Transforming the Private Rented Sector, Greater Manchester

Transforming the Private Rented Sector, Greater Manchester (TPRSGM) Partnership Board

Hosted by Shelter

Final Report

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1. Introduction

1.1 arc4 has been commissioned by the Transforming the Private Rented Sector, Greater Manchester (TPRSGM) Partnership Board to undertake a strategic piece of research on the private rented sector. The research is being funded by The Nationwide Foundation and hosted by Shelter.

1.2 The Nationwide Foundation (TNF) has selected Greater Manchester to pilot a place-based research and development project of the private rented sector. Over the next 3 years TNF will invest £1 million to explore ground-breaking solutions to the issues and barriers that vulnerable people face when private renting in the 10 boroughs.

1.3 The TPRSGM Partnership Board will be responsible for the strategic development of the project and the Test and Learn Grants programme and will work collaboratively with organisations across the combined authorities to identify the issues and challenges vulnerable tenants experience whilst private renting. The project will then seek to find sustainable solutions to these issues.

1.4 The project's ambition is to improve the experience of living in PRS for vulnerable tenants, and have identified 3 project activities:

- A mapping exercise of PRS in Greater Manchester which will give us a better understanding of the current issues, and enable us to gain an up-to-date, accurate and evidenced, understanding of the sector in Greater Manchester.
- A Tenant's Voice programme which will engage with tenants and landlords to co-develop effective change.
- A Test and Learn Grants programme which will be a chance to pilot trail-blazing solutions to the issues that vulnerable tenants face in the private rented sector.

1.5 The findings from the mapping exercise will be integral to the delivery of the project and will be used to develop the project strategy - especially the Test and Learn Grants programme.

1.6 The first element of work uses existing available data about the private rented sector in Greater Manchester to give an overview of what is currently known about the sector. This allows TPRSGM to identify any gaps that require further research and recommendations on which to prioritise. It is a relatively small element of the research and is intended to review what is currently available to answer the key research questions and more importantly set out further research required to complete the work. Further research could be commissioned by the TPRSGM as a stage 2 of this research.

1.7 The specific research questions that have been considered are:

- How many homes in Greater Manchester are privately rented, and what proportion of the housing stock is this? How has this changed over time?
- What condition are the homes in the private rented sector in Greater Manchester? How does this compare to other tenures?
- What are the demographics of private renters in Greater Manchester, how does this compare?

- What are the main issues for private renters in Greater Manchester, especially low-income renters?
- What initiatives are there to support private renters in Greater Manchester? What is lacking?
- How many landlords own stock in the private rented sector in Greater Manchester?
- What are the issues that landlords see in the sector in Greater Manchester?
- What are the main barriers for private renters (especially low-income renters) accessing the PRS in Greater Manchester?
- What is the response from Local Authorities to the lack of social housing? - What are Local Authorities doing to assist with renting in PRS?

1.8 During the research additional questions were considered which were:

- What is the average length of a contractual PRS tenancy, in GM? (Could also look at how do the different areas of GM compare).
- What are the barriers to landlords granting longer tenancies? (e.g. insurance, mortgage restrictions etc.).
- How many landlords have sought possession based on arrears caused by issues with tenants' benefits (e.g. Universal Credit delays).
- What percentage of agencies/landlords accept tenants in receipt of benefits? How many operate a 'no DSS' policy in GM?
- Why do landlords in GM operate 'no DSS' policies?
- What assurances would landlords need to dispense with 'no DSS' policies?

1.9 This report provides an overview of the methodology, the findings from the research; it summarises the evidence found to answer each of the questions as well as identifying the gaps in the research.

2. Methodology

2.1 The methodology has been three-fold:

2.2 A desk top review of published literature and data; this has been accessed through a range of sources, including GM local authorities, the New Economy[1] and the Greater Manchester Combined Authority and Registered Providers. Additional organisations were contacted such as the BRE and Julie Rugg and David Rhodes of York University. All local authorities were contacted to specifically ask for evidence against each question. Those that responded and were able to provide evidence have been included within this document.

2.3 A review of the Greater Manchester arc[4] household surveys; arc[4] is the only major housing consultancy that has continued to routinely offer household surveys as part of a HNA or SHMA study method. With the consent of the local authorities (Stockport, Tameside, Bolton), we have amalgamated recent surveys into a single database. From this we can report on the housing characteristics, needs and aspirations of discrete groups of households.

2.4 A stakeholder consultation (LAs, support organisations including Age Concern and Citizens Advice, Registered Providers etc) was undertaken. This was developed through an on-line survey that identified a number of research questions. This was developed over a relatively short timeframe and response rates were low.

[1] New Economy was established in July 2009 to deliver policy, strategy and research advice to promote economic growth and prosperity in Greater Manchester, working on behalf of the Greater Manchester Combined Authority (GMCA) and the Greater Manchester Local Enterprise Partnership.

3. National Context

3.1 An overview of the National context is taken from the English Housing Survey 2016/17 and provided in appendix A. In summary:

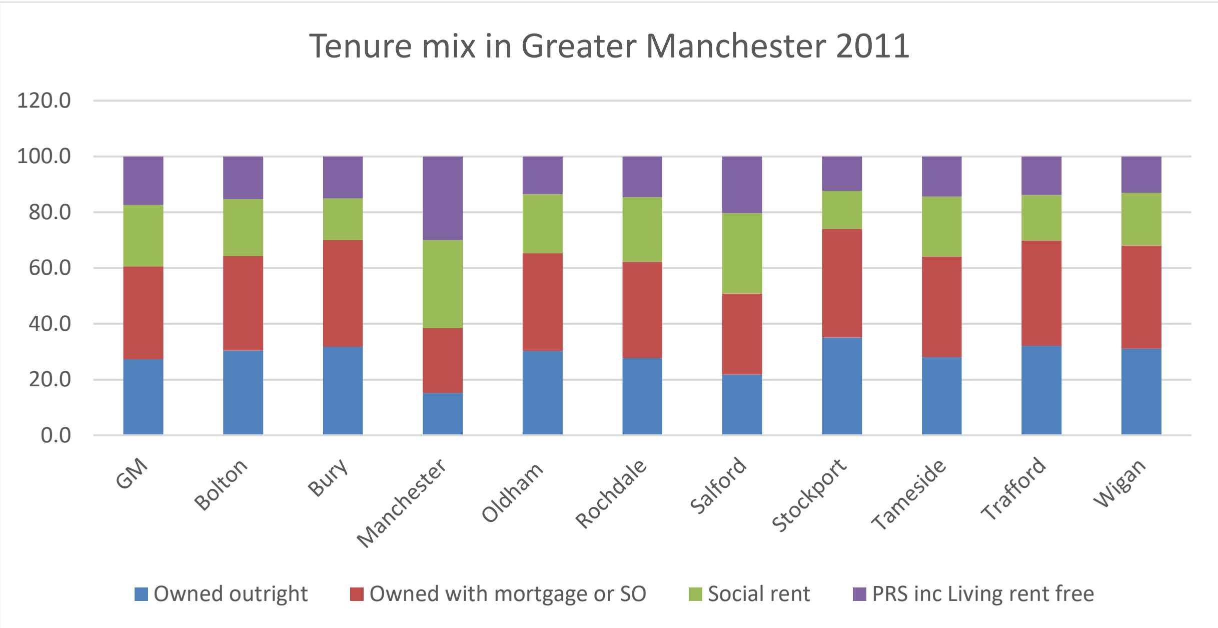
- In 2016, the private rented sector accounted for 4.9 million or 20% of all homes
- The proportion of younger people in this sector has increased over the last decade. About two thirds (68%) of households in the private rented sector had a HRP aged under 45 years.
- Three quarters (74%) of private renters were working, with 63% in full-time work and 11% in part-time work.
- Many households struggle with problems relating to tenure security due to short-term contracts, uncertainty about future rents and rogue landlords who do not guarantee the quality of accommodation; 21% of private renters were dissatisfied with their status as private renters (9% of whom were very dissatisfied with their current status), compared with 10% of social renters and less than 1% of owner occupiers.
- Research suggests that the average estimate of the cost of renting privately is 35% of income, but this figure varies greatly, and a significant number of households do spend a higher proportion.
- Privately rented dwellings were more likely to be older with a third (35%) built before 1919, compared with 21% of owner occupied and 7% of social sector homes. The private rented sector had the highest proportion of non-decent homes (27%) while the social rented sector had the lowest (13%).
- Churn in the private rented sector is higher than in other sectors. The greatest number of household moves occurred within, into or out of the private rented sector.
- Overcrowding was more prevalent in the rented sectors than for owner occupiers.

4. How many homes in Greater Manchester are privately rented, and what proportion of the housing stock is this? How has this changed over time?

4.1 In the report, *The challenge of tackling unsafe and unhealthy housing* http://sabattersby.co.uk/documents/KBReport2.pdf prepared for Karen Buck MP by Stephen Battersby in December 2015, the most difficult question to answer was the number of private rented homes in the local stock. Most responses referred to the latest census data and so only one year's figures were given.

4.2 Owner occupation has been the majority tenure type in Greater Manchester since 1971, increasing in each census year until peaking in 2001. Private renting saw a decline to 1991, then increased to above its 1971 level in 2011. Levels of social renting have been falling since 1981 and in 2011, levels were only slightly higher than that of private renting. 96% of household growth between 2001 and 2011 was in the private rented sector.

Chart 4.1 Tenure mix in Greater Manchester 2011



Census 2011

4.3 According to the 2011 census, 16.1% of households lived in the private rented sector (PRS) in Greater Manchester in 2011, slightly lower than nationally (16.7%). However, the 62.6% increase in 2001-11 outpaced PRS nationally (up 50.8%).[2] Some 181,000 households (or 196,000 including those households living rent free) rented privately in the conurbation in 2011 or .[3] The Resolution Foundation found that home ownership in Greater Manchester dropped from 72% to 58% in 2003-15, described as *'the sharpest fall in home ownership of any major city area in the last decade or so'*. The key driver here is that the PRS in Greater Manchester has more than trebled over that period, from 6% to 20%.[4] Not surprisingly, the 5 million PRS stock nationally in 2016 is the highest in absolute terms since the 1950s, outgrowing social rented sector (SRS) by 2012.[5]

4.4 PRS is spatially concentrated in the city-regional centre and central and south Manchester (Map 4.1)[6]. Whilst it is spatially across Greater Manchester, it is dominant in regional centres.

4.5 The Greater Manchester: Strategic Housing Market Assessment, October 2016 confirms that *'there is a very clear spatial pattern to the areas with high proportions of private rented housing, with them virtually all being in and around the city centre, extending southwards to Didsbury. Within this broad area of major provision, there is a cluster of particularly high proportions of private rented housing in the City Centre ward of Manchester and four adjoining wards, with 65% of housing in the City Centre ward being private rented and 55% in Ordsall in Salford and then other concentrations to the south around Chorlton and extending southwards from Longsight to Didsbury West, which may partly relate to the main locations of students. This results in Manchester having 28% of its households in private rented accommodation, eighteen of the twenty wards in Greater Manchester with the highest rates and the city provides almost one-third of all private rented housing in Greater Manchester. The high concentrations on the western side of the city centre lead to around 19% of Salford's housing being private rented. All of the other districts have reasonably similar levels falling within the range 11-14%.'*

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[2] New Economy, 'Mapping the private rented sector for young professionals and mid incomes families in Greater Manchester', [research study], Manchester: Greater Manchester Combined Authority and Greater Manchester Local Enterprise Partnership, 2015, 4.

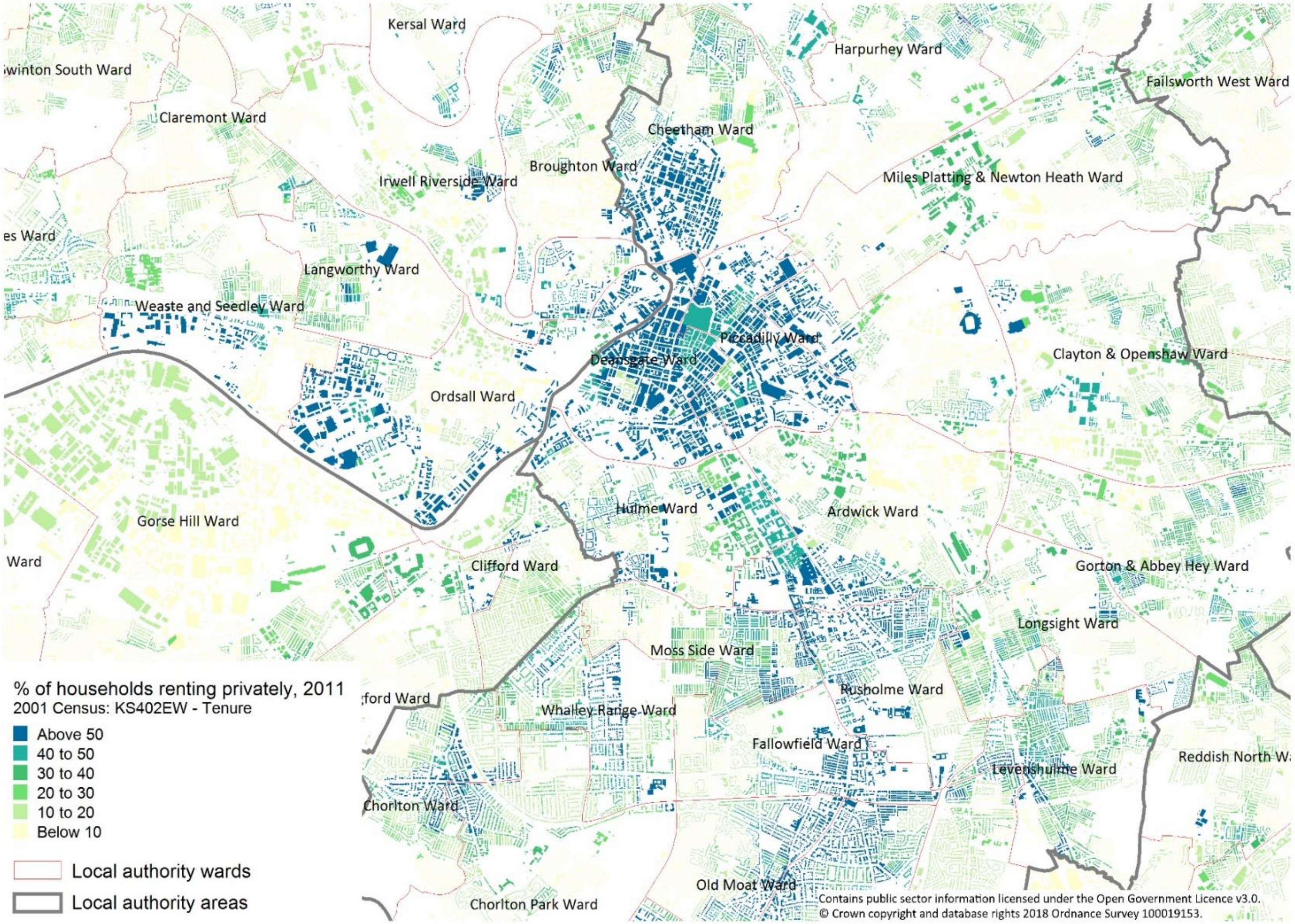
[3] New Economy, 'Mapping the private rented sector', 11.

[4] Resolution Foundation, 'Home ownership struggle hits Coronation Street', [press release, 2 August 2016], <https://www.resolutionfoundation.org/media/press-releases/home-ownership-struggle-hits-coronation-street/>, accessed 5 July 2018. This 20% figure being the only post 2011 data identified in the literature examined, but the basis of the 20% is not outlined in the press release.

[5] Tracy Harrison, 'The PRS in a Regeneration Context', [seminar presentation], *Greater Manchester Housing Providers Private Rented Sector Seminar*, Northern Housing Consortium, 2 July 2018, 70.

[6] Mark Glynn, 'Greater Manchester Private Rented Sector: Personal View', [seminar presentation], *Greater Manchester Housing Providers Private Rented Sector Seminar*, Strategic Head of Place Management, Stockport Council, 2 July 2018, 23.

Map 4.1 PRS in the core of the Greater Manchester conurbation, 2011



4.6 There is no definitive dataset that provides an up to date assessment of the number of homes that are privately rented. However, there are a number of data sources that can be drawn upon to establish a reasonable estimate. The 2011 census is the latest national dataset available for various geographies that shows the number of households living in the PRS.

4.7 There are two methods that could provide a more up to date estimate of the scale of the PRS. Firstly, the census extrapolation method which considers change in the number of PRS dwellings between the 2001 and 2011 census and rolling forward this change. Secondly, the application of the national estimate of PRS using the English Housing Survey.

Census extrapolation method

4.8 In 2001, there were 111,391 households across Greater Manchester living in the PRS (10.7% of households). By 2011, this had increased to 196,429 (17.4%). This represents a change of 76.3% over the 10 years between the censuses and an annualised change of 7.6%. Applying this annualised change trend over the 5-year period 2011 to 2016[7] would result in a further increase of 38.2% households living in the PRS, resulting in a Greater Manchester figure of 273,500 in 2016 representing 23.3% of all households.

4.9 Table 4.1 sets out the number of households in the PRS by local authority district and projections to 2016 based on trends over the period 2001 to 2011.

[7] Analysis runs to 2016 which is the latest year data on dwelling stock and vacancy is available to estimate households living in the PRS

Table 4.1 Trends in number of households in the PRS: census extrapolation method

District	Number of households in the PRS				% change 10 yrs	Annualised change %	% Change 2011-16 (5 yrs)	Multiplier	Total PRS households 2016 (2011 figure x multiplier)
	2001	2011	Change over 10 yrs	Annual change					
Bolton	9,216	17,771	8,555	856	92.8	9.3	46.4	1.464138455	26,019
Bury	6,328	11,768	5,440	544	86.0	8.6	43.0	1.429835651	16,826
Manchester	31,420	61,411	29,991	2,999	95.5	9.5	47.7	1.477259707	90,720
Oldham	7,605	12,174	4,569	457	60.1	6.0	30.0	1.300394477	15,831
Rochdale	7,289	12,816	5,527	553	75.8	7.6	37.9	1.37913294	17,675
Salford	11,518	21,103	9,585	959	83.2	8.3	41.6	1.416087862	29,884
Stockport	9,750	15,056	5,306	531	54.4	5.4	27.2	1.272102564	19,153
Tameside	8,744	13,648	4,904	490	56.1	5.6	28.0	1.28042086	17,475
Trafford	9,573	12,989	3,416	342	35.7	3.6	17.8	1.178418469	15,306
Wigan	9,948	17,693	7,745	775	77.9	7.8	38.9	1.389274226	24,580
GM TOTAL PRS	111,391	196,429	85,038	8,504	76.3	7.6	38.2	1.381709474	273,470
GM TOTAL All Dwellings	1,040,230	1,128,066	87,836	8,784	8.4	0.8	4.2	1.042219509	1,175,692
% PRS	**10.7%**	**17.4%**							**23.3%**

Source: ONS Census 2001 Table SO51; ONS Census 2011 Table KS402EW

National estimate of PRS households

4.10 The latest English Housing Survey 2016/17 reports that 20.3% of households nationally live in the PRS (regional or local authority data are not produced). Applying this to 2016 household estimates results in a total of 236,500 households living in the PRS across Greater Manchester.

Table 4.2 National estimate of PRS households applied to GM	
District	**Applying national PRS estimate**
Bolton	24,211
Bury	16,326
Manchester	43,883
Oldham	18,546
Rochdale	18,069
Salford	22,241
Stockport	25,286
Tameside	20,084
Trafford	19,485
Wigan	28,368
GM PRS TOTAL	**236,498**
GM All households	**1,175,692**
%	**20.1**

English Housing Survey 2016/17; CLG Dwelling Stock Estimates; CLG Vacant Stock Estimates

Comparison of estimates

4.11 Table 4.3 compares the PRS household estimates under both methods to establish a likely range in the number of PRS dwellings. Across GM, the range is between 236,500 and 273,500 with an average of 255,000. This results in a range of between 20.3% and 23.5% of households living in the PRS, with an average of 21.9%.

4.12 There is some degree of variation in outputs by individual districts; with the census extrapolation method yielding lower numbers compared with the national PRS estimate across 6 local authorities and 4 yielding higher numbers. The most notable variance is in Manchester, with a variance of 46,800 households (but the city is undergoing transformational change and the PRS is having a major role in redefining the city centre). In Salford, the variance is 7,600 households and may be an undercount given the growth in the PRS.

