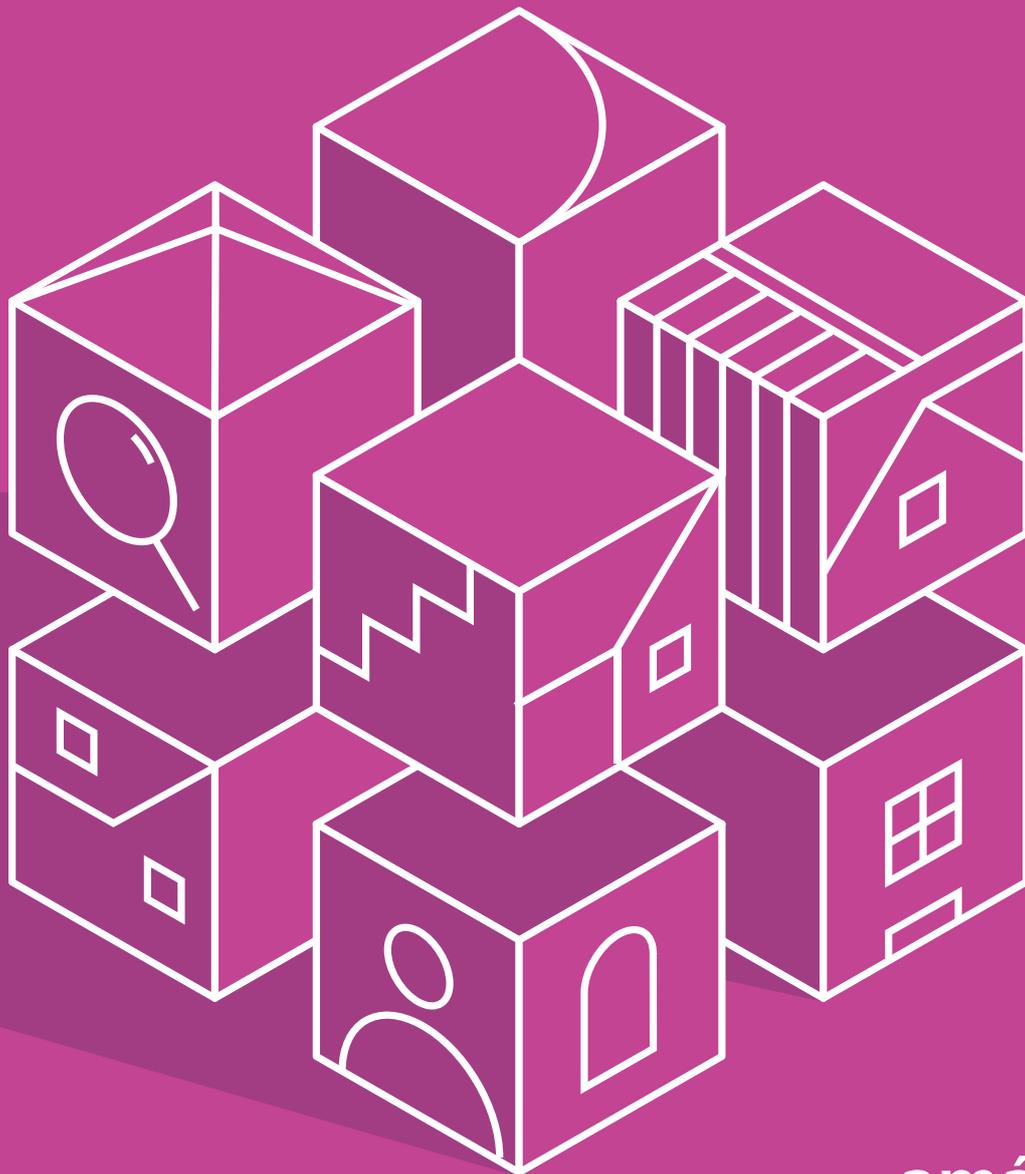




Bord um Thionóntachtaí Cónaithe
Residential Tenancies Board

Tenants Research Report

July 2021



amárach 
research

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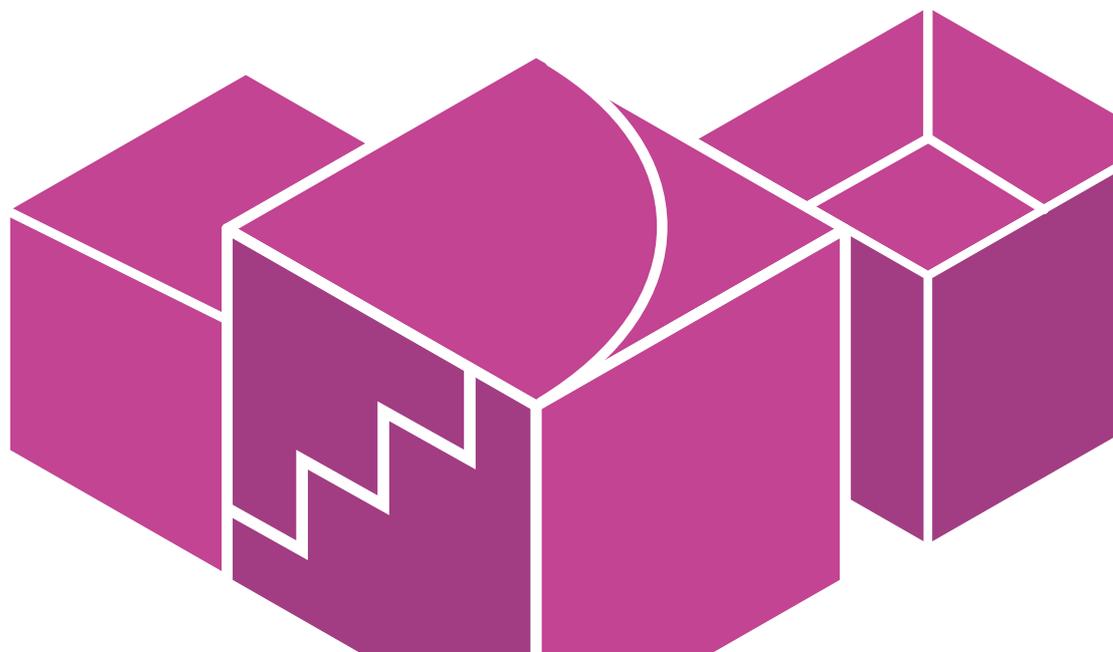
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Abbreviations and Glossary

AHB	Approved Housing Body (AHB)	Also called housing associations or voluntary housing associations, they are independent, not-for-profit organisations. They provide affordable rented housing for people who cannot afford to pay private sector rents or buy their own homes; or for particular groups, such as older people, or homeless people.	
HAP	Housing Assistance Payment (HAP)	The Housing Assistance Payment (HAP) is a form of social housing support for people who have a long-term housing need. HAP will eventually replace long-term Rent Supplement. The scheme is administered by the local authorities, who pay landlords directly.	
LA	Local Authority (LA)	Local authorities are responsible for public services and facilities in a particular area. They provide affordable rented housing for people who cannot afford to pay private sector rents or buy their own homes; or for particular groups, such as older people, or homeless people.	
	Pobal HP Deprivation Index (SA) Trutz Haase	A measure of the affluence or deprivation of each small area on a single scale.	
	Purpose-built Apartment	CSO definitions (Census 2016)	
RAS	Rental Accommodation Scheme (RAS)	RAS is a social housing support introduced to cater for the accommodation needs of persons who are in receipt of long-term rent supplement. Under the RAS scheme, private rented properties provide an additional source of good quality rental accommodation for eligible persons.	
	Social Class/Socio-economic groupings	AB	Higher and intermediate managerial, administrative, professional occupations
		C1	Supervisory, clerical and junior managerial, administrative, professional occupations
		C2	Skilled manual occupations
		DE	Semi-skilled and unskilled manual occupations, unemployed and lowest grade occupations

Foreword

The Residential Tenancies Board (RTB) was established under the Residential Tenancies Act 2004, to support and develop a well-functioning rental housing sector. The functions of the RTB are to: maintain a register of private tenancies, Approved Housing Body tenancies, and Student Specific Accommodation tenancies; to provide a dispute resolution service for tenants and landlords; to undertake research into the private rented sector; investigate and sanction improper conduct; and, to provide policy advice on the private rented sector to the Government. Since the enactment of the Private Residential Tenancies Act 2004, the legislative code, along with the sector, has matured and expanded.

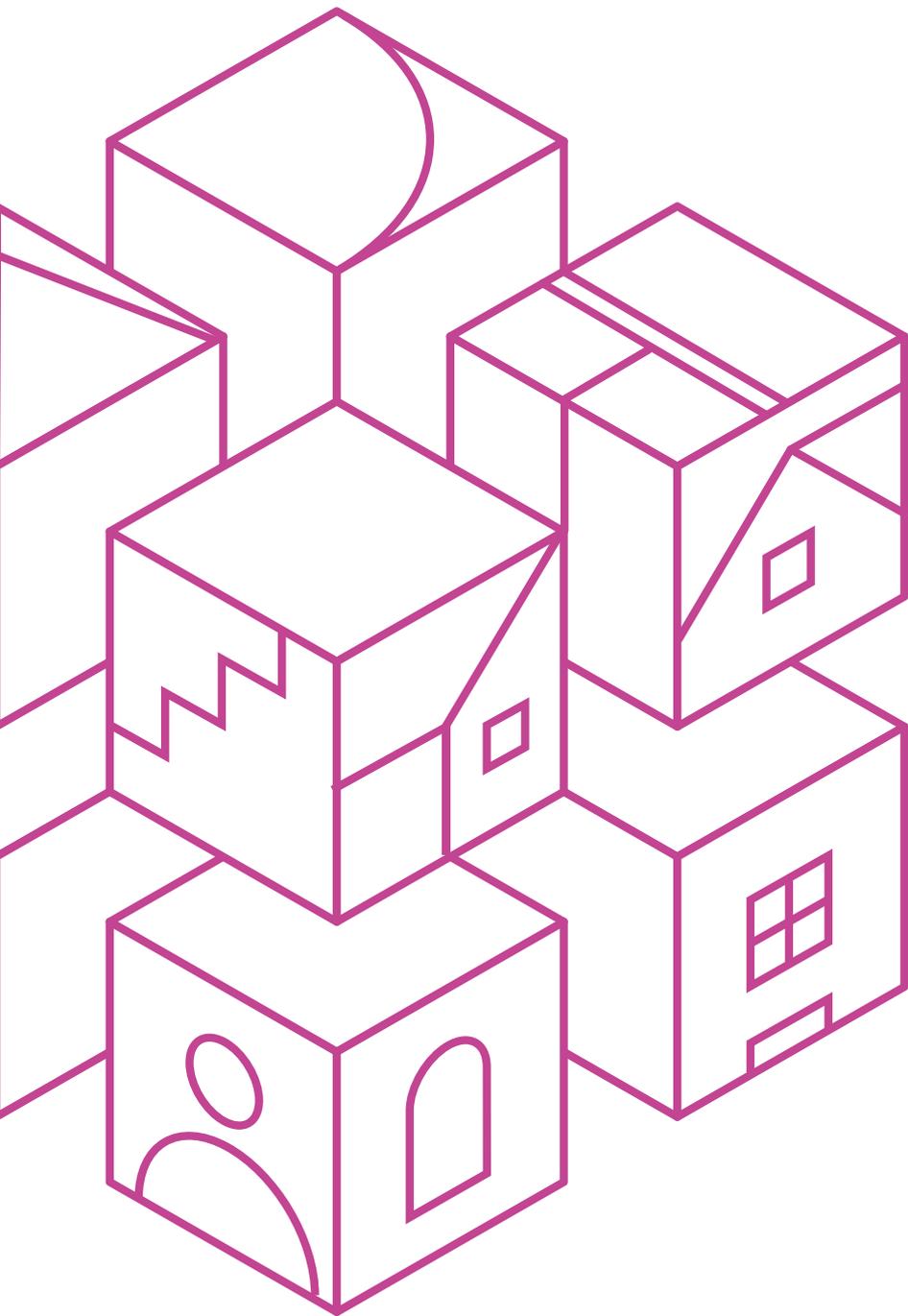
In 1991, only 8.6% of households in the country lived in private rented accommodation. At the end of 2020 there were 297,837 private tenancies registered with the RTB, representing nearly one in five households in Ireland. However, one thing that does not appear to have changed is the underlying preference among the Irish population for home ownership. This research shows that the majority of tenants do not plan on renting in the long term, with 75% indicating that they do not see themselves living in the rented sector in ten years' time. The majority (51%) see themselves as being owner occupiers by that time.

The challenge facing policy makers when it comes to the private rented sector is how to address differing and often competing interests, not just between landlords and tenants but also between distinct groups within the tenant population. For some renting is simply a stage on the pathway towards home ownership or obtaining a long-term social tenancy. For others who are reluctant renters, their circumstances are bounded by the inability to secure their preferred form of tenure for economic or other reasons. And finally, there are those who are happy to remain for the medium to the long term as renters.

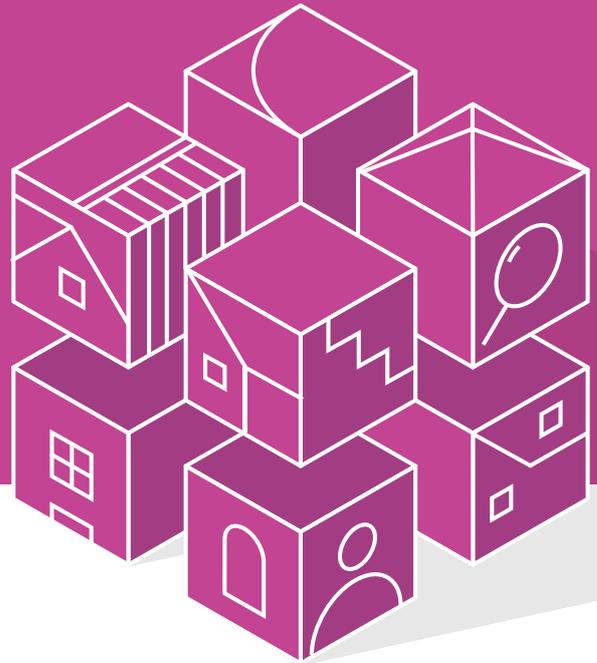
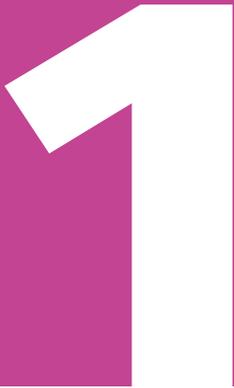
This current piece of research provides clear insights from tenants on how the sector is working for them and what their intentions and aspirations are for the future. The main aims of the research are to identify changes in the profile of renters, to highlight the issues that make renting challenging for different cohorts of tenants and to provide an evidence base to assist policy makers in creating a private rented sector that provides tenants with affordable and secure accommodation for as long as they require it.

Padraig McGoldrick

Interim Director of the Residential Tenancies Board



Introduction



1.1 Introduction

The Tenants, Landlord and Letting Agent 2019/2020 research study was commissioned by the Residential Tenancies Board (RTB). It is one of the largest studies of the rental sector ever conducted in Ireland.

This study is a central pillar of the RTB research programme, the overall aim of which is to create evidence-based reporting on important issues in the sector.

The purpose of the research project is to provide up-to-date and robust information on the landlords, tenants and letting agents in the rental sector. The research project is part of a strategic priority for the RTB to use data and research to promote a better understanding of the rental sector, monitor trends, assess their impact and influence policy and outcomes.

1.2 Research Objectives

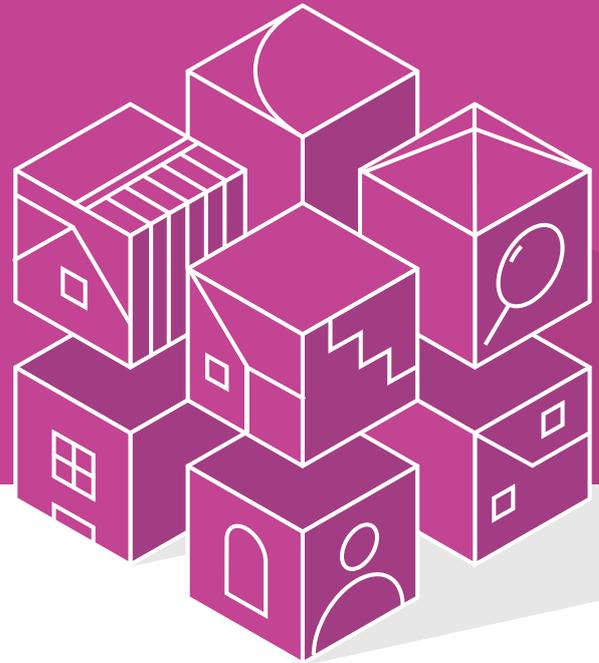
More specific objectives of the research are to:

- ▶ help create an accurate profile of landlords, tenants and letting agents in the private rental sector;
- ▶ establish an evidence base of data around the actions and intentions of private landlords and tenants across a range of thematic areas;
- ▶ collect information that will facilitate the monitoring of sectoral trends over time; and
- ▶ gain insights into the drivers of behaviour of key stakeholders within the sector.

1.3 Report Structure

This report presents findings from the private tenant research.

Private Tenant Research



2.1 Research Methodology

The private tenant research employed a mixed mode methodology, using qualitative and quantitative methods.

The quantitative element consisted of a nationally representative face-to-face survey of tenants living in accommodation that is privately rented in Ireland. The fieldwork took place from September 2019 to March 2020.

The quantitative research was strengthened by qualitative research.

The qualitative element consisted of five thematic focus groups including one exploratory focus group. The four main focus groups were undertaken by Zoom video-conferencing service in December 2020.

2.2 Sampling Approach

For the nationally representative survey of tenants, the sampling approach taken was a non-probability quota-based methodology, similar to many large-scale national surveys. The sample was representative of the Irish population aged 19+ living in accommodation in the private rental sector¹. To achieve this, quotas were set on age and gender to align with the Central Statistic Office's Census 2016.

Sampling points were spread geographically to represent the distribution of private tenancies in the Republic of Ireland². Within Dublin, sampling points were spread to represent the four local authorities – Dublin City, Dun Laoghaire-Rathdown, Fingal and South Dublin.

1 We were guided by CSO census age bands for adults by tenure type which start from 19-24 years old.

2 As registered with the RTB in July 2019.

The Pobal HP Deprivation Index³ was used to calculate the spread of sampling points regionally. The HP deprivation index measures the relative social advantage (or disadvantage) of each small area in Ireland. It is the main index used in Ireland and applied by several government departments, state and semi-state agencies, voluntary and non-governmental organisations. The index is a more robust method for classifying areas based on socio-economic variables. Using this method ensured that the surveying captured a representative socio-economic profile across a range of area types – from very disadvantaged to very affluent. Socio-economic group data was also collected as per standard procedure (AB, C1, C2, DE).

2.2.1 Sample Achieved

Fieldwork for the tenant survey was carried out between 27th September 2019 and 17th March 2020.

The quantitative research achieved a sample of 1,038⁴ face-to-face surveys across 130 sampling points. An average of 8 effective surveys with appropriate participants was achieved per sampling point. The margin of error was 2.94% at a 95% confidence interval (Table 2.1).

Table 2.1: Overview of sample

Sample Size	Sampling Points	Completed Surveys Per Sampling Point	Margin of error
1,038	130	8	2.94%

The sample achieved was large enough to provide findings at a regional level (e.g. Dublin vs outside Dublin).

While all efforts were made to achieve a wholly representative survey sample (using quota controls), some variables are weighted to proportionately represent the population of those living in the private rental sector. An overview of the full weighted sample profile is set out below in Table 2.2.

3 See <https://www.pobal.ie/app/uploads/2018/06/The-2016-Pobal-HP-Deprivation-Index-Introduction-07.pdf>

4 The target sample was 1,200 surveys but fieldwork was cut short due to Covid-19.

Table 2.2: Weighted Sample Profile

	(N=1038) ⁵
Age	
Young adults 19-24 years	13%
Persons aged 25-34 years	43%
Persons aged 35-44 years	27%
Persons aged 45-54 years	10%
Persons aged 55-64	6%
Persons aged 65+	1%
Gender	
Male	50%
Female	50%
Region	
Dublin	39%
Leinster (excluding Dublin)	21%
Munster	25%
Connacht and Ulster	15%
Local Authority Area (Dublin only)	
Dublin City	23%
Dún Laoghaire-Rathdown	5%
Fingal	6%
South Dublin	5%

2.3 Survey Instrument

The main survey instrument for the tenant survey was designed by Amárach with input from the RTB Research team and project steering group. The questionnaire was then scripted for data collection on CAPI (Computer Assisted Personal Interviewing) devices using the international industry standard software NIPO.

2.4 Pilot Study

A pilot study of 40 face-to-face surveys was undertaken using CAPI across five sampling points nationally in August 2019. This served to highlight any potential issues that could affect data quality and fieldwork efficiencies. Findings from the pilot study were used to improve the questionnaire script and to inform the main stage interviewer briefings. The 40 pilot surveys were subsequently included in the total sample to be reported on (1,038).

⁵ Due to weighting of data to reflect CSO figures, some base sizes may vary by +/- 1.

2.5 Context

While home ownership remains the foremost tenure of choice among Irish households, there has been a substantial shift to private renting in recent years. From around 8% in the early 1990s, Ireland's Private Rented Sector (PRS) has grown to account for approximately one in every five households nationally. In Dublin, that proportion is even greater with roughly one-in-four households in the capital now renting privately.⁶

Given this shift in tenure, there is clearly a need for analysts, policy makers and market participants to better comprehend Ireland's PRS. Recent inroads have been made in this regard. McCartney (2016) has helped redress empirical deficits with respect to timely analysis on tenure trends. Corrigan et al., (2019) find that households renting privately in Dublin and surrounding regions, and those on low incomes, face the greatest financial burden. O'Toole et al., (2019) observe that price inflation in Rent Pressure Zones (RPZs) has fallen relative to other areas in response to policy changes introduced at the tail-end of 2016.⁷ Earlier surveys have also been carried out by DKM⁸ (in 2014 - on behalf of the RTB) and the Housing Agency⁹ (2019).

This report attempts to build on these works by looking at Ireland's PRS through the eyes of the tenant. The aim of this research is to bring private renters' experiences to the fore with the view to, among other things, inform policy. Themes explored include reasons for renting, housing affordability, accommodation standards and relationships with landlords. To generate insight, a detailed review of the existing literature was undertaken to support a series of focus groups and a large-scale tenant survey.

2.6 Nationally Representative Results

This section of the report presents the findings from the nationally representative face-to-face survey of private tenants. The results are presented under the following headings:

- ▶ Profile of tenants and rental property
- ▶ Renting experience
- ▶ Motivations for renting and future intentions
- ▶ Awareness of rights and responsibilities
- ▶ Property inspections and maintenance requests
- ▶ The experience of non-Irish citizens
- ▶ The experience of older renters aged 45+

Due to rounding, some tables may add to less or more than 100%

6 Estimates for tenure shares derived from 1991 Census and Q1 2019 CSO *Labour Force Survey* data.

7 A Rent Pressure Zone (RPZ) is a designated area where, in general, rents cannot be increased by more than 4% per annum. For further details see <https://onestopshop.rtb.ie/rent-pressure-zones/>

8 See https://www.rtb.ie/images/uploads/general/DKM_Future-of-the-private-rented-sector.pdf

9 See <https://www.housingagency.ie/sites/default/files/2020-09/Apartment%20Living%20Attitudinal%20Report%202019.pdf>

2.7 Profile of Tenants and Rental Property

2.7.1 Gender

The sample was representative of the Irish population aged 19+ living in accommodation in the private rental sector. The gender profile of tenants was pre-determined as quotas were set on gender, age and region to align with the Central Statistic Office's Census 2016.

Table 2.3 below shows the profile of the total sample by gender. The sample is broken down by age, socio-economic group, citizenship, region, whether they are living in a rent pressure zone and the length of time that they have been renting.

In line with the quota, 50% (523) of private tenants were male and 50% (515) were female. Those renting for less than one year were more likely to be male (58% (114)), whereas long-term renters (5+ years) were more likely to be female (57% (235)).

Table 2.3: Gender (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Male	50%	56%	51%	44%	54%	57%	47%	68%	37%	48%	55%
Female	50%	44%	49%	56%	46%	43%	53%	32%	63%	52%	45%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Male	50%	51%	48%	50%	51%	50%	52%	58%	54%	43%
Female	50%	49%	52%	50%	49%	50%	48%	42%	46%	57%

Q4Gender

2.7.2 Age

The age profile of tenants was pre-determined as a quota was set on age to align with the national profile of those aged 19+ living in accommodation in the private rental sector (CSO Census 2016).

In total 70% (724) of tenants surveyed were aged between 25 and 44. Young adults aged 19-24 represented 13% (137) of the total and 17% (176) were aged 45 years or older (Table 2.4).

The largest single category was aged 25-34, accounting for 43% (443) of all private tenants surveyed.

Table 2.4: Age (n=1,038)

	Total (1038)	Social Class				Citizenship	
		AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
19-24	13%	5%	25%	10%	9%	15%	10%
25-34	43%	49%	41%	47%	38%	42%	44%
35-44	27%	33%	25%	27%	27%	24%	32%
45-54	10%	9%	6%	11%	15%	11%	10%
55-64	6%	3%	2%	6%	8%	7%	4%
65+	1%	0	1%	0	3%	2%	*

	Total (1038)	Region			RPZ		Renting in Total			
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1 yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
19-24	13%	14%	12%	13%	13%	14%	12%	23%	16%	6%
25-34	43%	43%	40%	43%	43%	43%	43%	52%	45%	36%
35-44	27%	26%	26%	28%	28%	27%	27%	18%	24%	35%
45-54	10%	10%	13%	10%	10%	11%	10%	4%	11%	13%
55-64	6%	5%	6%	6%	6%	6%	6%	3%	4%	8%
65+	1%	1%	2%	1%	1%	1%	1%	1%	*	2%

Q5a/b Age

2.7.3 Socio-economic group

The Pobal HP Deprivation Index was used to ensure that the survey captured a representative socio-economic profile across a range of area types – from very disadvantaged to very affluent. Socio-economic group (AB, C1, C2, DE) data was also collected.

Table 2.5 below shows that the largest single socio-economic group was DE (semi-skilled and unskilled manual occupations, unemployed), accounting for 34% (348) of responses, followed by C1 (supervisory, clerical and junior managerial, administrative, professional occupations) at 28% (289) and C2 (skilled manual occupations) at 27% (276). The smallest single category was AB (higher and intermediate managerial, administrative, professional occupations) at 12% (125).

The majority (60% (624)) of tenants were in socio-economic group C2DE. Nearly nine in ten (88% (177)) of all those in receipt of any rental assistance were in socio-economic group C2DE.

