

GREATER **LONDON** AUTHORITY

FOCUS ON LONDON

2011



HOUSING: A GROWING CITY

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Introduction

With the highest average incomes in the country but the least space to grow, demand for housing in London has long outstripped supply, resulting in higher housing costs and rising levels of overcrowding. The pressures of housing demand in London have grown in recent years, in part due to fewer people leaving London to buy homes in other regions. But while new supply during the recession held up better in London than in other regions, it needs to increase significantly in order to meet housing needs and reduce housing costs to more affordable levels.

This edition of *Focus on London* looks at housing trends in London, from the demand/supply imbalance to the consequences for affordability and housing need.

Summary

- > London's population of 7.9 million people live in 3.3 million households. Over the next twenty years London's population is expected to grow by around 1 million.
- > Nearly half of London's households live in flats, compared to 14 per cent in the rest of England.
- > Just over half of households in London own their own homes, but this has fallen by six percentage points since 2000.
- > The private rented sector accounts for less than a quarter of households in London but almost two-thirds of recent moves.
- > The fall in home sales has led to a drop in the flow of people from London to the rest of the UK while migration into London from other regions has remained high adding to the housing pressures in the capital.
- > Average house prices in London have risen to £343,000 in March 2011, up 5.6 per cent in the last 12 months, more than in any other region.
- > House prices are 61 per cent higher in London than the national average, while median social rents are 17 per cent higher, and private rents are 36 per cent higher in London.
- > By the end of 2010 the ratio of lower quartile house prices to lower quartile earnings had risen to 9.0 in London.
- > There are an estimated 224,000 households living in overcrowded accommodation in London. London has the most overcrowded households of any region and has one of the lowest levels of under-occupation.

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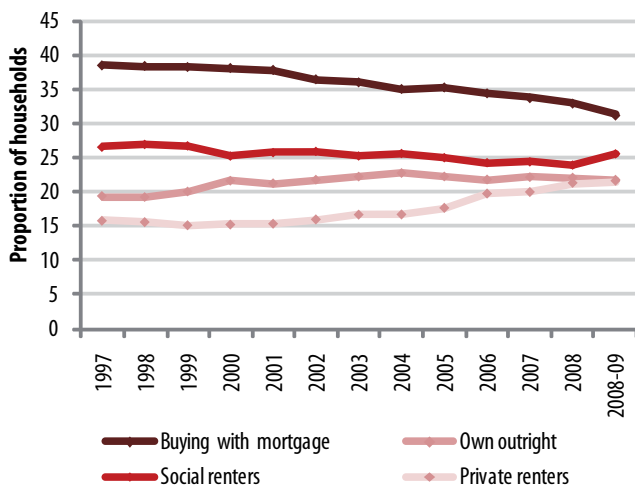
London's Housing Stock

London's population of 7.9 million people live in 3.3 million households. This gives an average household size of 2.37 people in 2011, which has fallen from 2.47 in 1991 and is projected to fall further to 2.25 by 2031¹.

London is a built-up urban area that includes the most densely populated parts of England, so its housing stock differs substantially from that in the rest of the country. Nearly half of London's households live in flats, compared to just 14 per cent in the rest of England. Space in London is more constrained too: just half of London's homes have three bedrooms or more, compared to two thirds in the rest of the country².

Just over half of households in London own their own homes (22 per cent own outright and 31 per cent have a mortgage), while 26 per cent rent from a social landlord and 22 per cent from a private landlord³. Since the start of the 21st century the proportion of households who own their home has fallen by around six percentage points and the number who rent privately has risen by a similar amount, with the proportion renting from a social landlord staying broadly static (Chart 1). Tenure patterns vary widely at borough level, for example less than a third of households in Tower Hamlets and Westminster own their own homes, compared to almost four-fifths in Bexley and Havering (Figure 1)⁴.

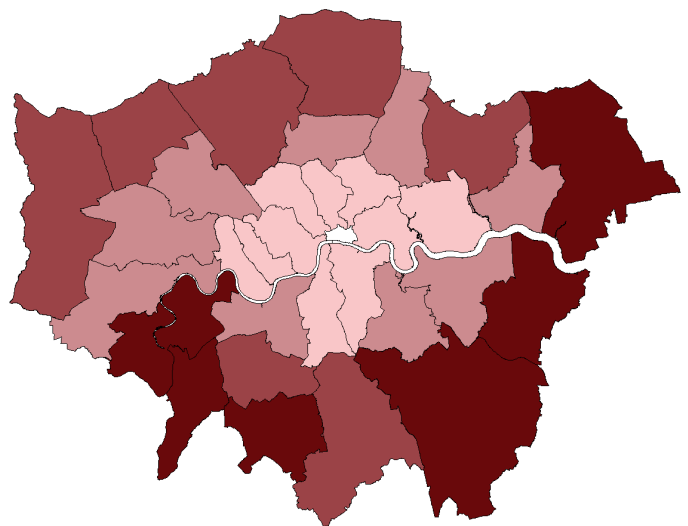
Chart 1: Trend in Household Tenure, London, 1997 to 2008/09



Source: DCLG English Housing Survey: full household sample

“Since the start of the 21st century the proportion of households who own their home has fallen by around six percentage points.”

Figure 1: Proportion of Households Who Own Their Home by Borough, 2009



Proportion of Households Owned

- 70 to 79 (6)
- 60 to 70 (7)
- 45 to 60 (9)
- 29 to 45 (10)
- No data (1)

Source: Annual Population Survey 2009

Housing Demand

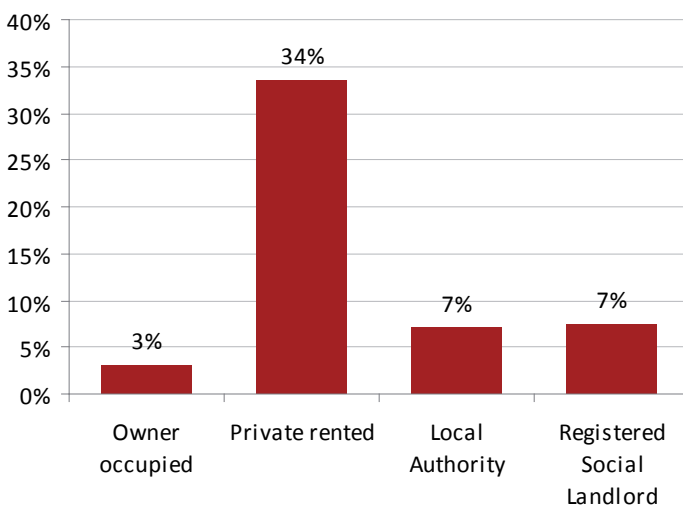
Over the next twenty years London's population is expected to grow by around 1 million, and the number of households by nearly 700,000⁵. These population trends, coupled with an economy which has in general suffered less from the recession than the rest of the country, will mean strong growth in demand for housing in the capital. The Mayor's Draft Replacement London Plan sets out his approach to meeting this demand, including annual average housing provision targets of 33,380 across London as a whole⁶.

