London Gypsy and Traveller Accommodation Needs Assessment (GTANA)

Report

November 2025

RRR Consultancy Ltd

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High Quality Social Research & Training

GREATER LONDON AUTHORITY

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Executive summary

The Greater London Authority (GLA) commissioned this London-wide Gypsy and Traveller Accommodation Needs Assessment (GTANA). This was done in line with a commitment in the London Plan 2021, which in turn reflects a recommendation in the Planning Inspectors' report on the Examination in Public of the Plan.

The main objective of the 2025 London-wide GTANA is to provide a robust and reliable evidence base for London government to use in housing and planning policy development. It assesses the accommodation needs of members of London's Gypsy, Roma, Traveller and Travelling Showpeople (GRTTS) communities.

The 2025 GTANA was developed and undertaken in partnership with a range of stakeholders, including GRTTS communities and London boroughs.

GTANA methodology

The GTANA calculates needs in line with the approach outlined in 'Gypsy and Traveller Accommodation Needs Assessments' (guidance issued by the Department for Communities and Local Government (DCLG), 2007).

As detailed in Chapter 4, the GTANA uses a range of methodologies. In addition to household surveys, it draws on secondary information, including national planning policies and guidance; analysis of GTANAs previously undertaken by London boroughs; previously published data in six borough GTANAs; and analysis of other secondary data including Traveller Caravan Counts (DLUHC/MHCLG); 2011 and 2021 Census data; and data provided by boroughs.

The approach to surveying households was tailored to the particular needs of each GRTTS cohort. It involved in-person surveys with GRTTS households residing on Gypsy and Traveller sites and Travelling Showpeople yards; and online surveys with Gypsy and Traveller households residing in bricks and mortar homes and Roma households.

Surveys were conducted with households residing on Gypsy and Traveller sites in boroughs that had not recently carried out a GTANA. This fieldwork achieved an average response rate of 96 per cent across all boroughs where site surveys took place; and above 90 per cent in each of the 20 Local Planning Authorities (LPAs) (see Table 5.6). There were similar surveys for Travelling Showpeople in three of the five boroughs with yards – but not in Havering, where a GTANA had recently been undertaken. Both surveys gathered data on accommodation needs, satisfaction with sites or yards, access to services, travelling patterns and other matters, providing a holistic view of the communities' needs.

An online survey was designed specifically for Gypsy and Traveller households living in bricks and mortar accommodation. This survey covered reasons for living in bricks and mortar; satisfaction with current accommodation; access to services; travelling patterns; and accommodation needs. The survey was conducted across all London boroughs.

Given the distinct demographic characteristics of the Roma community, a separate online survey was designed. This survey covered awareness of housing rights; affordability of accommodation and services; and accommodation needs. It did not contain questions on travelling patterns. The survey was conducted in all boroughs, and translated into the main languages used by the Roma community in London.

These methods enabled more comprehensive data collection, combining both quantitative and qualitative data, to accurately assess the accommodation needs of the different GRTTS communities.

Key findings from household surveys

Data gathered through the GTANA survey responses, site observations during fieldwork at yards and sites, and analysis of secondary data were used to calculate accommodation needs. Analysis of household survey responses also provides insight into a range of other matters.

Gypsies and Travellers living on sites

Findings from the survey of Gypsy and Traveller households on sites in London indicate that the majority of these households live on social rented sites. A significant proportion (29 per cent) expressed dissatisfaction with their current accommodation. Issues such as poor conditions, overcrowding, and a lack of amenities were common complaints. The condition and quality of sites varied significantly, with some in need of urgent repairs and others in good condition.

Households expressed concerns over the variation in the size and quality of local authority pitches. They reported this sometimes led to conflicts between households over larger pitches. Issues such as difficulties with mail deliveries and mistrust of service providers were common. Whilst most households (91 per cent) were registered with a GP, they reported discrimination in accessing healthcare services. Respondents strongly believed that more residential and transit pitches are needed. Overcrowding and the formation of new households are driving the need for additional residential pitches. Households indicated a clear preference for additional transit provision through negotiated stopping agreements; and, to a lesser extent, showed support for new transit sites.

Regardless of satisfaction levels, Gypsies and Travellers residing on sites emphasised the importance of living with family on sites with sufficient space and good facilities. A common reason households moved to current sites was to be near family and friends. Other Gypsy and Traveller households said they moved to their current site due to a lack of pitches near their desired locations. For many Gypsy and Traveller households living on sites, owning a private site is ideal; but they acknowledged the importance of socially rented sites in London, due to the scarcity and high cost of land. Gypsy and Traveller households residing on sites reported that travelling remains an integral part of their culture, although practical difficulties such as limited stopping places and new legislation are making it harder.

Travelling Showpeople residing on yards

Key findings from the survey of Travelling Showpeople households residing on yards were similar to those from the survey of Gypsies and Travellers living on sites. The majority of Travelling Showpeople households have lived on their yards for over five years, with some plots accommodating multiple generations. Households prioritised living together. They also emphasised the need for sufficient space for storing and maintaining equipment, which is currently limited. Self-employment is common. COVID-19 impacted Travelling Showpeople's ability to work. Travelling Showpeople households reported that they travel primarily for work, but tend to travel less frequently and over shorter distances than in the past.

Overcrowding is a significant issue, with households comprising up to 18 individuals (due to several generations of the same extended family living together), and requiring additional space for both living and equipment storage. Most Travelling Showpeople households (86 per cent) are registered with a GP, though some report experiencing discrimination in accessing healthcare services. Education is highly valued, with all school-age children attending school. Families seek a balance between formal education and children learning their cultural traditions. All households surveyed considered that there is a need for more permanent plots due to overcrowding and additional space for family members and equipment.

Gypsies and Travellers living in bricks and mortar accommodation

Gypsies and Travellers living in bricks and mortar homes do so mainly due to a lack of available pitches, and to be close to family or friends. They indicated that their main reasons for travelling were cultural heritage; visiting family and friends; and attending events. However, they found a lack of suitable stopping places and harassment to be significant issues whilst travelling. Additionally, the COVID-19 pandemic significantly affected travelling patterns, with many respondents reporting reduced travel, due to restrictions.

Over half (53 per cent) of Gypsy and Traveller households living in bricks and mortar homes who were surveyed lived in the social rented sector, and a third rented from private landlords. Many respondents reported dissatisfaction with their current accommodation.

Over a quarter (28 per cent) of Gypsy and Traveller households residing in bricks and mortar homes reported health issues, including mental health, and long-term illnesses. More than two-fifths of respondents (42 per cent) reported being unemployed – this is significantly higher than across London's general population. (Note: the London GTANA survey and 2021 Census data are not directly comparable because they use different categories when capturing employment.) Other respondents were carers; employed full-time or part-time; homemakers; or retired. Almost half of the respondents had school-age children in their households, with most children attending school. Bullying was the primary reason some children did not attend school.

Roma households residing in bricks and mortar accommodation

The household surveys indicated that the most common tenure among Roma households (for 61 per cent) is the private rented sector. Others live with family or friends, or in local authority/housing association accommodation. Satisfaction with current accommodation was mixed; two-fifths were satisfied, and the remainder were either neutral or dissatisfied. Less than half of respondents found their housing costs and utilities fully affordable. Nearly three-quarters had lived in the UK for more than five years, with a similar proportion having lived in London for the same time. Survey responses show that, while Roma households are usually able to access services such as health and education, they face significant barriers to accessing help and advice services.

For Roma households living in bricks and mortar homes, issues such as overcrowding, health problems, and difficulties accessing secure, affordable housing are prominent. It was apparent that Roma survey respondents were not always aware of their housing rights, including eligibility for social housing, eviction processes, security of tenure, protection against harassment, and rights to benefits. Some Roma households reported that they could not cover the costs of housing (such as their rent or mortgage) and necessities (such as food and utilities).

Accommodation needs

This GTANA determines accommodation needs based on the definition of Gypsies and Travellers set out in Planning Policy for Traveller Sites (PPTS) 2024.

The following summarises needs across London, identified in this GTANA, for accommodation of different types between 2022-23 and 2031-32, with figures for the first and second five-year periods. Table 1 shows the need for permanent pitches, Table 2 the need for permanent plots and Tables 3 and 4 the need for bricks and mortar homes.

Table 1: Gypsy and Traveller need for permanent pitches 2022-23 to 2031-32

Period	**Number**
2022-23 to 2026-27	684 (603)
2027-28 to 2031-32	177 (165)
Total	861 (768)

As Chapter 4 explains, for six boroughs this GTANA uses data from their published local GTANAs to calculate needs alongside data from the household surveys. The figures in brackets in Table 1 above represent the London-wide need if – for those six boroughs – solely the accommodation need determined by their GTANA is used (see Chapter 4 and Appendix 13).

Table 2: Travelling Showpeople need for permanent plots 2022-23 to 2031-32

Period	**Number**
2022-23 to 2026-27	66
2027-28 to 2031-32	17
Total	83

Table 3: Gypsy and Traveller need for bricks and mortar homes 2022-23 to 2031-32

Period	**Number**
2022-23 to 2026-27	633
2027-28 to 2031-32	373
Total	1,006

Table 4: Roma need for bricks and mortar homes 2022-23 to 2031-32

Period	**Number**
2022-23 to 2026-27	5,129
2027-28 to 2031-32	2,033
Total	7,162

It is assumed that any need arising within the first five-year period will be met by the end of that period. If this isn't the case, boroughs will need to carry over unmet need to the second five-year period. Any additional supply that is not made available within the first five years should be removed from the supply figures and included as part of the assessed need.

Transit need

Respondents to the stakeholder and household surveys considered there is a need for transit provision in London. Stakeholders highlighted a significant shortage of transit sites across London. Most Gypsy and Travellers (those living on pitches, and in bricks and mortar homes) and Travelling Showpeople who responded to the GTANA household surveys stated that more transit provision is needed in their area. The shortage makes it hard for Gypsies, Travellers and Travelling Showpeople to find temporary stopping places, including when attending events important within their culture.

Analysis of data from the MHCLG Traveller Count (from January 2016 to January 2024) and London GTANA site visits shows a need for 87 transit pitches across London. Each pitch should be sufficiently large to accommodate two caravans.

Negotiated stopping

Survey responses from Gypsy and Traveller households living on sites, and Travelling Showpeople, showed they consider negotiated stopping the best means of increasing transit provision. Gypsies and Traveller households living in bricks and mortar strongly supported this approach.

Structure of the GTANA report

The report is structured in 9 chapters:

- **Chapter 1:** introduces the work and outlines key objectives; groups whose accommodation needs were assessed by the GTANA; stakeholders consulted; and the study area covered.
- **Chapter 2:** outlines the policy and legislative context – in particular the definitions of Gypsies and Travellers, and Travelling Showpeople, used by national and regional government; and how the GTANA uses these.
- **Chapter 3:** analyses secondary data relevant for the assessment, including data on current provision of Gypsy and Traveller pitches and Travelling Showpeople plots to inform the fieldwork undertaken.
- **Chapter 4:** outlines the methodology adopted for the study.
- **Chapter 5:** summarises the main findings from site fieldwork surveys of Gypsy and Traveller households living on Gypsy and Traveller sites and unauthorised encampments. Quantitative and qualitative data are analysed to provide a picture of existing accommodation provision, health, employment, education, patterns of travelling, and current and future accommodation needs.
- **Chapter 6:** summarises the findings from yard fieldwork surveys of Showpeople households living on Travelling Showpeople yards. Quantitative and qualitative data are analysed to provide a picture of existing accommodation provision, health, employment, education, and current and future accommodation needs.
- **Chapter 7:** summarises the findings from the online survey of Gypsy and Traveller households living in bricks and mortar accommodation. Quantitative and qualitative data are analysed to provide a picture of this group's existing accommodation provision, health, employment, education, patterns of travelling, and current accommodation and future accommodation needs.
- **Chapter 8:** summarises the findings from the online survey of Roma households. Quantitative and qualitative data are analysed to provide a picture of households' health, employment, access to services, affordability of housing and living costs, and current accommodation and future accommodation needs.
- **Chapter 9:** provides an overview of the accommodation needs of London's GRTTS communities, and discusses key findings. It also makes suggestions for the GLA, local authorities and others who work with Gypsy and Traveller, Roma, and Travelling Showpeople communities to consider when seeking to meet need.

1. Introduction

Summary

The GLA commissioned this London-wide GTANA to provide a robust and reliable evidence base for London government to use in housing and planning policy development. It assesses the accommodation needs of members of London's GRTTS communities.

The GTANA determines accommodation needs based on the definition of Gypsies and Travellers set out in national planning policy, PPTS 2024.

To achieve the study aims, the research drew on a number of data sources, including results from extensive surveys with members of GRTTS communities living on sites and yards; online surveys with Gypsy and Traveller households and members of the Roma community living in bricks and mortar accommodation; a review of secondary information, including the Ministry for Housing, Communities and Local Government (MHCLG) Traveller Caravan Count, and 2011 and 2021 Census data; and an online survey of key stakeholders. The research provided a range of quantitative and qualitative data, enabling a robust assessment of accommodation needs.

The GTANA was undertaken in collaboration with GRTTS communities and London boroughs. Both were represented on a Steering Group that oversaw the project. Producing the GTANA also involved engagement with stakeholders across London and local authorities in the wider South East.

Study context

1.1 The Planning Inspectors' report of the London Plan 2019 recommended that the Mayor should commit to instigating and leading a London-wide accommodation needs assessment for Gypsies and Travellers. The report recommended that this be done to inform an updated London Plan.

1.2 In March 2021, the GLA published the London Plan 2021. The Plan includes Policy H14 on Gypsy and Traveller accommodation. This policy includes a commitment to undertake a London-wide GTANA.

1.3 The previous London-wide GTANA was undertaken in 2008. London Plan Policy H14 states: "Boroughs should plan to meet the identified need for permanent gypsy and traveller pitches and must include 10-year pitch targets in their Development Plan Documents."

1.4 In 2022, the GLA commissioned RRR Consultancy Ltd (RRR) to undertake a London-wide GTANA to cover the period 2022-23 to 2031-32. As part of the brief, the

GLA made clear that the results would be used as an evidence base for policy development in housing and planning for London government and local authorities.

Key objectives

1.5 Specific objectives of the 2025 GTANA are to:

- provide a comprehensive assessment of need of London's GRTTS communities at the local (32 London boroughs, the City of London, and Old Oak and Park Royal Development Corporation (OPDC)), sub-regional and regional levels, so such assessed need can be addressed, and further provision made
- provide robust evidence to support the implementation of London Plan 2021 Policy H14 on Gypsy and Traveller accommodation, and inform associated local and strategic policy development
- gather data on Gypsy and Traveller households in London using both the PPTS definition and the draft London Plan 2018 definition[1]
- gather data on the accommodation needs of the Roma community
- enable accommodation needs to be quantified in terms of:
    - Gypsy and Traveller residential pitches[2]
    - Travelling Showpeople plots[3]
    - Transit sites and pitches
    - Bricks and mortar dwellings.

(Please see the Glossary at the end of this report for definitions of the terms used above.)

1.6 The scope of the study included drawing on various existing data sources (such as recently published borough GTANAs) and undertaking new qualitative and quantitative research to yield robust results.

1.7 The 2025 GTANA determines accommodation needs based on the definition of Gypsies and Travellers set out in PPTS 2024.[4] This should ensure that the needs of all Gypsies and Travellers are determined. Chapter 2 discusses the PPTS definition more fully. See also Appendix 17.

[1] Following revisions to the PPTS in December 2024, the two definitions are now considered to align.
[2] Gypsy and Traveller sites differ from residential caravan or mobile home sites, in that the former are designated to accommodate Gypsy and Traveller households, whilst residential caravan and mobile homes sites are not.
[3] Travelling Showpeople are sometimes referred to as 'Showmen'.
[4] For six boroughs where information deriving from recently published GTANAs is being used, need figures are based on households that meet the cultural definition.

Groups covered by the GTANA

1.8 The following section describes the groups whose accommodation needs are determined by the GTANA. It should be noted that Romany Gypsies, Irish Travellers and Roma have an ethnic element to their identity; as such, they are protected under the Human Rights Act 1998 and the Equality Act 2010.

Romany Gypsies

1.9 Romany Gypsies have been in Britain since at least 1515, after migrating from continental Europe during the Roma migration from India. The term Gypsy comes from “Egyptian”, the ethnicity that the settled population attributed to early Roma migrants. Linguistic analysis of the Romani language proves that, in reality, Romany Gypsies, like the European Roma, originally came from northern India, probably around the 12th century. French Manouche Gypsies have a similar origin and culture to Romany Gypsies.

1.10 Throughout Britain, there are other groups of Travellers, who may travel – such as Scottish, Welsh and English Travellers. Many of them can trace a nomadic heritage across many generations. They may have married into or from more traditional Irish Traveller and Romany Gypsy families. There were already indigenous nomadic people in Britain when the Romany Gypsies first arrived hundreds of years ago and the different cultures and ethnicities of these groups have, to some extent, merged.[5]

Irish Travellers

1.11 Traditionally, Irish Travellers are a nomadic group of people from Ireland who have a separate identity, heritage and culture from the Gypsy and Traveller community in general. An Irish Traveller presence can be traced back to 12th-century Ireland, with migrations to Great Britain in the early 19th century. Some Travellers of Irish heritage identify as Pavee or Mincéir (words from the Irish Traveller language, Shelta).[6]

Travelling Showpeople

1.12 Travelling Showpeople is a term used to describe those who organise and run fairgrounds. They live on sites (or ‘yards’) in static caravans or mobile homes, along with smaller caravans used for travelling, with their equipment (including rides, kiosks and stalls) kept on the same plot. The site is traditionally used as ‘winter quarters’, from which Showpeople travel during the summer months, although older family members and children may live on the site all year round. Pressure for land in London has led to the closure of Showpeople sites in recent years. This has resulted in more limited employment opportunities for Showpeople, as well as a loss of yards

[5] The Traveller Movement, Romani (Gypsy), Roma and Irish Traveller History and Culture
[6] The Traveller Movement, Romani (Gypsy), Roma and Irish Traveller History and Culture

on which to live. Showpeople do not constitute an ethnic group, but are recognised as occupational travellers with a long tradition and history.

New Travellers

1.13 New Travellers (formerly 'New Age Travellers') is a term used to describe people who chose a nomadic lifestyle through a movement that became popular in the 1970s in Britain. They often travel in groups between fairs and festivals. Few New Travellers live on public sites. They can instead be found on unauthorised sites, particularly in Wales and South West England.[7]

The Roma community

1.14 Historically, the Roma community originated in northern India and settled in Europe (including areas that are now Romania, Slovakia, the Czech Republic and Poland), before migrating to the UK more recently. Culturally, Roma individuals may belong to any one of around 40 different groups and tribes. Since 1945, small numbers of the Roma community arrived in the UK, with some seeking asylum in the 1990s and early 2000s. This was followed by a growth in the UK's Roma population following expansion of the European Union in 2004 and 2007.

1.15 According to a document published in 2023 by Friends, Families and Travellers, and the Roma Support Group (RSG):

> "The majority of Roma speak one of the many Romani dialects as a first language and the language of their European country of origin as a second language. However, their fluency in their second language, as well as in English, varies greatly." [8]

1.16 Most Roma people live in bricks and mortar housing, although experience disproportionate levels of homelessness and overcrowding.

Stakeholders

1.17 The 2025 GTANA was developed and undertaken in partnership with a range of stakeholders, including GRTTS communities and London boroughs.

GRTTS communities

1.18 Given that the main aim of the 2025 GTANA is to determine the accommodation needs of GRTTS communities, it was important that they played a central role. Communities were involved in the GTANA primarily through organisations that

[7] Fordham Research, London Boroughs' Gypsy and Traveller Accommodation Needs Assessment, March 2008
[8] Derived from Friends, Families and Travellers, in partnership with the Roma Support Group, Guidance: Tackling Maternal Health Inequalities in Gypsy, Roma and Traveller Communities, May 2023

represent them. These included London Gypsies and Travellers (LGT); Southwark Travellers' Action Group (STAG); RSG; Roma Organisation for Training and Advocacy (ROTA); the Showmen's Guild of Great Britain; and the Association of Circus Proprietors of Great Britain.

1.19 The roles of these organisations included advising on the methodology for the GTANA, including commenting on draft surveys; producing and distributing promotional material; conducting interviews with GRTTS households residing on sites and yards; and undertaking outreach work with members of London's GRTTS communities to help them complete online household surveys. Members of GRTTS community groups joined the Steering Group that oversaw the GTANA.

London boroughs

1.20 London boroughs played an important role, helping to promote awareness of the GTANA, providing data about local populations and current provision to inform fieldwork, facilitating access to Gypsy and Traveller sites for fieldwork, encouraging members of GRTTS communities to complete online surveys, and providing feedback on draft need figures and methodology. Officers from five local authorities joined the Steering Group that oversaw the GTANA. RRR provided regular progress updates to the Association of London Borough Planning Officers.

Wider South East and neighbouring local authorities

1.21 In the course of work on the 2025 GTANA, RRR consulted some local authorities from the wider South East, including all local authorities adjacent to London. Planning and housing authorities in the wider South East were consulted through the stakeholder survey. The findings from this consultation are discussed in detail in Appendix 16.

Project management

1.22 While day-to-day project management of the 2025 GTANA was undertaken by lead officers from the GLA and RRR, a Steering Group was established to advise and provide guidance on the assessment. As well as the GLA and RRR, the Steering Group consisted of representatives from the London boroughs of Enfield, Hackney, Havering, Kensington and Chelsea, and Southwark; GRTTS representative organisations, including LGT, STAG and RSG; Peabody;[9] and an individual member of the GRTTS community.

1.23 The Terms of Reference outlined the Steering Group's main aims and objectives. GTANA Steering Group members advised on the design of the household surveys; assisted with recruiting interviewers from the GRTTS community; helped promote

[9] A charitable Community Benefit Society that manages social housing across London and the Home Counties.

and publicise surveys conducted for the GTANA; and commented on methodology and the development of this report. It should be noted, however, that some individual members of the GTANA Steering Group do not necessarily endorse all aspects of the methodology or GTANA findings.

Study area

1.24 The following describes the 2025 London GTANA study area and briefly summarises key factors that may impact on providing new accommodation. The study covers the entire Greater London area, consisting of 32 London boroughs and the City of London. OPDC is a separate planning authority that covers part of three London boroughs.[10] London Legacy Development Corporation (LLDC) ceased to be an LPA on 1 December 2024. Accommodation needs identified before this date have reverted to boroughs formerly covered by the LLDC.[11] Accommodation needs arising within OPDC are presented separately from those of the boroughs with areas that form part of the area OPDC covers. A map of the 32 London local authorities, the City of London and the OPDC is shown in Figure 1.1. Local authorities adjacent to London are shown in Figure 1.2.

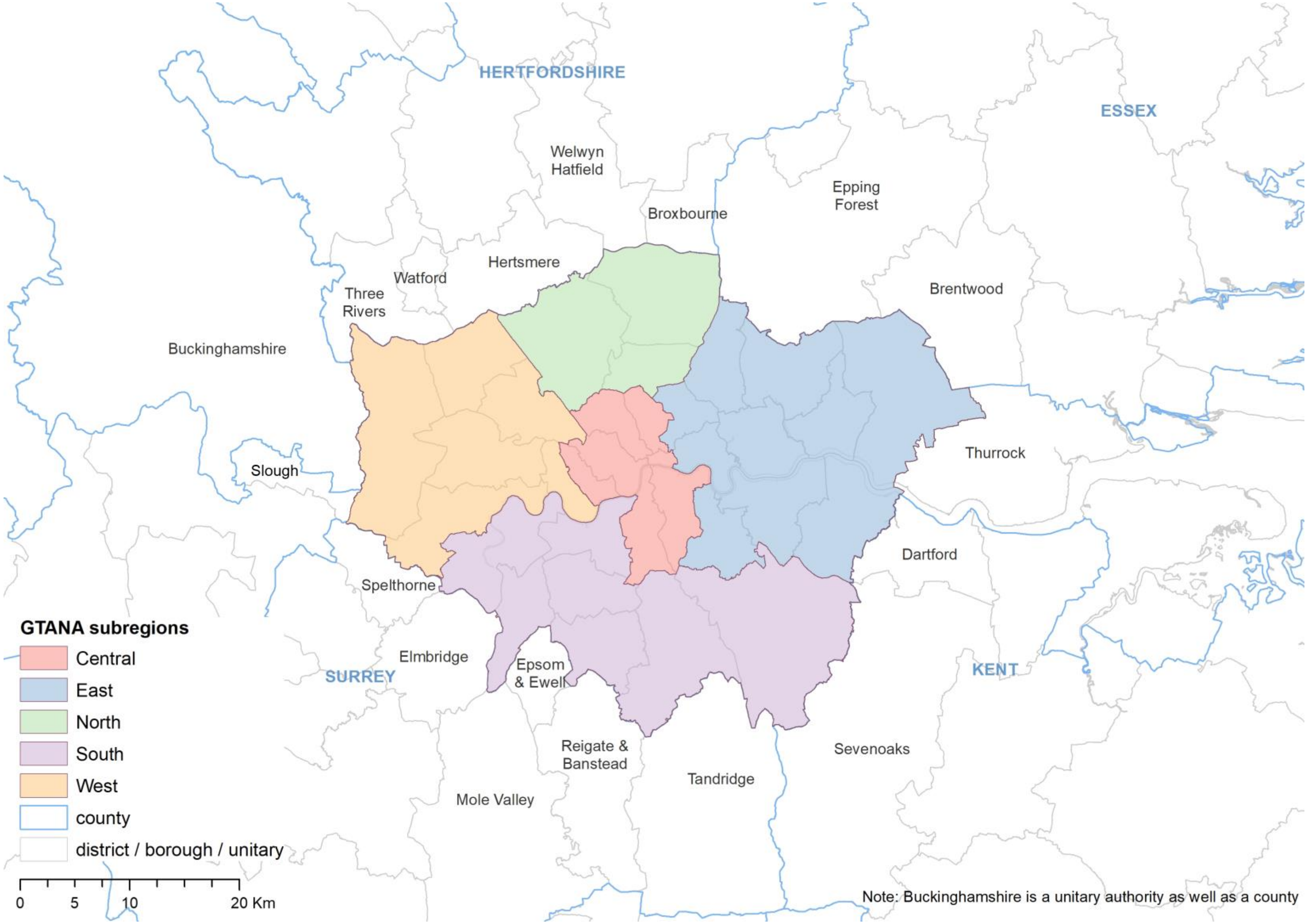
1.25 According to the GLA's 2022-based projections, London's population is projected to grow from 8.9m in 2022 to between 9.3m and 10.3m by 2050.[12] As it does so, employment is projected to increase on average by 33,000 jobs each year, reaching 7.3m jobs by 2050.[13] This growth will bring many opportunities, but it will also lead to increasing and competing pressures on the use of space.

1.26 The highly urbanised character of the city and the high price of land were identified by stakeholders as constraints to the development of new accommodation for GRTTS households (see Appendix 16). Nonetheless, it is important to acknowledge that, as determined by this GTANA, there remains a need for additional accommodation to meet needs of London's GRTTS communities. The requirement for London boroughs to determine the accommodation needs of GRTTS communities derives from the London Plan 2021, which should, in turn, inform the preparation of borough Local Plans. It also derives from national planning and housing policy, guidance and legislation, outlined in Chapter 2.

[10] The OPDC area is situated in the London boroughs of Hammersmith and Fulham; Brent; and Ealing,
[11] The former LLDC area was situated in the London boroughs of Newham; Hackney; Tower Hamlets; and Waltham Forest.
[12] GLA, Trend-based population projections, 2024
[13] GLA, London labour market analysis/draft projections, October 2025

Figure 1.1 Study area

Figure 1.2 Study area with neighbouring wider South East local authorities



2. Policy and legislative context

Summary

This chapter summarises key national and regional housing and planning policies, guidance and legislation that provide the policy and legislative context for the study. These include the National Planning Policy Framework (NPPF); PPTS 2024, MHCLG Draft Guidance (2016); the London Plan 2021; the London Housing Strategy 2018; the Housing and Planning Act 2016; and the Equality Act 2010.

The NPPF and PPTS 2024 set out guidelines that local authorities should follow in planning to meet the accommodation needs of Gypsies, Travellers and Travelling Showpeople. Consideration is given to the requirements on local authorities set out in the London Plan 2021; and the approach to meeting needs set out in the London Housing Strategy 2018.

Gypsy, Roma and Traveller people are protected against discrimination under the Equality Act 2010. The Act confers protections on people based on characteristics such as ethnicity, race, and religion or belief. Gypsies and Travellers and Roma have ethnic characteristics as defined in section 9 of the Equality Act 2010.

Introduction

2.1 It is important to understand the policy and legislative context for assessing and meeting the accommodation needs of London’s GRTTS communities. Therefore, this chapter summarises key national and regional housing and planning policies, guidance and legislation. It also sets out how Gypsies and Travellers, and Travelling Showpeople, are defined for the purposes of this assessment.

National policies, guidance and legislation

National Planning Policy Framework (MHCLG, December 2024)

2.2 The NPPF sets out the government’s planning policies for England, and how it expects these to be applied. According to the NPPF, a sound Local Plan seeks, as a minimum, to meet the area’s objectively assessed needs, and to address ‘the needs of groups with specific housing requirements’.[14] The government published a revised NPPF in December 2024.

2.3 The NPPF references PPTS 2024 (see below) as the relevant document that sets out how Gypsies’ and Travellers’ housing needs should be assessed. The NPPF states that the size, type and tenure of housing needed for different groups in the community (including Travellers) should be assessed and reflected in planning

[14] MHCLG, National Planning Policy Framework, paragraphs 36 and 61, 27 March 2012 (updated 7 February 2025)

policies, in order to deliver a sufficient supply of accommodation. Whilst the NPPF does not explicitly refer to the Roma community, this does not mean that their housing requirements should not be determined.

Planning Policy for Traveller Sites (MHCLG, December 2024)

2.4 PPTS should be read in conjunction with the NPPF. Among its stated aims are to facilitate travelling communities' traditional and nomadic way of life, while respecting the interests of the settled community. It sets out guidelines local authorities should follow to plan for the needs of Gypsies, Travellers and Travelling Showpeople. It mandates local authorities to:

- set targets for developing pitches and plots
- identify and provide sufficient specific, deliverable sites to meet at least five years' supply against these targets
- identify a supply of specific, developable sites, or broad locations for growth, for years 6 to 10 and, where possible, for years 11-15.

It emphasises the need for economically, environmentally and socially sustainable sites.[15]

2.5 PPTS 2024 emphasises the need for local authorities to use evidence to plan positively and manage the development of provision for GRTTS communities. It requires local authorities to work with neighbouring planning authorities to determine targets for transit and permanent pitches and plots. PPTS 2024 states that, in assembling the evidence base necessary to support their planning approach, local authorities should:

- effectively engage with Traveller communities
- co-operate with Traveller groups to prepare and maintain an up-to-date understanding of the likely permanent and transit/temporary accommodation needs of their areas and
- use a robust evidence base to establish accommodation needs to inform the preparation of Local Plans and make planning decisions.

2.6 The PPTS 2024 definition of Gypsies and Travellers is as follows:

> "Persons of nomadic habit of life whatever their race or origin, including such persons who on grounds only of their own or their family's or dependants' educational or health needs or old age have ceased to travel temporarily or permanently, and all other persons with a cultural tradition of nomadism or of

[15] MHCLG, Planning policy for traveller sites, December 2024

living in a caravan, but excluding members of an organised group of travelling showpeople or circus people travelling together as such.”

2.7 The PPTS 2024 definition of Travelling Showpeople is as follows:

> “Members of a group organised for the purposes of holding fairs, circuses or shows (whether or not travelling together as such). This includes such persons who on the grounds of their own or their family’s or dependants’ more localised pattern of trading, educational or health needs or old age have ceased to travel temporarily or permanently, but excludes Gypsies and Travellers as defined above.”[16]

2.8 LPAs are only obliged to plan for pitches and sites for Gypsy and Traveller households who meet the PPTS definition. Unlike Gypsies and Travellers, there is no national planning policy similar to PPTS that defines, for planning purposes, the Roma community.

2.9 This GTANA was commissioned by the GLA on the basis that, as well as the PPTS definition, it reflected in its assessment the draft London Plan (2018) definition of Gypsy and Traveller households. Following the publication of PPTS 2024, which contains an updated definition broader in scope than its predecessor, these definitions are now considered to align.

Housing Act 1985 and Housing and Planning Act 2016

2.10 The Housing and Planning Act 2016 removed the duty on local authorities to assess the accommodation requirements of Gypsies and Travellers. It replaced this with a more general duty to assess the need for sites, where caravans can be situated as part of the assessment of mainstream housing need. The Housing and Planning Act 2016 also amended section 8 of the Housing Act 1985, which required housing authorities to consider housing conditions in their district and the needs of the district with respect to the provision of further housing accommodation. As stated in the DCLG’s draft guidance (2016), discussed below, this means that local authorities must now assess the accommodation needs of people residing in or resorting to the study area in caravans or houseboats. Also, under the Housing Act 1985 and the Housing and Planning Act 2016, it is the responsibility of local housing authorities to assess and consider how to meet the needs of non-travelling Gypsies and Travellers, as part of their wider responsibilities to plan for the accommodation needs of the settled community.

[16] MHCLG, Planning policy for traveller sites, December 2024

DCLG Review of housing needs for caravans and houseboats: draft guidance (March 2016)

2.11 In 2016, DCLG issued draft guidance related to Clause 115 of the (then) 2016 Housing and Planning Bill. Whilst the 2016 DCLG draft guidance is not planning policy, and remains in draft form, it is a material consideration for local housing authorities.[17] The 2016 DCLG draft guidance places a duty on local housing authorities to consider the needs of households residing in caravans or on houseboats where they differ from those of the settled community. It states that, when considering the need for caravans and houseboats, local authorities should include the needs of a variety of residents in differing circumstances, for example:

Caravan and houseboat dwelling households:

- who have no authorised site anywhere on which to reside
- whose existing site accommodation is overcrowded[18] or unsuitable, but who are unable to obtain larger or more suitable accommodation
- who contain suppressed households who are unable to set up separate family units and
- who are unable to access a place on an authorised site or obtain or afford land to develop on.

Bricks and mortar dwelling households:

- whose existing accommodation is overcrowded or unsuitable ('unsuitable' in this context can include unsuitability by virtue of a person's cultural preference not to live in bricks-and-mortar accommodation).

2.12 The 2016 DCLG draft guidance recognises that the needs of those residing in caravans and houseboats may differ from the rest of the population because of:

- their nomadic or semi-nomadic pattern of life
- their preference for caravan and houseboat-dwelling
- movement between bricks-and-mortar housing and caravans or houseboats
- their presence on encampments or developments.

2.13 The 2016 draft guidance suggests that, as these communities' mobility between areas may have implications for carrying out an assessment, local authorities should consider:

[17] According to correspondence between RRR and the MHCLG dated 2 October 2018, the MHCLG intended to finalise the draft guidance.
[18] For example, where family numbers have grown to the extent that there is now insufficient space for the family within its caravan accommodation and insufficient space on the pitch or site for a further caravan (DCLG, 2007 p.25).

- cooperating across boundaries both in carrying out assessments and delivering solutions
- the timing of an accommodation needs assessment
- different data sources.

2.14 The 2016 DCLG draft guidance states that assessments should include, but are not limited to, Romany Gypsies, Irish and Scottish Travellers, New Travellers, and Travelling Showpeople.

2.15 Finally, the 2016 DCLG draft guidance states that, in relation to Travelling Showpeople, assessments should take account of the need to store and maintain equipment, as well as for accommodation. It also advises considering the transience of many Travelling Showpeople.

Equality Act 2010

2.16 Gypsy, Roma and Traveller people are protected against discrimination under the Equality Act 2010.[19] The Act confers protections on those with certain characteristics, including race/ethnicity. Gypsies, Roma and Travellers are ethnic groups as defined in section 9 of the Equality Act 2010. They are, therefore, protected from direct discrimination (section 13), indirect discrimination (section 15), and harassment (section 26) by the Act. This means that, for example, local authorities and housing associations must not discriminate against Gypsy, Roma and Traveller households as their landlords, or in other capacities. (This includes where households live in a caravan or mobile home.) Although some Gypsies and Travellers may earn a living as Travelling Showpeople, Travelling Showpeople as a group do not consider themselves an ethnic group.[20]

Regional policies

London Plan 2021

2.17 The London Plan 2021 was published on 2 March 2021.[21] Policy H14 on Gypsy and Traveller accommodation requires boroughs to plan to meet the identified need for permanent Gypsy and Traveller pitches; and to include 10-year pitch targets in their Development Plan Documents. The London Plan states that boroughs should actively plan for Gypsy and Traveller accommodation needs; and should ensure that new sites are well connected to social infrastructure, health care, education and public transport facilities, and contribute to a wider, inclusive neighbourhood.

[19] This excludes New Travellers, who are not recognised as an ethnic group under Section 9 of the Equality Act 2010.
[20] DCLG, Consultation on revised planning guidance in relation to Travelling Showpeople, January 2007, p. 8.
[21] GLA, London Plan, March 2021

2.18 Policy H14 also states that boroughs should undertake an audit of existing Gypsy and Traveller sites and pitches provided by local authorities, working with residents occupying these to identify:

- areas of overcrowding
- areas of potential extra capacity within existing sites
- pitches in need of refurbishment and/or provision of enhanced infrastructure (including utilities, open space and landscaping).

2.19 The London Plan 2021 explains that, to assist boroughs to meet identified need, Mayoral funding will be available (through the Homes for Londoners Affordable Homes Programmes) for the provision of new pitches, on a single or multi-borough basis, and for refurbishment of existing pitches identified via an audit of existing pitches.[22]

London Housing Strategy

2.20 The London Housing Strategy (2018) emphasises the need for London local authorities to actively plan to meet the accommodation requirements of London's Gypsies and Travellers (see Appendix 17 for further detail).

Local Plans

2.21 The NPPF requires LPAs to produce Local Plans that set out planning policies and proposals for new development, including meeting the accommodation needs of GRTTS communities.[23] All Local Plans in London must be 'in general conformity' with the London Plan under section 24 (1)(b) of the Planning and Compulsory Purchase Act 2004. Whilst Local Plans in London are at different stages, the 2025 London GTANA will provide useful evidence in relation to the accommodation needs of London's GRTTS communities on a London and borough basis.

[22] GLA, London Plan, pp.203-204, March 2021
[23] LPAs in London comprise London boroughs, the City of London and OPDC.

3. Analysis of secondary data

Summary

It is important to have a good understanding of the GRTTS population in London to inform site fieldwork and surveys; and, in particular, to determine a sample framework that will yield robust results. Therefore, this chapter sets out the approach used to estimate the size of the populations for different cohorts considered by the study. In doing so, it considers the different data used to estimate the GRTTS population, and their strengths and weaknesses. It also summarises the scale of provision of Gypsy and Traveller pitches and Travelling Showpeople plots in London. This was used to help determine the number and location of GRTTS households, for the purposes of carrying out site fieldwork.

The data examined in this chapter includes MHCLG Caravan Count data; 2011 and 2021 Census data; GTANAs previously undertaken in London; data on sites and yards supplied by London boroughs; and other data – such as academic research, and research undertaken by GRTTS representative organisations.

