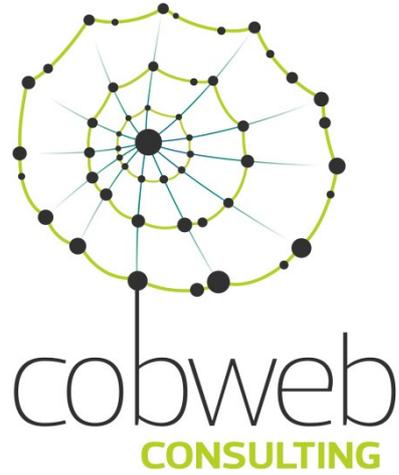




University
of Glasgow



The private rented sector in South East London and Lambeth

A study for South East London Housing Partnership and LB
Lambeth

Borough summaries

December 2014

South East London

housing partnership



Lambeth

BEXLEY – a summary of results

In Bexley 93 interviews were achieved, from locations well spread across the borough. As a relatively small sample the maximum statistical error at the 95% level is +/-10.1%. This summary compares the results in Bexley against the total sample of 1,165 so that Bexley may be related to the overall situation within South East London and Lambeth, the study area. Weighted figures are used for the total sample to remove any bias due to uneven sample sizes across the six boroughs.

Profile

The sample in Bexley was 46% male and 53% female. The age breakdown was close to the average for the study but there was a higher proportion of White British respondents (65% compared with 40% overall) and fewer Other White. Black, Asian and Mixed ethnic groups were found in very slightly lower proportions than the average. Disability was a little higher and Bexley had the highest proportion of part time workers within an overall average level of employment.

Residence and tenancy

Bexley has the highest proportion of longer term residents, those who had been in the same property for five years or more.	Total	Bexley	Length of time in property
	%	%	
	29	29	Less than a year
	31	31	1-2 years
	26	20	2 – 5 years
	8	14	5 – 10 years
	4	4	More than 10 years

It also has above average proportions with tenancy agreements for one year or longer.	Total	Bexley	Length of tenancy agreement
	%	%	
	4	4	Monthly ¹
	17	11	Six months
	62	66	One year
	8	12	Longer than one year
	6	4	Do not have an agreement

Both of these indicate a little more stability in the PRS in Bexley than in the study area as a whole. An average percentage (14%) of properties were judged to be ex-Right to Buy.

Household composition

Bexley has an above average proportion of households which include children 16 or under – 46% compared with 40% overall. Some 7% were students sharing with others, a little more than the 4% average.	Total	Bexley	Household composition
	%	%	
	28	23	Single adult
	10	14	One adult with one or more children
	18	14	Two adults living as couple, no children
	30	32	Two adults living as couple, with child(ren)
	8	8	Other family group
	7	8	Other situation
	3	5	Adult(s) 65+ present

¹These will be mainly Assured Shorthold Tenancies where the initial period has expired, and the tenancy has 'run on' on a monthly basis without a formal renewal

Houses in multiple occupation

At 19% the proportion of HMOs in the Bexley sample was below the average of 25%. Eighty percent of those properties contained two or three households.

Facilities were shared with other households on an average basis. The figure for sharing bedrooms looks high but as the sample is so small a percentage is unreliable - it is only three households out of the fifteen for which there are data. 33% of these HMO households use all of their available rooms as bedrooms, compared with 38% in total.	Total	Bexley	Facilities shared within HMO
	%	%	
	72	73	Kitchen/cooking facilities
	71	73	Bathroom/toilet
	50	53	Living room
	6	20	Bedrooms
	<1	0	Other
16	13	No facilities shared	

Opinions of the property and surrounding area

The quality and condition of accommodation in Bexley were rated very slightly above average. The identification of Category 1 hazards tended to be slightly lower, with the exception of overcrowding. This was put at 9% compared with the average of 7%.

The quality of the local environment received the best rating in Bexley – generally 'good' to 'very good' compared with 'good' to 'fair' in other boroughs.	Total	Bexley	Quality of local environment
	%	%	
	13	22	Very good
	53	56	Good
	27	12	Fair
	5	5	Poor
2	5	Very poor	

Anti-social behaviour was noted at only an average level in Bexley. Noise nuisance was the most likely complaint but it was still at a lower level than in any other area.

Property management

Bexley has the highest proportion who deal with agents rather than directly with a landlord but the differences are small.	Total	Bexley	Who deals with accommodation?
	%	%	
	72	69	Directly with the landlord
27	31	Through a letting or estate agent	

Opinions of all three aspects of property management are higher in Bexley. This is particularly true for general attitudes and response to repairs where there are noticeably more 'good' ratings and fewer 'fair', 'poor' and 'very poor'. As agents are rated less favourably than landlords generally and Bexley has a higher proportion of agents, less favourable ratings might have been expected. This suggests that property management standards are genuinely higher in Bexley.

			Very good	Good	Fair	Poor	Very poor
The way the property is managed and maintained	Total	%	13	53	28	4	1
	Bexley	%	19	52	23	3	3
General attitude and helpfulness	Total	%	21	52	19	5	2
	Bexley	%	22	62	12	3	1
Response to requests for repairs	Total	%	22	48	21	6	3
	Bexley	%	23	62	11	3	1

Tenants in Bexley were less likely to have to make advance payments to secure their accommodation and the rates they did pay were well below average.	Total	Bexley	Entry fees and advance payments
	£	£	
	285	243	Agents' fees
	974	843	Deposit
	971	801	Advance rent

A smaller proportion had contacted the Council about their property – 8% compared with an average of 12%. This was seven people and only three of them were actually concerned with condition or tenancy issues.

Rent, income and benefits.

Generally, rents in Bexley are significantly lower than the average for the study area. However, they are based on small numbers, particularly the HMOs and the 4 bedroom properties, so subject to greater variation.

Average rents paid	HMOs		Non HMO	
	Total	Bexley	Total	Bexley
	£		£	
One bedroom	610.71	675	792.39	635.33
Two bedrooms	836.81	729.17	953.20	780.61
Three bedrooms	908.79	728.75	1,115.04	903.68
Four bedrooms	903.55	300	1,293.81	975
Five bedrooms	581.82	-	1,450.00	-
Six bedrooms	410.00	-	2,000.00	-

Bexley has a slightly higher proportion of people who receive Housing Benefit, 29% compared with the average of 24%. It is also more likely that this is full rather than partial benefit.

