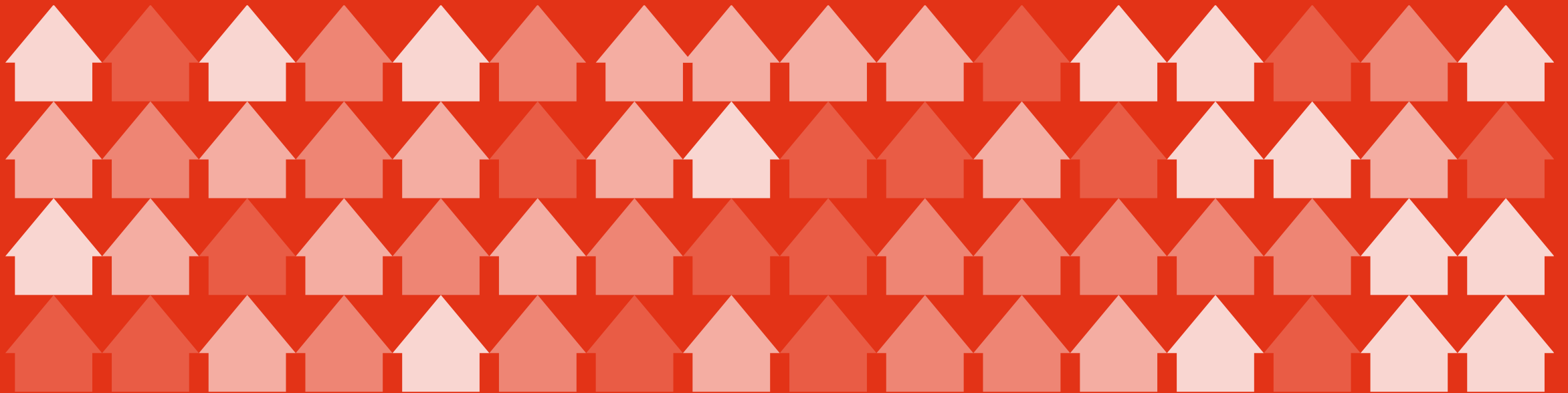


Good Landlord Research Study: Tenants

Report of findings
August 2023



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Background & objectives

To inform the development of a new Good Landlord Charter GMCA wanted to survey private tenants in Greater Manchester to understand their experiences of renting a property in the private rented sector (PRS).

The main objectives of the research are to:

- Identify the characteristics of private tenants in Greater Manchester (GM)
- Explore the motives and aspirations of tenants
- Understand experiences of renting properties
- Assess challenges in relation to affordability and cost of living in the private rented sector
- Explore how private renting can be improved

Methodology

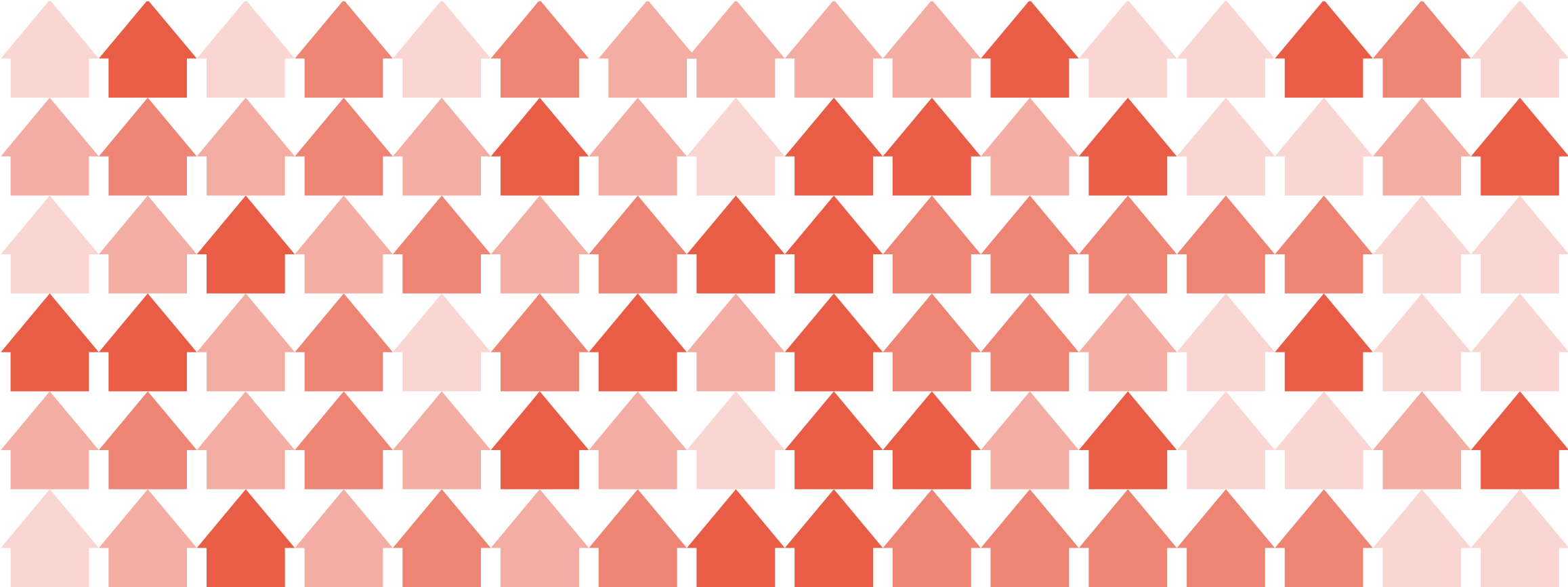
- **Survey** designed by DJS Research, in collaboration with GMCA, covering the topics listed on the following page.
 - **A mix of online and offline research methods** were used to ensure the **sample was inclusive and representative:** telephone interviews and online surveys (promoted via social media and using GMCA networks), plus online panels and face-to-face/in-street interviews among tenants.
 - **Fieldwork dates:**
 - Started on 15th Feb 2023
 - All fieldwork paused from 27th March until 5th May due to local elections.
 - Fieldwork then continued until 11th June.
 - In total a sample of 1,200 tenants was achieved.
 - **Tenants data has been weighted** to ensure it is representative of the GM private rented sector by age, gender and district.
-

Topics covered by the surveys

Tenants

- Tenant characteristics (inc. ethnicity, disability & sexual orientation)
- Tenancy length and details
- Satisfaction with property, landlord & private renting overall
- Looking for rental properties (e.g. ease of finding a rental property)
- Problems experienced
- Finances/rent
- What makes a good landlord

Summary



Summary (I)

Tenant Characteristics

The survey of 1200 private tenants within Greater Manchester (GM) was undertaken with a representative sample, which confirmed that private tenants in GM are generally young, diverse and transient. The survey also found that most tenants are not privately renting out of choice:

- Weighted by age, gender and district to reflect the latest population statistics* the survey data confirmed that half of private tenants in GM are aged 16-34 years. The proportion of respondents in the survey with a disability was higher than compared with the population data, at 1 in 4. Consistent with the population data, a similar proportion of survey respondents (1 in 4) are from minority ethnic groups.
- Most (4 in 5) tenants surveyed live in deprived communities (IMD 1 or 2) and the proportion that receive housing benefits (3 in 10) reflects the population. Conversely around 1 in 20 live in the least deprived communities of GM (IMD 5).
- Just 1 in 4 tenants from the survey said that renting is a positive choice for them. Two-thirds are 'forced' to live in the PRS due to not being able to own a home or access social housing.

- Three-quarters of tenants stated they have moved home at least once within the last 5 years and of those who haven't, half have looked to move. In total this means 9 in 10 tenants have either moved or looked to move in the last 5 years. These findings are consistent with the English Housing Survey** which found private renters were the most likely tenure to have been living in their home for less than 3 years.

Financial concerns

- **A third of tenants said they are struggling to pay their rent** and this proportion increases significantly among those not in work/unemployed, working part-time or claiming housing benefits; overall 1 in 5 cited their rent as a constant struggle.
- **Two-thirds of all tenants surveyed agreed that it has become more difficult to pay their rent in the last 12 months.**

*Census 2021 **<https://www.gov.uk/government/statistics/english-housing-survey-2021-to-2022-household-moves-fact-sheet/english-housing-survey-2021-to-2022-household-moves-fact-sheet>

Summary (II)

Finding properties

- **Significant proportions of tenants from the survey reported difficulties and discrimination when finding properties to rent:**
 - Half said they experienced difficulties when they last looked for rental properties and the likelihood of this increased among females, tenants with a disability, those not in work and bisexual.
 - Lack of availability, followed by poor property condition and then deposits being too expensive are the most common problems reported by tenants looking for properties in GM; at least half of all tenants surveyed had experienced each of these problems within the last 5 years.
 - 6 in 10 tenants claiming housing benefits reported they have experienced discrimination when looking for properties in the last 5 years because of this.
 - Significant minorities say they have experienced discrimination due to race, gender, sexual orientation or disability when looking for a rental property.
 - More than 1 in 3 tenants surveyed said they had concerns about the landlord or letting agent when looking for properties.

- **Rental cost stands out as the factor considered most important when looking for a rental property among tenants,** after some margin this is followed by property condition and the neighbourhood/feeling safe.

Value for money

- **More than half of tenants are satisfied that their rent represents value for money; however, 1 in 4 are dissatisfied in this regard.**
- Satisfaction with value for money declines as the amount of monthly rent paid increases and is lower than average among various groups of tenants, including those with a disability and tenants who are bisexual, gay or lesbian.

Summary (III)

Property maintenance and management

The majority of tenants are also satisfied with property management and condition, however significant minorities are not and certain sub-groups again stand out as being less satisfied.

- Three-fifths of tenants are satisfied with how their property is managed overall, however 1 in 4 tenants are dissatisfied and the proportion is significantly higher among tenants with a disability or who are bisexual.
- Tenants whose properties are managed directly by the landlord tend to be more satisfied with property management, than compared with tenants whose properties are managed by a letting agent or both the landlord and agent.
- Two-thirds are satisfied with their property's condition, while 1 in 5 are dissatisfied. Dissatisfaction is higher among tenants who receive housing benefits and who have a disability.

A high proportion of tenants have experienced maintenance issues recently and there seems to be some lack of knowledge as to who tenants should complain to when issues arise.

- Three-quarters of tenants have experienced a maintenance issue in their property within the last year, including 2 in 5 that have experienced damp/mould and nearly 1 in 3 a broken boiler/heating.
- When maintenance problems have been experienced, 2 in 5 tenants have been left dissatisfied with the outcome. The likelihood of this again increases significantly among certain groups, including those with a disability and tenants who are gay or lesbian.
- Over half of tenants reported that they have ever experienced a problem or disagreement with a landlord or letting agent; poor/slow communication is the most common complaint.
- Two-fifths of all tenants and half of those who have experienced disagreements with a landlord or letting agent stated that they do not know who to complain to if they needed to.

Summary (III)

Overall satisfaction

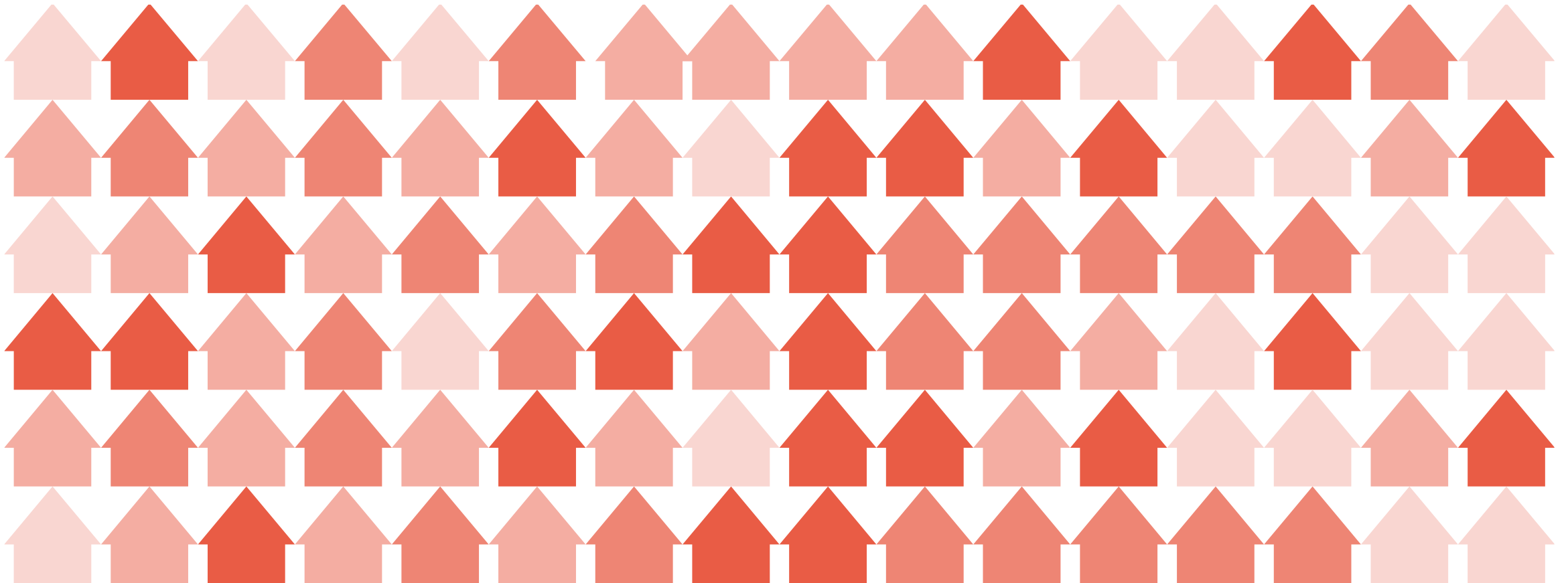
- **Overall, three-fifths of private tenants in GM are satisfied with living in the private rented sector, however just 1 in 5 are 'very satisfied'**. Satisfaction is higher when properties are managed solely by the landlord.
 - A quarter of tenants are dissatisfied with living in the private rented sector and this increases significantly among tenants with a disability and those who are bisexual, gay or lesbian.
 - **Affordability tops the reasons given for tenant dissatisfaction**, though many comments are coupled with poor living conditions and problems experienced with repairs, which confirms the need for a balance.
 - Key driver analysis found that **of a range of factors that drive tenant satisfaction, value for money of rent is the most significant**, closely followed by the relationship tenants have with their landlord.
 - Some tenants dissatisfied with living in the PRS comment that they feel scared and fear losing their home if they complain too much. Several tenants mention feeling trapped by living in rented accommodation.
 - CHAID analysis helps identify sub-groups to target when trying to improve tenant satisfaction. The analysis highlighted two groups where tenant satisfaction is particularly low:
 - Tenants who constantly struggle to pay their rent AND have a disability AND rent because they can't access social housing (7%).
 - Tenant who had experienced poor communication from their landlord/property manager AND broken electrics AND need for decoration (11%). In contrast, satisfaction is especially high among tenants who have experienced the opposite i.e. good communication AND no unexpected rent rises AND no damp/mould AND no damaged/broken white goods (87%).
-

Summary (V)

Landlord accreditation and enforcement

- The vast majority (8 in 10) of tenants say it would make at least some difference to their likelihood to rent a property if the landlord was accredited, for 2 in 5 it would make a 'big difference'.
- When looking for a new property landlord accreditation is considered very/quite important by 6 in 10 tenants and 8 in 10 consider the professionalism of the landlord and the reputation of the landlord/agent important.
- When asked to describe (in their own words) **what makes a good landlord, tenants prioritise good communication and quick repairs.** A landlord who looks after the property and is understanding of circumstances also feature highly.
- More than 8 in 10 tenants each think that stopping discrimination by landlords and improving property conditions should be legal requirements enforced by regulation and three-quarters think rent control should be enforced. Tenants are least likely to expect enforcement for giving tenants more power to stay in properties as long as they want or for allowing tenants more say over their homes (e.g. to decorate or have pets).
- When asked to select their top priorities for National Government and local councils to make or encourage landlords to do tenants are most likely to choose rent control, followed quite closely by improved property conditions/setting target times for repairs.

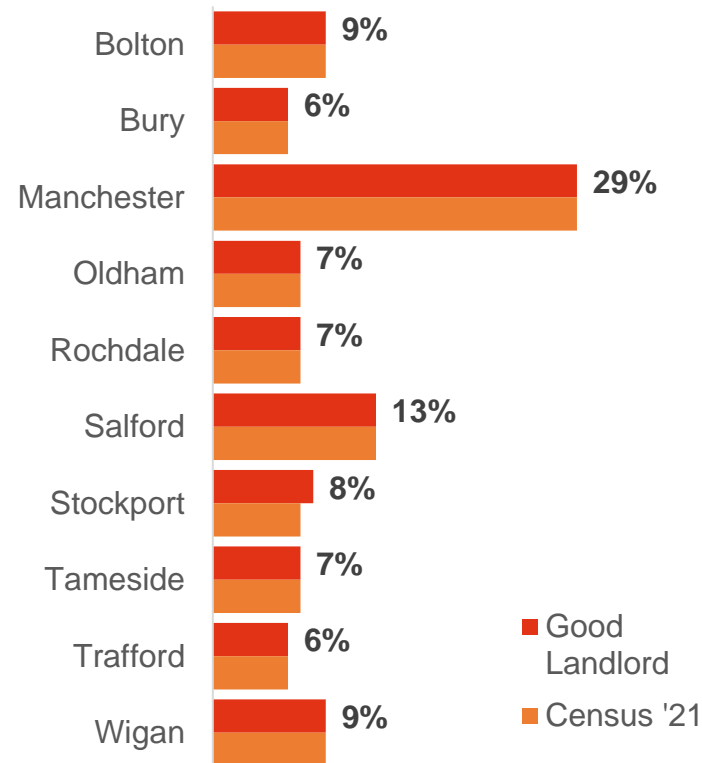
Tenant characteristics



Tenant profile (I)

The survey reached private tenants in all ten GM districts and was weighted to be representative of the population by district, age and gender. Half of tenants are under 35 years old and in line with the population around 1 in 4 are from minority ethnic groups and almost 4 in 5 are in employment or training. The proportion of tenants surveyed that have a disability is higher than in the population.

