

# **Brent Inclusive Growth Strategy (IGS): Housing**

**2019-2040**

# Contents

Executive Summary .....	113
Introduction .....	116
Baseline Analysis .....	117
Housing Demand & Supply .....	117
Population .....	121
Tenure Types and Ownership .....	121
Open Market .....	124
Affordable Housing .....	129
Demand Management .....	133
Housing Benefit .....	133
Homelessness .....	135
Temporary Accommodation .....	135
Overcrowding .....	138
Rough Sleepers .....	139
Specialist Housing Provision .....	141
Partnership Working .....	142
Registered Providers .....	142
Private Developers – Volume homebuilders .....	142
Private Rented Sector .....	143
Trends .....	147
Trend 1: Change in demographic structure and household mix .....	147
Trend 2: Worsening Supply & Demand Imbalance .....	150
Trend 3: Increasing Unaffordability .....	153
Trend 4: The need for increased densification .....	158
Trend 5: Maximising land use through mixed use development .....	160
Trend 6: Increased use of Town Centres and High Streets for Housing delivery .....	163
Trend 7: Increase of the Private Rented Sector (PRS) .....	164
Responses .....	168
Response 1: Change in Demographic Structure and Household Mix .....	168
Response 2: Demand & Supply Imbalance .....	169
Response 3: Increasing Unaffordability .....	170
Response 4: Densification .....	172
Response 5: Town Centres, High Streets and Mixed Use Development .....	174
Response 6: Increase of the Private Rented Sector .....	175
References .....	178

## Executive Summary

Over the next 20 years delivering enough housing to accommodate a growing population will continue to be one of the most important and structural issues in Brent. As London's population continues to grow, to over 10.8 million between 2019 and 2040, housing delivery will have to accelerate beyond current levels in order to meet the increased demand. Brent's population will reach 400,000 by 2040, which will have extensive impacts in the borough including increased demand for good quality affordable housing. Brent Council will have to adapt to a new and changing housing scenario where lifestyles trends, affordability and tenure will redefine the housing market, both in the private and public sector.

To understand the future of housing in Brent the report starts with a baseline overview of current housing provision in the borough considering: tenure, open market, affordable housing, housing benefit, homelessness, temporary accommodation, overcrowding, rough sleepers, specialist housing need, partnership working and the private rented sector. This chapter will also look at key pieces of legislation and policy initiatives affecting decision makers in Brent. Key findings from this analysis include:

- Although Brent has continued to increase its dwelling stock over the last 10 years (period 2008 - 2018) by 8.23%, its current housing stock does not meet demand.
- With an area of 4,324 hectares, the population density in Brent at 78.8 persons per hectare (ha) is the highest in Outer London (mean average of 43.3 persons per ha) and the 14th highest in England and Wales.
- In 2018, there was a total of 118,710 dwellings in Brent, the 12<sup>th</sup> highest in the 33 London boroughs.
- The Draft London Plan (2017) sets a new target of 29,150 additional homes to be delivered in Brent over the period 2019/20 to 2028/29, an average of 2,915 per annum. This is almost double the 2015 target of 1,525 homes per annum.
- Whilst Brent has seen a 2.3% increase in average house prices in the year to February 2018, the overall picture shows a slowdown in the annual growth rate in London since mid-2016.
- Brent Council's managed housing stock consists of 11,509 homes as of March 2019, comprised of 7,764 council rented properties and 3,745 Leasehold properties
- A third of Council stock constitutes bedsit and 1-bed units that make up over half of all lettings, but under a third of demand. The demand for 3 and 4-bed units, however, is double the available lettings.
- In 2018, there were 55 Registered Providers (RP) operating in the borough, managing approximately 20,221 affordable homes to rent
- Since 1997 Registered Provider stock has increased by approximately 109%, a slightly faster rate than London (which increased by 100% during the same period).
- The number of housing benefit claimants in Brent reached its peak in 2012-13 at 38,099, as of March 2018 this number is 34,488, around a 9.5% reduction.
- Brent has the highest number of housing benefit claimants in all of the outer London Boroughs, and has the 2<sup>nd</sup> highest number of housing benefit claimants in social rented accommodation.
- As of 1<sup>st</sup> April 2019, 3,161 households are in Bands A-C on the Housing Register (those considered to be in housing need). In the period from April 2015 to April 2019 there has been an average 8.3% year on year reduction of households on the Housing Register.
- Brent has had one of the largest temporary accommodation portfolios in the country for many years. In 2019, Brent Council reports to have 2,191 households in Temporary Accommodation, a total reduction of around 50.8% since 2004.

- In 2017/18, 200 individuals were recorded rough sleeping in Brent, a 32% decrease on figures from 2016/17.
- Brent is currently developing and rolling out its New Accommodation for Independent Living (NAIL) project, which aims to identify develop and acquire alternative forms of care to residential care for all vulnerable adult groups.
- Owner occupation declined from 56% to 44% between 2001 and 2011, while private rent increased from 20% to 31% in the same period.
- As of Q3 2018, Brent had the 13<sup>th</sup> highest median private rent levels in London, and the second highest median private rent levels in outer London.

Consideration then turns to how housing provision in the borough can evolve in order to address the challenges and seize the opportunities presented by the following trends:

1. Change in demographic structure and household mix
2. Worsening supply and demand imbalance
3. Increasing unaffordability
4. The need for increased densification
5. Maximising land use through mixed use development
6. Increased use of Town Centres and High Streets for housing delivery
7. Increase of the private rented sector (PRS)

The implications of these trends include:

- Demographic changes will prompt the need for different housing typologies, increasing the demand for extra care, sheltered housing and leasehold schemes for the elderly but also increasing the demand for larger family homes.
- Higher housing targets set by the GLA and Brent indicate a need to accelerate housebuilding to an extent that outpaces historic housing delivery trends. Brent will require a large proportion of overall housing delivery to be affordable.
- Housing demand outweighing supply is having a knock on effect on affordability. There is a clear trend that housing costs are outstripping wages at high rates. This is effecting affordability of home ownership, private and social renting, and reducing mobility between tenures. Increased unaffordability has implications for levels of homelessness and poverty within the borough.
- Given London's scarce land supply and competing demands for land use, including demand for new homes to accommodate London's growing population, it is vital that higher density is achieved.
- Population growth in London demands not only increased housing delivery but also increased employment space and jobs. Mixed use development, which combines residential, infrastructure and commercial uses, and closer co-location of these uses, will need to be utilised across London to make the most efficient use of land.
- Due to their centrality and connectivity to the rest of the borough, demand for High Street and Town Centre housing will continue to grow, and in the context of declining retail in some areas represents an opportunity to boost both housing supply and footfall on the high street.
- London's Private Rented Sector (PRS) has doubled in just over a decade and continues to rise, with private renters projected at 40% of London's households by 2025
- . New models of PRS delivery will grow but reliance on PRS in the housing sector may have future affordability implications for some renters.

The chapter concludes with some potential responses to these trends. Suggestions are made as to how to accommodate the shift in demographics and housing trends, to maintain and

improve quality of life and adequate housing for residents of Brent into the future. These include:

- Providing specialist accommodation for the most vulnerable, but also options to accommodate multi-generational households and housing for working professionals.
- Diversifying the housebuilding industry in Brent to deliver the necessary step change in housing supply by increasing the number of actors on the stage, greater partnership working through joint ventures with small house builders and Housing Associations, but also through the Council itself.
- Ensuring a mix of tenures in housing delivery to combat unaffordability and to encourage mobility between tenures, as well as targeted approaches to combat the implications of unaffordability, including increased awareness of London Housing Allowance for PRS landlords and support for vulnerable adults at risk of homelessness.
- Looking to more innovative options for housing delivery, through increased densification in the 'suburbs', focusing on the utility of transport links and potential densification through above or around station development; and encouraging landowners to consider redeveloping sites that are currently used inefficiently – these include surface car parks and single-storey low density retail centres and stores – within Town Centres and High Streets.
- Finally, working more closely with private landlords to drive up standards in the PRS and explore options to improve affordability through Discount Market Rent products and initiatives such as London Living Rent.

## Introduction

Over the next 20 years delivering enough housing to accommodate a growing population will continue to be one of the most important structural issues in Brent. As London's population continues to grow, to over 10.8 million between 2019 and 2040, housing delivery will have to accelerate beyond current levels in order to meet the increased demand. Brent's population will reach 400,000 in 2040, which will have extensive impacts in the borough including increased demand for good quality affordable housing. Brent Council will have to adapt to a new and changing housing scenario where lifestyles trends, affordability and tenure will redefine the housing market, both in the private and public sector.

This report outlines the role of housing in contributing to Inclusive Growth in Brent from 2019-2040. It considers how housing provision in the borough will need to evolve in order to address both the challenges and opportunities presented by the following trends:

1. Change in demographic structure and household mix
2. Worsening supply and demand imbalance
3. Increasing unaffordability
4. The need for increased densification
5. Maximising land use through mixed use development
6. Increased use of Town Centres and High Streets for housing delivery
7. Increase of the Private Rented Sector (PRS)

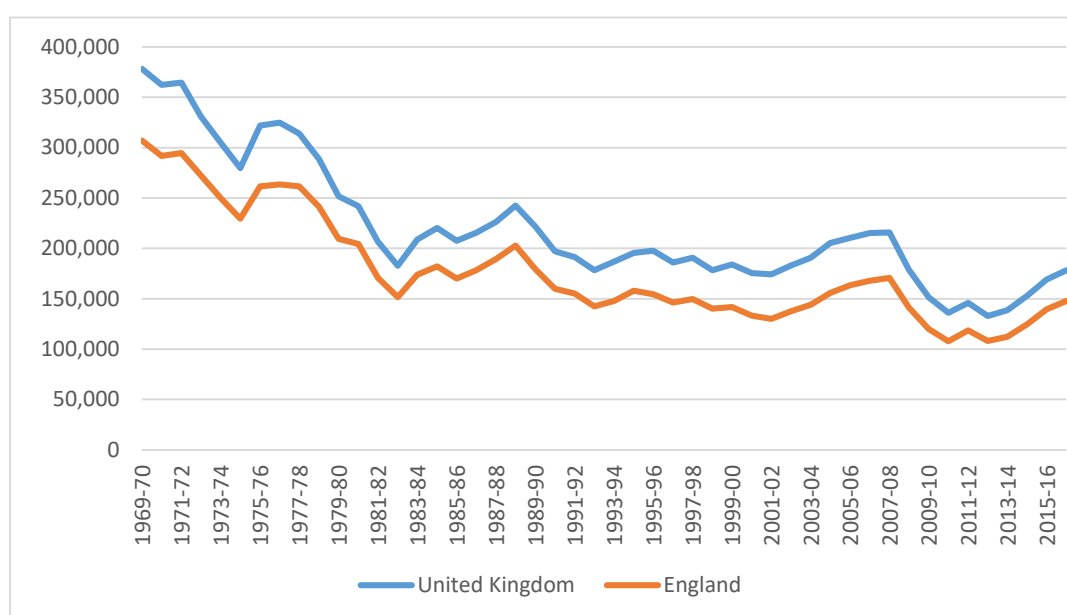
The report is organised into Baseline, Trends and Responses. Firstly, the **Baseline** section presents the context which defines the current status of housing provision in Brent. By examining both London and Brent, this section looks at changes in tenure types, prices and affordability; as well as, changes and policy responses in relation to housing benefit, homelessness, temporary accommodation and specialist housing provision; and finally, partnership working across the private and social rented sector and with the housebuilding industry. Secondly, the **Trends** section identifies and analyses key trends and the anticipated challenges and opportunities these will have for the housing sector. Thirdly, the **Responses** section presents potential strategies and policy choices that can address the challenges and create opportunity for Brent and its residents to prosper in the coming years.

## Baseline Analysis

### Housing Demand & Supply

House building in the UK has been on a long term downward trend since 1970 (Figure 81). Housing supply has continued to fail to meet demand despite increases in prices showing the housing markets unresponsiveness<sup>158</sup>. Between 1969 and 1979, permanent dwellings completed decreased by 33%, from 1979 to 1989 there was a 12% decrease, from 1989 to 1999 there was a 17% decrease, and from 1999 to 2009 there was an 18% decrease. Despite an 18% increase in permanent dwellings completed from 2009 to 2017, supply has still not met demand, and for this reason the National Planning Policy Framework has specified the need 'to boost significantly the supply of housing'.

**Figure 81: Permanent dwellings completed, DCLG 1969 – 2017**

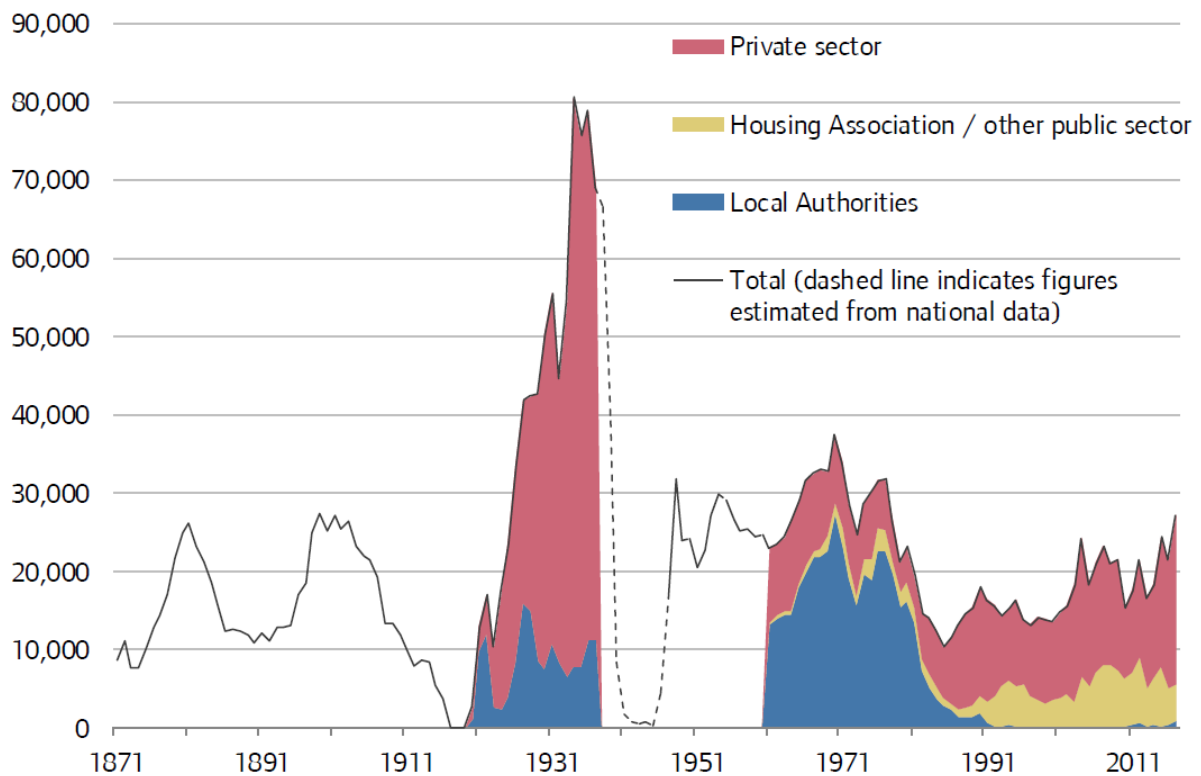


In London, the imbalance between supply and demand is exacerbated by faster population growth compared to the rest of the UK, as well as scarcity of developable land<sup>159</sup> among other factors. As such for many decades the number of new homes built in London is far less than the required need (Figure 82). The majority of homes in London are now built by private developers, moving away from the dominance of Local Authorities in the 1970s, with a proportion delivered by Housing Associations and other public sector bodies.

<sup>158</sup> Barker, K. (2004) Review of Housing Supply, Delivering Stability: Securing our Future Housing Needs, London: HMSO

<sup>159</sup> Ibid

**Figure 82: Estimated number of new build homes completed in London by tenure, 1871 – 2017**



Source: GLA, *Housing in London: 2018*

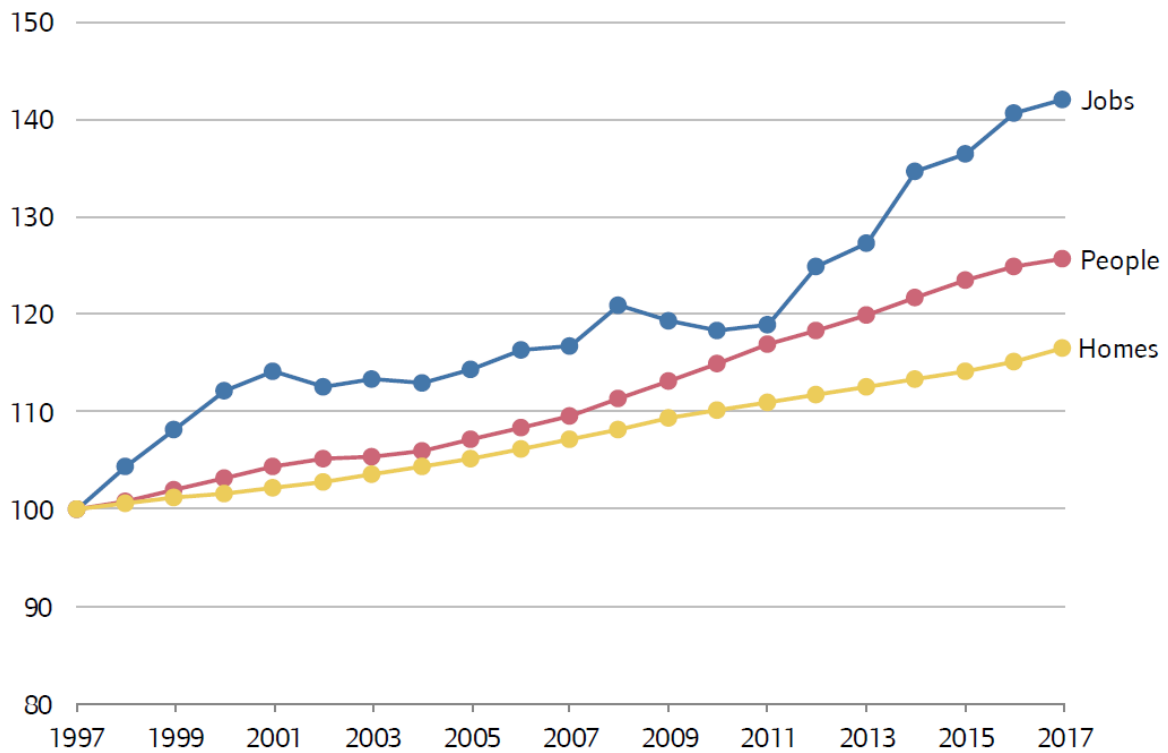
The reliance on this private-led model of delivery has economic constraints. Due to the limited capacity within the private housebuilding industry, with a small number of volumetric house builders dominating the marketplace, and high costs of developing large sites, developers seek to recover their investment by increasing density, reducing the levels of affordable housing and building more slowly to ensure that local markets are not saturated and house prices do not fall<sup>160</sup>. As a result, house prices have been consistently driven up, such that currently around 80% of new build homes are affordable to only 8% of London households<sup>161</sup>. At the same time, London continues to be an attractive place to live and work, meaning the increases in jobs and people have outpaced the number of homes available (Figure 83).

<sup>160</sup> Communities and Local Government Committee (2017) *Capacity in the homebuilding industry: Tenth report of Session 2016-17*, London: House of Commons

<sup>161</sup> Greater London Authority (2017) *London Housing Strategy: Draft for Public Consultation*, London: Greater London Authority



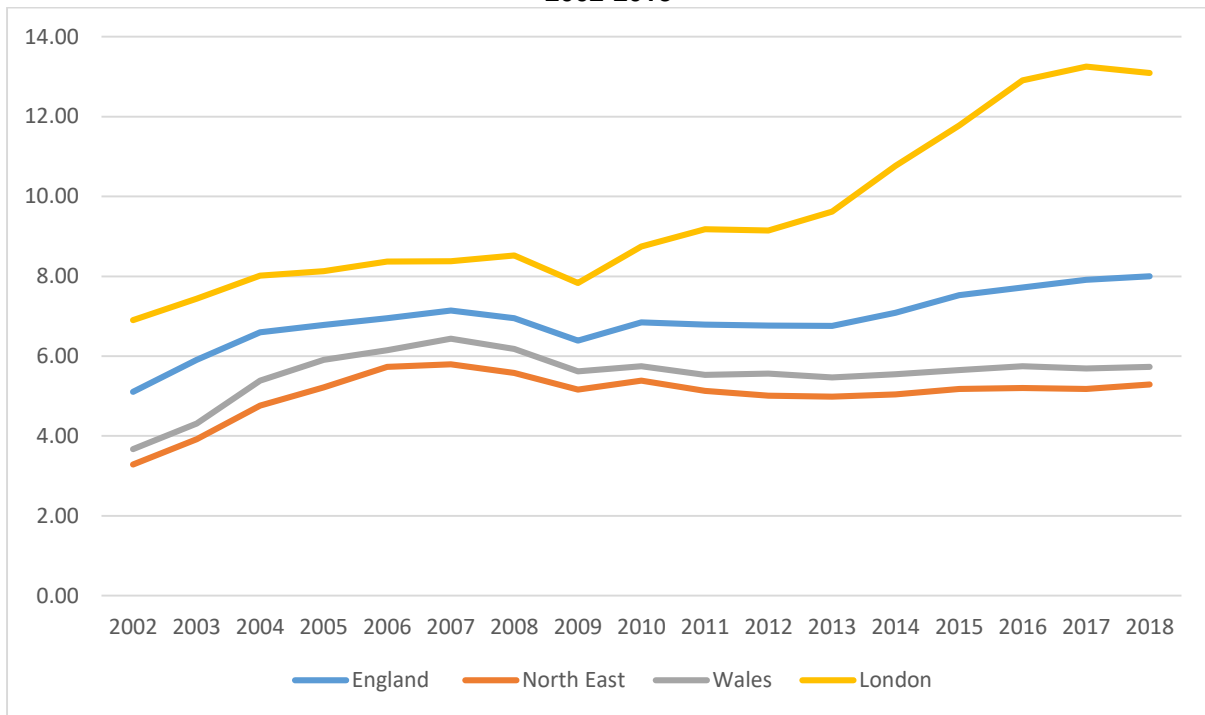
**Figure 83: Indexed trend in number of jobs, people and homes in London, 1997 - 2017 (1997 = 100)**



Source: GLA, *Housing in London: 2018*

London has become more unaffordable than the rest of the UK, with the ratio of median house price to median gross annual residence-based earnings being far higher than the North East – the most affordable place in England and Wales (Figure 84) However, London did see a decline in the ratio between median house price and median residence based earning in 2018, compared to 2017.

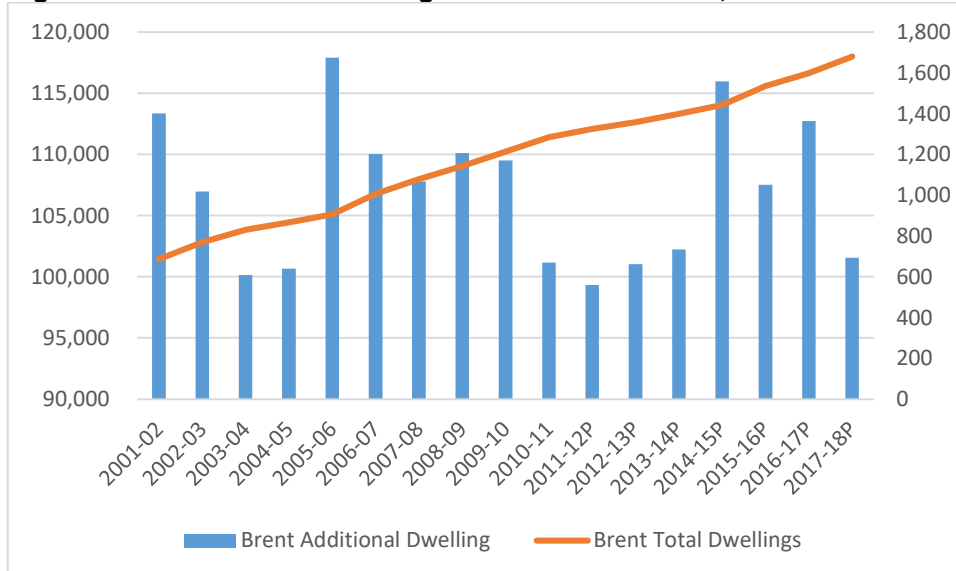
**Figure 84: Median house price to median residence based gross annual earnings ratio 2002-2018**



Source: Office for National Statistics: March 2019

Although Brent has continued to increase its dwelling stock over the last 10 years (period 2008 - 2018) by 8.23%, its current housing stock does not meet its demand (Figure 85). Moreover, Brent Council has been experiencing important changes in housing demand and supply since the 2001 Census, mainly in the tenure types and household sizes due its changing demographic.

**Figure 85: Net additional dwellings total stock estimates, DCLG 2001 – 2018**



Source: Total dwellings and net additions to stock per year, MHCLG: March 2019

## Population

With an area of 4,324 hectares, the population density in Brent at 78.8 persons per hectare (ha) is the highest in Outer London (mean average of 43.3 persons per ha) and the 14th highest in England and Wales. Brent's population has seen a substantial increase from 311,215 to 332,697<sup>162</sup> in the 2011-2017 period. In 2018, there was a total of 118,710 dwellings in Brent, the 12<sup>th</sup> highest in the 33 London boroughs<sup>163</sup>. Brent's Local Plan (2010) projects development of over 9,000 homes between 2017 and 2026 but is currently being updated to be in line with the draft London Plan (2017). The draft London Plan (2017) set a new target of 29,150 additional homes to be delivered in Brent over the period 2019/20 to 2028/29, an average of 2,915 per annum. This is almost double the 2015 target of 1,525 homes per annum.

Since 2011, Brent's population has kept a relatively young age structure. In 2018, 32% of Brent's population were aged 0-24 years, slightly higher than the London average of 31%, while 12% of Brent's population were aged 65-80 years. Brent's average household size at 2.8 persons per household is the third highest in London, which affects the nature of the housing demand<sup>164</sup>.

In 2018, 2.8% of Brent's population were older people aged 81+ years, compared to 3% of London's population. This age group is likely to experience complex care needs. The population in older age groups (aged 65 years or above) is projected to increase by a third of total population growth (around 22,000 individuals)<sup>165</sup>. Having both a young population and an increasing number of people aged 65 years and over creates challenging and disparate housing requirements in Brent – to supply both larger family dwellings and specialist care facilities.