As well as demand for new housing, London's population dynamics result in a great deal of internal churn, with one in ten London households having moved in the last year⁷. This dynamism is largely found in the private rented sector, which accounts for just over a fifth of households in London but over two thirds of recent moves in 2009/10⁸. In more typical recent years, moves in privately rented housing have accounted for more than half of all moves in London, but in the last two years owner occupier moves in London and the rest of England have fallen significantly as a result of the financial crisis and associated severe constraints on mortgage lending⁹.

As many moves out of London in a typical year are to owner occupied homes in neighbouring regions, the fall in home sales due to mortgage lending constraints has led to a drop in the flow of people from London to the rest of the UK, particularly among those aged between 30 and 60¹⁰. Migration into London from other regions has remained high (in fact has actually increased in recent years), so net out-migration to the rest of the UK is currently at a relatively low level compared to recent years, adding to the housing pressures in the capital¹¹. Mortgage availability and the overall state of the housing market will be the key factors in determining whether this trend passes or becomes a more long-lasting feature of London's population flows.

“Net out-migration to the rest of the UK is currently at a very low level, adding to the housing pressures in the capital”

Chart 2: Length of Current Residence of Household is Less Than One Year, London 2009/10



Source: Integrated Household Survey

Housing Supply

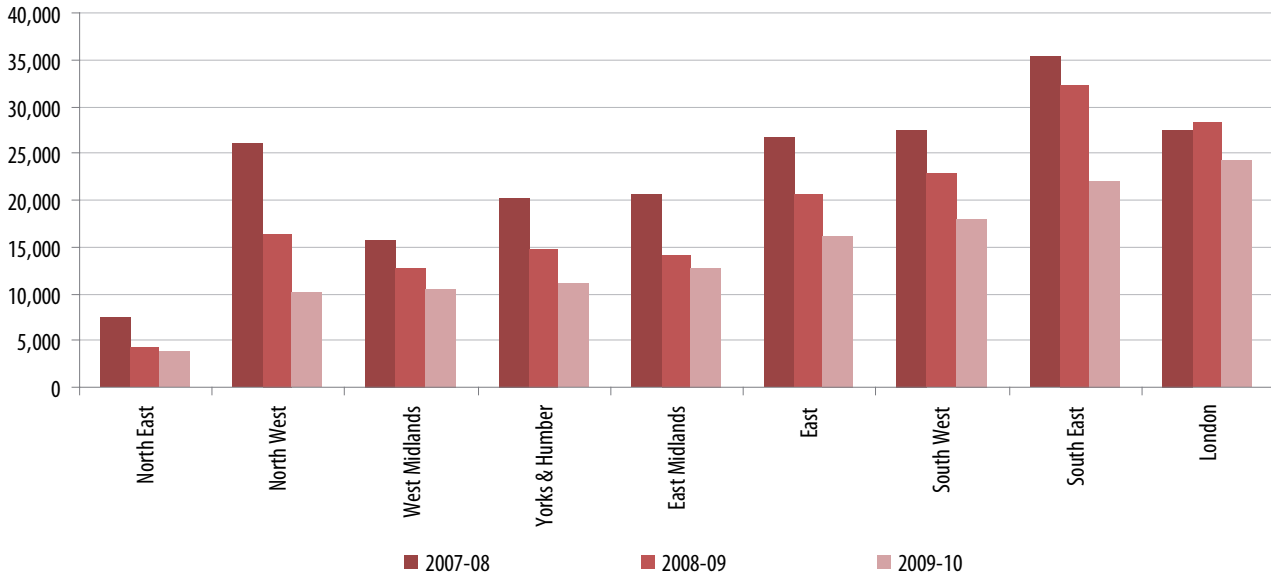
The main measure of new housing supply is net 'conventional' additions to the stock, which comprises new build, conversions of existing homes, and changes of use from industrial or commercial to housing. According to this measure there was a net new housing supply of 24,300 homes in London in 2009/10. Although this was a drop of 14 per cent from 2008/09, most other regions saw even larger falls (Chart 3), and London's share of national net housing supply rose to 19 per cent, up from 13 per cent in 2007/08¹².

Net conventional supply varied widely among London boroughs in 2009/10, from 41 in the City of London and 139 in Kingston upon Thames to 1,627 in Hackney and 2,465 in Tower Hamlets¹³. Much of this variation is driven by differences in the availability of developable sites, which are more numerous in areas which have lost a lot of manufacturing and other industry in recent decades.

New build accounted for 81 per cent of net conventional supply in London in 2009/10, conversions 8 per cent and changes of use 11 per cent. Again, these figures varied widely between boroughs. Notably, 65 per cent of Greenwich's net conventional supply of 548 came from change of use, while 31 per cent of supply in Enfield was from conversions. Kensington and Chelsea was the only borough with negative supply from conversions, implying that in this extremely high-cost area conversions of houses into flats were outnumbered by 'de-conversions' of flats into houses¹⁴.

“In 2009/10 London's share of national net housing supply rose to 19 per cent, up from 13 per cent in 2007/08”

Chart 3: Annual Net Housing Supply by Region, 2007-08 - 2009-10



Source: Communities and Local Government

New homes are built at far higher average densities in London than in other regions. The average density of new build in 2009/10 was 121 dwellings per hectare (dph) in London, nearly three times the next-highest region and the England average (both 43 dph)¹⁵ (Chart 4). 98 per cent of new homes in London were built on previously developed land in London, compared to 77 per cent in England as a whole¹⁶.

The target in the Mayor’s draft London Housing Strategy of delivering 50,000 affordable homes in his first term encompasses a definition of delivery that goes beyond new conventional supply to encompass other additions to the stock of affordable housing, such as assisted purchases on the open market and the acquisition of existing properties by housing associations. According to this definition there were 13,570 affordable homes delivered in London in 2009/10, the highest number of any region and a slight increase on the year before¹⁸.

Chart 4: Density of New Dwellings Built, 1999 to 2009



“ There were 13,570 affordable homes delivered in London in 2009/10, the highest number of any region and a slight increase on the year before ”

Source: Communities and Local Government

Affordable housing supply, comprising social rented and intermediate housing, has accounted for 36 to 37 per cent of total net conventional supply in London for the past three years, falling from 10,763 in 2008/09 to 8,993 in 2009/10. Affordable housing over the three year period varied from 0 per cent of net conventional supply in the City of London and 14 per cent in Redbridge to 53 per cent in Brent and 54 per cent in Hammersmith and Fulham. At the London-wide level affordable supply was split evenly between social rented and intermediate housing, while at borough level social rented housing ranged from 11 per cent of affordable supply in Wandsworth to 81 per cent in Westminster¹⁷.