Table 2.5: Socio-economic group (n=1,038)

	Total (1038)	Age				Citizenship		Rental Assistance
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	Irish Citizen (640)	Non-Irish Citizen (393)	Any (202)
AB	12%	5%	14%	14%	9%	12%	12%	4%
C1	28%	53%	27%	26%	14%	29%	27%	8%
C2	27%	19%	29%	26%	27%	26%	28%	11%
DE	34%	23%	30%	33%	50%	34%	33%	77%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non-GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
AB	12%	20%	3%	8%	7%	14%	6%	10%	14%	11%
C1	28%	32%	28%	25%	25%	31%	19%	46%	32%	15%
C2	27%	27%	37%	24%	26%	27%	26%	17%	28%	30%
DE	34%	21%	31%	44%	42%	27%	49%	27%	26%	44%

C8 Socioeconomic group

2.7.4 Employment Status

Respondents were asked to describe their current employment status.

The majority (56% (585)) of tenants indicated that they were working full-time when the survey took place. A further 10% (103) were part-time employed and 11% (110) were looking after the family home.

In total 8% (80) of tenants indicated that they were currently enrolled in third level education. Within the 19-24 age range, this increased to 31% (42) of respondents (Table 2.6).

Table 2.6: Employment Status (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Full-time employed	56%	43%	63%	57%	49%	90%	58%	85%	20%	56%	57%
Part-time employed	10%	13%	10%	10%	8%	2%	9%	7%	16%	10%	10%
Self-employed or working family business	2%	1%	2%	4%	3%	3%	1%	5%	1%	3%	2%
Unemployed in receipt of social or community welfare benefit	6%	4%	6%	6%	6%	0	0	0	17%	7%	5%
Third level education (incl. vocational training or retraining)	8%	31%	6%	3%	1%	1%	26%	1%	*	7%	10%
Unable to work-sickness or disability	4%	2%	2%	3%	15%	0	0	1%	12%	5%	3%
Retired	2%	0	0	0	9%	0	1%	0	4%	2%	1%
Looking after family home	11%	4%	11%	15%	8%	4%	2%	1%	28%	10%	13%
Prefer not to say	1%	3%	*	2%	1%	0	2%	*	2%	1%	2%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non- Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Full-time employed	56%	65%	61%	51%	49%	62%	43%	51%	62%	53%
Part-time employed	10%	5%	6%	13%	15%	8%	15%	12%	8%	11%
Self-employed or working family business	2%	2%	1%	3%	3%	2%	4%	4%	3%	1%
Unemployed in receipt of social or community welfare benefit	6%	5%	13%	7%	5%	5%	9%	5%	7%	6%
Third level education (incl.vocational training or retraining)	8%	10%	4%	6%	7%	9%	5%	19%	7%	3%
Unable to work - sickness or disability	4%	4%	5%	5%	5%	3%	7%	2%	3%	7%
Retired	2%	2%	1%	1%	1%	2%	1%	0	1%	3%
Looking after family home	11%	6%	9%	14%	15%	9%	15%	7%	8%	16%
Prefer not to say	1%	2%	0	1%	1%	1%	2%	1%	1%	2%

Q6 How would you describe your current employment status?

2.7.5 Marital Status

The marital status of respondents is set out in Table 2.7 below. More than one in two (56% (579)) tenants were married or cohabiting and 31% (323) were single adults. In total 8% (86) of tenants indicated that they were divorced/widowed/separated.

The results indicate that non-Irish citizens were more likely to be married than Irish citizens (51% (199) vs 24% (151)).

Table 2.7: Marital Status (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Married or Civil partnership	34%	4%	33%	44%	46%	36%	24%	40%	37%	24%	51%
Cohabiting	22%	28%	26%	20%	8%	26%	17%	32%	16%	27%	13%
Single - never married	31%	66%	34%	19%	15%	22%	44%	22%	31%	34%	27%
Divorced	3%	0	1%	4%	8%	1%	4%	*	3%	2%	3%
Widowed	2%	0	0	2%	7%	0	1%	*	4%	2%	1%
Separated	4%	0	2%	6%	11%	5%	4%	3%	5%	6%	1%
Prefer not to say	5%	3%	5%	6%	6%	11%	7%	2%	4%	5%	4%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Married or Civil partnership	34%	29%	35%	37%	38%	34%	35%	20%	38%	37%
Cohabiting	22%	21%	32%	22%	20%	21%	23%	27%	24%	17%
Single - never married	31%	34%	20%	29%	31%	32%	29%	43%	27%	29%
Divorced	3%	1%	8%	3%	3%	2%	3%	3%	1%	4%
Widowed	2%	1%	2%	2%	2%	1%	2%	*	1%	2%
Separated	4%	3%	3%	5%	5%	3%	6%	3%	2%	7%
Prefer not to say	5%	10%	0	1%	2%	6%	2%	3%	7%	4%

Q10 What is your marital status?

2.7.6 Ethnic Origin

As part of this research, tenants were also asked to self-identify their ethnicity from a list of options. The results indicated that 59% (610) of tenants surveyed identified themselves as 'white Irish'. The second biggest ethnic cohort was 'any other white background' (23% (242)), followed by 'Asian or Asian Irish or Chinese or other Asian background' (10% (103)).

Table 2.8 below sets out the ethnic origin of respondents broken down by age, socio-economic group, citizenship, region, whether they are living in a rent pressure zone and the length of time that they have been renting.

Table 2.8: Q71 Ethnic Origin (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non- Irish Citizen (393)
White Irish	59%	69%	57%	51%	67%	55%	59%	60%	59%	92%	5%
White Irish Traveller	1%	1%	*	2%	0	0	1%	1%	1%	1%	*
Any other white background	23%	14%	22%	29%	25%	23%	17%	27%	25%	2%	58%
Black or Black Irish or African	3%	2%	5%	2%	2%	1%	3%	2%	5%	0	8%
Black or Black Irish - Any other Black background	*	1%	*	0	1%	0	*	0	1%	*	1%
Asian or Asian Irish or Chinese	4%	4%	5%	5%	2%	10%	5%	2%	4%	2%	8%
Asian or Asian Irish - Any other Asian Background	6%	7%	6%	6%	2%	7%	11%	4%	2%	1%	13%
Other, including mixed background	3%	3%	2%	4%	1%	1%	4%	2%	2%	1%	6%
Refused	1%	0	2%	1%	*	4%	1%	1%	1%	1%	1%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
White Irish	59%	56%	64%	60%	60%	57%	64%	52%	56%	65%
White Irish Traveller	1%	*	0	1%	1%	1%	1%	*	*	1%
Any other white background	23%	22%	23%	24%	24%	23%	25%	25%	22%	24%
Black or Black Irish or African	3%	2%	5%	4%	4%	3%	5%	3%	4%	3%
Black or Black Irish - Any other Black background	*	*	0	*	*	*	*	0	1%	0
Asian or Asian Irish or Chinese	4%	7%	4%	3%	3%	5%	3%	7%	6%	2%
Asian or Asian Irish - Any other Asian Background	6%	8%	1%	4%	5%	7%	1%	8%	8%	2%
Other, including mixed background	3%	3%	3%	2%	2%	3%	2%	4%	3%	2%
Refused	1%	2%	0	1%	1%	2%	0	1%	1%	1%

Q71 Do you mind if I ask about your ethnicity? Are you...

2.7.7 Place of Birth

The majority of tenants surveyed indicated that they were born in the 'Republic of Ireland' (57% (594)), with a further 21% (216) indicating that they were born 'inside the EU' and a slightly lower proportion (18% (192)) indicating that they were born in the 'rest of the world'. Tenants born in the 'United Kingdom' represented 3% (31) of respondents (Table 2.9).

Long-term renters (5+ yrs) were more likely (64% (267)) to be born in the 'Republic of Ireland'.

Short-term renters (less than 1 yr) were more likely (24% (47)) to be born in the 'rest of the world'.

Table 2.9: Q72 Place of Birth (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Republic of Ireland	57%	66%	56%	51%	64%	53%	58%	58%	58%	93%	*
Inside the EU	21%	14%	18%	29%	20%	16%	14%	30%	21%	2%	52%
Rest of the world	18%	18%	22%	17%	10%	22%	25%	11%	17%	4%	42%
United Kingdom	3%	2%	3%	2%	5%	7%	2%	1%	3%	1%	5%
Refused (DNRO)	1%	0	1%	*	*	1%	*	0	1%	*	0

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1 yr (197)	Renting 1-4 yrs (427)	Renting 5+ yrs (414)
Republic of Ireland	57%	56%	58%	58%	58%	56%	61%	50%	53%	64%
Inside the EU	21%	19%	25%	22%	21%	19%	24%	23%	20%	21%
Rest of the world	18%	21%	14%	17%	18%	21%	12%	24%	22%	12%
United Kingdom	3%	4%	2%	2%	2%	3%	3%	2%	3%	3%
Refused (DNRO)	1%	1%	0	1%	1%	1%	0	1%	1%	*

Q72 What is your place of birth?

2.7.8 Citizenship

Irish citizens accounted for 62% (640) of all tenants surveyed, followed by EU citizens at 20% (210) and citizens of the 'rest of the world' at 17% (175). Citizens of the United Kingdom (2% (24)) represented the smallest share. A small number (11) of respondents had dual citizenship so multi-coding was allowed at this question.

More than half (52% (206)) of all non-Irish citizens were EU citizens, 43% (167) were 'rest of the world citizens' and 6% (23) were UK citizens.

Table 2.10: Q73 Citizenship (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Republic of Ireland	62%	71%	60%	55%	69%	60%	63%	61%	62%	100%	0
Inside the EU	20%	13%	18%	29%	19%	15%	13%	30%	21%	1%	52%
Rest of the world	17%	15%	22%	15%	8%	17%	24%	11%	16%	1%	43%
United Kingdom	2%	2%	2%	2%	4%	6%	2%	1%	2%	*	6%
Refused (DNRO)	1%	0	1%	*	*	2%	*	0	1%	0	0

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1 yr (197)	Renting 1-4 yrs (427)	Renting 5+ yrs (414)
Republic of Ireland	62%	59%	65%	63%	63%	61%	64%	53%	59%	68%
Inside the EU	20%	18%	25%	22%	21%	19%	24%	22%	20%	20%
Rest of the world	17%	20%	11%	15%	16%	19%	12%	23%	20%	10%
United Kingdom	2%	3%	1%	2%	2%	2%	2%	2%	2%	2%
Refused (DNRO)	1%	1%	0	*	*	1%	0	1%	1%	*

Q73 Where do you have citizenship?

2.7.9 Dwelling Type

The research showed that at a national level, semi-detached was the most common dwelling type with 40% (410) of tenants residing in a semi-detached house. This was followed by a terraced house (25% (259)) and an apartment in a purpose-built development (22% (224)).

It can also be seen from Table 2.11 below that in Dublin, the highest proportion of all tenancies was 'an apartment in a purpose-built development' (35% (141)), whereas non-purpose-built apartments accounted for 9% (37) of all rented dwellings. Outside of the capital 'a semi-detached house' represented the greatest share (50% (316)).

Table 2.11: Q11a Dwelling Type (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non- Irish Citizen (393)
A semi-detached house	40%	37%	39%	43%	38%	35%	35%	39%	45%	36%	45%
A terraced house	25%	26%	24%	25%	26%	19%	25%	30%	24%	28%	20%
An apartment in a purpose-built development	22%	21%	23%	19%	22%	25%	27%	22%	16%	22%	21%
A detached house	8%	8%	7%	6%	11%	12%	8%	4%	8%	9%	5%
An apartment or flat within a converted house	5%	6%	4%	6%	3%	9%	5%	2%	6%	3%	8%
Other	2%	2%	2%	1%	1%	1%	0	3%	1%	2%	1%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non-GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1 yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
A semi-detached house	40%	23%	38%	50%	52%	37%	45%	33%	36%	46%
A terraced house	25%	26%	22%	24%	24%	24%	28%	20%	27%	26%
An apartment in a purpose-built development	22%	35%	32%	13%	9%	26%	11%	28%	23%	17%
A detached house	8%	3%	8%	10%	11%	6%	11%	8%	8%	7%
An apartment or flat within a converted house	5%	9%	0	2%	3%	5%	4%	10%	5%	3%
Other	2%	3%	0	*	*	2%	0	1%	2%	1%

Q11a Is this property a....

2.7.10 Occupancy

According to the survey results, the average number of people living in a rental property was 3.04 (Table 2.12). The average was higher amongst tenants aged 35-44 (average = 3.35), those living outside of Dublin (average = 3.25) and amongst non-Irish citizens (average = 3.28).

Table 2.12: Q12 Occupancy (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
1	12%	6%	10%	9%	26%	15%	11%	7%	16%	16%	6%
2	27%	29%	28%	23%	28%	33%	29%	30%	21%	28%	26%
3	25%	26%	25%	24%	25%	22%	24%	28%	25%	25%	26%
4	24%	28%	25%	28%	13%	20%	25%	28%	21%	21%	27%
5	8%	8%	7%	11%	4%	9%	6%	5%	12%	7%	10%
6 or more	4%	3%	4%	6%	3%	3%	5%	2%	6%	3%	6%
Mean	3.04	3.11	3.03	3.35	2.52	2.82	3.00	3.00	3.18	2.89	3.28
Median	3	3	3	3	2	3	3	3	3	3	3

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non- Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
1	12%	16%	10%	10%	10%	11%	14%	13%	8%	16%
2	27%	34%	32%	22%	20%	29%	22%	33%	32%	18%
3	25%	26%	23%	25%	25%	25%	26%	25%	26%	24%
4	24%	17%	25%	28%	29%	25%	21%	22%	23%	26%
5	8%	4%	9%	10%	10%	7%	10%	3%	8%	10%
6 or more	4%	3%	2%	5%	5%	3%	7%	5%	3%	5%
Mean	3.04	2.71	2.97	3.25	3.31	2.99	3.18	2.86	3.02	3.15
Median	3	2	3	3	3	3	3	3	3	3

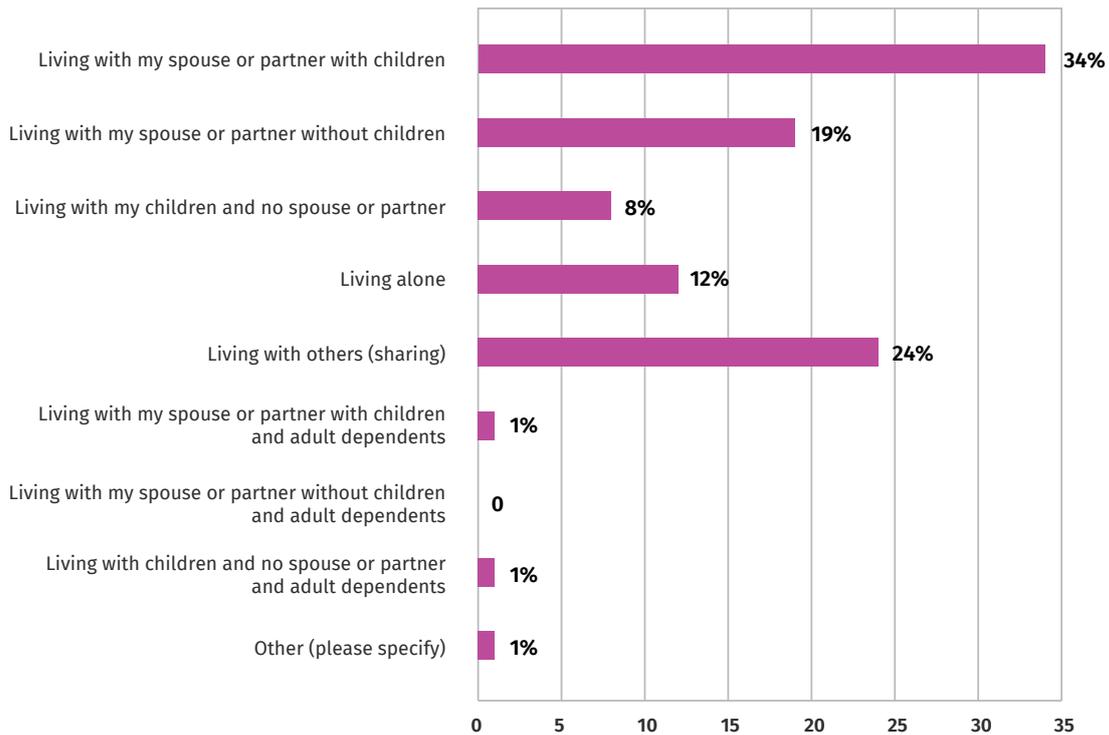
Q12 Including yourself, how many people live in this property?

2.7.11 Household Composition

Figure 2.1 below sets out the household composition for tenants surveyed.

Tenants 'living with my spouse or partner with children' (34% (348)) represented the greatest share, followed by 'living with others (sharing)' (24% (247)) and 'living with my spouse or partner without children' (19% (193)). A total of 8% (81) were 'living with my children and no spouse or partner' and 12% (121) were 'living alone'.

Figure 2.1: Q13 Household Composition (n=1,038)



The majority (54% (73)) of young adults aged 19-24 were 'living with others (sharing)'. Approximately one in four (26% (47)) older renters aged 45+ were 'living alone'. Nearly half (46% (129)) of all 35-44 year old tenants were 'living with my spouse or partner with children'. This was more prevalent among non-Irish citizens accounting for 42% (165) of their living situations (Table 2.13).

In Dublin, the most common living situation, as determined from the survey, was 'living with others (sharing)' (27% (112)).

Table 2.13: Q13 Household Composition (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non- Irish Citizen (393)
Living with my spouse or partner with children	34%	6%	35%	46%	30%	32%	18%	41%	40%	28%	42%
Living with my spouse or partner without children	19%	19%	20%	15%	21%	27%	20%	23%	11%	20%	17%
Living with my children and no spouse or partner	8%	4%	6%	12%	9%	0	3%	4%	17%	9%	6%
Living alone	12%	6%	10%	8%	26%	15%	10%	7%	15%	15%	6%
Living with others (sharing)	24%	54%	26%	15%	9%	21%	43%	21%	12%	24%	24%
Living with my spouse or partner with children and adult dependents	1%	1%	*	2%	0	1%	0	1%	1%	*	1%
Living with my spouse or partner without children and adult dependents	*	0	*	*	1%	0	0	1%	*	*	1%
Living with children and no spouse or partner and adult dependents	1%	1%	0	1%	1%	1%	1%	0	1%	1%	1%
Other	1%	6%	*	*	0	0	2%	1%	1%	1%	2%
Refused	2%	3%	2%	1%	2%	3%	2%	0	2%	2%	1%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non-GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Living with my spouse or partner with children	34%	25%	37%	39%	40%	30%	42%	21%	33%	40%
Living with my spouse or partner without children	19%	24%	27%	15%	13%	21%	13%	23%	24%	10%
Living with my children and no spouse or partner	8%	4%	8%	10%	11%	7%	11%	3%	6%	12%
Living alone	12%	15%	10%	10%	10%	11%	14%	13%	7%	16%
Living with others (sharing)	24%	27%	12%	21%	23%	27%	17%	38%	24%	16%
Living with my spouse or partner with children and adult dependents	1%	*	1%	1%	1%	1%	*	0	*	2%
Living with my spouse or partner without children and adult dependents	*	0	1%	1%	1%	*	1%	0	*	1%
Living with children and no spouse or partner and adult dependents	1%	1%	3%	1%	*	1%	*	0	*	1%
Other	1%	1%	1%	1%	1%	1%	1%	0	1%	1%
Refused	2%	3%	1%	1%	1%	2%	1%	1%	2%	1%

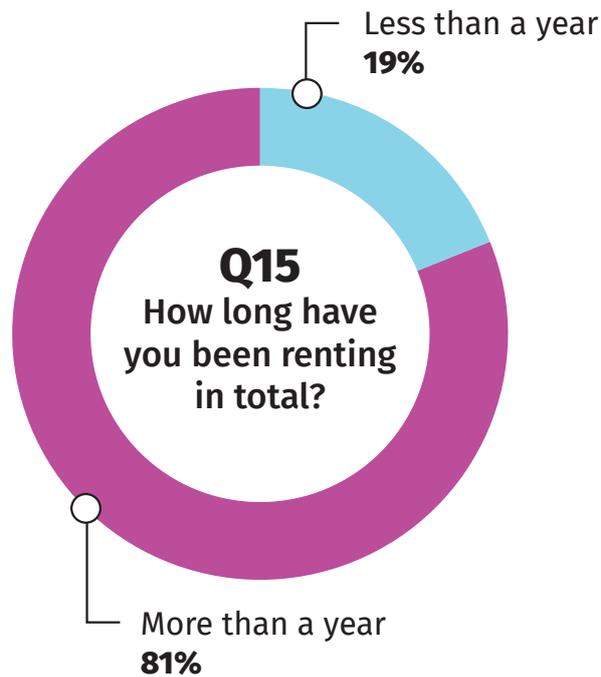
Q13 Which of the following best describes your situation?

2.7.12 Length of Time Renting

Respondents were asked how long they have been renting in total.

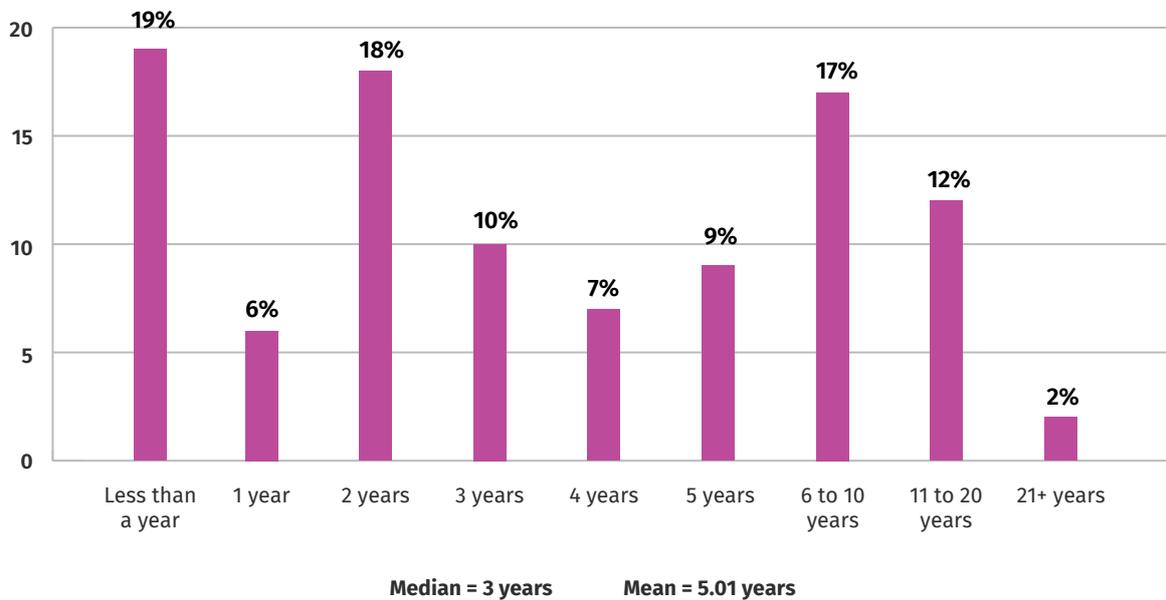
Out of 1,038 tenants surveyed 81% (841) had been renting for more than a year and 19% (197) had been renting for less than a year in total (Figure 2.2).

Figure 2.2: Q15 Length of time renting in the private rental sector (n=1,038)



Amongst the total sample of private renters, the average length of time renting was 5.01 years. Nearly one in five (19% (197)) tenants were renting for ‘less than a year’ and the majority (53% (552)) were renting for three years or less. Figure 2.3.

Figure 2.3: Q16b Length of time renting in the private rental sector (n=1,038)



The average length of time renting in the private rental sector was higher amongst older tenants age 35+, lower socio-economic groups C2DE and those living outside of Dublin (Table 2.14).

Table 2.14: Q16b Length of time renting in the private rental sector (n=1,038)

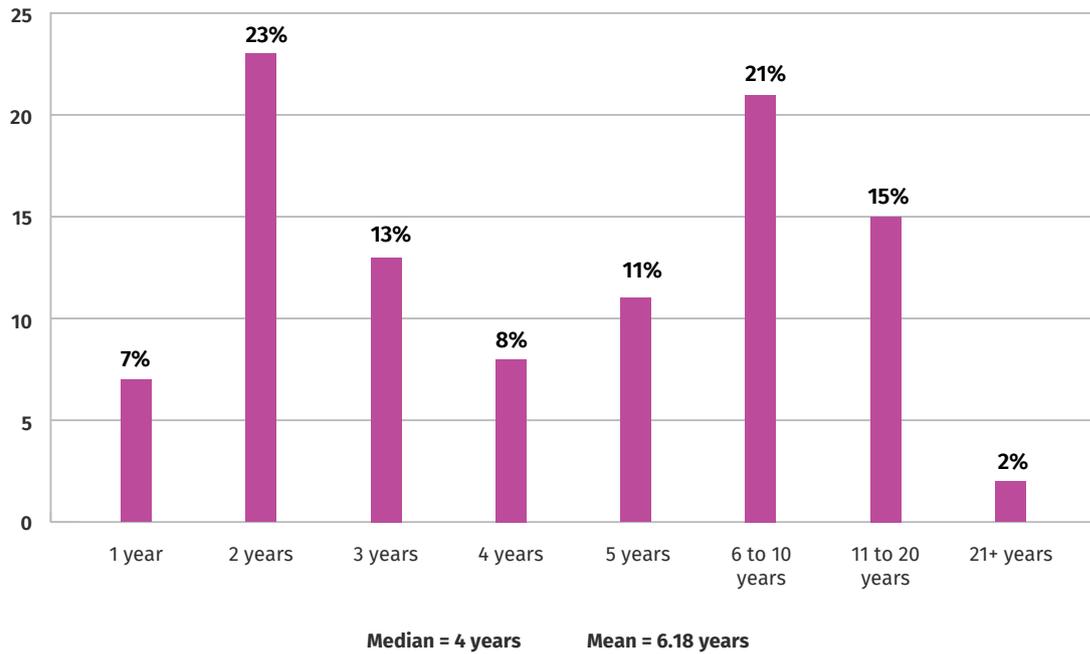
	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Less than a year	19%	33%	23%	13%	8%	16%	31%	12%	15%	16%	23%
1 year	6%	7%	5%	6%	5%	7%	5%	7%	4%	4%	8%
2 years	18%	23%	19%	17%	14%	22%	22%	21%	12%	18%	19%
3 years	10%	14%	12%	9%	7%	14%	14%	9%	7%	10%	11%
4 years	7%	6%	8%	4%	10%	6%	7%	6%	8%	7%	6%
5 years	9%	9%	10%	9%	8%	8%	7%	10%	10%	11%	7%
6 to 10 years	17%	7%	15%	21%	25%	19%	10%	20%	20%	19%	14%
11 to 20 years	12%	1%	8%	21%	18%	9%	3%	13%	20%	12%	12%
21+ years	2%	1%	1%	1%	4%	0	1%	2%	3%	2%	*
Mean	5.01	2.46	3.99	6.1	7.77	4.43	2.97	5.41	6.60	5.53	4.18
Median	3	2	3	5	5	3	2	4	5	4	3

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non-GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1 yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Less than a year	19%	20%	18%	18%	19%	18%	20%	100%	0	0
1 year	6%	8%	4%	4%	4%	6%	4%	0	14%	0
2 years	18%	23%	24%	15%	14%	21%	13%	0	45%	0
3 years	10%	10%	12%	10%	10%	10%	11%	0	25%	0
4 years	7%	5%	4%	8%	8%	7%	8%	0	17	0
5 years	9%	10%	6%	9%	10%	9%	9%	0	0	23%
6 to 10 years	17%	16%	16%	18%	18%	17%	17%	0	0	43%
11 to 20 years	12%	6%	9%	16%	17%	10%	18%	0	0	30%
21+ years	2%	1%	7%	1%	*	2%	0	0	0	3
Mean	5.01	4.17	6.55	5.55	5.36	4.91	5.24	0	2.45	10.02
Median	3	2	3	4	4	3	4	0	2	9

Q16b How many years?