District



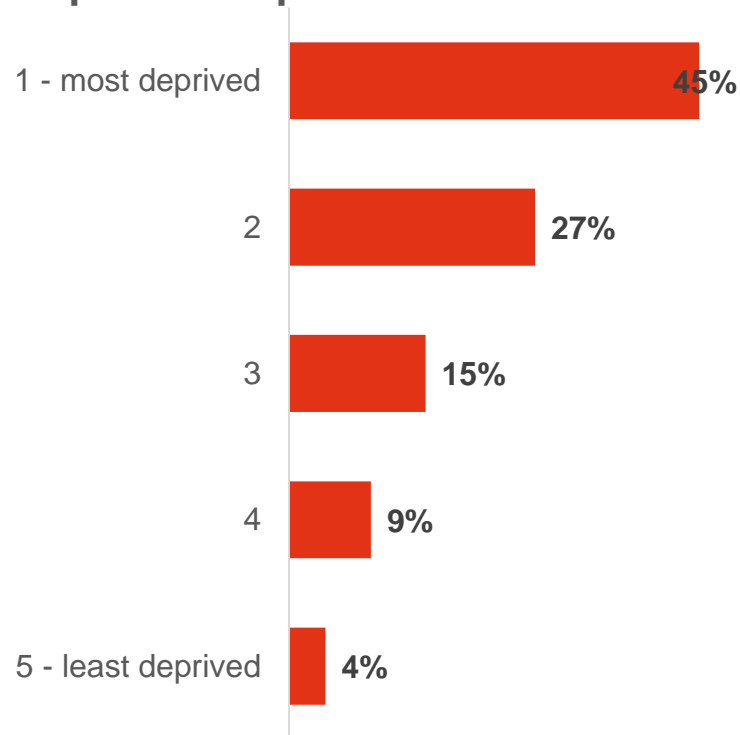
Gender	Survey	Census
Man	49%	51%
Woman	47%	49%
Non-binary	2%	
Trans/transgender	1%	
Age		
18-34	51%	51%
35-49	28%	29%
50+	20%	20%
Ethnicity		
Asian/Asian British	8%	13%
Black/Black British	5%	6%
Mixed	8%	3%
White	77%	74%

Disability	Survey	Census
Yes – have a disability	26%	18%
No – don't have a disability	72%	82%
Sexual orientation		
Bisexual	9%	3%
Gay or lesbian	8%	3%
Heterosexual or straight	78%	84%
Other sexual preference	1%	
Employment status		
In work or training	78%	80%
Not in work or training	21%	20%

Tenant profile (II)

Despite the majority of private tenants being in work, 8 in 10 live in the most deprived communities in GM (IMD 1 or 2). A minority (4%) live in the least deprived areas (IMD 5). In line with the population around 3 in 10 (29%) tenants stated they receive some form of housing benefits, though in most cases (80%) this only partially covers the rent.

Deprivation quintile*



Receive housing benefits, UC or allowance	Survey	Census
Yes	29%	40%
No	69%	

Among those receiving housing benefits, UC or allowance: fully covers rent: 19%, partially covers rent: 80%.

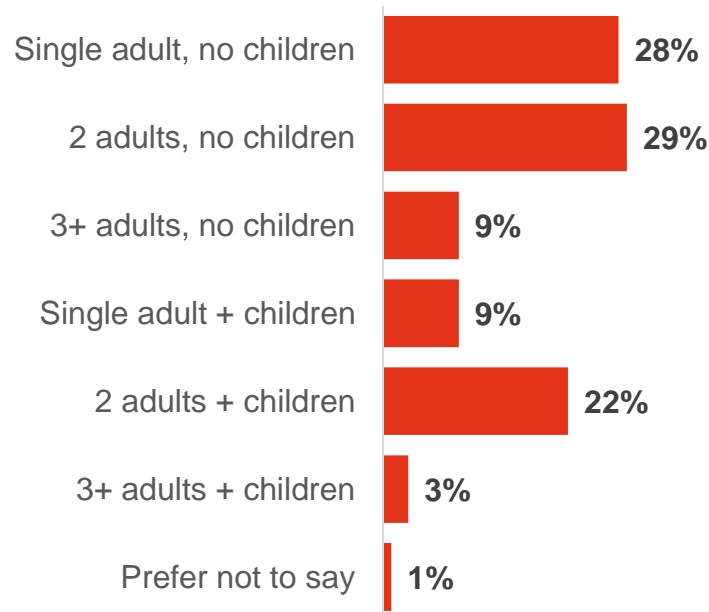
- **Significantly higher:** In Rochdale (52%) & Tameside (44%) IMD 1 (most deprived) (38%)
- **Significantly lower:** In Manchester (20%) & Trafford (18%)

*Based on Indices of Multiple Deprivation, using the tenants' postcode where one was provided (975) C011. Are you currently in receipt of housing benefit, the housing element of Universal Credit, or local housing allowance? (All tenants: 1200) C012. Does this fully or partially cover your rent? (Where in receipt of housing benefits (332).

Tenant profile (III)

Reflecting the GM tenant population, the majority (66%) of households have no children, while around 3 in 10 do have children and/or pets. 1 in 10 (11%) tenants are in house-shares. The highest proportion of tenants live in houses/bungalows, while a third live in flats, although property types vary significantly by district. Nearly half that live in a house/bungalow have a pet.

Household composition



11% of all tenants are sharing with other households

Of the categories 'Single adult, no children', '2 adults, no children' and '3+ adults, no children' **66% are adults only.**

With children: **33%** (29% referenced in Census that have dependent children)

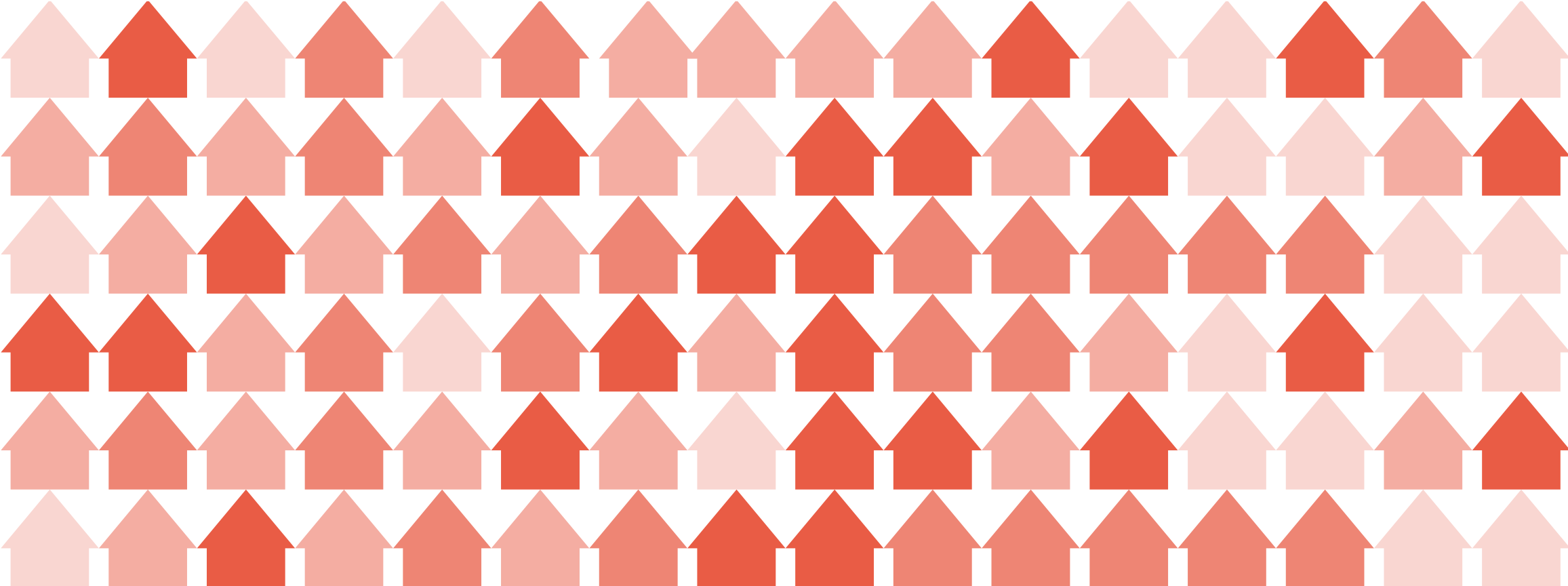
Property type	Survey	Census
House / bungalow	56%	57%
Flat/maisonette / studio	31%	43%
Room in a shared house / flat	10%	43%
Other	2%	43%
Pets in property		
Yes	34%	
No	65%	

- **Significantly higher:** In Oldham (78%), Stockport (71%), Tameside (80%) & Wigan (78%).
- **Significantly lower:** In Salford (46%) & Manchester (35%).

- **Significantly higher:** Live in house/bungalow (46%).
- **Significantly lower:** Live in flat/maisonette/studio (19%).

C03. Including yourself and anyone else who lives with you in the property which of the following best describes who lives in the property you currently rent? C05. What type of property do you live in? C08. Do you have any pets in the property you live in? (All tenants: 1200). C04. And is the property you currently rent shared with other households or rented entirely by you, your family unit or your household? (Where 2+ adults in household: 763).

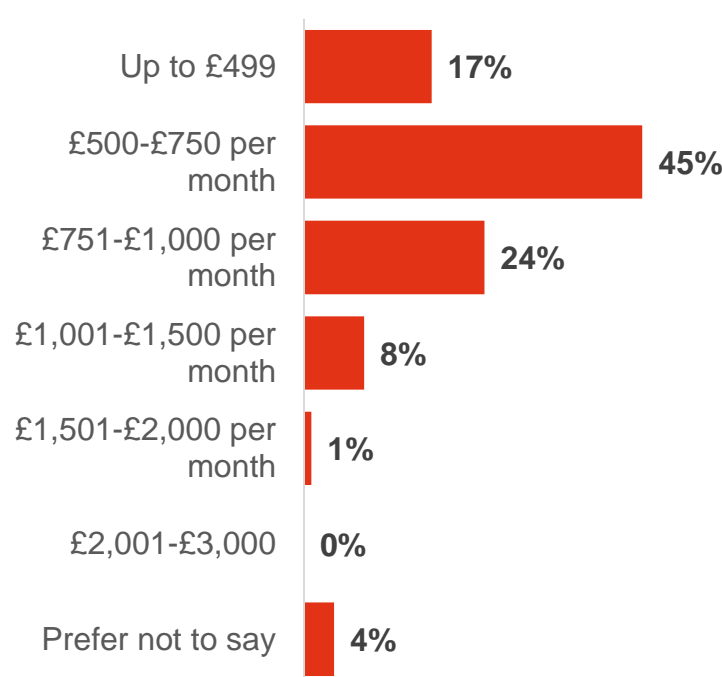
Tenant finances & rent



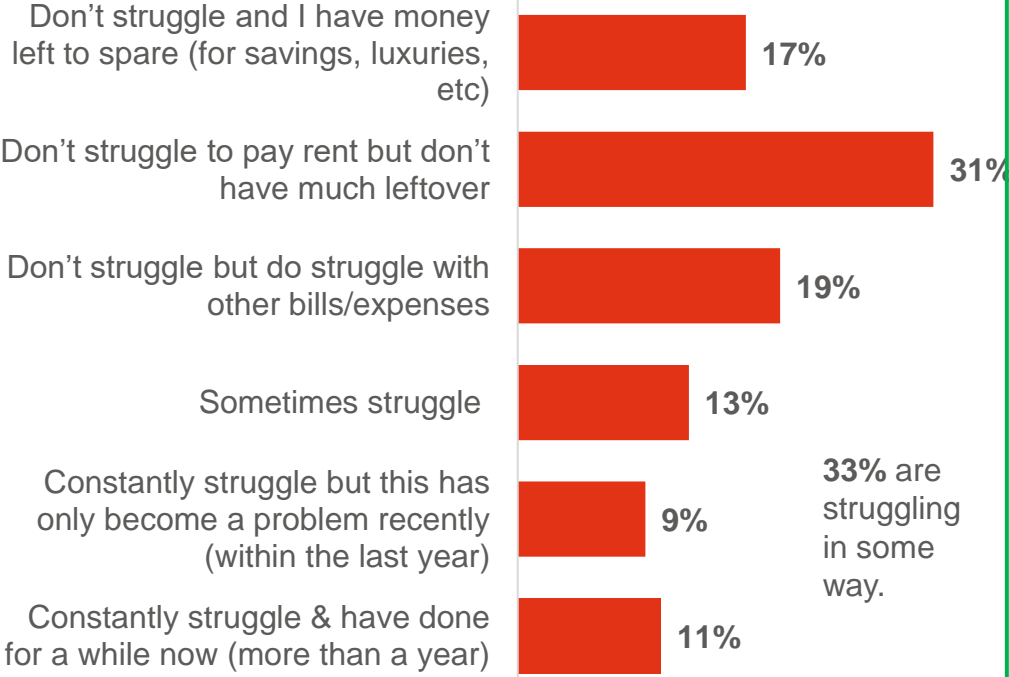
Rents and ability to pay (I)

Monthly rents are most likely to vary between £500-£750 per month. For 3 in 10 (33%) tenants paying their rent is a struggle, with 2 in 10 citing their rent as a constant struggle. Half (47%) of tenants that receive some form of housing benefits struggle to pay their rent.

Rent paid by household



Ease of paying rent



Particularly high among:

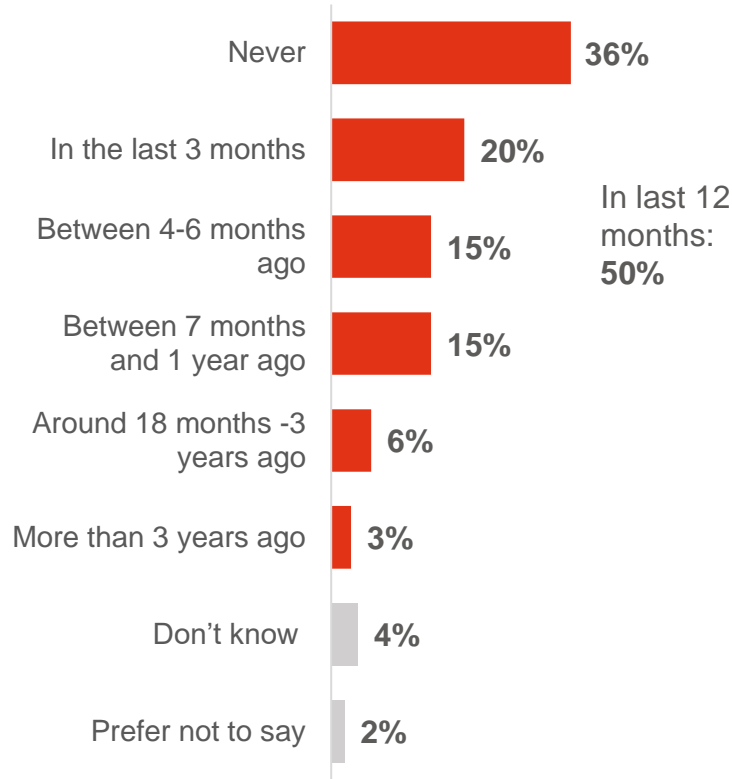
- Tenants in Oldham and Bury (44%)
- IMD 1 (most deprived) (39%)
- Single parents/guardians (43%) and households with children (42%)
- Not working/unemployed (48%) or work – part time (47%)
- Have a disability (44%) or permanently sick/disabled (61%)
- Have been in PRS for 3 months – 1 year (42%)
- Privately renting for employment reasons or they are a student (49%)
- Receive housing benefits/UC/allowance (47%)

C06. What is the total amount of rent you or your household (i.e. your family unit) pays per month for the property [Where house-share: or part of the property] you currently live in? (All tenants: 1200) Q25. Which of the following best describes how easy or difficult you find it to pay your rent? (All tenants who provided a response: 1,164).

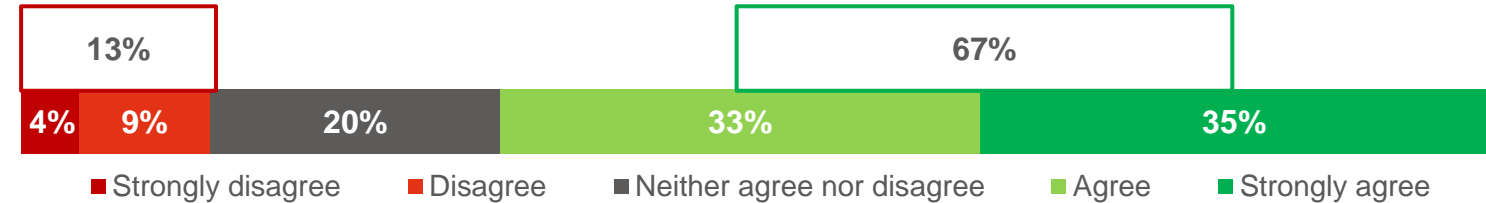
Rents and ability to pay (II)

In the last 12 months half of tenants have experienced a rent increase and nearly 7 in 10 agree that paying their rent has become more difficult in the last 12 months. Agreement increases with the amount of rent paid and to more than 8 in 10 among certain sub-groups of tenants, including those permanently sick or disabled.

