Weekly Summary

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26th September 2025

DATA: ONS published UK population estimates for mid-2024

They report "The population of the UK continued to grow in the year to mid-2024, reaching an estimated 69.3 million people (69,281,400). The size of the population increased by 755,300 (1.1%) from mid-2023. The population grew faster in England (1.2%) than in Scotland (0.7%), Wales (0.6%) or Northern Ireland (0.4%)."

DATA: ONS reported on the private rented sector across the UK

The report provides "A summary of private rented sector statistics from across the UK to assess their comparability and limitations, and improve statistical coherence".

DATA: VOA published Council Tax: stock of properties data

The useful guide to the housing stock and net additions is limited by the lack of detailed tables due to underlying system changes. The detailed data is promised for the future but the headline data is covered in the Chart of the Week below.

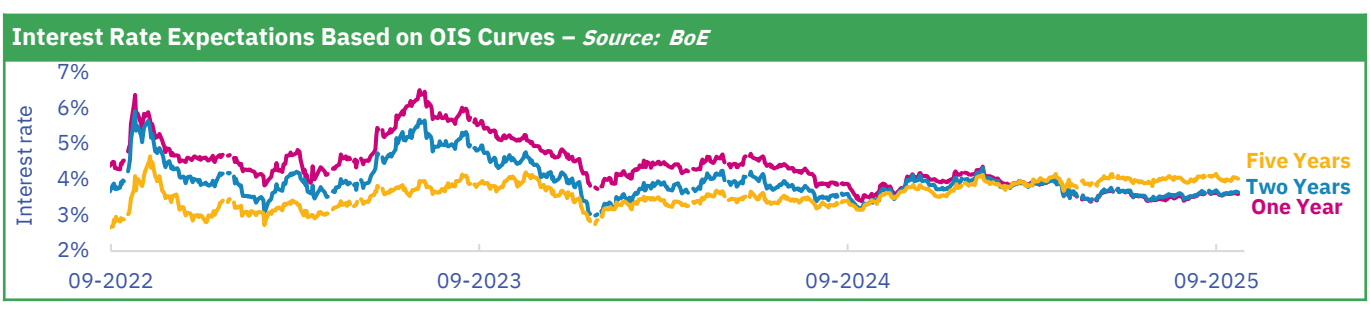
DATA: DfC NI published Northern Ireland Housing Statistics 2024/25

The report covers "supply; energy; social renting demand; private renting demand; owner occupier demand and household characteristics".

DATA: Financial Market Expectations For BoE's Bank Rate

The chart provides a summary for the expected future level of Bank Rate based on daily data. The One Year figure was 3.59% on the 24th Sep compared to 3.63% on the 17th Sep.

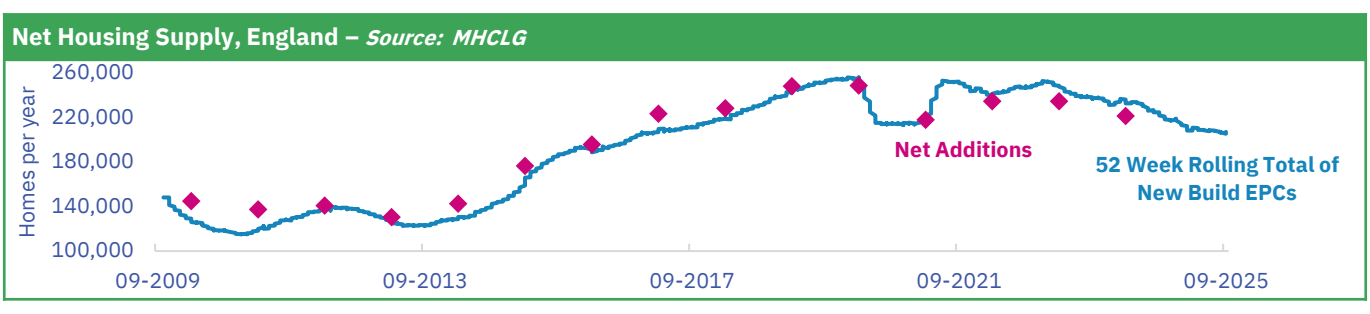
Interest Rate Expectations Based on OIS Curves – *Source: BoE*



DATA: New Build Energy Performance Certificates, England

This chart provides a summary of the number of EPCs on new build properties, a useful leading indicator for net additions. The 52-week rolling total was 206,970 for the week commencing 15th Sep, up from 205,692 the previous week.

Net Housing Supply, England – *Source: MHCLG*



POLICY: PM and MHCLG launched Pride in Place programme

The programme will "help build stronger communities, create thriving places and empower local people" as "Communities will be handed new powers to seize boarded up shops, save their treasured local pubs or libraries and clean up the eyesores in their area".

POLICY: Scottish Gov consultation on compulsory purchase reform

They are "consulting on proposals to modernise the law on compulsory purchase, to make it easier and simpler to improve land and buildings".

POLICY: Scottish Gov call for evidence on housing infrastructure finance

They are asking for evidence "of any site where finance for infrastructure costs is preventing homes from being built".

REPORT: Homes England reported on brownfield development land

The research "examines the added value of Homes England's interventions and how brownfield projects impact overall societal welfare".

REPORT: Shelter reported on the impact of moving into a social rent home

The interim "longitudinal research project in partnership with IKEA has highlighted the immediate benefits of moving into a social rent home". The full longitudinal report by HACT is available here and they also published supplementary research by CEBR on the cost of not delivering social housing.

REPORT: HACT published a roadmap for social housing innovation

It provides a "roadmap for the future of collaborative innovation in social housing over the next 3 – 5 years around these themes: Customers, Workforce, Procurement, Asset management, Smaller Housing Associations, [and] Data and Digital".

