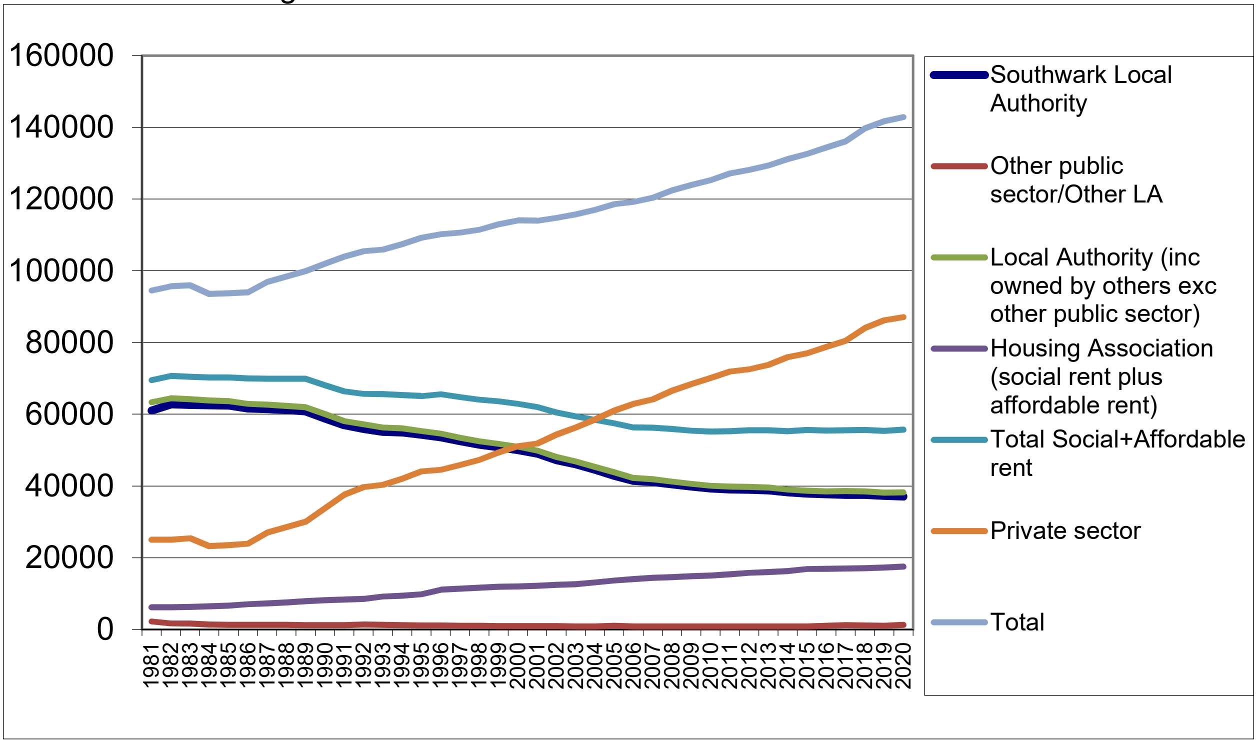


2.0 The housing stock in Southwark

2.01 Stock tenure profile overview

This section gives an overview of changes in the stock. The following sections give more detail by tenure. In 2020, 39% of the stock in Southwark was council rented, RSL social rent or affordable rent. 61% of properties were either owner occupied, shared ownership or private rented.

Chart 2.01a Housing stock in Southwark 1981 to 2020



Source: HIP Returns, HSSAs, ELASH and LAHS 1981-2020
Note: The other LA stock is properties owned by the City of London and Lewisham Council within Southwark.

Between 2010 and 2020 the council rented stock in Southwark (including owned by City of London and Lewisham) fell by 4.8% from 40,120 to 38,183. Total housing association rented stock has risen to 17,516 in 2020, a rise of 16.7% since 2010. Private sector (non-HA) stock in the borough continues to grow. Between 2010 and 2020 private stock levels have risen by 24.1% from 70,156 to 87,096. Overall, the total dwelling stock in the borough has risen by 14.1% between 2010 and 2020 to 142,930. The proportion of private sector stock is significantly lower than London and England. Despite a significant loss of social housing stock through right to buy, Southwark still has the largest proportion of social housing among all London boroughs.

Table 2.01b Housing stock in Southwark 2010 to 2020

Year	Southwark Local Authority		Local Authority (inc owned by others)		Housing Association (social and affordable rent)		Total (LA + HA social + affordable rent)		Private sector (owner occupation and private renting)		Total
2010	39,318	31.4%	40,120	32.0%	15,013	12.0%	55,133	44.0%	70,156	56.0%	125,289
2011	39,043	30.7%	39,845	31.3%	15,404	12.1%	55,249	43.4%	71,931	56.6%	127,180
2012	38,969	30.4%	39,785	31.0%	15,791	12.3%	55,576	43.4%	72,622	56.6%	128,190
2013	38,774	30.0%	39,578	30.6%	15,977	12.3%	55,555	42.9%	73,855	57.1%	129,410
2014	38,227	29.1%	39,029	29.7%	16,253	12.4%	55,282	42.1%	75,958	57.9%	131,240
2015	37,885	28.6%	38,687	29.2%	16,918	12.8%	55,605	41.9%	77,023	58.1%	132,630
2016	37,689	28.0%	38,522	28.7%	16,920	12.6%	55,442	41.2%	78,833	58.7%	134,410
2017	37,506	27.5%	38,553	28.3%	16,953	12.5%	55,506	40.8%	80,499	59.1%	136,140
2018	37,534	26.8%	38,489	27.5%	17,097	12.2%	55,586	39.8%	84,099	60.1%	139,820
2019	37,241	26.3%	38,088	26.9%	17,282	12.2%	55,370	39.1%	86,235	60.9%	141,740
2020	37,066	25.93%	38,183	26.71%	17,516	12.25%	55,699	38.97%	87,096	60.94%	142,930

Source: Housing Strategy Statistical Appendix 2010 to 2020

In the 2011 Census Southwark had the largest proportion of households renting from the local authority at 31.2%, but down as a proportion from 42.3% in 2001. In the 2011 census the owned sector became the largest tenure proportion in Southwark, though significantly lower than the national average.

Table 2.01c Overview of tenure by number of households and as percentage of all households:

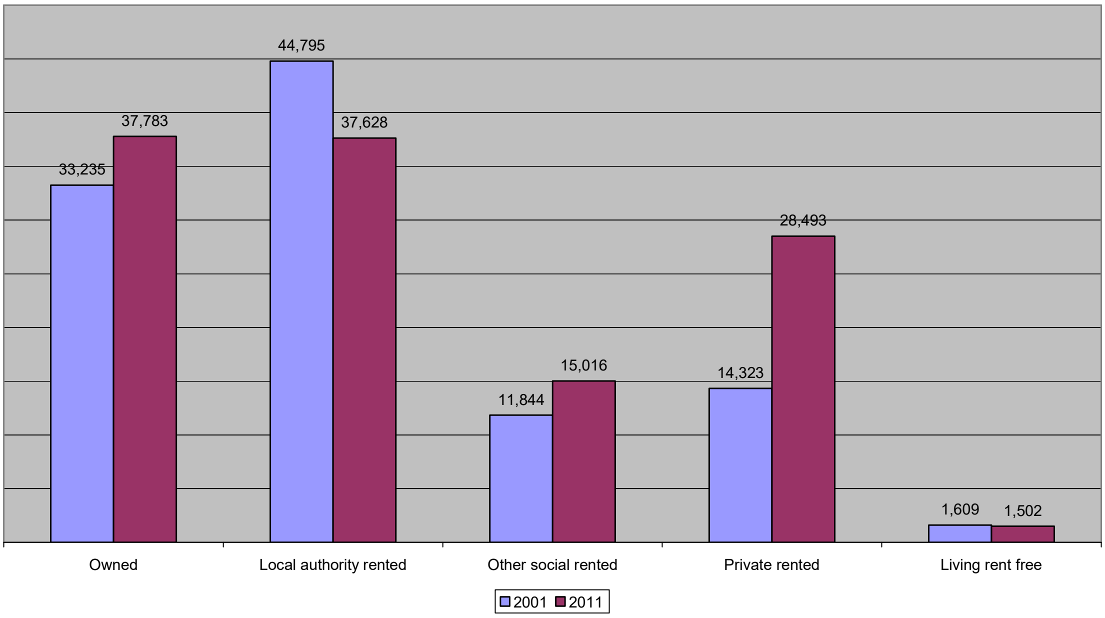
Housing tenure	2001	2001	2011	2011
Owned	33,235	31.4	37,783	31.4
Local authority rented	44,795	42.3	37,628	31.2
Other social rented	11,844	11.2	15,016	12.5
Private rented	14,323	13.5	28,493	23.7
Living rent free	1,609	1.5	1,502	1.2
Total households	105,806	100	120,422	100

Source: Census 2001 and 2011

In 2011, 43.7% of households lived in social rented homes (including housing association properties) compared to 55.1% in the private sector. There were also 1.2% of households who were living rent free.

By 2011 the private rented sector had nearly doubled in size since 2001. It accounted for nearly 1 in 4 households (28,493 households or 23.7% of households).

Table 2.01d The changing tenure profile of Southwark between 2001 and 2011 (households)



Source: Census 2001 and 2011

The data on tenure and age in Southwark shows that 40.8% of owned or shared ownership HRPs are aged 35 to 49, whilst young people aged 24 and under account for only 1.5% of those who own their own home. The younger age bands (under 24 and 25-34) are heavily represented among the private rented sector.

Table 2.01e Age and Housing tenure

Age (HRP)	Owned or shared ownership	Rented from council (Local Authority)	Other social rented	Private rented or living rent free	All tenures
Age 24 and under	1.5%	4.3%	4.3%	12.0%	5.3%
Age 25 to 34	19.5%	14.2%	16.7%	46.9%	24.3%
Age 35 to 49	40.8%	35.1%	39.6%	30.1%	36.2%
Age 50 to 64	24.4%	26.3%	25.2%	7.5%	20.9%
Age 65 to 74	7.1%	9.9%	7.4%	1.8%	6.7%
Age 75 to 84	4.9%	7.3%	4.8%	1.1%	4.7%
Age 85 and over	1.7%	3.0%	2.1%	0.6%	1.9%
All ages	31.4%	31.2%	12.5%	24.9%	100%

Source: Census 2011

There are significant variations across different ethnic groups and housing tenure, with a higher than average proportion of white residents living in owner occupied housing, a higher than average proportion of black residents living in council rented tenure, and a higher than average proportion of Asian/Asian British residents living in the private rented sector.

Table 2.01f Ethnic Group and Housing tenure

Ethnic Group (HRP)	Owned or shared ownership	Rented from council (Local Authority)	Other social rented	Private rented or living rent free	All tenures
White	37.9%	24.1%	10.5%	27.6%	100%
Mixed/multiple ethnic group	23.8%	32.4%	15.1%	28.7%	100%
Asian/Asian British	33.9%	20.4%	8.5%	37.2%	100%
Black/African/Caribbean/Black British	16.6%	52.2%	18.3%	12.9%	100%
Other ethnic groups	19.0%	36.7%	13.7%	30.6%	100%
All ethnic groups	31.4%	31.2%	12.5%	24.9%	100%

Source: Census 2011

2.02 Stock type profile

The proportion of people living in flats in Southwark is 75%, significantly higher than nationally at 22% and in London 52%, however it is similar to the inner London level of 73%.

Table 2.02a Borough comparisons: Household spaces and accommodation type

Area name	Detached House	Semi-detached House	Terraced House	House total	Purpose-built flats	Flat in Converted or shared house (including bed-sits)	Flat, maisonette or apartment: In a commercial building	Flat total	Caravan/mobile/temporary structure
ENGLAND	22%	31%	24%	77%	17%	4%	1%	22%	0%
LONDON	6%	19%	23%	48%	38%	13%	2%	52%	0%
Inner London	2%	6%	18%	27%	51%	20%	2%	73%	0%
Outer London	9%	28%	26%	63%	28%	8%	2%	37%	0%
Bexley	7%	44%	25%	76%	21%	2%	1%	24%	0%
Bromley	18%	30%	22%	70%	22%	6%	2%	30%	0%
Greenwich	4%	19%	31%	54%	38%	7%	1%	46%	0%
Lewisham	3%	13%	28%	45%	36%	18%	2%	55%	0%
Southwark	2%	6%	16%	24%	63%	11%	2%	75%	0%
Lambeth	2%	8%	16%	27%	48%	23%	1%	73%	0%

Source: Census 2011 Table KS401EW

Within the Greater London area, Southwark has the eighth highest proportion of flats/maisonettes. Within the South East London sub-region, it has the highest proportion of flats/maisonettes.

2.03 Local Authority stock breakdown

Between 2010 and 2020 the council rented stock in Southwark (including owned by City of London and Lewisham) fell by 4.8% from 40,120 to 38,183. This has fallen significantly since its peak of 64,490 in 1982.

In April 2020 Southwark Council's rented stock in Southwark was 37,066, which excludes 13 rented properties in Bexley and some shared ownership and social homebuy properties. Southwark Council has retained all its stock apart from one stock transfer, which was the transfer of 296 properties in Dawson's Heights Estate in March 1998. There are 2,982 TMO tenanted properties and 1,648 TMO leasehold properties.

In April 2020 there were also 1,117 dwellings in the borough owned by other local authorities or public sector bodies. The City of London owned 1,073 and Lewisham Council owned 44.

In April 2019 Southwark Council had the 4th largest local authority rented stock in the country and the largest in London. Only Birmingham, Leeds and Sheffield had a larger LA rented stock. 2020 data is not yet available.

Table 2.03a Local authority stock figures for April 2019

	Lower and Single Tier Authority Data	**2019**
1	Birmingham	60,838
2	Leeds	55,292
3	Sheffield	39,260
4	Southwark	37,254
5	Sandwell	27,595
6	Bristol	26,937
7	Nottingham	25,535
8	Newcastle upon Tyne	25,261
9	Kingston upon Hull	23,890
10	Lambeth	23,619

Source: MHCLG Local authority housing statistics - full data 2018-19
https://www.gov.uk/government/statistical-data-sets/local-authority-housing-statistics-data-returns-for-2018-to-2019

Sales and Right to buy (RTB)

Since the right to buy was introduced Southwark Council's rented stock level has fallen to 37,066 (excluding 13 properties owned in Bexley). In March 2003, the maximum discount in 41 areas in London and the South East (including Southwark) was reduced from £38,000 to £16,000. In Southwark around 7,500 RTB applications were received just prior to the changes. As a result there was a large increase in RTB sales. After this dramatic increase there was a decrease to 2006/07 to around 20-25 RTB sales per year. In April 2012 the Government increased the caps to £75,000 nationally. In March 2013 this was increased to £100,000 in London. This has caused a significant increase in applications and right to buy sales in Southwark. In 2019/20 657 right to buy applications were received and there were 87 right to buy sales. There was a further 2 social home buy sales and 4 other sales, totalling 93 sales.

Chart 2.03d Right to buy yearly sales and total sales in Southwark 1998/99 to 2019/20

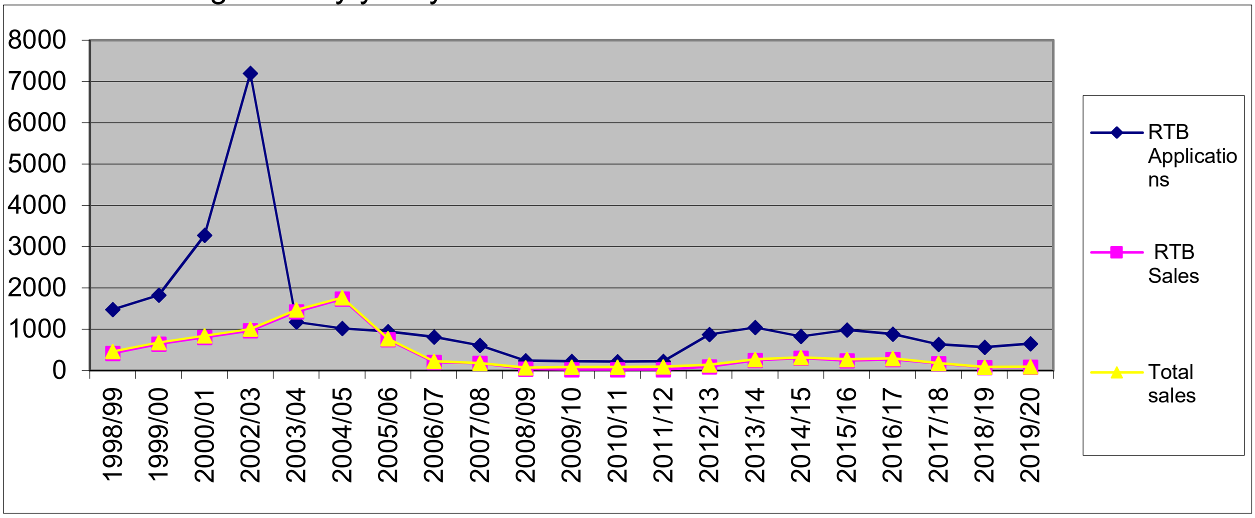


Table 648 Social housing sales: Local authority stock sold through right-to-buy and other council house sales (plus P1B data 2010+2011, ELASH 2012 and LAHS 2013-20)

Council Homeowners (Leaseholders and service charge payers)

As of 1st April 2020 there were 13,777 Southwark Council right to buy leaseholders, 14 social homebuy, and 1,232 households who own the freehold but pay a service charge to Southwark Council and a further 627 other sales. So in total there are around 15,650 Council homeowners. There are a further 2,000 freeholders who do not pay a service charge. Therefore the council has a direct role with about 53,000 properties (excluding the 2,000 freehold properties who pay no service charges).