Amongst those renting for one year or longer (841), the average length of time renting was 6.18 years. Tenants renting for two years (23% (190)) represented the greatest share, followed by 6-10 years (21% (178)) and 11-20 years (15% (126)). The results are presented in Figure 2.4.

Figure 2.4: Q16b Length of time renting in the private rental sector excluding tenants that have been renting for less than a year (n=841)



Amongst those renting for one year or longer, the average length of time renting was higher amongst older adults and lower socio-economic groups. Tenants residing outside of Dublin were renting for longer than those living in the capital (Table 2.15).

Table 2.15: Q16b Length of time renting in the private rental sector excluding tenants that have been renting for less than a year (n=841)

	Total (841)	Age				Social Class				Citizenship	
		19-24 (92)	25-34 (342)	35-44 (245)	45+ (162)	AB (106)	C1 (200)	C2 (241)	DE (295)	Irish Citizen (535)	Non-Irish Citizen (302)
1 year	7%	10%	7%	7%	5%	9%	8%	7%	5%	5%	11%
2 years	23%	35%	25%	20%	16%	26%	32%	24%	14%	22%	24%
3 years	13%	21%	15%	10%	8%	16%	20%	11%	9%	12%	14%
4 years	8%	9%	10%	4%	11%	7%	10%	6%	10%	9%	8%
5 years	11%	13%	13%	10%	9%	10%	11%	12%	12%	13%	9%
6 to 10 years	21%	11%	19%	24%	27%	22%	15%	22%	24%	23%	18%
11 to 20 years	15%	1%	10%	24%	19%	11%	5%	15%	23%	14%	16%
21+ years	2%	1%	1%	1%	5%	0	1%	2%	3%	2%	*
Mean	6.18	3.66	5.18	7.02	8.44	5.25	4.30	6.17	7.79	6.61	5.43
Median	4	3	4	5	6	3	3	5	6	5	4

	Total (841)	Region				RPZ		Renting in Total		
		Dublin (327)	GDA (84)	Non-Dublin (515)	Non GDA (431)	Inside RPZ (598)	Outside RPZ (243)	Renting <1 yr (0)	Renting 1-4yrs (427)	Renting 5+yrs (414)
1 year	7%	10%	5%	5%	5%	8%	5%	0	14%	0
2 years	23%	29%	29%	17%	19%	25%	17%	0	45%	0
3 years	13%	13%	15%	12%	13%	13%	13%	0	25%	0
4 years	8%	7%	5%	10%	10%	8%	10%	0	17%	0
5 years	11%	12%	7%	12%	11%	11%	12%	0	0	23%
6 to 10 years	21%	20%	19%	22%	22%	21%	21%	0	0	43%
11 to 20 years	15%	8%	11%	21%	20%	12%	23%	0	0	30%
21+ years	2%	2%	9%	*	1%	2%	0	0	0	3%
Mean	6.18	5.20	7.96	6.80	6.58	6.02	6.58	0	2.45	10.02
Median	4	3	4	5	5	4	5	0	2	9

Q16b How many years?

2.7.13 Length of Time in Current Property

Tenants that had been renting for more than a year in total were asked when they moved into their current property.

A total of 93% (784) moved into their current property 'more than a year ago'.

Amongst those renting for one year or longer and living in Dublin, 98% (321) moved into their current property 'more than a year ago' (Table 2.16).

Table 2.16: Q18a When moved into current property excluding tenants that have been renting for less than a year (n=841)

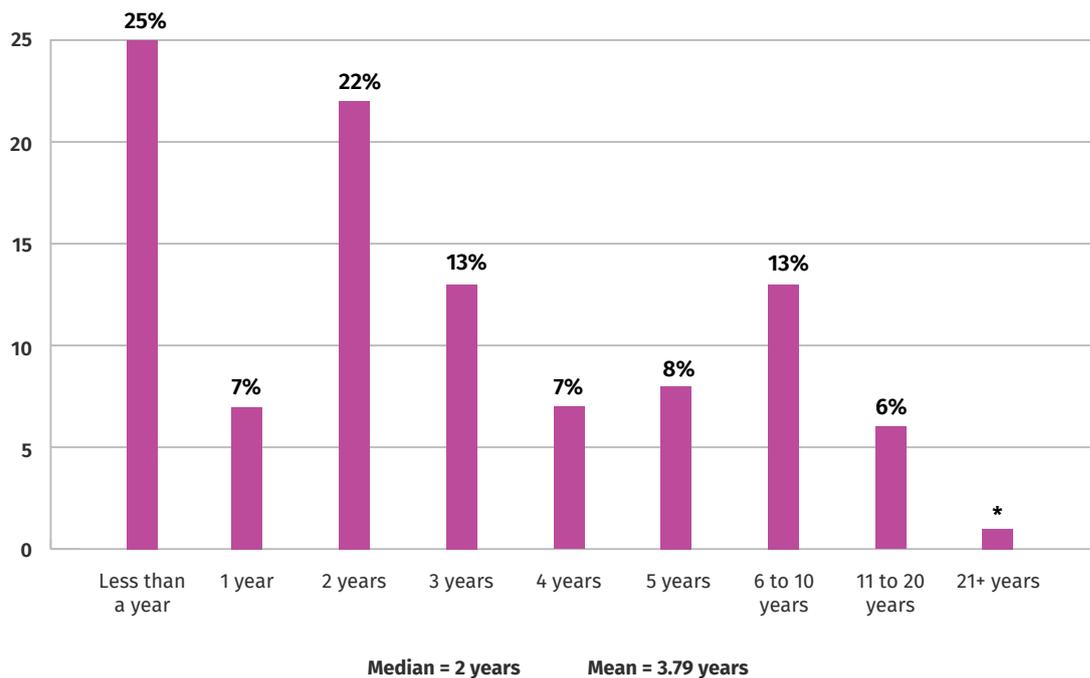
	Total (841)	Age				Social Class				Citizenship	
		19-24 (92)	25-34 (342)	35-44 (245)	45+ (162)	AB (106)	C1 (200)	C2 (241)	DE (295)	Irish Citizen (535)	Non-Irish Citizen (302)
Less than a year ago	7%	10%	7%	6%	7%	7%	6%	7%	7%	6%	9%
More than a year ago	93%	90%	93%	94%	93%	93%	94%	93%	93%	94%	91%

	Total (841)	Region				RPZ		Renting in Total		
		Dublin (327)	GDA (84)	Non-Dublin (515)	Non GDA (431)	Inside RPZ (298)	Outside RPZ (243)	Renting <1 yr (0)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Less than a year ago	7%	2%	4%	10%	11%	6%	10%	0	5%	8%
More than a year ago	93%	98%	96%	90%	89%	94%	90%	0	95%	92%

Q18a When did you move into your current property?

Amongst the total sample of private renters, tenants moved into their current property 3.79 years ago on average. One in four (25% (254)) tenants moved in 'less than a year ago' and 28% (288) moved in five or more years ago (Figure 2.5).

Figure 2.5: Q18b Recency of moving into current property (n=1,038)



On average, young adults aged 19-24 moved into their current property 1.96 years ago. The average for older adults aged 45+ was 6.35 years ago. The average for Irish citizens was 4.37 years ago compared to an average of 2.84 years ago for non-Irish citizens (Table 2.17).

Table 2.17: Q18b Recency of moving into current property (n=1,038)

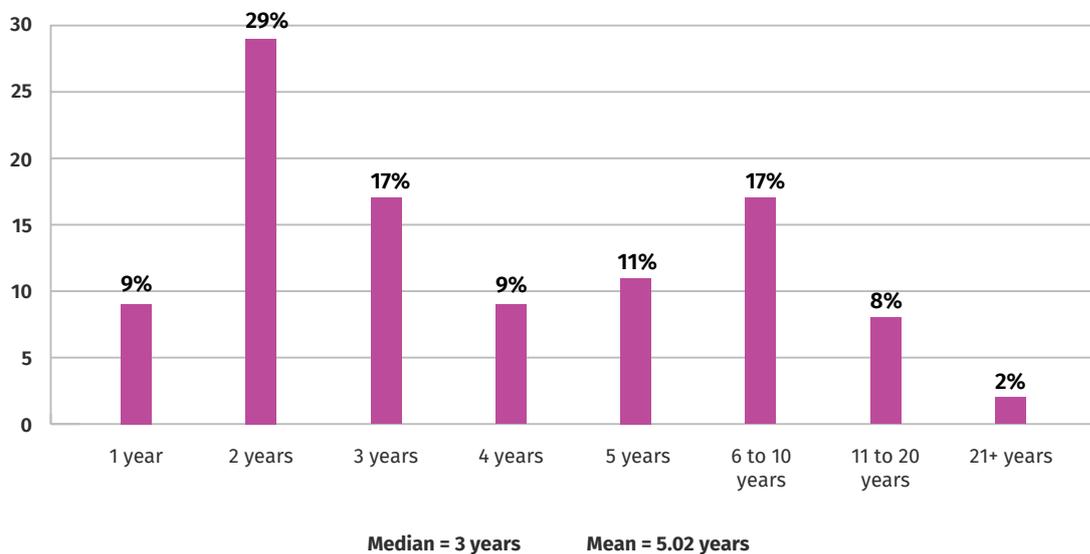
	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Less than a year	25%	39%	28%	18%	14%	22%	35%	18%	21%	21%	30%
1 year	7%	10%	6%	8%	4%	9%	7%	5%	7%	5%	10%
2 years	22%	24%	23%	22%	15%	25%	23%	25%	16%	22%	21%
3 years	13%	14%	14%	11%	11%	13%	14%	14%	11%	13%	12%
4 years	7%	4%	8%	4%	11%	7%	6%	6%	8%	7%	6%
5 years	8%	4%	9%	10%	6%	10%	7%	9%	8%	10%	5%
6 to 10 years	13%	4%	8%	17%	23%	11%	7%	16%	15%	13%	12%
11 to 20 years	6%	1%	3%	9%	12%	4%	1%	4%	12%	7%	4%
21+ years	1%	1%	1%	1%	2%	0	*	2%	2%	2%	0
Mean	3.79	1.96	2.98	4.35	6.35	3.23	2.28	4.01	5.08	4.37	2.84
Median	2	2	2	3	4	2	2	3	3	3	2

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Less than a year	25%	21%	21%	27%	28%	23%	28%	100%	5%	8%
1 year	7%	8%	4%	6%	7%	7%	7%	0	14%	2%
2 years	22%	25%	26%	19%	18%	23%	18%	0	45%	8%
3 years	13%	11%	18%	14%	13%	12%	14%	0	23%	8%
4 years	7%	5%	5%	8%	9%	6%	7%	0	13%	4%
5 years	8%	10%	5%	7%	8%	9%	7%	0	0	20%
6 to 10 years	13%	14%	9%	11%	12%	14%	10%	0	0	31%
11 to 20 years	6%	5%	5%	6%	7%	5%	9%	0	0	15%
21+ years	1%	1%	6%	1%	0	2%	0	0	0	2%
Mean	3.79	3.86	5.64	3.75	3.38	3.96	3.39	0	2.24	7.19
Median	2	2	2	2	2	2	2	0	2	5

Q18b How many years ago?

Amongst those tenants who moved into their current property more than a year ago, 38% (294) moved in up to two years ago. A similar proportion (37%) moved in five or more years ago. On average, these tenants moved into their current property 5.02 years ago (Figure 2.6).

Figure 2.6: Q18b Recency of moving into current property excluding tenants that have been renting for less than a year and those who moved in less than a year ago (n=784)



Note: recorded to nearest number of years

On average, young adults aged 19-24 moved into their current property 3.22 years ago. The average for 35-44 year olds was 5.30 years ago and for older adults aged 45+ the average was 7.40 years ago. Long-term renters (5+ years) moved into their current property 7.85 years ago on average (Table 2.18).

Table 2.18: Recency of moving into current property excluding tenants that have been renting for less than a year and those who moved in less than a year ago (n=784)

	Total (784)	Age				Social Class				Citizenship	
		19-24 (83)	25-34 (318)	35-44 (231)	45+ (151)	AB (98)	C1 (187)	C2 (225)	DE (274)	Irish Citizen (503)	Non-Irish Citizen (276)
1 year	9%	16%	8%	10%	5%	11%	11%	6%	9%	6%	15%
2 years	29%	40%	32%	27%	18%	32%	36%	31%	20%	28%	30%
3 years	17%	22%	19%	14%	13%	16%	22%	17%	14%	17%	17%
4 years	9%	6%	11%	5%	13%	8%	9%	8%	10%	9%	9%
5 years	11%	7%	13%	12%	7%	13%	10%	11%	10%	13%	7%
6 to 10 years	17%	7%	12%	21%	27%	14%	11%	20%	19%	16%	18%
11 to 20 years	8%	1%	5%	11%	14%	6%	1%	5%	15%	9%	5%
21+ years	2%	1%	1%	1%	4%	0	*	2%	3%	2%	0
Mean	5.02	3.22	4.16	5.30	7.40	4.14	3.52	4.92	6.45	5.56	4.05
Median	3	2	3	3	5	3	3	3	4	3	3

	Total (784)	Region				RPZ		Renting in Total		
		Dublin (321)	GDA (81)	Non-Dublin (463)	Non-GDA (382)	Inside RPZ (564)	Outside RPZ (219)	Renting <1 yr (0)	Renting 1-4yrs (404)	Renting 5+yrs (380)
1 year	9%	10%	4%	8%	9%	8%	10%	0	15%	3%
2 years	29%	32%	33%	26%	25%	30%	26%	0	47%	9%
3 years	17%	14%	23%	19%	18%	16%	19%	0	24%	9%
4 years	9%	6%	7%	11%	12%	8%	10%	0	14%	4%
5 years	11%	12%	6%	10%	11%	11%	9%	0	0	22%
6 to 10 years	17%	18%	12%	15%	16%	18%	13%	0	0	34%
11 to 20 years	8%	6%	7%	9%	9%	8%	12%	0	0	19%
21+ years	2%	2%	9%	1%	0	1%	0	0	0	1%
Mean	5.02	4.90	7.14	5.11	4.68	5.14	4.72	0	2.36	7.85
Median	3	3	3	3	3	3	3	0	2	6

Q18b How many years ago?

2.7.14 Number of Separate Properties Rented in Ireland

Figure 2.7 below sets out the number of separate properties rented in Ireland in the private rental sector. The average number of separate properties rented was 2.32. Tenants renting one property (37% (386)) represented the greatest share, followed by two properties (25% (256)). Nearly one in ten (9% (98)) rented five or more properties over the years.

It was also seen in the qualitative research that many tenants had extensive experience of renting.

Figure 2.7: Q17a Number of separate properties rented in Ireland in the private rental sector (n=1,038)

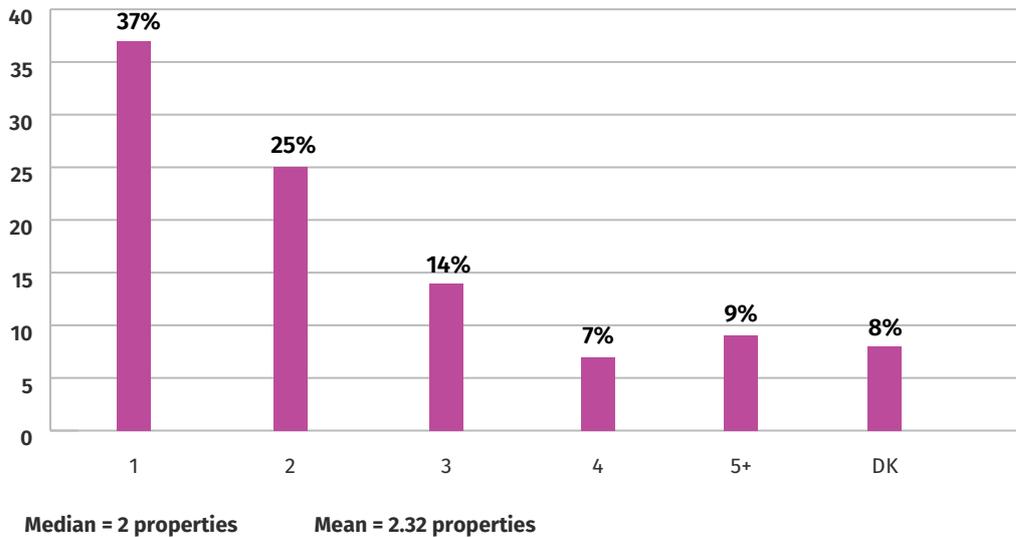


Table 2.19: Q17a Number of separate properties rented in Ireland in the private rental sector (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
1	37%	65%	35%	32%	29%	28%	45%	34%	36%	34%	41%
2	25%	13%	26%	25%	29%	27%	22%	27%	23%	24%	26%
3	14%	5%	14%	18%	13%	9%	15%	16%	13%	13%	15%
4	7%	6%	9%	8%	3%	12%	3%	10%	6%	8%	6%
5+	9%	2%	9%	9%	17%	12%	5%	6%	15%	11%	8%
DK	8%	8%	6%	9%	10%	11%	9%	6%	7%	10%	3%
Mean	2.43	1.58	2.46	2.53	2.86	2.84	1.97	2.39	2.71	2.57	2.23
Median	2	1	2	2	2	2	2	2	2	2	2

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1 yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
1	37%	29%	35%	42%	44%	37%	39%	62%	37%	26%
2	25%	30%	24%	21%	21%	26%	21%	16%	29%	24%
3	14%	12%	26%	15%	12%	13%	15%	8%	15%	16%
4	7%	4%	9%	9%	9%	6%	9%	4%	6%	10%
5+	9%	7%	4%	11%	13%	8%	14%	6%	7%	14%
DK	8%	18%	2%	1%	1%	10%	2%	4%	6%	11%
Mean	2.43	2.36	2.26	2.47	2.51	2.30	2.72	2.00	2.25	2.85
Median	2	2	2	2	2	2	2	1	2	2

Q17a How many separate properties have you rented in Ireland over the years in the private rental sector?

2.7.15 Property Ownership

Respondents were asked if they currently own a property.

Property ownership was low overall with 7% (72) of tenants claiming to currently own a property (Figure 2.8).

Figure 2.8: Q17b Current Property Ownership (n=997)



The survey results indicated that property ownership was highest amongst older adults aged 45+ (16% (27)) and socio-economic group AB and C1 (Table 2.20).

Table 2.20: Q17b Current Property Ownership (n=997)

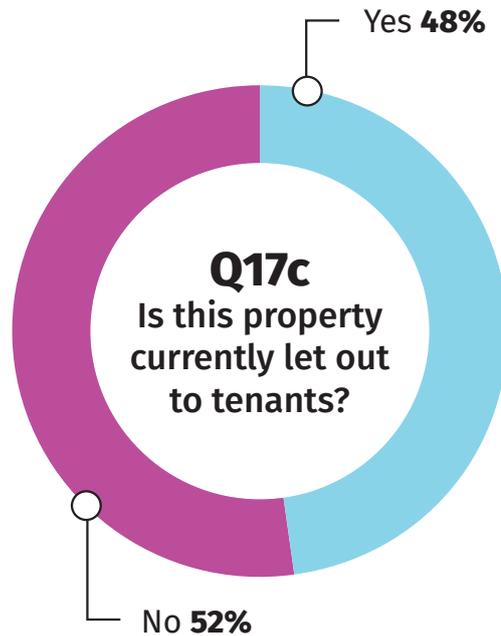
	Total	Age				Social Class				Citizenship	
	(997)	19-24 (131)	25-34 (426)	35-44 (269)	45+ (171)	AB (117)	C1 (280)	C2 (272)	DE (327)	Irish Citizen (624)	Non-Irish Citizen (367)
Yes	7%	1%	4%	9%	16%	11%	12%	6%	3%	8%	5%
No	93%	99%	96%	91%	84%	89%	88%	94%	97%	92%	95%

	Total	Region				RPZ		Renting in Total		
	(997)	Dublin (390)	GDA (102)	Non-Dublin (606)	Non GDA (504)	Inside RPZ (697)	Outside RPZ (300)	Renting <1 yr (187)	Renting 1-4yrs (419)	Renting 5+yrs (391)
Yes	7%	8%	5%	6%	7%	9%	3%	7%	10%	5%
No	93%	92%	95%	94%	93%	91%	97%	93%	90%	95%

Q17b Do you currently own a property?

Amongst those that owned a property, fewer than half (48% (34)) had the property let out to tenants at the time they were surveyed (Figure 2.9).

Figure 2.9: **Q17c Whether property currently let out to tenants excluding those who don't currently own a property (n=72)**

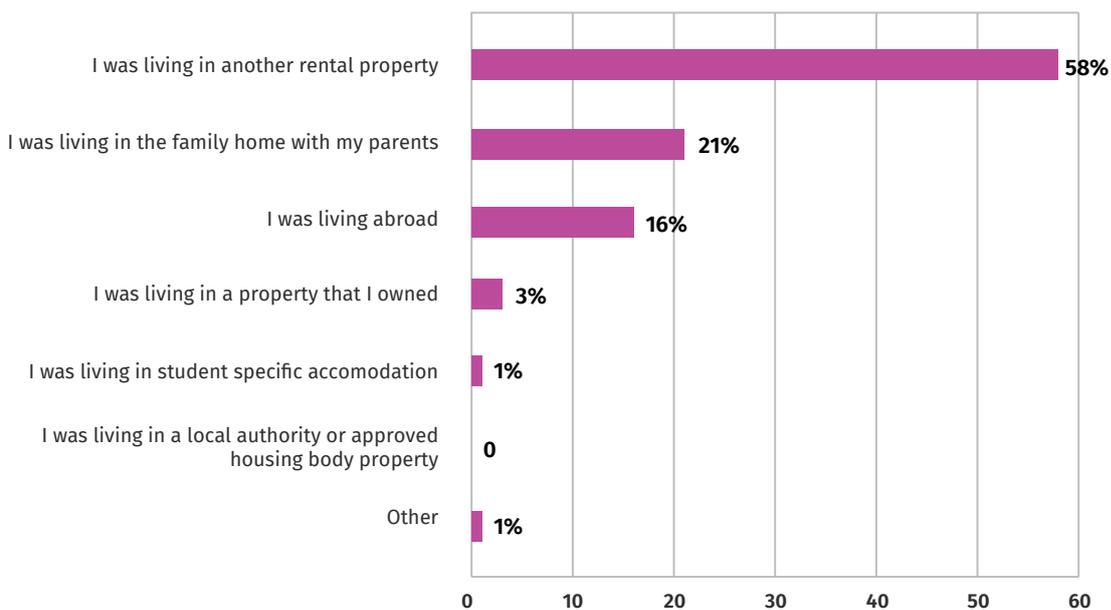


2.7.16 Where Lived Prior to Current Rental Property

All respondents were asked what best describes where they lived prior to moving into their current rental property.

It can be seen from Figure 2.10 below that the majority of tenants had a history of renting with 58% (602) 'living in another rental property' before moving into their current rental property. One in five (21% (220)) were 'living in the family home with my parents' and 16% (167) were 'living abroad'.

Figure 2.10: **Q19 Where lived prior to moving into current rental property (n=1,038)**



Not surprisingly, older adults had a longer history of renting – 68% (120) of those aged 45+ had previously been living in another rental property. More than half (56% (76)) of all young adults aged 19-24 were ‘living in the family home with my parents’ before moving into their current rental property (Table 2.21).

Table 2.21: Q19 Where lived prior to moving into current rental property (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
I was living in another rental property	58%	31%	60%	61%	68%	68%	47%	64%	59%	56%	62%
I was living in the family home with my parents	21%	56%	20%	14%	9%	12%	24%	21%	22%	31%	6%
I was living abroad	16%	12%	17%	19%	12%	17%	22%	13%	13%	8%	29%
I was living in a property that I owned	3%	0	*	4%	10%	2%	4%	2%	3%	4%	1%
Was living in student specific accommodation	1%	1%	2%	1%	0	1%	3%	0	*	1%	1%
I was living in a local authority or approved housing body property	*	0	*	0	1%	0	0	*	1%	*	*
Other (Please specify)	1%	1%	1%	1%	0	0	0	0	2%	*	1%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
I was living in another rental property	58%	61%	62%	56%	55%	57%	60%	40%	59%	65%
I was living in the family home with my parents	21%	18%	26%	23%	23%	21%	22%	29%	20%	18%
I was living abroad	16%	19%	8%	14%	16%	18%	12%	25%	16%	12%
I was living in a property that I owned	3%	1%	4%	4%	4%	3%	3%	2%	3%	4%
Was living in student specific accommodation	1%	2%	0	1%	1%	1%	1%	3%	1%	*
I was living in a local authority or approved housing body property	*	0	0	*	1%	0	1%	0	0	1%
Other (Please specify)	1%	0	1%	1%	1%	*	1%	1%	1%	0

Q19 Before moving into your current rental property, what best describes where you lived?

2.8 Renting Experience

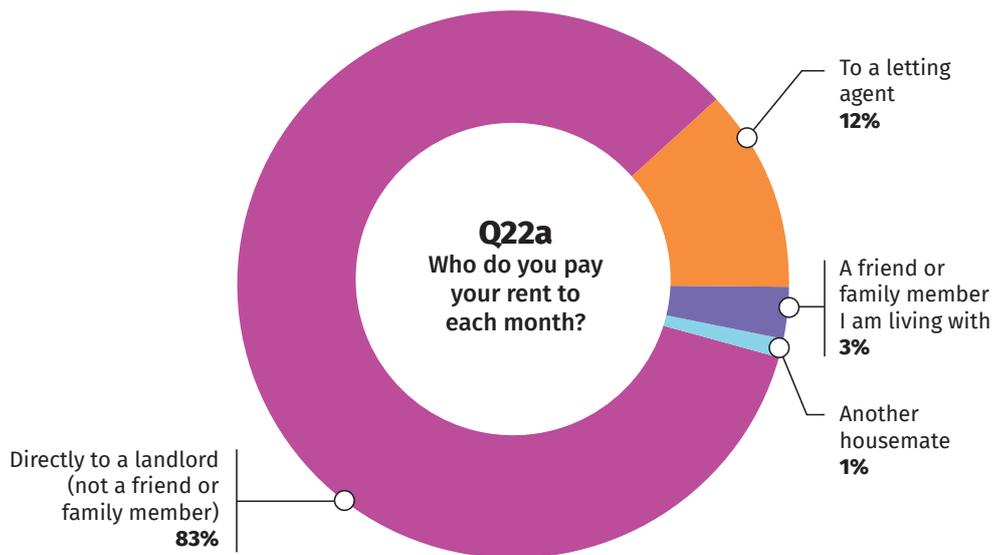
This section of the survey asked a range of questions about the renting experience.

