

Southwark key housing data 2015/16

Full version

October 2015

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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

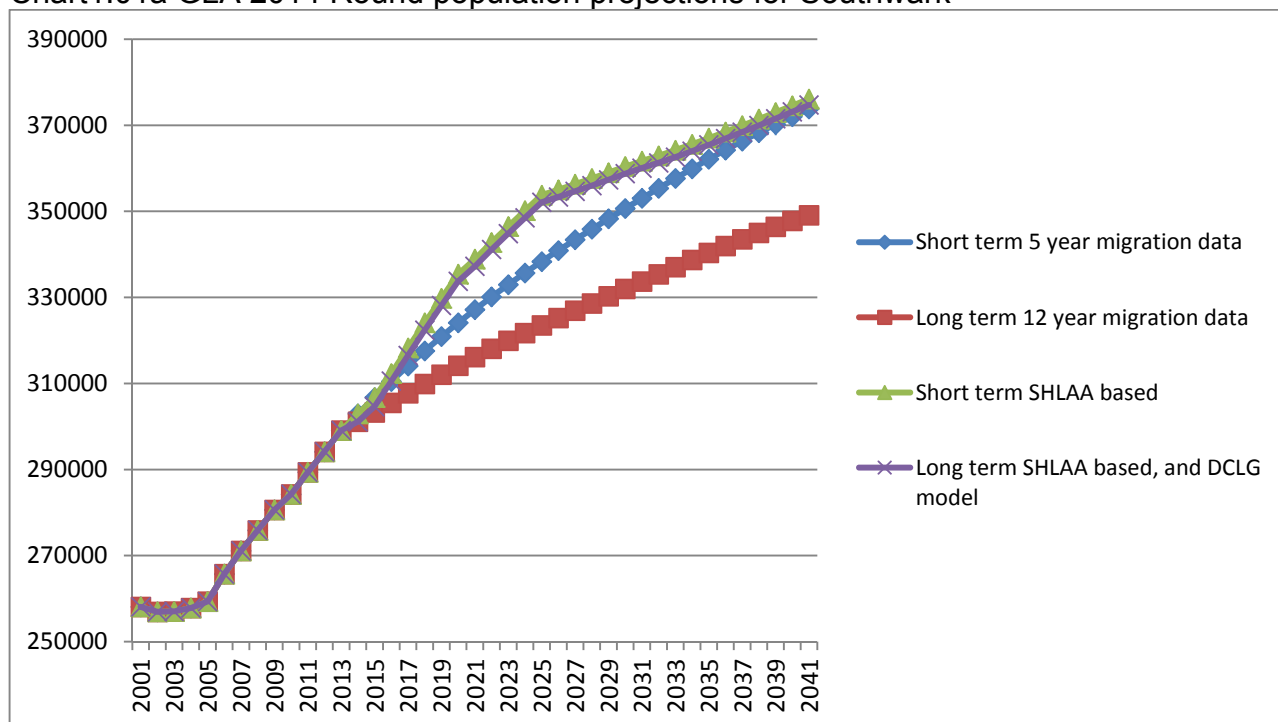
In 2015 Southwark had an estimated population of 306,745¹. The GLA has four variants of local authority level population projections:

- Trend-based projections based on short-term (five year) trends in migration
- Trend-based projections based on long-term (twelve year) trends in migration
- Housing-linked projections incorporating data from the 2013 Strategic Housing Land Availability Assessment (SHLAA), short term migration trends and using the Capped Household Size projection model
- Housing-linked projections incorporating data from the 2013 SHLAA, long-term migration trends and using the DCLG-linked projection model.

The differences in these four projections are shown in the chart below.

¹ These projections are based on the 2014 GLA round population - Trend-based projections based on short-term (five year) trends in migration - <http://data.london.gov.uk/dataset/2014-round-population-projections>

Chart1.01a GLA 2014 Round population projections for Southwark



Source: - <http://data.london.gov.uk/dataset/2014-round-population-projections>

Under the short term 5 year migration data, the projections for Southwark for 2015 assume an increase of about 3,800 households due to net international migration. It predicts a decrease in households due to domestic migration (within the country), the population is also predicted to increase by about 3,500 due to more births than deaths.

Table 1.01b Components of change 2015 – GLA 2014 Round population projections short term 5 year migration data

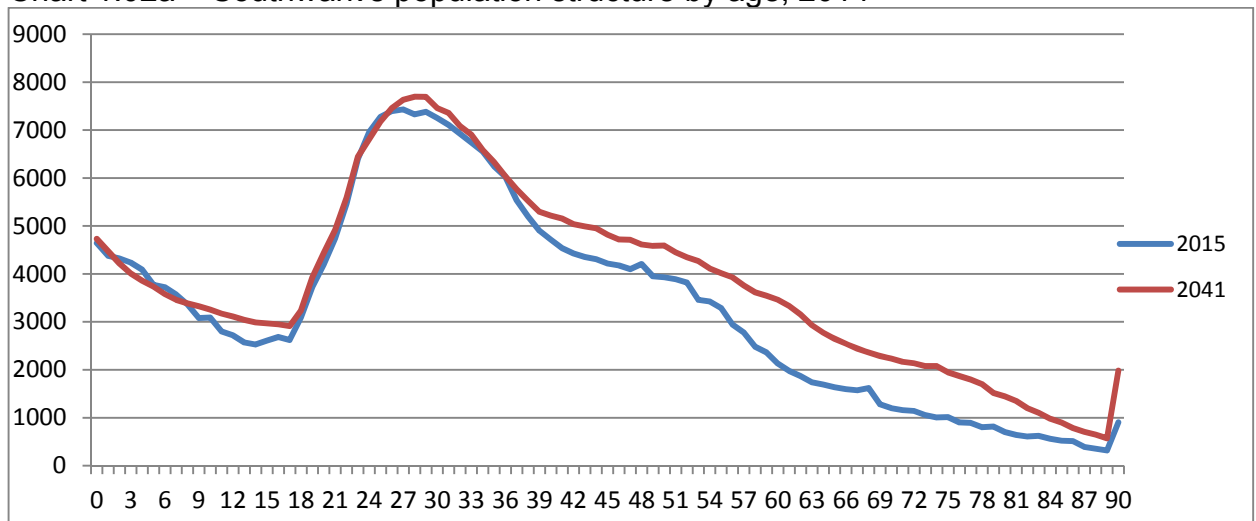
Inter national Outflows	Inter national Inflows	Net Inter national	Domestic Outflows	Domestic Inflows	Net Domestic	Births	Deaths	Natural change
4,472	8,288	3,816	27,891	24,348	-3,543	4781	1250	3531

Source: - <http://data.london.gov.uk/dataset/2014-round-population-projections>

1.02 Age

The GLA 2014 round projections estimated the population of Southwark by age for each year up to 2041. Southwark generally has a much lower age profile than the national picture, due to migration into and out of the borough. Using the long term migration based projections, there will be little difference in the populations around 30 years of age, but the number of people over 40 will increase. The number of people over 90 is projected to increase by over 1,000 by 2041.

Chart 1.02a – Southwark’s population structure by age, 2014



Source: - <http://data.london.gov.uk/dataset/2014-round-population-projections>

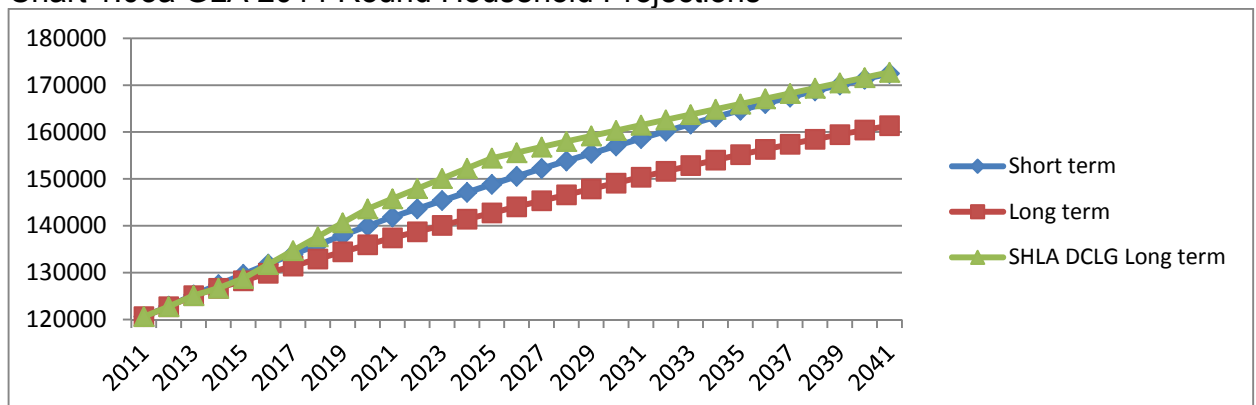
1.03 Households

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 between 128,287 and 129,658 households in Southwark in 2015 depending on projection methodology. This is projected to continue to grow. For the 2014 household projections the GLA used three different methodologies:

- Incorporating the GLA's short-term migration trend-based population projections.
- Incorporating the GLA's long-term migration trend-based population projections.
- Incorporating development assumptions based on the 2013 SHLAA and long term migration assumptions.

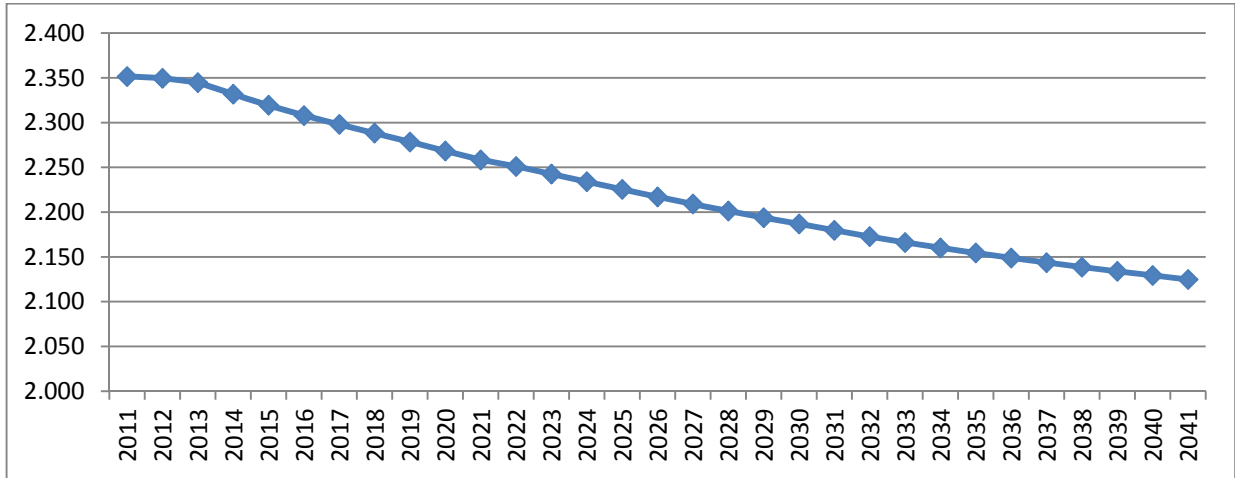
Chart 1.03a GLA 2014 Round Household Projections



Source: - <http://data.london.gov.uk/dataset/2014-round-population-projections>

The average household size is projected to continue to gently fall up to 2041.

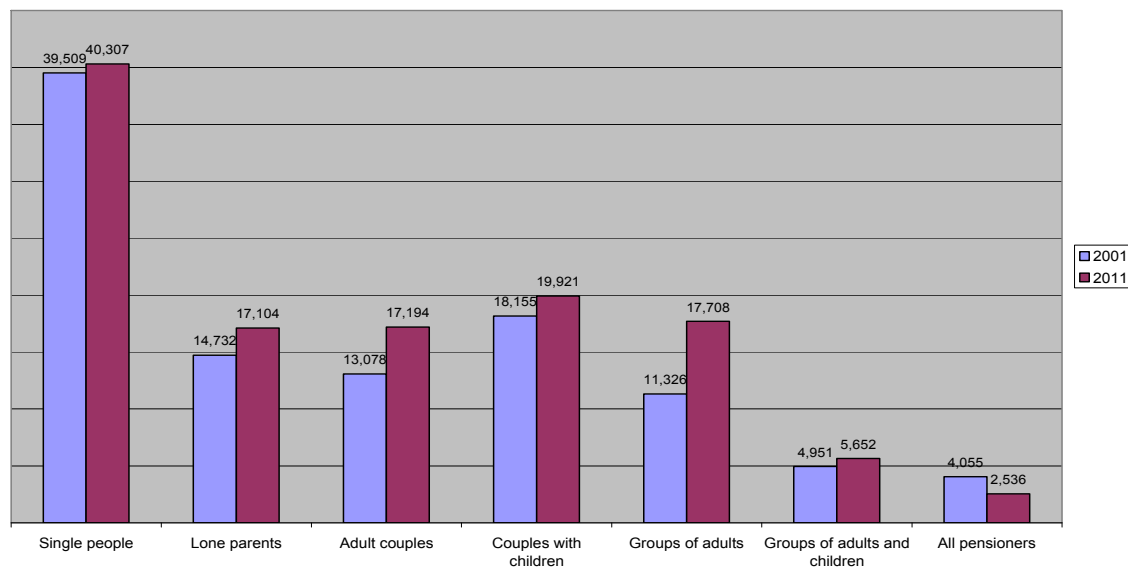
Chart 1.03b GLA 2014 Round Long term household projections – Average household size



Source: - <http://data.london.gov.uk/dataset/2014-round-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 household 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 significantly 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 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 2014 short term projections estimated that in 2015 about 8,300 people would move to Southwark from abroad. It estimated about 3,800 would move abroad. In addition an estimated 24,300 people will move to Southwark from within England but around 27,900 people will move out of Southwark to other places in England.

The Strategic Housing Market Assessment (SHMA)² explored net international migration. It found 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%

² SHMA -

http://www.southwark.gov.uk/downloads/download/3926/strategic_housing_market_assessment

moved to other parts of South East London, 46% moved with London and 32% moved to outside London.

1.06 Population density

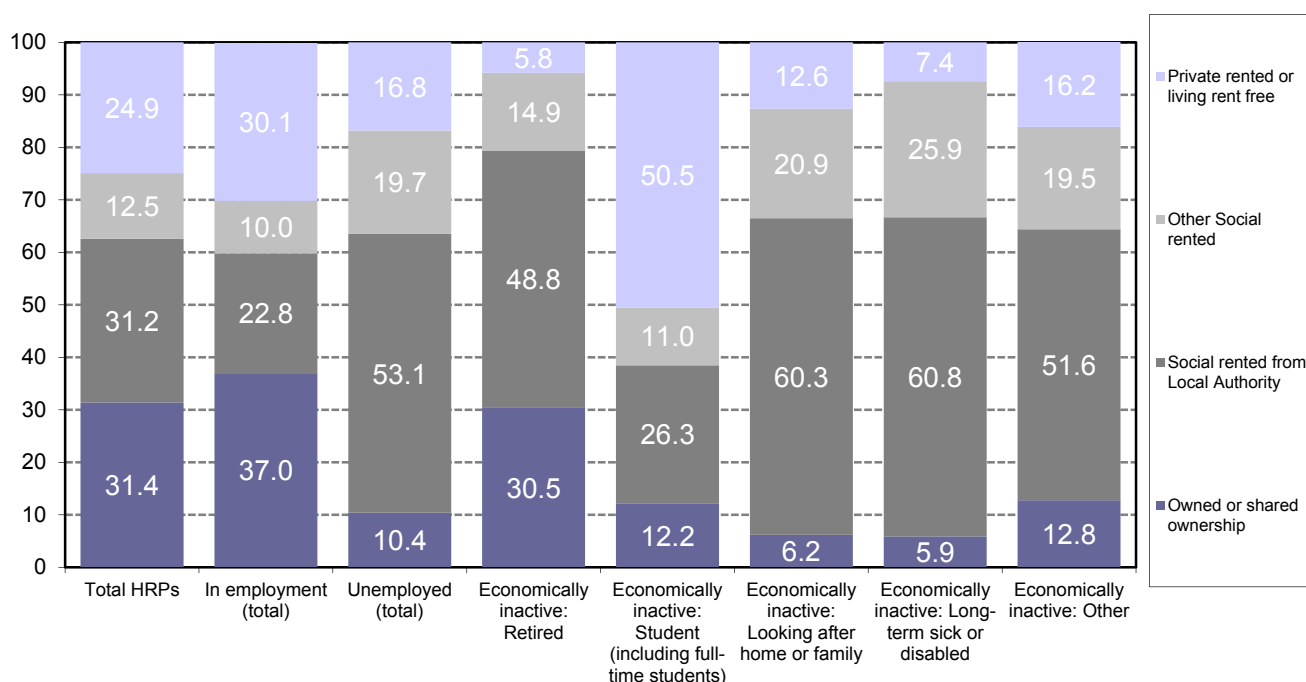
In the 2011 census Southwark had the 9th highest population density in England and Wales. The eight local authorities that have higher densities than Southwark are all inner London authorities.

1.07 Employment

In 2011 37% of heads of households who were in employment in Southwark were owner occupiers comparard to 53.3% in London and 68% in England. 30.1% were private renters, close to the London average of 30.4%.

A large proportion of heads of households in Southwark who are economically inactive and either look after a home or family (60.3%) or are long term sick or disabled (60.8%) live in Council rented tenure. More than half of unemployed HRPs in the borough (53.1%) live in Council rented tenure as do 48.8% of retired HRPs, which is above the London and England average.

