

The condition of London's Private Rented Sector



Report

May 2011

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Executive Summary

Background

- S1 This short report is written as background to debates to be held by the London Assembly in June and July on the state of the Private Rented Sector (PRS) in London. Fordham Research has carried out Private Sector Stock condition surveys for some 20 of the 33 Boroughs in London over the past decade. They represent a unique database on detailed stock condition within London.
- S2 A set of four Boroughs was selected to broadly represent three zones of London:

Table S1 Sample Boroughs within three sub-areas of London	
Location	Councils
Inner London	Islington; Kensington and Chelsea
Mid-London	Ealing
Outer London	Hillingdon

Source: London Private Sector Stock Condition Profile 2011. This is Table 3.1 of the main report

- S3 The sample was adjusted by indexing to the present day, and was re-weighted to reflect current tenure, vacancy rate and demographic profile. The dataset was adjusted to reflect the same SAP (Standard Assessment Procedure) and Decent Homes Standard based on the HHSRS (Housing Health and Safety Rating System) standard. The data was limited to the PRS and does not include the social rented sector.
- S4 The overall sample contained 1,351 PRS dwellings, which is sufficient to produce reliable results. The sample represents 107,757 dwellings across the four Boroughs.

Characteristics of the sample

- S5 The dwellings involved are generally older ones: nearly half are pre-1919 (a benchmark used in such studies). About a third are converted flats and a third are purpose built flats. Much of the remainder is terraced stock, and very little is either semi-detached or detached. Correspondingly, the average size is below the average. The number of 'habitable rooms' per dwelling is 4.0, as compared with 4.9 for the owner-occupied sector, and the average floorspace is 93m² as compared with 106m² for owner-occupied dwellings.

- S6 The HHSRS is a system designed to show whether dwellings pose a risk to the health and safety of their occupants. It focused upon threats to health and safety rather than degrees of comfort and convenience. The system measures 'hazard' scores and then arranges them into categories. Category 1 is the most serious one, and is measured in three bands A-C. Category 2 is measured in six bands D-I and the final Category of 'no hazards' (meaning low hazard scores) has a single band J.

Key results for the overall London sample

- S7 Measured according to the HHSRS, the following are the numbers of dwellings in the PRS in the various categories:

Table S2 Grouped hazard scores		
<i>Category of worst hazard</i>	<i>Private rented sector</i>	<i>Owner-occupied</i>
Category 1	14.8%	9.6%
Category 2	29.7%	25.9%
No hazards	55.4%	64.6%
Total	100.0%	100.0%

Source: London Private Sector Stock Condition Profile 2011. This is Table 2.4 of the main report.

- S8 This shows that the PRS contains one and a half times (1.54) as many Category 1 dwellings than the rest of the private sector: the owner-occupied dwellings. The number of PRS dwellings with Category 2 hazards is higher in the PRS and the overall proportion with a hazard is about half for the PRS, compared with roughly a third for the owner-occupied sector.
- S9 The actions required to address the hazards are classified into three tiers of repairs: urgent, basic and comprehensive. In order to compare dwellings of various sizes there is a 'standardised repair cost' per square meter of floor area. Using this measure on the sample produces the following comparison between PRS and owner-occupied sectors:

Table S3 Overall repairs cost (Average cost per dwelling including those requiring no work)		
<i>Repairs category</i>	<i>Private rented sector</i>	<i>Owner-occupied</i>
Urgent repair	£2,044	£1,675
Basic repair	£2,919	£2,445
Comprehensive repair	£5,064	£6,039
Standardised repair cost (/m ²)	£36.2	£26.6

Source: London Private Sector Stock Condition Profile 2011. Table 2.5 of the main report.

- S10 As can be seen, and corresponding to Table S2, the repair costs are considerably higher across the range for the PRS as compared to the owner-occupied sector.

- S11 The official Decent Homes standard is based on 'decency'. This implies no Category 1 hazards and is reasonable in terms of repair, modern facilities and services and thermal comfort (insulation). There is a related concept of the 'cost to make decent'. The following table provides the detail:

Table S4 Non-decent homes		
<i>Decency</i>	<i>Private rented sector</i>	<i>Owner-occupied</i>
Decent	67.7%	75.2%
Non-decent	32.3%	24.8%
Total	100.0%	100.0%
Average cost to make decent (non-decent homes only)	£4,967	£3,522

Source: London Private Sector Stock Condition Profile 2011. Table 2.6 of the main report

- S12 As can be seen, the figures provide a neat pattern: a third of the PRS is non-decent, while only a quarter of the owner-occupied sector is non-decent. The reasons for non-decency break down fairly evenly across the four tests: Category 1 hazards, disrepair, modern facilities and thermal comfort.
- S13 In terms of energy efficiency, and again comparing the PRS with the owner-occupied sector, the PRS has much less double glazing (45% vs. 54%), roughly the same wall insulation (two thirds of dwellings), less loft insulation and considerably less central heating (77% with radiators compared with 89% for the owner-occupied sector. In terms of the source of energy, the PRS shows a lower proportion of gas-based heating (84% compared with 93% for the owner-occupied sector).
- S14 The SAP system is used for energy rating. It is characteristic of the building fabric, the heating system, the ventilation and solar gain characteristics and the price of the fuels used for heating (both space and water). Measurement must take account of the particular layout and equipment as well as household size and composition as these all affect the outcome. The SAP measure is not affected by geographical location. The result shows an average SAP of 56 for the PRS and 55 for the owner-occupied sector: the lower the rating the better. So clearly the PRS is worse. In CO² emissions the PRS is actually better than the owner-occupied sector (5.3 tonnes pa compared with 6.1, but this is more a reflection of average income and wealth).

Geographical variation in the condition of the PRS

- S15 The geographical analysis is based on the simple three way split shown in Table S1 above. There are some striking differences in the basic descriptive statistics, for example regarding length of vacancies/voids. As can be seen, the Inner London vacancies are mainly short (nearly 60% of them), and longer term vacancies grow with the move to Outer London, where they make up almost half of the total vacancies. It is likely that this reflects the unattractiveness of some of the Outer London PRS, as levels of demand are generally high across London.