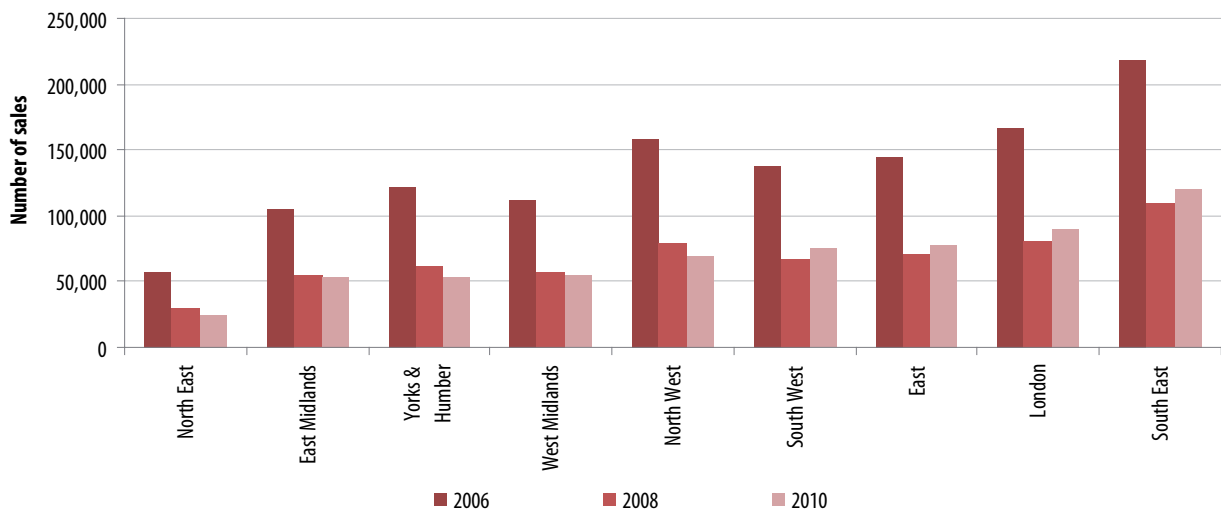
Housing Market and Housing Costs

As mentioned above, the financial crisis and the associated severe constraints on mortgage availability resulted in a sharp drop in home sales in London and in the rest of the country. There were an estimated 91,000 housing sales in London in 2010, up from 75,000 in 2009 but still far below the recent peak of 167,000 in 2006. A regional comparison shows that sales in the southern regions of England increased between 2008 and 2010 but fell slightly in the Midlands and the North¹⁹ (Chart 5).

The mix-adjusted average house price in London was £343,000 in March 2011, compared to an England-wide average of £213,000. Average house prices in London have also risen 5.6 per cent in the last 12 months, faster than in any other region²⁰ (Chart 6).

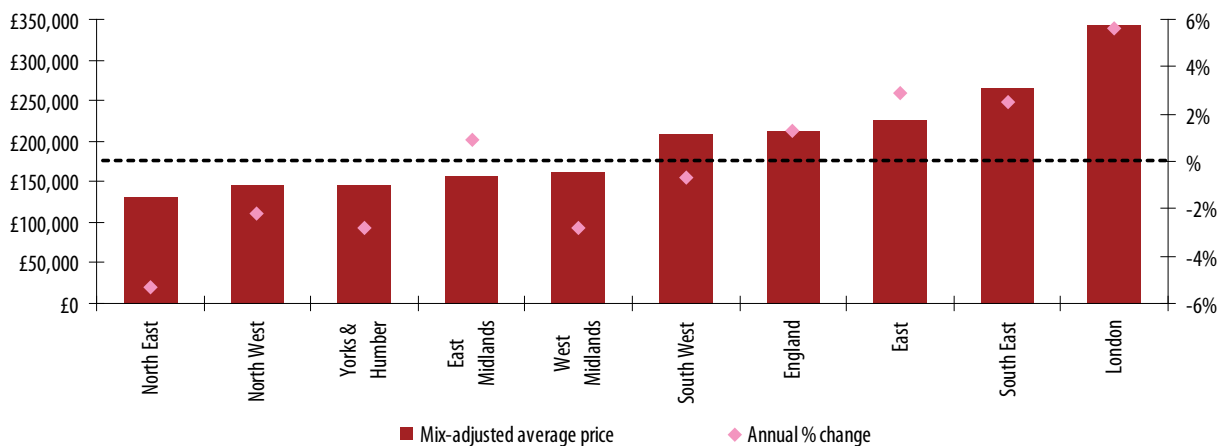
“Sales in the southern regions of England increased between 2008 and 2010 but fell slightly in the Midlands and the North”