Table 1.07a Tenure and economic activity



Source: Census 2011

1.08 Commuting

The Strategic Housing Market Assessment found that in 2010/11 only 13% of workers in Southwark lived in the borough, significantly lower than Lewisham at 53% and Greenwich at 47%. 51,374 people lived and worked in Southwark, 93,977 people

travelled out of the borough for work and a very large 339,645 people travel in to Southwark to work.

1.09 Income and earnings

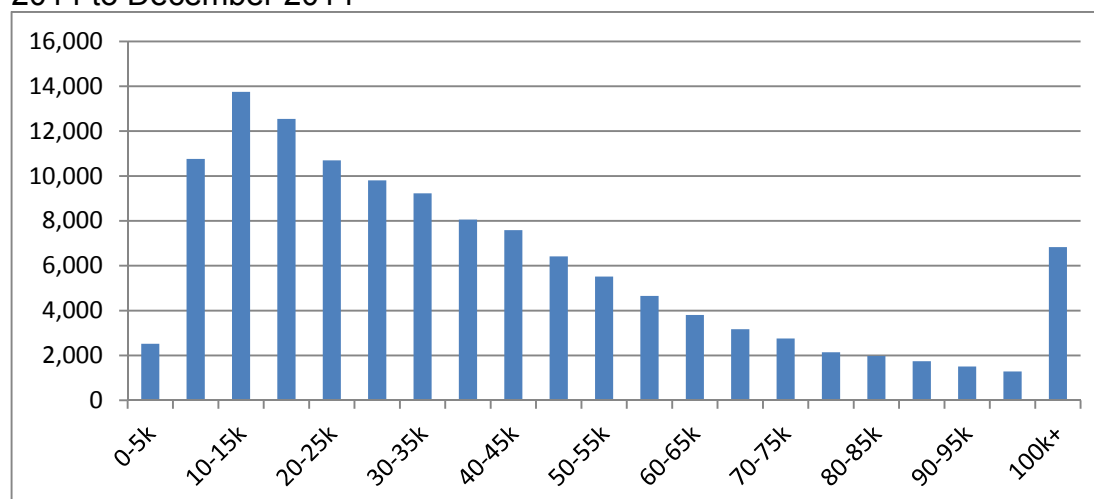
The latest income data for Southwark is from PayCheck, CACI's estimate of household income. It is based upon government data sources together with income data for millions of UK households collected from lifestyle surveys and guarantee card returns.

Table 1.09c Household income distribution in Southwark CACI Paycheck data January 2014 to December 2014

Income Band	Number of households	Income Band	Number of households
0-5k	2,516	55-60k	4,651
5-10k	10,763	60-65k	3,807
10-15k	13,754	65-70k	3,170
15-20k	12,543	70-75k	2,755
20-25k	10,699	75-80k	2,138
25-30k	9,803	80-85k	1,976
30-35k	9,228	85-90k	1,739
35-40k	8,060	90-95k	1,506
40-45k	7,583	95-100k	1,283
45-50k	6,416	100k+	6,829
50-55k	5,513		

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

Chart 1.19d Household income distribution in Southwark CACI Paycheck data January 2014 to December 2014



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

1.10 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.³
- 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.⁴ The number of working age people with serious physical disabilities is projected to increase by 23% between 2012 and 2020.⁵

1.11 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 2015 measure relative levels of deprivation in 32,844 small areas or neighbourhoods, called Lower-layer Super Output Areas, in England. Most of the indicators used for these statistics are from 2012/13

The English Indices of Deprivation 2015 are based on 37 separate indicators, organised across seven distinct domains⁶ of deprivation which are combined, using appropriate weights, to calculate the Index of Multiple Deprivation 2015 (IMD 2015). This is an overall measure of multiple deprivation experienced by people living in an area and is calculated for every Lower layer Super Output Area (LSOA), or neighbourhood, in England. Every such neighbourhood in England is ranked according to its level of deprivation relative to that of other areas.

Using the average score method Southwark was the 40th most deprived district (compared to 41st in 2010). It was the 8th most deprived in London (12th in 2010).

Using the average rank, Southwark was the 23rd most deprived district (compared to 25th in 2010) and 9th most deprived in London (11th in 2010).

On the rank of proportion of LSOAs in the most deprived 10% nationally, Southwark was the 23rd most deprived nationally and 14th in London.

³ Southwark Private Sector House Condition Survey 2008

⁴ 2011 Census

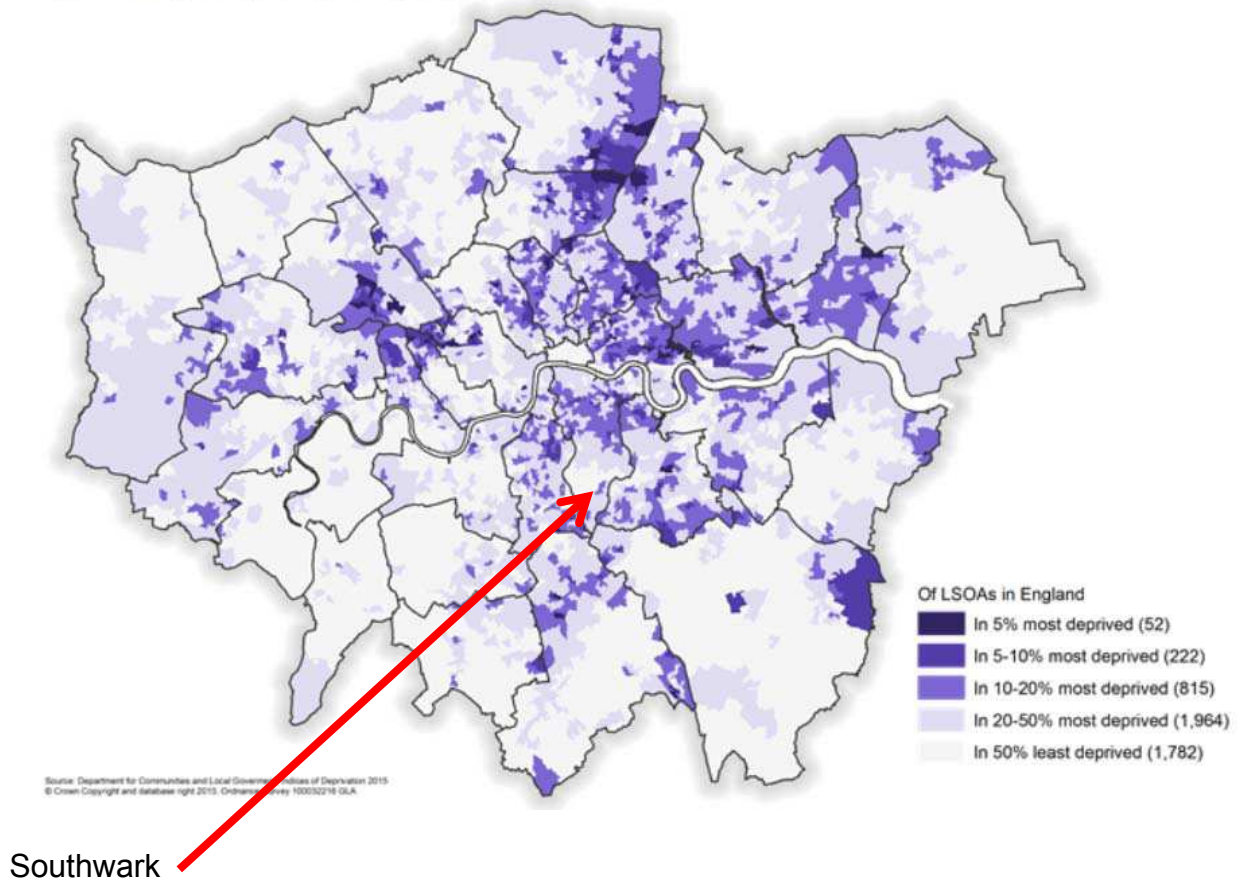
⁵ SHMA

⁶ These are Income Deprivation; Employment Deprivation; Health Deprivation and Disability; Education, Skills and Training Deprivation; Crime; Barriers to Housing and Services; and Living Environment Deprivation.

8 LSOAs (5%) in Southwark fell within the 10% most deprived in England in 2015 compared with 4 LSOAs in 2015. These were in Camberwell Green, Rotherhithe, East Walworth, South Bermondsey, and Nunhead.

“Barriers to housing and services” is a poorly performing category for Southwark. Southwark is 22nd highest on the average rank (18th in London) and 23rd 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).

Index of Multiple Deprivation 2015, London

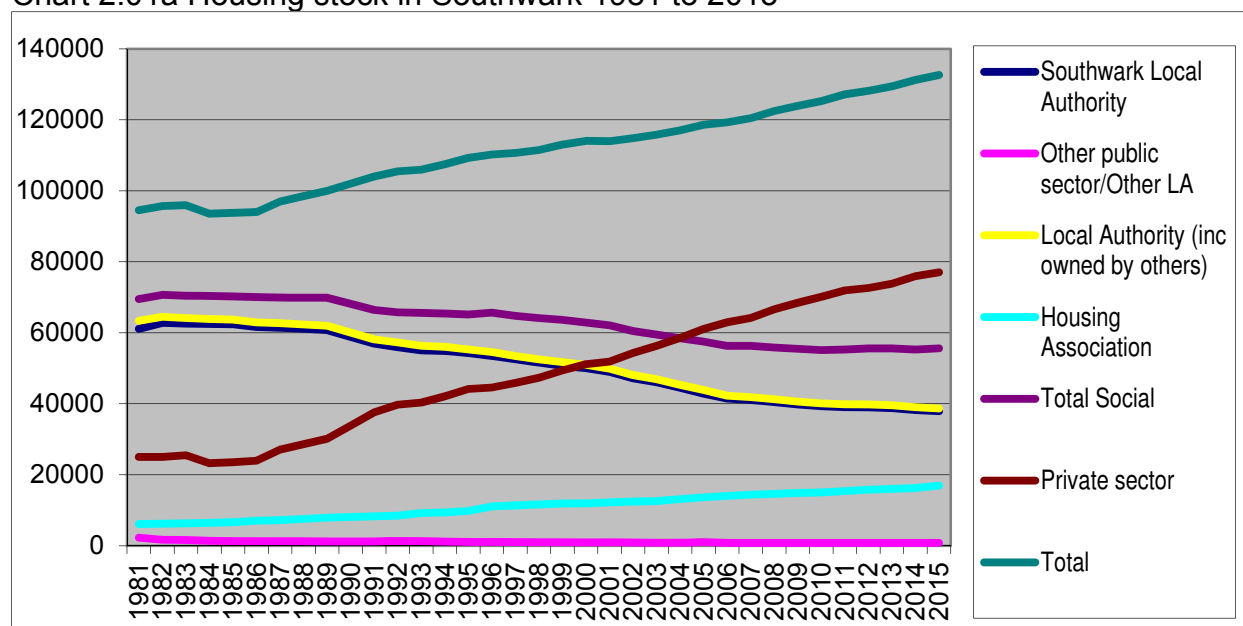


2.0 The housing stock in Southwark

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 April 2015, 41.9% of the stock in Southwark was social rented housing compared to 17.1% in England (2014 figure). 58.1% of properties were either owner occupied, shared ownership or private rented, compared with 82.6% in England (2014 figure).⁷

Chart 2.01a Housing stock in Southwark 1981 to 2015



Source: HIP Returns, HSSAs, ELASH and LAHS 1981-2015

Note: The other LA stock is properties owned by the City of London and Lewisham Council within Southwark.

Between 2005 and 2015 the council rented stock (including owned by City of London and Lewisham) fell by 11.8% from 43,885 to 38,687. Total housing association stock has risen to 16,918 in 2015, a rise of 24.1% since 2005. Private sector (non-HA) stock in the borough continues to grow. Between 2005 and 2015 private stock levels have risen by 26.1% from 61,096 to 77,023. Overall, the total dwelling stock in the borough has risen by 11.8% between 2005 and 2015 to 132,630. 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.

⁷ DCLG stock estimates -

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/423249/Dwelling_Stock_Estimates_2014_England.pdf

Table 2.01b Housing stock in Southwark 2001 to 2015

	Southwark Local Authority		Local Authority (inc owned by others)		Housing Association		Total Social		Private sector		Total
2001	48,999	43.0%	49,909	43.8%	12,185	10.7%	62,094	54.5%	51,870	45.5%	113,964
2002	47,191	41.1%	48,083	41.9%	12,413	10.8%	60,496	52.7%	54,331	47.3%	114,827
2003	46,043	39.8%	46,905	40.5%	12,583	10.9%	59,488	51.4%	56,313	48.6%	115,801
2004	44,540	38.1%	45,346	38.7%	13,131	11.2%	58,477	50.0%	58,562	50.0%	117,039
2005	42,861	36.1%	43,885	37.0%	13,636	11.5%	57,521	48.5%	61,096	51.5%	118,617
2006	41,469	34.8%	42,275	35.4%	14,043	11.8%	56,318	47.2%	62,956	52.8%	119,274
2007	41,071	34.1%	41,873	34.8%	14,403	12.0%	56,276	46.7%	64,175	53.3%	120,451
2008	40,485	33.1%	41,287	33.7%	14,569	11.9%	55,856	45.6%	66,611	54.4%	122,467
2009	39,816	32.1%	40,618	32.8%	14,849	12.0%	55,467	44.8%	68,481	55.2%	123,948
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

Source: Housing Strategy Statistical Appendix 2001-2015

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:

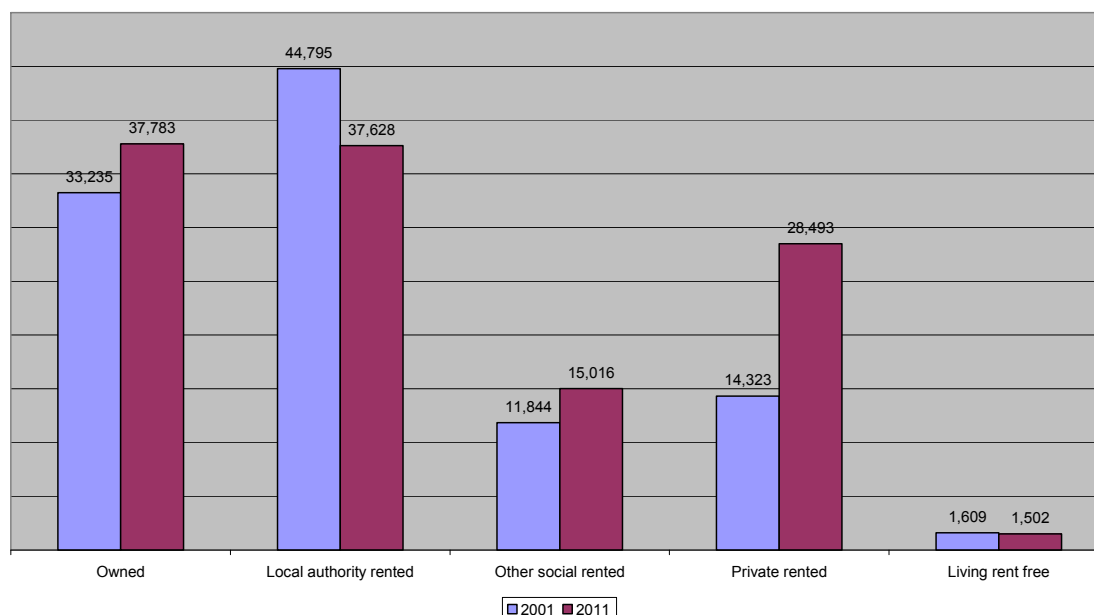
Housing tenure	2001	2001	2011	2011
Owned	33,235	31.4	37,783	31.4
Local authority rented	44,795	42.3	37,628	31.2
Other social rented	11,844	11.2	15,016	12.5
Private rented	14,323	13.5	28,493	23.7
Living rent free	1,609	1.5	1,502	1.2
Total households	105,806	100	120,422	100

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 HRP 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 bedsits)	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 sub-region, it has the highest proportion of flats/maisonettes.

2.03 Local Authority stock breakdown

Local authority dwelling stock in Southwark (including owned by other Local Authorities) has fallen from 43,885 in 2005 to 38,687 in 2015 representing a stock fall of 11.8%. Since its peak of 64,490 in 1982 the LA stock has fallen by 40%.

In April 2015 Southwark Council's rented stock in Southwark was 37,904 including 13 rented properties in Bexley. 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. Approximately 4,300 of the Southwark Council properties are managed by Tenant Management Organisations.

In April 2015 there were also 804 dwellings in the borough owned by other local authorities or public sector bodies. The City of London owned 786 and Lewisham Council owned 16. There were a further 2 NHS properties.

In April 2015 Southwark was the 4th largest local authority rented landlord in the country and the largest in London. Only Birmingham, Leeds and Sheffield have a larger LA rented stock.