2.04 Housing Association stock breakdown

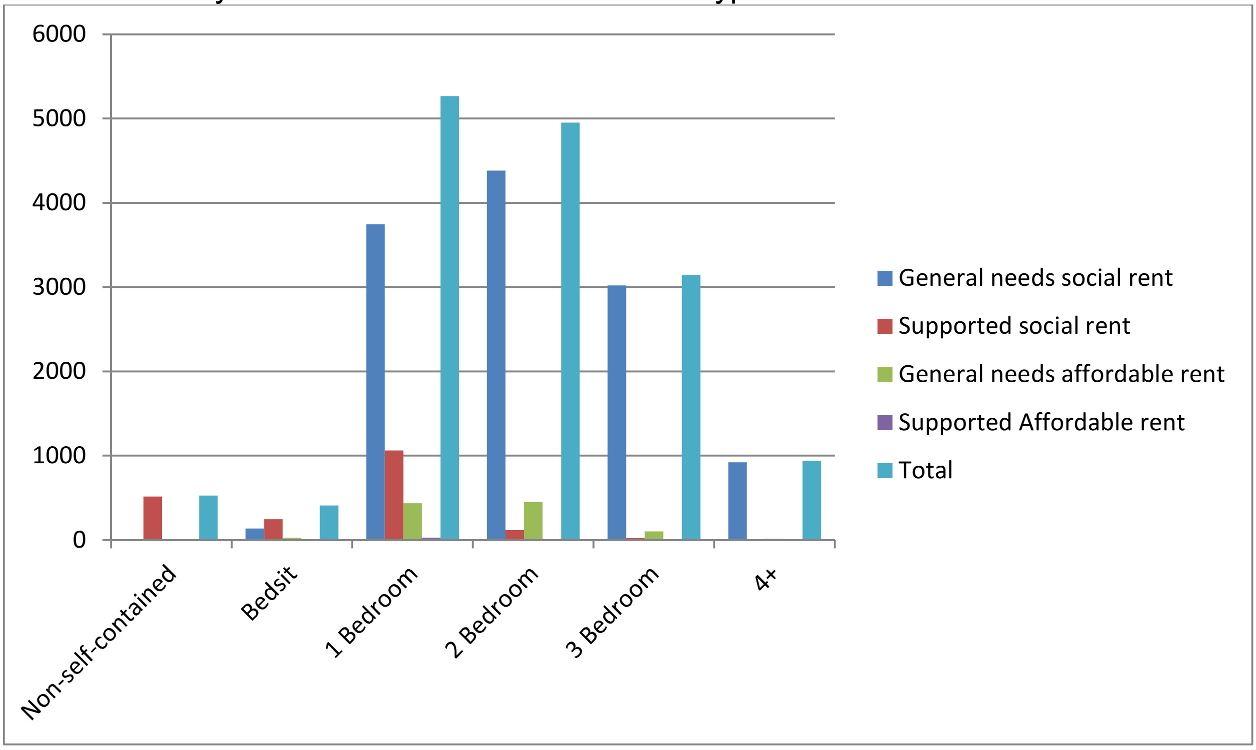
The total housing association rented stock in 2019 was 17,282 in 2019, a rise of 16% since 2009. 15,119 of these were general needs stock.

Table 2.04a Total low cost housing association units in Southwark

				Owned	**Managed**
Low cost rental	General needs			15,119	14,242
	General needs self-contained			14,853	13,976
	General needs non-self-contained			266	266
	Supported housing			1,481	1,185
	Housing for older people			682	622
Low cost home ownership (LCHO)*				2,941	88
Total Southwark				**20,223**	**16,137**

Data on the size of HA homes (number of bedrooms) is only available for bigger providers that make up 70% of the HA stock. Of those, the largest proportion of the stock is one bed stock at 35% followed by two bed (32%) and three bed (21%).

Chart 2.04b Housing association rented stock (large private registered providers) broken down by number of bedrooms and tenure type 2019



Source: SDR2019

Table 2.04c Top 15 Housing Associations in Southwark by overall stock size 2019

Rank	Housing Association	Number of additional LAs PRP operates in (not shown for regional totals)	Total Social Stock (unweighted)	% Total Social Stock in area	% of PRPs total Social Stock
1	Peabody Trust	39	3,525	17.4%	7.7%
2	London & Quadrant Housing Trust	101	2,783	13.8%	3.8%
3	Hyde Housing Association Limited	58	2,190	10.8%	8.4%
4	Optivo	64	1,788	8.8%	4.5%
5	Hexagon Housing Association Limited	6	1,515	7.5%	36.1%
6	Wandle Housing Association Limited	13	1,410	7.0%	20.1%
7	Clarion Housing Association Limited	176	1,182	5.8%	1.1%
8	Notting Hill Genesis	85	1,039	5.1%	2.3%
9	Southern Housing Group Limited	90	800	4.0%	3.2%
10	Metropolitan Housing Trust Limited	141	648	3.2%	1.5%
11	The Guinness Partnership Limited	159	618	3.1%	1.1%
12	The Riverside Group Limited	150	335	1.7%	0.7%
13	Notting Hill Home Ownership Limited	78	313	1.5%	5.6%
14	Paragon Asra Housing Limited	71	191	0.9%	0.9%
15	Habinteg Housing Association Limited	83	178	0.9%	5.5%

Source: SDR2019 - https://www.gov.uk/government/statistics/statistical-data-return-2018-to-2019

2.05 Private rented sector

There is no regular source of data on the size of the private rented sector as stock can change from owner occupied to private rented and vice versa without having to notify the council. Therefore the most reliable source of data on the private rented sector is the census. You can then apply the census stock proportions for the private sector to gain an estimate of the private rented sector.

In the census 2011, 24.9% of households were living in the private rented sector (including those living rent free). During 2001-2011 the number of PRS households increased by 88.3%. 17.2% were households with dependent children. 39% of PRS households with dependent children are overcrowded (bedrooms occupancy rating). The proportion of households in the “Other” household type category (not consisting of a family or single person) has grown to 40.1% of all PRS households.

At the time of the census 2011 43% of the private sector stock was private rented. Applying this proportion to the current estimate of private stock gives an estimated private rented stock of 37,081 private rented properties in Southwark, or 26% of the total stock in Southwark. The December 2019 report into the housing condition of PRS stock in Southwark puts this as high as 43,000.

In 2014 the South East Boroughs of Bexley, Bromley, Greenwich, Lewisham and Southwark, along with Lambeth, commissioned Cobweb to research the lower quartile of the private rented sector. The following is a few key findings for Southwark from that research. The final report is available online at
http://www.southwark.gov.uk/info/200141/housing_strategy/840/housing_statistics
This research found that 24% of renters had been in their properties for less than a year. 33% had been there for 1-2 years and 29% for 2-5 years. 9% had been there for 5-10 years and 4% more than ten years. 60% had tenancy agreements of one year, while 16% had six monthly and 3% monthly. 9% had no tenancy agreement.

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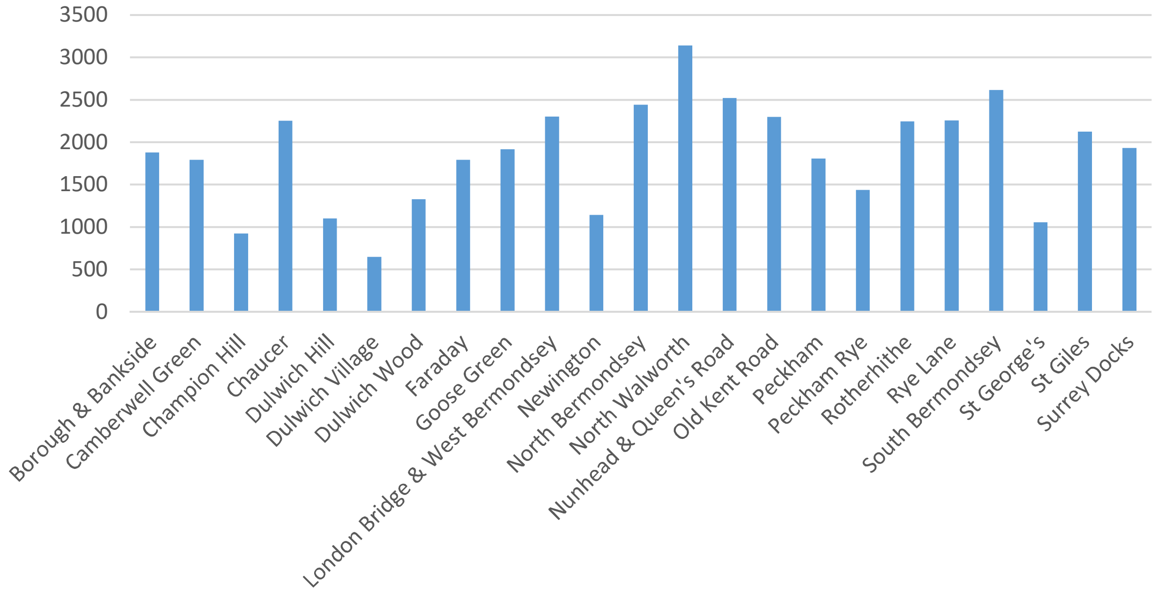
Tenants were typically paying about £317 in agent’s fees, £1,000 on a deposit and £1,064 in advance rent. 66% were letting directly with a landlord compared to 30% with a letting agent. 18% of renters surveyed were receiving housing benefit. Given the typically high rents a large proportion of households had fairly low income levels.

The PRS in Southwark is distributed across all 23 wards. The number of PRS per ward ranges from 3,140 (North Walworth) to 649 (Dulwich Village). The percentage of PRS properties in each ward ranges between 38.4% (North Walworth) and 16% (Dulwich Village). Therefore, 21 out of 23 Southwark wards have a higher percentage PRS than the national average in 2019 (19.4%).

Chart 2.05a Number of PRS dwellings by ward

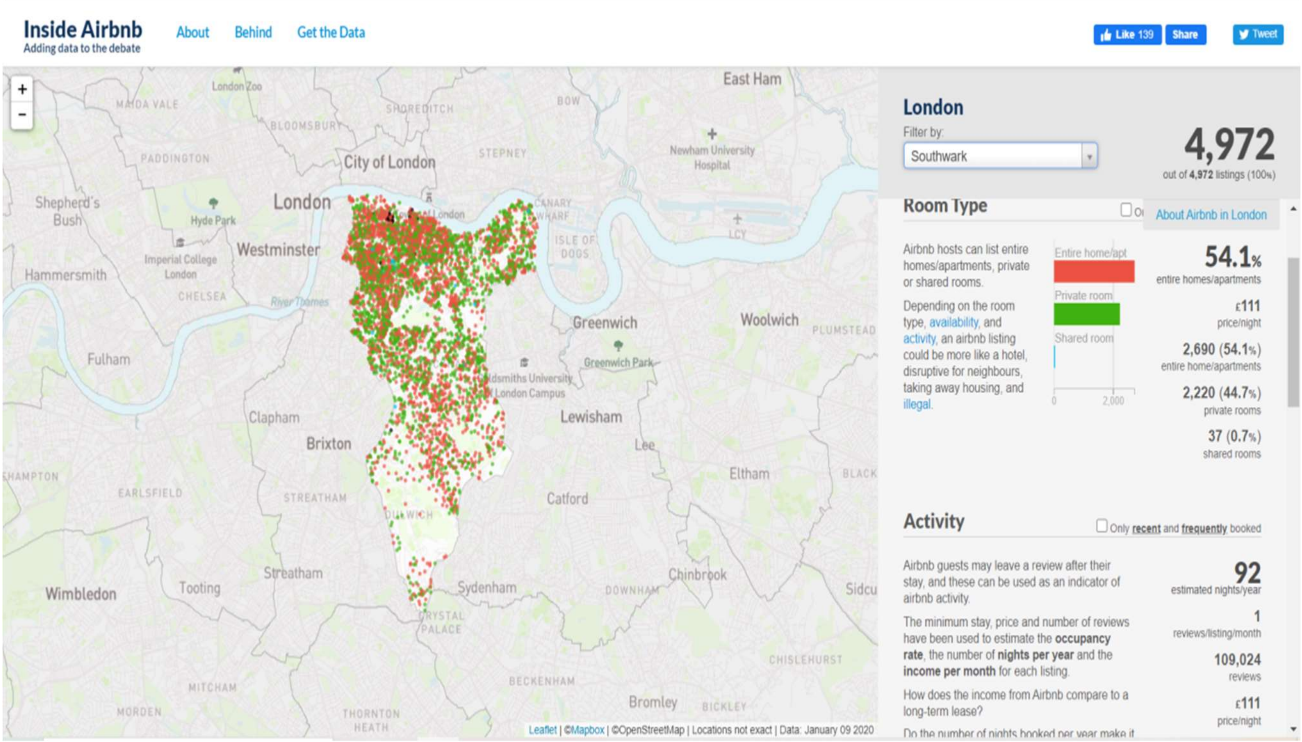


Source: London Borough of Southwark Private Rented Sector: Housing Stock Condition and Stressors Report - December 2019 - Ti 2019, map by Metastreet.

2.06 Short term lettings

There has been a big rise in short term lettings in Southwark as across most of London. In August 2020 Southwark had 4,972 short term rental properties listed on Airbnb.

Map 2.06a Snapshot of Southwark Airbnb advertised properties (10/8/20)



According to a GLA study the number of Airbnb listings in London more than quadrupled in four years, growing in all boroughs and for each listing type.[4] This research was published in February 2020, before the pandemic.

The majority of actively listed Airbnb properties across London (77%) were estimated to be occupied for under 90 nights in the year. However, the study suggests a significant number of listings were occupied for more than 90 nights as of May 2019. Half of the listings estimated to be occupied for over 90 nights in the year were in just five Inner London boroughs: Camden, Kensington and Chelsea, Southwark, Tower Hamlets and Westminster.

The number of listings has grown in all boroughs and among each listing type over this period. Westminster had the biggest increase, with 6,640 additional listings recorded. The number of listings increased by over 3,000 in Camden, Hackney, Islington, Kensington and Chelsea, Southwark, Tower Hamlets and Wandsworth.

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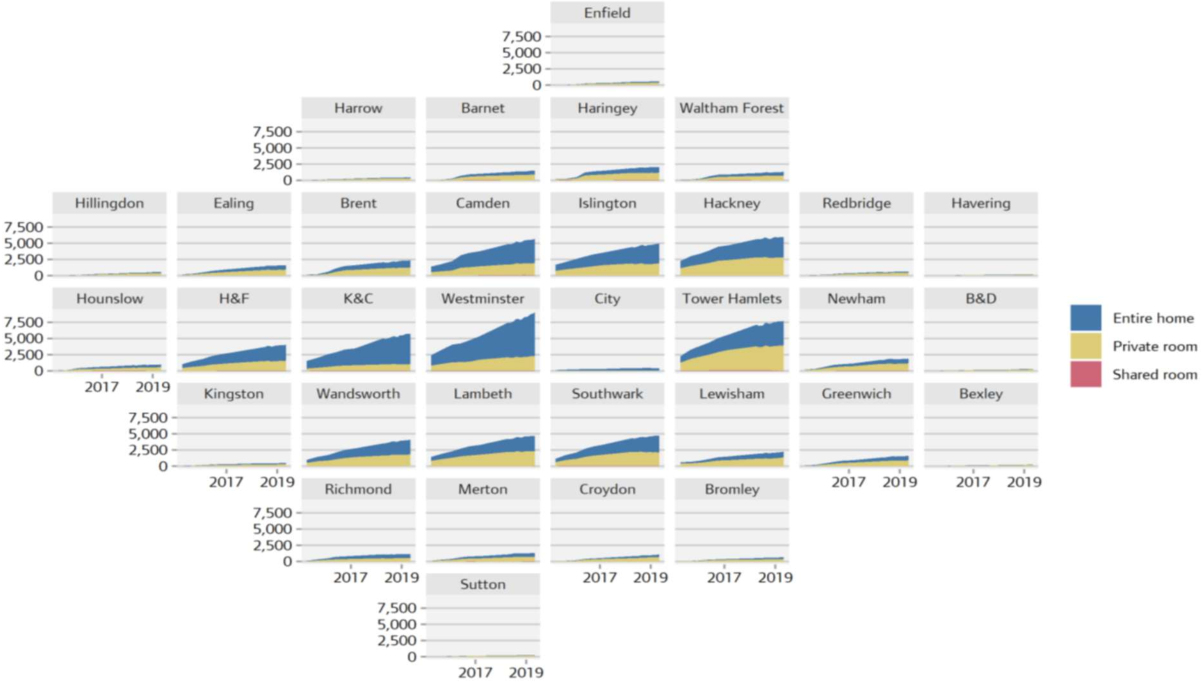
4 https://www.london.gov.uk/sites/default/files/housing_research_note_4-_short-term_and_holiday_letting_in_london.pdf

Chart 2.06b Number of Airbnb listings in London boroughs, April 2015 to May 2019



Hosts with multiple listings primarily have their properties located in Inner London boroughs. Southwark had over 1,000 listings linked to hosts with multiple properties.

The GLA spoke with enforcement officers from London boroughs where the number of short-term lettings is greatest – including Southwark.

Table 2.06b Enforcement in the 5 boroughs 2015-2019

	Borough Planning Contravention Notices served	Enforcement Notices served	Successful prosecutions
Camden	21	9	0
Kensington and Chelsea	66	15	0
Southwark	0	42	0
Tower Hamlets	52	23	0
Westminster	462	24	0

An enforcement notice cannot be served until the local authority is sure there is a breach of planning control, which can be difficult to evidence.

Table 2.06d Total number of short-term rental properties listed in each borough at snapshots between 2015 and 2019

Borough	2015 (Apr)	2016 (Feb)	2017 (Mar)	2018 (May)	2019 (May)
Barking and Dagenham	7	38	142	177	315
Barnet	65	285	1012	1283	1534
Bexley	5	55	115	185	242
Brent	146	585	1609	2027	2375
Bromley	36	171	391	521	651
Camden	1400	2241	3761	4815	5685
City of London	120	231	306	414	436
Croydon	63	206	553	813	1067
Ealing	192	509	1003	1389	1599
Enfield	43	116	301	485	587
Greenwich	116	452	917	1322	1591
Hackney	2225	3440	4688	5602	5950
Hammersmith and Fulham	1048	1862	2806	3591	4043
Haringey	222	507	1493	1868	2077
Harrow	15	152	266	391	451
Havering	0	15	99	144	219
Hillingdon	29	87	277	422	586
Hounslow	70	429	647	840	998
Islington	1695	2592	3583	4349	4948
Kensington and Chelsea	1552	2562	3476	4919	5723
Kingston upon Thames	38	187	316	440	526
Lambeth	1428	2299	3276	4175	4678
Lewisham	615	864	1502	1934	2246
Merton	113	402	820	1114	1326
Newham	198	655	1151	1671	1889
Redbridge	30	151	383	520	646
Richmond upon Thames	100	489	872	1048	1147
Southwark	1151	2123	3359	4256	4751
Sutton	0	53	147	193	259
Tower Hamlets	2237	3916	5613	6947	7752
Waltham Forest	79	286	911	1109	1326
Wandsworth	977	1702	2748	3535	4082
Westminster	2421	4053	5361	7387	9062
Total	18,436	33,715	53,904	69,886	80,767

2.07 Housing for older people

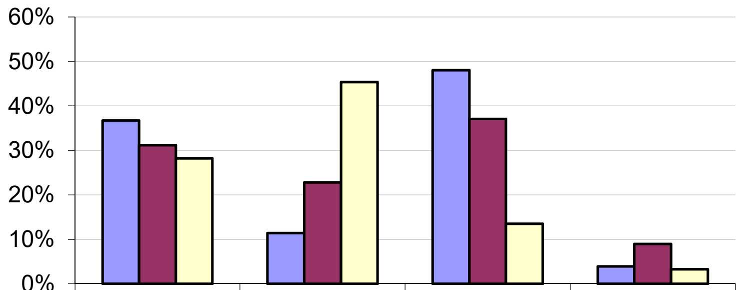
There are approximately 1,310 sheltered housing units in Southwark. There are 620 Southwark Council units and 690 RSL and Alms House units, including Darwin Court (for over 50's). Three of the schemes are extra care schemes. Lew Evans, a 38 unit council owned scheme, was converted from a sheltered housing scheme in 2009. There is also a 54 unit scheme called Lime Tree House which is a purpose built extra care scheme with the extra care managed by Allied Healthcare and Hyde providing the housing management. The newest scheme is Tayo Situ House which will be a 94 extra care units once both phase are complete.

