



# Support to End Homelessness 2025



Homeless Link

A review of  
services  
addressing single  
homelessness in  
England

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### **Produced by**

Homeless Link Research Team

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We are grateful to all the homelessness services who took time out of their busy schedules to complete our survey.

## Executive Summary

For the past eighteen years, Homeless Link's national study on support provided by the homelessness sector in England has provided crucial evidence to inform policy and practice. By exploring key trends in single homelessness and the nature and availability of support, this eighteenth edition of *Support to End Homelessness 2025: A review of services addressing single homelessness in England<sup>1</sup>* makes an important contribution to the evidence base on single homelessness provision in England. The research aims to help service providers, commissioners, policy makers, and local authorities understand and respond to the needs of people experiencing homelessness.

The findings are based on four key data sources: a survey of 188 accommodation providers from across England, a survey of 42 day centres from across England, data from the Homeless England database, and national government statistics. The comprehensive nature of this analysis allows us to assess not only the current state of single homelessness provision, but to identify and analyse historic trends.

## Homelessness trends

Whilst the number of people presenting to their local authority as homeless or at risk of being homeless has slightly declined from the previous year, 2025 was a year marked by unprecedented numbers of households in temporary accommodation and rough sleeping estimates reaching a record high. Whilst encouraging to see a potentially emerging trend in the reduction of overall homelessness, the rise in the most visible and devastating forms of homelessness suggests significant backlog in the wider system with households trapped in temporary accommodation, and unmet needs amongst those sleeping on the streets.

- 325,690 households were at risk of or experienced homelessness in 2025, a 2% decrease from 2024, and a 12% increase since 2019 when the Homelessness Reduction Act (HRA) had been in implementation for 12 months. This includes:
  - 146,370 households threatened with homelessness within 56 days and owed a prevention duty. This is a 2% decrease since 2024, and a 2% decrease from 2019 figures.
  - 179,320 households experiencing statutory homelessness and owed a relief duty. This is a 4% decrease from 2024, and a 23% increase from 2019.
- 51,240 households (35% of the total proportion owed a prevention duty) were owed a prevention duty due to the end of an assured shorthold tenancy in the private rented sector, the most common cause of prevention duty owed.

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<sup>1</sup> From 2008 to 2014 this report series was named Survey of Needs and Provision Services for Homeless Single People and Couples in England (SNAP); from 2015 to 2023 this report series was named Support for Single Homeless People in England: Annual Review.

## Homeless Link

- 51,660 households (29% of the total proportion owed a relief duty) were owed a relief duty because friends and family were no longer willing or able to accommodate, the most common cause of relief duty owed.
- There was a 5% decrease from 2024 in the number of people owed a relief duty as a result of being required to leave accommodation provided by Home Office as asylum support, but an 76% increase from 2022 and 29% increase from 2023 figures, when Home Office first made changes to asylum move-on processes.
- The 2025 rough sleeping snapshot found that 4,793 people were estimated to be sleeping rough on a given night, a 3% increase from 2024 and a 171% increase since 2010.<sup>2</sup> Rough sleeping increased in most English regions, except for marginal decreases in London, East Midlands and Yorkshire & The Humber, compared with 2024.
- As of 31 December 2025, there were 134,210 households in temporary accommodation (TA), a 5% increase on the previous year and 52% increase compared to 2019. The total households in TA at the end of 2025 represents the highest number since current records began.

### Availability of and access to homelessness services

Whilst the number of accommodation projects and bed spaces has increased slightly from 2024, the 2025 report finds a sector that has been steadily declining in size since 2010, and a trend that is at odds with the increases in homelessness and rough sleeping seen across England.

- In 2025, there are 942 accommodation projects for single homeless people in England.
- The number of accommodation projects has slightly increased, by 3%, from last year, but sits at 25% lower than a decade ago in 2015; and 46% lower than 2008 when this data series began.
- There are 34,451 bedspaces in England, an increase of 4% from 2024, but a 6% decrease from 2015, and a 41% decrease since 2008.
- 77% of accommodation projects reported having to turn someone away from their service because the clients' needs were too high or too complex.
- 82% of accommodation projects are mixed gender, with 10% men only and 9% women only.
- 37% of accommodation projects are youth specific services.
- 8% of accommodation projects are able to support people with high or complex needs.

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<sup>2</sup> 2010 is used as the comparator year as this when the current snapshot methodology was introduced. Information on the snapshot approached can be found here: <https://www.gov.uk/government/statistics/rough-sleeping-snapshot-in-england-autumn-2025/rough-sleeping-snapshot-in-england-autumn-2025#snapshot-approach>

- A total of 172 day centres operate throughout England as of 2025. This is a very slight decrease in day centres compared to 2024 (173) but an increase from the number operating in 2023 (168).

### Support needs and support services available

There is evidence that over the last few years the level and visibility of support needs of people accessing homelessness services have increased substantially. Despite most accommodation providers offering low to medium support, almost all services are now supporting people with a range of overlapping needs. Barriers to statutory services, in particular mental health and adult social care services, remain the biggest challenges to ensuring that people can access the support they need.

- 62% of day centres report seeing an increase in people experiencing homelessness for the first time, as do 46% of accommodation providers.
- 37% of day centres and 23% of accommodation providers report increases in supporting people experiencing homelessness whilst in employment.
- A substantial proportion of day centres and accommodation providers, 79% and 33% respectively, report an increase in women accessing their services.
- 72% of day centres and 45% of accommodation providers also report an increase in refugees presenting at services.
- Mental health remained the most commonly reported support need amongst accommodation providers. 90% of accommodation providers support residents with a history of diagnosed mental health conditions. This marks a 5% decrease from 2024, but an 11% increase since 2022.
- All day centres (100%) reported high levels of support needs in relation to history of offending, physical ill health and disability, and alcohol dependency.
- Homelessness services face significant barriers in accessing support services, particularly within health and social care. Access to mental health support remains a big barrier for both accommodation providers and day centres (92% and 89% respectively). 88% of accommodation providers and 95% of day centres also report barriers to accessing adult social care.

### Funding

Since the lifting of the Supporting People ringfence in 2008, the funding model of the sector has changed substantially. There has been a remarkable drop off in the number of accommodation providers supporting people experiencing single homelessness who are funded primarily through their local authority. Instead, there has been a steady rise in Housing Benefit as the main source of funding, with this taking over as the most dominant funding source in the sector in 2017.

- Housing benefit is the most commonly cited primary source of income for accommodation providers (54%), of which, 56% stated Enhanced Housing Benefit was their main source of income. This is followed by local authority commissioned contracts (35%).
- Since the end of the Supporting People ringfence in 2008 there has been a 2603% increase in Housing Benefit as the main funding source for homelessness accommodation providers and a 59% decrease in local authority commissioned contracts.
- Income for day centres is heavily reliant on fundraising, grants and philanthropy, with income from these sources being the main funding for 80% of providers. This is most commonly through grant funding (54%) and individual giving (22%).
- 19% of accommodation providers stated that their income had decreased since the previous year, with 52% stating there was no change to their income, and 28% reporting an increase.
- 27% of day centres stated that their income had decreased since the previous year, with 44% stating there was no change to their income, and 29% reporting an increase.
- 41% of accommodation providers and 46% of day centres reported that they risk service closures as a result of increased financial pressures, and 35% of accommodation providers stated that they have already reduced their provision.

### Move on from accommodation

The main aim of most homelessness services is to support people to access the services and support that they need to move on from homelessness and into independent living, but accommodation providers are facing increasing barriers to accessing these services, and to securing sustainable housing.

- 28% (2,773) of people currently being accommodated are waiting to move on from their current provision into more secure, sustainable housing.
- 55% (1,538) of people waiting to move on have been waiting for six months or longer.
- Lack of available social housing (82%), and the lack of private rented sector (PRS) accommodation at Local Housing Allowance rate (73%) are the two main barriers to moving on from homeless accommodation.
- Of those who do move on from their accommodation, most leave to positive destinations. On average 39% of residents move on to social housing, 27% move on to supported housing, and 15% move on to PRS. In contrast, 8% move on to rough sleeping, 5% move on to prison, and 5% turn to sofa surfing.

### Conclusion

2025 saw the publication of the long-awaited National Plan to End Homelessness, the Government's roadmap to tackling homelessness. The strategy recognises that the current system is crisis-driven and that the sector faces systemic challenges, a thread which is evident throughout the Support to End Homelessness series. This year's report continues to highlight the sheer and sustained financial pressure frontline services operate under. 71% of both accommodation providers and day centres report that rising costs and financial pressures have had negative implications on service delivery. Day centres face particular financial struggles, with over half of day centres reporting that the lack of inflationary increase in commissioned and grant funded projects means some services are no longer financially viable. This is an alarming trend in service closure and reduction given the increased demand for these services, and the vital role that day centres play as the first port of call for people experiencing homelessness, multiple disadvantage and acute crisis.

The statutory data reveals a stark picture of rising homelessness, with rough sleeping estimates and the number of households in temporary accommodation reaching record levels. An estimated 4,793 people were sleeping rough on a given night in 2025, representing a 171% increase since 2010. On 31 December 2025, 134,210 households were in temporary accommodation. This is an increase of 5% from 31 December 2024, and includes 176,130 children living in temporary accommodation. It is vital that the homelessness strategy delivers much needed change, including the new target to halve long-term rough sleeping, and that local authorities use their new funding to secure the provision of the homelessness support services that offer a lifeline to people experiencing homelessness, from day services to emergency accommodation and supported housing.

Homeless Link began tracking the size and scale of the single homelessness sector in 2008. Since then, the number of accommodation providers has reduced by 46% and the number of bedspaces has reduced by 41%. Despite increases in all forms of homelessness over the last eighteen years, the homelessness sector has seen a steady contraction as funding sources and policy priorities have shifted.

The Review has also tracked how homelessness services are funded and how the funding landscape has changed over time. The findings show accommodation providers continue to rely on Housing Benefit (54%) as their primary source of income, of which 56% is through Enhanced Housing Benefit to provide supported exempt accommodation. A sizable proportion of accommodation providers report experiencing increased scrutiny on supported exempt accommodation funded through Enhanced Housing Benefit by their local authority. This has left many services open to financial risk and closure. The 2025 Autumn Budget announced a Value for Money review of homelessness and supported housing funding to consider how existing funding that supports homelessness and rough sleeping can be improved, with an

explicit aim to improve the quality and supply of supported and temporary accommodation. This coupled with newly announced changes to homelessness funding, including the Homeless, Rough Sleeping and Domestic Abuse grant, has the potential to shift the dial for homelessness accommodation provision and the wider system. The changes to the funding model is a welcome acknowledgement by the Government that funding cuts, removal of ringfencing, and short-term funding cycles have led to many systemic challenges. The consolidated ring-fenced pot of funding is being introduced amidst the incoming arrival of increased scrutiny and regulation for supported housing providers in England, which will likely bring seismic changes to the sector.

Findings in 2025 demonstrate a continued trend of people presenting to services with increased complexity of needs and from diverse populations driven by varied causes of homelessness. Mental health remains the most commonly reported support need amongst accommodation providers (90%), with 100% of day centres reporting high levels of support needs in relation to history of offending, physical ill-health and disability, and alcohol dependency. The commitment of £124m of new investment in supported housing services, and new programmes to support people with multiple disadvantage, mental health, and substance use support needs in the new strategy is very much welcomed.

Despite this, providers faced accessibility barriers when linking their clients into necessary services. Whilst access to mental health support remains a significant challenge, homelessness services also report barriers to adult social care services (88% of accommodation providers and 95% of day centres). Faced with people with acute needs who are unable to access social care support, homelessness services have increasingly stepped in to fill gaps in care provision. This has created a shadow social care sector, delivering support to some of the most vulnerable adults in our society without oversight, input or resource from adult social care. We welcome the Casey Commission, an independent review of adult social care running until 2028. It offers an opportunity to think about where homelessness support fits in the social care landscape and an imperative chance to interrogate the interaction between unmet social care needs and homelessness.

The impact of the lack of affordable housing is evident throughout the 2025 Review. 28% of people being accommodated on a given night were waiting to move on, of which over half (55%) had been waiting for six months or longer. Systemic barriers such as the lack of available social housing and PRS accommodation at LHA rate are causing significant blockages in the system.

*The 2025 Support to End Homelessness: Review of Services Addressing Single Homelessness* highlights the role of frontline homelessness services in responding to the rising demand, changing profile of need, and systemic barriers within the housing and health and social care sectors. Years of stagnant funding and real-term cuts have pushed services to breaking point, services need sustainable funding that enables

them to keep their doors open and continue to provide a lifeline for vulnerable people. To *'get back on track to ending homelessness and rough sleeping'*, all of government must take responsibility to break the cycle of homelessness by delivering fundamental change for the system, shifting to a sustainable model rooted in prevention and long-term support.

### Chapter 1: Introduction

For the past eighteen years, Homeless Link’s national study on support provided by the homelessness sector in England has provided crucial evidence to inform policy and practice. By exploring key trends in single homelessness and the nature and availability of support, this eighteenth edition of *Support to End Homelessness 2025: A review of services addressing single homelessness in England*<sup>3</sup> makes an important contribution to the evidence base on single homelessness provision in England. The research aims to help service providers, commissioners, policy makers, and local authorities understand and respond to the needs of people experiencing homelessness.

### Methodology

The findings for this report are drawn from four key data sources:

1. An online survey of 188 accommodation providers (21% response rate) conducted between September 2025 and November 2025.
2. An online survey of 42 homelessness day centres (25% response rate) conducted between September 2025 and November 2025.

The sample structure was a vital part of this survey. Homeless Link ensured that the profile of the projects interviewed closely represented the profile of the sector as a whole. For this survey, we achieved 85% confidence intervals of  $\pm 5\%$  for the survey results from accommodation providers as a discrete group, and we achieved a 90% confidence interval of  $\pm 5\%$  from the aggregated grouping of accommodation providers and day centres. Appendix 1 provides further detail on our survey methodology.

3. Homeless England database figures on projects and bed space availability.

This database is managed by Homeless Link and holds information about homelessness services in England. Although the data is not live, it is updated regularly and considered to be the most accurate data source on homelessness services in England. Data on the availability of services and bed spaces are extracted from Homeless England, allowing a comparative analysis with previous publications of the review. Overall comparisons of accommodation projects, day centres and bed spaces can be given from 2008.

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<sup>3</sup> From 2008 to 2014 this report series was named Survey of Needs and Provision Services for Homeless Single People and Couples in England (SNAP); from 2015 to 2023 this report series was named Support for Single Homeless People in England: Annual Review.

4. Existing data on homelessness trends, including national statutory homelessness and rough sleeping figures as published by the Ministry for Housing, Communities and Local Government.

## Data accuracy

In line with all data collection since 2017, the survey asked services to provide data for the period of April 2024 – March 2025, allowing for a year-on-year comparison with the previous year's report. Changes to questions over time mean that trend comparison is not always possible. Certain questions ask for snapshot data relating to records of "last night", "last month", "last year" and within different homelessness services amounts and methods of data collection tend to vary. This means that responses to some survey questions may therefore be based on informed estimates provided by the responding organisation, rather than exact figures (Table 1.1).

**Table 1.1 Quality of data provided by respondents**

	<b>Accommodation providers</b>	<b>Day centres</b>
<b>All exact figures</b>	21%	16%
<b>Mostly exact figures</b>	61%	55%
<b>About half and half</b>	10%	11%
<b>Mostly estimates</b>	7%	18%
<b>All estimates</b>	2%	-

Source: Accommodation Provider Survey N=165; Day Centre survey N=38

Table 1.2 below reflects the distribution of accommodation providers and day centres by region. The sample size of day centres is too small to be able to provide representative regional breakdowns.

**Table 1.2 Survey response rates by region**

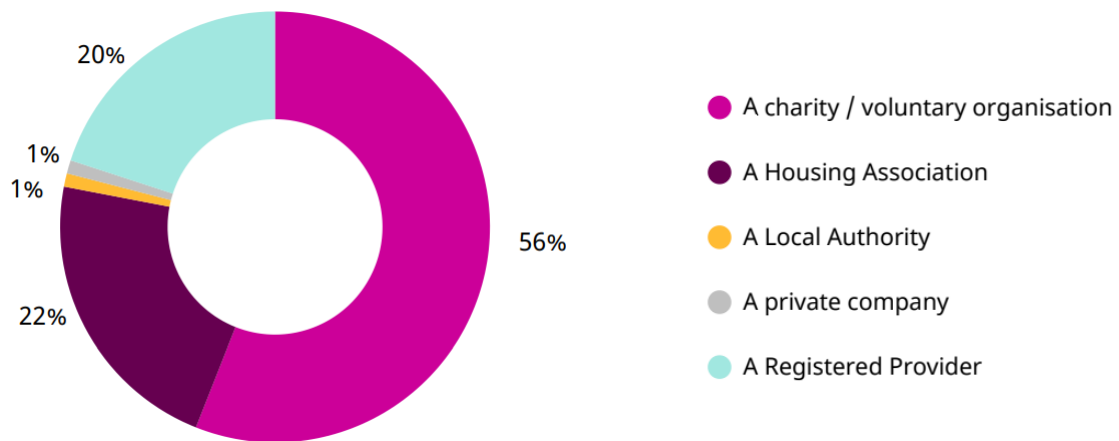
	<b>Accommodation Providers</b>		<b>Day Centres</b>	
	<b>N</b>	<b>%</b>	<b>N</b>	<b>%</b>
<b>East of England</b>	17	9%	3	7%
<b>East Midlands</b>	16	9%	1	2%
<b>London</b>	25	13%	12	29%
<b>North East</b>	9	5%	3	7%
<b>North West</b>	23	12%	7	17%
<b>South East</b>	42	22%	9	21%
<b>South West</b>	27	14%	2	5%

<b>West Midlands</b>	12	6%	3	7%
<b>Yorkshire and the Humber</b>	17	9%	2	5%
<b>Total</b>	188	-	42	-

### Accommodation provider respondents

Chart 1.1. shows the breakdown of accommodation providers that responded to the survey by type. Half of respondents were charities or voluntary organisations (56%, 104), followed by Housing Associations (22%, 41) and Registered Providers (20%, 38). A small proportion of respondents represented local authority accommodation (1%, 1) and private companies (1%, 2).

**Chart 1.1 Accommodation provider survey respondents 2025**



Source: Accommodation Provider Survey, N=186

## Chapter 2: Single homelessness in England

This chapter provides context for the 2025 report. It explores the different categories of homelessness and then looks at existing evidence on the numbers and distribution of people experiencing homelessness in England. The evidence is drawn from government figures on statutory homelessness and rough sleeping, published by the Ministry for Housing, Communities and Local Government (MHCLG)<sup>45</sup>.

### Key headlines

- 325,690 households were at risk of or experienced homelessness in 2025, a 2% decrease from 2024, and a 12% increase since 2019 when the Homelessness Reduction Act (HRA) had been in implementation for 12 months. This includes:
  - 146,370 households threatened with homelessness within 56 days and owed a prevention duty. This is a 2% decrease since 2024, and a 2% decrease from 2019 figures.
  - 179,320 households experiencing statutory homelessness and owed a relief duty. This is a 4% decrease from 2024, and a 23% increase from 2019.
- 51,240 households (35% of the total proportion owed a prevention duty) were owed a prevention duty due to the end of an assured shorthold tenancy in the private rented sector, the most common cause of prevention duty owed.
- 51,660 households (29% of the total proportion owed a relief duty) were owed a relief duty because friends and family were no longer willing or able to accommodate, the most common cause of relief duty owed.
- There was a 5% decrease from 2024 in the number of people owed a relief duty as a result of being required to leave accommodation provided by Home Office as asylum support, but an 76% increase from 2022 and 29% increase from 2023 figures .
- The 2025 rough sleeping snapshot found that 4,793 people were estimated to be sleeping rough on a given night, a 3% increase from 2024 and a 171% increase since 2010. Rough sleeping increased in most English regions, except for marginal decreases in London, East Midlands and Yorkshire & The Humber, compared with 2024.
- As of 31 December 2025, there were 134,210 households in temporary accommodation (TA), a 5% increase on the previous year and 52% increase compared to 2019. The total households in TA at the end of 2025 represents the highest number since current records began.

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<sup>4</sup> MHCLG data tables on homelessness are available at: <https://www.gov.uk/government/statistical-data-sets/live-tables-on-homelessness>

<sup>5</sup> Rough sleeping snapshot in England: Autumn 2025, available at: <https://www.gov.uk/government/statistics/rough-sleeping-snapshot-in-england-autumn-2025/rough-sleeping-snapshot-in-england-autumn-2025>

### Types of homelessness

The term 'homelessness' comprises a range of different temporary and long-term circumstances that extend beyond sleeping rough or being housed in temporary accommodation by a local authority. The legal definition of homelessness derives from the Housing Act 1996 and states that an individual is classified as 'homeless' if they do not have accommodation that: (a) they can legally occupy, (b) is accessible to them, (c) is 'physically available to them (and their household), and (d) is reasonable for them to live in.