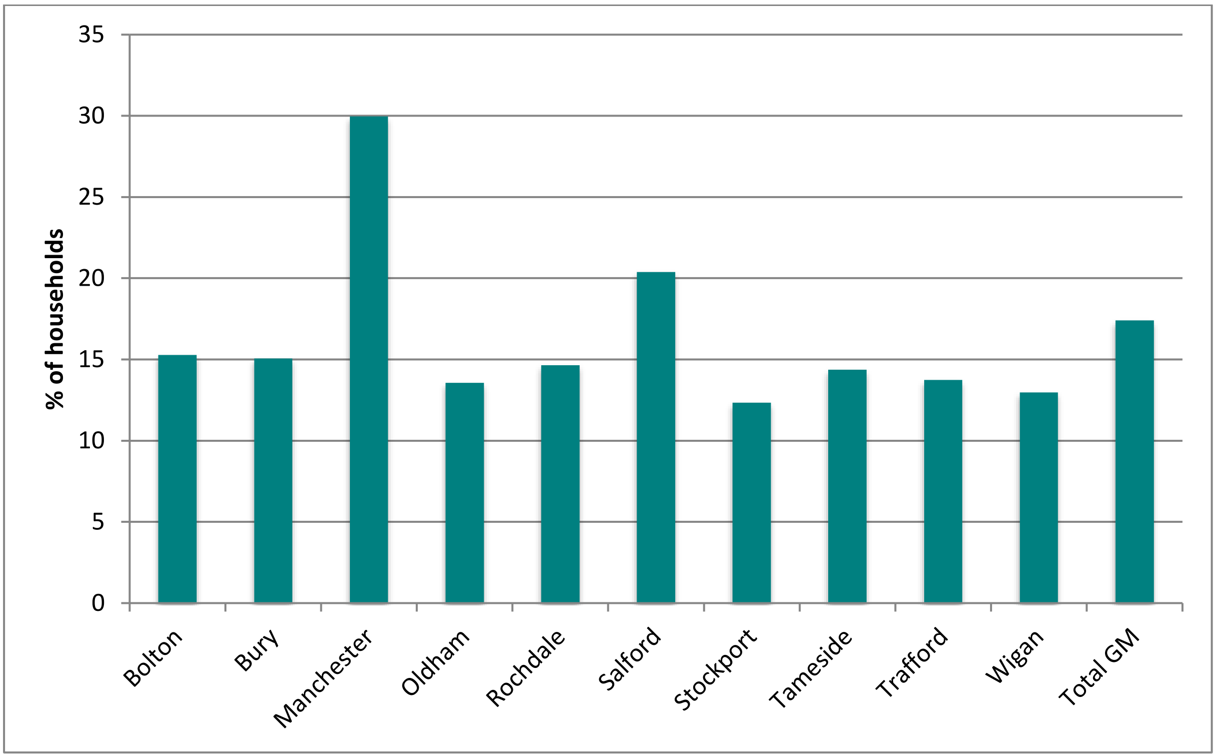
4.13 Table 4.3 also provides an average across both calculation methods and it is recommended that this is taken as a reasonable starting point for estimating the scale of the PRS across Greater Manchester. This results in a slightly higher proportion (21.6%) than the national estimate of households living in the PRS and results in an estimated 255,000 households living in the tenure in 2016.

Table 4.3 Summary of households in PRS under alternative calculation methods

District	Number of households in the PRS				% of households in the PRS		
	Applying national PRS estimate	Applying extrapolation method	Average	All households (all tenures)	Applying national PRS estimate	Applying extrapolation method	Average
Bolton	24211	26019	25114.9	119,264	20.3	21.8	21.1
Bury	16326	16826	16576.4	80,426	20.3	20.9	20.6
Manchester	43883	90720	67301.7	216,174	20.3	42.0	31.1
Oldham	18546	15831	17188.5	91,360	20.3	17.3	18.8
Rochdale	18069	17675	17872.2	89,012	20.3	19.9	20.1
Salford	22241	29884	26062.4	109,562	20.3	27.3	23.8
Stockport	25286	19153	22219.2	124,560	20.3	15.4	17.8
Tameside	20084	17475	18779.4	98,934	20.3	17.7	19.0
Trafford	19485	15306	17395.5	95,983	20.3	15.9	18.1
Wigan	28368	24580	26474.0	139,742	20.3	17.6	18.9
GM PRS TOTAL	**236498**	**273470**	**254984.2**	**1,165,017**	20.3	23.5	21.9
GM All households	**1165017**	**1165017**	**1165017**	**1,045,753**			
%	**20.3**	**23.5**	**21.9**				

4.14 Chart 4.2 illustrates the distribution of the PRS by GM district and shows that 36% of PRS households live in either Manchester or Salford.

Chart 4.2 Distribution of PRS households by District



Census 2011

Feedback from local authorities

4.15 Individual local authorities were contacted for feedback to this question. The detailed responses are in Appendix B and in summary:

- The scale of the sector is primary taken from Census 2011.
- Manchester estimate that 28% of the City's stock is privately rented or 61,000; this is an increase from 55,000 in 2013.
- Salford estimate 23.6% of the stock as being private rented or 19,033. This is sourced through a private housing condition survey 2016.
- Oldham estimate a sector of 20.3% in 2015 compared to 11.2% in 2010; again, this is taken from a private sector housing conditions survey.
- Bolton and Bury have seen the largest increases in the number of overall PRS households).

- In Gorton, In Manchester, PRS accounts for 25% of the market, with 600-plus landlords.[8] Within this profile, policy and market forces are squeezing the Local Housing Allowance (LHA) properties into a smaller, more segregated area[9]. Gentrification can introduce tensions, and falsely masks continued deprivation.[10]
- In Salford, existing properties, many privately owned, are being converted to lets (often as HMOs): housing officers believe another 7,000 may be coming 'on stream' soon.[11] Furthermore, the advent of Build to Rent (BTR) by institutional investors with accelerating flows of international finance is driving the new build market.[12] Silver's data identified 11,453 PRS units across 34 development sites in the city-regional centre, with 5,320 units in Manchester and 6,134 units in Salford, accounting for 44 percent of the total housing units.[13]

[8] Dave Power, 'Tackling Challenging PRS Markets: Gorton, East Manchester', [seminar presentation], *Greater Manchester Housing Providers Private Rented Sector Seminar*, Group Chief Executive, One Manchester, 2 July 2018, 38.
[9] Glynn, 'Personal View', 29.
[10] Andrea Gibbons, 'Precarious lives: Exploring lived experiences of the private rented sector in Salford', [seminar presentation], *Greater Manchester Housing Providers Private Rented Sector Seminar*, SHUSU, 2 July 2018, 13.
[11] Lisa Scullion, Andrea Gibbons, and Philip Martin, 'Precarious lives: Exploring lived experiences of the private rented sector in Salford', [research study], Salford: Sustainable Housing & Urban Studies Unit, University of Salford, 2018, 5.
[12] Jonathan Silver, 'From Homes to Assets: Housing financialisation in Greater Manchester', [working paper], Sheffield: Urban Institute, University of Sheffield, 2018, 7. There are also variety of UK based funds, such as Grainger which promotes itself as 'a leading institutional UK residential investment vehicle' financing over 600 PRS housing units at Clippers Quay, Salford Quays: Silver, 'Homes to Assets', 20.
[13] Silver, 'Homes to Assets', 43.

5. What condition are the homes in the private rented sector in Greater Manchester? How does this compare to other tenures?

5.1 There is no Greater Manchester wide stock condition survey

5.2 In Salford, the enlargement of the PRS had been marked by an increasing polarisation between the high-quality housing at the top end of the market and the much poorer stock at the bottom end: *'what we're finding is that the worst is worse'*[14]. One study identified damp and cold, problems with access, safety concerns, problems with new builds, and limited responses to repairs[15].

5.3 The broad profile of dwelling stock can be derived from the 2011 census. In the absence of detailed stock condition information, the likely stock condition of PRS properties can be explored by considering the profile of dwelling stock and applying national estimates to the data. Energy performance is also a useful indicator of the general condition of stock.

5.4 Table 5.1 summaries the profile of dwelling stock across GM and by local authority based on the 2011 census. Across GM, 34% of PRS dwelling stock is terraced and 29.1% are purpose-built flats. The profile of the PRS varies considerably within GM. Purpose built flats accounted for 47.8% of PRS stock in Salford and 41.4% in Manchester. Terraced housing accounted for 56.3% of PRS in Oldham and 49.2% in Rochdale. Detached houses accounted for 5.8% of PRS stock across GM and was highest in Stockport (7.8%). Semi-detached houses accounted for 27.8% of PRS dwellings in Stockport and 27.7% in Wigan and 21.1% across GM. Converted flats account for 10% of PRS stock and this was highest in Trafford (14.3%), Stockport (13.7%) and Manchester (13.4%).

5.5 The now dated Greater Manchester SHMA estimated 48.6% of PRS properties in Greater Manchester were in non-decent condition in 2008, compared to 35.1% in the owner-occupied sector[16]. Stockport, Tameside and Oldham had the highest levels of PRS unfitness in 2008 and Manchester and Bury the lowest, but this left 12,000 such units in Manchester; over a quarter of PRS unfitness in the conurbation[17].

[14] Scullion, Gibbons *et al.*, 'Precarious lives (report)', 5.
[15] Scullion, Gibbons *et al.*, 'Precarious lives (report)', 15-18.
[16] Deloitte and GVA Grimley, 'Greater Manchester Strategic Housing Market Assessment', [consultancy report], London: Deloitte MCS, 2008, 89.
[17] Deloitte and GVA Grimley, 'Greater Manchester SHMA', 90.

Table 5.1	Profile of PRS dwelling stock						
District	Dwelling type					Total	Base
	House/ Bung Det	House/ Bung Semi	House/ Bung Terr	Flat Purpose Built	Flat Converted		
Bolton	7.5	19.7	44.4	20.8	7.5	100.0	17,771
Bury	7.3	25.3	38.8	21.2	7.4	100.0	11,768
Manchester	4.0	16.8	24.3	41.4	13.4	100.0	61,411
Oldham	6.8	22.0	56.3	9.2	5.8	100.0	12,174
Rochdale	7.2	22.5	49.2	14.9	6.2	100.0	12,816
Salford	4.3	16.5	24.1	47.8	7.4	100.0	21,103
Stockport	7.8	27.8	30.0	20.6	13.7	100.0	15,056
Tameside	5.5	23.9	44.7	18.2	7.8	100.0	13,648
Trafford	6.2	24.8	25.1	29.6	14.3	100.0	12,989
Wigan	7.3	27.7	41.1	17.1	6.8	100.0	17,693
Greater Manchester	5.8	21.1	34.0	29.1	10.0	100.0	196,429

ONS 2011 Census DC4406EW - Tenure by number of persons per room in household by accommodation type

5.6 The English Housing Survey 2015/16 provides an analysis of non-decent[18] dwellings by tenure, dwelling age and dwelling type. Overall, it suggests 28.5% of PRS dwellings are non-decent. Data on non-decency by dwelling type can be applied to PRS dwelling stock to indicate the likely scale of non-decency in the PRS. As data on the age of PRS dwellings is not available from the census, dwelling type data are used. However, specific allowance is made for stock condition in terraced properties: as PRS properties tend to be older pre-1919 terraces, the analysis assumes a non-decency rate of 36.6% across terraced stock.

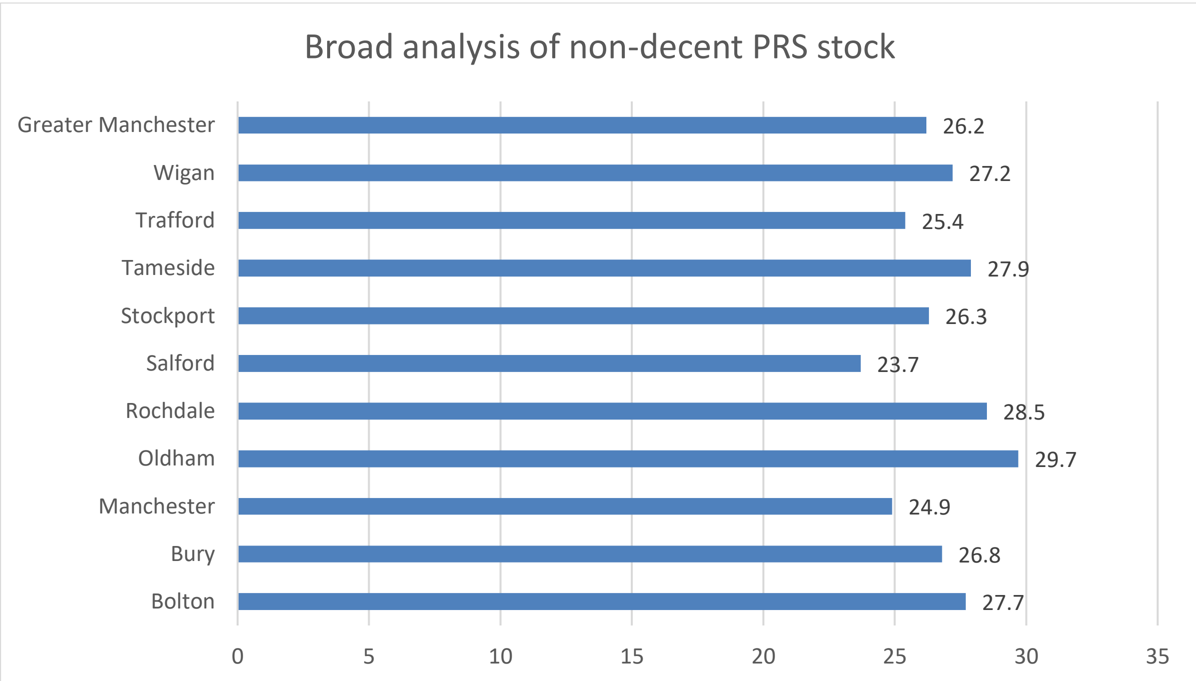
5.7 This broad analysis would suggest around 51,500 dwellings (26.2%) of PRS stock across GM are non-decent.

[18] Defined as https://www.gov.uk/government/publications/a-decent-home-definition-and-guidance

Table 5.2 Broad analysis of non-decent PRS stock.							
District	House/ Bung Det	House/ Bung Semi	House/ Bung Terr	Flat Purpose Built	Flat Converted	Total	% non-decent
% non decent>>>	15.2	20.4	36.6*	17.2	35.7		
Bolton	203	712	2888	637	479	4919	27.7
Bury	130	606	1672	429	311	3148	26.8
Manchester	372	2101	5473	4376	2944	15265	24.9
Oldham	125	544	2507	193	251	3620	29.7
Rochdale	141	587	2308	328	284	3647	28.5
Salford	137	708	1863	1734	555	4996	23.7
Stockport	179	852	1656	533	738	3958	26.3
Tameside	113	665	2231	427	378	3814	27.9
Trafford	121	656	1194	662	663	3296	25.4
Wigan	197	996	2660	522	429	4804	27.2
Greater Manchester	1718	8427	24453	9840	7030	51468	26.2

*36.6% is the EHS figure for pre-1919 dwellings which has been applied to terraced stock across GM rather than use the figure of 22.5% for terraced stock in the EHS to better reflect non-decency in older stock.

Chart 5.1 Broad analysis of non-decent PRS stock



English Housing Survey 2015/2016

Greater Manchester household survey evidence

5.8 arc4 has carried out major household surveys in three Greater Manchester authorities in the past three years: Bolton, Tameside and Stockport. Using data in published reports, these surveys provide a further insight into the households living in the PRS. However, we don't hold data for Manchester which is likely to exhibit different trends.

Dwelling type, size and age

5.9 The profile of dwelling type and size from the household surveys is very similar to the evidence already presented from the census. Regarding property size, the survey evidence indicates that around half (52.6%) are two bedroom, 12.9% are one bedroom or bedsits/studios, 28.6% are three bedroom and 6% have four or more bedrooms.

5.10 Survey evidence provides an insight into the age of dwellings in the PRS and satisfaction with repair. Compared with all tenures, PRS dwellings are more likely to be older (21.7% are pre-1919 compared with 16.9% across all tenures) and also more likely to have been built since 1985 (24% compared with 18% across all tenures). This reflects the polarisation of the PRS towards cheaper terraced stock and the growth of the new-build rental market.

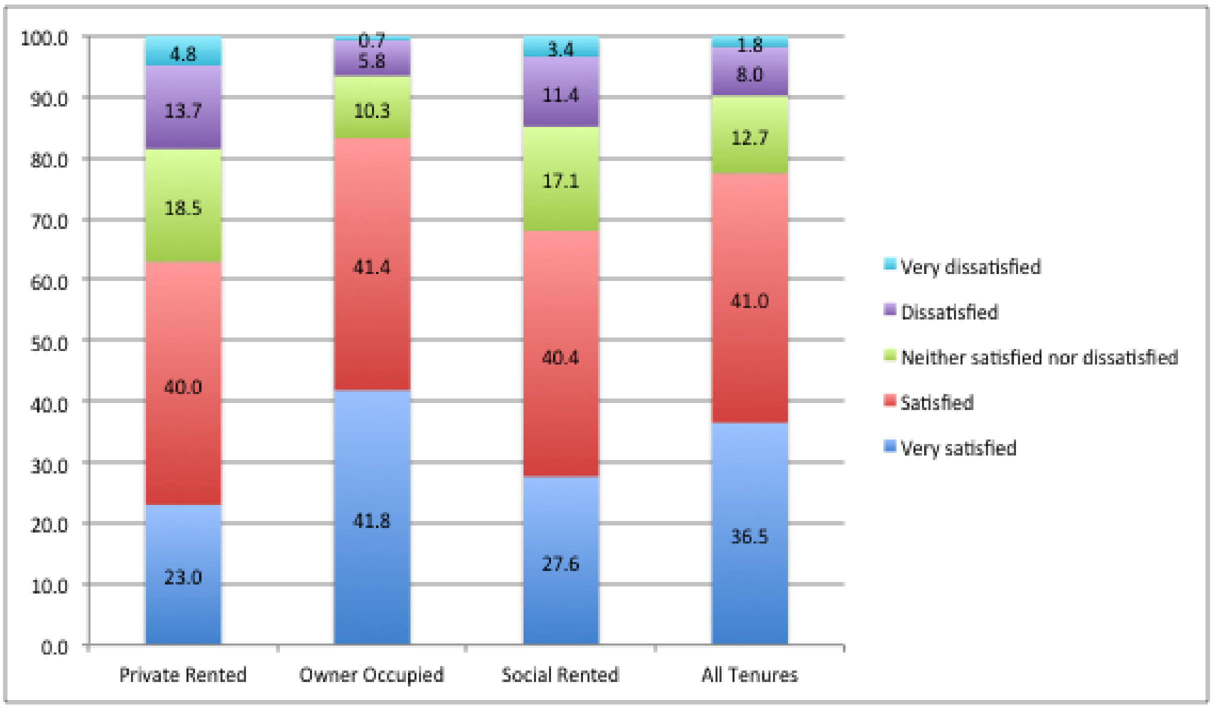
Table 5.3 Age of property by tenure

	Tenure (%)			
Age of property	Private Rented	Owner Occupied	Social rent and intermediate tenure	**All Tenures**
Pre 1919	21.7	19.1	3.5	16.9
1919 to 1944	17.8	22.7	12.7	20.5
1945 to 1964	23.8	19.9	30.9	22.2
1965 to 1984	12.7	22.7	29.0	22.5
1985 to 2004	13.8	12.0	16.6	13.0
2005 onwards	10.2	3.5	7.2	5.0
Total	100.0	100.0	100.0	100.0
Base (Valid responses)	40052	225827	52496	318375

arc4 household surveys in Greater Manchester

5.11 Satisfaction with state of repair was lowest amongst private renters compared with other tenures, with 18.5% dissatisfied or very dissatisfied compared with 9.8% overall.

Figure 5.2 Satisfaction with state of repair



arc[4] household surveys in Greater Manchester

Feedback from local authorities

5.12 Individual local authorities were contacted for feedback to this question. The detailed responses are in Appendix C and in summary:

- Evidence is limited.
- In Oldham the number of non-decent homes in the private rented sector has increased from 3,474 in 2010 to 5,947 in 2015. This compares to the owner-occupied sector which fell from 17,474 to 9,349 during the same period.
- In Manchester there are several references within its policy and strategy documents that reference there are problems with the quality of stock in some market rented locations.
- In Stockport, BRE information confirms 14% of all HHSRS hazards are found in the PRS.
- In Salford, SHUSU reports confirms 'what we are finding is that the worst is worse'.
- In Bolton the SAP rating in the PRS is 58 compared to 60 in the owner-occupied market and 65 in the social rented sector.

6. What are the demographics of private renters in Greater Manchester, how does this compare?

6.1 The private rented sector is growing and becoming more diverse. Over a third of private (38%) and social (35%) renters have dependent children (English Housing survey 2016/17).

6.2 The literature review suggests the market is not homogenous and includes high and bottom end, and niche markets such as students.[19] Much of the research on the sector focuses on low income households, the 'squeezed middle' and 'generation rent'.[20] However, a New Economy study[21] identifies the following PRS housing markets within Greater Manchester:

- Low income
- Students
- BME Households
- Young professionals
- Mid income families
- Short-term transient renters
- High income lifestyle renters
- Older people

6.3 Most people (HHRP) who live in the PRS are under 35 (51% in Greater Manchester and 45% in England and Wales). There was a big rise in 2001-11 (85%, 57,000 households) of families with children.[22] The sector is made up of a mixture of households ranging from single people to families, with 29% of households with dependent children in Greater Manchester. PRS households generally are economically active, and 68% of Greater Manchester PRS households are in work.[23] This compares to 69% of owner occupiers and 37% of social renters in the conurbation.[24] A slightly higher percentage of people in Greater Manchester from a BME background live in the PRS (19%) in comparison to all ethnic groups (17%).[25]

6.4 The Greater Manchester: Strategic Housing Market Assessment October 2016 uses census 2011 data to confirm that Greater Manchester has a smaller private rented sector for over 65s compared to the national figure, at 3.6% compared to 4.4% respectively. The only district to have a higher figure than England is Manchester, where 5.1% of over-65 properties are in the private rented sector.

[19] Glynn, 'Personal View', 25.
[20] New Economy, 'Mapping the private rented sector', 11.
[21] New Economy, 'Mapping the private rented sector', 44-45.
[22] Glynn, 'Personal View', 23.
[23] New Economy, 'Mapping the private rented sector', 5.
[24] New Economy, 'Mapping the private rented sector', 14.
[25] New Economy, 'Mapping the private rented sector', 46.

