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The Supply and Demand for Supported Housing in London

Final Report for Greater London Authority

July 2026

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Authors: **Professor Christina Beatty and Dr Elizabeth Sanderson**

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Introduction

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Overview

The Greater London Authority commissioned this study from the Centre for Regional Economic and Social Research (CRESR) at Sheffield Hallam University. The same research team previously undertook the **Supported Housing Review 2023**[1] for the Ministry of Housing, Communities and Local Government (MHCLG) and the Department for Work and Pensions (DWP). The national study was published in 2024 and provides an evidence base for the size and composition of supported housing sector in Great Britain in 2023.

The purpose of this study is to provide an up-to-date understanding of the size and composition of the supported housing sector in London, and to estimate future accommodation requirements to inform the London Plan. The Supported Housing (Regulatory Oversight) Act 2023 introduced a new statutory duty for local authorities to understand the local landscape of supported housing, including supply, unmet need, and future requirements, and publish a Local Supported Housing Strategy. This study is, therefore, also intended to support London boroughs in undertaking their own needs assessments to meet the new statutory duty and should be used to complement detailed assessments of local supply and need for services, and local prevalence rates.

The remit of this research is to consider the supported housing sector specifically within London. The purpose is to assess the scale and distribution of **supported accommodation which is designed or designated to come with care, support or supervision to help people who are vulnerable, socially disadvantaged or are disabled to live as independently as possible in the community**. Floating support, which is allocated to an individual rather than integral to supported accommodation provided, is not included in this study. Residential care homes are also beyond the scope of the study.

This study draws on data and methods developed as part of the national study. Whilst a similar approach as the national study is deployed, the research team have advanced the methods further to facilitate sub-national, regional and local authority estimates to be generated. All underpinning data has been updated wherever possible including the integration of the most recent regulatory data on supported housing delivered by Private Registered Providers (PRPs) and Local Authority Registered Providers (LARPs).

This new study benefits from being able to draw on wider data from two bespoke surveys which were undertaken as part of the national study. The first, the Local Authority Commissioner Survey, provides data from local authority commissioners on the local composition of stock across different types of service provision. As well as utilising the dataset

[1] Beatty, C., Bimpson, E, Gilbertson, J., McCarthy, Sanderson, E., and Wilson I. (2024) Supported Housing Review 2023. London: Ministry of Housing, Communities and Local Government and Department for Work and Pensions.

as a whole, the survey has been interrogated to consider the aggregate data for London Boroughs which took part in the survey. Secondly, the Supported Housing Provider Survey, provides data from PRPs with supported housing provision and non-registered supported housing providers. This has been analysed both as a whole and just for the subset of supported housing providers that have provision in London. Each dataset provides insights on the composition of supported housing in London. More details of both surveys are provided in Chapter 2 and the Statistical Appendix A1.

Two further key sources of data are utilised. First, aggregate DWP data from the Single Housing Benefit Extract (SHBE) for London local authorities has been analysed. SHBE of how many are Specified Accommodation claims is not in the public domain. The research team submitted a Freedom of Information request to obtain the data.

In brief, Specified Accommodation includes working age and pension age Housing Benefit (HB) claimants living in supported housing which provides a sufficient level of care, support or supervision to be designated as Specified Accommodation for the purposes of assessing HB claims. A subset of Specified Accommodation is designated as Exempt Accommodation. The eligible rents for Exempt Accommodation continues to be calculated using the pre-1996 Housing Benefit rules and are not subject to local maximum rent restrictions introduced in 1996. Fuller details of the SHBE data and DWP definitions are provided in the body of the report. The SHBE data provides an understanding of the distribution of claimants within supported housing across London to be considered.

Second, the Ministry of Housing Communities and Local Government CORE dataset (Continuous Recording of Lettings and Sales in Social Housing in England) has been analysed. This is an administrative dataset routinely collected by PRPs and LARPs for new lettings in social housing and this includes a subset of data on new tenancies in supported housing. The recently released data for 2024/25 (November 2025) provides information for each local authority within London. This provides valuable insights of the distribution of new lettings and tenant characteristics within each London local authority are provided.

Aims of the study

This study aims to:

- **Analyse and triangulate data** across the sources to understand the composition of supported housing in London.
- Develop a set of **assumptions** for London, Inner London, Outer London as the basis of generating sub-national stock estimates.
- Create **supported housing stock estimates for 2025** for all local authorities within London, Inner London, Outer London, and for London as a whole.
- Estimate stock within **three main types of service provision:**
    - **Transitional Supported Housing**: for people in crisis or with temporary support needs.
    - **Long-term Supported Housing**: for people with long-term or lifelong support care needs.
    - **Older People's Housing**: for people aged 55+ with support or care needs.
- Generate stock **projections of supported housing required by 2030 and 2035.** These estimate the number of supported housing units that would be required to

maintain current rates of provision and account for additional housing need arising from demographic changes. These estimates take into account:

  - ONS 2022 Sub-National Population Projections for local authority areas by 5-year age groups.
  - Prevalence rates for various ‘conditions’ or ‘situations’ associated with population requiring supported housing.
  - Current rates of provision.

- Estimate **un-met need for the three main service types** in 2025. These estimates consider how much additional provision would be required if areas are to raise provision rates on a par with those seen in local authorities in England who are deemed to be meeting local levels of need. The calculations take into account the composition of the local population, current rates of provision and rates of prevalence of various ‘conditions’ and ‘situations’ associated with the need for supported housing.
- Generate projections of **unmet need to 2030 and 2035** given local composition of stock; prevalence of populations at risk; current provision rates; local demography; and ONS Sub-national Population Projections.
- Calculate **overall additional stock needed by 2030 and 2035** if prevalence of conditions remains steady state, current rates of provision are maintained, and unmet need is provided for.

The size and composition of supported housing stock in London

2

Overview

This chapter provides stock estimates for the number of units of supported housing in London available at social rents or affordable rents. The foundation of the estimates are robust regulatory statistics collected by the Regulator of Social Housing (RSH) from Registered Providers (RPs). These include Private Registered Providers (PRPs), such as Housing Associations, who provide their data to the RSH via the Statistical Data Return (SDR). All Local Authority Registered Providers (LARPs) provide their data via the Local Authority Data Return (LADR).

The SDR and LADR collect data on the number of supported housing units within each local authority area for each type of provider. The data is compiled in terms of the number and locations of supported housing units. This includes both self-contained units and bedspaces within non-self-contained units (such as properties shared by more than one tenant or hostel provision). The RSH definition of a supported housing unit is accommodation that is:

- Made available only in conjunction with the supply of support.
- Made available exclusively to households including a person who has been identified as needing that support; **and**
- Falls into one or both of the following categories:
    - Accommodation that has been designed, structurally altered or refurbished in order to enable residents with support needs to live independently.
    - Accommodation that has been designated as being available only to individuals within an identified group with specific support needs.

The regulatory data provides a strong foundation for the stock estimates as RPs own and deliver the vast majority of supported housing. However, additional provision is available from non-registered providers. The latter group are frequently smaller charities or voluntary sector organisations who are not registered with the RSH and are therefore not required to return annual data to RSH for inclusion in the regulatory statistics. The regulatory data has therefore been enhanced with data collected during the MHCLG Supported Housing Review. This includes key source of data collected utilised are the Supported Housing Provider Survey and the Local Authority Commissioner Survey. See Appendix A1 for more details.

These additional sources of information enable the regulatory data to be grossed up on the basis of the survey data to take account of stock held by non-registered providers. In addition, DWP SHBE data on Housing Benefit claimants within supported housing that meets the Specified Accommodation rules is used. This provides valuable insights on provision in local areas which may not be captured in the other data sources. Fuller details of the estimation procedures and assumptions underpinning final stock estimates are outlined below and more detail is provided in the Statistical Appendix A1.

It needs to be remembered there will be additional supported housing which is available at market rents which is not included in these stock estimates. There will also be owner occupier provision which tends to focus on older people's retirement housing options. These alternative sources of provision are generally available to households that are not on a low-income or reliant on support for their housing costs.

In addition, many people with accommodation and support needs receive floating support services. This type of service is not designated to specific supported accommodation and can instead be provided to individuals living in general needs housing. For example, Housing First approaches for homelessness is increasingly shifting in this direction. This means that when an individual moves the support can move with them, rather than been seen as an integral or designated to the specific accommodation. Floating support services are outside the scope of this study and have not been quantified here. Residential care homes for people with higher care needs are not included in this study.

Methods and assumptions

This study refines the original method in the Supported Housing Review to utilise data specifically for London. Full details of the assumptions and steps used to create the estimates are provided in detail in the Statistical Appendix A1. In brief, the current approach uses local authority level regulatory statistics from RPs for 2024/2025 as the base for the stock estimates. An uplift of eight per cent is applied to PRP stock data to account for provision delivered by non-registered providers. SHBE data on the number of Specified Accommodation Housing Benefit claimants is then integrated into the estimates to account for additional working age provision which may be over and above what is expected from the initial stages of the estimation procedure. This study builds on the method that was developed as part of the 2023 Supported Housing Review to produce stock estimates for the MHCLG. Whilst the method deployed here is substantially the same, additional local level SHBE data and regional level survey data have been integrated to allow local authority level estimates rather than national level estimates to be produced. This refinement of the original method enhances the ability of this study to consider the current composition of local supported housing supply as well as future housing requirements at local authority level.

Estimates of supported housing units in London

The estimation procedures allow the total number of supported housing units to be considered for London as a whole, for Inner and Outer London, and for individual local authorities within London. The estimates are based on stock provision in 2025. Table 2.1 indicates that there are estimated to currently be 74,790 supported housing units in London. Of these 34,505 (46 per cent) are in Inner London and 40,285 (54 per cent) are in Outer London. This leads to different current rates of provision in Inner and Outer London which are equivalent to:

- 127 supported housing units per 10,000 people aged 16 or over in Inner London.
- 86 supported housing units per 10,000 people aged 16 or over in Outer London.
- 101 supported housing units per 10,000 people aged 16 or over in London as a whole.

Table 2.1: Supported housing stock estimates, London, 2025

	Supported housing units 2025	Units per 10,000 people aged 16+	Per cent of units 2025
Inner London	**34,505**	**127**	**46%**
City of London	220	152	<1%
Camden	2,490	134	3%
Hackney	3,545	162	5%
Hammersmith & Fulham	1,810	113	2%
Islington	2,355	123	3%
Kensington & Chelsea	2,250	181	3%
Lambeth	4,340	160	6%
Lewisham	3,245	132	4%
Newham	2,060	69	3%
Southwark	2,990	113	4%
Tower Hamlets	2,555	93	3%
Wandsworth	3,210	113	4%
Westminster	3,440	187	5%
Outer London	**40,285**	**86**	**54%**
Barking & Dagenham	1,640	94	2%
Barnet	2,840	88	4%
Bexley	1,630	80	2%
Brent	2,225	78	3%
Bromley	2,755	102	4%
Croydon	3,655	112	5%
Ealing	2,980	95	4%
Enfield	1,375	54	2%
Greenwich	2,820	117	4%
Haringey	3,195	148	4%
Harrow	1,510	69	2%
Havering	1,635	75	2%
Hillingdon	1,420	54	2%
Hounslow	1,540	64	2%
Kingston upon Thames	540	39	1%
Merton	1,260	71	2%
Redbridge	1,640	65	2%
Richmond upon Thames	1,160	73	2%
Sutton	1,965	116	3%
Waltham Forest	2,495	112	3%
London	**74,790**	**101**	**100%**

Source: Sheffield Hallam University estimates

Estimates of supported housing units by service type

There are three main types of service provision within supported housing. These address different needs of tenants both in terms of types of accommodation needed and levels of support required amongst different client groups. Provision within each of these service types tends to be designated to specific client groups. The three main types of service provision are:

- **Short-term/transitional supported accommodation:** intermediate provision for a range of cohorts with support needs with a view to move on towards more independent accommodation. Duration of stay would typically be two years or less (but this isn't a fixed time limit). This may include hostels and transitional housing for people in crisis. There are nine main client groups within this service type including:
    - Single people experiencing homelessness.
    - Families with dependent children experiencing homelessness.
    - Young people leaving care.
    - People at risk of domestic abuse.
    - People with drug or alcohol problems.
    - Prison leavers.
    - Veterans.
    - Refugees and asylum seekers.
    - 'Other' – provision which is deployed flexibly for clients with complex needs which often fall within more than one client group.
- **Long-term supported housing for working age disabled people:** long-term provision for people with a physical disability or long-term mental ill health, and people with a learning disability and/or autistic people or living with other lifelong conditions. This type of provision is often known as "supported living".
- **Housing for older people with care and/or support needs:** supported housing typically designed for and restricted to people aged over 55. This may have different names depending on the design, for example sheltered housing (although much of this comes with very limited levels of care and support), flexible retirement housing, retirement villages, and extra care.

It is possible to calculate stock estimates by service type using a combination of data from the regulatory statistics, the Supported Housing Provider Survey and Local Authority Commissioner Survey. Details of the stages in the estimation procedure are provided in Statistical Appendix A1. In brief, the starting point for the calculations is to estimate the proportion of all stock that is designated as older people's housing. Housing for older people is identified separately by PRPs in the SDR data. In London:

- 63 per cent of PRP supported housing stock in Outer London is older people's housing.
- 43 per cent of PRP supported housing stock in Inner London is older people's housing.
- 53 per cent of PRP supported housing stock in London as a whole is older people's housing.

In addition to PRP housing for older people, approximately 90-95 per cent of LARP supported housing stock in England is older people's housing. The London Boroughs that responded to the Local Authority Commissioner Survey did not record any local authority stock provision for short-term/transitional or long-term provision. However, it should be noted that many local authorities left parts of the responses to these questions, on units for each service type supplied by each provider type, as blank. Possibly this is because the local authority commissioner did not know or were unable to provide a figure, rather than the figure was zero. There may also be some London Boroughs that did not take part in the survey but have local authority stock dedicated to working age provision.

This combination of factors leads to a degree of uncertainty as to whether a small proportion local authority stock is allocated to short-term provision (such a local authority hostels or refuges) or for long-term provision (for people who are disabled or have long-term health conditions) in the 24 London Boroughs that have supported housing stock. Various scenarios were tested to explore the impact of allocating 5-10 per cent of the local authority stock to these service types.

