

The homelessness monitor: Scotland 2026

Beth Watts-Cobbe, Glen Bramley, Hal Pawson, Gillian Young, Lynne McMordie, Rhiannon Sims & Suzanne Fitzpatrick. Institute for Social Policy, Housing and Equalities Research (I-SPHERE), Heriot-Watt University; City Futures Research Centre, University of New South Wales.

Executive summary
October 2026

The homelessness monitor

The homelessness monitor is a longitudinal study providing an independent analysis of the homelessness impacts of recent economic and policy developments across Great Britain. Separate reports are produced for England, Scotland and Wales.

This sixth Scotland-focused report updates our account of how homelessness stands in 2026, or as close to 2026 as data availability allows. It also highlights emerging trends and forecasts some of the likely future changes, identifying the developments likely to have the most significant impacts on homelessness.

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About Crisis

Crisis is the national charity for people experiencing homelessness. We help people out of homelessness and campaign for the changes needed to solve it altogether.

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Disclaimer: All views and any errors contained in this report are the responsibility of the authors. The views expressed should not be assumed to be those of Crisis or any of the key informants who assisted with this work.

Foreword



At Crisis our vision for Scotland is one where homelessness is rare, briefed and not repeated. This edition of the Homelessness Monitor Scotland comes at a time of real opportunity for change. With the passing of the Housing (Scotland) Act 2025 Government committed to a landmark reform for the Scottish homelessness system. New legal duties will create a shared public sector responsibility for public services to 'ask' and 'act' to prevent homelessness before it occurs, as well as requiring local authorities to act earlier, at least 6 months before someone becomes homeless.

In the recent Programme for Government, the First Minister set out his aspirations to 'end homelessness for everyone'; outlining that this government's approach will be to 'shift from crisis management to prevention and rapid rehousing'. This is backed up with a 10-year financial commitment of £50 million for a homelessness prevention fund.

With 'Ask and Act' duties being piloted and due to come into effect before the end of 2028, the focus now is to bridge the gap between aspiration and reality, and 'transform how public services work together and embed housing stability as a shared responsibility'. Frontloading funding in the upcoming Scottish budget will be an essential first step to underpin a successful two-year implementation programme of work.

The findings of this year's Homelessness Monitor Scotland show just how acutely these changes are needed. Temporary accommodation placements are at an historic high, and the Monitor data shows that on any given night, around 1,000 people are sleeping rough in Scotland – more than double the low point reached during the pandemic. The analysis in this report finds that the number of households experiencing the worst forms of homelessness in Scotland now stands at 22,8000, having

risen more than 50% since 2020. Insights from local authorities make it clear that under the current provisions, councils are struggling to find the resource to prioritise prevention, especially for certain groups such as those with complex needs, young people, people facing homelessness following a relationship breakdown, and those with newly granted refugee status. Without effective intervention, the rates of the worst forms of homelessness are projected to remain worryingly high over the coming 15 years.

However, the Monitor findings also illuminate a different path, showing that a meaningful reduction in homelessness in the next couple of years is achievable. A comprehensive package of policy interventions could cut the level of the most severe forms of homelessness almost in half by 2028. Full implementation of the incoming homelessness prevention duties is among the levers forecast to have the most powerful impact on reducing homelessness. These underscore the importance of making sure these incoming reforms are effectively implemented, appropriately resourced, and backed up with political will and leadership.

Although prevention is a key lever, this must be combined with other interventions to achieve the reductions in homelessness that are truly needed. Ending homelessness requires suitable, affordable, settled homes, along with the support for people to maintain their housing. The analysis in this Homelessness Monitor finds that targeted increases in and access to social housing supply, and the national rollout of Housing First would have substantial impacts.

The findings of the Scotland Homelessness Monitor give us reasons to be hopeful: the evidence is clear, and the legal powers needed to move towards ending homelessness in Scotland are already in place. Combining full implementation and resourcing of the new prevention duties with more social housing that is accessible, and support to sustain a settled home can set Scotland on a clear path to ending homelessness for everyone, a goal we believe can be achieved in this lifetime – provided the political will is there.