Table S5 Length of vacancy of private rented dwellings

Length of vacancy	Inner	Mid	Outer
Newly vacant (less than a month)	57.2%	23.6%	17.8%
Mid term vacant (1 to 6 months)	28.9%	58.1%	34.0%
Long term vacant (6 months or more)	13.8%	18.3%	48.2%
Second/holiday home	0.2%	0.0%	0.0%
All empty homes	100.0%	100.0%	100.0%

Source: London Private Sector Stock Condition Profile 2011. Table 3.3 of main report

- S16 The HHSRS hazard scores also fall from Inner to Outer, although our Mid (Ealing being a 'Borough of two halves') shows slightly lower values than Outer. Some 18% of the Inner London PRS dwellings show Category 1 hazards, while only 13% of those in Outer London do, and the corresponding costs to make decent are £4,300 and £2,700: quite a sharp difference.
- S17 Looking at the Category 1 hazards in terms of type of household reveals some dramatic features. The higher proportion of Category 1 hazards in Inner London relates very much to the high proportion of two or more pensioner and lone parent households in the Inner London PRS. Some 52% of the two or more pensioner households in Inner London and a third of the lone parent households live in Category 1 dwellings. By contrast Outer London has a much higher proportion of both single pensioners in Category 1 dwellings (27% vs. 5%) and of support needs households in Category 1 (37% to 12%). The other household characteristics categories (shown in Figure 3.1 of the main text and including a range of BME categories) do not reveal the same sharp differences between Inner and Outer London.
- S18 Looking at the detailed reasons for hazards (Table 3.5 of the main text) shows 'excess cold' is by far the main one (12.5% in Inner London and 9.5% in Outer London) followed by 'falls on stairs' (2.6% in Inner dropping to 1.1% in Outer London). The third most frequent hazard is 'fire' which shows a similar pattern as for 'falls on stairs'.
- S19 The costs of repairs shows a different pattern to most other features: with the highest figures shown by Mid (i.e. Ealing) as compared with both Inner and Outer London. The type of household most likely to have high costs to make decent is '2 or more pensioners'.
- S20 In terms of decent homes, all three categories show about a third non-decent (but the highest is Mid) though in terms of overall cost to make decent the same pattern of highest in Inner and lowest in Outer is shown:

Table S6 Average Cost for remedying non-decent private rented homes
(average cost per non-decent dwelling)

<i>Non-decent due to</i>	<i>Inner</i>	<i>Mid</i>	<i>Outer</i>
Category 1 hazard	£4,305	£2,019	£2,695
Disrepair	£3,941	£2,451	£3,073
Modern facilities	£5,670	£8,420	£3,767
Thermal comfort	£3,005	£2,239	£1,893
Average/total	£5,884	£4,379	£3,498

Source: London Private Sector Stock Condition Profile 2011. Table 3.9 of main report.

- S21 From the point of view of the household type of those in non-decent housing there is no strong pattern from Inner to Outer London. The '2 or more pensioner' category shows a high proportion of non-decent housing and the pattern is much stronger in Inner and Mid than in Outer. There is a very high proportion (67%) of Black households in non-decent housing in Mid-London and households with support needs are most commonly in non-decent housing in Outer London.
- S22 Energy efficiency shows some strong patterns. Only 38% of households in Inner London have full double glazing whereas 70% of those in the PRS in Outer London do. The same pattern is shown by non-cavity walls. There is no strong pattern across the three sectors for loft insulation or main heating systems. There is a greater incidence of gas used for main heating in Inner London, but as will be recalled, the PRS shows much lower incidence of gas for main heating overall than the owner-occupied sector. There is no obvious geographical variation for the SAP rating, or its variation across household types. From the point of view of CO² emissions it is notable that the '2 or more pensioner' category in Inner London has by far the highest reading (13 tonnes of CO² with the second highest being 2+ adults and 2+ children also in Inner London (9 tonnes of CO²).

Overview

- S23 This report provides only an overview of the problems of the PRS in London. It is based on data from only four of the 33 Boroughs, although the geographical variation (Inner, Mid and Outer) works quite well. The typical pattern (e.g. Category 1 'excess cold' hazard shows a sharp decline from Inner to Outer).
- S24 When compared with the owner-occupied sector the overall condition of the PRS is shown to be much worse. Category 1 unfitness is one and a half times worse, and about a third of PRS dwellings are non-decent, compared with a quarter for owner-occupied housing. Although the unsurprising emphasis is upon the poor quality of PRS housing in Inner London it is notable that there is a high proportion of long term vacancies in the PRS of Outer London (48% for Outer as compared with 14% for Inner).
- S25 The evidence of this database is that the PRS in London is a cause for serious concern and clearly a serious policy issue.

1. Introduction

Scope and purpose of this report

- 1.1 This report is written in the context of the London Assembly Report to Planning and Housing committee for decision on 17th May 2011. In the Report (paragraph 4.14) the Assembly identifies five issues:
- i) What is the state of London's private rented housing?
 - ii) What main improvements are needed and how can they be delivered?
 - iii) To what extent has the Mayor's efforts to improve the standard of private rented housing proved successful?
 - iv) What examples are there of programmes that are having a significant impact on improving London's private rented housing?
 - v) Is there a need for the Mayor to drive further efforts to improve this sector?
- 1.2 The present report is limited to 'setting the scene' for the main debate by providing as much detail as possible about the current state of and trends in the private rented sector.
- 1.3 Fordham Research is the leading consultancy in carrying out private sector stock condition surveys in London, having completed studies of 19 of the 33 Boroughs over the past decade. This database permits an in-depth investigation of the first two of the issues outlined above.

Sample of councils analysed

- 1.4 This scoping report provides detail on the condition of the private rented stock in London. It has been compiled by re-analysing existing stock condition surveys that have been undertaken recently by Fordham Research. The timescale for this project prevents a fully detailed study. The study covers four London Boroughs. The four Boroughs included have been chosen in consultation with the London Assembly.
- 1.5 They are Ealing, Hackney, Hillingdon and Kensington & Chelsea. The four detailed surveys and reports were conducted at different dates as can be seen in the table below.

Table 1.1 Survey locations and dates

Borough	Stock Condition Survey
Hackney	2009
Hillingdon	2007
Kensington & Chelsea	2006
Ealing	2004

Source: London Private Sector Stock Condition Profile 2011

Technical approach

1.6 The datasets from these four stock condition surveys have been merged to create a single database of relevant condition information. This single dataset has then been updated to best present the situation in these Boroughs in 2011 and ensure a singular base date for this project. A number of processes were used to update the dataset:

- The dataset was adjusted to ensure that the outputs were all based on the same measure (the same SAP scale and the Decent Homes Standard based on the HHSRS rather than the unfitness assessment).
- The cost improvements to the dwelling have been updated by indexing them to changes in the costs provided by the Building Cost Information Service.
- The dataset for each Borough has been reweighted to reflect the current tenure, vacancy rate and demographic profile in the Borough and changes to decency recorded regionally.

1.7 It should be noted that only the surveys conducted in the private sector (private rented or owner-occupied) have been retained and the database contains no information on the social rented sector.

Structure of this report

1.8 The report is divided into two main sections:

- i) results for the Private Rented Sector as a whole
- ii) detailed results for sectors of London.

2. Results for the private rented sector as a whole

Dwelling profile

- 2.1 This chapter provides an overview of the private rented sector in comparison to the owner-occupied sector to enable differences between the two tenures to be established. The results are presented for the study area as a whole. Overall the dataset contains results from 1,351 surveys conducted on private rented homes in London which represents 107,757 dwellings across the four Boroughs included in this study. The dataset also contains the results of the surveys of 2,143 owner-occupied properties which represent 206,393 dwellings across the study area.