Table 2.03a Local authority stock figures for April 2015

Rank	Local Authority	All LA stock in area (inc owned by others)
1	Birmingham	63,025
2	Leeds	56,758
3	Sheffield	40,383
4	Southwark	37,904
5	Sandwell	29,414
6	Bristol, City of UA	27,591
7	Nottingham UA	26,911
8	Newcastle upon Tyne	26,138
9	Islington	25,522
10	Kingston upon Hull, City of UA	24,974
11	Lambeth	24,348
12	Camden	23,256
13	Kirklees	23,055
14	Wolverhampton	22,960
15	Hackney	22,587

Source: DCLG Local Authority Housing Statistics 2014-15

Table 2.03b Council properties by property type and size, as of March 31 2015 (excluding 6 shared ownership)

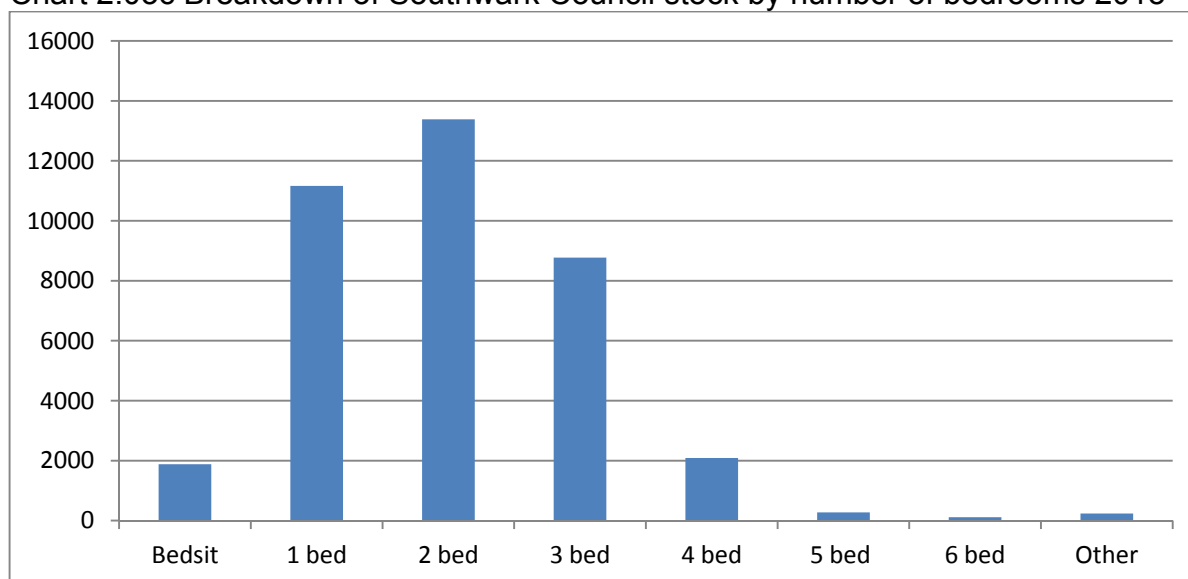
Type	Bedsit	1 bed	2 bed	3 bed	4 bed	5 bed	6 bed	Other	Total
Houses	3	248	713	1,742	831	194	92		3,823
Bungalows	31	124	21	2	17	-	-		195
Low Rise flats	489	2404	631	304	46	9	1		3,884
Med Rise flats	989	5779	7,234	5,069	1,031	71	24		20,197
High Rise flats	370	2609	4,785	1,654	166	1	-		9,585
Non-permanent								3	3
Multi-occupied								235	235
TOTAL	1882	11164	13,384	8,771	2,091	275	117	238	37,922

Source: Council's internal housing database as of March 31 2015

Note: Figures don't exactly total figures used above due to certain exclusions.

The age of the stock is quite varied with 11% built before 1918, 15% between 1919 and 1944, 31% between 1945 and 1964 and 43% built after 1964. The following chart shows that the majority of council properties have 1 or 2 bedrooms. There are very few council properties that have more than 3 bedrooms.

Chart 2.03c Breakdown of Southwark Council stock by number of bedrooms 2015



Source: Southwark internal records, March 31 2015

Sales and Right to buy (RTB)

Since the right to buy was introduced Southwark Council's rented stock level has fallen to 37,904 in 2015. 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 cases. 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 2013/14 there were 1,047 right to buy applications, which fell to 835 in 2014/15. Sales have increased to 250 in 2013/14 and 304 in 2014/15.

Chart 2.03d Right to buy yearly sales and total sales in Southwark 1998/99 to 2014/15

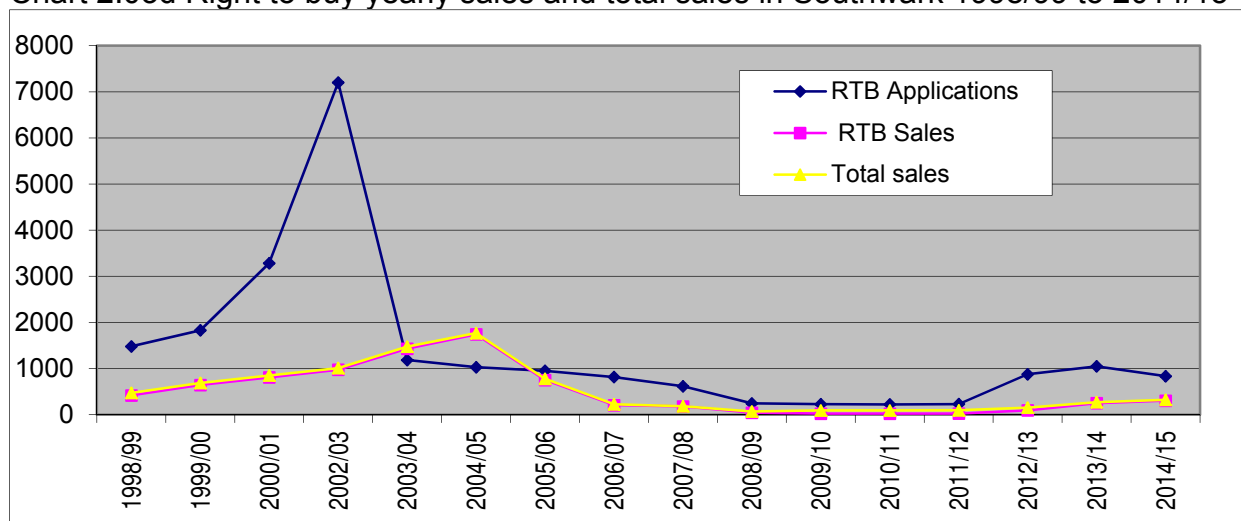


Table 648 Social housing sales: Local authority stock sold through right-to-buy and other council house sales (plus P1B data 2010+2011, ELASH 2012 and LAHS 2013-15)

Social Homebuy

Social Homebuy was introduced in 2006 and allows tenants a more flexible way of buying their council or housing association property. Secure council tenants still receive a discount on their initial purchase and can choose to own a proportion of their property, from 25% to 100%. By 28 June 2015, 8 social homebuy sales had been completed.

Council Homeowners (Leaseholders and service charge payers)

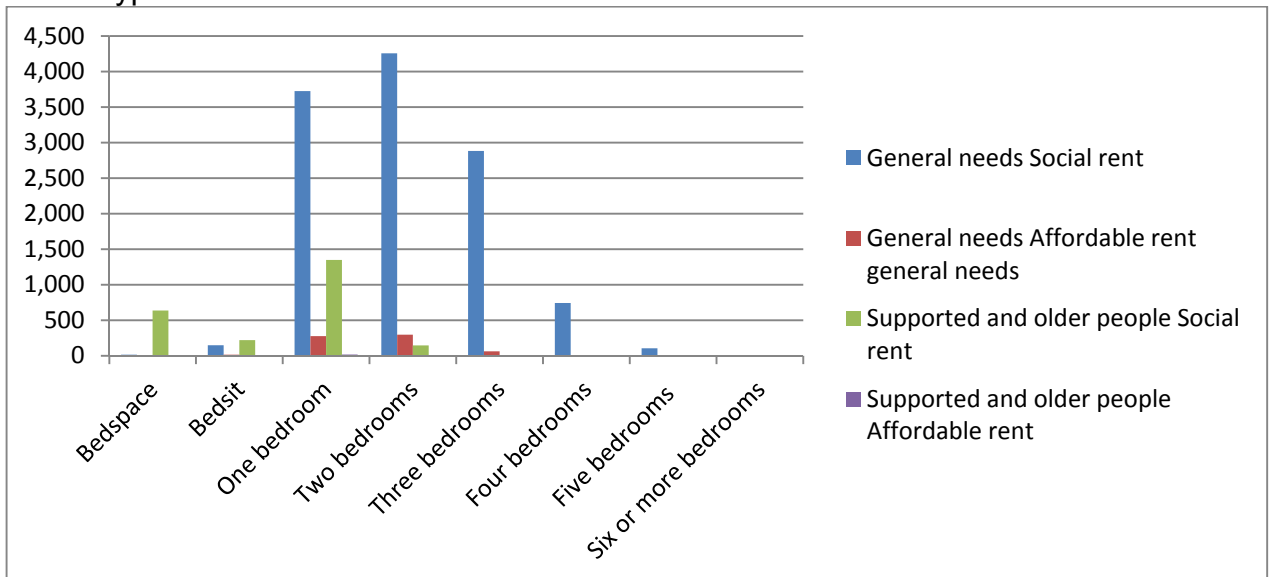
As of 28 June 2015 there were 13,235 Southwark Council leaseholders, 8 social homebuy, 9 shared ownership and 1,159 households who own the freehold but pay a service charge to Southwark Council and a further 745 other sales. So in total there are around 15,000 Council homeowners and a further 2,000 freeholders who do not pay a service charge.

2.04 Housing Association stock breakdown

Total housing association stock has risen to 16,918⁸ in 2015, a rise of 24.1% since 2005. The largest proportion of the stock is one bed stock at 36% followed by two bed 31% and three bed 20%.

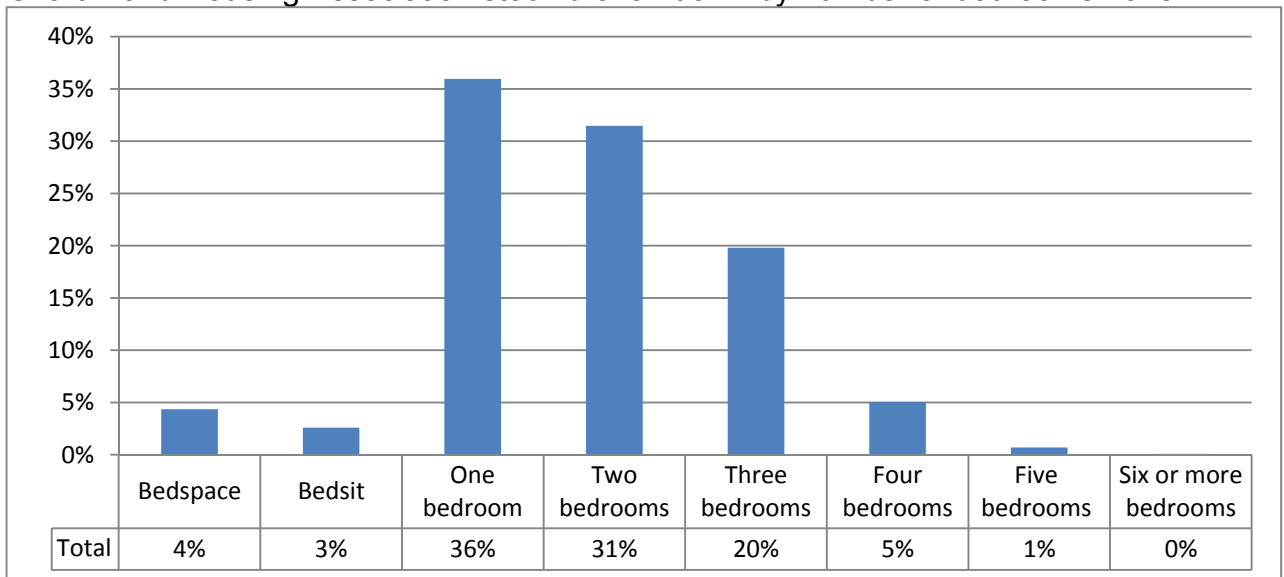
⁸ Estimate used in the LAHS form 2015 (this estimate differs slightly from the SDR2015 published after the LAHS deadline, which gives a HA stock of 16,766)

Chart 2.04b Housing Association stock broken down by number of bedrooms and tenure type 2015



Source: SDR2015

Chart 2.04b Housing Association stock broken down by number of bedrooms 2015



Source: SDR2015

Table 2.04c Top 15 Housing Associations in Southwark by overall stock size 2015

Rank	PRP name	General needs, self contained and non self contained, supported and older people housing
1	London & Quadrant Housing Trust	1,866
2	Hyde Housing Association Limited	1,434
3	Peabody Trust	1,562
4	Hexagon Housing Association Limited	1,269
5	Family Mosaic Housing	1,177
6	AmicusHorizon Limited	1,160
7	Wandle Housing Association Limited	998
8	Affinity Sutton Homes Limited	940
9	Notting Hill Housing Trust	966
10	Southern Housing Group Limited	601
11	The Guinness Partnership Limited	549
12	Metropolitan Housing Trust Limited	273
13	The Riverside Group Limited	188
14	Habinteg Housing Association Limited	168
15	Lambeth & Southwark Housing Association Limited	158

Source: SDR2015

In 2011 Southwark was ranked 6th highest nationally in terms of the percentage of the borough's households in the shared ownership sector, just over 2% representing 2,453 households, up from 1,449 in 2001.

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 dependant children. 39% of PRS households with dependant 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.

Using estimates of the current size of the housing stock, in Southwark, there are probably about 35,000 private rented properties in Southwark, or 25.7% of the stock in Southwark.

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.

At least 32% of households surveyed had children. 33% of the sample was houses in multiple occupation HMOs.

Tenants were typically paying about £317 in agents 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 as demonstrated by the following table.

Total Southwark gross household income per year by bands

Income bands	% South East London and Lambeth	% Southwark
Under £5,200	3	5
£5,200 -£10,400	10	14
£10,401 -£15,600	16	25
£15,601 -£20,800	15	21
£20,801 -£26,000	14	8
£26,001 -£31,200	15	8
£31,201 -£36,400	9	8
£36,401 -£41,600	6	4
£41,601 -£46,800	4	3
Over £46,800	8	5

Source: Cobweb Private Rented Sector Study 2014 – Borough Summary

2.05 Housing for older people

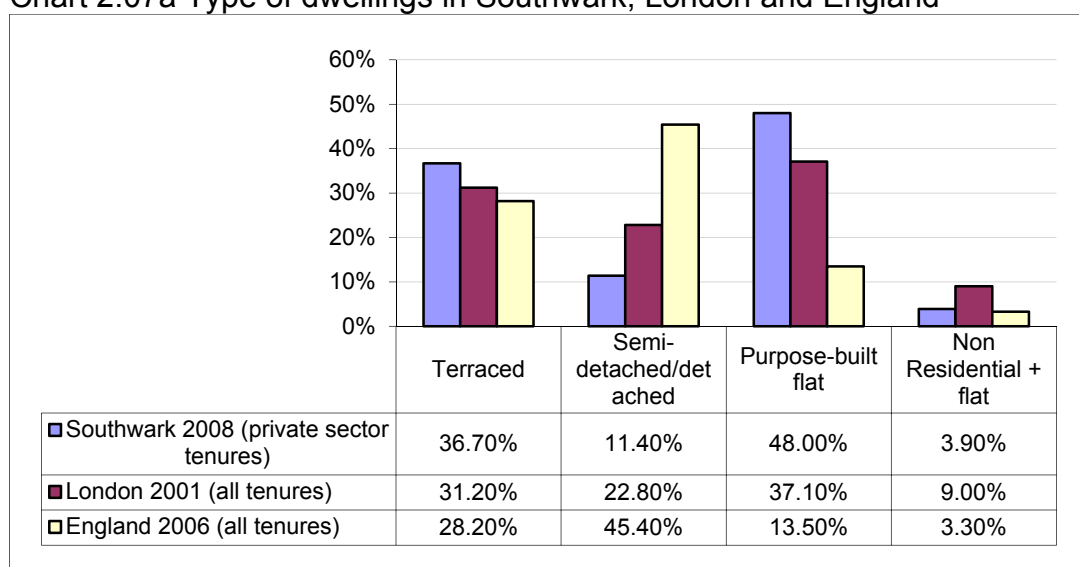
There are approximately 1,310 sheltered housing units in Southwark. There are 620 Southwark Council units and 690 RSL and Alms House units, including Darwin Court (for over 50's). Two of the schemes are extra care schemes. These are Lew Evans which is a Council scheme which was converted from a sheltered housing scheme in 2009. This is a 38 bed unit owned and managed by Southwark Council. The other scheme is 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 scheme has 54 units. The council also now has an additional extra care 94 units in development, on two separate sites and is currently working with an RSL on a site in the north of the borough for a further 50+ flats. The council is currently assessing the need for two further additional extra care schemes for 100 units + each, one in the north and one in the south of the borough, in response to the challenges posed by an aging population. 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.

2.07 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 2.07a Type of dwellings in Southwark, London and England



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.⁹ In comparison: 25% of dwellings across England were constructed pre -1919; 34% between 1919-1964 and 41% after 1964.¹⁰

2.08 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 2015 there were a total of 529 vacant Southwark Council properties in Southwark and a total of 533 vacant local authority stock (including Lewisham and City of London).

⁹ PSHCS, 2008

¹⁰ English Housing Survey 2008-09

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.¹¹

2.09 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 private sector house condition survey estimated there were approximately 17,000 dwellings in the private sector that were HMOs. Around half of these are shared homes. The Council estimates this could now have gone up to around 18,000 based on anecdotal evidence.

Table 2.09a Categories of HMO in Southwark 2008

H.M.O. Type	Estimated No. (Dwellings)	% (All H.M.O.s)
Bedsit	1,200	7.0%
Shared Home	8,500	50.3%
Education / Employment linked*	450	2.6%
Hostel*	200	1.1%
Registered Care Home*	350	2.1%
Household with Lodger*	900	5.1%
Potential Converted Flat H.M.O.	5,400	31.8%
Any (incl. potential) H.M.O.	17,000	100.0%

Source: London Borough of Southwark Private House Condition Survey 2008

*Note – Caution should be exercised with these findings due to the comparatively small sample sizes in these categories.

2.10 Stock Condition

Stock condition - Housing health and safety rating system

The Housing Health and Safety Rating System (HHSRS) became operational in April 2006. The new 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.