#### **Statutory homelessness**

The term 'statutory homelessness' refers to households — classified as either families (those with dependents) or individuals (single homelessness) — that have a legal entitlement to a homelessness duty by their local authority. Until the introduction of the Homelessness Reduction Act in 2018 this was limited to those owed a Main Duty, and were therefore deemed to be both unintentionally homeless and in priority need. This included anyone who was: pregnant; living with dependent children; homeless as a result of fire, flood or other disaster; aged under 18, a care leaver aged 18 to 20; and/or assessed as vulnerable.<sup>6</sup> The Domestic Abuse Act 2021 introduced people who are made homeless as a result of fleeing domestic abuse as an additional priority need category.<sup>7</sup>

The vulnerability assessment includes those with physical disabilities and mental health needs. However, assessments for vulnerability meant that decisions were at local authority discretion and led to many single homeless applicants being excluded from statutory support.

One of the goals of the introduction of the Homelessness Reduction Act (HRA) was to address the inconsistency in access to support for single people experiencing or at risk of homelessness. Expanding the statutory duties on local authorities ensured that support was provided regardless of priority need decisions. Eligibility entitlements based on immigration status still apply to all duties under the HRA.

The HRA introduced three duties under which a local authority must grant applicants accommodation and/or support:

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<sup>6</sup> The Homelessness (Priority Need for Accommodation) (England) Order 2002, extended the definition of 'vulnerable' to include: mental health problems; physical or learning disabilities; old age; leaving prison or the Armed Forces; care leavers; being at risk of violence (or threats of violence); other special reasons.

<sup>7</sup> s.189(1)(e) Housing Act 1996 as inserted by s. 78 Domestic Abuse Act 2021.

**Prevention duty:** Local authorities must help prevent households deemed to be threatened with experiencing homelessness in the next 56 days from becoming homeless. If, during this period, the household experiences homelessness, they will be moved to a relief duty.<sup>8</sup>

**Relief duty:** Local authorities 'must take reasonable steps' to relieve homelessness within 56 days, primarily through securing alternative accommodation.<sup>9</sup>

**Main duty:** If, at the end of the 56 day relief duty period, a household is: (a) still deemed to be homeless, (b) in priority need, (c) eligible for assistance, and (d) not intentionally homeless, they are entitled to accommodation from the local authority. The local authority should conduct an assessment and provide temporary accommodation until more permanent accommodation can be provided.<sup>10</sup>

### Single homelessness<sup>11</sup>

This term covers individuals or couples without dependent children who are homeless. People experiencing homelessness within this category are less likely to meet the priority need criteria of homelessness legislation (see above) and therefore often do not qualify under the main duty of the HRA which would guarantee them housing under local authority statutory duty. As mentioned above, being considered 'vulnerable' is particularly significant for single homeless people, as it is the primary way they are found to be in priority need. Consequently, this population are often not eligible for statutory temporary accommodation despite frequently experiencing some of the most extreme forms of homelessness, including rough sleeping. There is however a substantial network of services and support that are focussed specifically on supporting this population, which although often integrated with local authority provision often sits outside of the statutory homelessness offer.

This report explores how these homelessness support services provide an alternative source of support for single homeless people in these circumstances. Many people experiencing single homelessness will stay in supported accommodation and/or short term accommodation (e.g. hostels, shelters and temporary supported

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<sup>8</sup> This is defined in Section 195 of the 1996 Act. Available here:

<https://www.legislation.gov.uk/ukpga/2017/13/section/4#section-4-2>

<sup>9</sup> This is defined in Section 189B of the 1996 Act. Available here:

<https://www.legislation.gov.uk/ukpga/2017/13/section/5#section-5-2>.

<sup>10</sup> See DLUHC's Homelessness data: notes and definitions (2018). Available at:

<https://www.gov.uk/guidance/homelessnessdata-notes-and-definitions>

<sup>11</sup> The term 'single homelessness' is a commonly used term in the homelessness sector. It does not denote relationship status and is shorthand for 'people who have no dependent children in their household and who are not owed a statutory homelessness duty by a local authority.' The term can cover couples. Throughout this report we refer to single homelessness, and single homeless people. In both cases, this is the group to which we refer.

accommodation) provided by the voluntary homelessness sector, while others may end up trapped in street homelessness or end up 'hidden' from the system.<sup>12</sup>

### Hidden homelessness

Due to difficulties accessing support, personal circumstances, or lack of understanding about the support available, many single homeless people end up what is termed 'hidden homeless'. Living in squats, sleeping on someone's floor, sofa-surfing with friends, sleeping on night buses/underground trains/airports or sleeping rough in concealed locations, these individuals are often not 'visible' on the streets or to services and as a result will not receive the advice and support that they need.<sup>13</sup> Although the introduction of the Relief Duty through the HRA means that since 2018 many of these people are entitled to some statutory support, this is a population that is traditionally less visible and, as a result, more likely to be disengaged from services and support.

The lack of visibility means that people experiencing hidden homelessness are less likely to be captured in official statistics, making an accurate capture of the scale of hidden homelessness difficult. However, there are increasing data available to help better understand the hidden homeless population.<sup>14,15</sup>

### Rough sleeping

The term 'rough sleeping' refers to the experience of people who sleep outside or in buildings or places that are unfit for human habitation (e.g., car parks, cars, stations, doorways). Rough sleeping is the most visible form of homelessness and is a dangerous and isolating experience that has a severely detrimental impact on an individual's physical and mental health and life expectancy.<sup>16</sup>

To estimate the numbers of people sleeping rough in England on any given night, local authorities conduct an annual snapshot estimate to approximate rates and trends in rough sleeping across the country. The current methodology for the rough sleeping snapshot was introduced in 2010 and uses a specific and defined definition of what rough sleeping means: *'People sleeping, about to bed down (sitting on/in or standing next to their bedding) or actually bedded down in the open air (such as on the streets, in tents, doorways, parks, bus shelters or encampments). People in buildings or other*

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<sup>12</sup> Crisis (2017) Moving on: Improving Access to Housing for Single Homeless People in England, [https://www.crisis.org.uk/media/237833/moving\\_on\\_2017.pdf](https://www.crisis.org.uk/media/237833/moving_on_2017.pdf)

<sup>13</sup> Reeve, K. and Batty, E. (2011) The hidden truth about homelessness. Experiences of single homelessness in England, [https://www.crisis.org.uk/media/236815/the\\_hidden\\_truth\\_about\\_homelessness.pdf](https://www.crisis.org.uk/media/236815/the_hidden_truth_about_homelessness.pdf)

<sup>14</sup> ONS (2023) "Hidden" homelessness in the UK: evidence review. Available at: <https://www.ons.gov.uk/peoplepopulationandcommunity/housing/articles/hiddenhomelessnessintheukevidencereview/2023-03-29>

<sup>15</sup> DLUCH. (2020). English Housing Survey 2018 to 2019: sofa surfing and concealed households - fact sheet. Available at: <https://www.gov.uk/government/statistics/english-housing-survey-2018-to-2019-sofa-surfing-and-concealed-householdsfact-sheet>

<sup>16</sup> Aldridge R.W., et al. (2019). Causes of death among homeless people: a population-based cross-sectional study of linked hospitalisation and mortality data in England. *Wellcome Open Res*, 4(49)

*places not designed for habitation (such as stairwells, barns, sheds, car parks, cars, derelict boats, stations, or “bashes”)*.

The snapshot approach is not intended to provide a complete figure of the number of people rough sleeping in England and is by definition a best estimate count of street homelessness. In conducting these estimates, local authorities are expected to consult with local agencies, such as the police, voluntary sector, and outreach teams, to ensure they have the most accurate information on who is likely to be sleeping rough on a given night and where they are likely to be found.

### **Rough sleeping and homelessness policy context**

Anticipation of the new homelessness strategy overshadowed much of 2025, as the first chance to see this Labour Government’s approach and commitments to tackling homelessness and rough sleeping. The strategy, a National Plan to End Homelessness, was not published until December 2025 which meant that for most of the year there was relatively little by way of broad policy changes although an expectation of change coming down the track.

This was coupled with a level of concern for the pending financial cliff edge that was looming in March 2026 when the existing funding settlement would end. Although Treasury confirmed in the Comprehensive Spending Review that the envelope for homelessness spending would remain the same, the detail of what that funding would look like, how it would be allocated, and what the implications were for service providers across the country was not revealed until the end of 2025 through the Autumn Budget, the new homelessness strategy, and the Local Government Financial Settlement. Alongside this the sector was contending with the anticipation of incoming regulation of most homelessness accommodation via the Supported Housing Regulatory (Oversight) Act, with the uncertainty of what this will mean in practice, and concern over the financial burden of regulation. With the addition of incoming or already implemented changes impacting the sector via the Renters Rights Act, the Social Housing Act, and Ofsted Regulation, although there was little by way of significant policy announcements in 2025 there was a cloud of uncertainty and anticipation over much of the year, whilst dealing with the knowledge that substantial change was coming, but not knowing the detail of how this would play out.

However, one area of significant movement was around changes to the move-on period for non-UK nationals, with continued challenges driven by the Home Office’s Streamlined Asylum Process. The pilot scheme, which extended the period successful asylum seekers had to leave Home Office accommodation from 28 days to 56 days had been due to run until the end of 2025. Unfortunately, from September 2025, the Government U-turned and prematurely ended the pilot for most single adults, meaning they reverted to 28 days notice. However, the 56-day period was retained for families and single people classed as ‘vulnerable’ - individuals who are pregnant, over the age of 65 or have a known/evidenced disability, as defined by the 2010 Equality Act.

The pilot ended in March 2026, and the Government has now set the notice period for all individuals granted leave exiting the asylum accommodation estate at 42 days, from the point they are notified of a positive asylum decision.

Rough sleeping estimates reached a record high in 2025. Despite this, there is regional variation which shows the impact of local initiatives and local political leadership in reducing homelessness. For example, London has seen a decrease in the number of people found to be rough sleeping on a given night. This is likely due to the Mayor's Rough Sleeping Plan of Action and the efforts of exemplary local services.

The publication of the new homelessness strategy in December 2025 brought in new targets to reduce long-term rough sleeping within this Parliament. In order to achieve this cross-government target, the Government announced:

- a new £15m Long-Term Rough Sleeping Innovation Programme to enable councils with the greatest pressure to deliver more personalised and comprehensive support for people with complex needs
- introduction of Long-Term Rough Sleeping Partnership Plans for areas with high numbers of people rough sleeping long term
- £37m for the Ending Homelessness in Communities Fund

The creation of joint cross-government targets have also been introduced with the aim to reduce the numbers of people leaving institutions into homelessness, including halving the number becoming homeless after leaving prison and ensuring no eligible person is discharged from hospital to the streets.

Alongside the new strategy, Government also announced substantial changes to homelessness funding, from April 2026, with the introduction of the Homeless, Rough Sleeping and Domestic Abuse grant. Awarded to Local Authorities by direct allocation this Grant brings together all the main homelessness and rough sleeping funding sources including Homelessness Prevention Grant, Rough Sleeping Prevention and Recovery Grant (formerly Rough Sleeping Initiative), and the Rough Sleeping Accommodation Programme. It will form a consolidated, ring fenced pot of funding for local councils with certainty of budget over a three year cycle. As part of this funding reform spending on temporary accommodation has been separated out with the aim to address the tension that forces local authorities to choose between investment in prevention and meeting temporary accommodation costs.

It will be interesting to see whether the 2026 Support to End Homelessness data collection captures the early impact of the new programmes, funding packages and policy changes set out in the homelessness strategy to reduce and prevent rough sleeping.

## Homelessness trends

For a range of reasons, it has been challenging to measure and assess homelessness trends in England. This includes the lack of a clear, consistent definition of homelessness, the use of a variety of different approaches to measuring single homelessness, and the wide prevalence of hidden homelessness.

The HRA presented a vital opportunity in our ability to estimate the scale of homelessness and, in particular, single homelessness. This change in legislation led to the replacement of the P1E data returns with a new system – the Homelessness Case Level Information Collection (H-CLIC) in April 2018. The shift in the definition of homelessness beyond those in priority need has greatly expanded our ability to assess the scale of single homelessness, however it does mean that most of our trend data now starts in April 2018 and is not comparable with historic data.

The statutory statistics collected by MHCLG include a much greater level of detail on the reasons people are experiencing (or at risk of) homelessness, their support needs, their length of time in temporary accommodation, and the outcomes of prevention duties.

However, it is still vital to note that whilst this data helps us understand the wider trends, it does not tell us about those not engaging with support, people experiencing more hidden forms of homelessness, or those not entitled to support because of immigration restrictions.

### Statutory homelessness<sup>17</sup>

According to the Ministry for Housing, Communities and Local Government's (MHCLG) annual statutory statistics for January - December 2025, 325,690 households were at risk of or experienced homelessness during this period and were owed either a prevention or relief duty.<sup>18</sup> This represents a 2% decline since 2024, but a 12% increase from 2019; the first full year in which the HRA was in effect.<sup>19</sup>

#### Prevention duty

In 2025, 146,370 households were threatened with homelessness within 56 days and owed a prevention duty. This is a 2% decrease since 2024 and a 2% decrease from 2019 figures. Whilst this reduction in the number of households at risk of homelessness may look encouraging, it must be understood in the context of a significant increase in households owed a relief duty over the same period, and therefore may suggest instead that households are accessing help at a later stage.

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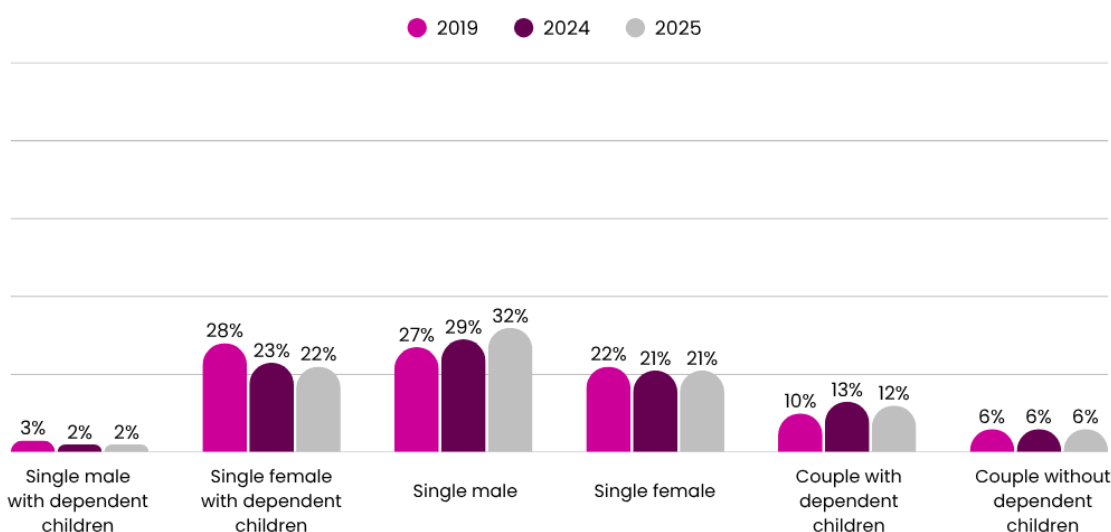
<sup>17</sup> Note unless otherwise specified all statutory homelessness statistics in this section refer to the full calendar year not the financial year.

<sup>18</sup> MHCLG (2026) Statutory homelessness live tables. Available here: <https://www.gov.uk/government/statistical-data-sets/live-tables-on-homelessness>

<sup>19</sup> MHCLG (2026) Statutory homelessness live tables. Available here: <https://www.gov.uk/government/statistical-data-sets/live-tables-on-homelessness>

The profile of households owed a prevention duty has remained consistent with 2024, with single males without dependents making up the highest proportion of households (46,590, 32%), followed by single female parents (31,690, 22%), and single females without dependents (31,360, 21%). Compared with 2019, there have been some changes to the profile of those owed a prevention duty, at which time single female parents made up the largest proportion (28%). Chart 2.1 below sets out the changing profile of those owed a prevention duty between 2019 and 2025.

**Chart 2.1. Profile of households owed prevention duty: 2019, 2024, 2025**



Source: MHCLG (2026) Statutory homelessness live tables

Of those owed a prevention duty, the most common reason was due to the end of an assured shorthold tenancy (AST) in the private rented sector, with this reported by 51,420 households making up 35% of the total proportion owed the duty in 2025. This marks a 13% decrease since 2024, but a 15% increase from 2019. Breaking down the reasons for the end of an AST:

- 32,890 households were owed a prevention duty because their landlord was selling or re-letting the property. This is a 14% decrease from 2024 and a 30% increase since 2019.
- 7,460 households were at risk of homelessness due to rent arrears, a 10% decrease since 2024 and a 45% decrease from 2019.
- Within this, there has been a 42% decrease from 2024 of people in rent arrears due to an increase in rent, and a 60% increase since 2019.
- Of those at risk of homelessness due to the end of an AST, 24,130 households had a valid section 21 notice, an 11% decrease from 2024, and a 24% increase since 2019.

It is worth noting that this will be the last full year of statutory data on prevention duties owed as a result of section 21 notices as the Renters Right Act 2025<sup>20</sup>, which came into effect on 1<sup>st</sup> May 2026, abolishes Section 21 'no fault' evictions. Given the high number of those at risk of homelessness in 2025 with a section 21 notice, it will be interesting to track the impact of the abolition in reducing and preventing statutory homelessness in 2026.

143,680 households ended their prevention duty in 2025. This is a 1% increase on 2024, and a 4% increase compared to 2019. In 2025, of those whose prevention duty ended, 76,340 households had a positive outcome and secured accommodation for 6+ months. When looking comparatively at successful outcomes, in 2025, 53% of prevention duties ended in secured accommodation, a very minor increase from 52% in 2024, but a decline from the successful prevention outcomes of 58% in 2019. Aligned with this, 37,120 households ended their prevention duty homeless, a 1% decrease from 2024 and a 27% increase from 2019. This also represents a proportional increase of the total number of duties ended from 20% in 2019, to 26% in 2025.

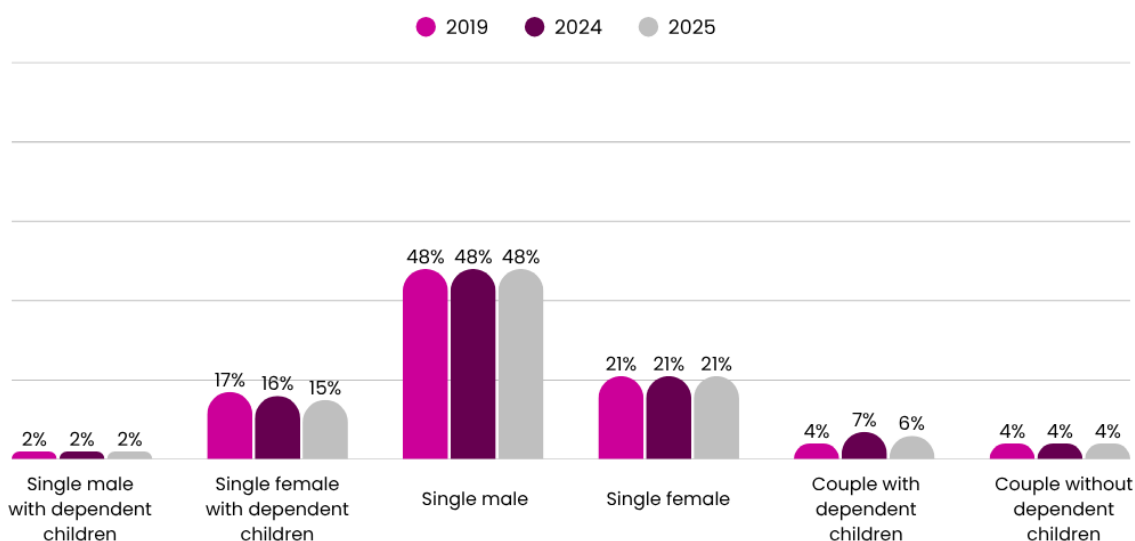
### **Relief duty**

In 2025, 179,320 households were experiencing statutory homelessness and owed a relief duty. This is a 4% decrease from 2024, and a 23% increase from 2019. The profile of households owed a relief duty has remained relatively consistent with the previous year with single males without dependents making up the highest proportion of households by a substantial margin (86,630, 48%). Single females make up the next largest group owed a relief duty (38,320, 21%), followed by single females with dependent children (27,760 15%).

### **Chart 2.2 – Profile of households owed relief duty: 2019, 2024, 2025**

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<sup>20</sup> Homeless Link. Spotlight: The Renters' Rights Act 2025. Available at: <https://homeless.org.uk/areas-of-expertise/improving-homelessness-services/supporting-innovation-in-homelessness-services/spotlight-the-renters-rights-act-2025/>



Source: MHCLG (2026) Statutory homelessness live tables

Of those owed a relief duty, the most common reason was friends or family no longer willing or able to accommodate, at 51,660 households making up 29% of the total proportion owed the duty. This is a 7% decrease from 2024 and a 27% increase from 2019. Experiencing homelessness as a result of domestic abuse was the next main reason given, at 29,340 households (16% of those owed relief duty). This is a 2% increase on 2024 and an 42% increase on 2019. The third most common reason was due to the end of an AST, at 20,480 households (11% of those owed relief duty), a 12% decrease from 2024 and a 29% increase from 2019.