Table 2.1 Age of private sector dwellings		
<i>Dwelling age</i>	<i>Private rented sector</i>	<i>Owner-occupied</i>
Pre-1919	44.5%	34.1%
1919-1944	21.9%	32.4%
1945-1964	11.2%	12.8%
1965-1980	9.6%	9.3%
Post-1980	12.8%	11.3%
All ages	100.0%	100.0%

Source: London Private Sector Stock Condition Profile 2011

Table 2.2 Type of private sector dwellings		
<i>Dwelling age</i>	<i>Private rented sector</i>	<i>Owner-occupied</i>
Detached	3.8%	8.2%
Semi-detached	9.6%	25.5%
Terraced	16.1%	29.7%
Converted flat	30.1%	14.7%
Purpose built flat	34.7%	21.2%
Non-residential flat	5.7%	0.7%
All ages	100.0%	100.0%

Source: London Private Sector Stock Condition Profile 2011

Size of dwellings

- 2.2 The main measure available to assess the size of dwellings is the number of habitable rooms within the property forming part of the living space. A habitable room is defined as one which could be used for living or sleeping purposes and includes kitchens which are large enough to accommodate a table and chairs at which the occupants could eat.
- 2.3 The average (mean) number of habitable rooms in a private rented property is 4.0, whilst the figure is 4.8 for owner-occupied dwellings.

Table 2.3 Number of habitable rooms		
<i>Habitable rooms</i>	<i>Private rented sector</i>	<i>Owner-occupied</i>
1-2	22.6%	10.3%
3	30.9%	19.4%
4	19.1%	23.0%
5	15.4%	24.4%
6	6.0%	11.6%
7+	5.9%	11.3%
Total	100.0%	100.0%

Source: London Private Sector Stock Condition Profile 2011

- 2.4 The overall average floorspace of private rented dwellings is 93m² compared to 106m² across owner-occupied dwellings.

HHSRS

- 2.5 The Housing Health and Safety Rating System (HHSRS) is an evidence-based risk assessment system. The HHSRS is a means of identifying faults in dwellings and of evaluating the potential effect of any faults on the health and safety of occupants, visitors, neighbours and passers-by.
- 2.6 The system grades the severity of any dangers present in the dwelling. It also provides a means of differentiating between dwellings that pose a low risk to health and safety and those which pose a higher risk, such as an imminent threat of serious injury or death. The system concentrates on threats to health and safety and is not concerned with matters of quality, comfort and convenience.
- 2.7 As part of a stock condition survey, the system can assist in identifying dangerous housing conditions that could be given priority and indicate specific areas to be targeted. For individual dwellings, the system can help determine matters that require remedial action and the priority with which those matters should be tackled.

- 2.8 The form of construction, type and age of dwelling will not affect the identification and evaluation of hazards. These matters will however be relevant to the nature of remedial action.
- 2.9 This chapter does not seek to go into any detail about the rationale behind the HHSRS but merely concentrates on the results of the analysis, how hazards vary across different groups and how sensitive the rating system is to different assumptions about what is an acceptable hazard.
- 2.10 A hazard score is a numerical figure calculated for each hazard identified at a dwelling. The higher the score, the greater the hazard. Government guidance then suggests taking the highest score for each dwelling to indicate the most serious hazard for that particular dwelling.
- 2.11 The hazard score is generated by looking at three factors:
- The likelihood expressed as a ratio – in effect this is a 1 in x chance of any particular hazard occurring in a one year period.
 - A weighting given to each class of harm – there are four classes used in the calculation (Extreme, Severe, Serious and Moderate); in the case of falls these might represent a range from death to severe bruising.
 - A spread of health outcomes indicated as a percentage – if the hazard occurs what are the chances of it being in each of the classes of harm (e.g. in the case of falls this might be no (or negligible) chance of death and 60% chance of severe bruising).
- 2.12 Once each dwelling has been assessed for each potential hazard, the data is banded to provide more useful data. The bands suggested in Government guidance are shown in the box below.

Hazard scores equivalent risk of death and suggested response

Band	Score	Equivalent annual risk of death	Response
A	5,000 or more	1 in 200 or more	Category 1
B	2,000 – 4,999	1 in 200 – 1 in 500	
C	1,000 – 1,999	1 in 500 – 1 in 1,000	
D	500 – 999	1 in 1,000 – 1 in 2,000	Category 2
E	200 – 499	1 in 2,000 – 1 in 5,000	
F	100 – 199	1 in 5,000 – 1 in 10,000	
G	50 – 99	1 in 10,000 – 1 in 20,000	
H	20 – 49	1 in 20,000 – 1 in 50,000	
I	10 – 19	1 in 50,000 – 1 in 100,000	No hazards
J	Less than 10	Less than 1 in 100,000	

- 2.13 Our main analysis therefore concentrates on dwellings with any hazard in bands A to C, although calculations of dwellings in bands D to I have also been carried out.

- 2.14 The table below shows the number of dwellings which fall into the Category 1 group on any hazard, those which fall into the Category 2 group on any hazard (excluding those in the Category 1 group) and finally dwellings with low hazard levels.

Table 2.4 Grouped hazard scores		
<i>Category of worst hazard</i>	<i>Private rented sector</i>	<i>Owner-occupied</i>
Category 1	14.8%	9.6%
Category 2	29.7%	25.9%
No hazards	55.4%	64.6%
Total	100.0%	100.0%

Source: London Private Sector Stock Condition Profile 2011

Disrepair

- 2.15 An idea of the presence of faults provides useful information about the main problem areas, but does not represent either the extent of the problems or the cost of putting them right. The standard test for such repairs is the cost to put the building into good repair. This includes all the building elements and the overall cost of rectifying any work. The survey measured three levels of disrepair:

Categories of repair measured in the survey

Category	Definition
Urgent repair	All exterior building work recorded by the surveyor as being required within the next 12 months plus any interior work identified (regardless of the time period). Typical examples of urgent repair work relate to amenities and services within the home (such as replacing old/inefficient boilers and work required to bathrooms or kitchens).
Basic repair	All works identified by the surveyor as needing to be done within 5 years, including any urgent work as described above. These do not include replacement of building elements nearing the end of their life where the surveyor recorded that this action could be delayed by more than 5 years, often by short term patch repairs. Over this longer period typical examples of work to be carried out will relate to external items such as walls, roofs and boundary walls/fences.
Comprehensive repair	This includes all repairs as specified above together with any replacements the surveyor has assessed as being needed in the next 10 years. Replacement periods are only defined for external elements and are given whether or not any repair work has been identified as needed. The replacement period is given as the number of years before the element needs replacing either following specified repair work or simply as the remaining life expectancy. In the 10 year cycle typical work will include the renewing of external items (such as windows, doors, roofs).