2.8.1 Paying Rent

Firstly, respondents that were not in receipt of rental assistance were asked who they pay rent to each month.

Figure 2.11 below shows that the majority (83% (698)) were paying rent 'directly to a landlord (not a friend or family member)'. A total of 12% (100) were paying rent 'to a letting agent'. The remainder were paying rent to 'a friend or family member I am living with' (3% (26)) or 'another housemate' (1% (12)).

Figure 2.11: Q22a Who pay rent to each month excluding tenants in receipt of rental assistance (n=836)



These results were consistent across the different demographic subgroups (Table 2.22).

Table 2.22: Q22a Who pay rent to each month excluding tenants in receipt of rental assistance (n=836)

	Total (836)	Age				Social Class				Citizenship	
		19-24 (120)	25-34 (367)	35-44 (219)	45+ (130)	AB (116)	C1 (274)	C2 (253)	DE (193)	Irish Citizen (495)	Non-Irish Citizen (337)
Directly to a landlord (not a friend or family member)	83%	79%	86%	83%	81%	86%	82%	82%	85%	84%	83%
To a letting agent	12%	11%	10%	14%	15%	12%	12%	14%	8%	12%	12%
A friend or family member I am living with	3%	7%	2%	3%	4%	2%	3%	3%	5%	3%	3%
Another housemate	1%	4%	2%	1%	0	0	3%	0	2%	1%	2%

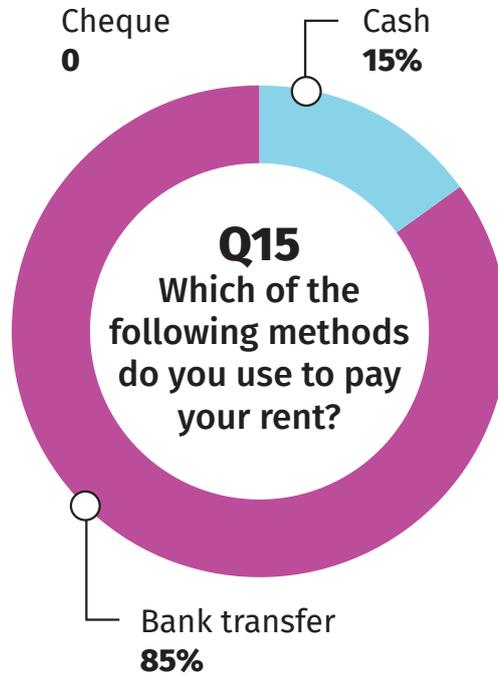
	Total (836)	Region				RPZ		Renting in Total		
		Dublin (358)	GDA (79)	Non-Dublin (478)	Non GDA (400)	Inside RPZ (615)	Outside RPZ (221)	Renting <1yr (176)	Renting 1-4yrs (361)	Renting 5+yrs (299)
Directly to a landlord (not a friend or family member)	83%	84%	88%	83%	82%	84%	83%	77%	85%	85%
To a letting agent	12%	13%	7%	11%	12%	11%	14%	14%	11%	11%
A friend or family member I am living with	3%	3%	3%	4%	4%	3%	3%	5%	2%	3%
Another housemate	1%	1%	1%	2%	2%	2%	*	4%	1%	1%

Q22a Who do you pay your rent to each month?

Figure 2.12 sets out the methods that tenants used to pay rent.

Tenants that paid their rent by 'bank transfer' represented the greatest share (85% (687)). The remaining tenants paid their rent with 'cash' (15% (119)).

Figure 2.12: Q22b Methods used to pay rent excluding tenants in receipt of rental assistance (n=808)



'Cash' was a more popular payment method amongst young adults aged 19-24 (25% (30)), socio-economic group DE (27% (49)) and tenants living outside of rent pressure zones (28% (60)).

'Bank transfer' was more likely to be used by adults aged 45+ (90% (113)), socio-economic group AB (94% (103)) and in Dublin (93% (317)).

Table 2.23: Q22b Methods used to pay rent excluding tenants in receipt of rental assistance (n=808)

	Total (808)	Age				Social Class				Citizenship	
		19-24 (117)	25-34 (355)	35-44 (210)	45+ (126)	AB (110)	C1 (266)	C2 (250)	DE (182)	Irish Citizen (484)	Non-Irish Citizen (320)
Cash	15%	25%	13%	14%	10%	6%	12%	13%	27%	16%	12%
Bank transfer	85%	73%	87%	86%	90%	94%	88%	87%	72%	83%	87%
Cheque	*	1%	0	0	1%	0	0	0	1%	*	*

	Total (808)	Region				RPZ		Renting in Total		
		Dublin (341)	GDA (79)	Non-Dublin (467)	Non GDA (388)	Inside RPZ (591)	Outside RPZ (218)	Renting <1 yr (169)	Renting 1-4yrs (357)	Renting 5+yrs (283)
Cash	15%	7%	10%	20%	22%	10%	28%	17%	13%	16%
Bank transfer	85%	93%	90%	79%	77%	90%	72%	82%	87%	84%
Cheque	*	0	0	*	1%	*	1%	1%	0	*

Q22b Which of the following methods do you use to pay your rent?

Amongst those tenants that paid their rent with cash, the majority (57% (68)) claimed that they received receipts.

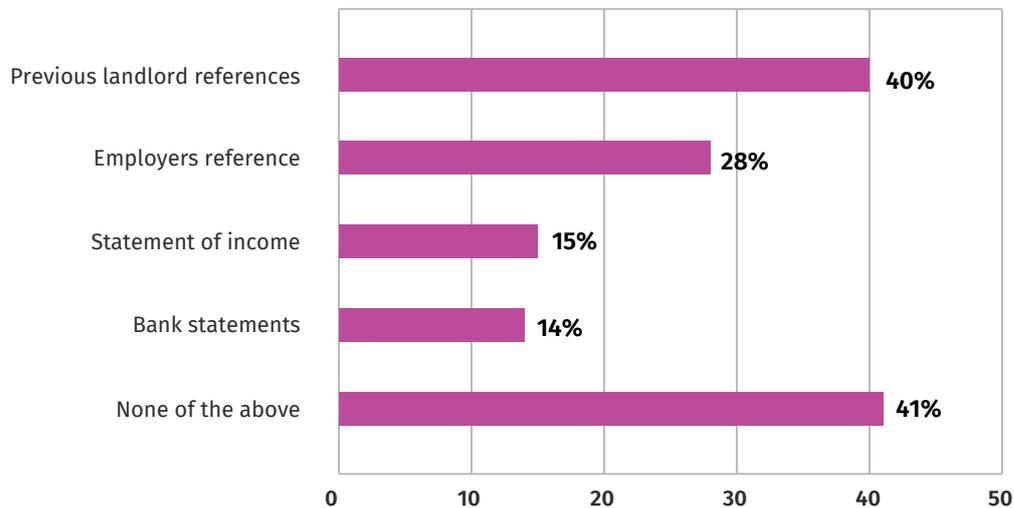
2.8.2 Documentation Required Prior to Renting

Respondents were asked which documentation, if any, they were required to provide the landlord with prior to renting their current property.

A total of 59% (617) of tenants stated that they were required to provide the landlord with documentation prior to renting their current property.

'Previous landlord references' were most often required (40% (419)). Nearly three in ten (28% (293)) tenants were required to provide an 'employer's reference'. A 'statement of income' (15% (154)) and 'bank statements' (14% (149)) were also required. Four in ten (41% (421)) tenants were not required to provide the landlord with any documentation prior to renting their current property.

Figure 2.13: Q25 Documentation required to provide landlord with prior to renting (n=1,038)



Non-Irish citizens were more likely than Irish citizens to be required to provide the landlord with documentation prior to renting. Documentation required of non-Irish citizens included 'previous landlord references' (45% (178)), 'employer's reference' (33% (131)), 'statement of income' (21% (84)) and 'bank statements' (20% (77)).

The majority (52% (181)) of tenants in socio-economic group DE were not required to provide any documentation. A similar proportion of young adults aged 19-24 (48% (66)) were not required to provide any documentation.

Tenants renting inside rent pressure zones were more likely to be required to provide the landlord with documentation than tenants renting outside rent pressure zones.

Table 2.24: Q25 Documentation required to provide landlord with prior to renting (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Previous landlord references	40%	24%	41%	44%	46%	50%	35%	48%	36%	38%	45%
Employers reference	28%	29%	32%	26%	22%	42%	35%	30%	16%	25%	33%
Statement of income	15%	13%	15%	14%	17%	21%	16%	15%	12%	11%	21%
Bank statements	14%	16%	15%	16%	11%	18%	17%	13%	13%	11%	20%
None of the above	41%	48%	39%	39%	41%	33%	39%	31%	52%	44%	34%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non-GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Previous landlord references	40%	47%	46%	36%	34%	42%	37%	30%	41%	44%
Employers reference	28%	36%	38%	23%	20%	34%	14%	36%	33%	20%
Statement of income	15%	18%	15%	12%	12%	17%	9%	16%	15%	14%
Bank statements	14%	18%	15%	12%	11%	16%	10%	20%	16%	10%
None of the above	41%	33%	36%	45%	47%	37%	49%	42%	36%	44%

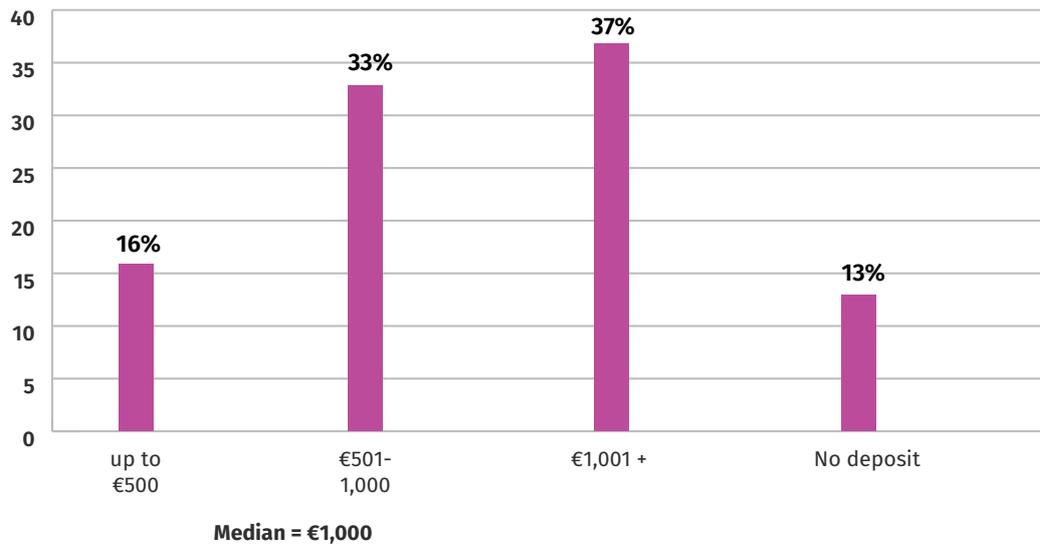
Q25 Were you required to provide the landlord with any of the following prior to renting this property?

2.8.3 Deposit Paid

A security deposit is normally paid by a tenant to a landlord or agent at the beginning of a tenancy.

The survey found that the median deposit paid by tenants when first renting their current property was €1,000. Figure 2.14 shows that one in three (33% (330)) tenants paid between €501-€1,000 and 37% (374) paid more than €1,000. A total of 16% (162) paid up to €500 and 13% (130) stated that they paid no deposit at all when first renting their current property.

Figure 2.14: Q26a Deposit paid when first renting current property (n=997)



The median deposit paid was highest amongst socio-economic group AB (€1,300), tenants renting in Dublin (€1,450) and the Greater Dublin Area (€1,200). The median deposit paid was significantly higher inside rent pressure zones (€1,200) vs outside rent pressure zones (€650). Approximately one in five (18% (23)) of 19-24 year olds and socio-economic group DE (22% (73)) stated that no deposit was paid when first renting their current property (Table 2.25).

Table 2.25: Q26a Deposit paid when first renting current property (n=997)

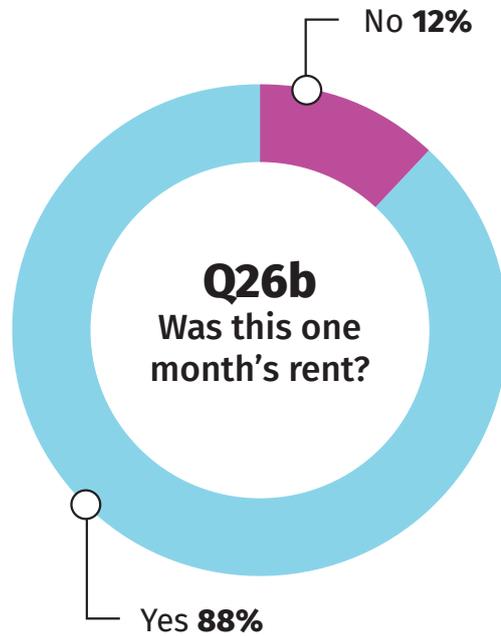
	Total (997)	Age				Social Class				Citizenship	
		19-24 (131)	25-34 (426)	35-44 (269)	45+ (171)	AB (117)	C1 (280)	C2 (272)	DE (327)	Irish Citizen (624)	Non-Irish Citizen (367)
Up to €100	*	0	*	*	0	0	0	0	1%	*	0
€101 to €500	16%	29%	18%	11%	11%	8%	24%	11%	17%	17%	15%
€501 to €1000	33%	22%	32%	38%	36%	21%	27%	38%	38%	32%	35%
€1001+	37%	32%	40%	38%	35%	58%	43%	41%	22%	33%	44%
No deposit	13%	18%	10%	13%	17%	13%	5%	10%	22%	17%	6%
Median €	1000	850	900	1000	1000	1300	1000	1000	800	900	1000

	Total (997)	Region				RPZ		Renting in Total		
		Dublin (390)	GDA (102)	Non-Dublin (606)	Non GDA (504)	Inside RPZ (697)	Outside RPZ (300)	Renting <1yr (187)	Renting 1-4yrs (419)	Renting 5+yrs (391)
Up to €100	*	0	0	*	*	0	1%	0	0	*
€101 to €500	16%	10%	8%	20%	23%	13%	24%	27%	14%	13%
€501 to €1000	33%	14%	28%	46%	49%	24%	53%	24%	29%	41%
€1001+	37%	63%	53%	21%	15%	51%	6%	39%	48%	26%
No deposit	13%	14%	11%	12%	13%	11%	17%	9%	9%	20%
Median €	1000	1450	1200	800	750	1200	650	900	1100	800

Q26a When first renting your current property, how much of a deposit were you required to pay?

Figure 2.15 below shows that amongst those tenants that paid a deposit, 88% (767) paid a deposit equal to one month's rent.

Figure 2.15: **Q26b Whether deposit paid was one month's rent excluding tenants who did not pay a deposit (n=867)**



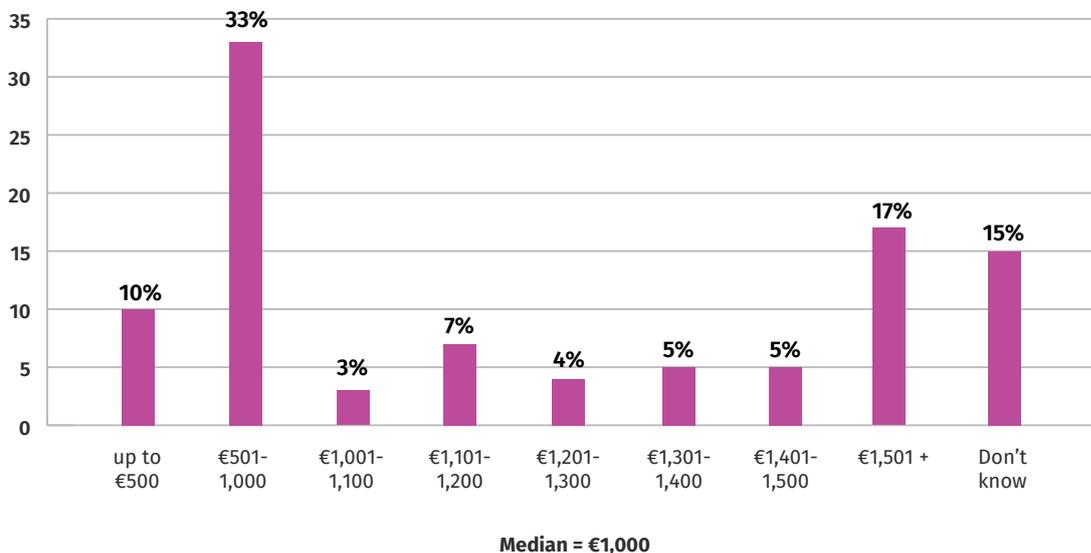
2.8.4 Total Rent Paid on the Property

All respondents were asked the total amount of rent paid on the property.

Figure 2.16 sets out the total amount of rent paid on a monthly basis.

The median rent paid per month in total for the property was €1,000. One in ten (10% (112)) tenants paid up to €500 in total for the property. One third (33% (344)) paid €501-€1,000 and 24% (252) paid €1,001-€1,500 in total for the property. Nearly one in five (17% (176)) tenants paid more than €1,500 per month in total for the property and 15% (154) did not know the total monthly rent paid on the property.

Figure 2.16: **Q28a Total amount of rent paid on the property (n=1,038)**



The median rent paid per month in total for the property varied by region and socio-economic group. Table 2.26 below shows the median rent per month in total for the property to be €1,500 in Dublin and €1,200 in the Greater Dublin Area. This compares with a median rent of €800 outside of Dublin and Greater Dublin. These differences are also reflected in the median rent paid inside rent pressure zones (€1,208) vs outside rent pressure zones (€700).

Table 2.26: Q28a Total amount of rent paid on the property (n=1,038)

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non-GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Up to €500	10%	7%	8%	13%	14%	7%	19%	14%	9%	11%
€501 to €1000	33%	10%	20%	48%	53%	22%	61%	26%	28%	42%
€1001 to €1100	3%	2%	8%	4%	3%	5%	*	2%	3%	4%
€1101 to €1200	7%	7%	15%	7%	5%	9%	1%	5%	7%	8%
€1201 to €1300	4%	4%	9%	4%	3%	6%	0	5%	5%	2%
€1301 to €1400	5%	5%	11%	5%	4%	7%	0	2%	6%	5%
€1401 to €1500	5%	10%	8%	2%	1%	7%	0	7%	6%	4%
€1501+	17%	34%	11%	6%	5%	23%	2%	22%	24%	7%
Don't know	15%	21%	10%	11%	11%	14%	17%	18%	12%	17%
Median €	1000	1500	1200	800	800	1208	700	1100	1200	850

Q28a At present, how much is the total amount of rent paid on the property?

Tenants in the lower socio-economic groups paid less rent in total for their property. €800 was the median monthly rent paid by socio-economic group DE. This compares to a median monthly rent of €1,400 paid by socio-economic group AB (Table 2.27).

Table 2.27: Q28a Total amount of rent paid on the property (n=1,038)

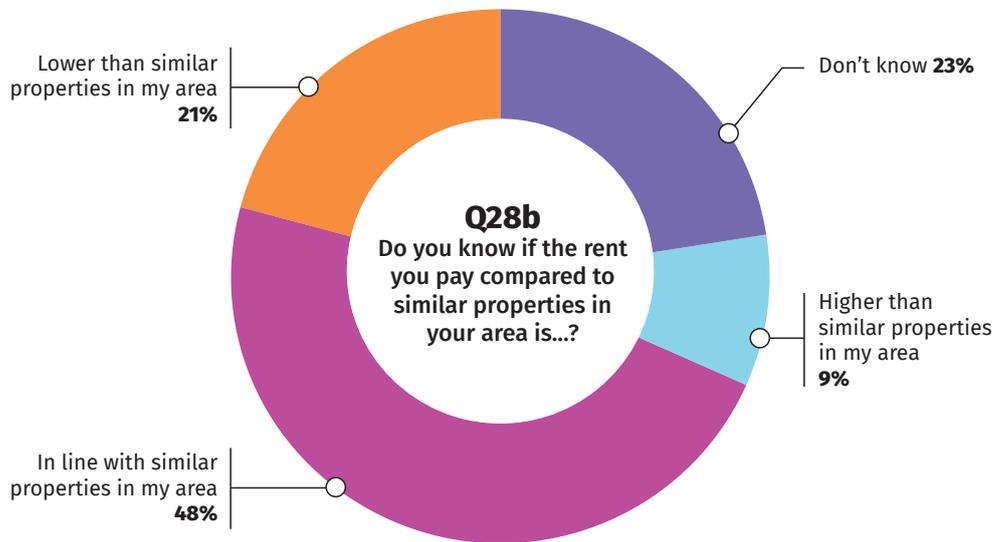
	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Up to €500	10%	19%	8%	11%	12%	5%	12%	6%	16%	12%	8%
€501 to €1000	33%	26%	34%	33%	37%	21%	22%	37%	44%	33%	34%
€1001 to €1100	3%	3%	3%	4%	4%	2%	4%	3%	4%	3%	3%
€1101 to €1200	7%	7%	6%	8%	8%	2%	7%	10%	6%	7%	7%
€1201 to €1300	4%	4%	4%	4%	4%	7%	4%	5%	2%	4%	4%
€1301 to €1400	5%	4%	6%	5%	4%	5%	5%	7%	3%	4%	6%
€1401 to €1500	5%	8%	4%	6%	6%	7%	7%	6%	3%	5%	6%
€1501+	17%	19%	20%	15%	12%	35%	23%	16%	6%	16%	19%
Don't know	15%	11%	17%	14%	13%	16%	17%	10%	16%	16%	12%
Median €	1000	1000	1050	1000	1000	1400	1200	1100	800	1000	1100

Q28a At present, how much is the total amount of rent paid on the property?

Tenants were asked how the rent they paid compared to similar properties in their area (Figure 2.17).

Nearly half (48% (501)) of all tenants believed that the rent they paid was in ‘line with similar properties’ in their area. One in five (21% (214)) claimed that the rent they paid was ‘lower’ and 9% (89) claimed that the rent was ‘higher than similar properties in my area’. Interestingly, 23% (235) said that they did not know how the rent they paid compared to similar properties in their area.

Figure 2.17: Q28b How rent paid compares to similar properties in the area (n=1,038)



Young adults aged 19-24 and those living in Dublin/GDA were less likely to know how the rent they paid compared to similar properties in their area. Amongst those who had been renting for longer (5+ years), 27% (112) claimed that the rent they paid was lower compared to similar properties in their area (Table 2.28).

Table 2.28: Q28b How rent paid compares to similar properties in the area (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Higher than similar properties in my area	9%	6%	9%	9%	7%	16%	3%	11%	8%	8%	10%
In line with similar properties in my area	48%	50%	46%	50%	51%	47%	52%	49%	44%	46%	52%
Lower than similar properties in my area	21%	16%	21%	20%	23%	17%	20%	19%	24%	21%	19%
Don't know	23%	28%	24%	20%	19%	21%	24%	20%	24%	25%	19%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1 yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Higher than similar properties in my area	9%	10%	5%	7%	8%	8%	10%	11%	9%	7%
In line with similar properties in my area	48%	45%	42%	50%	52%	47%	50%	46%	55%	42%
Lower than similar properties in my area	21%	17%	27%	23%	22%	22%	17%	15%	17%	27%
Don't know	23%	27%	26%	20%	19%	23%	23%	28%	18%	24%

Q28b Do you know if the rent you pay compared to similar properties in your area is...?

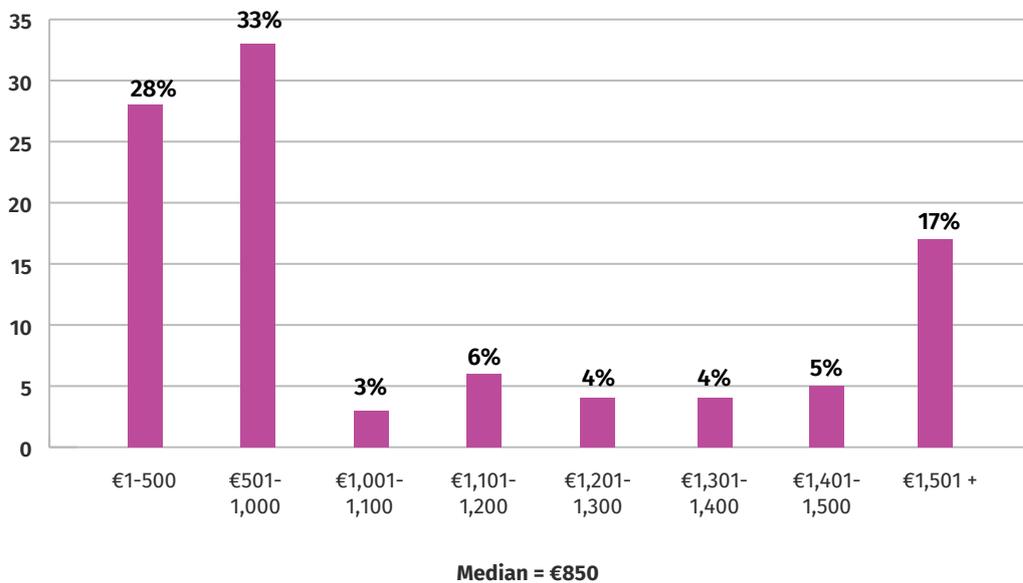
2.8.5 Individual Rent Paid by the Tenant

All respondents were then asked how much they personally pay in rent on a monthly basis.

Figure 2.18 sets out the individual monthly rent paid by tenants for their current property.

The median rent paid per month was €850. A total of 28% (290) of tenants paid up to €500 per month for their property. One in three (33% (347)) paid €501-€1,000 and 22% (227) paid €1,001-€1,500 for their property. Nearly one in five (17% (174)) tenants paid more than €1,500 per month for their current property.

Figure 2.18: Q27 Monthly rent paid by tenant for current property (n=1,038)



The median rent paid per month varied significantly by region. Table 2.29 below shows the median rent per month to be €1,400 in Dublin and €1,155 in the Greater Dublin Area. This compares to a median rent per month of €650 outside of Dublin. These differences are also reflected in the median rent paid inside rent pressure zones (€1,150) vs outside rent pressure zones (€600).

Table 2.29: Q27 Monthly rent paid by tenant for current property (n=1,038)

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non-GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1 yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Up to €500	28%	15%	19%	37%	40%	22%	44%	38%	20%	31%
€501 to €1000	33%	18%	25%	43%	47%	24%	55%	27%	31%	39%
€1001 to €1100	3%	3%	4%	3%	3%	4%	1%	2%	3%	3%
€1101 to €1200	6%	7%	14%	5%	3%	8%	1%	4%	6%	6%
€1201 to €1300	4%	4%	11%	4%	3%	6%	0	5%	5%	3%
€1301 to €1400	4%	5%	8%	4%	3%	6%	0	1%	6%	4%
€1401 to €1500	5%	10%	7%	1%	*	7%	0	5%	6%	3%
€1501+	17%	38%	11%	3%	2%	24%	0	18%	22%	11%
Median €	850	1400	1155	700	650	1150	600	750	1000	750

Q27 At present, how much do you pay in rent for this property on a monthly basis?