Eviction from asylum support continues to be a prevalent and significant reason for being owed a relief duty. In 2025, 13,890 households were owed a relief duty as a result of being required to leave accommodation provided by the Home Office as asylum support. This is a 5% decrease compared to 2024 (14,560 households), and an 76% increase from 2022 (3,390 households) and 29% increase from 2023 (9,800). August 2023 marked the changes to the asylum move-on period (to 28 days) and resulted in a surge in the number of households owed statutory homelessness support after leaving Home Office accommodation.

213,390 households ended their relief duty in 2025. Of those, 70,730 households (33%) had a positive outcome and secured accommodation for 6+ months. This is a 16% increase from 2019, and a 5% increase on the previous year. In 2025, 33% of relief duties that ended resulted in secured accommodation, compared with 30% in 2024, and 40% in 2019. In contrast, 105,880 households (50%) ended their relief duty still homeless at the point that 56 days elapsed, an 8% decrease from 2024 and a 48% increase from 2019. This is also an increase in terms of proportions, from 37% of the total number of duties ended in 2019 to 50% in 2024.

## Rough sleeping

Local authorities in England carry out an annual snapshot count or estimate of the number of people sleeping rough on a single 'typical' night in Autumn (October to November). These statistics provide a snapshot figure of those sleeping rough across local authorities in England. Local authorities decide which approach to use to determine the number of people sleeping rough in their local area on a single night.<sup>21</sup> All of the available methods record only those people seen, or thought to be, sleeping rough on a single 'typical' night. They do not include everyone in an area with a history of sleeping rough, or everyone sleeping rough in areas across the October-November period.

In Autumn 2025, there was an increase in the number of rough sleepers for the fourth year in a row, with 4,793 people counted or estimated by local authorities to be sleeping rough.<sup>22</sup> Rough sleeping has now reached a new record high, representing a 3% increase from the previous year, and an 171% increase since the current methodology for measuring rough sleeping was introduced in 2010.

**Table 2.1 Annual comparison of rough sleeping in England, 2024–2025**

	Number of rough sleepers	Numerical change (with 2025)	% change (with 2025)
<b>2010</b>	1,768	+3,025	171%
<b>2011</b>	2,181	+2,612	120%
<b>2012</b>	2,309	+2,484	108%
<b>2013</b>	2,414	+2,379	99%
<b>2014</b>	2,744	+2,049	75%
<b>2015</b>	3,569	+1,224	34%
<b>2016</b>	4,134	+659	16%
<b>2017</b>	4,751	+42	1%
<b>2018</b>	4,677	+116	2%
<b>2019</b>	4,266	+527	12%
<b>2020</b>	2,688	+2,105	78%
<b>2021</b>	2,443	+2,350	96%
<b>2022</b>	3,069	+1,724	56%

<sup>21</sup> Details on the approach options for the rough sleeping count are available here: <https://www.gov.uk/government/statistics/rough-sleeping-snapshot-in-england-autumn-2025/rough-sleeping-snapshot-in-england-autumn-2025#snapshot-approach>

<sup>22</sup> MHCLG (2026). Rough sleeping snapshot in England: autumn 2025. Available at: <https://www.gov.uk/government/statistics/rough-sleeping-snapshot-in-england-autumn-2025/rough-sleeping-snapshot-in-england-autumn-2025>

<b>2023</b>	3,898	+895	23%
<b>2024</b>	4,667	+126	3%
<b>2025</b>	4,793	-	-

Source: Rough sleeping snapshot autumn 2025

### Regional trends in rough sleeping

There are regional variations in the numbers of people seen sleeping rough. As seen in Chart 2.3 below, rough sleeping has increased across most regions, including the East, North East, North West, South East, South West and the West Midlands. London, the East Midlands and Yorkshire & The Humber have all seen slight decreases.

**Chart 2.3. Regional change in rough sleeping count, 2024 and 2025**



Source: Rough sleeping snapshot autumn 2025

In terms of overall distribution of rough sleeping across England, as seen in Table 2.2 below, London (27%), the South East (17%) and the South West (12%) reported the highest proportion of rough sleeping, with the North East (3%) reporting the lowest proportion of rough sleeping in England.

**Table 2.2. Proportion of rough sleeping in England by region, 2025**

<b>East</b>	9%
<b>East Midlands</b>	8%
<b>London</b>	27%
<b>North East</b>	3%
<b>North West</b>	9%
<b>South East</b>	17%
<b>South West</b>	12%
<b>West Midlands</b>	8%
<b>Yorkshire &amp; the Humber</b>	7%

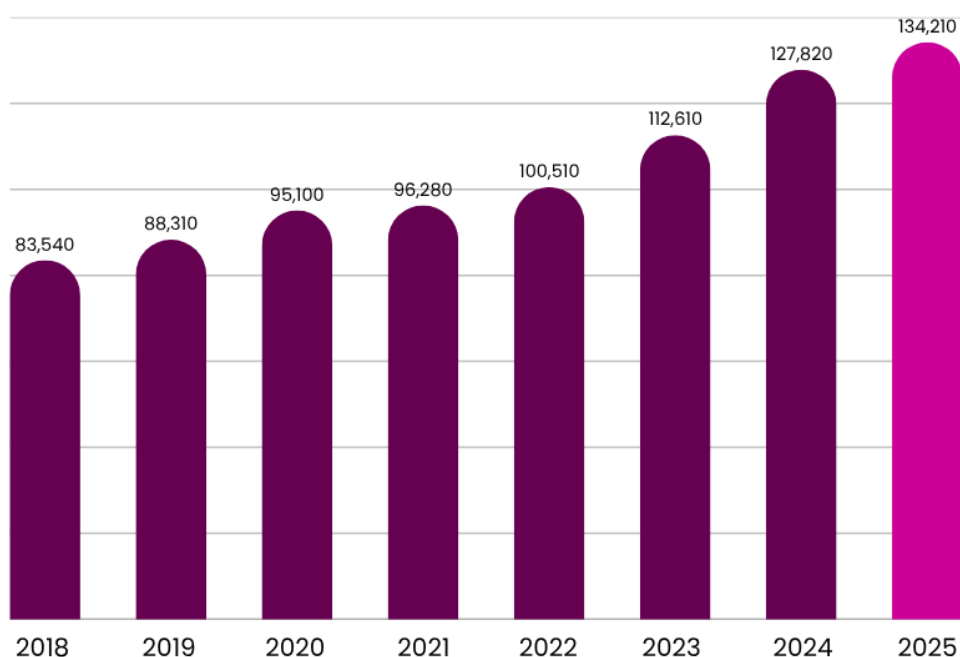
Source: Rough sleeping snapshot autumn 2025

## Temporary accommodation

Local authorities have a duty to accommodate any household who is in priority need. Temporary accommodation (TA) may be provided for as long as it takes to find permanent housing. Local authorities may also provide emergency accommodation whilst they are looking into a housing situation pending decision on priority need and main duty decision. Not everyone owed a prevention or relief duty will be given temporary accommodation by their local authority as part of their statutory support.<sup>23</sup>

As of 31 December 2025, there were 134,210 households in temporary accommodation, a 5% increase on the previous year, and a 52% increase compared to 2019. Chart 2.4 below sets out the number of households in TA as of 31 December since the introduction of the HRA. The total households in TA at the end of 2025 represents the highest number since current records began.

**Chart 2.4. Total households in temporary accommodation 2018–2025**



Source: MHCLG (2026) Statutory homelessness live tables

For the third year in a row, most households in TA were accommodated in nightly paid, private lets (50,410 households) with the majority of these households being families with dependent children (34,780 households). This is one of the most costly and disruptive forms of temporary accommodation. Use of local authority or Housing

<sup>23</sup> Shelter (2023) Temporary housing when homeless. Available here: [https://england.shelter.org.uk/housing\\_advice/homelessness/temporary\\_housing\\_when\\_homeless](https://england.shelter.org.uk/housing_advice/homelessness/temporary_housing_when_homeless)

Association stock is the second most common form of TA (33,210 households, of which 22,720 had dependent children), closely followed by PRS (27,140 households, of which 20,080 had dependent children). 12,550 households were in B&Bs, which marks a reduction since the previous peak in 2024 of 16,380 households. One of the immediate actions on TA as set out in the new homelessness strategy is the target to eliminate the use of B&Bs for families, other than very short-term use in emergencies by the end of this parliament. Whilst the progress here is welcome, there is a long way to go in order to meet this target. 43,040 households had been accommodated in TA outside of their local authority area, a 5% increase on 2024.

## Chapter 3: Availability and access to homelessness services

This chapter explores the availability of accommodation services and day centres in England. Drawing on findings from analysis of the Homeless England database and the survey of services across England, it discusses key characteristics of existing provision and changes in provision over the past year.

### Key headlines

- In 2025, there are 942 accommodation projects for single homeless people in England.
- The number of accommodation projects has slightly increased, by 3%, from last year but sits at 25% lower than a decade ago in 2015, and 46% lower than 2008 when this data series began.
- There are 34,451 bedspaces in England, an increase of 4% from 2024, but a 6% decrease from 2015, and a 41% decrease since 2008.
- 77% of accommodation projects reported having to turn someone away from their service because the clients' needs were too high or too complex.
- 82% of accommodation projects are mixed gender, with 10% men only and 9% women only.
- 37% (351) of accommodation projects are youth specific services.
- 8% (56) of accommodation projects are able to support people with high or complex needs.
- A total of 172 day centres operate throughout England as of 2025. This is a very slight decrease in day centres compared to 2024 (173) but an increase from the number operating in 2023 (168).

### Definitions

Homelessness provision is described in various ways, and accommodation providers and day centres differ in size and in the level and nature of support offered. The following definitions cover the key features of both forms of provision:

- **Accommodation providers** provide both short and long-term accommodation and generally aim to support people to prepare for independent living. Examples of accommodation projects include foyers, supported housing schemes, and hostels. The level of support, access criteria, and target groups vary between projects. Those able to live independently may be placed in accommodation with lower levels of support, while those with other types of support needs may need to live in accommodation that provides support to meet these needs.

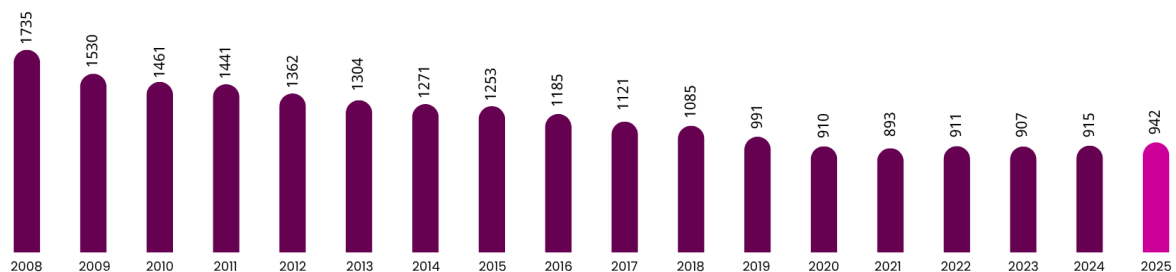
- **Day centres** offer non-accommodation-based support for those sleeping rough and/or who are either experiencing or at risk of other forms of homelessness. Day centres are usually provided and run by voluntary, faith, or community organisations<sup>24</sup> and have often emerged in response to a local need.

## Availability of homelessness accommodation services

Homeless Link has been tracking the availability of homelessness accommodation services since 2008, following the announcement that the Supporting People ringfence would be lifted.

Data from the Homeless England database identifies 942 accommodation projects for single people who are homeless in England in 2025, representing a small increase of 3% from the previous year’s figure of 915. The number of accommodation projects in 2025 is 25% lower compared to 10 years ago in 2015, and 46% lower than in 2008 when this data series began. The data suggests that after a long period of reduction in the number of accommodation providers since 2008, this decrease has stalled and numbers have stayed relatively static since 2020. This year’s figure represents the highest level of provision recorded in the last 5 years.

**Chart 3.1. Number of accommodation providers, 2008 – 2025**

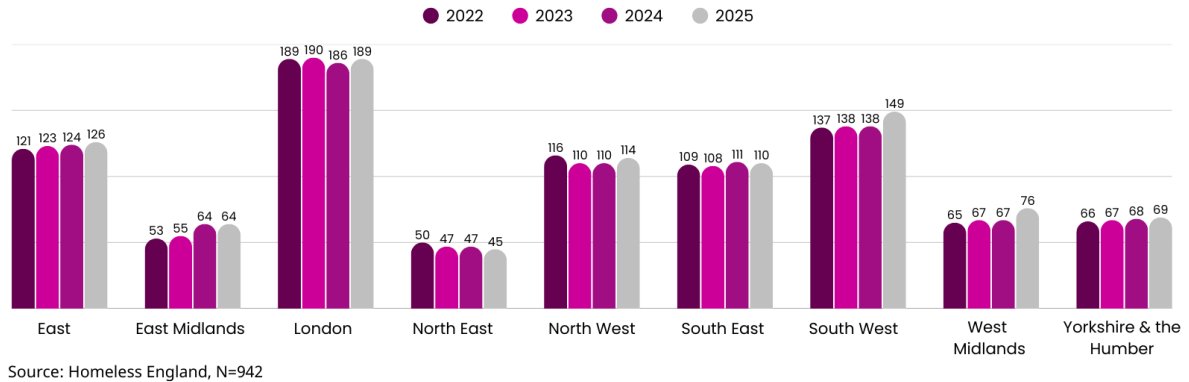


Source: Homeless England, N=942

As seen in Chart 3.2 below, the number of accommodation providers by region has seen some slight change between 2024 and 2025. Most regions have seen a marginal increase in their provision, with the South West and the West Midlands seeing the biggest changes. The North East has seen a slight decrease in the number of accommodation providers compared to the previous year and is at its lowest number since 2022.

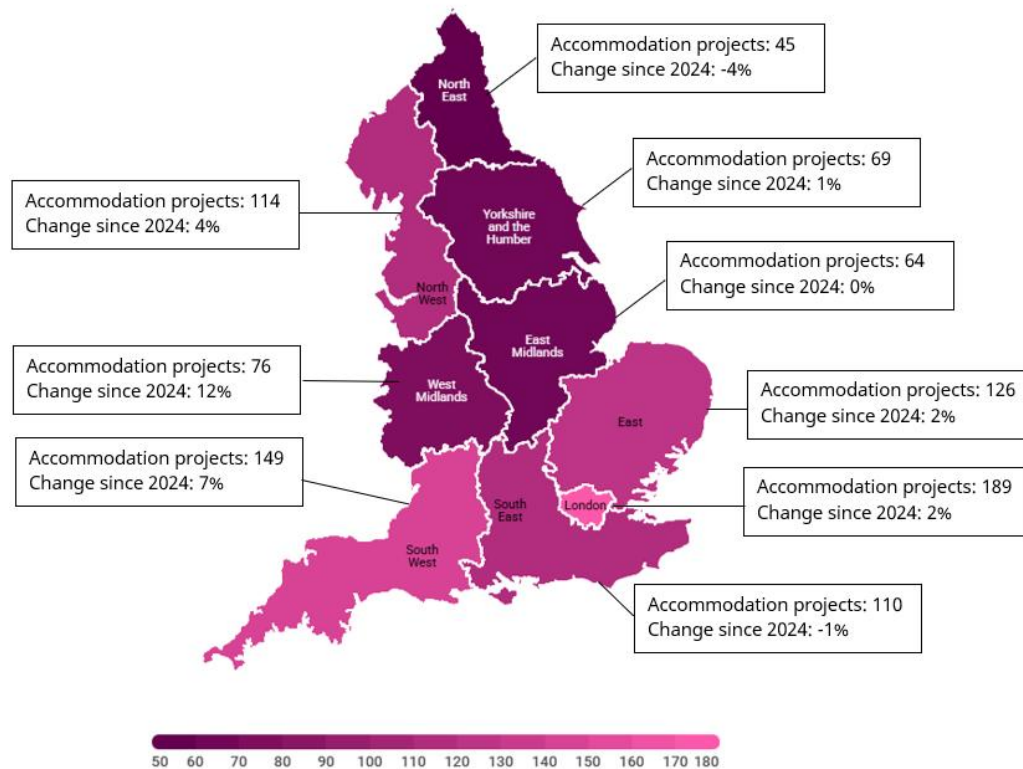
**Chart 3.2 Change in number of accommodation providers by region, 2022–2025**

<sup>24</sup> Findings from a survey of 124 day centres, showed that the majority were run by voluntary sector homelessness organisations (43%) or religious organisations (27%). <https://www.kcl.ac.uk/scwru/pubs/2005/Crane-et-al-2005-Homeless.pdf>



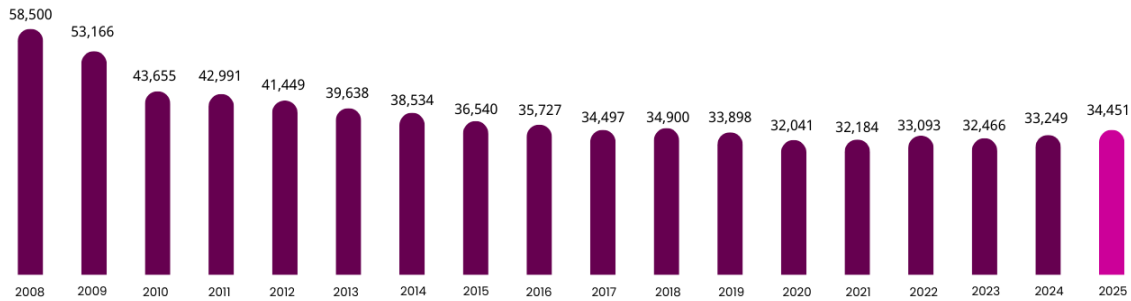
Map 3.1 below shows the geographical distribution of accommodation projects across England.

**Map 3.1. Regional distribution of homelessness accommodation projects, 2025**



As seen in Chart 3.3 below, there are 34,451 bedspaces in England in 2025, a marginal 4% increase from the previous year in 2024. This reflects the slight uptick in the number of accommodation projects reported above, however the longer term context remains one of decline, with this year’s figure representing a 6% decrease from 10 years ago in 2015 and a 41% decrease since 2008.

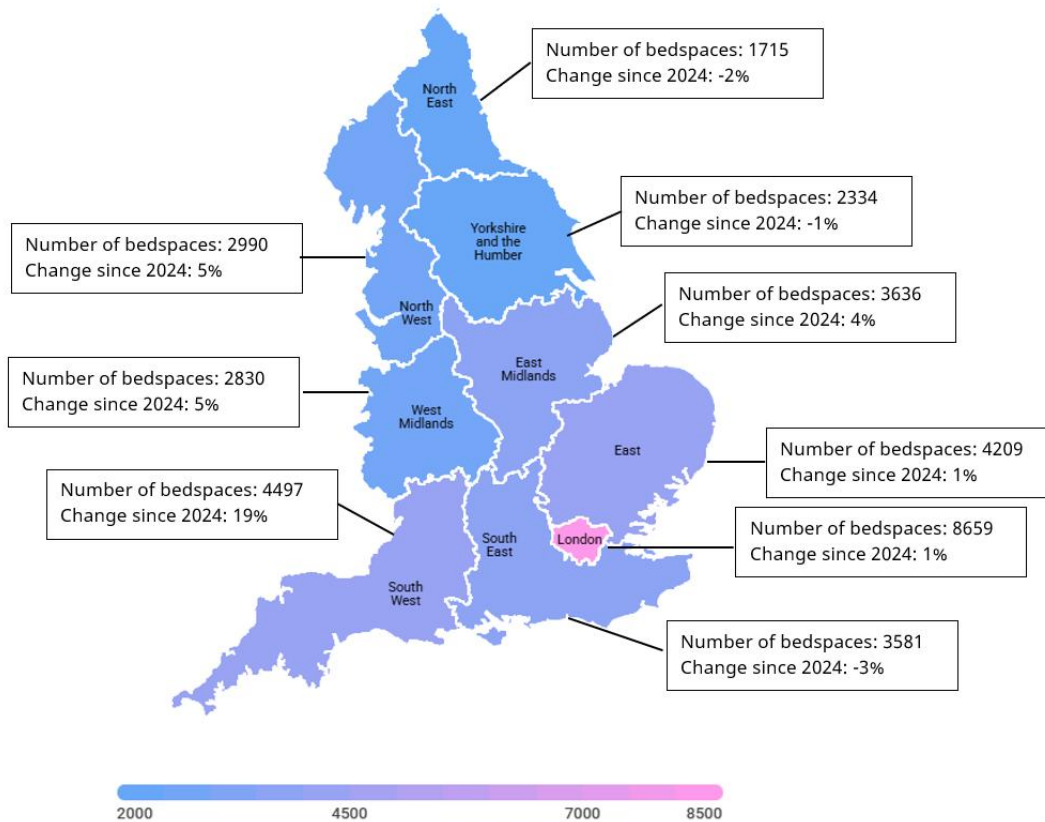
**Chart 3.3 Number of bedspaces available in England, 2008 – 2025**



Source: Homeless England, N=942

Map 3.2 below shows the regional distribution of bedspaces. In the majority of regions the number of bedspaces between 2024 and 2025 have increased, with the exception of the North East, South East and Yorkshire and the Humber who all saw slight percentage decreases in bedspace capacity.