- 2.16 It should be noted that the above repair categories are cumulative. Consequently figures for basic repair include the costs of urgent repairs, and both are in turn included in the figures for comprehensive repairs.
- 2.17 The actual costs of work will vary depending on the size of dwellings. Therefore one further measure has been included: standardised repair costs. The definition of this is:

Standardised repair costs

The basic repair cost per square metre of floor area, calculated to remove the effect of the size of buildings and give a better measure of relative deterioration.

Table 2.5 Overall repairs cost
(Average cost per dwelling including those requiring no work)

<i>Repairs category</i>	<i>Private rented sector</i>	<i>Owner-occupied</i>
Urgent repair	£2,044	£1,675
Basic repair	£2,919	£2,445
Comprehensive repair	£5,064	£6,039
Standardised repair cost (/m ²)	£36.2	£26.6

Source: London Private Sector Stock Condition Profile 2011

Decent homes

2.18 The Government defines a home as 'decent' if it meets all of the following four criteria:

- no Category 1 hazards
- is in a reasonable state of repair
- it has reasonably modern facilities and services
- it provides a reasonable degree of thermal comfort.

Table 2.6 Non-decent homes

<i>Decency</i>	<i>Private rented sector</i>	<i>Owner-occupied</i>
Decent	67.7%	75.2%
Non-decent	32.3%	24.8%
Total	100.0%	100.0%
Average cost to make decent (non-decent homes only)	£4,967	£3,522

Source: London Private Sector Stock Condition Profile 2011

Table 2.7 Causes of non-decent homes

<i>Non-decent due to</i>	<i>Private rented sector</i>	<i>Owner-occupied</i>
Category 1 hazard	14.8%	9.6%
Disrepair	11.9%	6.8%
Modern facilities	4.1%	2.3%
Thermal comfort	17.2%	14.0%

Source: London Private Sector Stock Condition Profile 2011

Energy Efficiency

Table 2.8 Extent of double glazing

	<i>Private rented sector</i>	<i>Owner-occupied</i>
Full	44.7%	54.4%
Some	13.4%	20.6%
None	41.8%	25.0%
Total	100.0%	100.0%

Source: London Private Sector Stock Condition Profile 2011

Table 2.9 Extent of wall insulation

	<i>Private rented sector</i>	<i>Owner-occupied</i>
Non-cavity walls	65.4%	64.4%
Insulated cavity walls	9.7%	12.3%
Uninsulated cavity walls	24.9%	23.3%
Total	100.0%	100.0%

Source: London Private Sector Stock Condition Profile 2011

Table 2.10 Extent of loft insulation

	<i>Private rented sector</i>	<i>Owner-occupied</i>
Less than 100mm	19.8%	24.5%
100mm or more	23.3%	45.0%
No loft	57.0%	30.4%
Total	100.0%	100.0%

Source: London Private Sector Stock Condition Profile 2011

Table 2.11 Main heating system

	<i>Private rented sector</i>	<i>Owner-occupied</i>
Boiler with radiators	77.3%	89.4%
Electric storage heaters	7.8%	3.6%
Room heaters	7.2%	2.7%
Other system	7.6%	4.3%
Total	100.0%	100.0%

Source: London Private Sector Stock Condition Profile 2011

Table 2.12 Fuel used for main heating system

	<i>Private rented sector</i>	<i>Owner-occupied</i>
Gas	84.4%	93.0%
On-peak electric	8.4%	3.2%
Off-peak electric	6.1%	3.2%
Solid fuel	0.7%	0.5%
Oil	0.4%	0.1%
Total	100.0%	100.0%

Source: London Private Sector Stock Condition Profile 2011

The SAP rating

- 2.19 The Standard Assessment Procedure (SAP) is the Government's recommended system for home energy rating. The SAP rating is standardised for floor area so that the size of the dwelling does not strongly affect the result. A general description of the SAP rating is given below.

Definition of SAP rating

This is a Government-specified energy rating for a dwelling. It is based on the calculated annual energy cost for space and water heating. The calculation assumes a standard occupancy pattern, derived from the measured floor area so that the size of the dwelling does not strongly affect the result, which is expressed on a 1-100 scale. The higher the number the better the standard.

- 2.20 The SAP rating depends upon a range of factors that contribute to energy efficiency, namely:
- thermal insulation of the building fabric
 - efficiency and control of the heating system
 - ventilation characteristics of the dwelling
 - solar gain characteristics of the dwelling
 - the price of fuels used for space and water heating.
- 2.21 The rating is not affected by factors that depend on the individual characteristics of the household occupying the dwelling when the rating is calculated, for example:
- household size and composition
 - the ownership and efficiency of particular domestic electrical appliances
 - individual heating patterns and temperatures.

- 2.22 Nor is it affected by geographical location, so that a given type of dwelling has the same rating in all parts of the United Kingdom.

Table 2.13 Outputs from SAP assessment		
	<i>Private rented sector</i>	<i>Owner-occupied</i>
Average SAP rating (from 1-100)	56	55
Average CO ₂ emissions (tonnes of CO ₂ per year)	5.3	6.1

Source: London Private Sector Stock Condition Profile 2011

3. Geographical variations in the results

Introduction

- 3.1 This chapter presents greater detail on the condition of the private rented stock and how it varies by location within London. To do this the private rented sector is separated into three areas of London: Inner, Mid and Outer. The constituent Boroughs of these three areas are presented in the table below.

Table 3.1 Sample Boroughs within three sub-areas of London	
<i>Location</i>	<i>Councils</i>
Inner London	Islington; Kensington and Chelsea
Mid-London	Ealing
Outer London	Hillingdon

Source: London Private Sector Stock Condition Profile 2011

Empty homes

- 3.2 The levels of vacancy do not vary much with location, but the distribution of long term vacancies increases when moving from Inner to Outer London.

Table 3.2 Rate of vacancy amongst private rented dwellings			
<i>Length of vacancy</i>	<i>Inner</i>	<i>Mid</i>	<i>Outer</i>
Occupied	95.3%	95.1%	96.9%
Vacant	4.7%	4.9%	3.1%
Total	100.0%	100.0%	100.0%

Source: London Private Sector Stock Condition Profile 2011

Table 3.3 Length of vacancy of private rented dwellings			
<i>Length of vacancy</i>	<i>Inner</i>	<i>Mid</i>	<i>Outer</i>
Newly vacant (less than a month)	57.2%	23.6%	17.8%
Mid term vacant (1 to 6 months)	28.9%	58.1%	34.0%
Long term vacant (6 months or more)	13.8%	18.3%	48.2%
Second/holiday home	0.2%	0.0%	0.0%
All empty homes	100.0%	100.0%	100.0%