London generally has a higher proportion of social housing than in the rest of England. The 2024/25 LADR indicates that London local authorities have 13,575 units of supported housing in total. If 5 per cent of this provision was allocated to short-term or long-term services then this equates to 680 units. If the proportion rises to 10 per cent then this equates to 1,380 units. Given the higher concentration of social housing in some local authorities compared to others, allocating stock on this basis results in a bigger impact on the working age stock estimates in some areas than others, but has relatively little impact on the older people's housing stock estimates across all local authorities. The estimates for some Boroughs which recorded no short-term or long-term local authority supported housing stock in the Commissioned Survey would also be affected. Instead, all of the LARP supported housing stock in London has been allocated to older people's housing. When London Boroughs carry out their own local housing needs assessments in order to meet the statutory requirements for SHROA, then this assumption can be adjusted accordingly on the basis of local in-depth knowledge.

Combining the PRP and LARP stock on this basis indicates that the proportion of all supported housing in London that is for older people's housing is:

- 69 per cent of all supported housing stock in Outer London is older people's housing.
- 50 per cent of all supported housing stock in Inner London is older people's housing.
- 60 per cent of all supported housing stock in London as a whole is older people's housing.

The remaining stock (i.e. not older people's housing) is allocated to service types using a similar approach as that taken in the 2023 Supported Housing Review. The calculations primarily draw on the distribution of stock by client group reported in the Provider Survey and the Commissioner Survey (see Statistical Appendix A1 for details). The survey data indicates that approximately 60 per cent of provision for working age client groups in England is for short-term/transitional supported accommodation and 40 per cent is for long-term supported housing for working age disabled people. In the national Supported Housing Review the 60:40 ratio is used in conjunction with stock estimates to calculate the number of units in the remainder of the stock (i.e. total stock minus older people's housing) that falls within each service type.

In this study, the method has been refined to be more attuned to what is known at the local level. This includes the survey data for London respondents and the higher rates of statutory homelessness in London which requires more short-term provision. The combined information available allowed various scenarios and ratios to be tested reflecting local housing composition and need across London. The final ratios arrived at were validated through a comparison with individual London Borough survey data which indicate the assumptions hold. For Inner London local authorities this results in 80 per cent of the working age stock being allocated to short-term provision and 20 per cent allocated in long-term provision. In Outer London Boroughs with higher-than-average rates of statutory homelessness the split is 70:30. In Outer Boroughs with lower-than-average statutory homelessness rates the split is 60:40 as is used for the rest of England in the Supported Housing Review.

Table 2.2 provides the 2025 stock estimates for London split by the three main service types.

Table 2.2: Supported housing stock estimates by service type, London, 2025

	Older People units	Short-term units	Long-term units	Total units	Older People %	Short-term %	Long-term %	Total %
Inner London	**17,290**	**13,775**	**3,445**	**34,505**	**50**	**40**	**10**	**100**
City of London	200	15	5	220	91	7	2	100
Camden	1,025	1,170	295	2,490	41	47	12	100
Hackney	1,955	1,270	315	3,545	55	36	9	100
Hammersmith & Fulham	590	975	245	1,810	33	54	13	100
Islington	875	1,185	295	2,355	37	50	13	100
Kensington & Chelsea	1,280	780	195	2,250	57	35	9	100
Lambeth	2,355	1,590	400	4,340	54	37	9	100
Lewisham	1,330	1,535	385	3,245	41	47	12	100
Newham	1,025	830	205	2,060	50	40	10	100
Southwark	1,470	1,220	305	2,990	49	41	10	100
Tower Hamlets	1,135	1,140	285	2,555	44	45	11	100
Wandsworth	2,015	955	240	3,210	63	30	7	100
Westminster	2,045	1,115	280	3,440	59	32	8	100
Outer London	**27,855**	**8,330**	**4,095**	**40,285**	**69**	**21**	**10**	**100**
Barking & Dagenham	1,200	265	175	1,640	73	16	11	100
Barnet	2,090	525	225	2,840	74	18	8	100
Bexley	1,455	105	70	1,630	89	6	4	100
Brent	1,130	820	275	2,225	51	37	12	100
Bromley	2,165	355	235	2,755	79	13	9	100
Croydon	2,335	925	395	3,655	64	25	11	100
Ealing	1,920	635	425	2,980	64	21	14	100
Enfield	765	430	185	1,375	56	31	13	100
Greenwich	1,810	705	305	2,820	64	25	11	100
Haringey	2,275	645	275	3,195	71	20	9	100
Harrow	1,230	170	110	1,510	81	11	7	100
Havering	1,285	210	140	1,635	79	13	9	100
Hillingdon	830	415	175	1,420	58	29	12	100
Hounslow	1,130	285	125	1,540	73	19	8	100
Kingston upon Thames	230	230	75	540	43	43	14	100
Merton	830	255	170	1,260	66	20	14	100
Redbridge	1,270	220	150	1,640	77	14	9	100
Richmond upon Thames	905	150	100	1,160	78	13	9	100
Sutton	1,525	265	175	1,965	78	13	9	100
Waltham Forest	1,470	715	305	2,495	59	29	12	100
London	**45,145**	**22,105**	**7,540**	**74,790**	**60**	**30**	**10**	**100**

Source: Sheffield Hallam University estimates

Table 2.2 indicates that in London there are:

- 45,145 units of older people's housing (60 per cent).
    - A higher proportion of stock in Outer London is older people's housing (69 per cent).
    - A lower proportion of stock in Inner London is older people's housing (50 per cent).
- 22,105 units of short-term/transitional provision (30 per cent).
    - Transitional provision accounts for a higher proportion of stock in Inner London (40 per cent).
    - Transitional provision accounts for a lower proportion of stock in Outer London (21 per cent).
- 7,540 units of long-term provision (10 per cent).
    - This percentage varies across local authorities, but overall long-term provision accounts for 10 per cent of stock in both Inner and Outer London.

Maintaining provision rates in the future

3

Overview

This chapter builds on methods developed in the Supported Housing Review to consider the scale of supported housing stock needed in 2030 and 2035 if current rates of provision are to be maintained and demographic trends are taken into account. The potential scale of the future need for supported housing depends on a number of factors including:

- The underlying population structure within each area.
- ONS population projections to 2035.
- The prevalence of 'conditions' or 'situations' which indicate the scale of the potential population who may require supported housing.
- Local provision rates.

The aim of this chapter is to estimate how many units within each service type are needed if provision rates are maintained at current levels, prevalence rates remain stable and ONS population projections materialise. It should be noted that the projections are estimates and not actual forecasts about need. Forecasting methods would require more detailed data to be available on long-term trends leading up to this point in time. For example, what has been the trend or trajectory of prevalence rates and provision rates in different types of area up until now, and what would happen if these trends continued over time. Projections are instead based on a given set of assumptions or scenarios based on the current situation. For example, it is assumed that current prevalence rates and provision rates will continue at a steady state from this point until 2035 and these are applied to the ONS population projections which are predicted to change over time.

As with any projections, these are based on, and sensitive to, specific assumptions and simulation of trends. The assumptions underpinning the projections relate to the existing supply of supported housing, the current prevalence of certain conditions in the population with potential need for care, support or supervision, and future demographic trends. The projections do not account for a full range of factors that will affect future need including: the impact of future policy direction including in relation to the welfare system, health system or affordable housing provision; developments in care delivery models; trends in ill-health; and the health of the economy.

Methods and assumptions

The approach used here follows a similar method undertaken by Wittenberg and Hu (2017)[2] in their study for the then Department for Communities and Local Government, and the Department of Health. The method was updated and deployed by the CRESR research team for the 2023 Supported Housing Review. The projections presented here for London take the estimates of supported housing stock developed in Chapter 2 as their starting position. All underpinning data used to inform the projections has also been undated where possible.

The projections estimate the number of supported housing units that would be required if current rates of provision are to be maintained and additional demand arising from demographic changes are taken into account. The underpinning data on prevalence, provision rates and population projections have been enhanced by integrating local data where possible. For example, local authority level Statutory Homeless data has been integrated into the estimates to provide a local authority specific assessment of the prevalence of homelessness. This informs the estimates for the need for short-term/transitional supported housing at a local level.

First, the ONS Subnational Population Projections (2022 based) have been compiled for each individual local authority by 5 year age groups for 2025, 2030 and 2035. This allows the underpinning structure of each area to be taken into account when calculating population change over time, and prevalence and provision rates (see below). This is an important component in the updated calculations as the ONS made several important revisions to the assumptions underpinning their 2022 based population projections compared to the 2020 based projections used in the 2023 Supported Housing Review.

The population projections indicate that Inner London has a younger age profile that Outer London (73 per cent are working age compared to 67 per cent in Outer London). Outer London is more similar to the national average of 63 per cent of people being of working age. There is limited population growth predicted for the working age population in Inner London (3.4 per cent) which is similar to the to 3.3 per cent predicted nationally and higher than for Outer London (1.9 per cent). Indeed, some of the working age groups are predicted to shrink or remain static between 2025 and 2030 (and by 2035) for both Inner and Outer London. These patterns will be magnified at the local authority level compared to the average seen at an aggregate sub-regional level.

The over 65 year age group is increasing rapidly everywhere, but in some places more than others. This has a bearing on how much older people's housing might be needed in the future. In Outer London, the 65+ age group is estimated to increase by 21 per cent from 2025 to 2035 (similar to England 20 per cent) but in Inner London the projected increase is 32 per cent.

Second, prevalence rates are calculated based on proxies which estimate the population in each local authority with certain 'conditions' or characteristics. Each individual area population structure and projections feed into the calculation of the denominator for the prevalence rates and the populations they are applied to. The proxies have been chosen to reflect 'conditions' or 'situations' that are common to residents living within various categories of supported housing. Details of the underpinning data sources for 'conditions' or 'situations' considered are provided in the Statistical Appendix A1.

[2] Wittenberg, R. and Hu, B. (2017) Projecting demand for supported housing in Great Britain, 2015 to 2030. PSSRU Discussion paper 2931. London: London School of Economics.

The following section summarises the prevalence of ‘conditions’ or ‘situations’ used to derive proxy at risk populations some of whom may require supported housing and how this relates to each type of service provision:

- **Short-term/transitional provision** of supported housing for the main client groups listed below. Sometimes provision may be ringfenced to a particular client group or used flexibly across client groups with multiple or complex needs. All the proxy populations at risk are summed together to arrive at the scale of the overall population who may potentially require transitional supported housing:
  - **People experiencing homelessness**
    - **Proxy at risk population**: Local authority level data on Statutory Homeless people owed a Duty of Relief due to being homeless expressed as a percentage of local population aged 16-64[3]. This group includes those who may be allocated provision categorised as single homeless, families homeless, prison leavers, veterans, refugees and asylum seekers, and ‘other’. **Source:** MHCLG Statutory Homeless Statistics, April 2024-March 2025.
  - **Young people leaving care**
    - **Proxy at risk population**: National level data on the number of care leavers aged 16 to 25 by single year of age expressed as a percentage of each age group. **Source:** Department for Education: Children looked after in England including adoptions, reporting year 2025.
  - **People at risk of domestic abuse**
    - **Proxy at risk population**: National rates of domestic abuse in the last year among people aged 16 -64 years by five-year age groups expressed as a percentage of each age group. **Source:** ONS Crime Survey for England and Wales, year ending March 2024.
  - **People with drug or alcohol problems**
    - **Proxy at risk population**: National rates of drug dependency in the last year among people aged 16-64 by five-year age group expressed as a percentage of each age group **PLUS** national rates of alcohol dependency in the last year among people aged 16 -64 by five-year age groups expressed as a percentage of each age group. **Source:** NHS England Adult Psychiatric Morbidity Survey: Survey of Mental Health and Wellbeing, England, 2023/24.
- **Long-term provision** of supported housing for people with severe and long-term mental health conditions, people with a learning disability and/or autistic people, and people with a physical disability or sensory impairment. All the proxy populations at risk are summed together to arrive at the scale of the overall population who may potentially require long-term supported housing:
  - **People with severe and long-term mental health conditions**
    - **Proxy at risk population**: National prevalence of severe symptoms for mental health conditions (CIS-R score) for 16-64 year olds by five-year age bands expressed as a percentage of each age group. **Source:** NHS

[3] The 2024/25 Statutory Homeless Statistics have missing data for a small number of local authorities. In these instances, the figure has been estimated on the basis of the most recent local authority data available for the area increased by the average percentage increase in homelessness in London over the intervening period.

        - England Adult Psychiatric Morbidity Survey: Survey of Mental Health and Wellbeing, England, 2023/24.
    - **People with a learning disability and/or autistic people**
        - **Proxy at risk population**: National data on the prevalence of people aged 16-64 with complex or severe learning disability likely to be eligible for adult social care by five-year age bands expressed as a percentage of each age group. **Source:** The Centre for Disability Research (CeDR) at Lancaster University (Emerson and Hatton, 2008) [4] provides estimates of the population with learning disabilities and projections of change over time.
    - **People with a physical disability or sensory impairment**
        - **Proxy at risk population**: National data on the prevalence of serious physical disability for people aged 18-64 by five-year age bands expressed as a percentage of each age group. **Source:** PANSI data **(**Projecting Adult Needs and Service Information), The Institute of Public Care, Oxford Brookes University.

- **Older people's housing for people with care and/or support needs.** Supported housing typically designed for and restricted to people aged over 55. It is assumed that the majority of this housing is allocated to people aged 65 and over.
        - **Proxy at risk population**: National data on the prevalence of population aged over 65 years old who are not living in communal establishments (such as care homes and hospitals) and need support as they are unable to perform domestic care tasks (instrumental activity of daily living) and/or have difficulty performing personal care tasks (activity of daily living). The prevalence rates are calculated by five-year age bands and expressed as a percentage of each age group. **Sources:** Health Survey for England 2024 and 2021 Census.

It needs to be remembered that not all of the proxy population at risk (indication of prevalence) will require supported housing. Some may have family who are able to support or care for them at home. Others will have the financial means (such as the ability to buy a retirement property which provides support) to facilitate their own accommodation and support package. Others may require accommodation, but not with the level of support provided by supported housing. For this latter group, general needs housing with or without floating support may be the best option.