## Tenure Types and Ownership

Since 1990, housing tenure has shifted towards the private rented sector and away from owner occupancy, both outright or with a mortgage. The share of households that own their homes outright has been relatively flat over the last two decades and stood at 22% in 2017, while the share that live in social housing has fallen slowly over the same period, reducing to 21% in 2017 – only the second time since 1981 that social tenants were the smallest tenure group. Changes since 2011 have been less dramatic, although the shares of mortgagors and private renters converged at 28% in 2016, there was a greater number of mortgages in 2017 (Figure 86).

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<sup>162</sup> Brent Council (2013) *Brent 2011 Census Profile*, London: Brent Council

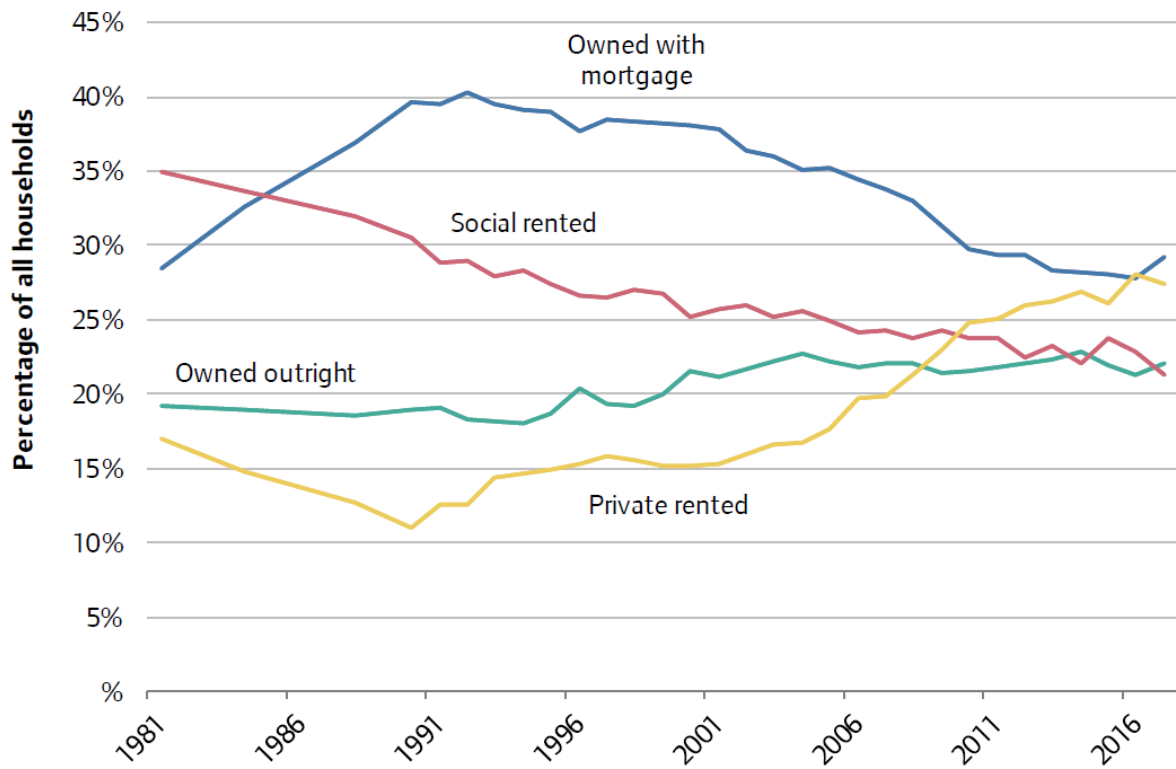
<sup>163</sup> Ministry of Housing, Communities and Local Government (2017) *Number of dwellings by tenure and district, England: Table 100*, London: Ministry of Housing, Communities and Local Government. Available at: <https://www.gov.uk/government/statistical-data-sets/live-tables-on-dwelling-stock-including-vacants>

<sup>164</sup> Office of National Statistics (2011) Census

<https://www.ons.gov.uk/peoplepopulationandcommunity/birthsdeathsandmarriages/families/articles/householdsandhouseholdcompositioninenglandandwales/2014-05-29#household-size-comparisons-within-the-united-kingdom>

<sup>165</sup> GLA Population Projections - Custom Age Tables: Long trend 2017

Figure 86: Annual trend in household tenure, London 1821 – 2017



Source: GLA, *Housing in London: 2018*

Different affordable housing rented tenure types can be identified in Brent, both in the public and private sector. We can find tenants under:

- **Social Rent:** by Traditional form of affordable housing owned and managed by Local Authorities and Registered Housing Providers. Low “formula” or “target” rents based on house prices and earnings, kept in line with the national rent regime, and made available on 2-5 year fixed term tenancies alongside lifetime tenancies at around 20%-50% of market rents.
- **Affordable Rent:** Introduced in 2010 under a government grant programme and subsequently defined in the National Planning Policy Framework in 2012. Owned and managed by Local Authorities and Registered Housing Providers, and designed for households in need of social rent housing, but with higher rents at up to 80% of market levels (inclusive of service charge), although in practice the average rent charged is around 65% of market rent levels. Generally made available on 2-5 year fixed term tenancies.
- **London Affordable Rent:** New product, introduced by the Mayor of London under the most recent grant programme. Lower rents more in line with social rents, but made available on fixed term tenancies.
- **London Living Rent:** Another new product from the Mayor of London. Despite the name, this is a rent-to-buy product. Rents are pegged at a proportion of local earnings to enable households to save. After 10 years the tenant is expected to either buy the home they are in outright or under shared ownership arrangements, or move out and buy somewhere else.
- **Discounted Market Rent:** Mainly delivered in larger Build-to-Rent (BTR) schemes, held in the private sector and made available under Assured Shorthold Tenancies (ASTs). Rents are set below market levels and inclusive of service charge. Tends to be delivered as an intermediate middle income product, rather than to meet local authority statutory housing duties.

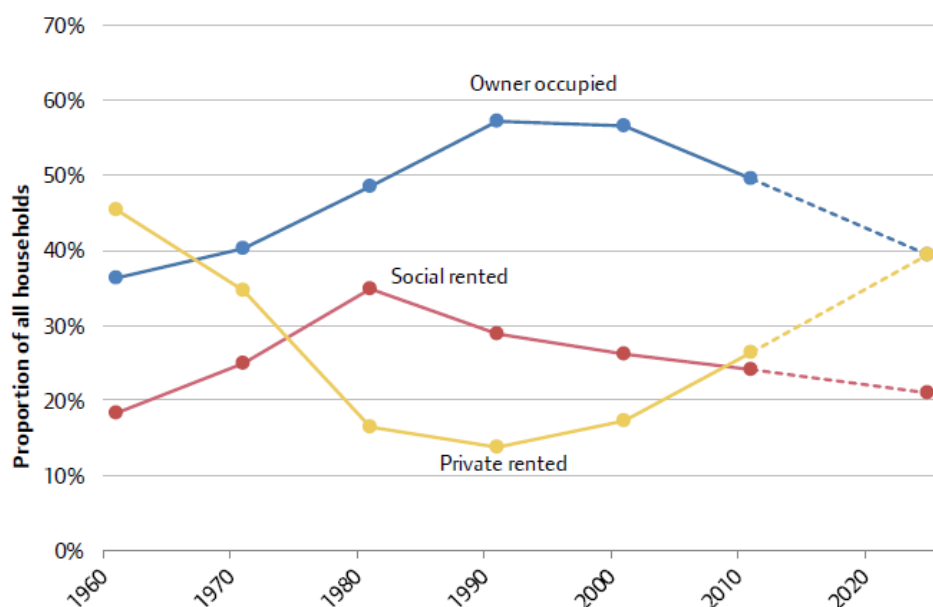
Recently there has been an increase of low cost home ownership options aside from conventional homeownership these include:

- **Shared Ownership:** The buyer purchases a share in a home, usually between 25%-75%, and pays rent on the remaining share retained by the landlord (usually a housing association but could also be a council or private developer). There is usually an option to buy further shares up to 100% outright ownership, which is known as “stair-casing out”. The purchaser is responsible for repairs and maintenance to the property.
- **Shared / Fixed Equity:** This is more unusual and mainly offered by housing associations and councils, for example to existing leaseholders on estate regeneration schemes. The buyer purchases a share as with shared ownership but does not pay rent on the remainder. The landlord will be repaid when the property is sold and share in any uplift in value.
- **Starter Homes:** Stalled government First Time Buyer (FTB) scheme drawn up in 2015. Buyer purchases the home at a discount to the full open market value, typically 20% discount, with the additional equity gifted to the buyer on condition the property is not rented out or resold for the first 5 years.
- **Discounted Market Sale:** Tend to be delivered in private developments. Buyer purchases the home at a discount to the full open market value, typically 20% discount, with the additional equity held by the local authority.

## Open Market

The Mayor of London's Housing in London (2017) report suggests that by 2025 private renting will be at the same level as owner occupation (Figure 87). The continued decline in home ownership in London (and across the UK) stems from changes in lifestyles, with many millennials now choosing to rent, but has its main root in the increasingly unaffordability of housing.

**Figure 87: Decadal trend in household tenures, London 1961-2011, with PwC projection to 2025**

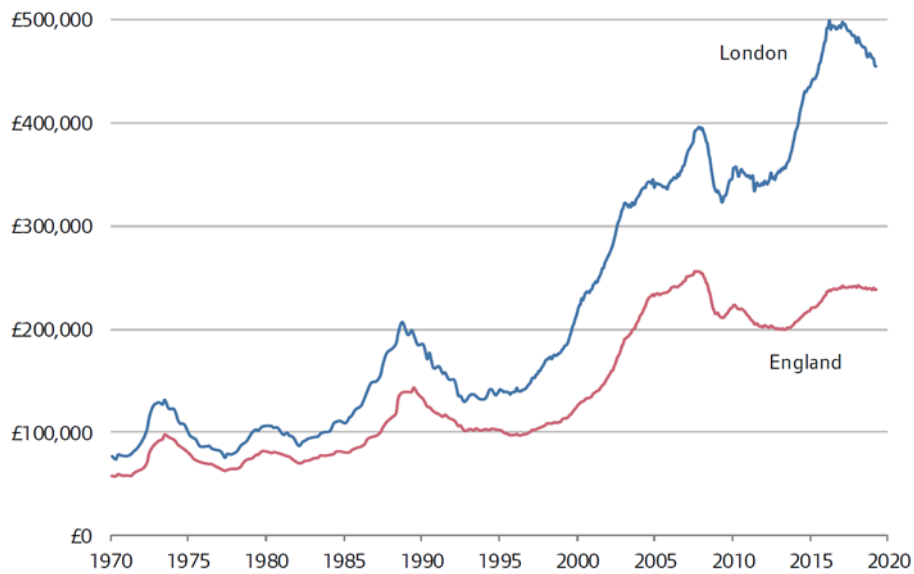


Source: GLA, *Housing in London: 2017*

Average house prices in London have grown more than six times from their 1970 level, after adjusting for inflation<sup>166</sup>. The increase has been substantial since the late 1990s, particularly in London, but also evident in the rest of England. House prices have increased at almost double the rate of average weekly earnings over the same period, without adjusting for inflation, resulting in increasing unaffordability (Figure 88 & 89).

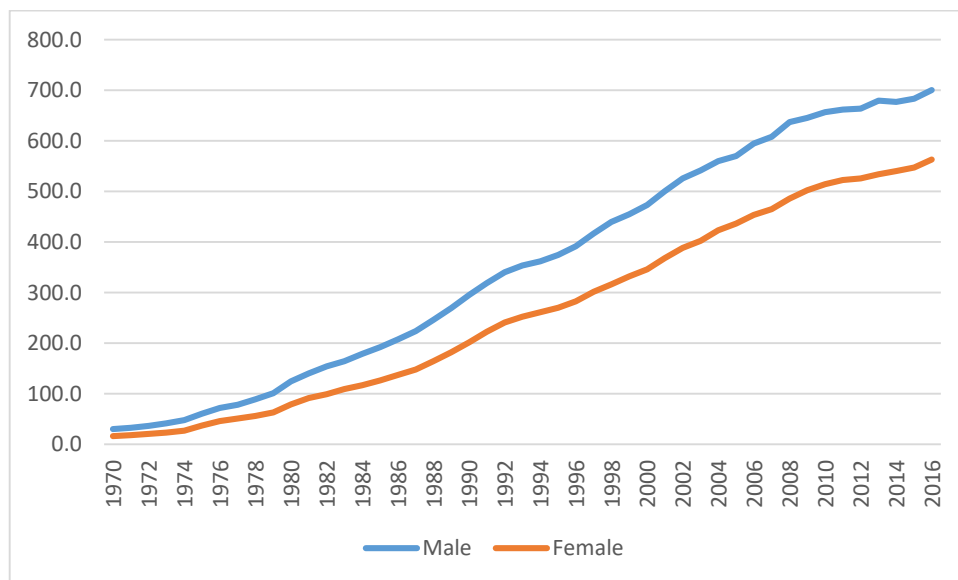
<sup>166</sup> Greater London Authority (2019) *HOUSING IN LONDON: 2018 The evidence base for the Mayor's Housing Strategy*, London: Greater London Authority.

**Figure 88: Average House Price, All Dwellings 1970 – 2019**



Source: *Housing in London 201*

**Figure 89: Average Gross Weekly Earnings, 1970 – 2016**



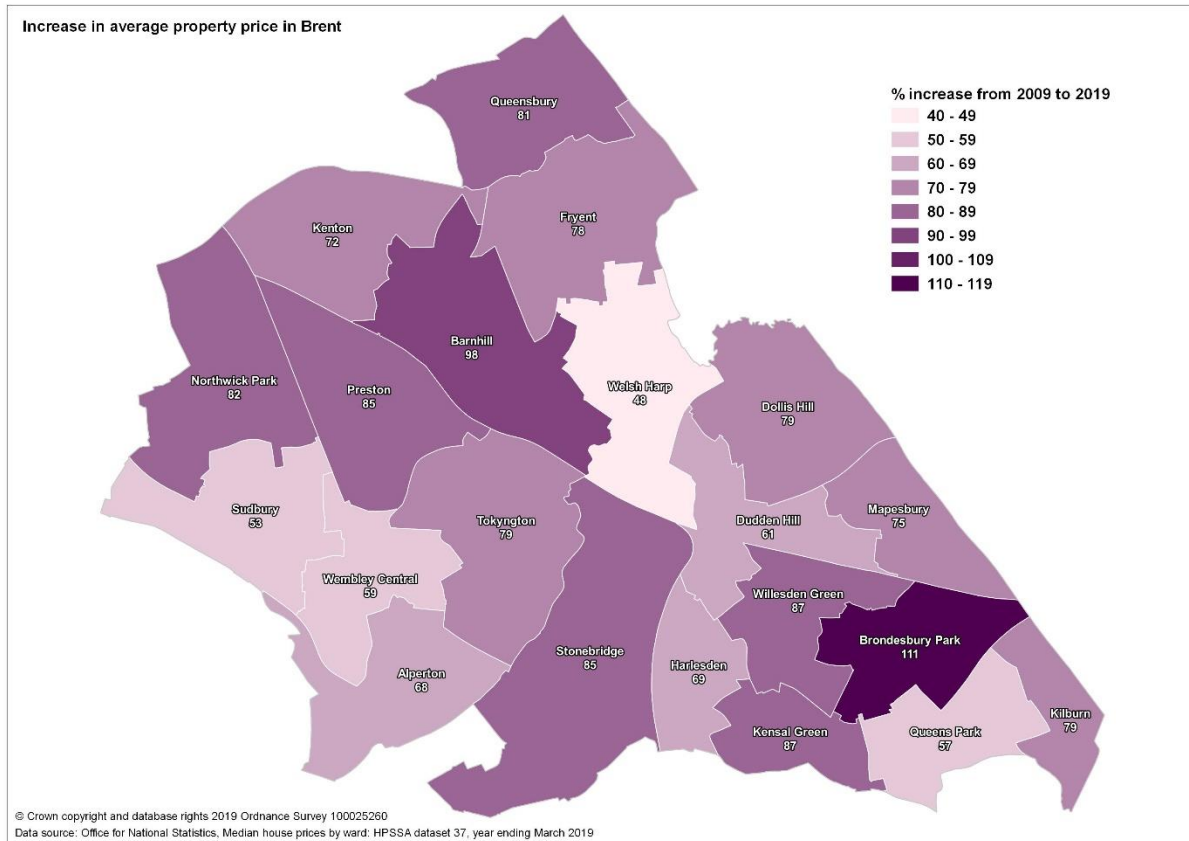
Source: Office for National Statistics, *New Earnings Survey (NES) time series of Gross Weekly earnings from 1938 to 2017: 2017*

The ONS, *Housing Summary Measures (2016)* shows the median house price in London increased by 38% from £300,000 to £415,125 between 2011 and 2015. Over the same period, median gross annual salary increased by only 17% from £21,271 to £24,927.

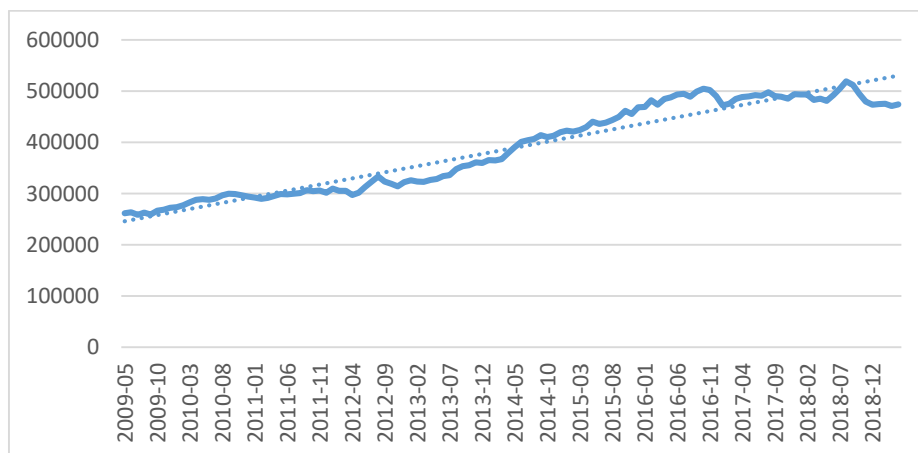
The Land Registry House Price Index (HPI) shows the average property price in Brent increased by 78% from 2009 to 2019, from £261,000 to £464,000 (Figure 90). Over the same period, the ratio of median house price to median residence based earnings has increased by just under 65%, from 9.89 to 16.26<sup>167</sup>. Whilst house prices have always outpaced earnings, in

<sup>167</sup> Office for National Statistics (2017) *New Earnings Survey (NES) time series of Gross Weekly earnings from 1938 to 2017*, London: Office for National Statistics. Available at: <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/adhocs/006301newearningsurveynewestimatesofgrossweeklyearningsfrom1938to2016>

recent years there has been a stark increase (Figure 91). There is a disparity in house price growth between wards within Brent. Between 2009 and 2019, Brondesbury Park saw the highest average property price increase by 111% compared to Welsh Harp, with the lowest average property price increase, by 48% - a 63% difference<sup>168</sup>.



**Figure 90: Average Price Paid for All House Types Brent, May 2009 – May 2019**

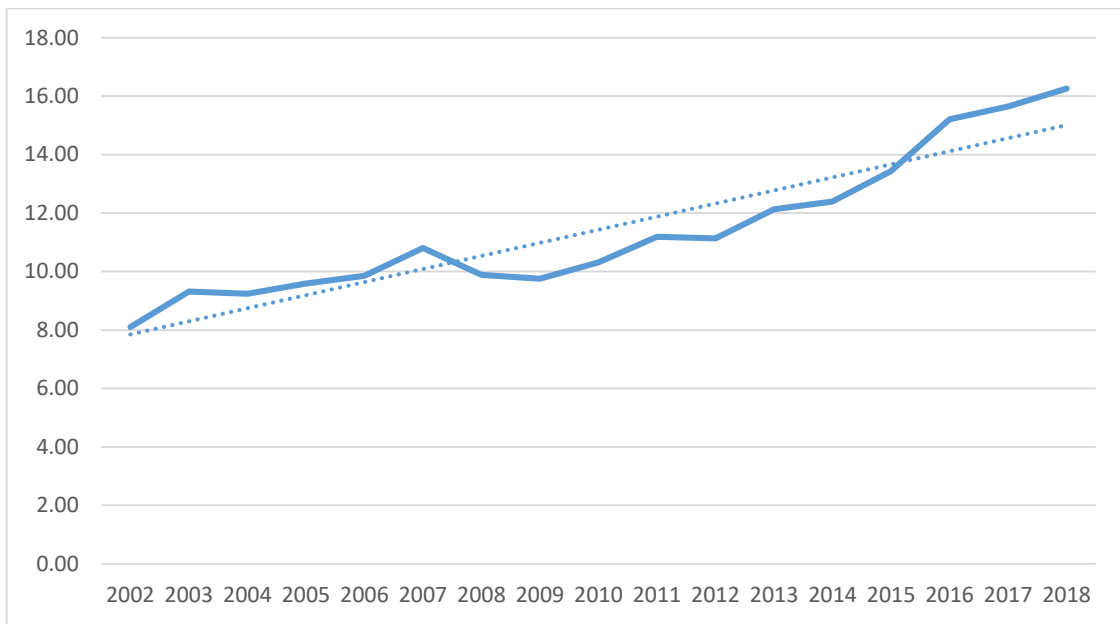


Source: Land Registry House Price Index 2009 - 2019: May 2019

<sup>168</sup> ONS (2019) *House Price Statistics for Small Areas Table 1a*, London: Office for National Statistics Available at: <https://www.ons.gov.uk/peoplepopulationandcommunity/housing/datasets/medianpricepaidbywardhpsadatset37>



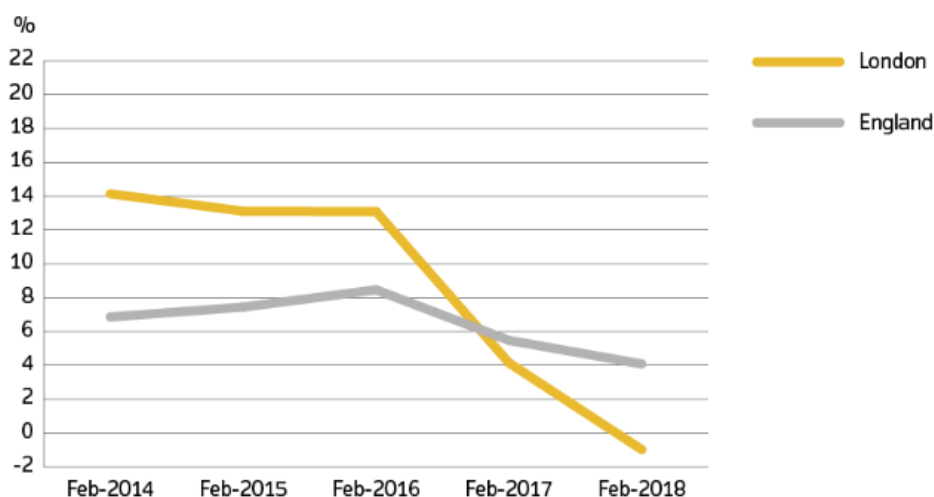
**Figure 91: Median house price to median gross annual earnings ratio 2002 2018**



Source: Office for National Statistics, 2002 to 2018: March 2019

Post the UK referendum to leave the EU and Stamp Duty Land Tax (SDLT) changes introduced in 2016, there has been some stagnation in the London property market. In London, average house prices decreased by 1.0% in the year to February 2018, the lowest annual growth seen since September 2009<sup>169</sup>. Whilst Brent has seen a 2.3% increase in average house prices in the year to February 2018, the overall picture shows a slowdown in the annual growth rate in London since mid-2016 (Figure 92). Over a longer period, prices in the prime London market have fallen from their 2014 peak by an average of 6.1%. The prime central London market has been hit harder, with a decline in price of 13.2%<sup>170</sup>.

**Figure 92: Annual price change for England and London over the past 5 years**



Source: HM Land Registry, UK House Price Index England: February 2018

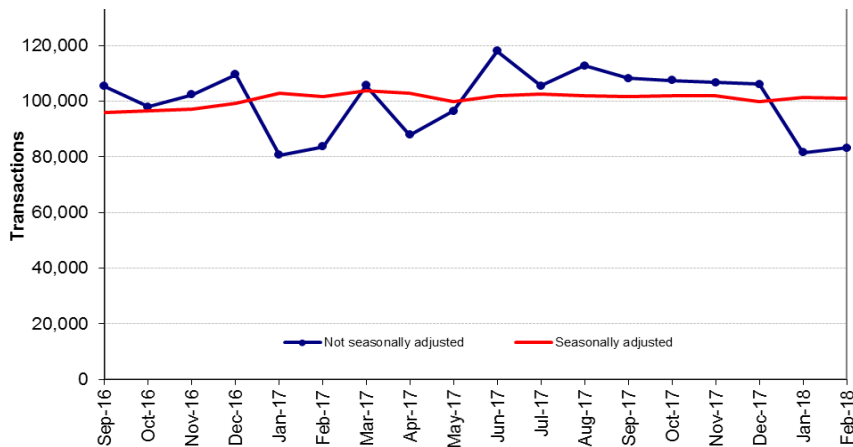
The stagnation in the property market is also reflected in the number of transactions completed in recent years. March 2016 saw the highest number of property sales, preceding the introduction of higher SDLT rates on additional properties in April 2016. HM Revenue and Customs reported the number of residential property transactions decreased by 1% in the year to February 2018 (Figure 93). Moreover, the Royal Institute of Chartered Surveyors (RICS) have reported that there has been a continued decrease in sales as a percentage of surveyors' stock within London<sup>171</sup>. All contributing to a weak and uncertain outlook for the property market in London.