Source: London Private Sector Stock Condition Profile 2011

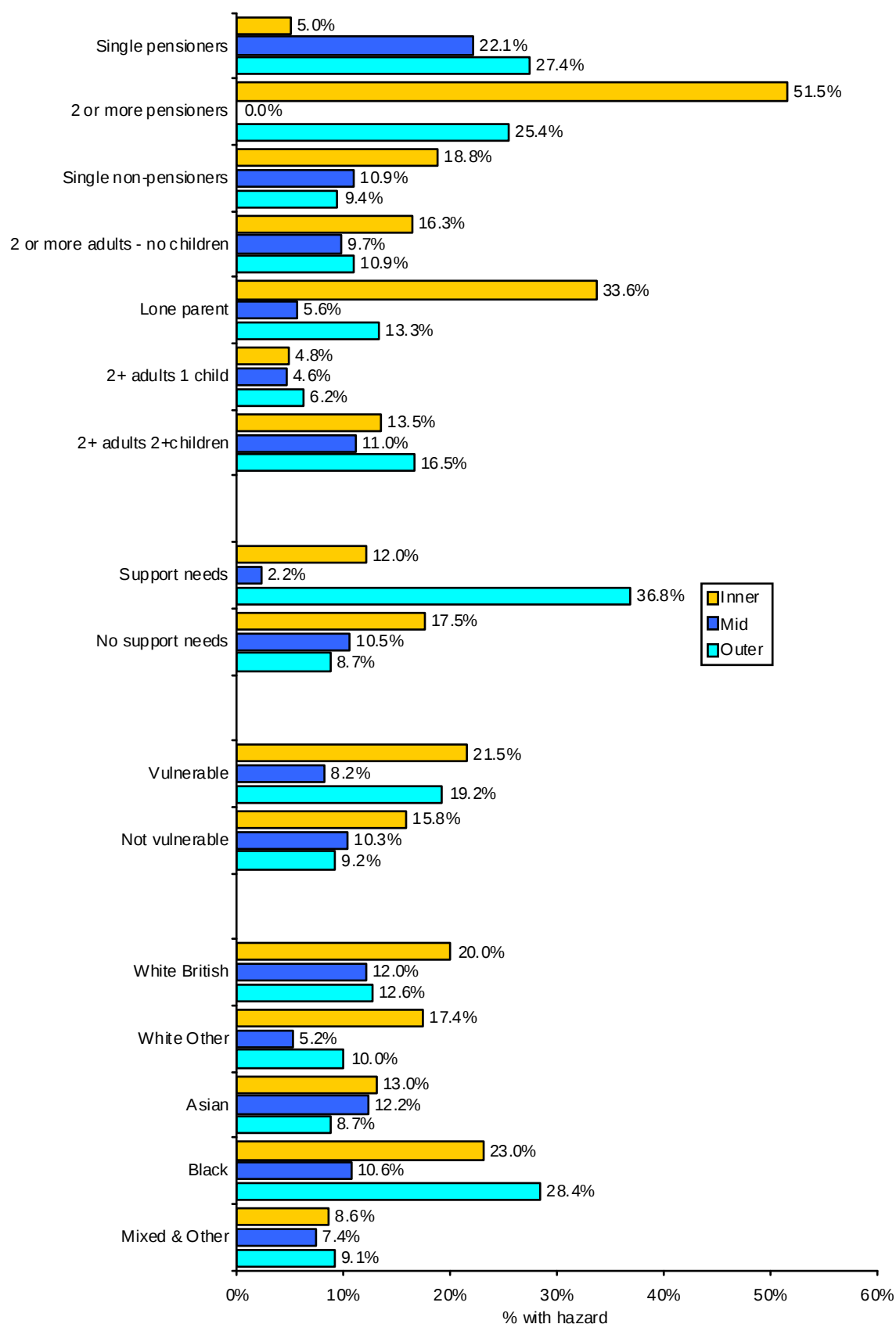
- 3.3 There are some striking differences in these statistics. Although the overall level vacancy is low across all of London, it is notable that the length of period for vacancy/void varies quite systematically: rising in Outer London. It is likely that this reflects the unattractiveness of some of the Outer London PRS, as levels of demand are generally high across London.

HHSRS

- 3.4 The proportion with Category 1 hazards is the highest in Inner London, as is the cost of remedying it.

Table 3.4 Grouped hazard scores of private rented dwellings			
Category of worst hazard	Inner	Mid	Outer
Category 1	17.9%	10.9%	12.8%
Category 2	28.2%	35.5%	23.0%
No hazards	53.9%	53.6%	64.2%
Total	100.0%	100.0%	100.0%
Average cost to remedy category 1 hazards	£4,305	£2,019	£2,695

Source: London Private Sector Stock Condition Profile 2011

Figure 3.1 Proportion of private rented households with Category 1 hazards

Source: London Private Sector Stock Condition Profile 2011

Table 3.5 Proportion of private rented dwellings with each type of category 1 hazard

<i>Hazard</i>	<i>Inner</i>	<i>Mid</i>	<i>Outer</i>
Falls on the level	0.4%	1.7%	1.2%
Falls on stairs	2.6%	1.8%	1.1%
Falls between levels	0.8%	0.0%	0.6%
Falls associated with baths	0.0%	0.0%	0.0%
Fire	1.8%	0.2%	1.1%
Hot surfaces & materials	0.0%	0.0%	0.0%
Damp & mould	0.2%	0.0%	0.0%
Noise	0.8%	0.4%	0.0%
Excess cold	12.5%	6.7%	9.5%
Entry by intruders	0.5%	0.0%	0.0%
Collision & entrapment	1.0%	0.0%	0.0%
Excess heat	0.0%	0.0%	0.0%
Asbestos	0.1%	0.0%	0.4%
Biocides	0.0%	0.0%	0.0%
Lead	0.0%	0.0%	0.0%
Radiation (radon)	0.0%	0.0%	0.0%
Uncombusted fuel gases	0.0%	0.0%	0.0%
Volatile organic compounds	0.0%	0.0%	0.0%
Crowding & space	0.2%	0.0%	0.0%
Carbon Monoxide	0.0%	0.0%	0.7%
Lighting	0.2%	0.0%	0.0%
Electrical hazards	0.5%	0.2%	0.4%
Domestic hygiene, pests & refuse	0.0%	0.0%	0.1%
Food safety	0.2%	0.0%	0.0%
Personal hygiene, sanitation & drainage	0.8%	1.0%	0.5%
Water supply	1.1%	0.3%	0.0%
Position & operability of amenities	0.4%	0.7%	0.0%
Structural failure	0.1%	0.0%	0.0%
Explosions	0.0%	0.0%	0.0%

