CENTRE POINT
ENDING YOUTH HOMELESSNESS

BRIDGING THE GAP

Challenges young Londoners face when Moving On

ABOUT THIS RESEARCH

This report is a deep dive specifically on the region of London. It draws from the second iteration of Centrepoint's Move On research. The 2026 Move On report brings together comparative analysis drawing from the first iteration of this research published in 2025, alongside new analysis of the pathways young people take through the housing system by drawing on multiple data sources to better understand the availability, affordability, and suitability of accommodation available to them.

This research has been funded by Nationwide as part of their Fairer Futures programme. Centrepoint would like to express gratitude to Nationwide for funding this research to aid understanding of how move on for young people experiencing homelessness changes.

We are grateful to WPI Economics, who were commissioned by Centrepoint to undertake the analysis that underpins this report. A full description of the methodology used can be found in the technical appendix.

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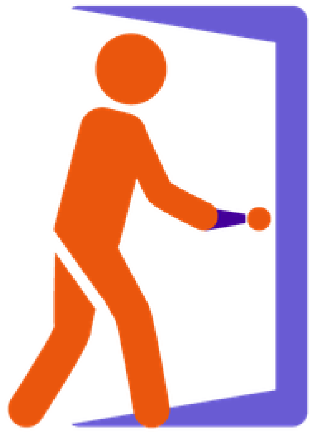
INTRODUCTION

Building on the findings of the first Move On report [1], this follow-up piece takes a closer look at what happens for young people navigating the capital's housing landscape. While the national report highlighted the systemic barriers preventing young people from moving out of homelessness and into stable accommodation, this London close-up explores how those challenges manifest at a regional level [2].



Young people across England face significant barriers in accessing secure housing, but the challenges are particularly acute in London. The capital has some of the biggest challenges for young people, yet they are less likely to be allocated social housing compared to other regions (12% of allocation were to young people in the capital, compared to the 17% England rate). This disparity shows that the system is not meeting the needs of young Londoners as effectively as elsewhere.

Pressure is illustrated by long waiting lists and a limited supply of suitable homes, particularly smaller properties that young people are most likely to need. While London has a large number of young households on housing registers, access to social housing is often delayed and highly competitive, making it difficult for many to move on from insecure living situations. This reflects a system that is struggling to operate preventatively and is instead focused on responding to the most urgent cases.

At the same time, the alternatives are becoming less viable. The private rented sector plays a major role in housing young people in London, but it is characterised by high costs, variable quality, and declining availability of more affordable options such as shared housing. Recent reductions in this type of accommodation, combined with rising rents, are making it harder for young people to find and sustain tenancies.

Taken together, these trends point to a housing system in London that is under sustained strain. Limited access to social housing, growing reliance on temporary accommodation, and increasing pressures in the private rented sector are narrowing the pathways into stable housing, leaving many young people with few secure options.

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[1] The full Move On 2026 report is available here: Stuck in limbo: why too many young people can't 'Move On' | Centrepoint

[2] To access the technical appendix and glossary, the full report is available here: Stuck in limbo: why too many young people can't 'Move On' | Centrepoint

SOCIAL HOUSING

NUMBER OF MAIN DUTIES AND SOCIAL HOUSING ALLOCATIONS

To assess how well the housing system supports young people, it is useful to look at two key measures: main duty and social housing allocations.

In the Homelessness Reduction Act (HRA), a main duty is owed when a local authority has a legal responsibility to secure accommodation for someone who is homeless and in priority need, making it a key indicator of acute housing need. Social housing allocations, meanwhile, show how homes are distributed to those in need and provide a route into stable, long-term housing.

Comparing these measures helps to understand whether the level of support available matches the scale of need among young people.

Centrepoint's Youth Homelessness Databank revealed that there were 10,218 young people who were owed a main duty in 2024/25 across England [3]. On a regional level, London had the greatest number of main duties owed to young people with over 2,300, which is approximately 12% of the main duties owed in the region of the total of 20,090 duties owed in London overall.

We can assess how well allocations meet need by comparing the share of allocations received by young households with the share of main duties owed to them. If young people receive a smaller proportion of allocations than the proportion of main duties owed, it suggests their housing needs are being addressed less fully than those of older households.