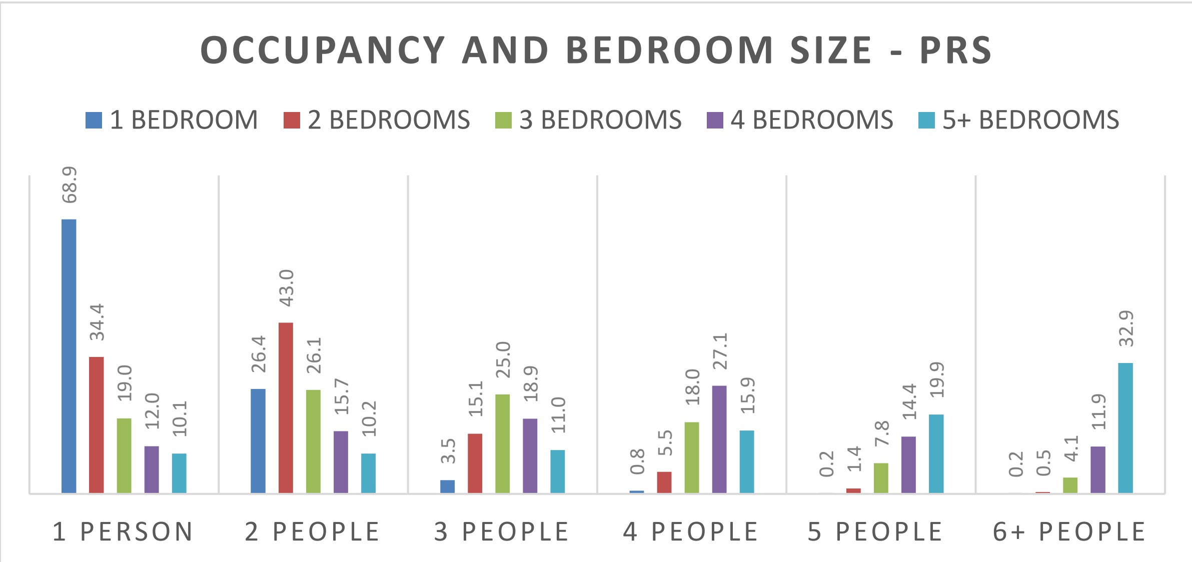
2011 census profile

6.5 The 2011 census provides general information on the demographics of private renters in Greater Manchester. This can be further supplemented with local household survey information where it is available and published.

6.6 This section will examine occupancy, household composition and a more detailed view of the profile of those who occupy private rented accommodation within Greater Manchester.

6.7 Chart 6.1 considers the occupancy of dwellings by bedroom size across the PRS

Chart 6.1 Occupancy and bedroom size



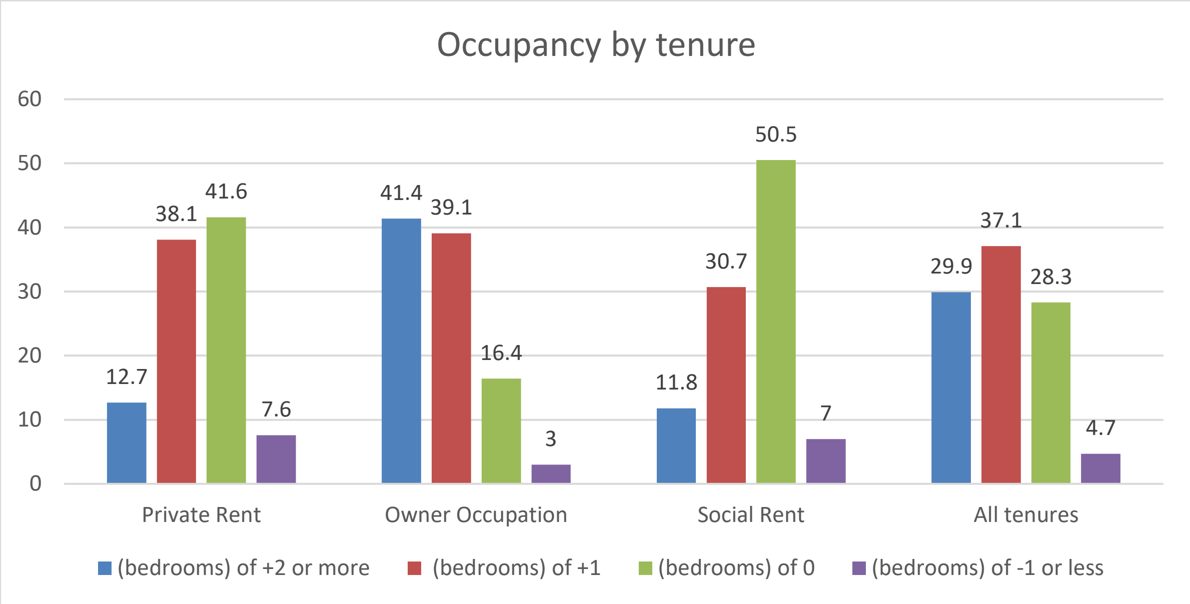
Source: Census 2011

6.8 In relation to over-occupancy in the private rented sector, 4.1% of properties containing 3 bedrooms are occupied by 6 people or more and 0.2% are living in a property containing 2 bedrooms.

6.9 Examining under-occupation also, the data suggests that in properties containing 5 bedrooms or more, 10.1% are occupied by a single person only and 10.2% are occupied by 2 people. Around 12.0% of single occupants are living in 4-bedroom properties within the private rented sector.

6.10 Chart 6.2 below shows the overall occupancy rating within Greater Manchester by Tenure.

Chart 6.2 Occupancy by tenue



Census 2011 Table LC4108E

6.11 Over occupancy within Greater Manchester is highest in the private rented sector (7.6%), closely followed by the social rented sector (7.0%). Under-occupation is highest within the owner occupation sector, which is expected.

Ethnicity

6.12 Table 6. 1 shows the ethnicity of those within the private rented sector.

Table 6.1 Ethnicity by tenure

Tenure	Ethnicity by Tenure (%)						
	White: English/Welsh/ Scottish/Northern Irish/British	White: Irish	White: Other White	Mixed/ multiple ethnic group	Asian/Asian British	Black/African /Caribbean/ Black British	Other ethnic group
Private Rent	72.1	1.6	7.1	2.3	10.5	41	2.3
Owner Occupation	88.0	1.8	1.4	0.8	6.4	1.2	0.4
Social Rent	82.1	2.2	2.2	2.3	4.5	5.5	1.1
All tenures	83.9	1.8	2.6	1.4	6.7	2.6	0.9

Source: Census 2011 Table LC4201EW

6.13 The private rented sector contains the highest proportion of ethnic minority households (27.9%). The highest BME group is Asian/Asian British (10.5%), compared with just 4.5% in the social rented sector.

Table 6.2 Household composition by tenure

Household type	Tenure (%)			
	Private Rent	Owner Occupation	Social Rent	All tenures
One-person household: Aged 65 and over	5.3	11.6	18.1	12.0
One-person household: Other	29.2	14.4	29.6	20.3
One family only: All aged 65 and over	1.2	9.2	3.5	6.6
One family only: Married or same-sex civil partnership couple: No children	4.7	14.5	4.3	10.6
One family only: Married or same-sex civil partnership couple: Dependent children	8.7	18.6	6.5	14.2
One family only: Married or same-sex civil partnership couple: All children non-dependent	1.1	8.0	2.2	5.5
One family only: Cohabiting couple: No children	10.4	4.9	2.5	5.3
One family only: Cohabiting couple: Dependent children	6.0	4.1	5.2	4.7
One family only: Cohabiting couple: All children non-dependent	0.3	0.7	0.6	0.6
One family only: Lone parent: Dependent children	14.3	4.2	16.1	8.6
One family only: Lone parent: All children non-dependent	2.2	3.9	5.5	4.0
Other household types: With dependent children	2.8	2.6	2.9	2.7
Other household types: Other (including all full-time students and all aged 65 and over)	13.7	3.2	3.1	5.0
Total	100.0	100.0	100.0	12.0

Source: Census 2011 Table LC4104E

6.14 The main household group to occupy private rent within Greater Manchester are single person households aged under 65 (29.2%) compared with just 14.4% in owner occupation. Other household groups include lone parents with dependent children

(14.3%), other household types (students and all aged 65 and over), (13.7%) and cohabiting couple, no children (10.4%).

6.15 The following data table highlights the health of occupants by the different tenures. The highest proportion of people in bad or very bad health live in the social rented sector. In comparison, the healthiest occupants live in the private rented sector (which reflects the younger age profile of private rented tenants).

Table 6.3 Health by tenure

Tenure	Health by Tenure (%)			Total
	Good Health	Fair Health	Bad or very Bad Health	
Private Rent	85.5	9.7	4.8	100.0
Owner Occupation	82.2	12.9	4.9	100.0
Social Rent	66.8	19.5	13.7	100.0
All tenures	79.8	13.6	6.6	100.0

Source: Census 2011 Table DC3409EW

6.16 Examining data on economic activity within each tenure group shows that the tenure with the highest proportion of working adults is owner occupation (69.0%), closely followed by private rent (67.9%). Retirement is at a very low level in the private rented sector (8.1%) compared with the other tenures.

Table 6.4 Economic activity by tenure

Economic activity	Tenure (%)			
	Private Rent	Owner Occupation	Social Rent	All tenures
Economically active: In employment: Total	67.9	69	37.1	61.9
Economically active: Unemployed: Total	7.3	1.2	8.9	4
Economically inactive: Retired	8.1	26.7	27.3	23.6
Economically inactive: Student (including full-time students)	4.1	0.2	1.3	1.1
Economically inactive: Looking after home or family	4	0.5	5.2	2.1
Economically inactive: Long-term sick or disabled	5.8	1.6	16.3	5.6
Economically inactive: Other	2.8	0.7	3.8	1.8
Total	100	100	100	100

Source: Census 2011 LC4601EW

6.17 The following data table shows the occupation groups of household reference person by tenure. It is interesting to note that the occupation profile of household reference people living in the private rented sector is broadly comparable with the overall population. Within the private rented sector, the main occupation group is managerial, professional and associate occupations (40.1%), compared with 41.2% across all tenures.

Table 6.5 Occupancy of Household reference person by tenure

Occupation Group	Occupation by Tenure (%)			
	Private Rent	Owner Occupation	Social Rent	All tenures
1. Managers, directors and senior officials	9.3	13.3	4.3	11.4
2. Professional occupations	17.5	19.9	5.5	17.5
3. Associate professional and technical occupations	13.3	13.3	5.9	12.3
4. Administrative and secretarial occupations	9.7	10.0	8.8	9.8
5. Skilled trades occupations	10.2	13.6	10.9	12.6
6. Caring, leisure and other service occupations	9.2	6.5	15.0	8.1
7. Sales and customer service occupations	10.2	5.5	11.4	7.2
8. Process, plant and machine operatives	7.8	10.2	13.8	10.2
9. Elementary occupations	12.9	7.5	24.4	10.8
TOTAL	**100.0**	**100.0**	**100.0**	100.0

Source: Census 2011

Economic activity and household income

6.18 Economic activity data from the household surveys (taken from Tameside, Bolton and Stockport) is very similar to that reported in the 2011 census. Overall, 66.1% of PRS household reference people were in employment, 8.9% were retired, 9.5% were permanently sick/disabled, 6% were unemployed, 6.2% were full-time carers/ looked after the home and 3.3% were in full-time education or training.

6.19 The income profile of PRS households is compared with other tenures in Table 6.6. This shows that the PRS accommodates a range of income groups, with 50% earning between £13,000 and £26,000 (compared with 38.9% across all tenures). One-quarter of households received less than £13,000 (compared with 17% across all tenures and 57.6% across affordable tenures) and 24.4% received at least £26,000 (compared with 44.1% across all tenures). This indicates that the PRS is serving a range of income groups across Greater Manchester.

6.20 Around 75% of occupants living in private rent earn below the UK average household income bracket of £27,300[26] compared with around 97% of households living in social rented/intermediate tenure and around 45% of households in owner occupation.

Table 6.6 Household income by tenure

Annual gross household income (£)	Household Income by Tenure (%)			Total
	Private Rent	Owner Occupied	Social Rent/ Intermediate Tenure	
Up to £13,000	25.4	8.6	57.6	17.0
£13,000 up to £26,000	50.2	36.8	39.6	38.9
£26,000 or more	24.4	54.6	2.8	44.1
Total	100.0	100.0	100.0	100.0

Source: arc[4] household surveys within Greater Manchester (overall average)

Feedback from local authorities

6.21 Individual local authorities were contacted for feedback to this question. The detailed responses are in Appendix D and in summary:

- There is very little evidence on demographics other than census information for local authorities.
- In Salford the Private House Condition Survey reports vulnerable tenants at 26% against 29% for RPs and 24% for owner occupiers. 35.2% who identify as Asian live in the PRS, 47.8% who identify as black live in the PRS, 28.8% who identify as other live in the PRS and 23% who identify as white live in the PRS. Only 1.5% of all households that rent their property privately earns more than £5k per month compared to 4.3% who own their home outright. Figures are gross.
- In Oldham 42% of households living in the PRS are 16-34 compared to 11% in the owner-occupied sector and 21% in the social rented sector. 61% of households in the PRS are employed compared to 69% in the owner-occupied sector

[26] ONS Living Costs and Food Survey 2016/17

7. What are the main issues for private renters in Greater Manchester, especially low-income renters?

7.1 Nationally, this is a well-documented subject but there is not a definitive evidence base for Greater Manchester. Instead the sources that we have been able to find include the results from a survey commissioned by Shelter; YouGov survey of private renters living in Greater Manchester, February/ March 2017. The data collection was carried out online. The figures relate to 312 responses from respondents living in Greater Manchester. The headlines show:

- 17% of current private renters surveyed in GM said they had a badly done repair in the last 12 months, a third had within last 5 years;
- 1 in 15 GM renters surveyed had rented from a rogue landlord in last 12 months, 1 in 6 in last 5 years;
- 29% of current renters surveyed in GM had had a repair delayed unnecessarily or not done in the last 12 months;
- Nearly two thirds (64%) of renters surveyed in Greater Manchester said that they wanted to buy a home but were unable to save anything towards a deposit;
- 1 in 6 GM renters surveyed said they had put off having children or more children because they were renting;
- 29% of GM renters surveyed agreed that they had lived in a rented home that harmed their health, in the last 5 years, the same percentage said there had been an impact on a child's health;
- Well over half (56%) of Greater Manchester renters surveyed agreed that they had expected to be a homeowner by now;
- Over a third of GM renters surveyed agreed that they had been worried about losing their current home, this year;
- 8% of GM renters surveyed had vermin/ pest problems in last 12m;
- 31% of GM renters surveyed had damp/ mould problems in last 12m;
- 16% of GM renters surveyed had electrical hazard problems in last 12m;
- 40% of current GM renters surveyed had experienced one of the three problems with conditions above;
- 7% confirmed that a landlord/agent had entered their home without notice/chance to give permission;
- 4% had been abused/threatened/harassed by a landlord or letting agent;
- 5% reported paying a deposit that was not protected in a Government scheme;
- 12% of GM renters surveyed had experienced one of a range of 6 things that are normally illegal, in the last 12 months (deposit not protected/ harassed or

assaulted/ entry without permission/ utility cut off for no good reason/ discrimination/ illegal eviction).

7.2 The detailed results of the YouGov survey are illustrated in Appendix E.

7.3 Mapping the private rented sector for young professionals and mid incomes families in Greater Manchester, was a report undertaken by the New Economy. The report provided an overview of the private rented sector (PRS) within Greater Manchester and focused on the housing aspirations and private rented sector housing experiences of young professionals and mid-income families living within the sector. The findings are based on a review of the literature on the private rented sector, a survey of over 360 private renters across GM and the results of three focus groups held in Manchester and Oldham. The response rate to the survey (369) provides a confidence level of 95% +/-5.09% based on a population of 76,000 young professionals in Greater Manchester, if the population of all PRS households is used the confidence level is 95% +/-5.1%.

7.4 The main issues from the survey respondents were in relation to poor quality accommodation which may have been due to lack of maintenance or to do with the initial property design and build. A number of respondents noted the poor behaviour of landlords. Only six respondents noted that they had experienced a 'rogue landlord'. However, more respondents noted dissatisfaction with their landlord, with a further 25 respondents noting specific landlord issues. These issues were generally in relation to maintenance and repairs.

7.5 A further landlord issue highlighted in the stakeholder interviews, focus groups, survey and literature is the lack of professionalism within the sector. Respondents to the survey noted landlords were not always aware of their obligations for example *"Landlord has been fantastic in fixing problems but I do have concerns his workmen access the property to access the roof when we are out without our permission" (Female 25-34).*

7.6 The focus groups also highlighted a lack of knowledge of tenancy terms and conditions from both the landlord and tenant perspective.

7.7 Cost was highlighted by both the survey respondents and focus groups as a consideration when renting

7.8 These issues will be creating increased pressure on services. Younger households have been at the sharp end of far-reaching changes in access to housing finance, in the impact of austerity, of welfare cuts policy measures, and in structural shifts in the labour market.27 Service providers in the Salford report (Precarious Lives) that whereas historically, most clients had come from traditionally 'deprived neighbourhoods', now various services were being approached for support from PRS residents in every area of the borough.[28]

[27] Ben Pattison and Kesia Reeve, 'Access to homes for under-35's: The impact of Welfare Reform on Private Renting', [research study], Sheffield: Centre for Regional Economic and Social Research, Sheffield Hallam University, 2017, 1.
[28] Scullion, Gibbons *et al.*, 'Precarious lives (report)', 6.

7.9 The literature highlights the concern that regulation depends on tenants and their ability to influence change. The reality of insecurity is central to the research evidence.[29] Insecurity of tenure is a core characteristic of the current market, with shorter tenancies, often rolling monthly contracts or six months maximum, being common.[30] This insecurity relates not only to the fixed-term nature of tenancies, but also the power that landlords and agents have in terms of selling properties or changing ownership.[31] Economically active or higher-income renters have choice: landlords either buck-up or tenant moves on; landlords compete to attract them; so a lower risk in complaining to council and seeking enforcement.[32] Poorer tenants, or those reliant on benefits can't easily leave and use limited buying power elsewhere.[33] Demand for housing is such that the landlord can evict without reason and easily re-let.[34] Eviction from a private tenancy is the biggest cause of homelessness.[35] Sharp practices reported in Salford include the case of a landlord inserting a clause in the tenancy agreement to increase the rent by £50 every three months, while another service provider described a case where a landlord was charging interest on arrears.[36]

Feedback from local authorities

7.10 Individual local authorities were contacted for feedback to this question. The detailed responses are in Appendix F and in summary the issues included: Reputation of the sector, security of tenure/Power imbalances, condition of property, concentrations of poor quality stock, poor quality landlords, vulnerability, affordability, lack of supply and choice, balance of property mix in PRS, response to repairs, social divisions and welfare reforms /benefits cap. It would useful to note the

8. What initiatives are there to support private renters in Greater Manchester? What is lacking?

8.1 This question has been considered through both literature reviews and a stakeholder survey.

8.2 The literature review touches on new legislation: rent repayment orders, FPNs, and banning orders.[37] Recent new powers mentioned for Manchester from April 2018 include: Civil Penalty Notices (structure agreed across GM); Banning Orders; Rogue Landlords Database; Rent Repayment Orders; and Letting Agent Redress Scheme.[38]

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[29] Harrison, 'PRS in Regeneration', 71.
[30] Scullion, Gibbons *et al.*, 'Precarious lives (report)', 6.
[31] Scullion, Gibbons *et al.*, 'Precarious lives (report)', 24; Gibbons, 'Precarious Lives (presentation)', 10.
[32] Glynn, 'Personal View', 27.
[33] Glynn, 'Personal View', 27; Gibbons, 'Precarious Lives (presentation)', 12.
[34] John Dunn and Jonathan Drake, 'A Social Lettings Agency: The Answer to Your Prayers?', [seminar presentation], *Greater Manchester Housing Providers Private Rented Sector Seminar*, InHouse and Salix, 2 July 2018, 51.
[35] Glynn, 'Personal View', 27.
[36] Scullion, Gibbons *et al.*, 'Precarious lives (report)', 7.
[37] Glynn, 'Personal View', 32.
[38] Cobane, 'Utilising Local Authority Powers', 106. See slide for further elaboration.

Tracy Harrison, 'The PRS in a Regeneration Context', [seminar presentation], *Greater Manchester Housing Providers Private Rented Sector Seminar*, Northern Housing Consortium, 2 July 2018, 80.

8.3 Importantly, enforcement and related resources have been severely cut under austerity (e.g. non-Adult Social Care spend reducing by 32% since 2009/10 and the freeze on housing benefit).[39] Thus many services previously offered by supported housing no longer exist (e.g. support for people leaving custody).[40]

8.4 In Salford, Selective Licensing schemes are viewed as having a positive impact, albeit with recognition that there are limits to what could be enforced.[41] Selective Licensing areas in Manchester are selected in places affected by low housing demand, poor property conditions, transiency, deprivation, significant and persistent ASB problem or high crime (for example a locality in Moss Side and Rusholme designated).[42] Selective Licensing in Manchester secured significant landlord engagement, data on stock and area conditions, promotion of Manchester Rental Pledge and national accreditation schemes, with an example of pressure on a persistent problematic landlord to sell stock and change management arrangements.[43]

8.5 A Salford study found reduction in funding accelerated partnership working, with providers moving towards an ‘enforcement hub approach’, which sought to bring regulatory functions together across services like GM Fire and Rescue. Other examples included bringing partners from areas such as welfare rights, housing advice and

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[39] Glynn, 'Personal View', 32.
[40] Scullion, Gibbons *et al.*, 'Precarious lives (report)', 8.
[41] Scullion, Gibbons *et al.*, 'Precarious lives (report)', 8; Glynn, 'Personal View', 32.
[42] Cobane, 'Utilising Local Authority Powers', 101.
[43] Cobane, 'Utilising Local Authority Powers', 102.

homelessness service to share information and devise practical measures. There was an acknowledgement that data sharing across partners in Salford could be better.[44]

Feedback from local authorities

8.6 Individual local authorities were contacted for feedback to this question. The detailed responses are in Appendix G and in summary the issues included: Rebranding of the sector, promoting self-regulation, target and focused enforcement interventions, improving the role of partners and relationship between LA, private landlords and letting agents, better information, deposit schemes, energy efficiency advice, private landlord's forum, selective licensing, enforcement actions and private sector leasing schemes.

Other initiatives reported to arc4

Greater Manchester Housing Providers ethical letting agency

8.7 There is a stark statistic that confirms that there are 84,000 households currently on the waiting list for social housing (Generation Rent 2017).