Source: London Private Sector Stock Condition Profile 2011

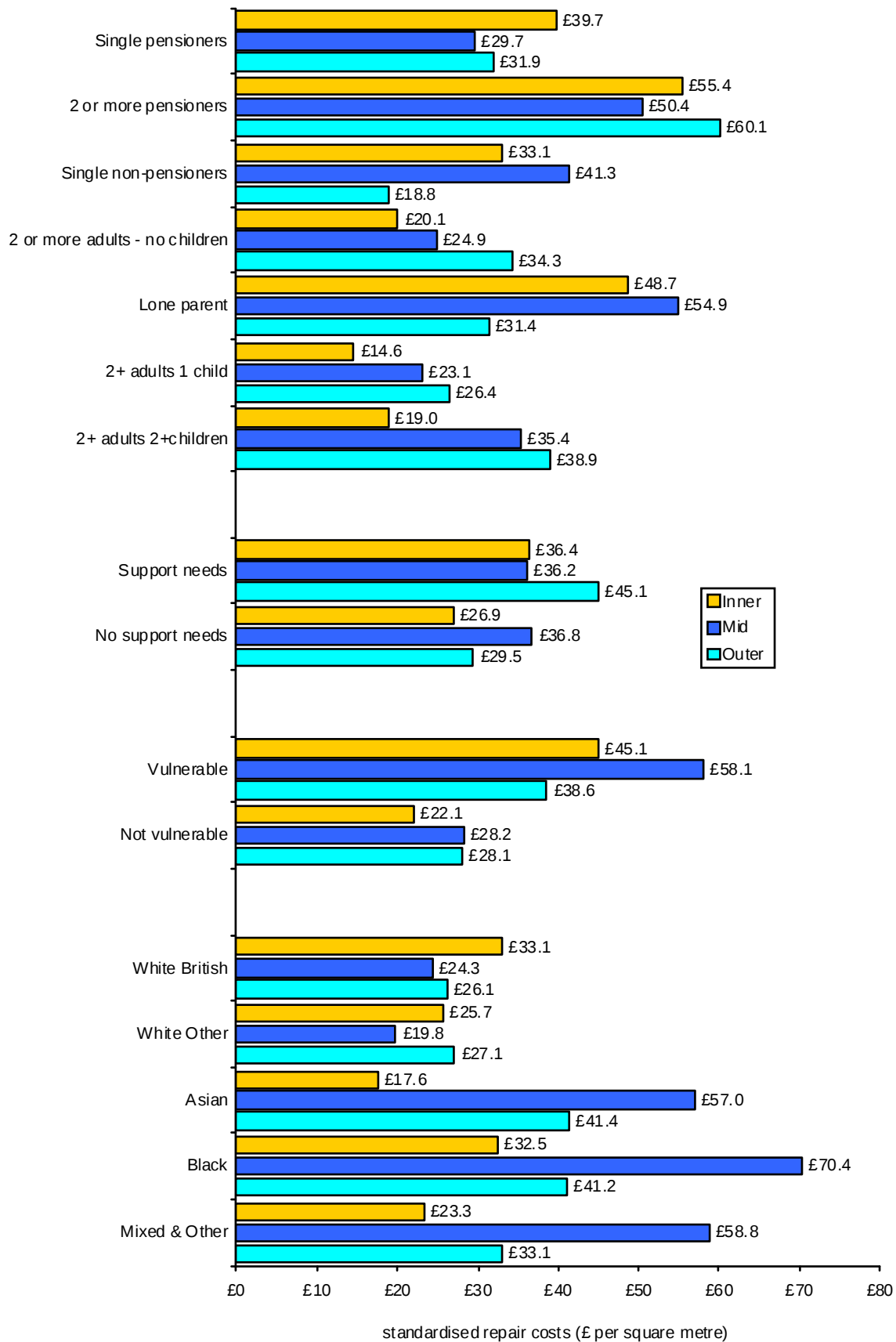
Disrepair

3.5 There is no strong geographical or household type variation in this measure.

Table 3.6 Overall repairs cost in private rented sector (Average cost per dwelling including those requiring no work)			
Repairs category	Inner	Mid	Outer
Urgent repair	£1,794	£2,656	£1,643
Basic repair	£2,198	£4,382	£2,373
Comprehensive repair	£3,488	£7,414	£5,567
Standardised repair cost (/m ²)	£35.4	£41.9	£31.5

Source: London Private Sector Stock Condition Profile 2011

Figure 3.2 Average standardised repair cost of private rented households



Source: London Private Sector Stock Condition Profile 2011

Decency

3.6 The costs to make decent are much higher in Inner than Outer London.

Table 3.7 Non-decent private rented homes

<i>Decency</i>	<i>Inner</i>	<i>Mid</i>	<i>Outer</i>
Decent	70.2%	63.3%	67.8%
Non-decent	29.8%	36.7%	32.2%
Total	100.0%	100.0%	100.0%

Source: London Private Sector Stock Condition Profile 2011

Table 3.8 Causes of non-decent homes in the private rented sector

<i>Non-decent due to</i>	<i>Inner</i>	<i>Mid</i>	<i>Outer</i>
Category 1 hazard	17.9%	10.9%	12.8%
Disrepair	9.9%	17.1%	8.1%
Modern facilities	3.2%	5.7%	4.1%
Thermal comfort	13.8%	21.6%	20.0%