Tenants in the lower socio-economic groups paid less rent. The median monthly rent paid by socio-economic group DE was €650. This compares to a median monthly rent of €1,350 paid by socio-economic group AB (Table 2.30).

Table 2.30: Q27 Monthly rent paid by tenant for current property (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Up to €500	28%	40%	26%	28%	26%	8%	31%	14%	43%	32%	21%
€501 to €1000	33%	27%	35%	33%	35%	28%	26%	40%	36%	33%	34%
€1001 to €1100	3%	2%	3%	3%	4%	2%	4%	3%	3%	3%	4%
€1101 to €1200	6%	3%	5%	7%	7%	5%	5%	9%	4%	5%	7%
€1201 to €1300	4%	4%	5%	4%	4%	6%	5%	6%	3%	4%	5%
€1301 to €1400	4%	2%	5%	5%	3%	6%	3%	7%	3%	3%	5%
€1401 to €1500	5%	7%	3%	6%	6%	8%	6%	6%	2%	4%	5%
€1501+	17%	14%	19%	15%	15%	37%	21%	17%	6%	16%	18%
Median €	850	700	850	850	900	1350	900	1000	650	800	1000

Q27 At present, how much do you pay in rent for this property on a monthly basis?

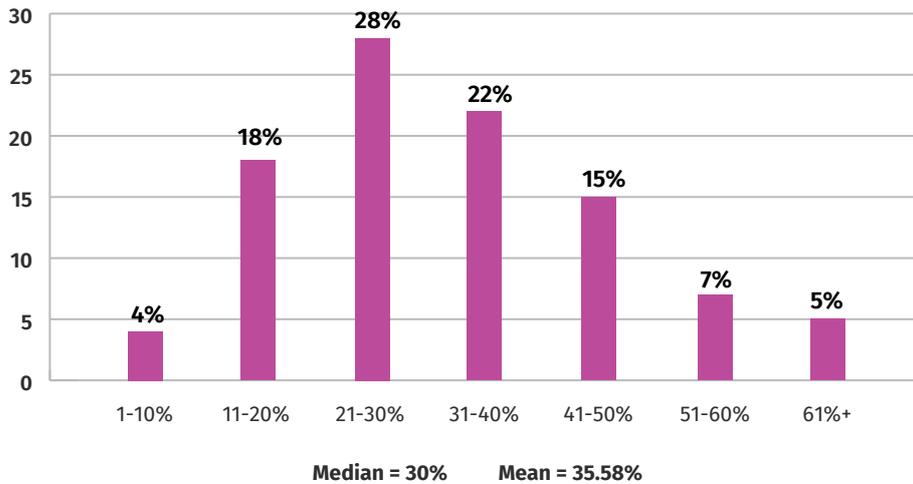
2.8.6 Percentage of Monthly Net Income Spent on Rent

Tenants were asked what percentage of their monthly net income (after tax) goes towards paying rent (excluding bills, service charges etc).

On average, tenants spent 35.58% of their monthly net income on rent. The median was 30%. Half (50% (366)) of all tenants (excluding those who said they didn't know) stated that they spent 30% or less of their monthly net income on rent. One in five (22% (157)) tenants spent 31%-40% and 28% (203) of tenants stated that they spent more than 40% of their monthly net income on rent (Figure 2.19).

Similarly, in the focus groups some tenants said that they were paying close to 50% of their take home pay to their landlord.

Figure 2.19: Q29a Percentage of monthly net income that goes towards paying rent excluding “don’t know” (n=726)



The median spend on rent as a proportion of monthly net income was higher amongst 19-24 year olds (40%) and 45+ year olds (35%), socio-economic group AB (35%) and C1 (40%), non-Irish citizens (35%), tenants living in Dublin (40%) and the Greater Dublin Area (40%).

Length of time renting was also a factor with long term renters (5+ years) spending a lower proportion of their monthly net income on rent than those renting for four years or less (Table 2.31).

Table 2.31: Q29a Percentage of monthly net income that goes towards paying rent excluding “don’t know” (n=726)

	Total (726)	Age				Social Class				Citizenship	
		19-24 (82)	25-34 (314)	35-44 (204)	45+ (126)	AB (84)	C1 (182)	C2 (219)	DE (240)	Irish Citizen (433)	Non-Irish Citizen (291)
1-10%	4%	5%	4%	4%	6%	5%	4%	2%	7%	6%	2%
11-20%	18%	17%	17%	22%	17%	15%	14%	16%	25%	22%	14%
21-30%	28%	17%	33%	26%	25%	26%	16%	33%	32%	27%	28%
31-40%	22%	19%	22%	18%	29%	31%	27%	22%	14%	22%	21%
41-50%	15%	20%	13%	19%	13%	16%	22%	10%	14%	13%	18%
51-60%	7%	14%	7%	5%	5%	2%	12%	8%	4%	6%	9%
61% or more	5%	7%	5%	6%	5%	5%	5%	9%	4%	4%	8%
Mean %	35.58	40.01	35.20	34.89	34.72	35.14	39.28	36.52	32.06	33.36	38.86
Median %	30	40	30	30	35	35	40	30	30	30	35

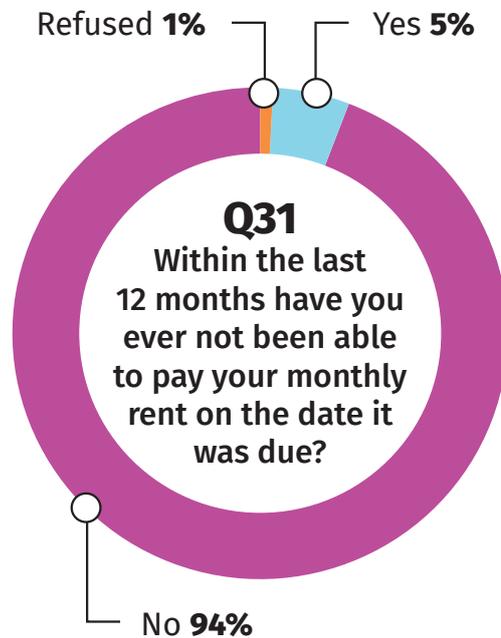
	Total (726)	Region			RPZ		Renting in Total			
		Dublin (255)	GDA (93)	Non-Dublin (471)	Non-GDA (378)	Inside RPZ (506)	Outside RPZ (220)	Renting <1yr (136)	Renting 1-4yrs (296)	Renting 5+yrs (293)
1-10%	4%	3%	1%	5%	6%	4%	6%	2%	3%	7%
11-20%	18%	6%	18%	25%	27%	14%	29%	12%	11%	29%
21-30%	28%	27%	17%	28%	31%	27%	30%	27%	25%	31%
31-40%	22%	26%	28%	19%	17%	24%	16%	25%	25%	16%
41-50%	15%	21%	14%	12%	12%	16%	12%	18%	18%	11%
51-60%	7%	10%	7%	6%	5%	8%	5%	6%	11%	4%
61% or more	5%	7%	16%	4%	1%	7%	2%	10%	7%	2%
Mean %	35.58	40.43	41.15	32.94	30.92	37.71	30.68	39.00	39.26	30.27
Median %	30	40	40	30	30	35	25	35	40	30

Q29a Roughly speaking, what percentage of your monthly net income (income after tax) goes towards paying your rent on a monthly basis (excluding bills, service charges etc.)?

2.8.7 Ability to Pay Monthly Rent

The survey results indicated that the vast majority (94% (980)) of tenants were able to pay their monthly rent on the date it was due. A small minority (5% (48)) of tenants stated that were unable to pay their monthly rent on the date it was due in the last 12 months since being surveyed (Figure 2.20).

Figure 2.20: Q31 Whether ever not able to pay monthly rent on due date within the last 12 months (n=1,038)



This finding was consistent across the different demographic groups (Table 2.32). However, tenants living outside rent pressure zones were more likely to have experienced difficulty paying their monthly rent on the due date than tenants living inside rent pressure zones (8% (25) vs 3% (23)).

Table 2.32: Q31 Whether ever not able to pay monthly rent on due date within the last 12 months (n=1,038)

	Total	Age				Social Class				Citizenship	
	(1038)	19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Yes	5%	6%	4%	6%	4%	3%	5%	4%	6%	5%	4%
No	94%	94%	95%	93%	96%	97%	95%	96%	92%	94%	95%
Refused	1%	0	1%	1%	*	0	*	*	2%	1%	1%

	Total	Region				RPZ		Renting in Total		
	(1038)	Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Yes	5%	2%	2%	6%	7%	3%	8%	6%	5%	4%
No	94%	97%	97%	93%	92%	96%	91%	93%	95%	95%
Refused	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%

Q31 Within the last 12 months have you ever not been able to pay your monthly rent on the date it was due?

2.8.8 Rent Level When Surveyed vs When First Moved in

Respondents were asked if their current rent was higher than when they first moved into the property.

One in four (25% (257)) private tenants stated that their rent was higher when surveyed than when they first moved into their current property (Table 2.33).

Table 2.33: Q33 Whether rent today is higher than when first moved in (n=1,038)

	Total	Age				Social Class				Citizenship	
	(1038)	19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Yes	25%	13%	23%	30%	30%	27%	18%	26%	28%	25%	25%
No	75%	87%	77%	70%	70%	73%	82%	74%	72%	75%	75%

	Total	Region				RPZ		Renting in Total		
	(1038)	Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Yes	25%	24%	30%	25%	24%	26%	21%	5%	19%	40%
No	75%	76%	70%	75%	76%	74%	79%	95%	81%	60%

Q33 Is your rent today higher than when you first moved into this property?

Figure 2.21 sets out the difference in rent now vs when tenants first moved in.

Amongst those tenants who claimed that their rent was higher than when they first moved in, the median rent increase was €120. Nearly half (49% (126)) of this cohort stated that their rent was up to €100 higher. One in four (25% (64)) stated that their rent was €101-€200 higher and a similar proportion (25% (66)) stated that their rent was higher by €201 or more.

Figure 2.21: Q34 Difference in rent now vs when first moved in, excluding tenants whose rent was not higher than when first moved in (n=257)

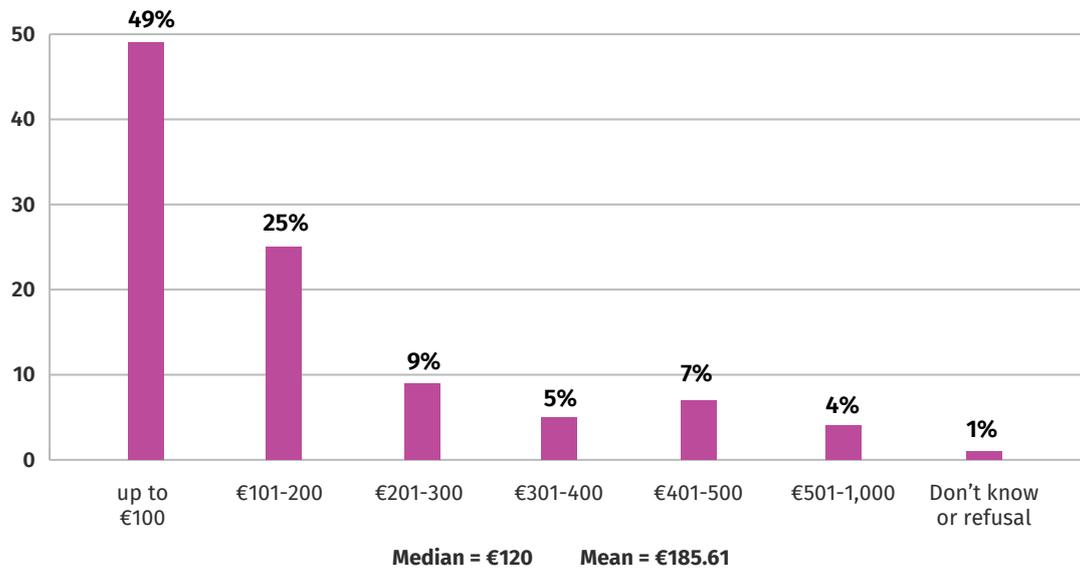


Table 2.34 indicates that the median rent increase was highest in Dublin (€200) and within rent pressure zones (€150). Older tenants (aged 35+) claimed a higher median rent increase (€150) than younger tenants aged 19-34 (€100) as did long term renters (5+ years).

Table 2.34: Q34 Difference in rent now vs when first moved in, excluding tenants whose rent was not higher than when first moved in (n=257)

	Total (257)	Age				Social Class				Citizenship	
		19-24 (18)*	25-34 (102)	35-44 (84)	45+ (53)	AB (34)*	C1 (53)	C2 (72)	DE (98)	Irish Citizen (157)	Non-Irish Citizen (98)
Up to €100	49%	58%	54%	41%	50%	29%	45%	47%	60%	51%	46%
€101 to €200	25%	21%	26%	23%	26%	29%	23%	27%	23%	23%	29%
€201 to €300	9%	0	9%	12%	8%	7%	15%	9%	7%	11%	7%
€301 to €400	5%	6%	2%	7%	7%	9%	6%	4%	5%	5%	5%
€401 to €500	7%	10%	4%	10%	7%	22%	7%	6%	2%	8%	6%
€501 to €1000	4%	6%	3%	5%	2%	4%	4%	5%	3%	3%	5%
DK or Refusal	1%	0	2%	0	0	0	0	1%	1%	0	2%
Mean €	185.61	177.01	159.73	223.21	178.16	255.61	189.44	202.69	146.43	182.51	191.66
Median €	120	100	100	150	150	190	125	150	100	100	125

	Total (257)	Region				RPZ		Renting in Total		
		Dublin (98)	GDA (30)*	Non-Dublin (158)	Non GDA (128)	Inside RPZ (194)	Outside RPZ (63)	Renting <1 yr (10)*	Renting 1-4yrs (79)	Renting 5+yrs (167)
Up to €100	49%	32%	44%	60%	63%	44%	65%	54%	55%	46%
€101 to €200	25%	25%	25%	25%	25%	25%	25%	30%	26%	24%
€201 to €300	9%	9%	25%	9%	6%	11%	3%	0	9%	10%
€301 to €400	5%	10%	0	2%	3%	6%	2%	0	3%	7%
€401 to €500	7%	15%	6%	2%	1%	9%	2%	10%	4%	8%
€501 to €1000	4%	8%	0	1%	1%	4%	3%	7%	3%	4%
DK or Refusal	1%	0	0	1%	2%	1%	0	0	1%	1%
Mean €	185.61	265.70	174.81	135.14	125.56	205.06	126.17	167.84	152.61	202.17
Median €	120	200	158	100	100	150	100	100	100	150

*Caution: low base

Q34 Roughly speaking, how much higher is your rent now, compared to when you first moved in?

2.8.9 Most Recent Rent Increase

Amongst those tenants who stated that their rent was higher than when they first moved in, the majority (54% (137)) said that their landlord increased their rent within the last 12 months of being surveyed. One in four (26% (68)) said that their rent was increased 12-24 months before being surveyed and 15% (40) said that their rent was increased 2+ years before being surveyed. The remainder (5% (12)) did not know the last time the landlord increased their rent (Figure 2.22).

Figure 2.22: Q35a Recency of last rent increase, excluding tenants whose rent was not higher than when first moved in (n=257)

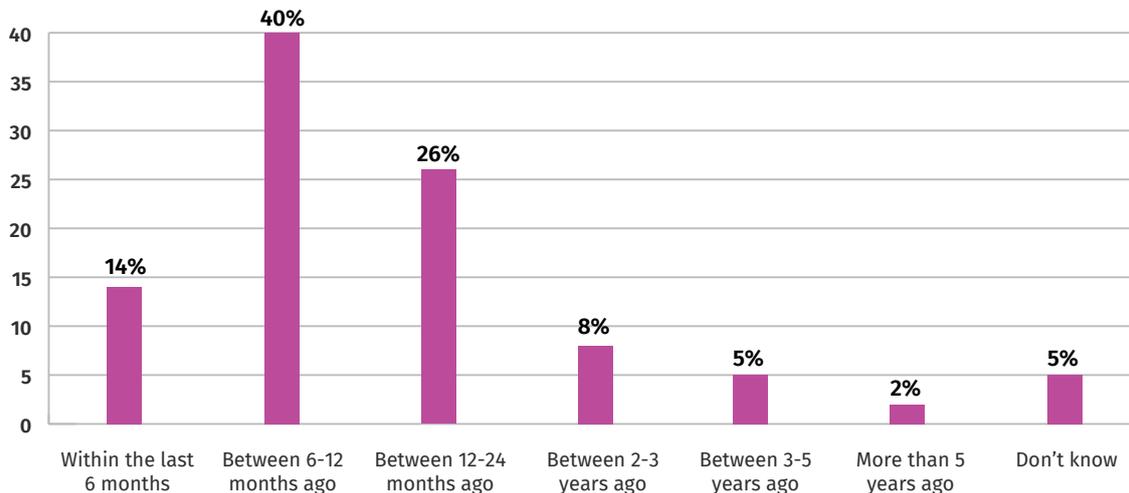


Table 2.35 shows that tenants living in Dublin were more likely to have had their rent increased within the last 12 months than tenants living outside the capital (61% (61) vs 49% (77)).

Table 2.35: Q35a Recency of last rent increase, excluding tenants whose rent was not higher than when first moved in (n=257)

	Total (257)	Age				Social Class				Citizenship	
		19-24 (18)*	25-34 (102)	35-44 (84)	45+ (53)	AB (34)*	C1 (53)	C2 (72)	DE (98)	Irish Citizen (157)	Non-Irish Citizen (98)
Within the last 6 months	14%	22%	14%	18%	2%	17%	16%	15%	10%	12%	15%
Between 6-12 months ago	40%	23%	49%	32%	40%	44%	52%	35%	35%	42%	37%
Between 12-24 months ago	26%	38%	22%	22%	38%	17%	20%	26%	33%	25%	28%
Between 2-3 years ago	8%	5%	7%	10%	8%	7%	5%	11%	8%	7%	11%
Between 3-5 years ago	5%	0	1%	9%	11%	6%	1%	7%	6%	6%	5%
More than 5 year ago	2%	0	2%	3%	1%	0	0	1%	4%	3%	0
Don't know	5%	12%	5%	6%	0	9%	6%	4%	3%	6%	3%

	Total (257)	Region				RPZ		Renting in Total		
		Dublin (98)	GDA (30)*	Non-Dublin (158)	Non-GDA (128)	Inside RPZ (194)	Outside RPZ (63)	Renting <1 yr (10)*	Renting 1-4yrs (79)	Renting 5+yrs (167)
Within the last 6 months	14%	15%	17%	13%	12%	17%	4%	32%	18%	10%
Between 6-12 months ago	40%	46%	38%	36%	35%	38%	45%	50%	47%	36%
Between 12-24months ago	26%	25%	14%	28%	31%	24%	35%	0	28%	27%
Between 2-3 years ago	8%	6%	0	9%	12%	9%	6%	0	3%	11%
Between 3-5 years ago	5%	3%	20%	7%	4%	6%	2%	0	0	8%
More than 5 year ago	2%	0	10%	3%	1%	2%	2%	0	0	3%
Don't know	5%	5%	0	5%	6%	4%	6%	18%	5%	4%

*Caution: low base

Q35a When was the last time your landlord increased your rent?

Tenants who stated that their rent was higher than when they first moved in were asked how much their rent increased by at their most recent rent review.

The median rent increase at the most recent rent review was €70 (Figure 2.23).

Figure 2.23: Q35b Rent increase at most recent rent review, excluding tenants whose rent was not higher than when first moved in (n=243)



Table 2.36 below indicates that the median rent increase at the most recent rent review was highest amongst 35-44 year olds (€100) and in Dublin (€100). Tenants living inside rent pressure zones were given a higher rent increase than tenants living outside rent pressure zones (€80 vs €50).

Table 2.36: Q35b Rent increase at most recent rent review, excluding tenants whose rent was not higher than when first moved in (n=243)

	Total (243)	Age				Social Class				Citizenship	
		19-24 (17)*	25-34 (94)	35-44 (79)	45+ (53)	AB (29)*	C1 (50)	C2 (71)	DE (93)	Irish Citizen (153)	Non-Irish Citizen (89)
€1 to 50	45%	54%	53%	36%	45%	32%	44%	49%	49%	45%	48%
€51 to 100	32%	28%	29%	35%	32%	16%	35%	35%	32%	33%	28%
€101 to 500	21%	12%	17%	27%	21%	49%	21%	13%	18%	21%	21%
€501+	2%	6%	*	2%	2%	3%	0	3%	1%	1%	3%
Mean €	105.73	117.53	87.23	126.26	104.42	175.36	91.81	100.72	95.19	105.44	106.31
Median €	70	50	50	100	70	103	75	51	75	75	60

	Total (243)	Region				RPZ		Renting in Total		
		Dublin (89)	GDA (30)*	Non-Dublin (154)	Non GDA (124)	Inside RPZ (182)	Outside RPZ (62)	Renting <1 yr (9)*	Renting 1-4 yrs (73)	Renting 5+ yrs (160)
€1 to 50	45%	27%	46%	56%	58%	40%	60%	42%	44%	46%
€51 to 100	32%	29%	43%	33%	31%	33%	29%	12%	34%	32%
€101 to 500	21%	39%	11%	11%	11%	25%	11%	42%	20%	20%
€501+	2%	5%	0	0	0	2%	0	4%	1%	2%
Mean €	105.73	165.15	77.04	71.27	69.86	120.45	62.75	159.34	108.32	101.44
Median €	70	100	70	50	50	80	50	100	70	60

*Caution: low base

Q35b At your most recent rent review, how much did your rent increase by?

2.8.10 Rent Pressure Zones

A Rent Pressure Zone (RPZ) is a designated area where rents cannot be increased by more than 4% per annum. This applies to new and existing tenancies (unless an exemption is being applied). Rent Pressure Zones are located in parts of the country where rents are highest and rising and where households have the greatest difficulty finding affordable accommodation.

In this section of the survey, respondents were asked if they know what an RPZ is and whether their current rental property is located within a rent pressure zone.

Awareness of rent pressure zones is low overall - 37% (382) of all tenants stated that they know what a rent pressure zone is (Figure 2.24).

Figure 2.24: Awareness of a Rent Pressure Zone (n=1,038)



This result is somewhat surprising given that 71% (732) of tenants were renting inside a rent pressure zone when they were surveyed. Amongst this group, awareness of rent pressure zones was 41% (303).

The greatest awareness of rent pressure zones was amongst socio-economic group AB (52% (66)) and in the Greater Dublin Area (50% (51)). The lowest levels of awareness were recorded amongst 19-24 year olds (25% (35)), socio-economic group DE (25% (89)), those living outside rent pressure zones (26% (79)) and non-Irish citizens (31% (123)).

Table 2.37: Q62 Awareness of a Rent Pressure Zone (n=1,038)

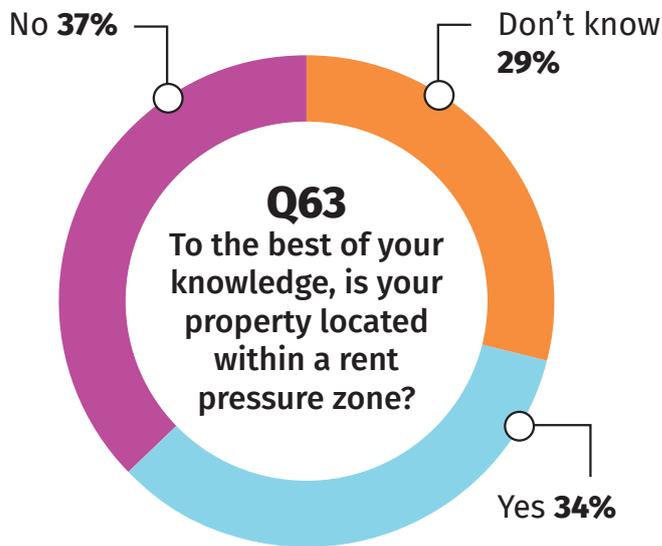
	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Yes	37%	25%	37%	41%	37%	52%	41%	40%	25%	40%	31%
No	63%	75%	63%	59%	63%	48%	59%	60%	75%	60%	69%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1 yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Yes	37%	40%	50%	35%	32%	41%	26%	32%	41%	34%
No	63%	60%	50%	65%	68%	59%	74%	68%	59%	66%

Q62 Do you know what a Rent Pressure Zone is?

When asked if their rental property was located within a rent pressure zone, one third (34% (355)) of tenants answered 'yes'. A slightly higher proportion (37% (387)) answered 'no' and 29% (296) didn't know (Figure 2.25).

Figure 2.25: Q63 Whether property is located in a rent pressure zone (n=1,038)



Amongst those living inside a rent pressure zone, 42% (306) said that their property is located in a rent pressure zone. Approximately one third (35% (258)) said that their property is not located in a rent pressure zone to the best of their knowledge and the remainder (23% (168)) don't know (Table 2.38).

Interestingly, 16% (49) of tenants stated that their property is located inside a rent pressure zone when they are currently renting outside of a rent pressure zone.

Table 2.38: Q63 Whether property is located in a rent pressure zone (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Yes	34%	29%	35%	36%	34%	57%	44%	29%	22%	34%	34%
No	37%	37%	37%	38%	37%	21%	31%	43%	43%	40%	33%
Don't know	29%	33%	28%	26%	29%	21%	25%	28%	35%	26%	33%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Yes	34%	49%	37%	24%	22%	42%	16%	28%	44%	27%
No	37%	34%	29%	39%	41%	35%	42%	34%	32%	44%
Don't know	29%	17%	35%	36%	36%	23%	42%	38%	24%	29%

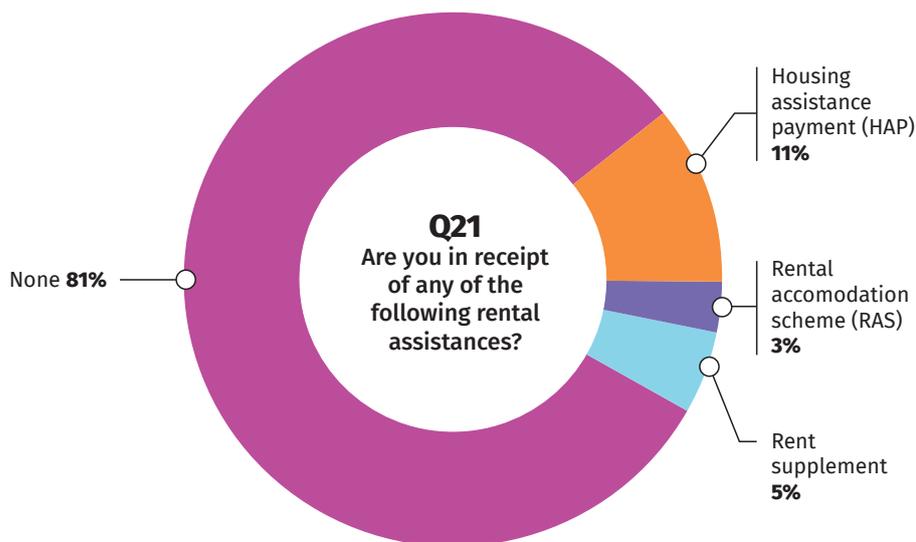
Q63 To the best of your knowledge, is your property located within a rent pressure zone?