¹¹ PSHCS, 2008

Overall, across the private sector and housing association stock in Southwark, there were approximately 28,700 dwellings with a category 1 hazard, about 37% of private sector homes.

Table 2.10a 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 2.10b 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).

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 – In 2014/15 2,743 council homes were made decent, and 2,094 were made decent in 2013/14. Although this has contributed to clearing the backlog of non decent homes, it has been accompanied by a significant number of previously decent properties falling into non-decency during the same period. 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 every year. In 2014/15 2,173 council properties became non decent.

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.

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

2.11 Repair costs in the private sector in 2008

- 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.¹² The total cost of

¹² 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.

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.

- 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.

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

In July 2015 Rightmove estimated that the average house price in Southwark stood at £594,483. This was 2.3% higher than the previous year. This was lower than the Greater London average of £615,115 but higher than the national average of £294,542. The national figure was 5.1% higher than the previous year and the London figure was 7.8% higher.¹³ Hometrack said the overall average price in Southwark in May 2015 was £558,724 and the lower quartile was £340,000. For a two bed flat the average was £474,282 and the lower quartile was £340,000.

Table 3.01a Average and lower quartile prices in South East London and Lambeth by housing type, May 2015 as downloaded from Hometrack in July 2015

	Area name	Overall	Detached	Semi Detached	Terraced	Flat	M ²
Median	Bexley	297,413	506,149	346,285	271,841	182,117	3,150
	Bromley	445,715	778,633	468,210	382,970	277,357	3,940
	Greenwich	390,846	965,459	495,437	414,484	317,163	4,254
	Lambeth	539,758	1,171,755	956,905	824,054	430,120	6,188
	Lewisham	401,482	832,622	617,100	482,759	299,860	4,576
	Southwark	558,724	1,593,314	1,045,962	769,984	443,886	6,289
Lower quartile	Bexley	224,000	348,000	290,000	240,000	156,995	2,726
	Bromley	282,500	525,000	357,500	290,000	224,000	3,340
	Greenwich	250,000	450,000	340,000	275,000	215,000	3,120
	Lambeth	350,000	675,000	550,000	515,000	325,000	4,914
	Lewisham	269,995	510,000	415,000	370,000	238,000	3,674
	Southwark	340,000	800,000	700,000	600,000	306,000	5,000

Source: Southwark Market Trends Bulletin, from Hometrack's Real Demand system

Table 3.01b Average and lower quartile prices in south east London and Lambeth by housing type and size, May 2015 as downloaded from Hometrack in July 2015

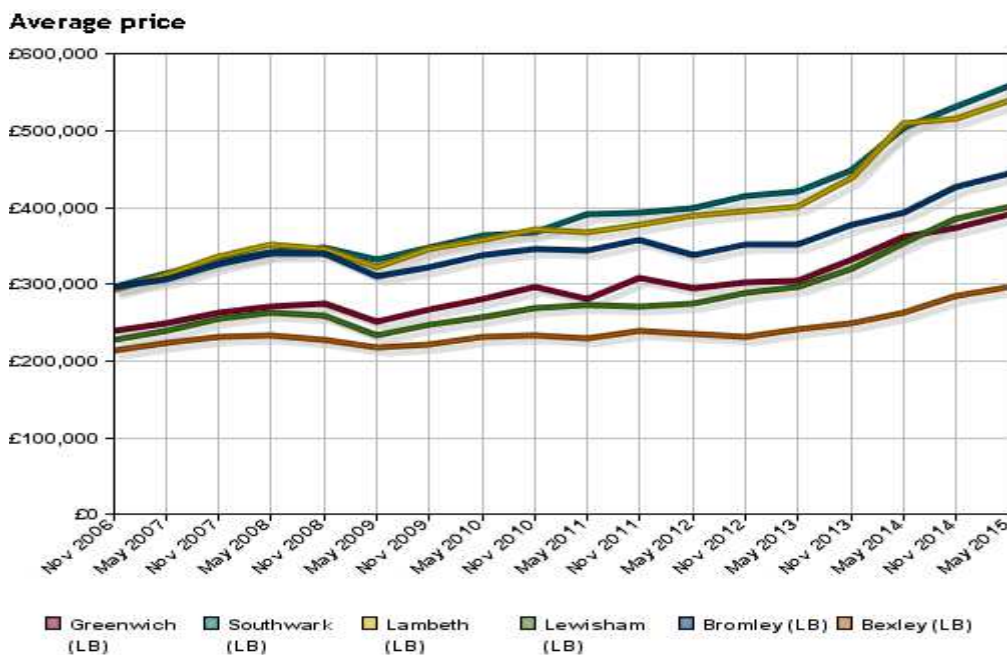
	Area	1 bed flat	2 bed flat	2 bed house	3 bed house	4 bed house
Median	Bexley	150,522	195,510	264,405	311,274	432,681
	Bromley	220,257	293,594	331,006	429,887	626,855
	Greenwich	249,549	318,901	346,549	410,427	618,644
	Lambeth	350,911	437,603	570,675	661,074	1,014,047
	Lewisham	251,921	317,258	380,988	470,934	648,579
	Southwark	351,606	474,282	579,089	712,982	1,022,693
Lower quartile	Bexley	129,500	175,000	232,500	266,063	350,250
	Bromley	195,000	245,000	270,250	342,000	490,000
	Greenwich	177,000	225,000	250,000	295,000	380,000
	Lambeth	270,000	345,000	435,625	475,000	750,000
	Lewisham	201,000	252,000	275,000	377,000	500,000
	Southwark	265,000	340,000	480,000	592,500	835,000

Source: Southwark Market Trends Bulletin, from Hometrack's Real Demand system

¹³ Rightmove House Price Index July 2015

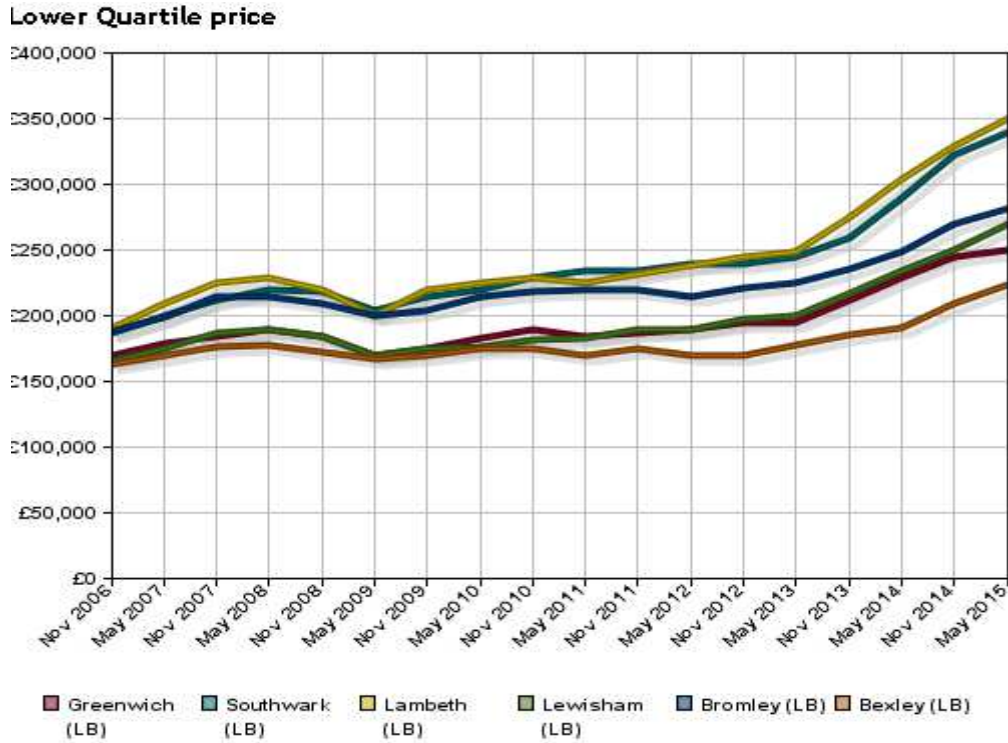
The north of the Southwark borough by London Bridge and the South around Dulwich are the most expensive areas (SE1 and SE11). The least expensive areas in Southwark are the wards of Faraday, Livesey and South Bermondsey. These areas form a belt across the north central part of the borough. The following 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 price changes in South East London and Lambeth, November 2006 – May 2015

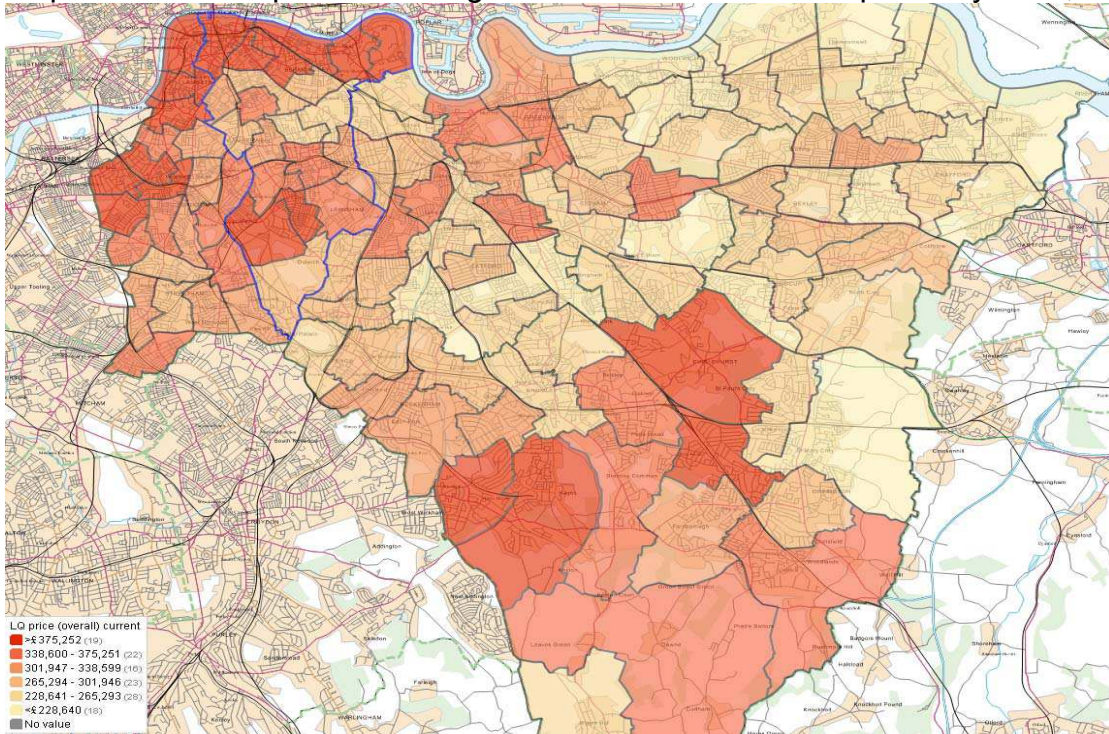


Source: Real Demand (Hometrack)

Chart 3.01d Average price changes in South East London and Lambeth, November 2006 – May 2015



Map 3.01e Lower quartile sub-regional and Lambeth overall prices by ward, May 2015

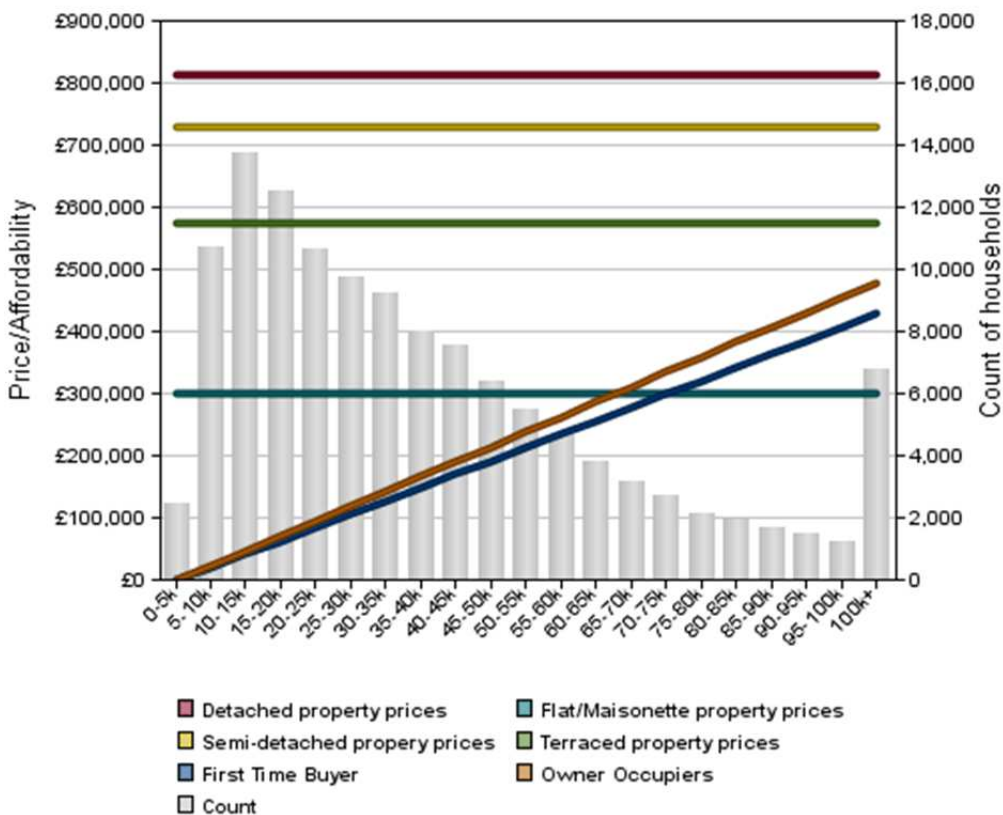


Source: Real Demand (Hometrack)

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 2015



Source: Hometrack Real Demand System, updated August 2015

According to Hometrack’s Real Demand system in June 2015, the house price to earnings ratio in Southwark was 13.6:1 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 12.1:1. Earnings data relates to a single person in full time employment

The lower quartile house price to earnings ratio in Southwark (LB) was 13.9:1. The regional house price to earnings was 12.2:1.

The majority of households have more than one earner. Affordability in Southwark (LB) based on household disposable incomes was 14:1, compared to a regional ratio of 11.2:1. The lower quartile house price to income ratio in Southwark (LB) was 20:1.

The cost of buying an average 2 bed property in Southwark (LB) with an 85% mortgage was £483 per week assuming a 2.59% mortgage rate.

The cost of renting an average 2 bed property in Southwark (LB) was £384 a week.

Table 3.01g Percentage of households priced out of the market in Southwark in June 2015

	Percentage of households priced out of market at		
	3* income	3.5* income	4* income
FTB households - Flats	91.04%	85.62%	83.12%
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	87.79%	83.12%	76.45%
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, realdemand.co.uk, June 2015

Repossessions

In 2014/15 in Southwark 17 households were recognised as being unintentionally homeless and in priority need as a result of mortgage arrears (repossession or other loss of home) compared to 11 the previous year.¹⁴ Because of the credit crunch, it had been anticipated that there would be a sharp increase in the number of households becoming homeless because of repossession. In fact the number of people being repossessed in Southwark has fallen. This is probably partly due to low interest rates.

There has been a significant increase in homelessness due to terminations of assured shorthold tenancies at 199 compared to 78 the previous year.

3.02 Private renting costs

There has been a big increase in the size of the private rented sector in Southwark. In 2001 only 14.8% of the households in Southwark were renting in the private sector. By 2015 this proportion had risen to an estimated 25.7%.¹⁵ 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.

¹⁴ P1E Section E3

¹⁵ Proportions from census 2011 applied to total private sector figure from LAHS 2015

Table 3.02a Advertised monthly private sector rents, July 2015, by property type/size and postcode.