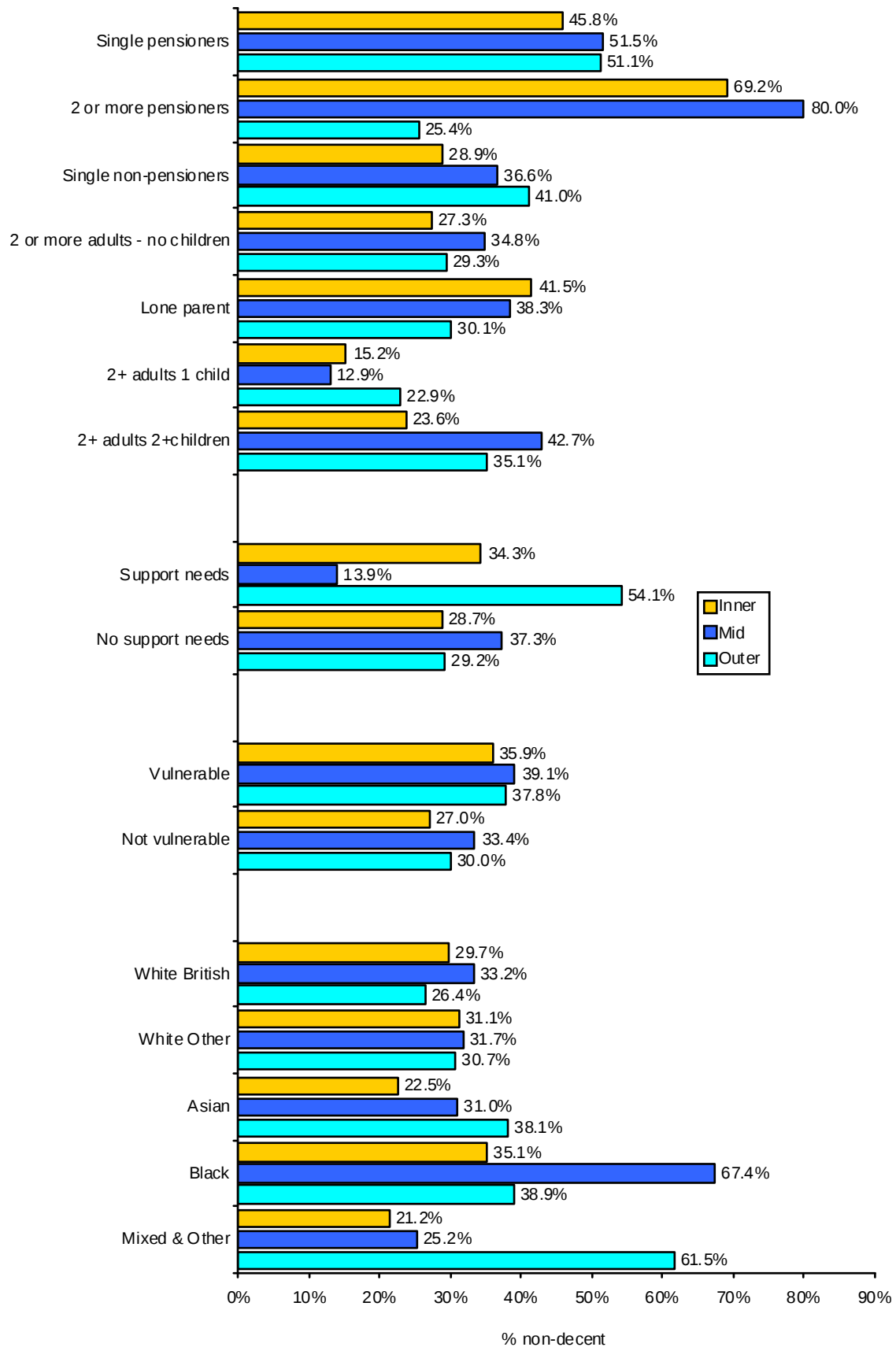
Source: London Private Sector Stock Condition Profile 2011

Table 3.9 Average Cost for remedying non-decent private rented homes
(average cost per non-decent dwelling)

<i>Non-decent due to</i>	<i>Inner</i>	<i>Mid</i>	<i>Outer</i>
Category 1 hazard	£4,305	£2,019	£2,695
Disrepair	£3,941	£2,451	£3,073
Modern facilities	£5,670	£8,420	£3,767
Thermal comfort	£3,005	£2,239	£1,893
Average/total	£5,884	£4,379	£3,498

Source: London Private Sector Stock Condition Profile 2011

Figure 3.3 Proportion of private rented households accommodation non-decent



Source: London Private Sector Stock Condition Profile 2011

- 3.7 When examining these detailed figures it is quite important to notice the difference between a Category 1 hazard and the Decency test. The Decency test requires no Category 1 hazards, but also three further tests (see para 2.18 above). Thus for example in Figure 3.1 'Mid' London shows that only 10.6% of Black households in the PRS suffer Category 1 hazards. But Figure 3.3 shows that 67.4% of Black PRS residents in Mid London are in non-decent accommodation. This is the effect of the other three tests producing a much worse result than for Category 1 alone.

Energy Efficiency

- 3.8 It is clear that the incidence of double glazing and cavity walls is much lower in Inner London.

Table 3.10 Extent of double glazing in private rented dwellings

	<i>Inner</i>	<i>Mid</i>	<i>Outer</i>
Full	37.7%	43.8%	70.1%
Some	8.2%	21.9%	13.8%
None	54.1%	34.3%	16.1%
Total	100.0%	100.0%	100.0%

Source: London Private Sector Stock Condition Profile 2011

Table 3.11 Extent of wall insulation in private rented dwellings

	<i>Inner</i>	<i>Mid</i>	<i>Outer</i>
Non-cavity walls	74.2%	60.7%	45.8%
Insulated cavity walls	7.2%	12.2%	13.4%
Uninsulated cavity walls	18.7%	27.1%	40.8%
Total	100.0%	100.0%	100.0%

Source: London Private Sector Stock Condition Profile 2011

Table 3.12 Extent of loft insulation in private rented dwellings

	<i>Inner</i>	<i>Mid</i>	<i>Outer</i>
Less than 100mm	12.2%	28.4%	27.5%
100mm or more	13.9%	26.1%	48.8%
No loft	73.9%	45.5%	23.7%
Total	100.0%	100.0%	100.0%

Source: London Private Sector Stock Condition Profile 2011

Table 3.13 Main heating system in private rented dwellings

	<i>Inner</i>	<i>Mid</i>	<i>Outer</i>
Boiler with radiators	73.6%	83.9%	76.6%
Electric storage heaters	5.6%	8.5%	13.9%
Room heaters	7.7%	6.6%	6.7%
Other system	13.1%	1.0%	2.8%
Total	100.0%	100.0%	100.0%