Matt Downie MBE
Chief Executive at Crisis

Executive summary

The Homelessness Monitor series is a longitudinal study providing an independent analysis of the homelessness impacts of recent economic and policy developments in Scotland and elsewhere in the UK. This sixth Scotland-focused Monitor report provides an account of how homelessness stands in 2026 (or as close to 2026 as data availability allows), and key trends in the run up to 2026. A particular focus is on the recent performance of Scotland's legal rights-based homelessness policy and wider ambitions to mainstream rapid rehousing and preventative approaches in an exceptionally challenging housing market and wider social-economic context and the passing of landmark legislation in 2025 aiming to radically enhance homelessness prevention efforts across and beyond the public sector. Updating and building upon analysis presented in previous Homelessness Monitors, we also project homelessness trends in Scotland into the future under various policy scenarios.

Key points to emerge from this latest analysis are as follows:

- Levels of rough sleeping have doubled since the pandemic low, with estimates suggesting around 1,000 people are street homeless on an average night in Scotland. The proportion of those presenting to local authorities who had slept rough the night before making

their application has also doubled, from 3.6% in 2021/22 to 7.2% in Q1/2 2025/26. Increases have been driven by local authority failures to accommodate those entitled to help, linked to insufficient supply and slow move on from temporary accommodation.

- Almost 34,000 households were assessed as homeless by local authorities in the year to 30 September 2025, a 2% reduction year on year nationally, though 8% higher than in 2019/20. Trends vary across Scotland with as many surveyed local authority areas (10) reporting a decrease as an increase in demand between 2024 and 2025. Easing demand pressures are thought to reflect a focus on prevention and the slight easing of particular drivers of homelessness in some parts of the country, but there has been a substantial increase in presentations from recently granted refugees, especially in Glasgow.
- Most local authorities report only being able to prioritise prevention to some extent under current legal and funding arrangements due to limited funding and a focus on meeting statutory temporary accommodation duties. Local authorities especially struggle to prevent homelessness for people with complex needs, young people asked to leave the family home, those at risk as a result of (non-violent) relationship breakdown, and newly granted refugees evicted from Home Office accommodation.
- At 31 March 2025 total temporary accommodation placements stood at a record high of 17,245 – 6% higher

than a year earlier, and 57% up over six years. Average lengths of stay have increased 27% since 2019/20 to two hundred thirty-nine days. While self-contained social rented housing has continued to be the most common placement type (56% at March 2025), reliance on Bed and Breakfast and 'other' temporary accommodation over which there are quality concerns has continued to increase rapidly. Breaches of the Unsuitable Accommodation Order limiting Bed and Breakfast stays to seven days have increased fourteen-fold to almost 8,000 since 2020/21. Similarly alarming is the substantial spike in local authority failures to accommodate households owed a temporary accommodation duty, which stood at 4,900 in the most recent quarter alone.

- Integrating these official administratively-generated statistics on homelessness with various other data sources offers a means to assess trends in 'core homelessness'. This refers to people in the most severe and immediate forms of homelessness (e.g., rough sleeping, sofa surfing, staying in hostels, refuges or unsuitable forms of temporary accommodation), some of whom are not captured in statutory data. In 2024, core homelessness in Scotland stood at 22,800 households, up 54% (8,000) since 2020, driven by housing market pressures, an extended cost of living crisis, high levels of migration, low levels of social rented lettings and weak economic performance. Rates of core homelessness in Scotland (0.87%) remain considerably lower than in England (1.46%).
- Without additional policy intervention, core homelessness is predicted rise slightly to 23,100 by 2031 before declining to just below 2024 levels in 2041 (to 21,250). A comprehensive programme of measures is modelled

to be capable of reducing core homelessness by 47% by 2028, and 55% by 2036, compared to this baseline projection.