There are also 71 flats runs by Trusts, charities, alms-houses that provide enhanced sheltered housing with on-site staff and enhanced support. These include a specialist scheme for older drinkers/ex rough sleepers called Kimpton Court, and also one for older people who lack independent living skills called Hilltops House.

2.08 Private sector stock breakdown

In the private sector, a large proportion of the housing stock is made up of purpose built flats, although there are also a substantial number of converted flats. Of the houses, most are terraced and there is only a small proportion of detached/semi-detached housing. As the chart below demonstrates, the situation in Southwark's private sector is quite different to London and England for all tenures.

Chart 2.08a Type of dwellings in Southwark, London and England



	Terraced	Semi-detached/detached	Purpose-built flat	Non Residential + flat
Southwark 2008 (private sector tenures)	36.70%	11.40%	48.00%	3.90%
London 2001 (all tenures)	31.20%	22.80%	37.10%	9.00%
England 2006 (all tenures)	28.20%	45.40%	13.50%	3.30%

Source: Southwark Private Sector House Condition Survey 2008
English House Condition Survey 2006

43% of dwellings in Southwark were constructed pre-1919, 14% in 1919 to 1964, and 43% after 1964. There are high rates of pre-1919 stock in the private rented and owner occupier sectors at 47%. Older properties tend to be in greater disrepair and be less energy efficient, requiring more investment.[5] In comparison: 25% of dwellings across England were constructed pre -1919; 34% between1919-1964 and 41% after 1964.[6]

2.09 Empty homes in all tenures

There will always be a proportion of properties in all tenures that are vacant as people move and/or properties are refurbished. However all vacant property is stock that could be providing a home so this needs to be kept to a minimum.

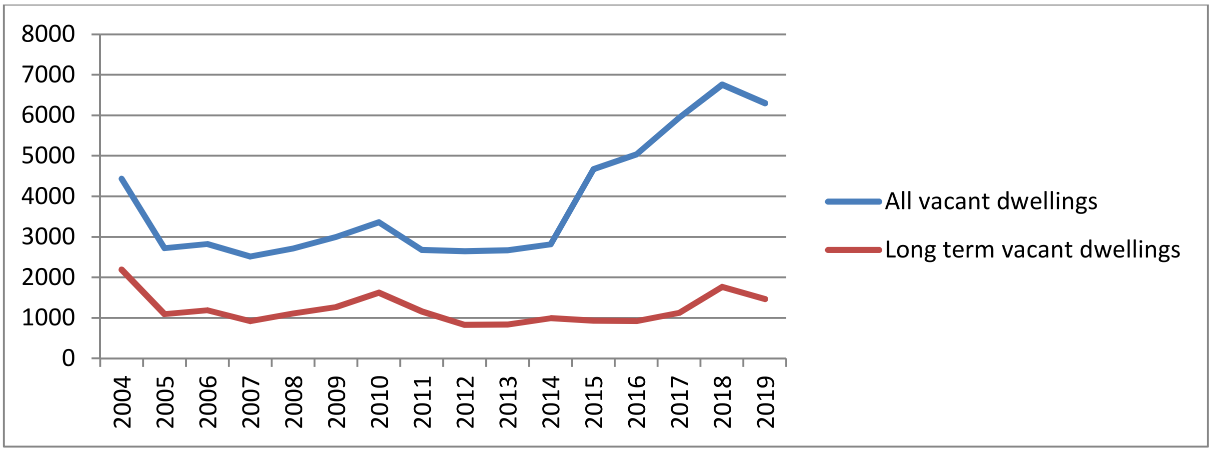
In April 2020 there were a total of 1,044 vacant Southwark Council properties in Southwark. Of these only 13 were vacant and available for lettings. The other units were vacant for reasons such as being involved in regeneration schemes.

In the housing association sector, according to the SDR 2019 for large RPs for general needs self-contained, 1.3% of the stock was vacant. 0.9% of the stock was not available for letting.

In the private sector (including housing associations) 3.3% of properties were vacant in 2008. It was estimated that around 20% were for sale and 34% were being modernised.[7]

Looking at council tax data on the GLA London Datastore in 2019, Southwark had the highest number of vacant properties of all London boroughs at 6,303, of which 1,469 were long term vacant properties. Long-term empty homes are those dwellings which have been unoccupied and substantially unfurnished for over six months and, at local authority discretion, can be subject to a discount of between 0% and 50%. The total vacant figure increased between 2014 and 2018 but fell slightly in 2019.

Chart 2.09a Council tax vacant homes data



Source: https://data.london.gov.uk/dataset/vacant-dwellings

[5] PSHCS, 2008
[6] English Housing Survey 2008-09
[7] PSHCS, 2008

2.10 Houses in multiple occupation

A house in multiple occupation (HMO) may be defined briefly as one that is "occupied by persons who do not form a single household." (The strict definition is considerably longer). Typically this would be a residential dwelling house converted into bedsits, flats or private rooms with common parts such as entrances and exits, bathroom and toilet, kitchen and storerooms, etc. The council estimated that there were 5,020 HMOs in Southwark in April 2020.

HMOs have some of the poorest housing conditions of any tenure. Analysis shows that 4,342 of 5,031 (86%) HMOs in Southwark are predicted to have serious hazards (Category 1 HHSRS). HMOs are generally at higher risk of fire, disrepair and overcrowding.

2.11 Stock Condition

Stock condition - Housing health and safety rating system

The Housing Health and Safety Rating System (HHSRS) became operational in April 2006. The rating system does not talk in terms of premises being fit or unfit but instead enables the surveyor to assess a range of hazards, the likelihood of that hazard occurring in the next twelve months and the class of harm arising from that hazard. This equates to a numerical score, which is banded A - J. Hazards that fall in hazard bands A, B and C are category 1 hazards. The remainder are category 2 hazards. The Housing Act 2004 places a statutory duty upon local authorities to take action to seek to remedy Category 1 hazards where it finds them. Councils have discretionary powers to tackle hazards from D - J.

The HHSRS assessment is based on the risk to the potential occupant who is most vulnerable to that hazard. For example, stairs constitute a greater risk to the elderly, so for assessing hazards relating to stairs they are considered the most vulnerable.
The very young as well as the elderly are susceptible to low temperatures. A dwelling that is safe for those most vulnerable to a hazard is safe for all.

Overall, across the private sector and housing association stock in Southwark, there were approximately 28,700 dwellings with a category 1 hazard, about 37.4% of private sector homes.

Table 2.11a Proportion of hazards by area

Area	Owners	PRS	HA	All
NE *	27.0%	20.7%	16.1%	22.8%
NW	38.1%	42.0%	49.6%	42.9%
SE	46.7%	48.7%	23.0%	42.2%
SW	41.7%	55.8%	35.7%	44.7%
Southwark	37.8%	42.1%	30.5%	37.4%

*NE- indicates North east area of Southwark
Source: PSHCS, 2008

The table above shows that private rented properties in the south west of the borough are most likely to have a category 1 hazard (55.8%). Those living in housing association properties are least likely to have a category 1 hazard (30.5%).

Table 2.11b Categories of hazards in Southwark by the severity of the hazard

Type of hazard	A	B	C	D	E	F	G	H	I	J	All
Damp and mould growth	0.0	3.8	0.0	1.4	7.1	12.7	9.1	33.7	25.7	6.4	100.0
Excess cold	2.2	3.9	28.9	41.3	18.6	5.0	0.0	0.0	0.0	0.0	100.0
Carbon monoxide etc. *	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.3	0.0	95.7	100.0
Volatile organic compounds *	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	100.	100.0
Crowding and space *	10.8	2.3	4.8	0.0	20.9	8.9	0.0	52.3	0.0	0.0	100.0
Entry by intruders *	0.0	0.0	0.0	1.9	47.7	50.4	0.0	0.0	0.0	0.0	100.0
Noise *	0.0	0.0	0.0	0.0	0.0	0.0	0.0	25.6	23.3	51.2	100.0
Domestic hygiene, pests etc. *	0.0	0.0	13.3	0.0	0.0	0.0	0.0	0.0	0.0	86.7	100.0
Food safety *	0.0	0.0	0.0	0.0	0.0	0.0	0.0	35.5	64.5	0.0	100.0
Personal hygiene, sanitation etc. *	5.2	0.0	3.7	0.0	2.1	0.0	5.2	0.0	11.8	72.1	100.0
Falls on the level *	0.0	0.0	9.9	14.0	73.7	0.0	2.4	0.0	0.0	0.0	100.0
Falls associated with stairs etc. *	0.0	1.5	34.3	3.3	17.6	43.2	0.0	0.0	0.0	0.0	100.0
Falls between levels *	0.0	0.0	1.4	0.0	9.7	20.7	27.7	7.5	4.1	28.9	100.0
Electrical hazards) *	0.0	0.0	4.0	0.0	0.0	0.0	17.7	7.6	0.0	70.7	100.0
Fire	0.0	0.0	0.0	31.2	3.5	6.4	9.9	49.1	0.0	0.0	100.0
Flames, hot surfaces etc. *	0.0	0.0	0.0	0.0	14.5	0.0	59.5	26.0	0.0	0.0	100.0
Collision and entrapment *	0.0	0.0	0.0	0.0	0.0	0.0	50.0	50.0	0.0	0.0	100.0
Structural collapse, falling etc*	0.0	0.0	0.0	0.0	0.0	7.8	0.0	3.9	0.0	88.3	100.0
All	1.8	3.0	21.9	32.3	18.4	7.9	2.4	6.0	1.6	4.4	100.0

Source: Private sector house condition survey 2008

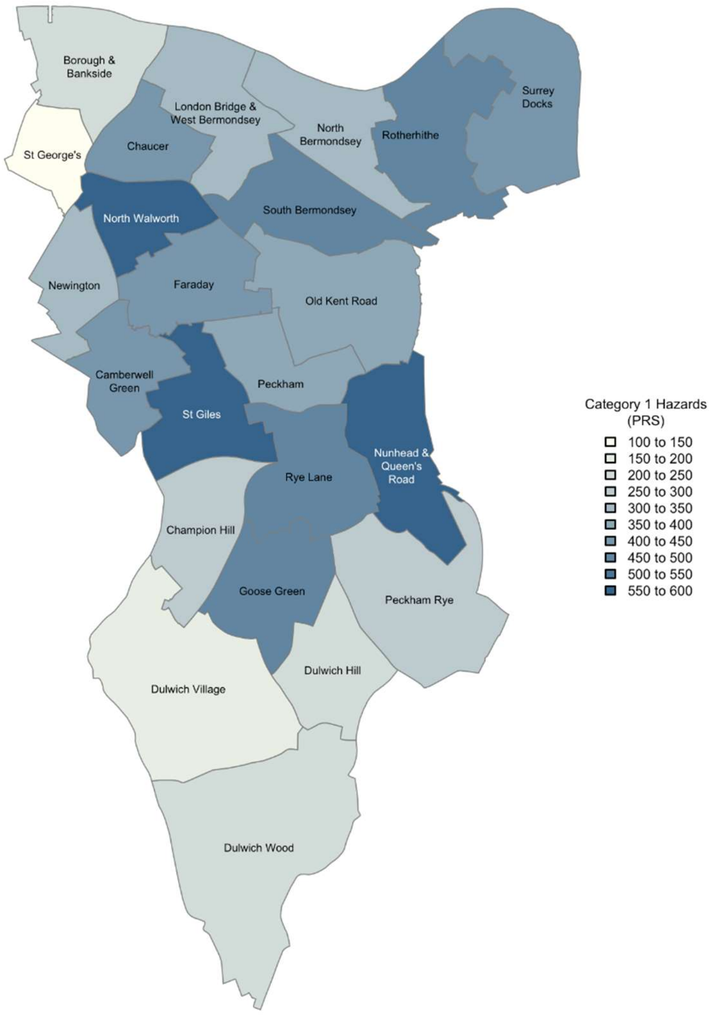
This table does not just relate to the number of private sector households with hazards but is more useful as it describes the frequency of the hazard occurring in a private sector dwelling in Southwark and the risk that hazard poses to the occupant. The higher the banding, the greater the risk. The presence of a hazard, of itself, does not say too much about the condition of a dwelling. It is the severity of the hazard that is important. Thus, the most prevalent hazards are excess cold, followed by fire hazards, damp and the various falls. 26.7% of all hazards are hazard band A, B or C (that is category 1 hazards).

A more recent study was conducted in 2019 which focused more primarily on the private rented sector. This made predictions using available data rather than individual property inspections. This found:

- Poor housing conditions are prevalent in the PRS. 8,497 PRS properties are predicted to have at least 1 serious hazard (Category 1, HHSRS)
- 27% of PRS properties in Southwark have an E, F, and G rating. 5.5% of PRS properties have an F and G EPC rating

The study estimated that Category 1 hazards in the PRS are distributed across the whole borough. Concentrations of properties with serious hazards can be found in the central and northern wards.

Map 2.11c. Distribution of PRS properties with category 1 hazards



Source: London Borough of Southwark Private Rented Sector: Housing Stock Condition and Stressors Report - December 2019 - Ti 2019, map by Metastreet.

Stock condition - Decent Homes

To meet the decent homes standard a home must meet the statutory minimum standard for housing (i.e. not have a category 1 hazard), and be in a reasonable state of repair, and have reasonably modern facilities and services, and provide a reasonable degree of thermal comfort.

Council stock – At the 31st March 2020, 1,567 council homes had been made decent during the year. 1,541 properties were non decent which represented about 4% of the stock. As key building components/elements of council dwellings reach the end of their useful lives more properties will be considered to be in poor condition, and because of this there are a number of newly arising cases of non-decent dwellings at the beginning of each financial year. Therefore on the 1st April 2020 there were about 3,137 properties classed as non-decent, an increase of about 1,600 properties.

Housing association stock – According to the SDR 2019 of the 17,282 total low cost housing association rental stock owned, 128 failed the decent homes standard, 0.7% of the stock.

Private Sector – On the basis of the 2008 private sector house condition survey, 35% of housing association dwellings in Southwark were also non-decent, compared to 29% nationally. 47% of owner occupier and private rented homes are non- decent compared to national rate of 38%. The principal reasons for not meeting the standard are: presence of Category 1 hazard (found in 85% of all non-decent dwellings), failure to provide a reasonable degree of thermal comfort and/ or not in a reasonable state of repair. The majority of non-decent dwellings are in the pre-1919 age band.

The 2019 PRS Housing condition report predicted that 8,497 PRS properties are predicted to have at least 1 serious hazard (Category 1, HHSRS). This equates to 20% (of 42,964) of all PRS dwellings.

Vulnerable households are defined as those private sector households (excluding housing associations) in receipt of at least one of the principal means tested or disability related benefits. In Southwark in 2008 there were about 8,000 dwellings occupied by a vulnerable household representing 13.2% of households in the private sector (excluding housing associations). 19.6% of private renter households were vulnerable compared to 9.6% of owner occupiers. Less than half, 44%, of vulnerable private sector households in Southwark lived in decent homes.

Table 2.010c Non-decent homes and dwelling characteristics in the private sector

	Owners	PRS	HA	Owners and PRS only
Southwark	46.3%	48.0%	34.7%	46.9%
EHCS 2006*	35.4%	49.7%	28.7%	38.0%

Sources: Private sector house condition survey 2008 and * English House Condition Survey 2006

2.12 Repair costs in the private sector in 2008

2008 was the last full survey of housing conditions in the private sector due to the high cost of commissioning this research. The key findings were:

- In the private sector £98 million was needed for urgent repair (required immediately), rising to £126 million for all general repair (required in 0-5 years), £322 million for comprehensive repair (required in 0-10 years) and £1.6 billion for all repair and renovation costs over next thirty years.[8] The total cost of remedying all Category 1 hazards was in the region of £64.1 million, with the vast majority of costs associated with remedying excess cold hazards.

[8] There is no direct correlation between the costs given for these repairs categories and Category 1 type repairs as a different methodology was used in this part of the analysis.

- Homeowners had significant levels of equity in their homes, with 1 in 3 having potential equity in excess of £300,000.
- Over 80% of owner occupiers would not have been willing to use equity to pay for repairs to their home. Only 15% confirmed that they would have been prepared to use their equity to fund major repairs e.g. replacing defective windows, rewiring or roof renewal, etc.

2.13 Disabled facilities grants (DFG) data

Between 2014-15 and 2019-20 there was a substantial increase in spending on DFG funding.

Table 2.13a Value of Disabled Facilities Grants over the last 6 years

Year	Value
2019-20	£1,438,398
2018-19	£1,377,165
2017-18	£1,263,268
2016-17	£1,149,371
2015-16	£614,000
2014-15	£515,717

Source: Internal data

Table 2.13b Number and tenure of Disabled Facilities Grants completed

Year	Owner Occupier	Housing Association	Privet Rented	Total
2019-20	47	27	1	75
2018-19	50	52	3	105
2017-18	50	23	8	81
2016-17	44	30	5	79
2015-16	60	46	5	111
2014-15	71	39	9	119

Source: Internal data

3.0 THE HOUSING MARKET AND COST OF HOUSING

Most data in this section is from the Housing Market Trends Bulletins produced by Southwark Council. These contain information on house prices and rents down to ward/postcode level. These bulletins are regularly published on the Southwark Council website at www.southwark.gov.uk/housingstrategy

3.01 Owner occupation costs

According to Hometrack the overall average price in Southwark in June 2020 was £616,292 and the lower quartile was £390,000. For a two bed flat the average was £519,727 and the lower quartile was £400,000.

Table 3.01a Average and lower quartile prices in South East London and Lambeth by housing type, June 2020 as downloaded from Hometrack in August 2020.

	Area name	Overall	Detached	Semi Detached	Terraced	Flat	M^2
Median	Bexley	387,924	638,399	455,841	351,601	228,805	4,016
	Bromley	539,434	946,222	570,276	466,202	329,239	4,765
	Greenwich	454,410	1,068,201	561,285	501,147	348,182	4,908
	Lambeth	615,820	1,277,205	1,081,815	906,270	481,570	6,914
	Lewisham	485,757	1,100,177	716,039	597,643	362,913	5,543
	Southwark	616,292	1,514,375	1,116,495	896,095	478,717	7,068
Lower quartile	Bexley	295,000	485,000	390,000	314,000	192,000	3,458
	Bromley	350,000	650,000	450,000	370,000	270,000	4,032
	Greenwich	300,000	550,000	415,000	350,000	250,000	3,836
	Lambeth	400,000	805,000	663,500	590,000	375,000	5,619
	Lewisham	325,000	720,000	500,000	450,000	290,000	4,569
	Southwark	390,000	850,000	700,000	690,000	355,000	5,755

Source: Hometrack's Real Demand system

Table 3.01b Average and lower quartile prices in south east London and Lambeth by housing type and size, June 2020 as downloaded from Hometrack in August 2020.