Source: London Private Sector Stock Condition Profile 2011

Table 3.14 Fuel used for main heating system in private rented dwellings

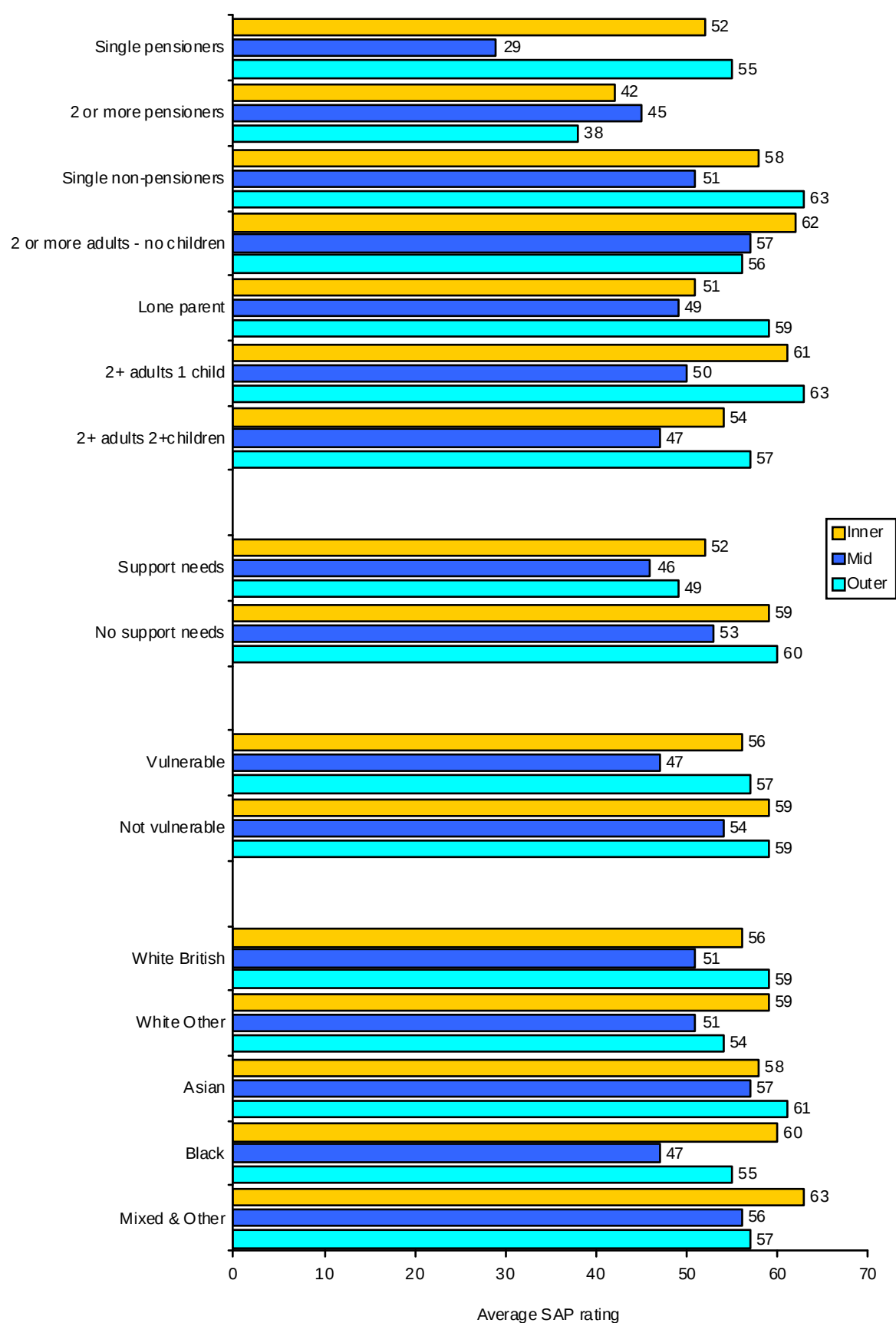
	<i>Inner</i>	<i>Mid</i>	<i>Outer</i>
Gas	87.2%	82.3%	79.4%
On-peak electric	9.3%	7.9%	6.0%
Off-peak electric	3.0%	7.3%	14.0%
Solid fuel	0.1%	1.8%	0.6%
Oil	0.4%	0.6%	0.0%
Total	100.0%	100.0%	100.0%

Source: London Private Sector Stock Condition Profile 2011

Table 2.12 Outputs from SAP assessment in private rented dwellings

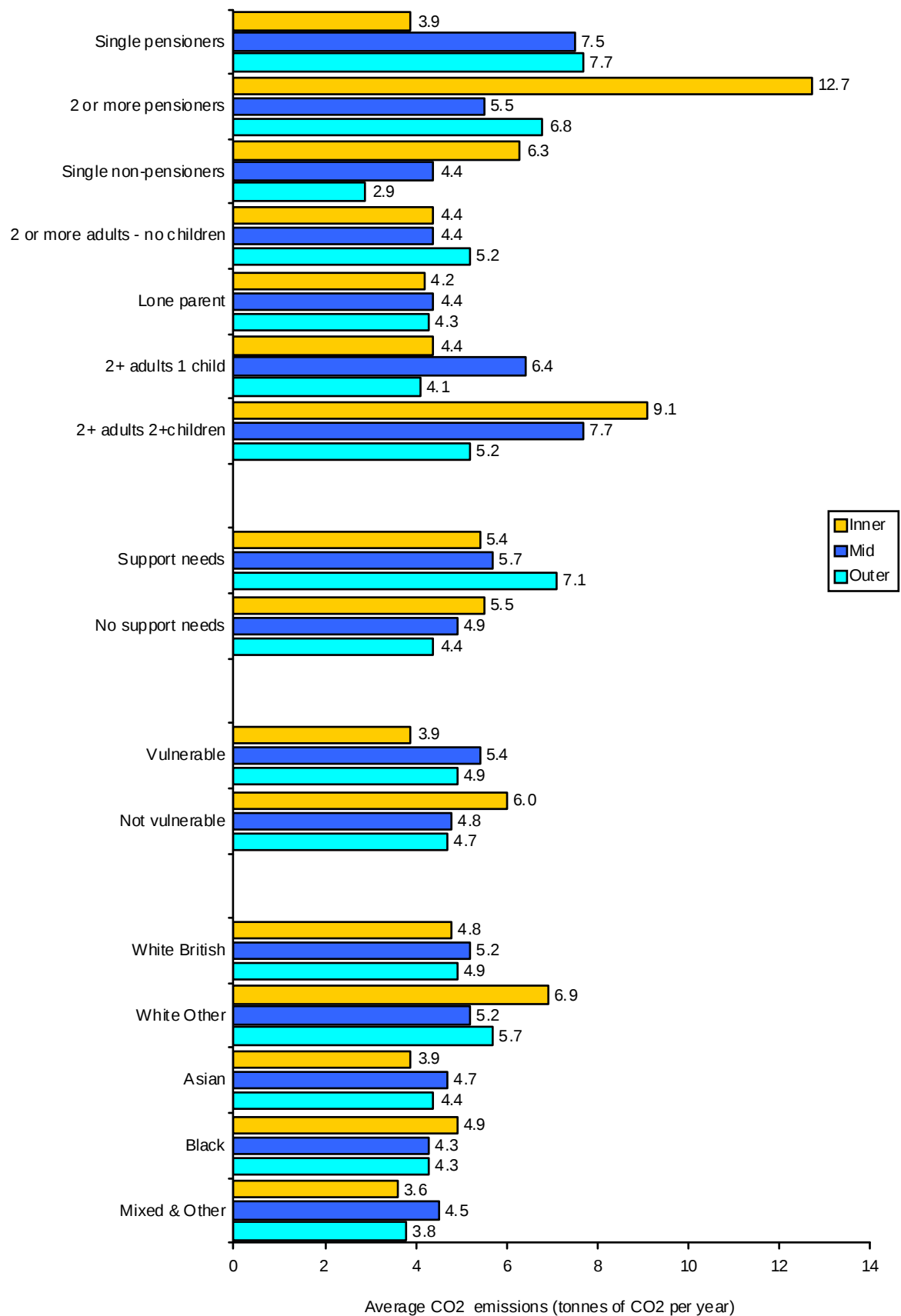
	<i>Inner</i>	<i>Mid</i>	<i>Outer</i>
Average SAP rating (from 1-100)	58	51	58
Average CO ₂ emissions (tonnes of CO ₂ per year)	5.5	5.0	5.3

Source: London Private Sector Stock Condition Profile 2011

Figure 3.4 Average SAP rating of private rented households

Source: London Private Sector Stock Condition Profile 2011

Figure 3.5 Average CO₂ emissions of private rented households



Source: London Private Sector Stock Condition Profile 2011