<sup>169</sup>HM Land Registry (2018) *UK House Price Index England: February 2018*, London: HM Land Registry Available at: <https://www.gov.uk/government/publications/uk-house-price-index-england-february-2018/uk-house-price-index-england-february-2018>

<sup>170</sup> Savills PLC (2017) *Spotlight: Prime London & Country, 'Mind the gap'*, London: Savills PLC

<sup>171</sup> London Datastore (2018) *London Housing Market Report*, London: London Datastore. Available at: <https://data.london.gov.uk/housingmarket/>

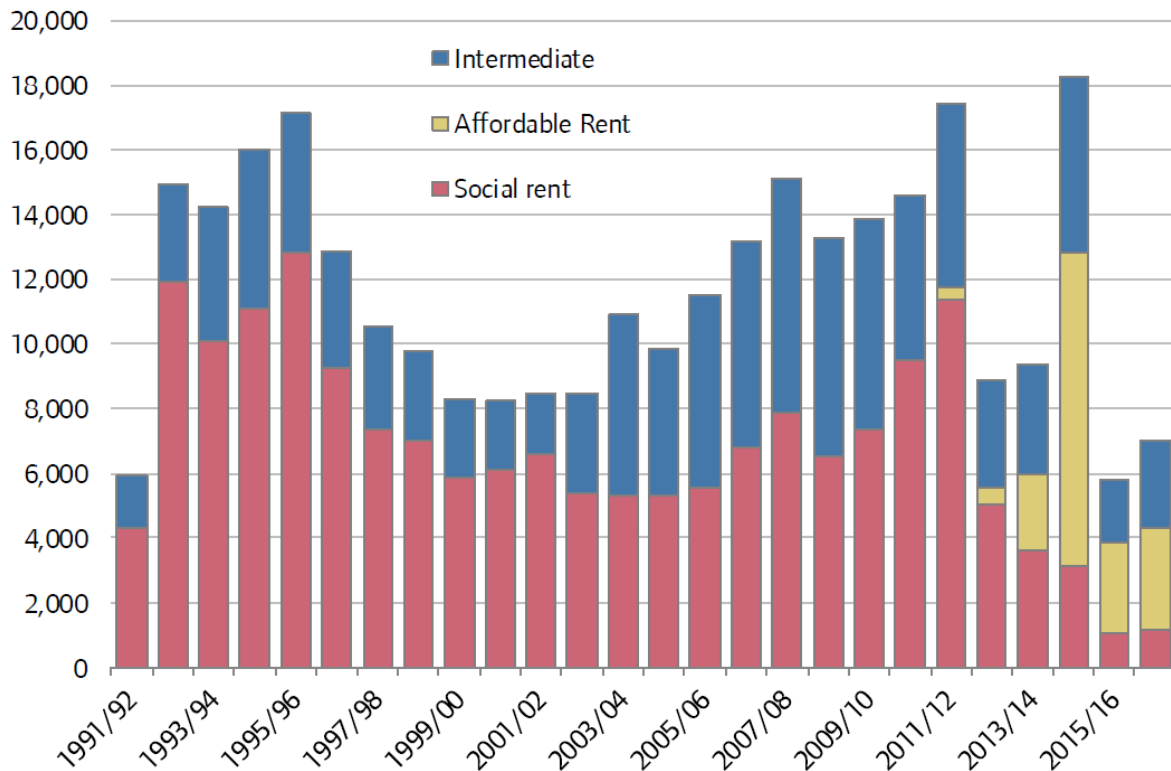
**Figure 93: Total UK Residential Property Transactions, Sep 2016 – Feb 2018**



Source: HM Revenue and Customs, UK Property Transactions Count: March 2018

## Affordable Housing

**Figure 94: Affordable housing completions in London, 1991/92 to 2016/17**



Source: GLA, Housing in London: 2018

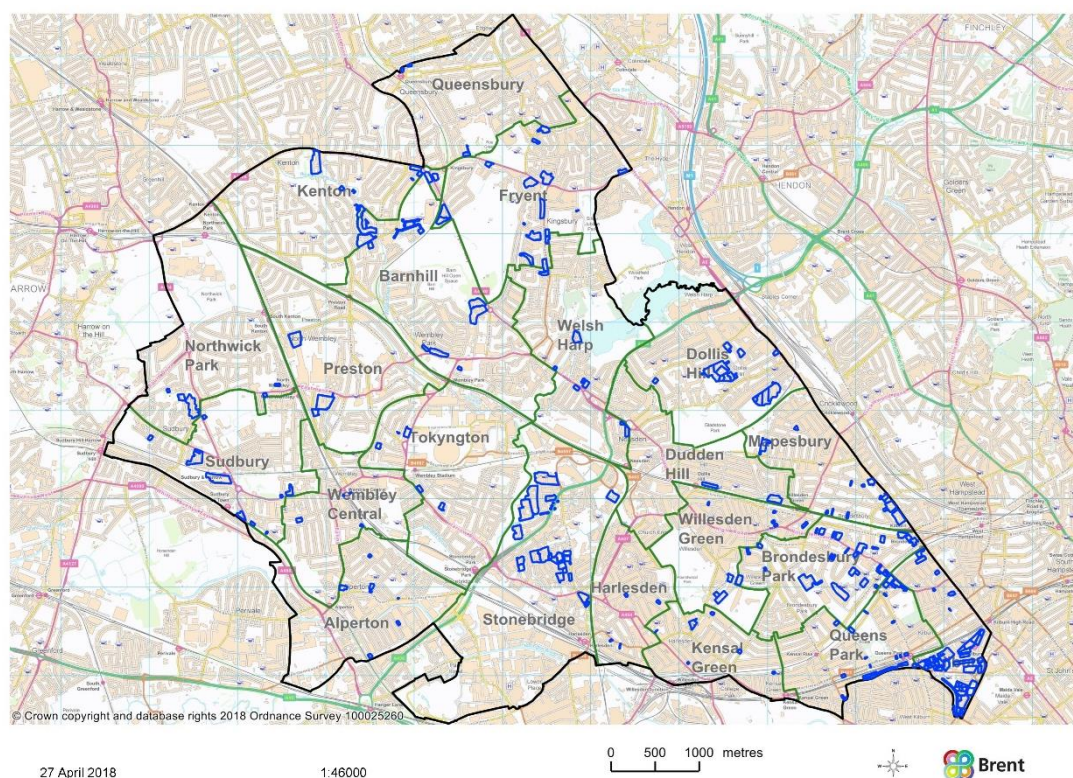
As housing prices continue to increase across London, access to housing and home ownership has become limited to many of its residents. For this reason, there is continued pressure on government and Local Authorities to provide accessible and affordable housing.

In 2016/17 there was a 20% increase in affordable homes completed compared to 2015/16 (a 25 year low in affordable housing delivery) (Figure 94)<sup>172</sup>.

## Brent Council Housing Stock

Brent Council's managed housing stock consists of 11,509 homes as of March 2019, comprised of 7,764 council rented properties and 3,745 Leasehold properties. Most of the housing stock is located in the south-east region of the borough and is comprised of flats on small and medium-sized estates (Figure 95).

**Figure 95: Housing Estates in Brent**



Source: GIS, Brent Council: 2018

Brent Council acts as a landlord under tenancy and leasehold agreements, its main responsibility is to provide housing and management services. The Council's relationship with its tenants and leaseholders is therefore a different one from that with other borough residents, as it is primarily a contractual one under which these households pay rent or service charges in exchange for specific services. From April 2002 until October 2017, Brent Council delegated these responsibilities to Brent Housing Partnership (BHP). A review of the Council Housing Management options came to the decision to bring the management of council properties back in house.

Average occupancy for tenanted and leasehold properties is 3.3 and 4.8 persons respectively, with the latter in part reflecting the extent of private letting of leasehold properties, giving a total of around 43,000 residents or over 1 in 8 of Brent's population. Around a third of tenants

<sup>172</sup> Housing in London 2018

are over 60 years old. 4% of tenants have a disability and 8% have a vulnerability. There is a marked difference between the balance of lettings available and the profile of demand by bed-size. A third of Council stock constitutes bedsit and 1-bed units and make up over half of all lettings, but under a third of demand. The demand for 3 and 4-bed units, however, is double the available lettings<sup>173</sup>.

## **Estate Regeneration & Council Housebuilding Programme**

Like many Local Authorities, Brent Council transferred larger and declining estates including Chalkhill, Church End and Stonebridge to Registered Providers in order to access government funding for their regeneration over the 1990s and 2000s, and has more recently done the same with Barham Park.

The 1960s South Kilburn Estate is the Council's largest remaining housing estate and is around halfway through a 20-year regeneration programme. Regeneration is transforming the area into a more sustainable and mixed use neighbourhood; increasing the number of homes from 1,200 to at least 2,400, and providing new supporting infrastructure and public realm. Brent Council is also considering options for St Raphael's Estate for either refurbishment with limited new build or comprehensive redevelopment.

Community consultation, engagement, involvement and buy-in at all stages is fundamental to any successful regeneration programme. The Greater London Authority (GLA) has published guidance on Council-led estate regeneration which emphasises the central importance of communities<sup>174</sup>.

Brent Council committed in 2019 to deliver 1,000 new council homes over the next 5 years, with the Council investing £200m alongside £65m in funding from the Mayor of London's Homes for Londoners programme. Priorities under the programme include delivering New Accommodation for Independent Living (NAIL), homes for temporary accommodation, and larger family homes.

## **Registered Provider Housing Stock**

In 2018, there were 55 Registered Providers (RP) operating in the borough, managing approximately 20,221 affordable homes to rent, to which the Council has nomination rights and can discharge its statutory housing duties<sup>175</sup>. The number of active RPs in Brent regularly varies, either because new players move into the borough or, more commonly, because of mergers. Of the 55 RPs, 25 are classed as small (less than 1,000 properties owned) and 30 large (more than 1,000 properties owned). Around 92% of affordable rent properties are managed by large RPs. Registered Providers stock is concentrated in the south of the borough, predominantly in areas with the highest levels of deprivation such as Harlesden, Kensal Green and Willesden Green. Registered Providers have strategic importance in Brent as a key asset to supplying required social housing properties. Since 1997 Registered Provider stock has increased by approximately 109%, a faster rate than London, having increased by circa 100% during the same period (Figure 96).

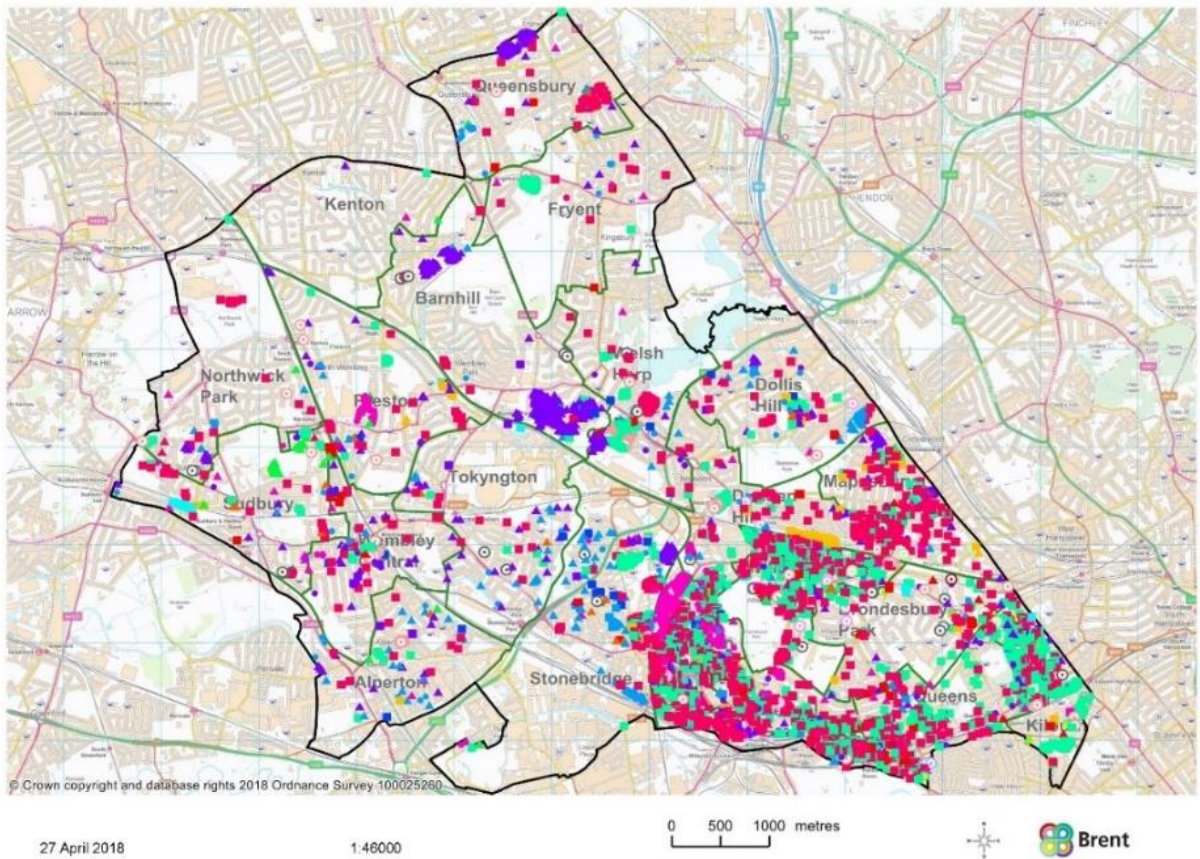
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<sup>173</sup> Draft HRA

<sup>174</sup> Greater London Authority (2019) Better homes for local people – The Mayor's Good Practice Guide to Estate Regeneration

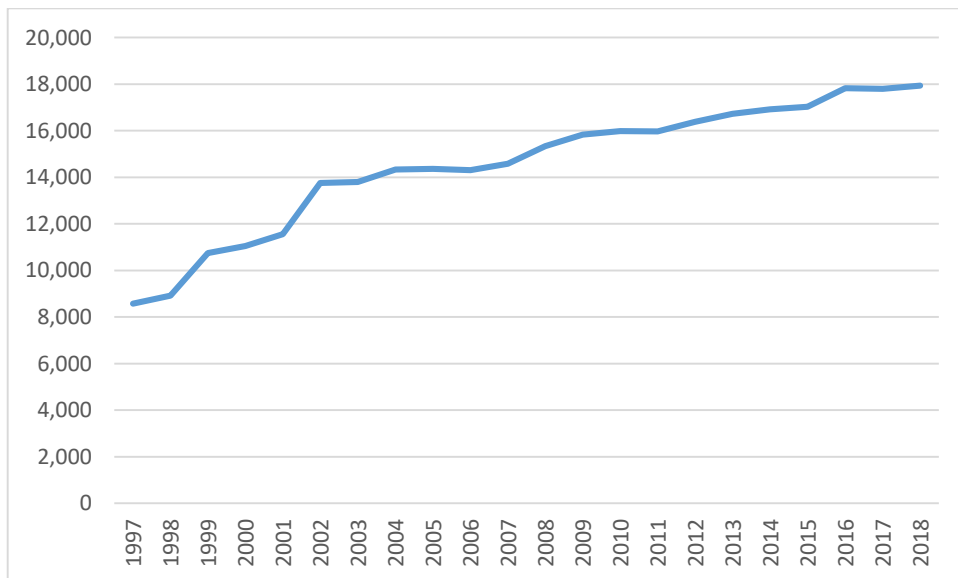
<sup>175</sup> Brent Council (2019) Brent Based Registered Providers delivery of social housing *Brent Council*: London

**Figure 96: Distribution of Registered Social Housing Providers in Brent**



Source: GIS, Brent Council: 2018

**Figure 97: Registered Social Landlord Housing Stock, Brent, 1997 – 2018**



Source: Ministry of Housing, Communities and Local Government, Table 115: Jan 2019

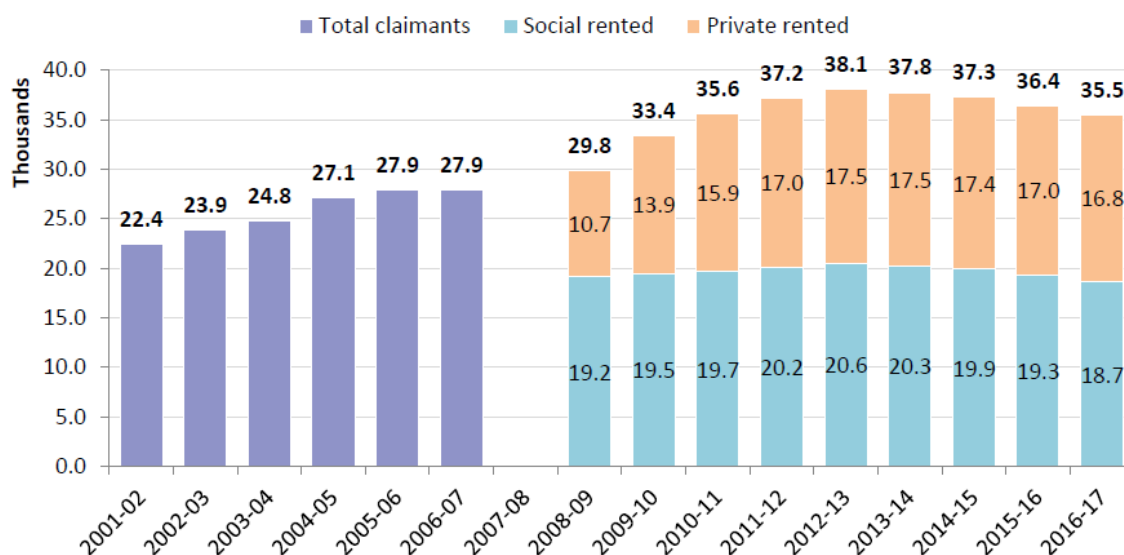
## Demand Management

One of the most fundamental issues and the biggest responsibility of the council relies on its ability to manage the housing stock, especially of individuals living in social housing and residents in housing need. Problems of affordability in the private sale and rental markets continue to worsen and, in the case of the latter, have been compounded by welfare reform and restrictions on Housing Benefit. Homelessness applications and acceptances have grown across London, with a particular growth in evictions from the private rented sector (PRS)<sup>176</sup>. The growth of the PRS, while making an important contribution to meeting housing demand, is concurrently a source of demand pressure, through evictions and service pressures, as the council responds to the need to raise standards and improve management. Moreover, there continues to be a growing need for specialist housing for individuals aged 65 years and over. These issues will be considered below.

## Housing Benefit

The number of housing benefit claimants in Brent reached its peak in 2012-13 at 38,099 (Figure 98), as of March 2018 this number is 34,488, around a 9.5% reduction. Whilst the average annual growth from 2001-02 to 2006-07 was 1,100 families, from 2006-07 onwards this increased around 1,700 families each year on average<sup>177</sup>. The increase in this period in housing benefit claimants, in particular those living in private rented housing, coincides with the increases observed on the housing register in Brent. It is likely that many households applying for housing benefit would have also registered their interest in affordable housing.

**Figure 98: Number of claimants in receipt of housing benefit in Brent by tenure, DWP**



Source: Department for Work and Pensions from London Borough of Brent SHMA: 2018

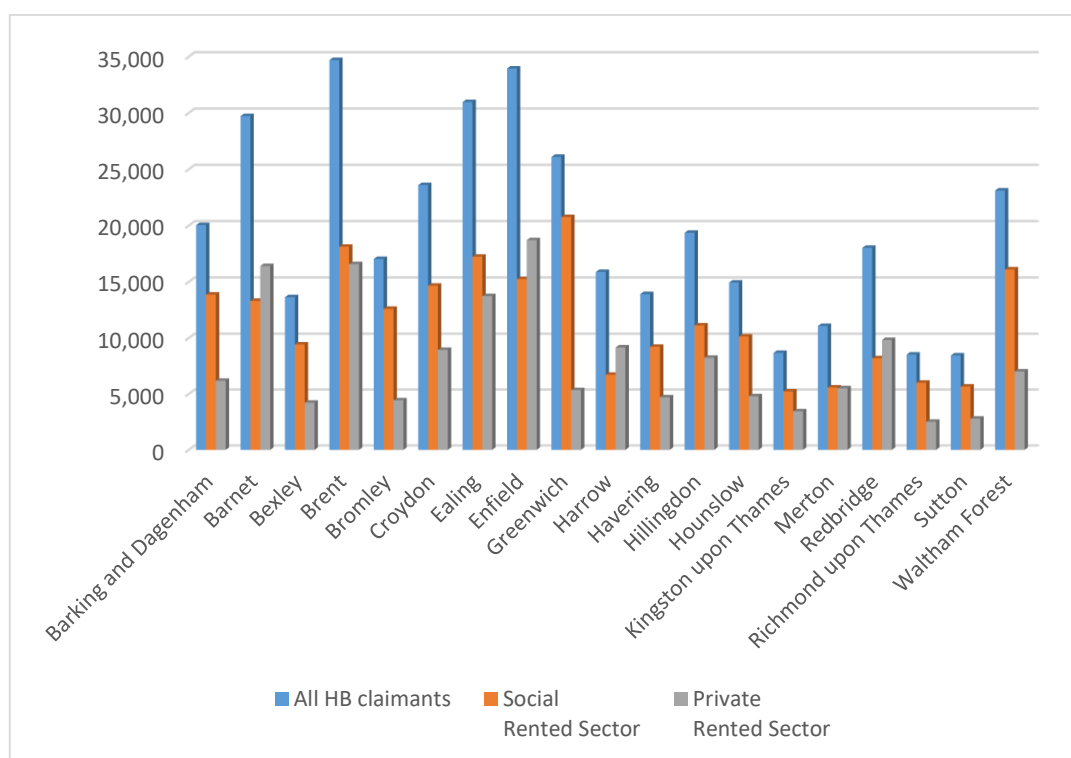
<sup>176</sup> Brent Council (2016) Scrutiny Committee: Housing Pressures in Brent, London: Brent Council

<sup>177</sup> Opinion Research Services (2018) London Borough of Brent Strategic Housing Market Assessment: Report of Findings, London: s.n.

The information relating to tenure of housing benefit claimants improved in 2008-09. It is clear to see that whilst the large majority of claimants are in social rented accommodation, there has been a rapid increase in the number of benefit claimants in PRS. The number of claimants in social rented housing increased from around 19,200 to 20,600 over the period 2008-09 to 2012-13 – a 7% increase per annum; in contrast the number of claimants in private rented accommodation increased from 10,700 to 17,500 in the same period – a 65% increase per annum<sup>178</sup>.

As of February 2018, 18,118 housing benefit claimants were in social rented accommodation in comparison to 16,572 in private rented sector. Brent has the highest number of housing benefit claimants in all of the outer London Boroughs, and has the 2<sup>nd</sup> highest number of housing benefit claimants in social rented accommodation (Figure 99).

**Figure 99: Outer London Borough comparison of Housing Benefit claimants by tenure, February 2018**



Source: Department for Work and Pensions, Table 2 Housing Benefit claimants by Local Authority by Tenure: May 2018

The number of housing benefit claimants has continued to decline from the peak in 2013, to May 2018 – now being around 34,581 (Figure 100). What the number of housing benefit claimants does not show is the number of individuals in affordable accommodation who are not in receipt of housing benefit but cannot afford market rents and therefore have an unmet need for affordable housing. The Strategic Housing Market Assessment (SHMA) outlines individuals who have an unmet need for affordable housing include those who are suffering from homelessness, those who are in temporary accommodation, and those who are in the reasonable preference category on the housing register. In total the 2018 SHMA for Brent identifies there is currently 6,212 households that are in affordable housing need that are unable to afford their own housing<sup>179</sup>. Further detail on individuals suffering from

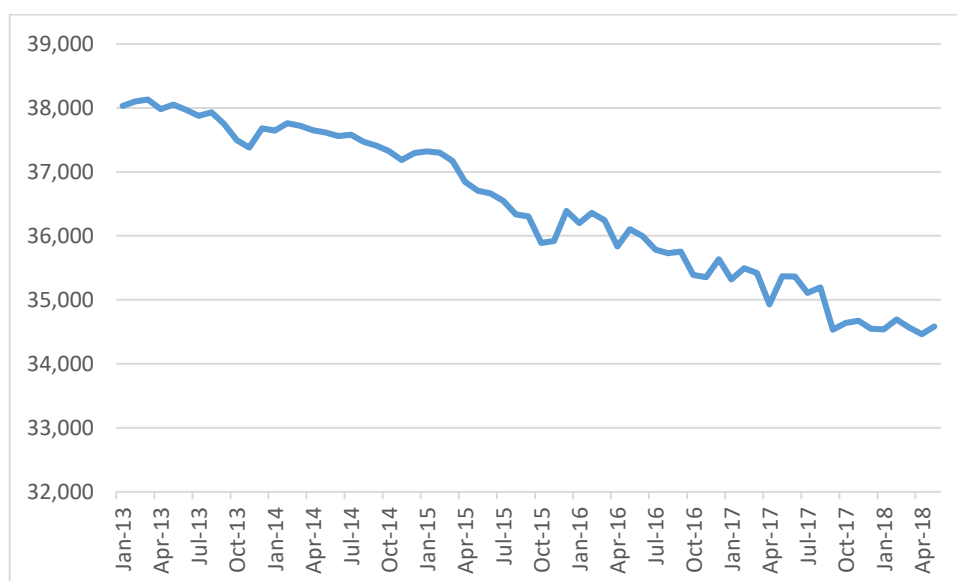
<sup>178</sup> Ibid

<sup>179</sup> Ibid



homelessness, individuals in Temporary Accommodation and overcrowding in Brent considered below.

**Figure 100: Number of claimants in receipt of housing benefit in Brent, Jan 2013 – May 18**



Source: Department for Work and Pensions, Housing Benefit Claimants Table 1 Jan 13 – May 2018: August 2018

## Homelessness

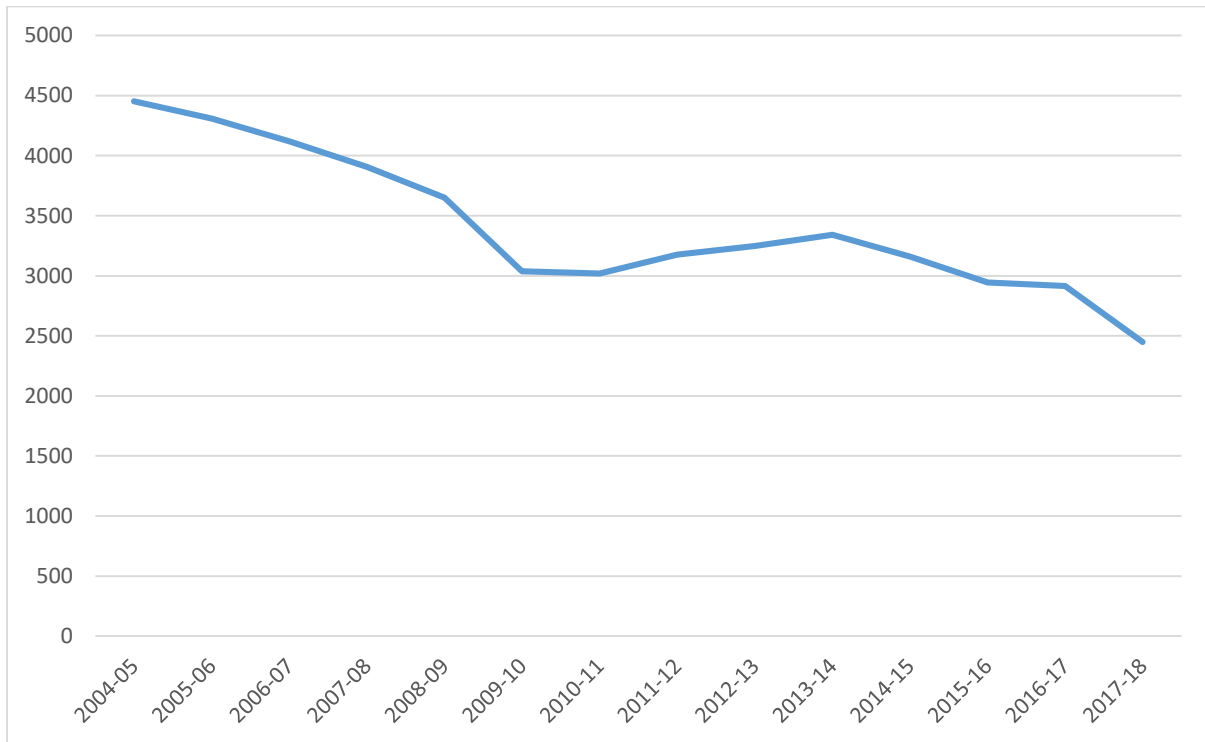
The failure to provide new housing supply across all tenures has exacerbated affordability problems in the private sale and rental markets. Structural factors like welfare reforms and lack of affordable housing contribute to households becoming, or being considered, homeless. There are also a number of personal causes such as poor physical and mental health or family breakdown. The legal definition of homelessness does not just incorporate individuals who are sleeping rough but also those who are at risk of losing their home or those who are at risk of violence and cannot continue to live in their current resident amongst other reasons. Brent's Housing Register monitors local housing need and all applicants seeking social housing in Brent must apply through its Housing Register. As of 1<sup>st</sup> April 2019, 3,161 households are in Bands A-C on the Housing Register, those considered to be in housing need. In the period from April 2015 to April 2019 there has been an average reduction of 8.3% year on year, with a 29% total reduction. Of those currently on the housing register the majority (around 70%) are accepted as homeless with overcrowding and requiring elderly specialist accommodation the next most common causes, around 9% each.