Nationally, CORE datasets revealed that young people aged 16–24 received 112,638 social housing allocations in 2024/25, representing 17% of all allocations. However, this picture varies significantly by region and London stands out. While other regions allocate a broadly consistent share of homes to young people, and some, such as the East Midlands, only 12% of social housing allocations in London were made to young households in 2024/25. This is broadly in line with the proportion of main homelessness duties owed to young people in the capital (12%). However this is a 2% decrease in the percentage of social housing allocations made in the previous year, which was 14% in 2023/24 (see table 1.1).

This suggests the capital is an outlier as it provides a comparatively smaller share of social housing to this group. The contrast with regions like the North West, which has the highest number of allocations, and the East Midlands, which has the highest proportion, further underlines the extent to which London's housing system is struggling to meet the needs of its younger population.

[3] Source: The Youth Homelessness Databank 2024-25: The Youth Homelessness Databank 2024-2025 | Centrepoint

Table 1.1: Social housing allocations made to young households and in total, 2024/24 and 2023/24.

	2024/25			2023/24		
	16-24	Total	% 16-24	16-24	Total	% 16-24
England	**19,696**	**112,638**	**17%**	**19,790**	**109,363**	**18%**
North East	1,479	8,595	17%	1,638	8,755	19%
North West	3,315	18,328	18%	3,111	17,649	18%
Yorks & Humber	2,382	14,532	16%	2,409	14,286	17%
East Midlands	1,959	10,290	19%	1,871	9,535	20%
West Midlands	2,579	13,752	19%	2,667	14,378	19%
East of England	2,268	11,945	19%	2,421	11,768	21%
London	1,476	11,969	12%	1,286	9,206	14%
South East	2,675	14,789	18%	2,672	14,933	18%
South West	1,563	8,438	19%	1,715	8,853	19%

Source: CORE dashboard 2024/25
Ministry of Housing, Communities and Local Government (MHCLH) (2025). Core Social housing lettings sub-national data dashboard, 2024-25.
See: https://www.gov.uk/government/statistics/social-housing-lettings-in-england-april-2024-to-march-2025. Accessed 19/02/2026.

DEMAND FOR SOCIAL HOUSING

The housing register indicates the scale of demand facing young people waiting for social housing. Based on data gathered through, we estimated the proportion of young households on housing registers in each region and across England. From this, we estimate there are 130,000 young households on housing registers. These 130,000 young households represent 10% of all households on housing registers. At the current rate of social housing allocations, assuming no new applications, it would take six years to clear this waiting list.

The capital was shown to have 20,000 young people waiting on the housing registers. Although young people on housing registers in London make up a smaller share of registers than in other regions, it has the largest overall registered population, resulting in one of the highest numbers of young households on registers nationally. Other regions with the large numbers of young households on registers were the North West (30,000) and Yorkshire and the Humber (20,000).

Table 1.2: Young people on the social homes waiting list, on the 31 March 2025 (2024/25).

Region	Social homes waiting list	Percentage of young households on waiting list (from FOI)	Estimated young households on waiting list
England	**1,340,435**	**10%**	**130,000**
North East	63,211	11%	5,000
North West	209,887	15%	30,000
Yorks & Humber	172,536	12%	20,000
East Midlands	83,509	14%	10,000
West Midlands	127,179	9%	10,000
East of England	91,871	11%	10,000
London	341,421	6%	20,000
South East	117,590	11%	10,000
South West	133,231	10%	15,000

Source: MCHLG local authority housing register data;
MHCLG (2025). Live Table 600: Number of households on local authority housing registers.
See: https://assets.publishing.service.gov.uk/media/691338a18c90b927c818ad85/Live_Table_600.ods. Accessed 20/02/2026.
WPI Economics FOI request of local authorities (see technical appendix).

ACCESSIBILITY/AVAILABILITY OF SOCIAL HOMES

The most common difficulty in seeking social housing is the limited availability of suitable properties. While there are widespread shortages of social housing across the UK, there are particular challenges in accessing one-bedroom homes.

This availability varies by region. Regulator for Social Housing data showed that London has the highest proportion of one-bedroom social homes, with 27% of General Needs Social Rent and 32% of General Needs Affordable Rent properties falling into this category. In London, 28% of General Needs stock, compared to 45% of housing register households recorded as requiring a one-bedroom. In contrast, the North East has the lowest proportion: 22% of General Needs Social Rent and just 8% of General Needs Affordable Rent properties are one-bedroom.