Measuring the size of the GRTTS population is difficult. This is due to the nomadic nature of some community members; and a potential reluctance to identify as members of GRTTS communities, for fear of racism or harassment. These factors mean that the 2021 Census may underestimate the Gypsy, Traveller and Roma populations. It is particularly difficult to establish the size of the Roma community, as censuses did not identify them as an ethnic group prior to 2021. The publication of 2021 Census data from February 2022 onwards, and site visits undertaken as part of the household surveys, helped to develop the most robust and reliable estimate of the GRTTS population.

Analysis of 2021 Census data shows differences between the GRTTS communities in terms of the type and tenure of their homes; household composition and size; health and disability; and employment and deprivation. London's Roma households are more likely to live in the private rented sector, whilst Gypsy and Traveller households are more likely to live in social housing (including on caravan pitches provided by social housing landlords).

GTANAs previously undertaken in London provide data on pitch and plot provision. The previous London GTANA is also useful as a baseline to determine how pitch/plot provision and accommodation need has changed since 2008. Between 2008 and 2022, there was a net gain of 48 Gypsy and Traveller pitches and a loss of 63 Travelling Showpeople plots in London. Reasons for this loss include the closure of sites and changes to site layouts, leading to an amalgamation of plots.

Introduction

3.1 To ensure a robust and reliable assessment of accommodation needs, it is important to determine the size of different GRTTS populations – that is, Gypsies and Travellers living on sites; Travelling Showpeople living on yards; Gypsies and Travellers living in bricks and mortar accommodation; and Roma living in bricks and mortar accommodation. This provides the basis for the sample framework for surveys.

3.2 This chapter first identifies and discusses the strengths and weaknesses of the various sources of data used to estimate London's GRTTS populations. It then sets out how the data sources have been used to determine population sizes, as well as to estimate current accommodation provision for GRTTS communities in London and how this has changed since the 2008 London-wide GTANA. This data is not only used to determine the sampling frame, but also provides context for understanding the accommodation needs figures discussed in Chapters 5 to 8.

Secondary data sources used to determine London's GRTTS population and current accommodation provision

Traveller Caravan Count

3.3 The primary data source on the population of Gypsies and Travellers, and Travelling Showpeople, living in caravans is the MHCLG Traveller Caravan Count. The Count has weaknesses, as discussed below, but can be used as a proxy for estimating the number of Gypsy and Traveller households living in caravans, rather than the whole population. The Traveller Caravan Count was used to determine changes in the number of Gypsy and Traveller caravans recorded in London between January 2016 and January 2024.

3.4 The Traveller Caravan Count was introduced in 1979 and places a duty on local authorities in England to undertake a twice-yearly count for of the number of Gypsy and Traveller caravans (rather than pitches) in their area.[24,25] The Count takes place during January and July each year – i.e., in winter, when households are less likely to travel; and during the summer travelling season.

3.5 The Count includes data on the number of caravans located on Gypsy and Traveller sites and Travelling Showpeople yards.[26] It distinguishes between caravans on socially rented authorised, private authorised, and unauthorised pitches.

[24] The Caravan Sites Act 1968 placed a duty on county councils and districts to provide accommodation for Gypsies residing in and resorting to their areas but was repealed by the Criminal Justice and Public Order Act 1994.
[25] In the Caravan Count, OPDC is counted as part of the local authority area that it covers (or, in the case of LLDC, used to cover), rather than separately.
[26] The number of Travelling Showpeople caravans is reported as a separate figure within the annual count data published by MHCLG.

Unauthorised sites and pitches are broken down by whether they are ‘tolerated’ or ‘not tolerated’.[27]

3.6 Count figures are used by MHCLG and local authorities to identify unauthorised encampments and developments, as well as to monitor changes in their numbers over time. Unauthorised encampments include situations where the land is not owned by the occupier, the land is being occupied without the owner’s consent, and as such a trespass has occurred. An encampment can include one or more vehicles, caravans or trailers. Unauthorised developments also include situations where the land is owned by the occupier, or the occupier has the consent of the owner (for example, is tolerated or where no trespass has occurred), but where relevant planning permission has not been granted.[28]

3.7 There are several weaknesses in the reliability of the data. For example, counting practices vary between local authorities across the country, and the practice of carrying out the Count on a single day does not capture the fluctuating number and distribution of unauthorised encampments – i.e., it only records caravans on unauthorised encampments on the day of the Count. Consequently, unusually high or low numbers of caravans recorded on unauthorised encampments on the day of the Count may lead to a distorted understanding of the number in the local area.

3.8 Another weakness of the Count is that some authorities report the number of Travelling Showpeople’s caravans together with those of Gypsies and Travellers, whilst others distinguish between the different groups. Some do not count Travelling Showpeople’s caravans at all.

3.9 Where authorities have not registered a Count, figures are imputed based on the results of previous counts. This may lead to inaccuracies. Due to COVID-19 restrictions, the Count did not take place in July 2020 or January 2021.

3.10 Despite these limitations, the Count provides the only national source of information about numbers and distribution of Gypsy and Traveller caravans. As such, it is useful for identifying trends in the size of the Gypsy and Traveller population living in caravans, if not determining absolute numbers of households.

2011 and 2021 Censuses

Use of Census data

3.11 The national Census is undertaken by the Office for National Statistics (ONS) every 10 years. It provides an understanding of people and households in England and

[27] A local authority may ‘tolerate’ an unauthorised development or encampment, meaning that no enforcement action is currently or likely to be taken, whereas a local authority may be actively working to remove a ‘not tolerated’ unauthorised development or encampment.
[28] MHCLG January 2024 Count of Traveller caravans: Technical notes, 5 June 2024.

Wales. It is used by public bodies, including local authorities, to develop policies and plan services, such as schools, health services, roads and libraries; and to decide how to allocate funds.[29]

3.12 Comparing data from the 2011 and 2021 Censuses helped to determine how London's Gypsy and Traveller population had changed during the 10-year period. Data from the 2011 Census was used to determine the number of Gypsies and Travellers residing in London in June 2022.[30] This data was then used with data on the number of Gypsy and Traveller pitches in London provided by local authorities (see paragraphs 3.29 to 3.30, below) to determine the number of households living on pitches, and in bricks and mortar accommodation.

3.13 2021 Census multivariate statistics showing numbers of households by ethnicity and tenure were not published until March 2023. Sample sizes for this GTANA were determined before that, meaning it was necessary to use 2011 Census data to do so (although 2021 Census data was used to calculate accommodation needs from household surveys). Specifically, the number of Gypsy and Traveller households living on sites, derived from local authority data, was deducted from the total number of Gypsy and Traveller households, as shown by 2011 Census data, to calculate the number of households living in bricks and mortar accommodation (see paragraph 4.29). This number was subsequently revised following site visits and the release of 2021 Census household data (see paragraphs 7.55 to 7.58).

Census response rates

3.14 GRTTS communities may be less likely to complete the Census than the general population. According to the Irish Traveller Movement (2013), it is likely that national Censuses underestimate the Gypsy and Traveller population for a range of reasons:

- the marginalisation and discrimination these communities face on a regular basis, leading to mistrust of official processes
- low educational attainment and poor literacy skills limiting people's ability to understand and complete the forms
- failure of the ONS to engage marginalised communities, especially those living on unauthorised sites.[31]

3.15 There may be further reasons for lower completion rates in the 2021 Census. It was 'digital-first' – i.e., it prioritised data collection online. While Census staff offered paper questionnaires and other support with completing forms, it may still be the

[29] ONS, About the Census, 19 July 2022
[30] Multivariate household data from the 2021 Census was not published until March 2023.
[31] Irish Traveller Movement in Britain, Gypsy and Traveller Population in Britain and the 2011 Census, August 2013

case that the digital-first approach meant that some GRTTS households were not able to complete the Census.[32]

3.16 According to the ONS (2015), 89.5 per cent of Gypsy and Traveller households in England and Wales completed the 2011 Census (compared to a response rate of 94 per cent of all households).[33] However, only a quarter (25 per cent) of respondents to the survey of Gypsy and Traveller households living in bricks and mortar, undertaken for the 2025 GTANA, stated that someone in their household had completed the 2021 Census survey. This suggests that the 2021 Census may underestimate the number of Gypsy and Traveller households residing in London.

3.17 The same may be true in relation to Census figures on London's Roma population. However, there is no equivalent data in relation to Roma households' response rates to the 2011 Census, as the ethnic category was only introduced in the 2021 Census. Similarly to Gypsies and Travellers, only a quarter (26 per cent) of respondents to the survey of Roma households undertaken for the 2025 GTANA stated that someone in their household had completed the 2021 Census survey. Again, this suggests that the 2021 Census may underestimate the number of Roma households residing in London.

3.18 Despite the limitations of Census data for establishing the size of London's GRTTS communities, it remains the most authoritative and comprehensive data source available regarding these populations. Even with an underestimated population size, the relative proportions and characteristics of the sample can still be representative of broader trends within the GRTTS communities. So, while the 2021 Census might underestimate the GRTTS population, the data still provides a useful foundation for determining sample sizes, and the most robust basis available for this.

3.19 The 2021 Census recorded a decrease of 1,167 people in London identifying as Gypsies or Travellers, compared with the number recorded in the 2011 Census (see Appendix 1). The decrease may reflect GRTTS households being less likely to complete the 2021 Census survey than the 2011 Census (because of the emphasis on digital data collection), rather than an actual decrease in population. It is also possible that any decline captured in the 2021 Census figures was due to households temporarily moving out of London in 2020, in response to the COVID-19 pandemic, and not having returned by the time of the Census in March 2021.

Age

3.20 Analysis of 2021 Census data shows that there are substantial differences between Gypsy and Traveller, and Roma households; and between those groups and all

[32] According to the ONS, 88.9 per cent of household responses to Census 2021 in England and Wales were completed online. See: ONS, Delivering the Census 2021 digital service, 4 October 2021.
[33] ONS, 2011 Census: General Report for England and Wales, 2015

households residing in London. As Table 3.1 shows, there are differences in terms of the age of the 2021 Census 'Household Reference Person' (HRP) (a person who serves as a reference point, mainly based on economic activity, to characterise a whole household) by ethnic group. Over two-fifths (43 per cent) of Roma HRPs were aged 34 or under, compared to just under a third (30 per cent) of Gypsy and Traveller HRPs, and a fifth (20 per cent) of all London HRPs.

Table 3.1 Age of Household Reference Person by ethnicity

Age	**Roma**		**Gypsy & Traveller**		**All households**	
	Number	*%*	*Number*	*%*	*Number*	*%*
15 or under	8	<1%	0	0%	500	<1%
16 to 24	867	6%	213	8%	91,698	3%
25 to 34	5,378	37%	557	22%	598,336	17%
35 to 49	5,825	40%	847	34%	1,109,014	32%
50 to 64	1,944	13%	616	24%	943,296	28%
65 or over	463	3%	293	12%	681,035	20%
Total	14,485	100%	2,526	100%	3,423,879	100%

Accommodation type

3.21 There are differences between Roma, Gypsy and Traveller, and all London households regarding housing type. Table 3.2 shows that around a tenth (9 per cent) of Gypsy and Traveller households in London recorded by the 2021 Census live in a caravan or mobile structure; but this is the case for only a few Roma households. There are significant differences in terms of the proportion of Roma households residing in a flat, maisonette or apartment (75 per cent), compared to Gypsy and Traveller households (49 per cent), and all London households (54 per cent).

Table 3.2 Accommodation type by ethnicity

	Roma		**Gypsy & Traveller**		**All households**	
	Number	*%*	*Number*	*%*	*Number*	*%*
Caravan or mobile structure	22	<1%	220	9%	4,410	<1%
Flat, maisonette or apartment	10,794	75%	1,234	49%	1,842,827	54%
Detached house or bungalow	865	6%	228	9%	208,066	6%
Semi-detached house or bungalow	1,423	10%	433	17%	636,062	19%
Terraced house or bungalow	1,347	9%	422	17%	727,616	21%
Total	14,451	100%	2,537	100%	3,418,981	100%

Tenure

3.22 According to the 2021 Census, over three-quarters of Roma households (77 per cent) live in the private rented sector, compared to just over a third of Gypsy and Traveller households (34 per cent) and just under a third (30 per cent) of all London households. More than half (51 per cent) of Gypsy and Traveller households live in the social rented sector, compared to under a tenth (8 per cent) of Roma households and over a fifth (23 per cent) of all London households (Table 3.3).

Table 3.3 Tenure by ethnicity

	Roma		**Gypsy & Traveller**		**All households**	
	Number	*%*	*Number*	*%*	*Number*	*%*
Owns outright	741	5%	194	8%	710,044	21%
Owns with a mortgage or loan	1,451	10%	169	7%	890,966	26%
Private rented	11,100	77%	872	34%	1,031,858	30%
Social rented	1,171	8%	1,297	51%	790,937	23%
Total	14,463	100%	2,532	100%	3,423,805	100%

Household composition

3.23 There are differences between different ethnic groups in terms of household composition. According to the 2021 Census, Roma households are more likely to consist of 'other' household types, such as student households and unrelated adults (34 per cent), compared to Gypsy and Traveller households (14 per cent), and all London households (14 per cent). Gypsy and Traveller households are more likely to consist of lone-parent households (33 per cent), compared with Roma households (6 per cent), and all London households (13 per cent) (Table 3.4).

Table 3.4 Household composition by ethnicity

	Roma		**Gypsy & Traveller**		**All households**	
	Number	*%*	*Number*	*%*	*Number*	*%*
One-person household	3,506	24%	704	28%	1,001,975	29%
All aged 66+	63	<1%	31	1%	148,217	4%
Couple family household	5,167	36%	610	24%	1,326,594	39%
Lone-parent household	871	6%	841	33%	453,939	13%
Other household types	4,874	34%	352	14%	493,190	14%
Total	14,481	100%	2,538	100%	3,423,915	100%

Household size

3.24 According to the 2021 Census, there are fewer differences between the different ethnic groups in terms of household size. Roma households are slightly less likely to consist of one person (24 per cent), compared to Gypsy and Traveller (28 per cent) and all London households (29 per cent). Gypsy and Traveller households are slightly more likely to consist of four or more people (29 per cent), compared with Roma households (24 per cent) and all London households (24 per cent) (Table 3.5).

Table 3.5 Number of people in household by ethnicity

	Roma		**Gypsy & Traveller**		**All households**	
	Number	*%*	*Number*	*%*	*Number*	*%*
1 person	3,506	24%	704	28%	1,001,975	29%
2 people	4,798	33%	700	28%	1,007,479	29%
3 people	2,741	19%	407	16%	587,621	17%
4 or more people	3,439	24%	727	29%	826,791	24%
Total	14,484	100%	2,538	100%	3,423,866	100%

Health and disability

3.25 There are significant differences between ethnic groups in terms of health and disability. According to the 2021 Census, around a quarter (24 per cent) of Gypsy and Traveller HRPs described their health as ‘bad or very bad’, compared to only a small proportion of HRPs from Roma households (3 per cent), and all London households (7 per cent). Over nine-tenths (91 per cent) of Roma HRPs described their health as ‘very good or good’, compared to Gypsy and Traveller households (53 per cent), and all London households (79 per cent) (Table 3.6).

Table 3.6 Health by ethnicity (HRPs)

	Roma		**Gypsy & Traveller**		**All households**	
	Number	*%*	*Number*	*%*	*Number*	*%*
Bad or very bad health	418	3%	611	24%	222,866	7%
Fair health	902	6%	581	23%	500,608	15%
Very good or good health	13,164	91%	1,345	53%	2,700,394	79%
Total	14,484	100%	2,537	100%	3,423,868	100%

3.26 Similarly, according to 2021 Census, over two-fifths of Gypsy and Traveller HRPs (43 per cent) are disabled, compared to only a small proportion of Roma HRPs (6 per cent) and just under a fifth of all London HRPs (18 per cent) (Table 3.7). However, as discussed at paragraph 3.20, above, this may be partly due to members of Roma households being, on average, younger than members of Gypsy and Traveller households.

Table 3.7 Disability by ethnicity (HRPs)

	Roma		Gypsy & Traveller		All households	
	Number	*%*	*Number*	*%*	*Number*	*%*
Disabled	889	6%	1,080	43%	603,641	18%
Not disabled	13,583	94%	1,450	57%	2,820,250	82%
Total	14,472	100%	2,530	100%	3,423,891	100%

Deprivation

3.27 The 2021 Census determines deprivation using four household characteristics: education, health, employment and housing.[34] For example, a household is classified as deprived in the housing dimension if the household's accommodation is overcrowded, is in a shared dwelling, or has no central heating. As Table 3.8 shows, over four-fifths (85 per cent) of Gypsy and Traveller households were described as deprived, compared to over half (56 per cent) of Roma households, and just over half (51 per cent) of all London households.

Table 3.8 Household deprivation by ethnicity

	Roma		Gypsy & Traveller		All households	
	Number	*%*	*Number*	*%*	*Number*	*%*
Household is not deprived	6,173	44%	388	15%	1,645,472	49%
Deprived in 1 dimension	5,708	39%	744	29%	1,126,423	33%
Deprived in 2 dimensions	2,055	14%	766	31%	493,122	14%
Deprived in 3 dimensions	477	3%	544	21%	145,786	4%
Deprived in 4 dimensions	67	<1%	93	4%	13,102	<1%
Total	14,480	100%	2,535	100%	3,423,905	100%

Employment

3.28 According to the 2021 Census, Roma HRPs are more likely to be employed (80 per cent), compared with HRPs from Gypsy and Traveller households (35 per cent) and all London households (66 per cent). Gypsy and Traveller HRPs are more likely to be economically inactive (57 per cent), compared with those from Roma households (9 per cent) and all London households (26 per cent) (Table 3.9).

[34] ONS, Household deprivation variable: Census 2021

Table 3.9 Employment by ethnicity (HRPs)

	Roma		Gypsy & Traveller		All households	
	Number	*%*	*Number*	*%*	*Number*	*%*
Employed	11,931	80%	922	35%	2,336,809	66%
Unemployed	467	3%	83	3%	93,904	3%
Full-time student	1,188	8%	122	5%	176,874	5%
Economically inactive	1,347	9%	1,482	57%	909,636	26%
Does not apply	8	<1%	0	0%	500	<1%
Total	14,941	100%	2,609	100%	3,517,723	100%

Data provided by London local authorities

3.29 London boroughs hold useful data regarding GRTTS accommodation provision in London, particularly in relation to Gypsy and Traveller sites, and Travelling Showpeople yards. In summer 2022, RRR requested the following data from London boroughs:

- the number and location of unauthorised encampments occurring in the borough since January 2019
- the number of households on current waiting lists in relation to Gypsy, Traveller and Travelling Showpeople sites/yards owned or managed by the local authority
- current site/yard provision in the borough (authorised pitches and plots) including pitch and plot numbers, addresses and postcodes
- unauthorised developments, including tolerated, not tolerated, and sites or yards for which planning permission has been refused
- any planned future pitches and plots – i.e., those with planning permission but yet to be developed.

3.30 Borough data provided an up-to-date understanding of GRTTS accommodation provision across London. However, like MHCLG Traveller Caravan Count data, this data has weaknesses. Whilst most boroughs responded to requests for data, some did not. This meant that data regarding site/yard provision had to be gleaned from documents such as previously undertaken GTANAs. Also, site/yard visits undertaken as part of the household interviews conducted for this assessment confirmed that some data supplied by boroughs was inaccurate, for example, in terms of over- or under-estimating pitch/plot numbers (site/yard visits were used to confirm the number of occupied and vacant pitches/plots). Few boroughs provided data on unauthorised encampments or site/yard waiting lists, meaning that analysis of this data was not possible on a London-wide basis.

GTANAs previously undertaken in London

3.31 Along with data provided by London boroughs, GTANAs previously undertaken in London provide data on pitch/plot provision. The previous London GTANA is also useful as a baseline to determine how pitch/plot provision and accommodation need has changed since 2008. However, it is more difficult to determine changes in Travelling Showpeople plot provision between 2008 and 2022 than Gypsy and Traveller provision. This is because the 2008 GTANA estimates the number of Travelling Showpeople households residing on yards, rather than reporting the number of plots. (More than one household may live on a plot.)

3.32 Since the last London GTANA was published in 2008, a further 35 GTANAs covering areas of London have been published. Whilst most of the GTANAs were undertaken on a single-borough basis, some were undertaken jointly between neighbouring authorities (such as the West London Alliance GTANA, which assessed accommodation needs across six local authorities, mainly in west London).[35] All of them have been undertaken either internally by boroughs, or by one of three consultancies: ORS, Arc4 or RRR.

3.33 As highlighted in Appendix 2, the 35 local GTANAs differ widely in terms of the different population groups (Gypsies and Travellers, Travelling Showpeople, and Roma) and accommodation types (sites/pitches, yards/plots, transit provision, and bricks and mortar accommodation) included.

3.34 The 35 local GTANAs all assessed the accommodation needs of Gypsies and Travellers residing on sites/pitches, although relatively few considered the accommodation needs of GRTTS communities residing in bricks and mortar accommodation. Similarly, relatively few of the GTANAs published since 2008 assess the accommodation needs of Travelling Showpeople. (However, this may be because Travelling Showpeople are not present in all local authority areas, and so some local authorities chose not to assess their needs.) Out of the 35 GTANAs reviewed as part of this assessment, the London GTANA (2008) was the only one to comprehensively assess the accommodation needs of all the different GRTTS groups and determine need for all accommodation types.

Estimating the Gypsy and Traveller population

Introduction

3.35 Some data is available regarding the population of London's Gypsy and Traveller community: LGT estimates that there are around 30,000 people in London who identify as Gypsies or Irish Travellers.[36] However, it can be difficult to estimate accurately. This is partly because of the number of different definitions that exist, but mainly because of a lack of information about the number of Gypsies and Travellers living in bricks and mortar accommodation.

[35] West London Alliance GTANA (2018) was undertaken on behalf of Barnet, Brent, Ealing, Harrow, Hillingdon, and Hounslow.
[36] See: LGT, LGT maps London for the community, 6 November 2017

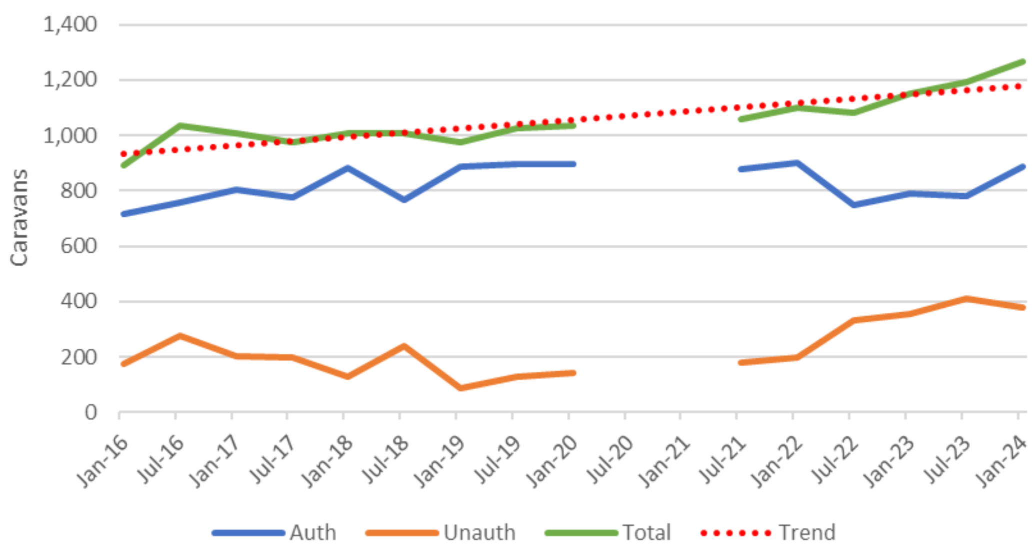
3.36 Estimates produced for DCLG suggest that, in 2007, at least 50 per cent of the national Gypsy and Traveller population were living in bricks and mortar housing.[37] LGT estimated that in 2017, around 85 per cent of Gypsy and Traveller households in London lived in housing, or on roadside encampments, because pitches are overcrowded, unsuitable or unavailable.[38]

Traveller Caravan Count

3.37 Figure 3.1 shows that the total number of caravans recorded in London varied between January 2016 and January 2024. A total of 893 caravans were recorded in London in January 2016, compared to 1,264 in January 2024 (see Appendix 5 for MHCLG Caravan Count January 2024 for London boroughs). The red dotted trend line shows that the total number of caravans recorded by the MHCLG Count in London increased over the eight-year period. Similarly, the number of caravans recorded on authorised pitches has increased over that period, ranging from a low of 716 caravans recorded in January 2016 to a high of 902 in January 2022.

3.38 The number of caravans recorded on unauthorised pitches varied over the eight-year period, ranging from a low of 88 caravans recorded in January 2019, to a high of 409 in July 2023.

Figure 3.1 Traveller Caravan Count in London Jan 2016-Jan 2024



2011 and 2021 Censuses

3.39 Both the 2011 and 2021 national Censuses included the category 'Gypsy or Irish Traveller' in the question regarding ethnicity. Table 3.10, below, shows the total Gypsy and Traveller population in London as derived from responses to this question

[37] DCLG, Gypsy and Traveller Accommodation Needs Assessments, paragraph 63, p.18, October 2007. This guidance was withdrawn in December 2016.
[38] LGT, cited in GLA Gypsy and Traveller Accommodation Topic Paper 2017

in both Censuses. According to this data, in 2011, there were 8,196 Gypsies and Travellers residing in London, representing around 0.1 per cent of London's total population, compared to 7,029 in 2021, representing around 0.08 per cent of London's population (see Appendix 1).[39]

Table 3.10 London Gypsy and Traveller Population 2011 and 2021

Census	2011	2021	Difference
All London residents	8,173,941	8,799,725	625,784
Gypsy or Irish Traveller	8,196	7,029	-1,167
%	0.1%	0.08%	-0.02%

Housing tenure

3.40 Table 3.11 shows the number and tenure of Gypsy and Traveller households recorded by the 2011 and 2021 Censuses – including households residing on sites, and those in bricks and mortar accommodation. As with the population figures discussed above, the number of Gypsy and Traveller households recorded by the national Censuses decreased from 2,874 in 2011 to 2,532 in 2021 (Table 3.11). This represents a decrease of 342 households, or 14 per cent. The decrease may be for the same reasons suggested above, at paragraphs 3.14-3.19.

Table 3.11 London's Gypsy and Traveller households by tenure 2011 and 2021

	Social rented		Private rented		Owned		Total	
	Number	*%*	*Number*	*%*	*Number*	*%*	*Number*	*%*
2011	1,391	48%	984	34%	499	17%	2,874	100%
2021	1,297	51%	872	34%	363	14%	2,532	100%
Difference	-94	3%	-112	0%	-136	-3%	-342	0%

3.41 In summary and as outlined above, it can be difficult to accurately estimate London's Gypsy and Traveller population. According to different sources, it is estimated that between 50 per cent[40] and 85 per cent[41] of London's Gypsy and Traveller population live in bricks and mortar housing. The MHCLG Traveller Count shows an increase in the number of Gypsy and Traveller caravans recorded in London between January 2016 and January 2024. However, the Censuses show an overall decrease in the size of the Gypsy and Traveller population and number of households residing in London between 2011 and 2021.

Estimating the Travelling Showpeople population

3.42 The 2021 Census does not record Travelling Showpeople as a separate (ethnic) category, so it is not possible to estimate the population using that data source. However, the MHCLG Traveller Count does record the number of Travelling

[39] See: ONS 2011 Census Table KS201EW Ethnic Group, last updated 30 January 2013
[40] Shelter, Good Practice Guide: Working with housed Gypsies and Travellers, February 2008
[41] GLA, GLA Gypsy and Traveller Accommodation Topic Paper 2017

Showpeople caravans every January (albeit with the limitations of the Count discussed above). As indicated by Table 3.12, 77 caravans occupied by/belonging to Travelling Showpeople were recorded in London in January 2016, compared to a peak of 231 in January 2020, and 152 in January 2024. This includes caravans on both authorised and unauthorised plots. It should be noted that the figures in Table 3.12 denote the number of caravans occupied by Travelling Showpeople and not the Travelling Showpeople population.

Table 3.12 DLUHC Travelling Showpeople Caravan Count, January 2016 to January 2024

	2016	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Authorised	4	105	177	181	231	192	4	197	152
Unauthorised	73	77	0	0	0	0	73	0	0
Total	77	182	177	181	231	192	77	197	152

Estimating the Roma population

3.43 The size of the Roma community is more difficult to determine than that of Gypsy, Traveller and Travelling Showpeople communities, due to a lack of data. Based on a range of evidence, RSG estimated that there are at least 7,000 Roma people residing in east London, with similar populations in north, west and south London. This equates to an estimated total of around 28,000 Roma people residing in London. Research undertaken by Brown (2013) estimated the London Roma population at 35,997 people.[42] The RSG also estimated that most of these households live in bricks and mortar accommodation.

3.44 The 2011 Census did not include a 'Roma' ethnic category. Also, GTANAs conducted in London have not determined the accommodation needs of the Roma population (see Appendix 2). So, recent GTANAs cannot be used to help estimate the size of London's Roma population.

3.45 The 'Roma' ethnic category was first used by the 2021 Census. The initial data, released in October 2021, indicated that there were 37,690 members of the Roma community living in London in March 2021 (see Appendix 6). However, the Census data on Roma households was not yet published when the GTANA surveys were being planned. Therefore, for this purpose, the number of Roma households was estimated by dividing this number by the average Roma household size according to the 2008 London GTANA (5.2 persons). This determined that, in March 2021, there were approximately 7,248 Roma households residing in London (i.e., 37,690 divided by 5.2, arriving at a total of 7,248).

[42] Philip Brown, Lisa Scullion, and Philip Martin at the University of Salford, Migrant Roma in the United Kingdom, 2013

3.46 Multivariate 2021 Census data published by the ONS in March 2023 showed that the number of Roma households was 14,480 (much higher than the original estimate), with an average household size of 2.6 persons. However, this only became apparent after the sampling frame for this GTANA survey had been determined (see paragraphs 4.32 to 4.34).

3.47 To summarise, it is apparent that, as with Gypsy and Traveller households, it can be difficult to accurately estimate the number of Roma households living in London. Census 2021 data published in March 2023 shows that the number of Roma households residing in London (14,480) is around double the original estimate for this GTANA (7,248) (see paragraphs 4.32 to 4.34).

Gypsy and Traveller pitch provision in London

3.48 Data provided by boroughs was used to help determine the number of Gypsy and Traveller pitches in London. Analysis of this data helped to determine the number of site fieldwork interviews to be undertaken with members of GRTTS households residing on sites. Figures were subsequently confirmed by site visits undertaken as part of the household surveys and further correspondence with boroughs.

3.49 Table 3.13 shows that, in June 2022, there were a total of 743 Gypsy and Traveller pitches in London. (See Appendix 7 for current pitch provision by London borough.) Over half (68 per cent) of Gypsy and Traveller pitches in London are owned or managed by local authorities or housing associations; about a fifth (19 per cent) are situated on unauthorised developments; and about an eighth (13 per cent) are privately owned. Three pitches (less than one per cent) are situated on land privately owned with temporary planning permission – i.e., planning permission for a limited period.[43]

Table 3.13 Gypsy and Traveller pitches in London, June 2022

Type	**Number**	**%**
Local authority/housing association owned and/or managed	504	68%
Privately owned	94	13%
Unauthorised pitches	142	19%
Temporary authorised permission	3	<1%
Total	743	100%

3.50 Analysis of the pitch provision by London borough shows that there are considerable differences in authorised pitch provision between London boroughs. As shown by Table 3.14, six of the 32 boroughs and the City of London (21 per cent) do not contain any authorised pitches, whilst three (9 per cent) contain between one and 10 authorised pitches. Eleven local authorities (34 per cent) contain between 11 and 20

[43] Please see Appendix 7 for the number of pitches by local authority.

authorised pitches. Five (15 per cent) contain between 21 and 30 authorised pitches, whilst seven (21 per cent) contain 31 or more authorised pitches.

3.51 Similarly, there are differences in the number of unauthorised developments recorded by London local authorities. Whilst 142 unauthorised pitches were recorded in London in 2022, they were mainly concentrated in two boroughs: 107 in Havering, and 34 in Bromley. There was also one unauthorised pitch in Lambeth (see Appendix 7).

Table 3.14 Number of Gypsy and Traveller pitches in London, by borough, June 2022

Number of pitches	Number of boroughs	%
0 authorised pitches	7	21%
1-10 authorised pitches	3	9%
11-20 authorised pitches	11	34%
21-30 authorised pitches	5	15%
31+ authorised pitches	7	21%
Total	33	100%

3.52 Table 3.15 shows the spatial distribution of pitches across the London sub-regions.[44] It shows that the largest proportion of Gypsy and Traveller pitch provision in 2022 was in the east sub-region (34 per cent), with slightly smaller proportions located in the south (29 per cent), west (22 per cent), and central (13 per cent) sub-regions. However, only a small proportion of pitch provision (2 per cent) is located in the north sub-region.

Table 3.15 Spatial distribution of authorised Gypsy and Traveller pitches in London June 2022

Sub-region	Local authority/ housing association	Privately owned/rented	Pitches with temporary planning permission	Total	%
East	169	36	0	205	34%
South	129	45	3	177	29%
West	118	13	0	131	22%
Central	78	0	0	78	13%
North	10	0	0	10	2%
Total	504	94	3	601	100%

[44] For the purposes of this GTANA, the London sub-regions are as follows:

- Central London: the City of London, Camden, Islington, Kensington and Chelsea, Lambeth, Southwark, and Westminster.
- East London: Barking and Dagenham, Bexley, Greenwich, Hackney, Havering, Lewisham, Newham, Redbridge, Tower Hamlets, and Waltham Forest.
- North London: Barnet, Enfield, and Haringey.
- South London: Bromley, Croydon, Kingston upon Thames, Merton, Sutton, and Wandsworth.
- West London: Brent, Ealing, Hammersmith and Fulham, Harrow, Hillingdon, Hounslow, and Richmond upon Thames.

Changes in Gypsy and Traveller pitch provision between 2008 and 2022

3.53 Identifying changes in pitch provision between 2008 and 2022 helps provide context for the accommodation need figures established by this GTANA. Tables 3.16 and 3.17 compare the number of pitches recorded by the London GTANA (2008) with current pitch provision using borough data. In 2008, there were 553 authorised residential pitches, and 80 pitches located on unauthorised sites.[45] The latter included 44 households residing on unauthorised developments and 36 on unauthorised encampments. (Please note that while Appendix 7 includes all 80 pitches, Table 3.16 omits the 36 unauthorised encampments because it is assumed they were temporary. The 2022 unauthorised figures do not include unauthorised encampments.)

3.54 Table 3.17 shows that there was an increase of 88 authorised pitches between 2008 and 2022 (of which three pitches have only temporary planning permission). However, analysis of data in Appendix 7 (summarised in Table 3.18) shows that, in five boroughs, there was a decrease of 40 pitches, leading to a net additional increase of 48 authorised pitches. Table 3.16 also shows that the number of unauthorised developments in London has increased over the 14-year period from 44 (not including encampments) in 2008 to 142 in 2022, an increase of 98 unauthorised pitches.

Table 3.16 Comparison of Gypsy and Traveller pitches in 2008 London GTANA and London Borough data 2022

Type	**2008**	**2022**	**Difference**
Residential pitches	553	601	48
Unauthorised development pitches	44	142	98
Total	597	743	146

Table 3.17 Boroughs where authorised pitch provision increased between 2008 and 2022

Borough	**2008**	**2022**	**Increase**
Havering	7	28	21
Kingston upon Thames	18	35	17
Sutton	26	40	14
Hillingdon	20	32	12
Hounslow	20	30	10
Greenwich	39	44	5
Croydon	15	20	5
Barking and Dagenham	11	12	1
Hackney	26	27	1
Lambeth	15	16	1
Redbridge	16	17	1
Total	213	301	88

45 Please note that the 2008 GTANA does not distinguish between local authority/housing association owned and/or managed pitches and privately owned pitches.

3.55 Table 3.18 shows the London boroughs that recorded a net loss of authorised pitches between 2008 and 2022. The most significant losses occurred in Lewisham (-16 pitches), Bromley (-10), Bexley (-6), and Southwark (-4).

3.56 Findings from GTANAs previously undertaken by RRR suggest several reasons that some London boroughs recorded a net loss of pitches between 2008 and 2022:

- Closure of sites, leading to a loss of pitches.
- Changes to site layouts, leading to an amalgamation of pitches.
- It can appear that there has been a reduction in provision when this is not actually the case. Different practices being adopted by local authorities may lead to differences in planning permissions – for example, planning permission may cite either the number of pitches and/or the number of caravans allowed on the site. Granting planning permission for a specific number of caravans can make it difficult to determine the number of pitches on a site. Pitches can be occupied by more than one caravan, so the number of pitches may be lower than the number of caravans.

Table 3.18 Loss of authorised Gypsy and Traveller pitches 2008-2022

Borough	**2008**	**2022**	**Difference**
Lewisham	16	0	-16
Bromley	66	56	-10
Bexley	32	26	-6
Southwark	42	38	-4
Waltham Forest	19	17	-2
Camden	5	4	-1
Richmond upon Thames	13	12	-1
Total	193	153	-40

3.57 In some instances, it is possible that sites allocated to Gypsies and Travellers may be occupied by non-Gypsy and Traveller households. Site visits undertaken to carry out household surveys confirmed the number of sites and pitches; and whether they were occupied by Gypsy and Traveller households.

3.58 Table 3.17 shows that only a small increase in Gypsy and Traveller pitch provision in London has occurred since the 2008 GTANA was undertaken. During the same period, there has been a substantial increase in the number of unauthorised developments recorded.

Travelling Showpeople plot provision

3.59 The number of Travelling Showpeople plots in London is much smaller than that of Gypsy and Traveller pitches. Table 3.19 shows initial estimates based on secondary data. Figures were subsequently confirmed by site visits to yards undertaken as part of the household surveys and further correspondence with boroughs. According to borough data, in June 2022 there were 98 Travelling Showpeople plots on 10 yards in London across five boroughs. Over two-fifths (44 per cent) of plots are in Hounslow, whilst just under a third (32 per cent) are in Bromley. Smaller proportions are situated in Hillingdon (12 per cent), Camden (7 per cent), and Havering (5 per cent).

Table 3.19 Number of Travelling Showpeople plots in London June 2022

Borough	Number	%
Hounslow	43	44%
Bromley	31	32%
Hillingdon	12	12%
Camden	7	7%
Havering	5	5%
Total	98	100%

3.60 It is useful to compare the number of households identified in the 2008 London GTANA to the number of plots in 2022, to determine changes in accommodation provision that occurred during that period. Table 3.20 shows this comparison. The 2008 GTANA referred to the number of Travelling Showpeople households, rather than plots. There was the equivalent of 161 plots in 2008 (assuming that each household occupied one plot), compared to 98 plots in 2022 – a reduction of 63 plots, equating to a 40 per cent decrease. Table 3.12 above shows that, between January 2016 and January 2024, the number of caravans occupied by Travelling Showpeople recorded in the Caravan Count increased.[46] However, Table 3.20 shows that there has been a considerable loss of plot provision between 2008 and 2022. This is due to a change in the use of yards and households moving to or needing to find suitable accommodation outside London.

3.61 It appears that, in 2008, there were plots for Travelling Showpeople in 14 London boroughs, compared to five in 2022. Much of the plot provision that has been lost was typically situated on relatively small yards: seven of the yards where plots were lost consisted of five or fewer plots. Boroughs in which a larger number of plots have been lost include Hounslow (80 plots were registered in 2008 compared to 43 plots in 2022; Ealing (11 in 2008, compared to zero in 2022); and Enfield (nine in 2008, compared to zero in 2022). The only boroughs where the number of plots increased between 2008 and 2022 were Bromley (16 plots in 2008, compared to 31 in 2022); and Camden (four in 2008, compared to seven in 2022).