## Temporary Accommodation

Brent has had one of the largest temporary accommodation portfolios in the country for many years. At its peak, Brent had almost 1 in 25 households living in temporary accommodation<sup>180</sup>. Nevertheless, there has been downward trend in the number of households in TA. In 2004/05, 4,453 households were in some form of TA, by 2010/11 this had reduced to 3,019 households, and in 2019 at its lowest at 2,191 – a total reduction of around 50.3% over the 15-year period (Figure 101 & Figure 102).

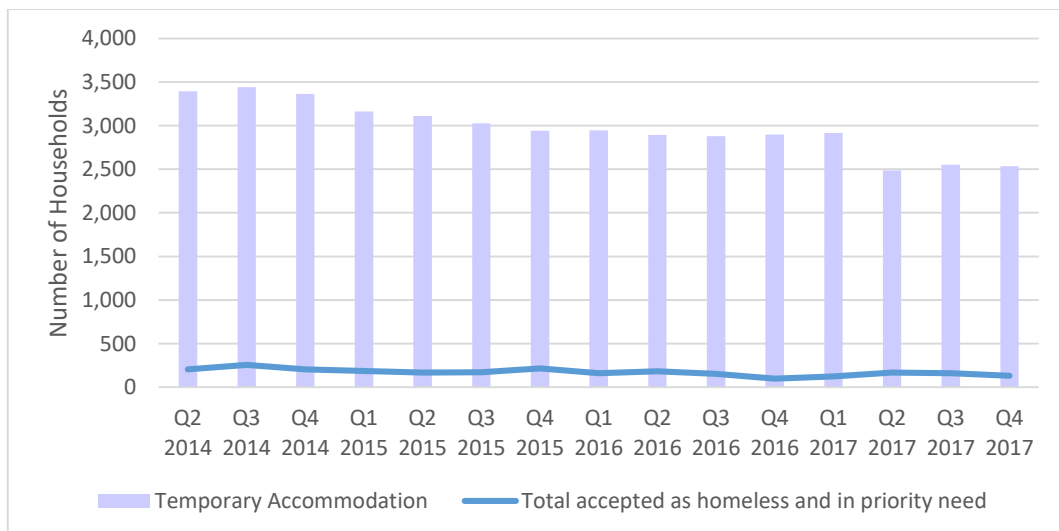
<sup>180</sup> Local Government Association (2017) Council innovation and learning in: Housing our Homeless Households, London: Local Government Association

**Figure 101: Number of households in Temporary Accommodation, 2004/05 – 2017/18**



Source: MHCLG Dec 2018. Live Table 784: Local Authorities' action under the homelessness provisions of the 1985 and 1996 Housing Acts

**Figure 102: Number of households in Temporary Accommodation and Total Accepted as homeless and in priority need by quarter, 2014 – 2017**



Source: MHCLG 2018. Live Table 792a: Local Authorities' action under the homelessness provisions of the 1985 and 1996 Housing Acts

Securing Temporary Accommodation has become much harder in recent years across London and in Brent there was rise in the use of B&B accommodation to a maximum of 285

households in October 2014, as well as self-contained hotel annexes and self-contained nightly paid private rented units<sup>181</sup>. Since then Brent has been successful in reducing the number of households in B&B and other unsuitable and high cost TA accommodation with only 51 households in B&B in March 2018. Whilst this number has now increased to just under 100, it goes against the wider London trend and the majority of households are residing in leased accommodation from private landlords. Brent has reduced the number of households in B&B TA and others through retaining one of the highest numbers of housing association leased properties of any council in England and maintaining a good relationship with housing associations such as Genesis, Network and Shepherds Bush that manage these properties; and devoting 80% of social lettings to homeless households in TA<sup>182183</sup>.

Brent Council is committed to reducing the overall number of households in TA and the 2016 Temporary Accommodation Reform Plan introduced a programme called 'Find Your Home', which was launched in August 2016, to prevent homelessness and thus the need for TA by intervening early when households are threatened with homelessness. The Housing Options team provide information and resources to affected households so they can access affordable PRS accommodation within the borough. The 'Find Your Home' makes use of the power provided by The Localism Act 2011 by making an offer of suitable accommodation in the PRS to end the homelessness duty, thus breaking the link between homelessness and direct access to social housing<sup>184</sup>. The 'Find Your Home' programme is for those threatened with homelessness and helps households identify a suitable property that is affordable in line with households benefit income and Local Housing Allowance (LHA) rent. In 2016-17, 415 households were prevented from becoming homeless, 296 of which were attributable to the 'Find Your Home Programme', by Q3 2017-18 this had increased to 943 and 517 households respectively<sup>185</sup>. A major barrier to the success of the programme is the affordability of accommodation, due to the average market rent in Brent being significantly higher than the Local Housing Allowance rate combined with the Government's Welfare Reform that caps the total amount of benefits a single or two parent family can receive at £442 p/w, which reduces the housing benefit entitlement received.

Another measure introduced in the TA Reform Plan was for the council to acquire a large portfolio of Private Rented Sector (PRS) accommodation, which would be professionally managed and in which costs could be protected against rental inflation<sup>186</sup>. i4B Holdings Limited was created in 2016 to facilitate the delivery of the options within TA Reform Plan as an 'arm's length' company for Brent Council. i4B Holdings Limited was set up with an initial loan of £1 million to meet the working capital required for the company. In November 2016, £100m was agreed by Cabinet to fund the acquisition and subsequent management of a target portfolio of 300 properties in and around Brent<sup>187</sup>. In 2017, Cabinet agreed i4B would provide services to the Council up to 2021 for a contract value of £2.3 million. As of 2 January 2018, i4B had 251 properties in the pipeline, either wholly purchased (86), in conveyancing (84) or approved by the PRS panel and under negotiation (81). Further investment of £116 million was made available to i4B in February 2018 to secure 300 additional private rented sector properties by 2021 as well as an additional £35m made available to fund the acquisition of 100 intermediate rent sector properties<sup>188</sup>. As of January 2019, the pace of acquisitions has been slower than

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<sup>181</sup> Ibid

<sup>182</sup> Local Government Association (2017) *Council innovation and learning in: Housing our Homeless Households*, London: Local Government Association

<sup>183</sup> Brent Council (2016) *Temporary Accommodation Reform Plan Annexe 1*, London: Brent Council

<sup>184</sup> Brent Council (2018) *Housing Scrutiny Committee: Find Your Home Progress Report*, London: Brent Council

<sup>185</sup> Ibid

<sup>186</sup> Brent Council (2016) *Temporary Accommodation Reform Plan Annexe 1*, London: Brent Council

<sup>187</sup> Brent Council (2018) *Cabinet Report: i4B Business Plan 2018/19*, London: Brent Council

<sup>188</sup> i4B Holdings Ltd (2018) *Business Plan 2018/19 and forward investment proposals 2018-2023*, London: i4B Holdings Ltd

anticipated with a total of 201 units purchase, 116 of which are within Brent. There are an additional 61 properties in the pipeline or in conveyancing or final authority stage.

## Overcrowding

In the 10-year period between 2001 and 2011 Census, overcrowding increased substantially. In Brent, there was an increase of 8,745 overcrowded units, from 23,943 to 32,688<sup>189</sup>.

**Figure 103: Proportion of overcrowded households 2011 for Brent 2001-2011**

	Occupancy rating (rooms)						Occupancy rating (bedrooms)	
	2001		2011		Net change		2011	
	N	%	N	%	N	%	N	%
<b>Brent</b>								
Owned	7,527	13.5%	6,324	12.9%	-1,203	-4%	4,588	9.4%
Private rented	8,134	40.3%	16,642	47.9%	+8,508	+19%	9,778	28.2%
Social rented	8,282	34.7%	9,722	36.6%	+1,440	+5%	5,152	19.4%
<b>All Households</b>	<b>23,943</b>	<b>23.9%</b>	<b>32,688</b>	<b>29.6%</b>	<b>+8,745</b>	<b>+24%</b>	<b>19,518</b>	<b>17.7%</b>
<b>All Households</b>								
<b>ENGLAND</b>	-	<b>7.1%</b>	-	<b>8.7%</b>	-	<b>+23%</b>	-	<b>4.6%</b>
Greater London	-	17.3%	-	21.7%	-	+25%	-	11.3%

Source: UK Census of Population, LBB SHMA 2018

Over this 10-year period, when considered by tenure, overcrowding has decreased by 1,203 households in the owner occupied sector, increased by 1,440 households in the social rented sector, with the largest increase in the private rented sector, from 8,134 to 16,642, a growth of 8,508 households. (Figure 103). The percentage of overcrowded households in the private rented sector has also had the biggest increase from 40.3% to 47.9%. The number of sharing households increased from 1,151 to 1,471 over the 10-year period 2001-11 an increase of 320 households (28%).

## Under-Occupation

Brent Council runs an Under-Occupation scheme designed to help council tenants who are under occupying their property to transfer to a smaller home, in order to provide more suitable accommodation to tenants with larger families and make more efficient use of the existing housing stock. Financial incentives are offered to under-occupiers within Brent, as well as support with moving. There are also opportunities to use new developments to provide bespoke solutions to persuade existing under-occupying tenants to move.

<sup>189</sup> Brent Council (2013) *Brent 2011 Census Profile*, London: Brent Council

From October 2018 – October 2019, 31 households were successfully rehoused into smaller properties under the scheme; predominantly freeing up 3-bedroom properties and helping to meeting Brent's increased demand for family-sized accommodation. Moving forward, as part of Brent's Council Housebuilding Programme, a number of new build properties are being developed and ringfenced for under-occupiers.

## **Rough Sleepers**

From 2010 to 2018 rough sleeping in England increased by 165% and is most severe in London. Welfare reforms to housing benefit and local housing allowance have been said to contribute to the rise in the number of rough sleepers amongst an increase in the number of non-UK nationals who are unable to access benefits<sup>190</sup>. The effects of rough sleeping are dangerous and damaging to both physical and mental health, moreover long periods of rough sleeping increases risks of being trapped in the streets thus becoming a target and vulnerable victim to crime, developing alcohol and drug dependency or even death. A study by Crisis in 2016 found 30% of rough sleepers had been assaulted within the last 12 months with 56% receiving some form of verbal abuse<sup>191</sup>.

In 2017/18, 200 individuals were recorded rough sleeping in Brent. A 32% decrease on figures from 2016/17. A stark contrast to the 39% increase from 2015/16 to 2016/17 which included a 100% increase in the number of 'stock' rough sleepers (people who were also seen rough sleeping in 2015/16) and a 22% increase in the number of 'flow' rough sleepers (people who had never been seen rough sleeping prior to 2016/17). In comparison, there were reductions across all measures in the number of rough sleepers in Brent from 2016/17 to 2017/18 (Figure104). The majority of rough sleepers in Brent in 2017/18 were seen sleeping rough only on one occasion and were mainly distributed in the wards of Northwick Park and Stonebridge (Figure105)<sup>192</sup>.

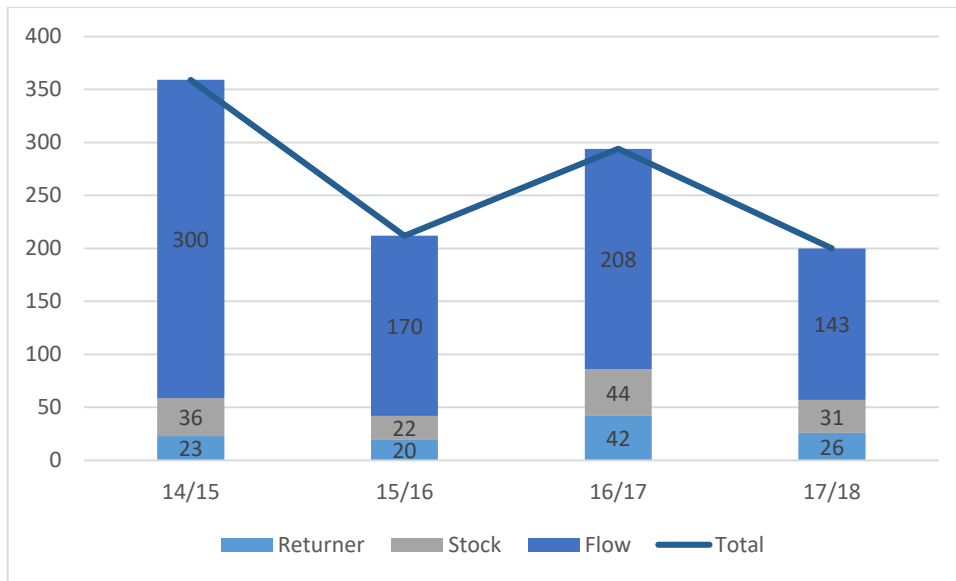
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<sup>190</sup> House of Commons Library (2019) *Briefing Paper: Rough Sleeping (England)*, London: House of Commons Library

<sup>191</sup> Sanders, B. & Albanese, F. (2016) *'It's no life at all' Rough sleepers' experiences of violence and abuse of the streets of England and Wales*, London: Crisis

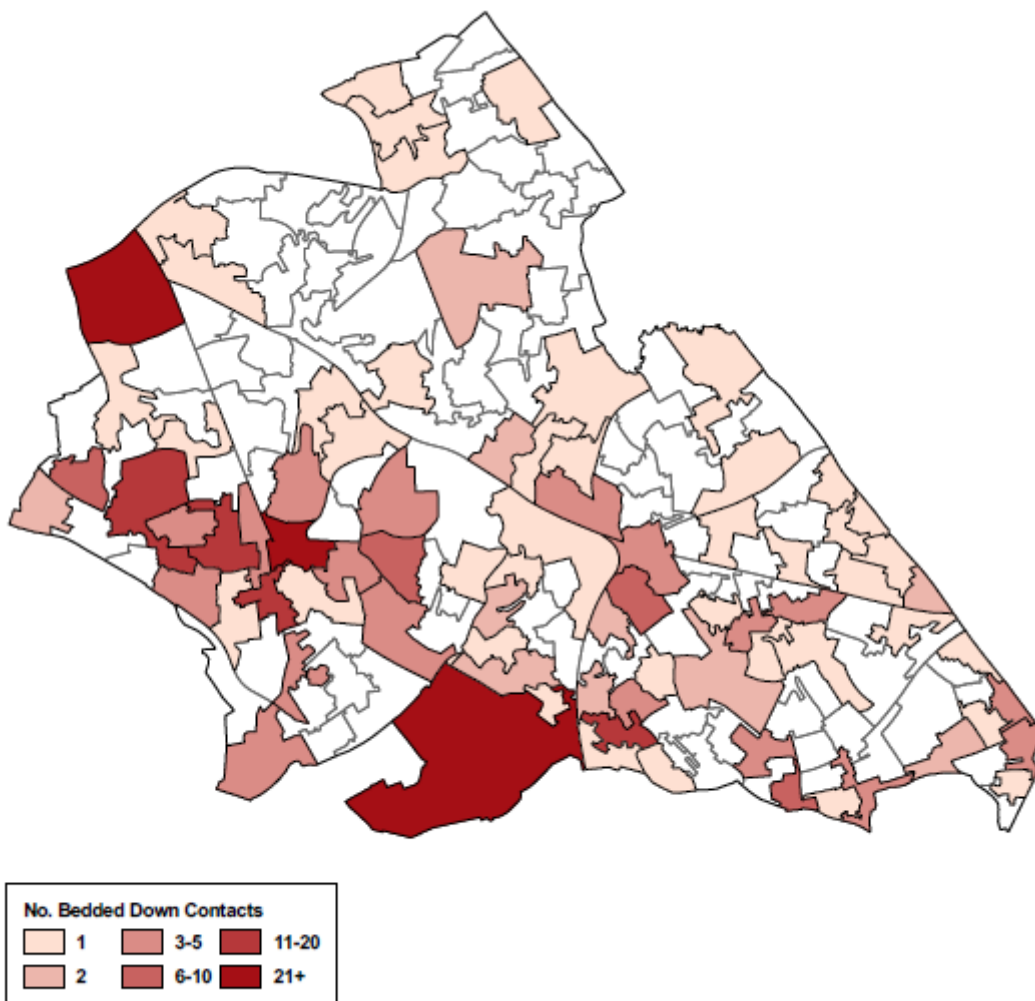
<sup>192</sup> Greater London Authority (2017) *CHAIN Annual Report: Brent April 2016 – March 2017*, London: Greater London Authority

**Figure 104: Number of people seen rough sleeping: Flow, stock, returner model, Brent 2013 2018**



Source: CHAIN Annual Report – Brent Borough Profile: 2017/18

**Figure 105: Bedded down street contacts by area 2017/18**



In order to prevent homelessness and help rough sleepers, Brent Council is working closely with St Mungo's to deliver an outreach programme called Brent Outreach. Nonetheless, many rough sleepers are not aware of the support provided by the council.

## Specialist Housing Provision

Following the 2012 report *Housing Our Ageing Population* report (HAPPI2), it was established that specialist housing units were required to accommodate the ageing population. The specialist housing requirements were modelled using the Housing LIN methodology (2012)<sup>43</sup>. The Housing LIN methodology forecasts future population and then applies a benchmark need for particular housing types per thousand people aged 75+. This defines specialist provision as mainstream (including adapted and wheelchair homes), specialised housing (including Extra Care and sheltered housing), and Care Homes (including both Registered Nursing and Registered Care Homes). Brent's current Older Person Housing stock shows that there are around 1,500 units<sup>193</sup>.

The Disabled Facilities Grant is available for adaptations to support people with disabilities to live more independently in their homes. Adaptations that can be made include installation of stair lifts, hoists, ramps, accessible showers, specialist kitchens, etc. Between 2008/09 to 2018/19, there has been a 40% increase in the total spend for Disabled Facilities Grant in Brent – from £2.92m to £4.08m – doubling the number of properties completed in the same period. In July 2018, the Council set up the discretionary Disabled Adaptation Grant under the powers of the Regulatory Reform Order that has removed the necessity of a financial assessment and improved access to the scheme.

## NAIL Project

Brent is currently developing and rolling out its New Accommodation for Independent Living (NAIL) project, which aims to identify develop and acquire alternative forms of care to residential care for all vulnerable adult groups in Brent. The rationale behind NAIL is that it is preferable for elderly people to stay in their communities, rather than moving into residential care. Residential care is also very costly to the borough and the new forms of care explored in the NAIL project could be more cost-efficient, while providing for a higher quality of life, by encouraging independent living and more bespoke and personalised care packages.<sup>194</sup> In 2017, it was estimated that NAIL would provide an average weekly saving of £332 per person, compared to accommodation provided in a care setting, and more recent operational figures indicate an average saving of £250 per person.<sup>195</sup>

The project uses knowledge from both Housing and Adult Social Care, with the aim of developing sustainable care plans. Whilst Adult Social Care officers have a strong understanding of the requirements of people who need accommodation and support, Housing colleagues have a stronger understanding of the regulations, processes and potential issues around building or converting accommodation, and Planning colleagues bring their expertise and input around planning processes and ensuring development is sustainable.

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<sup>193</sup> Opinion Research Services (2016) London Borough of Brent Strategic Housing Market Assessment: Report of Findings, London: s.n.

<sup>194</sup> Brent Council (2016) *Community and Wellbeing Scrutiny Committee: Update on New Accommodation for Independent Living (NAIL) project*, London: Brent Council

<sup>195</sup> Brent Council (2017) *Cabinet Report: NAIL Programme Accommodation and Financial Mitigation Plan*, London: Brent Council

Long-term development plans are forecast to meet the NAIL Programme's long-term targets, however an increased number of short term units are required to provide a more balanced and sustainable savings profile and meet Adult Social Care's current accommodation requirements. To mitigate this, there was an acquisition of approximately 80 units (16 houses) and support on a number of leasing arrangements for the NAIL scheme this In March 2018<sup>196</sup>.

## Partnership Working

Brent council works with different partners such as housing associations, developers and registered providers. This is to make sure that the council gets an agreed level of nomination rights to housing association properties, monitor the cost and progress of development within the borough and to make sure in the case of housing association that they keep rents affordable by managing development costs.

## Registered Providers

Registered Providers (RPs) are integral in Brent for providing both existing social housing stock, as well as delivering new affordable dwellings. Registered Providers (RPs) are the primary source of affordable housing, whether grant funded or secured through S106 agreements. Across London RPs are becoming integral to housing delivery with the GLA entering into strategic partnerships with a number of G15 RPs, with partnerships already agreed with L&Q, Genesis, Clarion, Network, Notting Hill, Optivo and Peabody – a number of which the Council has strong relationships with<sup>197</sup>. Through these strategic partnerships the GLA offer favourable grant rates to associations that are willing to build at least 60% affordable housing on new developments – L&Q signed the first partnership agreement last year to build 12,000 affordable homes using £400m of GLA grant<sup>198</sup>. Moreover, 55% of the £3.5 billion allocated by the GLA to deliver 90,000 units by 2021 has been given to RPs and Councils<sup>199</sup>. Brent is mirroring the GLAs development of relationships with RPs with a view to capture of as much investment in housing as possible. The Council has the opportunity to attract more inward investment by developing Joint Ventures with RPs particularly if the RP is a strategic partner of the GLA<sup>200</sup>.

## Private Developers – Volume homebuilders

The current London Plan has established the importance of partnerships with private developers in order to meet current and future housing demand<sup>201</sup>. A core task is securing new housing of the highest quality and protecting and enhancing residential neighbourhoods. The homebuilding sector is dominated by the volume developers, with a quarter of all new homes in 2015 being built by the three largest companies (Persimmon, Taylor-Wimpey and Barratt)<sup>202</sup> and the ten largest firms accounting for 60% of all new private homes<sup>203</sup>. This

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<sup>196</sup> Ibid

<sup>197</sup> Brent Council (2018) CMT Report: Housing Supply and Affordability, London: Brent Council

<sup>198</sup> Mayor of London, London Assembly (2017) Mayor strikes landmark deal for 20,000 new homes, (Published 6<sup>th</sup> April 2017) Available at: <https://www.london.gov.uk/press-releases/mayoral/mayor-strikes-landmark-deal-for-20000-new-homes>

<sup>199</sup> Greater London Authority (2018) The Greater London Authority Consolidated Budget and Component Budgets for 2018-19, London: Greater London Authority

<sup>200</sup> Brent Council (2018) CMT Report: Housing Supply and Affordability, London: Brent Council

<sup>201</sup> Greater London Authority (2017) The London Plan: The spatial development strategy for Greater London, Draft for public consultation, London: Greater London Authority

<sup>202</sup> Department for Communities and Local Government (2017) Fixing our broke housing market, London: Department for Communities and Local Government

<sup>203</sup> Ibid



contrasts to past trends where small builders had a much larger proportion. In 1988, small builders were responsible for 4 in 10 new build homes but have just 12% of the market share now. The increased demand for delivery of large scale housing schemes has meant building opportunities are out of reach of small building companies – from 2006 to 2016 **the average permissioned housing scheme has increased in size by 17%**<sup>204</sup>. The larger house builders can only (and only want to) build so much. As such the new London Plan (2017) has set targets to increase the number of small sites (less than 0.25 hectares in size) identified for development. The 10-year target for Brent is 10,230 – annualised this is 1,023 new homes. The London Plan (2017) identifies these targets will also help revive the role of small and medium-sized developers in delivering new homes in London<sup>205</sup>. To complement this the Mayor launched his ‘Small Sites, Small Builders’ programme in February 2018 in partnership with Transport for London (TFL). The programme aims to make small plots of publicly-owned land more accessible to London’s small and medium-sized builders with TFL bringing forward ten of its small sites for development, with capacity ranging from between 2 and 42 homes<sup>206</sup>.

## Private Rented Sector

12% of households in London moved in the last year (including those who moved to London from elsewhere), and 72% of those moves were either into or within the private rented sector<sup>207</sup>. Both in Brent and across England, there has been the rise in the relative size of the private rented sector and the decline in owner occupation. In Brent, owner occupation declined from 56% to 44% between 2001 and 2011, while private rent increased from 20% to 31% in the same period. The overall balance between owners and renters has changed in 2011 compared to the position in 1981, with 54% of households in owner occupied accommodation in 1981 reducing to 44% in 2011. Furthermore, the balance between social rent and private rent has also changed: 44% of tenants rented privately in 1981 (20% out of 46%) whereas more than half rented privately in 2011 (31% out of 56%).