To take this local variation into account a **third step to calculate current provision rates** is required. This provision rates are based on the estimated number of units in each client group relative to the potential population at risk. This last stage takes account of the fact that not all of the local population 'at risk' will require supported housing. The local context needs to be borne in mind when interpreting provision rates. In more deprived local authorities, a higher provision rate relative to the population at risk may reflect lower rates of owner occupation and a greater proportion of the population more generally relying on social housing provision. The composition of the statutory homeless in the local area can also lead to higher or lower provision rates. For example, in areas with a higher proportion of single homelessness or rough sleepers a greater proportion of statutory homeless may require supported housing. In areas where families make up a bigger proportion of the statutory homeless, then these families may primarily require stable affordable housing rather than supported housing leading to lower local provision rates.

[4] Emerson, E. & Hatton, C. (2008) People with Learning Disabilities in England. Lancaster: Lancaster University, The Centre for Disability Research (CeDR).

The supported housing need projections therefore estimate the number of supported housing units that would be required if current rates of provision are to be maintained; if additional need for supported housing arising from demographic changes are taken into account; and prevalence rates remain constant. This involves all three steps outlined above for each of the main client groups of supported housing considered. First, the local five-year local population structure and projected population change over time are compiled. Second, the current rates of prevalence by age based on proxies for populations 'at risk' are calculated for each of the main client groups and then applied to the projections of local population structure over time. Finally, the local current provision rate is then applied to estimate how much of the proxy population at risk generally require supported housing provision. These estimates account for local population growth over time, assume prevalence of conditions remains at steady state, and that current provision rates are maintained in the future.

Estimates of supported housing units required to maintain current rates of provision

Table 3.1 provides details of short-term transitional stock required in Inner London, Outer London and London as a whole from 2025 to 2035. These estimates maintain current provision rates, account for prevalence rates, and build in local population structure and population projections over time. An assumption has been made that even if population projections decrease slightly in any individual local authority area during each of the five-year periods then stock levels will not be reduced. Instead, current provision will be maintained.

Table 3.1: Short-term transitional supported housing required to maintain current levels of provision and account for population projections, number of units, 2025-2035

	2025	2030	2035	Change 2025-2030	Change 2030-2035	Change 2025-2035	Percentage Change 2025-2035
Inner London	13,775	14,020	14,340	250	320	565	4.1%
Outer London	8,330	8,415	8,530	100	115	210	2.5%
London	**22,105**	**22,435**	**22,870**	**350**	**440**	**775**	**3.5%**

Source: Sheffield Hallam University estimates

Note: Columns and rows may not sum to totals due to rounding. Negative change within individual LAs in any period set to 0.

Table 3.1 indicates an additional 350 units of short-term/transitional supported housing is required in London by 2030. Of these, 250 would be required in Inner London and 100 would be required in Outer London. By 2035, the number of units required increases to 775 of which 565 are in Inner London and 210 are in Outer London. Over the period 2025 to 2035, this represents an increase of 4.1 per cent in Inner London, 2.5 per cent in Outer London, and 3.5 per cent for London as a whole.

Table 3.2 provides details of long-term supported housing required from 2025 to 2035 if current provision rates are to be maintained, prevalence rates accounted for, and local population structure and ONS population projections considered. Approximately 90 additional units would be required in London by 2030. Of these approximately 50 are in Inner London and 45 are in Outer London (the figures are rounded and so do not sum to the total). By 2035, the number of units required increases to 220 of which 120 are in Inner London and 100 are in Outer London. Over the period 2025 to 2035, this represents an increase of 3.4 per cent in Inner London, 2.5 per cent in Outer London, and 2.9 per cent for London as a whole.

Table 3.2: Long-term supported housing required to maintain current levels of provision and account for population projections, number of units, 2025-2035

	2025	2030	2035	Change 2025-2030	Change 2030-2035	Change 2025-2035	Percentage Change 2025-2035
Inner London	3,445	3,485	3,560	50	75	120	3.4%
Outer London	4,095	4,130	4,190	45	60	100	2.5%
London	**7,540**	**7,615**	**7,750**	**90**	**135**	**220**	**2.9%**

Source: Sheffield Hallam University estimates

Note: Columns and rows may not sum to totals due to rounding. Negative change within individual LAs in any period set to 0.

Table 3.3 provides projections of older people's housing which would be required between 2025 to 2035 if current provision rates are to be maintained and the local population structure and ONS population projections taken into account. The large increases over time are a function of the ONS projections which predict there will be substantial growth in the number of people aged 65 (and especially amongst those aged over 70) in the next ten years.

Table 3.3: Older people's housing required to maintain current levels of provision and account for population projections, number of units, 2025-2035

	2025	2030	2035	Change 2025-2030	Change 2030-2035	Change 2025-2035	Percentage Change 2025-2035
Inner London	17,290	19,950	22,640	2,660	2,695	5,355	31.0%
Outer London	27,860	31,020	34,045	3,165	3,025	6,190	22.2%
London	**45,145**	**50,970**	**56,685**	**5,825**	**5,715**	**11,540**	**25.6%**

Source: Sheffield Hallam University estimates

Note: Columns and rows may not sum to totals due to rounding. Negative change within individual LAs in any period set to 0.

If the ONS population projections are realised, and the composition of these age groups remains as now, then an additional 5,825 units for older people's housing would be required in London by 2030. Of these 2,660 would be required in Inner London and 3,165 would be required in Outer London. By 2035, the number of units required increases to 11,540 of which 5,355 are in Inner London and 6,190 are in Outer London. Over the period 2025 to 2035, this represents an increase of 31 per cent in Inner London, 22.2 per cent in Outer London, and 25.6 per cent for London as a whole.

The projections assume that the composition of older population that may considered 'at risk' will remain the same over time given current prevalence and provision rates. The ONS population projections, a major factor driving future growth in the demand for older people's housing, will be based on local mortality rates for given age groups as well as factors such as migration. There are considerable variations in life expectancy by socio-economic groups, for example, wealthier people live longer. This may mean that whilst the population over 65 will grow considerably over the next ten years, the composition of the group may potentially change over time. This could mean that fewer of the 'population at risk' will require access to older people's housing at social rents. Alternatively, as trends in home ownership decline, more people may stay in rented accommodation throughout their lifespan. These people may eventually be more likely to require access to older people's housing at below market rents, especially if they do not have access to adequate pension provision or savings. Fluctuations in the economy and household incomes are also likely to influence how many people may find themselves in need of supported housing at social or affordable rents. The magnitude of these unknown factors cannot be taken account of in the projections which rely on steady state scenarios.

It also needs to be remembered that any additional units required in each type of service assumes that current levels of provision can be maintained. The Supported Housing Review conveys serious concerns voiced by many Local Authority Commissioners and Supported Housing Providers across England that this is becoming increasingly difficult to do. In some cases, providers were withdrawing from certain segments of the market or not creating new provision due to the view that the finances of supported housing are increasingly difficult to stack up. For some, periods of high inflation had increased running costs, but this had not been reflected in on-going or new commissioning contracts. For others, concerns raised centred on increases in staffing costs (the main component of the care, support and supervision provided) and issues around staff recruitment and retention.

Many providers and local authorities across England, including those in London, voiced concerns about the limited availability of revenue funding from councils to commission services providing a sufficient level of care, support and supervision that is required. Funding available varied significantly across local authorities. Many providers, and some Local Authorities, also questioned the Housing Benefit regulations for Specified Accommodation, or the local interpretation of the rules. The varied implementation of this system means that some providers state it is difficult to cover the higher accommodation costs required for the delivery of such services in some areas, especially if funding for commissioned services is not available.

These concerns question the ability of some areas to maintain current provision, as well as develop new provision, which would be required if current provision rates are to be maintained in the future. These concerns may be borne out by the annual regulatory data available from Registered Providers which show a decline in supported housing stock over time. In England, the number of supported housing units has fallen by 5,325 units from 2022 to 2025 – representing a fall of 1 per cent in the overall provision available in the regulated sector.

If national, regional or local policy direction sought to increase rates of provision more generally, then the assumptions used to generate these projections could be adjusted accordingly. Evidence from the national Supported Housing Review suggests that many stakeholders across local authorities in England feel that increasing local provision rates above the level they are currently at would be beneficial to a number of policy agendas. Higher rates of provision would assist the promotion of independent living in the community.

Increasing the supply of good quality short-term transitional supported housing has the potential to increase the ability of some of the most vulnerable in society to move towards more independent accommodation. The benefits associated with good quality provision include greater stability, improved social and wellbeing outcomes, better health outcomes, and employability outcomes. The provision of care, support and supervision provided alongside suitable accommodation can also associated with reductions in the use of, and costs to, wider service provision such as hospital visits and stays and the criminal justice system.

Increased provision of long-term supported housing for people who are disabled or have long-term health conditions, and for older people’s housing (especially extra care), is also associated with many social, health and cost benefits. These include the potential to reduce or delay the need for more expensive residential care, long-term hospital care or institutional care. Limitations to the available supply of supported housing can result in expensive blockages to hospital discharge pathways, the health system, and the social care system. Higher rates of provision could therefore help to deliver more cost-effective outcomes than is currently the case.

4

Increasing provision rates to address unmet need

Overview

The previous chapter demonstrates how many supported housing units are required for each type of service provision between 2025 and 2035. The projections assume prevalence rates remain at steady state over time and that current provision rates are maintained in line with population dynamics during the period. The assessment highlights that local variation in provision rates depends on a range of local contextual factors including local demographics, the economic composition of the local population, and the composition as well as levels of need.

This chapter now takes these projections one step further by considering how much additional provision would be required if areas are to raise provision rates on a par with those seen in local authorities in England who are deemed to be meeting local levels of need. This allows an assessment of unmet need in London. The benchmarking procedure used considers the rates of provision required to address unmet need. These have been designed to be sensitive to the composition of need and existing levels of supply in each local authority area.

A similar exercise, but at a national level, was undertaken in the 2023 Supported Housing Review. That study adapted a method originally developed by Wittenberg and Hu (2017) in a previous national study for the then Department for Communities and Local Government. The original study assessed the national supply of supported housing required to address unmet need in the sector in 2016. The national benchmarks used in the previous studies were not sensitive enough to take into account variation in context at a local level. Therefore, the new approach deployed here advances the 2023 Supported Housing Review method by creating estimates at a local authority level. A new calibrated benchmarking procedure has been developed to be more responsive to the local context.

Methods and assumptions

The 2023 Supported Housing Review utilised data from the Local Authority Commissioner Survey. All respondents were asked if there was any unmet need in their local authority. Of local authorities across Great Britian that took part in the survey, almost a third indicated they did not know if there was any unmet need in the local area. Of local authorities that were able to respond to the question, approximately 15 per cent stated there was no unmet need in their area. This underpins the benchmarking procedure used. Rates of provision relative to the population at risk that were seen to be at or above those in the top 15th percentile local authorities across England were surmised to be delivering sufficient supported housing to meet levels of need. Provision rates below this were taken as an indication of unmet need. A calculation was then made of how much additional provision would be needed to increase the national provision rate to be on a par with the top 15 per cent of local authorities[5].

A more nuanced approach is needed to produce local authority level estimates of unmet need. As discussed earlier in Chapter 3, a greater proportion of the proxy population at risk in areas of high deprivation tend to more generally rely on social housing provision. In wealthier areas, a lower proportion of the proxy population at risk may need social provision. For example, more older people in these areas may be able to buy a retirement property which provides support, install adaptations in their own homes or self-funded care. Provision rates are therefore influenced by the local composition of need as well as prevalence of conditions.

The distribution of provision rates relative to the proxy population at risk were examined across all local authorities in England and for different types of areas (Inner London, Outer London, The South East of England, cities, rural areas, and areas with high or low levels of deprivation). The analysis indicated that higher provision rates exist in more deprived areas or in areas with higher rates of statutory single homelessness and rough sleeping reflecting higher local levels of need. A greater proportion of the proxy population at risk in these areas are more likely to need supported housing. In areas with lower deprivation, or if families constitute a higher proportion of statutory homeless (e.g. outer London Boroughs) then these areas tend to have lower rates of provision. This is likely to reflect that a higher proportion of the at risk population may not rely on social provision or that often homeless families primarily require stable affordable housing (with or without floating support) rather than supported housing.

The variation in the distribution of provision rates in different types of places required the development of a calibrated benchmark rather than taking a flat rate approach. This allows the assessment of unmet need to be relative to the existing provision rate and local composition of need. A range of scenarios were tested to understand the distribution of provision rates relative to prevalence rates across different types of areas. These scenarios included testing the impact of excluding outliers, and the relationship between the 15th percentile (the proportion of local authorities reporting they had no unmet need in the Commissioner Survey), the 30th percentile (the point of the distribution where provision rates are more consistent across different types of area), the median (50th percentile), and existing individual local provision rates. The iterative testing procedure resulted in calibrated benchmarks arrived at for each type of service type which applies the proportional relationship between the 15th percentile and the 30th percentile of all local authorities in England to the local provision rate. The difference between the two is deemed to be a conservative estimate of the scale of unmet need in a local area.

The application of the calibrated benchmarking procedure includes a number of steps to implement. If local provision rates relative to the population at risk is above the 15th percentile, then the local area has a sufficient supply of supported housing to meet the current level of need. If the provision rate is below the 15th percentile, and increasing it in line with the proportionate difference between the 15th and 30th percentile does not take it above the 15th percentile, then the local authority ratio between provision and population at risk is increased by the percentage difference between the 30th and the 15th percentile of provision rates. In areas already close to the 15th percentile, the local ratio of provision to population at risk is increased to the 15th percentile. This calibrated benchmarking procedure is carried out separately for each of the three main types of service provision.

It needs to be remembered that estimating procedures are not an exact science. They are intended as a guide to the level of unmet need following the application of a generalised set of assumptions based on the best available data at the current time. Further detailed

[5] See 2023 Supported Housing Review for full details.

knowledge and insights on the specificities of local context for any individual area has the potential to nuance these estimates further. For example, some areas may have undertaken a detailed assessment of local supply and need for services which can provide additional evidence or data on local levels of unmet need. This data could also be built into future iterations of a benchmarking technique.

Estimates of supported housing units required to address unmet need

The estimates of unmet need are provided here alongside the other components of change previously outlined in earlier chapters. This allows an overall assessment of additional units required for each of the three main service types by the end of each five-year period.