Chart 5: Land Registry Sales by Region, 2006 to 2009



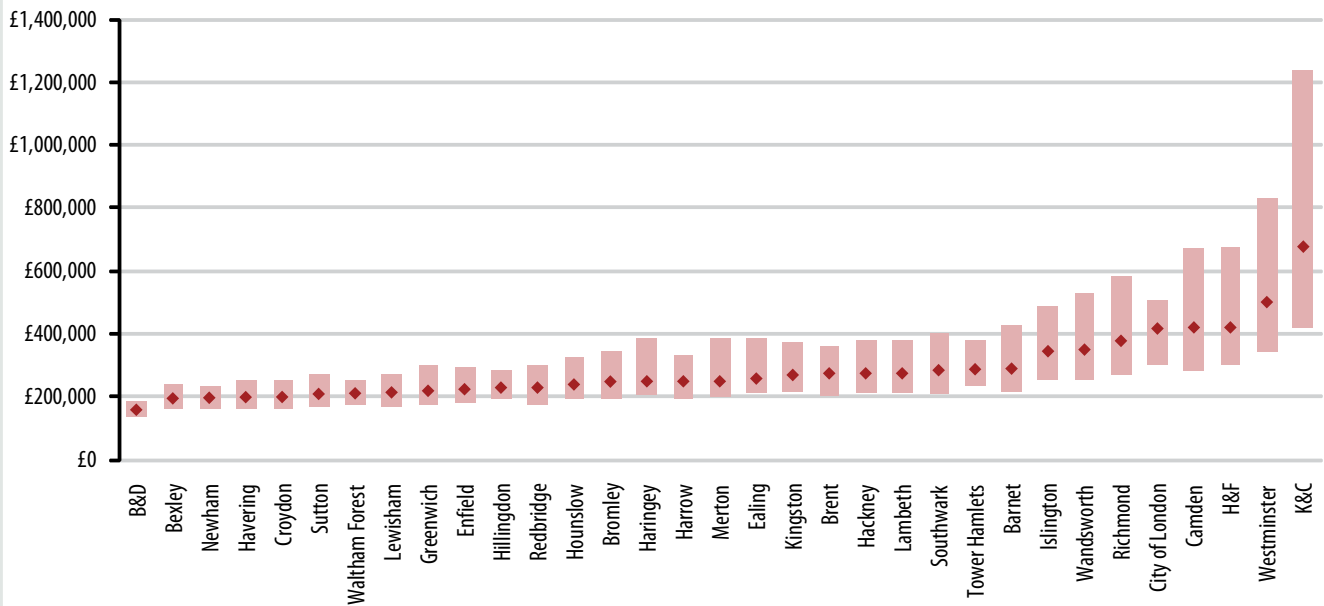
Source: CML statistics

Chart 6: Mix-adjusted Average House Prices and Annual Change, March 2011



Source: Communities and Local Government, Tables 592 and 590

Chart 7: Median and Inter-quartile House Prices by Borough, 2009



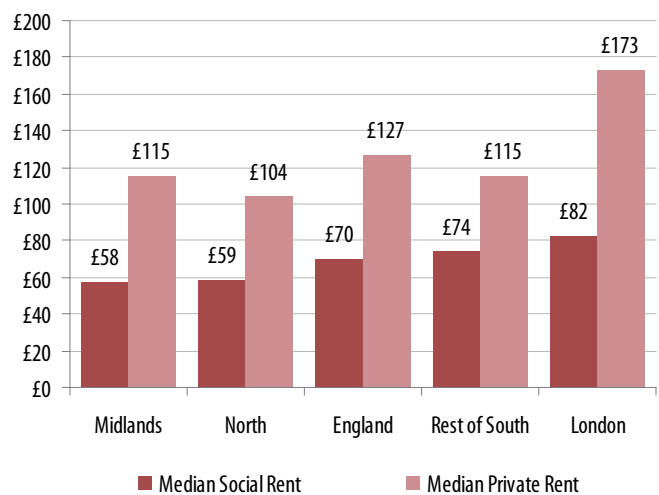
Source: Neighbourhood Statistics

There is wide variation in house prices between London boroughs, not just in terms of the average but also in the range of prices to be found in each area. Chart 7, based on data from 2009, shows the median house price in each borough (marked with a diamond) and the range between the lower and upper quartile prices (i.e. the 25 per cent and 75 per cent points in the distribution)²¹. Barking and Dagenham has both the lowest average price (£160,000) and the smallest range between lower and upper quartile prices (£45,000), while at the other end of the scale Kensington and Chelsea has an average price of £675,000 and an interquartile range of £820,000.

As with house prices, average rents are also significantly higher in London than in other regions. At £82 a week, median social rents in London are 17 per cent higher than the national average, while private rents are 36 per cent higher in London at £173 a week (note, these are gross rents, before any rebates, benefits or allowances). (see Chart 8).

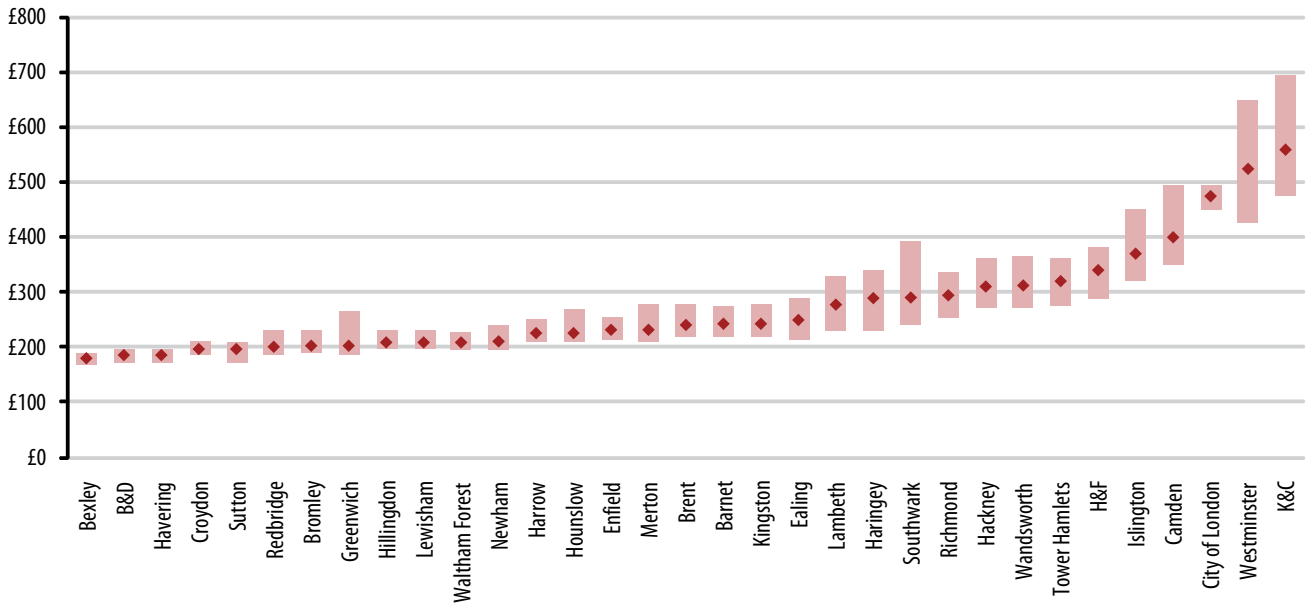
“Median social rents in London are 17 per cent higher than the national average, while private rents are 36 per cent higher in London”

Chart 8: Median Weekly Social and Private Rents by Broad Region, 2008/09



Source: DCLG English Housing Survey, full household sample

Chart 9: Median and Inter-quartile Weekly Private Rents by Borough, 2010/11



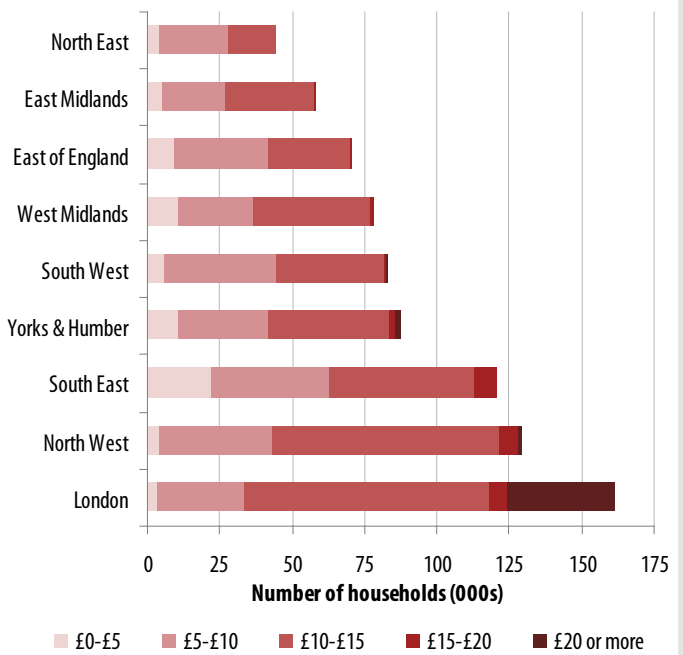
Source: GLA, London Rents Map

Chart 9 shows the median and interquartile range of weekly private rents for two bedroom homes in each London borough²². The chart indicates more variation in average rents *between* boroughs than there is for prices, but less variation *within* boroughs.

The next few years are expected to see significant changes in the private rental market with the introduction of the government’s reforms of Local Housing Allowance (LHA, housing benefit for privately rented homes). Chart 10 shows the government’s estimates of expected weekly monetary losses to privately renting tenants in each region as a result of the LHA changes due to come into effect in 2011/12. London will be hit hardest, with an estimated 159,000 households due to lose out, nearly a quarter by £20 or more a week²³.