	Total	Bexley	Gross household income per year
	%	%	
Bexley has a higher proportion of people in the higher income bracket – 25% earn in excess of £36,400 per year. This is more than in any other of the authority areas.	3	2	Under £5,200
	10	10	£5,200 - £10,400
	16	19	£10,401 - £15,600
	15	10	£15,601 - £20,800
	14	12	£20,801 - £26,000
	15	10	£26,001 - £31,200
	9	12	£31,201 - £36,400
	6	15	£36,401 - £41,600
	4	5	£41,601 - £46,800
	8	5	Over £46,800

The proportion of people receiving benefits and the nature of those benefits was very similar in Bexley to the average figures.

Property history

	Total	Bexley	Location of previous home
	%	%	
Bexley has the highest proportion who have moved into the area from another London borough. They are most likely to have come from Greenwich (12%), or Lewisham (8%) with a few also from Brent, Bromley, Barking and Dagenham, Croydon, Redbridge, Southwark and Tower Hamlets.	45	44	Same Borough
	31	37	Other London Borough
	11	13	Outside London but in South East
	6	2	Elsewhere in the UK
	7	4	Outside the UK

The pattern of previous tenures was very similar to the average with the majority (80%) moving from another privately rented property and most of the remainder moving out of their parent's/family home.

Future intentions

Some 20% thought it 'very' (11%) or 'fairly' (9%) likely that they would move in the next year. Almost half expected to remain in Bexley but those (4 people) who were considering another borough mentioned: Greenwich, Southwark, Tower Hamlets and Wandsworth.

<p>Tenure expectations for the future are similar in Bexley to the average, except for an absence of any social renting. The sample is small and therefore subject to wider variation but continued private renting or a move into home ownership are the main expectations. Recalling that incomes amongst the Bexley sample tend to the higher end suggests that these people would probably find it easier to access home ownership than many others in the study.</p>	Total	Bexley	Expected tenure of next home
	%	%	
	23	17	Buy own home
	5	6	Buy a shared ownership property
	41	50	Rent from Private landlord
	19	0	Rent from Council or HA
	1	0	Have accommodation provided by employer
	3	6	Move in with friends or family
	2	0	Some other arrangement
	7	22	Don't know

BROMLEY – a summary of results

In Bromley 96 interviews were achieved, from locations well spread across the borough. As a relatively small sample the maximum statistical error at the 95% level is +/-10%. This summary compares the results in Bromley against the total sample of 1,165 so that Bromley may be related to the overall situation within South East London and Lambeth, the study area. Weighted figures are used for the total sample to remove any bias due to uneven sample sizes across the six boroughs.

Profile

The sample in Bromley was 41% male and 58% female. Within the age breakdown there were slightly more people over 50 and fewer in the 25 – 34 range than in the sample overall. There is also a higher proportion of White British/Irish respondents (56% compared with 40% overall) Disability was a little above average, which may reflect the slightly older age profile. Similarly, there were a few more retired people and slightly fewer in employment.

Residence and tenancy

Bromley has the highest proportion of tenants who had been in the same property for ten years or more.	Total	Bromley	Length of time in property
	%	%	
	29	33	Less than a year
	31	27	1-2 years
	26	25	2 – 5 years
	8	2	5 – 10 years
	4	13	More than 10 years

Bromley seems to have a much higher proportion of people with six monthly tenancy agreements, although this may just be variation due to a relatively small sample size.	Total	Bromley	Length of tenancy agreement
	%	%	
	4	3	Monthly ²
	17	29	Six months
	62	53	One year
	8	6	Longer than one year
	6	8	Do not have an agreement

Bromley has a relatively low proportion of properties which were judged to be ex-Right to Buy (5% compared with an average of 15%).

Household composition

Bromley has the highest proportion of single parents and of households containing older people, although the differences are small.	Total	Bromley	Household composition
	%	%	
	28	26	Single adult
	10	15	One adult with one or more children
	18	26	Two adults living as couple, no children
	30	25	Two adults living as couple, with child(ren)
	8	8	Other family group
	7	0	Other situation
	3	7	Adult(s) 65+ present

²These will be mainly Assured Shorthold Tenancies where the initial period has expired, and the tenancy has 'run on' on a monthly basis without a formal renewal

Houses in multiple occupation

At 14% the proportion of HMOs in the Bromley sample was the lowest in the study. More than half of those properties (seven out of thirteen) contained only two households.

Facilities were shared much as for other HMOs but the small sample makes percentages unreliable. 46% of these HMO households use all of their available rooms as bedrooms, compared with 38% in total.	Total	Bromley	Facilities shared within HMO
	%	%	
	72	67	Kitchen/cooking facilities
	71	67	Bathroom/toilet
	50	67	Living room
	6	0	Bedrooms
	<1	0	Other
16	33	No facilities shared	

Opinions of the property and surrounding area

In relation to both the quality and condition of accommodation, tenants in Bromley tended to give fewer 'very good' ratings but more 'good' ones than those in other areas. The overall result though, was an average score the same as the full sample. The most frequently identified Category 1 hazard was damp and mould growth. This was mentioned by one in four people, slightly more than the average one in five.

The quality of the local environment was slightly less well regarded in Bromley and had the highest proportion giving a 'poor' or 'very poor' rating. Rubbish left uncollected was the main reason for this.	Total	Bromley	Quality of local environment
	%	%	
	13	8	Very good
	53	52	Good
	27	26	Fair
	5	9	Poor
2	4	Very poor	

The incidence of anti-social behaviour was noticeably higher in Bromley, 23% compared with no more than 14% in any other area. This is still within the possible range of error (+/- 10%) associated with the relatively small sample size. Noise nuisance was the most likely complaint.

Property management

Bromley has slightly more people dealing directly with a landlord rather than an agent but the differences are small.	Total	Bromley	Who deals with accommodation?
	%	%	
	72	76	Directly with the landlord
27	23	Through a letting or estate agent	

Opinions of all three aspects of property management show patterns very similar to the average in Bromley. The only possible difference to note is that on the way the property is managed and maintained attracts fewer 'very good' ratings and more 'good', as with the quality and condition of properties.