Table 4.1 estimates the additional number of short-term/transitional supported housing units required over the next ten years. The first column provides the starting position of stock provision in 2025 within each local authority (as with earlier in Chapter 2). The next two columns have taken into consideration the local population structure and dynamics to estimate how many additional units will be required over the next ten years if current rates of provision are to be maintained and ONS population projections are actualised (as with earlier in Chapter 3). The next three columns provide estimates of unmet need at each point of time which are calculated on the basis of the assumptions and benchmarking procedures outlined above. These are additional units required over and above those in columns 2 and 3 which are needed to maintain provision rates and account for demographic change over time. The unmet need calculations in columns 4 to 6 indicate:

- In London, in addition to the units required to maintain current rates of provision and demographic change, a further 3,715 units would be required by 2035 if the supply of transitional supported housing units is going to be increased sufficiently to deliver enough provision for unmet need; an increase of 16.8 per cent on current levels of provision. Of these:
    - 2,090 units would be required in Inner London; an increase of 15.2 per cent on current levels of provision.
    - 1,625 units would be required in Outer London; an increase of 19.5 per cent on current levels of provision.

Table 4.1: Transitional supported housing - stock estimates, un-met need and additional units required by 2030 and 2035

Local authority	**Current provision** Estimated number of units 2025	**Maintain current rates of provision:** Units required to maintain current rates of provision; prevalence rates remain at steady state; and population projections are realised — Additional units required by 2030	Additional units required by 2035	**Un-met need:** additional units required if provision is increased to address unmet need; prevalence rates remain at steady state; and population projections are realised — Additional units for un-met need 2025	Additional units for un-met need 2030	Additional units for un-met need 2035	**Additional units required by 2030:**(incl. units required to maintain current rates of provision, prevalence rates remain at steady state and population projections are realised; and to address unmet need by 2030)	**Additional units required by 2035:**(incl. units required to maintain current rates of provision, prevalence rates remain at steady state and population projections are realised; and to address unmet need by 2035)
Inner London	**13,775**	**250**	**565**	**2,020**	**2,050**	**2,090**	**2,300**	**2,655**
City of London	15	<5	<5	5	5	5	5	5
Camden	1,170	15	40	0	0	0	15	40
Hackney	1,270	30	60	255	260	265	290	325
Hammersmith & Fulham	975	10	25	0	0	-	10	25
Islington	1,185	25	55	235	240	250	265	300
Kensington & Chelsea	780	0	5	155	145	140	145	145
Lambeth	1,590	15	45	320	320	325	340	370
Lewisham	1,535	25	55	0	0	0	25	55
Newham	830	10	30	165	170	170	180	200
Southwark	1,220	25	55	245	250	255	270	310
Tower Hamlets	1,140	70	130	230	240	255	310	385
Wandsworth	955	25	50	190	195	200	225	255
Westminster	1,115	0	10	225	220	225	220	235
Outer London	**8,330**	**100**	**210**	**1,590**	**1,605**	**1,625**	**1,705**	**1,835**
Barking & Dagenham	265	5	10	55	55	55	60	60
Barnet	525	10	20	105	105	110	115	130
Bexley	105	<5	5	20	20	20	25	25
Brent	820	0	0	165	165	165	165	165
Bromley	355	5	15	70	70	75	80	85
Croydon	925	10	25	185	185	190	200	215
Ealing	635	0	5	125	125	130	125	130
Enfield	430	0	0	85	85	85	85	85
Greenwich	705	20	40	140	145	150	165	190
Haringey	645	0	5	130	130	130	130	135
Harrow	170	<5	<5	35	35	35	35	35

Local authority	Current provision	Maintain current rates of provision: Units required to maintain current rates of provision; prevalence rates remain at steady state; and population projections are realised		Un-met need: additional units required if provision is increased to address unmet need; prevalence rates remain at steady state; and population projections are realised			Additional units required by 2030:(incl. units required to maintain current rates of provision, prevalence rates remain at steady state and population projections are realised; and to address unmet need by 2030)	Additional units required by 2035:(incl. units required to maintain current rates of provision, prevalence rates remain at steady state and population projections are realised; and to address unmet need by 2035)
	Estimated number of units 2025	Additional units required by 2030	Additional units required by 2035	Additional units for un-met need 2025	Additional units for un-met need 2030	Additional units for un-met need 2035		
Havering	210	10	15	40	45	45	50	60
Hillingdon	415	<5	15	85	85	85	90	100
Hounslow	285	<5	5	55	60	60	60	60
Kingston upon Thames	230	5	5	0	0	0	5	5
Merton	255	<5	5	20	20	20	20	25
Redbridge	220	<5	5	45	45	45	45	50
Richmond upon Thames	150	<5	<5	30	30	30	30	30
Sutton	265	10	15	55	55	55	65	70
Waltham Forest	715	10	25	145	145	150	155	175
London	**22,105**	**350**	**775**	**3,605**	**3,655**	**3,715**	**4,005**	**4,490**

Source: Sheffield Hallam University estimates

Note: Columns and rows may not sum to totals due to rounding. Negative change within individual LAs in any period set to 0.

Individual areas assessed to have no unmet need on the basis of these benchmarks tend to have reasonable levels of working age PRP supported housing provision recorded in the regulatory statistics relative to the estimated population at risk. The latter figure is primarily driven by taking into account the local Statutory Homelessness Statistics. It should be remembered that, as noted earlier, for a small number of local authorities it has been necessary to estimate the local level of statutory homeless. This is due to missing data for these areas in the official statistics. However, where this has been done the estimates are all in line with the data previously provided in these areas but updated for recent trends in homelessness.

The last two columns of Table 4.1 combine the number of additional units required to maintain current provision rates and population change along with delivering sufficient units for unmet need to assess the total number of additional units required by 2030 and 2035. If the projections are realised, prevalence remains at steady state, and provision rates are maintained then:

- By 2030, an additional 4,005 transitional units will be required in London, just over 18 per cent higher than levels of provision in 2025.
    - Of these 2,300 are required for Inner London and 1,705 for Outer London.
- By 2035, the number of additional units required increases to 4,490 just over 20 per cent higher than levels of provision in 2025.
    - Of these 2,655 are required in Inner London and 1,835 for Outer London.

Table 4.2 estimates the additional number of long-term supported housing units required over the next ten years. The previous data on current levels of stock provision and additional units required given the local population structure and dynamics, and maintaining current rates of provision over the next ten years are provided. The estimates of unmet need are calculated on the basis of the assumptions and benchmarking procedures outlined previously which indicate:

- In London, an additional 890 units would be required by 2035 if the of supply long-term supported housing units is to be increased sufficiently to deliver enough provision for unmet need; an increase of 11.8 per cent on current levels of provision. Of these:
    - 365 units would be required in Inner London; an increase of 10.6 per cent on current levels of provision.
    - 525 units would be required in Outer London; an increase of 12.8 per cent on current levels of provision.

Individual areas assessed to have no unmet need tend to have rates of PRP provision relative to the estimated population at risk which are on a par with those seen in the top 15 per cent of LAs in England. The population at risk figures are primarily driven by the application of national prevalence rates and local provision rates relative to local population dynamics. If any given area has notably higher prevalence rates then the national average then the benchmarking procedure could potentially understate unmet need in that area. Local prevalence rates are not available to this study. Potentially, if more fine-grained prevalence data is available to local stakeholders then this could be incorporated into future iterations of the estimates.

Table 4.2 combines the data on the number of additional units required to maintain current provision rates, population change and additional units required for unmet need to provide an overall assessment for the total number of units required by 2030 and 2035. Taking all these factors into account:

Table 4.2: Long-term supported housing - stock estimates, un-met need and additional units required by 2030 and 2035

Local authority	**Current provision**	**Maintain current rates of provision:** Units required to maintain current rates of provision; prevalence rates remain at steady state; and population projections are realised		**Un-met need:** additional units required if provision is increased to address unmet need; prevalence rates remain at steady state; and population projections are realised			**Additional units required by 2030:**(incl. units required to maintain current rates of provision, prevalence rates remain at steady state and population projections are realised; and to address unmet need by 2030)	**Additional units required by 2035:**(incl. units required to maintain current rates of provision, prevalence rates remain at steady state population projections are realised; and to address unmet need by 2035)
	Estimated number of units 2025	Additional units required by 2030	Additional units required by 2035	Additional units for un-met need 2025	Additional units for un-met need 2030	Additional units for un-met need 2035		
Inner London	**3,445**	**50**	**120**	**350**	**360**	**365**	**405**	**480**
City of London	5	<5	<5	<5	<5	<5	<5	<5
Camden	295	<5	10	0	0	0	<5	10
Hackney	315	5	15	15	15	15	20	30
Hammersmith & Fulham	245	<5	5	0	0	0	<5	5
Islington	295	5	15	5	5	5	10	15
Kensington & Chelsea	195	0	0	0	0	0	0	0
Lambeth	400	<5	5	15	15	15	15	20
Lewisham	385	5	10	0	0	0	5	10
Newham	205	<5	5	60	65	65	65	70
Southwark	305	5	10	90	95	95	95	105
Tower Hamlets	285	15	30	85	90	95	105	125
Wandsworth	240	5	10	70	75	75	80	90
Westminster	280	0	<5	5	5	5	5	5
Outer London	**4,095**	**45**	**100**	**520**	**525**	**525**	**570**	**625**
Barking & Dagenham	175	<5	5	20	20	20	20	25
Barnet	225	5	10	65	70	70	75	80
Bexley	70	<5	5	20	20	20	25	25
Brent	275	0	0	45	45	40	45	40
Bromley	235	5	10	30	30	30	35	40
Croydon	395	5	10	0	0	0	5	10
Ealing	425	0	0	0	0	0	0	0
Enfield	185	0	0	55	55	55	55	55
Greenwich	305	10	20	0	0	0	10	20

Local authority	Current provision	Maintain current rates of provision: Units required to maintain current rates of provision; prevalence rates remain at steady state; and population projections are realised		Un-met need: additional units required if provision is increased to address unmet need; prevalence rates remain at steady state; and population projections are realised			Additional units required by 2030:(incl. units required to maintain current rates of provision, prevalence rates remain at steady state and population projections are realised; and to address unmet need by 2030)	Additional units required by 2035:(incl. units required to maintain current rates of provision, prevalence rates remain at steady state population projections are realised; and to address unmet need by 2035)
	Estimated number of units 2025	Additional units required by 2030	Additional units required by 2035	Additional units for un-met need 2025	Additional units for un-met need 2030	Additional units for un-met need 2035		
Haringey	275	0	0	0	0	0	0	
Harrow	110	0	<5	35	35	35	35	35
Havering	140	5	10	40	45	45	50	55
Hillingdon	175	5	5	55	55	55	60	60
Hounslow	125	<5	<5	35	35	35	35	40
Kingston upon Thames	75	<5	<5	25	25	25	25	25
Merton	170	<5	5	20	20	20	20	20
Redbridge	150	<5	5	45	45	45	45	50
Richmond upon Thames	100	<5	<5	30	30	30	30	30
Sutton	175	5	10	0	0	0	5	10
Waltham Forest	305	5	10	0	0	0	5	10
London	**7,540**	**90**	**220**	**875**	**880**	**890**	**975**	**1,110**

Source: Sheffield Hallam University estimates

Note: Columns and rows may not sum to totals due to rounding. Negative change within individual LAs in any period set to 0.

- By 2030, an additional 975 long-term units will be required in London, 12.9 per cent higher than levels of provision in 2025.
    - Of these 405 are required in Inner London and 570 for Outer London.
- By 2035, the number of additional long-term units required increases to 1,110, 14.7 per cent higher than levels of provision in 2025.
    - Of these 480 are required for Inner London and 625 for Outer London[6].

Table 4.3 estimates the additional number of older people's housing units required over the next ten years. The table includes the data on current levels of stock provision and additional units required given the local population structure and dynamics, and maintaining current rates of provision over the next ten years. The estimates of unmet need are calculated on the basis of the assumptions and benchmarking procedures outlined previously which indicate:

- In London, an additional 11,265 units of older people's housing would be required by 2035 if the supply is to be increased sufficiently to deliver enough provision for unmet need; an increase of 25 per cent on current levels of provision. Of these:
    - 4,585 units would be required in Inner London; an increase of 26.5 per cent on current levels of provision.
    - 6,680 units would be required in Outer London; an increase of 24 per cent on current levels of provision.

Individual areas assessed to have no unmet need are areas with local authority stock which is contributing sizeable amounts of sheltered housing to these areas which is in addition to PRP older people's stock in the area. An overall assessment for the total number of units required by 2030 and 2035 is provided by combining the number of additional older people's housing units required to maintain current provision rates, population change and additional units required for unmet need. Given the ONS projections which predict substantial growth in the number of people aged over 65, then when all these factors into account:

- By 2030, an additional 15,985 older people housing units will be required in London, 35.4 per cent higher than levels of provision in 2025
    - Of these 6,705 units are required in Inner London and 9,280 in Outer London
- By 2035, the number of additional older people housing units required in London increases to 22,805, 50.5 per cent higher than levels of provision in 2025
    - Of these 9,940 are required for Inner London and 12,865 in Outer London.

Table 4.4 combines the data from Tables 4.1 to 4.3 to provide estimates of the total number of additional units across all supported housing service types which will be required by 2035.

[6] Totals do not sum due to rounding.

