

October 2019

# How many homes did housing associations deliver in quarter one 2019/20?

## Summary of key points:

- Housing associations started 51,618 homes in the 12 months up to and including June 2019
- They also completed 45,414 homes in the 12 months up to and including June 2019
- 11,823 homes were started in 2019/20 Q1, an increase of 23.5% from the same quarter last year
- Housing associations also completed 9,125 homes in 2019/20 Q1, 2% less than the same quarter last year
- 48% (5,650) of homes started were delivered outside the Affordable Homes Programme in Q1
- 43% (3,924) of homes completed were delivered outside the Affordable Homes Programme in Q1
- 57% (5,379) of affordable starts were delivered through Section 106 agreements in Q1
- 50% (4,588) of affordable completions were delivered through Section 106 agreements in Q1

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## 1. How did we get to this figure, and why did we do it this way?

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There has been a long-standing problem with the available data on the supply of new housing association homes. The housebuilding figures published by the Ministry of Housing, Communities and Local Government acknowledge that the tenure split used has its limitations and is not the best source of information on new build affordable housing. For example, they do not attribute all homes which are delivered for housing associations through Section 106 agreements to the housing association category. In addition to this, the data published by the Homes England (HE) and Greater London Authority (GLA) only captures activity within the programmes they fund, so misses out provision of homes outside these programmes, whether they are market or sub-market products.

In order to address this, and gain a more complete picture of the level and breadth of development activity engaged in and funded by our members, we have collected data on new development directly from developing housing associations. This includes affordable homes delivered by the private sector through Section 106 agreements, but are acquired and owned by housing associations.

We achieved a response rate of 88%. As such, we believe that this figure will be a slight underestimate of the actual total. Survey respondents represent 89% of total stock owned by developing housing associations, indicating that the majority of non-respondents are smaller organisations.

## 2. Overall tenure breakdown

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*Table 1 – starts by quarter and tenure type*

|                                  | Q1<br>17/18  | Q2<br>17/18  | Q3<br>17/18   | Q4<br>17/18   | Q1<br>18/19  | Q2<br>18/19   | Q3<br>18/19   | Q4<br>18/19   | Q1<br>19/20   |
|----------------------------------|--------------|--------------|---------------|---------------|--------------|---------------|---------------|---------------|---------------|
| <b>Social Rent</b>               | 1,140        | 792          | 1,155         | 1,086         | 1,238        | 840           | 1,753         | 1,616         | 1,088         |
| <b>Affordable Rent</b>           | 3,717        | 3,449        | 4,410         | 6,155         | 3,770        | 4,311         | 4,416         | 6,878         | 4,362         |
| <b>Affordable Home Ownership</b> | 3,074        | 2,885        | 3,335         | 4,319         | 2,913        | 3,958         | 4,247         | 5,726         | 4,042         |
| <b>Market Rent</b>               | 229          | 556          | 117           | 627           | 101          | 262           | 30            | 606           | 369           |
| <b>Market Sale</b>               | 1,093        | 2,111        | 1,411         | 1,911         | 1,555        | 1,647         | 1,100         | 2,405         | 1,962         |
| <b>Grand total</b>               | <b>9,253</b> | <b>9,793</b> | <b>10,428</b> | <b>14,098</b> | <b>9,577</b> | <b>11,018</b> | <b>11,546</b> | <b>17,231</b> | <b>11,823</b> |