8.8 Within this context, the Greater Manchester Housing Providers (GMHP) are considering establishing a partnership that builds on its existing relationships with landlords in the private rented sector. GMHP already delivers approximately 800+ private sector properties that are now available for allocation. These services are currently operating at different scales in 6 of the GM boroughs (Bolton, Salford, Stockport, Wigan, Tameside and Oldham). The partnership is considering expanding the scale of work.

[44] Scullion, Gibbons *et al.*, 'Precarious lives (report)', 8.

9. How many landlords own stock in the private rented sector in Greater Manchester?

9.1 The number of landlords in Greater Manchester has not been identified in the literature reviewed. Local studies tend to cite national research by Shelter (2012) indicating the PRS housing stock is mainly owned by small-scale landlords with less than four properties.[45] Thus the New Economy study's stakeholder interviews and local intelligence suggests the pattern of landlords across Greater Manchester reflects the national pattern with a concentration of small scale landlords, using letting agencies to manage their properties.[46]

9.2 However, there has been growth in commercial landlords especially within Manchester, Salford and Trafford.[47]

9.3 Local authorities were unable to add any additional information to this question.

9.4 There is data from the land registry which has sales to non-private individuals, buy to let and repossession.

[45] Glynn, 'Personal View', 23.
[46] New Economy, 'Mapping the private rented sector', 9.
[47] New Economy, 'Mapping the private rented sector', 10.

10. What are the issues that landlords see in the sector in Greater Manchester?

10.1 Whilst there is data nationally, the focus is not at a Greater Manchester level.

10.2 A CRESR study noted that landlords are a diverse group, whose experiences and motivations are poorly understood. Policy decisions about private renting are often made with little or no understanding of how landlords might respond.[48] Meanwhile, improved tenancy management measures and probationary tenancies make it easier for registered providers to exclude challenging tenants.[49] Concentrations of vulnerable residents bring significant neighbourhood management challenges.[50] Vulnerable tenants are nevertheless displaced into PRS; 'managed by least able': amateur landlords, lacking understanding of legal framework or connections to wider support and no market incentive to act appropriately.[51] The New Economy study also highlighted that the management and expertise of some landlords and lettings activities is questionable. Stakeholders interviewed noted that the lack of knowledge of rights and responsibilities by some landlords led to issues around housing management in areas with a concentration of PRS properties.[52]

10.3 A 2017 study which surveyed landlords and lettings agents about letting to under-35s identified this group as a major source of demand but affected by welfare cuts. Two-thirds were not willing to let to Housing Benefit/Universal Credit (HB/UC) claimants because of difficulty in managing the accommodation and fears about financial loss or risk of breach in tenancy conditions.[53] An NLA survey found 38% of landlords have experienced tenants on universal credit going into rent arrears in the past 12 months.[54]

10.4 Policy factors dissuading landlords from under-35s letting include: direct payments of Universal Credit (48%); caps on Local Housing Allowance rates (41%); four-year freeze on Housing Benefit payments to working age claimants (40%); increased regulation, such as immigration checks, licensing and Article 4 directions (38%); and taxation changes such as Mortgage Interest Relief/Section 24 (30%).[55] Landlords' preferred responses for increasing lettings to under-35s would be: reversing tax changes or providing tax relief for longer tenancies; bond/rent deposit schemes; better administration and direct payment of HB/UC.[56]

Feedback from local authorities

10.5 Individual local authorities were contacted for feedback to this question. The detailed responses are in Appendix H and in summary the issues included:

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[48] Pattison and Reeve, 'Access to homes', 2.
[49] Glynn, 'Personal View', 30.
[50] Glynn, 'Personal View', 30.
[51] Glynn, 'Personal View', 30.
[52] New Economy, 'Mapping the private rented sector', 10.
[53] Pattison and Reeve, 'Access to homes', 6; Glynn, 'Personal View', 25.
[54] Tom Simcock, 'Welfare Reform and Universal Credit: The impact on the private rented sector', [research study], Sale: Private Renting Evidence, Analysis and Research Lab, Residential Landlords Association, 2017, 4.
[55] Pattison and Reeve, 'Access to homes', 8.
[56] Pattison and Reeve, 'Access to homes', 16.

- Welfare reforms and the impact they are having on landlord income; the ever-tightening rules regarding administration fees, deposit protection and section 21 rules
- Rent arrears and property damage
- Selective licensing; often not viewed positively by landlords.

11. What are the main barriers for private renters (especially low-income renters) accessing the PRS in Greater Manchester?

11.1 Consistent under delivery of new homes compared to local housing need is forcing up house prices and rent levels.[57] Rents in Greater Manchester are forecast to increase by 20% in 2017-21.[58] Moreover, a Salford study found that private rents in the most deprived neighbourhoods are paradoxically often the least affordable, because while the rates may have been lower than more affluent areas, the gap between income and rent is much greater.[59] Local Housing Allowance (LHA) has been capped and not increased in line with rental inflation.[60] The Salford report also identified severe impacts from welfare benefit cuts (so-called Welfare Reform) including LHA; the 'bedroom tax'; the under 35 rule; and the ending of direct payment of Housing Benefit to landlords.[61]

11.2 Fees and deposits constitute a further barrier.[62] Examples in Salford include paying between £70 and £300 in initial fees to an agent with one couple paying £250 each.[63] Research indicates BME communities are at a disadvantage, particularly with regard to knowing their rights as tenants.[64] Fees, deposits and rent in advance are prohibitive for many and/or impact of benefit freezes and landlords and agents routinely exclude benefit recipients.

arc[4] data analysis

11.3 arc[4] has a research contract with Zoopla. This dataset provides data for properties coming onto the market and subsequently let at any geography across England and Wales. Whilst the dataset has a number of limitations in so far as it cannot provide details of property let through word of mouth for example, often where lower value PRS is offered, but it is a 'rich' source of data from which a number of issues can be explained.

Access to property

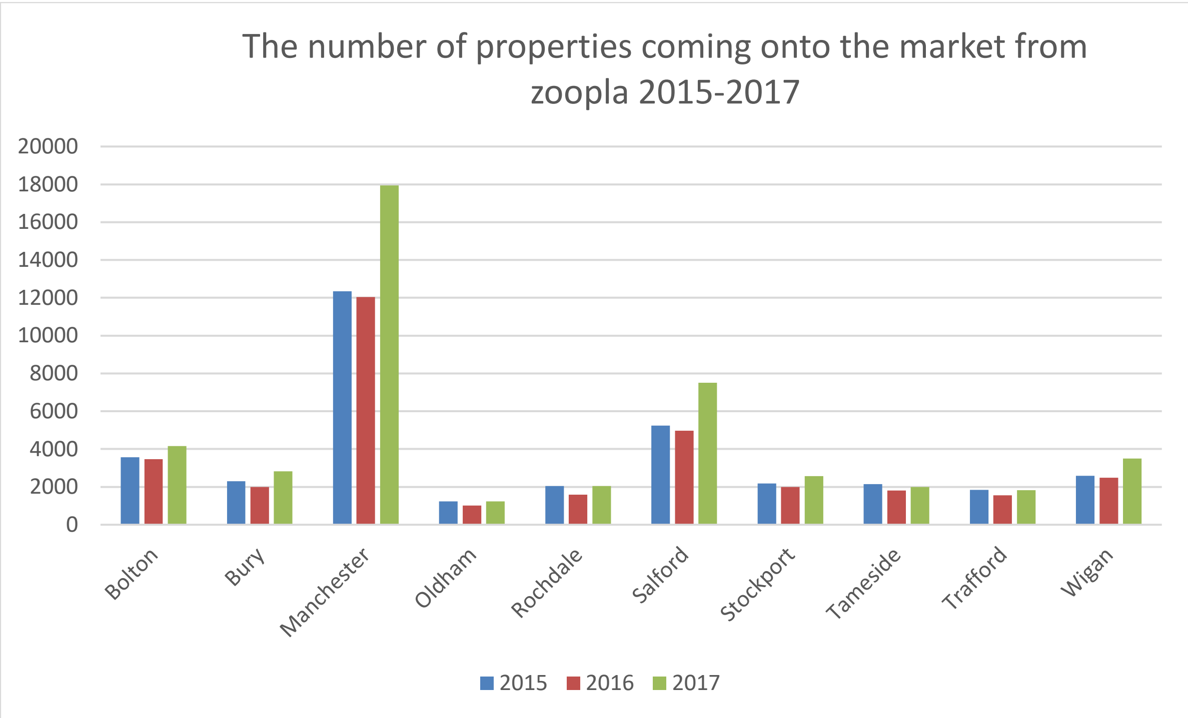
11.4 Over the past 3 years 113,981 properties have been advertised across Greater Manchester through the Zoopla website and show a 29% increase in numbers becoming available. However, the charts below show that overall figures mask geographical trends.

[57] Glynn, 'Personal View', 19, 29.
[58] Silver, 'Homes to Assets', 36.
[59] Scullion, Gibbons *et al.*, 'Precarious lives (report)', 6.
[60] Glynn, 'Personal View', 22.
[61] Scullion, Gibbons *et al.*, 'Precarious lives (report)', 7.
[62] Gibbons, 'Precarious Lives (presentation)', 7.
[63] Scullion, Gibbons *et al.*, 'Precarious lives (report)', 11.
[64] Scullion, Gibbons *et al.*, 'Precarious lives (report)', 6.

11.5 The majority of properties become available in Manchester and Salford, with relatively smaller numbers for the other authorities. In the majority of markets there have been increasing number of properties becoming available over the past 3 years. However, in Oldham, Rochdale, Tameside and Trafford, this has not been the case. Here reduced numbers of properties have been coming onto the market. Oldham, Rochdale and Tameside are all lower value markets and Trafford has a relatively small market at 13.7%. However, other markets where the PRS is smaller are Wigan and Stockport and here increases in the numbers coming to market have been recorded.

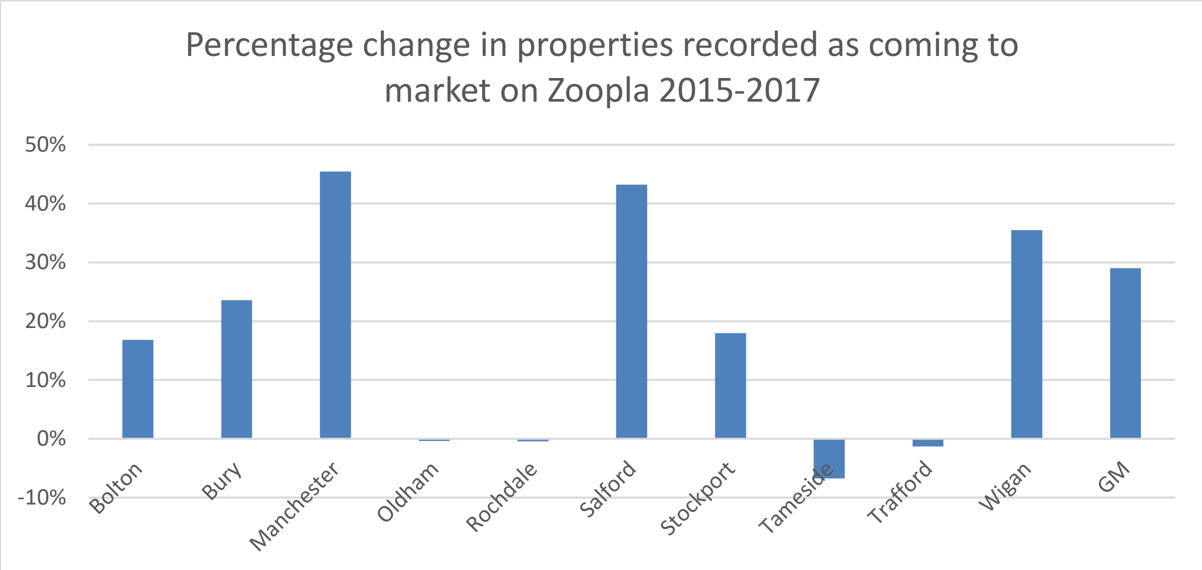
11.6 Therefore, there are clearly different pressures operating in markets across Greater Manchester where some markets will be growing with new properties coming to the market, whilst others will be seeing lower churn and fewer properties coming onto the market. The next section considers accessing the properties and choice.

Chart 11.1 The number of properties coming onto the market for rent from Zoopla 2015-2017



Source: Zoopla

Chart 11.2 Percentage change in properties recorded as coming to market on Zoopla 2015-2017



Source: Zoopla

Choice

11.7 The analysis below has been undertaken in two of the local authorities of Greater Manchester; Trafford, a high value market and Oldham, a market that consistently lags behind the other GM housing markets. Whilst data is available for other local authorities and can be back dated to 2011, the analysis is beyond the scope of this research but could potentially form part of a phase 2 research project.

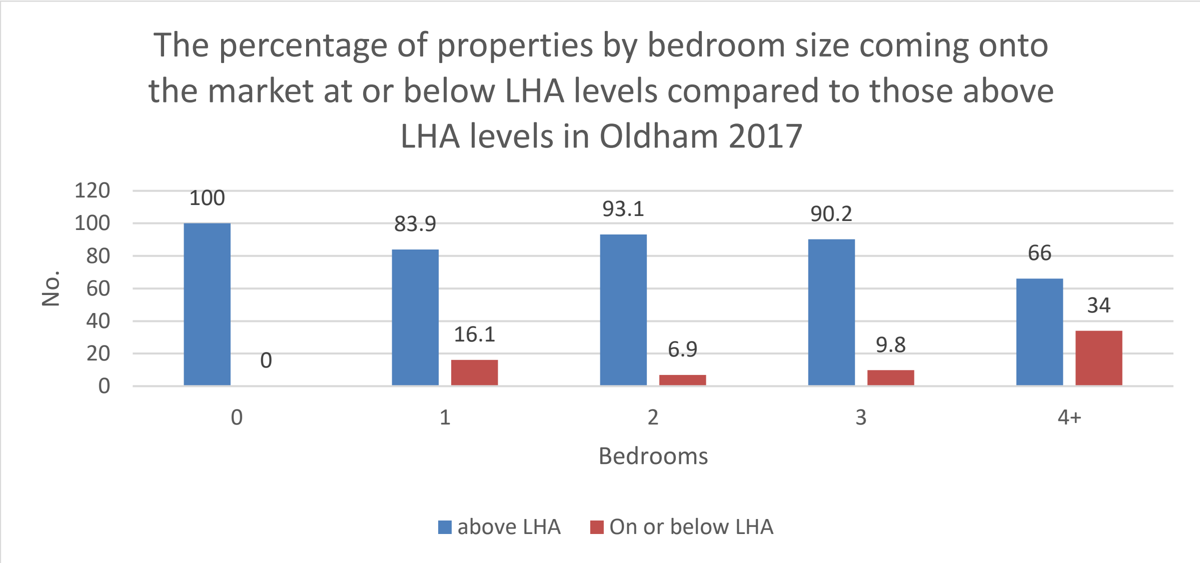
11.8 The initial issue considered is one of choice in the market and whether households dependent on benefits, looking for property to rent, have a reasonable choice. All of the properties that came onto the market in 2017 have been recorded and the rent levels compared with the Local Housing Allowance caps for Oldham and Trafford. The number of properties that were available within the LHA caps by bed size has been recorded and expressed as a percentage of all of that property type available in Chart 11.3 and 11.4.

11.9 Overall, the proportion of units being advertised within LHA levels are very low in both authorities. For both authorities, there were no bedsits available. There are few bedsits reported on Zoopla but those that are tend to be higher value apartments. Larger properties are more likely to be advertised but we know from data checks that these are often shared homes.

11.10 There are likely to be issues of choice in the markets, open access to property and potential competition from higher income earners. Previous data analysis in other locations across England and Wales, consistently confirm that if Local Housing Allowance levels are increased by 10-15%, a significantly higher proportion of properties become available; confirming that some landlords will use the LHA as a base line for rent and add a percentage 'top up' assuming households will 'find' the extra rent themselves.

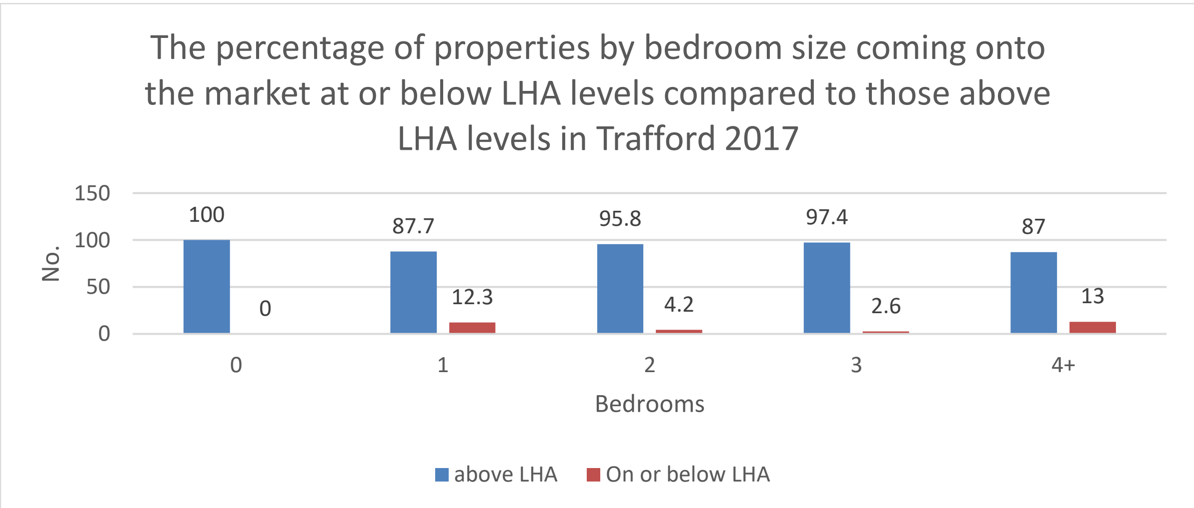
11.11 The literature review confirms that demand arises due to scarcity of social rented properties for single people, the narrow criteria to access social housing, which exclude certain groups, or the fate of those evicted from social housing, who are often the most vulnerable or chaotic households and individuals.[65] Almost one-third of landlords surveyed (31%) have seen an increase in demand from under-35s in the last three years (only 3% say it has fallen).[66]

Chart 11.3 The percentage of properties by bedroom size coming onto the market at or below LHA levels compared to those above LHA levels in Oldham 2017



Source: Zoopla

Chart 11.4 The percentage of properties by bedroom size coming onto the market at or below LHA levels compared to those above LHA levels in Trafford 2017



Source: Zoopla

[65] Scullion, Gibbons *et al.*, 'Precarious lives (report)', 6.
[66] Pattison and Reeve, 'Access to homes', 6.

11.12 The affordability challenges in the private rented market are well documented through the English Housing Survey.

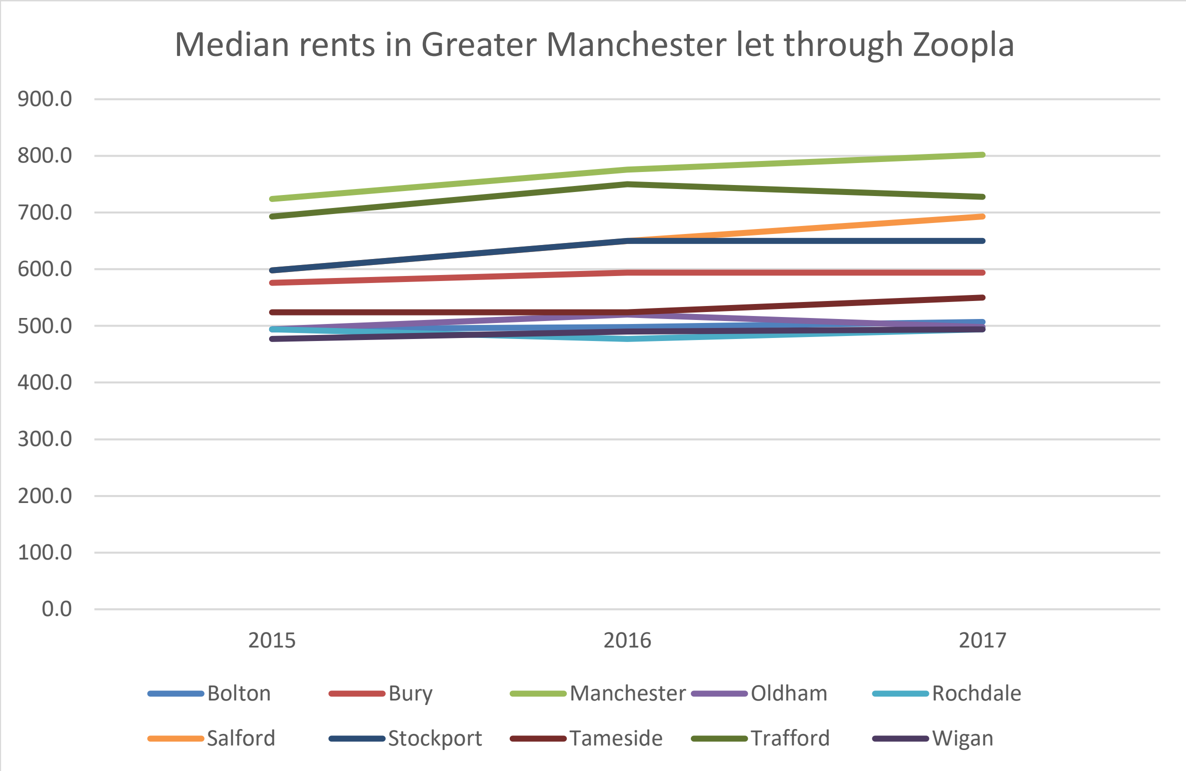
11.13 The Greater Manchester: Strategic Housing Market assessment October 2016 confirms that affordability can be seen to have worsened quite considerably everywhere between 2013 and 2015. Greater Manchester's lower quartile affordability ratio is 5.54. Greater Manchester is significantly more affordable than the England average (5.549 compared to 7.02 on the lower quartile measure in 2015, and 5.82 and 7.63 on the median measure).