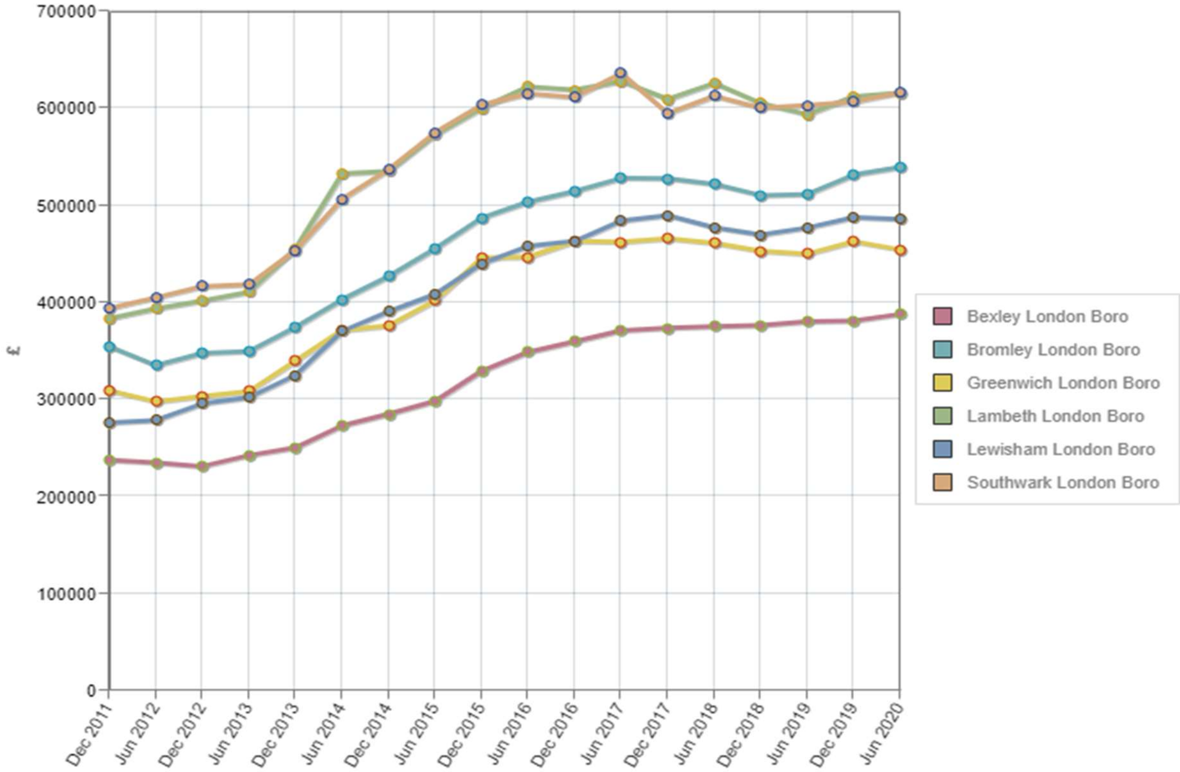
	Area	1 bed flat	2 bed flat	2 bed house	3 bed house	4 bed house
Median	Bexley	199,328	248,340	341,463	408,367	517,383
	Bromley	271,294	348,843	406,823	515,736	728,214
	Greenwich	287,506	361,551	392,764	489,457	747,088
	Lambeth	392,864	502,061	660,891	730,030	996,026
	Lewisham	305,656	380,719	456,470	572,399	764,188
	Southwark	383,732	519,727	650,791	817,087	1,033,079
Lower quartile	Bexley	170,000	228,566	300,000	350,000	430,000
	Bromley	237,250	297,000	335,125	420,000	555,000
	Greenwich	220,000	265,000	320,000	383,438	497,500

	Lambeth	320,000	400,000	530,000	525,000	750,000
	Lewisham	250,000	320,000	345,000	450,000	584,500
	Southwark	300,000	400,000	551,250	669,250	826,000

Source: Hometrack's Real Demand system

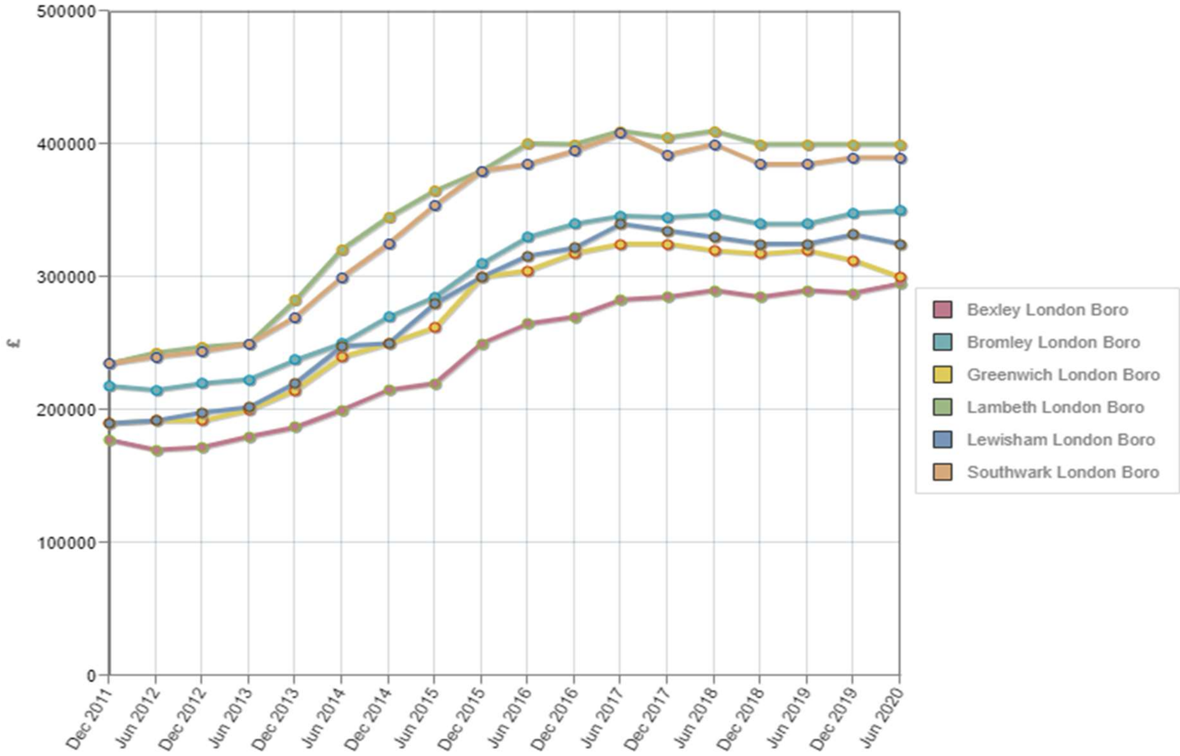
The north of the Southwark borough by London Bridge and the South around Dulwich are the most expensive areas (SE1 and SE11). The least expensive areas in Southwark are the wards of Faraday, Livesey and South Bermondsey. These areas form a belt across the north central part of the borough. The following charts show that house prices across the sub-region have followed a similar trend where they have risen and fallen at similar times. It also shows that Southwark has the highest house prices in the sub-region and similar prices to Lambeth.

Chart 3.01c Average prices in South East London and Lambeth, Dec 2011 – June 2020



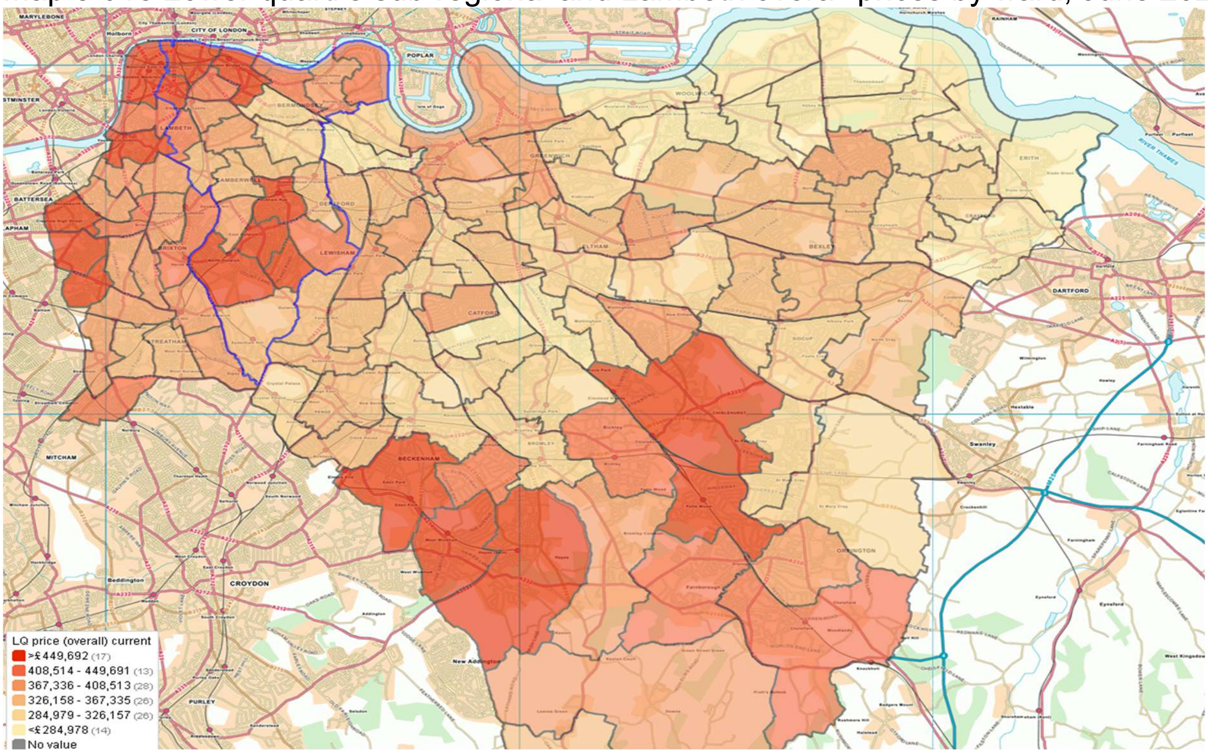
Source: Hometrack's Real Demand system

Chart 3.01d Lower Quartile prices in South East London and Lambeth, Dec 2011 – June 2020



Source: Hometrack's Real Demand system

Map 3.01e Lower quartile sub-regional and Lambeth overall prices by ward, June 2020

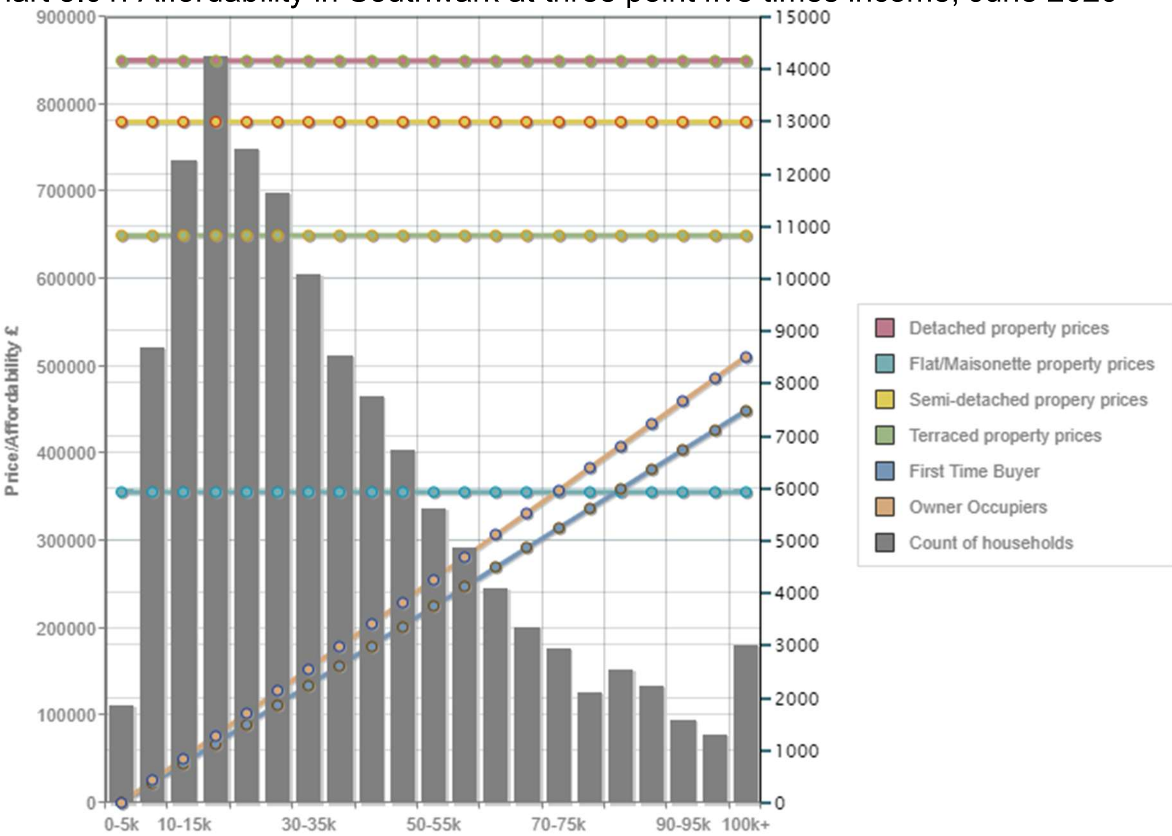


Source: Hometrack's Real Demand system

House Price Affordability

The following chart shows the number of households in different household income bands in the area (bars) compared to the lower quartile price for different property types in the same area (horizontal lines). The diagonal lines rising from left to right show the value of property that can be afforded at different income multiples by a first time buyer and former owner occupier. The affordability calculations are based on a multiple of the average household income adjusted by the average loan to value for the different types of buyer (3.5 times income used here). The house price data is based on data from the Hometrack Automated Valuation Model and the incomes data is supplied by CACI.

Chart 3.01f Affordability in Southwark at three point five times income, June 2020



Source: Hometrack's Real Demand system

According to Hometrack's Real Demand system in June 2020, the house price to earnings ratio in Southwark was 14.4:1 based on data from the latest Annual Survey of Hours and Earnings and sales and valuations over the last 12 months. The London house price to earnings was 13.5:1. Earnings data relates to a single person in full time employment

The lower quartile house price to earnings ratio in Southwark was 15:1. The regional house price to earnings was 14.2:1.

The majority of households have more than one earner. Affordability in Southwark based on household disposable incomes was 16:1, compared to a regional ratio of 12.2:1. The lower quartile house price to income ratio in Southwark was 21:1.

If the average cost of a 2 bed flat is £519,727, assuming a 90% mortgage, and therefore a deposit of £52k, a 3% mortgage interest rate and a 25 year repayment, the monthly mortgage payments would be £2,218, or about £511 a week.

The cost of renting an average 2 bed property in Southwark was £426 a week.

Table 3.01g Percentage of households priced out of the market in Southwark in June 2020

	Percentage of households priced out of market at		
	3* income	**3.5* income**	**4* income**
First time buyers (FTB) households - Flats	96.61%	91.63%	87.68%
FTB households - Terraced houses	100.00%	100.00%	100.00%
FTB households - Semi-detached houses	100.00%	100.00%	100.00%
FTB households - Detached houses	100.00%	100.00%	100.00%
Owner occupier - Flats	93.62%	87.68%	85.08%
Owner occupier - Terraced houses	100.00%	100.00%	100.00%
Owner occupier - Semi-detached houses	100.00%	100.00%	100.00%
Owner occupier - Detached houses	100.00%	100.00%	100.00%

Source: Hometrack’s Real Demand system, June 2020

3.02 Private renting costs

The cost of private renting in London is much higher than renting anywhere in the country. Demand for rented property has shown a rise across Britain as house prices become increasingly inaccessible.

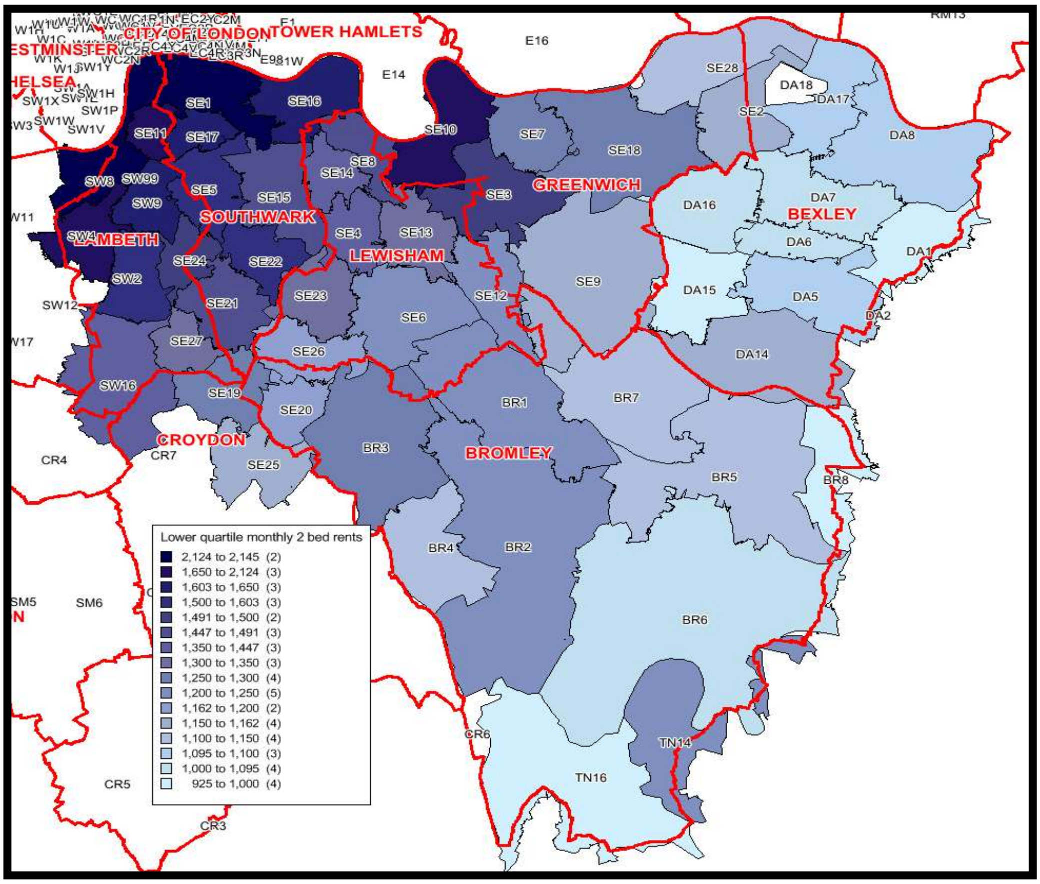
Table 3.02a Advertised monthly private sector rents in Southwark, April 2020, by property size

Size	Lower Quartile	Median	Upper Quartile	Count	Mean
Studio	1050	1322	1733	1523	79
1	1350	1603	1993	1857	621
2	1700	2145	2925	2735	919
3	2015	2383	4000	3614	317
4+	2700	3033	3467	3358	140

Source: Southwark Housing Market Trends Bulletin #66 (based on data downloaded and analysed from zoopla.co.uk)

Southwark generally has the most expensive private property rentals in the whole of the South East London sub-region, particularly for 2 and 3 bedroom properties. Affordability of private housing is therefore a key issue in Southwark.