			Very good	Good	Fair	Poor	Very poor
The way the property is managed and maintained	Total	%	13	53	28	4	1
	Bromley	%	6	63	21	7	0
General attitude and helpfulness	Total	%	21	52	19	5	2
	Bromley	%	26	52	17	2	0
Response to requests for repairs	Total	%	22	48	21	6	3
	Bromley	%	24	50	17	4	0

The expectation for advance payments to secure their accommodation was no different from the sample average in Bromley but the rates they paid were well below average.	Total	Bromley	Entry fees and advance payments
	£	£	
	285	246	Agents' fees
	974	837	Deposit
	971	802	Advance rent

Some 15% said they had contacted the Council about their property but only one person mentioned a problem with their landlord; other references were not really condition or tenancy issues.

Rent, income and benefits.

Generally, rents in Bromley are significantly lower than the average for the study area. However, they are based on small numbers, particularly the HMOs and the 4 bedroom properties, so subject to greater variation.

Average rents paid	HMOs		Non HMO	
	Total	Bromley	Total	Bromley
	£		£	
One bedroom	610.71	424.29	792.39	679.8
Two bedrooms	836.81	400	953.20	797.7
Three bedrooms	908.79	1083.33	1,115.04	900.56
Four bedrooms	903.55	-	1,293.81	1333.33
Five bedrooms	581.82	-	1,450.00	-
Six bedrooms	410.00	-	2,000.00	-

Bromley has the highest proportion of people who receive Housing Benefit, 34% compared with the average of 24%. But only 8% are receiving full benefit.

The income distribution in Bromley is tilted towards the lower end of the scale – only 2% earn in excess of £36,400 per year. This is lower than in any other of the authority areas.	Total	Bromley	Gross household income per year
	%	%	
	3	2	Under £5,200
10	8	£5,200 - £10,400	
16	18	£10,401 - £15,600	
15	13	£15,601 - £20,800	
14	8	£20,801 - £26,000	
15	14	£26,001 - £31,200	
9	3	£31,201 - £36,400	
6	1	£36,401 - £41,600	
4	0	£41,601 - £46,800	
8	0	Over £46,800	

People in Bromley were more likely to be receiving benefits than in other areas but the type of benefits were similar to the average pattern.

Property history

Bromley has a slightly higher proportion who have moved into the area from elsewhere in the UK. Where they have moved from another London borough it is most likely to have been Lewisham (13%) or Lambeth (7%) with a few also from Bexley, Brent, Croydon, Ealing, Greenwich, Merton, Redbridge, Southwark and Wandsworth.	Total	Bromley	Location of previous home
	%	%	
	45	44	Same Borough
31	30	Other London Borough	
11	12	Outside London but in South East	
6	12	Elsewhere in the UK	
7	3	Outside the UK	

The pattern of previous tenures was very similar to the average with the majority (85%) moving from another privately rented property and most of the remainder moving out of their parent's/family home.

Future intentions

Some 18% thought it 'very' (12%) or 'fairly' (6%) likely that they would move in the next year. The largest group (41%) expected to remain in Bromley but those (5 people) who were considering another borough mentioned: Croydon, Lambeth, Lewisham and Waltham Forest.

	Total	Bromley	Expected tenure of next home
	%	%	
Bromley has fewer than the average who expect their next move to be into home ownership (although a higher interest in shared ownership) and more who intend to remain within the PRS. This probably reflects the income distribution towards the lower end of the scale.	23	12	Buy own home
	5	12	Buy a shared ownership property
	41	53	Rent from Private landlord
	19	18	Rent from Council or HA
	1	0	Have accommodation provided by employer
	3	0	Move in with friends or family
	2	0	Some other arrangement
	7	6	Don't know

GREENWICH – a summary of results

In Greenwich 224 interviews were achieved, from locations well spread across the borough. The maximum statistical error for a sample of this size, at the 95% level, is +/-6.5%. This summary compares the results in Greenwich against the total sample of 1,165 so that Greenwich may be related to the overall situation within South East London and Lambeth, the study area. Weighted figures are used for the total sample to remove any bias due to uneven sample sizes across the six boroughs.

Profile

The sample in Greenwich was 52% male and 48% female and the age breakdown was close to the average for the study. Greenwich had the lowest proportion of White British respondents (29% compared with 40% overall) and one of the lowest for Other White (12%). As a result, most of the other ethnic groups were in higher proportion, particularly the Other Asian and Black African. Disability and employment status were both similar to the average for the sample as a whole.

Residence and tenancy

	Total	Greenwich	Length of time in property
	%	%	
Greenwich has slightly more people who have lived in their current property for two years or more.	29	27	Less than a year
	31	31	1-2 years
	26	29	2 – 5 years
	8	11	5 – 10 years
	4	3	More than 10 years

	Total	Greenwich	Length of tenancy agreement
	%	%	
The pattern of length of tenancy agreements is broadly similar to the average.	4	6	Monthly ³
	17	13	Six months
	62	64	One year
	8	9	Longer than one year
	6	5	Do not have an agreement

The proportion of properties judged by the interviewers to be ex-Right to Buy was very low in Greenwich, only 2% compared with 15% for the sample as a whole.

Household composition

	Total	Greenwich	Household composition
	%	%	
Greenwich has a lower proportion of single adults and more of the other family groups and other situations. This may be partly due to the ethnic breakdown showing more African and Asian families.	28	22	Single adult
	10	9	One adult with one or more children
	18	14	Two adults living as couple, no children
	30	33	Two adults living as couple, with child(ren)
	8	14	Other family group
	7	10	Other situation
Students sharing with others were found to be 5% of the sample, very similar to the average.	3	5	Adult(s) 65+ present

³These will be mainly Assured Shorthold Tenancies where the initial period has expired, and the tenancy has 'run on' on a monthly basis without a formal renewal

Houses in multiple occupation

In the Greenwich sample 23% of the properties were HMOs. Just over half of those properties contained three households and the others were divided between two and four or more.