2.8.11 Rental Assistance

Tenants were asked whether they were in receipt of any rental assistance.

The survey results indicated that 19% (202) of all tenants were in receipt of rental assistance. One in ten (11% (112)) stated that they were in receipt of Housing Assistance Payment (HAP). A further 5% (56) were in receipt of Rent Supplement and 3% (34) were on the Rental Accommodation Scheme (Figure 2.26).

Figure 2.26: Q21 Whether in receipt of any rental assistances (n=1,038)



Amongst those tenants belonging to socio-economic group DE, 24% (82) stated that they were in receipt of the HAP payment. Older tenants age 45+ and those renting 5+ years were also more likely to be in receipt of rental assistance (Table 2.39).

Table 2.39: Q21 Whether in receipt of any rental assistances (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Housing assistance payment (HAP)	11%	9%	9%	14%	11%	7%	3%	5%	24%	13%	8%
Rental accommodation scheme (RAS)	3%	0	3%	4%	4%	1%	1%	1%	8%	4%	1%
Rent supplement	5%	3%	5%	4%	11%	0	1%	3%	13%	6%	5%
None	81%	88%	83%	78%	74%	93%	95%	92%	55%	77%	86%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1 yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Housing assistance payment (HAP)	11%	6%	8%	14%	15%	8%	17%	5%	10%	14%
Rental accommodation scheme (RAS)	3%	2%	0	4%	5%	2%	6%	1%	2%	5%
Rent supplement	5%	4%	15%	6%	5%	5%	5%	4%	3%	8%
None	81%	88%	77%	76%	76%	84%	72%	90%	85%	72%

Q21 Are you in receipt of any of the following rental assistances?

Tenants in receipt of rental assistance were asked if they pay a top-up payment to their landlord to cover the difference between their rental assistance and the cost of their rent.

Amongst those tenants in receipt of rental assistance, two-thirds (66% (132)) state that they pay a top-up payment to their landlord to cover the difference between their rental assistance and the cost of their rent (Figure 2.27).

Figure 2.27: Q23 Whether pay a top up payment to cover difference between rental assistance and the cost of rent excluding tenants who were not in receipt of rental assistance (n=202)



Table 2.40 shows that amongst those in receipt of rental assistance, the incidence of paying a top-up payment was higher among non-Irish citizens (84% (47)) vs Irish citizens (59% (85)). It was also higher outside rent pressure zones vs inside rent pressure zones (75% (63) vs 59% (69)).

Table 2.40: Q23 Whether pay a top up payment to cover difference between rental assistance and the cost of rent excluding tenants who were not in receipt of rental assistance (n=202)

	Total (202)	Age				Social Class				Citizenship	
		19-24 (16)*	25-34 (77)	35-44 (62)	45+ (46)*	AB (9)*	C1 (15)*	C2 (22)*	DE (155)	Irish Citizen (145)	Non-Irish Citizen (56)
Yes	66%	73%	65%	68%	59%	100%	56%	76%	63%	59%	84%
No	34%	27%	35%	32%	41%	0	44%	24%	37%	41%	16%

	Total (202)	Region				RPZ		Renting in Total		
		Dublin (49)*	GDA (23)*	Non-Dublin (152)	Non-GDA (129)	Inside RPZ (118)	Outside RPZ (84)	Renting <1 yr (20)*	Renting 1-4yrs (66)	Renting 5+yrs (116)
Yes	66%	50%	39%	71%	76%	59%	75%	70%	74%	60%
No	34%	50%	61%	29%	24%	41%	25%	30%	26%	40%

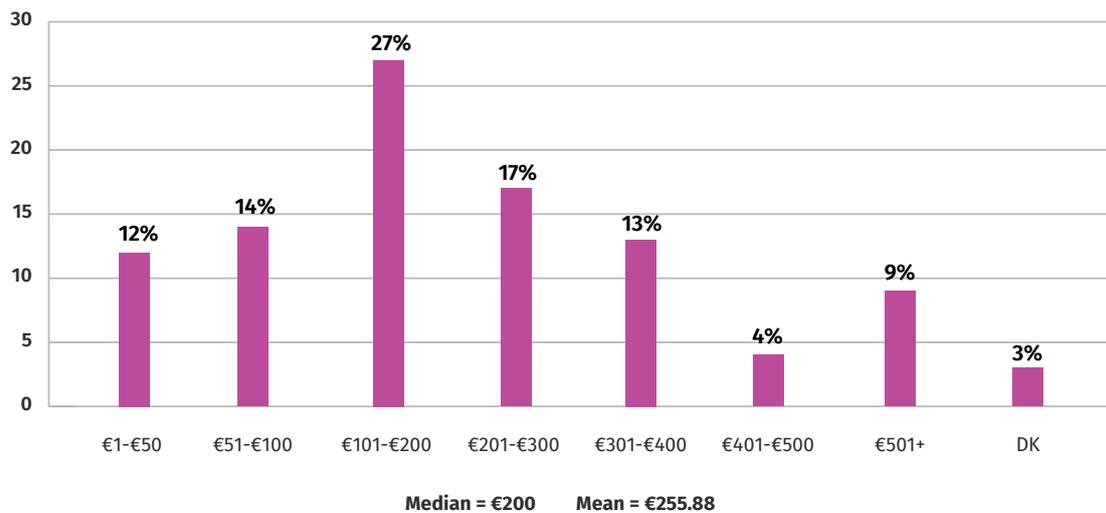
* Caution: low base

Q23 Do you pay a top up payment to your landlord to cover the difference between your rental assistance and the cost of your rent?

Figure 2.28 sets out the amount paid as a top-up by those tenants who stated that they were in receipt of rental assistance and pay a top-up payment.

The results indicate that the median amount paid as a top-up was €200. Approximately one in four (26% (35)) tenants paid up to €100 as a top-up and a similar proportion (27% (36)) paid €101-€200. One third (34% (45)) paid a monthly top-up amount of between €201-€500. The top-up payment exceeded €500 for 9% (12) of tenants.

Figure 2.28: Q24 Amount paid as a top-up (n=132)



Tenants living inside a rent pressure zone paid a higher median top-up (€250) compared to those living outside a rent pressure zone (€150).

Table 2.41: Q24 Amount paid as a top-up (n=132)

	Total (132)	Region				RPZ		Renting in Total		
		Dublin (24)*	GDA (9)*	Non-Dublin (108)	Non GDA (98)	Inside RPZ (69)	Outside RPZ (63)	Renting <1 yr (14)*	Renting 1-4yrs (48)*	Renting 5+ yrs (69)
€1 to €50	12%	3%	0	14%	16%	14%	10%	10%	13%	12%
€51 to €100	14%	1%	8%	17%	18%	5%	25%	24%	14%	12%
€101 to €200	27%	15%	11%	30%	32%	24%	32%	7%	23%	35%
€201 to €300	17%	20%	26%	17%	16%	22%	12%	26%	12%	19%
€301 to €400	13%	19%	8%	12%	12%	11%	15%	27%	12%	11%
€401 to €500	4%	4%	20%	4%	2%	6%	2%	0	4%	5%
€501+	9%	30%	16%	4%	3%	14%	3%	0	17%	5%
DK	3%	8%	10%	2%	1%	4%	1%	7%	4%	1%
Mean €	255.88	503.62	401.36	203.12	186.39	316.12	191.87	213.22	318.88	221.64
Median €	200	400	300	150	140	250	150	250	200	171

* Caution: low base

Q24 And how much do you pay as a top-up? Enter amount in euro.

2.8.12 Rating of Rental Experience

Respondents were asked to rate their experience of renting their current property, of renting in their current neighbourhood and of living in the private rental sector in general. The results of these questions are set out in Figure 2.29 below.

Overall, the tenant’s experience of renting and living in the private rental sector was positive.

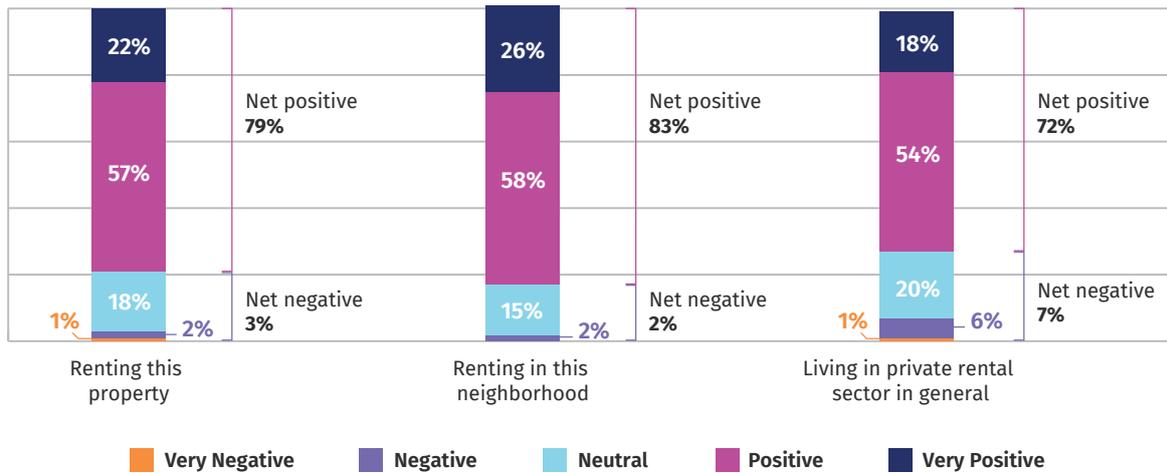
More than three in four were ‘positive/very positive’ about renting their current property (79% (817)) and renting in their current neighbourhood (83% (862)). Tenants were slightly less positive about their experience of living in the private rental sector in general (72% (746) rated ‘positive/very positive’).

The majority rated their experience 'positive' rather than 'very positive' indicating that the rental experience could be improved.

However, the level of dissatisfaction was very low overall. Only 3% (35) were 'negative/very negative' about renting their current property and 2% (21) were 'negative/very negative' about renting in their current neighbourhood. Fewer than one in ten (8% (80)) were 'negative/very negative' about living in the private rental sector in general.

The findings were similar in the tenant focus groups where the majority described their landlord/agent relationship in positive rather than neutral terms.

Figure 2.29: Q70a/b/c Rating of overall experience of renting this property, renting in this neighbourhood and living in the private rental sector in general (n=1,038)



The response to these questions was similar across most demographic groups.

The experience of non-Irish citizens appeared to be more positive than that of Irish citizens, not only with their current property and neighbourhood but with renting in the private rental sector in general (Table A1.1-A1.3 in Appendix I).

2.9 Motivations for Renting and Future Intentions

This section of the survey asked questions about motivations for renting and where respondents see themselves living in the future.

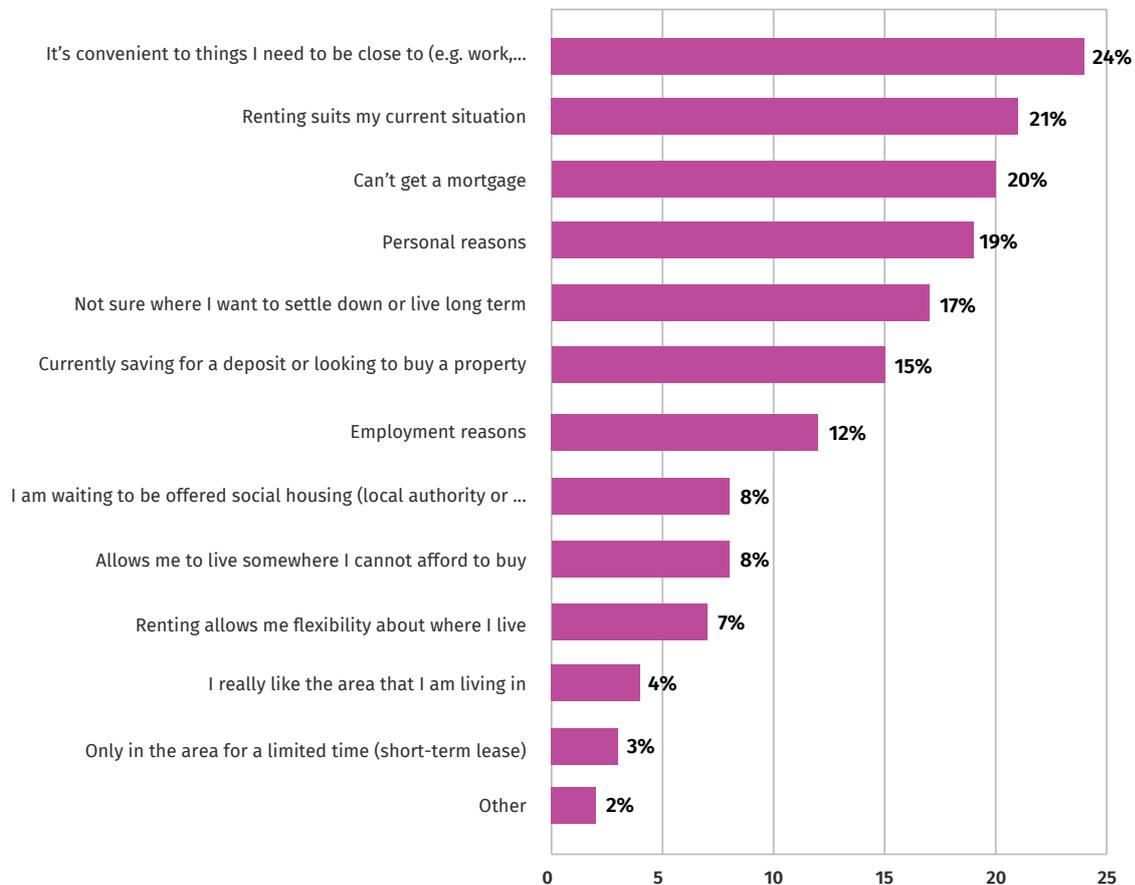
2.9.1 Motivations for Renting

Respondents were prompted with a list of reasons for currently renting and asked to choose which reason(s) applied. The results are set out in Figure 2.30 below.

Convenience was the main reason given with 24% (245) saying 'it's convenient to things I need to be close to (e.g. work, college, schools)'. However, flexibility was also a key factor with 21% (215) saying 'renting suits my current situation' and 7% (75) saying that 'renting allows me flexibility about where I live'. A similar proportion (20% (212)) were renting because they 'can't get a mortgage' and 15% (153) were 'currently saving for a deposit or looking to buy a property'. One in five (19% (202)) tenants also cited 'personal reasons' for currently renting and a similar proportion (17% (175)) said they were 'not sure where I want to settle down or live long term'. Fewer than one in ten (8% (85)) were renting while they were 'waiting to be offered social housing'.

From the qualitative focus groups, it was clear that the majority of tenants would like to own their own property and a minority are clearly on their way to achieving that goal.

Figure 2.30: Q39 Reasons for currently renting (n=1,038)



Convenience was the main reason (31% (42)) given by 19-24 year olds who were also twice as likely as the average (6% (9) vs 3% (34)) to say they were 'only in the area for a limited time (short-term lease)'.

'Personal reasons' were the main reason (26% (46)) given by the older age cohort 45+ for currently renting.

Motivations for renting also varied by socio-economic group and region. More than a third (34% (42)) of tenants belonging to socio-economic group AB said they were 'not sure where I want to settle down or live long term'. This was double the sample average (17% (175)). For socio-economic group C1 convenience was the main factor (33% (97)).

Amongst the lower socio-economic groups C2 and DE, the fact that they 'can't get a mortgage' was the main reason for renting (25% (69) and 29% (102) respectively). One fifth (22% (61)) of tenants belonging to socio-economic group C2 were 'currently saving for a deposit or looking to buy a property'. A similar proportion (19% (66)) of socio-economic group DE were 'waiting to be offered social housing'.

Convenience was a key driver for one third (32% (170)) of tenants living outside of the Greater Dublin Area. Amongst those renting in the Greater Dublin Area, 37% (38) said they 'can't get a mortgage' and 25% (25) of this group were 'currently saving for a deposit or looking to buy a property'.

Among long term renters (5+ yrs), 24% (97) were renting for 'personal reasons' and a similar proportion (27% (113)) stated that they 'can't get a mortgage' (Table 2.42).

Table 2.42: Q39 Reasons for currently renting (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
It's convenient to things I need to be close to (e.g. work, college, Schools)	24%	31%	24%	23%	20%	17%	33%	22%	19%	23%	25%
Renting suits my current situation	21%	17%	22%	20%	20%	14%	21%	17%	26%	20%	22%
Can't get a mortgage	20%	16%	20%	23%	21%	8%	11%	25%	29%	21%	20%
Personal reasons	19%	12%	18%	21%	26%	20%	19%	19%	20%	22%	15%
Not sure where I want to settle down or live long term	17%	20%	19%	14%	15%	34%	16%	14%	14%	14%	21%
Currently saving for a deposit or looking to buy a property	15%	9%	18%	16%	10%	20%	19%	22%	4%	17%	11%
Employment reasons	12%	11%	13%	9%	12%	14%	11%	14%	10%	11%	13%
I am waiting to be offered social housing (local authority or voluntary body)	8%	7%	7%	10%	10%	2%	*	6%	19%	10%	6%
Allows me to live somewhere I cannot afford to buy	8%	6%	9%	7%	8%	6%	5%	6%	11%	7%	8%
Renting allows me flexibility about where I live	7%	5%	8%	8%	6%	5%	5%	8%	9%	6%	10%
I really like the area that I am living in	4%	2%	5%	4%	4%	3%	3%	3%	6%	4%	4%
Only in the area for a limited time (short-term lease)	3%	6%	3%	2%	4%	2%	5%	2%	3%	3%	4%
Other, specify	2%	3%	1%	2%	4%	0%	1%	1%	4%	3%	1%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
It's convenient to things I need to be close to (e.g. work, college, Schools)	24%	14%	17%	30%	32%	24%	23%	26%	23%	23%
Renting suits my current situation	21%	7%	18%	30%	32%	14%	36%	24%	18%	22%
Can't get a mortgage	20%	15%	37%	24%	22%	20%	22%	13%	17%	27%
Personal reasons	19%	21%	15%	18%	19%	21%	16%	17%	17%	24%
Not sure where I want to settle down or live long term	17%	24%	11%	12%	12%	19%	11%	21%	17%	15%
Currently saving for a deposit or looking to buy a property	15%	17%	25%	13%	11%	16%	11%	14%	17%	13%
Employment reasons	12%	10%	18%	12%	11%	13%	9%	15%	13%	9%
I am waiting to be offered social housing (local authority or voluntary body)	8%	2%	12%	12%	12%	6%	13%	4%	5%	13%
Allows me to live somewhere I cannot afford to buy	8%	4%	7%	10%	11%	6%	11%	10%	6%	8%
Renting allows me flexibility about where I live	7%	1%	7%	11%	12%	4%	16%	5%	5%	10%
I really like the area that I am living in	4%	2%	1%	5%	6%	3%	6%	5%	3%	5%
Only in the area for a limited time (short- term lease)	3%	2%	2%	4%	4%	3%	3%	8%	2%	2%
Other, specify	2%	1%	2%	3%	3%	1%	4%	2%	2%	2%

Q39 Please tell me the reasons you are currently renting?

2.9.2 Future Intentions

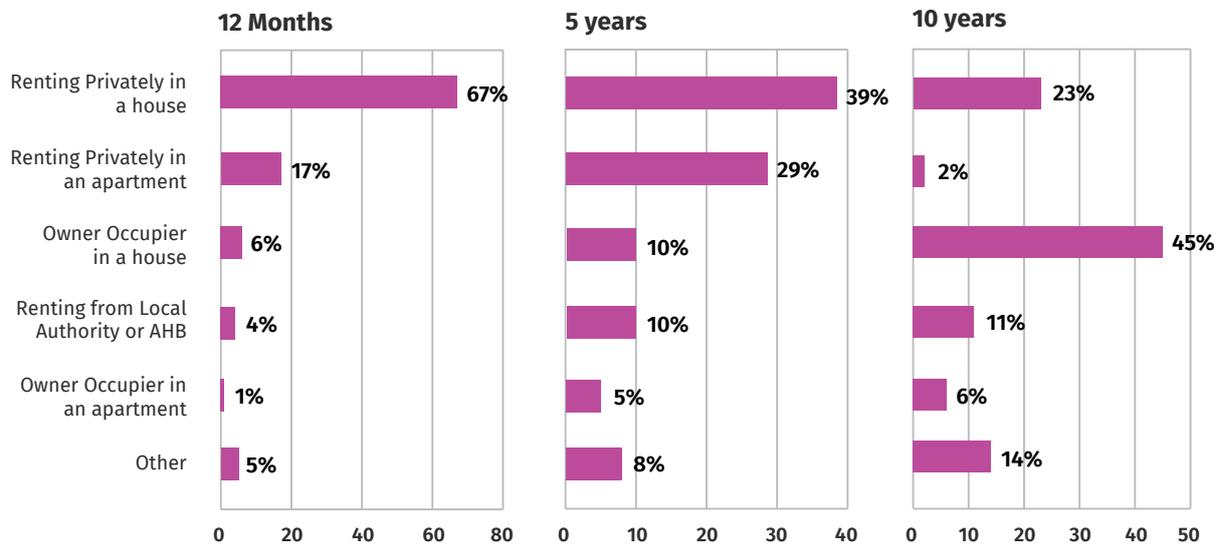
In this section, respondents were asked where they saw themselves living in the future. The results are set out in Figure 2.31 below.

In 12 months' time, 84% (838) of tenants saw themselves renting privately in either a house or an apartment. A total of 7% (70) thought they would become an owner occupier (house/apartment) during this period and 4% (43) saw themselves renting from Local Authority or Approved Housing Body (AHB).

In five years' time, 49% (488) saw themselves renting privately in either a house or an apartment. More than one third (34% (336)) thought they would become an owner occupier (house/apartment) during this period. The proportion who saw themselves renting from Local Authority or AHB also increased during this period (up to 10% (95)).

In 10 years' time, 25% (254) saw themselves renting privately in either a house or an apartment. Half (50% (503)) of all tenants thought they would become an owner occupier (house/apartment) during this period. The proportion who saw themselves renting from Local Authority or AHB remained more or less the same at 11% (105).

Figure 2.31: Q40a1 Where tenants see themselves living (997)



Tenants who saw themselves renting from a Local Authority or Approved Housing Body in 12 months/5 years/10 years' time were asked if they were currently on a waiting or transfer list for Local Authority or Approved Housing Body accommodation.

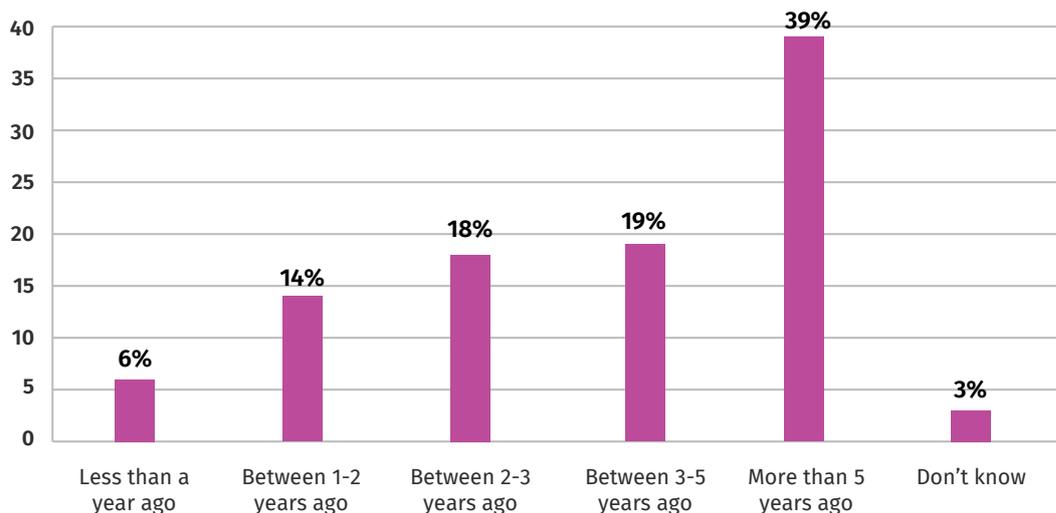
A total of 82% (95) said they were currently on a waiting or transfer list as indicated in Figure 2.32 below.

Figure 2.32: **Q40b1 Whether currently on a waiting or transfer list for Local Authority or Approved Housing Body accommodation excluding tenants who did not see themselves renting from Local Authority or AHB in next 12 months/5 yrs/10 yrs (n=117)**



Amongst those tenants currently on a waiting or transfer list for Local Authority or Approved Housing Body accommodation, 76% (72) first applied two or more years ago and 39% (37) applied more than five years ago (Figure 2.33).

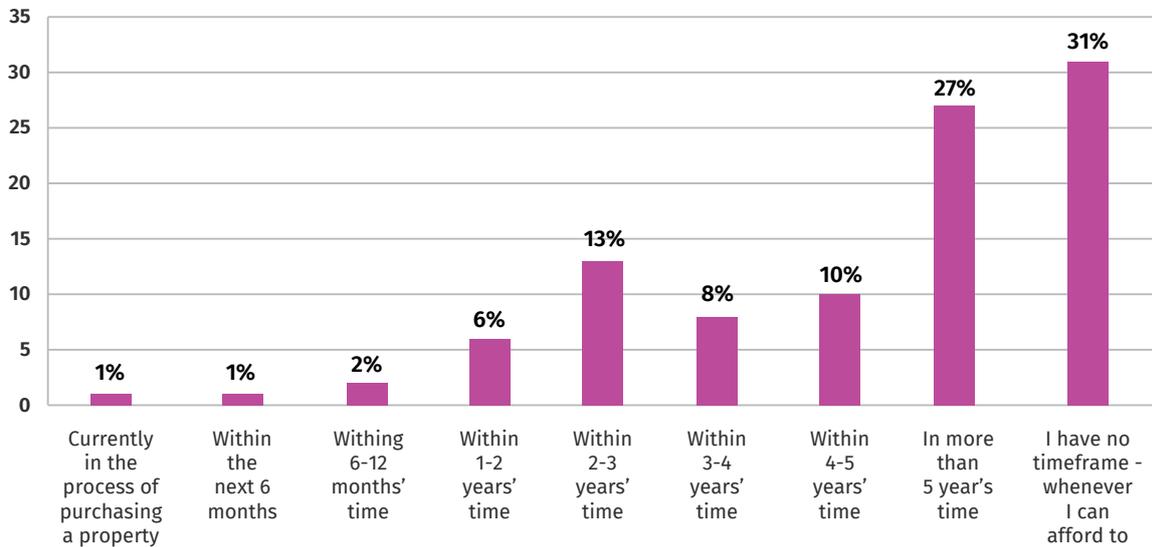
Figure 2.33: **Q40b2 Recency of first applying for social housing excluding tenants not currently on a waiting or transfer list (n=95)**



Tenants who saw themselves being an owner occupier in a house or apartment in 12 months/5 years/10 years were asked when they believed they would purchase a property. The results are set out in Figure 2.34 below.