3.62 To summarise, there are fewer Travelling Showpeople plots than Gypsy and Traveller pitches in London. Also, plot provision is concentrated in five London boroughs. Travelling Showpeople plot provision in London has decreased significantly since the 2008 GTANA was undertaken, with fewer boroughs providing plots.

[46] The number of caravans recorded decreased from 231 in January 2020 to 77 in January 2022.

Table 3.20 Change in Travelling Showpeople plots in London 2008-2022

Borough	2008 (households)	2022 (plots)	Difference
Barking and Dagenham	3	0	-3
Barnet	4	0	-4
Bromley	16	31	+15
Camden	4	7	+3
Ealing	11	0	-11
Enfield	9	0	-9
Greenwich	1	0	-1
Havering	5	5	0
Hillingdon	18	12	-6
Hounslow	80	43	-37
Southwark	2	0	-2
Tower Hamlets	3	0	-3
Waltham Forest	4	0	-4
Wandsworth	1	0	-1
Total	161	98	-63

4. Methodology

Summary

This chapter outlines and discusses the main methodologies adopted by the 2025 London GTANA. These include fieldwork surveys with GRTTS households living on Gypsy and Traveller sites and Travelling Showpeople yards; and online surveys designed to determine the accommodation needs of Gypsy and Traveller households living in bricks and mortar homes, and of members of the Roma community. An online survey with key stakeholders from a range of organisations was also undertaken, providing qualitative data regarding the accommodation needs of London’s GRTTS communities.

The chapter also describes the method used to determine whether new fieldwork (in the form of site fieldwork surveys of households living on sites and yards) should be conducted in a borough, given that some local authorities had recently undertaken GTANAs. It outlines the criteria devised and applied to GTANAs published since March 2019, to determine whether findings from those GTANAs could be incorporated into the 2025 London GTANA. It explains why new site fieldwork took place on sites and yards in three of the 11 boroughs that had recently published GTANAs (Southwark, Wandsworth, and Waltham Forest); and why Gypsy and Traveller, and Roma households living in bricks and mortar homes were surveyed in all London boroughs. The chapter outlines the method used to incorporate results from previously published GTANAs.

Household survey sample frameworks were determined using a range of the most robust, reliable data available. This includes data on sites and yards provided by boroughs, and 2011 and 2021 Census data. A minimum response rate of 80 per cent was set for surveys of Gypsies, Travellers and Travelling Showpeople living on pitches and plots. Given the larger populations, a minimum response rate of 10 to 20 per cent was set for Gypsies and Travellers, and members of the Roma community, living in bricks and mortar homes.

A methodology based on DCLG guidance (2007) was used to calculate the accommodation needs of GRTTS communities. This method involves comparing current accommodation provision with gross accommodation need. The chapter also explains how calculations of accommodation need take into account the cultural preference of Gypsy and Traveller households who currently live in bricks and mortar housing, need to move, and would prefer to live on a pitch.

Introduction

4.1 This chapter describes the research methods adopted for the 2025 GTANA, including fieldwork on sites and yards, and online surveys. It describes the method used to determine whether new fieldwork (in the form of surveys of households living on sites and yards) should take place in a borough, given that some local authorities had recently undertaken GTANAs. It outlines the methods used to determine sample frameworks for the GRTTS communities, based on the population estimates discussed in Chapter 3. It describes how the surveys were conducted and promoted. It also shows the methodology used to determine accommodation needs.

Research methods

4.2 A range of research methods were adopted for the 2025 GTANA, including site fieldwork and online surveys. The surveys were designed by RRR Consultancy, with Steering Group members commenting on drafts (please see the separate Technical Appendix for copies of the surveys). It should be noted that most survey responses were representative of all household members, and not just the particular household member who responded to the survey. The research methods included the following:

- Fieldwork surveys with GRTTS households living on Gypsy and Traveller sites in 20 boroughs, and with Travelling Showpeople in three of the five boroughs where there are yards. (Site fieldwork was not undertaken on yards in Havering, as the results of its existing GTANA were incorporated into the London GTANA – see paragraphs 4.10 to 4.22, below. Neither was site fieldwork undertaken on the yard in Camden as, although the yard was visited, there appeared to be no showperson present at the time. The data concerning supply and need has been provided by the council and incorporated into the assessment – see Chapter 6). These surveys covered a range of issues related to needs for accommodation and other services, including satisfaction with sites/yards and facilities; access to health and education facilities; travelling patterns and reasons for travelling; and current and future accommodation needs.
- An online survey of Gypsy and Traveller households living in bricks and mortar homes. As well as asking about reasons for households living in bricks and mortar homes, survey questions covered satisfaction with current accommodation; access to health and education facilities; travelling patterns and reasons for travelling; and current and future accommodation needs. This survey was undertaken in all boroughs.
- An online survey of Roma households. Given that the demographic characteristics of the Roma population differ from Gypsies and Travellers and on the recommendation of the Steering Group, this was designed differently to the survey of for Gypsies and Travellers living in bricks and mortar. It asked questions about awareness of housing rights; affordability of accommodation and services; and

accommodation needs and did not ask about patterns of travel. This survey was undertaken in all boroughs.

- As set out in Chapter 3 and this chapter, a review of secondary information. This includes a review of national planning policies and guidance; analysis of GTANAs previously undertaken by London boroughs and data provided by London boroughs; analysis of data derived from the 2008 London GTANA; and analysis of secondary data, including Traveller Caravan Count, and 2011 and 2021 Census data.
- Consultation with a range of stakeholders, using an online survey to provide in-depth qualitative information about the accommodation needs of London's GRTTS communities. The consultation aimed to obtain an understanding of issues specific or relevant to London from local authorities and organisations that represent and/or provide services to GRTTS communities. Local authorities consulted included planning authorities neighbouring London. Qualitative data derived from the stakeholder consultation complements the largely quantitative data derived from undertaking household surveys by providing context to the findings. For example, it helps to explain why overcrowding may take place on pitches and plots. (See Appendix 16.)

4.3 The research methods described above ensured a wide range of quantitative and qualitative data was gathered. RRR initially proposed the methods in response to the specification used by the GLA in its tender process. They were finalised after discussion with the GLA and GTANA Steering Group.

Promoting and conducting surveys

4.4 Fieldwork on sites and yards, and online surveys of GRTTS households, were key parts of the GTANA research process. Work was undertaken to promote the surveys to GRTTS communities, and to encourage responses to both the online and site surveys. This work was mainly done by GRTTS community groups, although borough officers and other stakeholders played an important role in cascading information about and promoting the GTANA surveys. Stakeholders also helped the survey interviewers access households living on sites and yards, rough sleeping, and living on roadsides.

4.5 The GLA's specification for the GTANA (January 2022) requested that the consultants recruit and train community interviewers. This was because community interviewers were more likely to gain the trust of GRTTS households than non-community interviewers, meaning they could secure higher survey response rates.

4.6 Of the 14 interviewers RRR recruited, 10 identified as members of GRTTS communities and four did not.

4.7 GRTTS representative organisations were active in promoting the assessment and encouraging communities to complete the surveys. The project included funding for some promotional work to maximise household survey response rates. This work included producing and sharing leaflets, and a video, that explained the GTANA's objectives, and encouraged households to complete surveys. Organisations also promoted the GTANA surveys with communities, using social media, and in person at the 2022 Traveller Movement Annual Conference.

4.8 As part of the project, GRTTS representative organisations were paid to undertake specific work to encourage Gypsies and Travellers living in bricks and mortar homes, as well as Roma households, to complete the online surveys. This included helping households (including those with whom they had contact through their regular support work) with digital access (for example, supplying laptops and tablets) and supporting them to complete the online surveys. Organisations also monitored the number of surveys completed in different boroughs, focussing on promoting the surveys in boroughs where response rates were lower. GRTTS community groups undertook four 'drop-in' sessions, whereby Gypsies and Travellers and members of the Roma community, were encouraged and assisted to complete the online survey, at places such as local community centres, churches, and libraries.

4.9 RRR commissioned RSG and ROTA to promote the Roma online survey and translate it into the main languages used by the Roma community in London (Bulgarian, Polish, Romanian and Slovakian).

Boroughs included in site fieldwork

4.10 The GLA's project specification required the supplier to establish whether, in some cases, data from GTANAs recently undertaken in boroughs could be used in the London GTANA, rather than undertaking new fieldwork in those areas. This was partly about targeting resources; but it was also about avoiding surveying GRTTS populations that had recently been surveyed, where possible, to avoid several risks. Further surveying might have been considered intrusive or might have led to increased scepticism about the value of GTANAs. It could also lead to low response rates to the household survey, to the detriment of robust results.

4.11 Several factors were used to determine in which boroughs with local GTANAs (listed in Table 4.1) new site fieldwork should take place. (Appendix 8 summarises the results of analysis of GTANAs published since March 2019.) These factors are as follows:

- **recency:** when the GTANA was completed, and the period covered by findings
- **definition(s) of Gypsies and Travellers used** – specifically, whether these included the definitions set out in PPTS (2015) and the draft London Plan (2018)

- **groups whose needs were assessed** – specifically whether the GTANA assessed the accommodation needs of English/Romany Gypsies; Irish Travellers; Travelling Showpeople; New Travellers; and Eastern European Roma
- **types of accommodation considered:** Whether the assessment quantified accommodation needs in terms of:
  - private sites/yards
  - socially rented residential sites/yards
  - residential pitches/plots
  - transit pitches/plots
  - housing/bricks and mortar dwellings – owner occupation and affordable
- **robustness of findings:** i.e., whether site surveys were undertaken with Gypsy and Traveller households and response rates to these.

4.12 After examining these factors, it was determined that site fieldwork would not take place in Bexley, Haringey, Havering, Merton, Newham or Richmond. Instead, the Steering Group agreed that data from their recently completed GTANAs should be incorporated into the London GTANA. However, the Steering Group advised that accommodation need arising from Gypsy and Traveller households living in bricks and mortar homes, and Roma households, for all boroughs (including these six) should be determined by surveys conducted for the London GTANA – given that previous borough GTANAs had not fully assessed the accommodation needs of these cohorts. The methodology used to determine accommodation needs in the six boroughs where site fieldwork did not take place is described in paragraphs 4.61 to 4.73, 'Incorporating data from local GTANAs'.

4.13 There was no need to consider whether to undertake fieldwork in Islington, Enfield, City of London, Barnet, Lewisham or Westminster. This is because these boroughs contain no Gypsy and Traveller sites. It was agreed that site fieldwork should take place in the other boroughs. The sections below set out further detail on the considerations applied.

Recency

4.14 RRR recommended that new fieldwork should be undertaken on sites and yards in all boroughs that contain them, where a GTANA had not been completed since March 2019 for the following reasons:

- PPTS requires local authorities to identify and update, annually, a supply of specific deliverable sites, sufficient to provide five years' worth of sites against locally set targets.[47] As such, it is good practice for local authorities to update evidence regarding the accommodation needs of the travelling communities every

[47] Although PPTS 2015 and PPTS 2023 are superseded by PPTS 2024, these requirements of local authorities remain.

five years. The data from GTANAs published over five years ago would not be sufficiently up to date.

- According to guidance on GTANAs published by the (then) DCLG in 2007, a key factor determining accommodation need is whether households plan to move to another location in the next one to five years.[48] (Although the guidance was revoked in July 2016, it remains useful and relevant in helping to determine whether the findings from previous GTANAs should be incorporated into the 2025 GTANA.)

4.15 The GTANA Steering Group agreed that new fieldwork should be undertaken in all boroughs that had not published a GTANA since March 2019. Table 4.1 shows boroughs that have carried out a GTANA since March 2019.

Table 4.1: London GTANAs undertaken since March 2019

Number	Borough(s)	Completed	Consultancy	Adheres to draft London Plan (2018) definition?
1	Havering	March 2019	ORS	No
2	Wandsworth	April 2019	Internal	Yes
3	Bexley	April 2019	Arc4	Yes
4	Merton	July 2019	RRR	Yes
5	Islington	July 2019	RRR	Yes
6	Waltham Forest	March 2020	ORS	Yes
7	Southwark	May 2020	ORS	Yes
8	Barking and Dagenham	September 2020	ORS	Yes
9	Enfield	October 2020	Arc4	Yes
10	City of London	March 2021	Internal	N/A
11	Bexley	October 2021	Arc4	Yes
12	Haringey	February 2022	ORS	No
13	Newham	June 2022	ORS	No
14	Richmond	February 2022	Internal	Yes
15	Wandsworth update	April 2022	Internal	No
16	Hammersmith and Fulham, and Kensington and Chelsea	October 2022	Internal	No

Definition(s) of Gypsies and Travellers used

4.16 The second criterion for using the findings from GTANAs conducted since 2019 was that they use the PPTS and 2018 draft London Plan definitions of Gypsy and Traveller (see paragraphs 1.5, 2.6 and Appendix 17). Five GTANAs undertaken since March 2019 do not use the draft London Plan (2018) definition, as shown in Table 4.1, above. Of these, Wandsworth, Kensington and Chelsea, and Hammersmith and Fulham had GTANAs in production; these were therefore unavailable for analysis

[48] DCLG, Gypsy and Traveller Accommodation Needs Assessments, October 2007. This guidance was withdrawn in December 2016.

while fieldwork was being considered. For the other two GTANAs (Havering (2019) and Haringey (2022)), it was possible to determine the accommodation needs of households who meet the draft London Plan (2018) definition by adding together the needs figures for ‘meets the definition’ and ‘does not meet the definition’. As such, the Steering Group decided that new fieldwork would not take place in these two boroughs.

Groups and types of accommodation considered

4.17 The third criterion for using findings from GTANAs conducted since 2019 was whether they assess the needs of all groups to be covered by the 2025 GTANA. Not all GTANAs consider accommodation needs arising from households living in bricks and mortar – for example, Barking and Dagenham (2020), Southwark (2020), Waltham Forest (2020) and Wandsworth (2022) do not. When they do address it, the approach may rely solely on secondary data or use a survey sample that is too small to draw reliable conclusions (see paragraphs below on robustness). Also, none of the GTANAs explicitly determine the accommodation needs of the Roma community separately from those who live on sites or yards. As such, the 2025 GTANA provided an opportunity to improve household survey response rates in relation to the differing GRTTS communities.

Robustness of findings

4.18 It is preferable that the assessment of needs for GRTTS accommodation is based on primary rather than secondary data. This is because primary data provides direct, up-to-date, and specific insights into the current circumstances and preferences of the communities involved. Primary data collection, such as surveys and interviews, allows for a more accurate understanding of the unique needs, challenges and aspirations of GRTTS households. This ensures that the assessment reflects the realities of those being studied.

4.19 As such, a further consideration was whether the findings of existing GTANAs are robust, insofar as they are based on robust response rates to fieldwork. To assess this, it was important to determine the site survey response rates. There is no current guidance regarding minimum household survey response rates. However, the Steering Group and the GLA decided that a minimum response rate of 60 per cent would lead to confidence in the reliability and robustness of the survey results.

4.20 For most GTANAs, household survey response rates were above the 60 per cent threshold for households on sites. However, Waltham Forest (2020) achieved a response rate of 29 per cent; and Wandsworth’s GTANA was based on secondary data. This meant new fieldwork was needed in both boroughs.

4.21 Due to a relatively low survey response rate (61 per cent) from households living on pitches, Southwark council indicated that it would like fieldwork to be conducted in its borough as part of the London GTANA, despite the borough having completed a GTANA in 2020. They were aware of the benefits of new fieldwork taking place in the borough, and did not believe it would lead to 'survey fatigue'.

Further considerations

4.22 GTANAs numbered 12 to 15 in Table 4.1 were not available during the initial analysis. Site fieldwork was not planned in Newham, as a GTANA was already in progress in the borough. Although Newham GTANA's accommodation needs figures do not adhere to the draft London Plan 2018 definition, they could be used to determine the cultural and PPTS needs figures.

4.23 Initially, RRR planned to conduct fieldwork on sites in Richmond. However, while the fieldwork was under way, the borough published its own GTANA. Upon assessment, RRR determined that data from Richmond GTANA met the criteria to be incorporated into the London GTANA. Wandsworth published an update, whilst Hammersmith and Fulham, and Kensington and Chelsea, produced their own GTANAs while the London GTANA fieldwork was under way. RRR undertook fieldwork on sites in Wandsworth, Hammersmith and Fulham, and Kensington and Chelsea, as their GTANAs were not available for analysis during the period when fieldwork for the 2025 London GTANA was being carried out.

Determining sample sizes

4.24 The London GTANA sample sizes were determined using secondary data discussed in Chapter 3. Sample sizes were determined using a combination of Census population data; data on pitch numbers provided by London local authorities; and data from the 2008 GTANA (for estimating the number of Roma households). Because 2021 Census data regarding the number of GRTTS households was not published until March 2023 (i.e., after sample sizes had been determined), 2011 Census data regarding the number of Gypsy or Irish Traveller households living in London was used to determine sample sizes, whilst 2021 Census data was used to determine accommodation needs.

Gypsies, Travellers and Travelling Showpeople living on sites and yards

4.25 As discussed in Chapter 3, the fieldwork sample size for Gypsies, Travellers and Travelling Showpeople households living on sites and yards was determined by analysing data on sites and/or yards requested from London boroughs.

4.26 Table 4.2 shows that, based on local authority data, there were an estimated 743 Gypsy and Traveller pitches and 98 Travelling Showpeople plots in London in June

2022. It is important to note that these figures were to be confirmed by site and yard visits. Following visits, sample sizes sometimes changed from the number of pitches and plots in each borough as set out in Chapter 3 during the fieldwork period.

4.27 As explained above, new fieldwork on pitches and plots did not take place in all boroughs where GTANAs had recently been undertaken. Excluding the six local authorities with sites where this work was not taking place, left a total of 530 pitches and 93 plots where site fieldwork would occur. In addition to the number of pitches and plots, their locations, and whether or not they were occupied, were also confirmed during fieldwork.

Table 4.2: Pitch/plot sample size June 2022 from London borough data 2022

Type	**Pitches/plots**	**Less pitches/plots in six boroughs with recent GTANAs**	**Total**
Local authority/housing association pitches	504	78	426
Privately owned or rented pitches	94	28	66
Pitches with temporary planning permission	3	0	3
Unauthorised pitches	142	107	35
Subtotal	*743*	*213*	*530*
Travelling Showpeople plots	98	5	93
Total	841	218	623

4.28 The aim was to achieve 100 per cent survey response rate – i.e., 623 household interviews – with a minimum response rate of 80 per cent – i.e., 498 household interviews (please note that site visits and information provided by boroughs resulted in the actual sample size, as presented in Chapter 5 (paragraph 5.7 and Table 5.6) and Chapter 6 (paragraph 6.7 and Table 6.3), differing from these original figures in Table 4.2 above). This target response rate was agreed at the beginning of the fieldwork, based on the data outlined in Chapter 3. It was also agreed between RRR and the GLA that interviewers would visit each pitch and plot up to three times, to maximise the likelihood of the occupants completing the household survey.

Gypsies and Travellers living in bricks and mortar homes

4.29 As outlined in Chapter 3, the 2011 Census recorded 2,874 Gypsy or Irish Traveller households living in London. However, the data included households living both on sites and in bricks and mortar homes. To estimate the number of households living in bricks and mortar homes, it was necessary to deduct the number of pitches using borough data (assuming one household per pitch) from the total number of households. As Table 4.3 shows, this calculation suggested that 2,046 Gypsy and Traveller households live in bricks and mortar homes in London.

4.30 Given the large number of Gypsy and Traveller households living in bricks and mortar homes, compared to those living on sites in London, it was not feasible to aim for a 100 per cent response rate to the survey for this population. Reliable results are also more likely where survey-results data is extrapolated to larger populations, than to smaller populations. The GLA, RRR and the Steering Group therefore agreed that, whilst RRR would aim for a 20 per cent response rate across London, a response rate of between 10 per cent (equating to 204 survey responses) and 20 per cent (408 responses) was acceptable. The GLA, RRR and the Steering Group agreed that the target response rate should be 20 per cent in each borough (as well as across London). This target was achieved in over two-thirds of London boroughs.

Table 4.3: Gypsy and Traveller households living in bricks and mortar homes

Households (2011)	**2,874**
Less living on pitches (2022 – updated)	828
Total	2,046
10% sample	204
20% sample	408

4.31 Although 2011 Census data was used to determine the sample size for the surveys, 2021 Census data is used to determine the number of Gypsy and Traveller households living in bricks and mortar accommodation for the purposes of calculating accommodation needs.

The Roma community

4.32 As discussed in Chapter 3, the size of the Roma community is more difficult to determine than that of Gypsy, Traveller and Travelling Showpeople communities. The 2011 Census did not include 'Roma' as an ethnic category. As a result, the sample size for the Roma community was determined using a combination of 2021 Census data on the total Roma population, with data indicating average household sizes derived from the 2008 GTANA. The 2021 Census recorded 37,690 members of the Roma community living in London. The 2008 GTANA found that the average size of Roma households was 5.2 persons. This suggested that, in 2021, approximately 7,248 Roma households (37,690 divided by 5.2) lived in London. RRR agreed with the GLA and the Steering Group a sample size range of between 10 per cent and 20 per cent in each borough and across London. For London as a whole, a 10 per cent sample equates to 725 interviews; and a 20 per cent sample equates to 1,450 interviews (Table 4.4).

Table 4.4: Roma households – sample size using 2021 Census population data and 2008 London GTANA household size data

Roma (persons)	**37,690**
Households	7,248
10% sample	725
20% sample	1,450

4.33 However, 2021 Census data published in March 2023 (i.e., after the sample size had been determined) indicated that 14,480 Roma households, with an average household size of 2.58 persons, live in London. This means that a 10 per cent sample equates to 1,448 survey responses, whilst a 20 per cent sample equates to 2,896 responses (Table 4.5).

Table 4.5: Roma households – sample size using 2021 Census household data

Households	**14,480**
10% sample	1,448
20% sample	2,896

4.34 Given that 2021 Census data indicating the higher number of Roma households in London was not published until March 2023 – i.e., towards the end of the fieldwork period – sample sizes were based on the results of the calculations reflected in Table 4.4 as it was not practical to revise sample sizes in light of the new data. This was not considered too problematic because the overall number of responses was considered the most important aspect and the increase in the number of households from the 2008 GTANA (Table 4.4) to the 2021 Census (Table 4.5) was relatively consistent across all boroughs, with no single borough experiencing a substantially higher increase than others.

Calculating accommodation needs

4.35 This GTANA calculates accommodation needs over two five-year periods: 2022-23 to 2026-27; and 2027-28 to 2031-32. It does so based on a model suggested in DCLG (2007) guidance.

4.36 The basic premise of the model in DCLG guidance is that, by comparing current accommodation provision with gross accommodation need, it is possible to calculate net accommodation need. This calculation is carried out through a series of steps. The number of steps involved in calculating accommodation need varies according to the GRTTS community. There are 16 steps involved in calculating the accommodation needs of Gypsy and Traveller households living on pitches (see Chapter 5), 14 steps involved in calculating the accommodation needs of Travelling Showpeople households living on plots (see Chapter 6), 11 steps involved in calculating the accommodation needs of Gypsies and Traveller households living in bricks and mortar homes (see Chapter 7), and seven steps involved in calculating the accommodation needs of the Roma community (see Chapter 8). The number of steps used to calculate accommodation needs differs because some factors are relevant to some cohorts and not others. For example, cultural preference is considered when calculating the accommodation needs of Gypsy and Traveller households living in bricks and mortar accommodation; but not when assessing the accommodation needs of other cohorts.

Determining households that meet the PPTS 2024 definition

4.37 All Gypsy and Traveller households whose accommodation needs are assessed in this GTANA are considered to meet the PPTS definition. This is because they fall into the category of "persons with a cultural tradition of nomadism or of living in a caravan", which forms part of the PPTS definition. Please refer to Appendix 17 for further detail.

Determining the number of Gypsy and Traveller households in bricks and mortar accommodation

4.38 Determining the number of Gypsies and Travellers in bricks and mortar accommodation, using the 2021 Census data, involves several steps. Initially, the number of Gypsy and Traveller households in each borough is derived from the 2021 Census, with the total number adjusted by removing those known to reside on pitches as determined by borough data combined with site visits. This provides an estimate of those living in bricks and mortar accommodation. In boroughs where this results in a figure lower than the number of households living in flats or maisonettes, according to the 2021 Census, the number is adjusted so that it is not less than this figure. In two boroughs, subtracting households living on pitches from the total number of households gives a negative figure. For these boroughs, the number of households in bricks and mortar accommodation is estimated by subtracting the number of Gypsy and Traveller households the Census records live in caravans or mobile homes, from the total number of Gypsy and Traveller households in these boroughs.

Determining accommodation need and supply

4.39 As well as taking into account existing supply, the accommodation needs calculations also consider changes to supply. The number of pitches that the GTANA calculates will be available at the end of the first five-year period (2022-23 to 2026-27) and uses in calculating need during the second five-year period (2027-28 to 2031-32), includes pitches that may be developed in the first five-year period. The calculations assume that any need for additional pitches arising during the first five-year period will be met by the start of the second five-year period. Any accommodation need not met during the first five-year period will need to be carried forward to the second five-year period. This ensures that the GTANA's accommodation needs figures remain accurate, providing a framework for future planning and development that reflects need.

4.40 It is important to note that this assessment determines households' need for accommodation, rather than demand or preference. For example, a Gypsy or Traveller aged 16 or over (at the time of the survey), whose household indicates that they will require a separate pitch or home within the next five years, is considered in need. In contrast, the GTANA does not attribute need to a household living in bricks and mortar, and wanting to move to an area closer to facilities; nor to a parent stating that a young person requires a separate home, if they are not expected to reach the age of 16 or over during the first five-year period for which need is calculated.

4.41 Households treated as in need also include those living in overcrowded accommodation; or households 'hidden' or 'doubled up' on pitches or yards.

4.42 To ensure a rigorous definition of overcrowding, accommodation need deriving from overcrowding in bricks and mortar is determined by comparing the number, sex, age and relationship of household members with the 'bedroom standard' (see Appendix 11). Accommodation need arising from overcrowding on pitches and plots is determined in two ways: first, if there were not enough bedroom spaces to accommodate all household members; and second, if more caravans are situated on a pitch than it is designed to accommodate. 'Doubled-up' households – i.e., multiple households sharing a single pitch designed for one household – were determined to be overcrowded using the results of household surveys.

4.43 It is important to note that, like a Strategic Housing Market Assessment (SHMA), this assessment does not and cannot account for historic need when households in need have left the study area to find suitable housing elsewhere. This limitation is inherent in the methodology and scope of such assessments, which focus on current and future needs within the study area.

Calculating needs for two five-year periods

4.44 Accommodation needs for the first five-year period – 2022-23 to 2026-27 – are calculated using survey responses. The surveys determine the proportion of households who need to move for various reasons, such as overcrowding or to accommodate newly forming households. The way in which the survey responses are used to determine accommodation needs differs according to the GRTTS cohort.

4.45 As with all methodologies for calculating accommodation need, certain assumptions and simplifications are employed. For instance, the GTANA needs calculations consider the number of bricks and mortar homes made available due to mortality and household movements. However, it cannot be assumed that the resulting vacant properties will be made available to GRTTS households. The allocation of these properties can be influenced by various factors, such as housing policies, the availability of suitable sites, and local authority decisions.

4.46 The accommodation needs of Gypsy and Traveller households living on sites are determined for each borough using survey responses from within that borough, whereas the accommodation needs of Gypsy and Traveller, and Roma households living in bricks and mortar homes are based on survey responses received across

London and then extrapolated to the whole population – i.e., all households.[49] For instance, analysis of survey responses determined that 19 per cent of Roma households surveyed experience overcrowding. From that, it is extrapolated that 19 per cent of Roma households living in London experience overcrowding. Similarly, it was determined that 19 per cent of Gypsy and Traveller households living in bricks and mortar homes display a cultural preference for living on a pitch.

4.47 Accommodation needs for the second five-year period (2027-28 to 203-32) are based on applying a population growth rate derived from analysis of factors identified by the household surveys conducted for the 2025 GTANA. These factors include current population numbers; the average number of children per household; and household formation rates. The factors are used to estimate population growth over a 20-year period. Although the accommodation needs calculations cover a 10-year period, using twice this to establish household formation rates provides a more accurate projection, accounting for longer-term trends and smoothing out annual fluctuations. The difference between the current and projected populations determines a five-year population growth rate.

4.48 The gross annual population growth rate for each GRTTS cohort is determined in the same way, based on household survey responses. However, for specific populations some adjustments are made to the mortality rate that forms part of the annual population growth rate (similar to conventional Housing Needs Assessments). For GRTTS communities (including those living on sites, and in bricks and mortar accommodation), the mortality rate has been adjusted to reflect studies indicating that their life expectancy is approximately 10 years shorter than that of the general population.[50]

4.49 Net London-wide population growth rates (i.e., the gross annual population growth rate, less the mortality rate for each of the four cohorts (Gypsies and Travellers living on sites; Travelling Showpeople living on plots; and Gypsy and Traveller, and Roma households living in bricks and mortar homes)) are applied to the respective GRTTS population for each borough individually. This results in borough-specific needs figures for each cohort for the second five-year period.

4.50 For example, analysis of survey responses from Gypsy and Traveller households who live on sites indicates a growth rate over a 20-year period that equates to an annual household growth rate of three per cent per annum (compound). This, in turn, equates to a five-year rate of 15.9 per cent. A mortality rate of 2.8 per cent over each five-year period is applied. Combining these two figures yields a net population

[49] The Roma population figure used in these calculations is based on 2021 Census data, rather than on the combination of 2021 Census data and data on the average household size derived from the 2008 GTANA, used to determine the London GTANA survey sample size.

[50] For example, Montgomery Dunn, Eleanor J C Turner-Moss, Beverley Carpenter, Ewen Speed, Kathryn Charlotte Dixon and Tanya Blumenfield in BMJ Global Health, The effects of literacy on health in Gypsies, Roma and Travellers (GRT): a systematic review and narrative synthesis', November 2024

growth rate of 13.1 per cent. This London-wide population growth rate is then applied to the number of Gypsy and Traveller households estimated to reside on pitches at the start of the second five-year period.

4.51 There are several reasons for determining need in the second five-year period by applying a London-wide population growth rate. First, some boroughs contain a relatively small Gypsy and Traveller population, making it difficult to predict population growth. Second, site fieldwork did not take place in all boroughs. Therefore for some boroughs, there was no recent data to determine population growth on a local basis. Third, response rates to surveys of Gypsy and Traveller, and Roma households living in bricks and mortar homes conducted for the GTANA are low in some boroughs. Using a London-wide approach to calculating future accommodation needs ensures greater consistency in terms of the methodology and comparability across boroughs.

Cultural preference to live on a pitch

4.52 When assessing the needs of Gypsies and Travellers living in bricks and mortar homes, GTANAs need to adopt a basis for establishing which households need to live on pitches. Households were identified as having a cultural preference for living on a pitch if they gave the responses specified below to all of the following questions:

- Question A6: Why do you live in a house/flat rather than a caravan? (Response categories: ‘due to a lack of sites’, ‘no choice’ or both – 411 respondents, or 82 per cent.) This question is important as it determines the proportion of households who prefer to reside on a site but are unable to do so.
- Question E6. ‘Do you need to move to a different home within the next five years?’ (Response category: ‘yes’ – 160 respondents, or 32 per cent.) This question is central to determining households’ need to move within the first five-year period covered by the GTANA.
- Question E8: What type of accommodation would you most prefer to move to? (Response categories: Council/social rented site’, ‘Private site owned by self’, or ‘Private rented site’ – 118 respondents, or 24 per cent.) Responses to this question are central to determining the proportion of households who would prefer to live on a site.

4.53 The combination of responses to questions A6, E6 and E8 (i.e., households that live in a house or flat due to a lack of sites or no choice; need to move into a different home in the next five years; and would prefer to live on a site) leads to a determination that 19 per cent of Gypsy and Traveller households who live in bricks and mortar homes need to move, and have a cultural preference for living on a pitch on a site. This leads to a need for 381 additional Gypsy and Traveller pitches (see Step 15 Chapter 5, and Step 3 of Table 7.46).

4.54 Analysis of household survey responses suggests that, of the 97 households that display a cultural preference to reside on a pitch on a site, all meet the definition of Gypsy and Traveller.

Determining the need for transit pitches

4.55 One objective of the London GTANA is to quantify the need for transit sites and pitches (see paragraph 1.5). The primary approach for this is through an analysis of secondary data. Accordingly, data on the historical number and locations of unauthorised encampments was requested from London boroughs. However, there was insufficient evidence from boroughs. This means it is not possible for the GTANA to use borough data to determine the number and location of transit pitches needed.

4.56 The MHCLG Traveller Count is an alternative data source for assessing the need for transit sites and pitches. As Chapter 3 explains (see paragraphs 3.3 to 3.10), there are several limitations to the reliability of this data. For example: counting practices vary between local authorities, and since the Count is conducted on a single day (albeit twice a year), it only reflects caravans present on the day of the Count, and does not capture the fluctuating nature of unauthorised encampments.

4.57 Also, while the Traveller Count records the number of caravans on unauthorised pitches, it does not distinguish between those on unauthorised encampments and those on unauthorised developments. The distinction between unauthorised encampments and developments is important. As stated in the Glossary (see p. 210), unauthorised encampments include households temporarily occupying land they do not own without the owner's consent. Households on unauthorised encampments typically require transit accommodation provision.

4.58 Unauthorised developments refer to construction or land use undertaken without obtaining the necessary planning permission or legal authorisation from the LPA. This can include building structures, altering land or using the land in ways not complying with existing planning laws or permissions. For example, in the context of Gypsy and Traveller sites, an unauthorised development may occur if a site is set up but lacks the required planning permission. A local authority may 'tolerate' an unauthorised development, meaning no enforcement action is currently being taken, or likely to be taken. In contrast, a local authority may actively work to remove a 'not tolerated' unauthorised development. Households on unauthorised developments typically require permanent accommodation provision.

4.59 Despite its limitations, the MHCLG Traveller Count provides the most robust basis for assessing transit needs, by offering consistent, long-term data on caravan occupancy across England. This twice-yearly count helps identify trends and gaps in provision, thus supporting strategic planning for transit sites. While it may miss daily fluctuations, and vary by local data collection practices, its national scope and regularity make it valuable for informing resource allocation and identifying areas of unmet need.

4.60 The methodology used to determine the need for transit provision involves analysing data from the MHCLG Traveller Count between January 2016 and January 2024. The process begins with identifying the number of caravans recorded on unauthorised pitches in each London borough. This was done via site visits carried out as part of the GTANA fieldwork. This figure is subtracted from the number of caravans on unauthorised pitches recorded by the Caravan Count, arriving at the total calculated number of caravans on unauthorised encampments. The average is then calculated, resulting in an estimated transit need.

Incorporating data from local GTANAs

4.61 As outlined in paragraphs 4.10 to 4.23, above, there are six boroughs for which data from previously published GTANAs (rather than site fieldwork) is used to determine accommodation needs for Gypsy and Traveller pitches and Travelling Showpeople plots.

4.62 The method used to incorporate accommodation needs from previously published GTANAs consists of two parts:

- Part A: Calculating and incorporating accommodation needs for pitches and plots from borough GTANAs. These are directly taken from the needs identified in these GTANAs and, where applicable, incorporated into the authorities' respective Local Plans.
- Part B: Calculating accommodation need for pitches from households living in bricks and mortar. This is based on online surveys carried out as part of the 2025 London GTANA, to identify the need for pitches deriving from those who live in bricks and mortar.

4.63 The steps involved in each part are set out below.

Part A: Calculating and incorporating accommodation needs for pitches and plots using local GTANAs for 2022-23 to 2031-32:

Determining accommodation needs for 2022-23 to 2026-27

4.64 Step 1: Identify the need for additional pitches and plots in previously published borough GTANAs and, where applicable, Local Plans.

4.65 Step 2: Review figures identified through Step 1 to enable findings from borough GTANAs to correspond with the London GTANA needs periods – i.e., 2022-23 to 2026-27. It is assumed that accommodation needs identified by previously published

GTANAs arising before the first five-year London GTANA period – i.e., 2022-23 to 2026-27 – have not been met, unless there is evidence that they have been (for example, through evidence that planning permission for new pitches/plots and/or allocating pitches/plots has been, or is expected to be, granted within the first five-year period of the London GTANA). Accommodation needs arising from periods longer than the first London GTANA accommodation needs period – i.e., 2022-23 to 2026-27 – are 'annualised' to ensure they match the London GTANA needs periods. For example, if a GTANA covers 2022-23 to 2028-29 (seven years), the figure can be adjusted to cover five years, by dividing it by seven and then multiplying the result by five.

4.66 Step 3: Determine the accommodation needs of households who meet the definition of Gypsy and Travellers.

Determining accommodation needs for 2027-28 to 2031-32

4.67 Step 4: Calculate accommodation needs for pitches using borough GTANAs for 2027-28 to 2031-32. This is determined in the same manner as need for 2022-23 to 2026-27, as outlined above in Steps 1 to 3. As for all other boroughs, the calculations assume that accommodation need arising during the first five-year period has been met. (See paragraph 4.39.)

Part B: Calculating accommodation need for pitches from households living in bricks and mortar:

Determining accommodation needs for 2022-23 to 2026-27

4.68 Step 1: Based on household surveys conducted for the 2025 London GTANA, this assessment determines the need for pitches by establishing which respondent households living in bricks and mortar have a cultural preference for living on a pitch; and need to move in the next five years. As indicated at paragraph 4.46, and explained at paragraphs 4.52 to 4.54, survey responses suggest that this is the case for 19 per cent of respondent households who meet the definition of Gypsies and Travellers. This percentage is applied to the estimated number of Gypsy and Traveller households living in bricks and mortar in each borough, to determine the need for pitches for this cohort.

4.69 Step 2: Determine the number of Gypsy and Traveller households living in bricks and mortar accommodation in each borough. This involves deducting the number of households that, according to borough GTANAs, live on pitches from the number of households that the 2021 Census records as living in the borough (with the exception of Havering where the 2021 Census figure is used, minus households the Census records live in a caravan or other mobile or temporary structure).

4.70 Step 3: Determine the number of households that need to move and have a cultural preference to live on a site – i.e., 19 per cent.

4.71 Step 4: To avoid double-counting, the accommodation need for pitches arising from Gypsy and Traveller households living in bricks and mortar accommodation, as determined by the six boroughs’ GTANAs, is deducted from the number of households that need to move and have a cultural preference to live on a site, as identified in Step 3.

Determining accommodation needs for 2027-28 to 2031-32

4.72 Step 5: Finally, the population growth rate described at paragraphs 4.47 to 4.51 is applied to the number of households identified at Step 4 to determine accommodation need during the second five-year period of need – i.e., 2027-28 to 2031-32. This relates only to need deriving from bricks and mortar, as need deriving from sites is already included in Part A (above).

Summary of accommodation needs based on GTANA calculations (2022-23 to 2031-32)

4.73 Accommodation needs resulting from these calculations, including need arising from previously undertaken GTANAs, are shown in Table 5.37, ‘Summary of accommodation needs 2022-23 to 2031-32 (pitches)’, and Table 7.47, ‘Accommodation needs of Gypsies and Travellers living in bricks and mortar homes and households on sites seeking bricks and mortar homes’.