Map 3.02c Two bed lower quartile monthly rents in South East London, April 2020



Single rooms rents

Single rooms are a very important source of accommodation. This is because often they are the only affordable accommodation for single people, especially young single people.

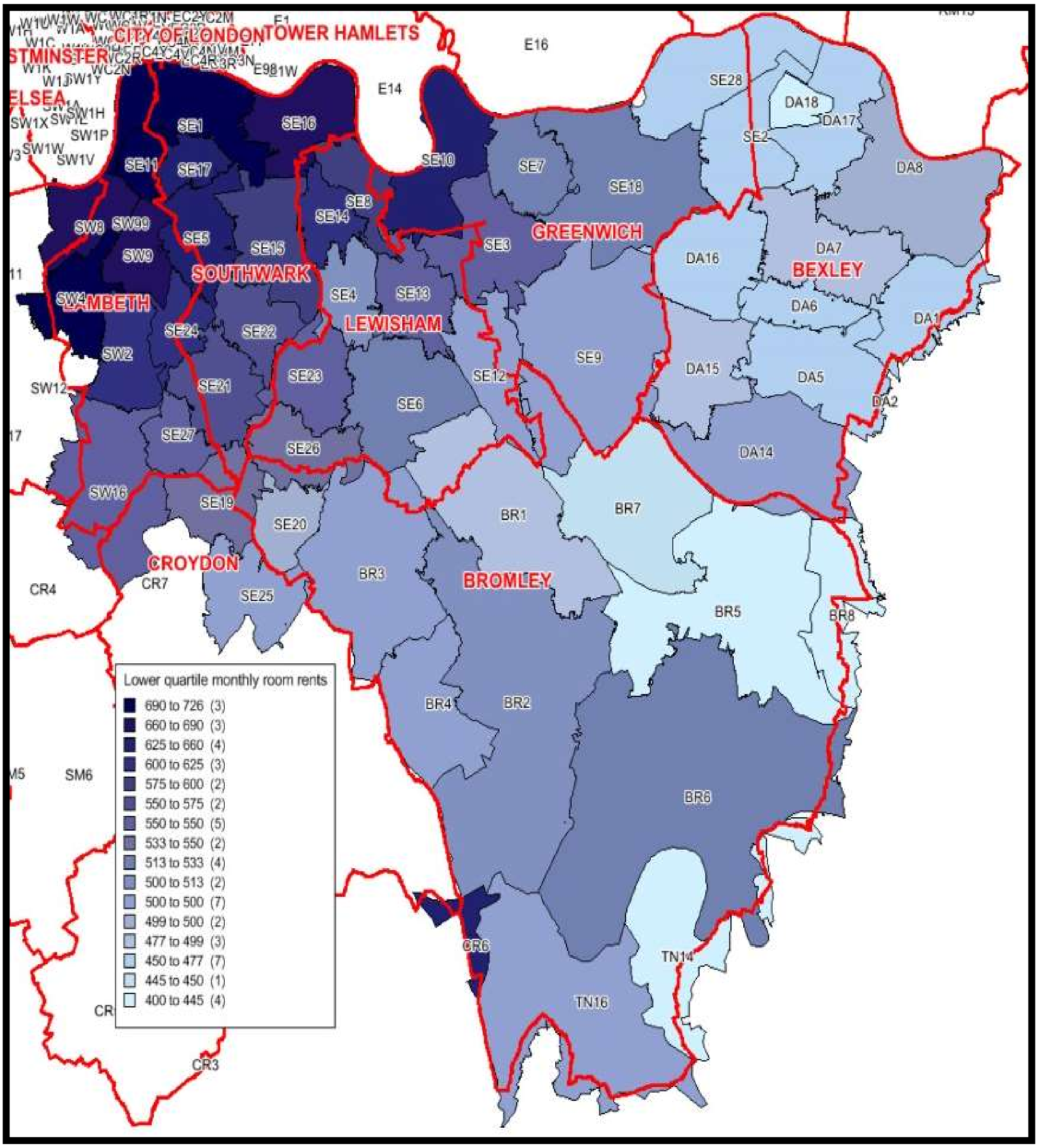
The Local Housing Allowance level for single rooms in Inner SE London in April 2020 was £118.87 per week and for Outer SE London it was £103.56 per week. There is a limited choice for people who need shared accommodation that can be covered solely by housing benefit.

The lower quartile weekly room rent in Southwark in April 2020 was £150 and the median was £173.

Table 3.02d Monthly room rents in South East London, April 2020

Borough/ Postcode	Lower quartile	Median	Upper quartile	Mean	Count
Bexley	466	520	590	537	177
Bromley	500	570	650	585	287
Greenwich	520	613	725	648	593
Lewisham	542	618	700	641	746
Southwark	650	750	870	782	1119

Map 3.02e Monthly lower quartile room rents in South East London, April 2020



Source: Analysed data downloaded from Spareroom.co.uk

3.03 Social housing costs

In 2019/20 the average council rent in Southwark was £98.75 a week.[9] In 2017/18 the average housing association net rent in Southwark was £121.65[10]. The average gross council rent including service charge was £131.24. For housing association affordable rent the gross rent was £194.64.

Table 3.03a General needs (social rent) - Average weekly rent (£ per week) and unit counts by unit size for Southwark - Large PRPs

				£ per week	
Unit Size	**Net**	**Social**	**Service**	**Gross**	**Unit**
	rent	**rent rate**	**charge^**	**rent^**	**count**
Non-self-contained	£78.22	£78.22	£23.69	£101.91	6
Bedsit	£95.30	£92.32	£13.20	£106.78	138
1 Bedroom	£104.06	£104.29	£11.89	£113.70	3,744
2 Bedroom	£120.36	£121.61	£13.60	£131.10	4,383
3 Bedroom	£136.65	£139.90	£13.18	£145.65	3,020
4 Bedroom	£153.23	£156.36	£9.90	£158.93	800
5 Bedroom	£160.45	£166.52	£9.35	£164.25	113
6+ Bedroom	£169.74	£173.96	£3.25	£171.04	10
All self-contained	£121.67	£123.40	£12.73	£131.25	12,208
All stock sizes	**£121.65**	**£123.38**	**£12.73**	**£131.24**	**12,214**
Owned stock. Large PRPs only - unweighted. Excludes Affordable Rent and intermediate rent, but includes other units with an absolute exception for the WRWA 2016. Stock outside England is excluded.					

Source: SDR 2019

Table 3.03b Affordable rent general needs - Average weekly gross rent (£ per week) and unit counts by unit size for Southwark

	£ per week	
Unit Size	**Gross**	**Unit**
	rent	**count**
Non-self-contained	£125.60	4
Bedsit	£159.12	25
1 Bedroom	£172.99	435
2 Bedroom	£217.07	453
3 Bedroom	£196.12	103
4 Bedroom	£211.17	14
5 Bedroom	£0.00	0
6+ Bedroom	£207.05	3
All self-contained	£194.91	1,033
All stock sizes	**£194.64**	**1,037**
Owned stock. All PRPs owning Affordable Rent units - unweighted. Stock outside England is excluded.		

Source: SDR 2019

[9] Table 702 Rents Lettings and Tenancies: Average weekly rents by district
[10] Table 704 Rents: Private Registered Provider (PRP) rents, by district and SDR 2019 data https://www.gov.uk/government/statistical-data-sets/live-tables-on-rents-lettings-and-tenancies

4.0 HOUSING NEED

4.01 Strategic Housing Market Assessment (SHMA)

Cobweb Consulting were commissioned by Southwark Council to update the Southwark section of the 2014 SHMA (Strategic Housing Market Assessment) that was produced for five South East London boroughs. The purpose of the update was to allow for a better understanding of the housing market in Southwark and to help inform the policies for the proposed New Southwark Plan.

The SHMA 2019 is available online at
https://www.southwark.gov.uk/planning-and-building-control/planning-policy-and-transport-policy/development-plan/evidence-base/housing

The SHMA considered various demographic projections and methodologies to calculate the annual estimated need for housing in Southwark. These resulted in a range from a minimum of 2,600, to 2,932 additional units per annum.

The need for affordable housing differs from total housing need. Assessed need is an assessment of the amount of additional housing stock required to cater for future household growth. The affordable housing requirement estimates the total amount of affordable housing required, which could be met in a variety of ways in addition to building more homes.

To assess gross affordable need, estimates were made of the number of households in need at 2019. This backlog need was assessed to be 12,015 households. It was assumed that backlog housing need would be met over a twenty year period, leading to an annual quota of backlog need of 601 households. To this were added the numbers of newly forming households (3,943 per annum) and the number of existing households falling into need (205 per annum).

This indicated a potential annual need for housing of 4,748 households per annum, before taking account of the ability of these households to afford market housing.

It was agreed that no household should be expected to pay more than 33.3% of gross income on housing costs. This was an approach consistent to that taken in the previous SHMA. Household incomes were compared with the threshold entry cost for market housing, to give an estimate of the number of households in need of affordable housing, broken down by bedroom requirements. An estimated 3,513 households per annum could not afford to pay the market entry threshold cost and therefore needed affordable housing.

Four other affordable housing thresholds were also identified:

- 327 households could not even afford these rents (the estimates of incomes include housing benefits) suggesting that the housing benefit system is not helping all households to fully meet their housing costs, and that some low income households will need to spend a higher proportion of their income on housing than assumed.

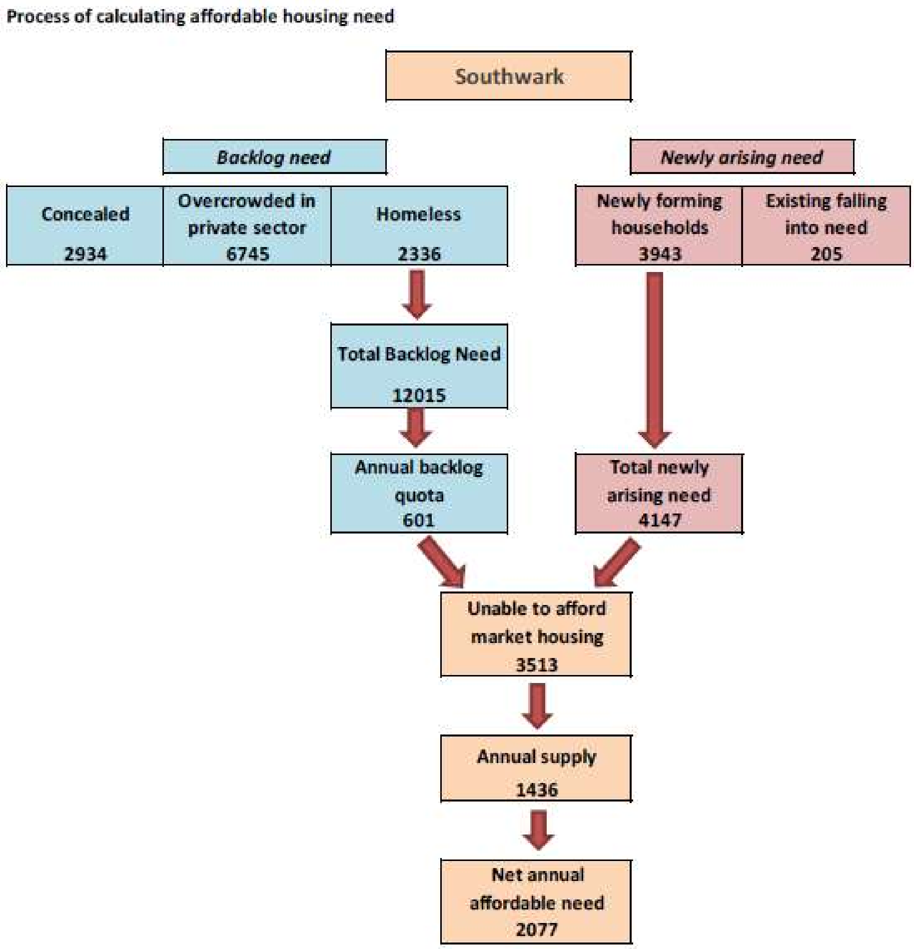
- 1,403 households could afford a social rent, and a rent up to 49% of the lower quartile market threshold rent. We term this group the ‘Social rent target group’.
- 575 more households could afford 50-65% of the lower quartile market threshold rent
- 471 more households could afford 66-79% of the lower quartile market threshold rent. This group is most likely to be appropriate for the current range of intermediate rent products
- 736 more households could afford 80-99% of the lower quartile market threshold rent.

These proportions are not exact but give a rough indication of the breakdown of affordable need. The table below shows the level of need for each type of affordable provision. The table is based on a range of incomes of those in housing need (and an assumption that a household will only find a rent affordable if it is no more than 33.3% gross earnings).

It can be seen that 26% can afford to meet their needs in the open market. At the other end of the scale, 7% cannot even afford a social rent without spending more than 33.3% of earnings. The rest can afford social rents (which range between 21% and 33% of lower quartile market rents depending on bedsize, and rents at higher levels below the full market threshold. We term the group that, at the bottom can just afford social rents, and at the top, 49% the market rent, the ‘social rent target group’.

	In each category		Cumulative	
Affordability	Number	Percent	Number	Percent
Can afford lower quartile market rent	1235	26%	1235	26%
Can afford 80-99% of lower quartile market rent	736	16%	1972	42%
Can afford 66-79% of lower quartile market rent	471	10%	2442	51%
Can afford 50-65% of lower quartile market rent	576	12%	3018	64%
Social rent target group*	1403	30%	4421	93%
Can only afford rent below average social rent level	327	7%	4748	100%

*Can afford current average social rent and up to 49% lower quartile market rent



The full Strategic Housing Market Assessment 2019 is available online at https://www.southwark.gov.uk/planning-and-building-control/planning-policy-and-transport-policy/development-plan/evidence-base/housing

4.02 Housing register

The housing register is an indicator of need but there will be many households who need housing but who do not register as they know they will not be a high enough priority to get a social rented property.

The council keeps a housing register of households who apply for social housing (housing provided by the council or a housing association). Also included in the housing register are existing tenants who want a transfer to a different home. The housing needs of all applicants (including transfer applicants) are assessed and households are put into one of the priority bands for rehousing. Households then bid through a choice-based lettings scheme called Homesearch. The property is allocated to the bidder with the highest priority and then the longest time on the housing register.

At the 1st of April 2020 there were 12,921 households on the housing register. 37% of those on the list are existing tenants wishing to transfer. The greatest demand is for a 1 bedroom property. However, tenants wishing to transfer are most likely to need a 2 bedroom plus property. Applicants wishing to move to a larger property (3 bedroom +) often have to wait much longer for a property to become available. Many of the council-owned family-sized properties in Southwark were bought by tenants through the Right to Buy. While the Council has policies to encourage greater supply of new larger properties these are still in very short supply. These factors have led to an increase in overcrowding in many London boroughs, including Southwark.

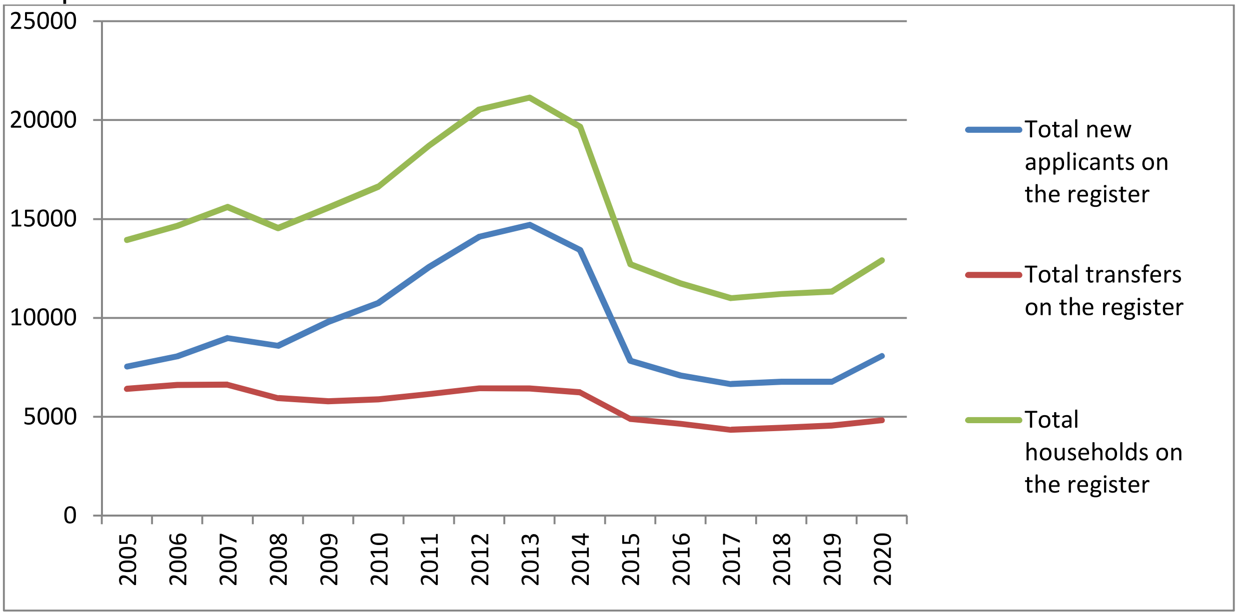
The number of households on the housing register reduced dramatically in 2014/15. This was due to new local qualification criteria to join the housing register and the first review of the housing register in 6 years which removed 10,000 households from the housing register. Some of the reduction was also due to the council's anti-fraud work.