**Map 3.2. Regional distribution of bedspaces, 2025**

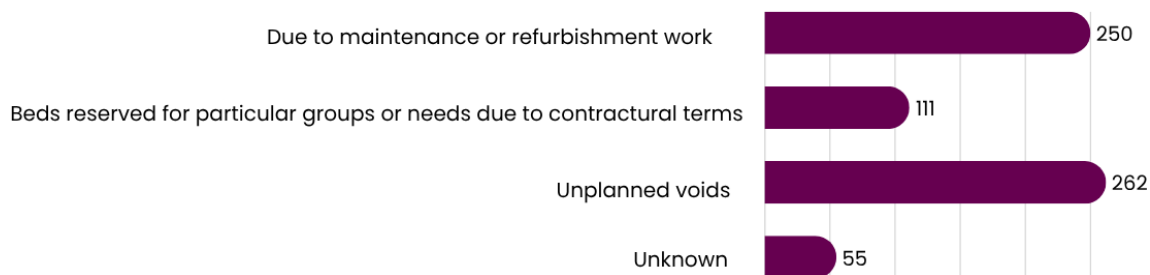


**Bed night voids**

To create a picture of the level of demand, the accommodation provider survey asked respondents whether they had any voids (empty beds). 184 projects (98% of respondents) reported a total of 677 voids. This represents 8% of reported available bedspaces that night. As per previous findings, this suggests that providers are running at high capacity.

The reason for voids can vary, ranging from planned voids due to maintenance or refurbishment, beds being reserved for specific groups or needs based on contractual obligations or unplanned voids. Chart 3.4 below illustrates the total number of voids based on these reasons. The most cited reason for voids was unplanned voids (262, 39%).

**Chart 3.4. Reasons for voids**



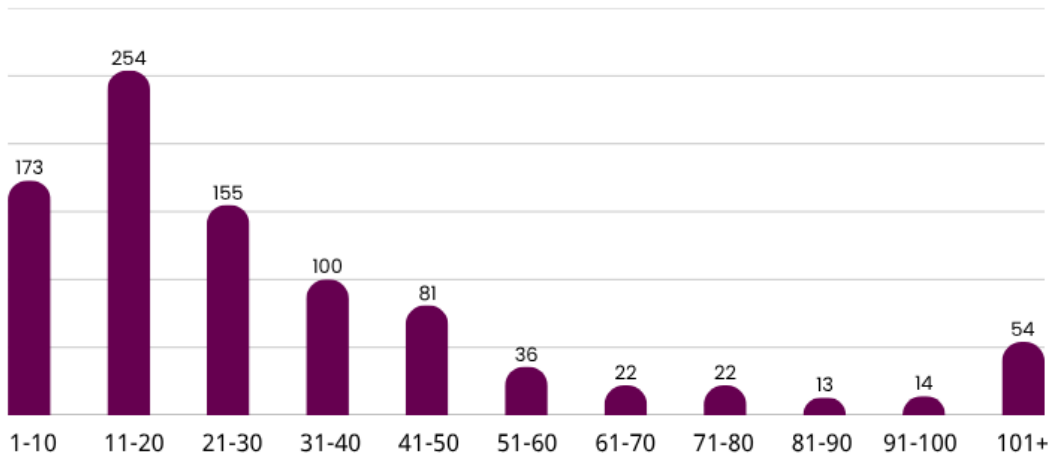
Source: Accommodation Providers Survey, N=184

## Size of accommodation projects

In 2025, 46% of accommodation projects provided up to 20 bedspaces within their service. 17% of accommodation projects provided over 50 bedspaces within their service. There is an average of 23 bedspaces per provider.<sup>25</sup>

**Chart 3.5. Accommodation projects by maximum bedspace capacity**

<sup>25</sup> 23 is the median number of bedspaces. The mean is 37 and is impacted by a small number of larger scale providers.

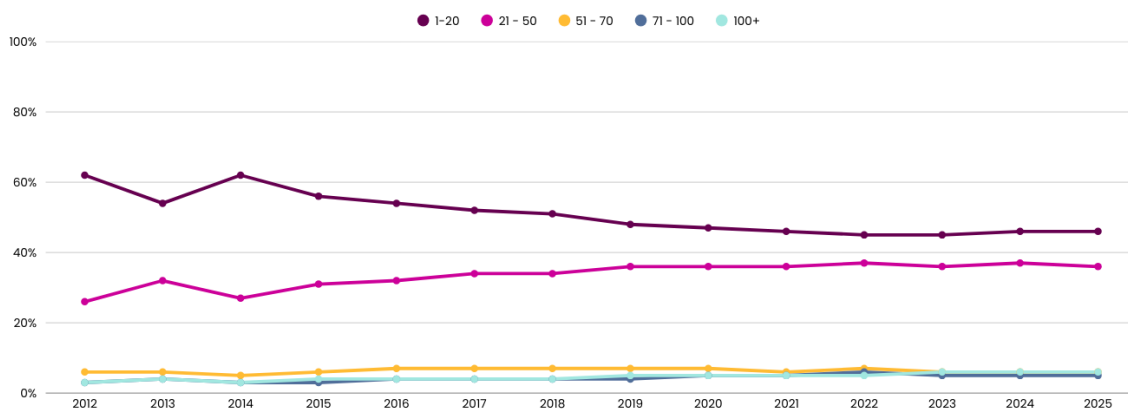


Source: Homeless England, N=924

Since the 1980s, homelessness accommodation projects have followed a general trend of downsizing accommodation provision into smaller scale projects with a recognition that smaller projects can offer a more personalised approach.<sup>26</sup> This aligns with more recent practice developments including trauma-informed approaches and Psychologically Informed Environments.<sup>27</sup>

As seen in Chart 3.6 below, since 2014 there is a general gradual upward trend in the proportion of medium sized projects (between 21 – 50 bed spaces), while a downward trend is seen in the proportion of small projects (between 1 – 20 bed spaces). This seems to align with changes in the main sources of funding for accommodation projects since 2014, where there is a decline in local authority commissioned contracts and a rise in the use of Housing Benefit as a primary source of income suggesting a relationship between funding source and the types of services being delivered (see Chapter 5).

**Chart 3.6. Accommodation projects by size, 2012 – 2025**



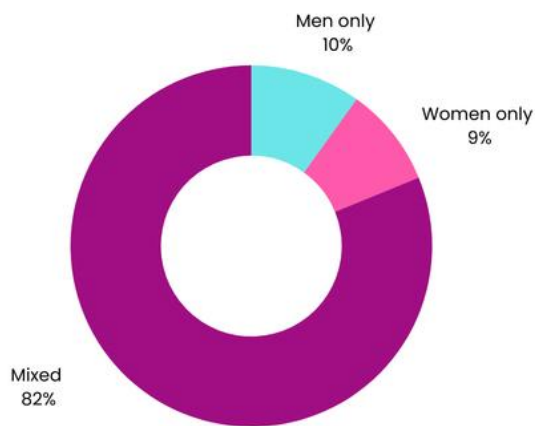
Source: Homeless England, N=924

## Availability of accommodation for specific populations

### Gender

In 2025, 809 (82%) accommodation projects offered mixed gender accommodation, whilst 95 (10%) projects offered male only accommodation and 86 (9%) projects offered female only accommodation. Gender provision among accommodation providers has remained static since 2024, with a very slight increase in the proportion of mixed gender accommodation (81% to 82%).

**Chart 3.7. Accommodation projects by gender**

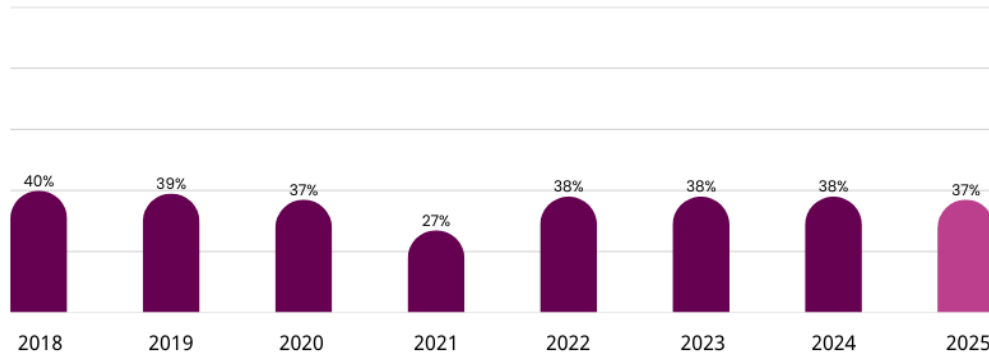


Source: Homeless England, N=936

### Young people

Young people here refers to people aged between 16-25. A total of 351 accommodation projects is dedicated to providing youth homelessness provision, representing 37% of all accommodation projects in England. This figure represents a 1 percentage point decrease from 2024, but remains static since 2022, bar an anomalous figure in 2021.

**Chart 3.8. Youth specific accommodation provision, 2018–2025**



Source: Homeless England, N=942

### Support needs

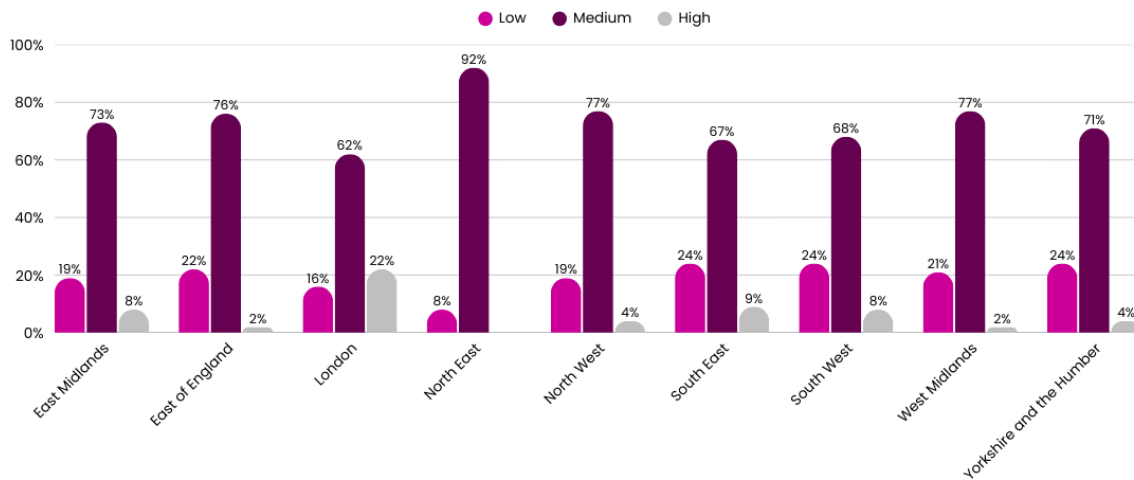
681 (72%) of the accommodation provided by the sector is supported accommodation, as opposed to emergency or direct access accommodation.<sup>26</sup> The latter is typically less specified according to support needs, with criteria being more focussed around current or immediate risk of rough sleeping. While some providers are better suited to certain needs such as substance misuse or mental health needs, emergency/direct access projects rarely identify a level of need that they are able to accommodate.

Conversely, supported accommodation providers are explicit about the level of support needs they are able to accommodate. Of the 681 supported accommodation providers, 92% (625) offer accommodation for low to medium support needs. Only 8% (56) of projects are able to support individuals with high or complex needs. There has been no change in the proportion of support needs provision since 2024.

There is significant regional variation apparent within accommodation suited to different support needs. In London, 22% of accommodation providers are able to support those with high needs, compared with 0% in the North East and 2% in the East of England and West Midlands. The lack of high needs provision is concerning given the evidence indicating the level of complex need that people experiencing homelessness present to services with.

### Chart 3.9. Proportion of accommodation provision available for different support needs by region

<sup>26</sup> Source: Homeless England, N=942



Source: Homeless England, N=681

The availability and provision of high needs support have changed regionally compared to 2024. In London there has been a 5 percentage point increase in high needs supported accommodation, as well as a 6 percentage point increase in high needs provision in the East Midlands. However, as evidenced in Table 3.1, many other regions have seen notable percentage decreases in the proportion of high needs support, including a 9% decrease in the East and a 4% decrease in the South West.

This regional disparity may be indicative of the impact of local level initiatives and strategic investment. For example, in London, through the Mayor’s Life Off the Streets Programme, projects and services have been commissioned to ensure people experiencing homelessness have the right specialist support and accommodation available to meet their needs.<sup>27</sup>

Access to the right support plays a critical role in pathways out of homelessness for people with severe and multiple disadvantage. The decline in high support needs provision across many regions in England speaks to the budget shortfalls facing the sector, reduction in commissioned services, and the consequences of short-term, patchwork, and insufficient funding.

**Table 3.1. Proportion of high support needs provision by region, 2024–2025**

	2024	2025
<b>East Midlands</b>	2%	8%
<b>East</b>	11%	2%
<b>London</b>	17%	22%

<sup>27</sup> Information about the Mayor’s Rough Sleeping Action Plan and Life Off the Streets Programme is available here: <https://www.london.gov.uk/programmes-strategies/housing-and-land/mayors-priorities-londons-housing-and-land/homelessness/rough-sleeping#the-mayors-life-off-the-streets-programme-27048-title>

<b>North East</b>	3%	0%
<b>North West</b>	4%	4%
<b>South East</b>	10%	9%
<b>South West</b>	12%	8%
<b>West</b>	4%	2%
<b>Midlands</b>		
<b>Yorkshire and the Humber</b>	2%	4%

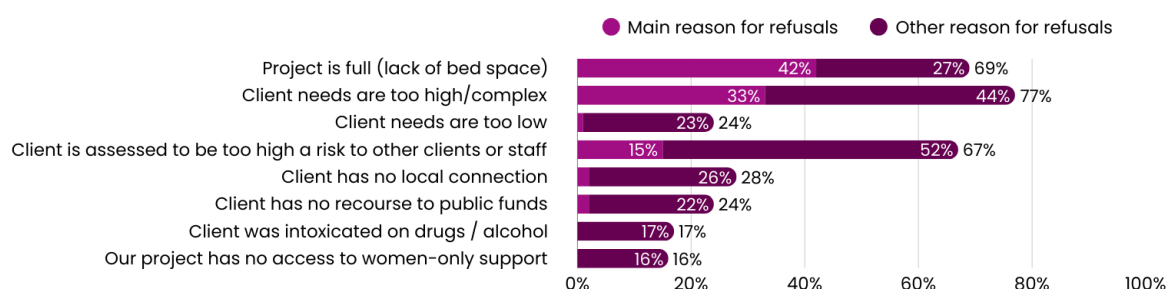
Source: Homeless England, N=681

## Accessing accommodation services

Survey respondents were asked how many people were accommodated in their project on a given night, and how many had been accommodated cumulatively over a 12-month period (between April 2024 and March 2025). There were 8,092 people accommodated on a given night and 14,144 people accommodated over the 12-month period. On average providers accommodate 2.4 times their capacity over a year period i.e. the move on rates were such that they were able to provide support for over double the number of beds that they have available.

179 respondents reported that they had refused access or referrals to their project at some point during the 12-month period. The most prevalent reason for someone to be turned away from an accommodation project is a lack of bed space (42%). Other key reasons for rejecting referrals include client needs being too high or complex and the client being assessed to be too high a risk to other clients or staff.

**Chart 3.10. Reasons for refused access or referrals to accommodation providers**

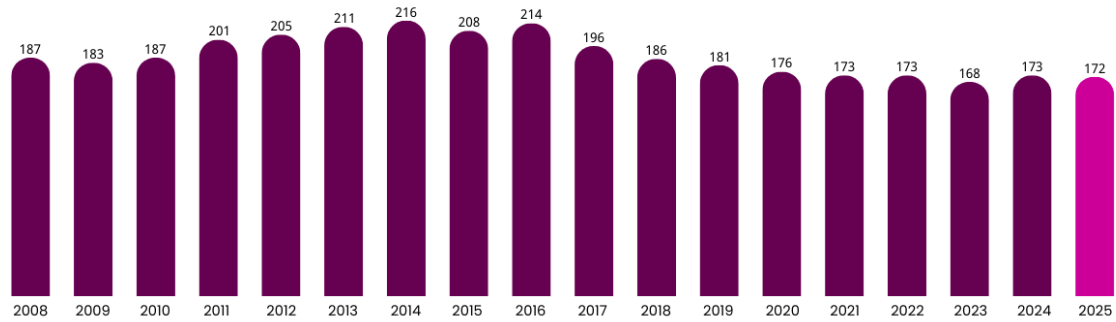


Source: Accommodation Providers Survey, N=179

## Availability of day centres

Data from the Homeless England database identified 172 day centres for people experiencing homelessness in England. This marks a very slight loss of provision from the preceding year with the closure of 1 day centre. However, the availability of day centres remains consistent with levels seen in 2021, 2022 and 2024.

**Chart 3.11. Number of day centres, 2008–2025**



Source: Homeless England, N=172

This trend broadly mirrors the rough sleeping count numbers, which climbed steadily until 2017 before starting to fall slowly, and then dropping sharply due to COVID-19 rough sleeping interventions. This suggests that the provision of day centres responds to levels of rough sleeping need. However, in recent years day centre capacity has not kept pace with the rise in rough sleeping. This is particularly evident in the East Midlands, South West and London (See Chart 3.12). Conversely the North West has a greater number of day centres compared to the rough sleeping count. However, the region has seen an increase in the number of people estimated to be rough sleeping in the last year, which indicates increased demand for open door access services.

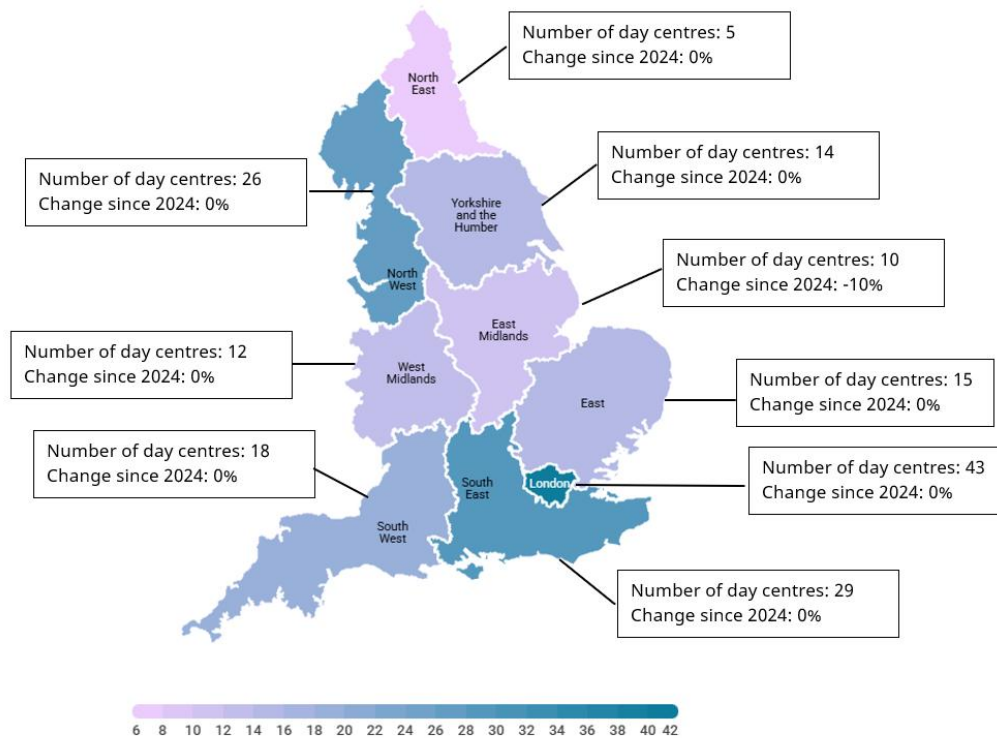
**Chart 3.12. Regional proportion of rough sleepers and day centres**



Source: Homeless England, N=172; 2025 Rough sleeping snapshot in England: Autumn 2025

The number of day centres remains unchanged across all regions, except for the West Midlands which has seen a reduction of 1 day centre.

**Map 3.3. Regional distribution of day centres, 2025**

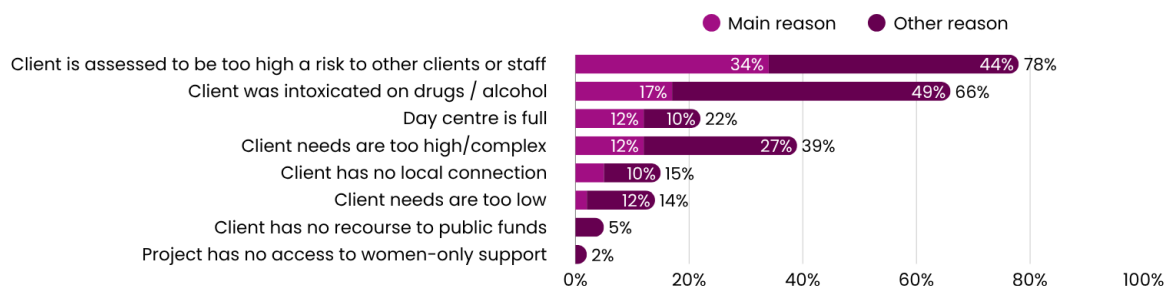


### Accessing day centres

Survey respondents reported a snapshot count of 1,967 people being supported by a day centre on a given day, and an estimated 76,200 people over the course of a year (between April 2024 and March 2025).