TEMPORARY ACCOMMODATION IN LONDON 2024/25

London is the region with the largest number of young households in temporary accommodation, with 4,960 households on 31 March 2025. However, because London has a relatively high overall number of households in temporary accommodation, young households represent only 7% of that total, the lowest proportion of any region. By contrast, the East Midlands has the highest proportion, with 730 young households making up 17% of all households in temporary accommodation.

Across England, just under a quarter (24%) of social housing allocations to young households were made to those previously living in temporary accommodation. While it is important that sufficient social housing is available for households in temporary accommodation who wish to move into it, social housing must also remain accessible to young households who are not currently in temporary accommodation. Increasing the share of allocations going to households in temporary accommodation is therefore not a sustainable long-term solution and instead reflects significant pressure within both the social housing and temporary accommodation systems.

This pattern is particularly visible in London. The capital has relatively few social housing allocations to young households relative to its population size, but a high proportion of those allocations go to young households leaving temporary accommodation. This suggests both a high level of need among the young people who do secure social housing and a system that is less likely to allocate social homes to young people unless their need is especially acute. The importance of this pathway varies significantly by region. In London, 34% of allocations to young households are made to those leaving temporary accommodation, compared with just 8% in the North East.

4,960

households in London were in temporary accommodation on 31 March 2025

7%

of London households in temporary accommodation are young households - the lowest proportion of any region

Table 1.3: The number and proportion of young households in temporary accommodation (TA) on the 31 March 2025, compared to on the 31 March 2024.

	On the 31st of March 2025		On the 31st of March 2024	
	Young households in TA	% of total households in TA	Young households in TA	% of total households in TA
England	**12,390**	**9%**	**11,840**	**10%**
North East	160	13%	150	13%
North West	1,040	12%	1,080	14%
Yorks & Humber	530	14%	490	14%
East Midlands	730	17%	640	18%
West Midlands	720	8%	720	9%
East of England	1,240	13%	1,140	13%
London	4,960	7%	4,710	7%
South East	2,190	14%	2,060	14%
South West	830	15%	840	16%

Sources: FOI requests of MHCLG; MHCLG Additional temporary accommodation breakdown 31 March 2025;
Ministry of Housing, Communities and Local Government (MHCLG) (2025). Statutory homelessness in England: financial year 2024-25.
See: https://www.gov.uk/government/statistics/statutory-homelessness-in-england-financial-year-2024-25. Accessed 18/02/2026.
MHCLG Additional temporary accommodation breakdown 31 March 2024.
Ministry of Housing, Communities and Local Government (MHCLG) (2025). Statutory homelessness in England: financial year 2023-24.
See: https://www.gov.uk/government/statistics/statutory-homelessness-in-england-financial-year-2023-24. Accessed 18/02/2026.

PRIVATE RENTING FOR YOUNG PEOPLE IN LONDON IN 2024/25

The private rented sector (PRS) plays a particularly significant role in London's housing system. In 2024/25, around 19% of England's households lived in the private rented sector (PRS), a proportion that has remained broadly stable over the past decade. This share is higher than that of the social rented sector (16%) but substantially lower than owner-occupied housing (65%). This represents a notable shift from 2008/09, when owner occupation was more common (68%), and the social rented sector accounted for a slightly larger share of households (14%) than the private rented sector.

However, London's housing landscape differs notably from the national picture. More than 28% of households in the capital live in the PRS, over 10 percentage points above the England average excluding London [4].

Despite this reliance, quality remains a significant concern. In 2024, 22% of PRS households in England were living in non-decent homes, compared to 10% in the SRS and 15% in owner-occupied-housing, an increase of 60,000 households from the previous years. However, regional differences are stark: in London, 17% of PRS homes are classed as non-decent, rising to 27% in Yorkshire and the Humber.

28%

of households in London live in the private rented sector

17%

of private rented sector homes in London are classed as non-decent

[4] MHCLG (2025). English Housing Survey. See: https://www.ons.gov.uk/economy/inflationandpriceindices/datasets/priceindexofprivaterentsukhistoricalseries. Accessed 20/02/2026.