REPORT: Housing Ombudsman published Annual Complaint Review

They "made 7,082 determinations – decisions following the investigation of a complaint - between 1 April 2024 and 31 March 2025. This is a 30% increase from 2023-24.". They also "upheld 71% of complaints" and "found 120 landlords had a maladministration rate of over 75%".

REPORT: JRF reported on living standards

They report "Household disposable incomes have not yet recovered to pre-pandemic levels and families are already struggling, but latest economic data and projections imply the worst is yet to come."

REPORT: CaCHE published affordable housing need in Scotland

It "calls for a minimum of 15,693 affordable homes every year in order to reduce affordable housing need". The executive summary of this report was published a few weeks ago.

REPORT: Public First reported on London housebuilding

The report finds that "meeting London's target of building 88,000 new homes a year would deliver a step change in economic growth – boosting productivity in the capital by 5.6% in the long term and raising the average Londoner's take-home pay by £3,700.". Unfortunately, the analysis uses the undercounting building control data as a baseline, which misses about half the market in London, and suggests this analysis is flawed.

REPORT: CPRE reported on the State of Brownfield 2025

They report "there is enough brownfield land to build 1.48 million homes in England, based on data from Local Planning Authorities' most updated brownfield land registers up to 2024" and "More than half (55%) of these sites already have planning permission (either outline permission or better) meaning over 800,000 new homes could be built rapidly".

NEWS: Skipton updated their affordability index

The analysis by Oxford Economics looks more realistic than the first version they published but I'm still not convinced by the geography of the findings. Apparently, it's more affordable to buy in Hertfordshire than Herefordshire.

CORPORATE: Henry Boot published Half-Year Report

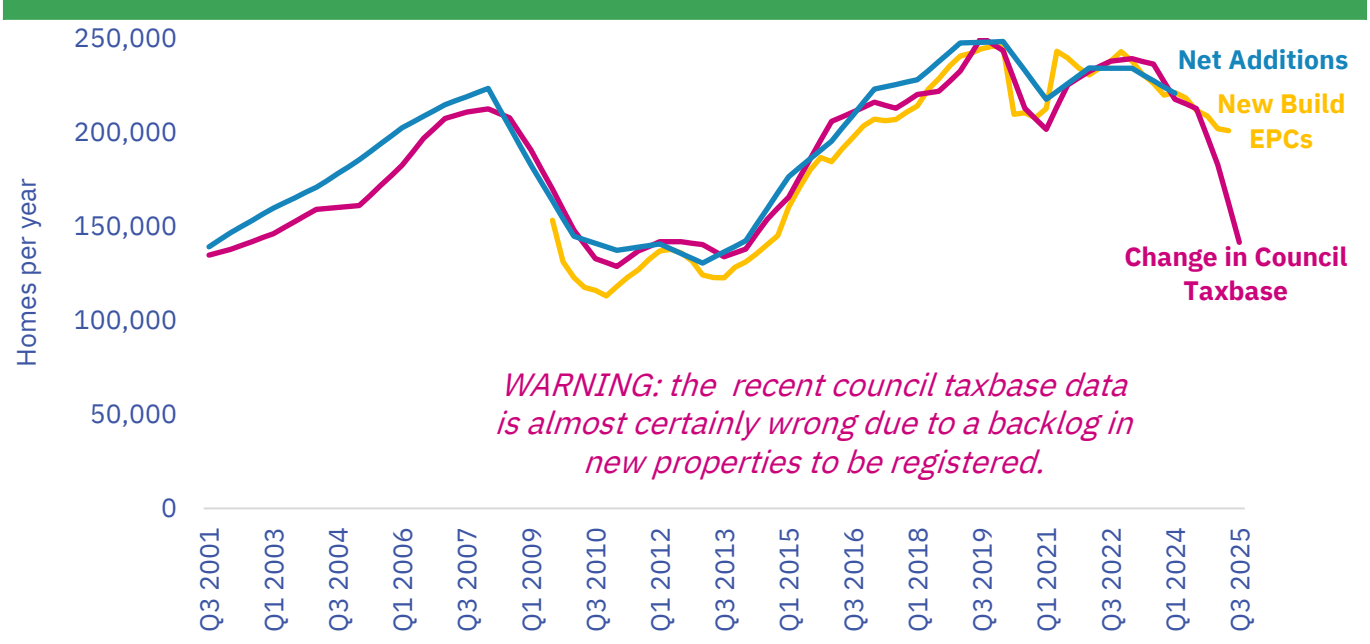
They report "While the government's amendments to the NPPF have improved the process for securing outline consents, including an uptick in success at appeal, the same progress has not been seen for obtaining detailed consents. Many local planning authorities remain under resourced, which has extended the timeframe for decisions and subsequently delayed the opening of new outlets across the home building industry".

Chart of the Week

This week the VOA published their Council Tax: stock of properties data. Usually this is a really useful source of data for the council tax band, age, size, and type of the housing stock at a local level. Unfortunately, the VOA are upgrading their system which means there's a very limited selection of data available and even that looks flawed. For example, as per the chart below, the net change in the council tax data is usually a good leading indicator for the net additions data. However, in the most recent data – covering both March and September 2025 - the data is not consistent with other data sources such as the number of new build Energy Performance Certificates and the latest release shows a net increase in stock of just 141,710 homes in the year to September 2025. This is almost certainly wrong and the VOA informed me that "We are currently upgrading the system we use for Council Tax, which has led to a backlog of new properties to be registered. This means there is a higher number of outstanding new properties that have yet to be included in the Council Tax list than in previous years". I'm not convinced they should've published the data in its current state.

Annual Net Change in Number of Dwellings, England

Source: MHCLG, VOA



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