98% (41) of respondents reported that they had refused access or referrals to their project at some point between April 2024 and March 2025. The most common reason for refusal was that the client was assessed to be too high a risk to other clients or staff (34%), followed by the client being intoxicated on drugs or alcohol (17%).

**Chart 3.13. Reasons for refused access or referrals to day centres**



Source: Day Centres Survey, N=41

### Chapter 4: Support needs and support services available

This chapter explores the characteristics and support needs of people accessing single homelessness services. Drawing on findings from the accommodation provider and day centre surveys, this chapter looks at the profile of those accessing support, the main services provided by homelessness organisations, and barriers to accessing support.

#### Key headlines

- 62% of day centres report seeing an increase in people experiencing homelessness for the first time, as do 46% of accommodation providers.
- 37% of day centres and 23% of accommodation providers report increases in supporting people experiencing homelessness whilst in employment.
- A substantial proportion of day centres and accommodation providers, 79% and 33% respectively, report an increase in women accessing their services.
- 72% of day centres and 45% of accommodation providers also report an increase in refugees presenting at services.
- Mental health remained the most reported support need amongst accommodation providers. 90% of accommodation providers support residents with a history of diagnosed mental health conditions. This marks a 5% decrease from 2024 but is an 11% increase since 2022.
- All day centres (100%) reported high levels of support needs in relation to history of offending, physical ill health and disability, and alcohol dependency.
- Homelessness services face significant barriers in accessing support services, particularly within health and social care. Access to mental health support remains a big barrier for both accommodation providers and day centres (92% and 89% respectively). 88% of accommodation providers and 95% of day centres also report barriers to adult social care.

#### Profile of people accessing homelessness services

While there is a huge diversity of people experiencing homelessness, some populations remain less well served by existing provision that was not originally set up to reflect diverse needs and may not meet the current complexity of support needs. We now know that women,<sup>28</sup> young people,<sup>29</sup> people from the LGBTQIA+ community,<sup>30</sup> people of colour or from minoritised communities,<sup>31</sup> people with experience of the

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<sup>28</sup> Bretherton, J. & Pleace, N. (2018) Women and Rough Sleeping: A Critical Review of Current Research and Methodology. University of York

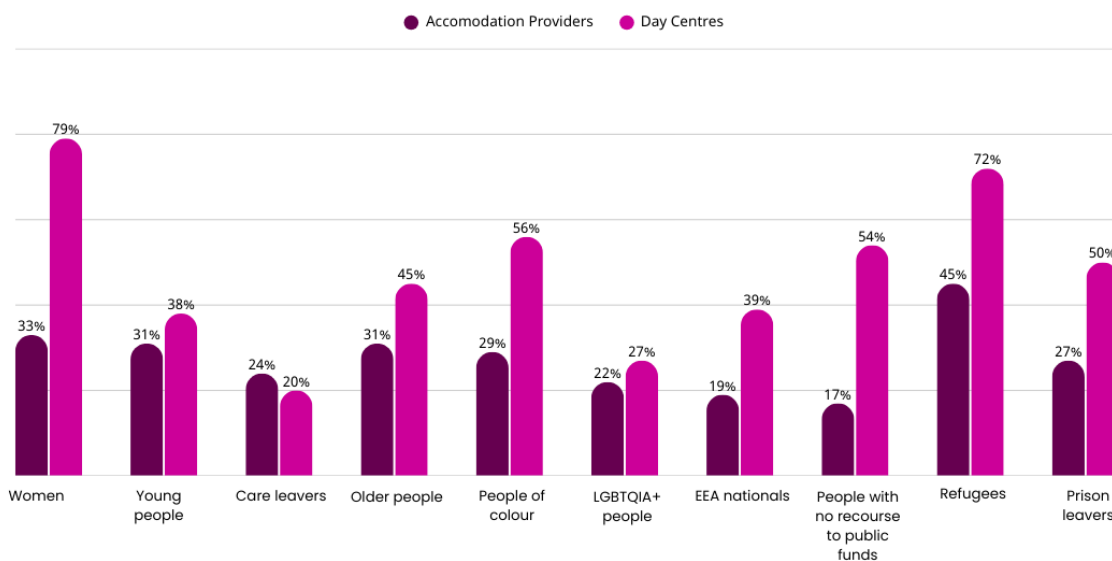
<sup>29</sup> Homeless Link (2018) Young and Homeless 2018; Homeless Link (2020) Young and Homeless 2020.

<sup>30</sup> AKT (2021) The LGBTQ+ youth homelessness report.

<sup>31</sup> Allard, M., D'Souza, S., and Leith, G. (2024). 'Where do I belong, where is home?': Experiences of racism and homelessness. London: Crisis

asylum system,<sup>32</sup> and people who have experienced multiple disadvantage<sup>33</sup> have different experiences that may lead to them becoming homeless, and also different needs once homeless. It is therefore important to understand the diversity of people supported by homelessness services. This section looks at whether providers have seen a change in the numbers of people from different populations that they have supported, compared to the previous year.

**Chart 4.1. Proportion of homelessness services who have seen an increase in the number of people they are supporting from specific populations**



Source: Accommodation Providers Survey, N=164; Day Centres Survey, N=39

In all cases, both accommodation providers and day centres have seen an increase in the number of people from different populations in need of their services and support. Nearly 8 in 10 day centres (79%) reported seeing an increase in women accessing their services. Women are more likely to experience hidden homelessness and are underrepresented in statutory data.<sup>34</sup> The increased awareness of the specific needs of women experiencing homelessness and the extent to which these have been historically underreported is evident in the growth of the Women’s Rough Sleeping Census.<sup>35</sup> The findings from this year’s survey would suggest that women are increasingly turning to day centres for support. This reiterates the crucial need for

<sup>32</sup> Homeless Link (2022) Unlocking the Door: A roadmap for supporting non-UK nationals facing homelessness in England.

<sup>33</sup> CFE research (2022) ‘More than a roof’ - addressing homelessness with people experiencing multiple disadvantage. Available at: <https://www.tnlcommunityfund.org.uk/media/insights/documents/39More-than-a-roof39-addressing-homelessness-with-people-experiencing-multiple-disadvantage-2022.pdf?mtime=20220311155105&focal=none>

<sup>34</sup> Bretherton, J. & Pleace, N. (2021) Women’s homelessness in Camden: Improving data, strategy and outcomes. Available at: <https://www.shp.org.uk/wp-content/uploads/2024/10/SHP-Report-Womens-Homelessness-In-Camden-Improving-Data-Strategy-Outcomes.pdf>

<sup>35</sup> Information on the Women’s Rough Sleeping Census is available at: <https://www.solacewomensaid.org/womens-rough-sleeping-census/>

funding for services to become gender-informed in order to prevent and end women's homelessness.

Both day centres and accommodation providers also reported seeing substantial increases amongst refugees accessing their services (72% and 45% respectively). 63% of day centres reported seeing an increase in the numbers of people presenting having been evicted from asylum accommodation. The announcement of the 42 day move-on period from asylum accommodation alongside the other Government proposals for reform to the asylum and immigration systems will mean that exiting asylum accommodation continues to be a substantial driver of rough sleeping and homelessness, particularly in the absence of wider improvements to the support available during the move-on period.<sup>36</sup>

A notable proportion of both accommodation providers and day centres report an increase in the number of prison leavers (27% and 50% respectively) and care leavers (24% and 20% respectively) accessing their services in 2024-2025. The new cross-government strategy targets to reduce homelessness from prisons, care and hospital outlined in the homelessness strategy is a welcome ambition.<sup>37</sup> Reducing the number of people leaving institutions into homelessness will help to break both a cause and symptom of homelessness and hopefully reduce pressure on frontline services. Support to End Homelessness will track the impact of these targets and plans over the coming years.

This year's report continues to highlight the role of homelessness services as a shadow health and social care sector, expected to support increasing numbers of people with a growing complexity of health needs. 79% of accommodation providers and 89% of day centres report an increase in the number of people they are supporting with mental health needs. The latest edition of the Unhealthy State of Homelessness evidences that people with diagnosed mental health conditions are still vastly overrepresented amongst those experiencing homelessness: 20% of adults in England have a diagnosed mental health condition, compared to 77% of people experiencing homelessness.<sup>38</sup>

Homelessness services also report seeing increases in the number of people with multiple and overlapping needs (72% of accommodation providers and 84% of day centres). The Unhealthy State of Homelessness report also found this to be a particular concerning trend with the rate of co-occurring conditions very high. For example, 37%

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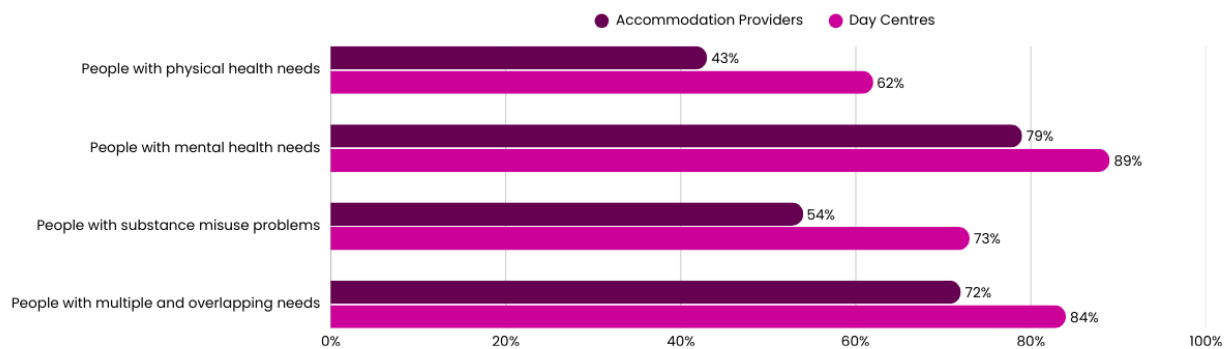
<sup>36</sup> Homeless Link (2026) New 42-day asylum move-on period confirmed. Available at: <https://homeless.org.uk/news/new-42-day-asylum-move-on-period-confirmed/>

<sup>37</sup> MHCLG. (2025) A National Plan to End Homelessness. Available at: <https://www.gov.uk/government/publications/a-national-plan-to-end-homelessness/a-national-plan-to-end-homelessness>

<sup>38</sup> Homeless Link (2025) The Unhealthy State of Homelessness 2025: Findings from the Homeless Health Needs Audit. Available at: [https://homelesslink-1b54.kxcdn.com/media/documents/Unhealthy\\_State\\_of\\_Homelessness\\_2025.pdf](https://homelesslink-1b54.kxcdn.com/media/documents/Unhealthy_State_of_Homelessness_2025.pdf)

of the sample had a dual diagnosis of a co-occurring mental health condition and drug/alcohol use.<sup>39</sup>

**Chart 4.2. Proportion of homelessness services who have seen an increase in the number of people they are supporting with health needs**



Source: Accommodation Providers Survey, N=174; Day Centres Survey, N=38

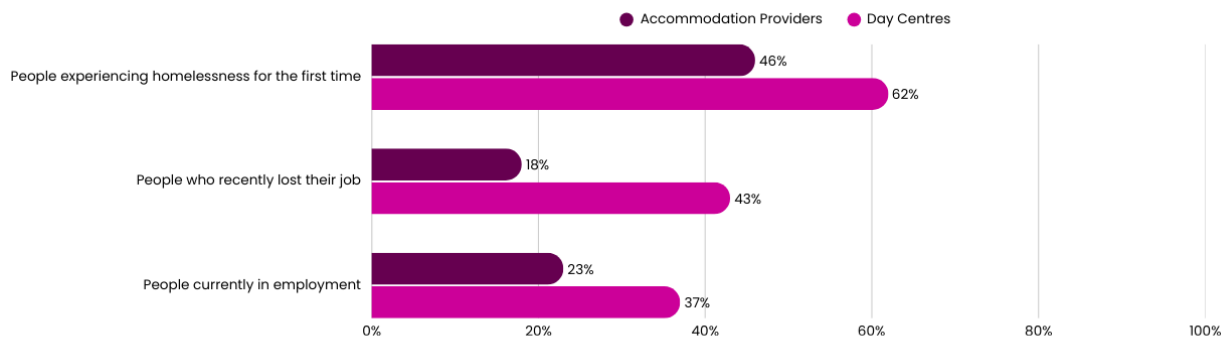
In recognition of ongoing financial pressures, cost of living pressures, and the ongoing consequences on the wider economy, this year’s survey asked about changes in the number of people needing support who were experiencing homelessness for the first time, those who had recently lost a job, and those who were currently in employment.

A high proportion of both accommodation providers (46%) and day centres (62%) report increases in the number of people accessing their services who were experiencing homelessness for the first time. This indicates that affordability and financial pressures continue to be key drivers of homelessness in 2025. Just over 4 in 10 day centres (43%) report seeing an increase in people who had recently lost their job. This reported change in profile reflects the current unemployment rate of 5.2%, which is at its highest since 2015.<sup>40</sup>

**Chart 4.3. Proportion of homelessness services who have seen an increase in the number of people they are supporting due to financial pressures**

<sup>39</sup> Homeless Link (2025) The Unhealthy State of Homelessness 2025: Findings from the Homeless Health Needs Audit. Available at: [https://homelesslink-1b54.kxcdn.com/media/documents/Unhealthy\\_State\\_of\\_Homelessness\\_2025.pdf](https://homelesslink-1b54.kxcdn.com/media/documents/Unhealthy_State_of_Homelessness_2025.pdf)

<sup>40</sup> House of Commons Library (2026) UK labour market statistics. Available at: <https://researchbriefings.files.parliament.uk/documents/CBP-9366/CBP-9366.pdf>



Source: Accommodation Providers Survey, N=171; Day Centres Survey, N=38

Moreover, 45% of day centres report seeing increases in the number of older people accessing their services. CHAIN data shows an increase in people in this age bracket sleeping rough in London from 450 at the beginning of 2024 to 713 at the end of 2025.<sup>41</sup> Research suggests that inflated living costs, a higher proportion of this age group living in PRS accommodation and a social care gap is driving increasing numbers of the over-55 cohort into homelessness.<sup>42</sup> Few homelessness services are equipped to support the particularly frailty needs of older people, and this risks becoming an area of growing concern with a significant support gap, if these trends continue.

## Support needs of people accessing homelessness services

Service providers were asked for information on the support needs of people accessing their services and how this has changed compared to the previous year. Across both accommodation providers and day centres every resident or service user had additional support needs beyond housing. This follows the trend emerging since 2021, which showed a significant increase in the level of support needs seen across providers compared with previous years.

### Accommodation providers

Accommodation providers were asked whether the clients who are currently being accommodated in their service have any support needs. The most common response is having a history of mental health diagnoses (90%), followed by neurodivergence (85%), at risk of/has experienced domestic abuse (79%), drug dependency needs (78%), and history of offending (77%). This year marks the first time the survey has asked explicitly about neurodivergence. The figure supports other research which shows a disproportionate representation of neurodivergent people within homeless populations. For example, the Unhealthy State of Homelessness report found that 8%

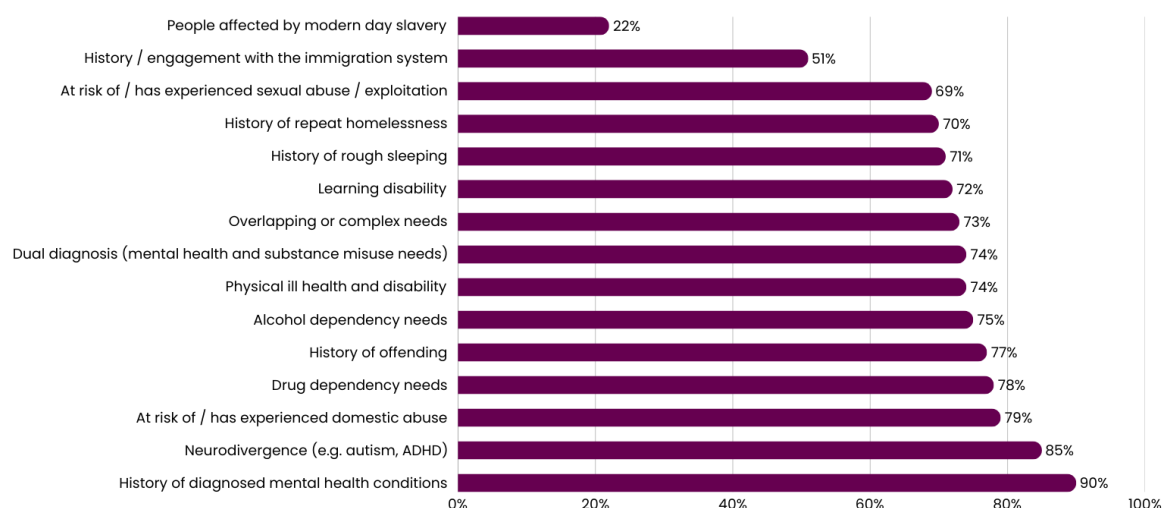
<sup>41</sup> <https://www.theguardian.com/society/2026/apr/08/over-55s-facing-homelessness-rising-costs-social-housing>

<sup>42</sup> Crisis (2025) Older people's experiences of housing precarity and homelessness. Available at: [https://www.crisis.org.uk/media/jmlpfze0/olderpersonhousingprecarity\\_crisis\\_research\\_august2025.pdf](https://www.crisis.org.uk/media/jmlpfze0/olderpersonhousingprecarity_crisis_research_august2025.pdf)

of people experiencing homelessness had autism/ASD compared to 3% of the general population.<sup>43</sup> Most homelessness services are not always designed with neurodivergent needs in mind, which can compound exclusion and make it harder for individuals to access and sustain support.

Accommodation projects are also working with people with learning disabilities (72%), who have been affected by sexual abuse or exploitation (69%) and modern day slavery (22%). The diversity and severity of needs of people accessing homelessness accommodation services is profound and the level of specialism necessary to provide appropriate support must be acknowledged.

**Chart 4.4. Proportion of accommodation projects reporting specific support needs among residents**

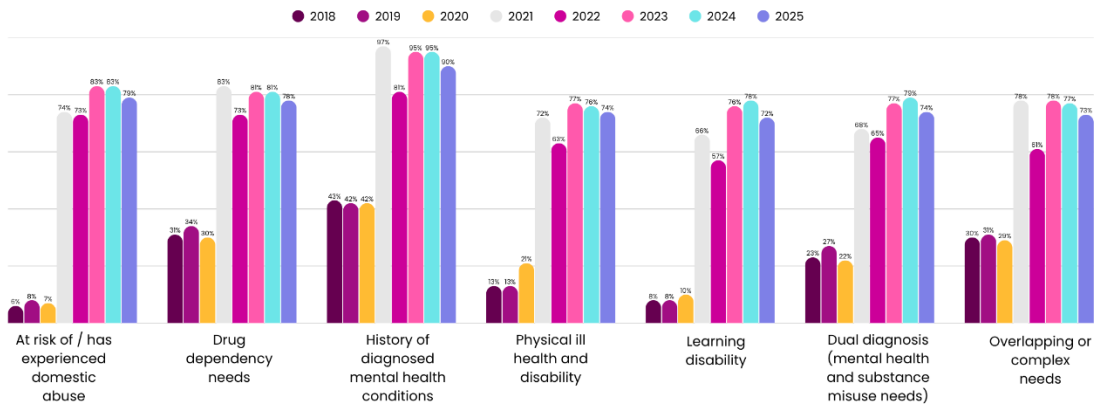


Source: Accommodation Providers Survey, N=164

Compared to 2024, the proportion of accommodation providers supporting people across all types of support needs has decreased marginally. Whilst this is somewhat good news, levels of support needs remain staggeringly high compared to pre-2022 levels, which suggests a continued shift in the profile of people accessing support, with people presenting with a much greater complexity of need, and services not equipped to provide sufficient and appropriate support.