- In the shorter term, the most effective policies for reducing core homelessness would be increased direct allocation of social housing to core homeless households, fuller prevention utilising recently extended duties when fully implemented, and improved welfare benefits including measures to reduce destitution, and indexing of the Local Housing Allowance to inflation. In the longer term, higher economic growth with a better regional balance and increased Housing First provision are also projected to achieve significant reductions. Appropriately targeted new social housing supply is projected to contribute meaningfully to reductions on all time horizons.
- The Scottish Government continues to pursue an exceptionally ambitious homelessness policy agenda focused on prevention, rapid rehousing and joined up responses. The introduction of Ask and Act duties on relevant bodies to help prevent homelessness via the Housing (Scotland) Act 2025 was welcomed as a potentially transformative shift to collective responsibility for homelessness. The key risk is that this leads to increased referrals to local authority homelessness teams, but no meaningful action on the part of relevant bodies. Effective use of the three-year implementation period to develop clear regulations, guidance and training were seen to be essential.
- Prior ambitions to shift to a rapid rehousing model have been partially realised, with a third of local authorities reporting significant progress. Key enablers have been flexible funding deployed locally in line with a clear national strategic vision, but progress

has not been effectively monitored and efforts have been hampered by a challenging housing market context. Housing First provision continues to fall radically short of levels of need, with stakeholders frustrated that the scale of ambition is not being matched by a sustainable approach to resourcing.

- The UK Government decision to abolish the two-child limit and increase Universal Credit standard allowances above inflation will reduce the inadequacy of the social security safety net for some, but the continued Local Housing Allowance freeze remains exceptionally challenging from a homelessness perspective. The Scottish Government has further increased investment in easing the risk of deprivation and destitution resulting from the UK Government social security policy, but the current perilous state of public finances will make maintaining and further expanding these commitments increasingly difficult.
- There is a chronic shortfall in affordable homes in Scotland, likely to be exacerbated by a recent drop in the delivery of social and other affordable homes following the Affordable Housing Supply Programme budget cuts in 2023/24 and 2024/25. The Scottish Government has committed £4.1 billion to support delivery of 36,000 affordable homes by 2029/30, but there are concerns about the capacity of providers to deliver this, let alone the 110,000 aimed for by 2032. In the context of a reduction in turnover in the social rented sector and high demand, over half (57%) of all lettings to new social tenants are now to homeless households.
- There has been a drop in private tenancies available for let and a sharp rise in market rents. Provisions introduced via the Housing (Scotland) Act 2025 aim to improve housing

standards and increase tenant protections, however there is a risk that these reforms may lead to further shrinkage of the private rented sector. As it stands, just 3% of homeless households are rehoused in this tenure.

Trends in homelessness

Rough sleeping

Nearly 2,500 households reported sleeping rough the night preceding their homelessness presentation in 2024/25, nearly double the pandemic low of 2021/22, and up 48% on pre-pandemic level. These trends reflect a doubling in the proportion of homelessness presentations involving people who slept rough the night before their application - up from 3.6% in 2021/22 to 7.2% in Q1/2 2025/26.

Estimates triangulating statutory and survey-based data suggest a nightly snapshot estimate of 1,089 people sleeping rough in Scotland during 2024, again more than double the pandemic low estimate of 480, though numbers are projected to fall somewhat from 2026.

Key drivers of increases in rough sleeping include spikes in local authority failures to accommodate those entitled to temporary accommodation; a problem, in turn, partly reflecting insufficient supply of – and slow move on from – temporary accommodation. Growing demand from newly granted refugee households is also likely to have been a factor.

Statutory homelessness

A total of 33,966 households were assessed as homeless by local authorities in the year to 30 September 2025. This marked a 2% reduction year on year, though was 8% higher than in 2019/20 and 21% above the pandemic low of 2020/21. Results from a local authority

survey show substantial differences in homelessness trends and pressures across different parts of Scotland, with ten areas reporting a decrease and ten an increase in demand between 2024 and 2025. Possible factors explaining the recent stabilisation in homelessness demand include an increased local authority focus on prevention, and a slight easing in some parts of the country of particular drivers of homelessness.