Table 4.02a General housing register in April 2020

Bedroom need	New applicants	Existing tenants (transfers)	Total
One bedroom	4,076	1,342	5,418
Two bedrooms	2,465	1,344	3,809
Three bedrooms	1,127	1,462	2,589
Three bedrooms plus	420	685	1,105
Total	8,088	4,833	12,921

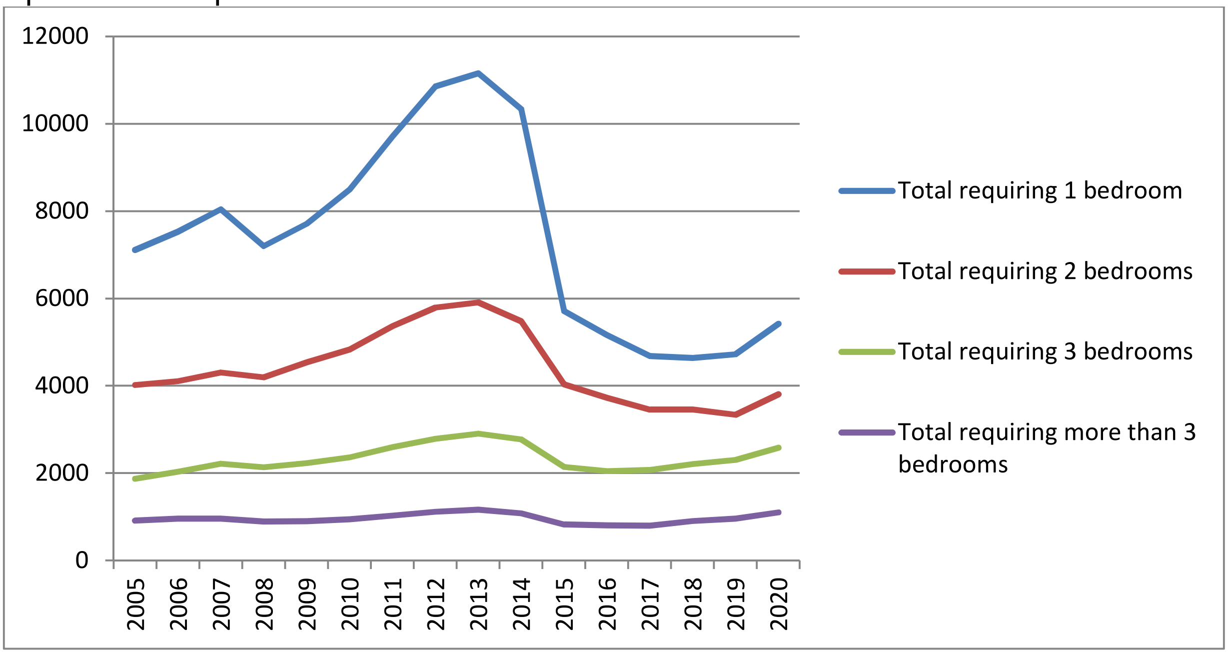
Source: LAHS 2020

Chart 4.02b Southwark's housing register broken down by type of applicant April 2005 to April 2020



Source: Housing Strategy Statistical Appendix, ELASH and LAHS

Chart 4.02c Southwark's housing register broken down by size of property required, April 2008 to April 2018



Source: Housing Strategy Statistical Appendix, ELASH and LAHS

4.03 Homelessness

Statutory homelessness in Southwark data

Between April 2018 and March 2019 Southwark council saw 2,953 homeless approaches. This represents a 13.3% increase from the number received in the same period in 2017 – 2018 and a 51.5% increase from 2014/2015.

Table 4.03a Homeless approaches in 2018/19

	2014/2015	**2015/2016**	**2016/2017**	**2017/2018**	**2018/2019**	**Cumulative**
Homeless Approaches	1822	1992	2354	2607	2953	
Percentage Increase	/	9.3%	18.2%	10.7%	13.3%	**51.5%**

Source: Internal records

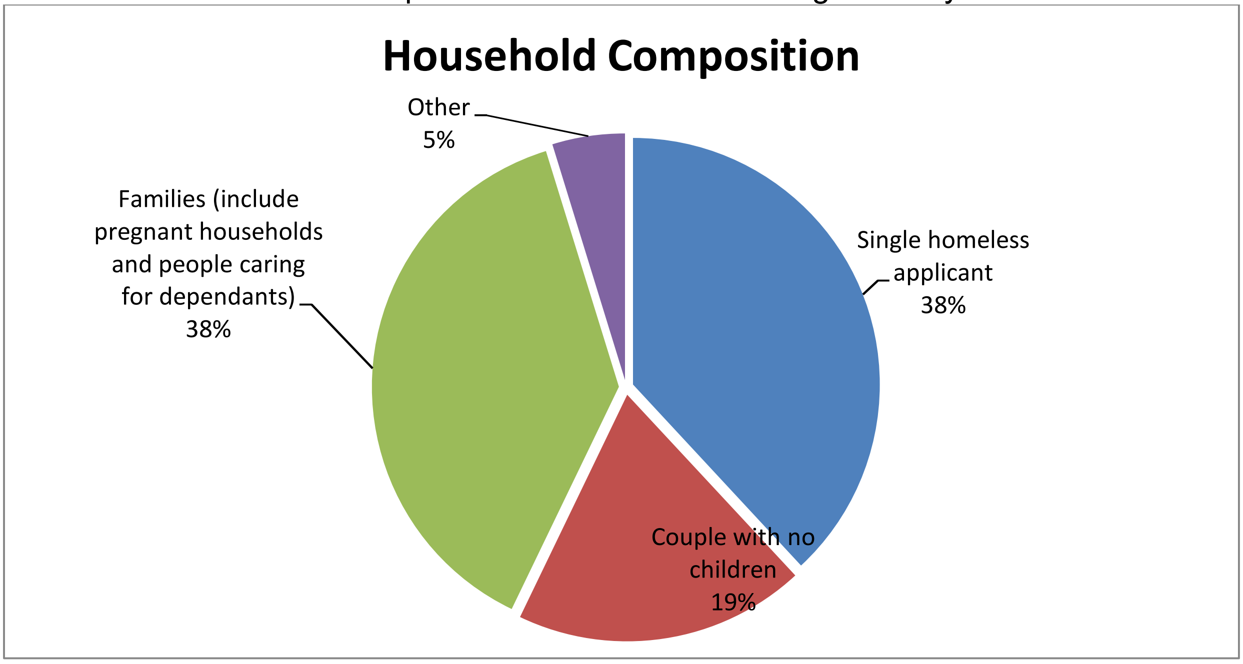
In the last three years Southwark Council Housing Solutions had seen a 20% increase in footfall year on year. Early data for the financial year of 2019 to 2020 showed this continuing.

Since 2010 there has been a significant rise in homelessness caused by the end of private rented sector tenancies and no fault evictions. This is the second largest cause of homelessness in Southwark.

The household composition of those approaching the homeless service is split with 38% families to 57% households without dependants (single applicants and couples approaching without children). The above graph shows this new distribution, the breakdown in 2017/2018 was 60% families to 40% single households or households without dependants, while 5% of applicants defined their household type as ‘other’. Southwark is comparable with the rest of the country, where there has also been a remarkable change in the profile of those approaching services as homeless. Local Authorities have described an increase in single people approaching without a priority need and an increase in singles with mental health problems. [11]

[11] https://www.crisis.org.uk/media/240419/the_homelessness_monitor_england_2019.pdf

Chart 4.04b Household Composition from a customer insight survey 2019



Source: Customer Survey 2019

Initial Assessment of Duties Owed

The following table shows the distribution of duties owed to clients approaching the service in 2018-2019. When the applicant initially approaches, the council will make a judgement of whether they are threatened with homelessness (in which case we owe them a prevention duty), already homeless (in which case we owe them a relief duty) or are not threatened with homelessness within 56 days. The below data is collected when a full homeless application has been taken. The approaches are evenly spread between prevention and relief duties owed, with a small number of cases found not to be homeless within 56 days. In order to maximise the potential for a positive outcome for each case, we are carrying out work to encourage applicants to approach as early as possible, allowing officers to carry out upstream prevention work.

Table 4.03c Duty owed on homeless

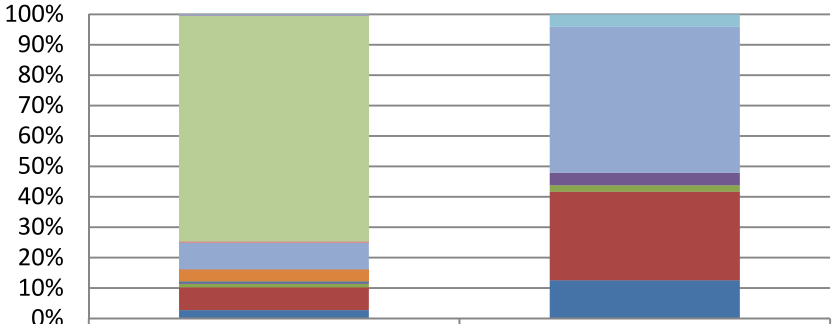
Assessment Outcome 2018/19	Southwark	London	England
Threatened with homelessness – Prevention Duty owed	50%	56%	51%
Already homeless – Relief Duty owed	48%	37%	39%
Not threatened with homelessness within 56 days	2%	7%	10%

Source: H-CLIC records

Homelessness preventions

In the financial year of 2018-2019 Southwark Council accepted a prevention duty towards 1,661 applicants.

Chart4.03e Prevention Activity 2018/19.



	Threatened with homelessness – Prevention Duty owed	Threatened with homelessness due to service of valid Section 21 Notice – Prevention Duty owed
Housing related support to sustain accommodation	2	2
Financial payments used for other purposes (not arrears or to secure new accommodation)	1	0
Discretionary Housing Payment to reduce shortfall	758	0
Financial payments to reduce rent service charge or mortgage arrears	9	0
Negotiation/mediation/advocacy work to prevent eviction/repossession	90	23
Negotiation/mediation work to secure return to family or friend	39	0
Supported housing provided	4	0
Helped to secure accommodation found by applicant, without financial payment	5	2
Helped to secure accommodation found by applicant, with financial payment	12	1
Accommodation secured by local authority or organisation delivering housing options service	77	14
No activity – advice and information provided	28	6

Source: H-CLIC records

The graph above shows any prevention activity that was conducted on cases assessed as owed a prevention duty in 2018-2019. This is then broken down by the category of prevention duty. The use of Discretionary Housing Payment (DHP) can be seen as the most common prevention activity to take place on cases approaching with a ‘prevention duty owed’. Whereas negotiation, mediation and advocacy work to prevent eviction or repossession is the most frequently used activity for cases owed a 'prevention duty due to the service of a valid section 21'.

Table 4.03e Reason Prevention Duty Ended

Reason prevention duty ended	Assessments taken in 2018/19	%
Secured existing accommodation for 6 months	866	81%
Homeless	78	7%
Secured alternative accommodation for 6 months	31	3%
56 days or more expired and no further action	25	2%
Secured alternative accommodation for 12 or more months	24	2%
Contact lost	23	2%
Secured existing accommodation for 12 or more months	16	1%
Withdrew application / applicant deceased	10	1%

Source: H-CLIC records

The table below shows the 10 Local Authorities which reported the most successful prevention outcomes in 2018-2019. Southwark is 5th nationally for successful prevention outcomes, which include securing existing accommodation for 6 or 12 months and securing alternative accommodation for 6 or 12 months.

Table 4.03f Successful Preventions by Borough

No.	Local Authority	Total Successful Preventions 2018/19
1	Leeds	3,070
2	Cornwall	1,066
3	Durham	1,002
4	Kirklees	967
5	**Southwark**	**937**
6	Leicester	795
7	Haringey	699
8	Ealing	660
9	Stockton-on-Tees	611
10	Wiltshire	583

Source: H-CLIC records

The table below illustrates accommodation of applicants when prevention duty comes to an end. When an applicant is placed in temporary accommodation, the appropriate accommodation outcome on HCLIC is 'council tenancy', which explains the high proportion of this accommodation outcome seen below.

Table 4.03g Accommodation Outcome at Prevention End

Applicants accommodation when prevention duty ended	Assessments taken in 2018/19	%
Council tenancy	354	50%
Private rented sector: self-contained	189	27%

Registered Provider tenancy	77	11%
Staying with family	28	4%
Private rented sector: HMO	27	4%
Not known	16	2%
Staying with friends	6	1%
Other	6	1%

Source: H-CLIC records

Relief Duty

In the financial year of 2018-2019 Southwark Council accepted 1,582 relief duties. The table below shows the distribution of activity taken on cases within the relief activity- these activities were not necessarily successful in relieving homelessness.

Table 4.03h Relief Activities

Relief Activity within 2018-19	%
Accommodation secured by local authority or organisation delivering housing options service	46%
No activity	25%
Helped to secure accommodation found by applicant, with financial payment	12%
Supported housing provided	5%
Negotiation/mediation work to secure return to family or friend	5%
Other activity through which accommodation secured	4%
Helped to secure accommodation found by applicant, without financial payment	2%
Sanctuary or other security measures to home	0%
Negotiation/mediation/ enforcement action to secure re-entry with landlord	0%

Source: H-CLIC records

A prevailing reason for the relief duty being brought to an end in Southwark is ’56 days elapsed’, meaning that the case moves to the final duties stage of the application and will be given a full homeless decision. Positive relief outcomes are; ‘secured accommodation for 6 months’ or ‘secured accommodation for 12 months’.

Table 4.03i Reason relief duties ended

Reason relief duty ended	Assessments taken in 2018/19	%
56 days elapsed	343	64%
Secured accommodation for 6 months	**58**	**11%**
Contact lost	41	8%
Withdrew application / applicant deceased	39	7%
Secured accommodation for 12 or more months	**35**	**6%**

Source: H-CLIC records

In terms of successful relief outcomes, Southwark ranks 143rd in the country and 19th within London Boroughs. This could be in part driven by our emphasis on preventative work. Southwark will do all it can to prevent homelessness and exhaust every avenue before moving a client to the relief duty.

The table below shows the four most frequent accommodation outcomes for applicants when the relief duty comes to an end. Both 'private rented sector' and 'staying with family' are positive relief outcomes which result in homelessness being resolved.

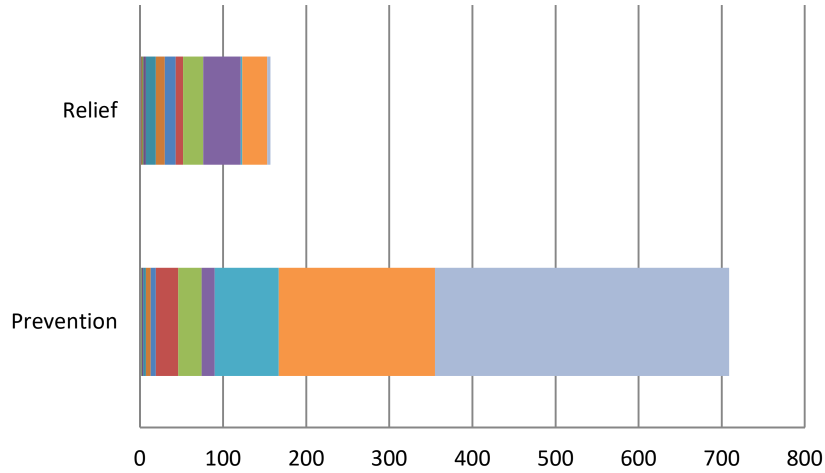
Table 4.03j Accommodation Outcome at Relief End

Applicants accommodation when relief duty ended	%
Not known	29%
Private rented sector: self-contained	19%
Staying with family	15%
Other	8%

Source: H-CLIC records

The graph below compares the outcome of the households' accommodation when the prevention and relief duty have come to an end. There are a higher proportion of applicants placed into temporary accommodation at the end of the prevention duty than the end of relief duty, due partially to officer having a reason to believe the client could be in priority need for housing. Additionally, some final decisions could be being made within the relief duty, which leads to the relief duty ending after the final decision takes effect.

Chart4.03k Applicants accommodation at end of duty



	Prevention	Relief
No fixed abode: rough sleeping	0	1
Refuge	1	1
No fixed abode: not rough sleeping	1	2
Private rented sector: lodging (not with family or friends)	2	3
Social rented supported housing or hostel	3	12
Staying with friends	6	11
Other	6	13
Private rented sector: HMO	27	9
Staying with family	28	24
Not known	16	45
Registered Provider tenancy	77	2
Private rented sector: self-contained	188	30
Council tenancy	354	4

Source: H-CLIC records

Homeless decisions and statutory homelessness

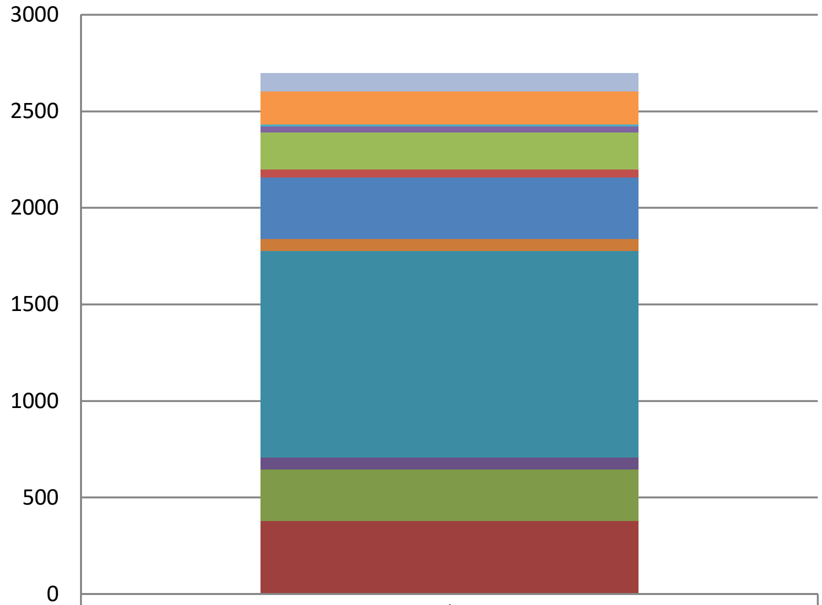
Once the prevention and relief duties have come to a close, the case moves to the decision stage. In 2018-2019 Southwark Council made 2,607 decisions, 867 of which resulted in the main homelessness duty being accepted and 1,740 were not accepted.

One third of homeless decisions made by the Housing Solutions service at Southwark Council in the financial year of 2018 to 2019 were acceptances that full housing duty was owed to the applicant.

The 67% of decisions' not accepted can be broken down into 30% found not to be homeless, 16% found not to fall into a priority need category, 10% of case closure due to loss of contact with client, 3% found intentionally homeless and under 7% due to

other (including not eligible for public funds, referred to another local authority and withdrawal of application by a client).
The chart below sets out the causes of statutory homelessness in Southwark over 2018/19. The most common cause of statutory homelessness (39%) remained that parents, friends or relatives are no longer willing to accommodate the individual or household in question. The second most prevalent reason for homelessness is the ending of a private rented tenancy (24.2%) and the third is an experience of domestic abuse.

Chart4.03I Homeless approach reason in 2018/19

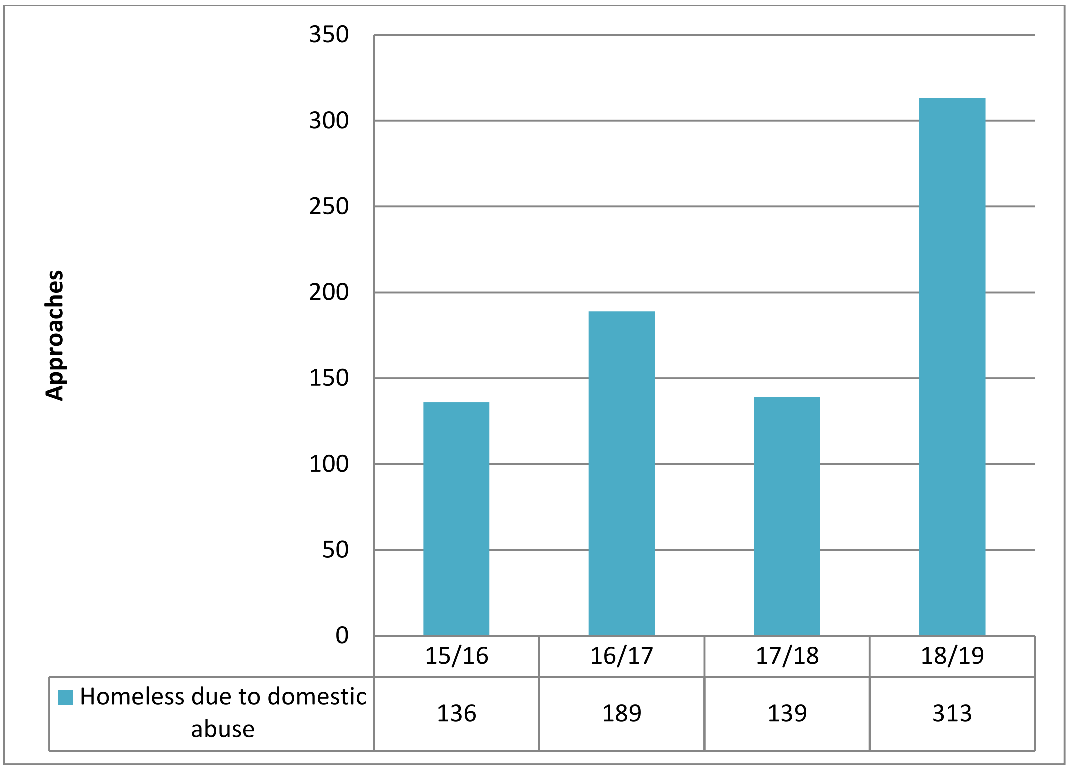


	1
Unreasonable to occupy	86
Other	175
Fire or flood / other emergency	6
Required to leave accommodation provided by Home Office as asylum support	31
Left institution	191
Non-racially motivated / other motivated violence or harassment	38
Domestic abuse	319
Relationship with partner ended (non-violent breakdown)	71
Family or friends no longer willing or able to accommodate	1058
End of social rented tenancy	67
End of private rented tenancy – not assured shorthold tenancy	262
End of private rented tenancy – assured shorthold tenancy	392
Mortgage repossession	2

Source: Internal records

The number of statutory homeless approaches due to domestic abuse in 2018-19 increased by more than 150 cases, compared to the previous year.