AFFORDABILITY AND AVAILABILITY

Affordability and availability in the PRS present particular challenges in London, where pressures are more acute than in other regions. In 2024/25, London experienced the fastest rental price inflation in England, with rents increasing by 10.2% in nominal terms. While other regions also saw significant rises - 9.4% in the North West and 8.7% in the East Midlands, London's higher baseline costs likely mean these increases have a more pronounced impact on affordability [5]. The region with the lowest (albeit still significant) increase in rents was Yorkshire and the Humber (6.2%).

Alongside rising costs, access to suitable accommodation is becoming increasingly constrained. In a survey of 2,000 young people, a third (33%) of respondents reported a lack of suitable housing when searching for private rented accommodation. In London, where affordability pressures are highest, many young people depend on houses of multiple occupation (HMOs) as one of the most affordable options in the private rented sector.

However, this form of housing is becoming less available. Across England, the number of HMOs has fallen from over 510,000 in 2019/20 to 458,000 in 2024/25, a 10% reduction [6]. There has also been a 3% decline in the past year alone, with much of this decrease concentrated in the south of England. The sharpest fall has been in London, where HMO numbers dropped by 9% in a single year. Given the capital's high housing costs and reliance on shared accommodation, this rise is particularly concerning.

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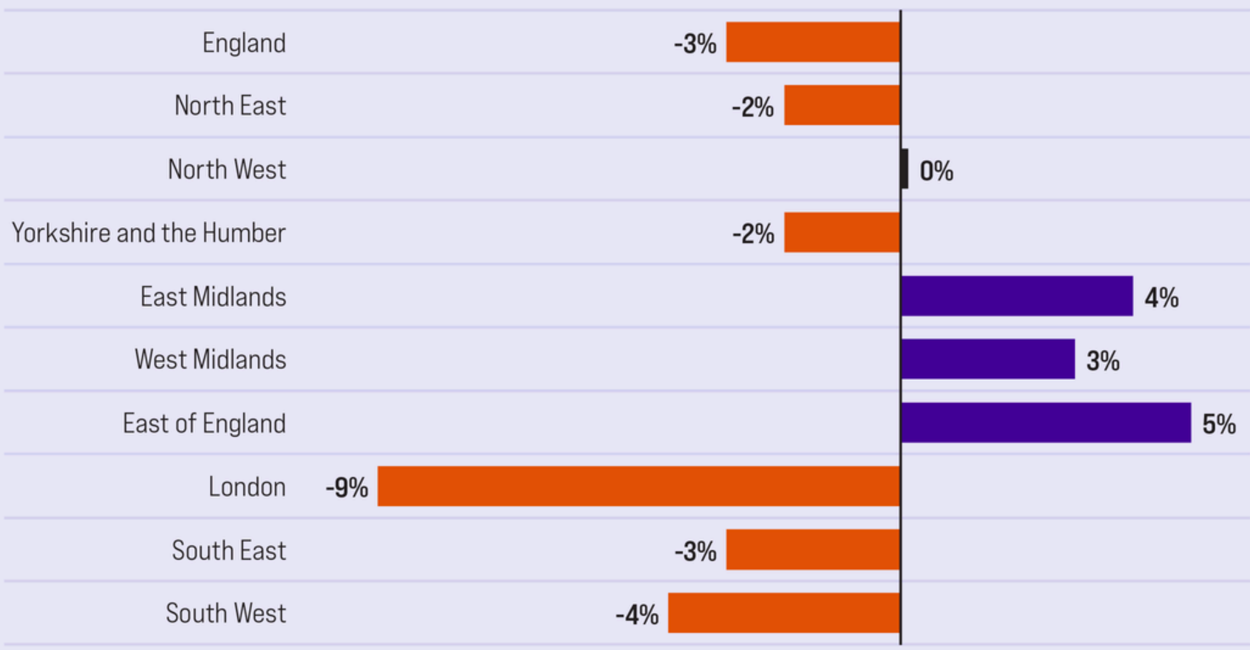
[5] Source: Price Index of Private Rents. ONS (2025). Price Index of Private Rents, UK: historical series. See: https://www.ons.gov.uk/economy/inflationandpriceindices/datasets/priceindexofprivaterentsukhistoricalseries. Accessed 20/02/2026.

[6] Source: MHCLG Local Authority Housing Data. MHCLG (2025). Local Authority housing data. See: https://www.gov.uk/government/collections/local-authority-housing-data. Accessed 24/02/2026.