5. Gypsies and Travellers living on sites

Summary

This chapter outlines and discusses the main findings from surveys undertaken with Gypsy and Traveller households living on Gypsy and Traveller sites and unauthorised encampments.

RRR, the GLA and the Steering Group agreed that a survey response rate of over 80 per cent from this cohort would be acceptable. A total response rate of 96 per cent was achieved across the boroughs where site surveys took place.

The chapter provides quantitative and qualitative data regarding key characteristics of households residing on Gypsy and Traveller sites and unauthorised encampments. The survey responses provide insights into households' current accommodation, travelling patterns, health, education, employment, and experiences of accessing services.

A large proportion of Gypsy and Traveller households on sites live in the social rented sector, and emphasise the importance of residing close to family or friends. Despite the proximity to their social networks, nearly two-fifths of households reported being dissatisfied or very dissatisfied with their current accommodation. This is a significantly higher dissatisfaction rate than that of the general population in England.

Many Gypsy and Traveller households view owning their private site as ideal; yet they recognise this is often unattainable due to the high costs and limited availability of land in London. Consequently, social rented sites play a crucial role in providing housing options.

Households on sites reported that they frequently encounter discrimination when accessing services and during travel. Health issues are also prevalent, with mental health being the most commonly cited issue.

Households living on unauthorised encampments often cite a lack of available pitches, and a strong desire to maintain their traditional way of life, as primary reasons for their travelling lifestyle. In terms of travel patterns, just over half of the households reported that they or a family member had travelled within the past 24 months. However, the COVID-19 pandemic and the cost-of-living crisis were significant factors preventing some households from travelling during this period.

This chapter assesses and calculates accommodation need for additional pitches across all London boroughs. This calculation uses survey responses, and is based on an understanding of the occupancy of pitches that was confirmed through site visits. The accommodation needs calculation also uses data from online surveys with Gypsy and Traveller households residing in bricks and mortar accommodation (see Chapter 7), where

these households need pitches; and findings from previously published GTANAs for six boroughs where site surveys were not undertaken as part of this GTANA (see Chapter 4).

Accommodation need results from various factors, such as overcrowding on households' current pitches and new household formation. This assessment identifies an additional accommodation need for 843 pitches across London for the 10-year GTANA period, based on households that meet the definition of Gypsies and Travellers.

Introduction

5.1 This chapter summarises the findings from the survey of Gypsy and Traveller households living on sites (completed in 2023). It also determines the current and future need for pitches on sites. To do so, it draws on the survey of Gypsy and Traveller households living on sites and online survey of Gypsy and Traveller households living in bricks and mortar accommodation. This includes households living on authorised sites – i.e., sites with planning permission – and those residing on unauthorised developments or encampments.[51] The accommodation needs of Travelling Showpeople living on plots are discussed in Chapter 6.

5.2 All Gypsy and Traveller households whose needs are determined in this GTANA are considered to meet the PPTS 2024 definition of Gypsy and Traveller (see paragraphs 2.9 and 4.37).

5.3 The chapter also discusses key findings derived from surveys of Gypsy and Traveller households and site visits. This includes matters relating to local authority and housing association sites raised by households and identified during site visits, including the condition and standard of sites, maintenance issues and repairs needed. Key findings are noted here in the report; and boroughs and housing associations have also been made aware of specific matters raised during visits to their sites.

Existing supply

5.4 The study provides a final figure for existing supply, based on a combination of data provided by councils, site visits and surveys; and drawing on the data set out and discussed in previous chapters (particularly Chapter 4). Fieldwork involved establishing how many pitches identified in data provided by boroughs were occupied; how many had temporary planning permission; and how many have and do not have planning permission. This information was used to confirm existing supply, and then to calculate the level of need.

[51] See Glossary for definitions of 'unauthorised development' and 'unauthorised encampment'.

5.5 As discussed in Chapter 4, Gypsy and Traveller site surveys did not take place in all London boroughs – either because the borough contained no pitches,[52] or because an accommodation needs assessment had recently been undertaken and new fieldwork was not considered necessary.[53] Tables 5.1 and 5.2 show pitches in London as recorded by the site surveys and borough GTANAs.

Table 5.1: Authorised[54] Gypsy and Traveller pitches[55]

Local Planning Authority	**Authorised local authority/housing association pitches**	**Authorised private pitches**	**Total pitches**
Barking and Dagenham	12	0	12
Barnet	0	0	0
Bexley*	26	0	26
Brent	31	0	31
Bromley	37	16	53
Camden	4	0	4
City of London	0	0	0
Croydon	20	0	20
Ealing (see OPDC below)	0	0	0
Enfield	0	0	0
Greenwich	41	3	44
Hackney	27	0	27
Hammersmith and Fulham***	0	0	0
Haringey*	10	0	10
Harrow	0	2	2
Havering*	0	183	183
Hillingdon	21	11	32
Hounslow	30	0	30
Islington	0	0	0
Kensington and Chelsea	20	0	20
Kingston upon Thames	18	17	35
Lambeth	16	0	16
Lewisham	0	0	0
Merton*	15	0	15
Newham*	15	0	15
OPDC**	24	0	24
Redbridge	17	0	17
Richmond upon Thames*	12	0	12
Southwark	38	0	38
Sutton	28	12	40
Tower Hamlets	19	0	19
Waltham Forest	12	5	17
Wandsworth	11	0	11
Westminster	0	0	0
Total	504	249	753

[52] Barnet, Ealing (area covered by Ealing LPA), Enfield, Hammersmith and Fulham, Islington, Lewisham, Westminster. Note: although fieldwork was carried out at a site in Ealing, this was in the part of the borough covered by OPDC, shown by ** in Table 5.1 and applies to Tables 5.1 and 5.3
[53] Bexley, Haringey, Havering, Merton, Newham, Richmond upon Thames, shown by * in Table 5.1
[54] Pitches with full planning permission
[55] *** LBHF site shared with RBKC, as site used to be in LBHF but is now in RBKC – applies to Tables 5.1 and 5.3

Table 5.2: Unauthorised Gypsy and Traveller pitches[56] and pitches with temporary permission

Local Planning Authority	**Unauthorised development pitches**	**Pitches with temporary permission**	**Total pitches**
Barking and Dagenham	0	0	0
Barnet	0	0	0
Brent	0	0	0
Bromley	34	3	37
Camden	0	0	0
City of London	0	0	0
Croydon	0	0	0
Ealing	0	0	0
Enfield	0	0	0
Greenwich	0	0	0
Hackney	0	0	0
Hammersmith and Fulham	0	0	0
Haringey	0	0	0
Harrow	0	0	0
Havering	32	0	32
Hillingdon	0	0	0
Hounslow	0	0	0
Islington	0	0	0
Kensington and Chelsea	0	0	0
Kingston upon Thames	0	0	0
Lambeth	1	0	1
Lewisham	0	0	0
Merton	0	0	0
Newham	0	0	0
OPDC	0	0	0
Redbridge	0	0	0
Richmond upon Thames	0	0	0
Southwark	0	0	0
Sutton	0	0	0
Tower Hamlets	0	0	0
Waltham Forest	0	0	0
Wandsworth	0	0	0
Westminster	0	0	0
Total	67	3	70

5.6 Tables 5.3, 5.4 and 5.5 refer only to boroughs where site surveys occurred and come from the site surveys. In total, surveys took place at 492 authorised pitches: of which 426 were local authority or housing association-owned or managed pitches with permanent planning permission; and 66 privately owned pitches with permanent planning permission. Surveys also took place on 35 unauthorised pitches, and three pitches with temporary permission.

[56] Pitches without planning permission

Table 5.3: Authorised Gypsy and Traveller pitches where site fieldwork took place

Local Planning Authority	Authorised local authority/housing association pitches	Authorised private pitches	Total pitches
Barking and Dagenham	12	0	12
Brent	31	0	31
Bromley	37	16	53
Camden	4	0	4
Croydon	20	0	20
Ealing	0	0	0
Greenwich	41	3	44
Hackney	27	0	27
Hammersmith and Fulham	0	0	0
Harrow	0	2	2
Hillingdon	21	11	32
Hounslow	30	0	30
Kensington and Chelsea	20	0	20
Kingston upon Thames	18	17	35
Lambeth	16	0	16
OPDC	24	0	24
Redbridge	17	0	17
Southwark	38	0	38
Sutton	28	12	40
Tower Hamlets	19	0	19
Waltham Forest	12	5	17
Wandsworth	11	0	11
Total	426	66	492

Table 5.4: Unauthorised Gypsy and Traveller pitches and pitches with temporary planning permission where site fieldwork took place

Local Planning Authority	Unauthorised	Temporary	Total
Barking and Dagenham	0	0	0
Brent	0	0	0
Bromley	34	3	37
Camden	0	0	0
Croydon	0	0	0
Ealing	0	0	0
Greenwich	0	0	0
Hackney	0	0	0
Hammersmith and Fulham	0	0	0
Harrow	0	0	0
Hillingdon	0	0	0
Hounslow	0	0	0
Kensington and Chelsea	0	0	0
Kingston upon Thames	0	0	0
Lambeth	1	0	1
Redbridge	0	0	0
Southwark	0	0	0
Sutton	0	0	0
Tower Hamlets	0	0	0
Waltham Forest	0	0	0
Wandsworth	0	0	0
Total	35	3	38

Table 5.5: Authorised occupied, vacant[57] and potential[58] Gypsy and Traveller pitches where site fieldwork took place

LPA	Occupied	Vacant	Potential	Total
Barking and Dagenham	10	2	0	12
Brent	31	0	0	31
Bromley	39	3	11	53
Camden	4	0	0	4
Croydon	20	0	0	20
Greenwich	44	0	0	44
Hackney	27	0	0	27
Harrow	2	0	0	2
Hillingdon	32	0	0	32
Hounslow	30	0	0	30
Kensington and Chelsea	20	0	0	20
Kingston upon Thames	35	0	0	35
Lambeth	16	0	0	16
OPDC	24	0	0	24
Redbridge	17	0	0	17
Southwark	33	0	5	38
Sutton	32	0	8	40
Tower Hamlets	19	0	0	19
Waltham Forest	17	0	0	17
Wandsworth	8	3	0	11
Total	460	8	24	492

Site survey findings

Survey response rates

5.7 RRR, the GLA and the Steering Group agreed that a survey response rate of 80 per cent from this cohort would be acceptable (see paragraph 4.28). The number of responses to the site survey required to achieve this was based on the number of pitches occupied at the time of the site surveys. This includes pitches with permanent or temporary planning permission, and unauthorised developments. As shown in Table 5.6, this assessment achieved an average 96 per cent response rate across all boroughs where site surveys took place, and above 90 per cent in each of these 20 LPAs.

[57] Pitches with planning permission but not occupied
[58] Pitches with planning permission expected to be developed in the first five-year period of the assessment period

Table 5.6: Survey response rate on occupied authorised (permanent and temporary) and unauthorised developments[59]

Local Planning Authority	Occupied pitches	Surveys	Response rate
Barking and Dagenham	10	10	100%
Brent	31	30	97%
Bromley	76	71	93%
Camden	4	4	100%
Croydon	20	20	100%
Greenwich	44	40	91%
Hackney	27	25	93%
Harrow	2	2	100%
Hillingdon	32	32	100%
Hounslow	30	30	100%
Kensington and Chelsea	20	20	100%
Kingston upon Thames	35	33	94%
Lambeth	17	15	94%
OPDC	24	24	100%
Redbridge	17	17	100%
Southwark	33	33	100%
Sutton	32	30	94%
Tower Hamlets	19	19	100%
Waltham Forest	17	17	100%
Wandsworth	8	8	100%
Total	498	480	96%

5.8 Interviews also took place with 92 households residing on unauthorised encampments. Together with 480 responses recorded in Table 5.6, this resulted in 572 surveys being completed. The following findings (Tables 5.7 to 5.31) reflect the responses of all 590 households, which includes 18 households who did not complete the surveys. For these 18 households, information on occupancy and accommodation needs was obtained from family members and/or neighbours. In cases where data was unavailable, households that completed the survey, and those that did not, are categorised as “not stated” in the following tables.

5.9 The following section summarises the results of surveys undertaken with households living on sites. First, it provides an assessment of the size and quality of provision, and the occupancy, of pitches. It then reports respondents’ satisfaction with their accommodation; their access to and use of services; travelling patterns; and accommodation need.

[59] An unauthorised development refers to any building or use of land or buildings carried out without the required planning permission from the LPA. An unauthorised encampment refers to the occupation of land by Gypsies, Travellers, or other groups without the landowner’s permission and without planning permission for residential use. This typically involves the setting up of temporary living arrangements, such as caravans, mobile homes, or tents.

Size and quality of sites

5.10 Sites where fieldwork was undertaken varied in design, from some based on 'open-plan' principles – i.e., without clearly demarcated pitches – to those with pitches clearly demarcated using fences, walls, or gates.

5.11 The size of pitches within the study area varied from relatively small (for example, with only sufficient space to accommodate a tourer or static caravan and a car) to relatively large (for example, those with sufficient space to accommodate a static caravan and/or two or three tourer caravans, as well as space for parking and storage, and a garden).

5.12 Whilst the size and layout of pitches varied across all tenure types, this was particularly evident in relation to local authority pitches. This variation occurred between sites, and within single sites. Some households stated that it was unfair that local authority pitches varied in terms of quality and size. This variation sometimes led to conflict between households residing on the same site, and competing for larger pitches when they became available.

5.13 Some households suggested that there is a need for pitches on local authority and private sites across London to be developed to a common standard. This would mean that all pitches would be of a standard size with access to the same facilities.

5.14 The decision on which pitches accommodated bungalows, and the size of the bungalows, was based on consultation with households. While the occupants of the bungalows are pleased with the high construction quality, some commented on how the bungalows take up most of the space on pitches, leaving little space for caravans on the site. This means that households had to choose between having a bungalow or space for a caravan.

Occupancy and tenure of pitches

5.15 Survey responses indicated that not all Gypsy and Traveller households within the study area remain on their pitches all year. While some households reside most of the time on their pitches, others mainly travel and use their pitches as a base. (Households' travelling patterns are covered at paragraphs 5.43 to 5.55, below.) However, this does not impact the accommodation needs figures: all Gypsy and Traveller households within the study area regard having a permanent pitch on a site as essential, including those who travel for much or most of the time.

5.16 Table 5.7 shows that just under two-thirds (66 per cent) of pitches included in the fieldwork were owned or managed by a local authority or housing association, whilst just over a tenth (12 per cent) were privately owned. Around a sixth were on pitches located on unauthorised encampments (16 per cent) and a smaller proportion on unauthorised developments (6 per cent).

Table 5.7: Accommodation tenure

Tenure	Number	%
Local authority/housing association pitch	390	66%
Unauthorised encampment pitch	94	16%
Private pitch	72	12%
Unauthorised development pitch	34	6%
Total	590	100%

5.17 Reflecting longevity of tenure, over three-fifths (61 per cent) of survey respondents had resided on their pitch for more than five years. In some cases, households had lived on the same pitch since it was first developed, and some survey respondents were born on the pitch they occupy. Just under two-fifths (39 per cent) of respondents had resided on their pitch for up to two years (18 per cent) or between three and five years (21 per cent).

Table 5.8: Time at current accommodation

Years	Number	%
More than 5 years	361	61%
3-5 years	124	21%
0-2 years	105	18%
Total	590	100%

5.18 Households were asked if they or a member of their household need to move in the next five years. Table 5.9 shows that more than half of households (52 per cent) said they did not need to move within the next five years. Around a seventh (14 per cent) said they did need to move within the next five years. No households residing on unauthorised encampments stated that they intended to stay more than a few days at the current location. Some households residing on local authority or housing association managed or owned pitches stated that they may need to move if site conditions did not improve.

5.19 Some households stated that they may move (either within or outside London), due to their current site not meeting their accommodation needs (for example, being too small to accommodate all household members); concerns about the condition of their site; safety concerns about their site; or for health reasons. It should be noted that some households indicated that remaining household members may continue to occupy a pitch, even if other household members move to separate accommodation. This suggests that household movement does not always lead to vacant pitches.

Table 5.9: Need to move within the next five years

Response	Number	%
No	308	52%
Maybe	144	24%
Yes	79	14%
Don't know/not stated	59	10%
Total	590	100%

5.20 The size of households on pitches varied between one and 15 persons (see Table 5.10). The age of pitch occupants ranged from newborn to over 85 years of age.

Table 5.10: Number of persons per pitch

Persons per pitch	Number of pitches	%
6–10 persons	221	37%
Over 10 persons	151	26%
3–5 persons	127	22%
1–2 persons	91	15%
Total	590	100%

Condition of sites and satisfaction with accommodation

5.21 The condition of sites was determined by a combination of observing sites and seeking the views of residents during visits. The condition of sites varied throughout the study area. Some sites are in urgent need of renovation or redevelopment, whilst the high quality of others means that they can be promoted as ideal sites. Most local authority managed/owned sites need some remedial work, ranging from a major redevelopment of the whole site to more general improvements and repairs. The latter include repairing/replacing facilities such as utility blocks, day rooms and boundary fencing or walls. Generally, privately owned and managed Gypsy and Traveller sites across London are in better condition than local authority sites.

5.22 The survey asked respondents how satisfied they are with their accommodation. Table 5.11 shows over two-fifths of were either 'very satisfied' (14 per cent) or 'satisfied' (27 per cent) with the site they currently occupy, and a quarter (25 per cent) of respondents were 'neither satisfied nor unsatisfied'. However, just under a fifth (17 per cent) stated that they are 'unsatisfied' with the site they occupy, with around a seventh (12 per cent) being 'very unsatisfied'. This compares with 5.9 per cent of respondents to the English Housing Survey (EHS) (2022-23) who were 'very' or 'fairly' dissatisfied with their current accommodation.[60]

5.23 There was some variation in satisfaction between respondents living on private sites and those living on local authority sites. Most households on private sites were either

[60] The English Housing Survey (EHS) is a comprehensive national survey, commissioned by MHCLG and conducted annually in England, to collect data on housing conditions, energy efficiency, and the demographic characteristics of residents. See: MHCLG, English Housing Survey 2022 to 2023: satisfaction and complaints – fact sheet 18 July 2024; last updated 12 February 2025

satisfied or very satisfied with the condition and location of their sites. Occupants of local authority sites were generally more likely to state that they were 'dissatisfied' or 'neither satisfied nor unsatisfied' with their current site.

5.24 All survey respondents stated that it is important for them to live with family on sites with sufficient space and good facilities, irrespective of the type of accommodation they occupy. They regarded owning the land on which they live, with family living close by, as ideal. They considered that having a private site for them and their close family provides security for the household, their wider family and future generations. Residing on privately rented land was their preferred alternative where owning land is not possible. However, they acknowledged the importance of local authority sites. They commented on how these are vital, particularly in London, where available land is so scarce, and the price of land high. Some commented on how local authorities, whilst acknowledging families wanting to own sites, should protect and improve the standard of local authority owned sites.

Table 5.11: Satisfaction with site

Satisfaction level	**Number**	**%**
Satisfied	160	27%
Neither	139	24%
Unsatisfied	102	17%
Very satisfied	79	14%
Very unsatisfied	70	12%
Don't know/not stated	40	6%
Total	590	100%

5.25 Whilst responding to survey questions about their sites, some households residing on permanent private sites commented on wanting to make improvements to their sites, but being unable to do so, due to a lack of finance or space constraints. Households commented on how, depending on planning and financial constraints, owning land provides them with the opportunity to develop it. Households residing on unauthorised developments or sites with temporary planning permission felt unable to invest too much in their sites, due to not having permanent planning permission, and fear of not being able to secure planning permission and then having to move.

5.26 The survey asked respondents what they like about where they live. They were able to identify multiple factors. Table 5.12 shows the most common/frequent responses.

Table 5.12: Like about where they live

Reason	Number	%
Living with/near family	451	76%
Local area	340	58%
Good/close to facilities	318	54%
It's our home	295	50%
Local community	211	36%
Feel safe	169	29%
Security for family's future	155	26%
Transport links	115	19%

5.27 Similarly, the survey asked respondents what they do not like about where they live. Again, they were able to identify multiple factors. The following are the most common/frequent responses:

Table 5.13: Don't like about where they live

Reason	Number	%
Accommodation in poor condition	350	59%
Site is urgently in need of repair	274	46%
Repairs never get done	253	43%
Would prefer to own a site	251	43%
Not enough space	241	41%
Can't get things delivered to the site	151	26%
Parking problems	129	22%
Too far from family	127	22%
Too many people on site	121	21%
Site overlooked	104	18%
No security	102	17%
Safety issues	101	17%
Racism and/or harassment	100	17%

Access to and use of services

5.28 As well as having sufficient space and facilities on site, good access to local services (including education, health and retail facilities) were important to respondents. Households spoke about how having access to services such as health and education is essential for both adult members of the household and children. They also commented on how living close to family and other members of the Gypsy and Traveller communities was important, as family and the community provide most of the help and support they need. The following sets out households' comments and observations about accessing and using key services.

5.29 Although respondents regarded access to services and facilities as important, they stated that it is not important that these are close, provided they are accessible by car. They noted that access to services for households without access to transport – for example, due to age or health issues – could be problematic, although explained such households were usually supported by family or neighbours. Households deemed it more important to live on a site, and for family members to live close together, than to have access to any particular service.

5.30 Households commented on barriers to services, including the following:

- Some delivery services are not willing to deliver goods to sites.
- Mail is not delivered to all sites, meaning that some households have to collect mail from collection points.
- Royal Mail post is delivered to site managers, rather than individual pitches, on some local authority sites.
- Some services will not visit sites without the police being present, even though there is no evidence of risk to service providers.
- Companies do not provide services (including repairs, carpeting, etc.) once they are aware that an address is located on a site.
- Gypsies and Travellers being refused entry to shops, pubs and other venues.
- Gypsy and Traveller households do not know where they can turn for help.
- Emergency services being unable to get close to pitches, due to lack of space, because of, for example, parked cars or a narrow, restricted entrance.
- Emergency services not providing or maintaining fire and safety equipment on sites.
- Lack of trust in service providers.

Health

5.31 Households were asked questions regarding the health and mobility of household members. As shown in Table 5.14, just over nine-tenths (91 per cent) of survey respondents stated that household members are registered with a GP.

Table 5.14: Registered with GP

Registered	**Number**	**%**
Yes, registration	538	91%
Don’t know/not stated	40	7%
No	12	2%
Total	590	100%

5.32 Households recognised that it can be difficult to access a doctor, irrespective of ethnic identity or culture. However, some Gypsy and Traveller households stated that they experience discrimination when registering at local surgeries. This can take the form of surgeries stating that the waiting list for permanent registration is full when this is not the case.

5.33 Households were asked if they, or anyone else in their household, have any health or mobility issues. (Respondents could report more than one issue.) Most households had at least one member who experienced health or mobility issues. The health issues most commonly cited were mental illness (amongst children and adults); Attention Deficit Hyperactivity Disorder (ADHD) (children either already diagnosed or waiting to be diagnosed); breathing-related health issues, such as asthma and Chronic Obstructive Pulmonary Disease (COPD) (both children and adults); and physical disability (primarily adults). Just over a fifth (21 per cent) of survey respondents stated that their household contains someone with a learning disability; under a fifth (18 per cent), someone with a visual, hearing or speech disability; under a fifth (18 per cent), an adult with a physical disability; and a tenth (10 per cent), a child with a physical disability (households may contain more than one person with a disability). This compares with over a quarter (27 per cent) of households in London recorded by the 2021 Census that contain someone with a disability.[61]

Table 5.15: Health or mobility issues

Health or mobility issue	Number	%
Mental health issue	391	66%
Asthma/COPD	299	51%
Long-term illness	197	33%
No health issues stated	154	26%
A learning disability	125	21%
Visual, hearing or speech disability	109	18%
Physical disability (adult)	105	18%
Physical disability (child)	58	10%

Education

5.34 All households surveyed regarded education as important. They spoke of how education, including learning to read and write, and gaining skills and qualifications, was becoming more important amongst Gypsy and Traveller communities. Some households commented on the increasing need for children to have a full education, including attending college and university; and how the tradition of not sending Gypsy and Traveller children to secondary school is changing.

5.35 Despite these changing attitudes to education, some respondents continue to believe in removing their children from school when they reach the age for secondary school. This is consistent with research undertaken by the ONS (2022), which commented on how participants from Gypsy and Traveller communities described experiencing varying levels of education, with some having never been to school; and some having completed compulsory education, and gaining college or university-level qualifications.[62]

5.36 When asked about their children's education, about a third of households spoke of their children staying in education not only to gain the basics, but also to continue into secondary and, in some cases, college and university education.

5.37 Households all spoke of the importance of every generation learning the culture and skills linked to their way of life, and the importance of keeping their culture, whilst gaining a good education. Households residing on sites without permanent planning

[61] ONS, RM060 – Household composition by number of people in household with a disability
[62] ONS, Gypsies' and Travellers' lived experiences, education and employment, England and Wales: 2022, 7 December 2022

permission (including those residing on unauthorised developments and encampments with need of a pitch, and those on pitches with temporary planning permission) commented on how their children's education was one reason they were keen to secure permanent status.

5.38 Almost three-quarters (74 per cent) of households surveyed contained school-age children (Table 5.16). Of those, 67 per cent have one or all of their children in school. The three main reasons respondents reported for children not attending school (primarily secondary school) were: bullying; preferring their children to be taught at home; and following cultural traditions.

5.39 Some households reported that all children of primary school age initially attended school, although some were later removed from school due to bullying. Households residing on unauthorised sites are sometimes unable to send children to school, due to a lack of permanent address and potentially being moved on. Educational opportunities and access for children in households that must relocate – whether due to eviction from an authorised site after breaching licensing rules, or being moved from an unauthorised encampment or development – are disrupted, regardless of the household's approach to education.

Table 5.16: School-age children in the household

Children in household	**Number**	**%**
Yes	434	74%
No	114	19%
Not stated	42	7%
Total	590	100%

Table 5.17: School-age children attending school

Attend school	**Number**	**%**
Yes – some children	166	38%
Yes – all children	127	29%
No	102	24%
Not stated	39	9%
Total	434	100%

Table 5.18: Reasons for school-age children not attending school

Status	Number	%
Cultural reasons	161	60%
Prefer to be taught at home	158	59%
Bullying	102	38%
Seasonal movement	71	26%
Unable to get into the right school	51	19%
Evictions/being moved on	45	17%
Transport problems	35	13%
Parent/carer's illness or disability	24	9%
Transport problems	35	5%

Employment

5.40 Households surveyed also regarded employment as important. Whilst answering questions about their employment, households spoke of how Gypsies and Travellers will travel if they are unable to gain sufficient work locally. Survey respondents commented on how traditional employment opportunities for Gypsies and Travellers are now less available, hence education was becoming more important.

5.41 Survey respondents were asked about their employment status and that of adult members of their households. This varied. Respondents and members of their households who reported working were mainly self-employed, with some occupants employed locally, unemployed, homemaker or retired. Some of those over retirement age (67) were still working (including being self-employed) to manage their finances.

5.42 Table 5.19 shows the main type of employment undertaken by respondents and their household members. Most households with more than one working-age adult had at least one person in some form of employment, with self-employment as the main type of employment (51 per cent compared with the London average of 16 per cent of economically active adults in London aged 16-64).[63] As Table 5.19 shows, just over a fifth (22 per cent) of respondents described themselves as either unemployed or a homemaker. This is disproportionately high when compared with 2021 Census HRP data for London as a whole (3 per cent) (see Table 3.9). However, survey and Census HRP data are not directly comparable, because the category for unemployment in the survey data also includes homemakers. Additionally, the GTANA determines the employment status of family members, while the 2021 Census data records the employment status of HRPs.

[63] ONS, Employment by Self-Employed, Full time and Part time and Gender, Borough, April 2024

Table 5.19: Employment status

Status	Number	%
Self-employed	299	51%
Unemployed/homemaker	129	22%
Not stated	100	17%
Retired	21	4%
Employed full-time	19	3%
Employed part-time	14	2%
Carer	8	1%
Total	590	100%

Travelling patterns

5.43 Gypsy and Traveller households surveyed regard travel as primarily for cultural and social reasons; but also emphasise that travelling is only one part of their culture. Households suggested that it can be difficult to travel due to limited stopping places, being moved on, and the increasing costs of travelling.

5.44 Households also expressed concerns about recent changes to the law (specifically the Police, Crime, Sentencing and Courts Act 2022). Whether they travel or not, households commented on how this legislation has made them feel that their whole identity is at risk. Many saw it as the state trying to wipe out them and their culture.

5.45 The survey asked respondents whether they or members of their household travel. 54 per cent stated that at least one, if not all, members of their household still travel and had travelled in the last 24 months.

Table 5.20: Travelled in the last 24 months

Travelled	Number	%
Yes	320	54%
No	199	34%
Not stated	71	12%
Total	590	100%

5.46 Some households travel all year round, due to factors such as not having a site (particularly those on unauthorised encampments and those having to double up on family pitches); having a site but travelling due to work; or travelling as part of their culture. Those who travel for work cited work-related reasons for travelling, such as buying and selling horses; building and construction work; and garden and maintenance work. Others travel primarily during summer months – to meet up with and/or stay with family and friends; to maintain cultural traditions, and for their children to experience these traditions; and to attend Gypsy and Traveller events (such as horse fairs or Christian events).

5.47 However, survey respondents commented on how fewer households travel for work now, compared with previous generations. They explained that they are more likely to be employed locally, and that there is greater emphasis on ensuring that children gain an education.

Table 5.21: Reasons households travel

Response	Number	%
Culture	391	66%
Visit family/friends	289	49%
For work	195	33%
Site overcrowded, so travel now and again	143	24%
Holiday	106	18%
Don’t know/not stated	101	17%

Table 5.22: Main reason households living on unauthorised encampments travel

Response	Number	%
Don’t have a choice, lack of site provision	25	42%
Have a base, visiting	19	32%
Don’t want a site, prefer to keep travelling	14	23%
Don’t know/not stated	2	3%
Total	60	100%

5.48 Households were asked whether they would permanently stop travelling in the next five years. As Table 5.23 shows, just under a fifth (18 per cent) of households have already stopped travelling, whilst just under a tenth (9 per cent) plan to do so in the next five years.

Table 5.23: Planning to stop travelling in the next five years

Response	Number	%
No	340	58%
Already stopped	104	18%
Don’t know/not stated	91	15%
Yes	55	9%
Total	590	100%

5.49 Of the 9 per cent respondents who stated that they will stop travelling in the next five years, around an eighth (13 per cent) stated that they will do so within the next 12 months; just under a fifth (16 per cent) within one to two years; and just over a quarter (27 per cent) within three to five years.

Table 5.24: When planning to stop travelling permanently

When	Number	%
Don’t know/not stated	24	44%
In 3-5 years	15	27%
In 1-2 years	9	16%
Within the next 12 months	7	13%
Total	55	100%

5.50 Table 5.25 explains the reasons households have either already stopped travelling or plan to stop travelling. Whilst not listed as reasons for stopping travelling in the survey question, the COVID-19 pandemic and the cost-of-living crisis were highlighted in discussions as playing a significant role in people's travel patterns, along with changes in the law that have made it harder for households to travel.

Table 5.25: Reasons for stopping travelling

Reason	Number	%
Restrictions enforced on travelling	72	45%
Lack of places to stop	57	36%
Age/too old	51	32%
Threat of evictions	47	30%
Employment	35	22%
Settled	31	19%
Safety/harassment	26	16%
Health and/or support needs	22	14%
Education/access to schools	15	9%

5.51 Survey respondents were asked what issues they and/or household members experience whilst travelling. Nearly half (44 per cent) referred to how restrictions enforced on travelling affected their ability to travel. Unless they are travelling to a location which has places specifically designated for Gypsies and Travellers (such as fields allocated at horse fairs and Christian events), there is a risk they may be moved on. Respondents stated that they may experience harassment at locations such as caravan holiday camps, which they booked and paid for before travelling. Some households experienced harassment from people who were not necessarily from the local area but were passing through.

5.52 Over a quarter of respondents identified a lack of access to basic facilities (32 per cent) or the increasing cost of travelling (29 per cent) as impacting their ability to travel. They commented on how the cost of petrol and running generators is becoming too expensive to justify travelling. Some stated that, for the first time (except during the COVID-19 lockdown), they and their family were not visiting Appleby Horse Fair, as they could not justify the cost. They also mentioned that the cost-of-living crisis was affecting not only their daily lives, but their ability to decide whether and when they could travel. Respondents also commented on a lack of access to basic facilities – such as showers, toilets and waste disposal – when travelling. As an exception, most managed events were held at locations with basic facilities.

5.53 Around a quarter (26 per cent) of respondents stated that the attitude of police or local authority officers affected their ability to travel. Whilst respondents expected that they may be moved on from some locations, it was the way in which the enforcement took place that was important to them. They noted enforcement may be undertaken in a supportive and understanding manner, including giving households time to prepare to leave. This attitude was regarded by some respondents as 'humane' and non-confrontational. However, some evictions were undertaken in an adversarial way that households found degrading.

5.54 A small proportion (8 per cent) of respondents stated that the behaviour of other Gypsies and Travellers can cause problems when travelling. They commented on how family groups tend to prefer to stay with those they know and not be forced to stop with or near other Gypsy and Traveller groups or individuals, as this can lead to conflict. Most households regard negotiated stopping as the most effective way to address unauthorised encampment and transit households. Unlike transit sites, negotiated stopping will enable them to stop in a place away from other groups of Gypsies and Travellers they do not know.

Table 5.26: Problems while travelling

Reason	Number	%
Lack of stopping places	275	47%
Discrimination, abuse and harassment	262	44%
Lack of basic facilities	189	32%
The increasing cost of travelling	173	29%
Harassment from police/local authority officers	152	26%
No response	85	14%
Behaviour of other Gypsies and Travellers	45	8%

5.55 As noted at paragraph 5.50, households commented on how the COVID-19 pandemic affected their travelling patterns as well as their day-to-day lives. Knowing that they would be unable to travel and meet up, some gathered on sites prior to the initial lockdown, so that households could remain together. For some households, the impact of COVID-19 had been longer-lasting, with some households not travelling after lockdown restrictions were lifted. Households also commented on how many occupants of pitches or sites had contracted COVID-19, some of whom had died.

Accommodation need

5.56 The following summarises the findings of the survey of Gypsy and Traveller households regarding the need for both transit and permanent accommodation. All household survey respondents recognised the need for both permanent and transit provision. Whilst the survey asked respondents for their views on whether more provision is needed, these are not the basis for the needs figures that the report presents. Rather, the needs figures are based on an analysis of accommodation need involving the steps set out later in this chapter.

Need for transit accommodation

5.57 Households were asked if they thought there was a need for more transit sites in the area and/or a negotiated stopping approach. This question was not about whether respondents needed a pitch themselves, but whether they thought more pitches were needed in the local area (their borough and in London). As shown in Table 5.27, more than nine-tenths (91 per cent) of survey respondents stated that more transit provision is needed in the area.

Table 5.27: Need for more transit provision

Response	Number	%
Yes	539	91%
Don't know/not stated	51	9%
No	0	0%
Total	590	100%

5.58 Over two-thirds (67 per cent) regarded the implementation of a negotiated stopping policy as the most suitable way to meet need for transit accommodation (Table 5.28). This involves landowners agreeing to caravans being sited at suitable locations for an agreed and limited period, on specific terms and potentially with the provision of basic services, such as portaloos and waste disposal. Households living permanently on sites would also like more flexibility about the use and number of caravans allowed on their site, so that they can accommodate visiting family and friends for an agreed period.

Table 5.28: Preferred type of transit provision

Preference	Number	%
Negotiated stopping	397	67%
Both	110	19%
Don't know/not stated	61	10%
Transit site	22	4%
Total	590	100%

5.59 As mentioned at paragraph 5.44, households were concerned about the implications of the Police, Crime, Sentencing and Courts Act 2022. They commented that the Act makes it even more important to address the need for authorised pitches, including transit accommodation.

5.60 Whist this GTANA acknowledges that some boroughs (for example, Enfield and Hackney) already have a form of unauthorised encampment protocol in place, or systems that are similar to a negotiated stopping policy, survey responses highlight the need for boroughs to jointly implement a London-wide negotiated stopping policy (see Chapter 9 and Appendix 12).

Need for permanent accommodation

5.61 Households residing on sites were asked if, irrespective of their own needs, they thought there was a need for more permanent sites in their area. Over nine-tenths (93 per cent) (Table 5.29) stated that there is a need. Survey respondents residing in boroughs where site provision already exists stated that any new provision should not be located too close to existing provision.

Table 5.29: Are more permanent pitches needed?

Response	Number	%
Yes	550	93%
Don't know/not stated	40	7%
No	0	0%
Total	590	100%

5.62 Table 5.30 shows where households who need to move currently live; and where they would prefer to live. The original location figures do not include authorities without sites, or where fieldwork did not take place. The original location column shows where households lived at the time the survey was conducted.

Table 5.30: Preferred location (and original location)

Sub-region	Original location		Preferred location	
	No.	%	No.	%
South London	162	27%	107	18%
East London	151	26%	155	27%
West London	144	24%	121	20%
Central London	88	15%	44	7%
North London	45	8%	53	9%
Outside London	0	0%	11	2%
Not stated	0	0%	99	17%
Total	590	100%	590	100%

5.63 In relation to private sites, households commented on how planning permission and licences for a pitch should be granted for the site – not just in the name of the person seeking permission. They took this view because, if that person dies or leaves the site, others on the site might be at risk of eviction, as the status of the site might change. Households on local authority sites expressed similar concerns: if the person whose name the pitch is in dies or leaves, the rest of those living on the pitch might have to vacate the pitch; or apply for it, along with people who have been on the waiting list for many years.

5.64 Some households need to move due to a lack of space on current pitches. Factors include households with members who will need their own pitches within five years; hidden households on pitches resulting in overcrowding; and households residing on pitches that are too small to accommodate residents' caravans and vehicles.

5.65 Households who need to move stated their desire to stay with, or close to, family. Some owners of existing private sites with space to accommodate their own additional needs expressed an interest in adding extra pitches to their sites, with some considering applying for planning permission to do so. Household members in accommodation need residing on sites without space for expansion would prefer to live close to existing sites where their family live. Some survey respondents commented on having other land they could use to accommodate their household's need, and some had land or were considering buying land to develop a site and rent out pitches to those who need them (Table 5.31).

Table 5.31: Like to develop/expand site

Response	Number	%
Yes, develop	162	28%
No	202	35%
Yes, expand	39	7%
Applying for permission	30	3%
Already developing a site	56	10%
Don't know/not stated	101	17%
Total	590	100%

Calculation of accommodation need[64]

5.66 As explained in Chapter 4, the need for permanent pitches for Gypsies and Travellers in the study area is calculated using the model suggested in DCLG's (2007) guidance using the definition of Gypsies and Travellers in PPTS 2024 unless otherwise stated. This assessment determines accommodation needs for the GTANA's 10-year period in two five-year periods.

Need for Gypsy and Traveller pitches 2022-23 to 2026-27

5.67 The need for residential Gypsy and Traveller pitches in the study area for the first five years is assessed according to a 15-step process, based on the model referred to at paragraph 5.66, above. This assessment uses data derived from site visits and household surveys undertaken with Gypsy and Traveller households residing on pitches.