Table 4.3: Older people's housing - stock estimates, un-met need and additional units required by 2030 and 2035

Local authority	**Current provision**	**Maintain current rates of provision:** Units required to maintain current rates of provision; prevalence rates remain at steady state and and population projections are realised		**Un-met need:** additional units required if provision is increased to address unmet need; prevalence rates remain at steady state; and population projections are realised			**Additional units required by 2030:**(incl. units required to maintain current rates of provision, prevalence rates remain at steady state and population projections are realised; and to address unmet need by 2030)	**Additional units required by 2035:**(incl. units required to maintain current rates of provision, prevalence rates remain at steady state and population projections are realised; and to address unmet need by 2035)
	Estimated number of units 2025	Additional units required by 2030	Additional units required by 2035	Additional units for un-met need 2025	Additional units for un-met need 2030	Additional units for un-met need 2035		
Inner London	**17,290**	**2,660**	**5,355**	**3,515**	**4,045**	**4,585**	**6,705**	**9,940**
City of London	200	25	55	0	0	0	25	55
Camden	1,025	125	255	255	290	320	415	575
Hackney	1,955	350	685	70	80	95	430	775
Hammersmith & Fulham	590	80	165	145	165	190	245	350
Islington	875	125	245	220	250	280	375	525
Kensington & Chelsea	1,280	180	345	320	365	405	545	750
Lambeth	2,355	420	830	365	430	495	850	1,330
Lewisham	1,330	205	395	330	385	430	590	825
Newham	1,025	160	335	255	295	340	455	680
Southwark	1,470	285	545	365	440	505	720	1,050
Tower Hamlets	1,135	190	435	285	330	390	520	825
Wandsworth	2,015	280	560	505	575	645	850	1,205
Westminster	2,045	240	500	395	440	490	685	990
Outer London	**27,855**	**3,165**	**6,190**	**5,505**	**6,115**	**6,680**	**9,280**	**12,865**
Barking & Dagenham	1,200	110	245	0	0	0	110	245
Barnet	2,090	265	515	520	590	650	855	1,170
Bexley	1,455	125	230	365	395	420	525	655
Brent	1,130	150	315	285	320	360	470	675
Bromley	2,165	185	320	540	585	620	770	945
Croydon	2,335	290	540	585	655	720	950	1,260
Ealing	1,920	250	510	480	540	605	795	1,115
Enfield	765	85	165	190	215	235	300	400
Greenwich	1,810	230	460	0	0	0	230	460
Haringey	2,275	330	665	0	0	0	330	665
Harrow	1,230	120	230	305	335	365	455	600

Local authority	Current provision	Maintain current rates of provision: Units required to maintain current rates of provision; prevalence rates remain at steady state and and population projections are realised		Un-met need: additional units required if provision is increased to address unmet need; prevalence rates remain at steady state; and population projections are realised			Additional units required by 2030:(incl. units required to maintain current rates of provision, prevalence rates remain at steady state and population projections are realised; and to address unmet need by 2030)	Additional units required by 2035:(incl. units required to maintain current rates of provision, prevalence rates remain at steady state and population projections are realised; and to address unmet need by 2035)
	Estimated number of units 2025	Additional units required by 2030	Additional units required by 2035	Additional units for un-met need 2025	Additional units for un-met need 2030	Additional units for un-met need 2035		
Havering	1,285	85	155	320	345	360	430	515
Hillingdon	830	90	175	210	230	250	315	425
Hounslow	1,130	150	295	280	320	355	465	655
Kingston upon Thames	230	25	50	60	65	70	90	120
Merton	830	100	200	210	235	260	330	460
Redbridge	1,270	115	240	315	345	375	465	615
Richmond upon Thames	905	125	225	225	255	285	380	510
Sutton	1,525	160	295	380	420	450	580	745
Waltham Forest	1,470	170	345	235	260	290	430	635
London	**45,145**	**5,825**	**11,540**	**9,020**	**10,160**	**11,265**	**15,985**	**22,805**

Source: Sheffield Hallam University estimates

Note: Columns and rows may not sum to totals due to rounding. Negative change within individual LAs in any period set to 0.

Table 4.4: Total supported housing - stock estimates, un-met need and additional units required by 2030 and 2035

Local authority	**Current provision**	**Maintain current rates of provision:** Units required to maintain current rates of provision; prevalence rates remain at steady state; and population projections are realised		**Un-met need:** additional units required if provision is increased to address unmet need; prevalence rates remain at steady state and population projections are realised			**Additional units required by 2030:**(incl. units required to maintain current rates of provision, prevalence rates remain at steady state and population projections are realised; and to address unmet need by 2030)	**Additional units required by 2035:**(incl. units required to maintain current rates of provision, prevalence rates remain at steady state and population projections are realised; and to address unmet need by 2035)
	Estimated number of units 2025	Additional units required by 2030	Additional units required by 2035	Additional units for un-met need 2025	Additional units for un-met need 2030	Additional units for un-met need 2035		
Inner London	**34,505**	**2,960**	**6,035**	**5,885**	**6,455**	**7,040**	**9,410**	**13,075**
City of London	220	25	55	5	5	5	30	60
Camden	2,490	140	305	255	290	320	430	625
Hackney	3,545	385	760	340	355	375	745	1,135
Hammersmith & Fulham	1,810	90	195	145	165	190	260	385
Islington	2,355	155	315	460	495	530	650	845
Kensington & Chelsea	2,250	180	350	475	510	545	690	895
Lambeth	4,340	435	880	700	770	835	1,205	1,720
Lewisham	3,245	235	460	330	385	430	615	890
Newham	2,060	170	370	485	525	575	700	950
Southwark	2,990	310	610	700	780	850	1,090	1,460
Tower Hamlets	2,555	275	600	595	660	740	940	1,340
Wandsworth	3,210	310	625	765	845	920	1,155	1,545
Westminster	3,440	240	510	625	670	720	910	1,230
Outer London	**40,285**	**3,310**	**6,500**	**7,615**	**8,240**	**8,830**	**11,550**	**15,330**
Barking & Dagenham	1,640	115	260	75	75	75	190	335
Barnet	2,840	280	545	695	765	830	1,040	1,375
Bexley	1,630	130	240	405	440	465	570	705
Brent	2,225	150	315	490	525	565	680	880
Bromley	2,755	195	345	640	690	725	885	1,070
Croydon	3,655	305	575	770	845	910	1,150	1,485
Ealing	2,980	250	515	605	670	735	920	1,245
Enfield	1,375	85	165	330	350	370	440	540
Greenwich	2,820	260	515	140	145	150	405	665
Haringey	3,195	330	670	130	130	130	460	800
Harrow	1,510	120	235	375	405	435	525	670

Local authority	Current provision	**Maintain current rates of provision:** Units required to maintain current rates of provision; prevalence rates remain at steady state; and population projections are realised		**Un-met need:** additional units required if provision is increased to address unmet need; prevalence rates remain at steady state and population projections are realised			**Additional units required by 2030:**(incl. units required to maintain current rates of provision, prevalence rates remain at steady state and population projections are realised; and to address unmet need by 2030)	**Additional units required by 2035:**(incl. units required to maintain current rates of provision, prevalence rates remain at steady state and population projections are realised; and to address unmet need by 2035)
	Estimated number of units 2025	Additional units required by 2030	Additional units required by 2035	Additional units for un-met need 2025	Additional units for un-met need 2030	Additional units for un-met need 2035		
Havering	1,635	100	180	405	430	450	530	630
Hillingdon	1,420	100	195	345	370	390	465	585
Hounslow	1,540	150	300	375	415	450	565	755
Kingston upon Thames	540	30	60	80	90	95	120	155
Merton	1,260	105	210	245	270	295	375	505
Redbridge	1,640	120	250	405	435	470	555	715
Richmond upon Thames	1,160	125	225	285	320	345	440	570
Sutton	1,965	175	320	430	475	510	650	825
Waltham Forest	2,495	185	380	375	405	435	595	820
London	**74,790**	**6,270**	**12,535**	**13,500**	**14,695**	**15,865**	**20,960**	**28,400**

Source: Sheffield Hallam University estimates

Specified Accommodation

5

Overview

People who live in supported housing and require financial support towards their housing costs may claim benefits from DWP to help with their rent. At the point of making a claim people are asked to indicate if they live within supported housing. This allows assessment of the claim to see if it meets the rules to be assessed as a Housing Benefit Specified Accommodation claim[7].

The criteria considered to see if a claim is eligible includes the type of landlord, the tenant being assessed as needing care support or supervision, that this is being provided, and if so by whom. Specified Accommodation includes supported housing that is provided by non-registered as well as registered providers. As discussed earlier in Chapter 2, this data informs the creation of stock estimates. In areas with more Specified Accommodation claimants than stock held by registered providers' (including an uplift to account for the percentage of additional stock generally provided by non-registered providers), then the local stock estimates have been adjusted to include the additional supply of non-registered stock provision which is over and above the level that might, on average, be expected in any given area.

The HB regulations for Specified Accommodation are complex and a brief overview of the system is provided here. A fuller discussion of the Specified Accommodation system and how it relates to different elements of supported housing can be found in the Supported Housing Review 2023.

In brief, Specified Accommodation rules use a four-fold classification which includes **Exempt Accommodation, Managed Properties, Refuges, and Local Authority Hostels**. These categories determine how eligible rents and service charges are assessed under Housing Benefit regulations. For supported housing to be classified as **Exempt Accommodation** it needs to meet one of two criteria: either being a resettlement place[8] or being supported accommodation provided by a landlord who is a non-metropolitan County Council (in England), a Housing Association, a registered charity or a voluntary organisation; and the landlord or someone acting on their behalf provides tenants with care, support or supervision.

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[7] Additional requirements that need to be met are set out in the Department for Work and Pensions 'Housing Benefit Guidance for Supported Housing Claims' (Department for Work and Pensions, 2022)

[8] A "resettlement place" is defined in the Jobseekers Act 1995, section 30 (2) this refers to places: at which persons without a settled way of life are afforded temporary accommodation with a view to assisting them to lead a more settled life. The grant funding for resettlement places to provide temporary accommodation for single homeless people no longer exists but establishments which were previously funded on this basis, and continue to operate on this basis, are eligible for Exempt Accommodation status.

In line with the Exempt Accommodation definition, the landlord of **Managed Properties** can also only be a County Council (in England), a Housing Association, a registered charity or a voluntary organisation. The main difference compared to Exempt Accommodation is that the care, support or supervision does not need to be directly provided by the landlord or someone on their behalf. Instead, the main care provider may be directly commissioned and acting on behalf of the local authority or other statutory body.

The third category of Specified Accommodation is **Refuges**. This is accommodation provided for people fleeing domestic abuse where the landlord is a local authority, a Housing Association, a registered charity or a voluntary organisation. There is no requirement that care, support or supervision is provided for the property to be defined as a Refuge. The fourth category of Specified Accommodation is **Local Authority hostels**. These provide supported housing which is not self-contained, is owned or managed by local authorities and provides care, support or supervision for individuals.

It needs to be remembered that Housing Benefit only meets the eligible accommodation costs of Specified Accommodation and not the additional support costs for providing care, support or supervision. The latter may be funded through the commissioning of services by the local authority or NHS; by funds available from charities or voluntary sector organisations delivering the services; by funds or cross-subsidy from providers' income streams; and in some cases, the support package may be funded by the individual.

Working age claimants who live in supported housing which falls within Specified Accommodation rules receive support towards their housing costs under the Housing Benefit system rather than the housing element within the Universal Credit system. All claimants in pensionable age households are assessed within the Housing Benefit system. Local authorities administer the Housing Benefit system and submit a monthly return of all Housing Benefit claims to the DWP. The department then compiles these records into a single database called the Single Housing Benefit Extract (SHBE).

Aggregate SHBE data with information about how many HB claims meet the Specified Accommodation criteria is not generally available in the public realm. For the purposes of this study, the research team submitted a Freedom of Information request to DWP to obtain the aggregate data for local authorities in London. As was indicated earlier in Chapter 2, this data was integrated into the estimation procedures to improve the understanding of how much stock is available in each local authority area.

The SHBE data is provided here to provide insights on the number of Housing Benefit claimants with Specified Accommodation claims in each local authority. Table 5.1 provides a snapshot of the three-month average number of Specified Accommodation claimants in London to August 2025. These account nearly one in ten of all Housing Benefit claims in London. The Specified Accommodation claims are split very evenly between Inner and Outer London with approximately 50 per cent in each.

There are 21,040 Specified Accommodation claims for working age households. This equates to 80 per cent of all Specified Accommodation claims and 17 per cent of all working age Housing Benefit claims in London. There are a further 5,190 Specified Accommodation claims amongst pensionable age households. This equates to 20 per cent of all Specified Accommodation claims and 3 per cent of all pensionable age Housing Benefit claims in London. It can be seen from Table 5.1 that there is quite a bit of variation in the balance of working age and pensionable age claimants across the local authorities in London.

Table 5.1: Housing Benefit Specified Accommodation claimants by age group, Single Housing Benefit Extract (SHBE), August 2025[9]

Local authority	Working age Specified Accom. Claims	Pension age Specified Accom. Claims	All Specified Accom. Claims	Working age Specified Accom. as % of all claims	Pension age Specified Accom. as % of all claims	All Specified Accom. % of all claims
Inner London	**10,560**	**2,690**	**13,250**	**80%**	**20%**	**100%**
City of London	10	10	30	50%	50%	100%
Camden	980	460	1,440	68%	32%	100%
Hackney	810	50	860	94%	6%	100%
Hammersmith & Fulham	470	80	540	85%	15%	100%
Islington	910	40	940	96%	4%	100%
Kensington & Chelsea	530	460	980	54%	46%	100%
Lambeth	1,330	270	1,600	83%	17%	100%
Lewisham	1,510	370	1,880	80%	20%	100%
Newham	740	180	930	80%	20%	100%
Southwark	920	340	1,260	73%	27%	100%
Tower Hamlets	1,000	120	1,120	89%	11%	100%
Wandsworth	430	20	450	96%	4%	100%
Westminster	920	290	1,220	76%	24%	100%
Outer London	**10,480**	**2,520**	**13,020**	**81%**	**19%**	**100%**
Barking & Dagenham	290	270	560	52%	48%	100%
Barnet	510	40	550	93%	7%	100%
Bexley	170	30	200	85%	15%	100%
Brent	970	110	1,080	90%	10%	100%
Bromley	300	120	420	71%	29%	100%
Croydon	1,320	340	1,660	80%	20%	100%
Ealing	1,060	400	1,470	73%	27%	100%
Enfield	570	30	600	95%	5%	100%
Greenwich	1,010	140	1,150	88%	12%	100%
Haringey	630	120	750	84%	16%	100%
Harrow	280	60	340	82%	18%	100%
Havering	350	30	380	92%	8%	100%
Hillingdon	590	120	710	83%	17%	100%
Hounslow	410	100	510	80%	20%	100%
Kingston upon Thames	290	50	340	85%	15%	100%
Merton	290	20	300	94%	6%	100%
Redbridge	370	440	820	46%	54%	100%
Richmond upon Thames	160	10	170	94%	6%	100%
Sutton	300	40	350	88%	12%	100%
Waltham Forest	610	50	660	92%	8%	100%
London	**21,040**	**5,190**	**26,230**	**80%**	**20%**	**100%**

Source: DWP Internal Analysis, Single Housing Benefit Extract (SHBE)

Note: Rows and columns may not sum to totals due to rounding.