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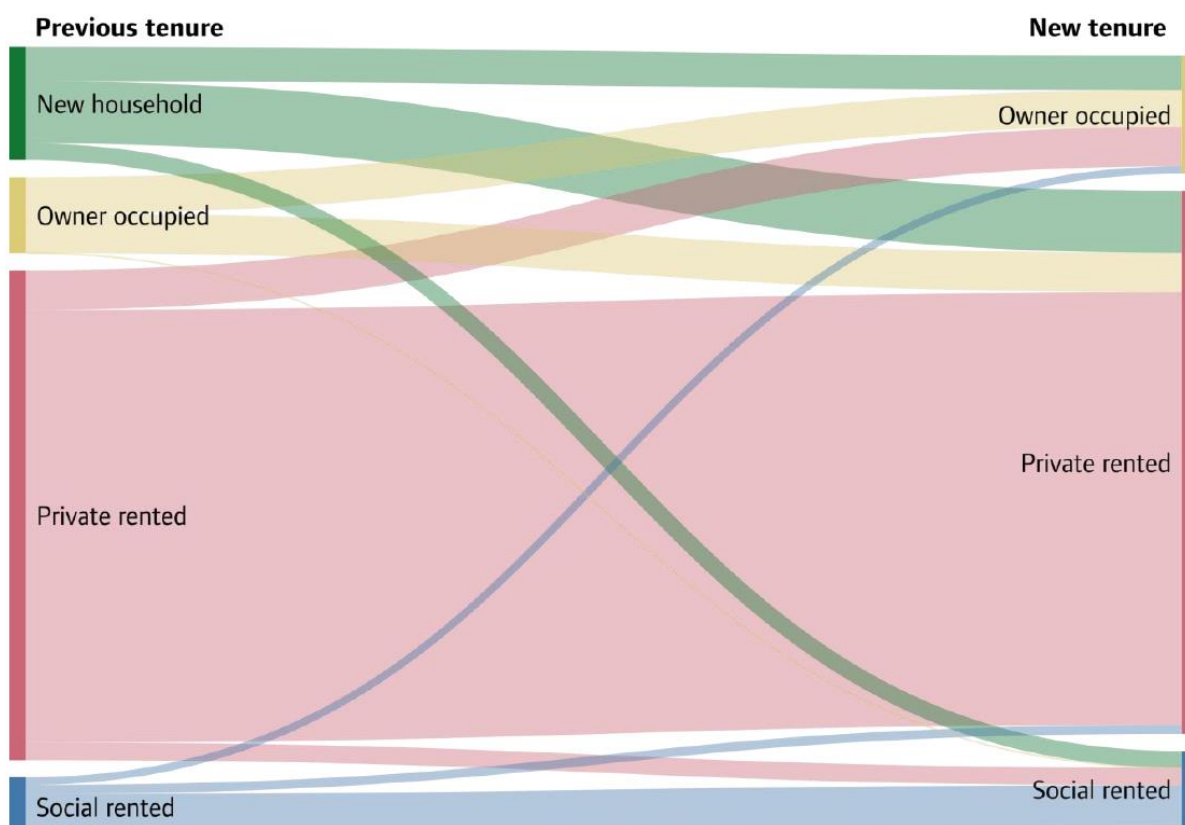
<sup>204</sup> Home Builders Federation (2017) Reversing the decline of small housebuilders, London: Home Builders Federation

<sup>205</sup> Greater London Authority (2017) The London Plan: The spatial development strategy for Greater London, Draft for public consultation, London: Greater London Authority

<sup>206</sup> Mayor of London, London Assembly (2018) *Mayor launches small homebuilders scheme with TFL* (Published 6<sup>th</sup> February 2018) Available at: <https://www.london.gov.uk/press-releases/mayoral/mayor-launches-small-homebuilders-scheme-with-tfl>

<sup>207</sup> Greater London Authority (2017) *HOUSING IN LONDON: 2017 The evidence base for the Mayor's Housing Strategy*, London: Greater London Authority.

**Figure 106: Flows between tenures of London Households moving in the last year**



Source: GLA, *Housing in London: 2018*

Examining trends of tenure mix for Brent over the last thirty years, it is evident that there have been some significant changes in the balance between owner occupiers and tenants renting their home (Figure 106).

From 1981-1991: the number of owner occupiers increased from 48,000 to 54,000 households, an increase of 12.5%. There was a less significant change in the number of private tenants, which decreased from 18,000 to 16,000. The number of tenants in social rented sector remained relatively flat at 23,000.

From 1991-2001: the number of owner occupiers continued to increase albeit at a slower pace (increasing from 54,000 to 56,000 households, an increase of 3.7%); however, this was alongside significant growth in the number of private tenants, increasing from 16,000 to 20,000 households, an increase of 25%. The number of social tenants continued to remain relatively flat increasing only marginally from 23,000 to 24,000 households.

From 2001-2011: the number of owner occupiers decreased from 56,000 to 49,000 households, a decrease of 12.5% whilst the number of private tenants continued to increase significantly, from 20,000 to 35,000 households, an increase of 75%. The number of social tenants also increased, though less significantly, from 24,000 to 27,000 households, an increase of 12.5%.

The Private Rented Sector is increasingly becoming the gateway tenure for those new to the city and encompasses individuals on a wide range of incomes. There are variations in the quality of supply of units within the private rented sector within London, and in Brent – from top quality professional lettings to illegal and unregulated beds in sheds. In April 2014, Brent Council approved the introduction of an Additional Licensing scheme, covering all Houses in

Multiple Occupation (HMOs) in the borough and in August 2014 approved the introduction of a Selective Licensing scheme, covering all private rented housing in the wards of Harlesden, Wembley Central and Willesden Green<sup>208</sup>. From the 1<sup>st</sup> June 2018, this extended to all privately rented properties in Dudden Hill, Kensal Green, Kilburn, Mapesbury and Queen’s Park. These measures have been introduced to reduce anti-social behaviour, deprivation and poor housing conditions in Brent. Additional benefits of introducing Additional and Selective Licensing schemes in Brent include the amplified profile of the Private Rented Sector including increased awareness of housing management and tenancy issues, the creation of a database of 2,500 licensed landlords which are deemed ‘fit and proper’ and better regulation of HMO use through closer working with planning enforcement<sup>209</sup>.

As of Q3 2018, Brent had the 13<sup>th</sup> highest median private rent levels in London, and the second highest median private rent levels in outer London<sup>210</sup>. There are also variations in the concentration and distribution of renters in certain areas. The highest proportion of private renting in Brent is within Mapesbury and Willesden Green where 45% and 43% of the population privately rent respectively<sup>211</sup>. In comparison Northwick Park and Stonebridge have a much lower percentage of private renters, with just 19% and 15%, whilst maintaining a much higher level of individuals on social rent (65% in Stonebridge)<sup>212</sup>. This has meant there is a growing high quality segment within the sector for those able to pay mainly concentrated in the south of the borough, in comparison at the other end of the spectrum where there is prevalence of disrepair, poor management and overcrowding. These issues are reflected in the higher median rents in postcodes in more affluent or developing areas such as NW6, which are way above the borough wide Brent median (Figure 107).

**Figure 107: Median Rents Variation Comparison**

	<u>1 Bed</u>	<u>2 Bed</u>	<u>3 Bed</u>
<u>London (Median)</u>	£1,281	£1,500	£1,800
<u>Brent (Median)</u>	£1,250	£1,499	£1,800
<u>NW6</u>	£1,473	£1,893	£2,557
<u>HA9</u>	£1,182	£1,400	£1,650
<u>NW10</u>	£1,275	£1,556	£1,950
<u>HA0</u>	£1,100	£1,350	£1,650
<u>NW2</u>	£1,300	£1,560	£1,950
<u>NW9</u>	£1,200	£1,350	£1,675

Source: Valuation Office Agency: March 2019

<sup>208</sup> Brent Council (2017) Cabinet Report: Selective licensing in the Private Rented Sector, London: Brent Council

<sup>209</sup> Brent Council (2018) Cabinet Report: The impact of Landlord licensing in Brent, London: Brent Council

<sup>210</sup> Valuation Office Agency (2018) Summary of monthly rents recorded per 12 month rolling period: Data updated quarterly by local authority areas for England, London: Valuation Office Agency. Available at: <https://data.london.gov.uk/dataset/average-private-rents-borough>

<sup>211</sup> Brent Council (2017) *Housing Strategy 2017-2022: Consultation Draft*, London: Brent Council.

<sup>212</sup> Ibid

Wembley has become a centre for the Private Rented Sector with Quintain, in 2017, announcing plans to develop 5000 PRS homes around Wembley Stadium, becoming the largest build to rent site in the UK<sup>213</sup>.

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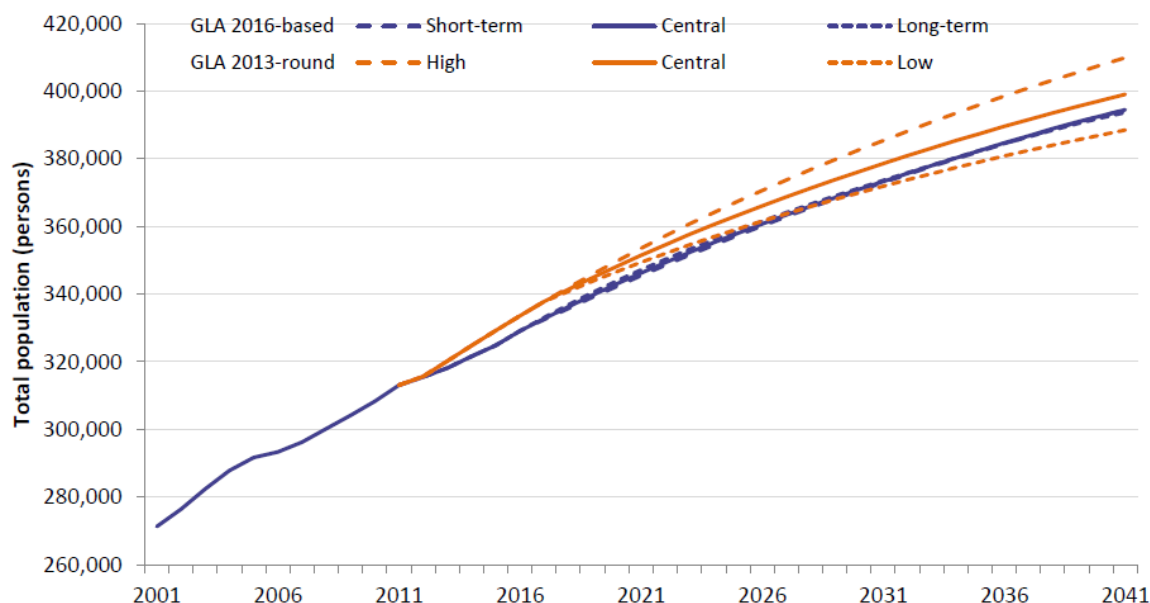
<sup>213</sup> Quintain (2017) *Wembley Park set to become the largest build to rent development site in the UK* (Published 7<sup>th</sup> February 2017)  
Available at: <http://www.quintain.co.uk/news-and-media/press-releases/2017/07-02-2017>

## Trends

### Trend 1: Change in demographic structure and household mix

Over the next 20 years, projections show an anticipated 68% increase for the older population (65+) in Brent between 2019 and 2040. In 2019, 32% of the population in Brent are aged 0-24, compared with London's 31%<sup>214</sup>. The central trend projections show that this age range will increase in population 7% between 2019 and 2040 in London and Brent<sup>215</sup>.

**Figure 108: GLA estimates and projections for Brent period 2001-2037**



Source: ONS and GLA from London Borough of Brent SHMA: 2018

Core working age population 25-64, which is 56% of Brent's population in 2019, is projected to increase 11% by 2040 versus London's 13% increase for the same period.

**Figure 109: Age range 19-24 (Young adults)**

	2019	2040	2050
Brent	26,100	28,700	30,100
London	677,700	776,600	781,100

Source: GLA Population Projections - Custom Age Tables: Housing Led Population Projections 2017

<sup>214</sup> GLA Population Projections - Custom Age Tables: Long trend 2017

<sup>215</sup> ONS (2016) 2014-Based subnational population projections for Local Authorities in England: table 2. Available at: [www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/datasets/localauthoritiesinenglandtable2](http://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/datasets/localauthoritiesinenglandtable2)

**Figure 110: Age range 25-64 (Core working age)**

	<b>2019</b>	<b>2040</b>	<b>2050</b>
Brent	190,800	212,700	218,600
London	5,193,500	5,891,100	6,037,500

*Source: GLA Population Projections - Custom Age Tables: Housing Led Population Projections 2017*

There will be an increase in the number of elderly people by 2040, 28% of people aged above 65 will be over 81 in Brent.

**Figure 111: Age range (65-80) (older)**

	<b>2019</b>	<b>2040</b>	<b>2050</b>
Brent	30,700	49,100	53,500
London	811,700	1,250,000	1,364,600

*Source: GLA Population Projections - Custom Age Tables: Housing Led Population Projections 2017*

**Figure 112: Age range (81+) (increased care needs)**

	<b>2019</b>	<b>2040</b>	<b>2050</b>
Brent	9,800	18,900	24,500
London	265,900	490,200	639,800

*Source: GLA Population Projections - Custom Age Tables:  
Housing Led Population Projections 2017*

These demographic changes will prompt the need for different housing typologies, increasing the demand for extra care, sheltered housing and leasehold schemes for the Elderly (Figure 113). Therefore, councils will need to offer alternative, specialist accommodation for individuals in greater need. This will require increased collaboration between social care and housing departments.

**Figure 113: Additional Housing LIN Toolkit modelled demand for older person housing 2016 – 2041**

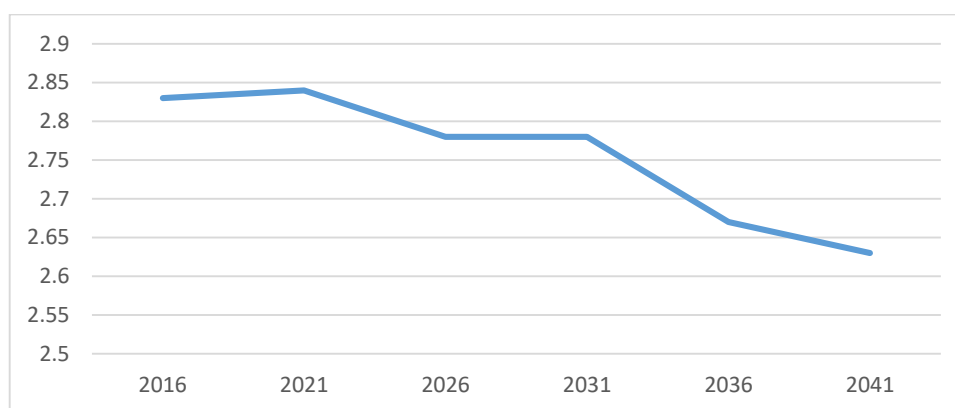
		Brent
<b>Population aged 75+</b>		
2016		17,300
2041		34,800
<b>Change 2016-41</b>		<b>17,500</b>
<b>Additional Modelled Demand for Older Person Housing</b>		
<b>Traditional sheltered</b>		1,000
Extra care	Owned	500
	Rented	300
Sheltered 'plus' or 'Enhanced' Sheltered	Owned	200
	Rented	200
Dementia		100
Leasehold Schemes for the Elderly (LSE)		2,100
<b>TOTAL</b>		<b>4,400</b>
<i>Percentage of Overall OAN</i>		9.2%

Source: London Borough of Brent SHMA: 2018

Despite an increase in the percentage of individuals aged 65 and above, the majority of Brent's core population will be at working age.

Whilst historic and current trends show a rise in household size in Brent (since 1991), the Office for National Statistics estimate household sizes to decrease rapidly over the 20-year period (Figure 114).

**Figure 114: Brent Average Household Size, 2016-2041**



Source: Office for National Statistics: 2016-based household projections for Local Authorities and higher administrative areas in England

However, evidence suggests a high need for 3-bedroom market housing and, to a lesser extent, in affordable housing. (Figure 115). This is due to high amounts overcrowding currently in a lot of affordable houses and the need to rectify this, combined with a growing trend towards multi household families in both affordable and open market housing<sup>216</sup>.

<sup>216</sup> Opinion Research Services (2018) London Borough of Brent Strategic Housing Market Assessment: Report of Findings, London

**Figure 115: Full objectively assessed need for housing: size and tenure mix across Brent for Long-term migration 2016-2041**

	Brent	Percentage of OAN
<b>MARKET HOUSING</b>		
1 bedroom	3,700	7.7%
2 bedrooms	5,300	11.0%
3 bedrooms	13,500	28.1%
4 bedrooms	3,300	6.9%
5+ bedrooms	100	0.2%
<b>Total Market Housing</b>	<b>25,900</b>	<b>54%</b>
<b>AFFORDABLE HOUSING</b>		
1 bedroom	4,200	8.8%
2 bedrooms	9,000	18.8%
3 bedrooms	5,800	12.1%
4 bedrooms	2,500	5.2%
5+ bedrooms	600	1.3%
<b>Total Affordable Housing</b>	<b>22,100</b>	<b>46%</b>
<b>TOTAL</b>	<b>48,000</b>	<b>100.0%</b>

Source: London Borough of Brent SHMA: 2018

## Trend 2: Worsening Supply & Demand Imbalance

Housing supply has in any case not been able to keep pace as demand has increased both in total number of dwellings and in the need for affordable homes. Brent's Local Plan Core Strategy published in 2010 set out the need for 22,000 home to be delivered between 2007 and 2026. This estimated a need of around 1,157 additional new dwellings per annum far lower than the target set in the Draft London Plan (2017). In 2017/18 there were 1,310 net additional dwellings completed in Brent, falling short against the London Plan (2016) target of 1,525 per annum<sup>217</sup>. This contrasts to the net additional dwellings completed in 2016/17, where Brent exceeded the target by just under 50%<sup>218</sup>.

<sup>217</sup> Brent Council (2018) Authority Annual Monitoring Report & Housing Trajectory 2017/18: Brent Council

<sup>218</sup> Brent Council (2017) Authority Annual Monitoring Report & Housing Trajectory 2016/17: Brent Council



**Figure 116: Housing Trajectory 2010-2023, Brent Council 2017/18**



Source: Brent Council 2017/18

The 2018 Brent SHMA identified the Full Objective Assessed Need for Housing in Brent to be 48,000 dwellings between 2016 – 2041, equivalent to an average of 1,920 additional dwellings per annum. However, The Draft London Plan (2017) sets a higher annual target for Brent of 29,150 additional dwellings to be delivered from 2019/20 to 2028/29<sup>219</sup> and the emerging Brent Local Plan identifies potential delivery of a minimum of 27,482 homes in the period 2019/20 – 2028/29. This is a significant increase and puts extra pressure on Local Authorities to encourage housebuilding. Whilst the comparative period differs, the per annum average target of 2,915 set out in the Draft London Plan (2017) is considerably higher than previous targets and recent delivery performance. Brent Council feels that the target is unachievable based on the over-emphasis of the potential of development on small sites, the limited availability of large sites, as well as unpredicted changes in market conditions<sup>220</sup>. Despite this, Brent Council does not anticipate the target to reduce significantly at all<sup>221</sup>.

Moreover, the targets set in the Draft London Plan and the Brent Local Plan Preferred Options are far higher than historical housing delivery. The 10 year targets state London should be delivering around 66,000 additional homes per year over the next 10 year period, however from 2011 - 2016 an average of 20,000 homes have been built each year<sup>222</sup>. To meet the targets set housing delivery would have to return to levels of the 1930s where an average of 61,500 were built per annum. Although the targets set in the Draft London Plan will not be confirmed until after the plan is adopted (scheduled for autumn 2019), the already severe supply and demand imbalance will dramatically worsen over the next 20-year period without a radical step change in delivery.

<sup>219</sup> Greater London Authority (2017) The London Plan: The spatial development strategy for Greater London, Draft for public consultation, London: Greater London Authority

<sup>222</sup> Greater London Authority (2018) HOUSING IN LONDON: 2018 The evidence base for the Mayor's Housing Strategy, .

## Affordable Housing

The Brent 2018, SHMA provides further evidence that additional affordable housing for 21,952 households is required over the period 2016-41. This is equivalent to an average of 878 households per year, which represents 52.3% of the demographic growth for Brent<sup>223</sup>. Over this period, the number of households in need of affordable housing will increase by 13,409, alongside an increase of 26,102 households looking for homes at market rates. This represents 33.9% of the total household growth projected based on demographic trends<sup>224</sup>. Any losses from the current stock (through demolition, clearance, or Right to Buy) would increase the number of affordable dwellings needed by an equivalent amount.

The demand for affordable housing is split between social rent, intermediate rent and shared ownership, social rent being the most prevalent in Brent. From 2014 to 2016, shared ownership had delivered additional housing for nearly 3% of the demand not met by the unassisted residential market. Also, Help to Buy has contributed an additional 8% to the sales market<sup>225</sup>. The promotion of low cost home ownership within London has continued to develop over recent years with additional help provided by the 2008 creation of the 'First Steps' programme. The 'First Steps' programme sets out an eligibility criteria predetermined by income to help individuals and families within London onto the property market. In June 2015, 27,000 homes had been delivered through the programme, which has helped around 42,000 Londoners<sup>226</sup>. Like London, the Brent 2019 SHMA sets out a need to increase the supply of affordable housing through intermediate products including shared ownership and affordable rent <sup>227</sup>.

Social rent represents the main supply of affordable housing in Brent. Social housing stock constitutes nearly a quarter of the housing stock in the borough, the council is still the largest single owner and manager of social housing in the borough, but, the decline in local authority housebuilding and transfer of larger council housing estates in the 1990s and 2000s, means the majority of social housing is now owned and managed by Registered Providers. PWC estimates social renters will decrease to 21% of household tenures in London by 2025<sup>228</sup>.

Current planning policy in Brent requires more social rented housing to meet local needs in new affordable housing developments. A ratio of 70% social rent/London Affordable rent and 30% intermediate is required for new affordable housing development in Brent's Local Plan<sup>229</sup>. This policy option is driven by the relatively lower incomes of individuals and households in Brent. In July 2015 the GLA estimated Brent had the lowest household mean income at ward level across London, (Stonebridge, £32, 250)<sup>230</sup>. In 2018 the Office for National Statistics estimated that residents median total weekly income in Brent to be £575, the second lowest out of the 33 London Boroughs<sup>231</sup>. There is a significant difference between the affordability

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<sup>223</sup> Opinion Research Services (2018) *London Borough of Brent Strategic Housing Market Assessment: Report of Findings*, London: s.n.p52

<sup>224</sup> Opinion Research Services (2018) *London Borough of Brent Strategic Housing Market Assessment: Report of Findings*, London: s.n.p51

<sup>225</sup> Savills PLC (2016) *Spotlight: Shared Ownership*, London: Savills PLC

<sup>226</sup> London Assembly Housing Committee (2015) *First Steps on the Ladder? An appraisal of Shared Ownership in London*, London: Greater London Authority

<sup>227</sup> Opinion Research Services (2018) *London Borough of Brent Strategic Housing Market Assessment: Report of Findings*, London: s.n.

<sup>228</sup> Greater London Authority (2017) *HOUSING IN LONDON: 2017 The evidence base for the Mayor's Housing Strategy*, London: Greater London Authority.

<sup>229</sup> Opinion Research Services (2016) *London Borough of Brent Strategic Housing Market Assessment: Report of Findings*, London: s.n.

<sup>230</sup> Greater London Authority (2015) *Household Income Estimates*, London: Greater London Authority. Available at: [https://data.london.gov.uk/apps\\_and\\_analysis/gla-household-income-estimates/](https://data.london.gov.uk/apps_and_analysis/gla-household-income-estimates/)

<sup>231</sup> Annual Survey of Hours and Earnings (ASHE) (2018) *Resident based median earnings (GBP) (Hourly and Weekly), by Full time/Part time, or Gender*, London: ASHE, ONS. Available at: <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/datasets/placeofresidencebylocalauthorityashetable8>

of social rent and other affordable discounted rents to local people in Brent, such that social rented housing is required to meet local housing needs. Government capital grants for social rent housing, however, fell dramatically, by approximately 60%, under the coalition government in 2010 and has not returned to previous levels. New affordable rented housing at up to 80% of market rents (inclusive of service charges) has provided some new supply, however the Brent 2018 SHMA outlined affordable rent properties in Brent set at 80% of market rents are unaffordable to anyone other than relatively high earning households, marginalising many in the borough<sup>232</sup>. With the introduction of the Overall Benefits Cap, the GLA and the Council have sought to cap new affordable rents at Local Housing Allowance levels.

Moreover, tenure mix of properties built in the borough is not in line with affordable housing targets. For example although in 2014/15 of the 1557 homes completed, 707 were affordable, 45% of total housing delivery; in comparison, in 2016/17 housing completion delivery decreased to 1306 additional units, with only 281 being affordable, 28% of total delivered; furthermore, in 2017/18, there was a dramatic decline in total units completed, reducing to 693 additional units, with 110 affordable – equating to 15.87%<sup>233</sup>. These more recent figures are less than both the 50% target by Brent and the 35% viability threshold<sup>234</sup>. Restrictions within existing legislation permits developments with less than ten units to not have any affordable obligations, also permitted development sites are limiting the percentage of affordable housing delivered in Brent to around 25%<sup>235</sup>. Brent is mirroring London in affordable delivery with the GLA finding the number of affordable homes delivered in London dropped sharply in 2015/16 to 5,790 which is the lowest figure in 25 years. In 2016/17 there was a 20% increase on this, reaching 6,960<sup>236</sup>.

### **Trend 3: Increasing Unaffordability**

Housing demand is outweighing supply which is having a knock on effect on affordability. At the same time, the affordability of shared ownership, low cost home ownership schemes and affordable rent programmes is being questioned. In 2015, whilst the median London wage was £28,000; the median household income for new shared owners across London was £39,300 in 2013/14<sup>237</sup>. Furthermore, there is a lack of ability to purchase more of your property within shared ownership (known as 'stair casing') leading to many individuals staying at the percentage they first buy at<sup>238</sup>.

The disparity between wages and housing costs has been happening across the UK and is projected to continue. Figure 117 shows how the percentage of annual wage has been decreasing over time in comparison to the increases in House prices.

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<sup>232</sup> Opinion Research Services (2018) *London Borough of Brent Strategic Housing Market Assessment: Report of Findings*, London: s.n.

<sup>233</sup> Brent Council (2017) *Authority Annual Monitoring Report & Housing Trajectory: 2017/2018*, London: Brent Council

<sup>234</sup> Ibid

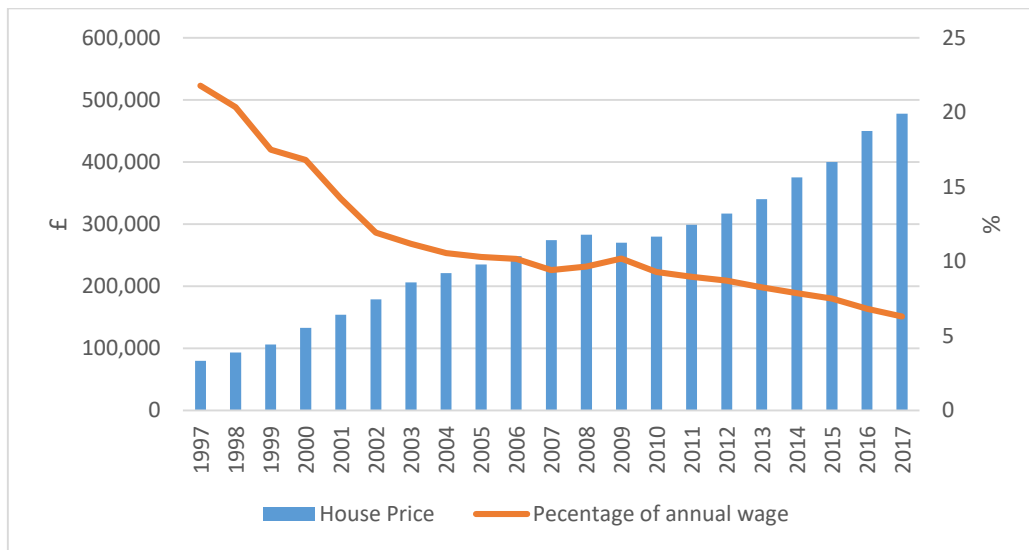
<sup>235</sup> Brent Council (2018) *Shaping Brent's Future Together, Local Plan Issues and Options: Regulation 18 Consultation*, London: Brent Council

<sup>236</sup> Greater London Authority (2018) *HOUSING IN LONDON: 2018 The evidence base for the Mayor's Housing Strategy*, London: Greater London Authority.