“As a result of the LHA changes, London will be hit hardest, with an estimated 159,000 households due to lose out, nearly a quarter by £20 or more a week”

Chart 10: Estimated Distribution of Weekly Losses from Local Housing Allowance Cuts, by Region

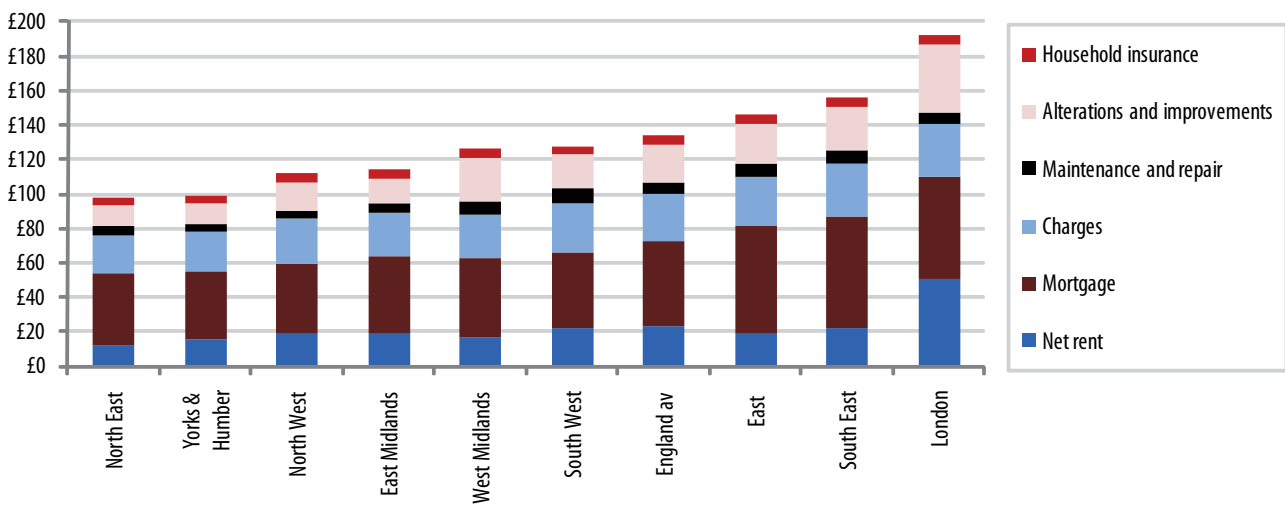


Source: Calculated by GLA from data published by DWP

The recent ONS report on Family Spending²⁴, based on the Living Costs and Food Survey, includes a detailed breakdown of expenditure on housing (excluding Housing purchase transaction costs, moving costs, and second home costs). **Chart 11** below shows average weekly housing expenditure by category for each English region (excluding categories where results were not statistically significant). Note that as these figures are averaged across the whole region, they include both rent and mortgage costs, even though very few households will be paying both.

The Family Spending report also separates out expenditure by private and social tenants on rent, and by mortgage holders on their mortgage. Average weekly expenditures on each category by region are shown in **Chart 12** below²⁵. Average expenditures on both *net* rent (i.e. after rebates, benefits and allowances) and mortgage payments are almost 50 per cent higher in London than in England as a whole.

Chart 11: Average Weekly Housing Expenditure by Region, 2009

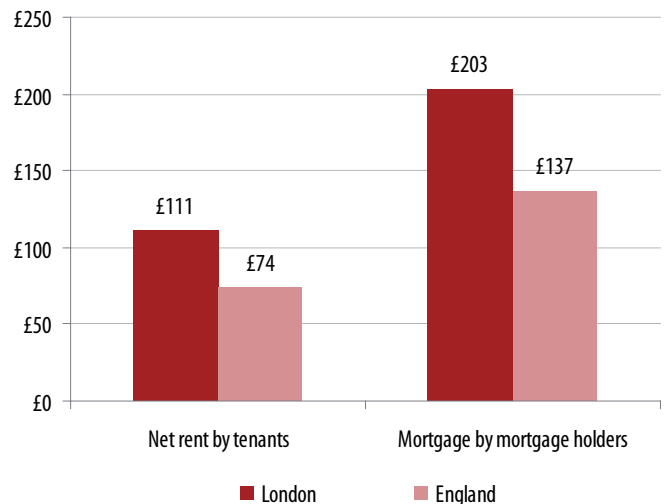


Source: Living Costs and Food Survey

Average weekly housing expenditure is significantly higher in London than in other regions, and almost 45 per cent higher than the England average. The largest difference is in the average amount spent on rent (both private and social), which is high in London due to both the size of its rented sector and its higher rents.

“Average expenditures on both rent and mortgage payments are almost 50 per cent higher in London than in England as a whole”

Chart 12: Average Weekly Spending on Rent by Tenants, and Mortgage by Mortgage Holders

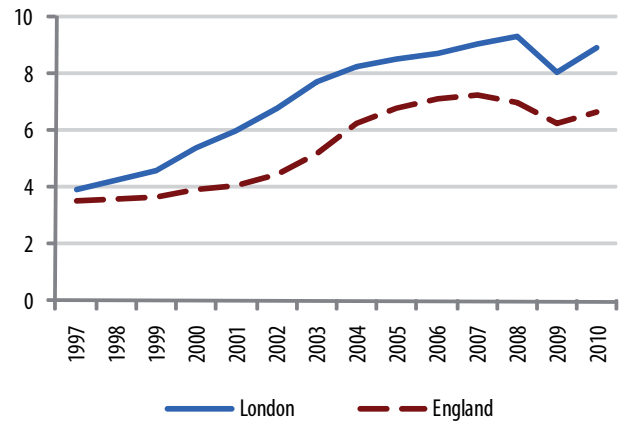


Source: ONS Family Spending report

The most widely available indicator of housing affordability is the ratio of lower quartile house prices to lower quartile earnings. Chart 13 shows the trend in this ratio for both London and England between 1997 and 2010. The drop in housing prices during 2009 improved affordability a small amount but not by very much, and by the end of 2010 the ratio had risen to 9.0 in London and 6.7 in England as a whole. Within London, affordability ratios range from 6.6 in Barking and Dagenham to 22.1 in Kensington and Chelsea²⁶.

“The drop in housing prices during 2009 improved affordability a small amount but by the end of 2010 the ratio had risen to 9.0 in London”