When rent was last increased by landlord



Whether it has become more difficult to pay rent in the past 12 months



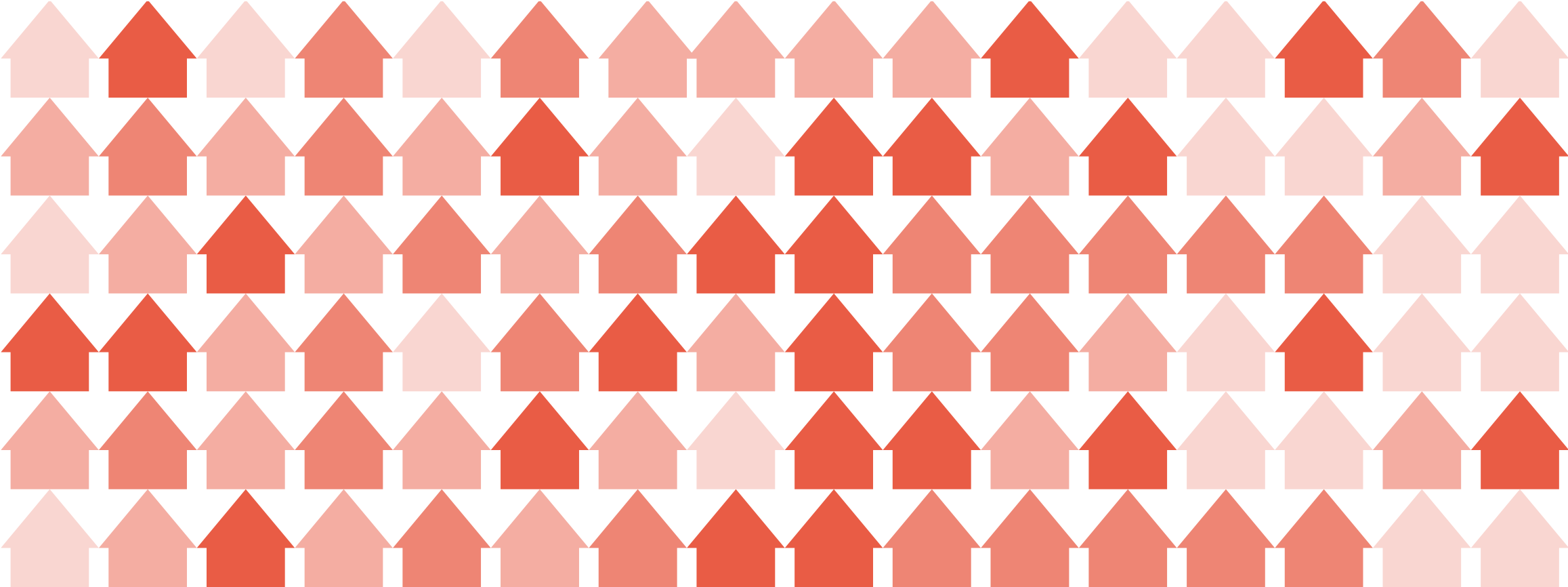
Agreement increases by the amount of rent paid: from 59% among those paying up to £500 per month, up to 74% among those paying £1,000+

- More likely to disagree:**
- Aged 50+ (20%) or 65+ (27%)
 - Privately renting is preferred choice/like the freedom (20%)
 - Not moved or looked to move in the last 5 years (26%)
 - Very satisfied with living in PRS (24%)
 - Tenants who don't struggle to pay rent and have money spare (47%)

- More likely to agree:**
- Live in Bolton (79%)
 - Aged 18-34 years (72%)
 - Have a disability (76%) or permanently sick/disabled (89%)
 - Gay or lesbian (81%)
 - Moved 4+ times in past 5 years (84%)
 - Dissatisfied with living in PRS (87%)
 - Receive housing benefits (74%)

Q27. When was your rent last increased by your landlord? (All tenants: 1200) Q26. To what extent would you agree or disagree that it has become more difficult financially to pay your rent in the past 12 months? (All tenants who provided a response: 1,180).

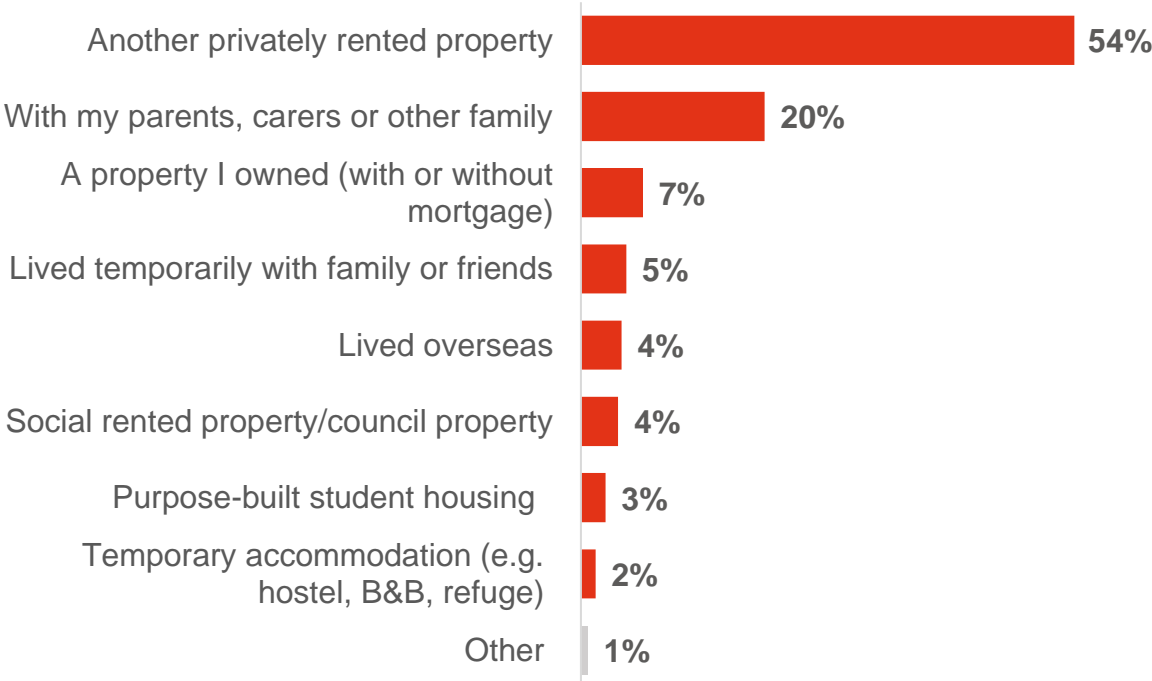
Tenant motivations & experience



Previous living arrangements

Half of tenants lived in private rented accommodation prior to their current home. There is an almost even split between those who have privately rented accommodation for 6+ years (46%) vs. those who have done so for a shorter period (54%).

Where they lived before current home



Length of time renting privately (in total)	
3 months to 1 year	14%
Between 13 months to 5 years	40%
6 – 10 years	22%
More than 10 years	24%
6+ years: 46%	

Particularly high among:

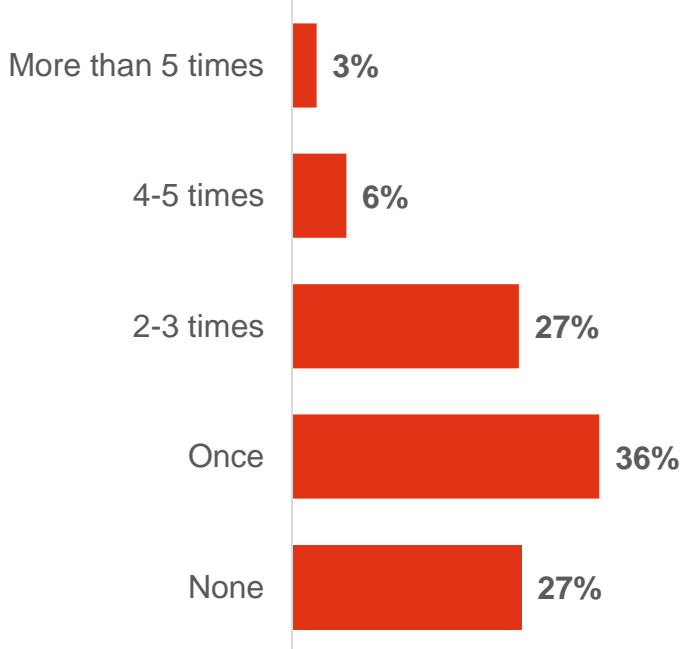
- Tenants in Stockport (62%) & Wigan (59%)
- Aged 50+ (72%) Those not in work or training (54%)
- Those living in a house/bungalow (53%)

Q02. Which of the following best describes where you were living before you moved to your current home? S03. How long have you been renting privately (i.e. from a private landlord, a letting agent, relative or friend, rather than the council or a housing association)? This includes all accommodation you have ever privately rented, not just the property you currently live in. (All tenants: 1,200).

Whether moved or looked to move in last 5 years

Findings indicate that private tenants are quite a transient audience: The majority (73%) have moved home at least once in the last 5 years, 1 in 10 have moved 4+ times. Of those who have been in their current home more than 5 years, half have looked to move to other private rented accommodation in the last 5 years. In total this means 87% of tenants have either moved or looked to move in the last 5 years.

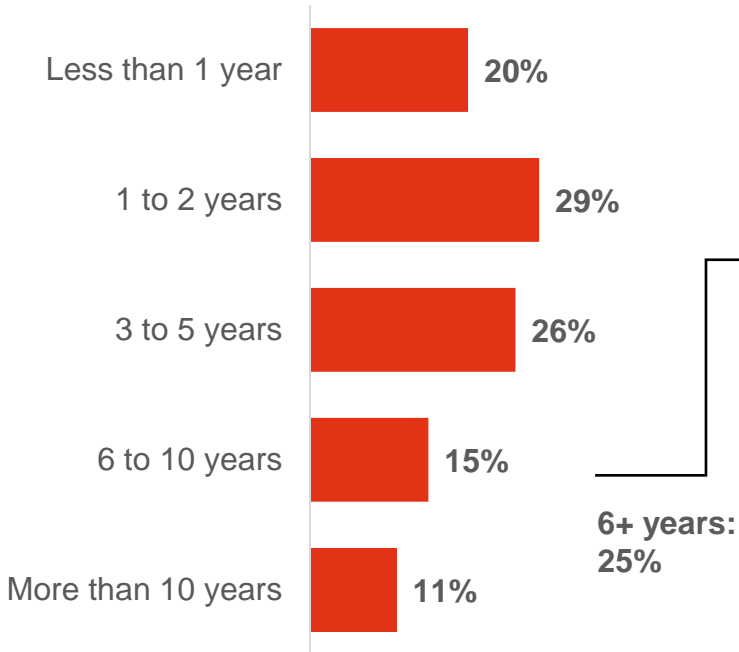
Number of times moved in last 5 years



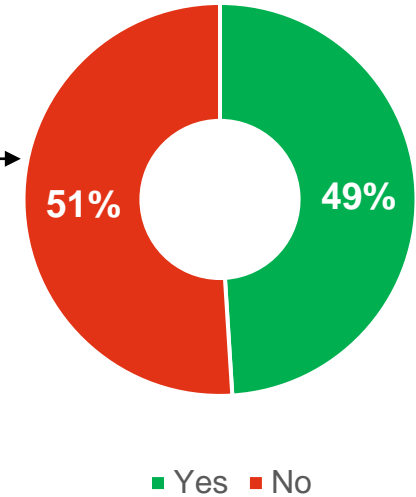
4+ times (9% on average) higher among:

- 18-24 year olds (19%)
- Not working/unemployed (21%)
- Have a disability (17%)
- Bisexual (22%)

Time in current property



Looked for alternative home to privately rent in the last 5 years

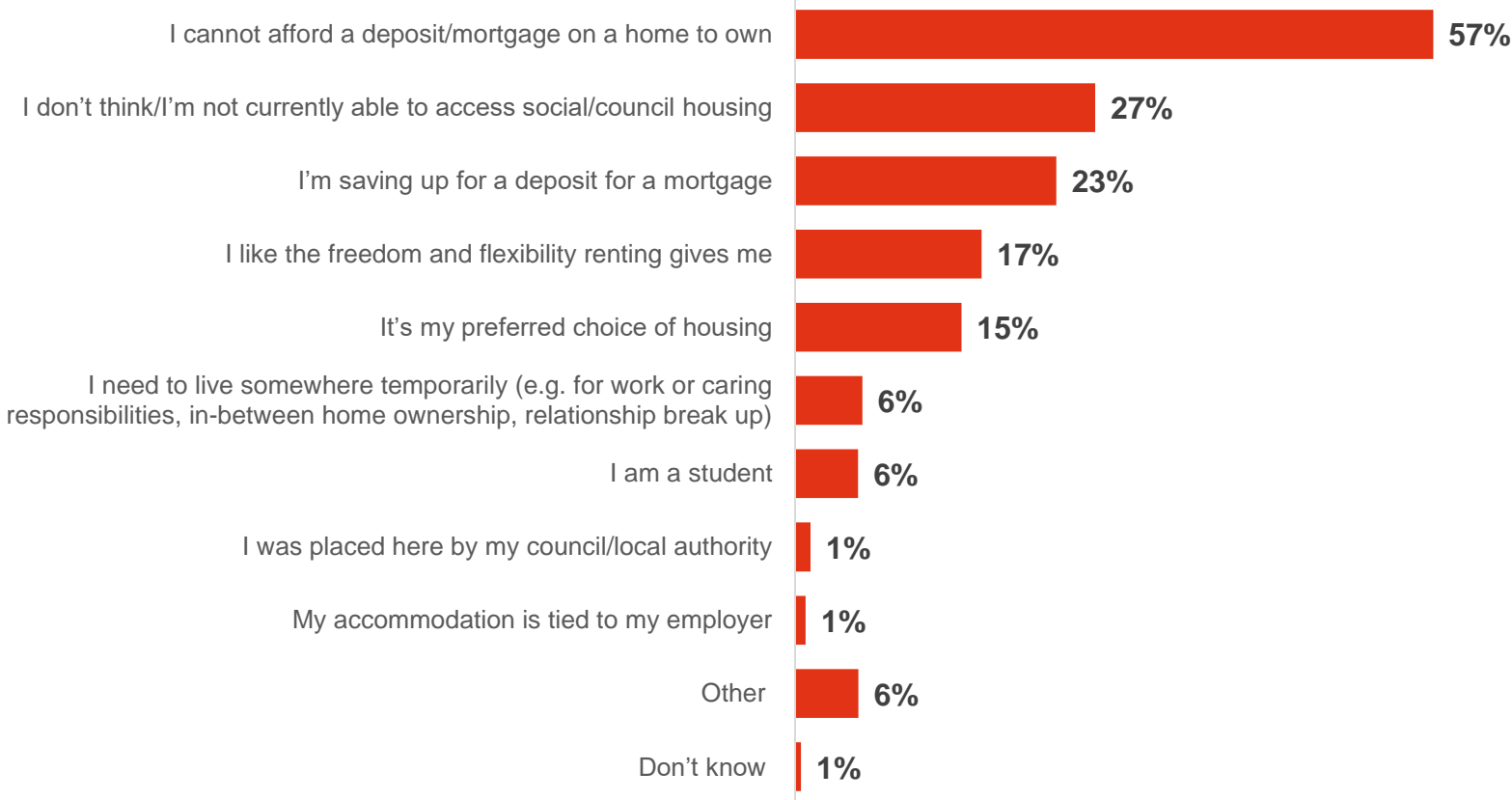


6+ years: 25%

Q03. How many times have you moved home in the past 5 years? (All tenants who provided a response: 1198). Q04. How long have you lived in your current property? (All tenants who provided a response: 1199) Q04b. Have you tried to look for a new or alternative home to rent from a private landlord/letting agent within the last 5 years? (All tenants who have been in their home 6+ years: 278).

Main reasons for privately renting

The majority of tenants are not renting through choice. Nearly 7 in 10 tenants are ‘forced’ to rent privately, as they say they cannot afford to own a property or cannot access social housing. Those renting privately out of choice tend to be older and live in more affluent areas



Forced category total: 67% and are particularly high among:

- Those living in Bury (81%); Single parents/guardians (82%)
- Have a disability (79%);
- Bisexual (81%)
- Those receiving housing benefits (75%)

Choice/freedom categories total: 26% and are particularly high among:

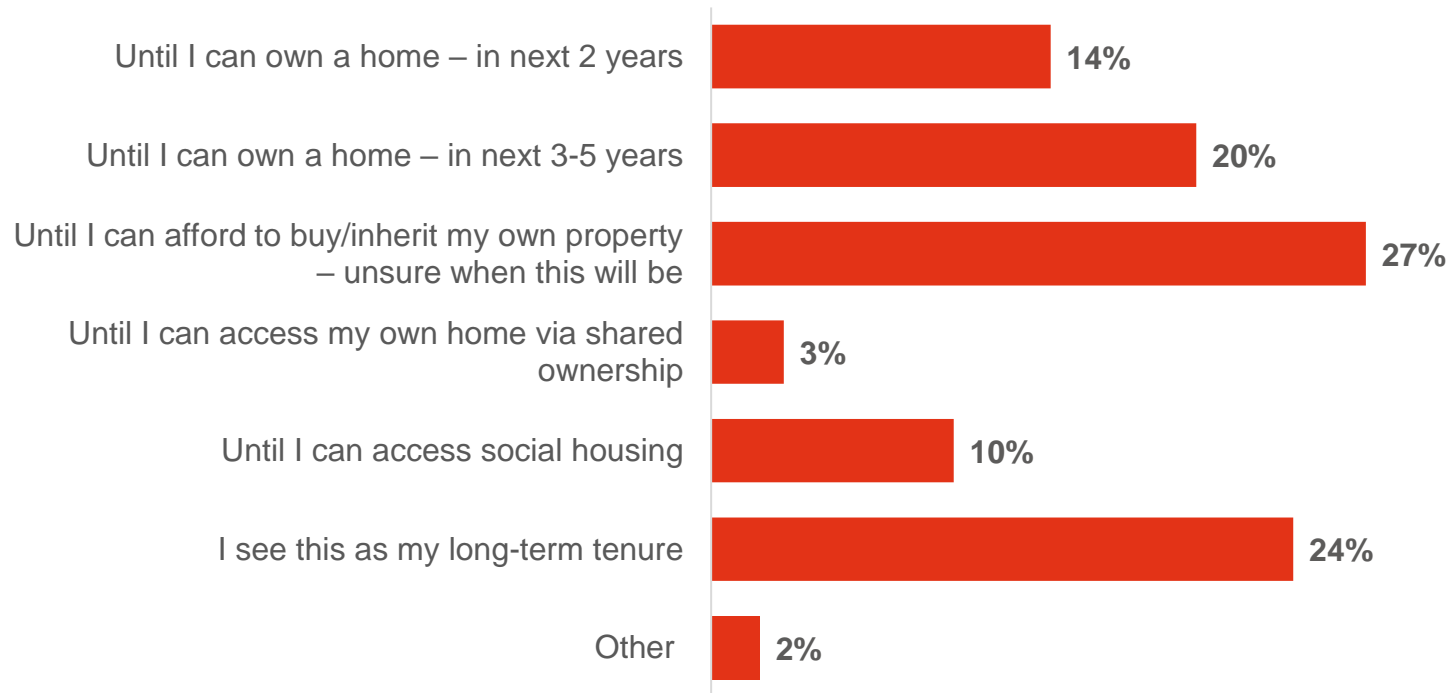
- Least deprived (IMD 5) (51%)*;
- Aged 65+ (47%)*

Q01. Which of the following best describe your main reasons for privately renting your current home? (Multi-response) (All tenants: 1,200).
 *Low base (under 50).

Future expectations

When asked how long tenants expect to live in the PRS, 1 in 4 see this as their long-term tenure, while the majority do not. Around 3 in 10 (34%) expect to be able to own a home within the next 5 years. A further 3 in 10 (27%) are renting until they can afford to own but are not sure how long this is will take.