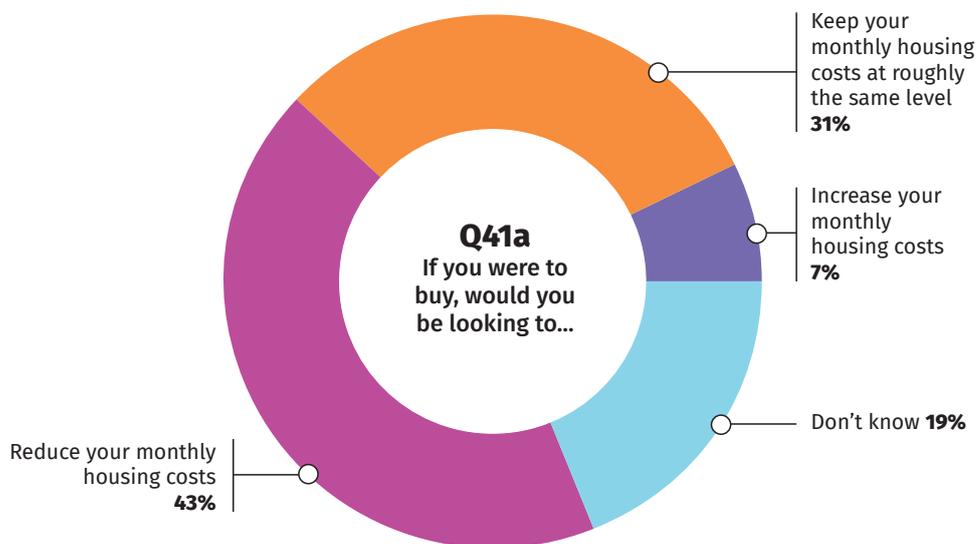
A small minority (4% (21)) believed that they would purchase a property within 12 months' time¹⁰. Those who believed that they would purchase a property within 5 years' time accounted for 42% (212) and 69% (351) believed that they would purchase a property within 10 years' time. Nearly one in three (31% (157)) had no timeframe on purchasing a property, rather it was 'whenever I can afford to'.

Figure 2.34: Q40c When will purchase a property excluding tenants who did not see themselves as owner occupier in 12 months/5 yrs/10 yrs (n=507)



If they were to buy 43% (219) of these tenants stated that they would be looking to reduce their monthly housing costs by becoming an owner occupier. Nearly a third (31% (157)) stated that they would be looking to keep their monthly housing costs at roughly the same level and 7% (35) felt that becoming an owner occupier would increase their monthly housing costs. Approximately one fifth (19% (97)) of tenants did not know what impact becoming an owner occupier would have on monthly housing costs (Figure 2.35).

Figure 2.35: Q41a Whether looking to reduce, increase or keep monthly housing costs the same excluding tenants who did not see themselves as owner occupier in 12 months /5 yrs/10 yrs (n=507)



¹⁰ Includes those currently in the process of purchasing a property.

Those who were more likely to be looking to reduce monthly housing costs were non-Irish citizens (52% (91)), socio-economic groups AB (49% (44) and DE (49% (42)) and tenants renting in Dublin (48% (104)).

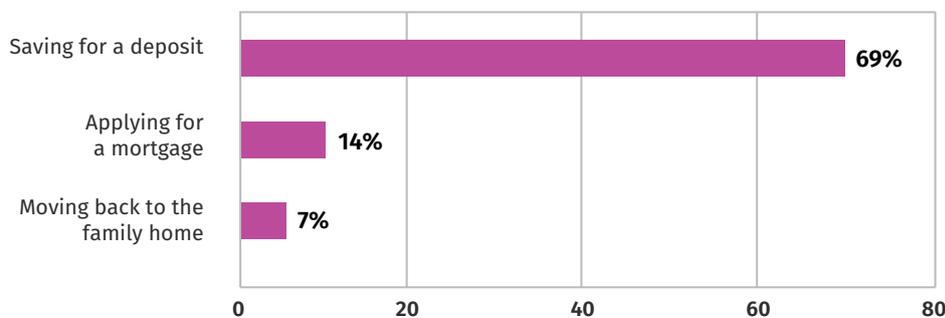
Those who were more likely to be looking to keep their monthly housing costs at roughly the same level were 35-44 year olds (37% (49)) and tenants renting outside rent pressure zones (41% (55)), as shown in Table A1.4 in Appendix I.

2.9.3 Actions Taken Towards Purchasing a Property

Tenants who saw themselves being an owner occupier in a house or apartment in 12 months/5 years/10 years were asked what actions they were taking to help achieve their goal to buy a property.

The majority (69% (349)) said they were currently saving for a deposit. Approximately one in seven (14% (70)) indicated that they were currently applying for a mortgage and 7% (34) stated that they were moving back to the family home (Figure 2.36).

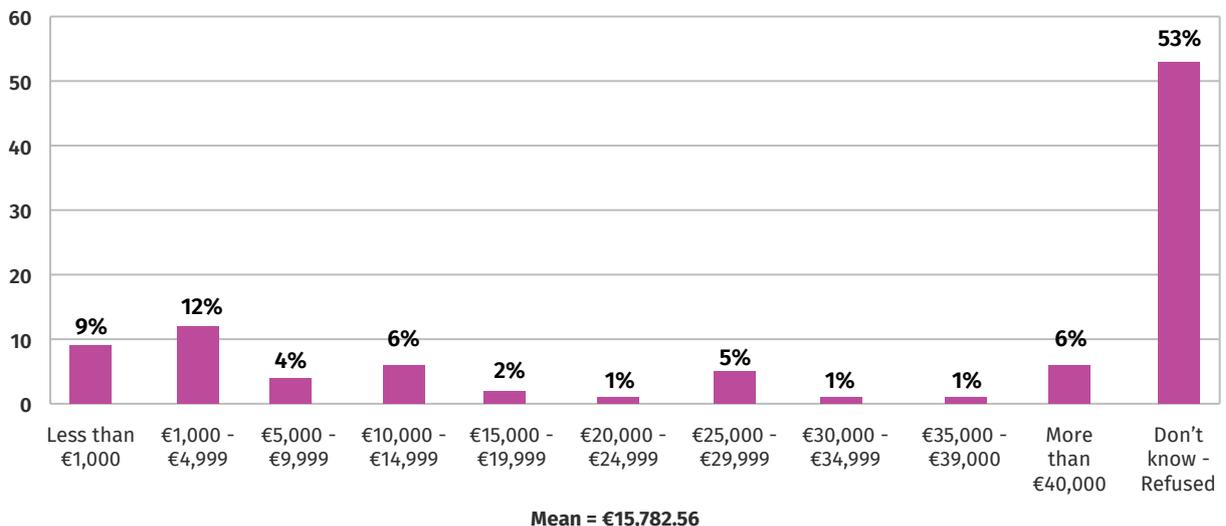
Figure 2.36: Q41b Actions currently taking to help achieve goal to buy a property excluding tenants who did not see themselves as owner occupier in 12 months/5 yrs/10 yrs (n=507)



Tenants who said that they were currently saving for a deposit were shown a card with a list of options and asked how much they had saved so far. The results are shown in Figure 2.37 below.

The average amount saved so far was €15,782.56. However, the majority (53% (186)) declined to say how much they had saved.

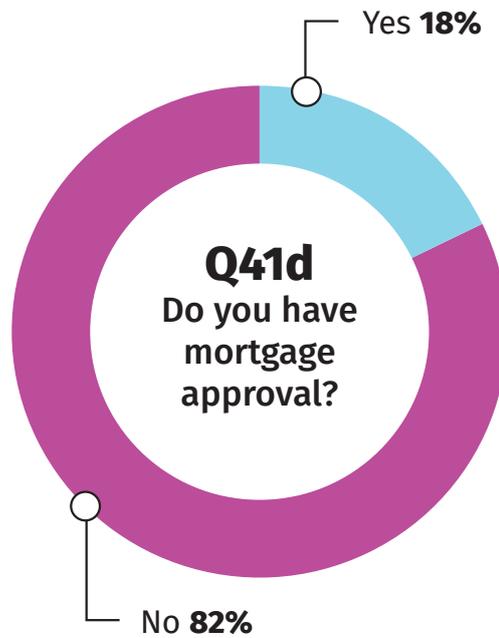
Figure 2.37: Q41c Amount saved so far excluding tenants who were not currently saving for a deposit (n=349)



The average amount saved for a deposit was highest amongst 45+ year olds (€17,474.55), socio-economic group C1 (€21,867.01), tenants renting in Dublin (€20,402.47) and short-term renters less than 1 year (€20,836.72). This is outlined in Table A1.5 in Appendix I

Amongst those who indicated that they were currently applying for a mortgage, 18% (13) claimed that they already had mortgage approval (Figure 2.38).

Figure 2.38: **Q41d Whether have mortgage approval excluding tenants who were not currently applying for a mortgage (n=70)**

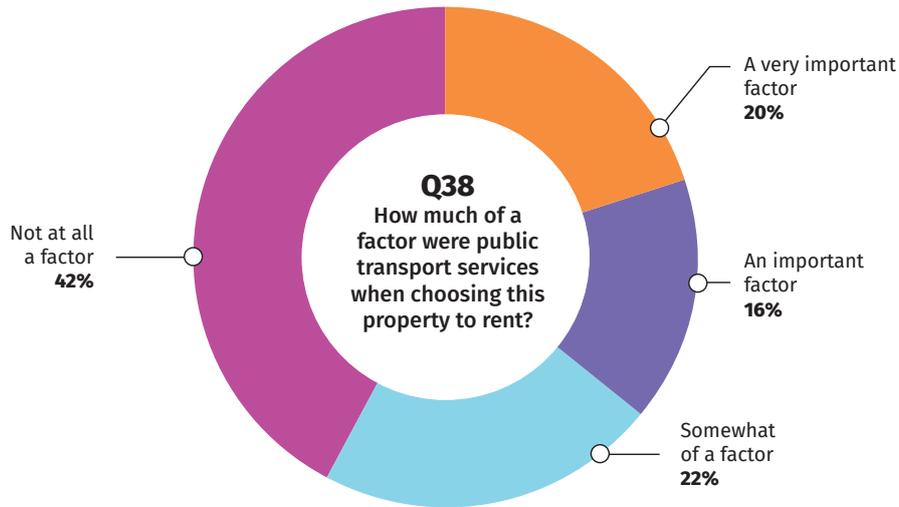


2.9.4 Importance of Transport Services

Tenants who saw themselves being an owner occupier in a house or apartment in 12 months/5 Respondents were asked to rate the importance of public transport services as a factor when choosing their current property to rent. The results are set out in Figure 2.39 below.

Public transport was a factor for the majority of private tenants with 36% (380) saying it was a 'very important/important factor' and 22% (226) saying it was 'somewhat of a factor'. For just over two fifths of the sample (42% (433)), public transport was deemed 'not a factor at all'.

Figure 2.39: **Q38 Rating of importance of public transport services when choosing current property to rent (1,038)**



Public transport was considered more important as a factor amongst the higher socio-economic groups and in Dublin/in rent pressure zone areas.

Amongst tenants belonging to socio-economic group DE and outside of rent pressure zones, public transport services were rated less important overall. Nearly three in four (73% (223)) tenants that were renting outside rent pressure zones stated that public transport services were ‘not at all a factor’ when choosing their current property to rent (Table A1.6 in Appendix I).

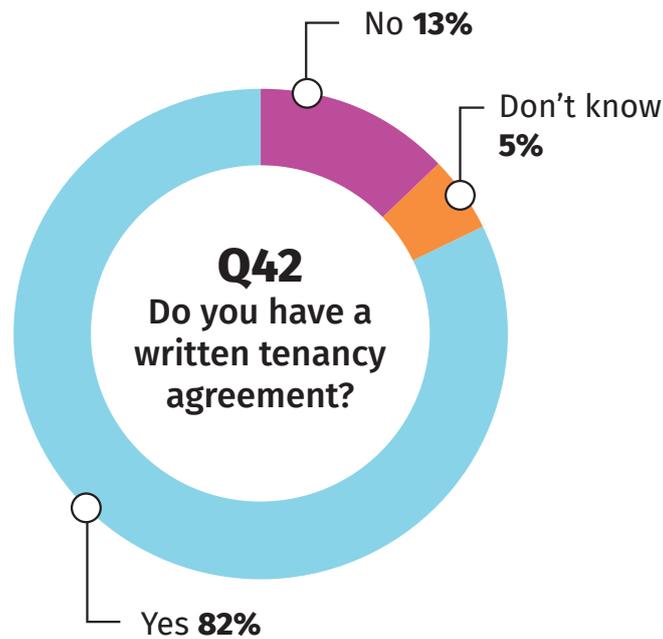
2.10 Awareness of Rights and Responsibilities

This section of the report presents the findings from questions asked about the rights and responsibilities of tenants and landlords.

2.10.1 Written Tenancy Agreements

When asked the question, the majority (82% (850)) of tenants stated that they have a written tenancy agreement (Figure 2.40).

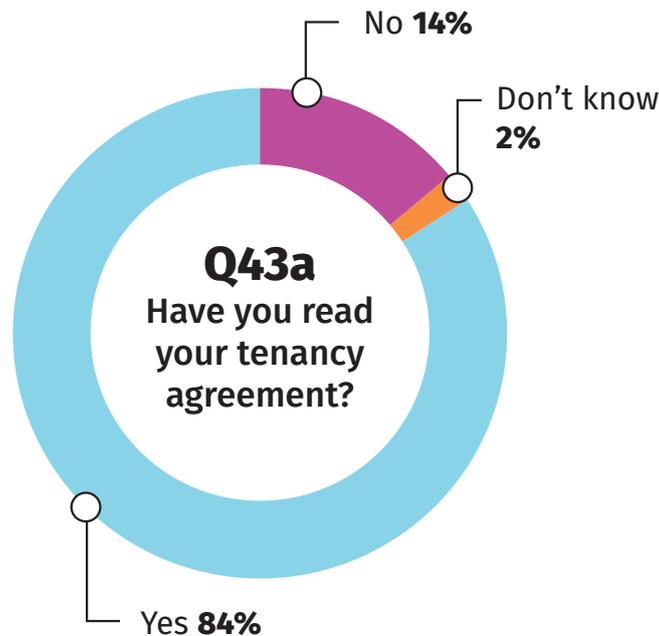
Figure 2.40: **Q42 Whether have a written tenancy agreement (n=1,038)**



Possession of a written tenancy agreement was highest amongst 35-44 year olds (87% (245)) and tenants renting in Dublin (87% (356)). It was lowest amongst the youngest age cohort age 19-24 (70% (96)), as shown in Table A1.7 in Appendix I.

Figure 2.41 shows that amongst those tenants who had a written tenancy agreement, the majority (84% (715)) claimed to have read the document.

Figure 2.41: **Q43a Whether have read tenancy agreement excluding tenants who do not have a written tenancy agreement (n=850)**



This result was consistent across the different demographic groups - 92% (99) of tenants belonging to socio-economic group AB stated that they had read their written tenancy agreement (Table 2.43).

Table 2.43: Q43a Whether have read tenancy agreement excluding tenants who do not have a written tenancy agreement (n=850)

	Total (850)	Age				Social Class				Citizenship	
		19-24 (96)	25-34 (362)	35-44 (245)	45+ (148)	AB (108)	C1 (242)	C2 (229)	DE (272)	Irish Citizen (508)	Non-Irish Citizen (339)
Yes	84%	84%	83%	86%	84%	92%	81%	82%	86%	84%	85%
No	14%	15%	15%	12%	13%	7%	16%	15%	12%	14%	13%
Don't know	2%	1%	2%	2%	3%	1%	3%	3%	2%	2%	2%

	Total (850)	Region				RPZ		Renting in Total		
		Dublin (356)	GDA (88)	Non-Dublin (494)	Non GDA (406)	Inside RPZ (609)	Outside RPZ (241)	Renting <1yr (161)	Renting 1-4yrs (353)	Renting 5+yrs (336)
Yes	84%	87%	79%	82%	83%	84%	85%	82%	84%	85%
No	14%	11%	20%	15%	15%	13%	15%	17%	14%	12%
Don't know	2%	2%	2%	3%	3%	3%	1%	1%	2%	3%

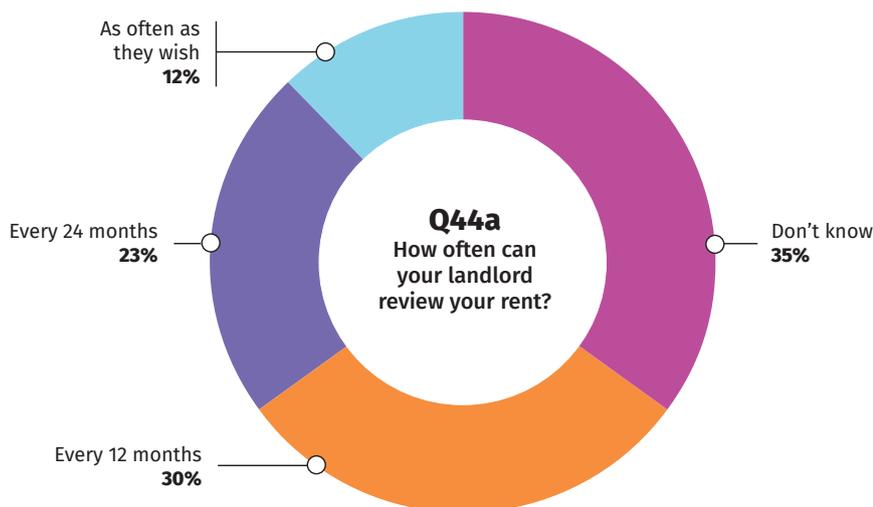
Q43a Have you read your tenancy agreement?

2.10.2 Rent Reviews

Respondents were asked if they are aware how often their landlord can review their rent.

The majority (53% (529)) of all those surveyed are aware that their landlord can review their rent 'every 12/24 months'. However, 35% (347) of tenants stated that they do not know how often their landlord can review their rent and 12% (121) said that their landlord can review their rent 'as often as they wish' (Figure 2.42).

Figure 2.42: Q44a Awareness of frequency of rent reviews (n=997)



Awareness of frequency of rent reviews was lowest amongst 19-24 year olds (45% (59) stated 'don't know'), socio-economic groups C1 (41% (115)), DE (43% (140)) and tenants renting outside of Dublin and the greater Dublin area (44% (221) stated 'don't know').

Awareness of frequency of rent reviews was highest amongst socio-economic group AB and in Dublin/the greater Dublin area (Table A1.8 in Appendix I).

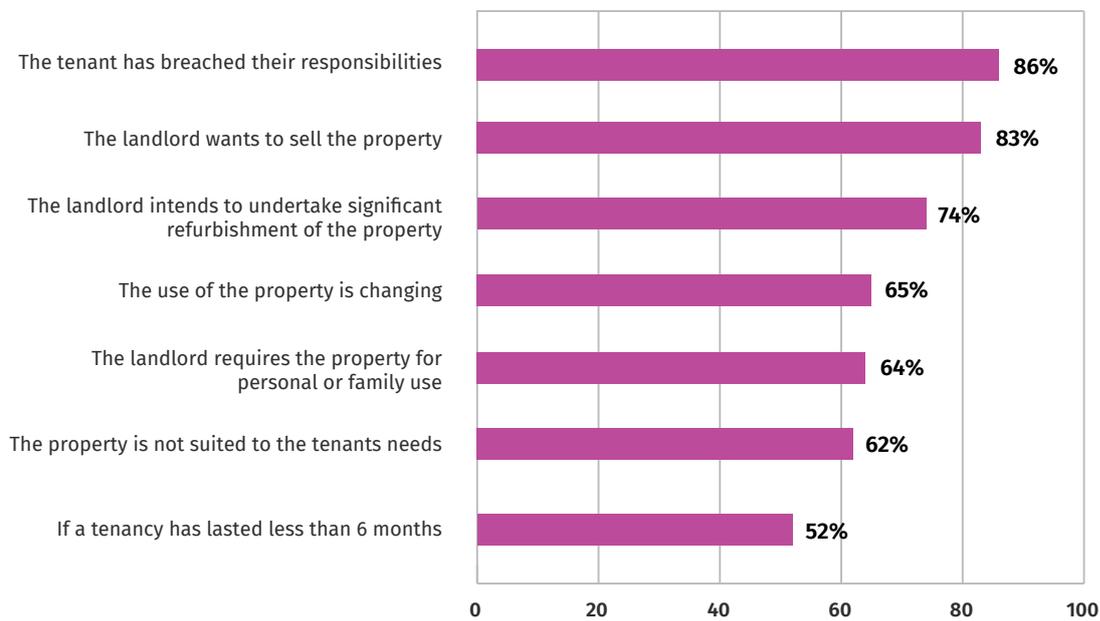
2.10.3 Terminating a Tenancy

Tenants were shown a list of reasons a landlord can terminate a tenancy and asked which ones they were aware of. The results are set out in Figure 2.43 below.

Awareness was highest for ‘the tenant has breached their responsibilities’ (86% (860)), followed by ‘the landlord wants to sell the property’ (83% (826)) and ‘the landlord intends to undertake significant refurbishment of the property’ (74% (736)). Nearly two-thirds of all tenants were aware that a landlord can terminate a tenancy if ‘the use of the property is changing’ (65% (644)), ‘the landlord requires the property for personal or family use’ (64% (642)) and ‘the property is not suited to the tenant’s needs’ (62% (615)).

However, only 52% (522) of tenants were aware that a tenancy could be terminated ‘if a tenancy had lasted less than 6 months’.

Figure 2.43: Q44b Prompted awareness of reasons a landlord can terminate a tenancy (n=997)



There were some differences in prompted awareness levels by demographic subgroup.

The youngest age cohort (age 19-24) was more likely to mention ‘the tenant has breached their responsibilities’ (92% (120)) and ‘the property is not suited to the tenant’s needs’ (69% (91)). Socio-economic group DE was more likely to mention ‘the use of the property is changing’ (71% (232)), ‘the property is not suited to the tenant’s needs’ (68% (222)) and ‘if a tenancy has lasted less than 6 months’ (61% (201)).

Higher levels of prompted awareness of reasons for terminating a tenancy were also recorded amongst tenants who lived outside of rent pressure zones and long-term renters (5+ years) (Table A1.9 in Appendix I).

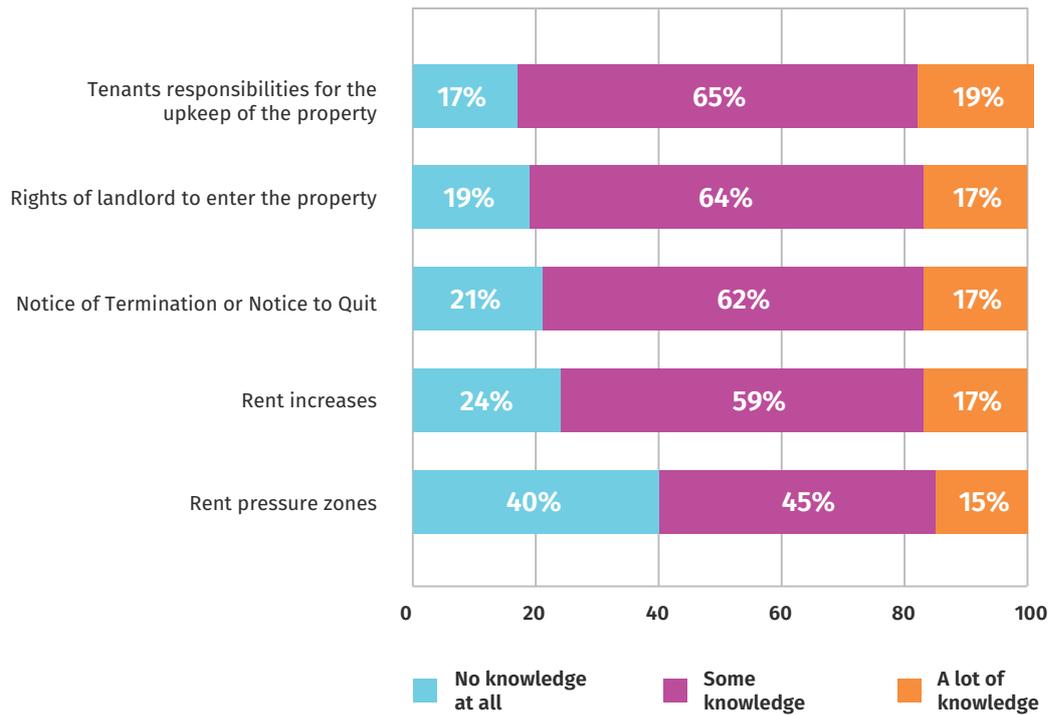
2.10.4 Rights and Responsibilities of Landlords and Tenants

In this next section respondents were asked to indicate their level of knowledge about a number of rights and responsibilities using a 3-point scale – a lot of knowledge, some knowledge and no knowledge at all. The results are shown in Figure 2.44 below.

The majority of tenants claim to have at least some knowledge on a range of issues to do with the rights and responsibilities of landlords and tenants. Tenants claim to be most knowledgeable about 'tenant's responsibilities for the upkeep of the property' (83% (832)) had 'a lot of/some knowledge'), followed by the 'rights of a landlord to enter the property' (81% (810)) and 'notice of termination or notice to quit' (79% (789)). Tenants are less knowledgeable about rent pressure zones and rent increases - 40% (398) of all tenants had 'no knowledge at all' about rent pressure zones and 24% (238) of tenants claimed that they knew nothing about rent increases.

The findings from the tenant focus groups were very similar in relation to awareness of the rights and responsibilities of landlords and tenants.

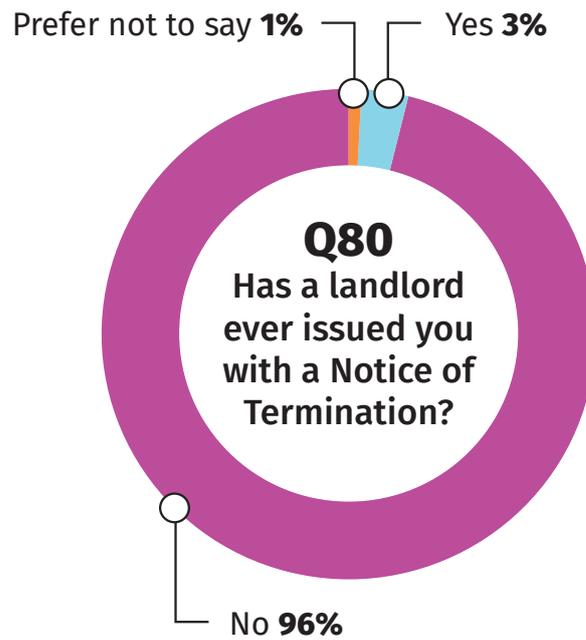
Figure 2.44: Q44c Perceived level of knowledge about rights and responsibilities (n=997)



Prompted awareness of the rights and responsibilities of landlords and tenants varied significantly by age and sociodemographic group. The youngest age cohort of 19-24 year olds was the least knowledgeable and socio-economic group AB was the most knowledgeable. Not surprisingly, length of time renting was also a key factor. Those who were renting longer tended to be the most knowledgeable (Table A1.10 in Appendix I).