*Table 2 – completions by quarter and tenure type*

|                              | Q1<br>17/18  | Q2<br>17/18  | Q3<br>17/18  | Q4<br>17/18   | Q1<br>18/19  | Q2<br>18/19   | Q3<br>18/19   | Q4<br>18/19   | Q1<br>19/20  |
|------------------------------|--------------|--------------|--------------|---------------|--------------|---------------|---------------|---------------|--------------|
| Social Rent                  | 1,140        | 939          | 1,014        | 1,409         | 1,227        | 1,016         | 1,398         | 1,542         | 1,237        |
| Affordable Rent              | 4,558        | 4,538        | 4,699        | 6,378         | 4,337        | 4,342         | 4,764         | 5,801         | 3,745        |
| Affordable Home<br>Ownership | 2,372        | 2,288        | 2,347        | 4,112         | 2,647        | 3,091         | 3,872         | 4,680         | 2,662        |
| Market Rent                  | 242          | 350          | 306          | 334           | 391          | 582           | 529           | 842           | 240          |
| Market Sale                  | 1,201        | 789          | 895          | 1,545         | 713          | 1,178         | 1,236         | 1,416         | 1,241        |
| <b>Grand total</b>           | <b>9,613</b> | <b>8,904</b> | <b>9,261</b> | <b>13,778</b> | <b>9,315</b> | <b>10,209</b> | <b>11,799</b> | <b>14,281</b> | <b>9,125</b> |

*Table 3 – starts by tenure type and programme*

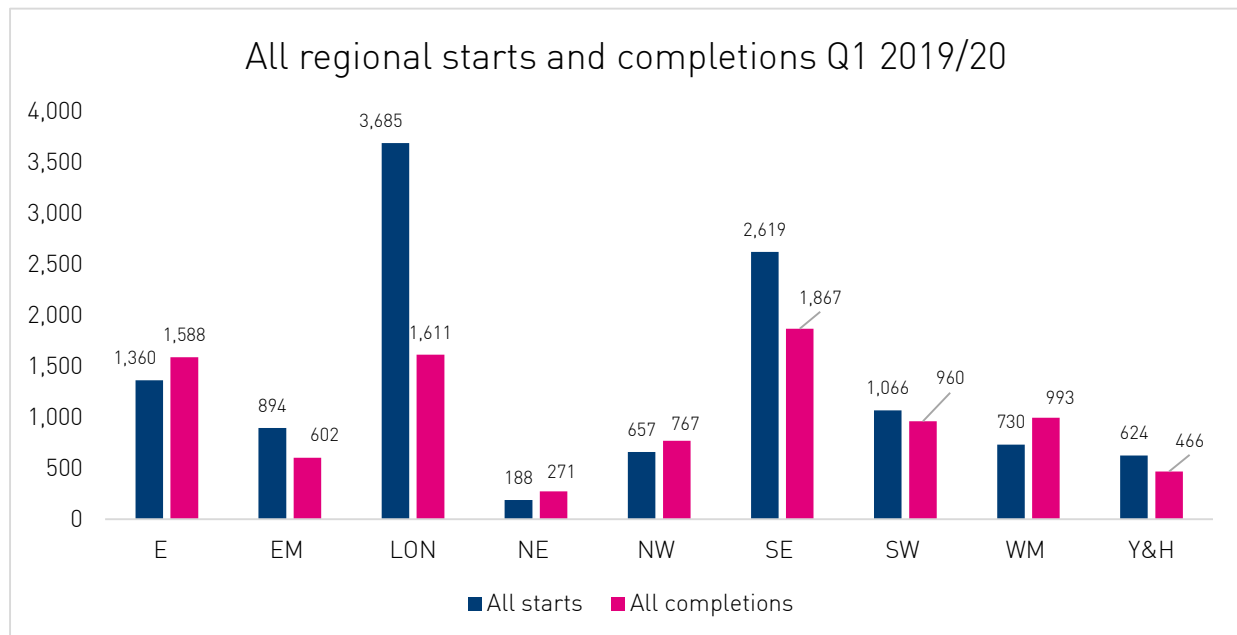
|                           | Inside AHP   | Outside AHP  | Total         |
|---------------------------|--------------|--------------|---------------|
| Social Rent               | 371          | 717          | 1,088         |
| Affordable Rent           | 2,935        | 1,427        | 4,362         |
| Affordable Home Ownership | 2,867        | 1,175        | 4,042         |
| <b>Total affordable</b>   | <b>6,173</b> | <b>3,319</b> | <b>9,492</b>  |
| Market Rent               | 0            | 369          | 369           |
| Market Sale               | 0            | 1,962        | 1,962         |
| <b>Total Market</b>       | <b>0</b>     | <b>2,331</b> | <b>2,331</b>  |
| <b>Grand total</b>        | <b>6,173</b> | <b>5,650</b> | <b>11,823</b> |