[9] All SHBE tables with local authority level data are based on a three-month average of count of claimants to August 2025.

Many pensionable age claimants within sheltered housing live in accommodation which does not meet the eligibility criteria for Specified Accommodation under Housing Benefit rules. Therefore, for Housing Benefit purposes, many claimants within sheltered housing will be assessed within the rules for general needs accommodation. Predominantly, extra care provision, which accounts for around 10 to 15 per cent of all pensionable age provision in England, falls within Specified Accommodation rules.

Table 5.2: Housing Benefit Specified Accommodation claimants by age group, Single Housing Benefit Extract (SHBE), August 2025

Local authority	Exempt Accom. Claims	Other Specified Accom. Claims	All Specified Accom. Claims	Exempt Accom. Claims %	Other Specified Accom. Claims %	All Specified Accom. Claims %
Inner London	**11,270**	**2,020**	**13,250**	**85%**	**15%**	**100%**
City of London	30	0	30	100%	0%	100%
Camden	1,080	370	1,440	74%	26%	100%
Hackney	840	20	860	98%	2%	100%
Hammersmith & Fulham	510	40	540	93%	7%	100%
Islington	890	50	940	95%	5%	100%
Kensington & Chelsea	940	50	980	95%	5%	100%
Lambeth	820	770	1,600	52%	48%	100%
Lewisham	1,800	80	1,880	96%	4%	100%
Newham	790	140	930	85%	15%	100%
Southwark	1,090	180	1,260	86%	14%	100%
Tower Hamlets	1,030	100	1,120	91%	9%	100%
Wandsworth	390	60	450	87%	13%	100%
Westminster	1,060	160	1,220	87%	13%	100%
Outer London	**10,610**	**2,400**	**13,020**	**82%**	**18%**	**100%**
Barking & Dagenham	330	230	560	59%	41%	100%
Barnet	480	80	550	86%	14%	100%
Bexley	170	30	200	85%	15%	100%
Brent	900	190	1,080	83%	17%	100%
Bromley	360	60	420	86%	14%	100%
Croydon	1,500	150	1,660	91%	9%	100%
Ealing	1,020	450	1,470	69%	31%	100%
Enfield	590	10	600	98%	2%	100%
Greenwich	1,130	20	1,150	98%	2%	100%
Haringey	510	240	750	68%	32%	100%
Harrow	270	70	340	79%	21%	100%
Havering	220	150	380	59%	41%	100%
Hillingdon	510	200	710	72%	28%	100%
Hounslow	400	100	510	80%	20%	100%
Kingston upon Thames	280	60	340	82%	18%	100%
Merton	290	10	300	97%	3%	100%
Redbridge	720	100	820	88%	12%	100%
Richmond upon Thames	150	20	170	88%	12%	100%
Sutton	250	100	350	71%	29%	100%
Waltham Forest	530	130	660	80%	20%	100%
London	**21,830**	**4,400**	**26,230**	**83%**	**17%**	**100%**

Source: DWP Internal Analysis, Single Housing Benefit Extract (SHBE)

Note: Rows and columns may not add up due to rounding

Table 5.2 indicates that 21,830 of the Specified Accommodation claims (83 per cent) in London meet the requirements to be assessed as Exempt Accommodation. The Exempt Accommodation definition acknowledges that the costs of managing shared and supported housing are higher than in general needs provision. For example, this may be due to higher maintenance, repairs and renewal costs or additional security, health or safety measures required. Therefore, the eligible rent for Exempt Accommodation is calculated using the pre-1996 Housing Benefit rules and are not subject to local maximum rent restrictions introduced in 1996. That said, the pre-1996 rules do allow the local authority to restrict the rent to the level seen in alternative suitable accommodation if they consider the rent to be unreasonably high or the accommodation is too large for the claimant's needs.

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Summary of findings

6

Overview

This study builds on methods previously developed by CRESR for the national Supported Housing Review 2023 for MHCLG and DWP. The analysis gets beyond national data to generate regional, sub-regional and local authority level supported housing stock estimates. The research provides an overview of the scale and distribution of supported housing in London in 2025 and provides estimates of supported housing need to 2035. This research will inform the development of the London Plan and support London boroughs to meet new statutory duties which were introduced through the Supported Housing (Regulatory Oversight) Act 2023. Local authorities will be required to undertake their own needs assessments and the data provided here can help to inform the process. Integration of locally held data and in-depth knowledge of the local supported housing landscape will help to refine the estimates further.

The study:

- **Includes:** supported accommodation which is designed or designated to come with care, support or supervision to help people who are vulnerable, socially disadvantaged or are disabled to live as independently as possible in the community.
- **Does not include:** floating support, which is allocated to an individual rather than integral to supported accommodation provided. The study does not include retirement housing in the private sector which may also provide care, support or supervision but which is either owner-occupied or available at market rents. Residential care homes are also beyond the scope of the study.
- **Builds on:** robust regulatory data on supported housing delivered by PRPs and LARPs.
- **Integrates:** DWP Housing Benefit data from the Single Housing Benefit Extract containing the number of claimants in Specified Accommodation within each local authority.
- **Takes into account:** the supply of supported housing from non-registered providers.

Current stock estimates

Chapter 2 provides supported housing stock estimates for individual local authorities; Inner London; Outer London; and London as a whole. In 2025, there were:

- 74,790 supported housing units in London.
    - 34,505 (46 per cent) of these are in Inner London.
    - 40,285 (54 per cent) are in Outer London.

Supported housing provides vital accommodation which is provided alongside care, support or supervision to support the most vulnerable in society to live as independently as possible in the community. The needs of tenants, both in terms of types of accommodation and levels of support required, vary notably across client groups. Provision falls into three main service types:

- **Short-term/transitional supported accommodation:** intermediate provision for a range of cohorts with support needs with a view to move on towards more independent accommodation. Duration of stay would typically be two years or less (but this isn't a fixed time limit). This may include hostels and transitional housing for people in crisis.
    - 30 per cent of provision in London is short-term/transitional accommodation (22,105 units).
        - A higher proportion of stock in Inner London is for short-term transitional provision (40 per cent; 13,775 units).
        - A lower proportion of stock in Outer London is for short-term transitional provision (21 per cent; 8,330 units).
- **Long-term supported housing for working age disabled people:** provision for people with a physical disability or long-term mental health conditions, and people with a learning disability and/or autistic people or living with other lifelong conditions. This type of provision is often known as "supported living".
    - 10 per cent of provision in Inner London, Outer London and London as a whole is for long-term provision (7,540 units).
- **Housing for older people with care and/or support needs:** supported housing typically designed for and restricted to people aged over 55. This may have different names depending on the design, for example sheltered housing (although this often much of this comes with very limited levels of care and support), flexible retirement housing, retirement villages, very sheltered and extra care.
    - 60 per cent of provision in London is for older people's housing (45,145 units).
        - A higher proportion of stock in Outer London is older people's housing (69 per cent).
        - A lower proportion of stock in Inner London is older people's housing (50 per cent).

Additional supported housing required to maintain current rates of provision

Chapter 3 estimates the stock that would be required by 2035 to maintain current rates of provision and account for demographic trends. These estimates take into account the underlying population structure within each area and ONS population projections. It needs to be remembered that the population aged 65 and older are predicted to increase rapidly over the next ten years. At the same time, the working age population in London is relatively stable and for some age groups predicted to decline over the period.

The prevalence of 'conditions' or 'situations' associated with the population at risk of requiring supported housing are taken into consideration and prevalence rates are kept at steady state in the projections. Once these factors have been accounted for, in order to maintain current rates of provision it is estimated that by 2035 London requires:

- 11,540 additional units for older people's housing; an increase of 25.6 per cent.

- 775 additional units of short-term provision; an increase of 3.5 per cent.
- 220 additional units of long-term provision; an increase of 2.9 per cent.

Additional supported housing units required for unmet need

Chapter 4 takes the projections one step further by considering how much additional provision would be required if provision rates are raised to be on a par with those seen in local authorities who took part in the 2023 Commissioner Survey for the Supported Housing Review and reported that they had no unmet need. A locally calibrated benchmarking procedure has been deployed to account for prevalence rates, provision rates, and the local composition of need.

To increase provision rates to a **sufficient level to deliver supported housing units for unmet need for short-term/transitional provision** requires:

- 3,715 additional units in London by 2035; equivalent to an increase of 16.8 per cent on current stock levels. Of these,
  - 2,090 units would be for Inner London; an increase of 15.2 per cent.
  - 1,625 units would be for Outer London; an increase of 19.5 per cent.

To increase provision rates to a **sufficient level to deliver supported housing units for unmet need for long-term provision** requires:

- 890 additional units in London by 2035; an increase of 11.8 per cent on current stock levels. Of these:
  - 365 units would be for Inner London; an increase of 10.6 per cent.
  - 525 units would be for Outer London; an increase of 12.8 per cent.

To increase provision rates to a **sufficient level to deliver supported housing units for unmet need for older people's housing** requires:

- 11,265 additional units in London by 2035; an increase of 25 per cent on current stock levels. Of these:
  - 4,585 units would be for Inner London; an increase of 26.5 per cent.
  - 6,680 units would be for Outer London; an increase of 24 per cent.

Total additional supported housing units required to maintain current rates of provision and for unmet need

This section combines the estimates of the additional units required to maintain current provision rates with units required for unmet need. The combined estimates account for population projections and prevalence rates. **The total additional units required in London by 2035 for each service type are:**

- **For short-term transitional supported housing**:
  - 4,490 additional units; just over 20 per cent higher than stock levels in 2025.
    - Of these, 2,655 would be required in Inner London and 1,835 for Outer London.
- **For long-term supported housing**:
  - 975 additional units; 12.9 per cent higher than stock levels in 2025.

        - Of these, 405 would be required in Inner London and 570 for Outer London.

- **For older people's housing**:
    - 22,805 additional units; 50.5 per cent higher than stock levels in 2025.
        - Of these, 9,940 would be required in Inner London and 12,865 for Outer London.

Specified Accommodation

People who require financial support towards their housing costs and live in supported housing have their claim assessed under Housing Benefit Specified Accommodation regulations. The assessment criteria consider the type of landlord, the tenant being assessed as needing care support or supervision, that this is being provided, and if so by whom. Specified Accommodation rules use a four-fold classification which includes Exempt Accommodation, Managed Properties, Refuges, and Local Authority Hostels. This categorisation determines the rules used to assess the level of eligible rent for the accommodation.

Aggregate data from the DWP Single Housing Benefit Extract (SHBE) was obtained to provide a profile of the number and characteristics of Specified Accommodation claimants in each local authority. In London in August 2025, there were:

- 26,230 Specified Accommodation claimants.
    - 21,040 are working age households (80 per cent).
    - 5,190 are pensionable age households (20 per cent).
    - 21,830 of the Specified Accommodation claims are Exempt Accommodation (83 per cent).

Additional information on the characteristics of new tenants starting a supported housing letting with a PRP or a LARP in 2024/25 is provided in Appendix A2. The data tables are derived from MHCLG CORE (the continuous recording of lettings and sales in social housing in England). The CORE data provides information on the characteristics of new tenants within supported housing, their household circumstances and the homes they rent. All providers delivering affordable rent units are obliged to this provide data for their new supported housing tenancies to CORE.

Appendix 1 – Statistical Appendix

A1

Supported Housing Review 2023: data sources

Supported Housing Review: Local Authority Commissioner Survey

A Local Authority Commissioner Survey was undertaken as part of the Supported Housing Review. The invitation to take part was cascaded to relevant local authority staff involved in commissioning supported housing. This was done via an electronic invitation sent via the DWP's Local Authority Single Point of Contact list to invite local authorities to take part in the survey. See the Supported Housing Review for full details.

A total of 79 local authority and County Council commissioners completed a survey out of a potential 205 local authorities or County Councils. This represents an overall response rate of 39 per cent. Not all local authorities were able to provide all the data requested but partial returns were included in the data. Of the 32 London Boroughs invited to take part in the survey 12 responded representing a response rate of 38 per cent. Of the 12 London Boroughs taking part in the survey 7 are Inner London Boroughs and 5 are Outer London Boroughs. The data has been used alongside the Supported Housing Provider Survey to inform the allocation of stock by service types.

Supported Housing Review: Supported Housing Provider Survey

A Supported Housing Provider Survey was undertaken as part of the Supported Housing Review. A sampling frame of both registered and non-registered providers was compiled from a range of sources. See the Supported Housing Review for full details.

Fieldwork took place between 11 May 2023 and 10 July 2023. A series of electronic reminders were sent by the research team to the sampling frame. A total of 679 providers were invited to participate in the survey. In total, 189 questionnaires were submitted, representing an overall response rate of 28 per cent. The distribution of stock by service type was used to inform the calculations for stock estimates.

As well as drawing on this data from the sample as a whole, a subsample of 45 providers were analysed as they delivered supported housing in London. SDR data for the regulated providers taking part in the survey was merged onto the survey data set to identify the specific local authorities they operated in. The non-registered providers' taking part with stock in London had further details of the location of their merged with their survey responses. This London subsample make up a quarter of the overall survey. Of these:

- 80 per cent were PRPs and 20 per cent were non-registered providers.
- 53 per cent were providers based in London with the majority of their provision located in London (some also had units in a few districts adjacent to London).

- 47 per cent were national providers with supported housing provision across numerous regions including London.
- 53 per cent were small providers and 47 per cent were large providers.
- 36 were registered providers and 9 were non-registered providers.

Data sources for calculation of prevalence rates

The following data sources form the basis for assessing prevalence rates:

- ONS Subnational Population Projections: 2022-based: Local authority level data.
- MHCLG Statutory Homelessness Statistics: Detailed local authority level tables, April 2024 to March 2025.
- Health Survey for England 2024.
  - Number of Activities of Daily Living (ADLs and IADLs) for which help was needed in the last month, over 65 year olds by five-year age groups.
- ONS Crime Survey for England and Wales, year ending March 2024.
  - Prevalence of domestic abuse in the last year among people aged 16 years and over, by age.
- Department for Education: Children looked after in England including adoptions, reporting year 2025.
  - Care leavers by single year of age.
- Adult Psychiatric Morbidity Survey: Survey of Mental Health and Wellbeing, 2023/24, England.
  - Drug dependence by age.
  - Drinking dependence by age.
  - Severity of symptoms (CIS-R score) of common mental health conditions (CMHCs) by age.
- Institute of Public Care (2009): Estimates of the prevalence of people with complex or severe learning disability in adults 2009 prevalence rates for people with complex or severe learning disabilities by age bands.
- PANSI data - Projecting Adult Needs and Service Information.
  - Prevalence of a serious physical disability by age.