Length of time tenants expect to privately rent



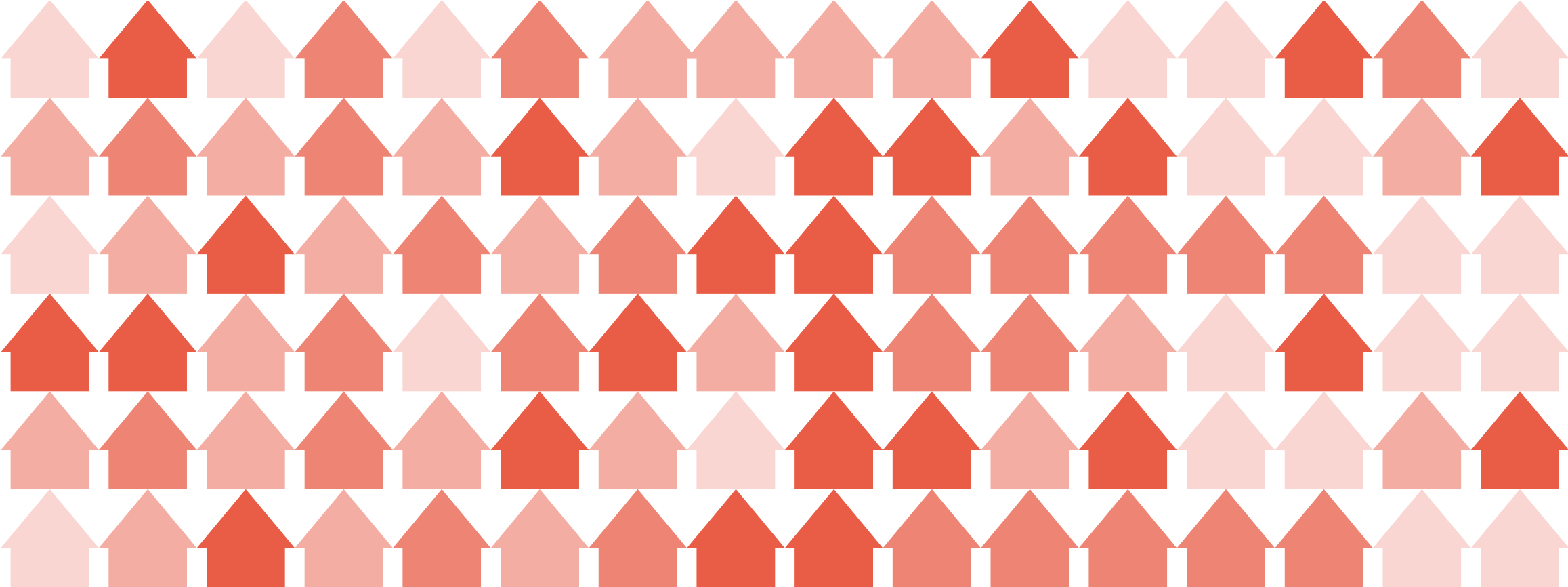
Within the ‘Until I can access social housing’ category it’s particularly high among:

- Those who receive housing benefit (22%)
- Those who constantly struggle to pay rent (27%)
- Have a disability (17%)

Within the ‘I see this as my long-term tenure’ category it’s particularly high among:

- Tenants in Tameside (37%) and Rochdale (36%)
- Aged 50+ years (56%)
- Have a disability (35%)
- Longer-term private renters (10+ years 42%)
- Those who receive housing benefits (36%)

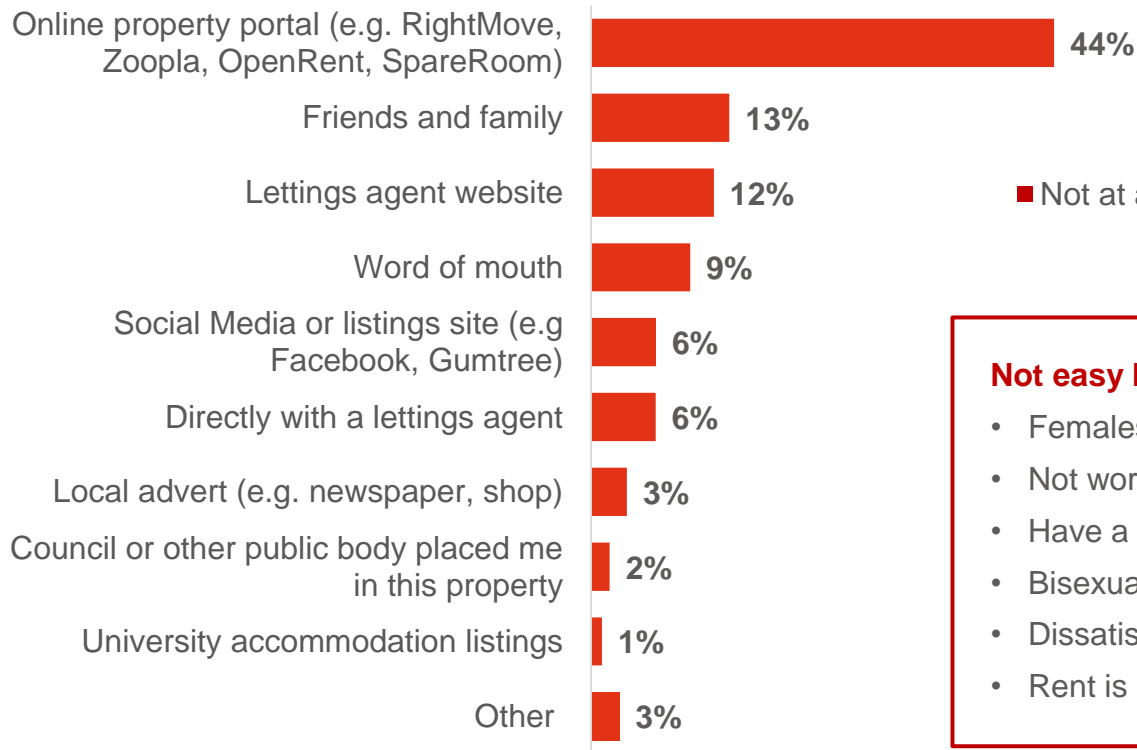
Looking for rental properties



Finding rental properties

The highest proportion of tenants found their current rental property online. However, just over half (52%) say finding a property was not easy and this proportion increases significantly among certain groups of tenants, including those with a disability, those not working and tenants who are bisexual.

How tenants first found out about current property



Ease of finding somewhere to rent



Not easy higher among:

- Females (57% vs 45% males)
- Not working/unemployed (64%)
- Have a disability (64%)
- Bisexual (64%)
- Dissatisfied with living in PRS (78%)
- Rent is £751-£1,000 per month (64%)

The top reasons for finding this difficult:

1. High Competition/Demand for properties (30%)
2. Increase in rent costs (21%)
3. Nothing in price range (17%)
4. Not enough affordable housing (9%)
5. Not enough properties (8%)
6. Fees are too high (e.g. deposit, admin) (8%)
7. Due to being on benefits/universal credit (8%)

Q08. Where did you first see the advertisement for the property you live in or how did you find out it was available for rent? (All tenants: 1,200) Q09. When you last looked for a property, how easy was it to find somewhere to rent? (All tenants who provided a response: 1,184) Q10. What was the main reason for finding this process difficult?

Problems when looking for properties

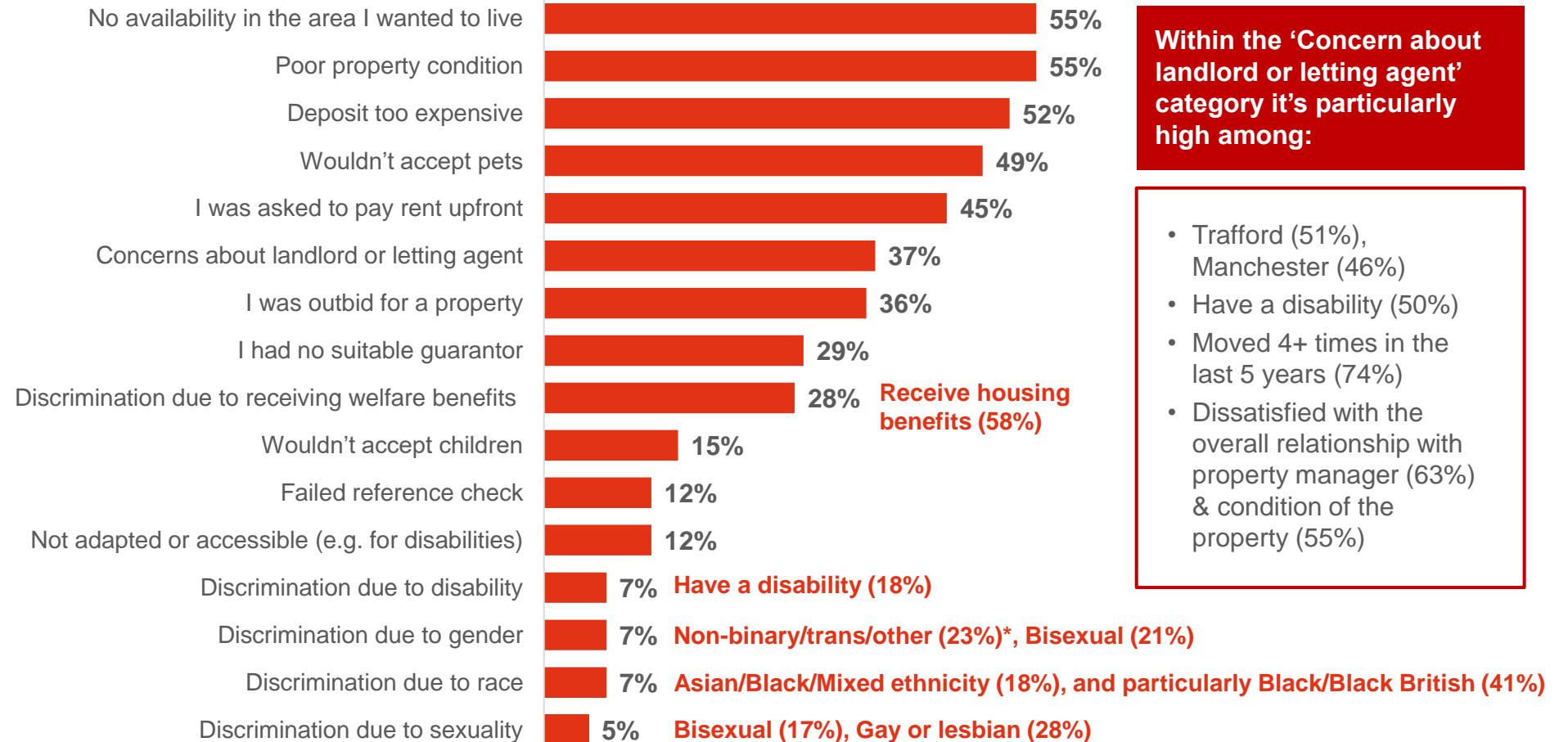
Lack of availability and poor condition are the most common problems experienced when looking for rental properties.

More than a third have experienced concerns about the landlord or letting agent.

6 in 10 tenants in receipt of housing benefits say they have experienced discrimination due to this.

Significant minorities have experienced discrimination due to disability, race, gender or sexual orientation.

Problems experienced when looking for a home to rent within the last 5 years (% Yes)



Within the 'Concern about landlord or letting agent' category it's particularly high among:

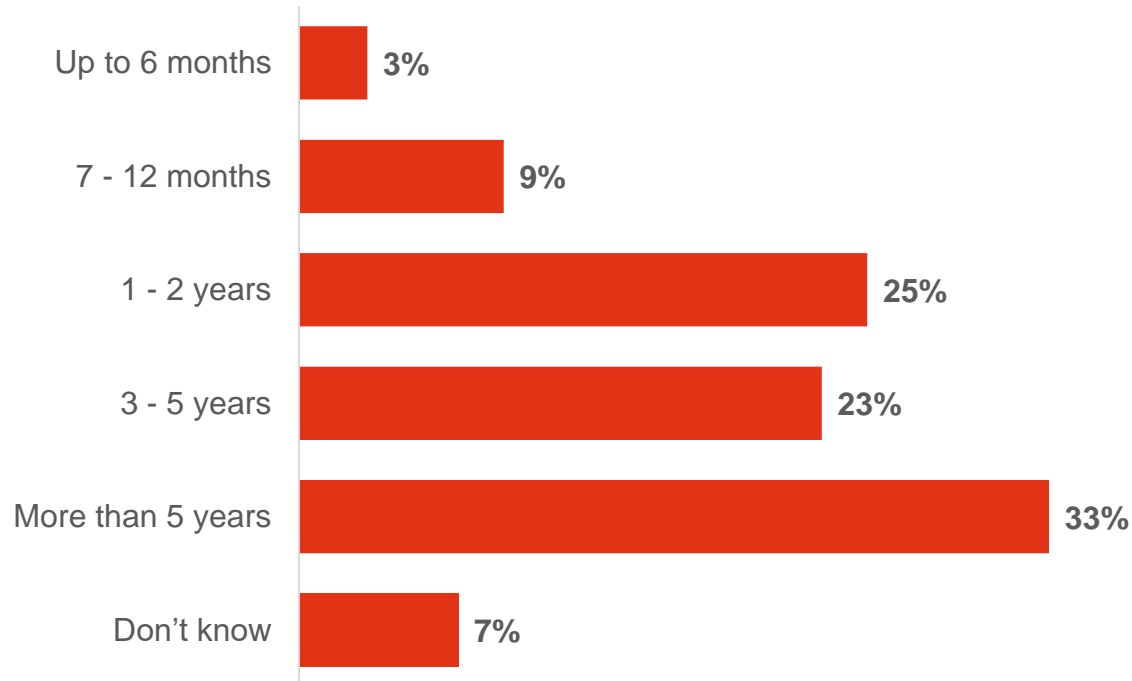
- Trafford (51%), Manchester (46%)
- Have a disability (50%)
- Moved 4+ times in the last 5 years (74%)
- Dissatisfied with the overall relationship with property manager (63%) & condition of the property (55%)

Q13. Have you experienced any of the following problems when looking for a home to rent from a private landlord/letting agent within the last 5 years? (All tenants who provided a response. Bases vary) *Low base (under 50).

Length of tenancy needed

When looking for properties 3 in 5 (60%) tenants hope to be in the property for 5 years or less. A third (33%) plan on longer tenancies. However, preferences vary by a range of factors, including district and age.

Length of time tenants would like to be in the property for



Within the categories of up to 12 months (totalling 12%) it's particularly high among:

- Manchester (18%)
- Aged 18-24 (27%)
- Tenants who live in a room in a shared house/flat (26%)
- Students/those in training (47%)
- Been in PRS for 3 months to 1 year (29%)
- Have moved 4+ times in the last 5 years (23%)

Within the category of more than 5 years it's particularly high among:

- Tameside (52%), Stockport (47%) and Wigan (43%)
- Aged 35-64 (46%) and 65+ (67%)
- Single parent/guardian (47%) and families with children (41%)
- Have a disability (45%)
- Been in PRS for longer (10+ years, 58%)
- Not moved and have not looked to move in the past 5 years (70%)
- Receive housing benefits (48%)

Q15. When looking for a home to rent, how long would you ideally like to be in the property for? (All tenants: 1,200).

Most important factors when looking to rent

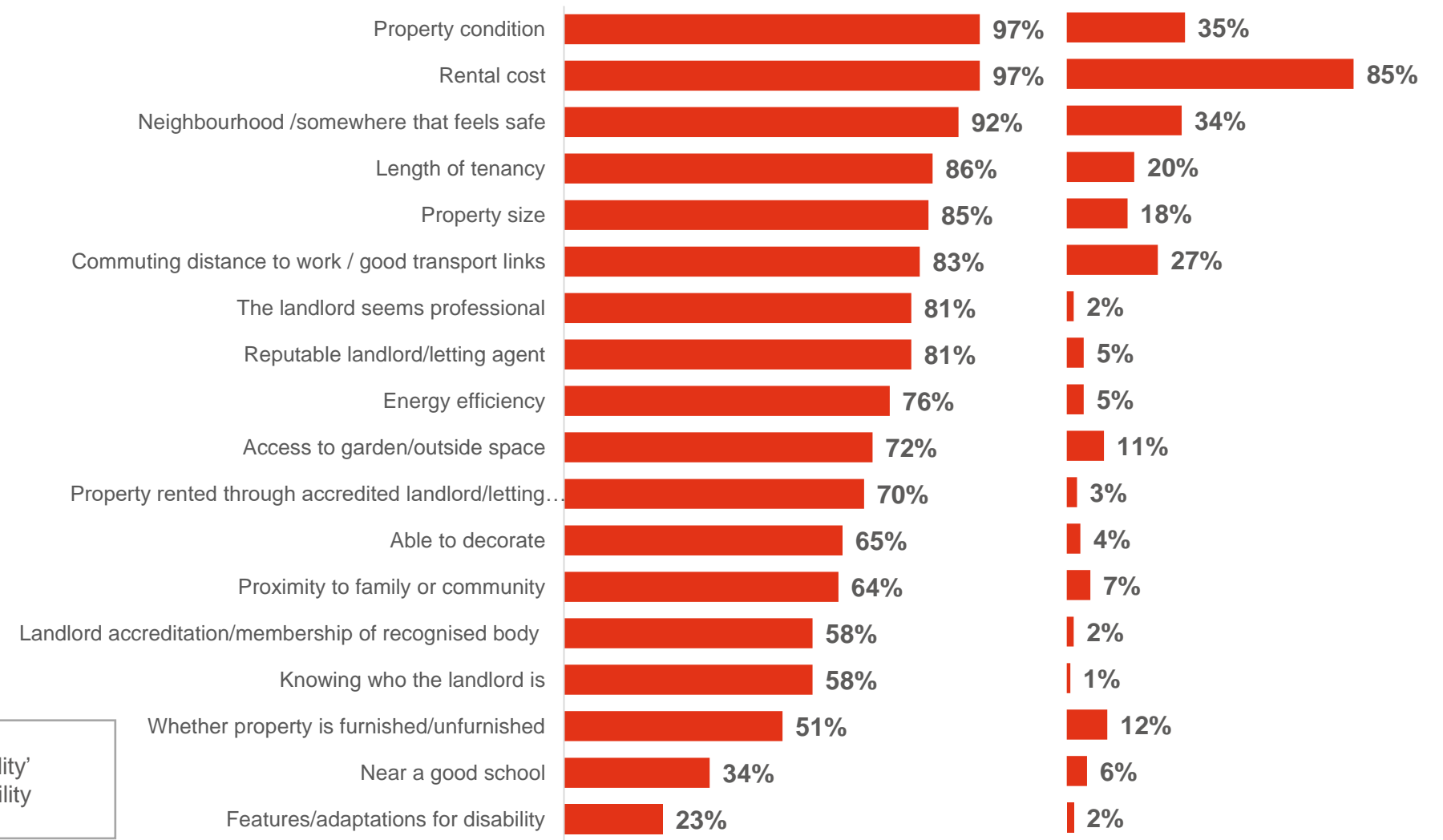
Property condition and rental cost are most likely to be considered very/ quite important when looking for a property. However, when asked to select their top 3 priorities, 85% of tenants choose rental cost.