**Chart 4.5. Change in accommodation project support needs, 2018 – 2025**

<sup>43</sup> Homeless Link (2025) The Unhealthy State of Homelessness 2025: Findings the Homeless Health Needs Audit. Available at: [https://homelesslink-1b54.kxcdn.com/media/documents/Unhealthy\\_State\\_of\\_Homelessness\\_2025.pdf](https://homelesslink-1b54.kxcdn.com/media/documents/Unhealthy_State_of_Homelessness_2025.pdf)



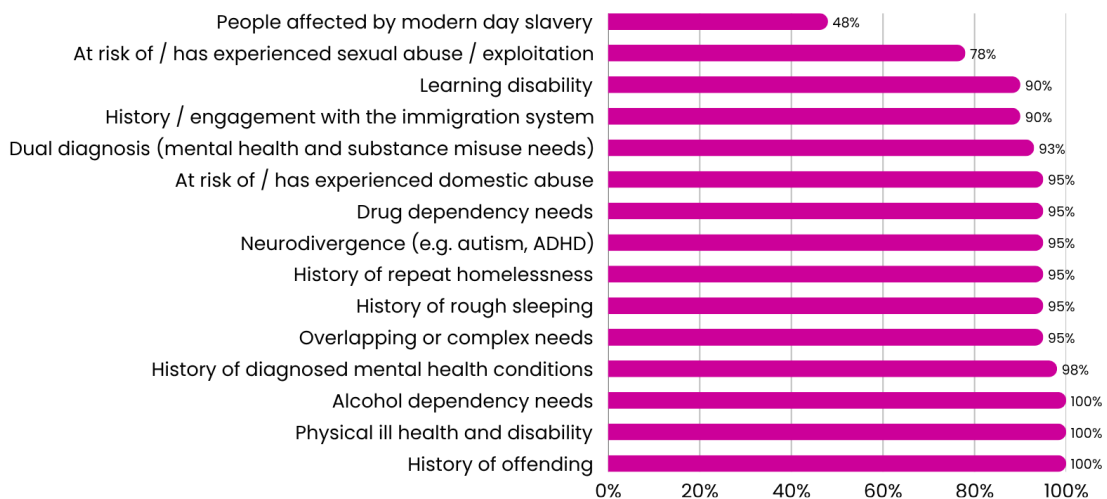
Source: Accommodation Providers Survey, N=184; Homeless Link Support for single homeless people in England, Annual Review 2018 - 2023; Support to End Homelessness 2024

### Day Centres

Support needs of day centre users remain extremely high, with 100% of day centres reporting supporting people with the following needs: alcohol dependency, physical ill health and disability, and history of offending. There were also high levels of services supporting people with domestic abuse (95%), drug dependency needs (95%), neurodivergence (95%) and overlapping or complex needs (95%).

Whilst health and social care needs are most prevalent, day centres also reported a range of other support needs, including around learning disability (90%), and history/engagement with the immigration system (90%).

### Chart 4.6. Support needs of day centre users

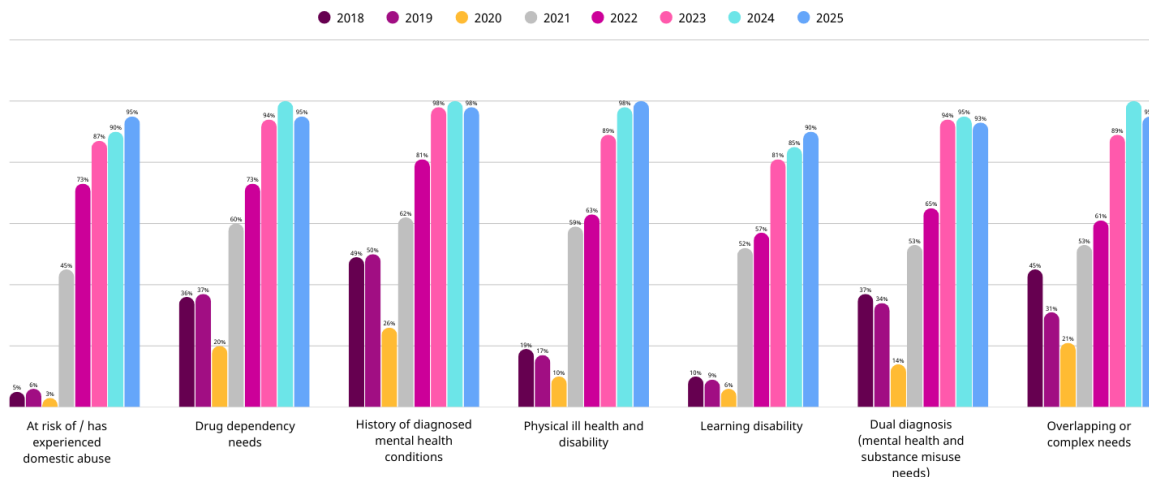


Source: Day Centres Survey, N=40

Compared to 2024, day centres report a mixed picture in the changing profile of support needs of their service users. There have been slight increases in the proportion of day centres reporting supporting people at risk of or having experienced domestic abuse (+5%), physical ill health and disability (+2%), and learning disability

(+5%). There have also been some very marginal decreases in levels of drug dependency needs, history of diagnosed mental health conditions, dual diagnosis and overlapping or complex needs.

**Chart 4.7. Change in support needs of day centre users, 2018 – 2025**



Source: Day Centres Survey, N=40, Homeless Link Support for single homeless people in England, Annual Review 2018 - 2023; Support to End Homelessness 2024

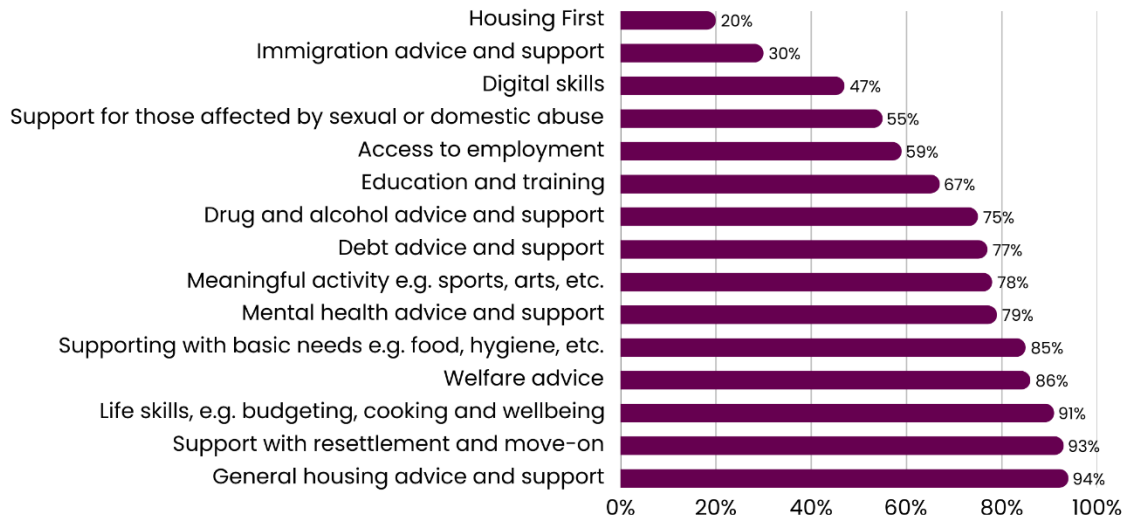
## Support services provided by homelessness services

Accommodation providers and day centres deliver a range of services to help people experiencing homelessness address their support, care, and practical needs in addition to their housing needs. These services can be provided in-house at the services’ premises, externally at another service, or both.

### Accommodation providers

Accommodation providers were asked what support services are available for their projects. Unsurprisingly for accommodation providers, the most reported services provided relate to general housing advice and support (94%) and support with move on and resettlement (93%). Life skills support including budgeting and cooking is offered by 91% of providers, and support with basic needs including food and hygiene by 85%. A large proportion of providers are offering support related to health and social care, including mental health advice and support (79%) and substance misuse support (75%). The diversity of provision is clear from the range of different services available through accommodation providers, as illustrated in Chart 4.8 below.

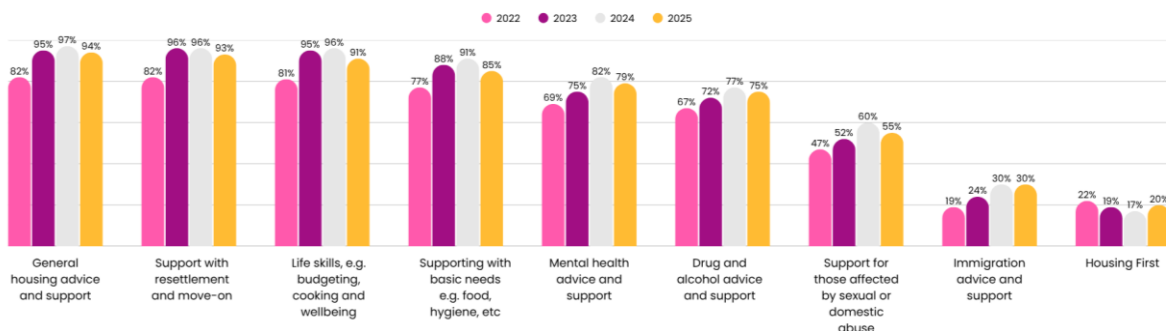
**Chart 4.8. Service provision within accommodation projects**



Source: Accommodation Providers Survey, N=167

Accommodation providers are evidently delivering a huge range of services, working across housing advice, relief and support. However, in 2025, the proportion of accommodation providers offering provision has slightly declined across each type of service or support, except for immigration advice and Housing First. For example, the proportion of providers offering support with basic needs such as food and hygiene has decreased by 6%. This suggests that funding pressures are leading to a reduction in services, and accommodation providers are having to prioritise where to allocate resource and time. It also reflects a change in the profile of needs, with service design and provision having to adapt and respond to changing presentations.

**Chart 4.9. Change in service provision within accommodation projects**



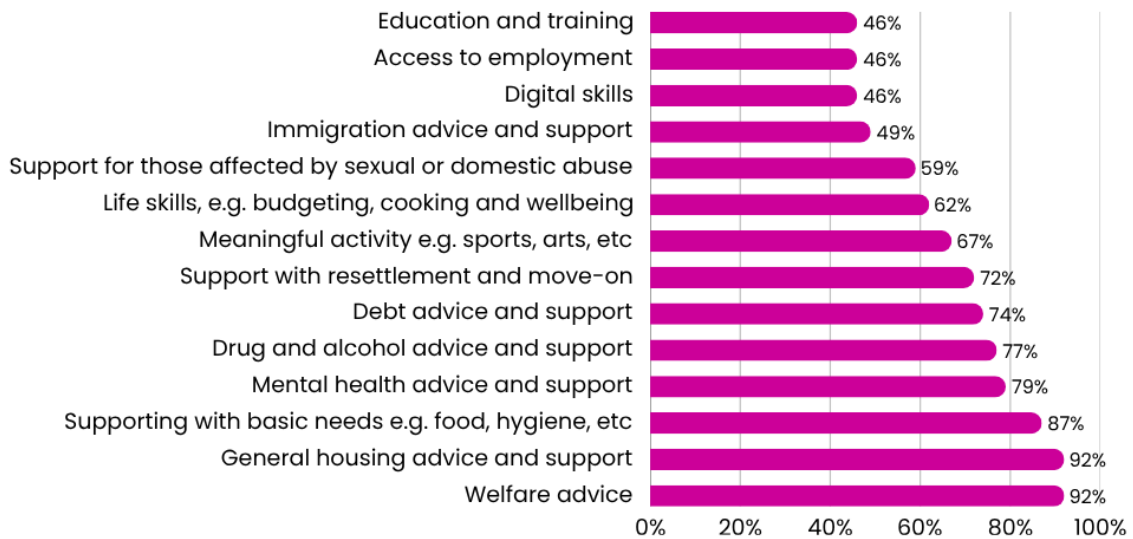
Source: Accommodation Providers Survey, N=167; Homeless Link Support for single homeless people in England, Annual Review 2018 - 2023; Support to End Homelessness 2024

**Day Centres**

Day centres were asked what additional support they provide for those who make use of their services. As with accommodation providers, all day centres offer a range of different support as part of their service, with an average of 11 different additional services or support available within their provision.

Support focussed on immediate needs was more prevalent amongst day centres, with 92% offering general housing advice and support, and 87% offering support with basic needs including food and hygiene. Providing advice and support related to welfare (92%), mental health (79%), and substance misuse (77%) are also all very common amongst day centre provision.

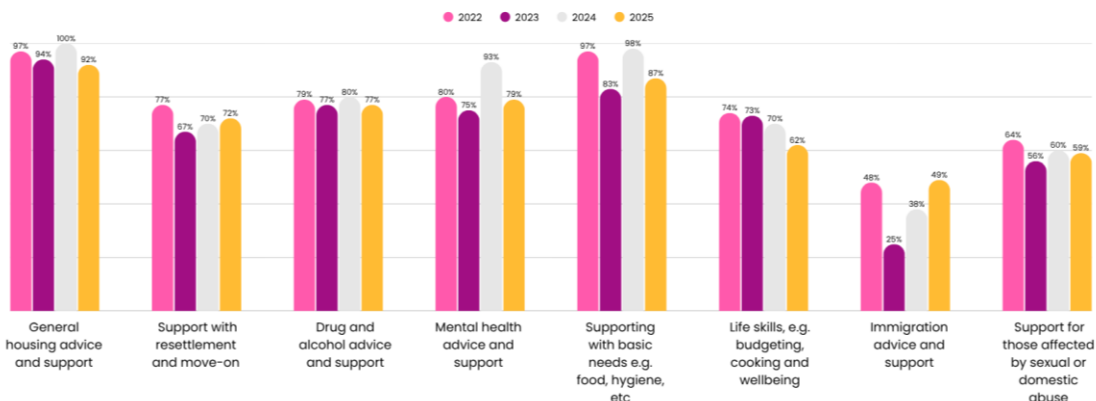
**Chart 4.10. Service provision within day centres**



Source: Day Centres Survey, N=39

When looking comparatively at the changes in service provision, day centres are increasingly providing immigration advice and support, with an 11% increase from 2024. This reflects the changing profile of clients, with day centres reporting substantial increases of refugees presenting at their doors. Other areas of support and service provision have decreased; for example, 79% of day centres report offering mental health advice support, compared to 93% in 2024. As with accommodation providers, this does not align with the changing needs people are presenting with and instead suggests a reduction in services to compensate for funding shortfalls.

**Chart 4.11 Change in service provision within day centres, 2022 – 2025**



Source: Day Centres Survey, N=39; Homeless Link Support for single homeless people in England, Annual Review 2018 – 2023; Support to End Homelessness 2024

### Barriers to accessing services

Not all support is, or should be, available internally within homelessness providers, and more significant needs or those that need support from specialist, clinical and regulated services rely on wider system and public services infrastructure. It is clear that a significant amount of the activity within homelessness support is about helping people access wider services. Providers were asked about whether they experience barriers in accessing external services for the people they support, and, where barriers exist, what they typically relate to.

#### Accommodation providers

For accommodation providers, access to mental health support remains the most challenging with 92% of respondents stating they have a problem accessing mental health services. This is followed by 88% of respondents reporting they face barriers linking their clients into adult social care services. Consultation with Homeless Link members highlights the failings of current pathways and systems, with services struggling to engage the social care sector when somebody's needs exceed what their service is designed to support.<sup>44</sup> In the absence of appropriate social care, homelessness services are often the last line of support available for people who are acutely unwell and at high risk of negative outcomes.

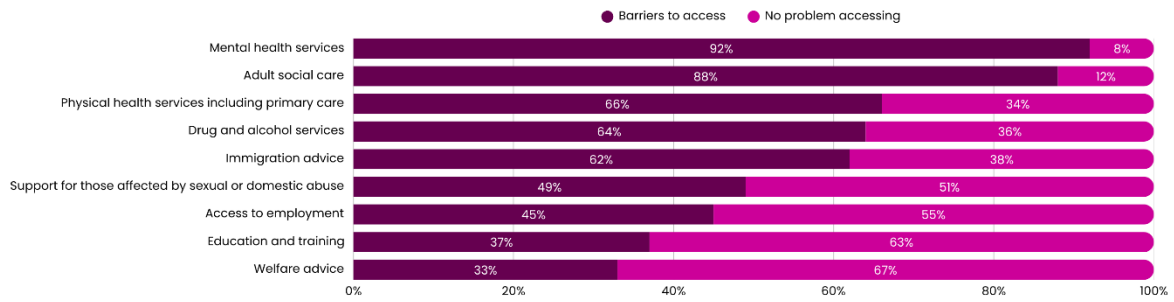
There has also been a 4% increase in the proportion of accommodation providers experiencing barriers in accessing physical health services since 2024. This is particularly concerning given other evidence showing the continuing decline in the physical health of people experiencing homelessness. In the most recent publication of the Unhealthy State of Homelessness, 81% of respondents reported having at least one physical health condition.<sup>45</sup> Homelessness is a health issue: it is both caused by poor health and a cause of poor health. The findings in Chart 4.13 highlight the deep health inequalities faced by people experiencing homelessness in accessing the appropriate and required services.

#### Chart 4.12. Barriers in accessing services for accommodation providers

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<sup>44</sup> Homeless Link. Is it time for change in social care and homelessness? Our response to the Casey Commission. Available at: <https://homeless.org.uk/news/is-it-time-for-change-in-social-care-and-homelessness-our-response-to-the-casey-commission/>

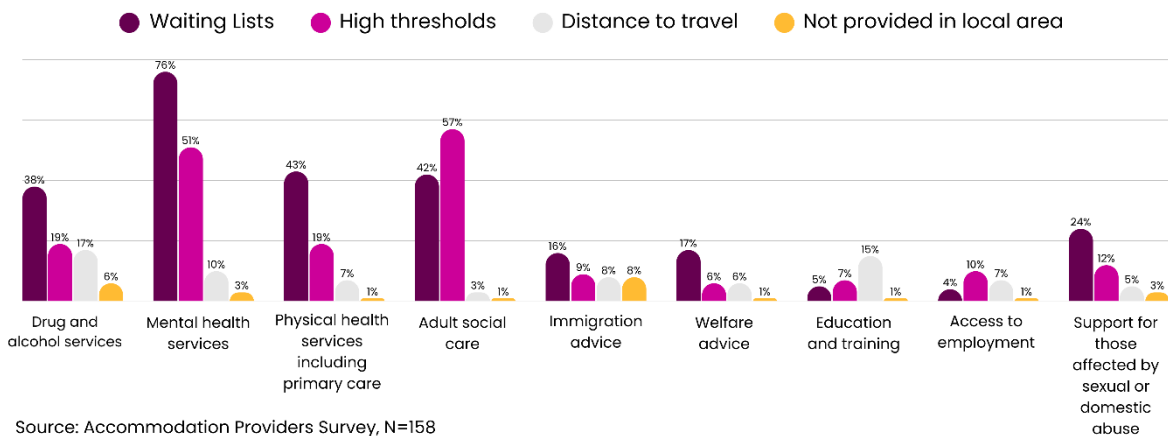
<sup>45</sup> Homeless Link (2025) The Unhealthy State of Homelessness 2025: Findings the Homeless Health Needs Audit. Available at: [https://homelesslink-1b54.kxcdn.com/media/documents/Unhealthy\\_State\\_of\\_Homelessness\\_2025.pdf](https://homelesslink-1b54.kxcdn.com/media/documents/Unhealthy_State_of_Homelessness_2025.pdf)



Source: Accommodation Providers Survey, N=158

When looking at why providers experience barriers, waiting lists remain the biggest challenge in terms of access to other services, with 76% of providers saying waiting lists are a barrier to mental health services, and 43% for physical health services. Over half of respondents report that high thresholds are also a key driver of challenges to accessing adult social care and mental health services (57% and 51% respectively), with adult social care the only service where high thresholds are identified as the main barrier to access.

**Chart 4.13. Reasons accommodation providers face barriers to services**

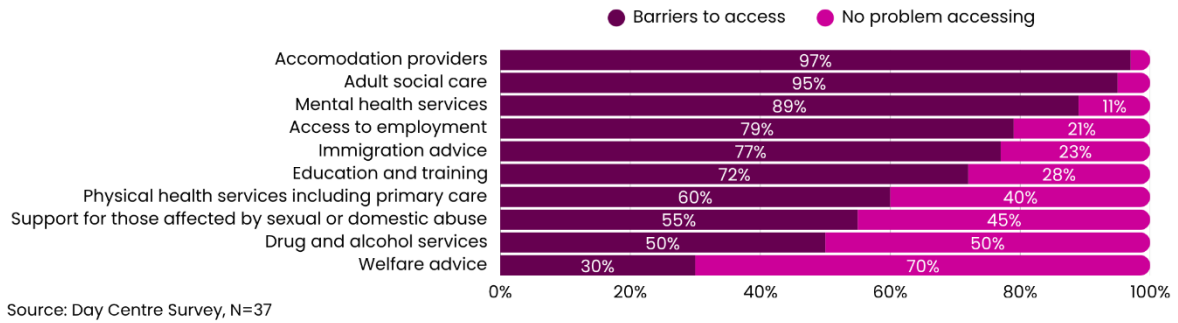


Source: Accommodation Providers Survey, N=158

## Day Centres

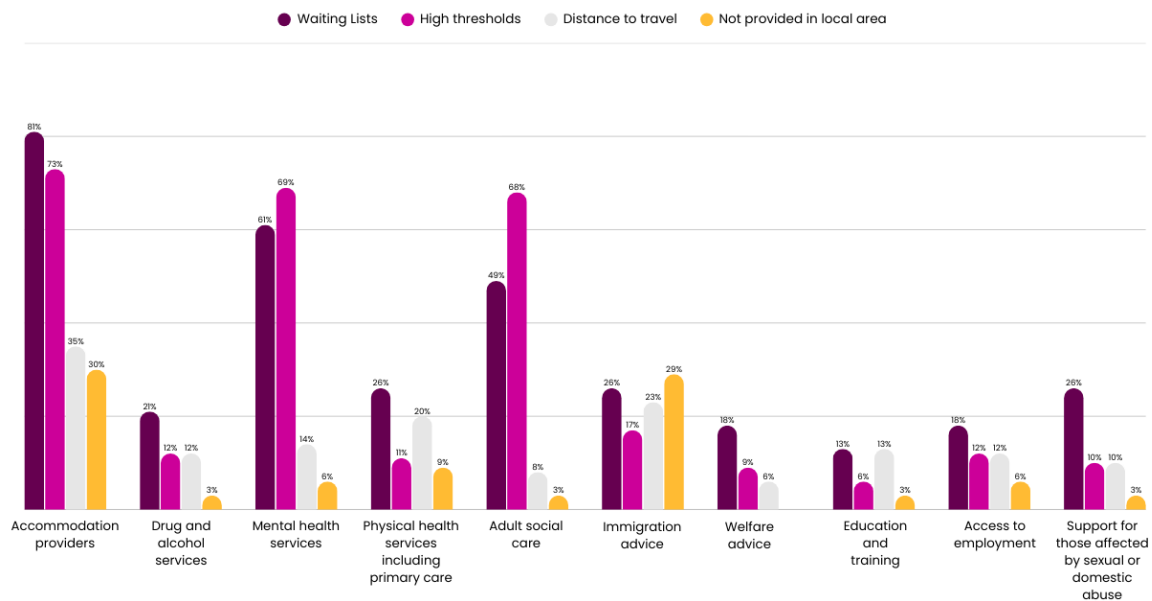
For day centres, access to accommodation providers (97%), adult social care (95%) and mental health services (89%) is reported to be a considerable challenge.