Rising rents, a shrinking supply of HMOs, and the constraints imposed by the Shared Accommodation Rate (SAR) are all narrowing the already limited options available to young renters in London. As more affordable routes into the PRS decline, many young people are finding it increasingly difficult not only to access housing, but to sustain it over time.

Table 1.4: Percentage-change in the estimated number of HMOs between 2023/24 and 2024/25, by region.



Source: MHCLG Local Authority Housing Data.
MHCLG (2025). Local Authority housing data. See: https://www.gov.uk/government/collections/local-authority-housing-data. Accessed 24/02/2026.

CONCLUSION

London's housing system is under sustained and intensifying pressure, and young people are among those most affected. This deep dive shows a clear mismatch between the scale of need and the options available: high levels of youth homelessness, long waiting lists for social housing, and limited access to suitable homes all point to a system struggling to respond effectively.

For many young Londoners, access to stable housing is increasingly shaped by crisis rather than prevention. Social housing is often only secured once needs have become acute, while temporary accommodation plays a growing role in the pathway to a permanent home. At the same time, the private rented sector, despite being the most common alternative, offers diminishing security, with rising costs, declining availability of affordable options, and ongoing concerns about quality.

What emerges is a housing landscape in which routes into independence are narrowing. Young people face longer periods in insecure or unsuitable accommodation, with fewer opportunities to move on into stable, long-term housing. Without targeted action to increase supply, improve access, and rebalance the system towards prevention, these pressures are likely to deepen.

Addressing these challenges will be critical not only to tackling youth homelessness, but to ensuring that London remains a city where young people can build and sustain independent lives.

RECOMMENDATIONS

1. Increase the supply of one-bedroom homes through London Plan policy and funding priorities

MHCLG, the GLA and London boroughs should work to increase the supply of one-bedroom social homes where there is a clear unmet demand from young people.

- Use GLA and government funding programmes (e.g. Affordable Homes Programme) to prioritise bids that include one-bedroom homes for single young people.
- The GLA should require boroughs to evidence demand for one-bedroom homes in their Local Plans and align delivery targets accordingly.
- The GLA should not permanently reduce the level of affordable housing required for fast-track planning of residential schemes (35% and 50% on public land) by 15% as recently implemented.

2. Reduce barrier to accessing and sustaining social rent in London

MHCLG and the GLA should work with London boroughs and housing providers to ensure social housing is accessible to young people on low incomes.

- Use funding conditions attached to GLA grants to ensure providers adopt inclusive allocation and affordability policies.
- Social housing providers should review the use of affordability checks on potential tenants so they are not used to prevent those on the lowest income from accessing social housing. This is particularly vital for young people who are only entitled to receive lower rates of Universal Credit and, routinely, earn lower rates of pay.

3. Reduce time spent in unsupported temporary accommodation

The GLA should take a stronger coordinating role to reduce long stays in temporary accommodation across London.

- Set a London-wide expectation or target to limit time spent in unsupported temporary accommodation, particularly beyond 12 months.

4. Improve access to the private rented sector in London

National government and the GLA can act to improve affordability and access to London's private rented sector.

- The Government should remove the Shared Accommodation Rate, which would enable young Universal Credit recipients to better afford one-bedroom private rentals.
- The Government should also return to the pre-2016 system of annual LHA reviews, aligning allowances with real-time rental market costs.
- The GLA should expand schemes such as rent deposit support, landlord incentives, and tenancy sustainment programmes for young renters.

5. Expand Stepping Stone accommodation through London planning and funding

National and London planning policies should be amended to recognise Stepping Stone housing as an affordable housing product enabling them to be built more quickly, and to scale.

- The Government should recognise Stepping Stone homes through a National Decision Making Policy (NDMP) so that developers have material evidence to support the planning process with Local Planning Authorities.
- The GLA should update existing London Plan policy H12 (or its equivalent in the new London Plan), to account for the Stepping Stone housing model.

ENDNOTES

MHCLG (2025). English Housing Survey. See: https://www.ons.gov.uk/economy/inflationandpriceindices/datasets/priceindexofprivaterentsukhistoricalseries. Accessed 20/02/2026.

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Stuck in limbo: why too many young people can’t ‘Move On’ | Centrepoint.

The Youth Homelessness Databank 2024-2025 | Centrepoint.

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