Borough	Size	Lower Quartile	Median	Upper Quartile	Count	Mean
Studio	Studio	1083	1300	1430	57	1338
1	1	1343	1625	1937	700	1743
2	2	1625	1950	2401	929	2211
3	3	1993	2309	2968	354	2792
4+	4+	2600	2968	3467	191	3161

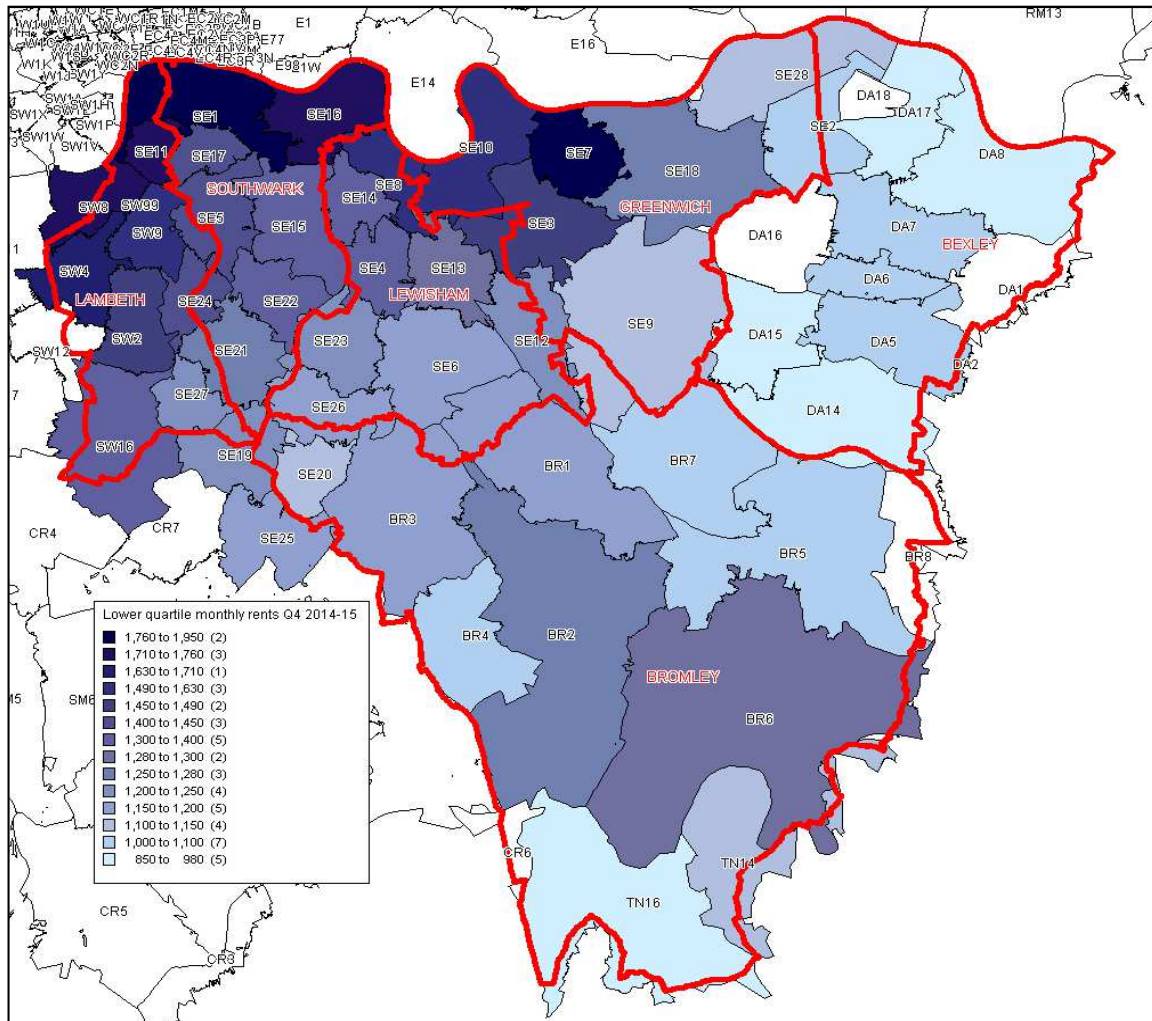
Source: Southwark Housing Market Trends Bulletin July 2015 (based on data downloaded and analysed from Findaproperty.com)

Table 3.02b – The % change in lower quartile and average rents between January 2015 and July 2015

Borough	Type & Size	Lower Quartile % change	Median % change	Q3, 2014/15, Count	Q1, 2015/16, Count
Southwark	Studio	5.7	5.3	77	57
Southwark	1	3.3	1.4	572	700
Southwark	2	-1.3	2.3	801	929
Southwark	3	2.2	-1.3	250	354
Southwark	4+	0.0	6.2	97	191

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, March 2015

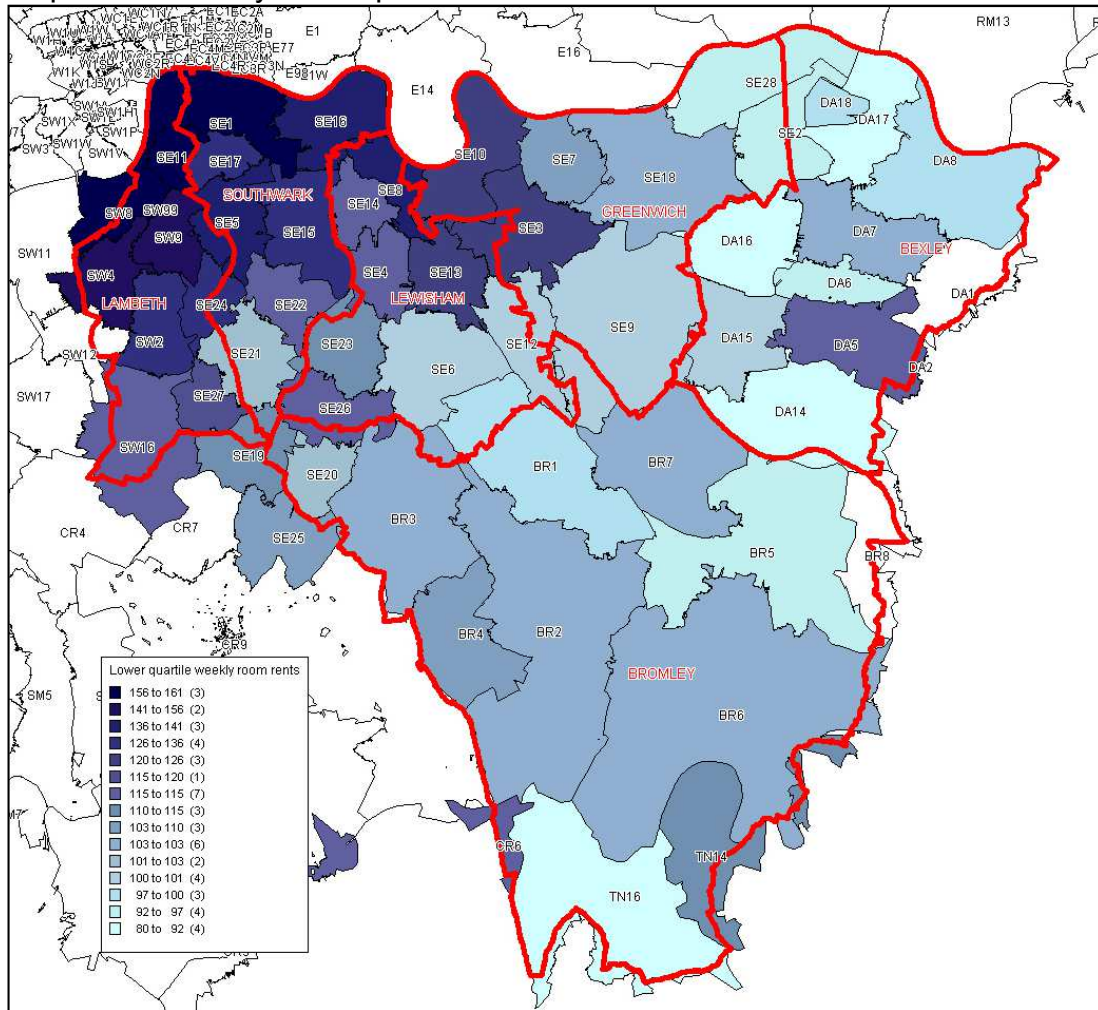


Source: Analysed data downloaded from findaproperty.com

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 2015/16 for single rooms in inner south east London is £95.18 per week and for outer south east London it is £84.27. There is a limited choice for people who need shared accommodation that can be covered solely by housing benefit. In Southwark the lower quartile advertised rent for a shared room in July 2015 was £138 per week and the median was £160.

Map 3.02d Weekly lower quartile room rents in South East London March 2015



Source: Data collected and analysed from Sparrerom.co.uk

3.03 Social housing costs

In 2013/14 the average council rent in Southwark was £96.36 a week.¹⁶ In 2013/14 the average housing association rent was £116.32.¹⁷ In 2014/15 the average weekly council rent was £98.68.¹⁸

¹⁶ Table 702 Rents Lettings and Tenancies: Average weekly rents by district

¹⁷ Table 704 Rents: Private Registered Provider (PRP) rents, by district

<https://www.gov.uk/government/statistical-data-sets/live-tables-on-rents-lettings-and-tenancies>

¹⁸ LAHS 2015

4.0 HOUSING NEED

4.01 Strategic Housing Market Assessment (SHMA)

The South East London Boroughs of Bexley, Bromley, Greenwich, Lewisham and Southwark jointly commissioned Cobweb to conduct a Strategic Housing Market Assessment, which was completed in June 2014. The full report and full explanation of the data is available online at

http://www.southwark.gov.uk/info/200141/housing_strategy/840/housing_statistics

The SHMA found a total annual housing requirement for South East London of 7,188 and an annual affordable housing requirement of 5,017 (over the 2011-2031 period).

For Southwark, partly as a result of the increasing population, Southwark had an estimated net additional dwelling requirement equating to 1,646 new homes each year, of which 799 need to be affordable housing units (over the 2011-2031 period).

Table 4.01a Calculating the overall requirement for new housing

	Bexley	Bromley	Greenwich	Lewisham	Southwark	SE London
Net household growth 2011-2031	17,865	23,813	27,798	30,222	29,588	129,286
Concealed households	1,643	1,614	2,597	2,146	2,331	10,330
Homeless (not in self contained TA)	180	418	139	515	325	1,577
Net additional households requiring housing 2011-2031	19,688	25,845	30,534	32,883	32,244	141,193
Vacancy rate	1.33	1.95	1.96	1.57	2.12	1.81
Net additional dwelling requirement allowing for vacancies 2011-2031	19,950	26,349	31,133	33,399	32,927	143,758
Net additional dwelling requirement per annum allowing for vacancies	997	1,317	1,557	1,670	1,646	7,188

Source: SHMA

Table 4.01b Calculating the affordable housing requirement for new housing

		Bexley	Bromley	Greenwich	Lewisham	Southwark	SE London
Existing need	A: Backlog need	4,785	6,112	10,746	14,085	19,734	55,462
	B: Affordable stock available	779	1,724	3,627	4,620	9,508	20,258
	C: Net current need (A-B)	4,006	4,388	7,119	9,465	10,226	35,204
	D: Backlog reduction period	20	20	20	20	20	20
	E: Annual backlog quota (C/D)	200	219	356	473	511	1,760
New need	F: Newly forming households	1,839	2,659	2,323	3,013	2,829	12,663
	G: % unable to afford market	49%	57%	53%	64%	71%	60%
	H: Newly forming hh in need (F*G)	894	1,508	1,238	1,923	2,020	7,583
	I: Existing hh falling into need	254	226	271	321	212	1,284

	J: Annual newly arising need (H+I)	1,148	1,734	1,509	2,244	2,232	8,867
Final steps	K: Gross annual need (E+J)	1,348	1,953	1,865	2,717	2,743	10,627
	L: Annual supply	512	549	1,031	1,573	1,945	5,610
	M: Net annual need (K-L)	837	1,404	835	1,144	799	5,017

Source: SHMA

The SHMA broke down the affordable housing requirement by bed size and tenure. Overall across the sub region the suggested tenure split was 50% intermediate and 50% social/affordable rent. In Southwark due to the higher proportion of existing social stock the suggested proportion of intermediate was higher at 57% compared to 43% social and affordable rent.

However since the SHMA there has been a significant increase in the right to buy due to increased discounts and there are proposals to extend this to the housing association sector. There is also a proposal to force Local Authorities to sell off their most expensive properties. Therefore Southwark Council believes the social rented proportion should be significantly higher.

The final positions on affordable housing requirements will be included in the New Southwark Plan.

http://www.southwark.gov.uk/info/856/planning_policy/3315/the_new_southwark_plan

Table 4.01c Calculating the affordable housing requirement for new housing

	Tenure	1 bed	2 bed	3 bed	4+bed	Tenure split
Sub-region	Social + affordable rent	-	41%	41%	18%	50%
Sub-region	Intermediate	24%	40%	26%	10%	50%
Southwark	Social and affordable rent	-	27%	46%	27%	43%
Southwark	Intermediate	24%	40%	26%	10%	57%

Source: SHMA

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 2015 there were 12,720 households on the housing register. Just under two thirds of these households are new applicants and just over a third are existing tenants wishing to transfer. The greatest demand based on need 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.

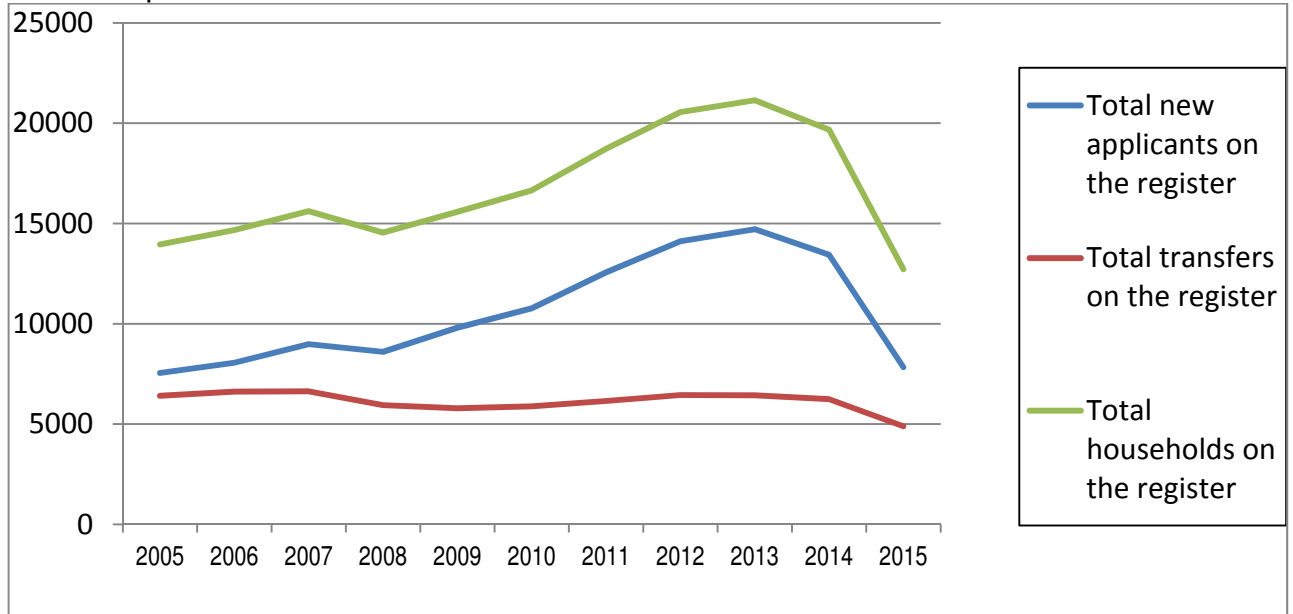
The number of households on the housing register reduced dramatically in 2014/15. This was due to new local qualification criteria to join the housing register and the first review of the housing register in 6 years which removed 10,000 households from the housing register. Some of the reduction was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

Table 4.02a General housing register at April 01 2015

Bedroom need	New applicants	Existing tenants (transfers)	Total
One bedroom	4,340	1,375	5,715
Two bedrooms	2,374	1,660	4,034
Three bedrooms	841	1,306	2,147
Three bedrooms plus	277	547	824
Unknown	0	0	0
Total	7,832	4,888	12,720

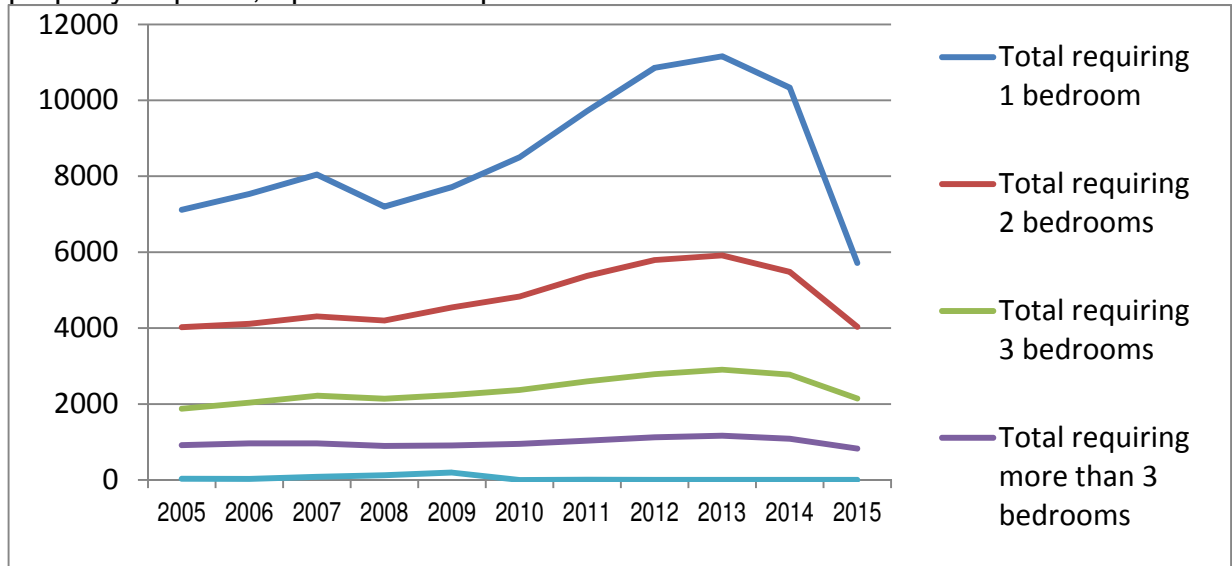
Source: Southwark internal housing data

Chart 4.02b Southwark's housing register broken down by type of applicant April 01 2005 to April 01 2015



Source: Housing Strategy Statistical Appendix, ELASH and LAHS

Chart 4.02c Southwark's housing register broken down by type of applicant and size of property required, April 2005 to April 2015



Source: Housing Strategy Statistical Appendix, ELASH and LAHS

4.03 Homelessness

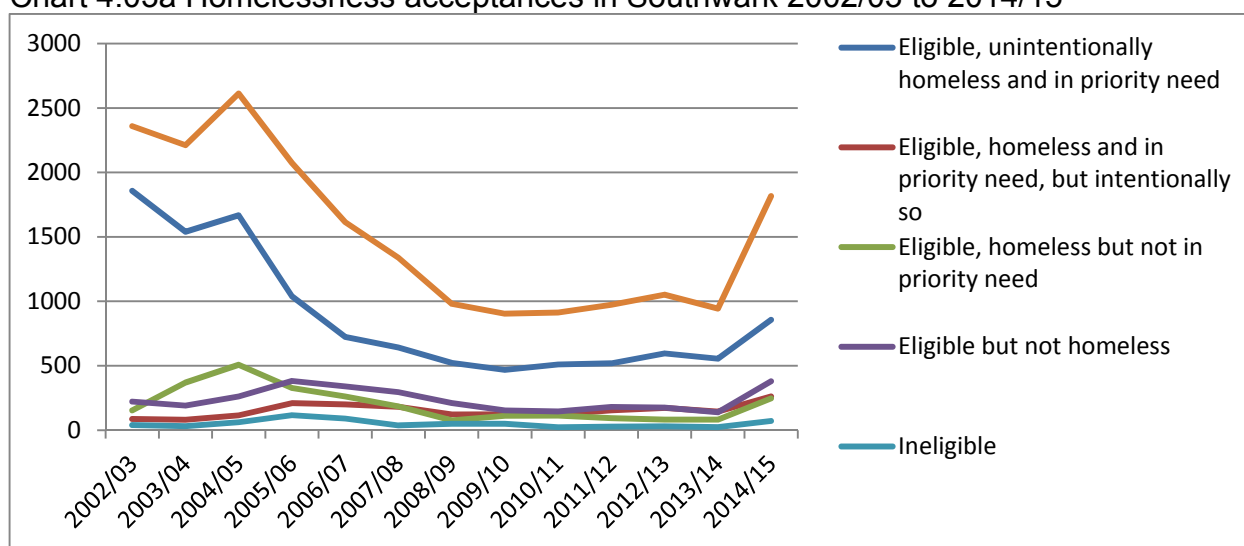
Local authorities have a duty to house homeless households where they are in priority need as defined in legislation, not intentionally homeless, eligible under immigration legislation for housing assistance and have a 'local connection' with Southwark. Homeless households are considered to be in priority need if one of the following applies:

- Have dependant children under the age of 16 or under 19 if in full time education and residing with them
- Contain a pregnant household member
- Have been made homeless as a result of fire, flood or a natural disaster
- Are vulnerable because of old age, disability, or long-term illness or other social reason.