Greenwich had the highest levels of sharing of kitchens and bathrooms and was the only area where all the HMOs shared at least one of the facilities. 23% of these HMO households use all of their available rooms as bedrooms, compared with 38% in total.	Total	Greenwich	Facilities shared within HMO
	%	%	
	72	82	Kitchen/cooking facilities
	71	82	Bathroom/toilet
	50	49	Living room
	6	5	Bedrooms
	<1	0	Other
	16	0	No facilities shared

Opinions of the property and surrounding area

For both quality and condition of accommodation tenants in Greenwich tended to offer more 'good' ratings and slightly fewer 'very good' or 'fair' ratings but the overall patterns were similar to others.

The identification of Category 1 hazards was at its lowest in Greenwich properties, with the exception of poor security, poor sanitation and electrical or fire hazards. But for these it was the same or just one percent above the average so Greenwich could be said to be best regarded overall for Category 1 hazards in general.	Total	Greenwich	Existence of severe problems
	%	%	
	21	13	Damp or mould growth
	3	1	Excess heat
	9	6	Excess cold/lack of heating
	7	2	Overcrowding or lack of space
	8	9	Poor security/risk of intrusion
	3	4	Poor sanitation/problems with water supply
	3	1	Hazards likely to cause trips, falls or injury
	2	2	Electrical or fire hazards

The same pattern was seen in rating the quality of the local environment – more 'good' and fewer 'very good' and 'fair'. Dissatisfaction was slightly below average.	Total	Greenwich	Quality of local environment
	%	%	
	13	10	Very good
	53	64	Good
	27	22	Fair
	5	3	Poor
2	1	Very poor	

Anti-social behaviour was noted at only an average level in Greenwich (13% compared with 14% overall). But drunken behaviour and loitering or begging were both more of a problem in Greenwich than anywhere else.

Property management

Management arrangements in Greenwich are similar to the sample as a whole.	Total	Greenwich	Who deals with accommodation?
	%	%	
	72	74	Directly with the landlord
27	25	Through a letting or estate agent	

The rating of all three aspects of property management area little above average in Greenwich. This is evidenced by the higher proportions of 'good' rather than 'fair' ratings and the lower levels of poor ratings.

			Very good	Good	Fair	Poor	Very poor
The way the property is managed and maintained	Total	%	13	53	28	4	1
	Greenwich	%	12	60	23	3	2
General attitude and helpfulness	Total	%	21	52	19	5	2
	Greenwich	%	21	63	15	1	<1
Response to requests for repairs	Total	%	22	48	21	6	3
	Greenwich	%	20	58	15	2	3

There was an average likelihood of tenants in Greenwich having to pay deposits and rent in advance but they were slightly less likely to be faced with agents' fees. When they did pay any of these the amounts were well below average and more allied to those in Bexley and Bromley than in the other three boroughs..	Total	Greenwich	Entry fees and advance payments
	£	£	
	285	248	Agents' fees
	974	875	Deposit
971	870	Advance rent	

The level of contact with the Council about their property was much the same as in other areas, 13% compared with 12%. As in other areas, only a small proportion actually related to condition or tenancy issues. One person referred to overcrowding.

Rent, income and benefits.

Generally, rents in Greenwich are lower than the average for the study area. However, the figures for the larger HMOs (three bedrooms and larger) are based on small numbers so should be read with caution.

Average rents paid	HMOs		Non HMO	
	Total	Greenwich	Total	Greenwich
	£		£	
One bedroom	610.71	521.84	792.39	713.79
Two bedrooms	836.81	728.75	953.20	954.25
Three bedrooms	908.79	481.11	1,115.04	1065.66
Four bedrooms	903.55	900	1,293.81	1202.78
Five bedrooms	581.82	687.5	1,450.00	-
Six bedrooms	410.00	-	2,000.00	-

Greenwich has one of the lower proportions of people who receive Housing Benefit, 20% compared with the average of 24%. For most recipients it is partial benefit only; Greenwich has the lowest percentage receiving full benefit (4%).

Income distribution in Greenwich is very similar to that for the whole sample, with a very slight slant to the lower end of the spectrum.	Total	Greenwich	Gross household income per year
	%	%	
	3	3	Under £5,200
	10	10	£5,200 - £10,400
	16	16	£10,401 - £15,600
	15	16	£15,601 - £20,800
	14	17	£20,801 - £26,000
	15	15	£26,001 - £31,200
	9	7	£31,201 - £36,400
	6	6	£36,401 - £41,600
4	4	£41,601 - £46,800	
8	5	Over £46,800	

The pattern of receiving benefits and the nature of those benefits was very similar in Greenwich to the average figures but there tended to be fewer people claiming each one. For example, Housing Benefit is claimed by 19% compared with 24% for the whole sample and Council Tax Benefit 9% compared with 11%.

Property history

Greenwich is the only borough where more than half of those interviewed had previously lived in the same borough. Also the lowest level of people moving from elsewhere in London. Those moving from within London were most likely to have come from Lewisham, Southwark, Bexley or Newham.	Total	Greenwich	Location of previous home
	%	%	
	45	54	Same Borough
	31	24	Other London Borough
	11	5	Outside London but in South East
	6	5	Elsewhere in the UK
	7	12	Outside the UK

The pattern of previous tenures was very similar to the average with the majority (75%) moving from another privately rented property and most of the remainder moving out of their parent's/family home.

Future intentions

Some 13% thought it 'very' (8%) or 'fairly' (5%) likely that they would move in the next year and this was the lowest level in the study. More than half (61%) expected to remain in Greenwich but those who were considering another borough gave one mention for each of: Barnet, Bexley, Bromley, Croydon, Lewisham, Southwark and Sutton.