11.14 Within Greater Manchester, most of the districts have affordability ratios of around 4.5-5.5. Trafford has the highest affordability ratio, exceeding a ratio of 8 on both measures in 2015. This ratio is above the national average and also exceeds the ratios for the districts that adjoin Greater Manchester. Stockport's affordability ratios are also relatively high, although this is lower than some of the districts around Greater Manchester, such as both of the Cheshire districts and West Lancashire and similar to Chorley and High Peak. Overall, there is a clear pattern of less affordable housing around the south of Greater Manchester both within and adjoining the sub-region.

11.15 Further analysis on affordability would be possible utilising local rent levels and income levels, data which is available but beyond the scope of this report. Utilising Zoopla data, median rent levels are recorded in each local authority over the past 3 years (Chart 11.5) and the percentage change in each local authority over the same period recorded in Chart 11.6.

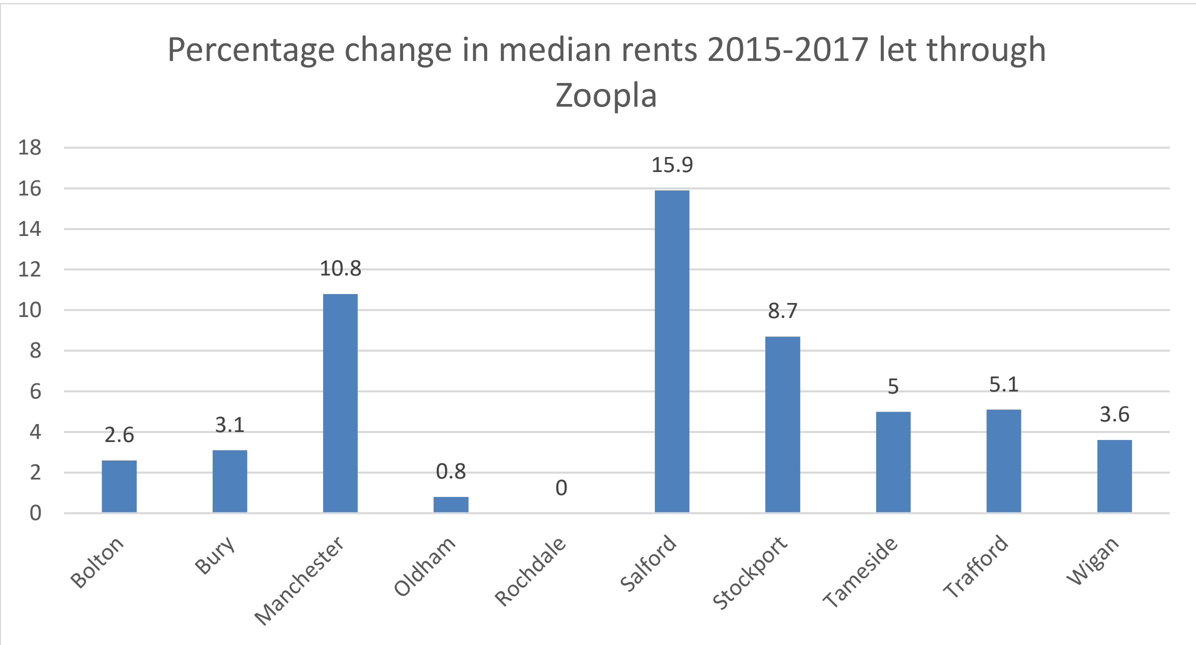
11.16 Chart 11.5 confirms rents are increasing with the exception of rents in Rochdale where they have remained static. Particularly, high increases are recorded in Manchester, Salford and Stockport. Trafford remains buoyant at 5.1% and Tameside is keeping pace with its performance albeit in a lower value market

Chart 11.5 Median rents in Greater Manchester let through Zoopla



Source Zoopla

Chart 11.6 Percentage change in median rents 2015-2017 let through Zoopla



Source Zoopla

11.17 Recent research undertaken by arc4 demonstrates the affordability challenges in the Trafford market, research that could be undertaken across Greater Manchester.

11.18 Maps 11.1 and 11.2 consider the percentage of household income that would be required to be spent on rent to afford the median rent level within locations for houses and flats respectively in Trafford.

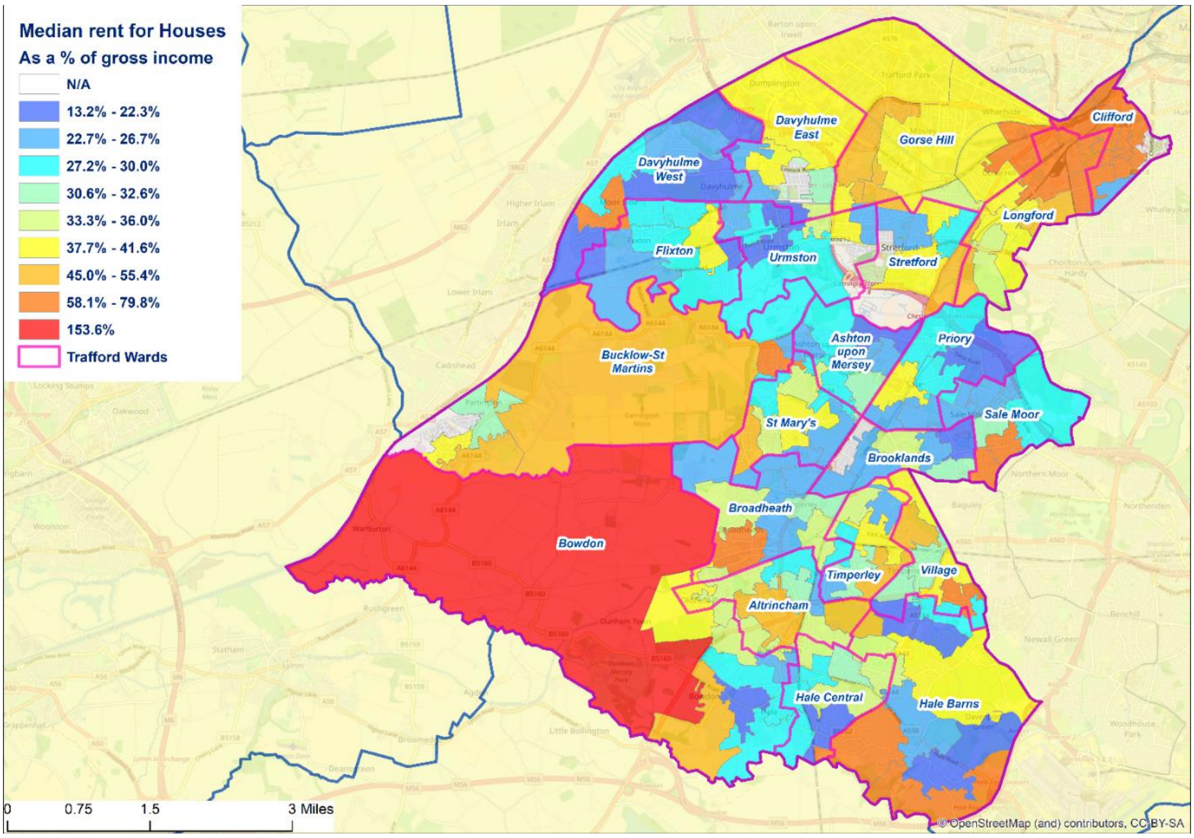
11.19 The maps illustrate the pressure on the market. Affordability of the rented market is not solely attributable to property values, although this plays a role. Large parts of Hale Central fall within the 30% definition. Clearly, the demand for rental properties is impacting on rent levels even in lower value areas where incomes are much lower. Income levels in lower value area such as Clifford and Gorse Hill will be in part lower because many households depend on benefits, bringing down overall levels but clearly there are pressures in these markets and the benefits trap is significant.

11.20 Where houses are available for rent, 62 (47%) of LSOAs are below the 30% target.

11.21 Whilst many specific locations are affordable, this demonstrates the focus of the market and how it changes between locations. Those wards with the largest market rented sector are Altrincham, Priory, Hale Central, Clifford and Gorse Hill. Significant elements of Altrincham are outside of the 30% definition. In Priory which has the highest levels of market rent accommodation, the locations toward the east of the ward are affordable within a 30% figure, however significant elements bordering Ashton on Mersey are up to 36%.

11.22 Affordability will be challenging for families using the market rented sector as a tenure of choice and for those trying to save a deposit. In part, the affordability challenges will be an under supply of larger houses coming onto the market.

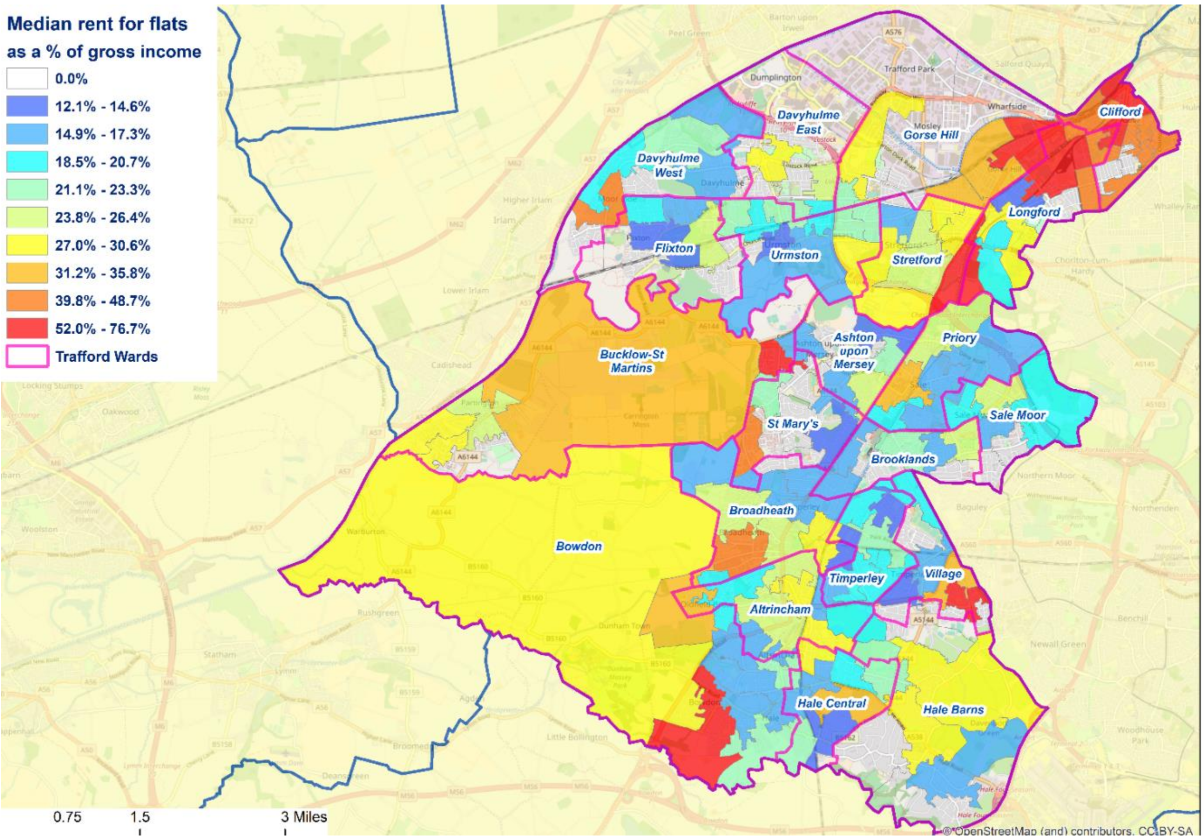
Map 11.1 The percentage of income to be spent on rent to afford a median value house



Source: Cameo

11.23 For flats, affordability is improved across the Borough. Toward the north of the Borough, the majority of locations fall within the 30% definition. Priory still retains some challenges and Bucklow-St-Martins has limited affordability, but this has a very small market rented sector, focusing much more on social rent. Toward the south there are pockets of challenge around this definition in Hale Barns, Central, Village and Broadheath.

Map 11.2 The percentage of income to be spent on rent to afford a median value flat



Source: Cameo

Feedback from local authorities

11.24 Individual local authorities were contacted for feedback to this question. The detailed responses are in Appendix I.

12. What is the response from Local Authorities to the lack of social housing?

12.1 The literature reviewed did not address this issue and the feedback from local authorities has been reviewed under Section 8: What initiatives are there to support private renters in Greater Manchester? What is lacking?

Feedback from local authorities

12.2 Individual local authorities were contacted for feedback to this question. The detailed responses are in Appendix G and in summary the issues included: building more homes, improving pathways to homeownership, making best use of the social rented homes available, institutional PRS, new housing delivery mechanisms, new models for delivery.

13. What are Local Authorities doing to assist with renting in PRS?

13.1 Manchester's Housing Compliance and Enforcement Team (24.5 FTE) covers 58,000 PRS households (2011 census); 1,350 HMO licensed properties; 2,000 PRS properties in Selective Licence areas and 2,000 Service Requests in 2017/18 (mainly about damp and leaks).[67] Manchester uses a triage process followed by property visit, Enforcement Notice, and Breach of Enforcement Notice.[68] It pursues a targeted and proactive approach to enforcement (key locations, serial offenders); educates and supports vulnerable residents to access their rights (protect from retaliation); maximises financial powers for enforcement (prohibitions, charging for notices); supports with neighbourhood management interventions; and on-line advice.[69]

13.2 Service providers see a diverse range of clients, with single males, older and younger people, those with mental health issues, women who had experienced separation and/or domestic violence, lone parents, care leavers, migrant workers, refugees and residents with low levels of English all cited as particularly vulnerable.[70] The Mayor of London's Rogue Landlord and Agent Checker and the 'report a rogue' tool launched in December 2017 has attracted considerable publicity and has its counterpart in Greater Manchester.[71] Glynn nevertheless argues it is easy to blame amateur landlords as 'rogue' rather than structural problems in the market.[72] There are in any case limited prosecutions of landlords (nationally 60% of councils convicted none in 2016/17).[73]

13.3 The responses are included in Section 8: What initiatives are there to support private renters in Greater Manchester? What is lacking?

[67] Breige Cobane, 'Utilising Local Authority Powers', [seminar presentation], *Greater Manchester Housing Providers Private Rented Sector Seminar*, Manchester City Council, 2 July 2018, 98. See slide for further elaboration.
[68] Cobane, 'Utilising Local Authority Powers', 100.
[69] Glynn, 'Personal View', 34.
[70] Scullion, Gibbons *et al.*, 'Precarious lives (report)', 6.
[71] Rhona Brown, 'Supporting London's private renters – The Mayor of London's approach', [seminar presentation], *Greater Manchester Housing Providers Private Rented Sector Seminar*, Greater London Authority, 2 July 2018, 86-95.
[72] Glynn, 'Personal View', 30.
[73] Glynn, 'Personal View', 24.

14. Additional research questions

14.1 During the research additional questions were considered which were:

- What is the average length of a contractual PRS tenancy, in GM? (Could also look at how do the different areas of GM compare);
- What are the barriers to landlords granting longer tenancies? (e.g. insurance, mortgage restrictions etc.);
- How many landlords have sought possession based on arrears caused by issues with tenants' benefits (e.g. Universal Credit delays)?
- What percentage of agencies/landlords accept tenants in receipt of benefits? How many operate a 'no DSS' policy in GM?
- Why do landlords in GM operate 'no DSS' policies?
- What assurances would landlords need to dispense with 'no DSS' policies?

14.2 Discussions were held with the Residential Landlord Association and the RLA reviewed its currently published research and re-analysed data at the North West level for data held in-house. Unfortunately, not all areas of evidence could be identified from the current body of evidence, however, it is likely that a further piece of commissioned research would be able to uncover the data required.

What is the average length of a contractual PRS tenancy in GM?

14.3 In 2016-17, half (50%) of private renters had lived in the private rented sector for less than 5 years while 24% had been in the sector for 5-9 years and 27% for 10 or more years. English Housing Survey 2016/17.

14.4 This data is currently not available at a GM level. However, from the English Housing Survey, the most common initial tenancy length in 2015-16 was 12 months (45% of tenants), followed by 6 months (36%).

14.5 However, the average amount of time private renters had spent in their current home was 4.3 years. With those over 45 more likely to stay on average in their rented property for longer (DCLG, 2017[74]).

[74] DCLG. (2017). *English Housing Survey: Private rented sector, 2015-16*. London, UK: Department for Communities and Local Government. Retrieved from https://www.gov.uk/government/statistics/english-housing-survey-2015-to-2016-private-rented-sector

What are the barriers to landlords granting longer tenancies (e.g. insurance, mortgage restrictions etc.)?

14.6 From previous research identified by the RLS, 11% of landlords in the North West region do not normally offer tenancies over 12 months because of mortgage/insurance restrictions (Simcock, 2017[75]). Further reasons included:

- Shorter tenancy length requested by the tenant (10% of landlords);
- Previous bad experience with a tenant – shorter for my safety (35%);
- Standard practice – never thought of offering longer tenancies (43%).

14.7 Despite this, RLA research found that 62% of landlords would be willing to offer 12 month or longer tenancy at the request of the tenant.

14.8 In a different research report, the RLA found that 73% of landlords would be willing to offer longer-term tenancies (3 years or more) if there was tax relief provided for landlords and improvements to the Section 8 process (Simcock, 2018[76]).

14.9 From these findings, the RLA concluded that the barriers towards longer-term tenancies are due to issues with the Section 8 process and the lack of confidence landlords have in the system to regain possession of their property.

How many landlords have sought possession based on arrears caused by issues with tenant's benefits (e.g. Universal Credit delays)?

14.10 This data was available at a North West level from RLA previously published research (See: Simcock, 2017[77])

- 27% of landlords in the North West reported that they had sought possession of a property from a tenant who was in receipt of Universal Credit (*N*=135)
- Of which 88% reported that rent arrears was the primary cause (*N*=43). The roll out of universal credit could well increase this.

[75] Simcock, T. J. (2017). *Welfare Reform and Universal Credit: The impact on the private rented sector*. Manchester, UK: Residential Landlords Association. Retrieved from https://research.rla.org.uk/wp-content/uploads/Welfare-Reform-and-Universal-Credit-The-impact-on-the-private-rented-sector-2017.pdf

[76] Simcock, T. J. (2018). *The Impact of Taxation Reform on Private Landlords*. Manchester, UK: Residential Landlords Association. Retrieved from https://research.rla.org.uk/wp-content/uploads/impact-taxation-reform-landlords-2018.pdf

[77] Simcock, T. J. (2017). *Welfare Reform and Universal Credit: The impact on the private rented sector*. Manchester, UK: Residential Landlords Association. Retrieved from https://research.rla.org.uk/wp-content/uploads/Welfare-Reform-and-Universal-Credit-The-impact-on-the-private-rented-sector-2017.pdf

What percentage of agencies/landlords accept tenants in receipt of benefits? How many operate a 'no DSS' policy in GM?

14.11 The current data that is held does not differentiate between which landlords/agents accept tenants in receipt of benefits or operate a 'no DSS'; policy. In the North West region, 59% of landlords reported they were not willing to rent to tenants on Universal Credit (*N*=387)

Why do landlords in GM operate no 'DSS' policies?

14.12 As part of this research the RLA identified a number of policy changes that had made landlords less willing to let to homeless people and people on benefits.

14.13 In the North West, these were:

- Caps on Local Housing Allowance (LHA) rates (59% of landlords);
- 4-year freeze on Housing Benefit (HB) payments to working age claimants (61% of landlords);
- Increased regulation of the sector (55% of landlords);
- Taxation changes (53% of landlords);
- Direct payment of universal credit housing costs to tenants rather than the landlord (73% of landlords).

14.14 The RLA also found that 13% of landlords in the North West region have mortgage conditions that prevent them from renting out to tenants claiming benefits and/or universal credit.

14.15 Research commissioned by RLA PEARL and conducted by academics from Sheffield Hallam University found that around one in five landlords think the taxation changes to Mortgage Interest Relief would make them less likely to let to under 35's, and the impact of this change is more pronounced for landlords with larger portfolios. The findings further suggest that the taxation changes will have a greater impact on landlords letting to tenants on Housing Benefit and Universal Credit. This is a worrying finding, given the present difficulties for those on benefits in accessing accommodation (Pattison, 2017[78]).

[78] Pattison, B. (2017). *Landlord perceptions of mortgage interest relief*. Sheffield, UK: Sheffield Hallam University. Retrieved from https://research.rla.org.uk/wp-content/uploads/Landlord-Perceptions-of-Mortgage-Interest-Relief-FINAL.pdf

What assurances would landlords need to dispense with 'no DSS' policies?

14.16 While this data is not available at a Greater Manchester level or a North West level. Research from Sheffield Hallam University (Pattison & Reeve, 2017[79]) found the following regulatory and policy changes would make them more able or willing to rent to under 35's (and the sub-market that was found landlords were less likely to let to were Benefit/Universal Credit tenants):

- Tax changes (reversing changes to Mortgage Interest Relief) – 57% of landlords;
- Tax relief for longer tenancies – 52% of landlords;
- Higher Local Housing Allowance rates – 40% of landlords;
- Less local regulation of private landlords (e.g. licensing) – 37% of landlords;
- More regulation of private landlords to root out 'rogue' landlords – 17% of landlords;

14.17 In the same research, landlords were asked what type of initiative would make them more able or willing to rent to under-35's:

- Bond / rent deposit schemes (81% of landlords);
- Support to landlords with lettings (e.g. recruitment, management) (39% of landlords);
- Support to tenants (e.g. provided by a local agency) (32% of landlords);
- Social letting agency / leasing arrangements (21% of landlords).

14.18 RLA PEARL would be able to undertake further in-depth research to explore the gaps in knowledge at a Greater Manchester level. This research would involve a cross-sectional survey of landlords in the Greater Manchester area, this would be hosted using the RLA PEARL survey system and distributed to landlords on the RLA database and also through Local Authority databases. A full report including a short review of literature on this topic could be provided.