Homelessness Acceptances

In 2014/15 there was a surge in homelessness decisions as the council addressed a backlog of cases. There were 1,817 decisions compared to an average of about 950. There was also an increase in homelessness acceptances to 857 from an average of around 500-600.¹⁹ Of these 684 (80%) either contained dependent children or a pregnant woman.²⁰

Chart 4.03a Homelessness acceptances in Southwark 2002/03 to 2014/15



Source: Housing Strategy Statistical Appendix and P1Es (4 quarters combined)

Following a seven-year decrease from 1991/92, in line with the trend across London, homelessness acceptances in Southwark began to rise in 1998/99. Households accepted as unintentionally homeless and in priority need rose from 1,204 in 1998/99 to 1,857 in 2002/03. In the year 2003/04 this fell to 1,540 but rose again to 1,668 in 2004/05. In 2005 a new lettings policy and choice based lettings was introduced. This was accompanied with a much bigger emphasis on homelessness prevention. As a result the number of homelessness acceptances dropped dramatically to 468 in 2009/10. However since then applications and acceptances have risen slightly each

¹⁹ London Borough of Southwark, Annual P1E Returns

²⁰ London Borough of Southwark, Annual P1E Returns

year (except 2013/14 and massively jumped in 2014/15 as the Council addressed a backlog of cases. This is expected to return back to the trend.

Table 4.03b Applications and acceptances 2012/13, 2013/14 and 2014/15

No of each type of each decision	2012/13	2013/14	2014/15
Eligible, unintentionally homeless and in priority need	595	555	857
Eligible, homeless and in priority need, but intentionally so	172	145	261
Eligible, homeless but not in priority need	81	81	247
Eligible but not homeless	175	139	380
Ineligible	29	23	72
Total decisions	1,052	943	1,817

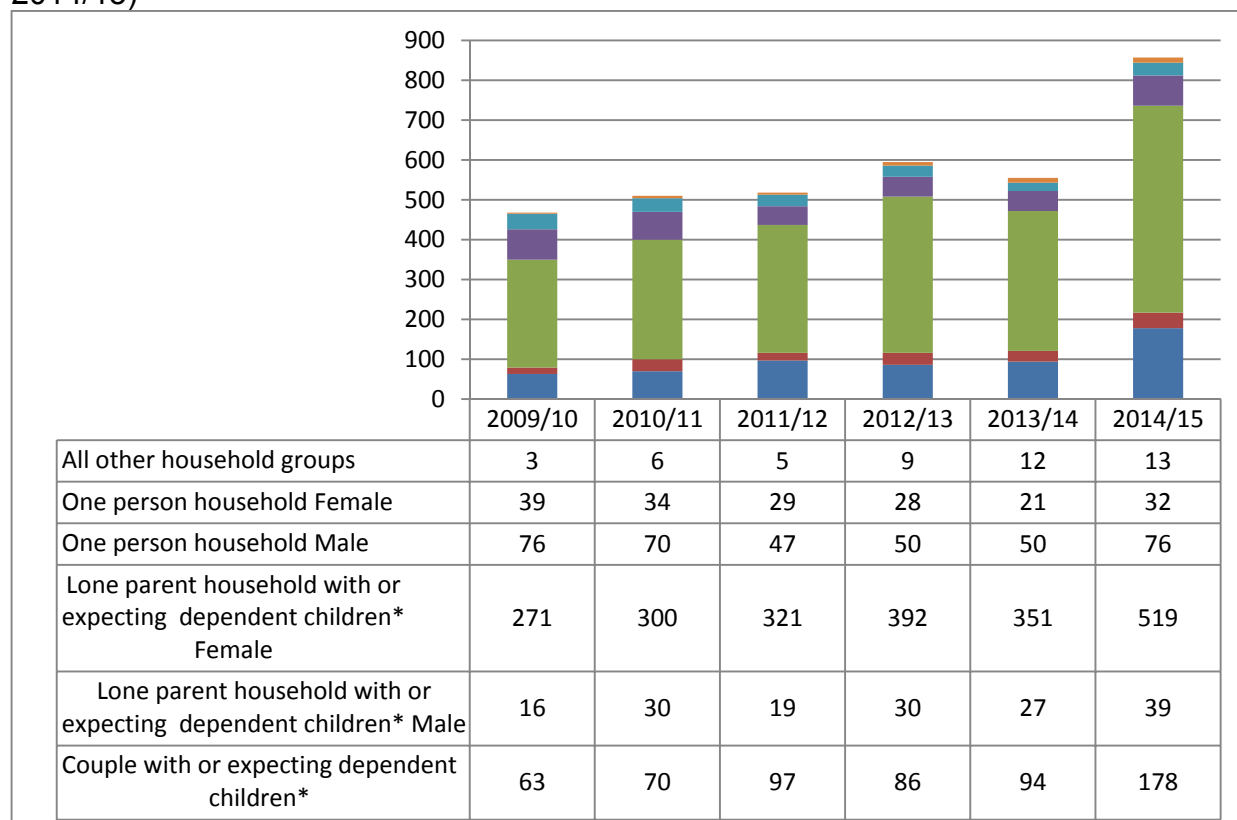
Source: P1E

Table 4.03c Homelessness acceptances in Southwark by ethnicity April 2014/15

	Number	Proportion
White	140	16%
African/Caribbean	361	42%
Indian/Pakistani/Bangladeshi	16	2%
Other Ethnic origin	66	8%
Not stated	274	32%
Total Households	857	100%

Source: P1E 2014/15

Table 4.03d Family or household type of statutorily homeless households (2009/10 to 2014/15)



Source: P1Es

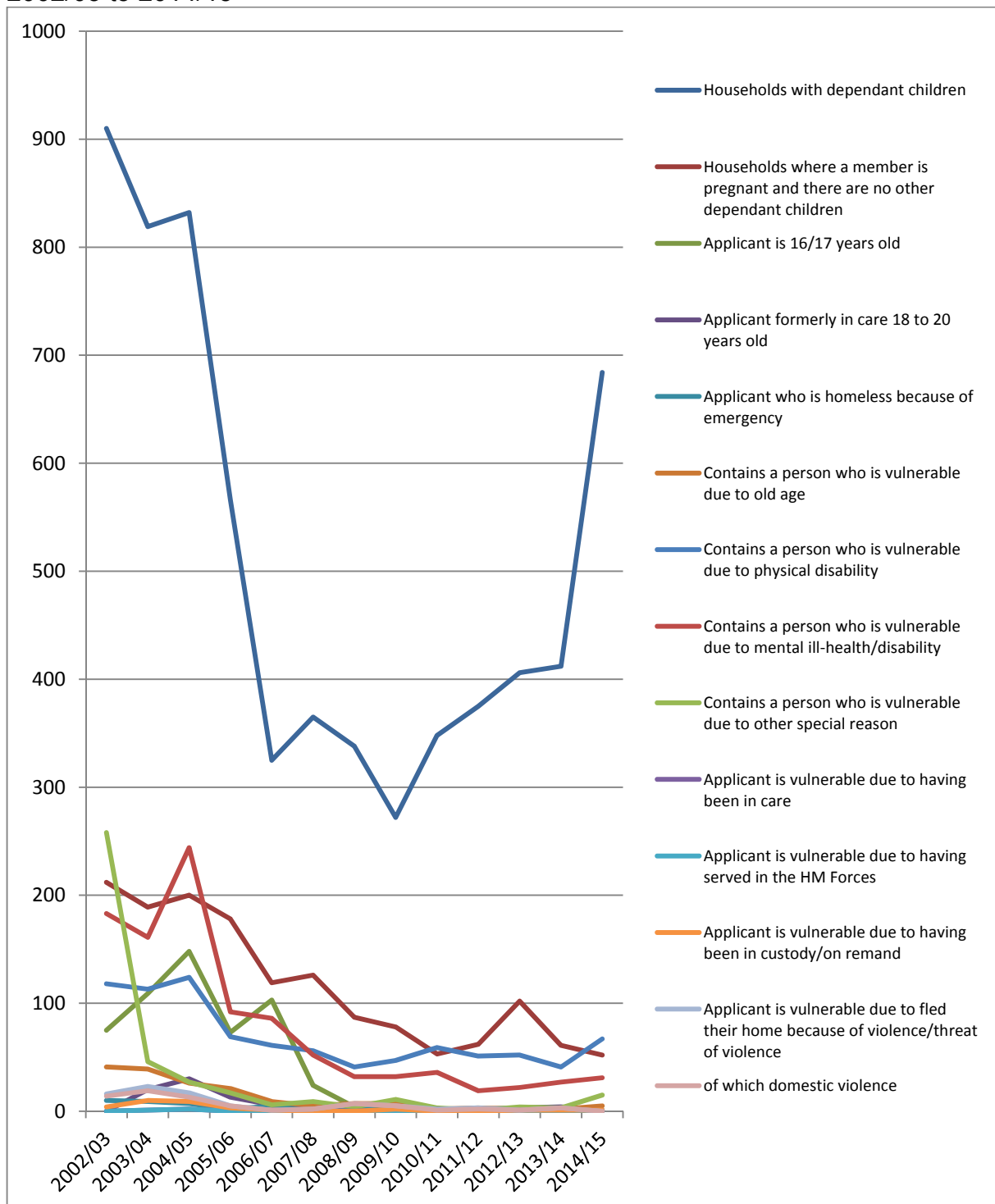
The main reason for homelessness acceptances due to priority need were households containing dependant children at 79.8%, followed by those containing a person who is vulnerable due to physical disability at 7.8%, followed by households containing a pregnant person at 6.1%.

Table 4.03e Homelessness acceptances in Southwark by category of priority need 2014/15

	2014/15	2014/15
Households with dependant children	684	79.8%
Households where a member is pregnant and there are no other dependant children	52	6.1%
Applicant is 16/17 years old	1	0.1%
Applicant formerly in care 18 to 20 years old	1	0.1%
Applicant who is homeless because of emergency	0	0.0%
Contains a person who is vulnerable due to old age	5	0.6%
Contains a person who is vulnerable due to physical disability	67	7.8%
Contains a person who is vulnerable due to mental ill-health/disability	31	3.6%
Contains a person who is vulnerable due to other special reason	15	1.8%
Applicant is vulnerable due to having been in care	0	0.0%
Applicant is vulnerable due to having served in the HM Forces	0	0.0%
Applicant is vulnerable due to having been in custody/on remand	1	0.1%
Applicant is vulnerable due to fled their home because of violence/threat of violence	0	0.0%
Total	857	100.0%

Source: P1E 2014/15

Chart 4.03f Homelessness acceptances in Southwark by category of priority need 2002/03 to 2014/15



Source P1Es

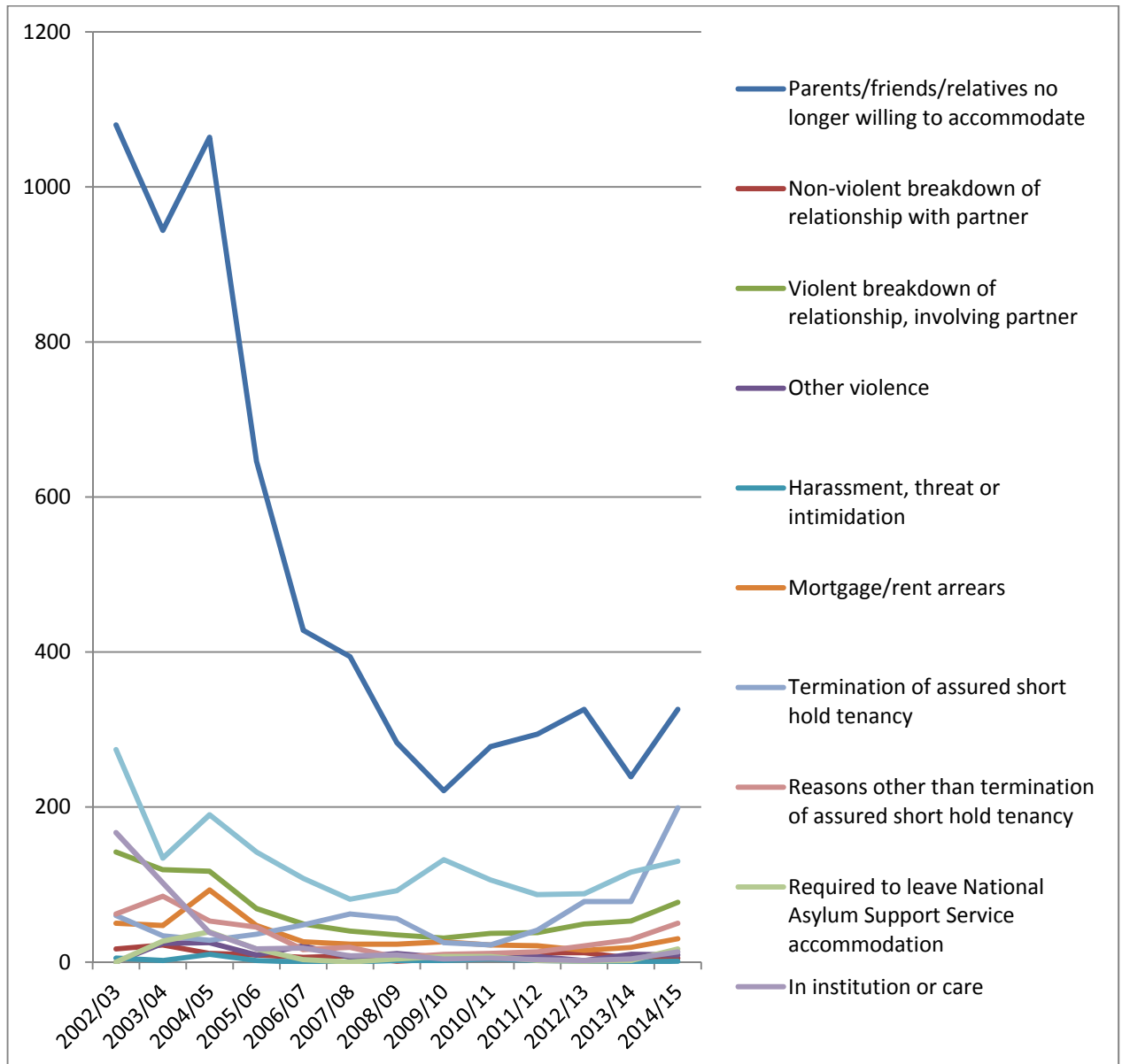
The main reason for loss of the last settled home of those found eligible in 2014/15 was parents/relatives/friends were no longer willing to accommodate them at 326 households. The reason of termination of assured shorthold tenancy rose to 199. This has been increasing for the last few years which is probably due to the impacts of welfare reforms.