Recent years have seen a substantial shift in the profile of homeless households in Edinburgh, Aberdeen and especially Glasgow, involving significant increases in homelessness involving households newly granted refugee status. By the first half of 2025/26 such applicants accounted for 14.6% of all presenting households across Scotland, up from 5.7% in 2022/23, with a significant proportion of this increased demand involving refugees granted status elsewhere in the UK. This reflects a rapid acceleration in Home Office asylum decisions since 2022 without sufficient provision to help people access accommodation who have been granted status, exacerbated by the uniquely generous statutory homelessness entitlements effective in Scotland and the inability of Scottish authorities to refer such households back to other parts of the UK, as in Scottish law since 2003. Home Office accommodation does not establish a local connection to an area.

Despite policy ambitions to reduce temporary accommodation use and improve standards, by 31 March 2025 total temporary accommodation placements stood at a record high of 17,245 – 6% higher than a year earlier, and 57% up over six years. The number of children in temporary accommodation stood at over 10,000 in March 2025, up 50% in six years. Average lengths of stay now stand at two hundred thirty-nine days, an increase of 27% since 2019/20. While self-contained social rented housing

has continued to be the most common placement type (56% at March 2025), reliance on Bed and Breakfast and ‘other’ temporary accommodation over which there are quality concerns has continued to increase rapidly.

Breaches of the Unsuitable Accommodation Order limiting Bed and Breakfast stays to seven days have increased fourteen-fold to almost 8,000 since 2020/21. Similarly alarming is the substantial spike in local authority failures to accommodate households owed a temporary accommodation duty, which stood at 4,900 in the most recent quarter alone.

In 2024/25, 80% of households (24,000) whose case was closed had secured settled accommodation, up from 76% in 2019/20, a 14% numerical increase. Discharges of duty into social housing, which make up the vast majority of rehousing outcomes, increased by 17% to 23,000 over this same period. A key factor explaining these trends is the increasingly high priority being given to homeless households in some areas in light of the extreme pressures. Edinburgh City Council, for example, has suspended its normal allocation policy to prioritise homeless households in a bid to eliminate non-compliance with statutory duties.

Across Scotland, discharges of duty in the private rented sector have plummeted during this period to just 900 households in 2024/25 – or 3% of all cases closed.

Core homelessness

Integrating official administratively-generated statistics on homelessness with various other data sources offers a means to assess trends in ‘core homelessness’. This refers to people in the most severe and immediate forms of homelessness (e.g., rough sleeping, sofa surfing, staying in hostels, refuges or unsuitable forms

of temporary accommodation), some of whom are not captured in statutory data. In 2024, overall core homelessness in Scotland stood at 22,800 households, with the overall scale of core homelessness having risen by 54% (8,000) from 2020, after a period of relative stability before that. These increases reflected housing market pressures, an extended cost of living crisis, high levels of migration, low levels of social rented lettings, and weak economic performance.

Rates of core homelessness in Scotland (0.88%) were lower than rates in England (1.46), by around 40% in 2024. Within Scotland, rates are generally higher and have tended to increase in the main city regions of the central belt, while rates are lower and tend to have fallen in other sub-regions including the more rural parts of the country.

It is predicted that core homelessness in 2028 will be at a similar level to 2024, and then rise slightly to 23,100 by 2031 before declining gradually back to just below 2024 levels in 2041 (-6.8%, or 21,250). This projection assumes the continuance of economic conditions reflected in current official forecasts and current policies.

Ten different policy mechanisms or changes were tested for their impacts on core homelessness, individually and in combination, using our projection model, looking at short, medium and longer time horizons. In the shorter term, the most effective policies for reducing core homelessness would be increased direct allocation of social housing to core homeless households, fuller prevention utilising recently extended duties, improved welfare benefits including measures to reduce destitution, and indexing of the Local Housing Allowance to inflation.