Tenure expectations for the future are noticeably different in Greenwich. There is the highest proportion expecting to remain in the PRS and the lowest who are looking to move into home ownership. This is perhaps a little surprising given that employment and income levels are fairly average in Greenwich. It may reflect the higher proportions of ethnic groups other than White, for whom home ownership may not be as clear an aspiration.	Total	Greenwich	Expected tenure of next home
	%	%	
	23	7	Buy own home
	5	7	Buy a shared ownership property
	41	55	Rent from Private landlord
	19	7	Rent from Council or HA
	1	0	Have accommodation provided by employer
	3	7	Move in with friends or family
	2	7	Some other arrangement
7	10	Don't know	

LAMBETH – a summary of results

In Lambeth 214 interviews were achieved, from locations well spread across the borough. The maximum statistical error for a sample of this size, at the 95% level, is +/-6.7%. This summary compares the results in Lambeth against the total sample of 1,165 so that Lambeth may be related to the overall situation within South East London and Lambeth, the study area. Weighted figures are used for the total sample to remove any bias due to uneven sample sizes across the six boroughs.

Profile

The sample in Lambeth was 56% male and 44% female and the age breakdown shows slightly more than average under 35 years old. Lambeth has the highest proportion of Other White residents (29% compared with 19% for the total sample) and relatively few from Black ethnic groups. The incidence of disability was the same as the overall sample and Lambeth had one of the highest levels of full time employment (62%).

Residence and tenancy

Lambeth has the lowest proportion of longer term residents (those who had been in the same property for five years or more) and above average numbers in residence for 1 – 2 years. This may fit with a 'newer' Other White community which is beginning to become established.	Total	Lambeth	Length of time in property
	%	%	
	29	29	Less than a year
	31	37	1-2 years
	26	26	2 – 5 years
	8	5	5 – 10 years
	4	2	More than 10 years

The pattern of tenancy agreements is little different from the average.	Total	Lambeth	Length of tenancy agreement
	%	%	
	4	5	Monthly ⁴
	17	18	Six months
	62	65	One year
	8	6	Longer than one year
	6	3	Do not have an agreement

Some 17% of properties were judged to be ex-Right to Buy, slightly above average.

Household composition

Lambeth has the highest percentage of couples across the study area, with or without children, and fewer family groups or other situations. Only 2% were students sharing with others, lower than all the other areas except Bromley.	Total	Lambeth	Household composition
	%	%	
	28	29	Single adult
	10	8	One adult with one or more children
	18	22	Two adults living as couple, no children
	30	34	Two adults living as couple, with child(ren)
	8	5	Other family group
	7	2	Other situation
	3	2	Adult(s) 65+ present

⁴These will be mainly Assured Shorthold Tenancies where the initial period has expired, and the tenancy has 'run on' on a monthly basis without a formal renewal

Houses in multiple occupation

Lambeth had one of the highest proportions of HMOs, 33% compared with the average of 25%. The number of households in each property was most likely to be two or three..

<p>There was slightly lower sharing of kitchens and bathrooms but the overall incidence of sharing facilities was similar to the average.</p> <p>37% of these HMO households use all of their available rooms as bedrooms, compared with 38% in total.</p>	Total	Lambeth	Facilities shared within HMO
	%	%	
	72	66	Kitchen/cooking facilities
	71	66	Bathroom/toilet
	50	56	Living room
	6	5	Bedrooms
	<1	2	Other
	16	18	No facilities shared

Opinions of the property and surrounding area

<p>In Lambeth both the quality and condition of accommodation were slightly less favourably rated as evidenced by there being fewer 'good' ratings and more 'fair'.</p>	Quality		Condition		Ratings
	Total	Lambeth	Total	Lambeth	
	%	%	%	%	
	15	15	14	13	Very good
	56	45	53	45	Good
	24	33	28	36	Fair
	4	6	4	6	Poor
1	1	1	<1	Very poor	

The identification of Category 1 hazards was similar to the sample as a whole with the exception of overcrowding. This was put at 11%, the highest level in any of the boroughs, compared with the average of 7%.

<p>In a similar pattern, the quality of the local environment was also viewed a little less favourably. The rating was the lowest across the study area except for Bromley.</p>	Total	Lambeth	Quality of local environment
	%	%	
	13	10	Very good
	53	46	Good
	27	36	Fair
	5	6	Poor
2	2	Very poor	

In contrast, anti-social behaviour was noted at the lowest level in Lambeth. Noise nuisance was the most likely complaint and confrontation between neighbours was a little higher than in other areas.

Property management

<p>Lambeth has an entirely typical balance between landlords and agents.</p>	Total	Lambeth	Who deals with accommodation?
	%	%	
	72	72	Directly with the landlord
27	27	Through a letting or estate agent	

Opinions of all three aspects of property management are relatively poor in Lambeth. This is largely due to the different balance between 'good' and 'fair' ratings but there is also more criticism of general attitude and helpfulness and response to repairs. For the latter, Lambeth has a lower rating than any of the other authorities.

			Very good	Good	Fair	Poor	Very poor
The way the property is managed and maintained	Total	%	13	53	28	4	1
	Lambeth	%	13	44	37	5	1
General attitude and helpfulness	Total	%	21	52	19	5	2
	Lambeth	%	16	48	25	9	3
Response to requests for repairs	Total	%	22	48	21	6	3
	Lambeth	%	17	40	28	10	3

Tenants in Lambeth were more likely than any other to have to make advance payments to secure their accommodation. The rates paid for all three types of advance were the highest found in the study area.	Total	Lambeth	Entry fees and advance payments
	£	£	
	285	346	Agents' fees
	974	1,141	Deposit
	971	1,099	Advance rent

Only an average proportion (12%) had contacted the Council about their property and, in common with other areas, little of the contact was directly related to condition or tenancy matters.

Rent, income and benefits.

Generally, rents in Lambeth are higher than the average for the study area. However, the figures for HMOs of 3 beds and more and the other properties with 4 or more beds are based on quite small numbers so should be viewed with some caution.

Average rents paid	HMOs		Non HMO	
	Total	Lambeth	Total	Lambeth
	£		£	
One bedroom	610.71	686.25	792.39	866.33
Two bedrooms	836.81	1,115.71	953.20	1,123.09
Three bedrooms	908.79	1,120	1,115.04	1,429.25
Four bedrooms	903.55	500	1,293.81	1,543.75
Five bedrooms	581.82	260	1,450	1,650
Six bedrooms	410.00	400	2,000	2,000

Lambeth has a slightly higher proportion of people who receive Housing Benefit, 28% compared with the average of 24%. In most cases (20%) this is partial and only 8% claim full benefit.