[79] Pattison, B. (2017). *Landlord perceptions of mortgage interest relief*. Sheffield, UK: Sheffield Hallam University. Retrieved from https://research.rla.org.uk/wp-content/uploads/Landlord-Perceptions-of-Mortgage-Interest-Relief-FINAL.pdf

15. Conclusions and proposed stage 2 research

15.1 In summary for each question:

How many homes in Greater Manchester are privately rented, and what proportion of the housing stock is this? How has this changed over time?

15.2 According to the 2011 Census, 16.1% of households lived in the private rented sector (PRS) in Greater Manchester in 2011, slightly lower than nationally (16.7%). The PRS in Greater Manchester has more than trebled over that period, from 6% to 20%.[80] There is no definitive dataset that provides an up to date assessment of the number of homes that are privately rented.

15.3 Two methods have been used to provide a more up to date estimate of the scale of the PRS. Firstly, the census extrapolation method which considers change in the number of PRS dwellings between the 2001 and 2011 census and rolling forward this change. Secondly, the application of the national estimate of PRS using the English Housing Survey. Taking an average of these methods results in a slightly higher proportion (21.6%) than the national estimate of households living in the PRS and results in an estimated 255,000 households living in the tenure.

15.4 Further work to explore the extent of low income PRS activity would be possible using housing benefit data (where it is possible to separate out those living in social/affordable rented and PRS stock). This would add a further dimension to understanding the scale and role of the PRS in local housing markets. The material provided at district level is also available down to output area level, so a more forensic analysis of the scale of the PRS for smaller geographies would also be possible.

What condition are the homes in the private rented sector in Greater Manchester? How does this compare to other tenures?

15.5 The now dated Greater Manchester SHMA estimated 48.6% of PRS properties in Greater Manchester were in non-decent condition in 2008, compared to 35.1% in the owner-occupied sector. This broad analysis would suggest around 51,500 dwellings (26.2%) in the PRS across GM are non-decent.

15.6 All LAs have a statutory duty to understand their housing stock in all tenures. Traditionally this was achieved through a local House Condition Survey and would typically require a physical survey of at least 1% of 1000 properties. There is a general lack of up to date stock condition survey work being undertaken. There could be some potential in working with the BRE to consider stock condition.

[80] Resolution Foundation, 'Home ownership struggle hits Coronation Street', [press release, 2 August 2016], <https://www.resolutionfoundation.org/media/press-releases/home-ownership-struggle-hits-coronation-street/>, accessed 5 July 2018. This 20% figure being the only post 2011 data identified in the literature examined, but the basis of the 20% is not outlined in the press release.

15.7 The BRE developed (from 2004) a 'modelling' system using a number of data sources including English Housing Survey & Experian – by circa 2010 this was accepted by Government as the only option to a traditional HCS to meet the statutory duty. Many local authorities pay the licence for this rather than carry out a traditional HCS.

15.8 BRE can therefore model housing conditions at dwelling level, allowing aggregation to various geographic areas, allowing comparisons by tenure, and also with regional and national averages. As the models are dwelling level, BRE is able to integrate a range of locally available data sets such as EPC lodgements, low income households, energy or construction data, enforcement data etc.

15.9 HM Land Registry has also made available a Commercial and Corporate Ownership Dataset (CCOD) and Overseas Companies Ownership Dataset (OCOD) containing more than 3.4 million title records of freehold and leasehold property in England and Wales. All ownership categories are available excluding private individuals, therefore it is possible to identify dwellings owned by local authorities, housing associations and commercial entities. Cross referencing the names of registered providers of social housing allows private tenures to be distinguished from social rented, and from initial research a significant proportion of the private rented sector is also identifiable. This will not only indicate tenure, but also identify ownership allowing, for example, the number of addresses owned by particular organisations in an LA area.

15.10 Energy Performance Certificate (EPC) data can also be used to explore the energy efficiency of PRS dwelling stock as a broad indicator of stock condition. Data is available for GM.

What are the demographics of private renters in Greater Manchester, how does this compare?

15.11 The evidence presented is based on available census evidence, national studies and household surveys carried out within Greater Manchester.

15.12 With the permission of local authorities, further bespoke analysis could be possible from the existing household survey data. Although the analysis of existing survey data available for Greater Manchester is showing comparable results to the 2011 census, this is only based on surveys in 3 out of 10 districts.

15.13 It would be beneficial to carry out a bespoke survey of PRS households across Greater Manchester which could also consider questions of why households chose to live in the PRS, their future housing considerations, financial ability to access other tenures and the reasons for choosing particular areas to live and types of dwelling occupied.

15.14 There was very little comprehensive data individually within local authorities.

What are the main issues for private renters in Greater Manchester, especially low-income renters?

15.15 Nationally, this is a well-documented subject but there is no definitive evidence base for Greater Manchester. The majority of the data comes from a YouGov survey and potentially further interrogation can be made of this data.

15.16 Further analysis of the Greater Manchester household survey dataset would provide a range of data to consider this question, but this requires the permission of local authorities to further analysis. We could use the existing Greater Manchester household survey to explore this – particularly affordability, quality, reasons for moving in, need/aspiration to move out.

15.17 This could be explored further in a bespoke household survey if that was chosen by Shelter.

15.18 Further analysis on affordability would be possible utilising local rent levels and income levels, data which is available but beyond the scope of this report

15.19 There are significant issues identified by councils, but these are mainly anecdotal.

What initiatives are there to support private renters in Greater Manchester? What is lacking?

15.20 There were a significant number of examples highlighted; however, it was often difficult to distinguish between actions to increase the supply and quality of PRS housing and activities/projects to genuinely support private renters in Greater Manchester.

15.21 The feedback from local authorities provides a rich source of information through individual responses and reading through published strategy documents. There was no evidence for feedback explaining what was lacking.

15.22 For stage 2 it would be useful to better understand these projects, the scale of them, their success on the ground, the outcomes that have been achieved, their replicability and potential economies of scale. It would seem that many of these projects could be extended/included within the Test and Learn Grants programme.

How many landlords own stock in the private rented sector in Greater Manchester?

15.23 There was very limited data on this and no specific answer available. None of the documents reviewed made any reference to the number of landlords in operation. Manchester City Council confirmed that they did not know how many such landlords were in operation.

15.24 The BRE have confirmed that they can provide tenure data as described above, predicting the number and distribution of the sector. The only source of data identifying landlords other than for example the LA's own council tax data is the CCOD and OCOD. The BRE have developed software allowing us to identify the addresses of GM properties owned by commercial or corporate organisations. Whilst this doesn't offer exhaustive information about the ownership of all private rented property, for example landlords with a very small portfolio who have not set up companies, it will identify the larger landlords operating in GM, and a list can be produced identifying the owner, and number and addresses of properties they own across the region.

What are the issues that landlords see in the sector in Greater Manchester?

15.25 From reviewing the documents available there was very little, if any, direct referencing on the view of private sector landlords themselves and any feedback was not focused toward Greater Manchester.

15.26 Further research through landlord forums and potentially the RLA and NLA databases would provide insight as well as more specific feedback from other stakeholders.

15.27 It may be useful to focus stage2 work on those locations with selective licensing where more detailed information is held on individual landlords and there is potential for engagement on issues for landlords in challenging markets.

What are the main barriers for private renters (especially low-income renters) accessing the PRS in Greater Manchester?

15.28 The literature review provided limited information, but the local authority responses confirmed consistency around affordability, condition of stock and insecurity of tenure.

15.29 The arc^4 Zoopla dataset and CAMEO income data demonstrate that there is far more fine-grained data that can be reviewed to add value to this question and further data could be commissioned as part of stage 2, particularly around access to property within LHA levels and affordability.

15.30 More detailed primary work could evidence this further such as an online survey. The general themes of relevance to this question would be:

- Ability to access alternative tenures;
- Reputation of the sector;
- Issues of tenancy length and instability;
- Financial pressures when renting (cost of rent and utilities);
- Landlord issues.

What is the response from Local Authorities to the lack of social housing?

15.31 The literature review provided limited information, but the local authority responses confirmed there were a significant number of examples highlighted.

15.32 For stage 2 it would be useful to better understand these projects, the scale of them, their success on the ground, the outcomes that have been achieved, their replicability and potential economies of scale. It would seem that many of these projects could be extended/included within the Test and Learn Grants programme.

What are Local Authorities doing to assist with renting in PRS?

15.33 The literature review provided limited information, but the local authority responses confirmed there were a significant number of examples highlighted.

15.34 For stage 2 it would be useful to better understand these projects, the scale of them, their success on the ground, the outcomes that have been achieved, their replicability and potential economies of scale. It would seem that many of these projects could be extended/included within the Test and Learn Grants programme.

Recommendations

15.35 A significant amount of data and information has been collected; much is Census dated and to an extent some forecasting has been undertaken by arc4. Further data sets are available but no dataset will be comprehensive across the entire market. It is possibly worth exploring the BRE stock condition data set and undertake additional primary data analysis on the Local authority datasets held by arc4. Further datasets are held which could explore:

- Affordability across GM
- Households claiming Housing benefit
- Properties available below, at or 'just above' LHA levels across GM, their locations and property type.
- EPC data for the private rented sector

15.36 In addition, it could be worth considering what housing providers across GM are doing to assist with renting in the PRS and further research could extend to this sector.

15.37 Discuss the potential/appetite for GM local authorities to secure BRE data on stock condition through a joint procurement and costs sharing basis.

15.38 it could there has been a significant amount of anecdotal evidence data captured and it is recommended that a number of stage 2 elements are considered:

15.39 Comprehensive landlord survey across GM. The questionnaire would be thematic and include questions on:

- Quality of stock;
- Tenancy issues (length of tenancy, how tenants treat properties, replacement of carpets/white goods, or how well properties are furnished at the start of their tenancy);
- Welfare reforms;
- Financial issues for landlords;
- What makes a good tenant.

15.40 This could potentially focus in those locations with selective licensing where more detailed information is held on individual landlords and there is potential for engagement on issues for landlords in challenging markets.

15.41 More detailed primary work on barriers for private tenants. The general themes of relevance to this question would be:

- Ability to access alternative tenures;
- Reputation of the sector;
- Issues of tenancy length and instability;
- Financial pressures when renting (cost of rent and utilities);
- Landlord issues.

15.42 A detailed call for evidence on initiatives that could be developed further to support private renters. This could underpin the Test and Learn Grants programme.

Appendix A: National Context

A.1 In 2016, there were an estimated 23.7 million dwellings in England, including both occupied and vacant homes. Of these, 14.8 million (62%) were owner occupied, 4.9 million (20%) were private rented, 1.6 million (7%) were local authority and 2.4 million (10%) were housing association homes. (English housing survey 2016/17)

A.2 In 2016-17, the private rented sector accounted for 4.7 million or 20% of 1.8 households. Throughout the 1980s and 1990s, the proportion of private rented households was steady at around 10%. However, the sector has more than doubled in size since 2002. (English housing survey 2016/17)

A.3 Although younger people have always been over-represented in the private rented sector, the proportion of younger people in this sector has increased over the last decade. About two thirds (68%) of households in the private rented sector had a HRP aged under 45 years. While the under 35s have always been over-represented in the private rented sector, over the last decade or so the increase in the proportion of such households in the private rented sector has been particularly pronounced. In 2006-07, 27% of those aged 25-34 lived in the private rented sector. By 2016/17 this had increased to 46%. (English Housing survey 2016/17)

A.4 The composition of the private rented sector has also undergone some restructuring. There has been a large increase in the number of families in the private rented sector, particularly lone parent families. Over a third of private (38%) and social (35%) renters had dependent children. (English Housing Survey 2016/17)

A.5 Three quarters (74%) of private renters were working, with 63% in full-time work and 11% in part-time work. Smaller proportions of private renters were retired (9%), in full-time education (6%), or unemployed (4%). (English Housing Survey 2016/17)

A.6 Whilst private renting is advantageous to many occupants due to the flexibility of tenure, many households struggle with problems relating to tenure security due to short-term contracts, uncertainty about future rents and rogue landlords who do not guarantee the quality of accommodation. In brief, the private rented sector is characterised by high risks to tenants and limited to no prospects of capital accumulation, especially when compared to the social and owner-occupied sector; In 2015-16, 21% of private renters were dissatisfied with their status as private renters (9% of whom were very dissatisfied with their current status), compared with 10% of social renters and less than 1% of owner occupiers. (English Housing survey 2015-16)

A.7 Affordability, which is a predominant issue throughout the entire housing sector, is a problem for private renters too as they spend a larger proportion of their income on housing compared to homeowners and social renters. Research suggests that the average estimate of the cost of renting privately is 35% of income, but this figure varies greatly, and a significant number of households do spend a higher proportion. On average, rent payments were 28% of household income for social renters and 34% of household income for private renters. Between 2008-09 and 2014-15, the proportion of private renters in receipt of Housing Benefit increased steadily from 19% to 27%; since then the proportion has declined to its current 22%. (English Housing survey 2016/17)

A.8 While the energy efficiency and quality of the private rented sector has improved, standards lag behind the social rented sector. A report published in March 2018 by the Academic Practitioners Partnership[81] 'Delivering Healthy Housing' (https://www.birmingham.ac.uk/schools/social-policy/news/2018/03/delivering-healthy-housing.aspx made the following observations about the private rented sector:

'The growth of the private rented sector in recent years has increased the number of households in poor housing and many of the worst problems of unhealthy housing are in this tenure. Parts of the sector are well managed and provide suitable accommodation, but tenants generally lack security, while local authorities' capacity to enforce regulations designed to protect them has become patchy and insufficient.

In England, there have been incremental steps since 2015 to address problems in the sector These changes are welcome but fall short of the comprehensive approach that is needed and their impacts are difficult to assess. By contrast, recent legislation in Scotland has addressed stability and security in the sector and over time, should change the expectations and behaviour of landlords, tenants and investors. A new form of tenancy has been introduced, with no end date, giving tenants greater security and landlords a more accessible repossession process. All disputes will be heard in a new specialist tribunal and all letting agents are required to register and adhere to a code of practice. The new arrangements are expected to have an increasing impact on how the private rented sector works, as new tenancies increase in number and existing assured and short assured tenancies come to an end.

Private renting is expected to continue to expand in the UK and the cases where tenants' health and wellbeing are insufficiently protected and where family life and life chances are damaged will also grow unless, as in Scotland, steps are taken to improve security of tenure, provide a better deal for landlords and tenants, and eliminate the activities of so-called rogue or criminal landlords.

A pro-active and more ambitious agenda for the private rented sector would support and encourage the provision of well managed housing with reasonable standards, with a registration system for private landlords and the properties they let, and with a tax-deductible charge for this that would help to finance local authorities' activities in relation to private housing. Actions to reward responsible and professional landlords might include tax incentives for the improvement of dwellings to specific high standards of property condition, energy efficiency and management. At the same time, local authorities would be required to take rapid enforcement action against landlords who fail to meet their legal obligations, including action to remedy defects and to take over management of properties in certain cases.'

A.9 The reasons behind the quality issue in the private rented sector are complex and interrelated. However, there is one straightforward factor: private rented housing

[81] The Academic-Practitioner Partnership (A-PP) is an informal partnership of academics, housing and regeneration practitioners and housing and health researchers. Our focus is on housing and health. We want to see better housing conditions in the United Kingdom. We believe this will bring many other social and economic benefits.

tends to be older. The UK has some of the oldest housing stock in Europe, and much of that older stock is privately rented. Privately rented dwellings were more likely to be older with a third (35%) built before 1919, compared with 21% of owner occupied and 7% of social sector homes. (English Housing survey 2016/17)

A.10 The private rented sector had the highest proportion of non-decent homes (27%) while the social rented sector had the lowest (13%). Among owner occupied homes, 20% failed to meet the Decent Homes Standard in 2016. (English Housing survey 2016/17)

A.11 Churn in the private rented sector is higher than in other sectors. The greatest number of household moves occurred within, into or out of the private rented sector. In total, 860,000 households moved within the tenure (i.e. from one privately rented home to another) and 149,000 new households were created. There were 179,000 moves into the sector, of which 80%, (143,000) were from owner occupation. There were 266,000 moves out of the sector, with 68% (182,000) of these moving to owner occupied accommodation, (English Housing survey 2016/17).

A.12 Overcrowding was more prevalent in the rented sectors than for owner occupiers. Only 1% of owner occupiers (183,000 households) were overcrowded in 2016-17 compared with 7% of social renters (268,000) and 5% of private renters (231,000). (English Housing survey 2016/17)

A.13 The Housing White Paper acknowledged that private tenants spend a high proportion of their income on rent, an increasing dependency on housing benefits, and that the most common cause of homelessness is the loss of tenancy in the private sector; these are all correct and welcome observations as are Government promises to encourage family-friendly tenancy agreements and to encourage institutions to invest in the housing sector and build more homes, including for private rent.

Appendix B: How many homes in Greater Manchester are privately rented, and what proportion of the housing stock is this? How has this changed over time?

Local authority responses

Local Authority	Number/Trends	References
Manchester City Council	Unable to find a figure for the level of PRS stock in any publicly available documents from MCC. However, the following information about households rather than stock as follows:	
	'61,000 households (28% of the City's stock) that rent privately in Manchester a proportion that is higher than all the other major cities' This is an increase from Autumn 2013 when private renting 'expanded more rapidly than anywhere else in the country to provide homes for 55,000 households.'	Manchester Housing Strategy 2016-2021. Page 20. Theme Growth.
	The total housing stock in Manchester City Council is 221,680	Manchester's Market Rental Sector Strategy 2015. Page 3 Introduction.
	28% of 221,680 is 62,070. Obviously, this does not balance back to the information in the strategy as we are taking data from different data sets that look at information at different times.	Gov. UK Statistics – Table 100 number of dwellings by tenure and district. England.
Stockport	16,311 units of PRS or 12.7% of the total 128,038 stock.	Direct answer to questionnaire.
	'The private rented sector in Stockport is relatively small but growing and plays a vital role in the operation of Stockport's housing market.'	Stockport Housing Strategy 2016-2021. Page 6. Introduction.
	12.3% private rented – significant increase in demand over the last 2/3 years. Private rents are almost twice that of social rents for comparative property types'.	Stockport Housing Strategy 2016-2021. Page 19. Local Context. Key Statistics.

Local Authority	Number/Trends	References
	The private rented sector in Stockport, as in other parts of the country, has grown significantly over recent years. According to the last Census 12.3% of homes were privately rented. The private rented sector will be playing a growing role in meeting the needs of the "intermediate" market comprising of young economically active residents.	Stockport Housing Strategy 2016-2021. Page 40. Private rented sector. Stockport Housing Strategy 2016-2021. Page 40. Private rented sector.
Trafford	There are over 97,300 units of housing accommodation in Trafford, home to around 234,000 residents. 'Whilst many households want to own their own home, many do not or cannot afford to. Trafford has a relatively small but popular private rented sector (13.7%)' 13.7% of 234,000 equals 32,058 units. 'we intend to promote growth in the private rented sector and also to promote more homes in the intermediate market, both for sale and for rent and with greater flexibility to move between the two tenures.'	Trafford Council Housing Strategy 2018 -2023. Page 7. Housing market challenges, opportunities and implications. Trafford Council Housing Strategy 2018 -2023. Page 9. Housing market challenges, opportunities and implications. Trafford Council Housing Strategy 2018 -2023. Page 18. 2.2.2 Middle income households – growing the intermediate market to rent and buy.
Salford	In Salford the private rented sector is steadily increasing (Michael Dyson Associates Ltd 2017). Total stock in Salford 80,666 of which 19,033 is Private Rented. This equates to 23.6% of the stock.	SHUSE – Precarious lives: Exploring lived experiences of the private rented sector in Salford. Page 2 Introduction. Private Housing Condition Survey 2016. Michael Dyson Associates. Page 15 Table E3.2: Citywide 2016

Local Authority	Number/Trends	References
Wigan	Total stock 134,050. 4.17% is Private rented stock. The equates to 5,589. Despite the size of the private rented sector in Wigan being relatively small in comparison to other Greater Manchester we have seen a rapid increase in activity in this sector partly as a result of the recent buy to let boom and an increase in amateur landlords.	Wigan Council House Condition Survey 2005. Page 8 Profile of Stock. NB This is now quite dated. Vision 2026 Page 37. 4 Theme 2 - Quality.
Oldham	The private-rented sector has increased from 8,293 dwellings in 2010 to 15,185 dwellings in 2015 with private-rented dwellings now accounting for 20.3% of the private sector housing compared to 11.2% in 2010. Conversely the Private Rented Sector expanded by 60% albeit from a relatively low base- to form just over 13% of the Districts housing provision.	Oldham Council Private Sector Housing Conditions. 2015 Update. Page 3. Tenure Change. Welfare Reform: The Impact of the Summer Budget and CSR 2015 on the Social and Private Rented Sector in Oldham. Page 13
Bolton	There has been a 73% increase in private rented households between 2001 and 2011. 14% of households in Bolton rent privately	Bolton's Housing Strategy 2013-2017. Page 7. 5. Understanding the local housing market.

Appendix C: What condition are the homes in the private rented sector in Greater Manchester? How does this compare to other tenures?

Local authority responses

Local Authority	Comparative Conditions	Evidence
Manchester City Council	There is no data on the comparative quality of the city's private rented stock, which it calls Market Rented Stock.	
	There are several references to stock condition that would indicate that there are problems in quality in some market rented stock as follows:	Manchester's Market Rental Strategy 2015. Page 4.
	Mark Rent Typologies. The report lists a number of typologies including: Low End: Unprofessionally managed, poor conditions Bottom End: Poorest quality.	Manchester's Market Rental Strategy 2015. 2. Understanding the operation of the market rented sector in Manchester. Page 5.
	'welcome signs of continued improvement' generally there remain persistent concerns about the condition and management of the bottom end.	Manchester's Market Rental Strategy 2015.
	'bottom of the market where standards are not acceptable' 'these remain relatively small elements of the market'	4. Targeted enforcement and raising standards. Page 6.
	There are often high levels of low quality poorly managed rental properties in these areas' 'Worst property conditions rarely sit in isolation'	Manchester's Market Rental Strategy 2015. Strand 2. Page 9.
	'There are well maintained high-quality privately rent homes. 'Poor property conditions and management standards are tackled by effective enforcement'	Manchester. A housing Strategy 2016-2021. Our goals 2021 page 20.