Chart 4.03m Number of homeless approaches due to domestic abuse from 2015/16 to 2018/19



Source: Internal records

4.04 Temporary accommodation

Numbers in temporary accommodation have increased by 36% since March 2017. The table below depicts Southwark's homeless customers in temporary accommodation as it has changed in the last three years. There are four main types of temporary accommodation used in Southwark.

Table 4.04a Temporary accommodation numbers

Temporary Accommodation Type	Mar 17	Mar 18	Mar 19
Nightly Paid Accommodation	730	934	1,141
Southwark Hostels	320	333	299
Estate Short Life Accommodation	640	759	732
Private Sector Leased	178	342	394
Total	1,868	2,368	2,539

Source: Internal records

In March 2019, in a government data release Southwark had the 5th highest numbers in temporary accommodation in London, Newham reported the greatest number at 5,048.[12]

In August 2020 Southwark had 3,285 households living in temporary accommodation

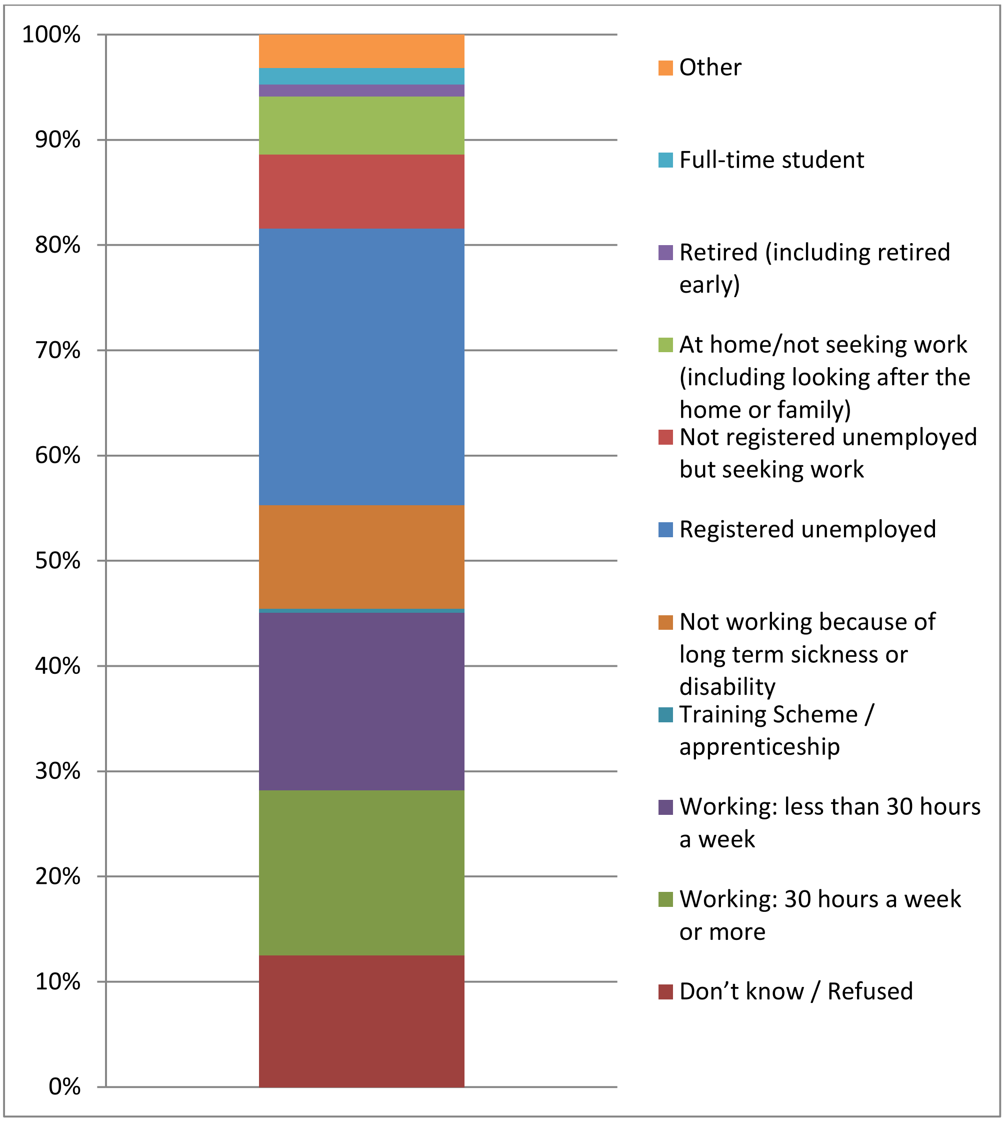
In 2018/19 35% of clients approaching the service had a support need which they disclosed at the initial assessment. 15% of these cases had a history of mental health problems. 15% of applicants approaching reported having a physical ill health or disability.

26% of those approaching as homeless were 'registered unemployed', 17% were recorded as 'working less than 30 hours a week' and 16% were 'working 30 hours or more'. The remaining 41% is made up of applicants who were 'at home/not seeking work', 'not registered unemployed but seeking work', 'not working because of long term sickness or disability' or did not disclose their employment status.

The graph below shows the breakdown of employment status of the main applicant of a homeless household.

12 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/831061/TA_201903.xlsx

Table 4.04b Employment status of main applicant



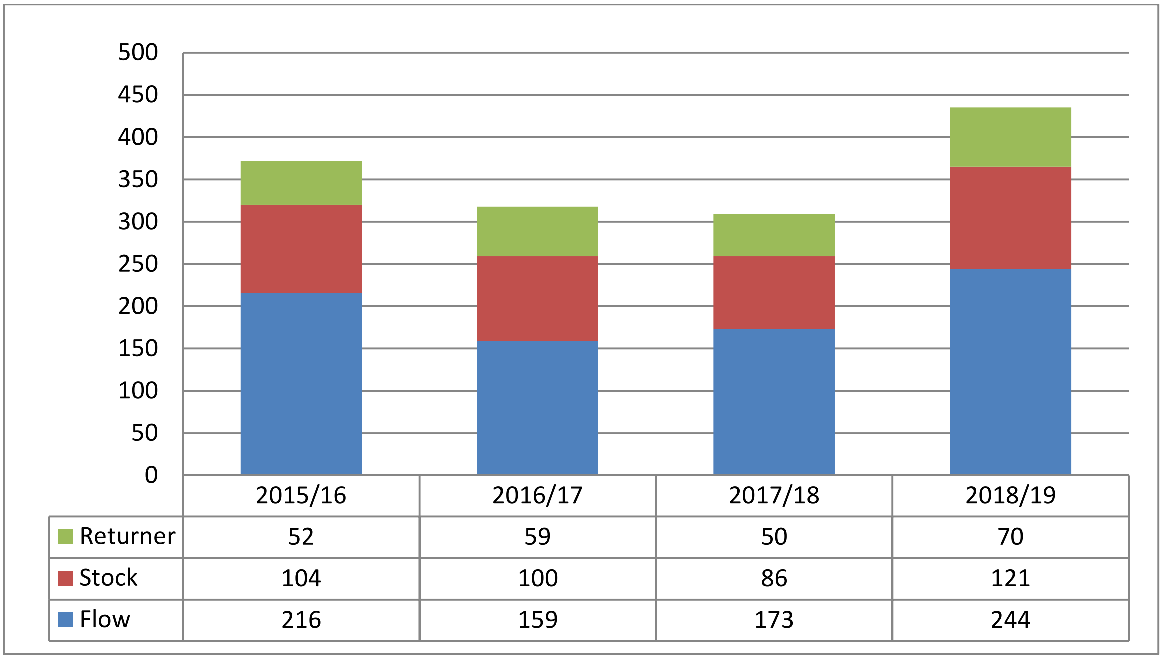
Source: H-CLIC records

4.05 Rough sleeping

After two years of a drop in the number of rough sleepers in Southwark, there was an increase in 2018/19. Rough sleeping was up by 40% since 2017/18.

The rough sleeping count conducted in November 2019 recorded 44 people sleeping rough a reduction from 57 in November 2018.

Chart 4.05a Numbers of rough sleepers in Southwark 2015/16 to 2018/2019



Source: CHAIN reports

The reasons given for leaving settled base as divulged by people seen rough sleeping in Southwark in 2018-2019 are below. The most prevalent reason is 'asked to leave or evicted' and the second is 'relationships'.

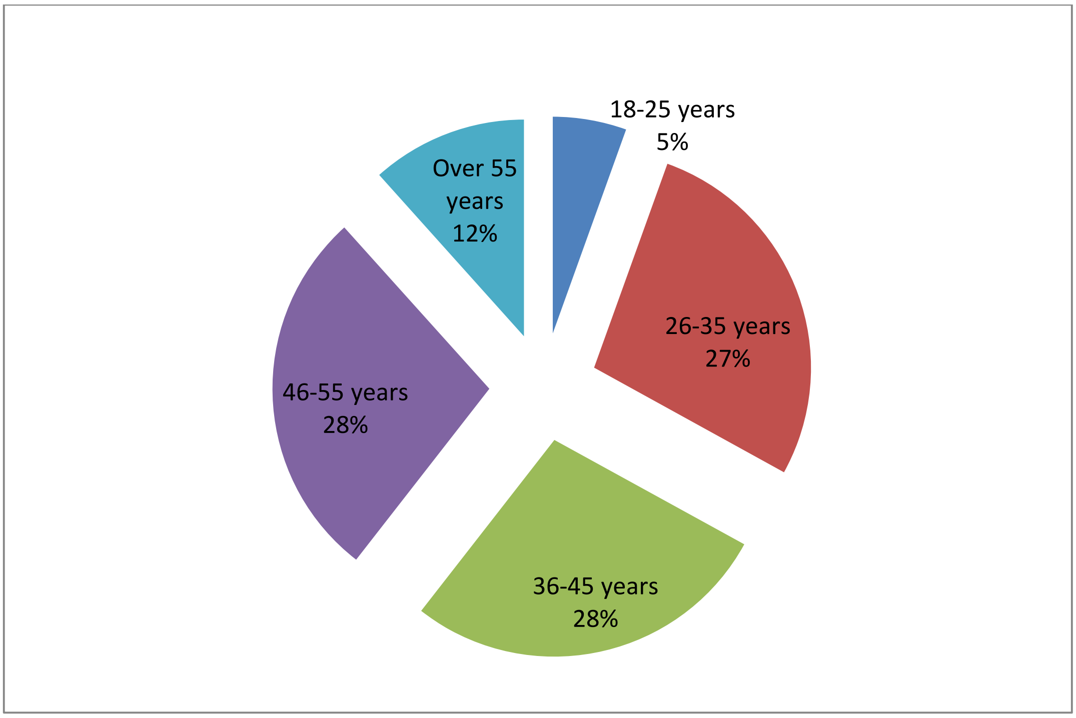
Table 4.05b Reason for leaving settled base for rough sleepers in Southwark 2018/2019

Reason for leaving last settled base	%
Asked to leave or evicted	29.0%
Employment and education	16.1%
Relationships	22.6%
Financial	4.8%
End of stay in short or medium term accommodation	3.2%
Victim of violence, harassment or abuse	1.6%
End of stay in institution	6.5%
Transient/travelling around	1.6%
Other	14.5%

Source: CHAIN reports

The graph below shows the age range of people identified as rough sleepers in Southwark in 2018/2019; the numbers are evenly spread across the 26 to 35, 36 to 45 and 46 to 55 years groups.

Chart 4.05c Age range of rough sleepers in Southwark



Source: CHAIN reports

88% of the people seen rough sleeping in Southwark in 2018/19 were male. This is a significantly different gender profile to those approaching the council as homeless. In statutory homeless applications there is an over representation of women; 61% female applicants and 39% male.

Nearly half of the people seen rough sleeping in Southwark in 2018/19 were from the UK. The second most common nationality is 'Eastern Europe' and significant proportion were from Africa. The Southwark rough sleeper population is comparable with London as a whole, 49% of rough sleepers in London in 2018/19 were UK nationals and 31% were Central and Eastern Europeans[13].

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[13] https://airdrive-secure.s3-eu-west-1.amazonaws.com/london/dataset/chain-reports/2019-06-19T08%3A35%3A08/Greater%20London%20bulletin%202018-19.pdf?X-Amz-Algorithm=AWS4-HMAC-SHA256&X-Amz-Credential=AKIAJJDIMAIVZJDICKHA%2F20191128%2Feu-west-1%2Fs3%2Faws4_request&X-Amz-Date=20191128T131659Z&X-Amz-Expires=300&X-Amz-Signature=679d8e56c2ed56ecf76cc4b1aa9d072f2d33f6d8fe6735a28a50c22581bfdeaf&X-Amz-SignedHeaders=host

Table 4.05d Nationalities of rough sleepers in Southwark 2018/2019

Nationality of rough sleepers in Southwark	2018/19
UK	46.2%
Eastern Europe	29.0%
Other EEA	9.8%
Other Europe Non-EEA	0.5%
Other Europe Not Known	1.3%
Africa	3.6%
Asia	0.5%
Americas	1.6%
Australasia	0.3%
Not known	7.0%

Source: CHAIN reports

The most prevalent support need profile is alcohol, drugs and mental health needs.

Table 4.05e Support needs of rough sleepers in Southwark 2018/2019

Support Need	Number	%
Alcohol only	35	13%
Drugs only	29	11%
Mental health only	34	13%
Alcohol and drugs	12	4%
Alcohol and mental health	22	8%
Drugs and mental health	29	11%
Alcohol, drugs and mental health	57	21%
All three no	36	13%
All three no, not known or not assessed	16	6%

Source: CHAIN reports

4.06 Overcrowding and under-occupation

London has the worst overcrowding in the country and rates of overcrowding are higher than the London average in Inner London boroughs such as Southwark. Overcrowding can impact on levels of educational attainment, for example due to children and young people not having room to study in the home or suffering disturbed sleep patterns. These problems can lead to increased costs to health and social care and education services.

Using census data there are a number of different ways of measuring overcrowding and under-occupation, including the number of persons per room or bedroom, and occupancy ratings by room or bedroom.

In 2011 there were 18,475 overcrowded households lacking at least one bedroom, including 3,526 'severely overcrowded' households who were 2 or more bedrooms below the standard.[14]

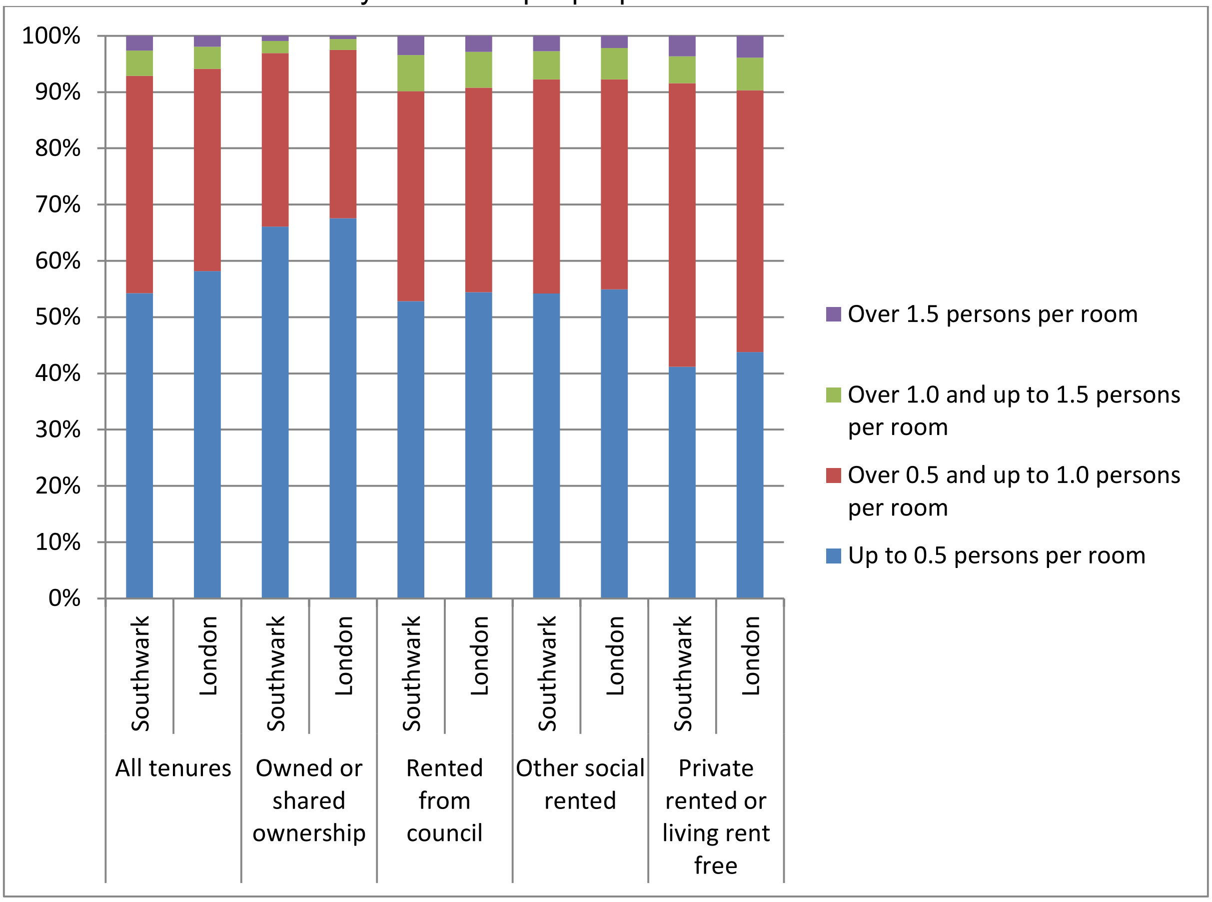
[14] 2011 Census, Table QS412EW has further detail on definitions.