**Chart 4.14. Barriers in accessing services for day centres**



When looking at why day centres experience barriers to services, high thresholds is the most common reason reported for barriers to mental health (69%) and adult social care (68%) services. Waiting lists also continue to prevent access to vital services, including accommodation providers (81%), physical health (26%) and support for those affected by sexual or domestic abuse (26%).

**Chart 4.15. Reasons day centres face barriers to services**



## Chapter 5: Funding

Over the last eighteen years, as the Supporting People ringfence ended, the Support to End Homelessness series has tracked how homelessness services are funded and how this has changed over time.

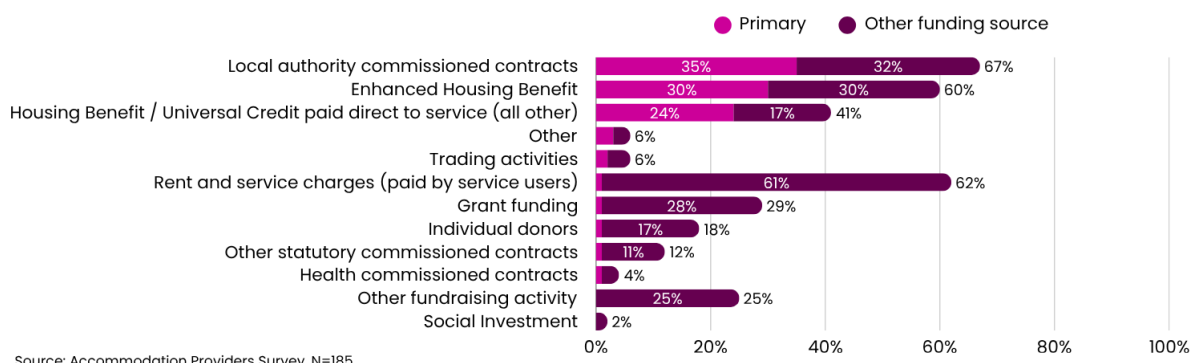
### Key headlines

- Housing benefit is the most commonly cited primary source of income for accommodation providers (54%), of which, 56% stated Enhanced Housing Benefit was their main source of income. This is followed by local authority commissioned contracts (35%).
- Since the end of the Supporting People ringfence in 2008 there has been a 2603% increase in Housing Benefit as the main funding source for homelessness accommodation providers and a 59% decrease in local authority commissioned contracts.
- Income for day centres is heavily reliant on fundraising, grants and philanthropy, with income from these sources the main funding for 80% of providers. This is most commonly through grant funding (54%) and individual giving (22%).
- 19% of accommodation providers stated that their income had decreased since the previous year, with 52% stating there was no change to their income, and 28% reporting an increase.
- 27% of day centres stated that their income had decreased since the previous year, with 44% stating there was no change to their income, and 29% reporting an increase.
- 41% of accommodation providers and 46% of day centres reported that they risk service closures as a result of increased financial pressures, and 35% of accommodation providers stated they have already reduced their provision.

### Accommodation providers' funding sources

Accommodation providers were asked to identify their primary (greatest) funding source and subsequently the other sources of funding they receive. Chart 5.1 below illustrates the main sources of funding (i.e. the top selected funding source of all sources included in the survey for accommodation providers). The findings show that the primary sources of funding for accommodation providers are Housing Benefit (54%), followed by Local Authority commissioned contracts (35%).

#### Chart 5.1. Accommodation providers' funding sources

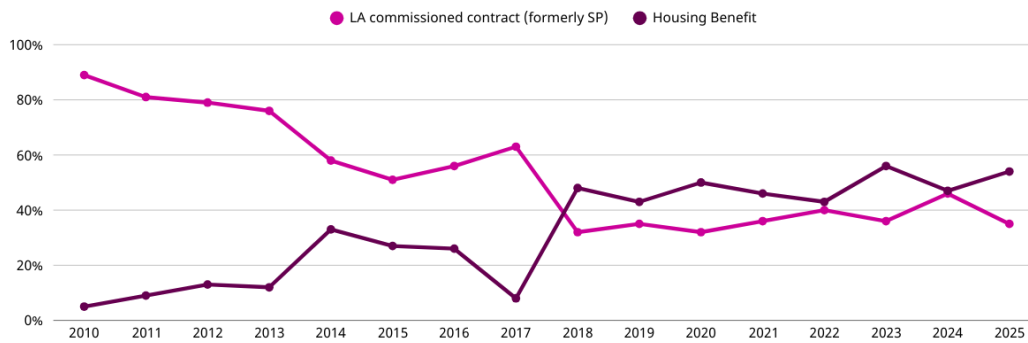


Housing Benefit is currently the main source of funding for most accommodation providers, with this weighted towards Enhanced Housing Benefit. Given the continued attention on the role of exempt accommodation and funding for supported accommodation providers, our survey asked respondents to separate out Housing Benefit by Enhanced Housing Benefit income, and all other Housing Benefit income including Universal Credit. Enhanced Housing Benefit accounts for 56% of main income received through Housing Benefit.

Since 2010 there has been a significant shift in the way in which accommodation providers are funded, with the ending of the ring-fenced Supporting People programme and the growth in providers becoming more reliant on Housing Benefit through exempt accommodation regulation. Chart 5.2 shows that it was in 2017 that the big switch to providers generating most of their income through Housing Benefit was seen and that for the first time supported accommodation providers were primarily funded through the welfare benefit system rather than through local authority commissioning and grants.

In the last decade there has been a 100% increase in Housing Benefit as a funding source for homelessness accommodation and a 31% decrease in local authority commissioned services. This rises to an incredible 2603% increase in Housing Benefit as the primary funding source for homelessness accommodation, and a 59% decrease in local authority commissioned services, since the end of the Supporting People ringfence in 2008.

### Chart 5.2. Accommodation providers change in main funding source: 2010 – 2025

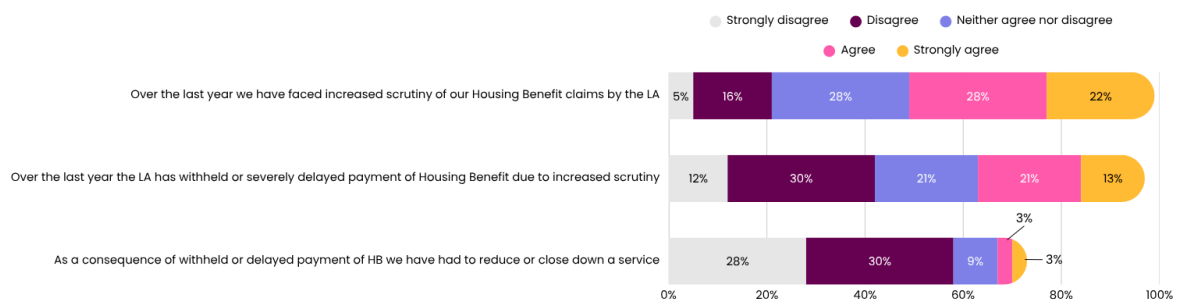


Source: Accommodation Providers Survey, N=185; Homeless Link Annual Review; Support to End Homelessness 2024

In the context of the increased scrutiny on supported exempt accommodation funded through Enhanced Housing Benefit in anticipation of the implementation of the Supported Housing Regulatory (Oversight) Act, the accommodation provider survey asked respondents about their experience of Housing Benefit payments over the past year. Half of accommodation providers (50%) strongly agree or agree that they faced increased scrutiny of their Housing Benefit claims by the local authority. 34% of providers strongly agree or agree that over the past year the local authority withheld or severely delayed payment of Housing Benefit due increased scrutiny. This is a significant problem due to a large proportion of providers relying on Housing Benefit payments as their main source of income. Alarming, 6% of providers report that they had to reduce or close down a service as a consequence of withheld or delayed payments.

It is worth noting that this increased scrutiny and consequences thereof, are in advance of the new national supported housing standards and licensing regime that will be introduced through the Supported Housing Regulatory (Oversight) Act. With the details of the standards still undergoing consultation and development within MHCLG it is not clear what metrics and thresholds Local Authorities are using to apply increased scrutiny to their local supported housing. These figures also serve as a warning to some of the potential unintended consequences of the new licensing regime and the need to be alive to the risk of loss of services as the regulation rolls out.

**Chart 5.3. Impact of increased scrutiny of Housing Benefit payments on accommodation providers**

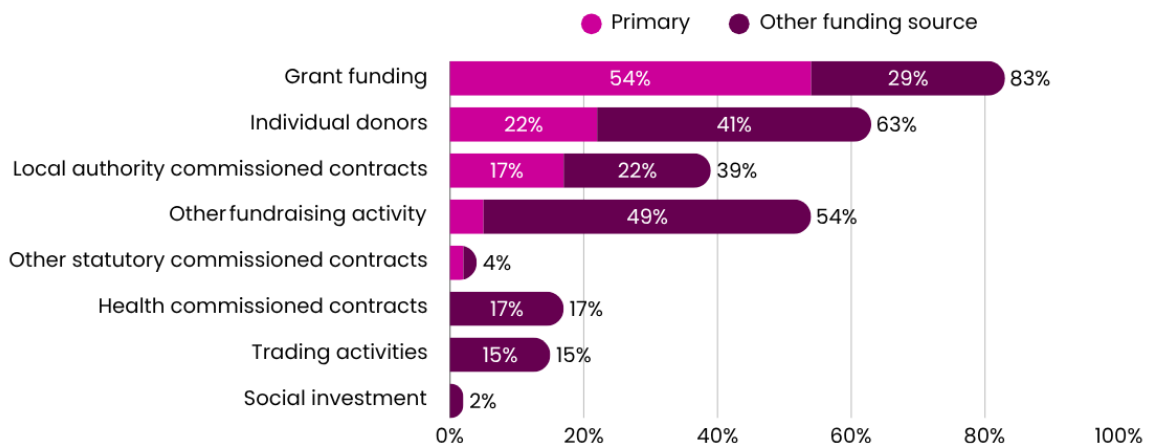


Source: Accommodation Providers Survey, N=166

## Day centres funding sources

Income for day centres is heavily reliant on fundraising, grants and individual donors with income from these sources the main funding for 80% of providers. This is most commonly through grant funding (54%) and individual giving (22%). 17% of daycentres receive local authority grants or commissioned contracts as their main funding source.

**Chart 5.4. Day centres funding sources**



Source: Day Centres Survey, N=41

## Change in income for accommodation providers

19% of accommodation providers stated that their income had decreased since the previous year, with 52% stating there was no change to their income, and 28% reporting an increase.

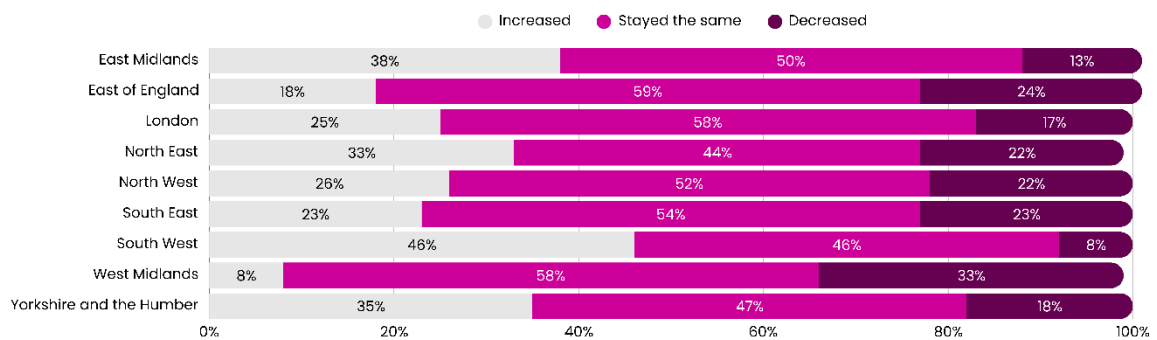
**Chart 5.5. Overall funding compared to last financial year for accommodation providers**



Source: Accommodation Providers Survey, N=183

Comparing across regions, for most accommodation providers there was little change in their funding, with most stating that in 2024-25 their funding had stayed the same compared to the previous financial year. The South West is an exception to this, where the same number of providers reported that their funding had either increased or stayed the same (46%). 33% of accommodation providers in the West Midlands reported a decrease in funding, which was the largest decrease across England.

**Chart 5.6. Overall funding compared to last financial year for accommodation providers by region**

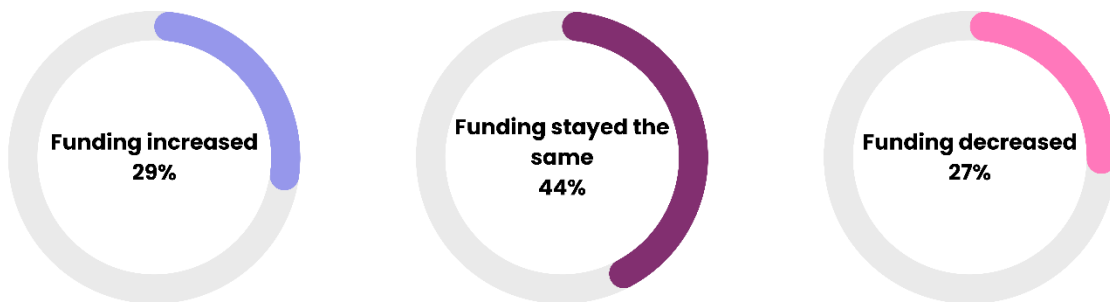


Source: Accommodation Providers Survey, N=183

## Change in income for day centres

27% of day centres stated that their income had decreased since the previous year, with 44% stating there was no change to their income, and 29% reporting an increase.

**Chart 5.7. Overall funding compared to last financial year for day centres**



Source: Day Centres Survey, N=41

## Impact of increased financial pressures

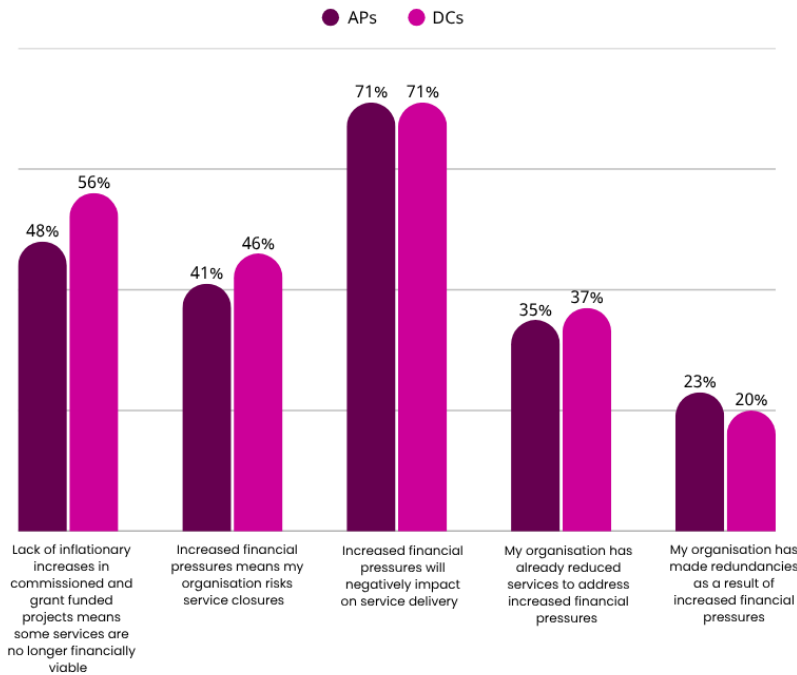
The 2025 survey was carried out against a backdrop of continued financial pressure, in which the homelessness sector has delivered services in the context of overstretched funding, ongoing inflation and increasing demand for its services.

The system overall is at once hugely expensive and insufficient, having been subject to severe cuts and funded in a patchwork manner that can trap people in homelessness for longer and leave some without any access to support at all. Homelessness services can act as a lifeline for those with few other options, but the current funding system for the homelessness sector undermines its ability to deliver high-quality support. Like many other essential services, the sector faces significant budget shortfalls. This has left providers unable to plan strategically for the future, hopping from crisis to crisis as service quality drops.

The protections to homelessness spending delivered in the Comprehensive Spending Review are welcome, but the findings from this year's review indicate that perhaps they are not enough to address the ongoing underfunding of support delivered by supported housing providers. The increases to core costs caused by inflation and incoming regulation requires funding settlements that meet the true cost of service delivery.

This is evidenced by Chart 5.8 below, which shows that the biggest impact of increased financial pressure is the negative implications on service delivery, with 71% of accommodation providers and 71% of day centres both agreeing with this statement. It is also noteworthy that nearly half of accommodation providers (48%) feel that the lack of inflationary increases in commissioned and grant funded projects means some services are no longer financially viable. It is deeply concerning that nearly half of all day centres (46%) and accommodation providers (41%) reported that increased financial pressures means that their organisation risks service closures.

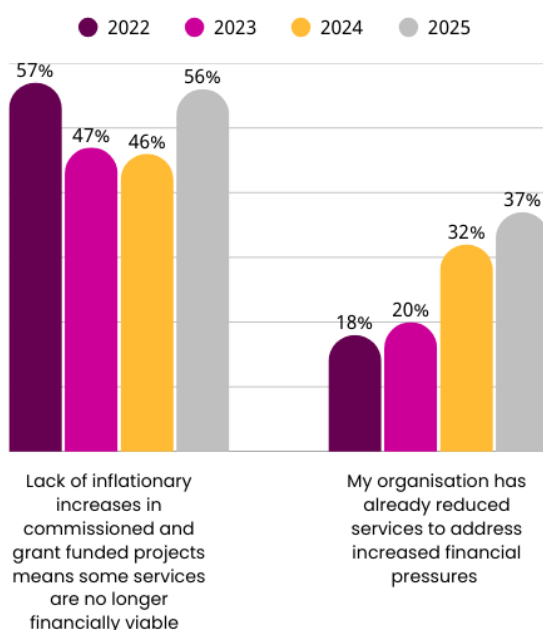
### **Chart 5.8. Impact of increased financial pressure on service provision**



Source: Accommodation Providers Survey, N=171; Day Centres Survey, N=41

The findings from the day centre survey indicate significant increasing financial pressure over recent years. 37% of day centres report having already reduced services to address increased financial pressures, compared with 18% just 4 years ago. Similarly, over half of day centres report that a lack of inflationary increases in commissioned and grant funded projects mean some services are no longer financially viable. This represents a 10% percentage point increase from 2024. This is an alarming trend in service closure and reduction, particularly given the vital role day centres often play as the first port of call for people experiencing homelessness, multiple disadvantage and acute crisis.

**Chart 5.9. Impact of Increased financial pressures on day centres**



Source: Day Centres Survey, N=41

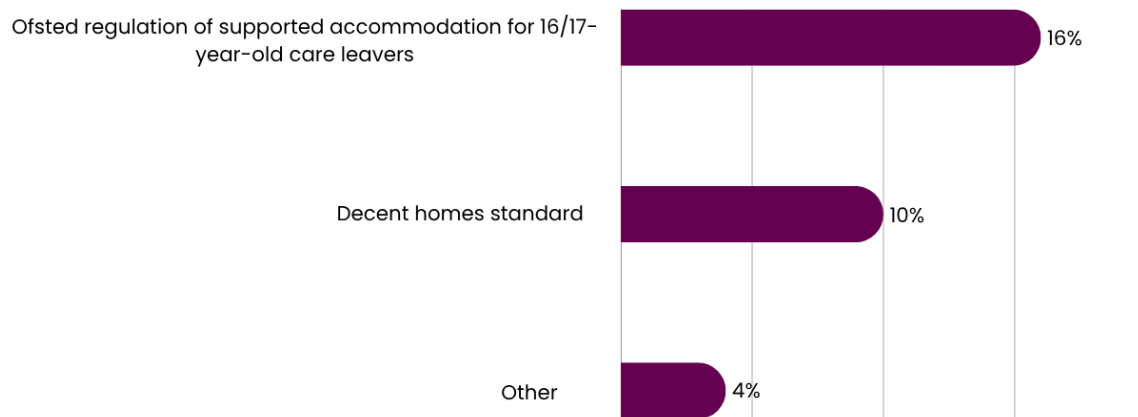
## Regulation

The Supported Housing (Regulatory Oversight) Act 2023 introduces powers to create a licensing regime for supported housing, set National Supported Housing Standards for England and link the payment of Enhanced Housing Benefit to holding a supported housing licence. It also places a duty on local housing authorities to undertake a current and future needs assessment and produce a supported housing strategy.<sup>46</sup>

The proposed legislation is likely to be implemented in 2027. Ahead of this, the Support to End Homelessness survey asked accommodation providers about which regulations they have become newly subject to and the financial impact the incoming regulations may be having on service delivery. 16% of accommodation providers are newly subject to Ofsted regulation for 16/17 year-old care leavers, and 10% are now adhering to the Decent Homes Standard.