Chart 13: Ratio of Lower Quartile House Prices to Lower Quartile Earnings



Source: Communities and Local Government

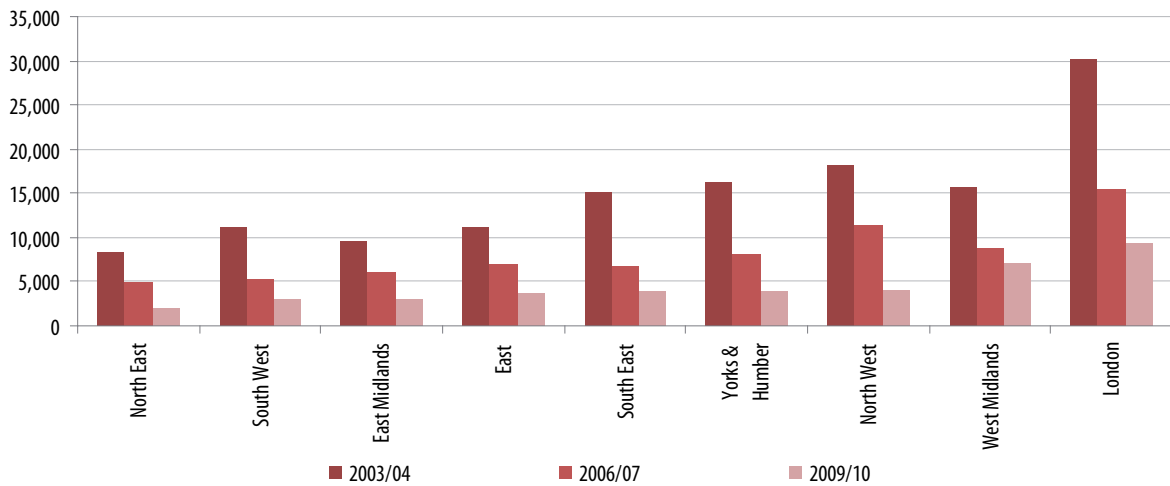
Housing Need

London had the largest number of households accepted by local authorities as statutorily homeless in 2009/10 with a total of 9,460. This figure is the lowest since these records began in 1991/92 and represents a fall of around two thirds from the peak in 2003/04 (Chart 14), largely a result of much more rigorous homelessness prevention work by the London boroughs. More recent quarterly figures show a small increase in homelessness acceptances in London and the rest of the country, probably driven by the recent recession²⁷.

The number of homeless households living in temporary accommodation in London has also fallen substantially in recent years, but at 36,020 at the end of 2010 is still three times as much as in the rest of England combined (Chart 15)²⁸.

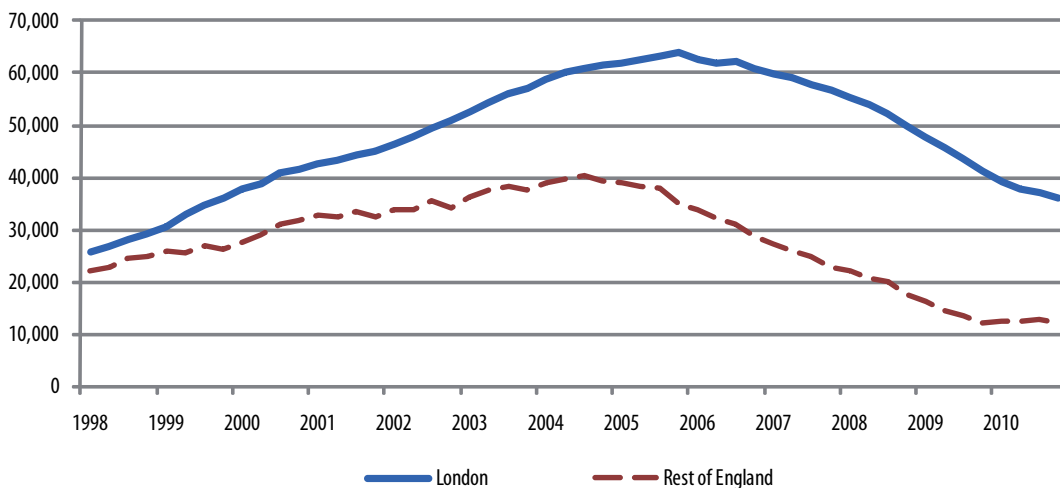
“The number of homeless acceptances is the lowest since these records began in 1991/92 and represents a fall of around two-thirds from the recent peak in 2003/04”

Chart 14: Households Accepted by Local Authorities as Owed a Main Homelessness Duty, by Region, 2003/04 - 2009/10



Source: Communities and Local Government

Chart 15: Homeless Households in Temporary Accommodation, 1998-2010

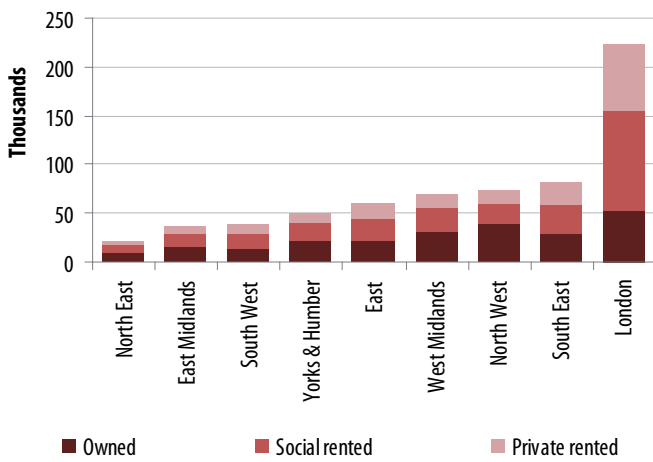


Source: Communities and Local Government

There are an estimated 224,000 households living in overcrowded accommodation in London²⁹ (Chart 16), far more than in any other region and an increase of around 65,000 in the last decade³⁰. In 2008/09, 7.2 per cent of households in London were overcrowded, compared with 2.3 per cent in the rest of England. Rates of overcrowding are highest in social rented housing (where 13.5 per cent of households are overcrowded), compared to 10.1 per cent in private rented housing and 3.2 per cent in owner occupied housing.

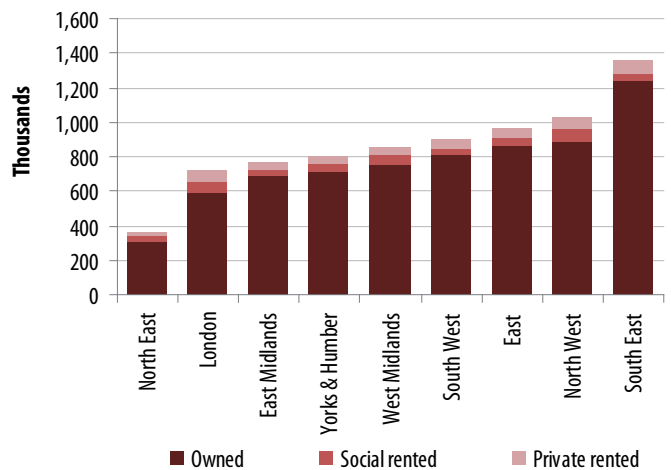
While London has the most overcrowded households of any region, it also has one of the lowest levels of under-occupation (defined as a household having two or more bedrooms more than it needs according to the government's 'bedroom standard'). There are estimated to be 720,000 households under-occupying in London, with owner occupiers comprising the vast majority (Chart 17).