<sup>237</sup> London Assembly Housing Committee (2015) *First Steps on the Ladder? An appraisal of Shared Ownership in London*, London: Greater London Authority

<sup>238</sup> Ibid

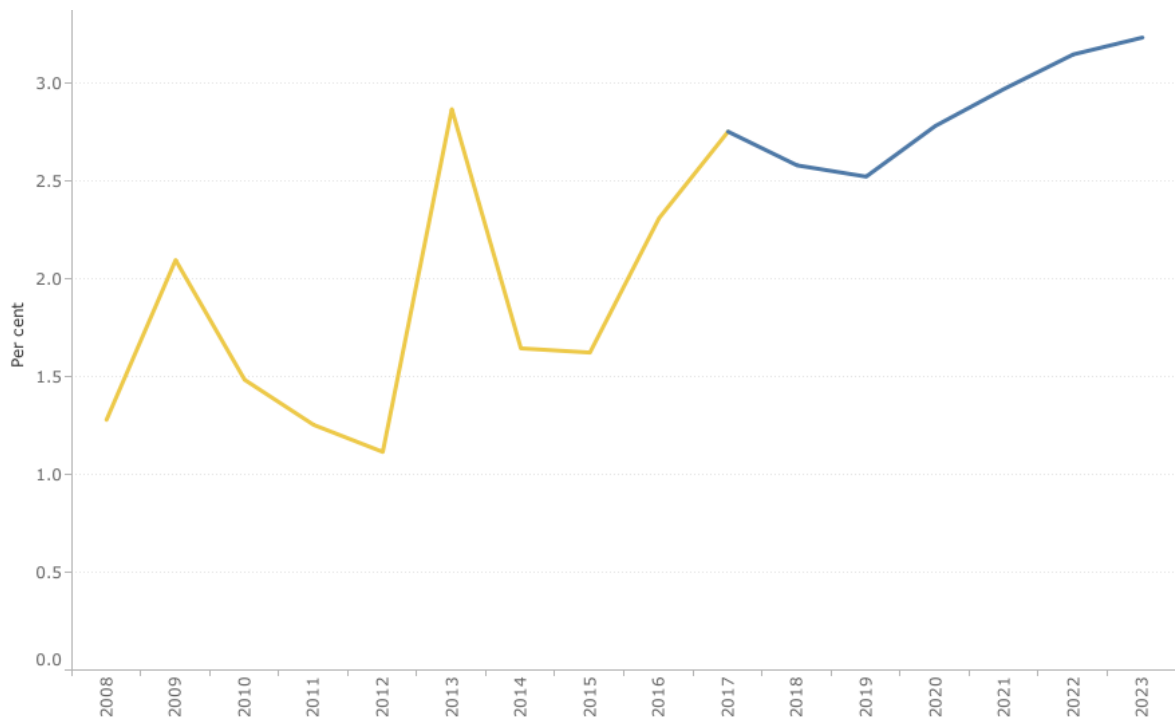
**Figure 117: Changes in House Prices and % of annual wage 1997-2017**



Source: ONS: Ratio of house price to workplace-based earning 1997-2017.

In relation to house prices, wages have not risen at the same rate. The median annual wage in 2017 covered 6% of the cost of a house compared to 21% in 1997. The annual wage in 2017 covered 6% of the cost of a house, compared to 21% in 1997. Forecasts show that this trend is likely to continue. Wage growth is projected to be 3.1% in 2022, in comparison rental prices will increase by 18% and house prices by 10% between 2019 and 2023.<sup>239</sup>

**Figure 118: Average Earnings Growth %**



Source: Office for Budget Responsibility

<sup>239</sup> CBRE Residential (2019) *Five Year Forecasts*, London: CBRE. Available at: <https://www.cbreresidential.com/uk/en-GB/content/five-year-forecasts>

There is a clear and established trend that housing costs are outstripping wages at a high rate.

One outcome of unaffordability is that Key Workers are unable to afford decent accommodation. Keyworkers are public sector employees who provide a vital frontline service in areas of health, education and community safety. A 2016 report by the London Chamber of Commerce and Industry (LCCI) found that 54% of “blue light” emergency service staff (police, ambulance staff and paramedics) now live outside London<sup>240</sup>.

London Councils’ research found that London senior leaders identified staff recruitment as one of the major issues facing schools in London, with 71% of London Primary school respondents stating recruiting classroom teachers is much harder, compared to 52% outside of London. Moreover, 94% of London school leaders agree that local house prices make it very difficult for teachers to continue teaching in London<sup>241</sup>. Wage freezes in the public sector and increasing housing costs mean that this is likely to continue to be a key issue.

Social housing lettings to new tenants in England declined from 364,000 per year to 212,000 per year between 1995/6 to 2014/15<sup>242</sup>. This means that an increasing number of low income households must now find a private tenancy. However increased competition for private rentals means landlords and letting agents can be more discerning about who their tenants are, favouring ‘young professionals’ who are considered ‘good tenants’. A 2016 survey of private landlords by Shelter’s found that 63% of landlords would prefer not to let to LHA claimants, with 42% operating an outright bar. Further, Shelter’s survey of private renters revealed that more than a fifth (21%) of those claiming housing benefit said they had been discriminated against because of their LHA status in the last five years<sup>243</sup>. As demand in the private sector increases, it will become harder for LHA claimants to find affordable housing in the private rented sector.

There has also been sustained increases in social rents within Brent, partly driven by the introduction of new affordable rents, from both the Council as well as Private Registered Providers (Figure 234 & 235). Whilst this increase is in line with neighbouring boroughs of Camden and Barnet, it highlights issues surrounding affordability for those at the very bottom of the housing market.

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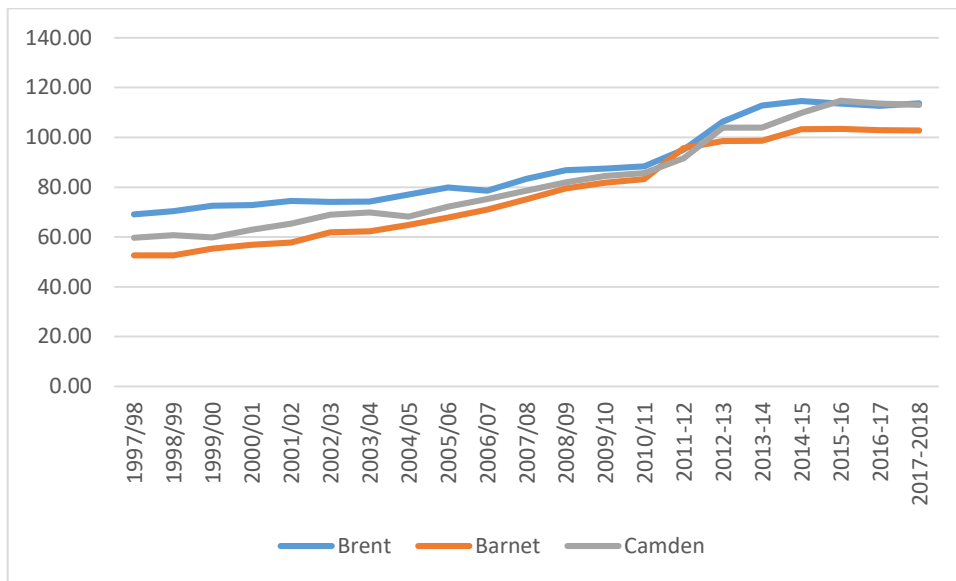
<sup>240</sup> London Chamber of Commerce and Industry (2016) *Living on the edge: Housing London’s Blue Light Emergency Services*, London

<sup>241</sup> London Councils (2017) *Talking Heads: The views of London’s school leaders on future challenges*

<sup>242</sup> Shelter (2017) *Shut out: The barriers low income households face in private renting*, London: Shelter

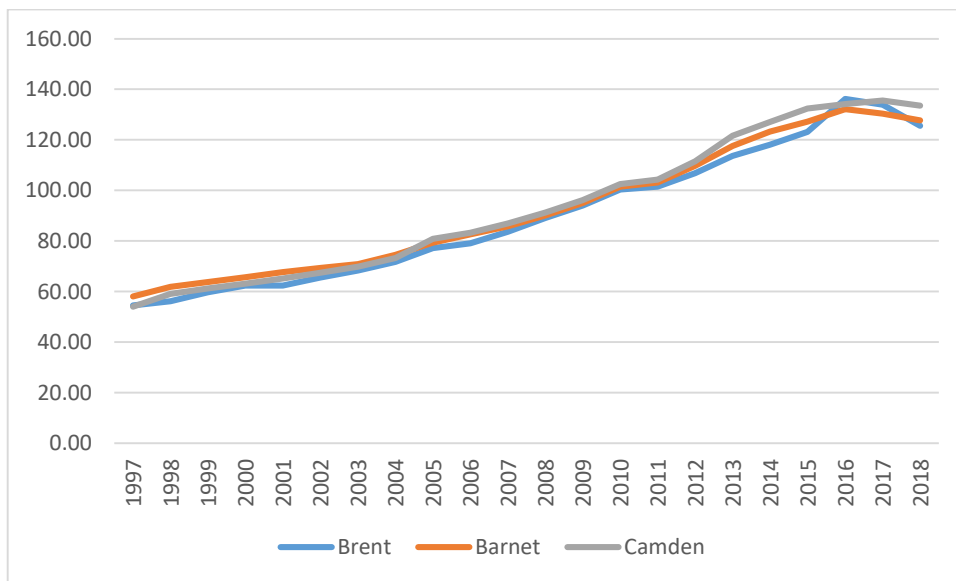
<sup>243</sup> Shelter (2017) *Shut out: The barriers low income households face in private renting*, London: Shelter

**Figure 119: Local Authority Average Weekly social rents 1997 – 2018**



Source: DCLG, Table 702: January 2019

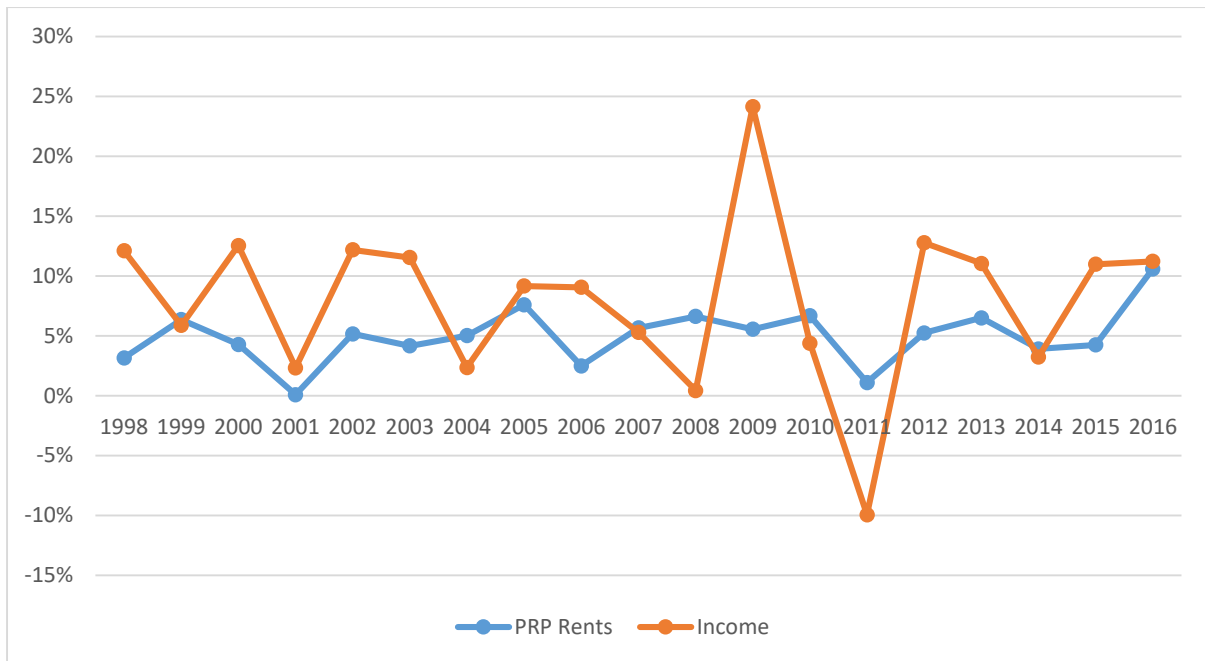
**Figure 120: Registered Social Landlord weekly rents**



Source: DCLG Table 704: January 2019

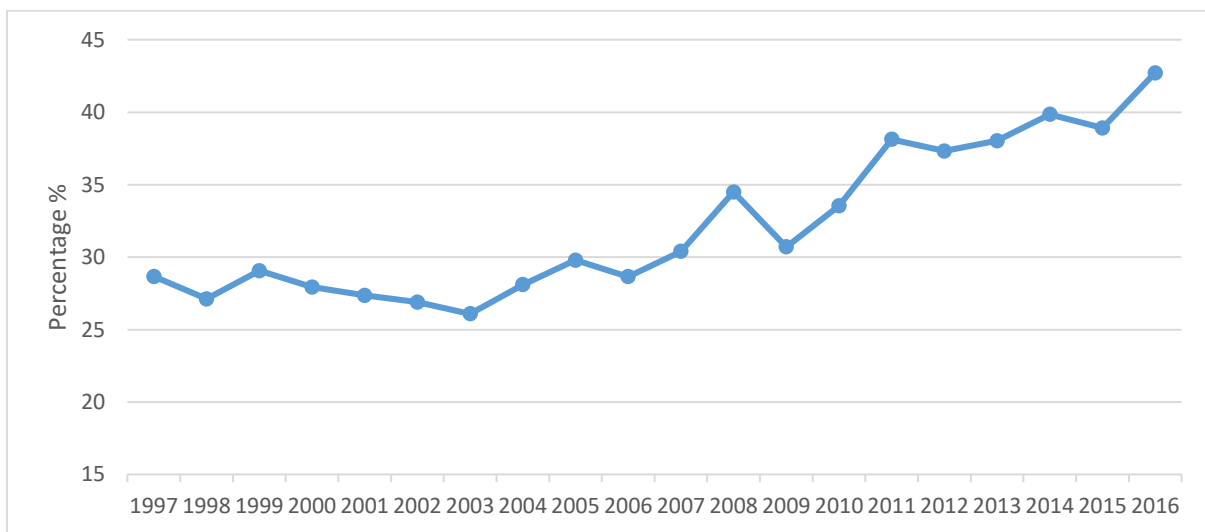
Whilst social rents have been increasing, the tenth percentile gross weekly salary in Brent (the percentile in which most individuals within socially rented properties are) has not increased at the same rate. Whilst Private Registered Provider average weekly rents have increased by circa 150% from 1997 to 2016, in the same period, gross weekly salary has increased by only 68% (Figure 121). The ONS estimates that in Brent, the average weekly social housing rent for PRP makes up 42.71% of tenth percentile gross weekly salary in Brent, an increase of around 14% from 10 years previous (Figure 122) The continued increase in social rents, combined with the lack of supply meeting demand could lead to an increase in overcrowding and reduction in quality and suitability of housing.

**Figure 121: Comparative percentage change in PRP social rents to 10th percentile weekly income 1997 to 2016**



Source: ONS Housing Summary Measures: 2017

**Figure 122: Average weekly social housing rent for private registered providers as a percentage of tenth percentile gross weekly salary, 1997 to 2016**



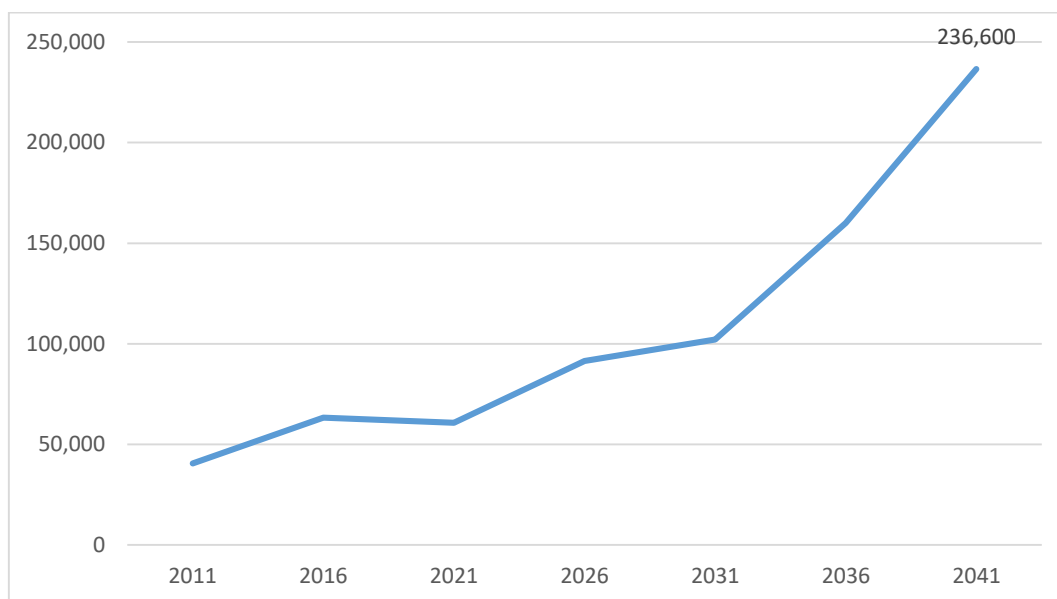
Source: ONS Housing Summary Measures: 2017

Increased homelessness is another outcome of increased unaffordability. The welfare cuts introduced in this decade, and those planned for introduction in the coming years will cumulatively reduce the incomes of poor households in and out of work by some £25 billion a year by 2020/21. Homelessness is projected to increase between now and 2041<sup>244</sup>. In Greater London, homeless households are projected to reach nearly a quarter of a million people by

<sup>244</sup> Fitzpatrick, S., Pawson, H., Bramley, G. & Wilcox, S. (2017) *The homelessness monitor: England 2017*, London: Crisis

2041, almost 4 times the number in 2016 (Fig. 123); increasing at a faster rate than levels across England, Wales and Scotland.

**Figure 123: Projection of Number of Homeless Households in Greater London**



Source: Homelessness projections: Core homelessness in Great Britain 2017

Fuel poverty (the inability to adequately heat a home) is another impact of unaffordability as it is caused by both low incomes and high costs. Fuel poverty is more common amongst ethnic minority groups with 16.4% living in fuel poverty in comparison of 10.4% of the white population in the UK in 2015. 37.6% of all fuel-poor households are in the private rental sector. In Brent, 13.1% of households experienced fuel poverty, higher than London at 10.1% and England at 11%. This is in the context of existing welfare cuts, economic trends and higher housing costs associated with the growth of private renting have already increased poverty amongst members of working families to record levels.

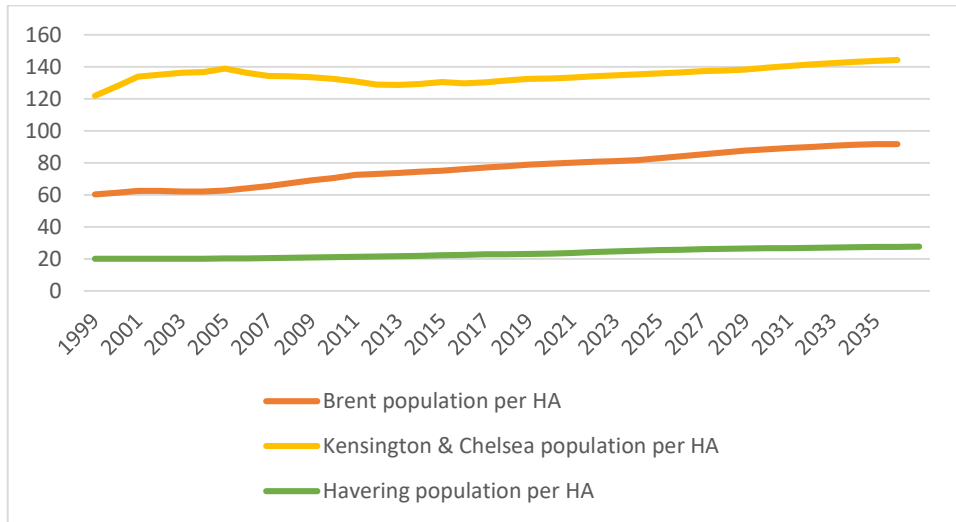
#### **Trend 4: The need for increased densification**

Given London's scarce land supply and competing demands for land use, including demand for new homes to accommodate London's growing population, it is vital that higher density is achieved. The ONS anticipate population per HA in Brent to increase by 50% from data in 2000 by 2039, around an 19% increase from 2019 levels. Brent's density is in the mid-range of all London Borough's, far higher than Havering (where half of all land is green space) but almost half the density of Kensington & Chelsea (Figure 124). Inner London densities are higher compared to outer London boroughs and the Greater London average, however they are relatively low compared to some European capitals. The Department de Paris has a population density of 213 per HA and whilst Madrid's Centro district has a population density of 286 per HA<sup>245</sup>. Going forward maximising density will be integral to housing delivery.

<sup>245</sup> London First, Savills PLC (2015) Redefining Density: Making the best use of London's land to build more and better homes, London: Greater London Authority.



**Figure 124: Population density per HA**

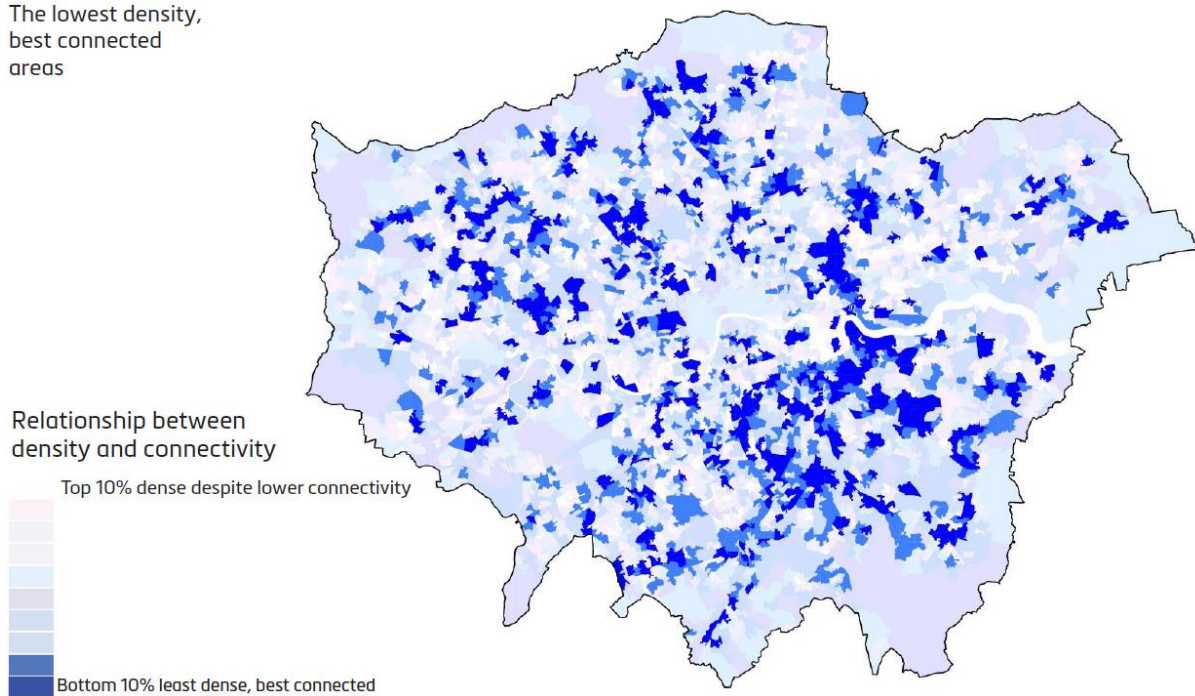


Source: GLA: March 2018

Observed density of development across London is the output of a broader range of factors such as transport connectivity, the location and characteristics of the site and social infrastructure requirements (Figure 125). Ensuring these factors are properly balanced and, in particular, that new homes (including new homes in mixed-use development) are well-designed and of a high-quality, allows for higher densities to be achieved. The GLA report on redefining density shows us the opportunities if connected areas with a low housing density were to match the density of similarly connected but higher density areas, this would – in principle – create approximately 1.4 million new homes across London. This is around 1 million more new homes than the current 10 year London Plan house building target.

**Figure 125: Relationship between density and connectivity map in London**

The lowest density, best connected areas



Source: Savills analysis from Redefining Density

Brent Council has established growth areas where new housing, commercial and office space will be developed, as well as, new transport connections. The 5 established growth areas in Brent are Wembley, Alperton, Church End, Burnt Oak & Colindale and South Kilburn. In the Local Plan Preferred Options, 3 new growth areas have been identified in Northwick Park, Neasden Station and Staples Corner. All established and emerging growth areas are anticipated to accommodate increased levels of housing density.

Moreover, GLA's current housing strategy outlines the importance of higher density homes across the city, including in outer London<sup>246</sup>. To accommodate a growing need for densification in London, new areas for development have to be identified, with sufficient supporting infrastructure and connectivity to ensure development is sustainable. Two ways that have been identified by the GLA are through Opportunity Areas (or growth areas) and the better utilisation of Town Centres and High Streets. Design will also place a crucial role to maximising density with London. Often there is an association between increasing density and high-rise buildings. Whilst high-rise buildings do have a place in certain areas where they fit in with the landscape, they are not the only solution. For outer-boroughs, like Brent, mix of mid-rise buildings, mansion blocks and terraced housing along more traditional street patterns will help increase density and make efficient use of land<sup>247</sup>. The Draft London Plan (2017) sets out new density targets for developments to make sure it has optimal capacity.