*Table 4 – completions by tenure type and programme*

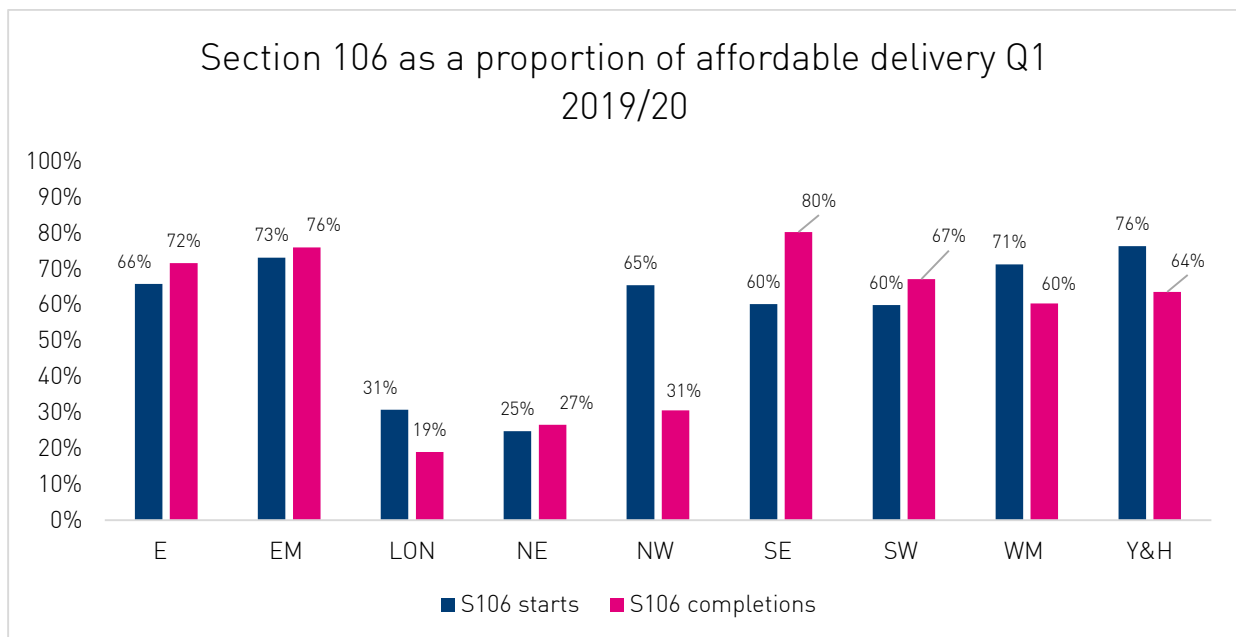
|                           | Inside AHP   | Outside AHP  | Total        |
|---------------------------|--------------|--------------|--------------|
| Social Rent               | 479          | 758          | 1,237        |
| Affordable Rent           | 2,909        | 836          | 3,745        |
| Affordable Home Ownership | 1,813        | 849          | 2,662        |
| <b>Total affordable</b>   | <b>5,201</b> | <b>2,443</b> | <b>7,644</b> |
| Market Rent               | 0            | 240          | 240          |
| Market Sale               | 0            | 1,241        | 1,241        |
| <b>Total Market</b>       | <b>0</b>     | <b>1,481</b> | <b>1,481</b> |
| <b>Grand total</b>        | <b>5,201</b> | <b>3,924</b> | <b>9,125</b> |

### 3. Regional results

There are significant regional variations in the number of homes being delivered across the country. The majority of development takes place in London and the South East. The North East and Yorkshire and Humber – where the housing crisis takes a different form - deliver comparatively fewer homes.



Using Section 106 as a mechanism to deliver new homes also varies across the country. As a proportion of affordable delivery, this was a particularly important way of starting new homes in the East Midlands and Yorkshire and Humber this quarter. When looking at proportion (and volume) of affordable housing delivered, Section 106 was particularly important for completions in the South East.



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