Lambeth has a greater proportion of people in the higher income bracket – 25% earn in excess of £36,400 per year. Overall, income levels tend to the higher end of the spectrum.	Total	Lambeth	Gross household income per year
	%	%	
	3	3	Under £5,200
	10	4	£5,200 - £10,400
	16	9	£10,401 - £15,600
	15	10	£15,601 - £20,800
	14	15	£20,801 - £26,000
	15	21	£26,001 - £31,200
	9	12	£31,201 - £36,400
	6	6	£36,401 - £41,600
4	5	£41,601 - £46,800	
8	14	Over £46,800	

The proportion of people receiving benefits was a little below average in Lambeth, which is probably partly explained by the relatively high number in full time employment.

Property history

The pattern of movement from the previous home is similar to that for the whole sample. One in three have come from elsewhere in London and this was most likely to be Southwark or Wandsworth, followed by Croydon, Tower Hamlets or Islington. Another thirteen boroughs were mentioned also, suggesting that Lambeth has a very wide catchment area.	Total	Lambeth	Location of previous home
	%	%	
	45	39	Same Borough
	31	34	Other London Borough
	11	14	Outside London but in South East
	6	6	Elsewhere in the UK
7	7	Outside the UK	

The pattern of previous tenures was very similar to the average with the majority (75%) moving from another privately rented property and most of the remainder moving out of their parent's/family home.

Future intentions

Some 28% thought it 'very' (19%) or 'fairly' (9%) likely that they would move in the next year. This is the highest figure within the study area. Some 32% expected to remain in Lambeth but those who were considering another borough mentioned: Southwark, Croydon and Islington followed by another seven boroughs each mentioned once.

Lambeth has one of the lowest proportions expecting to remain in the private rented sector with almost as many looking to move into home ownership. Given that income levels are relatively high in Lambeth, existing tenants may have better access to ownership than their counterparts in other boroughs. In contrast, Lambeth also has the highest percentage who expect their next move to be into the social rented sector.	Total	Lambeth	Expected tenure of next home
	%	%	
	23	27	Buy own home
	5	5	Buy a shared ownership property
	41	35	Rent from Private landlord
	19	27	Rent from Council or HA
	1	0	Have accommodation provided by employer
	3	2	Move in with friends or family
	2	2	Some other arrangement
	7	3	Don't know

LEWISHAM – a summary of results

In Lewisham 377 interviews were achieved, from locations well spread across the borough. The sample size was chosen to give a maximum statistical error at the 95% level of +/-5%. This summary compares the results in Lewisham against the total sample of 1,165 so that Lewisham may be related to the overall situation within South East London and Lambeth, the study area. Weighted figures are used for the total sample to remove any bias due to uneven sample sizes across the six boroughs.

Profile

The sample in Lewisham was 46% male and 54% female. Both the age and ethnic group breakdowns were close to the average for the study. So too were the incidence of disability and the employment levels recorded.

Residence and tenancy

Lewisham has both the highest proportion of newer residents (those who had been in their property for less than a year) and an above average number of longer term residents, those who had been in the same property for five years or more. This suggests a varied sample.	Total	Lewisham	Length of time in property
	%	%	
	29	35	Less than a year
	31	24	1-2 years
	26	26	2 – 5 years
	8	12	5 – 10 years
	4	3	More than 10 years

The pattern of tenancy agreement length almost exactly reflects that for the whole sample.	Total	Lewisham	Length of tenancy agreement
	%	%	
	4	4	Monthly ⁵
	17	17	Six months
	62	62	One year
	8	7	Longer than one year
	6	6	Do not have an agreement

The percentage of properties judged to be ex-Right to Buy was slightly below the average, 11% compared with 14%.

Household composition

Lewisham has slightly fewer households which include only one adult, with or without children and more households in other situations. Only 3% were students sharing with others, a little below average.	Total	Lewisham	Household composition
	%	%	
	28	24	Single adult
	10	9	One adult with one or more children
	18	18	Two adults living as couple, no children
	30	33	Two adults living as couple, with child(ren)
	8	6	Other family group
	7	11	Other situation
	3	2	Adult(s) 65+ present

Houses in multiple occupation

At 24% the proportion of HMOs in the Lewisham sample was very close to the average of 25%.

Lewisham has by far the greatest proportion of larger HMOs – 40% of them are home to at least four households. This compares with a figure of 27% for the whole sample.	Total	Lewisham	Number of households in HMO
	%	%	
	36	27	Two
	37	32	Three
	19	23	Four
	4	12	Five
	4	5	Six - ten

⁵These will be mainly Assured Shorthold Tenancies where the initial period has expired, and the tenancy has 'run on' on a monthly basis without a formal renewal

<p>The sharing of kitchen facilities is a little above average. As fewer people seem to share a living room, it may be the case that the larger HMOs are created by dispensing with this facility.</p> <p>39% of these HMO households use all of their available rooms as bedrooms, compared with 38% in total.</p>	Total	Lewisham	Facilities shared within HMO
	%	%	
	72	77	Kitchen/cooking facilities
	71	70	Bathroom/toilet
	50	41	Living room
	6	4	Bedrooms
	<1	1	Other
16	9	No facilities shared	

Opinions of the property and surrounding area

The quality and condition of accommodation in Lewisham were both rated very much as the total sample with just over half saying 'good' and around 70% saying 'good' or 'very good'. Similarly, the identification of Category 1 hazards was little different from the overall picture with damp and mould growth most likely, at 23% of households.

<p>The quality of the local environment also shows a rating similar to the whole sample, with the overall impression being 'good to 'fair'.</p>	Total	Lewisham	Quality of local environment
	%	%	
	13	11	Very good
	53	57	Good
	27	25	Fair
	5	5	Poor
2	1	Very poor	

Anti-social behaviour was noted at only an average level in Lewisham (14%). Noise nuisance was the most likely complaint followed by drunken behaviour.