### **Trend 5: Maximising land use through mixed use development**

Lifestyle changes such as, working from home, the need for smaller spaces (due to young people living by themselves and not having children) as well as the need of proximity to basic infrastructure and services, leads to new housing typologies. The population growth anticipated in London over the coming year's demands additional homes however an additional requirement will be the need for additional office and employment space. Some projections state the growing number of employees in London will require an additional 20m sq. ft. of office space over the next five years – the equivalent of increasing the City of London by 25%<sup>248</sup>. Increasingly developers are proposing mixed use development, combining residential, infrastructure and commercial uses, to make better use of the land. Mixed use developments can range from a single building to an entire neighbourhood, and are typically developed to be responsive to a specific environment. Mixed use developments are able to adapt to changing lifestyles and needs of and within London, improving employment infrastructure opportunities as well as increasing access to necessary amenities all within close proximity. Planning for mixed-use developments in all parts of London will spread the success of London's economy and create stronger communities.

Current growth in Brent has showed the demand for mixed use development in its 5 established growth areas and 3 emerging growth areas (Figure 126). The Core Strategy, 2010 and the Wembley Area Action plan outlined the initial concentration of regeneration in Wembley, with the overarching aim of transforming the Wembley Link area into a sustainable mixed use community. The transformation of Wembley provides evidence to the growing trend towards the benefits of mixed use developments, with Wembley Park having constructed 7,000 new homes and more than 8,640 new jobs (excluding those within construction)

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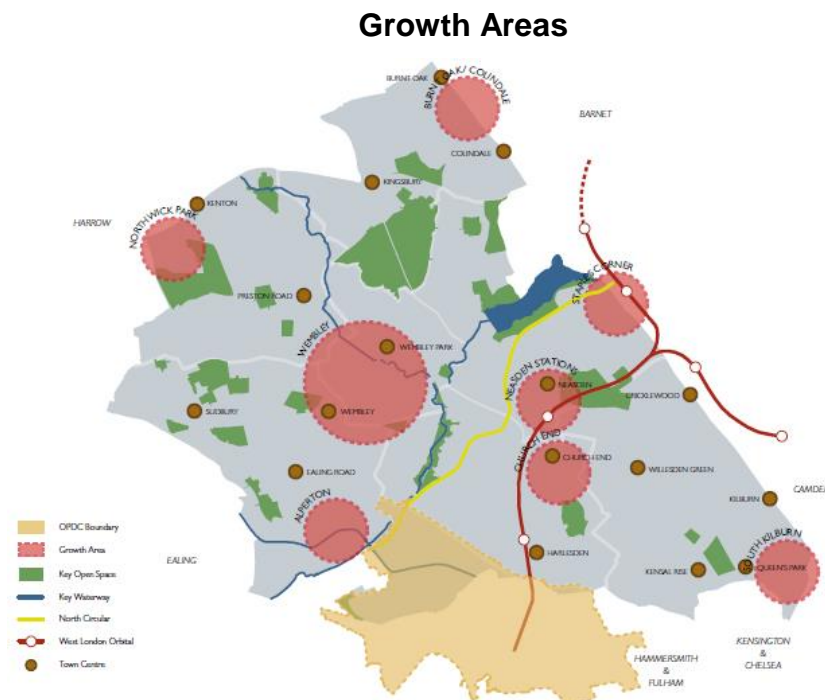
<sup>246</sup> Greater London Authority (2017) *London Housing Strategy: Draft for Public Consultation*, London: Greater London Authority

<sup>247</sup> London First, Savills PLC (2015) *Redefining Density: Making the best use of London's land to build more and better homes*, London: Greater London Authority.

<sup>248</sup> Savills PLC (2016) *Spotlight: London Mixed Use Development*, London: Savills PLC

created<sup>249</sup>. Mixed use development is being utilised in all of Brent's current growth areas and in estate regeneration, with South Kilburn expected to deliver 2,400 additional homes (including 1,200 for social tenants) as well as new retail, leisure, education and health facilities<sup>250</sup>. The benefits mixed use developments bring will continue to make them at the forefront of regeneration programmes.

**Figure 126: Growth areas in Brent**



Source: Brent Local Plan Preferred Options, 2018

Vacant industrial land has been identified for both mixed-use development, residential development and office and retail space in London. The London Plan (2011) set policies that adopted a rigorous approach to industrial land management including the transfer of surplus industrial land to other uses, especially housing. Alongside this the GLA Supplementary Planning Guidance set benchmarks for the release of industrial land for non-industrial uses<sup>251</sup>. However past trends in industrial land release show an accelerated rate of release significantly above these benchmarks. The trend rate of release for 2010 to 2015 was 105ha per annum, compared with the SPG recommended rate of release of 37ha per annum. The GLA have anticipated that if these trends continue then the total stock of industrial land in London will decline by 33% from 2015 to 2014; from around 6,980ha in 2015 to around 4,700ha by 2041<sup>252</sup> (Figure 127).

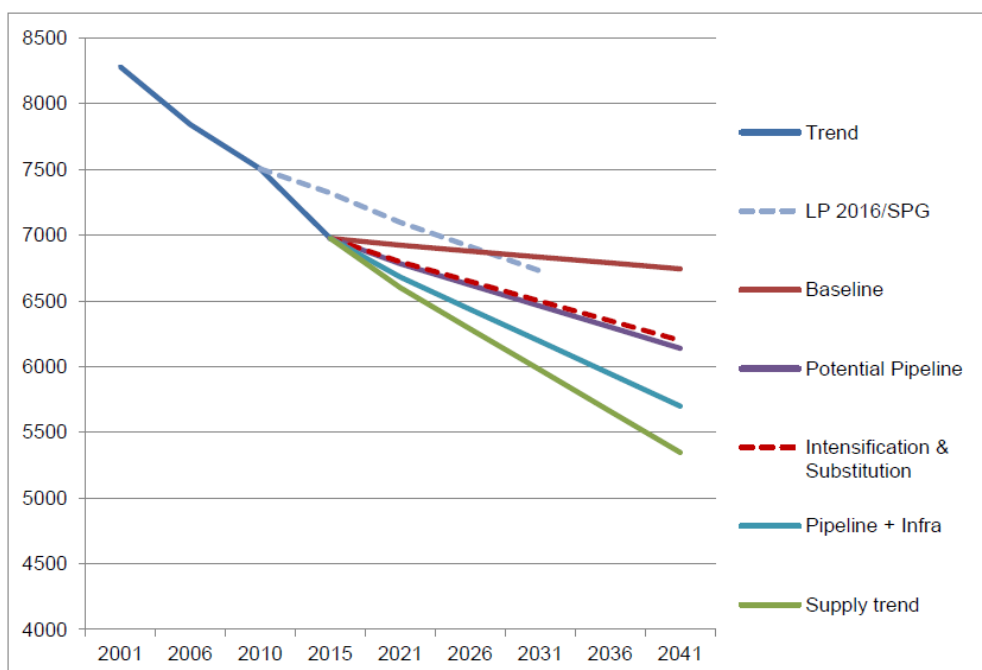
<sup>249</sup> Quintain (2018) Wembley Park. Available at: <http://www.quintain.co.uk/wembley-park>

<sup>250</sup> Brent Council (2016) South Kilburn Masterplan Review, London: Brent Council

<sup>251</sup> Greater London Authority (2012) *Land for industry and Transport: Supplementary Planning Guidance*, London: Greater London Authority

<sup>252</sup> Greater London Authority (2016) *London Industrial Land Supply and Economy Study*, London: Greater London Authority

**Figure 127: Trend in total stock of industrial Land and industrial land release scenarios (ha) 2016-2041**



Source: London Industrial Land Demand – CAG Consultants

There is now a strong policy response that if more industrial and employment land is to be released moving forward, then there must be greater co-location and closer adjacency of residential and employment use, which is something planning has previously sought to separate in London. The Draft London Plan (2017) outlined the relaxation of restrictions on Strategic Industrial Locations (SIL) and Local Significant Industrial Sites (LSIS) (formerly protected for industrial land use) to allow intensification, co-location and substitution moving forward. The Draft London Plan (2017) indicates development plans and local plans should facilitate best use of SIL and LSIS to offer residential, industrial and other non-industrial use<sup>253</sup>. In 2015 Old Oak and Park Royal Development Corporation was launched as the major regeneration project in West London – significant to Brent as Park Royal is a strategic industrial location. The regeneration programme incorporates intensification, co-location and substitution and aims to create a new urban neighbourhood at Old Oak, supporting a minimum of 24,000 new homes and an additional 1,500 in non-industrial locations in Park Royal; support the creation of 55,000 new jobs at Old Oak and a further 10,000 at Park Royal; protect and enhance Park Royal as a strategic industrial location<sup>254</sup>.

Wembley, Neasden and Church End are identified as central growth areas within the borough, planned for concentration and co-location of new office, commercial, industrial and residential development. Intensification of these areas would capitalise on key assets and infrastructure, including the proposed West London Orbital line, and build on existing plans for investment, development, accessibility and branding.

<sup>253</sup> Greater London Authority (2017) The London Plan: The spatial development strategy for Greater London, Draft for public consultation, London: Greater London Authority

<sup>254</sup> Old Oak and Park Royal Development Corporation (2017) *OPDC Local Plan: Revised draft for Regulation 19 Consultation*, London: Old Oak and Park Royal Development Corporation

## **Trend 6: Increased use of Town Centres and High Streets for Housing delivery**

Nearly every person in Brent lives half a mile from a high street. They form the heart of the borough, with great diversity and character (Figure 128) have become opportunity areas for not only vibrant commercial and office space but for housing as well. Due to their centrality and connectivity to the rest of the borough High Street demand for housing will continue to grow. The Draft London Plan (2017) highlights the growing importance of Town Centres laying out their unique position to support the clustering effect of businesses known as ‘agglomeration’<sup>255</sup>. However, with the growth of online retail markets and out of town retail centres, town centres have an increasingly difficult market to generate income and stay vibrant attractions in our towns, despite their often good transport links. The Draft London Plan (2017) identifies that Town Centres will need to adapt to these challenges which includes becoming locations for housing development. The London Strategic Housing Land Availability Assessment supports this notion and identified Town Centres to be able to deliver 3,369 large sites with the capacity for 155,137 new dwellings from 2015 to 2025, the equivalent of 15,500 homes per annum<sup>256</sup>. Within their assessment, Cricklewood and Wembley as two key areas in which Town Centre development could be utilised – delivering 4,200 and 4,810 homes respectively. Brent Council have identified nine high streets for development including Harlesden, Kilburn High Road, Church End, Neasden, Burnt Oak, Colindale/The Hyde and Willesden with a key area of focus being to accommodate future housing needs and growth<sup>257</sup>. The centrality of Town Centres will continue to make them an ever-increasing attractive area for residential development, helping to increase housing supply but also revitalise high streets in challenging environments.

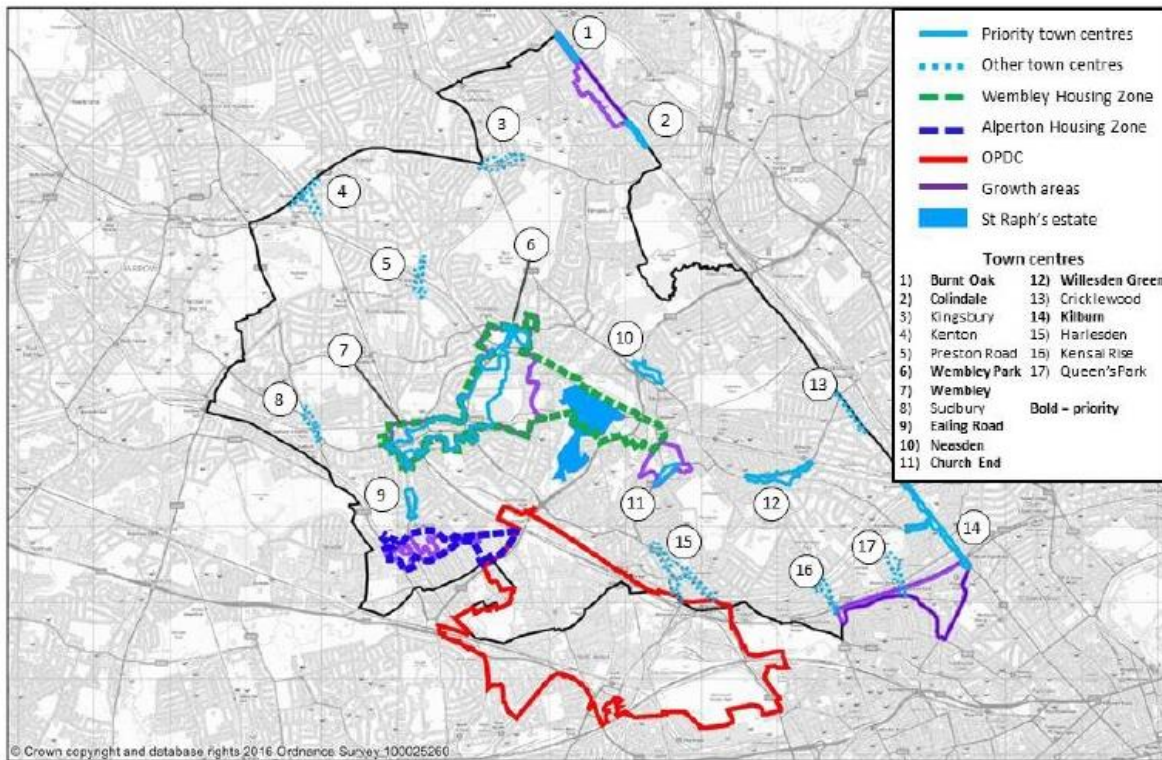
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<sup>255</sup> Greater London Authority (2017) The London Plan: The spatial development strategy for Greater London, Draft for public consultation, London: Greater London Authority

<sup>256</sup> Greater London Authority (2014) Accommodating Growth in Town Centres, London: Greater London Authority

<sup>257</sup> Brent Council (2017) Cabinet Report: Town Centres Action and Investment Plan, London: Brent Council

**Figure 128: Brent's High Streets and Town Centres**



Source: Brent GIS Mapping: 2017

### **Trend 7: Increase of the Private Rented Sector (PRS)**

Deregulation of private rents from the 1980s has driven the costs for tenants in the private rented sector over time, and also had a feedthrough effect on social rent levels which are set in part with reference to prevailing market conditions.

London's Private Rented Sector (PRS) has doubled in just over a decade and continues to rise, with private renters projected at 40% of London's households by 2025<sup>258</sup>. There are a variety of policy responses and demographic trends which show that the PRS will grow and become an even bigger part of the housing market. The vast majority of homes in the private rented sector are owned by small scale, amateur landlords which allows for disparity in renting experience<sup>259</sup>. However large scale 'Build to Rent' developments have increased significantly in the last couple of years and are now driving the growth in the private rented sector<sup>260</sup>. Build to rent is not a new product in London – institutional investors owned mansion blocks in central London in the 60s & 70s, but due to increasing controls on rent, most of these were sold off. Europe and North America have well established build to rent sectors that house a wide variety of household types<sup>261</sup>. Build to Rent is therefore an effective way to deliver a mix of housing for a variety of households.

<sup>258</sup> Future of London (2017) *Engaging London's Private Rented Sector*, London: Future of London

<sup>259</sup> London Councils, London First, Turley (2017) *Everything you need to know about build to rent in London*, London: London Councils, London First, Turley

<sup>260</sup> Ibid

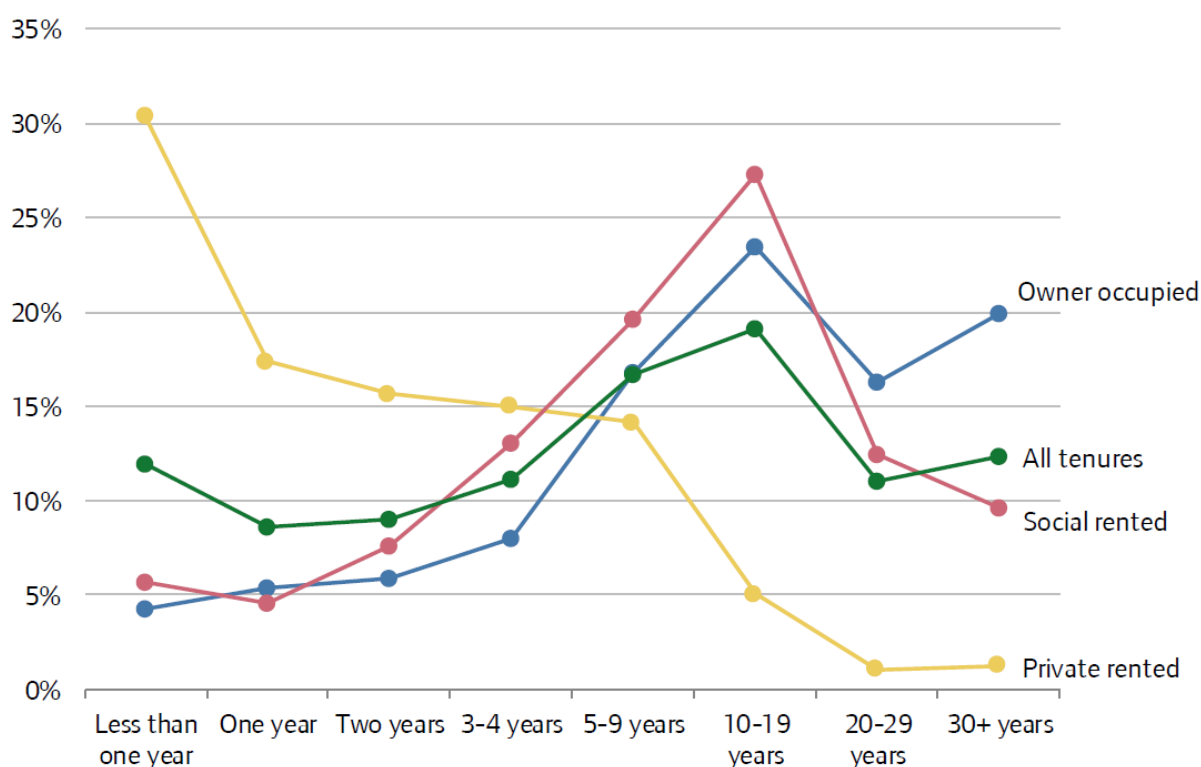
<sup>261</sup> Ibid

## Build to Rent (BTR)

Just as in London, Brent has started to take advantage of the emerging purpose-built private rental sector or Build to Rent (BTR) to help increase housing delivering while keeping housing units affordable. BTR can also support the development of new tenure typologies for private renters and help relieve a housing market that relies largely on build for sale-led developments. BTR decreases the waiting period for housing delivery as they have a broader demand – demand for renting is higher than for new build sale<sup>262</sup>. As of 2016, just over 10,000 build to rent homes had been built, with another 9,500 under construction. In 2017 Quintain, the developers leading house building in Wembley, announced plans to develop 5000 PRS homes around Wembley Stadium, becoming the largest build to rent site in the UK<sup>263</sup>.

The specialist Build to Rent company Tipi – Quintain’s rental company – have introduced a new kind of housing concept. The focus of the new management company is to take the hassle out of renting by including all utility bills in the rent and to provide an offering that is flexible, with no agent or end of tenancy fees to pay. The flexibility will also reflect the trend towards shorter tenancy periods as the GLA estimate that one in eight London households and one in three private renters have lived in their current home for less than a year (Figure 129)<sup>264</sup>

**Figure 129: Length of time in current home by tenure, London**



Source: GLA Housing in London: 2018

<sup>262</sup> Greater London Authority (2017) HOUSING IN LONDON: 2017 The evidence base for the Mayor’s Housing Strategy, London: Greater London Authority.

<sup>263</sup> Quintain (2017) *Wembley Park set to become the largest build to rent development site in the UK* (Published 7<sup>th</sup> February 2017) Available at: <http://www.quintain.co.uk/news-and-media/press-releases/2017/07-02-2017>

<sup>264</sup> Greater London Authority (2017) HOUSING IN LONDON: 2017 The evidence base for the Mayor’s Housing Strategy, London: Greater London Authority.

The Tipi model will accommodate the increased level of mobility within London which allows flexibility for individuals within the private rented sector but also focuses on improving the quality of supply including assurances surrounding security of tenancy. Brent Council recognises a need to focus on improving the quality and security of the private rented sector and, alongside plans and commitments made by the London Mayor. The Mayor wants to further encourage institutional investors to make private renting better for tenants<sup>265</sup>. The focus on the development of the quality and security of the private rented sector will continue to grow as PwC estimated in 2016 that a 20-39 year old on average income who was looking to buy their first home would need 19 years to save the £115,000 (average deposit required to buy a property in 2035) without having any additional funds from other sources<sup>266</sup>. Also Brent's changing pattern of diversity is an important factor. For example, the White Other group has grown, mainly as a result of inward migration from Eastern Europe, with the private rented sector the main source of housing<sup>267</sup>.

The Government and the Mayor of London are pressing for further investment in the BTR sector. The BTR fund was set up from 2012 to 2016, which is now incorporated in to the wider Home Building Fund. The Housing SPG (2017) and Draft London Plan (2017) understands the need to look at BTR differently from traditional developments and sets alternative planning guidance through five principles in the BTR pathway. BTR is key in delivering affordable housing and the pathway includes guidance on affordable housing delivery in which affordable homes are kept under single management to encourage discounted market rent, preferably at London Living Rent levels<sup>268</sup>.

BTR is however not a silver bullet to the housing crisis as the impacts of 'Generation Rent' are becoming apparent. PwC project that by 2025 an additional 1.8 million households will be in PRS, amounting to a total of 7.2 million or about 1 in 4 households, with the majority of renters being in the 20 – 39 age bracket<sup>269</sup>. Projections by Scottish Widow indicate that one in eight retirees, equating to over 1 million people, will be living in rental accommodation in 15 years and crucially 67% of renters aged 50 – 64 who plan to rent in retirement say they have no plans to increase their pension contributions<sup>270</sup>. At the same time the proportion of retiree income spent on rent is projected to significantly increase, particularly in London (Figure 130). The widening gap in income and rent for an increasing number of retiree renters' leads many to believe there will be an increase reliance on state intervention.

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<sup>265</sup> Brent Council (2018) Shaping Brent's Future Together, Local Plan Issues and Options: Regulation 18 Consultation, London: Brent Council

<sup>266</sup> PwC (2016) 3 – UK Housing market outlook: the continuing rise of Generation Rent, London: PwC

<sup>267</sup> Brent Council (2018) CMT Report: Housing Supply and Affordability, London: Brent Council

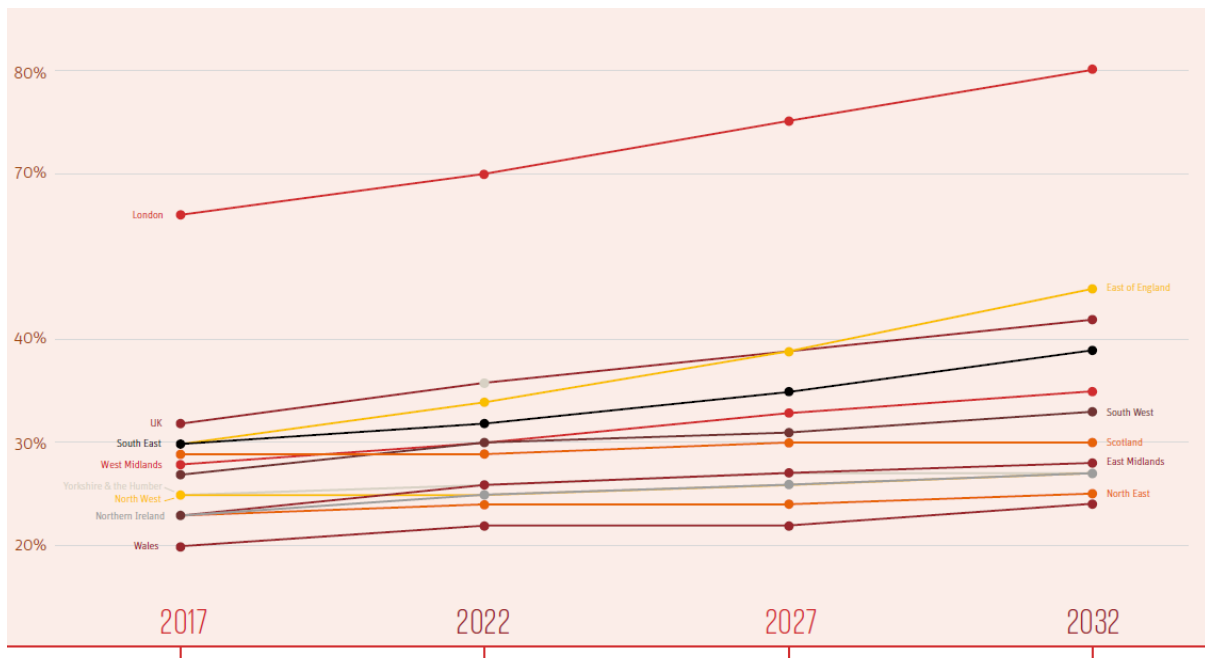
<sup>268</sup> Greater London Authority (2017) Homes for Londoners: Affordable housing and supplementary planning guidance, London: Greater London Authority

<sup>269</sup> PwC (2016) 3 – UK Housing market outlook: the continuing rise of Generation Rent, London: PwC

<sup>270</sup> Scottish Widows (2017) Retirement Report 2017 – Renters in Retirement, UK: Scottish Widows



**Figure 130: Proportion of Pensions income spent on rental payments**



Source: Retirement Report 2017, Scottish Widows

Greater access to affordable homes, routes into home ownership and mobility between tenures need to be encouraged to counter-balance the risks associated with an increased dependence on PRS.

## Responses

Brent must make important policy changes if it is to meet housing demand over the next 20 years. Following the Mayor's Housing Strategy; Registered Providers, Local Authorities, institutional investors, and small builders will all need to play a far greater role if a step change in housing delivery is to be realised.

### Response 1: Change in Demographic Structure and Household Mix

Brent will have to deal with a shifting age population and new housing typologies should be studied and developed. Brent's NAIL programme should continue and expand its stock to provide proper housing options for the ageing and elderly population. This is important as the built environment has a huge impact on the experience of ageing.

The Build to Rent industry, which targets younger professional sharers, could create new designs for older people. These could be for couples looking to downsize, or single people. These places could look to address issues faced by older people by for example creating communal spaces that help prevent social isolation<sup>271</sup>.

There are increasing numbers of multigenerational households in the UK. Multigenerational living is when there are three or more generations of the same family living together, or where there are two generations consisting of parents and one or more adult children. To date, multigenerational living in the UK has mainly been driven by a lack of affordable family homes and has mostly been informal. Multigenerational living is also used as solution for ageing relatives needing support. There are some examples of purpose built intergenerational housing in Europe where similar issues are faced in relation to housing: young people struggle to afford housing and isolation and loneliness are affecting quality of life for older people. Intergenerational housing solutions are emerging as symbiotic, mutually beneficial, solutions to these issues.