In the longer term, the largest projected impacts on reducing core homelessness, in addition to the above social housing allocation, prevention, and welfare measures, would include higher economic growth with a better regional balance and increased Housing First provision. Other useful contributions would be made by indexing of the Local Housing Allowance and increased, appropriately targeted new social housing supply.

A comprehensive programme of the recommended measures is shown to be capable of reducing core homelessness by 47% by 2028, and 55% by 2036, compared with what it would have been without any change in policies. Such a scenario may be unlikely to be fully realisable on this timescale given fiscal constraints and other challenges identified in this report. Nevertheless, this scenario could see core homeless 56-58% below the level of 2024. Furthermore, unsuitable temporary accommodation would be down by 93%, rough sleeping would be reduced by 66%, hostels by 66%, and sofa surfing down by 50%.

Economic context

Since the pandemic, the UK has continued to experience slow economic growth and stagnating living standards. The Scottish Government has used higher taxes and windfall payments to help sustain higher per capita spending on services than elsewhere in Great Britain. Alongside continued evolution of the Scottish social security, this has seen some redistribution of income towards poorer households, particularly those with children, reflecting the priority to reduce child poverty. This is one reason that the after housing costs poverty rate, and more especially child poverty, appears to be lower in Scotland than elsewhere in Great Britain.

The economic fallout from the crisis in West Asia, the slowdown in grant funding uplifts from the UK Government, growing pressure on public services, the housing emergency and the failure of public services to recover from the pandemic are further straining already stretched public finances in Scotland at both national and local level. If public finances are to be put on a more resilient footing, the Scottish Government elected in May 2026 will have to make tough fiscal decisions and overcome the barriers to delivering a preventative, collaborative and more efficient approach to the provision of public services.

Abolition of the two-child limit and above inflation increases in Universal Credit standard allowances will reduce the inadequacy of the social security safety net for non-disabled households across Great Britain, but the impact for some will be offset by the Benefit Cap and Local Housing Allowance freeze. In response, the Scottish Government has increased discretionary funding. Local authorities continue to see DHP as an important and helpful tool in resolving and preventing homelessness, and view them as relatively effectively allocated. That said, households do not always appear to know to apply for a discretionary payment and when full mitigation does not apply, the short-term nature of Discretionary Housing Payments and Scottish Welfare Fund funding is ill equipped to tackle the systemic factors that are driving up the numbers of households struggling to afford a home.

Housing context

The housing system has become increasingly precarious as housing costs have out-stripped incomes, increasing inequality and contributing to rising homelessness. Of particular concern is the recent drop in the delivery of social and other affordable homes following

Affordable Housing Supply Programme budget cuts in 2023/24 and 2024/25. This has been compounded by a drop in private tenancies available for let and a sharp rise in market rents (though rental inflation in the past year has dropped below inflation), alongside a reduction in turnover in the social rented sector.

These developments are adding to the chronic shortfall in affordable homes. The most recent research estimates 15,700 social and affordable homes will be required each year over the next five years, with half in East Central Scotland.

Aside from declaring a housing emergency, the Scottish Government has responded by committing £4.1 billion to support delivery of 36,000 affordable homes by 2029/30 (the overall target is 110,000 by 2032). The Housing (Scotland) Act 2025 has also revised property laws aimed at improving housing standards, increasing tenant protections, and preventing homelessness. The expectation is that all elements of the Act will be implemented by November 2028, but the precise date for implementation of specific provisions is not yet known. However, if the introduction of Awaab's law in October 2026 and the potential designation of Rent Control Areas from 2027 lead to further shrinkage of the private rented sector, this will add to the mounting demand pressures faced by social landlords.

Meantime, with over half (57%) of all lettings to new social tenants now going to homeless households, local authorities and Registered Social Landlords have sought to reduce void periods and the number of empty homes in an effort to boost lettings.