Method for creating stock estimates

The stock estimates are derived by taking a number of iterative steps which build on assumptions originally tested in the Supported Housing Review. These have been refined further to tailor the assumptions specifically to data for London and to integrate SHBE data into the estimates.

Stage 1: derive first estimate of overall stock estimates:

- **SDR and LADR** regulatory statistics from RPs: total number of regulated supported housing units in each local authority area.

- **PLUS** increase by grossing factor to account for additional stock delivered by non-registered providers which is over and above provision from registered providers (source: Providers Survey).
  - SDR data grossed up by 8 per cent in London (compares with 5 per cent in England in Supported Housing Review).
  - Derived from a sub-sample of the Provider Survey of providers who indicated they had stock in London.
    - If a provider indicated they are registered with the RSH, then the number of units they have within London from the SDR was merged onto their survey responses.
    - Non-registered providers that indicated they had units in London had their survey responses compared to information on their websites. This allowed confirmation of how much of their overall stock was within London or further afield.
  - The total stock delivered in London by registered providers accounted for 93 per cent of all London provision and 7 per cent was delivered by non-registered providers. This leads to the application of **a grossing factor of 8 per cent** which is applied to SDR data to account for additional stock provided by non-registered providers.

Stage 2: estimate older people's housing stock:

- Estimate older people's housing (OPH) in each LA.
  - PRP older people's housing recorded in SDR (65 per cent of PRP stock) grossed up by 8 per cent.
  - **PLUS** all LARP supported housing (assumption derived from London Authority responses to Commissioner Survey).

Stage 3: estimate of working age supported housing:

- First estimate of total stock (Stage 1 - first estimate) **MINUS** older people's housing estimate (Stage 2).
- Compare this first estimate of working age stock with LA level DWP SHBE data on working age Specified Accommodation (SA) claimants in each area.
  - If more WA SA claimants that initial WA estimate (may be higher level of non-registered providers/provision in the area than in general) then adjust local WA estimate up to SA WA level.

Stage 4: final estimate of total supported housing:

- OPH estimate (Stage 2) **PLUS** adjusted working age supported housing adjusted for additional SHBE SA claimants.

Stage 5: split total working age stock estimate into transitional supported housing and long-term supported housing:

- On the basis of London data and national data from the Provider Survey, Commissioner Survey and Supported Housing Review.
  - Inner London LAs: 80 per cent allocated to transitional and 20 per cent allocated to long-term provision.
  - Outer London LAs with above average rates of statutory homelessness: 70 per cent allocated to transitional and 30 per cent allocated to long-term provision.

  - Outer London LAs with below average rates of statutory homelessness: 60 per cent allocated to transitional and 40 per cent allocated to long-term provision.

Stage 6: split total transitional supported housing and long-term supported housing into client groups:

- On the basis of national data from the Provider Survey, Commissioner Survey, Statutory Homeless Statistics and Supported Housing Review, distribute stock within each service type to client groups based on this evidence. The allocation is constrained within the overall proportion of total stock within each service type.

Appendix 2 – CORE data

A2

The MHCLG collects data for all new tenancies in social housing in England through CORE (the continuous recording of lettings and sales in social housing in England). This system records information on new lettings for both local authority and private registered provider properties. This CORE data provides information on the **characteristics of new tenants within supported housing, their household circumstances and the homes they rent**. All providers delivering affordable rent units are obliged to provide data for their supported housing tenancies to CORE.

The tables in this Appendix therefore compile **CORE only for new lettings that providers have indicated are in their supported housing stock.** It needs to be remembered that the characteristics new tenants or the supported housing they live may differ from the total stock of all supported housing tenants and properties. For example, there may be a quicker turnover of working age tenants than pension age tenants. New pension age tenants may enter a new supported housing tenancy and then remain at the property for much of their remaining life. For some working age tenants, supported housing may only be transitional supported housing which they stay in for a limited amount of time.

The CORE data presented on tenant characteristics draws on data from the 2024/25 CORE the sub-national data dashboard and is not weighted for non-response.

Table A2.1: Gender of lead tenant* for new supported housing lettings, 2024-2025, percentages

	Male	Female
Inner London	**63**	**37**
Camden	67	33
Hackney	52	48
Hammersmith and Fulham	63	37
Islington	62	38
Kensington and Chelsea	62	38
Lambeth	70	30
Lewisham	66	34
Newham	66	34
Southwark	70	30
Tower Hamlets	64	35
Wandsworth	60	40
Westminster	64	36
Outer London	**59**	**41**
Barking and Dagenham	62	38
Barnet	55	45
Bexley	50	50
Brent	76	24
Bromley	42	58
Croydon	60	40
Ealing	64	35
Enfield	58	42
Greenwich	48	52
Haringey	61	39
Harrow	51	49
Havering	45	55
Hillingdon	55	43
Hounslow	56	44
Kingston upon Thames	56	44
Merton	64	35
Redbridge	49	51
Richmond upon Thames	62	38
Sutton	55	45
Waltham Forest	68	32
London	**61**	**39**

Source: CORE (Continuous Recording of Lettings and Sales in Social Housing in England), 2024-25
Sample size: 7,636
*Missing data for this field has been imputed for cases when it was refused.
Note: City of London data not reported in CORE 2024-25

Table A2.2: Age of lead* tenant for new supported housing lettings tenants, 2024-2025, percentages

	Working-age (16-64)	Pension-age (65+)
Inner London	**87**	**13**
Camden	88	12
Hackney	94	6
Hammersmith and Fulham	73	27
Islington	78	22
Kensington and Chelsea	76	24
Lambeth	92	8
Lewisham	83	17
Newham	66	34
Southwark	92	8
Tower Hamlets	87	13
Wandsworth	87	13
Westminster	88	12
Outer London	**76**	**24**
Barking and Dagenham	90	10
Barnet	83	17
Bexley	51	49
Brent	79	21
Bromley	72	28
Croydon	80	20
Ealing	79	21
Enfield	93	7
Greenwich	85	15
Haringey	63	37
Harrow	58	42
Havering	57	43
Hillingdon	86	14
Hounslow	89	11
Kingston upon Thames	80	20
Merton	90	10
Redbridge	56	44
Richmond upon Thames	63	37
Sutton	68	32
Waltham Forest	76	24
London	**82**	**18**

Source: CORE (Continuous Recording of Lettings and Sales in Social Housing in England), 2024-25

Sample size: 7,636

*Missing data for this field has been imputed for cases when it was refused.

Note: City of London data not reported in CORE 2024-25.

Table A2.3: Economic status of lead* tenant for new supported housing lettings, 2024-2025, percentages

	Other	Unemployed	Unable to work due to sickness	Retired	Part time work	Full time work
Inner London	**37**	**20**	**23**	**12**	**5**	**2**
Camden	42	10	32	10	4	2
Hackney	42	36	12	7	3	1
Hammersmith and Fulham	25	18	14	28	13	3
Islington	32	19	26	18	4	2
Kensington and Chelsea	26	15	26	22	7	3
Lambeth	44	11	33	7	2	2
Lewisham	44	20	15	15	3	2
Newham	26	13	21	33	4	4
Southwark	31	11	22	8	25	3
Tower Hamlets	17	39	26	13	3	2
Wandsworth	33	7	44	11	3	2
Westminster	51	13	23	12	1	1
Outer London	**28**	**24**	**17**	**22**	**4**	**5**
Barking and Dagenham	19	54	8	8	4	7
Barnet	21	9	43	11	11	4
Bexley	10	2	27	41	8	12
Brent	25	37	16	15	5	2
Bromley	34	8	20	30	2	6
Croydon	30	29	15	19	4	3
Ealing	34	23	15	18	5	3
Enfield	20	16	20	11	10	23
Greenwich	38	13	24	13	5	8
Haringey	38	18	11	27	2	4
Harrow	36	8	19	28	4	4
Havering	14	5	20	45	4	13

	Other	Unemployed	Unable to work due to sickness	Retired	Part time work	Full time work
Hillingdon	41	32	7	14	2	4
Hounslow	57	16	10	10	4	2
Kingston upon Thames	12	53	8	21	4	2
Merton	22	39	22	11	6	<1
Redbridge	6	8	23	55	4	5
Richmond upon Thames	18	3	36	34	4	5
Sutton	29	6	22	38	2	4
Waltham Forest	17	31	13	25	8	6
London	**33**	**22**	**20**	**17**	**5**	**3**

Source: CORE (Continuous Recording of Lettings and Sales in Social Housing in England), 2024-25

Sample size: 7,636

*Missing data for this field has been imputed for cases when it was refused.

Note: City of London data not reported in CORE 2024-25.

Table A2.4: Ethnicity of lead* tenant for new supported housing lettings, 2024-2025, percentages

	White	Black or Black British	Asian or Asian British	Mixed	Other ethnic group
Inner London	**52**	**27**	**9**	**7**	**5**
Camden	49	23	10	8	10
Hackney	71	19	4	5	2
Hammersmith and Fulham	54	25	6	7	8
Islington	49	30	7	7	7
Kensington and Chelsea	55	20	2	8	15
Lambeth	45	39	7	6	2
Lewisham	42	34	8	9	7
Newham	47	26	14	11	2
Southwark	49	37	6	4	4
Tower Hamlets	40	22	26	7	4
Wandsworth	41	29	11	11	9
Westminster	58	19	9	4	10
Outer London	**46**	**31**	**11**	**5**	**6**
Barking and Dagenham	45	32	12	7	4
Barnet	49	17	9	15	9
Bexley	79	14	2	5	<1
Brent	33	45	9	3	9
Bromley	62	20	10	3	6
Croydon	32	44	15	3	6
Ealing	28	33	20	8	12
Enfield	30	45	7	13	5
Greenwich	55	27	10	6	2
Haringey	45	36	9	6	5
Harrow	43	18	19	6	14
Havering	76	17	2	4	1
Hillingdon	50	25	8	5	13
Hounslow	51	15	27	4	3
Kingston upon Thames	43	33	10	5	9
Merton	47	31	7	9	5
Redbridge	59	18	18	1	5
Richmond upon Thames	75	9	7	6	3
Sutton	67	23	4	4	2
Waltham Forest	30	43	10	6	11
London	**50**	**29**	**10**	**6**	**6**

Source: CORE (Continuous Recording of Lettings and Sales in Social Housing in England), 2024-25

Sample size: 7,636

*Missing data for this field has been imputed for cases when it was refused.

Note: City of London data not reported in CORE 2024-25.

Table A2.5: Homeless status of household prior to new supported housing letting, 2024-2025, percentages

	Not statutorily homeless	Statutorily homeless
Inner London	**63**	**35**
Camden	55	45
Hackney	79	21
Hammersmith and Fulham	70	30
Islington	67	33
Kensington and Chelsea	63	37
Lambeth	60	40
Lewisham	62	38
Newham	78	22
Southwark	73	27
Tower Hamlets	56	44
Wandsworth	77	23
Westminster	42	58
Outer London	**61**	**39**
Barking and Dagenham	49	51
Barnet	94	6
Bexley	59	41
Brent	40	60
Bromley	77	23
Croydon	55	45
Ealing	44	56
Enfield	94	6
Greenwich	47	53
Haringey	76	24
Harrow	86	14
Havering	88	12
Hillingdon	66	34
Hounslow	61	39
Kingston upon Thames	46	54
Merton	50	50
Redbridge	90	10
Richmond upon Thames	75	25
Sutton	71	29
Waltham Forest	67	33
London	**63**	**37**

Source: CORE (Continuous Recording of Lettings and Sales in Social Housing in England), 2024-25

Sample size: 7,636

Note: City of London data not reported in CORE 2024-25.

Table A2.6: Household composition for new supported housing lettings, 2024-2025, percentages

	Single male	Single female	Single elder	Elder couple	Single female with child(ren)	Other*
Inner London	**57**	**30**	**12**	**<1**	**1**	**1**
Camden	62	25	10	<1	2	1
Hackney	49	46	5	<1	<1	<1
Hammersmith and Fulham	51	22	25	1	<1	2
Islington	51	27	19	<1	2	<1
Kensington and Chelsea	52	25	19	2	1	1
Lambeth	66	26	7	<1	1	<1
Lewisham	58	23	16	<1	3	<1
Newham	47	17	34	<1	2	<1
Southwark	66	23	7	<1	3	1
Tower Hamlets	58	28	12	1	<1	2
Wandsworth	51	34	12	1	3	<1
Westminster	58	28	11	<1	2	1
Outer London	**47**	**26**	**20**	**2**	**4**	**2**
Barking and Dagenham	62	27	9	<1	1	<1
Barnet	46	36	8	4	<1	6
Bexley	29	25	41	2	<1	4
Brent	63	17	20	<1	<1	<1
Bromley	27	28	23	3	17	2
Croydon	50	25	18	1	6	1
Ealing	54	23	15	4	3	3
Enfield	56	38	6	<1	<1	<1
Greenwich	41	38	13	1	5	2
Haringey	42	22	30	<1	<1	5
Harrow	41	20	29	6	<1	4
Havering	26	24	34	4	7	6
Hillingdon	46	39	9	1	1	3

	Single male	Single female	Single elder	Elder couple	Single female with child(ren)	Other*
Hounslow	52	24	11	<1	13	1
Kingston upon Thames	46	29	15	4	4	3
Merton	57	30	9	1	<1	2
Redbridge	26	25	42	3	2	2
Richmond upon Thames	45	18	32	2	1	2
Sutton	44	25	25	5	<1	2
Waltham Forest	56	22	18	3	<1	1
London	**52**	**28**	**15**	**1**	**2**	**1**

Source: CORE (Continuous Recording of Lettings and Sales in Social Housing in England), 2024-25

Sample size: 7,503

*Includes: Other, Couple, Couple with child(ren) and Single male with child(ren).

Note: City of London data not reported in CORE 2024-25.