Property condition (35%) and neighbourhood/safety (34%) are the factors considered next most important.

Landlord accreditation is considered very/quite important by 6 in 10 tenants, while 8 in 10 consider the professionalism of the landlord and the reputation of the landlord/agent as important.

Within the 'Features/adaptations for disability' category is **33%** among those with a disability

Important factors when looking for a home to rent (% Very/quite important)

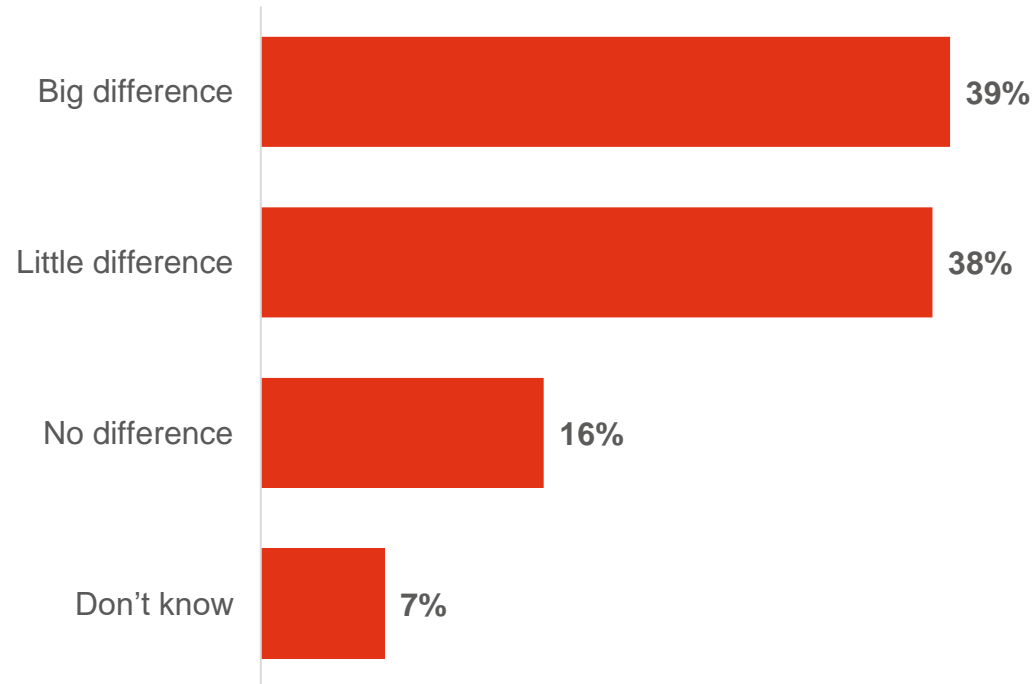


Q11. How important are the following factors to you when looking for a home to rent? (All tenants: 1,200) Q12. And which factors would you say are most important to you? (top 3) (All tenants who chose more than 3 options as being very/fairly important: 1,198).

Impact of accreditation on likelihood to rent

Around 4 in 5 (78%) say it would make a big or little difference to their likelihood to rent if the landlord was accredited.

Difference it would make to likelihood to rent if landlord were accredited



Within the category 'Big difference' it's particularly high among:

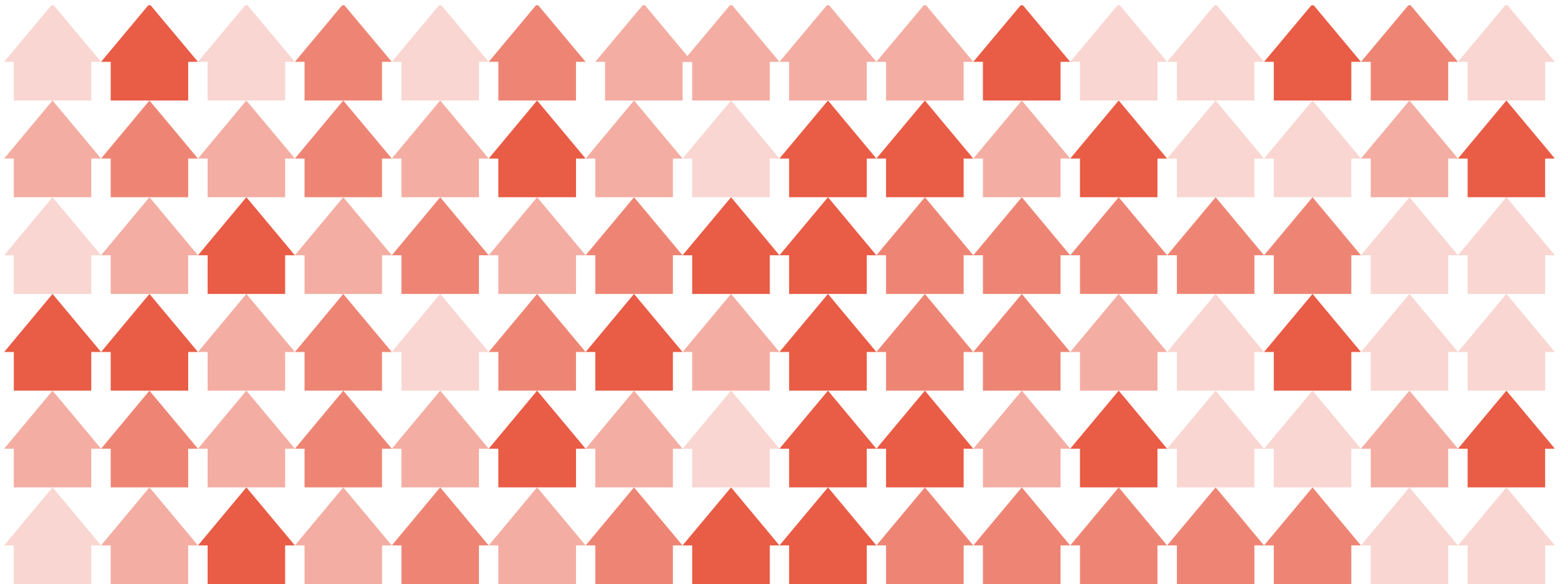
- Manchester (45%)
- Aged 50+ (48%)
- Dissatisfied with their overall relationship with property manager (48%)
- Dissatisfied with living in the PRS (51%)

Within the category 'No difference' it's particularly high among:

- Oldham (29%) and Rochdale (26%)
- Least deprived (IMD 5)* (36%)
- Not working or unemployed (31%)
- See PRS as their long-term tenure (29%)
- Receive housing benefits which fully covers their rent (29%)
- Tenants who have had no property problems or maintenance issues in the past year (23%)
- Satisfied with living in the PRS (21%)

Q14. How much of a difference would it make to your likelihood to rent from a landlord if they were accredited (i.e. they have undertaken appropriate training and signed up to a code of conduct)? (All tenants: 1,200) *Low base (under 50).

Property management



Property manager

Around 6 in 10 tenants say their property is managed directly by a private landlord, for 3 in 10 it is managed by a letting agent and for just over 1 in 10 a combination of both. Management by private landlords directly declines as monthly rents increase.

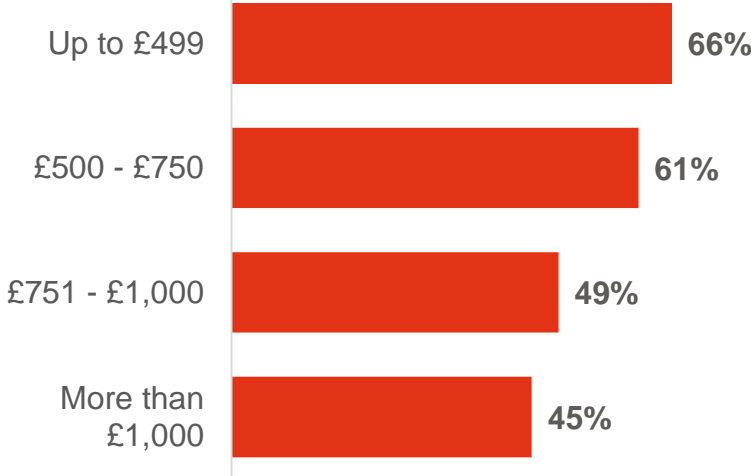
Who manages property



Within the categories of Private landlords (totalling 58%) it's particularly high among:

- Asian/ Black/ Mixed ethnicity (65%)
- Have a pet (63%)

Management by private landlord directly, by monthly rents

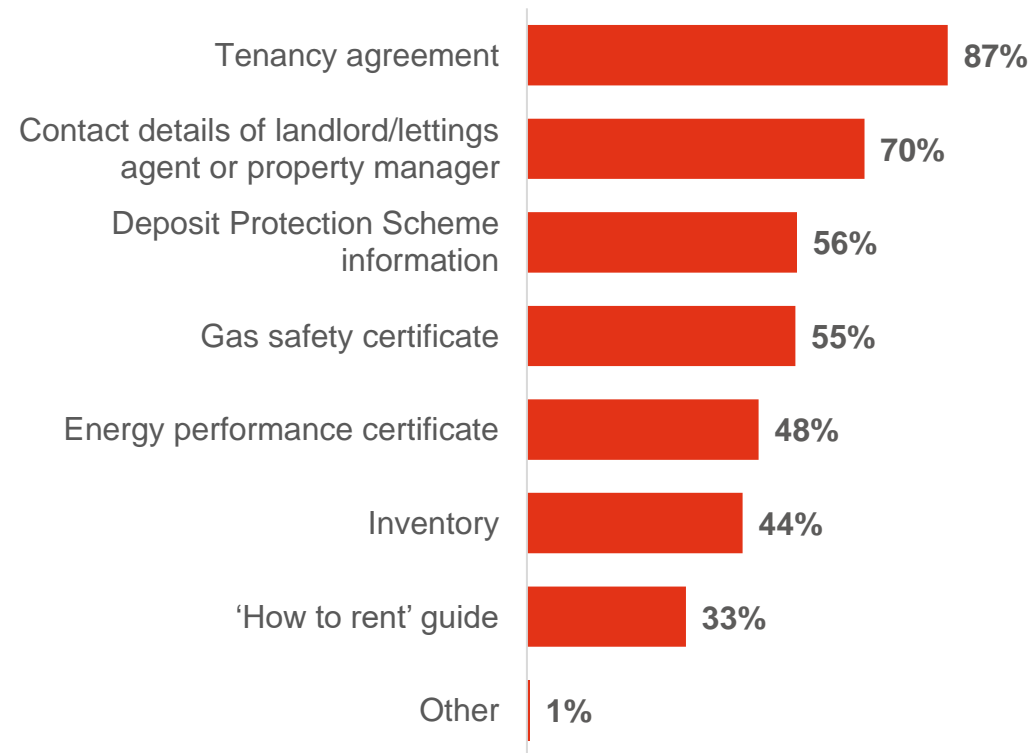


Q5. Who manages your current property? (All tenants: 1,200).

Tenancy arrangements

Most tenants received a tenancy agreement and paid a deposit, while fewer than half received an EPC or inventory and even fewer a 'How to rent' guide.

Paperwork received at the start of the tenancy

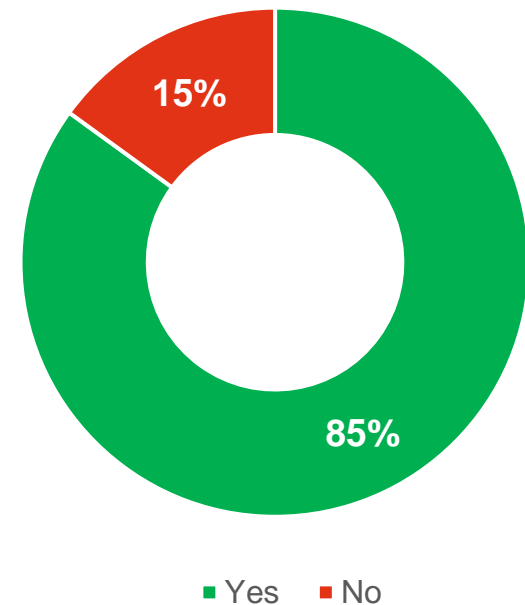


Lower among:

Compared with average, tenants of **Asian/ Black/ Mixed** ethnicity are less likely to have received a tenancy agreement (80%), Deposit Protection Scheme Information (48%) or Gas Safety Certificate (47%).

Tenants who receive housing benefits are less likely to have receive an inventory (35%), EPC (39%) and Deposit Protection Scheme Information (49%).

Whether a deposit was paid to rent the current property

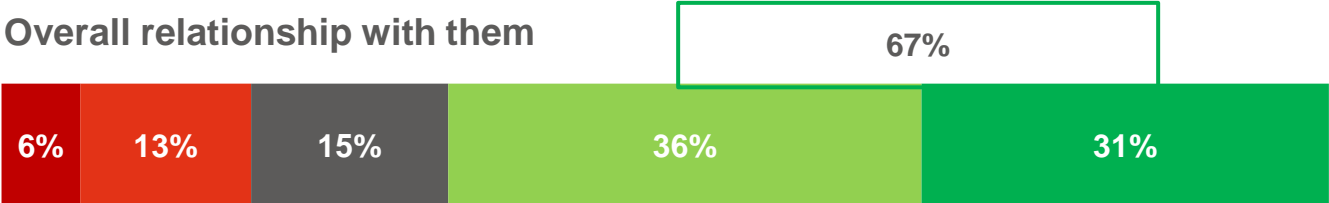


Q18. Which of the following, if any, were you given at the start of your tenancy? (All tenants: 1,200) Q17. Did you pay a deposit for the property you currently live in? (All tenants who provided a response: 1,191).

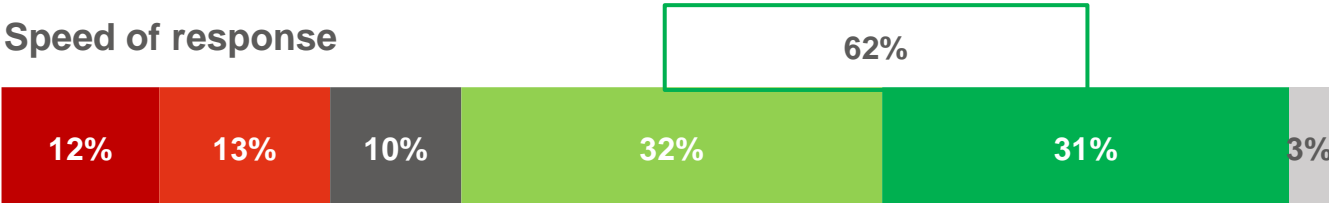
Satisfaction with property management

Overall, at least 6 in 10 tenants are satisfied with how their property is managed. However, satisfaction varies based on who their property is managed by, with satisfaction on each measure highest when properties are managed directly by a private landlord.

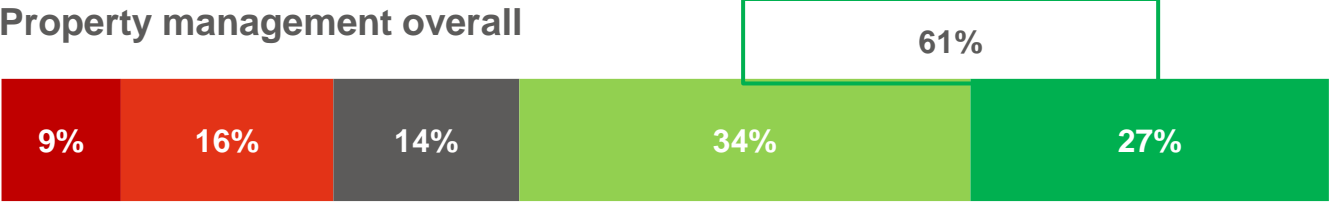
Overall relationship with them



Speed of response



Property management overall



% satisfied

Property manager:	Private landlord	A letting agent	Both landlord & letting agent
Overall relationship	72%	60%	58%
Speed of response	68%	56%	55%
Property management	66%	55%	56%

Dissatisfaction with property management particularly **high** among:

- Have a disability (37%) or permanently sick/disabled (40%)
- Bisexual (38%)

■ Very dissatisfied
 ■ Fairly dissatisfied
 ■ Neither satisfied not dissatisfied
■ Fairly satisfied
 ■ Very satisfied
 ■ Not applicable

Q06. Thinking about this individual or organisation that manages your current property, how satisfied or dissatisfied are you with ...? (All tenants: 1,200).

Satisfaction with property

Two thirds (67%) of tenants are satisfied with the condition of their current property and fewer (58%) think their rent represents good value for money. As with property management, tenants with a disability stand out as a group less satisfied on both these aspects. Satisfaction with value for money of rent declines as monthly rents increase.