5.68 However, as explained in Chapter 4, it takes a different approach to calculating need with six boroughs for which data from their local GTANAs has been used. This is detailed below, in the account of the different calculation stages.

5.69 Due to these borough GTANAs' differing methodologies, it is not possible to directly incorporate the six boroughs' GTANA supply and needs figures into the 15 steps. So, an additional step (Step 16) has been added to enable this. (However, it is omitted from individual borough calculations in Appendix 13.) Step 15 explains how the need for pitches for households in bricks and mortar has been calculated (see also Step 16 and individual borough calculations in Appendix 13).

5.70 The results of this assessment are shown in the tables in Appendix 13; and summarised below, in Table 5.32. Each step is explained after this table, along with the level of supply or need it determines.

5.71 As the steps below show, the need for additional pitches during the period 2022-23 to 2026-27 derives from:

64 Please note that, due to rounding, column totals may differ slightly from row totals.

- households living in unauthorised development pitches (including pitches that are identified as tolerated, but without full planning permission)
- households residing on unauthorised encampments in need of a permanent accommodation
- new household formation
- households residing on authorised sites requiring more space.

5.72 Accommodation need also derives from households residing in bricks and mortar accommodation. Both households residing on sites who were surveyed, and stakeholders who were consulted, commented on how it is important to acknowledge this component of accommodation need.

Table 5.32: Need for permanent Gypsy and Traveller site pitches 2022-23 to 2026-27

1) Current occupied permanent residential site pitches	460
Additional accommodation supply	
2) Number of unused residential pitches available	8
3) Number of existing pitches expected to become vacant	15
4) Net number of households on sites expected to leave the area	6
5) Number of households on sites expected to move into housing	15
6) Residential pitches planned to be developed or to be brought back into use	24
Total additional supply	68
Additional accommodation need	
7) Needing permanent permission from temporary sites	3
8) Households seeking a pitch in the area	0
9) Households on transit pitches requiring residential pitches in the area	0
10) Households on unauthorised encampments requiring residential pitches	12
11) Households on unauthorised developments requiring residential pitches	35
12) Households currently overcrowded	128
13) Net new households expected to arrive from elsewhere	6
14) Newly forming households	132
15) Households in bricks and mortar needing site accommodation	368
16) Need identified from the six boroughs GTANAs/Local Plans	68
Total need	752
Balance of need and supply	
Total additional pitches needed	684

Need for pitches 2022-23 to 2026-27: steps of the calculation

5.73 The following information from local authorities and the Census, and evidence from the surveys, is used to inform the calculations:

- the number of Gypsies and Travellers housed in bricks and mortar accommodation who have need of a pitch
- the number of existing Gypsy and Traveller pitches
- the number of households residing on unauthorised encampments requiring accommodation (and surveyed during the survey period)
- the number of unauthorised developments (during the survey period)

- the number of temporary pitches
- the number of vacant pitches
- the number of planned or potential new pitches
- the number of transit pitches.

5.74 The remainder of this chapter describes the process for calculating the need for pitches for the first and second five-year periods; and presents the results of the calculation.

Supply of pitches 2022-23 to 2026-27

5.75 This section describes the supply steps (Steps 1 to 6). The section does not relate to the six boroughs whose GTANA/Local Plan needs are incorporated into this assessment and therefore does not include these boroughs' supply figures.

Step 1: Current occupied permanent site pitches

5.76 This is based on information provided by councils, and corroborated by site visits and household surveys. At the time of the survey, 460 authorised permanent pitches were occupied.

Step 2: Number of unused residential pitches available

5.77 This is based on the number of existing pitches with planning permission, available but not in use (i.e., vacant). There are currently eight vacant pitches in the study area.

Step 3: Number of residential pitches to become available through mortality

5.78 This step calculates the number of pitches that might be expected to become available through mortality. The same step is applied in conventional Housing Needs Assessments. However, the figures for mortality have been increased in accordance with studies of Gypsy and Traveller communities, which suggest a life expectancy approximately 10 years lower than that of the general population (see paragraph 4.48).

5.79 Applying a mortality rate of 2.825 per cent over the five-year period results in an additional supply of 15 pitches. Although vacant homes arising from mortality will not necessarily be made available to Gypsy and Traveller households (see paragraph 4.45), this assumption is necessary for the purposes of the assessment.

Step 4: Number of households in site accommodation expressing a desire to leave the study area

5.80 This relates to the number of households who intend to leave the study area, resulting in their respective pitch(es) being made available for others. This was determined by survey responses.

5.81 It was assumed that those currently residing on pitches expecting to leave the area permanently in the next five years – out of choice (Step 4) or moving into the area (Step 13) – would do so.

5.82 In the absence of any data derivable from primary or secondary sources (beyond anecdotal evidence) on whether households living on sites in London intend to move into the area, it is assumed that the outflow of households from the study area (Step 4) will be equivalent to the inflow (Step 13) and vice versa. In the absence of specific data, assuming that the inflow equals the outflow ensures that the model remains neutral; and avoids overestimating or underestimating the net migration effect.

5.83 Responses to survey questions show that there are six households intending to leave the study area in the next five years where everyone occupying a pitch will leave.

Step 5: Number of households in site accommodation expressing a desire to live in housing

5.84 For 15 of the households stating that they need to move into housing, this move will result in their pitch becoming vacant. In the other cases, where households expressed an interest or need to move into housing, this does not result in their pitch becoming vacant, as not all those residing on the pitch will leave.

5.85 This step will result in 15 pitches becoming vacant and contributing towards the additional supply.

Step 6: Gypsy and Traveller pitches planned to be developed or brought back into use

5.86 Pitches that will be developed or brought back into use are referred to as ‘potential’ pitches. Pitches that will be developed have been granted planning permission but not yet been developed. Potential pitches include those that have been partly developed, or that were previously occupied but are not currently and need redevelopment. The number of potential pitches is determined by local authority data and from an assessment of sites during visits.

5.87 There are 24 pitches in the study area that will be built or brought back into use during the first five years of the assessment period.

Need for pitches 2022-23 to 2026-27

5.88 The following steps are based on survey findings, and confirm how many pitches are needed. This section relates to all boroughs, including the six boroughs whose GTANAs and Local Plans are used (see Step 16 for data from existing GTANAs/Local Plans) and those with no sites (see Step 15, which is based on the whole of London and from data gathered and assessed in Chapter 7).

Step 7: Seeking permanent permission from temporary sites

5.89 This is determined by local authority data. It is assumed that households residing on pitches with temporary planning permission that expires between 2022-23 and 2026-27 will still require accommodation within the study area within that five-year period.

5.90 This results in a need of three pitches.

Step 8: Households seeking a pitch within the area

5.91 This is determined by survey data. These households reported that they 'needed or were likely' to move to a different home in the next five years, or were currently seeking accommodation, and wanted to stay on an authorised site.

5.92 This category of accommodation need overlaps with those moving due to overcrowding, counted in Step 12; and so any households who are both overcrowded and seeking accommodation are deducted from this total.

5.93 This generates a total need in the study area of zero pitches.

Step 9: Households on transit pitches and/or negotiated stopping places (or equivalent) seeking Gypsy and Traveller pitches in the study area

5.94 This is determined by survey data. It would include any households on transit pitches or negotiated stopping sites who reported that they required permanent pitches within the study area in the next five years. However, there were no households in this position.

Step 10: Households on unauthorised encampments seeking Gypsy and Traveller pitches in the study area

5.95 Guidance (DCLG 2007) recommends considering whether households residing on unauthorised encampments require alternative accommodation. Using survey data, it has been calculated how many households on unauthorised encampments want Gypsy and Traveller pitches in the study area. Please note that only Gypsies and Travellers requiring permanent accommodation within the study area have been included in this calculation. Gypsies and Travellers on transit sites are included in Step 9.

5.96 Surveying 94 households living on unauthorised encampments revealed that 12 of these households require an authorised, permanent pitch in the study area.

Step 11: Households on unauthorised developments seeking Gypsy and Traveller pitches in the study area

5.97 Households on unauthorised developments were identified through analysis of council data; and verified by visiting sites to confirm developments' existence and whether they were occupied. There are 35 pitches on unauthorised developments, including pitches regarded by the local authority as tolerated, and those refused planning permission where enforcement action has been taken.

5.98 This resulted in a need for 35 pitches.

Step 12: Households on overcrowded Gypsy and Traveller pitches in the study area

5.99 Pitches are considered overcrowded if there is insufficient space to accommodate household members; and/or the pitch is unable to accommodate the number of caravans required to accommodate all household members. Pitches can also be overcrowded due to 'hidden' and/or additional households residing on the pitch without alternative accommodation (households 'doubling up'). This includes adult children; other household members; and couples in the process of divorce or separation where one of the former couple will need a separate pitch, or pitches.

5.100 This resulted in a need for 128 pitches.

Step 13: New households expected to arrive from elsewhere

5.101 In the absence of any data derivable from primary or secondary sources (beyond anecdotal evidence) on whether households residing outside London intend to move into the area, it is assumed that the inflow of Gypsies and Travellers to the study area will be equivalent to the outflow (Step 4).

5.102 As Step 4 identified six households intending to leave the study area in the next five years, Step 13 identifies the need for six additional pitches to accommodate households moving into the study area.

Step 14: New household formations expected from within existing households on sites

5.103 The number of individuals expected to leave pitches to create new households was estimated from survey data. This relates to the number of household members aged 16 or over at the time of the survey, and who respondents reported will require a separate pitch in the study area during the first five years of the study period.

5.104 This resulted in a need for 132 pitches.

Step 15: Households in bricks and mortar with need for a pitch

5.105 The method used to calculate the need for additional pitches arising from households in bricks and mortar is outlined in Chapters 4 and 7. It draws on responses to online surveys with GRT households residing in bricks and mortar. Chapter 7 determines that 19 per cent of those households need to move and have a cultural preference to live on a pitch (see paragraph 7.61). It identifies a need for 381 pitches for households in bricks and mortar with a cultural preference to live on a site.

5.106 Four of the six boroughs for which this assessment uses data from their GTANAs and/or Local Plans, identify a need for 13 pitches from those living in bricks and mortar. (See Appendix 13). For these four boroughs the London-wide online survey of households in bricks and mortar identifies a need for 57 pitches (see paragraphs 4.68 to 4.71). To avoid double counting, the need identified in the borough GTANAs and Local Plans is deducted from the need calculated using the London-wide online survey of Gypsy and Traveller households living in bricks and mortar (see Step 16 below).

5.107 This results in a total need for additional pitches from households living in bricks and mortar of 368 pitches.

5.108 In addition to need arising from cultural preference, there is need arising from overcrowding in housing and future household formation. However, as there is insufficient evidence to confirm the number of households in need for such reasons, boroughs need to consider any need for these reasons that might arise from households living in bricks and mortar during the London GTANA period separately from need identified in this assessment. According to DCLG guidance, they should do so through enquiries; applications for a council pitch; and planning applications.

Step 16: Households with need for a pitch from the six boroughs[65] as identified in their borough GTANA and Local Plan

5.109 As shown in Appendix 13 and Table 5.32, these boroughs' GTANAs and Local Plans identified a need for 68 additional pitches. This includes an additional need for 13 pitches for households in bricks and mortar, which are removed from Step 15 to avoid double counting but included here. The accommodation need of 68 pitches in Step 16 (Table 5.32) reflects net need these GTANAs identify after subtracting additional supply from the additional need. For these boroughs, the need shown in Table 5.32 relates to the definition of Gypsies and Travellers (see Appendix 17).

[65] Bexley, Haringey, Havering, Merton, Newham and Richmond upon Thames as set out in paragraphs 4.10 to 4.23, 4.61 to 4.73, and 5.5.

Balance of need and supply

5.110 Following the steps above, the total number of additional pitches needed is calculated by deducting additional supply from additional need.

Need for Gypsy and Traveller pitches 2022-23 to 2026-27

5.111 The following shows the additional accommodation need for the whole of London, based on Steps 1 to 16 (above).

Table 5.33: Summary of accommodation needs 2022-23 to 2026-27 (pitches)

Area	Pitches
Additional supply	68
Need	752
Study area total	684

Need for Gypsy and Traveller pitches 2027-28 to 2031-32

5.112 In calculating the future accommodation need beyond the first five-year period, the following assumptions are made, that by 2027-28:

- existing occupied pitches will still be occupied
- vacant pitches will be occupied
- potential pitches will have been developed and occupied
- households currently living in bricks and mortar housing who need to move and have a cultural preference to reside on a pitch rather than in bricks and mortar, and those living on unauthorised developments and encampments, will move onto sites within the first five-year period[66]
- any need not met in the first five-year period has been carried over to the second five-year period
- any additional supply not made available within the first five years has been removed from the supply and reinstated as part of the assessed need.

5.113 As such, only natural population increase and mortality need to be considered.

5.114 The starting point for calculating need for the second five-year period is the number of pitches (with planning permission and occupied) at the start of 2027-28. A total of 1,437 pitches are expected to be in place with planning permission and occupied by 2027-28.

[66] While this might be viewed as an optimistic assumption, it is necessary for the purpose of this assessment.

Table 5.34: Summary of steps in calculating pitch supply by 2027-28

Steps	
Pitch supply in 2022 (see Table 5.1)	753
Total need 2022-23 to 2026-27	684
2027-28 supply	1,437

5.115 Accommodation need between 2027-28 and 2031-32, identified by GTANAs of six boroughs, is included in the London GTANA's second five-year period. Consequently, a growth rate is not applied to these figures (see Step 16 in Table 5.32). The growth rate is only applied to total number of pitches in London less the supply and need identified by the six boroughs' GTANAs, i.e., 1,108 pitches. The calculation is as follows:

Table 5.35: Steps in calculating the baseline for 2027-28

Steps	
Pitch supply 2027-28 (Table 5.34)	1,437
Less the supply from the 6 boroughs (See Table 5.1)	261
Less need identified by the 6 boroughs up to 2026-27 (Step 16)	68
Net pitches	1,108

5.116 Next, the calculation of predicted population growth and need for the second five-year period is made. To determine accommodation needs for the period 2027-28 to 2031-32, this assessment applies a population growth factor. This factor is based on an analysis of local demographics using survey responses, including current population numbers; average number of children per household; older children becoming adults; and household formation rates. This is discussed in more detail in Chapter 4.

5.117 This analysis indicates an annual household growth rate of 3 per cent per annum (compound), equating to a five-year rate of 15.9 per cent. A mortality rate of 2.825 per cent over each five-year period is also applied. Together, these result in a net population growth rate of 13.1 per cent (15.9 – 2.825 = 13.075). This rate (13.075 per cent) is applied to 1,108 (i.e., net pitches less need and supply from the six boroughs up to 2026-27, as shown in the above table), which results in an additional need of 145 additional pitches.

5.118 For the six boroughs for which local GTANAs and/or Local Plans are used, the need for the second five-year period (2027-28 to 2031-32) is identified (or adjusted to align with this period – see Appendix 13). This need (32 pitches) is then added to the need for all other boroughs (133). The population growth rate is not applied to these six boroughs' needs arising from households living on pitches, as the existing assessments have already applied a growth rate. The growth rate is only applied to the need for pitches for those in bricks and mortar, which the London-wide survey identifies (12). This gives a London-wide total of 177 pitches.

5.119 The results of these calculations are shown in the table below:

Table 5.36: Summary of accommodation needs 2027-28 to 2031-32 (pitches)

Area	Pitches
Six boroughs' GTANAs identified need	32
London (excluding the six boroughs)	133
Six boroughs (based on bricks and mortar)	12
Study area total	177

Need for pitches 2022-23 to 2031-32

5.120 This chapter has presented and analysed both quantitative and qualitative data regarding key characteristics of households residing on Gypsy and Traveller sites. The tables below summarise accommodation needs resulting from the calculations in the tables above for the study area.

London-wide accommodation need

5.121 Table 5.37 provides the overall need for the 10-year period covered by the GTANA for the whole of London. Please note that the figures in brackets represent the accommodation needs for London; but for six boroughs use only the accommodation needs determined by their previously published local GTANAs (see paragraphs 4.61 to 4.73). Table 5.38 presents the accommodation need by sub-region and Table 5.39 by LPA (figures in brackets represent the accommodation needs determined by those boroughs' previously published GTANAs). Further information about accommodation need on a borough basis is presented in Appendix 13 for all cohorts and includes the steps used to calculate need.

Table 5.37: Summary of accommodation needs 2022-23 to 2031-32 (pitches)

Period	Need
2022-23 to 2026-27	684 (603)
2027-28 to 2031-32	177 (165)
Total	861 (768)

Table 5.38: Need for pitches by London sub-region

Sub-region	2022-23 to 2026-27	2027-28 to 2031-32	Total need 2022-23 to 2031-32
Central London	87	22	109
East London	253	73	326
North London	64	10	74
South London	133	38	171
West London	147	34	181
Total	684	177	861

Table 5.39: Accommodation needs 2022-23 to 2031-32 (pitches) by Local Planning Authority[67]

Local Planning Authority[68]	**2022-23 to 2026-27**		**2027-28 to 2031-32**		**Total need 2022-23 to 2031-32**	
Barking and Dagenham	14		3		17	
Barnet	14		2		16	
Bexley*	34	(1)	5	(1)	39	(2)
Brent	45		10		55	
Bromley	62		15		77	
Camden	9		2		11	
City of London	0		0		0	
Croydon	20		5		25	
Ealing	10		1		11	
Enfield	22		3		25	
Greenwich	41		12		53	
Hackney	32		8		40	
Hammersmith and Fulham**	19		5		24	
Haringey*	28	(14)	5	(3)	33	(17)
Harrow	11		2		13	
Havering*	45	(32)	28	(26)	73	(58)
Hillingdon	40		9		49	
Hounslow	28		7		35	
Islington	9		1		10	
Kensington and Chelsea**	0		0		0	
Kingston upon Thames	29		8		37	
Lambeth	13		4		17	
Lewisham	11		1		12	
Merton*	8	(6)	1	(0)	9	(6)
Newham*	30	(15)	4	(2)	34	(17)
OPDC***	9		4		13	
Redbridge	17		4		21	
Richmond upon Thames*	4	(0)	1	(0)	5	(0)
Southwark	32		9		41	
Sutton	9		7		16	
Tower Hamlets	13		4		17	
Waltham Forest	16		4		20	
Wandsworth	5		2		7	
Westminster	5		1		6	
Total	684		177		861	

5.122 The steps used to determine the need for transit pitches are as follows:

1. Using MHCLG Traveller Caravan Count data, determine the number of caravans recorded on unauthorised pitches in each London borough from January 2016 to January 2024.
2. Determine the number of caravans located on unauthorised developments, as determined by site visits undertaken at the same time or as part of the GTANA household survey:

67 Figures in brackets denote need (only) from borough GTANA/Local Plan
68 *six boroughs whose existing GTANA and/or Local Plan data is incorporated into the London GTANA
** shared with RBKC as site used to be in LBHF but is now in RBKC
*** site is located within the borough of Ealing

Table 5.40: Caravans on unauthorised developments

Borough	Caravans
Bromley	34
Havering	32
Lambeth	1
Total	67

3. To determine the number of caravans on unauthorised encampments, deduct the number of caravans on unauthorised developments from the number of caravans on unauthorised pitches in each London borough. This is consistently applied to each MHCLG Traveller Caravan Count between January 2016 and January 2024. No caravans were recorded on unauthorised pitches in Lambeth between January 2016 and January 2024. This means that deducting the one caravan recorded on an unauthorised development in the borough is unnecessary.
4. Determine the average number of caravans on unauthorised encampments between January 2016 and January 2024. Ten boroughs recorded caravans on unauthorised encampments:

Table 5.41: Average number of caravans on unauthorised encampments recorded by the MHCLG Traveller Count between January 2016 and January 2024

Borough	Caravans
Havering	56
Bromley	54
Kingston Upon Thames	37
Greenwich	7
Hounslow	5
Hackney	5
Enfield	3
Barnet	3
Ealing	2
Bexley	1
Total	174

5.123 Analysis of MHCLG Traveller Count data from January 2016 to January 2024, and GTANA survey data on the number of caravans on unauthorised developments, shows that transit provision across London is needed to accommodate 174 caravans (as shown in Table 5.41). Previous DCLG (2008) guidance advises that, wherever possible, each transit pitch should be of a size sufficient to accommodate two touring caravans, two parking spaces and private amenities.[69] This leads to a need for 87 transit pitches across London. However, given the reasons explained in paragraphs 4.56 to 4.60, this may underestimate the need for transit pitches.

[69] DCLG, Designing Gypsy and Traveller sites: good practice guide, p.47 para.8.28, May 2008,

6. Travelling Showpeople

Summary

This chapter summarises findings from surveys of Showpeople households living on Travelling Showpeople yards (completed in 2023). The surveys secured a 94 per cent response rate of households on all known yards and plots in boroughs where fieldwork was carried out (the accommodation needs of Travelling Showpeople living on yards in Havering are based on the borough's existing GTANA).

The chapter summarises quantitative and qualitative data on key characteristics of households residing on Travelling Showpeople yards. It covers this cohort's existing accommodation provision; health; employment; education; and current and future accommodation needs.

The chapter then assesses and calculates accommodation need for additional plots across London.

This assessment is based on an understanding of the occupancy of 91 plots across London, as confirmed through surveys and visits to the yards; responses to the survey; and, for two boroughs (Havering and Camden), their own information. Combined with the high survey response rate, this makes it a comprehensive assessment.

Survey responses cover several key aspects of the lives of Travelling Showpeople households across London. They show that most Travelling Showpeople households had lived on yards for over five years, with some having lived there for much longer. Most households live on privately owned or rented plots.

Respondents often stressed the importance of living close to family and friends. Additionally, Travelling Showpeople highlighted the need for space not only for living purposes, but also for storing and maintaining their equipment. In addition to having sufficient space and facilities in yards, good access to local services (including education, health and retail facilities) was important to households.

The COVID-19 pandemic significantly disrupted the travel patterns, employment and income of Travelling Showpeople. Many households face various health challenges, with mental health being the most frequently mentioned issue. Moreover, Travelling Showpeople often encounter a lack of understanding and discrimination, which restricts their access to and use of services.

Analysis of data based on survey responses shows that households need 66 additional plots from 2022-23 to 2026-27 and 17 additional plots from 2027-28 to 2031-32.

Introduction

6.1 As stated in Chapter 1, this GTANA considers the accommodation needs of Travelling Showpeople. Unlike Gypsies and Travellers, Travelling Showpeople are not considered to have an ethnic element to their identity. As such, they are not protected by the Equality Act 2010. Nonetheless, PPTS (2024) indicates that local authorities should consider the accommodation needs of Travelling Showpeople households.

Existing supply

6.2 As discussed in Chapter 4, surveys with Showpeople on yards took place across three of the five boroughs with Showpeople yards that are used for accommodation purposes. Initial estimates of the current number of yards and plots were made using data boroughs provided (see Chapter 3). These were later confirmed through visits to yards.

6.3 Tables 6.1 and 6.2 list the number, in each borough, of authorised plots; plots situated on unauthorised developments; and yards and plots with temporary planning permission in each borough. This was confirmed through visits as part of the Showpeople yard survey. There are 91 authorised plots in London, all occupied during the survey period. There are no transit plots, although existing yards informally provide space for households in need of temporary accommodation whilst visiting the local area. There are no vacant or potential plots (Table 6.1).

6.4 There has been a yard in Camden owned, operated and occupied by Showpeople from at least the 1950s until 2020. A planning appeal confirmed that, in 2017, the yard was used by Showpeople for residence, storing and maintaining equipment; but there is also a history of residential use unconnected to Showpeople. The yard was sold in late 2020, and is currently subject to an application for a Certificate of Lawful Existing Use or Development (CLEPUD) for use as mixed-use site for Travelling Showpeople and a residential caravan site. This awaits determination. When this GTANA commenced, and surveys were undertaken, it was understood that the family of Showpeople long associated with its ownership and operation had sold the yard to a non-Showperson and moved out of London. It is now understood that there remains a Showperson resident on site, along with some use of the site for show equipment. A visit to the yard during the fieldwork period, and analysis of information available and provided by the local authority, indicate that there is no additional need from the yard for Showpeople accommodation; and that there is a supply of one plot.

Table 6.1: Travelling Showpeople plots

	Authorised	Temporary	Unauthorised	Total plots
Bromley	33	0	0	33
Camden[70]	1	0	0	1
Havering[71]	5	0	0	5
Hillingdon	15	0	0	15
Hounslow	37	0	0	37
Total	91	0	0	91

6.5 Table 6.2 shows the number of occupied plots (both authorised and unauthorised), vacant plots (plots with planning permission but not occupied at the time of the survey), and potential plots (plots with planning permission expected to be developed or redeveloped, and occupied within the first five years of the assessment period) within boroughs with yards, in use by Showpeople, and included in the fieldwork. As in the case of Gypsies and Travellers (see Chapter 5), and as discussed in Chapter 4, no fieldwork was undertaken on the Travelling Showpeople yard in Havering. Instead, this GTANA incorporates accommodation need figures for Travelling Showpeople plots identified by Havering's previously published GTANA and Local Plan.

Table 6.2: Occupied, vacant and potential authorised plots

Borough	Occupied	Vacant	Potential	Total
Bromley	33	0	0	33
Camden [72]	1	0	0	1
Havering [73]	5	0	0	5
Hillingdon	15	0	0	15
Hounslow	37	0	0	37
Total	91	0	0	91

Survey response rate

6.6 When visiting yards, interviewers sought to undertake surveys on each plot. As discussed in Chapter 4, the fieldwork determined the accommodation needs of all Travelling Showpeople households residing on authorised and unauthorised plots in London, other than in Havering (see paragraph 6.5) and Camden (see paragraph 6.4).

6.7 As Table 6.3 shows, this assessment is based on an understanding of the occupancy and accommodation need of households on all 85 occupied plots (85 authorised and zero unauthorised). This represents a response rate of 94 per cent of all occupied authorised and unauthorised yards and plots.

[70] Based on information provided by the borough
[71] Based on Havering 2019 GTANA and 2021 Local Plan
[72] Based on information provided by the borough
[73] Based on Havering 2019 GTANA and 2021 Local Plan

Table 6.3: Survey response rate for authorised and unauthorised development plots

Borough	Occupied plots	Surveys completed	Response rate
Bromley	33	31	94%
Hillingdon	15	14	93%
Hounslow	37	35	95%
Total	85	80	94%

Yard survey findings

6.8 The section above outlines the provision of accommodation (paragraphs 6.2 to 6.5), and response rate (paragraphs 6.6 to 6.7). The following presents analysis of survey responses related to accommodation, including occupancy and satisfaction with accommodation.

Occupancy of plots

6.9 From visits to yards, it was clear that most yards have marked boundaries, with plots clearly demarcated by fences, walls or gates. Plots within the study area varied from relatively small (with only sufficient space to accommodate a caravan and a car) to relatively large (with sufficient space to accommodate several large caravans, fairground equipment and/or two or three touring caravans, as well as spaces for parking and storage, and a garden).

6.10 Engagement with Showpeople households during visits made clear that not all households remain on their plots all year. While most households live on their plots most of the time, some mainly travel and use their plots as a base. However, engagement with Showpeople households made clear that they considered having a permanent plot on a yard essential.

6.11 Most households have lived on their yard since it was first developed, and, in some cases, household members were born there. Three generations of the same family reside on some plots, leading in some cases to overcrowding and to the need for separate accommodation for newly forming households.

Table 6.4: Time at current accommodation

Years	Number	%
0-2 years	6	7%
3-5 years	10	11%
More than 5 years	69	82%
Total	85	100%

6.12 Members of overcrowded households were more likely to state that they and/or a member or members of their household need to move within the next five years. This included household members on their respective plot who are planning to develop new yards in locations where it is possible for them to purchase land and gain planning permission. These households moving would resolve some cases of overcrowding. However, it would not necessarily lead to vacant plots, as the remaining household members intend to stay on the current plot. Other households intending to move were located on plots that are under threat of being purchased for housing development, who may not have a choice about moving.

Table 6.5: Need to move within the next five years

Response	Number	%
No	35	41%
Don’t know/not stated	23	27%
Yes	15	18%
Maybe	12	14%
Total	85	100%

6.13 The number of people on each plot varied between one and 18. The ages of individuals ranged from newborn to over 85. Also, some households accommodate long- and short-term employees on yards.

Table 6.6: Number of people on each plot

Persons per plot	Number	%
1-2 persons	6	7%
3-5 persons	14	16%
6-10 persons	16	19%
More than 10 persons	49	58%
Total	85	100%

Satisfaction with accommodation

6.14 Households were asked how satisfied they were with their yard. Households were primarily neither satisfied nor dissatisfied with the condition and location of yards. Around a sixth (16 per cent) were not satisfied with their current accommodation. This compares with 6.9 per cent of respondents to the EHS (2022-23) who were ‘very’ or ‘fairly’ dissatisfied with their current accommodation.[74]

Table 6.7: Satisfaction with yard

Satisfaction	Number	%
Very satisfied	2	2%
Satisfied	14	17%
Neither	38	45%
Unsatisfied	12	14%
Very unsatisfied	2	2%
Don’t know/not stated	17	20%
Total	85	100%

6.15 Survey respondents were asked what they like about where they live. They were able to identify multiple factors. The following are the most common/frequent responses:

[74] See MHCLG, English Housing Survey 2022 to 2023: satisfaction and complaints - fact sheet, Table FA5401: Satisfaction with accommodation

Table 6.8: Like about where they live

Reason	Number	%
Living with/near family	84	99%
Residing with our community	84	99%
It’s our home	80	94%
Local area	53	62%
Feel safe	44	52%
Local community	41	48%
Good transport/road links	37	44%
Good/close to facilities	30	35%

6.16 Similarly, survey respondents were asked what they do not like about where they live. The following are the most common/frequent responses:

Table 6.9: Don’t like about where they live

Reason	Number	%
Not enough space	76	89%
Family having to disperse	68	80%
Lack of security	38	45%
Overlooked too much	29	34%
Accommodation in poor condition	14	16%

6.17 It was important to households that families can live together, with sufficient space to store and maintain equipment. Households had concerns about the level of overcrowding and lack of space both on their own plots and on their yards as a whole.

6.18 The need for more space, both to store and maintain equipment and to accommodate growing families, was a key concern. They commented on how, in the past, there were many more yards across London, but over the years, their number has fallen to fewer than 100 plots across only five boroughs (primarily on the outskirts of London).

6.19 Households expressed concern that plots have become, or are becoming, overcrowded, sometimes dangerously. They noted this means that many Showpeople households have to store their equipment in various locations. As there is limited opportunity for families to develop new yards locally, they are being forced to move away from local areas, and sometimes to move outside London. This results in families no longer being able to live close to one another, weakening traditional support networks.

6.20 The support network amongst fellow Traveling Showpeople (including family and friends) was a major reason for households emphasising the importance of family-owned yards being large enough to accommodate all family members; or privately rented yards being large enough to accommodate several Showpeople families.

6.21 Some households commented on wanting to improve their plots and yards, but were unable to do so due to financial and spatial constraints.

Access to and use of services

6.22 In addition to having sufficient space and facilities in yards, good access to local services (including education, health and retail facilities) was important to households. They spoke about how having access to services, such as health and education, is essential for both adults and children in their households. However, households stated that it is not important that these are close if they are accessible by car and/or public transport.

6.23 Like Gypsies and Travellers, Showpeople households commented that their access to and use of services is not only determined by practicalities, such as the location of their yard in relation to services. They noted that it also depends on their knowledge of services and how services work with the community. The latter includes services refusing Showpeople access, lacking understanding of their way of life, and grouping all members of travelling communities together. Households commented on how a lack of understanding about Showpeople and the discrimination they experience are key factors limiting their use of services.

Health

6.24 Most households were registered with a local GP, but not all confirmed whether they were registered.

Table 6.10: Registered with GP

Registered	Number of households	%
Yes, registered	73	86%
Don’t know/not stated	12	14%
No	0	0%
Total	85	100%

6.25 As with Gypsies and Travellers, Showpeople households recognised that it can be difficult for anyone to access a doctor, irrespective of a person’s ethnic identity or culture. Some experience discrimination when registering at local surgeries. This can take the form of surgeries stating that the waiting list for permanent registration is full when this is not the case.

6.26 Survey respondents were asked if they, or anyone else in their household, have any health or mobility issues. (Respondents could report more than one issue.) As with Gypsies and Travellers, health issues most commonly cited by Showpeople households were mental illness and physical disability, primarily among adults. Around a sixth (16 per cent) of households contained an adult with a physical disability; a seventh (14 per cent), an adult with a learning disability; a seventh (13 per cent), an adult with a visual, hearing or speech disability; and under a tenth (7 per cent), a child with a physical disability (households may contain more than one person with a disability). This compares with over a quarter (27 per cent) of households in London, as recorded by the 2021 Census, containing someone with a disability.[75] That figure, from the 2021 Census, includes households containing someone with either a physical or mental health condition lasting or expected to last 12 months or longer.

Education

6.27 When asked about education, it was clear that Travelling Showpeople regard this as important. They spoke about how it has always been important for their children to get a good education, gaining skills and qualifications. They also spoke of the importance of every generation learning their way of life and the skills linked to it, while gaining a good education. They saw a need for a balance between children gaining a good education, and learning about and experiencing the culture and traditions of Travelling Showpeople.

6.28 More than four-fifths (82 per cent) of households contained school-age children. School attendance was high, with 100 per cent of school-age children attending school. All children of relevant ages attended school.

Table 6.11: School-age children in household

Children in household	**Number**	**%**
Yes	70	82%
No	15	18%
Not stated	0	0%
Total	85	100%

Table 6.12: School-age children attending school

Children in household	**Number**	**%**
Yes – all attend	70	100%
Yes – some attend	0	0%
No	0	0%
Not stated	0	0%
Total	70	100%

Employment and travelling for work

6.29 Travelling Showpeople households regarded employment as important. Every plot contained self-employed Travelling Showpeople, with a few individuals undertaking different types of work locally. COVID-19 restrictions meant that some households had been unable to work. Whilst other businesses and self-employed people were able to gain financial support from the government, they could not. Some reported

[75] ONS, RM060 – Household composition by number of people in household with a disability

being told having the same home and work address was the reason. The lack of support resulted in more households seeking alternative work on a temporary basis.

6.30 Travelling Showpeople households travel mainly for work. However, households tend to travel less often than they used to; and, generally, not as far. This is because a larger proportion of families mainly work at local events and venues, or at least within a reasonable distance that enables them to travel to and from yards without staying overnight.

Accommodation need

6.31 The following summarises the findings of the survey of Showpeople households in relation to the need for both transit and permanent accommodation.

Need for transit accommodation

6.32 Households were asked if they thought there was a need for transit sites in the area and/or a negotiated stopping approach. More than four-fifths (82 per cent) of households stated there is a need; and no households stated that there is no need. Households commented on how the Police, Crime, Sentencing and Courts Act 2022 means there is even more need to provide transit accommodation, as well as permanent accommodation.

Table 6.13: Need for more transit provision

Preference	Number	%
Yes	70	82%
Don't know/not stated	15	18%
No	0	0%
Total	85	100%

6.33 In relation to transit provision, households regarded some form of negotiated stopping arrangement as an effective way of meeting the needs of Showpeople visiting the area. They noted that this approach is flexible in terms of the location and number of caravans that can be temporarily accommodated.

Table 6.14: Preferred transit provision

Preference	Number	%
Negotiated stopping	72	85%
Don't know/not stated	13	15%
Both	0	0%
Transit site	0	0%
Total	85	100%

6.34 Whilst Showpeople tend not to occupy unauthorised encampments, they, and Showpeople from outside London, do need accommodation when they are working away from where they live, or have family or friends visiting. In particular, households commented on the need to support those who are visiting an area for work – for example, for fairs and events. Existing yards try to help accommodate them, but they are already struggling for space. There is often limited, if any, space at event venues. Where Showpeople can stop over in their caravans at a venue, this tends to be for a limited time – and often not prior to the event opening and after it is closed. Even those living and working in London commented on how some form of flexibility would help and that negotiated stopping seems to offer what they need.

Need for permanent accommodation

6.35 Table 6.15 shows around three-quarters of households consider that there is a need for more permanent plots in their area. No respondents stated that there is no need. When yards were initially developed, there was sufficient space for both household members and equipment. However, an increasing number of people occupying the yards and larger equipment means that the yards are no longer large enough for both accommodation and storage. Households are now in urgent need of more space.

Table 6.15: Need for more permanent plots

Response	Number	%
Yes	65	76%
Don’t know/not stated	20	24%
No	0	0%
Total	85	100%

6.36 Households with accommodation needs desire to stay with, or close to, family. Some owners of sites with space to accommodate their own additional need are considering applying for planning permission to develop additional plots. Household members with accommodation need residing on yards without space for expansion would prefer to reside close to existing sites where their family live.

6.37 Some survey respondents commented on owning land they could use to accommodate family members. Some had land, or were considering buying land, to develop a site, in order to rent plots to other Travelling Showpeople households with accommodation need.

Calculation of accommodation need

6.38 As discussed in Chapter 4, the need for permanent plots for Travelling Showpeople in the study area is based on the model suggested in DCLG’s (2007) guidance. It uses the data derived from the surveys and yard visits. The following provides calculations of accommodation need for 2022-23 to 2031-32 in two five-year periods.

Need for Travelling Showpeople plots 2022-23 to 2026-27

6.39 The need for plots in the area is assessed according to a 13-step process, with an additional step to incorporate data from Havering's GTANA/Local Plan. The results of this are shown in Table 6.16 below, while the subsequent section contains explanations of the data and calculation used for each step.

Table 6.16 Summary of permanent plots needed for Travelling Showpeople 2022-23 to 2026-27

1) Current occupied permanent residential plots	91
Additional accommodation supply	
2) Number of unused residential plots available	0
3) Number of existing plots expected to become vacant through mortality	2
4) Net number of households on yards expected to leave the area	3
5) Number of households on yards expected to move into housing in next 5 years	0
6) Residential plots planned to be built or to be brought back into use	0
Total supply	5
Additional accommodation need	
7) Needing permanent permission from temporary plots	0
8) Households on transit plots requiring residential plots in the area	0
9) Households on unauthorised encampments requiring residential plots in the area	0
10) Households on unauthorised developments requiring residential plots in the area	0
11) Households currently overcrowded (including concealed or 'doubling up' households)	33
12) Net new households expected to arrive from elsewhere (linked to Step 4)	3
13) Newly forming households	30
14) Need identified by Havering GTANA/Local Plan	5
Total need	71
Balance of need and supply	
Total additional accommodation needed	66

Need for plots 2022-23 to 2026-27: steps of the calculation

6.40 Information from local authorities and evidence from the survey used to inform the calculations included:

- the number of existing plots
- the number of households residing on unauthorised encampments requiring accommodation (and surveyed during the survey period)
- the number of unauthorised developments (during the survey period)
- the number of temporary plots
- the number of vacant plots
- the number of plots with planning permission but yet to be developed or redeveloped and occupied (referred to as potential plots)
- the number of transit plots.

6.41 The remainder of this chapter explains the calculation of accommodation need in more detail. It describes both the process and results of the calculations of Travelling

Showpeople's accommodation needs for the first five-year period. It also calculates need for the second five-year period.

Supply of plots 2022-23 to 2026-27

6.42 Supply steps (Steps 2 to 6) do not relate to Havering, as this GTANA incorporates the needs based on their 2019 GTANA and 2021 Local Plan.

Step 1: Current occupied permanent plots

6.43 This is based on information provided by councils and corroborated by visits to yards, information from the consultation with The Showmen's Guild, and surveys of households. There are currently 91 occupied plots. This includes the five plots in Havering and one in Camden.