Table A2.7: Housing related benefits received by household in new supported housing letting, 2024-2025, percentages

	Housing Benefit	Don't know	Universal Credit housing element	No housing related benefits
Inner London	**44**	**25**	**24**	**8**
Camden	60	9	20	11
Hackney	40	35	17	8
Hammersmith and Fulham	30	26	33	12
Islington	38	32	20	10
Kensington and Chelsea	64	12	15	9
Lambeth	48	12	34	6
Lewisham	45	20	31	4
Newham	53	28	13	6
Southwark	30	49	15	6
Tower Hamlets	23	44	25	8
Wandsworth	43	26	15	16
Westminster	46	22	26	5
Outer London	**50**	**20**	**20**	**9**
Barking and Dagenham	79	11	4	6
Barnet	26	38	19	17
Bexley	22	22	36	20
Brent	44	13	40	3
Bromley	33	24	35	9
Croydon	46	23	24	8
Ealing	71	12	11	6
Enfield	19	54	13	13
Greenwich	53	12	27	9
Haringey	49	9	24	17
Harrow	58	23	13	6
Havering	29	37	19	15
Hillingdon	63	26	4	7
Hounslow	74	16	8	2
Kingston upon Thames	80	9	6	6
Merton	60	30	6	4
Redbridge	29	48	10	13
Richmond upon Thames	34	18	42	6
Sutton	42	42	7	8
Waltham Forest	57	15	16	12
London	**47**	**23**	**22**	**8**

Source: CORE (Continuous Recording of Lettings and Sales in Social Housing in England), 2024-25

Sample size: 6,686

Note: City of London data not reported in CORE 2024-25.

Table A2.8: Percentage of new supported housing lettings in a household with physical/mental health conditions/illnesses, lasting or expected to last for 12+ months, 2024-2025

	No	Yes
Inner London	**47**	**53**
Camden	46	54
Hackney	66	34
Hammersmith and Fulham	52	48
Islington	50	50
Kensington and Chelsea	50	50
Lambeth	37	63
Lewisham	43	57
Newham	55	45
Southwark	44	56
Tower Hamlets	58	43
Wandsworth	41	59
Westminster	46	54
Outer London	**59**	**41**
Barking and Dagenham	88	12
Barnet	36	64
Bexley	31	69
Brent	56	44
Bromley	50	50
Croydon	52	48
Ealing	73	27
Enfield	76	24
Greenwich	57	43
Haringey	60	40
Harrow	56	44
Havering	30	70
Hillingdon	60	40
Hounslow	52	48
Kingston upon Thames	81	19
Merton	68	32
Redbridge	45	55
Richmond upon Thames	53	47
Sutton	30	70
Waltham Forest	67	33
London	**54**	**46**

Source: CORE (Continuous Recording of Lettings and Sales in Social Housing in England), 2024-25

Sample size: 5,250

Note: City of London data not reported in CORE 2024-25.

Table A2.9: Percentage of tenants in a new supported housing letting with disability-related adaptation requirements, 2024-2025

	No	Yes
Inner London	**91**	**9**
Camden	96	4
Hackney	93	7
Hammersmith and Fulham	96	4
Islington	90	10
Kensington and Chelsea	88	12
Lambeth	88	12
Lewisham	89	11
Newham	74	26
Southwark	91	9
Tower Hamlets	96	4
Wandsworth	93	7
Westminster	94	6
Outer London	**87**	**13**
Barking and Dagenham	90	10
Barnet	89	11
Bexley	71	29
Brent	86	14
Bromley	86	14
Croydon	93	7
Ealing	96	4
Enfield	97	3
Greenwich	93	7
Haringey	84	16
Harrow	95	5
Havering	61	39
Hillingdon	93	7
Hounslow	97	3
Kingston upon Thames	94	6
Merton	90	10
Redbridge	52	48
Richmond upon Thames	82	18
Sutton	77	23
Waltham Forest	76	24
London	**89**	**11**

Source: CORE (Continuous Recording of Lettings and Sales in Social Housing in England), 2024-25

Sample size: 5,427

Note: City of London data not reported in CORE 2024-25.

Table A2.10: Level of required support services for tenants in new supported housing lettings, 2024-2025, percentages

	Medium levels of support to an accommodation based support service	Low levels of support to an accommodation based support service	High levels of care/support to care home/similar provision	Nursing care services to a care home
Inner London	**43**	**23**	**33**	**<1**
Camden	57	6	36	<1
Hackney	11	29	60	<1
Hammersmith and Fulham	59	19	22	<1
Islington	72	16	11	<1
Kensington and Chelsea	81	13	6	<1
Lambeth	41	22	37	<1
Lewisham	19	25	57	<1
Newham	59	28	13	<1
Southwark	34	42	24	<1
Tower Hamlets	60	30	11	<1
Wandsworth	58	22	19	1
Westminster	61	22	17	<1
Outer London	**48**	**33**	**19**	**<1**
Barking and Dagenham	63	31	7	<1
Barnet	58	21	21	<1
Bexley	41	41	18	<1
Brent	31	28	41	<1
Bromley	61	35	5	<1
Croydon	38	35	27	<1
Ealing	60	36	4	<1
Enfield	46	46	8	<1
Greenwich	60	20	18	2
Haringey	17	60	22	<1
Harrow	54	44	1	<1
Havering	39	58	3	<1
Hillingdon	76	19	5	<1
Hounslow	42	34	24	<1
Kingston upon Thames	33	13	54	<1
Merton	34	23	43	<1
Redbridge	51	30	19	<1
Richmond upon Thames	75	7	18	<1
Sutton	53	26	21	<1
Waltham Forest	45	52	3	<1
London	**45**	**28**	**26**	**<1**

Source: CORE (Continuous Recording of Lettings and Sales in Social Housing in England), 2024-25

Sample size: 7,636

Note: City of London data not reported in CORE 2024-25.

Table A2.11: Percentage of new supported housing lettings that are for new or existing tenants in the social housing sector, 2024-2025

	Already in the sector	New to the sector
Inner London	**31**	**69**
Camden	38	62
Hackney	12	88
Hammersmith & Fulham	39	61
Islington	38	62
Kensington & Chelsea	38	63
Lambeth	40	60
Lewisham	34	66
Newham	35	65
Southwark	34	66
Tower Hamlets	23	77
Wandsworth	38	62
Westminster	39	61
Outer London	**25**	**75**
Barking & Dagenham	14	86
Barnet	25	75
Bexley	20	80
Brent	25	75
Bromley	25	75
Croydon	21	79
Ealing	23	77
Enfield	32	68
Greenwich	28	72
Haringey	21	79
Harrow	18	82
Havering	37	63
Hillingdon	17	83
Hounslow	22	78
Kingston upon Thames	24	76
Merton	26	74
Redbridge	27	73
Richmond upon Thames	52	48
Sutton	29	71
Waltham Forest	39	61
London	**28**	**72**

Source: CORE (Continuous Recording of Lettings and Sales in Social Housing in England), 2024-25

Sample size: 7,636

Note: City of London data not reported in CORE 2024-25.

Table A2.11: Average household income of tenants in new supported housing lettings, 2024-2025

	Average of Income (Median weekly Income (£))	No of incomes used for median:
Inner London		
Camden	**187**	34
Hackney	**368**	35
Hammersmith & Fulham	**334**	25
Islington	**258**	20
Kensington & Chelsea	**293**	22
Lambeth	**249**	68
Lewisham	**242**	23
Newham	**218**	10
Southwark	**209**	28
Tower Hamlets	**404**	3
Wandsworth	**274**	24
Westminster	**276**	24
Outer London		
Barking & Dagenham	**285**	8
Barnet	**400**	7
Bexley	**410**	25
Brent	**231**	38
Bromley	**307**	36
Croydon	**184**	32
Ealing	**336**	21
Enfield	**415**	3
Greenwich	**276**	24
Haringey	**350**	21
Harrow	**-**	2
Havering	**234**	5
Hillingdon	**182**	9
Hounslow	**310**	6
Kingston upon Thames	**369**	3
Merton	**354**	6
Redbridge	**187**	3
Richmond upon Thames	**300**	21
Sutton	**304**	8
Waltham Forest	**266**	30
London	**277**	**624**

Source: CORE (Continuous Recording of Lettings and Sales in Social Housing in England), 2024-25

Note: City of London data not reported in CORE 2024-25.

Table A2.12: Unit type for new supported housing tenancies, 2024-2025, percentages

	Self-contained flat or bedsit with common facilities	Shared house or hostel	Self-contained flat or bedsit	Shared flat	Self-contained house	Bungalow
Inner London	**36**	**35**	**27**	**2**	**<1**	**<1**
Camden	10	62	27	<1	<1	<1
Hackney	66	16	16	1	<1	<1
Hammersmith & Fulham	19	38	41	1	<1	1
Islington	21	42	35	1	<1	<1
Kensington & Chelsea	32	21	44	3	<1	<1
Lambeth	12	64	23	1	<1	<1
Lewisham	59	5	33	<1	3	<1
Newham	38	10	52	<1	<1	<1
Southwark	58	17	19	6	<1	<1
Tower Hamlets	60	4	33	4	<1	<1
Wandsworth	12	43	36	9	<1	<1
Westminster	15	68	13	4	<1	<1
Outer London	**33**	**34**	**29**	**3**	**1**	**<1**
Barking & Dagenham	26	61	12	<1	<1	1
Barnet	42	34	23	<1	2	<1
Bexley	60	<1	37	1	<1	2
Brent	20	61	15	<1	4	<1
Bromley	43	26	29	<1	2	1
Croydon	21	31	32	16	<1	<1
Ealing	36	33	29	1	<1	1
Enfield	23	48	27	2	<1	<1
Greenwich	16	60	22	<1	2	<1
Haringey	9	30	61	<1	<1	<1
Harrow	49	11	40	<1	<1	<1
Havering	44	8	48	<1	<1	<1

	Self-contained flat or bedsit with common facilities	Shared house or hostel	Self-contained flat or bedsit	Shared flat	Self-contained house	Bungalow
Hillingdon	35	5	31	29	<1	1
Hounslow	72	6	20	2	<1	<1
Kingston upon Thames	25	53	21	<1	1	<1
Merton	41	40	18	1	<1	<1
Redbridge	53	7	40	<1	<1	<1
Richmond upon Thames	40	15	43	1	1	<1
Sutton	71	11	17	1	<1	<1
Waltham Forest	33	32	35	<1	<1	<1
London	**34**	**34**	**28**	**3**	**1**	**<1**

Source: CORE (Continuous Recording of Lettings and Sales in Social Housing in England), 2024-25

Sample size: 7,636

Note: City of London data not reported in CORE 2024-25.

Table A2.13: Percentage of new supported housing lettings within a property which is designed or adapted to wheelchair or accessible standards, 2024-2025

	No	Yes
Inner London	**52**	**48**
Camden	64	36
Hackney	36	64
Hammersmith & Fulham	46	54
Islington	70	30
Kensington & Chelsea	64	36
Lambeth	68	32
Lewisham	49	51
Newham	71	29
Southwark	41	59
Tower Hamlets	32	68
Wandsworth	72	28
Westminster	48	52
Outer London	52	48
Barking & Dagenham	86	14
Barnet	51	49
Bexley	10	90
Brent	34	66
Bromley	65	35
Croydon	58	42
Ealing	66	34
Enfield	67	33
Greenwich	17	83
Haringey	75	25
Harrow	18	82
Havering	27	73
Hillingdon	81	19
Hounslow	67	33
Kingston upon Thames	43	57
Merton	45	55
Redbridge	13	87
Richmond upon Thames	28	72
Sutton	54	46
Waltham Forest	52	48
London	**52**	**48**

Source: CORE (Continuous Recording of Lettings and Sales in Social Housing in England), 2024-25

Sample size: 7,473

Note: City of London data not reported in CORE 2024-25.

Table A2.14: Primary client group for the supported housing scheme that the new supported housing letting is within, 2022-2023, percentages

	Older people with support needs	Homeless people and rough sleepers with support needs	Young parents/young people at risk	Vulnerable women and people at risk of domestic abuse	People with illness and/or disability	Other	People with substance abuse problems
Inner London	**29**	**31**	**17**	**9**	**9**	**2**	**3**
Camden	27	44	2	13	2	5	7
Hackney	20	10	61	3	5	1	<1
Hammersmith & Fulham	50	12	8	18	12	<1	<1
Islington	30	35	7	17	1	<1	9
Kensington & Chelsea	28	53	7	<1	4	7	<1
Lambeth	33	34	11	9	11	1	<1
Lewisham	18	29	22	17	11	<1	3
Newham	80	7	1	<1	12	<1	<1
Southwark	48	37	1	5	9	<1	<1
Tower Hamlets	22	43	7	11	10	2	6
Wandsworth	40	7	9	12	19	5	7
Westminster	17	52	1	9	14	<1	7
Outer London	**38**	**27**	**15**	**10**	**6**	**3**	**1**
Barking and Dagenham	23	64	<1	11	1	<1	<1
Barnet	68	<1	<1	17	15	<1	<1
Bexley	99	<1	<1	<1	1	<1	<1
Brent	24	61	<1	2	<1	9	4
Bromley	55	13	6	22	2	3	<1
Croydon	15	28	29	16	9	3	1
Ealing	21	11	62	<1	6	<1	<1
Enfield	30	45	10	<1	15	<1	<1
Greenwich	13	15	34	19	7	11	2
Haringey	70	16	6	<1	5	3	<1
Harrow	61	<1	39	<1	<1	<1	<1

	Older people with support needs	Homeless people and rough sleepers with support needs	Young parents/young people at risk	Vulnerable women and people at risk of domestic abuse	People with illness and/or disability	Other	People with substance abuse problems
Havering	72	<1	<1	9	19	<1	<1
Hillingdon	25	69	<1	4	2	<1	<1
Hounslow	25	7	22	43	3	<1	<1
Kingston upon Thames	39	43	<1	14	4	<1	<1
Merton	59	14	25	<1	2	<1	<1
Redbridge	72	13	<1	9	7	<1	<1
Richmond upon Thames	62	18	<1	<1	13	6	<1
Sutton	67	8	6	<1	19	<1	<1
Waltham Forest	30	26	6	23	8	8	<1
London	**33**	**29**	**16**	**10**	**7**	**2**	**2**

Source: CORE (Continuous Recording of Lettings and Sales in Social Housing in England), 2022-23
Sample size: 6,345
Note: City of London data available for 2022-23 but <10 households so data excluded.