Local Authority	Comparative Conditions	Evidence
	'Poor quality rents homes are concentrated in some neighbourhoods'. 'work with private sector landlords to encourage them to improve energy efficiency in all their properties' 'not yet made inroads into improving our existing private stock' 'increase the number of good quality homes in the private sector'	Manchester. A housing Strategy 2016-2021. What is our starting point? page 20. Manchester. A Housing Strategy 2016-2021. 6. Green homes in green neighbourhoods. Page 27. Manchester. A Housing Strategy 2016-2021. 8. Contributing to health and wellbeing. Page30 and page 31.
Stockport	14% of all HHSRS hazards are found in PRS compared to 11.3 % in the Owner-Occupied Sector. A review of Stockport's Housing Strategy finds the following references to stock condition in the private sector. Private Sector Provision A duty is placed on local authorities under both the Housing Act 2004 and Housing & Planning Act 2016 to tackle housing related hazards which present the most serious risk of harm to health. Privately owned and, more particularly, private rented properties are of the most concern in this area due to the high numbers of potentially vulnerable residents who may live in poor housing conditions in the private sector. The BRE (Building Research Establishment) house condition report for 2015 identified that 18% of private rented properties and 12.7% of privately owned properties in Stockport have Cat 1 Hazards.	Response to questionnaire. Stockport Housing Strategy 2016 – 2021. Private Sector Provision. Page 36.

Local Authority	Comparative Conditions	Evidence
	The Council recognises that most landlords and letting agents are reputable and provide a good service. The Council's Landlords' network helps to support landlords who are committed to high standards of management; however, there are a minority of landlords who are not managing their properties effectively. In response, the Council, along with partner agencies, will be reviewing the approach to enforcement and regulation in the private rented sector to ensure resources are focussed and targeted on those landlords and properties that fail to meet the high quality of property condition and management expected in Stockport. Strategic aims Promote and increase the supply of a well-regulated, fair, good quality private rented sector. Action • Support owners and landlords in making private homes more energy efficient and in providing safe and healthy living environments • Support private landlords in managing and maintaining their homes and effectively tackle poor and illegal practices by landlords and lettings agencies	Stockport Housing Strategy 2016 – 2021. Private Sector Conditions. Page 42. Priority 4: Improving Quality in the private sector. Page 55.
Trafford	PRS Stock Condition Survey We are hoping to commission a Private Sector Stock Condition survey by the end of this year. The last one undertaken was in 2007 so is out dated. 'take a proactive, targeted approach to address problems relating to poor property condition or management – by working with multi-disciplinary locality teams and others to identify and prioritise homes occupied by vulnerable people'	Questionnaire response Trafford Council Housing Strategy 2018-2023 3.2.2 Improving the private rented sector. Page 24.

Local Authority	Comparative Conditions	Evidence
Salford	Michael Dyson Private House Condition Survey gives a wealth of comparative data on conditions of Private Rented Housing against other tenures. In particular: PRS 6.8% non-decent lowest percentage of all tenures. PRS 1.9% Cat 1 HHSRS failures against 0% RSL and 3.2% owner occupiers. Part B Failures. PRS 2.6% against 1.8%RSL and 4.8% Owner Occupier. Part D Failures. PRS 2.3% against 8.1% RSL and 5.0% Owner Occupiers Lots of information on a more anecdotal basis in the SHUSU report detailing issues with: 'what we are finding is that the worst is worse' Living conditions, access, safety concerns, problems with new building and responses to repair requests,	Table 3.32 Decent Homes Failures 216 Page 92 SHUSU – Perspective of the service providers. Page 5 SHUSU 3.4 Living Conditions Pages 15/16/17/18/19.
Wigan	Last house condition survey in Wigan was carried out in 2005 (report attached). 5.5% of PRS properties unfit compared to 10.9% nationally. The majority of poor housing was restricted to older dwellings. The house condition survey of 2005 is now 13 years old and therefore cannot be relied upon to denote current housing conditions in Wigan For what it is worth	Questionnaire Response

Local Authority	Comparative Conditions	Evidence
	PRS 5.5% rate of unfit property against LA at 0.6% RSL at 0% and Owner Occupiers at 2.3%. PRS 24.2% rate of defectiveness against 7.1% RSL's 6.9% LA and 5.9% Owner Occupiers,	2005 House Condition Survey Table 20. Page 22.
Oldham	Most data presented at a 'Private Sector level without a PRS breakdown. Number of non-decent homes in private rented sector has increased from 3,474 in 2010 to 5,947 in 2015. Against Owner Occupied which fell from 17,474 to 9,349 over the same period PRS non-decency at 39.2%	Private Sector Housing Conditions 2010-2015. 6.2, page 7 12.4 Page 13
Bolton	2,548 PRS dwellings have a Cat 1 HHSRS hazard or 15% of all PRS stock. 5% of all private sector housing has an EPC below rating E this rises to 7.4% in PRS PRS is has more HHSRS defects, higher levels of disrepair and more fuel poverty that owner occupied and social rented stock. SAP Rating PRS 58. Owner Occupiers 60. Social Rent 65	BRE Client Report Headline Results for Bolton. Page 4. Table 3 Page 26 Figure 6 Page 27.

Appendix D: What are the demographics of private renters in Greater Manchester, how does this compare?

Local Authority responses

Local Authority	Demographics	Evidence
Manchester City Council	Not a lot here in either document reviewed. (Market Rental Strategy 2015 or Manchester A Housing Strategy 2016 - 2021.	
	The demographics in the MRS in Manchester City cover a wide range of household types ranging from Top 10% of earners to homeless and ex-offenders.	Market Rental Strategy 2015. Market Rented Sector Typologies. Page 4.
Stockport	Not recorded – but probably in line with national trends i.e. more younger people in PRS	Response to questionnaire
	Some general demographics but not specific to PRS such as.	
	92% of population in Stockport identify as white.	Stockport Housing Strategy 2016 – 2021 BME needs. Page 21
	'Over the next few decades, there will be a marked increase in the number and proportion of residents aged 65 and over which is expected to increase by 43.6% from 56,700 in 2015 to 81,400 in 2037'.	Stockport Housing Strategy 2016 – 2021 Supporting Independent living. Page 33.
	'The private rented sector will be playing a growing role in meeting the needs of the "intermediate" market comprising of young economically active residents of the borough offering, as it does, the flexibility to move. It is also now often the only option available to households earning low to medium incomes, households not eligible for social housing or, those who cannot afford to buy. This is reflected in the recent increase in the number of young people accessing private renting as house prices have increased, alongside a corresponding decrease in young owner-occupiers'.	Stockport Housing Strategy 2016 – 2021 The private rented sector Page 40

Local Authority	Demographics	Evidence
	'The sector also plays a growing residual role. With a diminishing social housing stock and increased pressure on remaining stock, private renting provides an important safety net for those in housing need, including accommodation for homeless people, asylum seekers, those in receipt of housing benefit and those who have been evicted from the social housing sector'.	
Trafford	Not much demographic here.	
	'Trafford has a relatively small private rented sector and over the last 16 years or so it has grown at around half the rate of the sector in the rest of GM. Homes that become available for letting tend to be let very quickly suggesting that it is in high demand and mainly meets the needs of households that are not reliant on welfare benefits and who have the resources (such as money for a deposit)'	Trafford Housing Strategy 2018-2023. Growing the private rented sector. Page 18.
	Not specific to PRS but overall Trafford wide demographics on aging is what you would expect.	
	'Trafford has a growing older population. In the next 20 years there will be 73,600 people over the age of 60, this compares with 51,600 in 2015. There will be an additional 10,700 people over the age of 75'.	Trafford Housing Strategy 2018-2023. 2.2.3 Housing for older people. Page 19.
	'Trafford Council with partners has plans to build a new university 'UA92' in Stretford. A detailed master planning exercise is underway and it is intended that this will act as a catalyst for the regeneration of Stretford and Old Trafford.	Trafford Housing Strategy 2018-2023. 2.2.4 Housing for students at a new university Page 20.
	The proposed scheme will deliver new purpose-built student accommodation brought forward in phases from 2020. This purpose-built accommodation is anticipated to house around one third of students, so there will be demand from	

Local Authority	Demographics	Evidence
	students to find accommodation in the private rented sector'	
Salford	Some high-level demographics in the Michael Dyson Private House Condition Survey 2016 as follows: PRS reports vulnerable tenants at 26% against 29% for RSLs and 24% for owner occupiers. Ethnicity. 35.2% who identify as Asian live in PRS. 47.8% who identify as black live in PRS, 28.8% who identify as other live in PRS and 23% who identify as white live in PRS. Income 'Only 1.5% of all households that rent their property privately earn more than £5k per month compared to 4.3% of households who own their property outright. Some anecdotal demographics in the SHUSU report. General demographics of PRS nationally set out with over representation of under 35's, loan parents, BME groups and migrants. Some anecdotal descriptions of asylum seekers and European migrants. Also, descriptions of diverse range of clients including single males, older and younger people, those with mental health issues, women who had experienced separation and/or domestic violence, lone parents, care leavers, migrant workers, refugees and residents with low levels of English. There is no quantitative data in the report.	Michael Dyson Private House Condition Survey 2016. Table 4.3. Page 106. Michael Dyson Private House Condition Survey 2016. Table 4.12. Page 112. Michael Dyson Private House Condition Survey 2016. Table 4.14. Page 113. SHUSU Report. Page 2 Paragraph 2. SHUSU Report. Page 6.
Wigan	Only have information available from Census and house condition survey.	Response to questionnaire.

Local Authority	Demographics	Evidence
	Stock condition survey is too old to be meaningful and only provides some demographic data, but this is not broken down by tenure.	
Oldham	Table 2.2 sets out detailed breakdown of percentage of family types by tenure including data on one-person households, married, dependent children, same sex civil partnerships, cohabiting, loan parents and multi person households.	Welfare Reform: The Impact of the Summer Budget and CSR 2015 on the Social and Private Rented Sector in Oldham. Table 2.2. Page 17.
	Age by tenure PRS 42% of households are aged 16-34 against 11% in owner occupation and 21% in social rent.	Table 2.3 Page 18.
	Economic Activity by tenure. PRS 61% employed against 69% in owner occupation and 36% in social rent.	Table 2.4. Page 18.
	The data is repeated in bar graphs labelled figures 1-8 but the scales are hard to read.	
	Little breakdown of PRS from Private Sector generally in the Private Sector Housing Conditions 2015 Update report.	
	5.5 'younger more mobile private rented sector…'	Private Sector Housing Conditions 2015 Update report. 5.5. Page 6
Bolton	The data is not broken down by PRS specifically therefore it is not possible to draw any meaningful conclusions as to the demographics of private sector renters on Bolton.	

Appendix E: The results from a YouGov survey of private renters living in Greater Manchester, February/ March 2017

Question	Current Private Renter, lives in Greater Manchester
A landlord/agent cutting off a utility without consent for no reason	
Base size:	312
Within the last 12 months	0%
Longer than 12 months ago, within the last 5 years	2%
Longer than 5 years ago	2%
I have never experienced this whilst renting from a private landlord/ agent	94%
Prefer not to say	2%
Don't know/ can't recall	1%
Question	**Current Private Renter, lives in Greater Manchester**
A landlord/agent entering my home without notice/chance to give permission	
Base size:	312
Within the last 12 months	7%
Longer than 12 months ago, within the last 5 years	11%
Longer than 5 years ago	14%
I have never experienced this whilst renting from a private landlord/ agent	63%
Prefer not to say	2%
Don't know/ can't recall	3%
Question	**Current Private Renter, lives in Greater Manchester**
A landlord/agent throwing my belongings out of the home AND changing the locks	
Base size:	312
Within the last 12 months	0%
Longer than 12 months ago, within the last 5 years	0%
Longer than 5 years ago	2%

I have never experienced this whilst renting from a private landlord/ agent	94%
Prefer not to say	2%
Don't know/ can't recall	2%
Question	**Current Private Renter, lives in Greater Manchester**
Being abused/threatened/harassed by a landlord or letting agent	
Base size:	312
Within the last 12 months	4%
Longer than 12 months ago, within the last 5 years	4%
Longer than 5 years ago	7%
I have never experienced this whilst renting from a private landlord/ agent	82%
Prefer not to say	1%
Don't know/ can't recall	3%
Question	**Current Private Renter, lives in Greater Manchester**
Treated unfairly by landlord/agent due to my race/nationality/gender/sexual orientation	
Base size:	312
Within the last 12 months	1%
Longer than 12 months ago, within the last 5 years	2%
Longer than 5 years ago	1%
I have never experienced this whilst renting from a private landlord/ agent	90%
Prefer not to say	2%
Don't know/ can't recall	4%
Question	**Current Private Renter, lives in Greater Manchester**
Paying deposit to a landlord/agent not protected in a Government scheme	
Base size:	312
Within the last 12 months	5%
Longer than 12 months ago, within the last 5 years	11%
Longer than 5 years ago	17%
I have never experienced this whilst renting from a private landlord/ agent	56%

Prefer not to say	2%
Don't know/ can't recall	9%
Question	**Current Private Renter, lives in Greater Manchester**
Net 'landlord acts that are normally illegal': Any of the six things above, in the last 12 months	11.9%
Question	**Current Private Renter, lives in Greater Manchester**
A problem with damp and/or mould	
Base size:	312
Within the last 12 months	31%
Longer than 12 months ago, within the last 5 years	14%
Longer than 5 years ago	13%
I have never experienced this whilst renting from a private landlord/ agent	38%
Prefer not to say	1%
Don't know/ can't recall	3%
Question	**Current Private Renter**
A problem with pests/animal infestations	
Base size:	312
Within the last 12 months	8%
Longer than 12 months ago, within the last 5 years	13%
Longer than 5 years ago	9%
I have never experienced this whilst renting from a private landlord/ agent	67%
Prefer not to say	2%
Don't know/ can't recall	2%
Question	**Current Private Renter, lives in Greater Manchester**
Having electrical hazards	
Base size:	312
Within the last 12 months	16%
Longer than 12 months ago, within the last 5 years	10%
Longer than 5 years ago	7%

I have never experienced this whilst renting from a private landlord/ agent	64%
Prefer not to say	1%
Don't know/ can't recall	2%
Question	**Current Private Renter, lives in Greater Manchester**
Net: any one of the three conditions problems above, in last 12 months	40%
Question	**Current Private Renter, lives in Greater Manchester**
Agree/Disagree: Have been worried about losing my private rented home in P12 months	
Base size:	312
Net: Strongly agree or agree	35%
Question	**Current Private Renter, lives in Greater Manchester**
Agree/Disagree: I expected to be a homeowner by now	
Base size:	312
Net: Strongly agree or agree	56%
Question	**Current Private Renter, lives in Greater Manchester**
Agree/Disagree: Lived in rented home (P5Yrs) with negative impact on child's health	
Base size:	85
Net: Strongly agree or agree	48%
Question	**Current Private Renter, lives in Greater Manchester**
Agree/Disagree: Lived in rented home (P5Yrs) with negative impact on health	
Base size:	312
Net: Strongly agree or agree	29%
Question	**Current Private Renter, lives in Greater Manchester**
Agree/Disagree: Put off/delayed/not had children/more children because privately renting	

Base size:	312
Net: Strongly agree or agree	29%
Question	**Current Private Renter, lives in Greater Manchester**
Agree/Disagree: Want to buy a home, but am unable to save anything towards a deposit	
Base size:	312
Net: Strongly agree or agree	64%
Question	**Current Private Renter, lives in Greater Manchester**
Asked for repairs to be carried out, but they were delayed unnecessarily/never happened	
Base size:	312
Within the last 12 months	29%
Longer than 12 months ago, within the last 5 years	18%
Longer than 5 years ago	10%
I have never experienced this whilst renting from a private landlord/ agent	40%
Prefer not to say	1%
Don't know/ can't recall	2%
Question	**Current Private Renter, lives in Greater Manchester**
Last time rented from a rogue landlord	
Base size:	312
Within the last 12 months	7%
Longer than 12 months ago, within the last 5 years	11%
Longer than 5 years ago, within the last 10 years	7%
Longer than 10 years ago	7%
Not applicable - I have never rented from a rogue landlord	65%
Don't know/ can't recall	3%
Question	**Current Private Renter, lives in Greater Manchester**
Repairs carried out by landlord/agent/someone appointed by them, but done badly	
Base size:	312
Within the last 12 months	17%

Longer than 12 months ago, within the last 5 years	16%
Longer than 5 years ago	10%
I have never experienced this whilst renting from a private landlord/ agent	52%
Prefer not to say	1%
Don't know/ can't recall	4%

Appendix F: What are the main issues for private renters in Greater Manchester, especially low-income renters?

Local authority responses

Local authority	Main Issues	Evidence
Manchester City Council	Manchester's Market Rental Strategy 2015 identifies a range of issues for private renters as follows:	Manchester's Market Rental Strategy 2015.
	NB There is nothing here on affordability.	Page 3
	Fragmented market. Good/Student/Bottom	Page 4
	Reputation of the sector can be blighted by a few rouge landlords	Page 6. Targeted enforcement and rising standards.
	Security of Tenure/Power imbalances. 'We are aware that the insecurity of Assured shorthold tenancies means that tenants can be in a difficult or weak position if seeking to use repairing remedies which in turn can lead to underreporting of the issue' 'Although there is an extensive body of legislation…….in practice rarely effective as intended as the impact of the consequences for the tenant in reporting the breaches can easily outweigh the sanctions against the landlord.	Page 9. Strand 2.
	Condition of Property. 'Where standards are poor it is often the case that there are other issues such as the need for tenant support.	Page 6. Targeted enforcement and rising standards.
	Concentrations of Poor Quality Stock Similarly, there may be a requirement to tackle a concentration of poorer quality and managed market-rental properties in a defined location.	Page 6. Targeted enforcement and rising standards.
	'There remain some areas untouched by rising standards and improved conditions. There are often high levels of low-quality poorly managed market	Page 9 Strand 2.

Local authority	Main Issues	Evidence
	rented properties in these areas that can be both symptoms and causes of detachment from mainstream growth'. **Poor Landlords** 'small number of landlords and agents who despite being made aware of tenancy breaches continue to persistently poorly manage their properties' Manchester's Housing Strategy 2016-2021 Confirms some of the above as follows: 'improving the standards of all our rental properties at the lower end of the sector through engagement with landlords'. 'Poor condition and management standards tackled by effective enforcement' 'Poor quality landlords are marginalised to the point where they improve or leave the market'. 'Poor quality rented homes are concentrated in some neighbourhoods' 'The perceived poor quality of Market-rented homes can be a barrier to families choosing this sector.	Page 9 Strand 2. Page 8. A Diverse and high-quality rental market. Page 20. A Diverse and high-quality rental market. Page 20. A Diverse and high-quality rental market. Page 20. A Diverse and high-quality rental market. Page 20.
Stockport	Poor Conditions/Vulnerability 'A duty is placed on local authorities under both the Housing Act 2004 and Housing & Planning Act 2016 to tackle housing related hazards which present the most serious risk of harm to health. Privately owned and, more particularly, private rented properties are of the most concern in this area due to the high numbers of potentially vulnerable residents who may live in poor housing conditions in the private sector. The BRE (Building Research Establishment) house condition report for 2015 identified that 18% of private rented properties and 12.7% of privately owned properties in Stockport have Cat 1 Hazards'.	Stockport Housing Strategy 2016 – 2021. Private Sector Provision Page 36.