Chart 16: Number of Overcrowded Households, by Region, 2008/09



Source: 2008-09 EHS-LFS combined dataset

Chart 17: Number of Underoccupying Households, by Region, 2008/09



Source: 2008-09 EHS-LFS combined dataset

“London has the most overcrowded households of any region, and it also has one of the lowest levels of under-occupation”

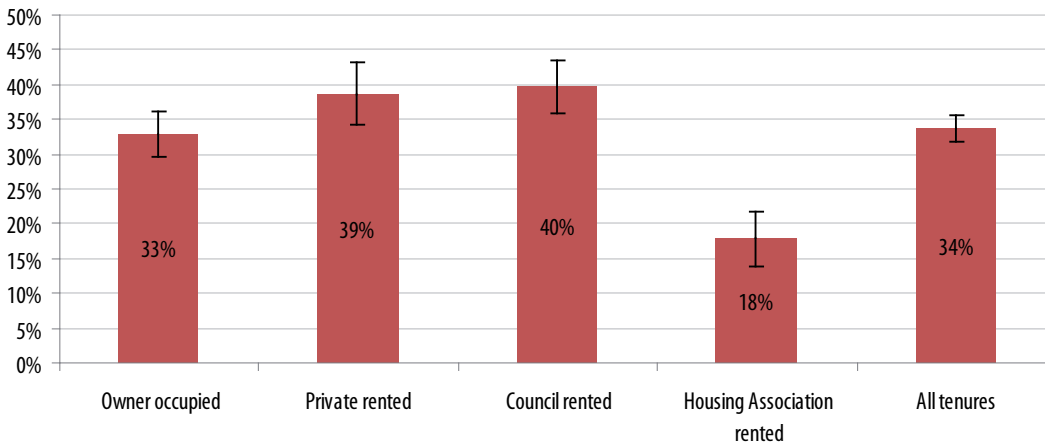
Empty Homes and Stock Condition

In October 2010 there were estimated to be 80,220 empty homes in London, according to new government statistics based on council tax data³¹. Despite the recent recession and drop in housing market activity, the number of empty homes in London is at a very low level compared to previous years³². Of the 80,220 empty homes in London, 34,671 have been empty for six months or more, down from 36,645 in 2009 and 42,600 in 2004.

Around one third of homes in London fall below the 'Decent Homes' standard, a level which is not significantly different from any other regions except the North East (where around a quarter of homes are non-decent) and the South East (where around 40 per cent fail to meet the standard). Within London, rates of non-decency are highest in private rented and council rented homes, and lowest (by far) in housing association homes³³ (Chart 18).

“The number of empty homes in London is at a very low level compared to previous years”

Chart 18: Non-decent Homes in London by Tenure, 2008/09



Note: Error bars show 95% Confidence Intervals.

Source: English Housing Survey

End Notes

- 1 Greater London Authority, 2010 Round of Demographic Projections
- 2 GLA, analysis of 2008-09 English Housing Survey data
- 3 Department for Communities and Local Government, English Housing Survey: Household report 2008-09, 2010
- 4 ONS, Annual Population Survey 2009 from GLA London Datastore
- 5 Greater London Authority, 2009 Round of Demographic Projections from Focus on London 2010: Population and Migration
- 6 GLA, The London Plan: Consultation draft replacement plan, 2009. Note that the final plan, including the housing provision targets, will be subject to the report of the London Plan Examination in Public panel and the Mayor's response to that report.
- 7 GLA analysis of Integrated Household Survey data
- 8 GLA analysis of Integrated Household Survey data
- 9 DCLG, English Housing Survey: Household report 2008-09, 2010
- 10 GLA, Focus on London 2010: Population and Migration
- 11 GLA, Intelligence Update 03-2011: Migration indicators
- 12 DCLG, Net supply of housing: 2009/10, England
- 13 GLA, London Plan Annual Monitoring Report 7
- 14 GLA, London Plan Annual Monitoring Report 7
- 15 DCLG, Live tables on land use change statistics
- 16 DCLG, Live tables on land use change statistics
- 17 GLA, London Plan Annual Monitoring Report 7. The government has recently announced the introduction of 'affordable rent', a new type of affordable housing with the same tenancy conditions as social rented housing but let at rents of up to 80 per cent of market rents.
- 18 DCLG, Affordable housing supply statistics, Live table 1000
- 19 DCLG, Housing live table 588, and Council of Mortgage Lenders, Mortgage lending statistics
- 20 DCLG, House price index, January 2011, tables A1 and A2
- 21 Neighbourhood Statistics, Changes of ownership by dwelling price, 2009. Note, these figures are not adjusted for size or other characteristics.
- 22 This data was gathered by GLA from the London Rents Map and is based on a sample covering the 12 months to March 2011.
- 23 These indicative estimates were derived using data on housing benefit caseloads, housing benefit and rents as of March 2010. DWP and GLA, calculated by GLA from data published in DWP, Impacts of Housing Benefit proposals: Changes to the Local Housing Allowance to be introduced in 2011-12, 2010
- 24 ONS Family Spending report using Living Costs and Food Survey data
- 25 'Net rent' is gross rent minus housing benefit, rebates and allowances received
- 26 DCLG, Housing live table 576
- 27 DCLG, Statutory Homelessness Q4 2010
- 28 DCLG, Housing live table 777
- 29 DCLG, English Housing Survey: Household report 2008-09, 2010
- 30 DCLG, Data provided to GLA
- 31 DCLG, Housing live table 615
- 32 The figure of 80,220 from council tax data is the lowest since the first year reported, 2004. According to the other main source of data on empty homes, the Housing Strategy Statistical Appendix, there were 81,750 empty homes in London in April 2010, the second lowest figure since records began in 1978, with only 2009 lower.
- 33 GLA, analysis of 2008-09 English Housing Survey data

Glossary and Notes

Affordable housing is designed to meet the needs of eligible households whose incomes are not sufficient to allow them to access decent and appropriate housing in their borough. It should include provision for the home to remain at an affordable price for future eligible households or, if these restrictions are lifted, for the subsidy to be recycled for alternative affordable housing provision. Until the recent introduction of the new affordable rent tenure (none of which has yet been completed at the time of writing), affordable housing comprised social rented and intermediate housing, defined below.

Social rented housing is housing provided by a landlord where access is on the basis of housing need, and rents are no higher than target rents set by the government for housing association and local authority rents.

Intermediate housing is housing at prices and rents above those of social rent, but below market price or rents, and which meet the access criteria (such as income) for affordable housing set out above. Intermediate housing can include shared equity products (e.g. HomeBuy), other low cost homes for sale and intermediate rent.

Affordable housing delivery includes the construction of new-build affordable housing but also the addition of existing units to the stock of affordable housing through schemes such as Open Market HomeBuy and the purchase and repair by housing associations of street properties for social renting.

Overcrowding

The bedroom standard

This indicator of occupation density was developed by the Government Social Survey in the 1960's for use in social surveys. It incorporates assumptions about the sharing of bedrooms that would now be widely considered to be at the margin of acceptability.

A standard number of bedrooms required is calculated for each household in accordance with its age/sex/marital status composition and the relationship of the members to one another. A separate bedroom is required for each married or cohabiting couple, for any other person aged 21 or over, for each pair of adolescents aged 10 - 20 of the same sex, and for each pair of children under 10. Any

unpaired person aged 10 - 20 is paired, if possible with a child under 10 of the same sex, or, if that is not possible, he or she is counted as requiring a separate bedroom, as is any unpaired child under 10.

This standard is then compared with the actual number of bedrooms (including bed-sitters) available for the sole use of the household. Bedrooms converted to other uses are not counted as available unless they have been denoted as bedrooms by the residents, bedrooms not actually in use are counted unless uninhabitable. If a household has fewer bedrooms than implied by the standard then it is deemed to be overcrowded. As even a bed-sitter will meet the bedroom standard for a single person household, or for a married/cohabiting couple, single person and couple households cannot be overcrowded according to the bedroom standard.