In Alicante, Spain a scheme has provided 244 affordable, intergenerational housing units in central urban areas. The project, which started in 2003, is run by the Municipal Project for Intergenerational Housing and Community Services. Alicante's intergenerational model has been successful in allowing older residents to remain in their homes in later life. It aims to address the housing problems of low-income old and young people. The young people spend a few hours per week with four older people, liaising with the facilities management team if additional help is needed. The young people are selected based on income and their suitability for the social programme. The project was shortlisted for the Building and Social Housing Foundation's World Habitat Awards in 2012<sup>272</sup>.

Other similar schemes have taken place in Deventer, Holland, students enjoy free board at Residential and Care Center Humanitas. The success of both schemes is their ability to provide clear benefits to both demographics. This boosts social interaction, while students share time and skills in exchange for low or free rent and access to facilities which would normally be outside their budgets.

Although the ageing population is a pressing issue, the majority of Brent's population in 2040 will be of working age. There will be an increased need to provide accommodation suitable for working professionals. An example, of a project that has tried to address this is The Big Blue

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<sup>271</sup> Future of London (2017) *Engaging London's Private Rented Sector*, London: Future of London

<sup>272</sup> Ibid

programme by Network Homes converted an IBM office complex to a 270-unit PRS development in Sudbury Hill, Harrow. It will offer studio, one-bedroom and two-bedroom homes, all at 80% discount market rents. GLA made a £20.8m loan through its London Housing Bank, an initiative set up in 2014, meaning the Big Blue is the first Build to Rent development to receive loan funding. The project is the first of Network Homes' SmartRent schemes, which aim to deliver well-connected, purpose-built homes for professionals. As the model relies on retaining tenants and minimising vacant units, eligibility criteria include a minimum salary (though also a ceiling of £90,000 per annum) and no history of rent arrears. Applicants must also live or work in London<sup>273</sup>.

Build to Rent Schemes can be used to ensure that homes are built with specific demographics in mind, having a clear vision of what the borough will need in 2040.

## Response 2: Demand & Supply Imbalance

As stated in the baseline, the construction and development of new housing and growth areas is in the hands of just a few companies, slowing down housing supply. Brent Council should encourage the diversification of the housebuilding industry, increasing the number of actors on the stage, including Registered Providers, small and medium sized builders, resident's self-building and the Local Authority itself.

Brent has already taken steps to diversify supply of temporary accommodation. The Temporary Accommodation reform plan adopted in 2016 outlined the Council's commitment to purchasing units in the private rented sector, i4B Holdings Limited was created to carry out this function and Brent Council being its sole shareholder. The Council should continue to invest in the acquisition of properties through i4B and offer guarantees of affordable rents for households that the Council has a responsibility to. This is particularly important because of the lack of supply of larger properties required for temporary housing.

The London Housing Strategy set out aims to encourage the diversification of the homebuilding industry, through the 'Small Sites, Small Builders' programme and other initiatives<sup>274</sup>. One way Brent Council could encourage this is by identifying small sites, land and assets suitable for development by small and medium sized homebuilders and housing associations to facilitate the delivery of additional homes for Brent. Brent Council could encourage small and medium sized homebuilders to access initiatives like Housing Growth Partnership which aims to provide small and medium sized homebuilders with much needed funding for new projects. The Council could also develop joint ventures with small and medium sized house builders on identified small sites. In 2017 Birmingham City Council launched a new programme to support small and medium-sized house builders. The 4-year programme will see small and medium sized house builders working for Birmingham City Council's housebuilding arm – Birmingham Municipal Housing Trust. The programme has been set up to make the most of the land sites available and to address the issue of small sites<sup>275</sup>. The schemes allow Birmingham City Council to work with smaller companies that are best placed

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<sup>273</sup> Network Homes (2018) *Network Homes to create 270 homes in first Build to Rent development on 'Big Blue' site*, Available at: <https://www.networkhomes.org.uk/news/latest-news/2017-news/network-homes-to-create-270-homes-in-first-build-to-rent-development-on-big-blue-site/>

<sup>274</sup> Mayor of London, London Assembly (2018) *Mayor launches small homebuilders scheme with TFL* (Published 6<sup>th</sup> February 2018) Available at: <https://www.london.gov.uk/press-releases/mayoral/mayor-launches-small-homebuilders-scheme-with-tfl>

<sup>275</sup> Local Authority Building & Maintenance (2017) *Birmingham City Council launches new programme to support small and medium-sized housebuilders* (Published 29<sup>th</sup> March 2017) Available at: <http://labmonline.co.uk/news/new-programme-supports-small-housebuilders/>

to build on smaller plots of land. The new system will see homes built on designated small sites of up to 15 houses.

A further step the council could take is setting up its own development company to support the building of homes. The London Borough of Croydon did this when they set up Brick by Brick Croydon Limited (BxB), with the council acting as sole shareholder. It aims to deliver high quality, new, residential-led development on a range of sites across the borough. As well as being able to make sure the borough fully benefits from land value uplift and development returns, Brick by Brick will be able to deliver directly and act quickly to new opportunities in the market place<sup>276</sup>.

The company was setup with loans taken from the council. The interest charged on loans made to BXB are projected to generate £17.7m for the Council. In addition, the company also covers the estimated £927k annual cost of the Council's in-house Development team (which all provide services to BXB). It also currently contributes an estimated £362k per annum to cover the costs of various services that it buys from the Council (such as accommodation, ICT, HR, etc.)<sup>277</sup>.

### **Response 3: Increasing Unaffordability**

#### Homelessness

The Homelessness Reduction Act 2017 (HRA) requires councils to provide homelessness assistance to any UK citizen or person with the right to reside. This was due to be implemented in April 2018 in preparation the Council has implemented the Single Homelessness Service and the Single Homelessness Prevention Service (SHPS) to support vulnerable adults in housing need<sup>278</sup>.

The London borough of Southwark has been piloting the act and the new approach has delivered positive effects. Numbers of households being put up in temporary homes have halved in a year, and the use of unsuitable and expensive bed and breakfast accommodation has been eliminated<sup>279</sup>. Other approaches to tackling forms of housing should also be explored. Project 99 a new Housing Scheme launched and will house 10 homeless young people by the New Horizon Youth Centre. The project is designed to overcome the problems that keep these young people trapped in homelessness, with no requirement for a deposit, affordable rent and acceptance for those in receipt of housing benefit. Included in this project is a year of targeted support at New Horizon Youth Centre for all residents, from emotional and mental health assistance to help with education and employment, giving them everything they need to begin living independently after their tenancy. In general, Shelter recommends that all Local Authorities should consult with an expert panel of people with personal experience of seeking homelessness assistance in their area when planning how to implement their new duties<sup>280</sup>.

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<sup>276</sup> BXB Development (2018) Available at: <http://www.bxbdevelopment.com/>

<sup>277</sup> London Borough of Croydon (2016) *New homes for Croydon: Frequently asked questions*, London: London Borough of Croydon

<sup>278</sup> Brent Council (2018) *Equalities Committee: Homelessness Reduction Act: Equality Impact Analysis*, London: Brent Council

<sup>279</sup> Southwark Council News

<sup>280</sup> Shelter (2017) What service users need from assessments and personalised housing plans – Homelessness Reduction Act, London: Shelter

## Access to PRS for LHA claimants

To approach the barriers young, single LHA claimants have in accessing the private rented sector Brent Council should improve the awareness of welfare policy and reform with private landlords. One way The London Borough of Croydon has done this is through working with private landlords directly. London Borough of Croydon has established, through tender, a panel of eight private sector landlords that will act as managing agents for houses in multiple occupation, for placement of homeless households. The private sector landlords will spread the word about the scheme – the guarantee of income and expected standards – and bring forward suitable properties. The Council have implemented a monitoring system to ensure performance<sup>281</sup>.

## Fuel Poverty

Tackling fuel poverty is another way to help reduce unaffordability in Brent. Action on fuel poverty can improve people's lives while helping to reduce demands on public spending. Households living in or on the brink of fuel poverty often face very difficult trade-offs between meeting their fuel bills, spending on other essentials such as food and falling into debt, all of which can exacerbate physical and mental health problems.

One way some Local Authorities have been tackling fuel poverty is through setting up council run energy suppliers. Nottingham City Council set up the not for profit company Robin Hood Energy in 2015 with the aim to make energy affordable for all. Robin Hood Energy differs from other arrangements as the council is acting as administrator and supplier buying directly from the grid, with no third party involved. Robin Hood Energy has made partnerships with Leeds City Council to establish White Rose Energy, providing affordable energy in Leeds and Yorkshire<sup>282</sup>. In October 2017, the London Borough of Islington launched Angelic Energy, London's first not for profit energy company in partnership with Robin Hood Energy<sup>283</sup>. This model reinvests any income into providing good value energy to help the poorest households that are often on 'pay as you go' rates.

## Mix of Tenure

There is a need for a diverse supply of new housing. Delivering additional homes is important but should be achieved with a balanced mix of tenures including market, intermediate and social rent. Diversity in tenure type requires diversity in funding sources and variety of delivery models involving the private and public sectors. By ensuring a mix of housing tenures, output for housing delivery is more productive long term and resilient to market fluctuations<sup>284</sup>. The Draft London Plan (2017) commits to a long-term strategic plan to maximise the delivery of affordable housing and ensure that half of all new homes in London are genuinely affordable to the people who live in London. It is recognised the private sector will be unlikely to be able to deliver the required affordable housing and the Mayor of London intends to support affordable housing delivery through investing more, bringing forward more public sector land for development, and by increasing the amount of affordable housing delivered through the planning system<sup>285</sup>.

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<sup>281</sup> Local Government Association (2012) *Shaping and Improving your private rented sector*, London: Local Government Association

<sup>282</sup> Leeds Council (2018) *Heat your home for less – White Rose Energy* Available at: <https://www.leeds.gov.uk/your-council/planning/heat-your-home-for-less/white-rose-energy>

<sup>283</sup> Islington Council Media Centre (2017) *Angelic Energy: Islington Council launches new, fairer energy provider for London*, London: London Borough of Islington. Available at:

<sup>284</sup> Shelter (2014) *In the mix: the need for a diverse supply of new homes*, London: Shelter

<sup>285</sup> Greater London Authority (2017) *The London Plan: The spatial development strategy for Greater London*, Draft for public consultation, London: Greater London Authority

Brent Council should ensure a variety of both intermediate, affordable and social rent to meet its housing need through new schemes set out by the Mayor of London including incentives for developers to deliver affordable housing such as grant and public funding. Making use of a variety of new affordable initiatives, such as London Affordable Rent, London Living Rent, London Shared Ownership, is crucial to offer routes into home ownership and mobility between tenures to counter-balance the risks associated with an increased dependence on PRS.

## **Response 4: Densification**

There are various ways the density of housing in the borough could be increased. Below the examples of Estate Redevelopment or Infill, Increased density in Suburbs and making use of transport links are provided to show how densification could be used.

### Estate Redevelopment or Infill

The redevelopment of council estates could be a way to put more homes into Brent in a systematic way.

Challenges with this method include finding accommodation for existing tenants whose homes need to be demolished, and reducing the number of times that people have to move as the estate is remodelled. Community infrastructure also needs to be planned alongside the redevelopment – many estates include schools or health centres that need to be rebuilt without disruption to users. Councils are major landowners in London, much of it in housing estates. Redeveloping their land already used for homes at higher densities is while also tackling problems of ageing social housing stock i.e. energy efficiency.

### Increasing Density in the Suburbs

In London 20% of the population occupies 40% of residential land. If the number of homes in these low density suburbs could be incrementally increased by 10%, still well below the current average London density, it would deliver around 75,000 homes. Brent Council Issues and Options paper identifies the north of the borough having retained a 1920-30s lower density typology of 'Metroland' suburbia offering opportunities to increasing housing delivery but around the existing character of the area<sup>286</sup>.

While Londoners as a whole are generally supportive of new housebuilding, research has found outer Londoners much less supportive, which makes it more difficult to add density to the suburbs quickly. However, there are methods which can increase housing provisions with minimal disruption to a neighbourhood's local character. The London Borough of Wandsworth took this approach and delivered 238 homes over ten years with its 'hidden homes' initiative. The hidden homes initiative transforms empty or derelict areas such as old laundries, store sheds, garages, parking, space under existing residential blocks and boiler rooms into new homes. Traditionally, most hidden homes have been built at the ground and lower ground level. But the council's approach has delivered flats in an elevated position to the rear of a block, on roofs and as lateral extensions<sup>287</sup>. Development like this can help sustain the local economy, creating a vibrant neighbourhood. Likewise, adding additional levels to blocks of

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<sup>286</sup> Brent Council (2018) Shaping Brent's Future Together, Local Plan Issues and Options: Regulation 18 Consultation, London: Brent Council

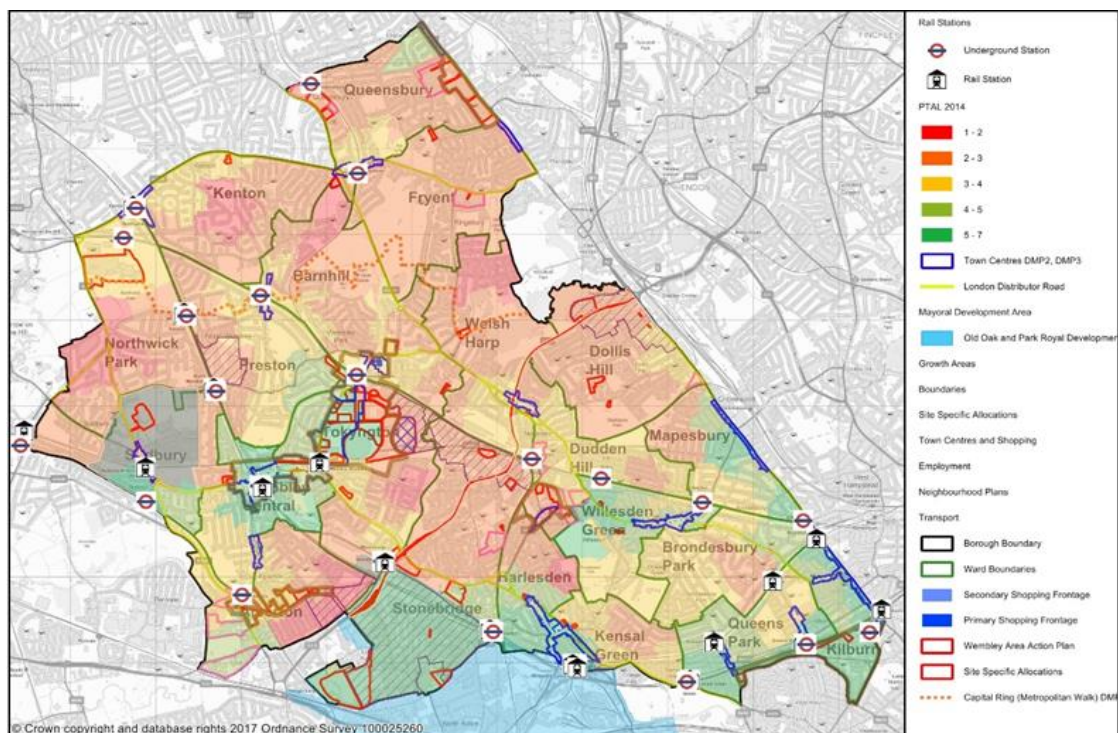
<sup>287</sup> London Borough of Wandsworth (2018) *Hidden Homes*. Available at: [http://www.wandsworth.gov.uk/info/200561/resident\\_involvement/247/hidden\\_homes](http://www.wandsworth.gov.uk/info/200561/resident_involvement/247/hidden_homes)

flats offers a good way to make better use of existing stock in a manner that causes minimal disruption to the local community.

## Transport

Public transport is of central importance to unlocking land opportunities and support housing delivery. The development of public transport must be done alongside a move toward the majority of short trips being walked or cycled to support higher densities and vibrant places. The map below (Figure 131) shows proposed transportation and current transport stops and the PTAL levels, if housing is to be built or refurbished in areas with low PTAL level the council needs to work alongside TFL for better connections.

**Figure 131: proposed transportation and current transport stops**



Source: Brent GIS Mapping

Engaging local communities is an essential step in redeveloping an area. Commonly local communities worry about densities increasing in their area due to the effect on surrounding social and physical infrastructure, local amenities, the size of homes, and adequate open space, both public and private<sup>288</sup>. The council needs to make a case for the benefits of redevelopment. Highlighting how making better use of land can also help deliver more and better transport infrastructure, which denser urban neighbourhoods require, by creating increases in land value<sup>289</sup>. A way to do this may be integrating sites into the existing fabric of the areas or ensuring that community services are provided.

An additional way Brent Council could densify transport locations is through exploring above and around station development. TfL have embarked on a programme of retail, commercial

<sup>288</sup> London First, Savills PLC (2015) Redefining Density: Making the best use of London's land to build more and better homes, London: Greater London Authority.

<sup>289</sup> Ibid

and residential developments at a number of Elizabeth line stations in central London. Plans are in place for 12 major property developments over and around the new Elizabeth line stations and construction sites. In total, the development plans cover more than three million square feet of office, retail and residential space between Paddington and Woolwich<sup>290</sup>.

TfL have identified further sites for potential development including at the new 'Nine Elms' station on the extension of the Northern Line. Lambeth Council granted Transport for London (TfL) planning permission for a new development above and around the new 'Nine Elms' station being built as part of the extension of the Northern line. The development will see the delivery of 332 new homes, 84 of which will be affordable across four blocks, three of which would be above the new underground station<sup>291</sup>. TfL development programme offers opportunities to build homes around the transport hubs and want to work with Local Authorities to do so. Other identified sites include Harrow on the Hill and Northwood stations.

Challenges for these types of development include complicated logistics and public resistance to disruption of station services, as well as commercial challenges. However, Centre for London believe developing above and around stations delivers multiple benefits: from the creation of new land, new homes and new commercial centres in a space-constrained city, to the emergence of exciting new civic eco-systems and public realm<sup>292</sup>. A Centre for London study identified potential stations sites suitable for densification by selecting station areas that are well connected, but had lower residential densities than would be expected from their dominant local character. The 40% least dense well-connected stations were in a predominantly 'central' setting, with Kilburn being identified as a potential station site for densification in Brent<sup>293</sup>. TfL and Network Rail are among the largest landowners in London and both have plans to release or construct their landholdings within the next 5 years, looking to develop joint venture partnerships to facilitate housing delivery<sup>294,295</sup>.

## Response 5: Town Centres, High Streets and Mixed Use Development

The Draft London Plan (2017) sets out the priority to develop Opportunity Areas, brownfield land, and surplus public sector land, sites which are well-connected by existing or planned Tube and rail stations, sites within and on the edge of town centres, and small sites. Intensification of sites should facilitate the delivery of residential and other uses, as well as develop social infrastructure and contribute to town centre and high street renewal<sup>296</sup>. The increase delivery of housing in town centres and high streets has been identified as a trend moving forward and one way of realising this is through higher density mixed-use or residential development. Through this, councils will be able to capitalise on the availability of services within walking and cycling distance, as well as excellent public transport links. The diversification of town centres and high streets is important as the Centre for Retail Research

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<sup>290</sup> Transport for London (2018) Property development above Elizabeth Line stations to create jobs, growth and revenue. (Published March 2018) Available at: <https://tfl.gov.uk/info-for/media/press-releases/2018/march/property-development-above-elizabeth-line-stations-to-create-jobs-growth-and-revenue>

<sup>291</sup> Transport for London (2016) *TfL given the greenlight for development above future Nine Elms Tube station*, London: Transport for London. Available at: <https://tfl.gov.uk/info-for/media/press-releases/2016/march/tfl-given-the-greenlight-for-development-above-future-nine-elms-tube-station>

<sup>292</sup> Hanna, K. & Bosetti, N. (2017) *Ideas above your station: exploring the potential for development at London's stations*. London: Centre for London

<sup>293</sup> Ibid

<sup>294</sup> Transport for London (2017) *Property Development*. Available at: <https://tfl.gov.uk/info-for/business-andcommercial/property-development?intcmp=3440>

<sup>295</sup> Network Rail (2016). Network Rail to unlock land for 12,000 new homes by 2020. Available at:

<https://www.networkrailmediacentre.co.uk/news/network-rail-to-unlock-land-for-12000-new-homes-by-2020>

<sup>296</sup> Greater London Authority (2017) *The London Plan: The spatial development strategy for Greater London*, Draft for public consultation, London: Greater London Authority



underlines that across the UK, the share of consumer spending occurring on high streets will have declined from 50% in 2000 to 40.2% by the end of 2018. This decline is mostly in part to the rise of online retail and out of town shopping centres<sup>297</sup>.

High Streets then present an opportunity to meet London's housing needs through growth and intensification but any development on or around high streets needs to be carried out in a way that does not compromise a high street's ability to deliver both its economic and social functions. Instead the focus needs to be on rejuvenating areas, increasing footfalls and consolidating core retail in conjunction with increasing housing supply.

The Mayor of London has indicated a desire to explore new incentives that could help encourage landowners to consider redeveloping sites that are currently used inefficiently – these include surface car parks and single-storey low density retail centres and stores. Brent should utilise inefficiently used land for housing delivery within town centres to foster renewal and increase footfall. Whilst shifting towards town centre housing can be controversial, Brent Council will need to work with both private developers, residents and housing associations as well as TFL to maximise the opportunity. The Culture and the Night Time Economy SPG highlight Wembley and Kilburn as priority town centre locations that can diversify to support their vitality and viability. Focusing on potential residential and office uses as well as cultural facilities, such as restaurants, galleries and cinemas, in these areas will help deliver additional dwellings, potentially increase employment opportunities and develop the night time economy.

The London Borough of Hammersmith and Fulham took this approach with the King's Mall scheme in Hammersmith town centre. The developer St George West London Ltd re-developed office buildings and car park to provide a mixed-use development comprising of 418 residential units and over 500 square metres of commercial floor space, with replacement car parking and amenity space<sup>298</sup>. The scheme demonstrates the potential to accommodate housing growth in town centres through intensification.

## **Response 6: Increase of the Private Rented Sector**

There is currently a lot of political momentum in the private rental sector, with the letting fee ban coming into force June 2019. Build to Rent is becoming more prevalent and the Mayor is championing a London Living Rent. The PRS is growing and is increasingly impacting more varied demographics, therefore, a coordinated response is required to ensure that the opportunities related to the PRS are utilised.

### Partnership working

One step the council could take is to work more closely with Landlords. This is currently being done through licensing all private rented houses in multi-occupation (HMOs) in Brent and all privately rented properties in the wards of Harlesden, Wembley Central and Willesden Green require a licence. The Selective licensing has been extended to include all privately rented properties in Dudden Hill, Kensal Green, Kilburn, Mapesbury and Queen's Park and this scheme will come into effect on 1<sup>st</sup> June 2018. The information gathered through this should be used by the council to understand the makeup of the PRS in Brent.

From here the council can create a working relationship with landlords in the borough. This could be used to provide better information for landlords and agents to ensure that they are compliant with regulations. A way of providing information could be through an online platform,

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<sup>297</sup> Greater London Authority (2017) *High Streets for all*, London: Greater London Authority

<sup>298</sup> Greater London Authority (2017) *Town Centres Supplementary Planning Guidance*, London: Greater London Authority

similar to GetRentr. This is a property tech platform designed to help agents and landlords fulfil their compliance obligations and better serve their tenants. This was created after recognising that landlord regulation is operated independently by each local authority, the company researched every UK local authority website and source of information to determine if they operate PRS licensing schemes and assess the accessibility and volume of online information. It found that Local Authorities in England operate over 500 schemes, with inconsistencies in the information available. GetRentr has aggregated this data and mapped every licensing scheme in the country. Their software automatically tracks new consultations and schemes, and when existing schemes are renewed or expire<sup>299</sup>. The service informs registered agents and landlords whether properties are compliant with regulation in seconds.

### Tenancy options

In term of the supply of the PRS in Brent is at the forefront of the Build to Rent sector with the largest site in the UK. This momentum should be used to create other similar sites across the borough, potentially looking to create properties focused on key demographics such as the elderly.

There is also scope for Brent to try and provide rental properties that charge discounted market rents and also to promote the London Living Rent as a route to home ownership. The Sugar Works development at Royal Wharf, Silvertown, is the first place in London to offer London Living Rent. The L&Q housing association is delivering this and providing 243 London Living Rent homes. Rents in The Sugar Works are up to 50% cheaper than local market rents, leading to savings of between £573 and £1,077 a month for tenants. Tenants are offered a 3 year fixed-term Assured Short hold tenancy with L&Q and towards the end of the fixed-term tenancy, they are given the option to purchase the home at its full market value through Shared Ownership or outright sale, depending on what they can afford<sup>300</sup>.

Brent should also use planning policies to compel developers to offer longer tenancies with tenant break clauses. Build to Rent developments should offer longer tenancies as standard. This benefits both the developer and the tenants – minimising periods when properties are empty; while also giving tenants the security of a long tenancy in a well-designed and managed home<sup>301</sup>. Some developer-operators are taking the lead, for example Get Living London offer this as standard in their East Village neighbourhood.

### Homeshare

Alternative options to building additional homes is to find ways to minimise under occupation in the borough as well as tackle social issues such as social isolation in an ageing population. Homeshare (also known as ‘Host Homes’) brings together two unrelated people to share a home for mutual benefit. Both the Homesharer and Householder have something they need and something they can give to each other. Typically, an older Householder with a room to spare, will be carefully matched with someone who needs low cost accommodation and can provide an agreed amount of support in exchange. The type of support provided might include help with daily tasks such as shopping or enabling reengagement with the local community and social activity<sup>302</sup>. Homeshare makes effective use of homes that are not fully occupied and offers alternative housing options without relying on increased development or disruption to the borough.

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<sup>299</sup> Future of London (2017) Engaging London’s Private Rented Sector, London: Future of London

<sup>300</sup> L&Q (2018) Get Priced in with L&Q: The Sugar Works at Royal Wharf, E16. Available at: <https://lqpricedin.co.uk/london-living-rent-properties/>

<sup>301</sup> Future of London (2017) Engaging London’s Private Rented Sector, London: Future of London

<sup>302</sup> Sharedlives Plus (2017) The UK Network for Homeshare: Executive Summary 2017. Available at: [Homeshare UK](https://www.sharedlivesplus.org.uk/)

Funded initially by the Big Lottery, Homeshare Isle of Wight was launched in 2017, and is run by, Age UK Isle of Wight, providing the reassurance of thorough vetting (including uptake of references and DBS checks) in order to arrive at compatible, enjoyable and mutually beneficial home sharing matches. Age UK Isle of Wight Homeshare coordinators' work with health and social care colleagues and other Age UK projects, to recruit and thoroughly screen householders and sharers<sup>303</sup>. Their role is to guide householders and sharers to arrive at a compatible, lasting and enjoyable blueprint for living together. This takes account of practicalities, personalities, lifestyle and routines.

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<sup>303</sup> Homeshare Isle of Wight, Available at: <http://www.homeshareiow.org/>

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