Table 4.04a Households by number of people per room Southwark and London 2011

Tenure	Area	Up to 0.5 persons per room	Over 0.5 and up to 1.0 persons per room	Over 1.0 and up to 1.5 persons per room	Over 1.5 persons per room
All tenures	Southwark	54%	39%	5%	3%
	London	58%	36%	4%	2%
Owned or shared ownership	Southwark	66%	31%	2%	1%
	London	68%	30%	2%	1%
Rented from council	Southwark	53%	37%	6%	3%
	London	54%	36%	6%	3%
Other social rented	Southwark	54%	38%	5%	3%
	London	55%	37%	6%	2%
Private rented or living rent free	Southwark	41%	50%	5%	4%
	London	44%	47%	6%	4%

Source: Census table DC4406EW – households by number of persons per room

Chart 4.04b Households by number of people per room in Southwark and London



Source: Census table DC4406EW – households by number of persons per room

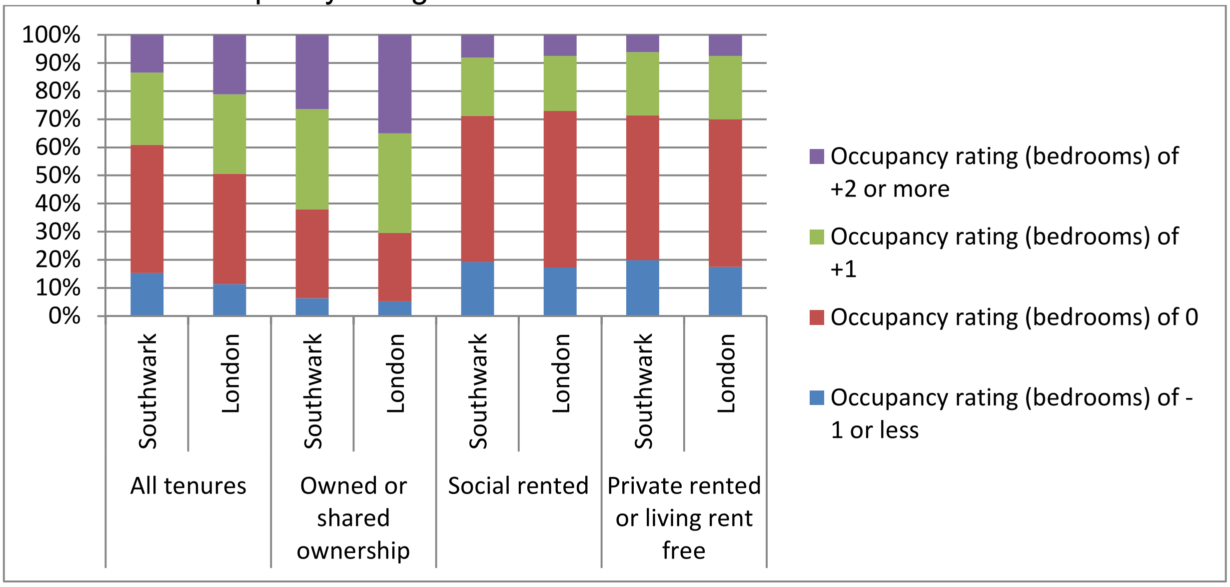
Occupancy ratings are available for households in the social rented sector but not broken down into those renting from local authorities and other social landlords. An occupancy rating of -1 or less indicates that a household has at least one bedroom too few for the number and composition of people living in the household and is considered overcrowded (ONS definition). Overcrowding is highest in the social and private rented sectors.

Table 4.04c Occupancy ratings in Southwark and London 2011

Tenure	Area	Occupancy rating (bedrooms) of -1 or less	Occupancy rating (bedrooms) of 0	Occupancy rating (bedrooms) of +1	Occupancy rating (bedrooms) of +2 or more
All tenures	Southwark	15%	45%	26%	13%
	London	11%	39%	28%	21%
Owned or shared ownership	Southwark	6%	32%	36%	26%
	London	5%	24%	35%	35%
Social rented	Southwark	19%	52%	21%	8%
	London	17%	56%	20%	8%
Private rented or living rent free	Southwark	20%	51%	23%	6%
	London	18%	52%	23%	7%

Source: Census table LC4108EW

Chart 4.04d Occupancy ratings in Southwark and London 2011



Source: Census table LC4108EW

5.0 AFFORDABLE HOUSING SUPPLY

The three main categories of affordable housing are social rented, intermediate and affordable rent

- Social rented housing is homes available to rent either from the council, a housing association (also known as registered social landlords or RSLs) or other affordable housing providers. The allocation of social housing is based on housing need
- Affordable rented housing is let by local authorities, or private registered providers of social housing, to households who are eligible for social rented housing. Affordable Rent is subject to rent controls that require a rent of no more than 80% of the local market rent (including service charges, where applicable).
- Intermediate affordable housing refers to homes at prices and rents above those of social rented but below private prices or rents. It can include part buy/part rent, key worker housing and intermediate rent housing.

There are two sources of supply of new social rented lettings, relets from existing supply and lets to new supply.

5.01 Social and affordable rent lettings

The number of council lettings has halved over the past ten years. In the years around 2009/10 there was generally about 2,300 lettings a year. This has broadly fallen over the past ten years and last year only 875 council lettings were recorded. While this might have slightly been impacted by the covid19 pandemic in March 2020 this would only account for a small amount of the reduction in lettings.

In 2019/20, there were 875 lettings of which 469 were to new tenants, 346 were to existing tenants and there were 60 mutual exchanges.

In 2019/20, 225 households accepted Southwark’s nomination to housing association accommodation, compared to 634 in 2009/10.

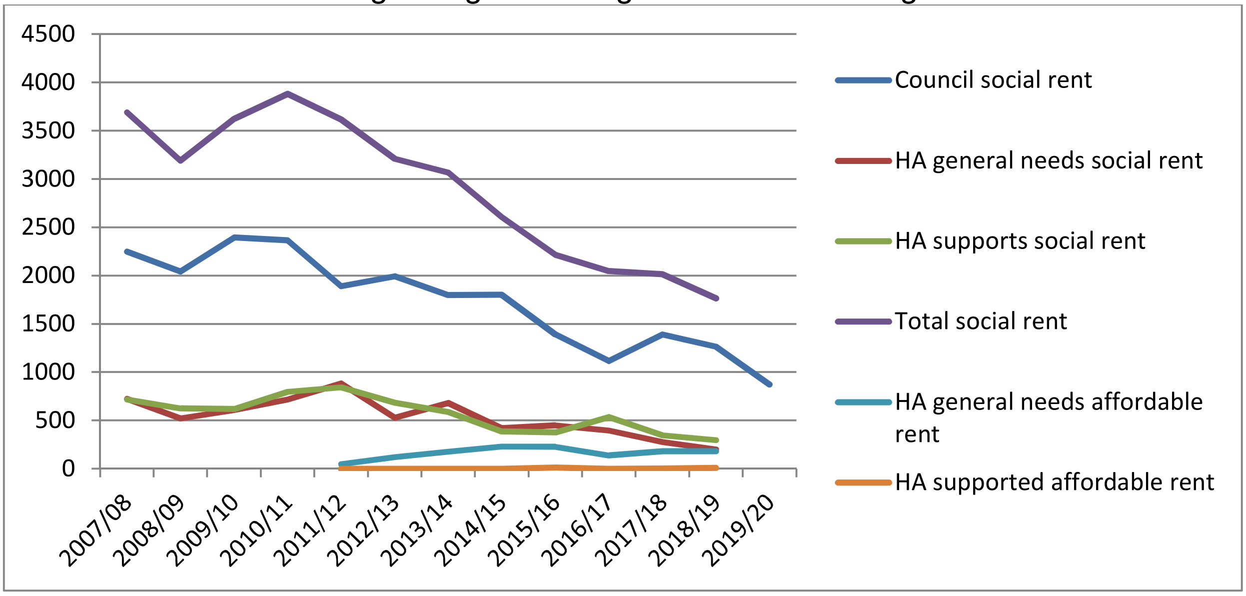
In the housing associations sector in 2018/19 there were 499 housing association social rented lettings (including supported). There were a further 192 affordable rent lettings. This gives a total of 691 housing association lettings. This compares to 1,146 in 2008/09.

Table 5.01a Social Housing Lettings including tenants transferring 2007/08 to 2019/20
Note: Local Authority Date includes mutual exchanges, HA data is from Core so excludes mutual exchanges

	Council social rent	HA general needs social rent	HA supports social rent	Total social rent	HA general needs affordable rent	HA supported affordable rent
2007/08	2248	725	718	3691		
2008/09	2045	522	624	3191		
2009/10	2396	610	617	3623		
2010/11	2364	719	799	3882		
2011/12	1892	882	843	3617	48	0
2012/13	1995	530	684	3209	121	0
2013/14	1797	682	590	3069	177	0
2014/15	1801	420	386	2607	231	0
2015/16	1390	448	377	2215	228	13
2016/17	1117	397	534	2048	138	0
2017/18	1392	276	346	2014	181	2
2018/19	1266	202	297	1765	182	10
2019/20	875	Not yet available	Not yet available	Not yet available		

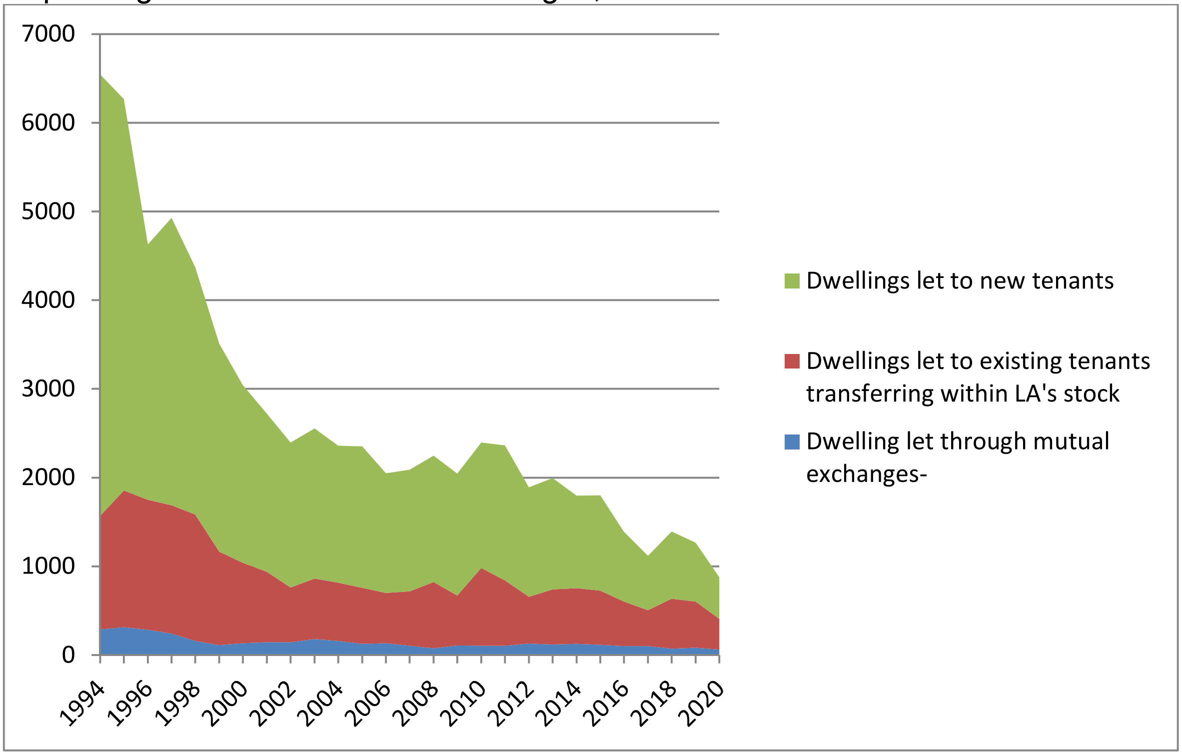
Source: CORE, HSSA, 2007/09 to 2010/11, ELASH 2011/12 and LAHS 2015 to LAHS 2020 + Social Housing Lettings in Southwark since 2015
https://www.gov.uk/government/statistics/social-housing-lettings-in-england-april-2018-to-march-2019

Chart 5.01b Social housing lettings including tenants transferring 2007/08 to 2019/20



Source: CORE, HSSA, 2007/09 to 2010/11, ELASH 2011/12 and LAHS 2014/15 to 2019/20 + Social Housing Lettings in Southwark since 2015
https://www.gov.uk/government/statistics/social-housing-lettings-in-england-april-2018-to-march-2019

Chart 5.01c The proportion of council lettings going to new applicants, tenants requesting transfers or mutual exchanges, 1994 to 2020



Source: HSSA, ELASH and LAHS

5.02 New supply of affordable housing

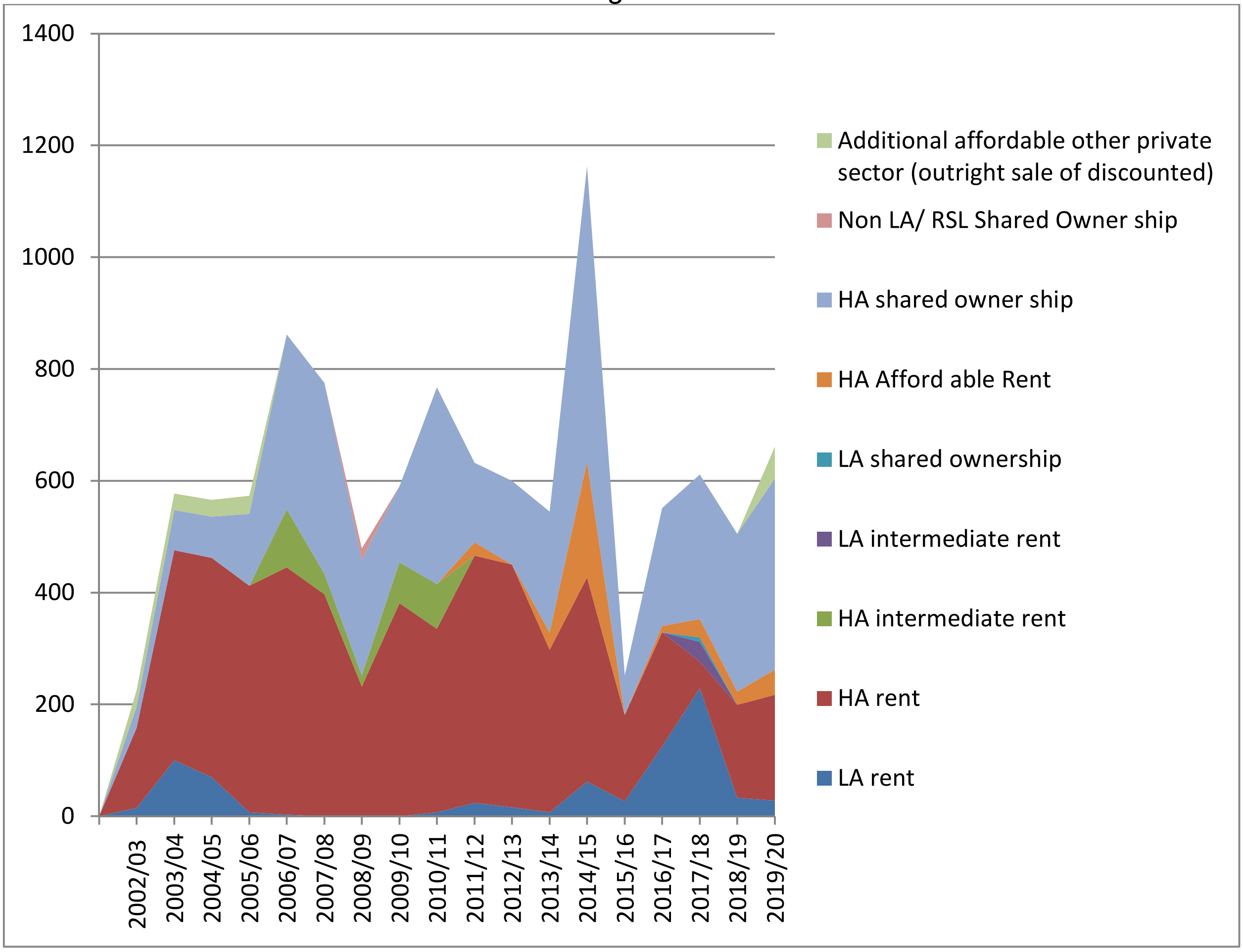
The supply of affordable housing is typically around 600 units a year. In 2014/15 there was 1,163 units due to 2014/15 being the final year of a funding programme. In 2015/16 this dramatically dropped as most schemes had aimed to complete in 2014/15.

Table 5.02a New affordable housing in Southwark 2002/03 to 2019/20

	LA rent	HA rent	HA intermediate rent	LA intermediate rent	LA shared ownership	HA Affordable Rent	HA shared ownership	Non LA/ RSL Shared Ownership	Additional affordable other private sector (outright sale of discounted)	Total
2002/03	15	143	0	0	0	0	38	0	29	225
2003/04	100	376	0	0	0	0	72	0	29	577
2004/05	70	392	0	0	0	0	74	0	30	566
2005/06	7	405	0	0	0	0	129	0	32	573
2006/07	3	442	104	0	0	0	313	0	0	862
2007/08	0	397	36	0	0	0	342	0	0	775
2008/09	0	232	20	0	0	0	206	21	0	479
2009/10	0	381	73	0	0	0	136	0	0	590
2010/11	7	328	80	0	0	0	352	0	0	767
2011/12	24	442	0	0	0	24	142	0	0	632
2012/13	16	434	0	0	0	0	150	0	0	600
2013/14	7	291	0	0	0	31	216	0	0	545
2014/15	62	365	0	0	0	207	529	0	0	1,163
2015/16	27	154	0	0	0	0	71	0	0	252
2016/17	125	204	0	0	0	11	211	0	0	551
2017/18	229	47	0	36	8	33	258	0	0	611
2018/19	33	166	0	0	0	24	282	0	0	505
2019/20	28	189	0	0	0	45	342	0	57	661

Source: HSSA (2002/03 to 2015/16) and internal data

Chart 5.02b Provision of new affordable housing in Southwark 2002/03 to 2019/20



Source: HSSA and internal data

Table 5.02c Affordable housing completions planned as of June 2020

	LA rent	HA rent	HA inter media te rent	LA inter media te rent	LA shared owners hip	HA Afford able Rent	HA shared owner ship	Non LA/ RSL Shared Owner ship	Additional affordable other private sector (outright sale of discounted)	Total
2020/21	187	31	0	0	18	81	147	0	0	464
2021/22	266	200	0	0	24	30	173	0	0	693
2022/23	545	370	0	0	90	90	195	0	0	1,290

Source: Southwark Council Internal Data

Note: These are estimates based on current plans and will change over time as plans are developed and firmed up.