Step 2: Number of unused residential plots available

6.44 This is based on the number of existing plots with planning permission, available but not in use (i.e., vacant). As the plots are all occupied there are zero vacant plots.

Step 3: Number of existing plots expected to become vacant through mortality

6.45 This is calculated using a mortality rate, as in conventional Housing Needs Assessments (see paragraph 4.48). Applying a mortality rate of 2.825 per cent over the first five-year period results in an additional supply of three plots. Although vacant homes arising from mortality will not necessarily be made available to Travelling Showpeople households (see paragraph 4.45), this assumption is necessary for the purposes of the assessment.

Step 4: Net number of households on yards expected to leave the area

6.46 This relates to the number of households who intend to leave the study area, resulting in their respective plot being made available for others. This was determined by survey responses. It was assumed that those currently residing on plots expecting to leave the area permanently in the next five years will do so. This results in an additional supply of three plots.

Step 5: Number of households on plots expressing a desire to live in housing, resulting in a vacant plot

6.47 This was determined by survey data. It was assumed that all those currently residing on plots planning to move into housing in the next five years or preferring to move into housing from an overcrowded plot (Step 11) will do so. The calculation excludes those intending to move out of the study area, since these households are already counted in Step 4.

6.48 Zero plots in the study area are expected from this source.

Step 6: Residential plots planned to be built or brought back into use

6.49 Plots that will be developed or brought back into use are referred to as 'potential' plots. Plots that will be developed have been granted planning permission but not yet been developed. Potential plots include those that have been partly developed; or that were previously occupied but are not so currently, and need redevelopment. The number of plots expected to be developed or brought back into use between 2022-23 and 2026-27 results in zero plots.

Need for plots 2022-23 to 2026-27

Step 7: Seeking permanent permission from temporary plots

6.50 This is determined by local authority data. It is assumed households residing on plots where planning permission expires within the first five-year period will still require accommodation within the study area. There are currently zero plots with temporary planning permission located in the study area.

Step 8: Households on transit plots requiring plots in the area

6.51 This is determined by survey data. It includes any households on transit pitches/plots or negotiated stopping sites who reported that they required permanent plots within the study area in the next five years. However, there were no households in this position. So, there is no need arising from any transit plots.

Step 9: Households on unauthorised encampments seeking residential plots in the area

6.52 Guidance (DCLG 2007) recommends considering whether households residing on unauthorised encampments require alternative accommodation. Using survey data, it has been calculated how many households on unauthorised encampments want plots in the study area. There were no households residing on unauthorised encampments identified during the survey period, so there is a need of zero plots arising from this source.

Step 10: Households on unauthorised developments seeking residential plots in the area

6.53 Households on unauthorised developments were identified through analysis of data provided by local authorities and verified by visits to the yards. There are no unauthorised plots. Hence there is a need for zero additional plots.

Step 11: Households on overcrowded plots seeking residential plots in the area

6.54 Plots are identified as overcrowded if there is insufficient space to accommodate household members; and/or the plot is unable to accommodate the number of caravans required to accommodate all household members. Plots can also be overcrowded due to 'hidden' and/or additional households living on the plot without alternative accommodation (households 'doubling-up'). This includes adult children; other types of household member; and couples in the process of divorce or separation where one of the former couple will need a separate plot, or plots. Overcrowding on Travelling Showpeople plots may also differ from that on Gypsy and Traveller plots, due to the need for equipment and vehicle storage. This generates a need for 33 plots in the study area.

Step 12: New households expected to arrive from elsewhere

6.55 In the absence of any data derivable from primary or secondary sources (beyond anecdotal evidence) on whether households residing outside London intend to move into the area, it is assumed that the inflow of households to the study area will be equivalent to the outflow (Step 4). In the absence of specific data, this assumption ensures that the model remains neutral; and avoids overestimating or underestimating the net migration effect.

6.56 Based on responses to survey questions about households with need, there are three households intending to leave the study area in the next five years. So, this step identifies a need for three additional plots to accommodate households moving into the study area.

Step 13: New household formations expected from within existing households on yards

6.57 The number of individuals expected to leave plots to create new households was estimated from survey data. This relates to the number of household members aged 16 or over, at the time of the survey, whom respondents reported will require a separate plot in the study area during the first five years of the study period. This generates a need for 30 plots in the study area.

Step 14: Need from Havering GTANA/Local Plan

6.58 As discussed in Chapter 4, and at paragraph 6.5, the GLA and the Steering Group in which boroughs there would be no new fieldwork on yards. This resulted in no fieldwork on yards being undertaken in Havering. As with the assessment of need for pitches for Gypsies and Travellers, this assessment incorporates the need for five plots, identified by Havering's GTANA and Local Plan.

6.59 As shown in Appendix 13, this results in a need for an additional five plots.

Balance of need and supply

6.60 From the steps above, the total number of additional plots needed is calculated by deducting the additional supply from the additional need.

Need for Travelling Showpeople plots 2022-23 to 2026-27

6.61 The following shows the additional accommodation need for the whole of London.

Table 6.17: Summary of accommodation needs 2022-23 to 2026-27 (plots)

Area	**Plots**
Study area total	66

Need for Travelling Showpeople plots 2027-28 to 2031-32

6.62 Considering future accommodation need, it is assumed that households with needs resulting from overcrowding, or living on unauthorised developments and encampments, will move onto yards within the first five-year period covered by the assessment. (While this might be viewed as an optimistic assumption, it is necessary for the purpose of this assessment. Any need that has not been met in the first five-year period will need to be carried over to the second five-year period. Additional supply not made available within the first five years should be removed from the supply and reinstated as part of the assessed need.) As such, only natural population increase and mortality need to be considered in calculating need for the second five-year period.

6.63 Calculating need for the second five-year period starts from the total number of plots with planning permission at the start of 2027-28 (157). This is based on the assumption that, by 2027-28, existing occupied plots will still be occupied; vacant plots will be occupied; potential plots will have been developed and occupied; and any additional need will have been met by new supply. Along with any need that has not been met, any other changes resulting in a reduction in supply, and/or any additional need not met, will need to be carried over to the second five-year period.

6.64 This assessment incorporates the identified need from Havering's GTANA and Local Plan into the first five-year period, but not the second five-year period. This is because their GTANA identifies no need for the second five-year period.

6.65 The starting point for calculating the need for the second five-year period is the number of plots (with planning permission and occupied) at the start of 2027-28, which is determined as 157 plots.

Table 6.18: Summary of steps in calculating plot supply by 2027-28:

Steps	**Plots**
Plots supply in 2022 (see Table 6.1)	91
Total need 2022-23 to 2026-27	66
2027-28 supply	157

6.66 The six boroughs identify zero accommodation need for 2027-28 to 2031-32, the London GTANA's second five-year period. A growth rate is not applied to these boroughs' supply or need figures (see Step 14), since the London GTANA uses the borough GTANA need figure for plots. The growth rate is applied to the total number of plots in London, less the supply and need identified by the six boroughs' GTANAs – i.e., 147 plots. The calculation is as follows:

Table 6.19: Summary of steps in calculating 2027-28 supply

Steps	**Plots**
Plot supply 2027-28 (Table 6.18)	157
Less the supply from the six boroughs	5
Less need identified by the six boroughs up to 2026-27	5
Total	147

6.67 Next, the calculation of predicted population growth and need for the second five-year period is made. To determine accommodation needs for 2027-28 to 2031-32, this assessment applies a population growth factor. This factor is based on an analysis of local demographics using survey responses, including current population numbers; average number of children per household; older children becoming adults; and household formation rates. This is discussed in more detail in Chapter 4.

6.68 This analysis indicates an annual household growth rate of 2.22 per cent per annum (compound), equating to a five-year rate of 14.29 per cent. A mortality rate of 2.825 per cent over each five-year period is also applied. Together, these result in a net population growth rate of 11.5 per cent (14.29 – 2.825 = 11.465). This rate (11.465 per cent) is applied to 147, which results in an additional need for 17 plots.

6.69 As there is no need for plots identified by the six boroughs for 2027-28 to 2031-32 no further need is added to this growth figure. Table 6.20 shows the accommodation need for 2027-28 to 2031-32:

Table 6.20: Summary of Showpeople accommodation needs 2027-28 to 2031-32 inclusive (plots)

Area	**Plots**
Study area total	17

Need for Travelling Showpeople plots 2022-23 to 2031-32

6.70 This chapter has provided both quantitative and qualitative data regarding key characteristics of households residing on Travelling Showpeople plots. Accommodation needs resulting from the calculations in the tables above are shown in Table 6.21 (for London) and Table 6.22 (for sub-regions). The identified need for LPAs is outlined in Table 6.23 and Appendix 13.

Table 6.21 Summary of Showpeople accommodation needs 2022-23 to 2031-32 (plots)

Period	**Need**
2022-23 to 2026-27	66
2027-28 to 2031-32	17
Total	83

Table 6.22: Travelling Showpeople's accommodation need by London sub-region 2022-23 to 2031-32 (plots)

Sub-region	**2022-23 to 2026-27**	**2027-28 to 2031-32**	**Total need 2022-23 to 2031-32**
Central London	0	0	0
East London	5	0	5
North London	0	0	0
South London	30	7	37
West London	31	10	41
Total	66	17	83

Table 6.23: Travelling Showpeople's accommodation need by Local Planning Authority 2022-23 to 2031-32 (plots)

Local Planning Authority	**2022-23 to 2026-27**	**2027-28 to 2031-32**	**Total need 2022-23 to 2031-32**
Bromley	30	7	37
Camden	0	0	0
Havering[76]	5	0	5
Hillingdon	10	3	13
Hounslow	21	7	28
Total	66	17	83

[76] Based on Havering's 2019 GTANA and 2021 Local Plan

Need for transit plot stopping arrangements

6.71 As with Gypsies and Traveller pitches, there are no authorised transit plots for Travelling Showpeople across the study area. Both household and stakeholder survey responses highlighted a need for transit provision. Some authorities have procedures and protocols in place to accommodate transit needs. As stated in paragraph 6.33, survey responses indicate that Travelling Showpeople view negotiated stopping as the most effective way to address the lack of stopping places in London (see Chapter 9).

7. Gypsies and Travellers in bricks and mortar accommodation

Summary

This chapter summarises findings from the online survey of Gypsy and Traveller households living in bricks and mortar accommodation. 23 per cent of these households completed the survey, exceeding the target response rate of 20 per cent. The findings provide a good picture of this group's characteristics; health, employment and education; current accommodation; patterns of travelling; and their current and future accommodation needs.

Analysis of survey data shows that over half of Gypsy and Traveller households in bricks and mortar accommodation live in the social rented sector. Survey respondents identified a lack of pitches near friends or family, or being closer to family or friends, as reasons for moving to their current accommodation. They also reported that some households have always lived in their accommodation. Almost two-fifths of households were either 'dissatisfied' or 'very dissatisfied' with their current accommodation. This compares to around 6.9 per cent of EHS respondents.

Households' main reasons for travelling included a lack of pitches where households could live; and reinforcing a traditional way of life. In terms of travelling patterns, just over half of survey respondents stated that, in the past 24 months, no member of their household had travelled, involving at least one overnight stop in a caravan or trailer. These travel rates were lower than before the pandemic, with households citing COVID-19 as a key reason for travelling less.

It is apparent from the survey responses that Gypsy and Traveller households living in bricks and mortar accommodation experience a wide range of health issues, with mental health being the most commonly cited.

This chapter also determines the current and future needs of Gypsy and Traveller households for bricks and mortar accommodation. Chapter 5 determines the need for pitches, including the need arising from those currently living in bricks and mortar accommodation.

Data based on survey responses show that households need 633 additional homes from 2022-23 to 2026-27 and 373 additional homes from 2027-28 to 2031-32.

Introduction

7.1 This chapter summarises findings from the online survey completed by Gypsy and Traveller households living in bricks and mortar accommodation (completed in 2023). Key topics the survey covered include respondents' characteristics; health;

employment and education; current accommodation; patterns of travelling; and current and future accommodation needs. The survey responses highlight issues such as overcrowding.

7.2 The survey responses provide a basis for understanding the current accommodation of Gypsy and Traveller households living in bricks and mortar accommodation. An understanding of current accommodation and household characteristics based on survey responses helps determine whether the household needs to move to alternative accommodation. This chapter uses data from household surveys to calculate the need for bricks and mortar accommodation during the period covered by the GTANA.

Survey response rate

7.3 When the GTANA surveys were being planned, there were an estimated 2,046 Gypsy and Traveller households living in bricks and mortar accommodation in London (see paragraph 4.29). RRR, the GLA and GTANA Steering Group agreed that a survey response rate of between 10 per cent and 20 per cent from this cohort would be acceptable. A total of 500 households completed the online surveys, equating to a response rate of 23 per cent across London. The response rate across boroughs varied between 4 per cent and 104 per cent (i.e., the number of responses was higher than the estimated sample size), with a response rate of 4 per cent or more in all boroughs (see Appendix 14). The overall response rate is sufficient to ensure that the data used for the accommodation needs analysis is robust and reliable.

Survey findings

Respondent characteristics

<u>Age and gender</u>

7.4 Survey respondents were asked their age and gender. The survey responses are specific to the respondents and do not indicate the gender and age of other household members.

7.5 In relation to gender, three-quarters (75 per cent) of survey respondents identified as female, and just over a fifth (21 per cent) as male. Small proportions preferred not to state their gender identity (1 per cent); described themselves as 'nonbinary' (1 per cent); or used another term (0.2 per cent). Nine respondents (2 per cent) did not state their gender identity (Table 7.1).

Table 7.1: Gender of respondents

Gender	Number	%
Female	373	75%
Male	105	21%
Prefer not to say	7	1%
Nonbinary	5	1%
Use another term	1	0.2%
Not stated	9	1.8%
Total	500	100%

7.6 Table 7.2 shows the age of survey respondents. Gypsy and Traveller survey respondents tend to be younger than 2021 Census HRPs (see paragraph 3.20). For example, over two-fifths (43 per cent) of Gypsy and Traveller survey respondents were aged 16 to 34, compared to a fifth (20 per cent) of all London HRPs. Also, the average age of the Gypsy and Traveller survey respondents is 36, compared with 46 for all London 2021 Census HRPs. However, only a small proportion (3 per cent) of Gypsy and Traveller survey respondents were aged 65 or over, compared with 20 per cent of all London 2021 Census HRPs (Table 7.2).

Table 7.2: Age of survey respondents

Age	Number	Survey respondents	2021 Census HRPs
16 – 24 years	58	12%	3%
25 – 34 years	154	31%	17%
35 – 49 years	173	34%	32%
50 – 64 years	71	14%	28%
65+	15	3%	20%
Not stated	29	6%	N/A
Total	500	100%	100%

Health, employment and education

7.7 The survey asked respondents about the health and mobility of household members. In relation to registration with a GP, four-fifths (81 per cent) stated that household members are registered with a GP, whilst small proportions stated that they are temporarily registered (5 per cent) or are not registered (5 per cent) (Table 7.3).

Table 7.3: Registered with GP

Registered	Number	%
Yes, permanent registration	402	81%
Yes, temporary registration	26	5%
No	26	5%
Don’t know	6	1%
Not stated	40	8%
Total	500	100%

7.8 The survey asked respondents if they, or anyone else in their household, have any health or mobility issues. (Respondents could report more than one issue). Table 7.4 shows that over a quarter (28 per cent) stated that someone in the household experiences a mental health issue. Just under a quarter (23 per cent) stated that someone experiences a long-term illness, such as diabetes; multiple sclerosis; heart conditions; epilepsy; or chronic pain. Just over a fifth (21 per cent) said that someone experiences asthma; just over a fifth (21 per cent) that their household contains an adult with a physical disability; and just under a fifth (18 per cent) that it contains someone with a learning disability. Smaller proportions of households contain a child with a physical disability (5 per cent), or someone with a visual, hearing or speech disability (4 per cent). A small proportion (7 per cent) stated that no one in their household has health or mobility issues (households may contain more than one person with a disability). In total, almost half (48 per cent) of survey respondents stated that someone in the household has a disability or a long-term illness. This compares with over a quarter (27 per cent) of households in London recorded by the Census as containing someone with a disability.

Table 7.4: Health or mobility issues

Health or mobility issue	**Number**	**%**
Mental health issue	141	28%
Long-term illness	116	23%
Asthma	107	21%
Physical disability (adult)	105	21%
A learning disability	92	18%
No health issues	37	7%
Physical disability (child)	24	5%
Visual, hearing or speech disability	18	4%

7.9 The survey asked respondents about their employment status (although not that of household members). As Table 7.5 shows, over two-fifths (43 per cent) described themselves as unemployed. This is disproportionately high when compared with people aged 16 or over in London as a whole (3 per cent) in the 2021 Census (see Table 3.9). However, it is important to note that the categories used in the London GTANA household survey and the 2021 Census differ. Additionally, the GTANA determined the employment status of survey respondents, while the 2021 Census refers to all people aged 16 or over. Therefore, the figures are not directly comparable. Just under two-fifths (39 per cent) of survey respondents described themselves as either a carer (14 per cent), employed full-time (8 per cent); a homemaker (6 per cent); employed part-time (6 per cent); retired (3 per cent), or self-employed (2 per cent). (This is lower than the London average of 16 per cent of economically active adults in London aged 16-64 being self-employed.[77]) Just under a fifth (18 per cent) did not give their employment status.

[77] ONS, Employment by Self-Employed, Full time and Part time and Gender, Borough, April 2024

Table 7.5 Employment status

Status	Number	%
Unemployed	211	43%
Carer	72	14%
Employed full-time	41	8%
Homemaker	31	6%
Employed part-time	28	6%
Retired	15	3%
Self-employed	11	2%
Other	1	>1%
Not stated	90	18%
Total	500	100%

7.10 Just under half (49 per cent) of survey respondents stated that their household contains a school-age child or children (Table 7.6). In just over half (52 per cent) of those households, all school-age children attend school, whilst in just under two-fifths, only some school-age children attend school. In only a very small proportion (1 per cent) of those households, no school-age children attend school (Table 7.7).

Table 7.6: School-age children in household

School-age children in household	Number	%
Yes	242	49%
No	202	40%
Not stated	56	11%
Total	500	100%

Table 7.7: School-age children's school attendance

Attend school	Number	%
Yes – all children	127	52%
Yes – some children	94	39%
No	2	1%
Not stated	19	8%
Total	242	100%

7.11 Survey respondents in households where some or all children do not attend school gave a wide range of reasons for this. (They could cite more than one reason.) The main reason, cited by two-fifths (40 per cent) of respondents, was bullying. This was followed by being on a waiting list, or lists, for a school place (19 per cent); and a parent being ill or disabled (18 per cent). Smaller proportions of responses included not having a school uniform (7 per cent); a lack of transport to school (5 per cent); cultural reasons (4 per cent); parents preferring children to be taught at home (3 per cent); being evicted or moved on (2 per cent); and seasonal movement – i.e., travelling during certain months (2 per cent) (Table 7.8).

Table 7.8: Reasons for school-age children not attending school

Status	Number	%
Bullying	79	40%
Waiting lists for a school place	37	19%
Parent/carer's illness or disability	34	18%
Not having school uniform	14	7%
Lack of transport	9	5%
Cultural reasons	7	4%
Prefer to be taught at home	6	3%
Evictions/being moved on	4	2%
Seasonal movement	4	2%
Total	194	100%

Current accommodation

7.12 As Table 7.9 shows, over a third (38 per cent) of survey respondents currently live in east London; and just over a fifth (21 per cent) in central London. Smaller proportions live in south London (15 per cent), north London (11 per cent), west London (11 per cent) and outside London (4 per cent).[78] The small number of survey respondents living outside London may doing so due to a lack of suitable accommodation in London, but may have links to family in London.

Table 7.9: Current location

	Number	%
East London	191	38%
Central London	106	21%
South London	77	15%
North London	54	11%
West London	54	11%
Outside London	18	4%
Total	500	100%

7.13 As Table 7.10, below, shows, over half of respondent households live in the social rented sector (52 per cent). This percentage is almost the same as that of Gypsy and Traveller households according to the 2021 Census. It compares with just under a quarter of all households in the general population who responded to the Census (see Table 3.3). Just under a third (30 per cent) rent from a private landlord. Smaller proportions stated that they own the accommodation where they live (8 per cent); live

[78] For the purposes of this GTANA, the London sub-regions are as follows:

- Central London: Camden, the City of London, Kensington and Chelsea, Islington, Lambeth, Southwark, Westminster.
- East London: Barking and Dagenham, Bexley, Greenwich, Hackney, Havering, Lewisham, Newham, Redbridge, Tower Hamlets, Waltham Forest.
- North London: Barnet, Enfield, Haringey.
- South London: Bromley, Croydon, Kingston upon Thames, Merton, Sutton, Wandsworth.
- West London: Brent, Ealing, Hammersmith and Fulham, Harrow, Richmond upon Thames, Hillingdon, Hounslow.

with family or friends (4 per cent); rent from a lettings agent (2 per cent); or live in non-self-contained temporary accommodation (2 per cent).[79]

Table 7.10: Current accommodation

Type	Number	%
Rent from local authority/housing association	265	52%
Rent from a private landlord	149	30%
Owner-occupied house/flat	39	8%
Living with family or friends	19	4%
Other	10	2%
Rent from a lettings agent	10	2%
Non-self-contained temporary accommodation	8	2%
Total	500	100%

7.14 In terms of length of residence, almost three-fifths of survey respondents (59 per cent) have lived in their current accommodation for more than five years. Around an eighth (13 per cent) have lived in their current accommodation for one to two years and just over a fifth (21 per cent) for three to five years. A small proportion (7 per cent) have lived in their accommodation for 12 months or less (Table 7.11).

Table 7.11: Time in current accommodation

Period	Number	%
Less than 1 month	2	0%
1-3 months	3	1%
4-6 months	1	0%
7-12 months	29	6%
1-2 years	66	13%
3-5 years	103	21%
More than 5 years	296	59%
Total	500	100%

7.15 The survey asked respondents how long their household intends to remain in their current accommodation. Over half (52 per cent) stated that they intend to stay for more than five years, whilst a quarter (25 per cent) intend to remain for between three and five years. Smaller proportions stated that they intend to stay in their current accommodation for between one and two years (4 per cent); or for 12 months or less (8 per cent) (Table 7.12).

[79] The category 'temporary accommodation' specified living in accommodation such as a B&B or hotel, a hostel, or a refuge. This means that respondents living in temporary accommodation within the private rented and social rented sectors are not identified by survey results as living in temporary accommodation.

Table 7.12: How long respondents plan to stay in current accommodation

Period	Number	%
Less than one month	4	1%
1-3 months	1	0%
4-6 months	19	4%
7-12 months	15	3%
1-2 years	21	4%
3-5 years	126	25%
More than 5 years	259	52%
Don’t know	52	10%
Not stated	3	1%
Total	500	100%

7.16 The survey asked respondents what type of accommodation their households lived in before their current accommodation. The largest proportions had rented from a private landlord (21 per cent) or from a local authority or housing association (21 per cent). Slightly smaller proportions were previously living with family or friends (20 per cent), or on a site managed by a local authority or housing association (17 per cent) (Table 7.13).

Table 7.13: Previous accommodation

Type	Number	%
Rent from a private landlord	103	21%
Rent from local authority/housing association	103	21%
Living with family or friends	96	20%
Council/social rented site	86	17%
Non-self-contained temporary accommodation	27	5%
Owner-occupied house/flat	22	4%
Other (please state)	19	4%
Rent from a lettings agent	17	3%
Private site	15	3%
Private site owned by self	10	2%
Not stated	2	0%
Total	500	100%

7.17 Table 7.14 shows that the largest proportion of households acquired their current accommodation through a local authority or housing association (57 per cent). Smaller proportions did so directly from a private landlord (14 per cent); through a letting agency (9 per cent); by buying the accommodation (8 per cent); or through family and friends (7 per cent).

Table 7.14: How respondents acquired their current accommodation

How acquired	Number	%
Through a local authority/housing association	283	57%
From the private landlord directly	70	14%
Through a lettings agency	47	9%
Bought the accommodation	39	8%
Through family and friends	34	7%
Responded to an advert	12	2%
Through a charity	3	1%
Other	2	0%
Not stated	10	2%
Total	500	100%

7.18 Survey respondents cited a wide range of reasons for moving to their current accommodation. Some households (18 per cent) have always lived in their current accommodation. Other reasons for moving to their current accommodation included a lack of pitches near friends or family (40 per cent); and to be closer to family or friends (19 per cent). Smaller proportions cited reasons related to employment (7 per cent), health (5 per cent), or a friendly or known landlord (4 per cent) (Table 7.15).

Table 7.15: Main reason for moving to current accommodation

Reason	Number	%
No pitches near friends or family	202	40%
To be closer to family or friends	96	19%
Always lived here	89	18%
For employment reasons	33	7%
For health reasons	27	5%
A friendly/known landlord	18	4%
Other	20	4%
Don't know	5	1%
Not stated	10	2%
Total	500	100%

7.19 The survey asked respondents why they live in a house or flat (respondents could provide more than one response). Over four-fifths (82 per cent) said this was due to a lack of sites (58 per cent); or that they have no choice (39 per cent). Just over a tenth (12 per cent) stated that they did so to live in better accommodation (Table 7.16).

Table 7.16: Reasons for living in a house or flat

Reason	Number	%
Lack of sites	288	58%
No choice	197	39%
To live in better accommodation	59	12%
Health reasons	32	6%
Educational reasons	19	4%
To live in a better area	15	3%
To access cheaper accommodation.	5	1%

7.20 Table 7.17 shows survey respondents' households' satisfaction with their current accommodation. Very few (7 per cent) were 'very satisfied' with their current accommodation, although just over a fifth (22 per cent) were 'satisfied'. This compares to 88.3 per cent of respondents to the EHS (2022-23) who were 'very' or 'fairly' satisfied with their current accommodation.[80] Just under a third (32 per cent) were 'neither satisfied nor dissatisfied'. Almost two-fifths (38 per cent) were either 'dissatisfied' (16 per cent) or 'very dissatisfied' (22 per cent) with their current accommodation. This compares with 6.9 per cent of respondents to the EHS (2022-23) who were very' or 'fairly' dissatisfied with their current accommodation.

Table 7.17: Satisfaction with current home

Satisfaction	Number	%
Very satisfied	36	7%
Satisfied	110	22%
Neither satisfied nor dissatisfied	163	33%
Dissatisfied	82	16%
Very dissatisfied	109	22%
Total	500	100%

7.21 The survey asked respondents what they like about where they live. Over a quarter (26 per cent) stated 'nothing'. Just over a fifth (22 per cent) stated that they like living with, or close to, family. Around a sixth (17 per cent) stated that they liked the local area (Table 7.18).

Table 7.18: Like about where they live

Reason	Number	%
Nothing	60	26%
Living with/near family	51	22%
Local area	40	17%
Good/close to facilities	18	7%
Landlord	17	7%
Transport links	15	6%
Local community	11	5%
Garden	10	4%
Accommodation	5	2%
Feel safe	4	2%
Other	5	2%
Total	236	100%

7.22 Similarly, survey respondents were asked what they do not like about where they live. The main factors cited were that they would prefer to live on a site and/or they do not like living in a house or flat (31 per cent); their accommodation being too far away from their family (19 per cent); and not enough space in their current accommodation (17 per cent) (Table 7.19).

[80] See MHCLG, English Housing Survey 2022 to 2023: satisfaction and complaints - fact sheet, Table FA5401: Satisfaction with accommodation

Table 7.19: Don’t like about where they live

Reason	Number	%
Would prefer site/don’t like living in a house or flat	102	31%
Too far from family	63	19%
Not enough space	55	17%
Too expensive	19	6%
Not part of culture	18	5%
Accommodation in poor condition	14	4%
No choice	12	4%
Neighbours	11	3%
Racism and/or harassment	10	3%
Nothing	9	3%
Other	15	5%
Total	328	100%

7.23 Table 7.20 shows that just under half (49 per cent) of survey respondents stated that their accommodation is not suitable for their needs, compared to over a third (35 per cent) who stated that it is suitable. Table 7.21 shows that around a sixth (16 per cent) stated that they require adaptations, such as ramps, handrails or stair lifts, to remain in their accommodation.

Table 7.20: Suitability of current accommodation

Suitable	Number	%
No	247	49%
Yes	177	35%
Don’t know	33	7%
Not stated	43	9%
Total	500	100%

Table 7.21: Require adaptations to remain in home

Adaptations required	Number	%
No	276	55%
Yes	81	16%
Don’t know	99	20%
Not stated	44	9%
Total	500	100%

Travelling

7.24 The survey asked respondents about their travelling patterns. Just over half (52 per cent) stated that no member of the household had travelled in the past 24 months, involving at least one overnight stop in a caravan or trailer. This compares with just under a quarter (24 per cent) who had (Table 7.22).

Table 7.22: Travel in last 24 months

Required	Number	%
No	260	52%
Yes	118	24%
Not stated	122	24%
Total	500	100%

7.25 Of the 118 survey respondents who stated that a member of the household had travelled during the last 24 months, two-fifths (40 per cent) stated that the COVID-19 pandemic had affected their travelling patterns, whilst just over a tenth (11 per cent) stated that it had not. Over two-fifths (46 per cent) did not state whether the pandemic had impacted their travelling patterns (Table 7.23).[81]

Table 7.23: Impact of COVID-19 on travelling patterns

Changed travelling patterns	Number	%
Yes	47	40%
No	13	11%
Don't know	4	3%
Not stated	54	46%
Total	118	100%

7.26 Survey respondents who reported that they and/or a member of their household had travelled were asked in which season or seasons, over the last 12 months, they had done so. As Table 7.24 shows, over four-fifths (86 per cent) stated that a member of the household had travelled during summer. Over a third (35 per cent) had travelled during spring; over a quarter (29 per cent) during autumn; and around a seventh (14 per cent) during winter.

Table 7.24: When travelled during last 12 months

Season	Number	%
Summer	102	86%
Spring	41	35%
Autumn	34	29%
Winter	17	14%

7.27 Survey respondents who reported travelling were asked why they and/or household members travel. (Respondents were able to state more than one reason.) Almost all (99 per cent) cited the absence of a pitch where they could live. A similarly high proportion (97 per cent) stated that they travel for cultural reasons – i.e., to reinforce cultural identity – whilst just over half (54 per cent) travel to visit family and friends. Just under half (47 per cent) stated that household members travel to visit events; over a third (37 per cent) to go on holiday; and over a fifth (21 per cent) due to work (Table 7.25).

[81] Please note that the survey question related to the responses presented in Table 7.22 asked whether households had travelled during the last 24 months, to reflect that households may have travelled less during the post-COVID period. However, subsequent survey questions, for example, the question covered in Table 7.24, asked about household travelling patterns during the last 12 months.

Table 7.25: Reason(s) for travelling

Reason	Number	%
No pitch on which to live	106	99%
Culture/heritage/way of life	114	97%
To visit friends/family	64	54%
To visit events	56	47%
To holiday	44	37%
Due to work	25	21%
Tend not to travel	13	11%

7.28 Over half (57 per cent) of respondents who reported having travelled stated that, when travelling during the last 12 months, they had been moved on from a location. with Two-fifths (40 per cent) said they had not (Table 7.26).

Table 7.26: Moved on from any location in the past year?

Moved on	Number	%
Yes	68	57%
No	47	40%
Not stated	3	3%
Total	118	100%

7.29 All survey respondents were asked whether they or members of their household would permanently stop travelling in the next five years. Over a quarter (26 per cent) stated that they had already stopped travelling, whilst a fifth (20 per cent) stated that they did not know. Smaller proportions stated that they intend to permanently stop travelling (9 per cent), or that they do not intend to do so (8 per cent) (Table 7.27).

Table 7.27: Permanently stop travelling in the next five years?

Stop travelling	Number	%
Have already stopped	131	26%
Don’t know	100	20%
Yes	45	9%
No	41	8%
Prefer not to say	33	7%
Total	500	100%

7.30 Of the 45 respondents who stated that they or members of their household will stop travelling in the next five years, around an eighth (13 per cent) stated that they will do so within the next 12 months; and a fifth (20 per cent) within one to two years. None stated that they would stop travelling within the next three to five years. Just over two-thirds (67 per cent) stated that they do not know when they will stop travelling (Table 7.28).

Table 7.28: When permanently stop travelling

Period	Number	%
Within the next 12 months	6	13%
In 1-2 years	9	20%
In 3-5 years	0	0%
Don't know	30	67%
Total	45	100%

7.31 The main reasons for stopping travelling included concerns about safety or harassment (31 per cent); intending to settle (31 per cent); employment (27 per cent); a lack of transit sites (27 per cent); health and/or support need (24 per cent); and the threat of evictions (20 per cent) (Table 7.29).

Table 7.29: Reasons for stopping travelling

Reason	Number	%
Safety/harassment	14	31%
Settled	14	31%
Employment	12	27%
Lack of transit sites	12	27%
Health and/or support needs	11	24%
Threat of evictions	9	20%
Education/access to schools	5	11%
Restrictions on travelling	5	11%
Age/too old	1	2%

7.32 Those who reported that they, or a member/members of their household, travelled were asked what issues were experienced whilst travelling. Over half (51 per cent) stated that there are too few places to stop when travelling. Over a third reported each of the following issues: abuse or harassment whilst travelling (36 per cent); a lack of toilet (36 per cent) or water (36 per cent) facilities; and problems with rubbish collection (36 per cent); Respondents also stated that the behaviour of the police (36 per cent) and of local authority officers (33 per cent) can cause problems when travelling. A fifth (20 per cent) of respondents stated that the behaviour of other Travellers can cause problems when travelling (Table 7.30).

Table 7.30: Problems while travelling

Problem	Number	%
Closing of stopping places	23	51%
Abuse or harassment	16	36%
Lack of toilet facilities	16	36%
No water facilities	16	36%
Problems with rubbish collection	16	36%
Police behaviour	16	36%
Local authority officer behaviour	15	33%
Behaviour of other Travellers	9	20%

Accommodation needs

7.33 A key aim of the survey of Gypsies and Travellers living in bricks and mortar accommodation is to determine these households' accommodation needs; and seek their views on what accommodation their community needs. The survey asked respondents whether more permanent sites are required in their local area. As Table 7.31 shows, almost four-fifths (78 per cent) stated that there is a need for more permanent sites, with only a small proportion (1 per cent) stating that there is no need.

Table 7.31: More permanent sites are required in the local area

Response	Number	%
Yes	389	78%
No	4	1%
Don't know	26	5%
Not stated	81	16%
Total	500	100%

7.34 Similarly, survey respondents were asked if there is a need for more transit or emergency provision in their local area. Just under three-quarters (73 per cent) of respondents stated that there is a need, with only a small proportion (1 per cent) stating that there is no need (Table 7.32).

Table 7.32: More transit sites are required in the local area

Response	Number	%
Yes	367	73%
No	3	1%
Don't know	43	9%
Not stated	87	17%
Total	500	100%

7.35 The survey asked respondents whether they thought local authorities should offer Gypsies and Travellers places to stop on a temporary/negotiated basis. The term 'negotiated stopping' is used to describe agreed short-term provision for Gypsies and Travellers in transit (see Chapter 9 and Appendix 12). Four-fifths (80 per cent) of respondents stated that they support this approach, with none stating that they do not (Table 7.33).

Table 7.33: Support negotiated stopping policy

Response	Number	%
Yes	399	80%
No	0	0%
Don't know	5	1%
Not stated	96	19%
Total	500	100%

7.36 Survey respondents were asked if they would like to develop or expand a site for their family's own use. Almost two-fifths (39 per cent) stated that they would like to develop a site, whilst a quarter (25 per cent) stated that they would not. Smaller proportions of respondents stated they would like to expand an existing site (5 per cent) or are in the process of applying for planning permission to develop a site (1 per cent). One survey respondent (0.2 per cent) is already in the process of developing a site (Table 7.34).

Table 7.34: Like to develop/expand site for family's own use

Response	Number	%
Yes, develop	194	38.8%
No	124	25%
Yes, expand	27	5%
Applying for permission	4	1%
Already developing a site	1	0.2%
Not stated	150	30%
Total	500	100%

7.37 Of the 226 respondents who stated that they would like to develop or expand a-site, a small proportion (3 per cent) stated that they could afford to do so (Table 7.35).

Table 7.35: Financially able to develop/expand a site

Response	Number	%
No	189	84%
Not stated	19	8%
Yes	7	3%
Prefer not to say	6	3%
Don't know	5	2%
Total	226	100%

7.38 The survey asked whether respondents' households need to move to a different home in the next five years. Just under a third (32 per cent) stated that this was the case (Table 7.36).[82]

Table 7.36: Need to move in the next five years

Response	Number	%
Yes	160	32%
No	90	18%
Don't know	118	24%
Not stated	132	26%
Total	500	100%

[82] Please note that 'need' is used to mean households who both need to move, for example, due to overcrowding, and those who were likely to move, for example, because they would prefer to live in a different area. It is important to note that not all households who indicated a need to move in response to this question were classified as having a legitimate accommodation need for the purposes of this assessment (refer to paragraph 4.36 for more details).

7.39 As Table 7.37 below shows, almost half (48 per cent) of respondents stated that their household needs to move because they would prefer to live on a site. Other reasons for needing to move, all cited by 10 per cent or more of respondents, included insufficient space in their current home to accommodate household members (38 per cent); because the household is suffering from harassment (23 per cent); the cost of living in their current accommodation (22 per cent); health or disability-related needs (15 per cent); or the household needing accommodation that is easier to manage (10 per cent).

Table 7.37: Reasons for needing to move

Reasons	**Number**	**%**
Prefer a site	77	48%
Not enough space	61	38%
Suffering harassment	36	23%
Cost of living in accommodation	35	22%
Due to health or disability needs	24	15%
Somewhere easier to manage	16	10%
To receive support/care	12	8%
Too far from friends and family	10	6%
Environment/pollution	5	3%
Employment reasons	4	3%
Old age	4	3%
Ready to move on	4	3%

7.40 In terms of the preferred tenure of households who need to move in the next five years, over two-fifths (44 per cent) stated that they would prefer to live on a social rented site, whilst just under a quarter (24 per cent) would prefer to live on site owned by their household, and just under a fifth (19 per cent) in a social rented house or flat (Table 7.38).

Table 7.38: Preferred tenure

Tenure	**Number**	**%**
Council/social rented site	71	44%
Private site owned by self	38	24%
House/flat rented from a local authority/housing association	30	19%
Private rented site	9	5%
Other	4	2%
Not stated	9	6%
Total	160	100%

7.41 Table 7.39 shows the London sub-region in which households needing or wanting to move were living when they completed the survey ('original location' column), and in which sub-region they would prefer to reside ('preferred location' column). For example, over a third (35 per cent) of survey respondents wanting or needing to move were located in east London when they completed the survey; and almost a quarter (23 per cent) of households would prefer to live in east London. However, a small proportion stated they would like to live anywhere in London (9 per cent). Over two-thirds (71 per cent) wanting or needing to move would prefer to stay in their current area.