Condition of property



Rent represents good value for money



- Very dissatisfied
- Fairly dissatisfied
- Neither satisfied not dissatisfied
- Fairly satisfied
- Very satisfied

Dissatisfaction with 'Condition of property' particularly high among:

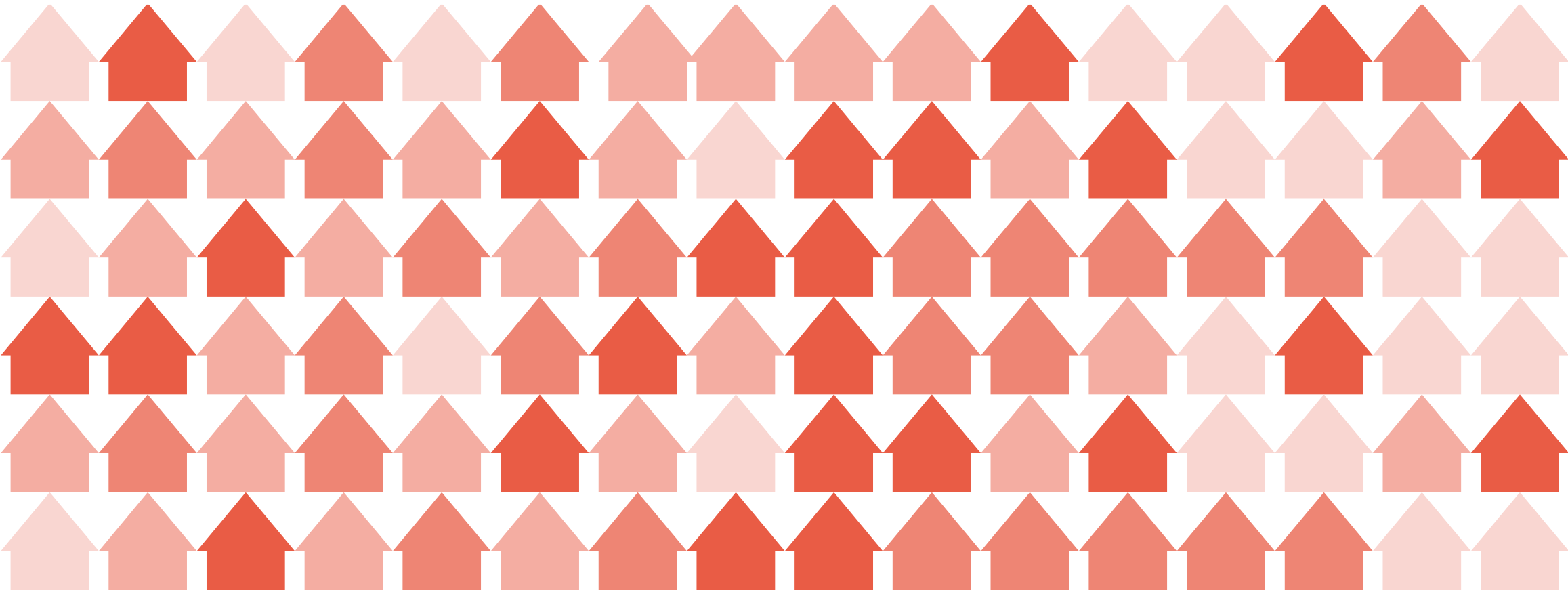
- Have a disability (35%)
- 'Forced' to live in PRS (27%)
- Struggling to pay rent (30%)
- Receive housing benefits (28%)

Satisfaction with 'Rent represents good value for money' particularly high among:

- Least deprived (IMD 5) (84%)*
- Do not have a disability (63% vs. 46% among those who do)
- Heterosexual/straight (63% vs. 43% Bisexual & 41% Gay or lesbian)
- In current home 10+ years (68%)
- Property managed by private landlord (65% vs 52% for letting agent & 44% both)
- Paying up to £499 in rent per month (67% vs. 46% among those paying £1,000+)

Q07. Overall, how satisfied or dissatisfied are you with the following when thinking about the property you are currently renting...? (All tenants: 1,200) *Low base (under 50).

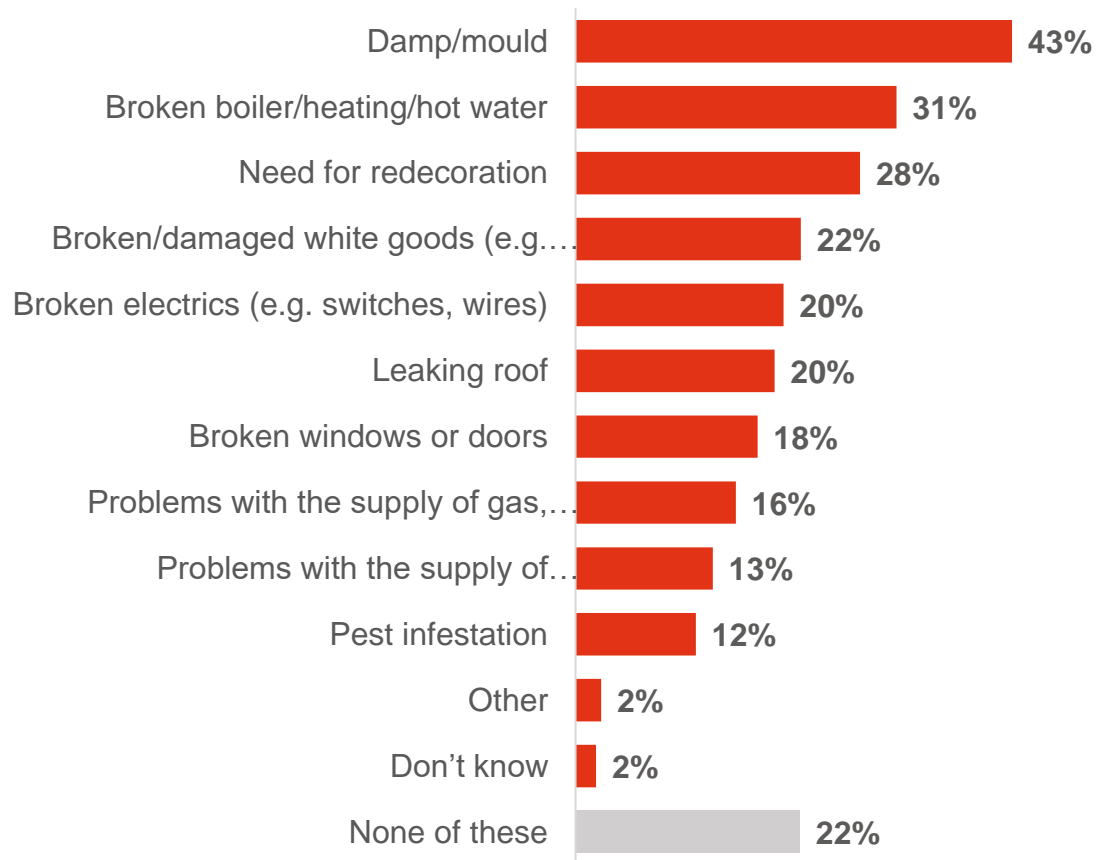
Problems experienced



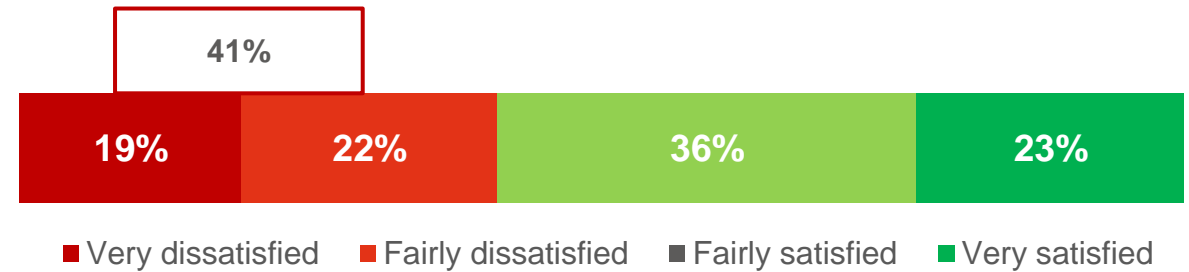
Problems experienced and resolution

Three-quarters (76%) of tenants have experienced a maintenance problem in the last year, with just over 2 in 5 (43%) that have experienced damp or mould. The majority have been satisfied with how problems have been resolved, however 2 in 5 tenants have been left dissatisfied.

Problems experienced in a private rented home in the last year



Satisfaction with how these issues have been resolved



Dissatisfied higher among:

- Live in Manchester (52%)
- Non-binary/trans/other (72%)*
- Have a disability (50%)
- Gay or lesbian (53%)
- Property managed by letting agent (46%) or both agent & landlord (47%) rather than the landlord (37%)
- Dissatisfied with relationship with their property manager (83%)
- Dissatisfied living in PRS (80%)
- City centre (incl. Trafford) (55%)

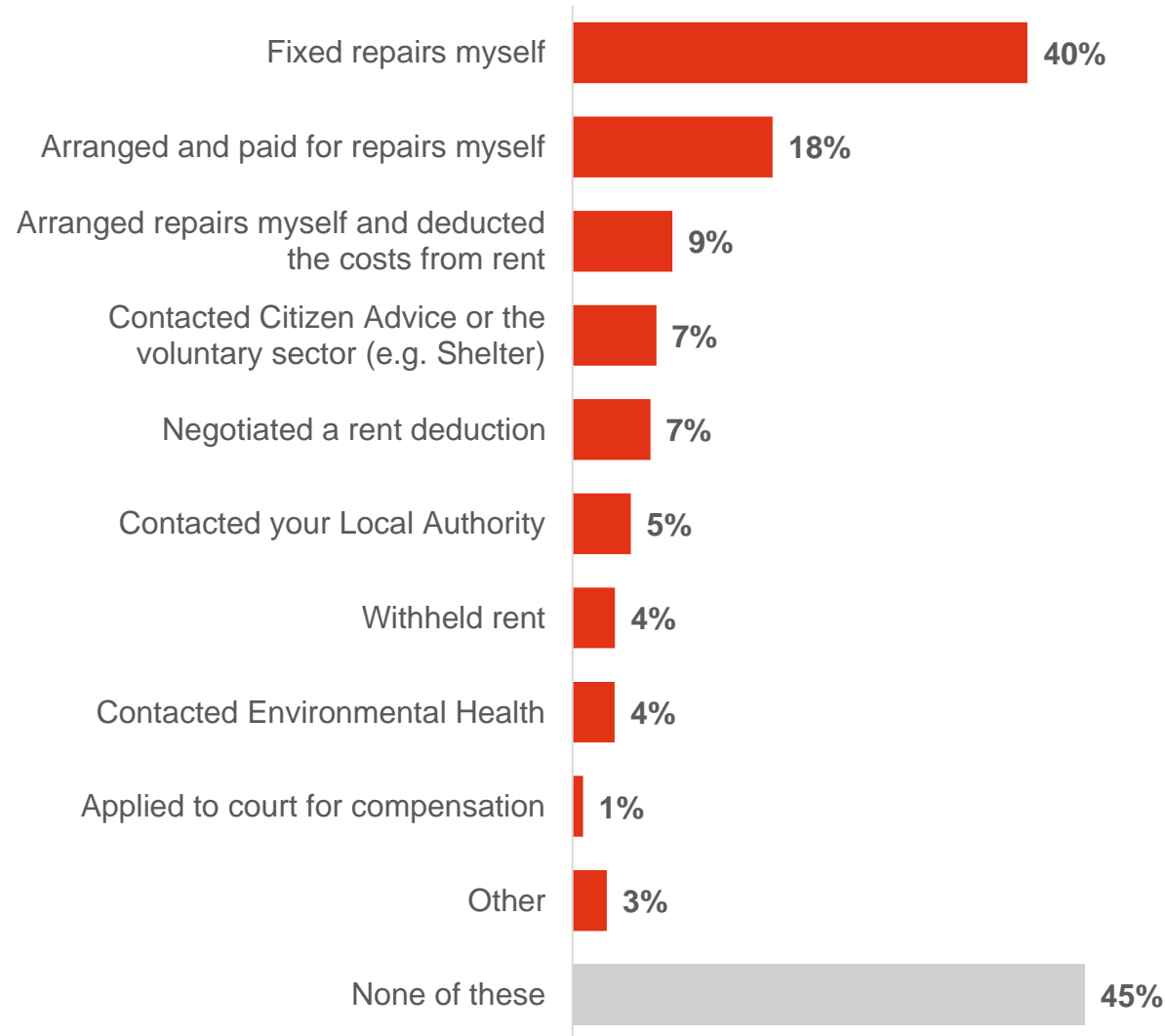
Q19. Have you experienced any of the following problems in a private rented home in the last year? (All tenants: 1,200) Q20. Overall how satisfied or dissatisfied are you with how these issues have been resolved? (All tenants who provided a response: 917) *Low base (under 50).

Actions taken by tenants

Over half (55%) of tenants have taken action themselves to solve a problem in their property.

Just under half (47%) have fixed, arranged or paid for repairs themselves and just over 1 in 10 (12%) have escalated the problem to a local authority.

Action tenants have taken to solve any of these problems



Within all the categories of actions listed (totalling 55%) it's particularly high among:

- Families with children (62%)
- Have a disability (64%)
- Bisexual (65%)
- Longer term PRS tenants (6+ years, 60%)
- Have moved 4+ times in the last 5 years (73%) and who have not moved but looked (68%)

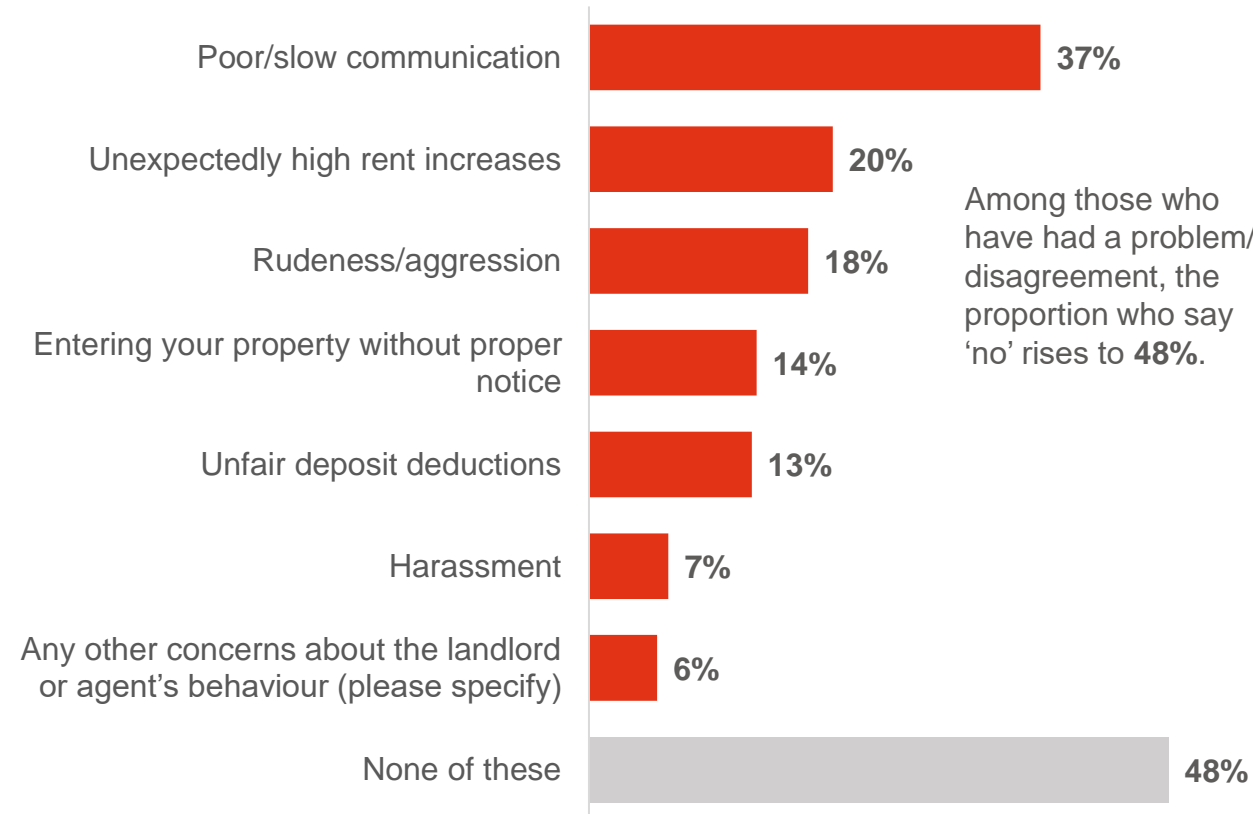
Disagreements and complaints

Over half (52%) say they have ever had a problem or disagreement with a landlord/letting agent.

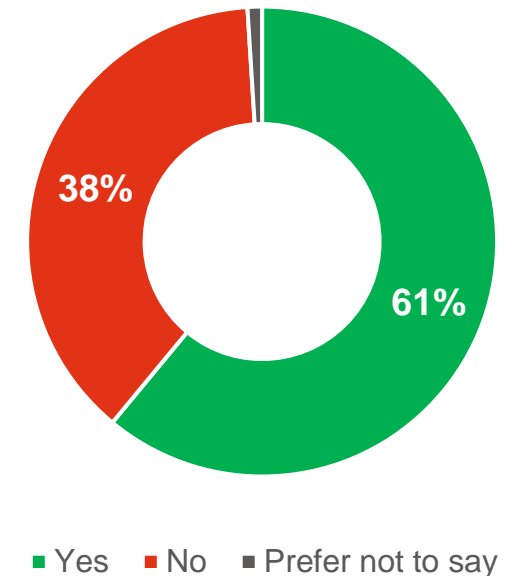
Over a third (37%) of problems relate to poor/slow communication from the landlord or letting agent and 1 in 5 (20%) have had an unexpectedly high rent increase.

2 in 5 tenants do not know where to complain to when they have issues.

Types of problems or disagreements tenants have had with a landlord/letting agent



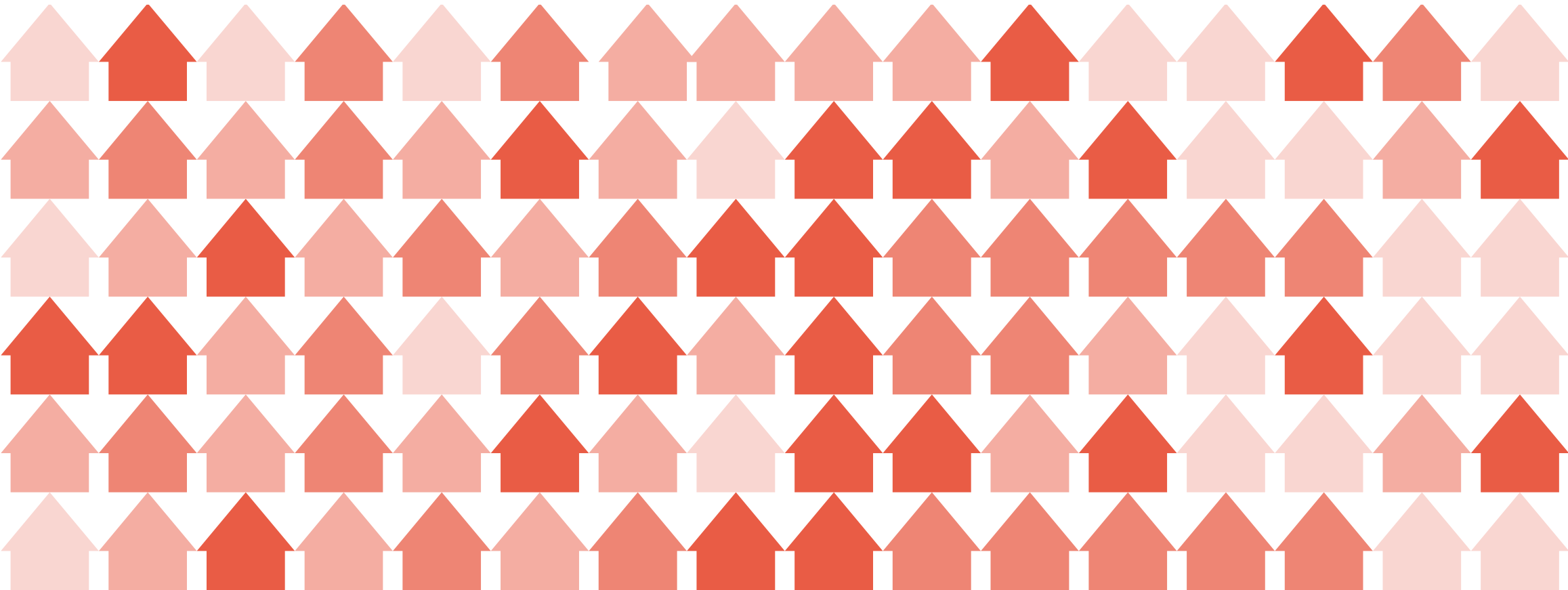
Whether tenants know where to complain if they needed to



Other concerns include: Refusal to make repairs and Unlawful eviction.