Table 4.03g Homelessness acceptance by reason for loss of last settled accommodation 2014/15

Main reason for loss of last settled home for households found eligible	Number	%
Parents/friends/relatives no longer willing to accommodate	326	38%
Non-violent breakdown of relationship with partner	5	1%
Violent breakdown of relationship, involving partner	77	9%
Other violence	9	1%
Harassment, threat or intimidation	1	0%
Mortgage/rent arrears	30	4%
Termination of assured short hold tenancy	199	23%
Reasons other than termination of assured short hold tenancy	50	6%
Required to leave National Asylum Support Service accommodation	17	2%
In institution or care	13	2%
Other	130	15%
Total	857	100%

Source: P1E 2014/15

Chart 4.03h Reasons for loss of last settled home for households found eligible 2002/03 to 2015/15



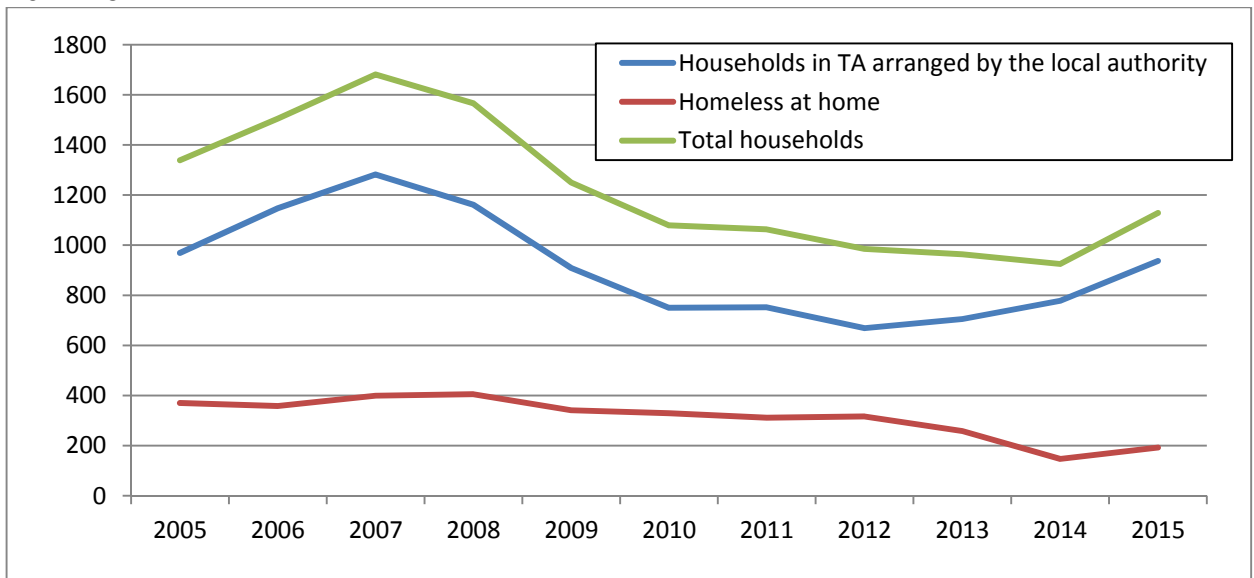
Source: P1Es

Households in temporary accommodation

As a result of the high level of homeless acceptances and the shortage of affordable housing, there are a large number of homeless people living in temporary accommodation. At the 31st March 2015, there were a total of 937 homeless households living in temporary accommodation which had been arranged by the Local Authority, up from 778 the previous year. 845 of these were owned a section 193 duty. A further 92 were awaiting a decision. Of the total 937 households (89%) were households with dependant children and/or a pregnant woman. In total there were 1,331 children/expected children living in temporary accommodation arranged by the local authority.

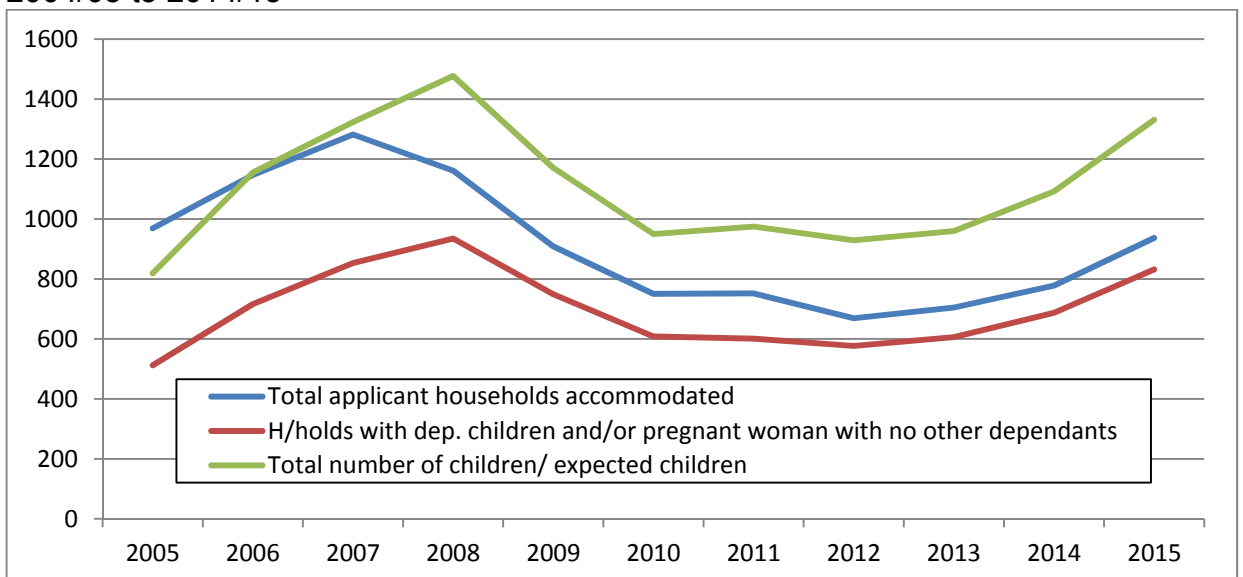
At the end of March 2015 there were 192 households that were “homeless at home.” Homeless at home households have been accepted by the local authority as being owed a duty to be rehoused but are accommodating themselves in the short-term. 72% of homeless at home households contained children/expected children and/or a pregnant woman. In total there were 205 children/expected children living in temporary accommodation the household has arranged.

Chart 4.03i Homeless households in temporary accommodation, Southwark 1999/2000-2014/15



Source: P1E data

Chart 4.03j Children in temporary accommodation arranged by the local authority 2004/05 to 2014/15



Source: P1Es

Table 4.03k The number of homeless households accommodated in each type of temporary accommodation on the 31st March 2015

	Pending enquiries plus intentional homeless, review, appeal, awaiting referral ²	Section 193 Duty owed	Total	H/holds with dep. children and/or pregnant woman with no other dependants	Total number of children/ expected children
1. Bed and breakfast hotels (e.g. privately managed, meal(s) provided, shared facilities)	0	1	1	0	0
2. Other nightly paid, privately managed accommodation (may also be referred to as "Annexes")					
a. Shared facilities	49	40	89	53	86
b. Self-contained (i.e.. Exclusive use of facilities)	22	207	229	204	345
3. Hostel accommodation					
a. Hostels (including reception centres and emergency units)	19	191	210	193	252
b. Women's refuges	0	1	1	1	1
4. Private sector accommodation leased by your authority or leased or managed by an RP (e.g. via HALS or HAMA)	0	72	72	66	117
5. Directly with a private sector landlord (not 2 or 4 above)	1	44	45	41	65
6. Accommodation within your own stock	1	289	290	274	465
7. Accommodation within RP stock	0	0	0	0	0
8. Any other types of accommodation	0	0	0	0	0
9. Total in accommodation arranged by the local authority at the end of the quarter	92	845	937	832	1,331

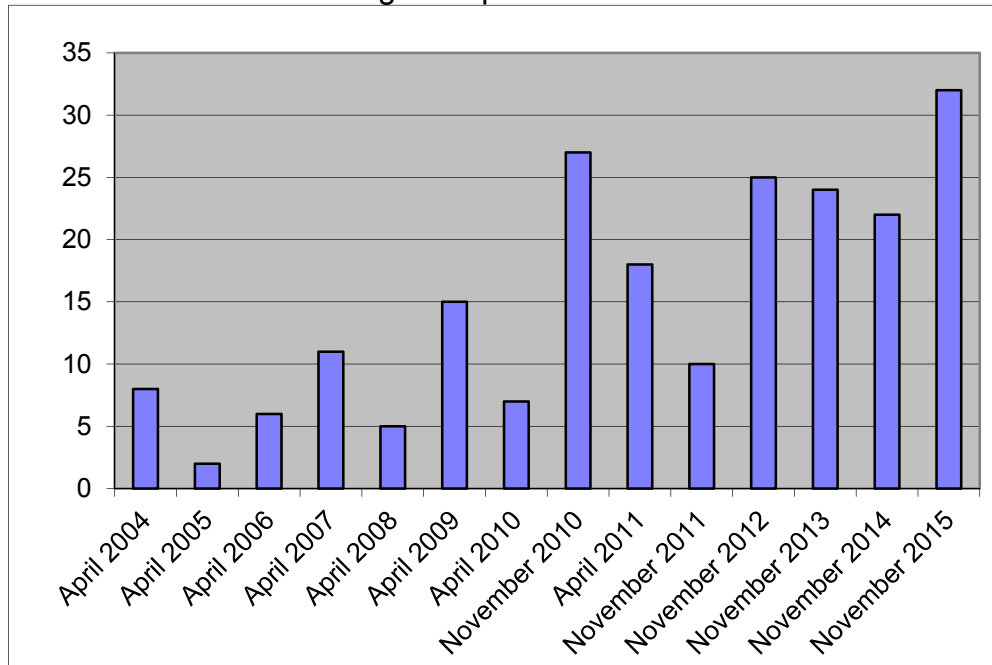
Source: P1E Section E6 as at 31st March 2015

Rough sleepers

In November 2015, 32 rough sleepers were found in the official rough sleeper count, an increase of 10 since November 2014. In the last ten years the number of rough sleepers in the borough has fluctuated and frequently gone over ten. These counts are done to an official government methodology. These figures are thought to be a lower estimate than the actual figure as for safety reasons there are some areas where counters can't go to count. Much of the rise in recent years has been due to arrivals from the A8 and A2 accession states from Eastern Europe. In the November 2015 count, 17 of the 32 were Central Eastern European nationals. Having no recourse to public funds, this group cannot be directed to mainstream street homeless services. Improved partnership working with specialist service providers is required to assist them. An additional 6 were from outside the EU. Southwark also has a significant problem with daytime rough

sleeping, begging, drinking and drug taking on the streets, with hotspots around Camberwell Green and London Bridge.

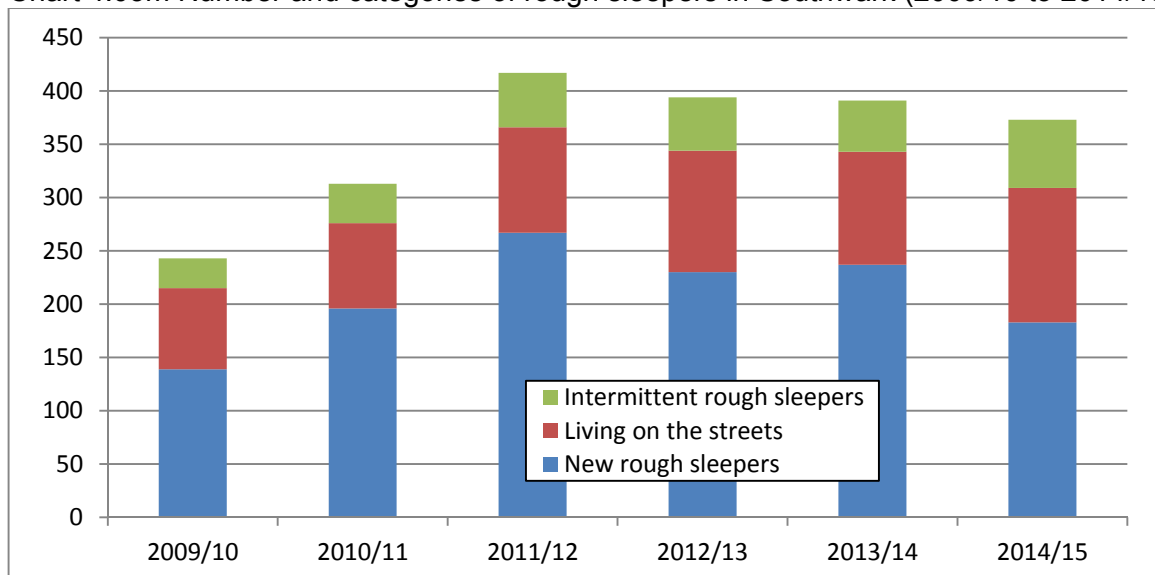
Chart 4.03l Number of rough sleepers in Southwark 2004 to 2015



Source: Southwark official rough sleeper counts
The gaps are not time consistent as November figures are provided from 2010.

While the rough sleeper counts record a snapshot of the number of rough sleepers found on a single night, CHAIN data provides figures for people seen over through the year. Using CHAIN data, in 2013/14 Southwark had the fourth highest level of rough sleepers in London, behind the boroughs of Westminster, Lambeth and Camden. In the same year, Southwark had the fifth highest number of new rough sleepers, behind the same local authorities and Brent council.

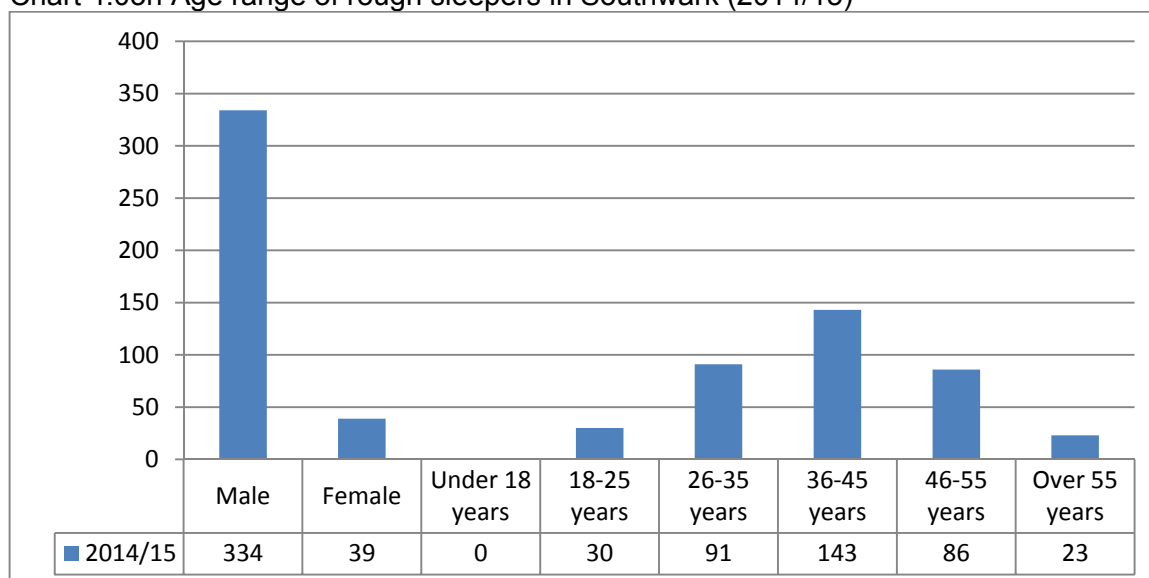
Chart 4.03m Number and categories of rough sleepers in Southwark (2009/10 to 2014/15)



Source: CHAIN reports

The chart below shows the gender and age range of people identified as rough sleepers in Southwark in 2014/15.

Chart 4.03n Age range of rough sleepers in Southwark (2014/15)



Source: CHAIN reports

4.04 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.²¹

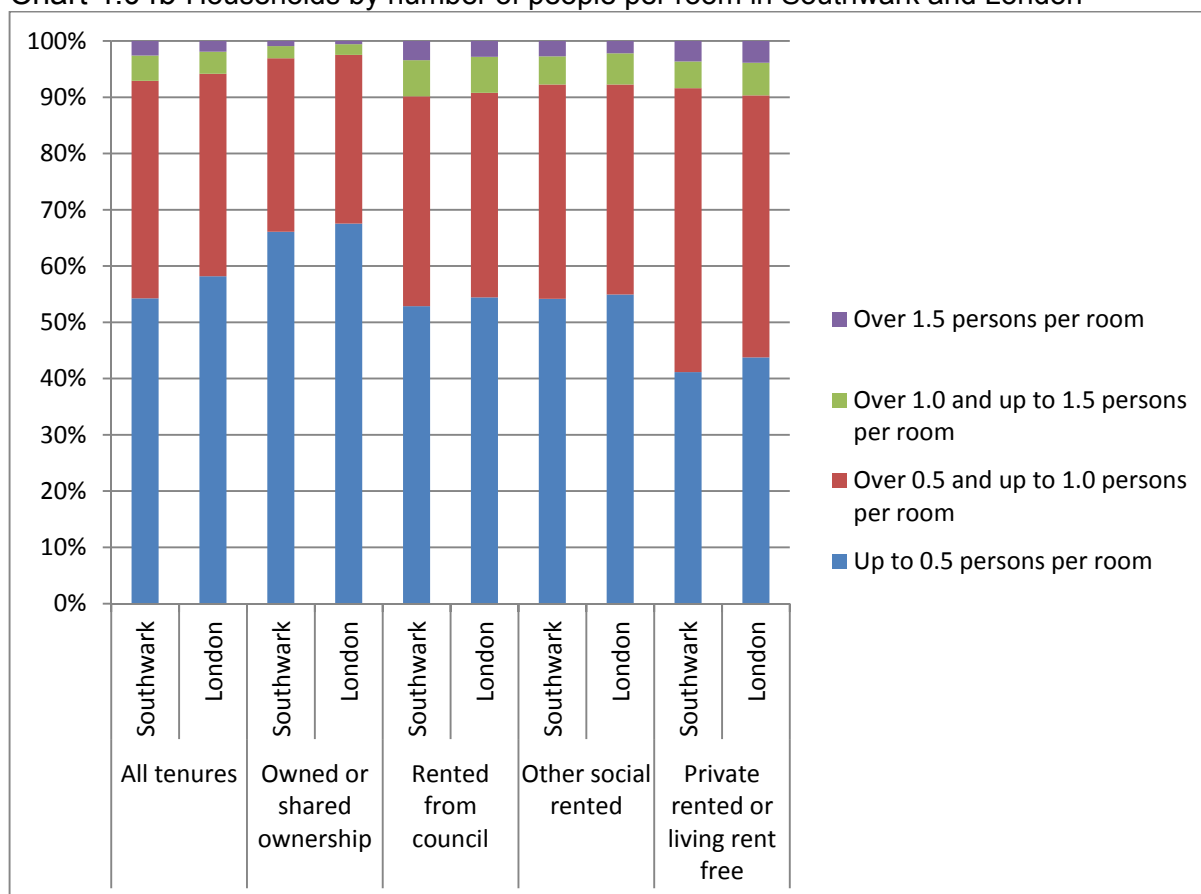
²¹ 2011 Census, Table QS412EW has further detail on definitions.