Table 7.39: Preferred area

Sub-region	Original location		Preferred location		Stay in current location	
	No.	%	No.	%	No.	%
East London	56	35%	36	22%	42	75%
South London	28	18%	32	20%	21	75%
Central London	21	13%	21	13%	17	81%
West London	25	16%	20	12%	18	72%
North London	28	18%	18	11%	16	57%
Anywhere in London	N/A	N/A	14	9%	N/A	N/A
Other	0	0%	9	6%	N/A	N/A
Not stated	0	0%	9	6%	N/A	N/A
Outside London	2	1%	1	1%	N/A	N/A
Total	160	100%	160	100%	114	71%

Household members' future accommodation needs

7.42 Survey respondents were asked whether any person currently living with them – for example, a child or parent – would require separate accommodation within the next five years (Table 7.40). Seventeen per cent of respondent households (86 of 500) reported at least one household member who will need a separate home within the next five years. Across those households, respondents identified 170 individual household members who will require separate homes over that period. It is important to note that, where this information is used in the accommodation needs calculations below (see paragraphs 7.49 to 7.71), it is filtered to ensure that the calculations reflect need, rather than preference or demand. For example, only young people aged 16 or older at the time of the survey are deemed to be an of age to require separate accommodation by the end of the first five-year period.

Table 7.40: One or more members of household need to move in the next five years

Need to move	Number	%
Yes	86	17%
No	202	41%
Don't know	106	21%
Not stated	106	21%
Total	500	100%

7.43 Over a quarter (28 per cent) of survey respondents stated that members of their household who need separate accommodation need to move immediately, with just over a quarter (26 per cent) needing to move within a year. Around an eighth (12 per cent) stated that household members who will need separate accommodation will do so within one to two years. The largest proportion (30 per cent) stated that household members who need separate accommodation will need to move within three to five years. A small proportion (4 per cent) stated that they do not know when household members will need to move (Table 7.41).

Table 7.41: When homes will be needed

When	Number	%
Now	47	28%
Within a year	44	26%
Within 1-2 years	21	12%
Within 3-5 years	51	30%
Don't know	7	4%
Total	170	100%

7.44 Survey responses indicate that almost four-fifths (77 per cent) of household members requiring separate accommodation would like to live on a pitch, whilst just under a fifth (19 per cent) would like to live in bricks and mortar accommodation (Table 7.42).

Table 7.42: Type of accommodation would like to move to

Accommodation type	Number	%
Pitch on a site	132	77%
Bricks and mortar accommodation	32	19%
Not stated	6	4%
Total	170	100%

7.45 Just under half (48 per cent) of household members requiring separate accommodation would prefer to live on a social rented site, with a fifth (20 per cent) preferring to live on a private site they owned. Around an eighth (13 per cent) would prefer to live in a bricks and mortar accommodation they own, and just under a tenth (9 per cent) on a private site owned by a Gypsy or Traveller. Smaller proportions would prefer to move into a social rented accommodation (5 per cent) or rent from a private landlord (1 per cent) (Table 7.43).

Table 7.43: Tenure of accommodation preferred

Tenure	Number	%
Social rented site	83	48%
Private site owned by self	34	20%
Owner-occupied accommodation	22	13%
Private site	15	9%
Rent from local authority/housing association	9	5%
Rent from a private landlord	1	1%
Not sure	6	4%
Total	170	100%

7.46 The survey asked respondents where household members requiring separate accommodation would prefer to live. Similar to households needing to move (see Table 7.39), over four-fifths (81 per cent) wanting or requiring separate accommodation would prefer to stay in their current area (Table 7.44).

Table 7.44: Preferred area

Sub-region	Original location		Preferred location		Stay in current location	
	No.	%	No.	%	No.	%
East London	58	34%	55	32%	51	88%
South London	30	18%	26	15%	28	93%
West London	32	19%	25	15%	25	78%
North London	33	19%	24	14%	21	64%
Central London	13	8%	15	9%	13	100%
Anywhere in London	0	0%	11	7%	N/A	N/A
Outside London	4	2%	10	6%	N/A	N/A
Not stated	0	0%	4	2%	N/A	N/A
Other	0	0%	0	0%	N/A	N/A
Total	170	100%	170	100%	138	81%

7.47 Finally, survey respondents were asked whether they were aware of or had completed the 2021 Census. As shown in Table 7.45 below, only around a quarter (26 per cent) of household survey respondents were aware of and completed the 2021 Census.

7.48 As noted in paragraphs 3.14 to 3.16, this suggests that the 2021 Census may underestimate the number of Gypsy and Traveller households residing in London.

Table 7.45: Awareness and completion of 2021 Census

Completed	Number	%
No	215	43%
Yes, and we completed it	130	26%
Yes, but we did not complete it	44	9%
Not stated	111	22%
Total	500	100%

Calculation of accommodation need[83]

7.49 The need for bricks and mortar accommodation for Gypsies and Travellers is calculated based on the model suggested in DCLG (2007) guidance (see Chapter 4 paragraphs 4.35 to 4.36). It determines accommodation need for 2022-23 to 2031-32 in two five-year periods. Please note that this chapter calculates the need for bricks and mortar accommodation. Gypsy and Traveller households' need for pitches, including need arising from those currently living in bricks and mortar accommodation, is calculated in Chapter 5. The remainder of this chapter describes the steps involved in the calculations and sets out the needs figures.

[83] Please note that, due to rounding, column totals may differ slightly from row totals.

Need for bricks and mortar homes for Gypsy and Traveller households 2022-23 to 2026-27

7.50 Responses to the surveys determine the proportion of households who want or need to move – for example, due to overcrowding and the accommodation needs of newly forming households. It is important to note that the calculations determine accommodation need – households may desire different accommodation for reasons that the assessment does not consider as constituting need. Examples include wanting to move closer to amenities; seeking a more affordable living situation; desiring a home that is easier to manage; and needing to relocate for work. Such preferences and demands, while valid, do not form part of the accommodation need that the GTANA calculates.

7.51 Table 7.46 below summarises the results of the accommodation needs calculations for the first five-year period (please see paragraphs 4.44 to 4.46 for an explanation of the methodology.)

7.52 The need for additional accommodation in the study area mainly derives from households needing to move – including those in overcrowded homes needing to move, and newly forming households.

Table 7.46: Estimate of the need for homes for Gypsies and Travellers 2022-23 to 2026-27

1) Current homes occupied by Gypsy and Traveller households	2005
Additional accommodation supply	
2) Number of existing dwellings expected to become vacant through mortality	60
3) Dwellings vacated by those with a cultural preference for living on sites	381
4) Number of households in housing expected to move out of London	0
5) Dwellings vacated by movement within the stock	640
Total additional supply	1,081
Additional accommodation need	
6) Households in housing without a cultural preference for living on sites seeking to move	640
7) Households on unauthorised pitches seeking housing in the area	0
8) Households in overcrowded housing without a cultural preference for living on sites	325
9) Newly forming households	675
10) Households moving into housing from sites	73
Total need	1,713
Balance of need and supply	
Total additional housing needed	633

Supply of homes 2022-23 to 2026-27

7.53 Supply steps (Steps 1 to 5) determine the number of homes currently occupied by Gypsy and Traveller households; and the number of additional homes expected to become available during the first five-year period.

Step 1: Current homes occupied by Gypsy and Traveller households

7.54 This is based on 2021 Census data.

7.55 According to the 2021 Census, 2,537 Gypsy and Traveller households live in London. Data from boroughs, confirmed through site visits, shows there are 835 pitches across London, comprising 765 authorised pitches (see Table 5.1); 67 pitches on unauthorised developments; and three pitches with temporary planning permission (see Table 5.2).

7.56 To estimate the number of Gypsy and Traveller households living in bricks and mortar accommodation, the number of occupied pitches is subtracted from the number of Gypsy and Traveller households identified by the 2021 Census. Eight vacant pitches (those unoccupied at the time of the household survey) and 37 potential pitches (those with planning permission but not yet developed) are excluded, as they are not occupied. This reduces the number of pitches the calculation considers from 835 to 790.

7.57 An adjustment is made for boroughs where: the number of occupied pitches exceeds the total number of households identified in the 2021 Census, which would result in a negative figure if subtracted; or the calculation would result in fewer households than the number of households the Census records who live in flats and maisonettes (see Chapter 4).

7.58 After these amendments the above calculations result in an estimated 2,005 households living in bricks and mortar homes.

Step 2: Number of dwellings expected to become available through mortality

7.59 This is calculated using a mortality rate, as applied in conventional Housing Needs Assessments. However, the figures for mortality have been increased in accordance with studies of Gypsy and Traveller communities, which suggest a life expectancy approximately 10 years lower than that of the general population (see paragraph 4.48).[84] Applying a mortality rate of 2.825 per cent over the five-year period results in an additional supply of 60 homes. Although vacant homes arising from mortality will not necessarily be made available to Gypsy and Traveller households (see paragraph 4.45), this assumption is necessary for the purposes of the assessment.

[84] For example, L. Crout, Traveller health care project: Facilitating access to the NHS, Walsall Health Authority, 1987.

Step 3: Dwellings vacated by those who need to move and have a cultural preference to live on a pitch

7.60 Households were identified as having a cultural preference for living on a pitch if they gave the responses specified below to all of the following survey questions:

- A6: Why do you live in a house/flat rather than a caravan? (Response categories: 'due to a lack of sites', 'no choice' or both – 411 survey respondents or 82 per cent.) (See Table 7.16.) This question is important as it determines the proportion of households who prefer to reside on a site but are unable to do so.

- E6: 'Do you need to move to a different home within the next 5 years?' (Response category: 'yes' –160 or 32 per cent.) (See Table 7.36.) This question is central to determining households' need to move within the first five-year period covered by the GTANA.

- E8: What type of accommodation would you most prefer to move to? (Response categories: 'council/social rented site', 'private site owned by self', or 'private rented site' – 118 or 24 per cent.) (See Table 7.38.)

7.61 A total of 97 households responded to all three questions (A6, E6 and E8) in the response categories described above (19 per cent of survey respondents). This leads to the finding that 19 per cent of households display a cultural preference for living on pitches. Given that 2,005 Gypsy and Traveller households are estimated to be living in bricks and mortar homes in London, this results in an additional supply of 381 homes, which corresponds to an equivalent need for 381 pitches (see Chapter 5, Step 15).

Step 4: Number of households in housing expected to move out of London

7.62 This was calculated by analysing responses to the online bricks and mortar accommodation needs survey. No households stated that they intend to move out of London in the next five years.

Step 5: Dwellings vacated by movement within the stock

7.63 This derives from households moving to another bricks and mortar home in order to meet their accommodation needs. This results in 640 homes becoming vacant and contributing towards additional supply. (Homes vacated by household movement will not necessarily be made available to Gypsy and Traveller households (see paragraph 4.45). However, this assumption is necessary for the purposes of the assessment.)

Need for homes 2022-23 to 2026-27

Step 6: Households in housing without a cultural preference for living on sites seeking to move

7.64 This was calculated using the same analysis of survey responses as outlined in Step 5. This step determines the accommodation needs of households who need to move to alternative accommodation who do not display a cultural preference for living on sites (and so do not require accommodation on a site). This results in a need for 640 homes.

Step 7: Households on unauthorised pitches seeking housing in the area

7.65 Guidance (DCLG 2007) indicates that needs assessments should consider whether households living on unauthorised encampments require alternative accommodation. Using site survey data, it has been calculated how many households living on unauthorised encampments during the survey period needed bricks and mortar accommodation. Please note that only Gypsies and Travellers requiring permanent accommodation have been included in this calculation. It was determined that no Gypsy and Traveller households living on unauthorised encampments require bricks and mortar accommodation.

Step 8: Households in overcrowded housing without a cultural preference for living on a site

7.66 The need for additional accommodation deriving from overcrowding was calculated by comparing the number, sex, age and relationship of household members with the 'bedroom standard' (see Appendix 9). For example, a separate bedroom is allocated to each of the following: married or cohabiting couple; adult aged 21 or over; pair of adolescents aged 10-20, of the same sex; and pair of children aged under 10, regardless of sex. The standard is then compared with the actual number of bedrooms (including bedsitters) available for the sole use of the household. Bedrooms not actually in use are counted unless they are uninhabitable. Analysis of survey data indicates that there is a need for 325 homes derived from overcrowding. Households whose overcrowding will be resolved by newly forming households moving out are excluded from step 8 to avoid double-counting, but kept in step 9 below. It should be noted that some households experiencing overcrowding may entirely relocate, resulting in vacant properties, while in other instances, only some household members may move. However, it is not possible to determine which households will take either course of action.

Step 9: New household formations expected from within existing households

7.67 The number of individuals expected to leave bricks and mortar homes to create new households was estimated from survey data. This relates to the number of household members aged 16 or over at the time of the survey whom respondents reported would require separate accommodation over the first five-year period. This resulted in a need for 675 additional homes.

Step 10: Households moving into housing from sites

7.68 This is determined by analysis of the site survey data; and establishes the number of households currently living on pitches who require bricks and mortar accommodation. This resulted in a need for an additional 73 homes.

Balance of need and supply

7.69 From the accommodation calculation steps outlined above, the total number of homes required is calculated by deducting the additional supply from the additional need. In other words: a total need of 1,713 additional homes, minus an additional supply of 1,081 homes, resulting in a net need of 633 additional homes. Any accommodation need not met during the first five-year period (i.e., 2022-23 to 2026-27) will need to be carried forward to the second five-year period (i.e., 2027-28 to 2031-32).

Need for bricks and mortar homes 2027-28 to 2031-32

7.70 Considering accommodation need in the second five-year period, this assessment assumes that the accommodation needs of households identified above will be met during the first five-year period. (While this might be viewed as an optimistic assumption, it is necessary for the purpose of this assessment. Any need that has not been met in the first five-year period will need to be carried over to the second five-year period. Additional supply not made available for need within the first five years should be removed from the supply and reinstated as part of the assessed need, and carried over. As such, only natural population increase and mortality need to be considered when calculating accommodation need for the second five-year period (see paragraph 4.47).

7.71 Analysis of the current population of Gypsies and Travellers living in bricks and mortar accommodation indicates an annual household growth rate of 3.19 per cent per annum (compound), equating to a five-year rate of 17 per cent. This is based on an analysis of various factors derived from the household surveys, including current population numbers; the average number of children per household; and rates of partnership formation. A mortality rate of 2.825 per cent applied over the five-year period leads to a net population growth rate of 14.175 per cent (17 – 2.825 = 14.175). The net growth rate of 14.175 per cent is applied to the number of Gypsy and Traveller households living in bricks and mortar homes at the beginning of the second five-year period. This results in an estimated number of households in need at the end of the second five-year period. It leads to a need for 373 additional homes during the second five-year period.

Conclusion

7.72 This chapter provides both quantitative and qualitative data regarding key characteristics of respondent Gypsy and Traveller households living in bricks and mortar accommodation. Accommodation needs for bricks and mortar homes resulting from the calculations for London, sub-regions and local planning authorities are set out in Tables 7.47, 7.48 and 7.49 below. (The need for pitches on sites arising from Gypsy and Traveller households living in bricks and mortar homes is discussed in Chapter 5.)

7.73 Please note that OPDC's accommodation needs were determined by apportioning needs according to the proportion of Gypsy and Traveller households living bricks and mortar in each of the three boroughs, who also live within the OPDC area.[85] For example, 18 per cent of Gypsy and Traveller households in bricks and mortar accommodation in Ealing, live in the part of Ealing covered by the OPDC. So, 18 per cent of need arising from this cohort in Ealing is apportioned to the OPDC.

Table 7.47: Accommodation needs of Gypsies and Travellers living in bricks and mortar homes and households on sites seeking bricks and mortar homes (London)

Period	**Need**
2022-23 to 2026-27	633
2027-28 to 2031-32	373
Total	1,006

Table 7.48: Accommodation needs of Gypsies and Travellers living in bricks and mortar homes and households on sites seeking bricks and mortar homes (London sub-region)[86]

Sub-region	**2022-23 to 2026-27**	**2027-28 to 2031-32**	**Total need 2022-23 to 2031-32**
Central London	72	42	114
East London	247	139	386
North London	85	49	134
South London	96	59	155
West London	143	84	227
Total	633	373	1,006

[85] The OPDC area is situated within the London boroughs of Hammersmith and Fulham, Brent, and Ealing.

[86] For the purposes of this GTANA, the London sub-regions are as follows:

- Central London: Camden, the City of London, Kensington and Chelsea, Islington, Lambeth, Southwark, Westminster.
- East London: Barking and Dagenham, Bexley, Greenwich, Hackney, Havering, Lewisham, Newham, Redbridge, Tower Hamlets, Waltham Forest.
- North London: Barnet, Enfield, Haringey.
- South London: Bromley, Croydon, Kingston upon Thames, Merton, Sutton, Wandsworth.
- West London: Brent, Ealing, Hammersmith and Fulham, Harrow, Richmond upon Thames, Hillingdon, Hounslow.

Table 7.49: Accommodation needs of Gypsies and Travellers living in bricks and mortar accommodation and households on sites seeking bricks and mortar accommodation homes by Local Planning Authority

Local Planning Authority	**2022-23 to 2026-27**	**2027-28 to 2031-32**	**Total need 2022-23 to 2031-32**
Barking and Dagenham	16	9	25
Barnet	24	14	38
Bexley	55	32	87
Brent	17	10	27
Bromley	40	24	64
Camden	14	8	22
City of London	0	0	0
Croydon	18	11	29
Ealing*	15	10	25
Enfield	37	22	59
Greenwich	29	18	47
Hackney	24	13	37
Hammersmith and Fulham	15	8	23
Haringey	23	14	37
Harrow	17	10	27
Havering	23	14	37
Hillingdon	45	28	73
Hounslow	21	12	33
Islington	17	9	26
Kensington and Chelsea	6	3	9
Kingston upon Thames	8	5	13
Lambeth	12	7	19
Lewisham	17	11	28
Merton	16	9	25
Newham	31	18	49
OPDC	4	2	6
Redbridge	16	9	25
Richmond upon Thames	7	4	11
Southwark	17	10	27
Sutton	6	3	9
Tower Hamlets	11	7	18
Waltham Forest	16	9	25
Wandsworth	9	6	15
Westminster	7	5	12
Total	633	373	1,006

8. Roma community

Summary

This chapter summarises findings from the online survey of Roma households. Key topics include the characteristics of respondents; health and employment; access to services and affordability of living costs; respondents' current accommodation, including their attitudes towards it; and their current and future accommodation needs. The current and future accommodation need of Roma households in London are also calculated in this chapter.

Roma households completed a total of 729 online surveys, equating to a response rate of 10 per cent across London. The response rate in individual boroughs varied between one per cent and 52 per cent, with a response rate of 10 per cent or more in around three-fifths of boroughs.

The survey responses paint a picture of the type of accommodation in which members of the Roma community currently live, with key issues cited such as poor-quality housing and overcrowding.

Analysis of survey data shows that almost three-quarters of survey respondents had lived in the UK for more than five years, with the remainder having lived in the UK for five years or less. Roma households in London predominantly live in the private rented sector. However, around a seventh of survey respondent households currently live with family or friends, although it is not known whether this is by choice or due to the lack of alternative accommodation.

Roma survey respondents were more likely than Roma 2021 Census respondents to state that they had a health or disability issue. They were also more likely to be unemployed.

It is evident from survey responses that, while Roma households are usually able to access services such as health and education, they face significant barriers to accessing help and advice services. Few Roma households were fully aware of their eligibility for social housing, and their rights in relation to dealing with harassment and eviction processes.

This chapter also determines the current and future accommodation needs of Roma households in London. The understanding of current accommodation and household characteristics that survey findings provide helps form the basis for these calculations.

Analysis of data based on survey responses shows that 5,129 additional bricks and mortar homes are needed from 2022-23 to 2026-27 and 2,033 additional homes from 2027-28 to 2031-32.

Introduction

8.1 This chapter summarises the findings from the online survey of Roma households (completed in 2023). Key topics include the characteristics of respondents; health and employment; access to and awareness of services; affordability of living costs; households' current accommodation, including their attitudes towards it; and their current and future accommodation needs. An understanding of current accommodation and household characteristics, based on survey responses, helps determine the current and future accommodation needs of Roma households. These are also calculated in this chapter.

Survey response rate

8.2 As stated in Chapter 3 (paragraphs 3.43 to 3.47), preparations for the survey of Roma households estimated there are 7,248 Roma households living in London. RRR, the GLA and the Steering Group agreed that a survey response rate of between 10 per cent and 20 per cent would be acceptable. RRR secured 729 responses to the online survey, equating to a response rate of 10 per cent across London. The response rate in individual boroughs varied between 1 per cent and 52 per cent, with a response rate of 10 per cent or more in around three-fifths of boroughs (see Appendix 15).

8.3 While a low response rate can present challenges, it doesn't necessarily mean that the survey results are invalid or unrepresentative. Even with a low response rate, the absolute number of respondents can still be large enough to provide meaningful insights. The overall sample size of 10 per cent is sufficient to ensure that the accommodation needs analysis is based on robust and reliable data.

Survey findings

Respondent characteristics

8.4 Understanding respondent characteristics is important, as it helps determine the extent and type of accommodation households require. Understanding these characteristics allows planners and policymakers to tailor housing solutions to meet the diverse needs of the Roma community effectively.

Age and gender

8.5 Regarding gender, just over half (51 per cent) of Roma household survey respondents identify as male, and two-fifths (40 per cent) as female. This compares with over half (56 per cent) of Roma 2021 Census HRPs who identify as male and over four-fifths (44 per cent) who identify as female. It also compares with similar proportions of 2021 Census HRPs (a person who serves as a reference point, mainly based on economic activity, to characterise a whole household), of whom 55 per cent identify as male and 45 per cent as female. Just under a tenth of Roma household survey respondents (9 per cent) did not state their gender identity. One stated that they preferred to use another term, whilst one preferred not to say (Table 8.1).[87]

Table 8.1: Gender of survey respondent

Gender	Number	%	2021 Census Roma HRPs	2021 Census HRPs
Male	375	51%	56%	55%
Female	287	40%	44%	45%
Not stated	65	9%	N/A	N/A
Use another term	1	0%	N/A	N/A
Prefer not to say	1	0%	N/A	N/A
Total	729	100%	100%	100%

8.6 As Table 8.2 shows, Roma survey respondents and Roma Census 2021 HRPs tend to be younger, compared with all London 2021 Census HRPs. A third (33 per cent) of Roma survey respondents and over two-fifths (43 per cent) of Roma Census 2021 HRPs were aged 16 to 34, compared to a fifth (20 per cent) of all London HRPs. The average age of Roma survey respondents is 33; this is compared with 38 for Roma Census 2021 HRPs, and 46 for all London 2021 Census HRPs. Three-quarters of Roma survey respondents (75 per cent) were aged between 25 and 64. Of those, around a fifth are aged 25 to 34 (23 per cent); just under two-fifths 35 to 49 (37 per cent); and around a sixth 50 to 64 (15 per cent). A tenth (10 per cent) were aged 16 to 24, whilst a small proportion (2 per cent) were aged 65 to 79 (Table 8.2).

8.7 There were other differences between the age of online Roma survey respondents and Roma 2021 Census HRPs. Just under a quarter (23 per cent) of online survey respondents were aged between 25 and 34, compared with just under two-fifths (37 per cent) of Roma 2021 Census HRPs. However, the proportions of Roma online survey respondents (37 per cent) and 2021 Census (41 per cent) HRPs aged 35 to 49 are broadly similar.

Table 8.2: Age of survey respondent

Age	Survey respondents number	Survey respondents %	2021 Census Roma HRPs	2021 Census HRPs
16 to 24	70	10%	6%	3%
25 to 34	169	23%	37%	17%
35 to 49	267	37%	41%	32%
50 to 64	108	15%	13%	28%
65 to79	16	2%	3%	20%
Not stated	99	13%	N/A	N/A
Total	729	100%	100%	100%

[87] Note that the 2021 Census reports sex by ethnic identity using only the categories ‘male’ and ‘female’, whereas the GTANA survey offered a broader range of options, as shown in Table 8.1.

Country of origin and length of residence in the UK and London

8.8 The largest proportion (63 per cent) of survey respondents originate from Romania. The next largest proportions originate from Bulgaria (19 per cent) and Poland (12 per cent) (Table 8.3).

Table 8.3: Country of origin

Country	**Number**	**%**
Romania	458	62%
Bulgaria	138	19%
Poland	87	12%
Other	27	4%
Not stated	19	3%
Total	729	100%

8.9 Almost three-quarters (74 per cent) of survey respondents had lived in the UK for more than five years, with around a fifth (22 per cent) having done so for five years or less. Only a small proportion (3 per cent) had resided in the UK for less than one year. Similarly, over two-thirds (68 per cent) had lived in London for more than five years, with over a quarter (28 per cent) having done so for five years or less. Just under a fifth (19 per cent) had lived in London for between three and five years, whilst around a twentieth (4 per cent) stated that the question was not applicable or did not respond (Table 8.4).

Table 8.4: Length of residence in the UK and in London

	UK		**London**	
	No.	%	No.	%
1-3 months	2	3%	1	0%
4-6 months	7	0%	6	1%
7-12 months	18	15%	13	2%
1-2 years	24	1%	44	6%
3-5 years	112	3%	140	19%
More than 5 years	540	74%	496	68%
Not applicable	5	1%	7	1%
Not stated	21	3%	21	3%
Total	729	100%	729	100%

Awareness and completion of the 2021 Census

8.10 Survey respondents were asked whether they were aware of, or had completed, the 2021 Census. As shown in Table 8.5 below, around a quarter (26 per cent) of Roma household survey respondents were aware of the 2021 Census and completed it. As suggested in paragraph 3.17, the 2021 Census may underestimate the number of Roma households residing in London.

Table 8.5: Awareness and completion of the 2021 Census

Completed	Number	%
No	406	56%
Yes, and we completed it	187	26%
Yes, but we did not complete it	105	14%
Not stated	31	4%
Total	729	100%

Health and employment

8.11 Survey respondents were asked about their own and other household members' health and mobility. In relation to registration with a GP, just under three-quarters (74 per cent) are permanently registered, whilst a small proportion (8 per cent) are temporarily registered. Just over a tenth (11 per cent) stated that household members are not registered with a GP (Table 8.6). This suggests that just under a quarter (23 per cent) of respondents' household members may have difficulty accessing health services.

Table 8.6: Registered with GP

Registered	Number	%
Yes, permanent registration	558	77%
No	79	11%
Yes, temporary registration	60	8%
Not stated	22	3%
Don't know	10	1%
Total	729	100%

8.12 Over two-thirds (69 per cent) of survey respondents usually access health services through the NHS, whilst around a seventh (14 per cent) travel to their country of origin, and a tenth (10 per cent) do so through accident and emergency services. A small proportion (1 per cent) access health care through private health services (Table 8.7).

Table 8.7: Usual way of accessing health services

How access	Number	%
NHS/GP	503	69%
Travel to country of origin	105	14%
Through A&E	76	10%
Not applicable	15	3%
Private health services	9	1%
Other	2	0%
Not stated	19	3%
Total	729	100%

8.13 Survey respondents were asked if they, or anyone else in their household, have any health or mobility issues. (Respondents could report more than one issue.) Just under half (47 per cent) stated that no one in their household had health or mobility issues. (By comparison, over nine-tenths (91 per cent) of Roma 2021 Census HRPs and almost four-fifths (79 per cent) of London 2021 Census HRPs described their health as ‘very good or good’ – see Table 3.6.)

8.14 In a tenth (10 per cent) of households, someone experiences long-term illness, such as diabetes, multiple sclerosis, heart conditions, epilepsy, or chronic pain. In a tenth (10 per cent) of households, someone experiences asthma. Smaller proportions of households contain someone with a health or mobility issue due to old age (6 per cent); a visual, hearing or speech disability (5 per cent); or a mental health issue (5 per cent). (The low self-reporting of a mental health issue may reflect shame and stigma associated with mental health in some GRTTS communities.[88]) (Table 8.8).

8.15 As can be seen in Table 8.8, 17 per cent of Roma survey respondents’ households contain a person with a disability. Just under a tenth (8 per cent) stated that their household includes an adult with a physical disability; and a twentieth (4 per cent) said it includes someone with a visual, hearing or speech disability. Small proportions of households contain a child with a physical disability (2 per cent) or a learning disability (2 per cent) (households may contain more than one person with a disability). This leads to just under a quarter (24 per cent) stating that someone in the household experiences a disability or a long-term illness. This compares with over a quarter (27 per cent) of households in London, as recorded by the 2021 Census, containing someone with a disability.

Table 8.8: Health or mobility issues

Health or mobility issue	**Number**	**%**
No health issues	344	47%
Long-term illness	75	10%
Asthma	74	10%
Physical disability (adult)	55	8%
Problems due to old age	45	6%
Visual, hearing or speech disability	38	5%
Mental health issue	35	5%
Physical disability (child)	17	2%
A learning disability	14	2%
Severe sensory impairment	1	0%
Prefer not to say	91	12%

8.16 Survey respondents were asked about their employment status. As Table 8.9 shows, almost three-fifths (59 per cent)are employed. This compares with over four-fifths (85 per cent) of Roma 2021 Census HRPs and over two-thirds (69 per cent) of London 2021 Census HRPs. A quarter (25 per cent) are self-employed (which is higher than the London average of 16 per cent of economically active adults in London aged 16-64).[89] However, it is important to note that the categories used in the London GTANA household survey and the 2021 Census differ. Additionally, the GTANA determined

[88] NHS Race and Health Observatory, Inequalities in Mental Health Care for Gypsy, Roma, and Traveller Communities, page 10, September 2023
[89] ONS, Employment by Self-Employed, Full time and Part time and Gender, Borough, April 2024

the employment status of survey respondents, while the 2021 Census refers to HRPs. Therefore, the figures are not directly comparable. Just over a fifth (21 per cent) are employed full-time; and around a sixth (17 per cent) are unemployed (compared to only 3 per cent of Roma 2021 Census HRPs and 3 per cent of London 2021 Census HRPs recorded by the 2021 Census – see Table 3.9). Around an eighth (13 per cent) are employed part-time, and just under a tenth (9 per cent) are homemakers.

8.17 It is possible that some Roma household survey respondents who described themselves as 'unemployed' may actually be 'economically inactive' – i.e., neither working, nor actively seeking employment. The results of the 2021 Census and the London GTANA Roma household survey are not directly comparable, as the former uses the category 'economically inactive', but the latter does not. That a small proportion of respondent households described themselves as retired (4 per cent) may reflect the relatively young average age of respondents (Table 8.2 above).

Table 8.9: Employment status

Status	**Number**	**%**
Self-employed	178	25%
Employed full-time	154	21%
Unemployed	126	17%
Employed part-time	97	13%
Homemaker	66	9%
Student	30	4%
Retired	26	4%
Carer	22	3%
Not stated	20	3%
Other	10	1%
Total	729	100%

Access to services and affordability of living costs

8.18 The survey of Roma households contained questions about the extent to which households were able to access a range of services. As Table 8.10 below shows, most survey respondents described their access to services as 'good', 'very good' or 'okay'. In particular, almost two-thirds (65 per cent) described their access to transport as 'good' or 'very good', whilst over three-fifths (61 per cent) described their access to retail services as 'good' or 'very good'. However, services for which a fairly large proportion described their access as 'poor' or 'very poor' included entertainment (18 per cent), community facilities (29 per cent),[90] and help and advice (31 per cent).

[90] Community facilities include, for example, community centres and youth clubs.

Table 8.10: Access to services

	Very poor	Poor	Okay	Good	Very good	N/A	Not stated	Total
Education services	2%	5%	27%	35%	10%	16%	5%	100 %
Health services	5%	9%	33%	34%	12%	3%	4%	100 %
Transport	3%	5%	22%	47%	18%	2%	3%	100 %
Retail services	2%	6%	25%	43%	18%	2%	4%	100 %
Entertainment	6%	12%	27%	22%	14%	15%	4%	100 %
Community facilities[91]	14%	15%	29%	12%	6%	19%	5%	100 %
Help and advice	15%	16%	39%	17%	5%	3%	5%	100 %

8.19 Survey respondents were asked to rate their awareness of different types of housing services on a scale of one to five, where 'one' equates to not being aware of the service at all and 'five' equates to being fully aware. In general, there were low awareness levels for specified housing services. More than half said that they were 'not aware at all' or only 'slightly aware' of how to: apply for permanent local authority or housing association accommodation (53 per cent); apply for temporary accommodation (sometimes known as 'emergency accommodation', which may be allocated in response to, for example, households facing homelessness or domestic abuse) (62 per cent); or bid for local authority or housing association accommodation (63 per cent) (Table 8.11).

Table 8.11: Awareness of housing services

	Not aware at all	Slightly aware	Some-what aware	Aware	Fully aware	Not stated	Total
Permanent local authority/housing association housing	40%	13%	20%	15%	4%	8%	100 %
Temporary accommodation	45%	17%	14%	11%	5%	8%	100 %
Bidding for local authority/housing association accommodation	48%	15%	14%	11%	4%	8%	100 %

8.20 Similarly, survey respondents were asked to rate their ability to access different types of housing services on a scale of one to five, where 'one' equates to not being able to access the service at all, and 'five' equates to being fully able to do so. Again, most respondents reported low levels of access to housing services. More than half stated that were 'not able to access at all' or 'usually not able to access' permanent local

[91] Community facilities include, for example, community centres and youth clubs.

authority or housing association accommodation (64 per cent); temporary accommodation (64 per cent); or bidding for local authority/housing association accommodation (67 per cent) (Table 8.12).

Table 8.12: Access to housing services

	Not able to access at all	Usually not able to access	Somewhat able to access	Usually able to access	Fully able to access	Not stated	Total
Permanent local authority/housing association housing	49%	15%	13%	8%	4%	11%	100%
Temporary accommodation	49%	15%	13%	8%	4%	11%	100%
Bidding for local authority/housing association accommodation.	54%	13%	12%	8%	3%	10%	100%

8.21 The survey asked respondents about awareness of different rights, including eligibility for social housing; eviction processes; security of tenure; protection against harassment; and rights to benefits. As Table 8.13 below shows, very few survey respondents considered themselves fully aware of these rights, although in most instances they were 'somewhat aware'. Survey respondents were least likely to be aware of their eligibility for social housing (39 per cent); and rights in relation to dealing with harassment (38 per cent) and eviction processes (37 per cent).[92,93]

Table 8.13: Awareness of rights related to housing

Type	Fully aware	Somewhat aware	Not at all aware	Don't know[94]	N/A	Not stated	Total
Tenant	8%	49%	22%	11%	6%	4%	100%
Owner-occupier	2%	30%	28%	14%	21%	5%	100%
Eligibility for social housing	2%	33%	39%	16%	6%	4%	100%
Eviction processes	3%	27%	37%	21%	7%	5%	100%
Security of tenure	4%	36%	31%	16%	8%	5%	100%
Harassment	6%	29%	38%	18%	4%	5%	100%
Rights to benefits	8%	55%	19%	11%	2%	5%	100%

92 Rules regarding eligibility for social housing relate to immigration status. Local authorities may also set additional requirements for applying for social housing that may relate to, for example, length of residence in the borough, income and savings, behaviour and previous tenancy conduct.

93 The Equality Act 2010 protects individuals from discrimination, harassment, and victimisation, including in housing. Landlords have a duty to ensure that tenants are not harassed on grounds such as race, gender, disability, or other protected characteristics.

94 The response 'don't know' means that survey respondents did not know what to say in response to the question.

8.22 The survey asked about the extent to which respondents could afford housing costs, such as their rent or mortgage; and necessities, such as food and utilities. With the exception of food (54 per cent), and water (51 per cent), fewer than half stated that these expenses were 'fully' affordable (Table 8.14).

Table 8.14: Affordability of housing costs and other necessities

Affordability	Fully	Partly	Not at all	Don't know	Not stated	Total
Mortgage/rent	29%	38%	20%	6%	7%	100%
Heating	29%	51%	9%	4%	7%	100%
Electricity	36%	44%	8%	4%	8%	100%
Gas/oil	19%	42%	18%	13%	8%	100%
Water	51%	31%	6%	4%	8%	100%
Food	54%	32%	2%	3%	9%	100%

Current accommodation

8.23 As Table 8.15 below shows, the majority (61 per cent) of respondent households live in the private rented sector. (This compares with three-quarters (77 per cent) of Roma households, and just under a third (30 per cent), of all London households recorded by the 2021 Census – see Table 3.3.) Of these, over a third (38 per cent) rent from a private landlord, and over a fifth (23 per cent) from a lettings agent. Around a seventh (14 per cent) of households reside with family or friends, although it is not known whether this is by choice or due to the lack of alternative accommodation. A tenth (10 per cent) live in local authority or housing association accommodation. (This compares with under a tenth (8 per cent) of Roma households and over a fifth (23 per cent) of all London households recorded by the 2021 Census – see Table 3.3.) Smaller proportions own the accommodation they live in (6 per cent). (This compares with around a sixth (15 per cent) of Roma and just under half (47 per cent) of all London households according to the 2021 Census – see Table 3.3.) Four per cent of households live in temporary accommodation (The category "temporary accommodation" specified living in accommodation such as a B&B or hotel, a hostel, or a refuge. This means that respondents living in temporary accommodation within the private rented and social rented sectors are not identified by survey results as living in temporary accommodation.)

Table 8.15: Current accommodation

Tenure	Number	%
Rent from a private landlord	278	38%
Rent from a lettings agent	164	23%
Living with family or friends	104	14%
Rent from local authority/housing association	75	10%
Owner-occupied house/flat	41	6%
Temporary accommodation	29	4%
Other	38	5%
Total	729	100%

8.24 As Table 8.16 shows, over two-fifths (42 per cent) of survey respondents currently live in east London, with just over a fifth (21 per cent) residing in north London. Smaller proportions live in west London (17 per cent), south London (10 per cent), central London (9 per cent), or outside London (1 per cent).[95] The small number of respondents living outside London may be doing so due to a lack of suitable accommodation in London, but may have family links in London.

Table 8.16: Current location

Location	Number	%
East London	309	42%
North London	154	21%
West London	122	17%
South London	70	10%
Central London	68	9%
Outside London	6	1%
Total	729	100%

8.25 In terms of length of residence in their current accommodation, most survey respondents have lived there for one to two years (33.9 per cent), or three to five years (34 per cent). However, just under a fifth (18 per cent) of all households have resided in their current accommodation for more than five years. Smaller proportions have lived in their accommodation for one to three months (3 per cent), four to six months (0.1 per cent), or seven to 12 months (10 per cent) (Table 8.17).

[95] For the purposes of this GTANA, the London sub-regions are as follows:

- Central London: Camden, the City of London, Kensington and Chelsea, Islington, Lambeth, Southwark, Westminster.
- East London: Barking and Dagenham, Bexley, Greenwich, Hackney, Havering, Lewisham, Newham, Redbridge, Tower Hamlets, Waltham Forest.
- North London: Barnet, Enfield, Haringey.
- South London: Bromley, Croydon, Kingston upon Thames, Merton, Sutton, Wandsworth.
- West London: Brent, Ealing, Hammersmith and Fulham, Harrow, Richmond upon Thames, Hillingdon, Hounslow.

Table 8.17: Time in current accommodation

Period	Number	%
Less than 1 month	12	2%
1-3 months	24	3%
4-6 months	1	0.1%
7-12 months	69	10%
1-2 years	247	33.9%
3-5 years	242	33%
More than 5 years	134	18%
Total	729	100%

8.26 Survey respondents were asked how long they intend to remain in their current accommodation. The majority (66 per cent) stated that they did not know, although over a fifth (23 per cent) stated that they intend to stay for more than five years. Smaller proportions stated that they intend to stay in their current accommodation for one to two years (4 per cent) or three to five years (4 per cent). A small proportion (3 per cent) of households stated that they intend to remain in their current accommodation for a year or less (Table 8.18).