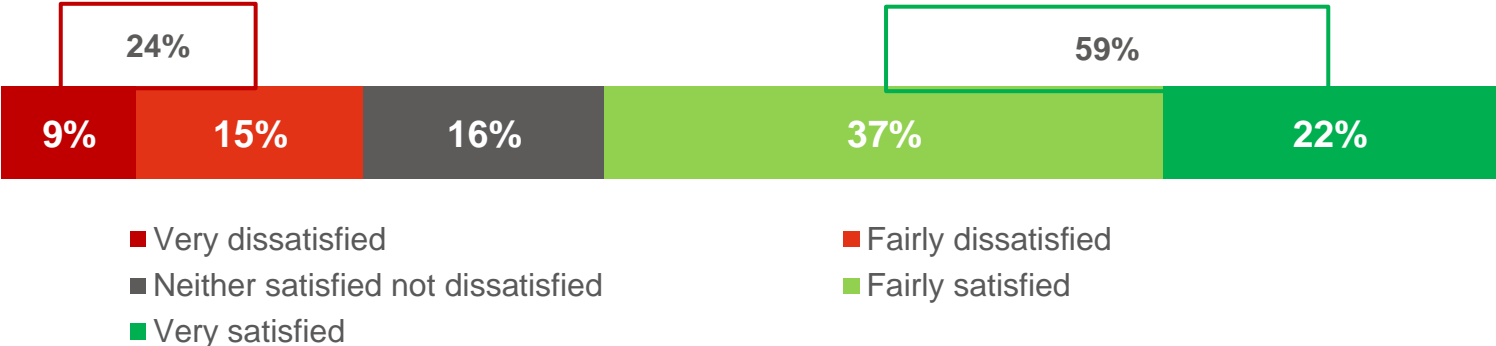
Q22. Have you ever had any of the following problems or disagreements with a landlord/letting agent? (All tenants: 1,200) Q23. If you needed to make a complaint about your current property, would you know where to complain? (All tenants: 1,200).

Overall satisfaction



Overall satisfaction: tenants

Overall, 6 in 10 (59%) tenants are satisfied with living in private rented accommodation; a quarter (24%) are not. Satisfaction is higher when properties are managed directly by landlords, rather than letting agents, and lowest when managed by both. Dissatisfaction increases to 2 in 5 among some groups of tenants, including those who are bisexual and tenants who constantly struggle to pay their rent.



Property manager:	Private landlord	A letting agent	Both landlord & letting agent
% Satisfied	63%	57%	50%
% Dissatisfied	19%	29%	31%

Dissatisfaction is higher among:

- Tenants with a disability (37%)
- Bisexual (40%), gay or lesbian (36%)
- Have been in PRS for 10+ years (33%)
- 'Forced' to live in PRS (31%)
- Had a problem/disagreement with landlord (40%)
- Those dissatisfied with their property manager (72%)
- Consider landlord accreditation very important when looking for a property (31%)
- Rent is a constant struggle (42%)
- Room in shared house/flat without a lock (35%)
- City centre location (incl. Trafford) (37% vs. 23% non-city centre)

Q24. Overall, how satisfied are you with living in private rented accommodation? (All tenants: 1,200) Q24b. What is the main reason you feel dissatisfied with renting privately? (All tenants who are dissatisfied: 108).

Reasons for dissatisfaction (I)

Affordability tops the reasons for dissatisfaction, though many of these comments are coupled with poor living conditions and problems experienced with repairs.

The top 5 reasons for dissatisfaction:

1. Cannot afford rent/deposit (35%)
2. Never fix problems with property (20%)
3. Lack of security (13%)
4. Lack of care about tenants (12%)
5. Poor repairs or damp/mould (11% and 8% respectively)

“No stability or feeling of belonging. Inability to put down roots. The overriding **worry** that we will have to move at short notice (5 times in 7 years). **Fear** of any excuse being used to get rid of us if we cause a "fuss" about the state of repair.”

Tenant, Male, Trafford

“Been waiting for **repairs** for over a year. Landlords passed everything over to the letting agent to be dealt with - still waiting. **Now want to put the rent up** by an extra 300 pound a month.”

Tenant, Female, Stockport

“My security, safety and quality of life is **at the whim of random individuals and companies**. I have lived in 12 places in the last 10 years and several times had to move because of a **huge rent hike**, an unlawful eviction, harassment or poor quality housing.”

Tenant, Female, Manchester

“**Repairs** are never done, deposits always get taken even when you’ve been a model tenant (this is really difficult to access, as you need a statutory declaration), new no deposit option scheme just **takes extra money from you** and you have no option to get it back.”

Tenant, Female, Bury

Reasons for dissatisfaction (II)

Several tenants mention feeling trapped, scared and fear losing their home if they complain too much

“I have no control over when I will be made to move or the conditions I have to live in. I was left with **no electricity for two weeks** this November when the fuse board was condemned and for **over a month in winter with no heating or hot water** when the 29 year old boiler broke a few years ago. I'm **too scared** if I complain that I will be made to move and loose all my savings.”

Tenant, Male, Manchester

“Too expensive, bad quality, **trapped** in a cycle where I pay more in rent than I would on a mortgage, but I can't buy a house.”

Tenant, Male, Manchester

“Mould, a shower which leaks into the kitchen waiting for over two years to be fixed. Leaks in the roof, no insulation, blown double glazing so really energy inefficient. High rent but poor product, but **trapped** because all rentals are the same and it costs so much to move.”

Tenant, Female, Bury

“No real sense of security. Rent increases ridiculous sums every year and you move from one place to the next, never able to decorate your own living space or really make it your own.”

Tenant, Female, Rochdale

“So much stress to find a suitable property that would accept our income (benefits) that we feel as though **we can't complain for fear of losing our home**. The **property isn't looked after** but again complaints mean **rent rises** and we can't afford them because the landlord won't accept housing allowance.”

Tenant, Female, Salford

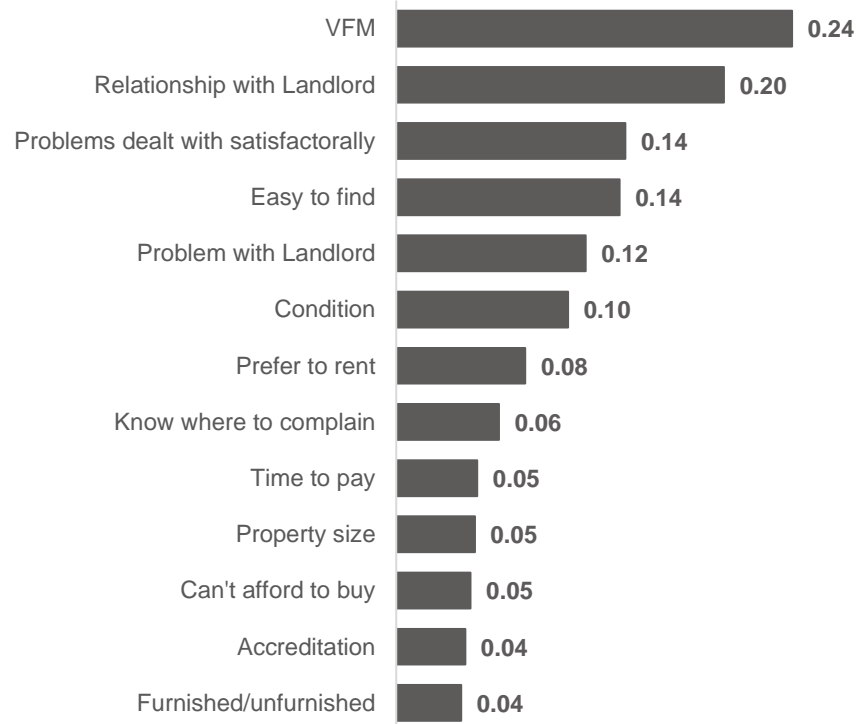
“Landlords and letting agents do not care about tenants, but generally only care about money. Promises to make repairs at the beginning of a tenancy are often not kept or take 6 months plus to resolve. You will be looking for a new place by this time, or they will evict you for complaining about the problems. Letting agents **tell lots of lies** about things to get you to sign so they make their commission.”

Tenant, Male, Salford

Key drivers of tenant satisfaction

Using regression analysis, 13 variables have been identified as significantly influencing overall satisfaction with living in the PRS. Whilst all factors shown have a significant impact on satisfaction, tenants' property providing value for money is the most important of these, and twice as important as the 5th key driver whether they have experienced problems with their landlord. Relationship with landlord is second most important.

Relative importance of key drivers

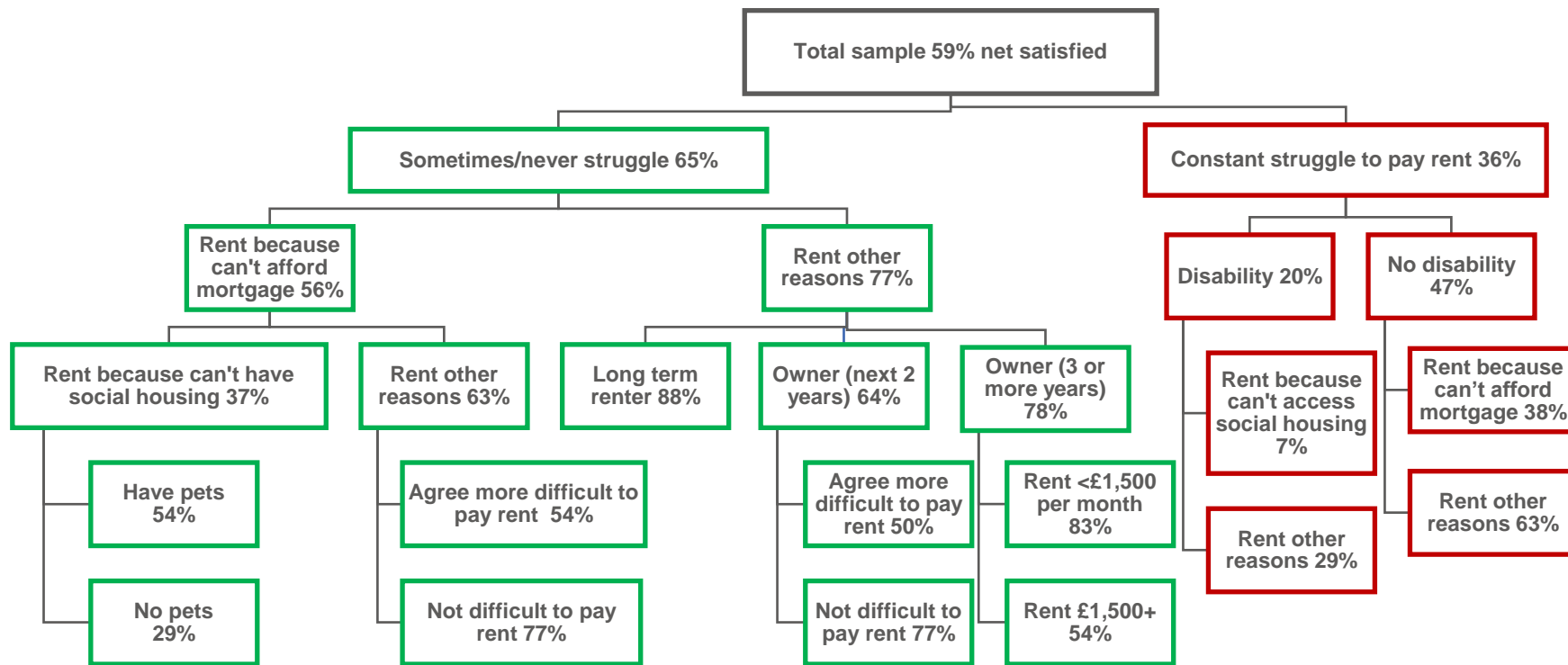


	13 Key Drivers	More/less likely to give high satisfaction score
1	Q7. Rate their property as good value for money	More
2	Q6. Have a good relationship with their landlord	More
3	Q19/20. Dissatisfied with the way problems had been dealt with were less likely to give a high satisfaction score	Less
4	Q9. Found it easy to find rental properties	More
5	Q22. Had experienced problems with landlord (e.g. slow communication, rudeness/aggression etc.)	Less
6	Q7. Satisfied with the condition of their rental property	More
7	Q1. Live in rental properties because it's their preferred choice	More
8	Q23. Know where to complain	More
9	Q30. Think it's a priority to give struggling tenants time to pay rent	More
10	Q12. Prioritize property size	More
11	Q1. Rent because they cannot afford to buy	Less
12	Q12. Think Landlord Accreditation is a priority	More
13	Q12. Prioritise a furnished property	Less

*data combined from Q19 and Q20 coded 0=no problem, 1=problems satisfactorily dealt with, 2=problems fairly dissatisfied with resolution, 3=problems and VERY dissatisfied with resolution.

CHAID analysis (1)

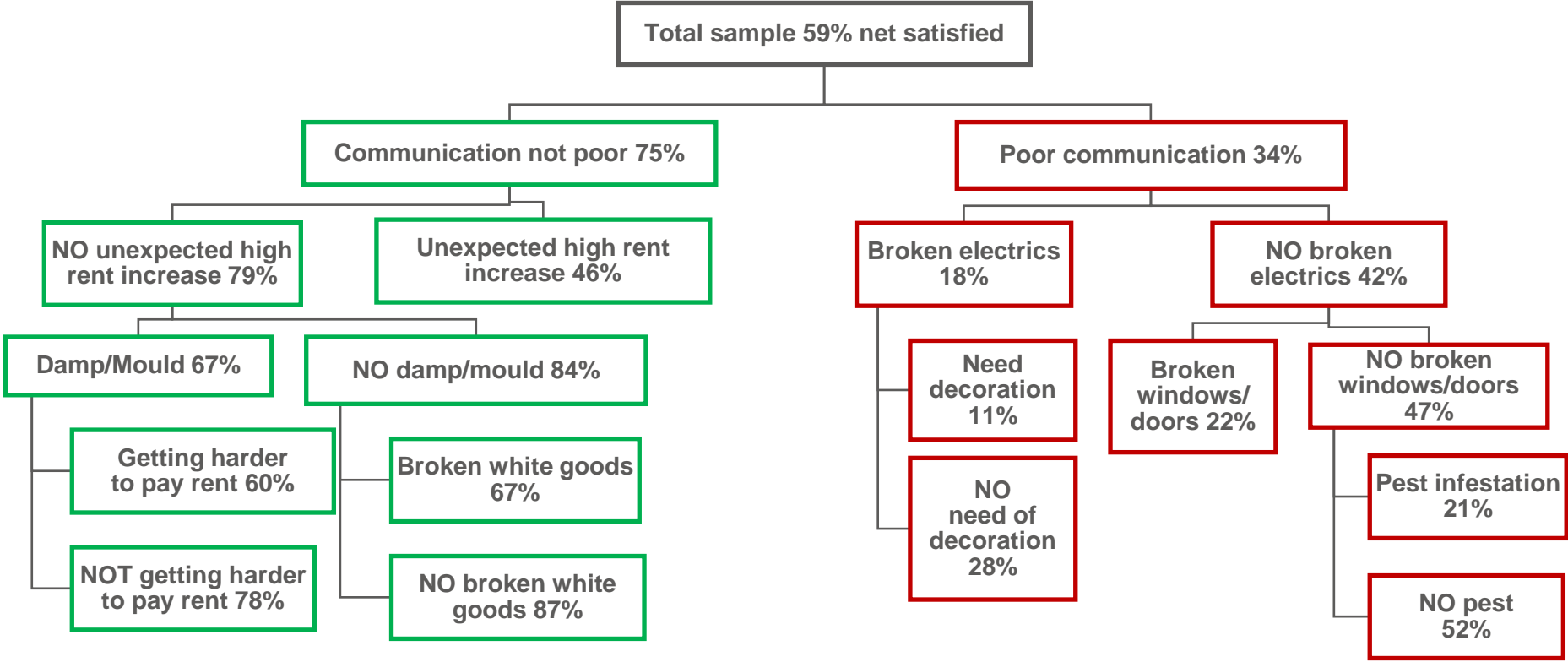
CHAID analysis helps identify sub-groups to target when trying to improve tenant satisfaction. By following the paths or branches we find groups where the difference in satisfaction is greatest between them and identify those most and least satisfied



- Tenants who DON'T constantly struggle to pay rent AND rent for other reasons than not being able to afford the mortgage AND think they'll be long term renters have the highest satisfaction (88%).
- Tenants who DON'T constantly struggle to pay rent AND rent for other reasons than not being able to afford mortgage AND plan to get a mortgage in 3 or more years AND pay less than £1,500 per month have a high satisfaction score (83%).
- Tenants who DO constantly struggle to pay rent AND have a disability AND rent because they can't access social housing have especially low satisfaction with living in the PRS (7%).