Property management

<p>Lewisham has a slightly above average proportion of tenants who deal directly with a landlord rather than through an agent.</p>	Total	Lewisham	Who deals with accommodation?
	%	%	
	72	75	Directly with the landlord
27	24	Through a letting or estate agent	

<p>The views of tenants in Lewisham on all three aspects of property management differ very little from those of the sample as a whole.</p>							
			Very good	Good	Fair	Poor	Very poor
The way the property is managed and maintained	Total	%	13	53	28	4	1
	Lewisham	%	15	54	24	5	2
General attitude and helpfulness	Total	%	21	52	19	5	2
	Lewisham	%	21	56	19	3	1
Response to requests for repairs	Total	%	22	48	21	6	3
	Lewisham	%	18	50	22	5	2

<p>The tenants in Lewisham who did deal with agents were a little less likely to have to pay fees (23% compared with 27% overall). They were also less likely to pay rent in advance – 36% compared with 44%. The fees that were paid were little different from the overall amounts.</p>	Total	Lewisham	Entry fees and advance payments
	£	£	
	285	261	Agents' fees
	974	993	Deposit
971	981	Advance rent	

Only 11% had contacted the Council about their property but, as in other areas, only about 20% of that contact related directly to condition or tenancy issues.

Rent, income and benefits.

There is no clear pattern relating rents in Lewisham to those for the study area as a whole. For HMOs rents seem lower than average in the smaller properties (up to 3 beds) but a little higher in the larger ones. However, the sample sizes are very small for the five and six bed accommodation so they are difficult to judge. For the other properties rents are more similar and, again, based on small numbers for the four and five bed accommodation.

Average rents paid	HMOs		Non HMO	
	Total	Lewisham	Total	Lewisham
	£		£	
One bedroom	610.71	566.9	792.39	782.12
Two bedrooms	836.81	746.56	953.20	963.42
Three bedrooms	908.79	847.73	1,115.04	1227.42
Four bedrooms	903.55	959.31	1,293.81	1406.67
Five bedrooms	581.82	626	1,450.00	1250
Six bedrooms	410.00	412.5	2,000.00	-

Lewisham has one of the lower levels for receipt of Housing Benefit, 20% compared with the average of 24%. In common with other areas, it is more likely that this is partial benefit (14%) than full.

Income distribution in Lewisham is very close to that for the whole sample, differing by only small margins.	Total	Lewisham	Gross household income per year
	%	%	
	3	2	Under £5,200
	10	12	£5,200 - £10,400
	16	14	£10,401 - £15,600
	15	14	£15,601 - £20,800
	14	14	£20,801 - £26,000
	15	15	£26,001 - £31,200
	9	9	£31,201 - £36,400
	6	6	£36,401 - £41,600
4	4	£41,601 - £46,800	
8	9	Over £46,800	

Lewisham has one of the lower percentages of people receiving benefits, with 61% receiving none at all. Housing and Council Tax benefit are both 4% below the average but Child Benefit is close to it.

Property history

One in three current tenants have moved into Lewisham from another London borough. Their most likely origin is Southwark or Lambeth, followed by Tower Hamlets, Greenwich or Newham. A further 19 boroughs were each mentioned by a small number of people.	Total	Lewisham	Location of previous home
	%	%	
	45	46	Same Borough
	31	33	Other London Borough
	11	9	Outside London but in South East
	6	6	Elsewhere in the UK
7	6	Outside the UK	

The pattern of previous tenures was as it was in all areas with the majority (79%) moving from another privately rented property and most of the remainder moving out of their parent's/family home.

Future intentions

Some 20% thought it 'very' (13%) or 'fairly' (7%) likely that they would move in the next year. The majority of them (69%) expected to remain in Lewisham but those who were considering another borough mentioned: Greenwich, Havering, Lambeth, Merton, Newham, Southwark and Waltham Forest.

Lewisham's current private tenants were less optimistic than the average about moving into home ownership, or obtaining a social rented property, with the result that more of them expected to remain in the private sector on their next move.	Total	Lewisham	Expected tenure of next home
	%	%	
	23	16	Buy own home
	5	3	Buy a shared ownership property
	41	51	Rent from Private landlord
	19	16	Rent from Council or HA
	1	0	Have accommodation provided by employer
	3	3	Move in with friends or family
	2	4	Some other arrangement
	7	8	Don't know

SOUTHWARK – a summary of results

In Southwark 161 interviews were achieved, from locations well spread across the borough. As a relatively small sample the maximum statistical error at the 95% level is +/-7.7%. This summary compares the results in Southwark against the total sample of 1,165 so that Southwark may be related to the overall situation within South East London and Lambeth, the study area. Weighted figures are used for the total sample to remove any bias due to uneven sample sizes across the six boroughs.

Profile

The sample in Southwark was 46% male and 54% female. The age breakdown shows a higher proportion in the 35 – 49 age group than in any other area and below average numbers in the 25 – 34 and 50 – 64 age groups. Southwark had the highest proportion of Black African respondents (21% compared with 13% overall) and also relatively more from Other White groups and fewer from White British. Disability was at an average level and Southwark had one of the highest proportions of full time workers (62%).

Residence and tenancy

Southwark had slightly more people who had lived in their accommodation for 1 – 5 years and fewer who had been there less than a year perhaps indicating a slightly more settled group of private tenants.	Total	Southwark	Length of time in property
	%	%	
	29	24	Less than a year
	31	33	1-2 years
	26	29	2 – 5 years
	8	9	5 – 10 years
	4	4	More than 10 years

The pattern of tenancy agreements differed little from the average although Southwark does have the highest proportion without any tenancy agreement.	Total	Southwark	Length of tenancy agreement
	%	%	
	4	3	Monthly ⁶
	17	16	Six months
	62	60	One year
	8	9	Longer than one year
	6	9	Do not have an agreement

The proportion of properties judged to be ex-Right to Buy was well above average at 44% but Southwark had requested a focus on this type of property and the areas for interviewing had been chosen accordingly.

Household composition

A significantly higher proportion of single adult households were found in Southwark and fewer couples, with or without children. As a result of this, there were also fewer households with children in Southwark than in any other area.	Total	Southwark	Household composition
	%	%	
	28	38	Single adult
	10	9	One adult with one or more children
	18	11	Two adults living as couple, no children
	30	23	Two adults living as couple, with child(ren)
	8	8	Other family group
	7	13	Other situation
Southwark also has the highest proportion of students sharing with others, at 10% of the sample.	3	1	Adult(s) 65+ present

⁶These will be mainly Assured Shorthold Tenancies where the initial period has expired, and the tenancy has 'run on' on a monthly basis without a formal renewal

Houses in multiple occupation

Southwark had one of the higher proportions of HMOs at 33% of the sample. Most of those properties contained two, three or four households but there were a few larger ones also.