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

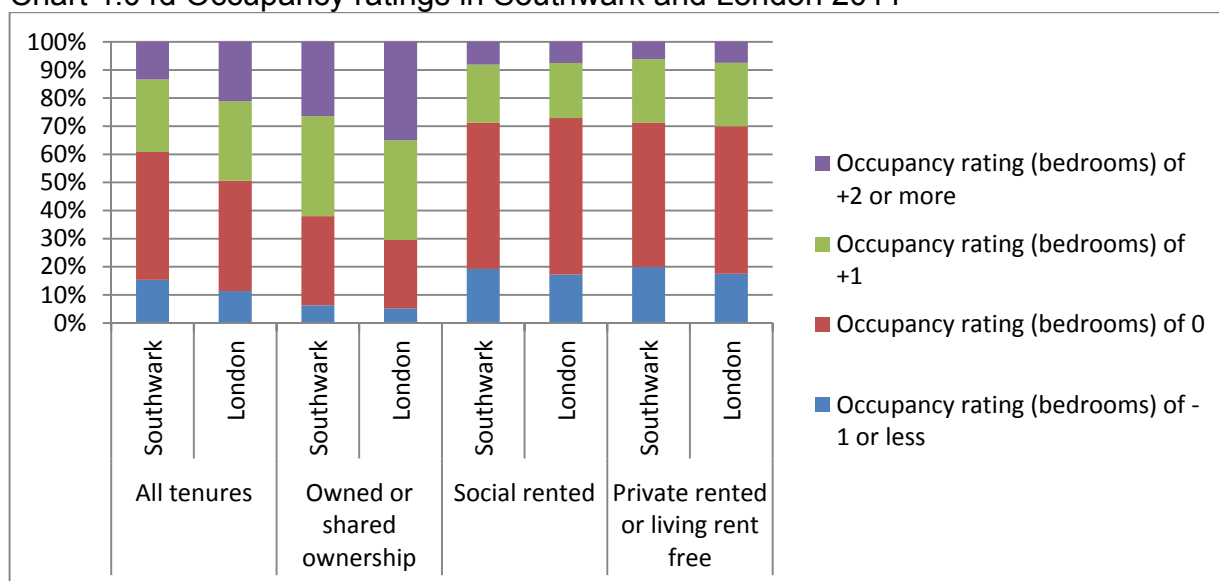
Occupancy ratings are available for households in the social rented sector but not broken down into those renting from local authorities and other social landlords/ An occupancy rating of -1 or less indicates that a household has at least one bedroom too few for the number and composition of people living 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

4.05 Welfare reform

In April 2013 the Government reduced housing benefit for households below the retirement age who are under occupying their social rented property. In April 2013 4,715 households were affected. This has reduced by about 1,500. As of 30th June 2015, 3,222 households were affected, of these 2,267 are council tenants and 955 are other social housing tenants. Of the total 3,222 households affected, 2,479 receive a 14% reduction for 1 extra bedroom and 743 receive a 25% reduction for 2 or more extra bedrooms. The weekly loss ranged from £6.93 to £67.08 and the average loss was £20.70.

A total benefit cap began to be introduced from August 2013. The benefit cap has imposed a limit on the total benefit payable to working age, non-working households (those not in receipt of working tax credit) of £350 a week for single adult households and £500 for couples and lone parent families. Initially the benefit cap is being implemented through deductions made from housing benefit. In the longer term, the cap will form part of the universal credit assessment as this is rolled out by government from October 2013. The Conservatives plan to reduce the benefit cap from £26,000 to £23,000 in London from April 2016.

As of the 30th June 2015 there were 172 households affected by the cap of which 169 were couples and lone parents and 3 were single adults. Of the total 172, 80 were council tenants, 42 were housing association tenants and 50 were private tenants. The range of weekly loss was £0.31 to £351.60. The average weekly loss was £57.27

Source:

http://www.southwark.gov.uk/downloads/download/3561/welfare_reform_in_southwark

2014/15								
General Needs Social Rent PRP	Supported Housing Social Rent PRP	General Needs Affordable Rent PRP	Supported Housing Affordable Rent PRP	General Needs Social Rent LA	Supported Housing Social Rent LA	General Needs Affordable Rent LA	Supported Housing Affordable Rent LA	Total Lets ²
420	386	231	-	1,639	76	-	-	2,752

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
- 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.
- 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).

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

5.01 Social rented lettings

The number of council lettings has dropped slightly over the past few years to 1,801. Over the past ten years it has fluctuated between around 2,400 and 1,800. Of the 1,801 council lettings, 608 were to tenants transferring within the council stock, and there were a further 116 mutual exchanges, so 1,077 were new tenants to social housing. In 2014/15, 447 households accepted Southwark's nomination to housing association accommodation, compared to 581 in 2013/14.

In the housing associations sector in 2013/14 there were 1,272 traditional housing association social rented lettings (including supported) which compares to 1,214 the previous year. This has fluctuated over the past ten years from around 1,700 to 1,150. There were also 177 affordable rent housing association lettings.²²

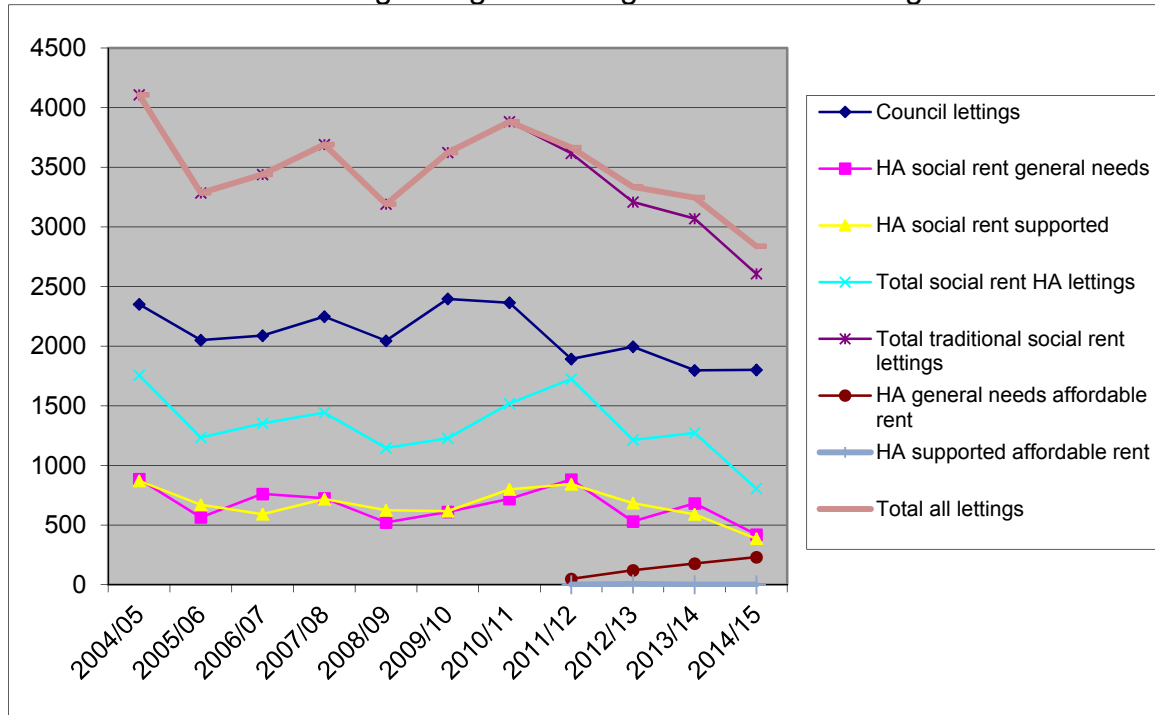
Table 5.01a Social Housing Lettings including tenants transferring 2004/05 to 2014/15

	Council lettings	HA general needs	HA supported	Total traditional social lettings	HA general needs affordable rent	HA supported affordable rent
2004/05	2351	886	871	4108		
2005/06	2051	564	670	3285		
2006/07	2088	761	591	3440		
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

Source: CORE, HSSA, 2004/05 to 2010/11, ELASH 2011/12 and LAHS 2014/15

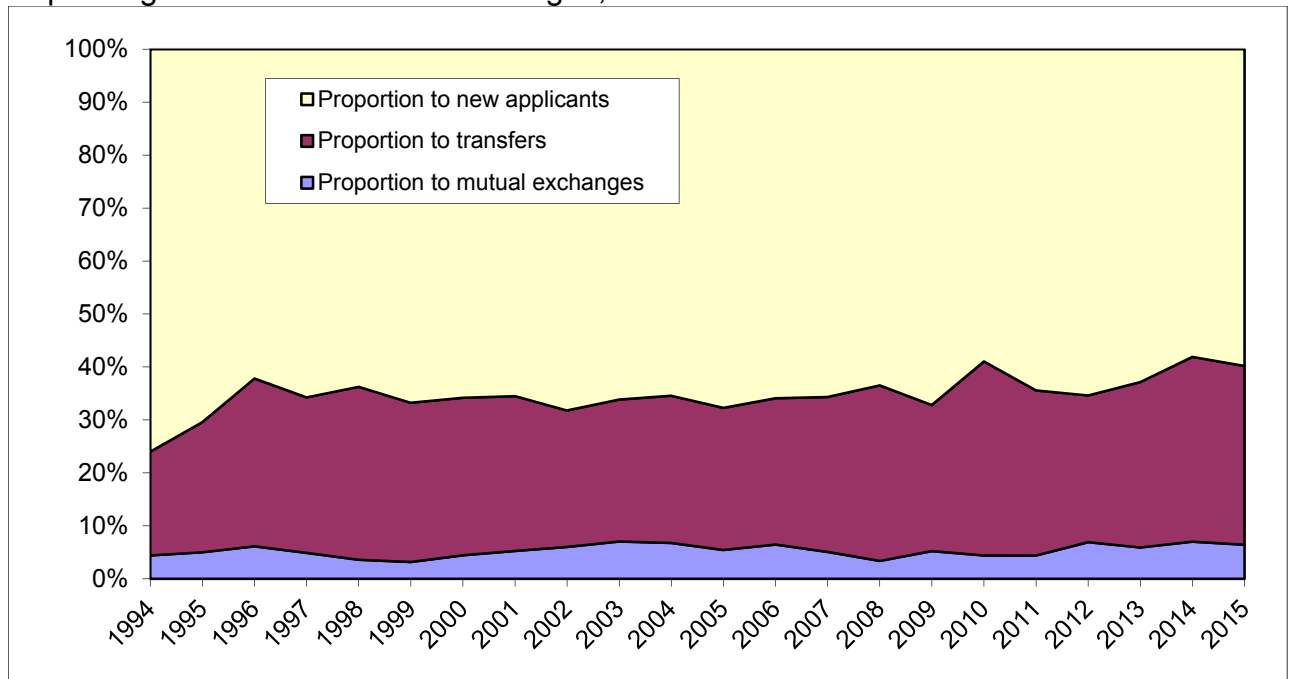
²² <https://www.gov.uk/government/statistics/social-housing-lettings-in-england-april-2013-to-march-2014>

Chart 5.01b Social housing lettings including tenants transferring 2004/05 to 2014/15



Source: CORE, HSSA, 2004/05 to 2010/11, ELASH 2012 and LAHS 2015

Chart 5.01c The proportion of council lettings going to new applicants, tenants requesting transfers or mutual exchanges, 1993/94 to 2014/15



Source: HSSA, ELASH and LAHS

5.02 New supply of affordable housing

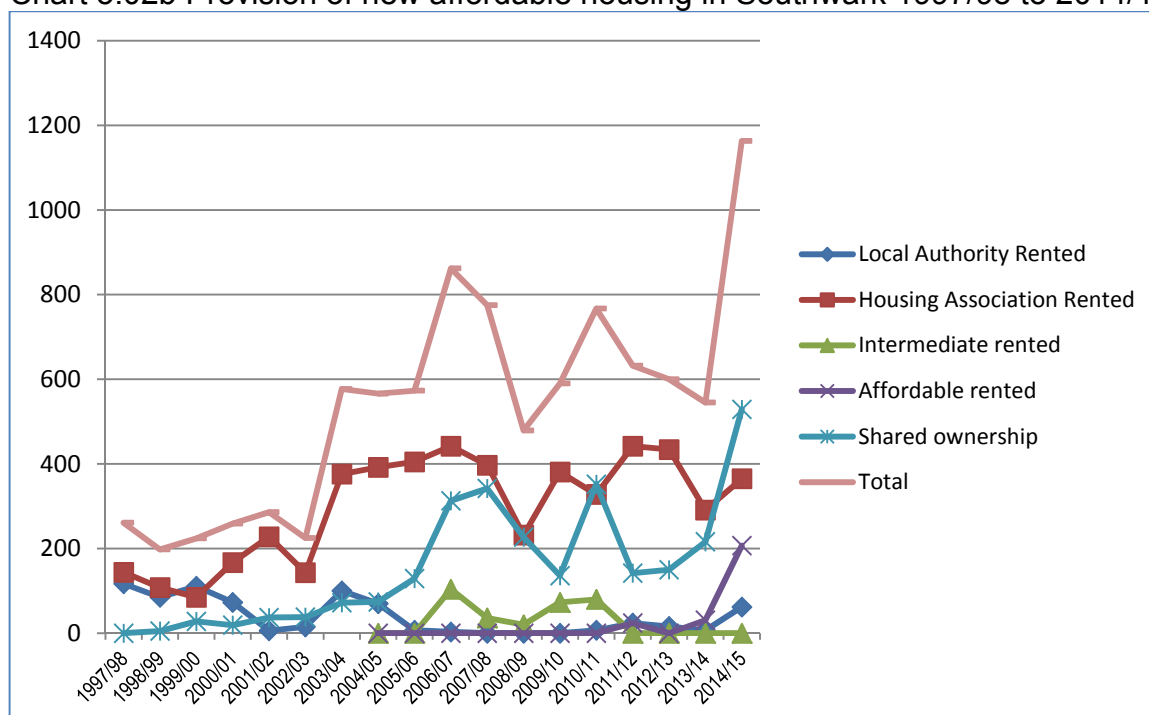
The supply of affordable housing is typically around 600 units a year. In 2014/15 there was 1,163 units due to 2014/15 being the final year of a funding programme.

Table 5.02a New affordable housing in Southwark 2002/03 to 2014/15

New affordable housing	LA rent	HA rent	HA intermediate rent	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		38	0	29	225
2003/04	100	376	0		72	0	29	577
2004/05	70	392	0		74	0	30	566
2005/06	7	405	0		129	0	32	573
2006/07	3	442	104		313	0	0	862
2007/08	0	397	36		342	0	0	775
2008/09	0	232	20		206	21	0	479
2009/10	0	381	73		136	0	0	590
2010/11	7	328	80		352	0	0	767
2011/12	24	442	0	24	142	0	0	632
2012/13	16	434	0	0	150	0	0	600
2013/14	7	291	0	31	216	0	0	545
2014/15	62	365	0	207	529	0	0	1,163

Source: HSSA (2002/03 to 2014/15) and internal data

Chart 5.02b Provision of new affordable housing in Southwark 1997/98 to 2014/15



Source: HSSA (1997/98 to 2010/11) and internal data to 2014/15

Table 5.02c Analysis of the past four year's supply of affordable housing in Southwark by bed size (excluding temporary social housing)

Year completed	Housing Tenure	1-bed	2-bed	3-bed	4-bed	5-bed+	Units
2009-10	Social Rent	111	162	77	28	3	381
2009-10	Intermediate	96	93	19	1	0	209
2009-10	Total	207	255	96	29	3	590
2010-11	Social Rent	71	140	76	3	2	292
2010-11	Intermediate	199	221	12	0	0	432
2010-11	Total	270	361	88	3	2	724
2011-12	Social Rent	80	201	149	36	0	466
2011-12	Affordable rent	6	12	6	0	0	24
2011-12	Intermediate	67	74	1	0	0	142
2011-12	Total	153	287	156	36	0	632
2012-13	Social Rent	122	185	117	21	5	450
2012-13	Affordable rent	0	0	0	0	0	0
2012-13	Intermediate	70	63	17	0	0	150
2012-13	Total	192	248	134	21	5	600
2013-14	Social Rent	45	111	100	40	2	298
2013-14	Affordable rent	10	15	4	2	0	31
2013-14	Intermediate	89	107	20	0	0	216
2013-14	Total	144	233	124	42	2	545
2014-15	Social Rent	65	99	117	35	6	427
2014-15	Affordable rent	46	122	29	10	0	207
2014-15	Intermediate	201	260	64	4	0	529
2014-15	Total	312	481	210	49	6	1,163

Source: Southwark Council Internal Data

Table 5.02d Affordable housing completions planned as of October 2015

Year completed	Social Rent	Affordable Rent	Intermediate	Total
2015-16	320	0	97	417
2016-17	162	51	200	575
2017-18	594	330	626	1,407
Grand Total	1,076	381	923	2,380

Source: Southwark Council Internal Data

Note: These are estimates based on current plans and are likely to change over time as plans are developed. The larger figures in 2017-18 are due to that year being the end of the three year funding programme.