London Development Database

Designed to record the progress of planning permissions in the London area, Planning permissions in London (also known as the London Development Database or LDD) makes it possible for the public to find information on live and completed planning permissions anywhere in London.

For each permission, the database provides the date that the permission was granted, its status (not-started, started or completed), the name of the borough in which the site is located, the address of the site, a brief description of the permission and a link to the borough's website.

Additional information about planning applications and permissions (for example, schemes that are awaiting a decision or have been rejected) may be obtained by visiting the appropriate borough website or contacting the borough planning department.

Developed by the Greater London Authority to assist with monitoring the implementation of the Mayor's London Plan, the database records permissions meeting specific criteria only; it does not record all permissions granted within London. The GLA is not responsible for adding any information to the database: all information is input by staff in the London boroughs. Boroughs are expected to add permissions to the database within three months of granting permission.

Housing supply figures

Figures are taken from *Housing in London: The evidence base for the Mayor's Draft Housing Strategy*, GLA 2007 and *London Plan Annual Monitoring Report 4*, GLA 2008. These figures differ from CLG house-building statistics but are considered more reliable as they cover all developments in London to a high level of detail.

Households accepted as homeless: by reason

In England, households are accepted as homeless on the basis that they are found to be eligible for assistance, unintentionally homeless and falling within a priority need group, and consequently owed a main homelessness duty by a local authority under the homelessness provisions of the Housing Act 1996.

Annual Survey of Hours and Earnings (ASHE)

The Annual Survey of Hours and Earnings (ASHE) is conducted in April each year to obtain information about the levels, distribution and make-up of earnings and hours worked for employees.

This data set provides information about earnings of employees who are living in an area, who are on adult rates and whose pay for the survey pay-period was not affected by absence.

ASHE is based on a sample of employee jobs taken from HM Revenue & Customs PAYE records. Information on earnings and hours is obtained in confidence from employers. ASHE does not cover the self-employed nor does it cover employees not paid during the reference period.

Acknowledgements

The GLA would like to kindly thank the Department for Communities and Local Government and the Valuation Office Agency, whose advice and data have been invaluable to this report.

Websites, References and Further Reading

Office for National Statistics

<http://www.statistics.gov.uk/hub/index.html>

Department for Communities and Local Government

<http://www.communities.gov.uk/>

Homes and Communities Agency

<http://www.homesandcommunities.co.uk/>

Council of Mortgage Lenders Statistics

<http://www.cml.org.uk/cml/statistics>

Land Registry house prices

<http://www.landreg.gov.uk/house-prices>

Ministry of Justice repossession statistics

<http://www.justice.gov.uk/publications/statistics-and-data/civil-justice/mortgage-possession.htm>

English Housing Survey

<http://www.communities.gov.uk/ehs>

GLA Housing team

<http://www.london.gov.uk/priorities/housing>

The London Housing Strategy

<http://www.london.gov.uk/publication/london-housing-strategy>

The London Plan

<http://www.london.gov.uk/priorities/planning>

London Plan Annual Monitoring Reports

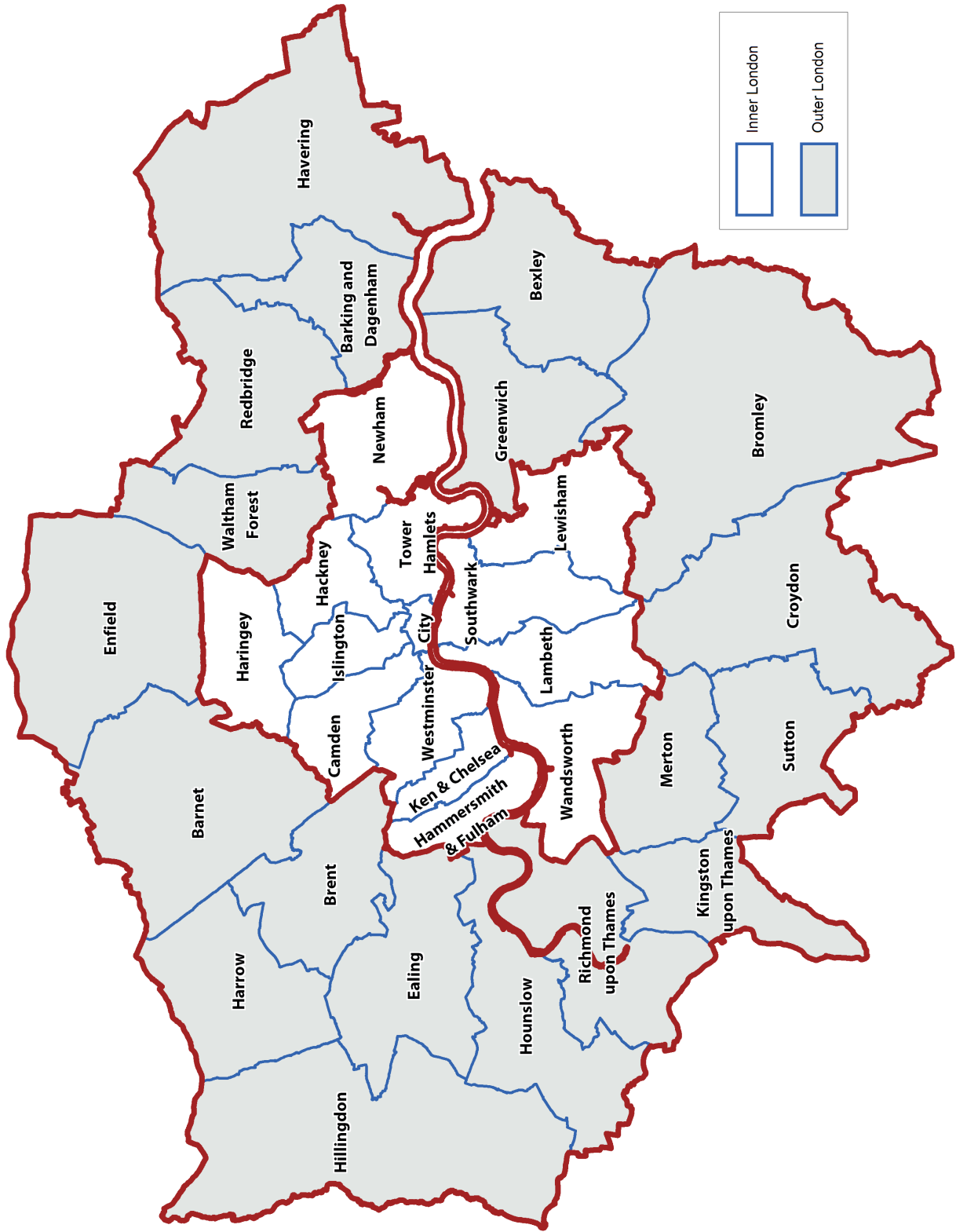
<http://www.london.gov.uk/priorities/planning/research-reports/annual-monitoring-reports>

London Development Database

<http://www.london.gov.uk/priorities/planning/research-reports/london-development-database>

London Rents Map

<http://www.london.gov.uk/rents/>



This map shows the ONS definition of inner / outer London. The replacement London Plan uses a different definition.