### Chart 5.10. Proportion of accommodation providers newly subjected to regulation

<sup>46</sup> Homeless Link. Supported Housing Regulatory Oversight Act. Available at: <https://homeless.org.uk/areas-of-expertise/improving-homelessness-services/regulation-of-homelessness-services/supported-housing-regulatory-oversight-act/>



Source: Accommodation Providers Survey, N=188

Of those providers who are newly subject to regulation, 57% (30) report that they have experienced additional cost pressures as a result. We support the ambition to ensure high standards in homelessness supported accommodation and the sector more widely, however the Government's current proposals fail to consider that these changes will not be possible without proper funding and resource. New regulation will create significant financial and administrative burdens for organisations (e.g. costs of compliance, capital or service improvements) that have been underfunded for years and may struggle to remain viable.<sup>47</sup>

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<sup>47</sup> Homeless Link. Supported Housing (Regulatory Oversight) Act consultation: Homeless Link response. Available at: <https://homeless.org.uk/knowledge-hub/supported-housing-regulatory-oversight-act-consultation-homeless-link-response/>

## Chapter 6: Move on from accommodation

The main aim of most homelessness services is to support people to move out of homelessness and into independent living. This chapter draws on the accommodation survey findings to explore key trends in relation to move on.

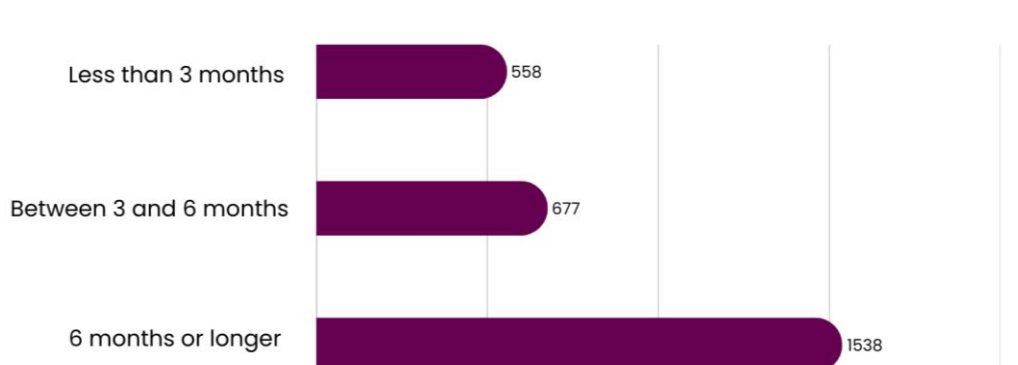
### Key headlines

- 28% (2,773) of people currently being accommodated are waiting to move on from their current provision into more secure, sustainable housing.
- 55% (1,538) of people waiting to move on have been waiting for six months or longer.
- Lack of available social housing (82%), and the lack of private rented sector (PRS) accommodation at Local Housing Allowance rate (73%) are the two main barriers to moving on from homeless accommodation.
- Of those who do move on from their accommodation, most leave to positive destinations. On average 39% of residents move on to social housing, 27% move on to supported housing, and 15% move on to PRS. In contrast, 8% move on to rough sleeping, 5% move on to prison, and 5% turn to sofa surfing.

### Waiting for move on

Accommodation survey respondents reported that they currently had 2,773 residents waiting to move on from their accommodation, of which over half (55%, 1538 residents) had been waiting for six months or longer. This represents 28% of the snapshot of 8,092 people being accommodation on a given night from this survey sample and indicates significant blockages in the system, which if released could substantially increase available bedspaces for those in need.

**Chart 6.1. Number of people waiting for move on by length of time**

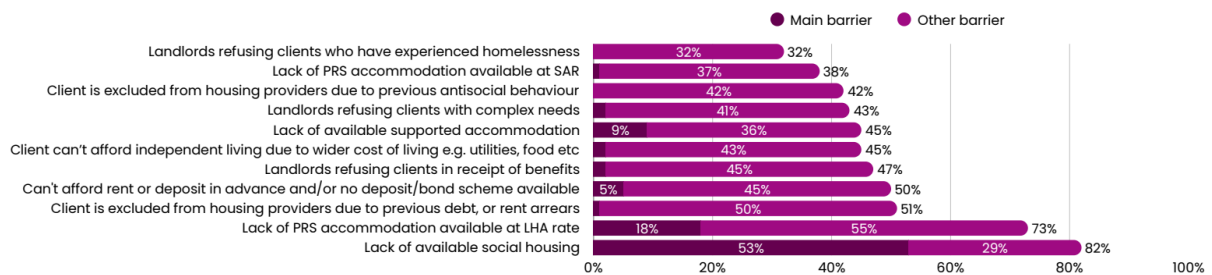


Source: Accommodation Providers Survey, N=161

## Barriers to move on

Survey respondents were asked the reasons why people had not been able to move on from homeless accommodation. Just over 8 in 10 accommodation providers (82%) reported that the lack of available social housing was a barrier to move-on, followed by lack of private rented sector (PRS) accommodation available at LHA rate (73%).

**Chart 6.2. Reported barriers to move on by accommodation providers**

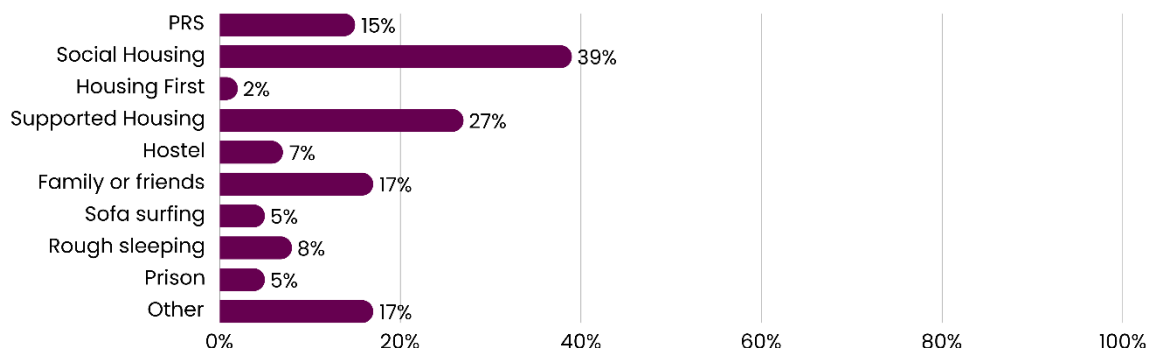


Source: Accommodation Providers Survey, N=161

## Move on destination

Of those who did move on from accommodation, there is a stark range of destinations on leaving provision, ranging from social housing to a return to rough sleeping. Chart 6.3 below shows the average proportion of residents moving on to different destinations based on survey responses. On average, 39% of residents move on to social housing followed by 27% going to supported housing (this could be from a non-supported accommodation provider or to a more suitable form of supported housing). An average of 17% of residents went on to stay with family or friends. A sizeable minority (13%) of people return to homelessness, either sofa surfing or rough sleeping.

**Chart 6.3. Move on destinations**

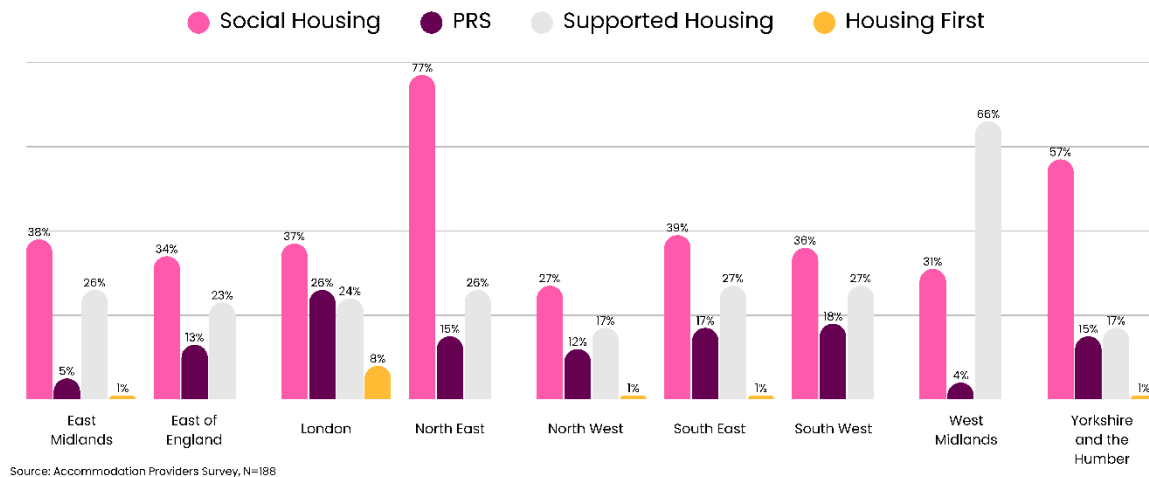


Source: Accommodation Providers Survey, N=188

When looking at move-on destinations regionally, it is most common in almost all regions for people to move on to social housing with the exception of the West

Midlands, which is the only region where more service users move on into supported accommodation (66%). London has the highest levels of move on to PRS (26%), whilst other regions have higher numbers of people moving into supported accommodation compared to PRS. London has a substantially higher rate of people moving into Housing First accommodation (8%) compared to other regions.

**Chart 6.4. Average percentage of positive move-on destinations by region**



Whilst, encouragingly, negative move on is rare, we do still see some regional variation with regards to this. In the South West, on average, individuals are far more likely to return to rough sleeping (14%) than go to prison or sofa surf. However, in the North West and Yorkshire and the Humber providers report higher averages of people going to prison after moving on from their service (9% respectively). It is well evidenced that there is a cycle of reoffending and housing instability, and it has long been a challenge that people at all stages of the criminal justice system face significant barriers to maintaining and securing stable housing. Ensuring people leaving prison have access to suitable housing is essential both for their own wellbeing and to prevent re-offending.

**Table 6.1 Average percentage of negative move on destinations by region**

	Sofa surfing	Rough sleeping	Prison	Total
<b>East Midlands</b>	8%	11%	7%	26%
<b>East</b>	5%	10%	5%	20%
<b>London</b>	3%	6%	4%	13%
<b>North East</b>	6%	5%	3%	14%
<b>North West</b>	6%	5%	9%	20%
<b>South East</b>	4%	8%	1%	13%
<b>South West</b>	6%	14%	5%	25%

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<b>West Midlands</b>	0%	4%	1%	5%
<b>Yorkshire and the Humber</b>	5%	1%	9%	15%

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Source: Accommodation Providers Survey, N=188

## Chapter 7: Conclusion

2025 saw the publication of the long-awaited National Plan to End Homelessness, the Government's roadmap to tackling homelessness. The strategy recognises that the current system is crisis-driven and that the sector faces systemic challenges, a thread which is evident throughout the Support to End Homelessness series. This year's report continues to highlight the sheer and sustained financial pressure frontline services operate under. 71% of both accommodation providers and day centres report that rising costs and financial pressures have had negative implications on service delivery. Day centres face particular financial struggles, with over half of day centres reporting that the lack of inflationary increase in commissioned and grant funded projects means some services are no longer financially viable. This is an alarming trend in service closure and reduction given the increased demand for these services, and the vital role that day centres play as the first port of call for people experiencing homelessness, multiple disadvantage and acute crisis.

The statutory data reveals a stark picture of rising homelessness, with rough sleeping estimates and the number of households in temporary accommodation reaching record levels. An estimated 4,793 people were sleeping rough on a given night in 2025, representing a 171% increase since 2010. On 31 December 2025, 134,210 households were in temporary accommodation. This is an increase of 5% from 31 December 2024, and includes 176,130 children living in temporary accommodation. It is vital that the homelessness strategy delivers much needed change, including the new target to halve long-term rough sleeping, and that local authorities use their new funding to secure the provision of the homelessness support services that offer a lifeline to people experiencing homelessness, from day services to emergency accommodation and supported housing.

Homeless Link began tracking the size and scale of the single homelessness sector in 2008. Since then, the number of accommodation providers has reduced by 46% and the number of bedspaces has reduced by 41%. Despite increases in all forms of homelessness over the last eighteen years, the homelessness sector has seen a steady contraction as funding sources and policy priorities have shifted.

The Review has also tracked how homelessness services are funded and how the funding landscape has changed over time. The findings show accommodation providers continue to rely on Housing Benefit (54%) as their primary source of income, of which 56% is through Enhanced Housing Benefit to provide supported exempt accommodation. A sizable proportion of accommodation providers report experiencing increased scrutiny on supported exempt accommodation funded through Enhanced Housing Benefit by their local authority. This has left many services open to financial risk and closure. The 2025 Autumn Budget announced a Value for Money review of homelessness and supported housing funding to consider how existing funding that supports homelessness and rough sleeping can be improved, with an

explicit aim to improve the quality and supply of supported and temporary accommodation. This coupled with newly announced changes to homelessness funding, including the Homeless, Rough Sleeping and Domestic Abuse grant, has the potential to shift the dial for homelessness accommodation provision and the wider system. The changes to the funding model is a welcome acknowledgement by the Government that funding cuts, removal of ringfencing, and short-term funding cycles have led to many systemic challenges. The consolidated ring-fenced pot of funding is being introduced amidst the incoming arrival of increased scrutiny and regulation for supported housing providers in England, which will likely bring seismic changes to the sector.

Findings in 2025 demonstrate a continued trend of people presenting to services with increased complexity of needs and from diverse populations driven by varied causes of homelessness. Mental health remains the most commonly reported support need amongst accommodation providers (90%), with 100% of day centres reporting high levels of support needs in relation to history of offending, physical ill-health and disability, and alcohol dependency. The commitment of £124m of new investment in supported housing services, and new programmes to support people with multiple disadvantage, mental health, and substance use support needs in the new strategy is very much welcomed.

Despite this, providers faced accessibility barriers when linking their clients into necessary services. Whilst access to mental health support remains a significant challenge, homelessness services also report barriers to adult social care services (88% of accommodation providers and 95% of day centres). Faced with people with acute needs who are unable to access social care support, homelessness services have increasingly stepped in to fill gaps in care provision. This has created a shadow social care sector, delivering support to some of the most vulnerable adults in our society without oversight, input or resource from adult social care. We welcome the Casey Commission, an independent review of adult social care running until 2028. It offers an opportunity to think about where homelessness support fits in the social care landscape and an imperative chance to interrogate the interaction between unmet social care needs and homelessness.

The impact of the lack of affordable housing is evident throughout the 2025 Review. 28% of people being accommodated on a given night were waiting to move on, of which over half (55%) had been waiting for six months or longer. Systemic barriers such as the lack of available social housing and PRS accommodation at LHA rate are causing significant blockages in the system.

*The 2025 Support to End Homelessness: Review of Services Addressing Single Homelessness* highlights the role of frontline homelessness services in responding to the rising demand, changing profile of need, and systemic barriers within the housing and health and social care sectors. Years of stagnant funding and real-term cuts have pushed services to breaking point, services need sustainable funding that enables

them to keep their doors open and continue to provide a lifeline for vulnerable people. To *'get back on track to ending homelessness and rough sleeping'*, all of government must take responsibility to break the cycle of homelessness by delivering fundamental change for the system, shifting to a sustainable model rooted in prevention and long-term support.

## Appendix: Methodology and sampling

The findings in this report are drawn from the following four key data sources.

### **Online survey from 188 accommodation projects (21% response rate)**

An online survey was conducted between September 2025 and November 2025. Of a total available population of 899, 188 (21%) accommodation projects responded and were included for analysis. There were 233 total responses, with 81% meeting the inclusion criteria. Responses were excluded if they were a) a duplicate or b) incomplete (answering less than 25% of the survey).

### **Online survey from 42 day centres (25% response rate)**

An online survey was conducted between September 2025 and November 2025. Of a total available population of 169 services, 42 (25%) day centres responded. There were 54 total responses, with 78% meeting the inclusion criteria. Responses were excluded if they were a) a duplicate or b) incomplete (answering less than 25% of the survey).

For both accommodation providers and day centres together we achieved 90% confidence intervals of  $\pm 5\%$  and stratified each project type by region and local authority. This in turn allowed us to generalise the findings to the wider sector. For accommodation providers we also achieved 85% confidence intervals of  $\pm 5\%$  but poorer response rates amongst day centres in certain regions meant we were not able to achieve 95% confidence intervals.

### **Homeless England database**

This database is managed by Homeless Link and covers information about homelessness services in England. Although the data is not live, it is updated regularly and is the only data source on the number of homelessness services in England. Data on the availability of services and bed spaces were extracted from the Homeless England database, allowing a comparative analysis with previous publications of the Review.<sup>48</sup>

### **Existing data on homelessness trends**

Existing data on homelessness trends, including national statutory homelessness and rough sleeping figures as published by the Ministry of Housing, Communities and Local Government.

## Sampling approach

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<sup>48</sup> All editions of the Support to End Homelessness series are available at: <https://homeless.org.uk/knowledge-hub/annual-review-of-single-homelessness-support-in-england/>

The sample structure was a vital part of this survey. Homeless Link ensured that the profile of the projects interviewed closely represented the profile of the sector's projects (accommodation or day centre) as a whole. For this survey, we achieved 85% confidence intervals of  $\pm 5\%$  for the survey results from accommodation providers as a discrete group, and a 90% confidence interval of  $\pm 5\%$  from the aggregated grouping of accommodation providers and day centres.

Providers were contacted initially by email, with follow up by phone and email. Surveys were conducted online (with the option for telephone if preferred). Each provider was contacted three times via email to invite response.

For accommodation providers only, the available sample was 899 projects. This required 270 surveys to be completed to achieve a 95% confidence interval of  $\pm 5\%$ . We failed to achieve this, with 188 usable respondents. To achieve a 90% confidence interval of  $\pm 5\%$  we required 210 surveys to be completed. We fell just shy of achieving this with 188 usable respondents with an 85% confidence interval at  $\pm 5\%$ .

For accommodation providers and day centres combined, the available sample size of 1,068 projects required 283 surveys to be completed to achieve a 95% confidence interval of  $\pm 5\%$ . We did not achieve this, as 42 day centres and 188 accommodation providers resulted in an overall sample of 230. However, we achieved a 90% confidence interval at  $\pm 5\%$  (requirement target of 218 interviews).

Within each of the two project types, we stratified by region to ensure that there were no unexpected skews in the data which can at times occur within a purely random unstratified sample. Using the original sample, we calculated regional quotas which were set to ensure that the samples from each project type reflected the actual distribution of projects across England.

In addition to achieving a reliable overall evidence base, we also wish to ensure – as far as practical – that we secure a representative sample across all regions of England. However, due to the significantly smaller samples size for each region, it is necessary to accept a higher confidence interval.

For each region a minimum expected target with a margin of error of  $\pm 15\%$  has been calculated, along with an aspirational target of  $\pm 10\%$ . The table below summarises the numbers required for each region based on the available sample size and the total achieved. The South East and London achieved the minimum expected target for accommodation providers and day centres combined. All other regions failed to achieve the target.

	<b>Target AP+DC</b>	<b>Target at +/- 15%</b>	<b>Target at +/- 10%</b>	<b>Total AP</b>	<b>Total DC</b>	<b>Total AP + DC</b>
<b>East</b>	137	33	57	17	3	20

## Homeless Link

<b>East Midlands</b>	74	28	43	16	1	17
<b>London</b>	221	36	68	25	12	37
<b>North East</b>	51	24	34	9	3	12
<b>North West</b>	133	33	57	23	7	30
<b>South East</b>	141	33	58	42	9	51
<b>South West</b>	155	34	60	27	2	29
<b>West Midlands</b>	77	28	43	12	3	15
<b>Yorkshire and the Humber</b>	78	28	44	17	2	19

The survey sample is representative at a lower confidence interval of 85% +/-15% in all regions except the East Midlands and North East, which had a particularly poor response rate in 2025.

## What We Do

Homeless Link is the national membership charity for frontline homelessness services. We work to improve services through research, guidance and learning, and campaign for policy change that will ensure everyone has a place to call home and the support they need to keep it.

## Homeless Link

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[www.homeless.org.uk](http://www.homeless.org.uk)  
@HomelessLink

# Let's End Homelessness Together