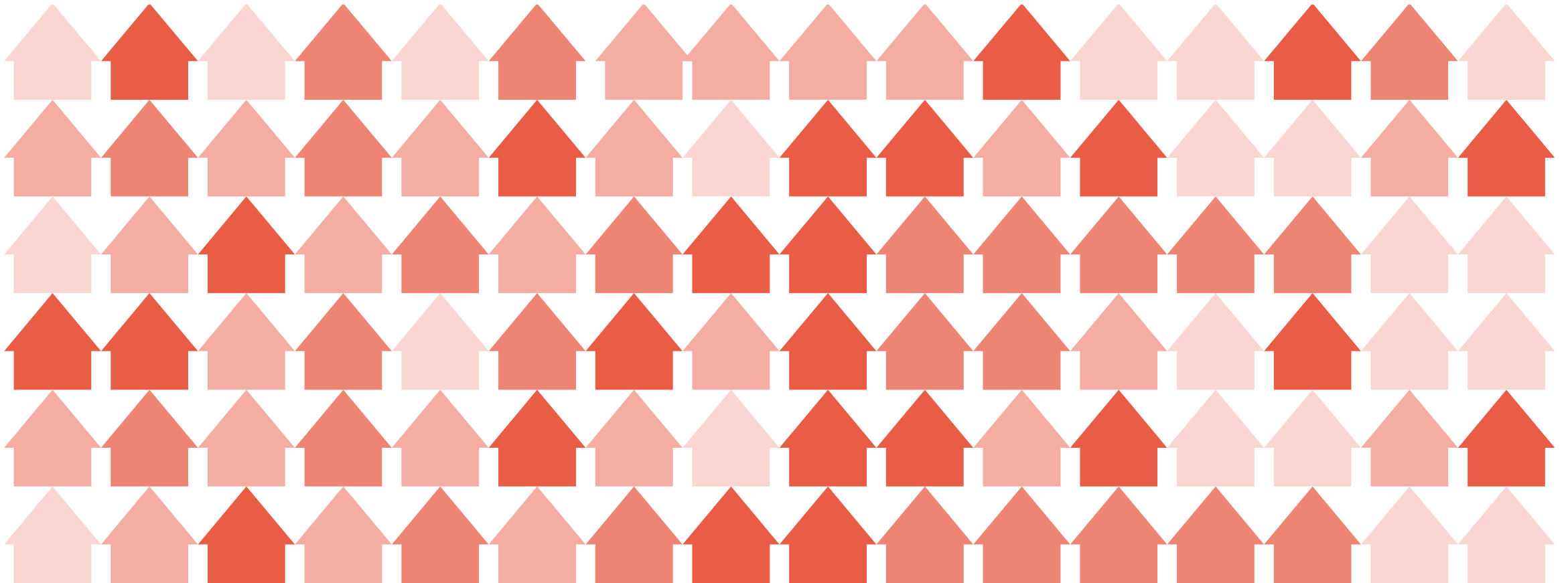
CHAID analysis (2)

In the second CHAID we look at which problems/interactions have an impact on satisfaction it's interesting that communication with landlord is the top branching – this is a really key aspect of tenancy.



- The pathway to a 'happy' tenant is good communication with Landlord AND no unexpected rent rises AND no damp/mould AND no damaged/broken white goods i.e. leading to the highest satisfaction score (87%).
- The pathway to an unhappy tenant is poor communication with landlord AND Broken electrics AND need for decoration, with the lowest satisfaction score (11%)

What is a good landlord?

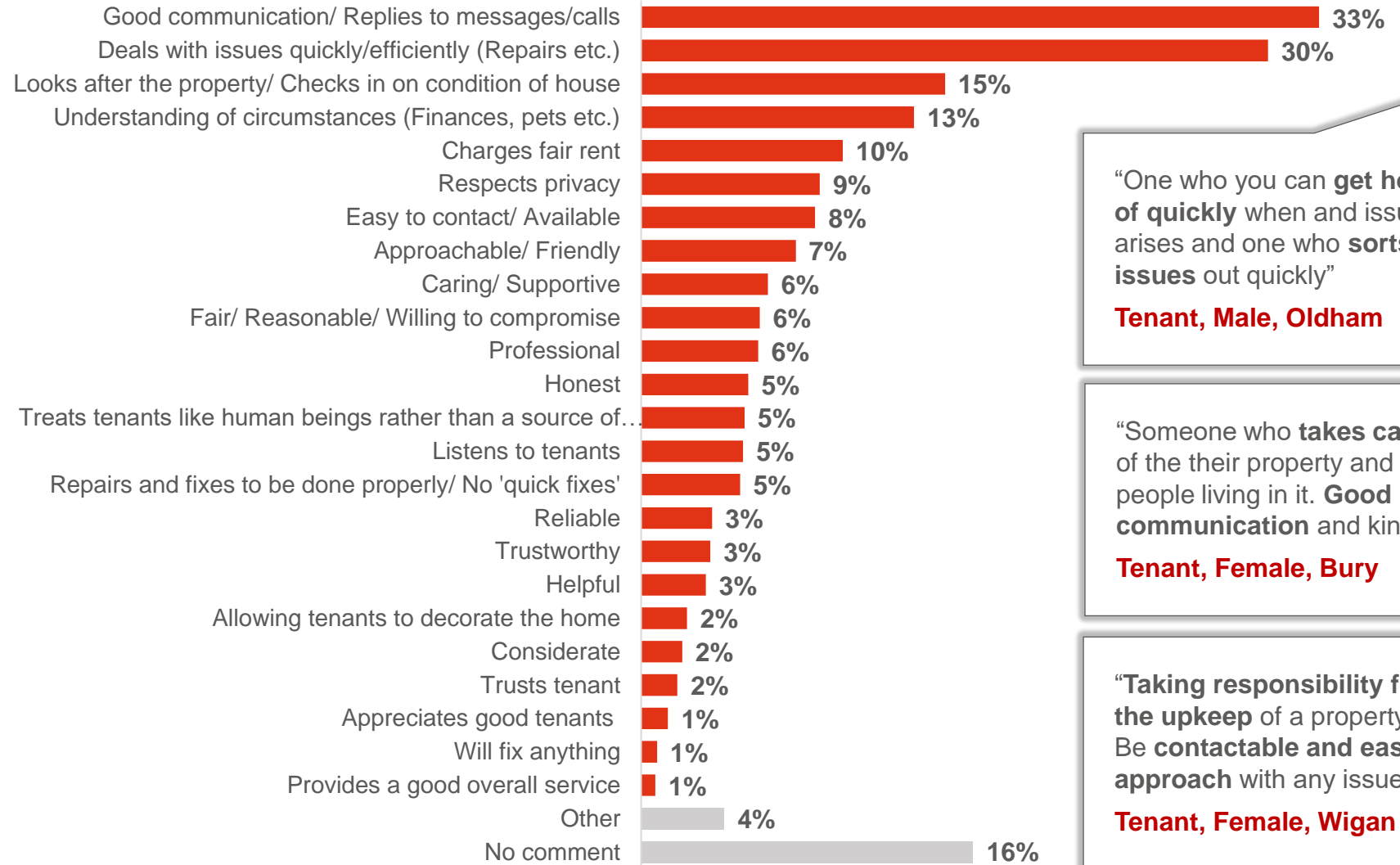


A 'good landlord'

When asked in their own words to describe what makes a good landlord tenants prioritise good communication and quick repairs.

A landlord who looks after the property and is understanding of circumstances also feature highly.

What makes a 'good landlord'



“One who you can **get hold of quickly** when an issue arises and one who **sorts issues** out quickly”
Tenant, Male, Oldham

“Someone who **takes care** of their property and the people living in it. **Good communication** and kind.”
Tenant, Female, Bury

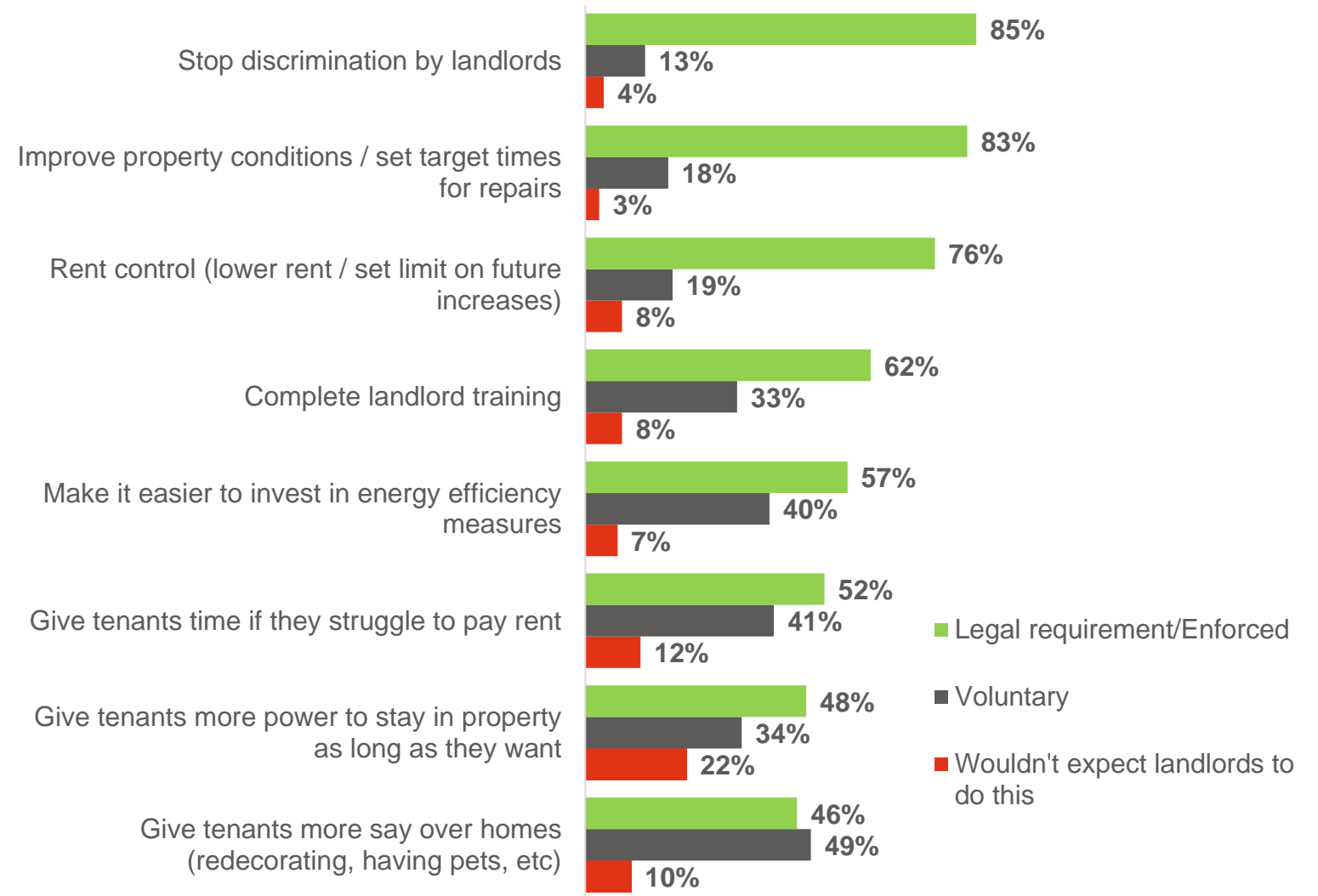
“**Taking responsibility for the upkeep** of a property. Be **contactable and easy to approach** with any issues.”
Tenant, Female, Wigan

Legal requirements vs voluntary

At least three quarters of tenants each think that stopping discrimination, improving property conditions or rent control should be legal requirements enforced by regulation.

Tenants are least likely to expect enforcement for giving tenants more power to stay in properties as long as they want (48%) or for giving tenants more say over homes (46%).

What should be a legal requirement vs voluntary

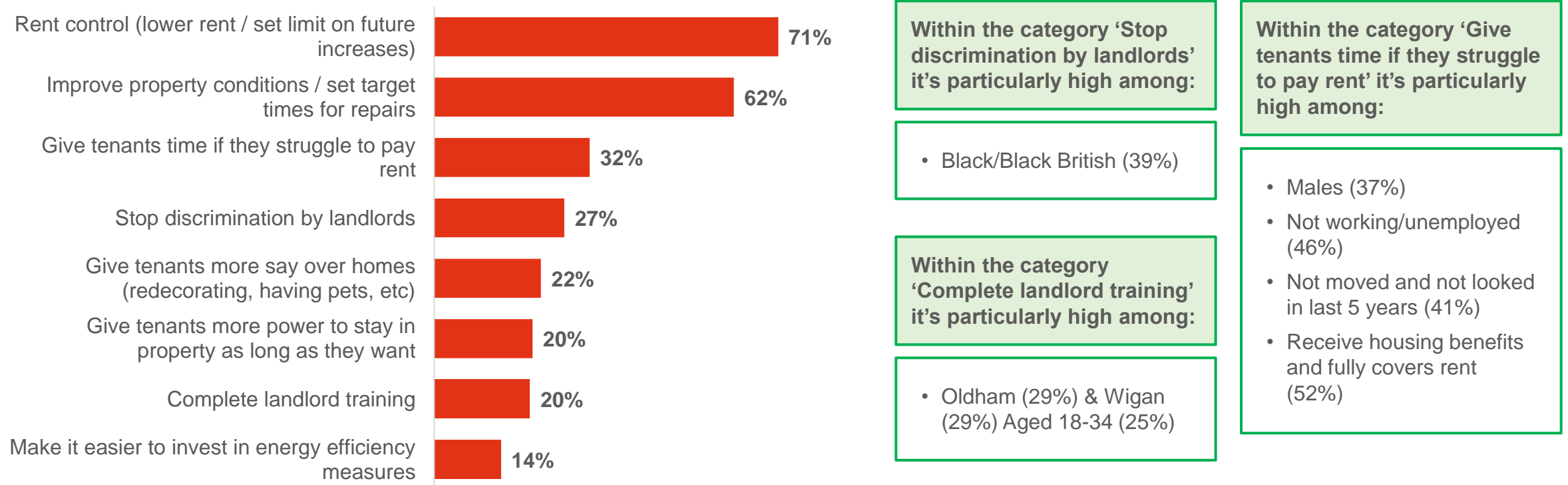


Q29. Which do you think National Government and local councils should make landlords do through legal requirements or regulations and which do you expect landlords to do voluntarily? (All tenants who provided a response: bases vary).

Priorities for enforcement

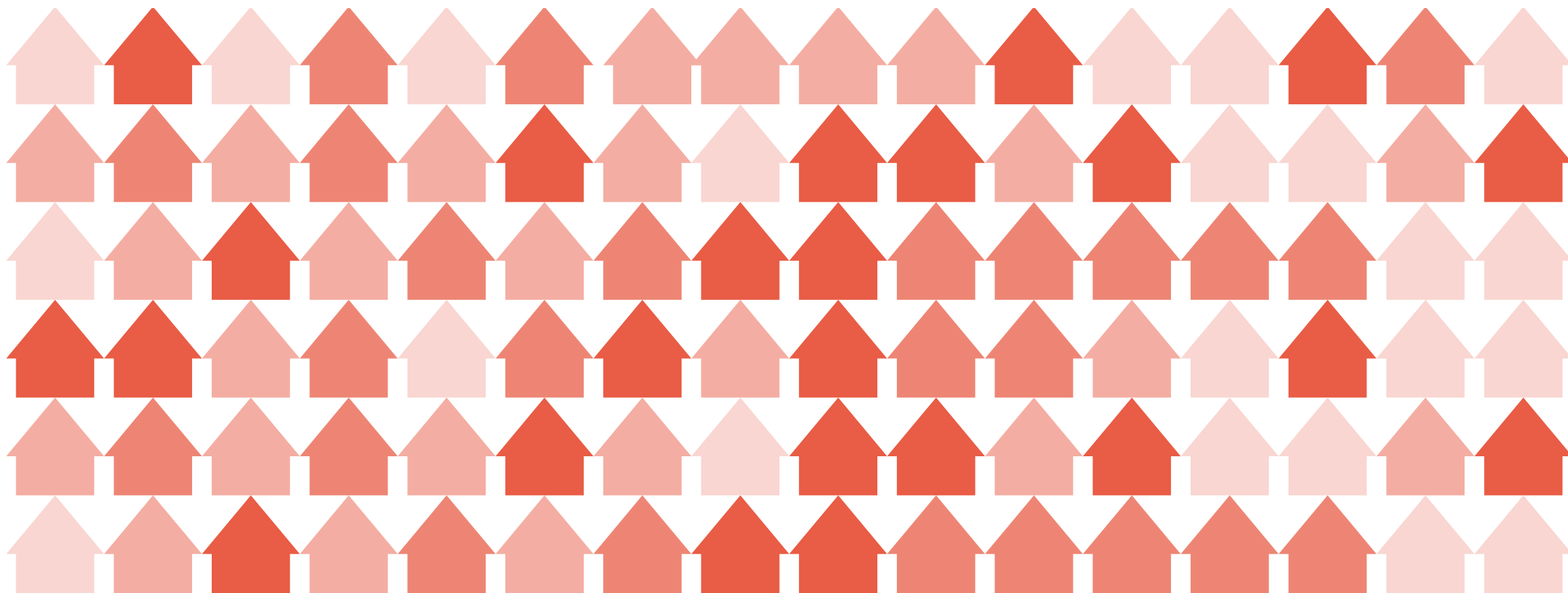
When asked to select their top 3 priorities for National Government and local councils to make or encourage landlords to do, rent control is tenants' top priority, followed by improved property conditions.

Top three priorities for National Government and local councils to make or encourage landlords to do



Q30. And what do you think the top three priorities should be for National Government and local councils to make or encourage landlords do? (All tenants, except those who wouldn't expect landlords to do anything (1,195).

Appendix



Survey contents

Tenants

- **Characteristics** – postcode/district, age, gender, ethnicity, employment status, sexual orientation, disability, financial situation, household composition, whether they have pets.
 - **Tenancy** – length of time in private rented accommodation (in total), time in current home, ideal length of tenancy, how long they are likely to be in private rented accommodation for, who property is managed by, information received at start of tenancy & whether paid deposit, property type, main reasons for renting, where they lived previously, number of times moved in past 5 years.
 - **Satisfaction** – with property management, property condition, value for money for rent, with living in private rented accommodation generally, with resolution of problems/repairs.
 - **Looking for rental properties** – how they found current property, ease of finding property, reasons for difficulties, importance of various factors when looking for a property, extent to which landlord being accredited would make a difference.
 - **Problems experienced** – with property condition/repairs needed, disagreements with landlord/letting agent.
 - **Finances/rent** – ability to pay rent, when rent was last increased, how much rent they pay.
 - **Good landlord** – what makes a good landlord (open question), expectations of landlords (voluntary vs. legal requirement), priorities for National government & local councils to make or encourage landlords to do.
 - Willingness to take part in further research.
-