Local authority	Main Issues	Evidence
	Affordability 'The demand for private rented accommodation is such that rents are almost twice that of social rents for comparative property types'.	Private Rented Sector. Page 40.
Trafford	Affordability 'Private rents are also high, the average rent is £750pcm and less than 10% of rents are within the Local Housing Allowance cap (the level covered by Housing Benefit). Many of the existing homes available are out of reach of lower paid workers, vulnerable people and first time buyers. Rents are increasing (by 3.6% in 2016)'. 'Affordability of housing is a problem for a significant proportion of Trafford's households, including those in good paid work with career prospects sometimes referred to as the 'squeezed middle'. To address this, we intend to promote growth in the private rented sector and also to promote more homes in the intermediate market, both for sale and for rent and with greater flexibility to move between the two tenures' Trafford has a relatively small private rented sector and over the last 16 years or so it has grown at around half the rate of the sector in the rest of GM. Homes that become available for letting tend to be let very quickly suggesting that it is in high demand and mainly meets the needs of households that are not reliant on welfare benefits and who have the resources (such as money for a deposit) to move quickly to compete for a home they want. Just 8.2% of market rented homes that come onto the market are available at Local Housing Allowance (LHA) levels Supply. (NB Not just PRS) 'Affordability is not simply fuelled by the popularity of Trafford's markets but also by a lack of supply. The GM Spatial Framework provides a challenging target	 Trafford Council Housing Strategy 2018-2023. Housing market challenges, opportunities and implications. Page 8 Trafford Council Housing Strategy 2018-2023. 2.2.2 Middle income households – growing the intermediate market to rent and buy Trafford Council Housing Strategy 2018-2023. Growing the private rented sector. Page 18. Trafford Council Housing Strategy

Local authority	Main Issues	Evidence
	of 1,155 new homes to be built in Trafford each year. In 2017, 360 new homes were completed which highlights the significant step change required to increase in the level of housing delivery required'.	2018-2023. Housing market challenges, opportunities and implications. Page 8
Salford	**Balance of Property Mix in PRS** 'Only 12% of bungalows are in the rented sector' SHUSU Report. **Insecurity of Tenure** 'Insecurity of tenure was identified as a core characteristic of the current market,…. with shorter tenancies being common' 'Participation across the focus group highlighted that turnover of tenants or 'churn' had accelerated'. 'The instability of a fixed term contract worried some respondents' **Affordability** 'With regards to affordability it was suggested that private rent in neighbourhoods often regarded as the most deprived were paradoxically the least affordable….as the gap between income and rent was much greater' Most of page 7. 'the discrepancy between income and rising rents was identified as a primary issue with rent playing a key role in persistent debt' The introduction of UC was seen to have 'muddied the waters'. Most of Section 3.3 Issues of Affordability is relevant Fees and Deposits Exit Fees Just Getting by the affordability of rent **Power Imbalance**	Michael Dyson 3.6 Dwelling type by household tenure 2016. Page 67. Page 6. Page 6. 3.5. Page 26. Page 6. Page 7. Page 7. Pages 15 and 16

Local authority	Main Issues	Evidence
	'limited choice was a factor in preventing tenants challenging landlords' **Property Condition** 'they felt nit enough was being done with landlords to improve properties where conditions were detrimental to everyday living' Damp and Cold 'by far the most common problem' Problems with access 'for some respondents their location within a block of flats had created access problems in relation to navigating the stairs' Safety Concerns '2 respondents with young children described safety concerns relating to the lack of safety bars or screens across low access windows' Problems with New Builds Interestingly concerns around the condition of properties was not just reserved for those living in older properties' 'problems with damp as their bathrooms had no windows' **Responses to Repairs** **'**Three quarters interviewed described problems getting repairs addressed' **Social Divisions** 'disparity between new high end development and neighbours living in lower demand properties'	Page 7 Page 7. 3.4 Living Conditions Page 19. Page 20. Page 21. Page 21. Page22. The and Us unintended outcomes of re-development. Page 19.
Wigan	From information on PRS tenants on Council's Waiting List as at March 2017. Reason for wanting council housing in descending order:	Response to questionnaire

Local authority	Main Issues	Evidence
	1. Unable to afford 2. Want security of social housing 3. Landlord asked them to leave 4. Property too big/small 5. Property unsuitable Main issue gleaned from helping residents, particularly potentially homeless, is affordability – good quality accommodation at an affordable cost. Particular issues for young, single people with LHA rate in Wigan for under 35s being £57.57 and large families who need 4+ beds. Issue not solely related to rent affordability, also letting agent 'admin' costs for new tenants and those renewing tenancies. Also insecurity of short term tenancies.	
Oldham	The main issue for renters at the bottom end of the market is property standards, especially as most of the affordable rents are located in Selective Licence areas where historically property management has been of a poor standard. The impact of the Benefit Cap in the Private Rented Sector has been more severe because of the higher levels of rent pertaining to this tenure. Our estimate is that 793 families in this tenure will be affected by the cap, losing up to £262 per week. These households have at least 2,503 children; Impact of the Cap in the Private Rented Sector In total 793 households are estimated to be impacted by the cap, including a relatively large number with three children; These 793 households contain at least 2,503 children; and Around £3.2 million of benefits will be withdrawn with weekly losses for households ranging from £25 per week to £262.	Response to questionnaire Welfare Reform: The Impact of the Summer Budget and CSR 2015 on the Social and Private Rented Sector in Oldham Page 5. Page 27. Also see Table 3.3 Page 29.
Bolton	The overall standards in the private rented sector are worse than in the owner occupied sector, and it has the highest predominance of stock condition problems. It is over represented amongst the older	Bolton's Housing Strategy 2013-2017

Local authority	Main Issues	Evidence
	stock, which has the greatest problems of condition and hazards.	Page 12.
	There are many landlords in Bolton who are committed to providing a quality private rented sector through good management practices and continued investment. However, poor property conditions and management can be a result of landlords who lack the necessary skills and knowledge, or landlords who are fully aware of their responsibilities and obligations but choose not to uphold them. Addressing unprofessional management practice is essential in improving standards and making the sector more attractive as a housing option	Page 12

Appendix G: What initiatives are there to support private renters in Greater Manchester? What is lacking?

Local authority responses

G.1 For the local authority responses, we have merged two questions which received similar responses.

G.2 Response from LA's to lack of Social Housing/What are LA's doing to assist with renting in the PRS.

Local Authority	Response	Evidence
Manchester	**Assist with renting in the PRS** **Rebranding** Rebrand to 'market-rental' to address negative impressions of the market. **Actions** **Strand 1 Promote greater self-regulation** Develop a Manchester Renting Pledge Review information on websites **Strand 2 Target and focus enforcement interventions.** Establish localised task force. Increase engagement with troubled families. Identify landlord with highest complaint and develop a carrot and stick approach. Integrate tacking poor landlords into neighbourhood plans. Work with Police, HMRC and Border Agency to improve the sector. **Strand 3 Enhance to role of partners.**	Manchester's Market Rental Sector Strategy 2015. 3. The Importance of High Quality Communications. Page 6. Manchester's Market Rental Sector Strategy 2015. The MRS Strands Strand 1 Page 8. Page 9. Strand 2 Page 10. Page 10. Page 10. Page 10. Page 10.

Local Authority	Response	Evidence
	Strengthen relationships between LA and main private landlord and letting agent's bodies to drive up standards. Involve RP's in engaging in the PRS agenda Pilot selective licencing	Strand 3 Page 11.
	Response to lack of Social Housing The Housing Strategy details a number of action not purely as a response to lack of social housing but the lack of social housing properties has contributed to some of the strategy objectives including: • Building more new homes • Improving pathways into home ownership • Making best use of all our homes. • Informed choice for all	Page 11. Manchester A Housing Strategy 2016-2021. Page 21. Manchester A Housing Strategy 2016-2021.
	Building more new homes Maintain the quantum of social housing using available funding to support the development of specialist and supported housing. Encourage RP's to work with us to deliver new homes.	Page 17.
	Improving pathways into home ownership Work with RP's to deliver low cost home ownership products.	Page 17.
	Making best use of all our homes Use available funding to maintain the quantum of social housing. Use available funding to provide social housing to will support continued independence.	Page 19. Page 23.

Local Authority	Response	Evidence
	Encourage tenants and residents to move to smaller homes and across tenure by providing advice and support.	Page 23.
	Make use of available products to help social tenants onto pathways to home ownership.	Page 23.
	Adopt a more flexible approach to tenancies through use of fixed term tenancies and Rent to Buy schemes.	Page 23.
	Informed choice for all Deliver new homes and pathways to home ownership.	Page 23.
Stockport	**Assist with renting in PRS** Stockport's tenancy deposit scheme run by Stockport Homes helps put a deposit up for those tenants who need help raising a deposit	Response to questionnaire
	Priority 4: Improving Quality in the private sector Strategic aims Promote and increase the supply of a well-regulated, fair, good quality private rented sector To improve the growth of energy efficient and sustainable homes which are free from serious hazards. Action Support owners and landlords in making private homes more energy efficient and in providing safe and healthy living environments Support private landlords in managing and maintaining their homes and effectively	Stockport Housing Strategy 2016 – 2021. Our priorities. Page 55.

Local Authority	Response	Evidence
	tackle poor and illegal practices by landlords and lettings agencies Review relevant private sector policy to inform enforcement, regulate activity and target information. Improve monitoring of PRS complaints received by the Council to highlight problem areas and to target resources adequately. Bring empty homes back into use by targeting and supporting landlords and owners and by the robust use of enforcement where necessary	
	Response to lack of social housing The Council is actively working to increase the number of affordable housing in the Borough by working with developers, land owners and Registered Providers. The Council has established a Housing Delivery Company to accelerate the build rate. Institutional PRS has been introduced in the Borough to increase the supply of PRS and in the Town Centre, almost 300 units are being developed through redevelopment of mainly office blocks through permitted development rights	Response to questionnaire
	Priority 1: Investing in Growth: Increasing Housing Supply, Choice and affordability Strategic aims Increase the provision of good quality housing and maintain a mix of sizes, types and tenures particularly affordable housing to meet as wide a range of needs as possible Create healthy, mixed, sustainable communities which complement and benefit existing communities. Actions	Stockport Housing Strategy 2016 – 2021. Our priorities. Page 52.

Local Authority	Response	Evidence
	Develop new housing delivery mechanisms, including a new housing development company, to drive the delivery of housing and increase the supply of affordable, and in particular, affordable rented accommodation Contribute to and support the emerging Stockport Local Plan and associated planning policy documents. Ensure that the issues of affordable housing, allocations, land availability and housing policies are reflected adequately and prioritised in the emerging Local Plan Work with Registered Providers and private developers to ensure the right housing is built in the right place at the right time Look to increase the supply of first time and family sized accommodation. Work with partners on the joint delivery of new housing under Greater Manchester Combined Authorities initiatives such as the Spatial Framework and the Investment Fund Improve our understanding of the housing needs of older people and those with other specialist housing needs and promote delivery of housing to meet those needs	
Trafford	Assist with renting in the PRS HOST has funding in place to help clients with deposits etc. to secure PRS. We work closely with Salix Living to source accommodation mainly in the Salford area to re-house our clients. HOST are working closely with Trafford Council's empty property team to help address this issue and help bring empty properties back into housing use. We are	Response to questionnaire

Local Authority	Response	Evidence
	networking with landlords and agents to help build a portfolio of landlords. PRS Stock Condition Survey We are hoping to commission a Private Sector Stock Condition survey by the end of this year. The last one undertaken was in 2007 so is out dated.	Response to questionnaire
	Salix Homes Salix Living is the PRS arm of Salix Homes. They are operating a Social Lettings Model in Salford with some properties being offered in Trafford in partnership with HOST. HOST have utilised this function to discharge the statutory homelessness function to 7 households as well as preventing 10 households from becoming homeless. Salix Living and HOST have worked to procure 6 extra units of temporary accommodation with the aim of ceasing the use of bed and breakfast accommodation in Trafford. Jonathan Drake is the Head of Salix Living if you want to contact him directly (jonathan.drake@salixhomes.org) HOST Bond Scheme HOST operate a bond scheme (cash and cashless) to incentivise private landlords to rent out their properties to clients who have presented with a housing need. The Rental Bond Scheme is a certificate that is issued to the Landlord of a property, replacing a cash deposit requirement from the tenant. The Bond states that if a tenant causes a Landlord any financial loss then he may claim against the value of the Rental Bond. During 2017/18, 18 bonds were issued. This is a 100% increase from 2016/17 when no new bonds were issued. The bond scheme has been revised and has seen the introduction of cash bonds. HOST provided a Cash Deposit and Bond Scheme service for clients who are seeking	Response to email

Local Authority	Response	Evidence
	PRS. We can assist with a paper bond or cash deposit to assist with deposits. We can also help to cover the cost of rent in advance or fees to help secure suitable and affordable PRS for our clients. We can also provide furniture packages but this does depend on the needs and what resources we have. For example, someone in our emergency accommodation who doesn't have any furniture and we have secured suitable PRS accommodation would be given assistance. We also have tenancy support officer who we can utilise to help someone settle into their tenancies. The thing that we lack in is that there is a lack of affordable PRS in Trafford and a lack of landlords that are willing to accept DSS. Continue to work with local landlords within the Private Rented Sector to improve standards Establish a multidisciplinary approach to both identifying and addressing problems in the private sector Deploy our statutory and non statutory powers to address poor standards and conditions in line with our evidence base Improve liaison and links with private landlords through the establishment of a Private Landlords Forum Explore and as appropriate introduce a Landlord Accreditation Scheme with a particular emphasis upon those properties and landlords in and around the new university Explore the need and requirement (or not) for Selective Licensing Develop a new Empty Property Strategy and action plan Explore affective and cost efficient ways and mechanisms of bringing empty properties back into use (inc. EDMOs / enforced sales / acquisition / assistance)	

Local Authority	Response	Evidence
	Work proactively with private sector landlords to secure more accommodation for homeless households, including the use of incentives, bonds, enhanced tenant support and advice	
	Response to lack of social housing	Trafford Housing Strategy 2018-2023.
	Increase housing delivery (Market & Affordable)	
	Develop and introduce a set of community driven Place Plans incorporating town centre, neighbourhood and master plans to help inform and shape the development both the Local Plan and in turn future development itself	4.4. Page 36 5.2. Page 36
	Develop a master-plan led approach to new sites and development opportunities (of appropriate scale)	5.3. Page 36
	Partner with the private sector (including registered providers) to deliver new homes	
	Identify, utilise and deploy Council assets (land and buildings) to bring forward more sites for residential development	5.4 Page 36
	Utilise and deploy our CPO powers to acquire strategically significant sites / assets and bring them forward for development	
	Proactively identify, negotiate and where appropriate acquire sites to speed up development	5.5 Page 36
	Where appropriate package sites to deliver more housing / improved mix / improved viability	
	Research and explore opportunities to deliver more self and customer build properties	5.6 Page 36
	Research and explore opportunities to deliver accommodation through non-traditional methods of construction	5.7 Page 36
	Work with investors to deliver more bespoke build to rent accommodation	5.8 Page 36

Local Authority	Response	Evidence
	Regularly review and up-date our evidence base to accurately inform the appropriate mix, type and location for affordable housing Research and explore the potential in Trafford for Community Land Trusts Introduce and extend the type and range of affordable housing products to meet all housing needs Research and develop new financial products and support to help local people access homes to rent and buy Establish a Trafford Housing Fund to provide additional financial support for housing priorities as identified through the housing propositions Rebalance the housing offer across Trafford Develop a set of "Housing Propositions" for each of Trafford's places and communities Establish a future "vision" for each place Regularly review our evidence base and through this establish the appropriate number, level and type of new homes needed in each of Trafford's places in order to rebalance the market Provide guidance on the appropriate housing densities in relation to their proximity to services and key transport hubs Support the increase and improvement of connectivity (particularly transport links) within and across the borough Identify and target sources of external and match funding including maximising receipts from planning gain	6.4 Page 37 Trafford Housing Strategy 2018 – 2023 Actions 1.1 to 1.15 Pages 33-34. Trafford Housing Strategy 2018 – 2023 Action 2 to 2.5 Page 35.
Salford	**Assist with PRS** Creation of Private Sector Leasing Scheme. Grants of up to £12,500 offered to landlords in return for social lettings	Cover letter and Info Pack for Private Sector Lease.

Local Authority	Response	Evidence
Wigan	**Assist with PRS** Council's Housing Options team provides assistance to those given notice to leave a private tenancy. Council commissions a bond scheme from its social lettings agency to support those who can't afford a deposit. Social lettings agency provides around 170 properties in the sector which are well maintained and managed. SERCO contract for asylum seeker accommodation across GM. Need more landlords willing to take on those with a bond and good quality HMOs. Engaging with landlords and letting agents to better understand the PRS, considering options for a sustainable social lettings agency with an increased portfolio of properties, developing options on updating the stock condition data, improving complaints reporting and recording, support for landlords on letting agents on the implementation of UC full service, developing a deal for landlords which is likely to include a rent guarantee scheme, increased use of the bond scheme. **Response to lack of social housing** New build programme to increase social housing, developing options to unlock residential markets in the town centres, review/refresh the empty homes strategy.	Response to questionnaire
	2026 Strategic Aims. NB The Objectives are in an action plan that is now 7 years out of date so I have not included them. New housing development is linked to development and growth.	Response to questionnaire
	There are sufficient homes of the right type and location to meet the needs of the community.	Vision 2026

Local Authority	Response	Evidence
	A range of affordable housing is available to meet the needs of emerging households and growing families. A choice of specialist housing and support is available to meet the needs of the elderly, disabled and other vulnerable people in order that they can live more independently Agencies work together to provide advice and support to tackle the underlying causes of homelessness	Page 30. Page 30. Page 30. Page 44. Page 44.
Oldham	**Supporting PRS** We are on the brink of introducing a Pilot Bond scheme to support landlords in letting their properties, as well as offering extra support in negotiating with DWP and other statutory service. This will tie nicely into Selective License which also designed to provide advice and support. Oldham recognises the huge part the private market has to play in housing supply, hence why we have developed the Bond offer to landlords. It will initially run as a pilot however, we recognise its potential to grow and provide better access into the private sector.	Response to questionnaire Response to questionnaire
Bolton	**Supporting PRS** Continue to seek and secure resources for all private sector housing activity. Work with private rented sector partners through the Joint Services Group to ensure that standards are upheld and access to the sector is increased. Continue to take a proactive approach to tackling poor condition, management	Housing Strategy 2013-17 Page 13 Page 13

Local Authority	Response	Evidence
	standards and empty properties including enforcement action where necessary.	
	Review the Private Sector Housing Strategy and delivery plans.	Page 13
	Increase knowledge and understanding of the sector to assist with attracting investment and providing an alternative to social rented and owner occupation	Page 13
	Expansion of the Lease Management Service.	Page 13
	Response to lack of social housing The Council will work with Registered Providers and Elected Members to identify a pipeline of sites suitable for housing development and in particular affordable housing.	Page 13
	Develop alternative models for delivering affordable housing including the Greater Manchester Pension Scheme model, market rent, alternative financing etc.	Page 10.
	Continue to support tenants who wish to move to more affordable or appropriate accommodation by making the best use of existing stock and increasing the housing options available including the private rented sector and lease management.	Page 11.

Appendix H: What are the issues that landlords see in the sector in Greater Manchester?

Local authority response

Local Authority	Issues	Evidence
Trafford	Welfare reform which puts off landlords particularly the role out of Universal Credit. Ever tightening rules and regulations regarding admin fee's, deposit protection and section 21 rules which landlords see as frustration.	Response to questionnaire
Stockport	Failure of tenants to pay rent Properties being damaged/ vandalised	Response to questionnaire
Wigan	Certainly, Universal Credit. Refreshing our engagement with landlords and letting agents in Wigan including relaunching a landlord forum next month. Session will include views on challenges and opportunities in the sector.	Response to questionnaire
Oldham	The two main issues for landlords in Oldham are Selective Licensing because they feel hard done by, the other is UC due to uncertainty and lack of understanding especially with Oldham being a Full-Service borough.	Response to questionnaire

Appendix I: What are the main barriers for private renters (especially low-income renters) accessing the PRS in Greater Manchester?

Local authority Responses

Local Authority	Barriers to Private Renters	Evidence
Manchester	**Reputation** Too often in the past there have been mixed messages and a generally negative impression of the sector….deterred potential residents. The perceived poor quality of market rental homes can be a barrier to families choosing this sector. **Geographical concentrations – properties not always in the 'right place'** Poor quality rented homes are concentrated in some neighbourhoods. **Affordability** LHA and the benefit system are having an impact we cannot yet fully assess.	Manchester's Market Rented Sector Strategy 2015. Manchester A Housing Strategy 2016-2021. Page 20. Manchester A Housing Strategy 2016-2021. Page 20. Manchester A Housing Strategy 2016-2021. Page 20.
Stockport	Landlords are more selective due to the demand of PRS and therefore are reluctant to accept tenants on benefits.	Response to questionnaire
Trafford	In Trafford it is the lack of affordable PRS and lack of landlords willing to accept DSS.	Response to questionnaire
Salford	Balance of Property Mix in PRS 'Only 12% of bungalows are in the rented sector' **Insecurity of Tenure**	Michael Dyson 3.6 Dwelling type by household tenure 2016. Page 67. SHUSU Report

Local Authority	Barriers to Private Renters	Evidence
	'Insecurity of tenure was identified as a core characteristic of the current market,…. with shorter tenancies being common' 'Participation across the focus group highlighted that turnover of tenants or 'churn' had accelerated'. 'The instability of a fixed term contract worried some respondents' Affordability 'With regards to affordability it was suggested that private rent in neighbourhoods often regarded as the most deprived were paradoxically the least affordable….as the gap between income and rent was much greater' Most of page 7. 'the discrepancy between income and rising rents was identified as a primary issue with rent playing a key role in persistent debt' The introduction of UC was seen to have 'muddied the waters'. Most of Section 3.3 Issues of Affordability is relevant Fees and Deposits Exit Fees Just Getting by the affordability of rent	Page 6. Page 6. 3.5. Page 26. Page 6. Page 7. Page 7. Pages 15 and 16
Wigan	From experience – quality of accommodation and affordability/LHA rates, availability of suitable accommodation, landlords willing to take those on benefits.	Response to questionnaire

Local Authority	Barriers to Private Renters	Evidence
	From information on PRS tenants on Council's Waiting List as at March 2017. Reason for wanting council housing in descending order: 1. Unable to afford 2. Want security of social housing 3. Landlord asked them to leave 4. Property too big/small 5. Property unsuitable Main issue gleaned from helping residents, particularly potentially homeless, is affordability – good quality accommodation at an affordable cost. Particular issues for young, single people with LHA rate in Wigan for under 35s being £57.57 and large families who need 4+ beds. Issue not solely related to rent affordability, also letting agent 'admin' costs for new tenants and those renewing tenancies. Also insecurity of short term tenancies.	
Oldham	The barriers for renters are partly market rent but mostly UC, as more and more agents and landlords are hesitant to let to tenants claiming UC. **Affordability** The impact of the Benefit Cap in the Private Rented Sector has been more severe because of the higher levels of rent pertaining to this tenure. Our estimate is that 793 families in this tenure will be affected by the cap, losing up to £262 per week. These households have at least 2,503 children; Impact of the Cap in the Private Rented Sector In total 793 households are estimated to be impacted by the cap, including a relatively large number with three children; These 793 households contain at least 2,503 children; and	Response to questionnaire Welfare Reform: The Impact of the Summer Budget and CSR 2015 on the Social and Private Rented Sector in Oldham Page 5. Page 27. Also see Table 3.3 Page 29.

Local Authority	Barriers to Private Renters	Evidence
	Around £3.2 million of benefits will be withdrawn with weekly losses for households ranging from £25 per week to £262.	
Bolton	**Affordability** '59% of newly forming households cannot afford to buy a home or rent privately'. **Condition of Stock** The overall standards in the private rented sector are worse than in the owner-occupied sector, and it has the highest predominance of stock condition problems. It is over represented amongst the older stock, which has the greatest problems of condition and hazards.	Bolton's Housing Strategy 2013-2017 Housing need and access Page 7. Private Sector Stock Condition. Page 8.