Table 8.18: How long respondents plan to stay in current accommodation

Period	Number	%
Less than 1 month	3	0%
1-3 months	9	1%
4-6 months	2	0%
7-12 months	17	2%
1-2 years	31	4%
3-5 years	31	4%
More than 5 years	159	23%
Don’t know	477	66%
Total	729	100%

8.27 Survey respondents were asked which type of accommodation they lived in before their current accommodation. Although the largest proportion (30 per cent) had rented from a private landlord, a substantial proportion (27 per cent) previously resided with family or friends. Around a sixth (17 per cent) of households previously rented from a lettings agent, whilst around a tenth (11 per cent) owned their previous accommodation. Smaller proportions previously rented from a local authority or housing association (6 per cent) or resided in temporary accommodation (3 per cent) (Table 8.19).[96]

[96] The category “temporary accommodation” specified living in accommodation such as a B&B or hotel, a hostel, or a refuge. This means that respondents residing in temporary accommodation within the private rented and social rented sectors are not identified by survey results as living in temporary accommodation

Table 8.19: Previous accommodation

Tenure	Number	%
Rent from a private landlord	221	30%
Living with family or friends	194	27%
Rent from a lettings agent	121	17%
Owner-occupied house/flat	84	11%
Rent from local authority/housing association	44	6%
Temporary accommodation	18	3%
Other	47	6%
Total	729	100%

8.28 Table 8.20 shows that the largest proportion (30 per cent) of survey respondents relied on family and friends to find their current accommodation. Fairly large proportions of households found their current accommodation through a lettings agency (20 per cent); directly from the landlord (14 per cent); by responding to an advert (13 per cent); or through a local authority or housing association (13 per cent). Smaller proportions found their current accommodation through a charity[97] (5 per cent) or bought the accommodation (2 per cent).

Table 8.20: How respondents found their current accommodation

How found	Number	%
Through family and friends	226	30%
Through a lettings agency	149	20%
From the landlord directly	102	14%
Responded to an advert	93	13%
Through a local authority/housing association	91	13%
Through a charity	33	5%
Bought the accommodation	14	2%
Other	21	3%
Total	729	100%

8.29 Sixteen per cent of survey respondents stated that they had always lived in their current accommodation. Others cited a wide range of reasons for moving there. The main reasons were to be closer to family and friends (23 per cent), and employment-related reasons (20 per cent). Smaller proportions of households moved to their current accommodation for education-related reasons (6 per cent); due to a friendly or known landlord (5 per cent); for health-related reasons (4 per cent); or due to a friendly or known lettings agency (3 per cent) (Table 8.21).

[97] It should be noted that the survey question considers charities as distinct from housing associations, although housing associations can also be registered as charities.

Table 8.21: Main reason for moving to current accommodation

Reason	Number	%
To be closer to family or friends	167	23%
For employment reasons	145	20%
Always lived here	118	16%
For education reasons	40	6%
A friendly/known landlord	35	5%
For health reasons	29	4%
A friendly/known lettings agency	24	3%
Other (please state)	68	9%
Don’t know	103	14%
Total	729	100%

8.30 The survey asked respondents how satisfied they are with their current accommodation. Table 8.22 shows that no households were ‘very satisfied’ with their current accommodation, although two-fifths (40 per cent) were ‘satisfied’. (This compares to 88.3 per cent of respondents to the EHS (2022-23) who were ‘very’ or ‘fairly’ satisfied with their current accommodation.)[98] Over a third (36 per cent) were ‘neither satisfied nor dissatisfied’ with their current accommodation. Almost a quarter (24 per cent) were either ‘dissatisfied’ (9 per cent) or ‘very dissatisfied’ (15 per cent) with their current accommodation. This compares with 6.9 per cent of respondents to the EHS (2022-23) who were very’ or ‘fairly’ dissatisfied with their current accommodation.

Table 8.22: Satisfaction with current accommodation

Satisfaction	Number	%
Very satisfied	0	0%
Satisfied	292	40%
Neither satisfied nor dissatisfied	261	36%
Dissatisfied	67	9%
Very dissatisfied	109	15%
Total	729	100%

8.31 Table 8.23 shows that just over half (51 per cent) of households stated that their accommodation is suitable for their needs. However, over a quarter (29 per cent) stated their current accommodation is not suitable, whilst a fifth (20 per cent) stated that they did not know. A small proportion (6 per cent) stated that they require adaptations, such as ramps, handrails or stair lifts, to remain in their current accommodation (Table 8.24).

[98] See MHCLG, English Housing Survey 2022 to 2023: satisfaction and complaints - fact sheet, Table FA5401: Satisfaction with accommodation

Table 8.23: Current accommodation suitable

Suitable	Number	%
Yes	372	51%
No	210	29%
Don't know	147	20%
Total	729	100%

Table 8.24 Require adaptations to remain in home

Required	Number	%
Yes	46	6%
No	605	83%
Don't know	78	11%
Total	729	100%

Accommodation needs

8.32 A key aim of the survey of Roma households was to determine respondents' accommodation needs. They were asked whether their household needs, or is likely to move to, alternative accommodation in the next five years. As can be seen from Table 8.25 below, a fifth (20 per cent) stated they need to move or are likely to do so.

Table 8.25: Need or likely to move in the next five years

Need to move	Number	%
Yes	147	20%
No	105	14%
Don't know	450	62%
Not stated	27	4%
Total	729	100%

8.33 Survey respondents cited a wide range of reasons for needing or being likely to move. (They were able to cite more than one reason.) Almost half (48 per cent) stated that their current accommodation was too small to accommodate them and they were overcrowded. Other reasons cited included the cost of utilities and/or rent (22 per cent); their current tenancy being insecure (14 per cent); disrepair (13 per cent); or health-related reasons (12 per cent).

Table 8.26: Reasons for needing/being likely to move in the next five years

Reason	Number	%
Not enough space/overcrowded	71	48%
Cost of utilities/rent too expensive	33	22%
Tenancy is insecure	21	14%
Accommodation in disrepair	19	13%
Health issues	17	12%
Suffering harassment	9	6%
To receive support/care	7	5%
Need accommodation easier to manage	6	4%
Employment reasons	4	3%
Old age	4	3%
Environment/pollution	3	2%
Too far from schools/services	1	1%

8.34 Respondents who indicated that their household needed, or was likely, to move in the next five years were asked to identify the tenure of accommodation and location they would prefer to move to. Over half (54 per cent) said a house or flat rented from a local authority or housing association; just over a fifth (22 per cent) said an owner-occupied house or flat; and a fifth (20 per cent) said a private rented house or flat (Table 8.27).

Table 8.27: Preferred tenure of accommodation

Tenure	Number	%
A house/flat rented from local authority/housing association	79	54%
Owner-occupied house/flat	33	22%
Private rented house/flat	30	20%
Other (please specify)	2	2%
Not stated	3	2%
Total	147	100%

8.35 Roma households likely or needing to move in the next five years were asked where they would most like to move to. Table 8.28 shows the London sub-region in which these households were living when they completed the survey (‘original location’ column), and where they would prefer to live (‘preferred location’ column). For example, over half (52 per cent) wanting or needing to move were located in east London when they completed the survey, and over two-fifths (41 per cent) of households would prefer to live in east London. Generally, households who stated that they needed or were likely to move preferred to remain in their current area. However, a fairly large proportion (17 per cent) stated that they would live anywhere in London.

Table 8.28: Preferred area

Sub-region	Original location		Preferred location		Stay in current sub-region	
	No.	%	No.	%	No.	%
East London	77	52%	60	41%	64	88%
Central London	29	20%	20	14%	25	86%
West London	21	14%	12	8%	18	86%
North London	16	11%	17	12%	14	88%
South London	3	2%	7	5%	2	67%
Outside London	1	1%	0	0%	N/A	N/A
Anywhere in London	0	0%	25	17%	N/A	N/A
Other	0	0%	6	4%	N/A	N/A
Not stated	0	0%	0	0%	N/A	N/A
Total	147	100%	147	100%	123	84%

Household members' future accommodation needs

8.36 Survey respondents were asked whether any person currently living with them – for example, a child or parent – would require separate accommodation within the next five years (Table 8.29). A small proportion (7 per cent) said yes. This group accounted for an overall total of 52 household members requiring a separate home within the next five years.

Table 8.29: People in household who need to move in the next five years

Need to move	Number	%
Yes	52	7%
No	323	44%
Don't know	326	45%
Not stated	28	4%
Total	729	100%

Table 8.30: How many homes will household members need?

Homes	Number	%
1	39	75%
2	10	19%
3	2	4%
4	1	2%
Total	52	100%

8.37 Over a fifth (23 per cent) of survey respondents stated that household members who need to move would prefer to move immediately, with a further third needing to move within a year. Around a sixth (15 per cent) stated that household members would need separate accommodation within one to two years, with a further sixth (15 per cent) stating that they would do so within three to five years (Table 8.31). (Please note that households may contain more than one person who requires a separate home in the next five years.)

Table 8.31: When household members will need separate homes

Period	Number	%
Now	16	23%
Within a year	23	34%
Within 1-2 years	10	15%
Within 3-5 years	10	15%
Don't know	9	13%
Total	68	100%

8.38 Over half (51 per cent) of respondents said their household members who need to move would prefer to live in a house or flat rented from a local authority or housing association. Around a sixth (17 per cent) would prefer to rent from a private landlord, and just under a tenth (9 per cent) in an owner-occupied accommodation (Table 8.32).

Table 8.32: Household members' preferred tenure

Type	Number	%
Rent from local authority/housing association	35	51%
Not sure	16	23%
Rent from a private landlord	12	17%
Owner-occupied accommodation	5	9%
Total	68	100%

8.39 Survey respondents were asked in which location or area household members needing or likely to require separate accommodation would prefer to live. Similarly to survey respondents needing or intending to move (Table 8.25), most household members needing or likely to require separate accommodation would prefer to remain in their current area. Just under a sixth (15 per cent) stated they would live anywhere in London (Table 8.33).

Table 8.33: Preferred location of household members

Sub-region	Original location		Preferred location		Stay in current sub-region	
	No.	%	No.	%	No.	%
East London	27	52%	30	44%	24	89%
North London	12	23%	15	22%	10	83%
South London	0	0%	1	1%	0	0%
West London	6	12%	3	4%	4	67%
Central London	7	13%	6	9%	5	71%
Anywhere in London	0	0%	10	15%	N/A	N/A
Outside London	0	0%	3	4%	N/A	N/A
Other	0	0%	0	0%	N/A	N/A
Not stated	0	0%	0	0%	N/A	N/A
Total	52	100%	68	100%	43	83%

Calculation of accommodation need[99]

8.40 The assessment of Roma households' need for accommodation is based on the model suggested in DCLG (2007) guidance (see paragraph 4.35). It determines accommodation need for 2022-23 to 2031-32 in two five-year periods. The remainder of this chapter sets out these calculations and describes the steps involved.

Need for accommodation 2022-23 to 2026-27

8.41 The results of the accommodation needs calculations for the first five-year period are summarised in Table 8.34, below. Each step of the calculation is explained in the text following the table. It is important to note that this assessment determines household need for additional accommodation, rather than demand or preferences for accommodation (see paragraph 4.40).

8.42 As Table 8.34 shows, the need for additional accommodation mainly derives from households in housing needing to move; households in overcrowded housing needing to move; and newly forming households.

Table 8.34: Estimate of the need for homes for Roma 2022-23 to 2026-27

1) Current homes occupied by Roma households	14,462
Additional accommodation supply	
2) Number of existing dwellings expected to become vacant through mortality	409
3) Number of households in housing expected to move out of London	0
4) Dwellings vacated by movement within the stock	2,777
Total additional supply	3,186
Additional accommodation need	
5) Households in housing seeking to move	2,777
6) Households in overcrowded housing	2,678
7) Newly forming households	2,859
Total need	8,314
Balance of need and supply	
Total additional housing needed	5,129

8.43 The remainder of this chapter describes the process and results of calculating the accommodation needs for Roma households.

Supply of homes 2022-23 to 2026-27

8.44 Supply steps (Steps 1 to 5) determine the number of homes currently occupied by Roma households; and the number of additional homes expected to become available during the first five-year period.

[99] Please note that due to rounding column totals may differ slightly from row totals.

Step 1: Current homes occupied by Roma households

8.45 This is based on 2021 Census data on the number of households. There are 14,462 Roma households residing in London.

Step 2: Number of existing dwellings expected to become vacant through mortality

8.46 This is calculated using a mortality rate, as applied in conventional Housing Needs Assessments. However, the figures for mortality have been increased in accordance with studies of the Roma community, which suggest they experience significantly poorer health outcomes compared to the general population, often linked to wider social determinants such as housing, employment, and education.[100] Applying a mortality rate of 2.825 per cent (see paragraphs 4.48 to 4.50) over the five-year period results in an additional supply of 409 homes. Although vacant homes arising from mortality will not necessarily be made available to Roma households (see paragraph 4.45), this assumption is necessary for the purposes of the assessment.

Step 3: Number of households in housing expected to move out of London

8.47 This is determined by analysing responses to the online survey. No households stated that they intend to move out of London in the next five years.

Step 4: Dwellings vacated by movement within the stock

8.48 This is determined by survey responses and derives from households stating that they intend to move within London to meet their accommodation needs. This results in 2,777 homes becoming vacant and contributing to additional supply. (However, it cannot be assumed that all vacant homes arising from household movement are available to Roma households – see paragraph 4.45).

[100] Warwick-Booth, L. et al., (2017) 'Health within the Leeds Migrant Roma Community: An Exploration of Health Status and Needs within One UK Area', Health, 9(4).

Need for homes 2022-23 to 2026-27

Step 5: Households in housing seeking to move

8.49 This is calculated by analysing responses to the online survey. It represents the accommodation needs of households who stated that they need or are likely to move to alternative accommodation. This results in a need for 2,777 homes.

Step 6: Households in overcrowded housing

8.50 Additional accommodation need deriving from overcrowding is calculated by comparing the number, sex, age, and relationship of household members with the ‘bedroom standard’ (see Appendix 9). The standard is then compared with the actual number of bedrooms (including bedsitters) currently available for the sole use of the household. Bedrooms not actually in use are counted, unless they are uninhabitable. Analysis of survey data indicates a need for 2,678 homes due to overcrowding.

Step 7: Newly forming households expected from within existing households

8.51 The number of individuals expected to leave their current accommodation to create new households is estimated from survey data. This relates to the number of additional homes required by household members aged 16 or over at the time of the survey, who respondents reported would require separate accommodation over that period. This results in a need for 2,859 additional homes (based on either an individual or a larger household requiring separate accommodation).

Balance of need and supply

8.52 From the accommodation calculation steps outlined above, the total additional number of homes needed is calculated by deducting the additional supply from the additional need – i.e., a total need of 8 additional homes, *less* an additional supply of 3,186 homes, equals a net need of 5,129 additional homes. Any accommodation need not met during the first five-year period (i.e., 2022-23 to 2026-27) will need to be carried forward to the second five-year period (i.e., 2027-28 to 2031-32).

Need for homes 2027-28 to 2031-32

8.53 It is assumed that the accommodation needs identified in Table 8.34 above – i.e., 5,129 additional homes – will be met during the first five-year period. (While this might be viewed as an optimistic assumption, it is necessary for the purpose of this assessment. Any need that has not been met in the first five-year period will need to be carried over to the second five-year period. Additional supply not made available for need within the first five years should be removed from the supply and reinstated as part of the assessed need, and carried over. As such, only natural population increase and mortality need to be considered when calculating need for the second five-year period.[101]

8.54 For this accommodation assessment, analysis of the current population using survey responses indicates an annual household growth rate of 2.51 per cent per annum (compound), equating to a five-year rate of 13.20 per cent. This is based on an analysis of various factors derived from the household surveys, including current population numbers; the average number of children per household; and marriage/cohabitation/civil partnership rates. A mortality rate of 2.825 per cent (see paragraph 4.48 to 4.50) applied over the five-year period leads to a net population growth rate of 10.375 per cent (13.20 – 2.825 = 10.375). The net growth rate of 10.375 per cent is applied to the number of households at the beginning of the second five-year period. This results in an estimated number of households at the end of the second five-year period. It leads to a need for 378 additional homes during the second five-year period.

Conclusion

8.55 This chapter has provided both quantitative and qualitative data regarding key characteristics of respondent Roma households. Accommodation needs resulting from the calculations in the tables and paragraphs above are set out in Tables 8.35, 8.36 and 8.37 below.

8.56 Please note that OPDC's accommodation needs were determined by apportioning needs from the three boroughs it covers, according to the proportion of Roma households from each borough in the OPDC area.[102] For example, 6 per cent of Roma households in Ealing live in the part of the borough covered by the OPDC. Therefore, 6 per cent of need from Roma households in Ealing is apportioned to OPDC.

Table 8.35: Accommodation needs of Roma households living in bricks and mortar homes (London)

Period	Need
2022-23 to 2026-27	5,129
2027-28 to 2031-32	2,033
Total	7,162

[101] The online Roma household surveys identified very small numbers of households wanting to move in or out of London.
[102] The OPDC area is situated within the London boroughs of Hammersmith and Fulham, Brent, and Ealing.

Table 8.36: Accommodation needs of Roma households living in bricks and mortar homes (London sub-region)

Sub-region	2022-23 to 2026-27	2027-28 to 2031-32	Total need 2022-23 to 2031-32
Central London	1,225	484	1,709
East London	1,349	536	1,885
North London	616	244	860
South London	737	293	1,030
West London	1,202	476	1,678
Total	5,129	2,033	7,162

Table 8.37: Accommodation needs of Roma households living in bricks and mortar homes by Local Planning Authority

Local Planning Authority	2022-23 to 2026-27	2027-28 to 2031-32	Total need 2022-23 to 2031-32
Barking and Dagenham	109	43	152
Barnet	224	89	313
Bexley	37	15	52
Brent	310	124	434
Bromley	74	29	103
Camden	163	64	227
City of London	4	1	5
Croydon	133	53	186
Ealing	194	76	270
Enfield	134	53	187
Greenwich	119	47	166
Hackney	134	53	187
Hammersmith and Fulham	250	99	349
Haringey	258	102	360
Harrow	116	46	162
Havering	42	17	59
Hillingdon	81	32	113
Hounslow	124	49	173
Islington	149	59	208
Kensington and Chelsea	182	72	254
Kingston upon Thames	62	25	87
Lambeth	238	94	332
Lewisham	156	62	218
Merton	105	42	147
Newham	275	109	384
OPDC	16	6	22
Redbridge	111	44	155
Richmond upon Thames	55	22	77
Southwark	239	95	334
Sutton	45	18	63
Tower Hamlets	318	126	444
Waltham Forest	154	61	215
Wandsworth	269	107	376
Westminster	249	99	348
Total	5,129	2,033	7,162

9. Conclusion

Summary

This GTANA forms an integral part of the evidence base for policy development, helping the GLA and London boroughs to effectively plan to meet the accommodation needs of GRTTS communities.

This Chapter summarises the needs calculations for each cohort; considers the role of negotiated stopping and group housing schemes in meeting accommodation needs, citing examples of good practice; and describes funding available for providing pitches and plots.

Finally, the Chapter concludes by noting points partners may find helpful when seeking to address need.

Introduction

9.1 This GTANA assesses the accommodation needs of Gypsies and Travellers residing on sites; Gypsies and Travellers residing in bricks and mortar; Travelling Showpeople; and the Roma community. It forms part of the evidence base for London government and boroughs for policy development in housing and planning. It provides evidence that boroughs can use to inform Local Plan and policy making and to assist in policy implementation, for example, of London Plan and Local Plan policies, where relevant.

9.2 The accommodation needs calculations undertaken as part of this GTANA are based on analysing secondary data, and on primary data collected through household surveys. This comprehensive approach supports the accuracy and reliability of findings.

9.3 The GTANA recognises that there are significant constraints to providing new sites in London – including limited funding; a lack of affordable land; and competing pressures for land from sectors such as housing (including homes for GRTTS communities), industrial, retail and employment uses. And Green Belt constraints, and the desire to use brownfield sites, may influence the location of new accommodation. These constraints were highlighted in the stakeholder consultation undertaken as part of the GTANA and reported in Appendix 16.

Accommodation needs

9.4 The GTANA determines accommodation needs for London over the period 2022-23 to 2031-32 as follows:

Table 9.1: Summary of accommodation needs 2022-23 to 2031-32

	2022-23 to 2026-27	**2027-28 to 2031-32**	**Total need**
Gypsies and Travellers permanent pitches	684	177	861
Gypsies and Travellers transit pitches			87
Travelling Showpeople permanent plots	66	17	83
Gypsies and Travellers bricks and mortar homes	633	373	1,006
Roma bricks and mortar homes	5,129	2,033	7,162

9.5 It is likely that accommodation needs not identified in this GTANA could arise during the period for which it calculates need. Therefore, it is recommended that LPAs also consider accommodation needs that might materialise over that period from GRTTS households not considered by this assessment. This could include a need from households residing on authorised and unauthorised developments or unauthorised encampments, from bricks and mortar or from those moving into the area.

9.6 It is possible that there is or will be an overlap between the need for bricks and mortar homes identified by the GTANA and housing needs assessments undertaken by boroughs and/or the GLA. It is for boroughs to determine whether this is the case. The next London SHMA will seek to recognise that the 2025 GTANA includes a calculation of need for bricks and mortar homes arising from the Gypsy and Traveller, and Roma populations.

Negotiated stopping

9.7 Negotiated stopping is based on a mutual agreement between a landowner (often a local authority) and Gypsy and Traveller, and Showpeople households who are seeking a stopping place. The agreement allows the households to stop at a site for a specified period, subject to meeting particular conditions. Agreements will vary but may include households agreeing to leave sites clean and not make too much noise. The landowner typically provides waste disposal and basic temporary facilities, such as portaloos. Some London boroughs (for example, Hackney and Enfield) have implemented a negotiated stopping policy.

9.8 For negotiated stopping to work, local authorities negotiate with Gypsies and Travellers to agree on solutions. It can sometimes involve directing Gypsy and Traveller households away from contentious public spaces to more appropriate places. The approach is proven to achieve significant savings in public spending and to decrease social costs for Gypsy, Traveller and Travelling Showpeople communities.

9.9 Places used as stopping places may not require planning permission if they are in use for fewer than 28 days in a year. This may be the case if a site will only be used for a proportion of the year; and individual households will normally only stay at the agreed location for a few days. In such cases, land does not have to be formally designated for use as a stopping place.

9.10 Research undertaken by LGT and De Montfort University on behalf of the GLA (2019) recommended negotiated stopping as a balanced and humane approach to managing roadside camps, compared with local authorities undertaking enforcement action.

9.11 The GLA (2019) report cites several examples of good practice, including Hackney Council. There are multiple locations in the borough that were common stopping places – some used for short periods of time by households passing through or visiting relatives, others used for months and even a couple of years. Hackney has worked closely with the Gypsy and Traveller community, and involved them in dialogue and negotiation. This has resulted in a consistent practice, over many years, of allowing stopping time and providing basic facilities at those locations. This practice has, to some extent, been formalised through leniency agreements, which specify arrangements between the local authority and households using the sites. A standard leniency agreement was incorporated in the council's unauthorised encampment protocol. (Please see Appendix 12 for an example negotiated stopping protocol.)

Gypsy and Traveller group housing schemes

9.12 One recent example of good practice in Gypsy and Traveller accommodation provision is group housing schemes. These are groups of homes – either standalone developments or part of a wider housing development – with additional facilities and amenities, specifically designed to accommodate large households that include extended family members. For example, homes may have sufficient bedrooms to accommodate larger families, and sufficient space for occupants and visiting families to park vehicles such as caravans. Design considers safety issues related to increased vehicle traffic. The group housing approach originated in Ireland.

9.13 Group housing allows Gypsies and Travellers to live in close proximity, preserving their traditions, languages and cultural practices. By living together, families can support each other, fostering a strong sense of community and mutual aid. A good example of a group housing is a site in Hackney. This mixed scheme has eight homes – six of these are bungalows, and two are more traditional pitches with amenity blocks ('sheds'). The residents, who had family in Ireland, suggested this approach to the council. Finance for the scheme was available through the London 2012 Olympic Fund, as a site had to be relocated to allow for development of the Olympic Park. Although not necessarily easy to replicate in some other contexts, it demonstrates an innovative approach that could be adopted elsewhere.[103]

[103] Jo Richardson and Janie Codona MBE, 'Managing and delivering Gypsy and Traveller sites: negotiating conflict', 2016

Funding for new pitch and plot provision

9.14 Capital funding is available, through the Mayor's Affordable Homes Programme, to help remodel existing Gypsy and Traveller sites and pitches in need of refurbishment or develop new sites. The Mayor is keen to provide funding for London boroughs and housing associations for these purposes.

9.15 In March 2022, DLUHC launched £10m of capital funding for 2022-23 to support local authorities in developing new transit and permanent traveller sites; refurbishing existing permanent traveller and transit sites; and providing temporary stopping places and facilities for Gypsies and Travellers. This funding has been awarded to nine local authorities across 16 traveller site projects, helping to improve life chances and social outcomes. Although DLUHC's Traveller Site Fund 2022-23 is now closed, it is possible that government funding for new sites and refurbishing existing sites may become available in future.

Considerations when seeking to meet need

9.16 As part of work to meet the accommodation needs of the GRTTS communities set out in this assessment, partners (including the GLA, boroughs and others who work with GRTTS communities, where applicable) may find it helpful to:

- work closely with Gypsy, Traveller and Travelling Showpeople households to determine how the need for pitches and plots can best be met
- consider providing pre-planning application advice to households who have identified land to help determine if it is potentially suitable to address accommodation need
- consider safeguarding Gypsy and Traveller sites and Travelling Showpeople yards with permanent planning permission for their current use (both private and local authority pitches/plots)
- review the planning status of unauthorised developments; and consider whether there is scope to grant lawfulness status, bearing in mind the potential this has to contribute towards meeting needs
- consider how homelessness policies and funding opportunities could serve to assist in the housing of GRTTS communities; and reduce overcrowding on pitches/plots and in bricks and mortar (including hostels and temporary accommodation), unauthorised encampments, and rough sleeping
- consider available funding for improving or developing new Gypsy and Traveller sites, under the GLA's Affordable Homes Programme, and any other sources through which funding becomes available
- review the size and condition of pitches on local authority sites, and bricks and mortar accommodation; and how best to address the living standards of existing

sites and bricks and mortar accommodation in particular, where there are health and safety concerns impacting occupants' health and wellbeing and/or where accommodation is in disrepair

- consider the affordability of accessing and maintaining housing, and ensure access to entitlements for support with housing costs, among GRTTS communities; this includes Gypsies and Travellers, and Travelling Showpeople, when purchasing land and applying for planning permission for a site/plot, and all GRTTS communities when purchasing or renting bricks and mortar accommodation
- consider the impacts of any planning conditions associated with planning permission on the costs borne by households
- consider alternative site funding mechanisms, such as site acquisition funds,[104] loans for private site provision through Community Development Financial Institutions and joint ventures with members of the GRTTS communities
- consider whether the group housing model highlighted at paragraphs 9.12 to 9.13 could play a part in meeting need
- consider implementing a negotiated stopping policy to address unauthorised encampments for set periods at agreed locations
- consider making provision for new transit sites, taking into account the suitability of the location and management arrangements needed
- seek to raise awareness, among the Roma community and Gypsies and Travellers, of housing-related rights; sources of advice and support with housing problems; and entitlements to support with housing costs
- seek to raise awareness, amongst service providers, of language and cultural barriers, racism and discrimination faced by GRTTS communities in their access to services; and the impact of culture on housing needs and housing provision.

[104] 'Site acquisition funds' are financial resources allocated specifically for the purpose of purchasing land or property. These funds are often used by governments, businesses, or non-profit organisations to secure locations for development projects such as housing, commercial buildings, industrial facilities, or community services. The availability of site acquisition funds can be crucial in enabling these entities to acquire the necessary land to proceed with their planned developments. Site acquisition funds can derive from sources such as government grants and funding programs, local authority budgets, and, in some cases, contributions from private developers through planning obligations known as Section 106 agreements.

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Glossary

Amenity block
A small building on a pitch with a bath/shower, WC, sink and (in some larger ones) space to eat and relax. This is also known as an amenity shed.

Authorised site
A site with planning permission for use as a Gypsy and Traveller site. It can be privately owned (often by a Gypsy or Traveller), leased or socially rented (owned by a council or housing association).

Average
When used in this report, the term 'average' is taken to be a mean value, unless otherwise stated.

Bricks and mortar accommodation
Conventional, fixed housing (such as houses, flats or apartments) built from permanent materials such as bricks, wood or concrete. This term contrasts with the traditional forms of accommodation for Gypsies and Travellers, such as caravans, mobile homes or other moveable dwellings.

Caravan
Defined by Section 29 (1) of the Caravan Sites and Control of Development Act 1960:

> "Any structure designed or adapted for human habitation which is capable of being moved from one place to another (whether by being towed or by being transported on a motor vehicle or trailer) and any motor vehicle so designed or adapted."

Concealed household
A household or family unit that currently lives within another household or family unit; but would prefer to live independently and is unable to access appropriate accommodation (on sites or in housing) (see 'hidden' household below).

Cultural preference
The 'cultural preference' of Gypsies and Travellers to reside on sites, rather than in bricks and mortar accommodation is rooted in their historical nomadic heritage; strong community and family ties; and the preservation of their unique cultural identity and way of life. Living on sites allows them to maintain flexibility and mobility, which are essential for their traditional occupations and lifestyles. Additionally, there is often resistance to living in bricks and mortar homes due to concerns about losing cultural identity, facing discrimination, and being isolated from their community.

Doubling up
More than one family unit sharing a single pitch.

Emergency stopping places
Emergency stopping places are pieces of land in temporary use as authorised short-term (less than 28 days) stopping places for all travelling communities. They may not require planning permission if they are in use for fewer than 28 days in a year. The requirements for emergency stopping places reflect the fact that the site will only be used for a proportion of the year; and that individual households will normally only stay on the site for a few days.

Family owner-occupied Gypsy site
Refers to a piece of land specifically designated for use by Gypsies and Travellers, where the land is owned and occupied by a single-family unit. The site is privately owned by members of a single family, rather than being a public or council-run site. This allows the family to have control over the land and its usage. Family sites are considered the ideal by many Gypsies and Travellers in England, yet they are often viewed as unattainable. The two major obstacles are cost; and obtaining the necessary planning permission and site licence. While cost is a significant barrier for many Gypsies and Travellers, the challenge of securing planning permission for land to be used as a Gypsy caravan site (even for a single caravan) is equally restrictive. Both factors present substantial challenges to realising the aspirations of those who could otherwise afford to buy and develop a family site.

Family unit
The definition of ‘family unit’ is used flexibly. The survey assumes that a pitch is occupied by a single household or family unit, although it acknowledges that this may also include, for example, extended family members or hidden households.

Gypsy
Member of one of the main groups of Gypsies and Travellers in Britain. In this report it is used to describe English (Romany) Gypsies, Scottish Travellers and Welsh Travellers. English Gypsies were recognised as an ethnic group in 1988.

Hidden household
A household not officially registered as occupying a site/yard or pitch/plot, who may or may not require separate accommodation (see ‘concealed house’, above).

Household
The definition of ‘household’ is used flexibly. The survey assumes that a pitch is occupied by a single household or family unit, although it acknowledges that this may also include, for example, extended family members or concealed or hidden households.

Irish Traveller
Member of one of the main groups of Gypsies and Travellers in Britain. Distinct from Gypsies but sharing a nomadic tradition, Irish Travellers were recognised as an ethnic group in England in 2000.

Local authority sites
Local authority sites are designated areas provided and managed by local government bodies to accommodate Gypsies and Travellers. The majority of local authority sites are designed for permanent residential use.

Local Development Documents (LDDs)
Local Development Documents (LDDs) are the set of documents that collectively guide the planning and development framework for a local area in England. They are produced by LPAs to form part of the Local Development Framework (LDF), now often referred to as the Local Plan. LDDs provide detailed policies, strategies and proposals for the use of land and development within a local authority's jurisdiction.

Negotiated stopping
The term 'negotiated stopping' is used to describe agreed short-term provision for Gypsy and Traveller or Travelling Showpeople caravans. It does not describe permanent 'built' transit sites, but negotiated arrangements that allow caravans to be sited on suitable specific pieces of ground for an agreed and limited time, with the provision of limited services such as water, waste disposal and toilets. The arrangement is typically between a local authority and the (temporary) residents.

Net need
The difference between need and the expected supply of available pitches (for example, from the re-letting of existing socially rented pitches or from new sites being built).

New Traveller (formerly 'New Age Traveller')
Member of the settled community who has chosen a nomadic or semi-nomadic lifestyle. The first wave of New Travellers began in the 1970s and were associated with youth culture and 'new age' ideals. They now comprise a diverse range of people who seek an alternative lifestyle for differing reasons including personal or political convictions. Economic activities include making hand-made goods that are sold at fairs.

Newly forming households
Households that currently live as part of another family unit, without being part of the main couple, and who need or intend to move to their own separate accommodation, rather than continuing to live with the family they are currently staying with.

Permanent residential site
A permanent residential site for Gypsies and Travellers is a designated area where individuals or families can live year-round, with the site typically offering essential services

such as water, electricity and waste disposal. These sites are meant for long-term accommodation, providing stability and security, as opposed to temporary or transit sites which are intended for short-term stays. Permanent residential sites can either be publicly owned and managed by local authorities, or privately owned by individuals or families within the Gypsy and Traveller community. Residents of such sites often have established connections to local services like schools and healthcare, ensuring their integration into the broader community.

Pitch
A Gypsy and Traveller pitch is a designated area within a site where an individual household can live and station their caravan or mobile home. A pitch typically includes space for a caravan or mobile home, parking for vehicles, and may also provide utility connections such as water, electricity and waste disposal. In some cases, pitches may include additional facilities such as an amenity block with kitchen, bathroom and storage space. A pitch is usually part of a larger Gypsy and Traveller site, which can be publicly or privately owned. It is intended for long-term residential use by Gypsies and Travellers.

Plot
A Travelling Showpeople plot is an area on a yard developed for a household to occupy. It is used for stationing caravans and other vehicles; and is typically larger than a Gypsy and Traveller pitch, to accommodate fairground equipment. These plots are designed to meet the unique needs of Travelling Showpeople, providing space for both residential living and the storage or maintenance of equipment used in their work.

Primary data
Information collected from a bespoke data collection exercise (for example, surveys, focus groups, or interviews) and analysed to produce a new set of findings.

Private rented pitches
Pitches on sites that are rented on a commercial basis to Gypsies and Travellers. The actual pitches tend to be less clearly defined than on socially rented sites.

Psychological aversion
Whilst not a medical condition, this is a term that is accepted as part of accommodation assessments in encapsulating a range of factors that demonstrate an aversion to residing in bricks and mortar accommodation (see DCLG October 2007). These can include feelings of depression, stress or sensory deprivation; feeling trapped or cut off from social contact; a sense of dislocation from the past; and feelings of claustrophobia. Some GTANAs use psychological aversion to residing in bricks and mortar accommodation as a factor in determining accommodation needs. However, the 2025 London GTANA uses ‘cultural preference’ rather than ‘psychological aversion’ to determine the accommodation needs of Gypsy and Traveller households residing in bricks and mortar homes who would prefer to live on a site (please see Glossary entry above).

Roma
Historically, the Roma community originated in northern India and settled in Europe (including areas that are now Romania, Slovakia, the Czech Republic and Poland), before migrating to the UK more recently. Culturally, Roma individuals may belong to any one of around 40 different groups and tribes. Since 1945, small numbers of the Roma community arrived in the UK, with some seeking asylum in the 1990s and early 2000s. This was followed by a growth in the UK's Roma population following expansion of the European Union in 2004 and 2007.

Secondary data
Existing information that someone else has collected. Data from administrative systems and some research projects are made available for others to summarise and analyse for their own purposes (for example, Traveller Caravan Count).

Settled community
Used to refer to non-Gypsies and Travellers who live in housing.

Site
An area of land laid out and/or used for Gypsy and Traveller caravans for residential occupation, which can be authorised (have planning permission) or unauthorised. Sites can be owned by a Gypsy and Traveller resident or rented from a private or social landlord. Sites vary in type and size and can range from one-caravan private family sites on Gypsies' and Travellers' own land, through to large local authority sites. Authorised private sites (those with planning permission) can be small, family-run or larger sites.

Socially rented site
A Gypsy and Traveller site owned by a council or private registered provider. Similar to social rented homes, rents are subsidised and offered at below market levels.

Tolerated
An unauthorised development or encampment may be tolerated by the local authority, meaning that no enforcement action is currently being, or is likely to be, taken.

Transit site/pitch
A transit site/pitch is a type of temporary accommodation provided for Gypsies and Travellers who are moving through an area. These sites are intended for short-term stays, usually ranging from a few days to several weeks. They provide basic amenities such as water, electricity and waste disposal. Transit sites help accommodate nomadic lifestyles by offering a legal and managed space for stopping while travelling.

Travellers
For the purposes of this GTANA, "Travellers" means "Gypsies and Travellers" and "Travelling Showpeople" as defined by PPTS Annex 1. Draft guidance to local housing authorities on the periodic review of housing needs (March 2016) recommends that GTANAs

assess Travelling Showpeople's accommodation needs separately from those of Gypsies and Travellers.

Travelling Showpeople
People who organise circuses and fairgrounds and who live on yards when not travelling between locations. Most Travelling Showpeople are members of the Showmen's Guild of Great Britain.

Travelling Showpeople plot
An area on a yard for Travelling Showpeople to occupy. As well as dwelling units, typically caravans, Travelling Showpeople often store commercial equipment on a plot.

Travelling Showpeople yard
An area of land laid out and/or used for Travelling Showpeople for residential occupation can be authorised (have planning permission) or unauthorised. Yards can be owned by a Travelling Showperson resident or rented from a private or social landlord. Some yards are leased or rented from the Showmen's Guild. They can vary in type and size, although they need to consider residents' need to store and maintain fairground equipment.

Unauthorised development
Unauthorised developments include situations where Gypsy, Traveller or Travelling Showpeople households are occupying land that they do not own. A local authority may 'tolerate' an unauthorised development, meaning that no enforcement action is currently or likely to be taken, whereas a local authority may be actively working to remove a 'not tolerated' unauthorised development.

Unauthorised encampment
Unauthorised encampments include situations where households temporarily occupy land that they do not own without the owner's consent. As such, trespass has occurred. An encampment can include one or more vehicles, caravans, or trailers.

Unauthorised site
Land occupied by Gypsies and Travellers without the appropriate planning or other permissions. The term includes both unauthorised development and unauthorised encampment.

List of acronyms

ADHD – Attention Deficit Hyperactivity Disorder

COPD – Chronic Obstructive Pulmonary Disease

CRE – Commission for Racial Equality

DCLG – Department for Communities and Local Government

DLUHC – Department for Levelling Up, Housing and Communities

EQIA – Equalities Impact Assessment

GLA – Greater London Authority

GTANA – Gypsy and Traveller Accommodation Needs Assessment

GRTTS – Gypsies, Roma, Travellers and Travelling Showpeople

HRP – Household Reference Person

LDD – Local Development Documents

LDF – Local Development Framework

LPA – Local Planning Authority

MHCLG – Ministry of Housing, Communities and Local Government

NPPF – National Planning Policy Framework

ODPC – Old Oak Park Royal Development Corporation

ONS – Office for National Statistics

PPTS – Planning Policy for Traveller Sites

SHMA – Strategic Housing Market Assessment