Homelessness policy developments and impacts

Scotland's Ending Homelessness Together Action Plan was published in 2018, and updated in 2020.¹ While the overarching framing and core principles of prevention and rapid rehousing still receive widespread support and progress in some areas, there is seen to be an increasing gap between the vision articulated and on the ground delivery, progress is not being meaningfully tracked, and there appears to be no immediate intention to update the now six-year old Plan. In the meantime, the Scottish Housing Regulator judge a third of local authorities to be in or at risk of 'systemic failure' in their delivery of homelessness services and almost half of Scottish local authorities have now declared a housing emergency, with a national housing emergency declared in 2024.

The 2025 Housing Emergency Action Plan included increased investment in acquisitions, Housing First, support for domestic abuse victim-survivors, temporary accommodation pilots, and Discretionary Housing Payments. It has been broadly welcomed, though it is too early to assess its impacts. Local declarations of 'housing emergency' appear to have made little difference in some areas, but achieved corporate buy in and empowered key officials to act in others.

The Scottish Government continues to pursue efforts to improve the quality of temporary accommodation, including via plans to make a revised temporary accommodation standards framework enforceable and ongoing commitment to a Scotland free of dormitory style night shelters. Most local authorities, especially those in Central Belt, view the prospect

of meeting the proposed standards as challenging without significant investment. 'Welcome Centres' were established during the pandemic in Edinburgh and Glasgow to address rough sleeping and avoid the need for night shelters. Now embedded in Edinburgh, this model operates on a smaller scale and without local authority funding in Glasgow, where Scotland's only night shelter continues to run.

Seven years on from their introduction, significant progress implementing Rapid Rehousing Transition Plans is reported in around a third of local authorities. Key enablers have been flexible funding deployed locally in line with a clear strategic vision, but progress has not been effectively monitored, and efforts have been hampered by a challenging housing market context. Key stakeholders call for continued multi-year investment to see the transition through. The scale of Housing First provision continues to fall substantially short of demand, despite continued Government commitment to the model. Stakeholders are frustrated that the scale of ambition is not being matched by a sustainable approach to resourcing.

Most local authorities report only being able to prioritise prevention to some extent under current legal and funding arrangements due to limited funding and a focus on meeting statutory temporary accommodation duties. Local authorities especially struggle to prevent homelessness for people with complex needs, young people asked to leave the family home, those at risk as a result of (non-violent) relationship breakdown, and newly granted refugees evicted from Home Office accommodation.

The introduction of Ask and Act duties on relevant bodies to help prevent homelessness via the Housing (Scotland) Act 2025 was welcomed as a potentially transformative shift to collective responsibility for homelessness. The key risk was seen to be that this led to increased referrals to local authority homelessness teams, but no meaningful action on the part of relevant bodies. Effective use of the three-year implementation period to develop clear regulations, guidance, and training were seen to be essential.

Conclusions

Scotland continues to pursue a highly ambitious policy and legal agenda on homelessness through new provisions extending responsibility for its prevention across the public sector and a strategy (albeit now out of date) focused on a joined-up, upstream, and housing-led response. There are now serious gaps between these ambitions and the reality on the ground, fuelled by exceptional demand pressures, the UK Government social security and immigration policy, and a failing housing system. Judgements of 'systemic failure' in the delivery of homelessness services and declarations of 'housing emergency' now characterise levels of concern about the extent of this disjuncture between ambition and reality.

Key questions looking ahead include whether or not implementation of ambitious reforms on homelessness prevention will deliver the projected reductions in homelessness and avoid increasing pressures on LAs, whether momentum around the broader direction of homelessness policy can be regained, what the impact of reforms to the regulation of the private rented sector will have in practice, and whether social and affordable housing supply targets can be delivered. Future editions of the Scotland Monitor will offer an opportunity to answer these questions, as well as track trends in the socio-economic context in which these ambitions are pursued.

¹ COSLA and Scottish Government (2018) [Ending Homelessness Together: High Level Action Plan](#). Edinburgh: Scottish Government. COSLA and Scottish Government (2020) [Ending homelessness together: updated action plan - October 2020](#). Edinburgh: Scottish Government.

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