Facilities were shared with other households on an average basis and almost one in four did not share any facilities. 32% of these HMO households use all of their available rooms as bedrooms, compared with 38% in total.	Total	Southwark	Facilities shared within HMO
	%	%	
	72	73	Kitchen/cooking facilities
	71	75	Bathroom/toilet
	50	44	Living room
	6	6	Bedrooms
	<1	0	Other
	16	23	No facilities shared

Opinions of the property and surrounding area

The quality and condition of accommodation in Southwark were rated very slightly above average, mainly because there were fewer people giving 'poor' ratings and none saying 'very poor' to either. The identification of Category 1 hazards also tended to be very close to the average for the whole sample.

The quality of the local environment received one of the higher ratings in Southwark, again largely due to the low level of poor ratings.	Total	Southwark	Quality of local environment
	%	%	
	13	18	Very good
	53	50	Good
	27	28	Fair
	5	4	Poor
2	0	Very poor	

Anti-social behaviour was noted at only an average level in Southwark (14%). However, all the specific problems were each mentioned by more people, suggesting multiple issues in some areas. As in all the boroughs, noise nuisance was the most common complaint.

Property management

In Southwark there are slightly more people who deal with agents rather than directly with a landlord but the differences are small. There are also a few who deal with someone else.	Total	Southwark	Who deals with accommodation?
	%	%	
	72	66	Directly with the landlord
27	30	Through a letting or estate agent	

Opinions of all three aspects of property management are close to the average in Southwark. Although for general attitude and repairs there are more 'very good' scores, the balance between the other ratings does mean that the overall picture is very similar to that for the whole sample. However, as agents are rated less favourably than landlords generally and Southwark has a higher proportion of agents, less favourable ratings might have been expected. This suggests that property management standards may be genuinely higher in Southwark.

			Very good	Good	Fair	Poor	Very poor
The way the property is managed and maintained	Total	%	13	53	28	4	1
	Southwark	%	14	53	30	2	0
General attitude and helpfulness	Total	%	21	52	19	5	2
	Southwark	%	27	46	19	4	4
Response to requests for repairs	Total	%	22	48	21	6	3
	Southwark	%	30	42	19	4	4

Tenants in Southwark were as likely as anyone else to make advance payments to secure their accommodation, perhaps slightly fewer deposits and slightly more advance rents but the differences are small. The rates they paid were a little above average.	Total	Southwark	Entry fees and advance payments
	£	£	
	285	317	Agents' fees
	974	1,000	Deposit
	971	1,064	Advance rent

Some 14% had contacted the Council about their property, compared with an average of 12%. As in all other areas, little of this contact was actually related to tenancy or condition issues.

Rent, income and benefits.

There seems no clear pattern relating rents in Southwark to the rest of the study area. They seem significantly more expensive for one bed properties but very similar for a two bed. The four bed HMOs and three bed other properties are based on very small numbers so cannot be seen as reliable.

Average rents paid	HMOs		Non HMO	
	Total	Southwark	Total	Southwark
	£		£	
One bedroom	610.71	795	792.39	898.6
Two bedrooms	836.81	830.54	953.20	965.73
Three bedrooms	908.79	1137.78	1,115.04	875
Four bedrooms	903.55	1050	1,293.81	-
Five bedrooms	581.82	-	1,450.00	-
Six bedrooms	410.00	-	2,000.00	-

Southwark has the lowest proportion of people who receive Housing Benefit, 18% compared with the average of 24%. For two out of three of these people it is partial benefit rather than full.

Incomes in Southwark are tilted towards the lower end of the spectrum, with 44% earning less than £15,600 pa compared with 29% across the study area as a whole.	Total	Southwark	Gross household income per year
	%	%	
	3	5	Under £5,200
	10	14	£5,200 - £10,400
	16	25	£10,401 - £15,600
	15	21	£15,601 - £20,800
	14	8	£20,801 - £26,000
	15	8	£26,001 - £31,200
	9	8	£31,201 - £36,400
	6	4	£36,401 - £41,600
	4	3	£41,601 - £46,800
8	5	Over £46,800	

Southwark had one of the lower percentages of people receiving benefits; Housing Benefit and Council Tax Benefit in particular were well below average. This seems a little unexpected given the lower income levels in the area.

Property history

Southwark seems to attract higher proportions of residents from outside London and little more than one in three had previously lived within the borough. Where people have moved from elsewhere in London it is most likely to have been from Lambeth (15 of the 28%). Lewisham, Wandsworth and Hackney had all been the source of three or four moves and there were twelve other boroughs mentioned once or twice.	Total	Southwark	Location of previous home
	%	%	
	45	37	Same Borough
	31	28	Other London Borough
	11	16	Outside London but in South East
	6	11	Elsewhere in the UK
	7	8	Outside the UK

The pattern of previous tenures was very similar to the average with the majority (76%) moving from another privately rented property and most of the remainder moving out of their parent's/family home.

Future intentions

Some 26% thought it 'very' (18%) or 'fairly' (8%) likely that they would move in the next year. This was the highest proportion who thought themselves 'very likely' to move. Slightly fewer than half expected to remain in Southwark but those who were considering another borough mentioned: Lambeth, Lewisham, Islington and Kingston upon Thames.

The tenants in Southwark were more likely than any others to expect their next move to be into home ownership and only a third expected to remain a private tenant. This is the only area where more people expected to buy than to rent privately. Recalling that incomes amongst the Southwark sample tend to the lower end suggests that these people would probably find it more difficult to access home ownership than many others in the study.	Total	Southwark	Expected tenure of next home
	%	%	
	23	33	Buy own home
	5	5	Buy a shared ownership property
	41	31	Rent from Private landlord
	19	21	Rent from Council or HA
	1	2	Have accommodation provided by employer
	3	2	Move in with friends or family
	2	0	Some other arrangement
	7	7	Don't know