The incidence of being issued with a Notice of Termination by a landlord was low overall (3% (32)) as seen in Figure 2.45 below.

Figure 2.45: **Q80 Whether ever issued with a Notice of Termination by a landlord (n=997)**



However, the rate was twice as high (6% (6)) in the Greater Dublin Area (Table A1.11 in Appendix I).

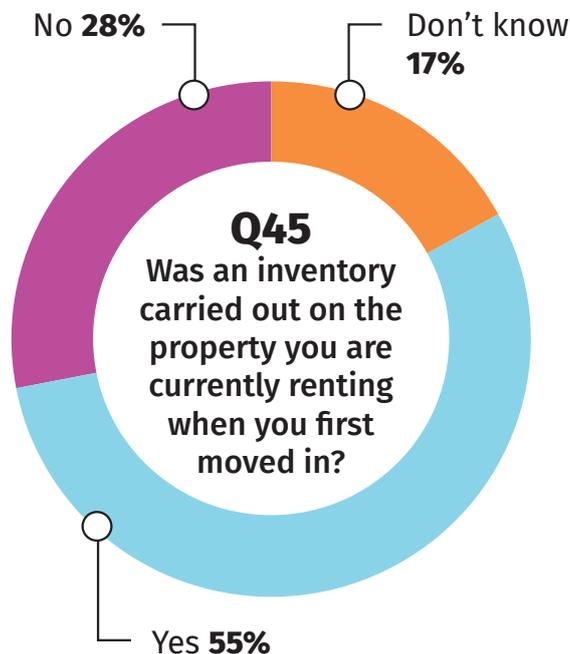
2.11 Property Inspections and Maintenance Requests

Tenants were asked a series of questions about the property they were currently renting, the results of which are presented in this section.

2.11.1 Property Inventory

The majority (55% (574)) of tenants stated that an inventory was carried out on their current property when they first moved in. However, 28% (292) said that there was no inventory carried out and 17% (173) did not know if an inventory was carried out (Figure 2.46).

Figure 2.46: **Q45 Whether an inventory was carried out when first moved into current property (n=1,038)**

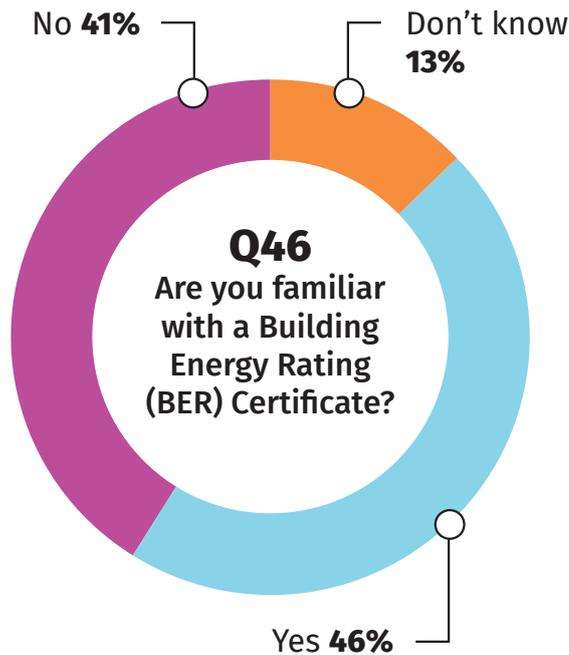


The level of ‘don’t know’ responses increased to 24% (33) amongst the youngest age cohort (19-24 year olds). Whereas older tenants (age 45+) and those belonging to socio-economic group AB were more likely to be aware that an inventory had been carried out (Table A1.12 in Appendix I).

2.11.2 Building Energy Rating (BER) Certificate

Nearly half (46% (479)) of all tenants surveyed stated that they were familiar with a Building Energy Rating (BER) certificate (Figure 2.47).

Figure 2.47: Q46 Whether familiar with a Building Energy Rating (BER) certificate (n=1,038)

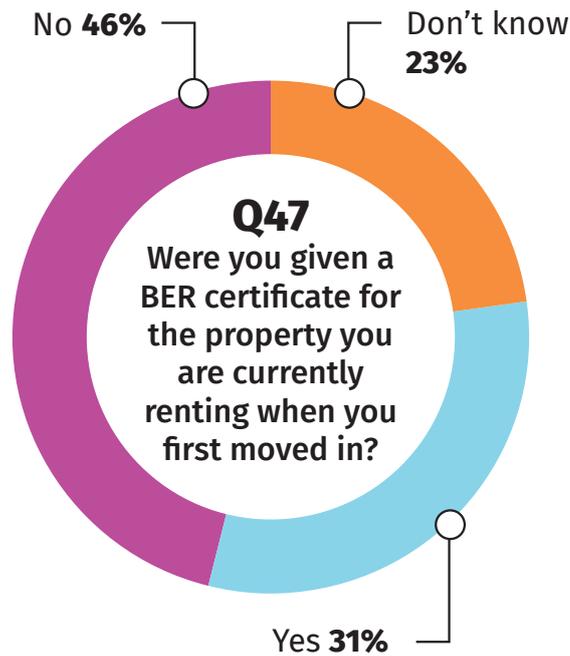


Familiarity with a BER certificate was highest amongst 45+ year olds (52% (92)), socio-economic groups AB (63% (79)) and C2 (53% (147)) and amongst tenants renting in the Greater Dublin Area (55% (56)).

Lower levels of familiarity were recorded amongst 19-24 year olds, socio-economic group DE and non-Irish citizens (Table A1.13 in Appendix I).

In January 2009, it became mandatory for all residential properties offered for rent to have a Building Energy Rating (BER) certificate. However, the survey found that fewer than one in three (31% (318)) tenants were given a Building Energy Rating (BER) certificate for their current property when they first moved in. Interestingly, when asked this question, 23% (238) didn't know if they were given a BER certificate (Figure 2.48).

Figure 2.48: Q47 Whether given a BER certificate for current property when first moved in (n=1,038)



Those who were most likely to have been given a BER certificate for their current property included 45+ year olds (37% (65)), socio-economic groups AB (42% (52)) and C2 (37% (103)) and tenants renting in Dublin (40% (165)) and the Greater Dublin Area (41% (42)), these findings can be seen in Table A1.14 in Appendix I.

2.11.3 Local Authority Inspections

Local authorities are responsible for conducting planned programmes of inspection of private rented properties. For properties under the Housing Assistance Payment (HAP) scheme, the local authority will inspect the accommodation within the first eight months of the tenancy.

The study found that 14% (150) of tenants had their current property inspected by the Local Authority since moving in. A similar proportion (14% (142)) were not aware if the property had been inspected and 72% (746) of tenants stated that the property had not been inspected since moving in (Figure 2.49).

Figure 2.49: **Q48 Whether Local Authority has carried out an inspection on current property since moving in (n=1,038)**

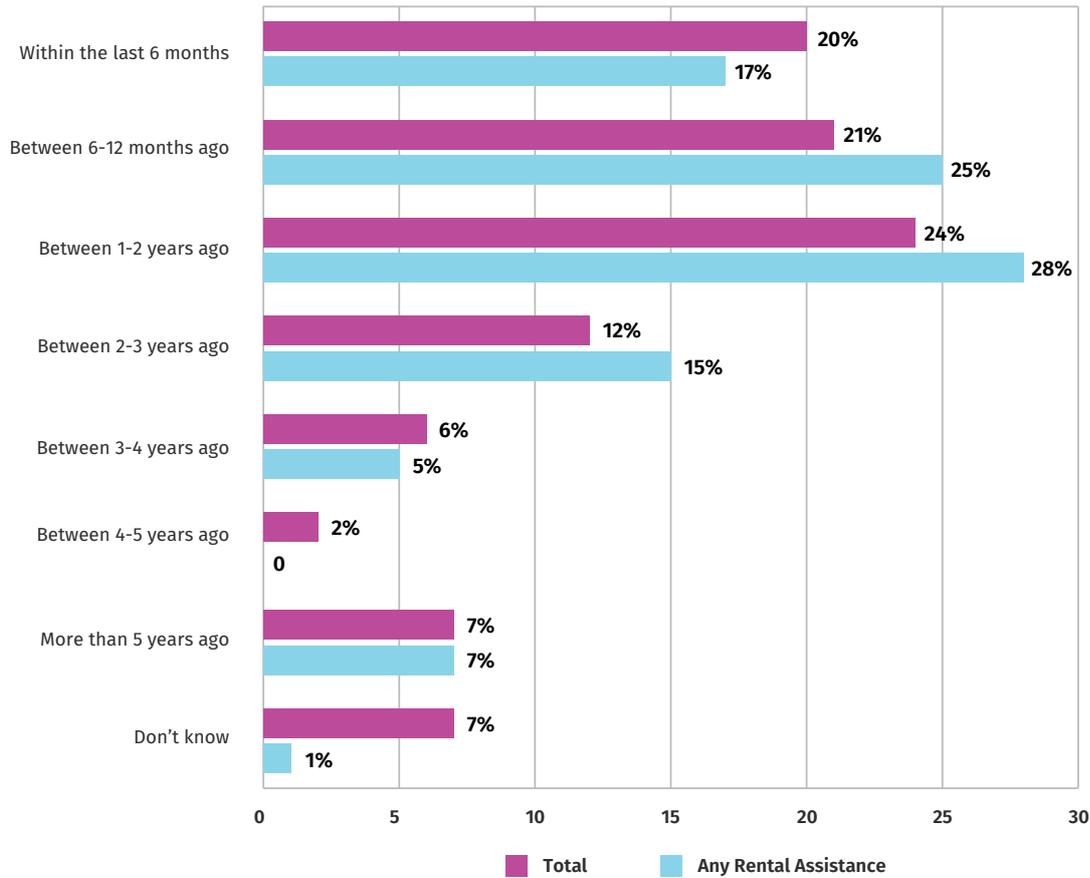


Local Authority inspections were most prevalent amongst older tenants aged 45+ (20% (35)), socio-economic group DE (22% (77)), long-term renters (20% (82)) and those in receipt of rental assistance (38% (78)). Nearly half (47% (53)) of all tenants receiving Housing Assistance Payment (HAP) had their property inspected by the Local Authority (Table A1.15 in Appendix I).

Tenants who had their current property inspected by the Local Authority were asked when this inspection was last carried out. The results are set out in Figure 2.50 below.

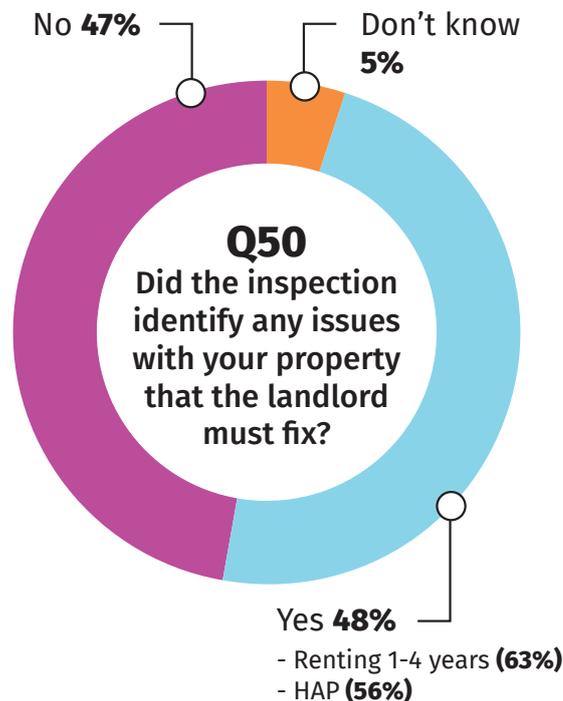
Nearly two thirds (65% (98)) of all property inspections were carried out within the last two years and 20% (30) within the last six months of the survey being conducted. Amongst those tenants in receipt of any rental assistance the profile was similar.

Figure 2.50: Q49 Recency of last property inspection excluding tenants who did not have their current property inspected by the Local Authority (n=150)



Almost half (48% (72)) of tenants who had their current property inspected by the Local Authority stated that the inspection identified an issue that the landlord must fix (Figure 2.51). The figure was higher amongst those on HAP (56% (29)) and medium-term renters (63% (35)).

Figure 2.51: Q50 Whether the inspection identified any issues that the landlord must fix excluding tenants who did not have their current property inspected by the Local Authority (n=150)



2.11.4 Landlord Inspections

A landlord has the right to carry out routine property inspections. The RTB recommend a property inspection once every three months.

Nearly four in ten (37% (388)) tenants stated that the landlord had carried out an inspection on their current property (Figure 2.52). This figure was slightly higher for those on rental assistance (42% (85)).

Figure 2.52: **Q51 Whether landlord has carried out an inspection on current property since moving in (n=1,038)**

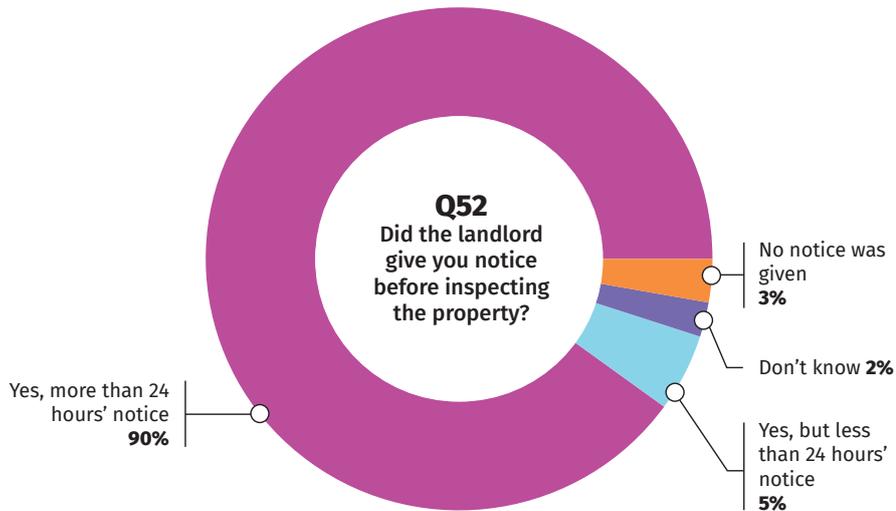


Landlord inspections were more likely in Dublin (44% (180)) versus the rest of the country (33% (208)). Not surprisingly, there was a higher rate of inspection amongst those renting for 5+ years (43% (177)), as can be seen in Table A1.16 in Appendix I.

If a landlord needs to enter their property, the tenant's consent is required to access the dwelling and the landlord should give them reasonable notice.

A total of 90% (348) of all tenants who had their current property inspected by the landlord were given 'more than 24 hours' notice'. An additional 5% (19) were given 'less than 24 hours' notice' and 3% (13) were given 'no notice' at all (Figure 2.53).

Figure 2.53: **Q52 Whether landlord gave notice before inspecting the property excluding tenants whose landlord did not carry out an inspection (n=388)**

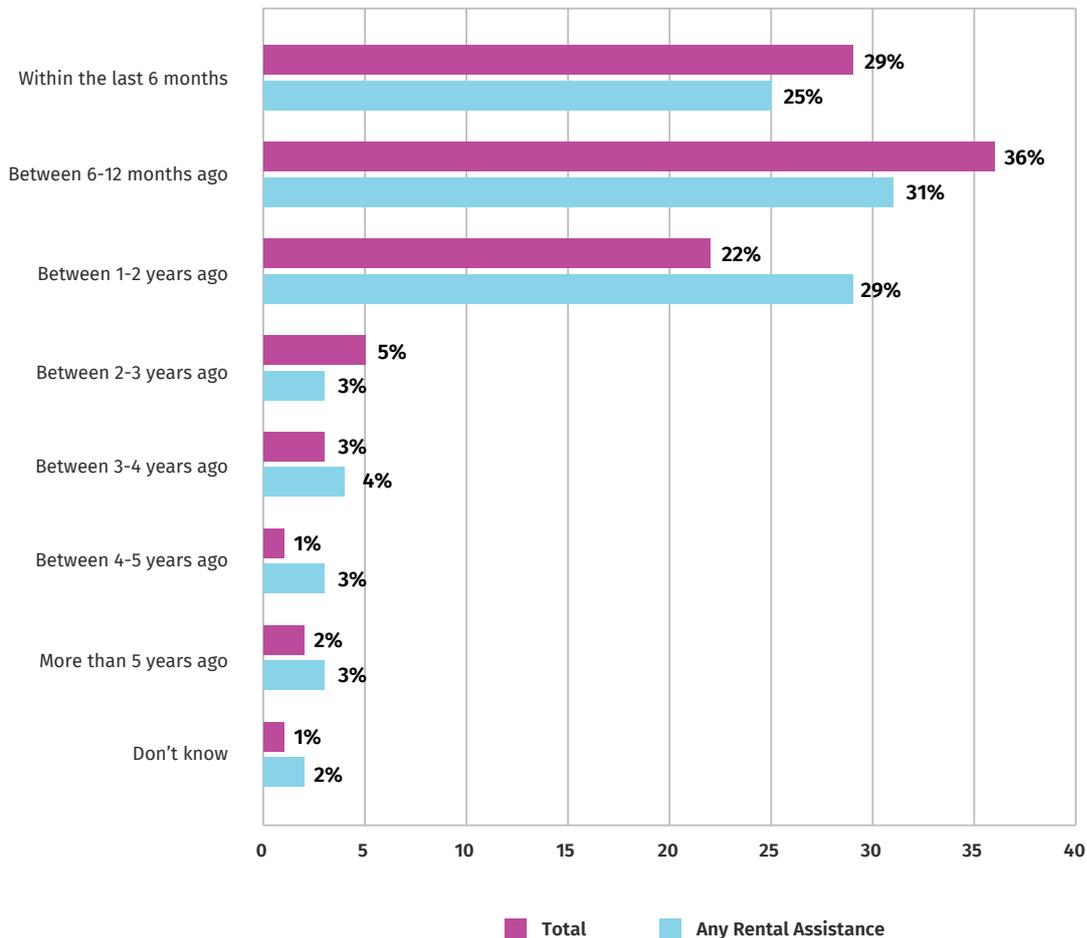


The notice given was consistent across most subgroups (Table A1.17 in Appendix I).

The majority (65% (252)) of all landlord inspections were carried out within the last 12 months, 87% (339) within the last two years of the survey being conducted.

Amongst those tenants in receipt of any rental assistance, a smaller proportion (56% (48)) had their inspection carried out in the last 12 months (Figure 2.54).

Figure 2.54: **Q53 Recency of last property inspection excluding tenants whose landlord did not carry out an inspection (n=388)**



The higher socio-economic groups ABC1, non-Irish citizens, medium term renters and tenants renting in Dublin and inside rent pressure zones were more likely to have had landlord inspections within the last 12 months (Table A1.18 in Appendix I).

2.11.5 Maintenance Requests

Nearly half (47% (492)) of all tenants have made a maintenance request to their landlord or letting agent while living in their current property. The figure was slightly higher for those on rental assistance (55% (110)), particularly those on HAP (59% (66)).

The absence of responsibility for maintenance and repair was frequently cited in the focus groups as an advantage of renting.

Figure 2.55: **Q54a Whether ever made a maintenance request to landlord or letting agent since living in current property (n=1,038)**



Older tenants (age 35+), tenants belonging to socio-economic group AB and medium to long-term renters were more likely to have made a maintenance request (Table 2.44).

Table 2.44: Q54a Whether ever made a maintenance request to landlord or letting agent since living in current property (n=1,038)

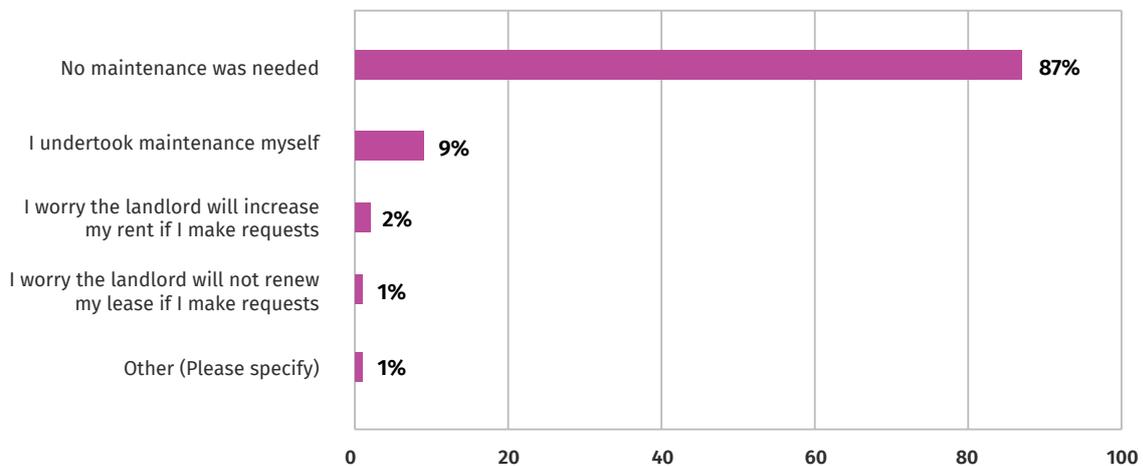
	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Yes	47%	31%	46%	53%	54%	53%	47%	42%	50%	48%	47%
No	48%	61%	50%	42%	43%	42%	48%	56%	44%	47%	50%
Don't know	5%	7%	4%	5%	3%	5%	5%	2%	6%	6%	3%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Yes	47%	42%	50%	51%	51%	46%	50%	25%	50%	55%
No	48%	50%	50%	47%	46%	48%	47%	72%	46%	38%
Don't know	5%	8%	0	2%	3%	5%	3%	3%	3%	6%

Q54a Have you ever made a maintenance request to your landlord or letting agent since you have lived in this property?

Tenants that had never made a maintenance request were asked the reason why. Nearly nine in ten (87% (412)) gave the answer that ‘no maintenance was needed’ and 9% (42) stated that they ‘undertook maintenance myself’ (Figure 2.56).

Figure 2.56: Q54b Reason for not making any maintenance requests excluding tenants that have made a maintenance request (n=473)



Long-term renters and tenants renting outside of rent pressure zones were more likely to undertake maintenance themselves (Table 2.45).

Table 2.45: Q54b Reason for not making any maintenance requests excluding tenants that have made a maintenance request (n=473)

	Total (473)	Age				Social Class				Citizenship	
		19-24 (81)	25-34 (210)	35-44 (110)	45+ (72)	AB (50)	C1 (132)	C2 (154)	DE (137)	Irish Citizen (289)	Non-Irish Citizen (181)
No maintenance was needed	87%	93%	88%	85%	83%	86%	91%	86%	84%	87%	86%
I undertook maintenance myself	9%	2%	9%	11%	11%	5%	7%	11%	10%	8%	10%
I worry the landlord will increase my rent if I make requests	2%	3%	1%	3%	4%	6%	1%	2%	3%	2%	2%
I worry the landlord will not renew my lease if I make requests	1%	1%	1%	1%	1%	0	1%	1%	2%	1%	*
Other (Please specify)	1%	1%	1%	0	1%	3%	0	0	1%	1%	1%

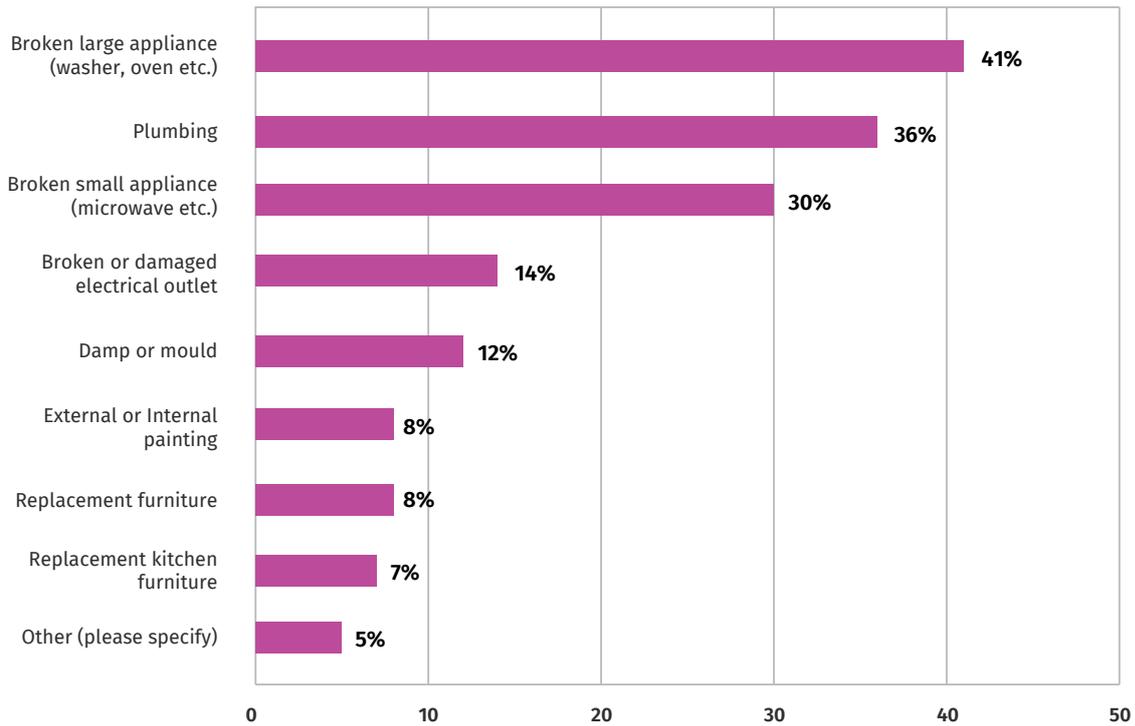
	Total (473)	Region				RPZ		Renting in Total		
		Dublin (196)	GDA (51)	Non-Dublin (277)	Non GDA (226)	Inside RPZ (332)	Outside RPZ (141)	Renting <1yr (135)	Renting 1-4yrs (196)	Renting 5+yrs (142)
No maintenance was needed	87%	92%	89%	84%	83%	90%	81%	92%	89%	79%
I undertook maintenance myself	9%	4%	8%	12%	14%	7%	14%	5%	7%	14%
I worry the landlord will increase my rent if I make requests	2%	3%	0	2%	2%	2%	3%	2%	3%	2%
I worry the landlord will not renew my lease if I make requests	1%	1%	3%	1%	*	1%	1%	1%	1%	1%
Other (Please specify)	1%	1%	0	1%	1%	*	2%	0	0	2%

Q54b Why have you not made any maintenance requests?

Tenants that had made a maintenance request were asked the nature of that request. The results are shown in Figure 2.57 below.

The most common maintenance requests related to broken appliances and plumbing. A 'broken large appliance' and 'broken small appliance' were mentioned by 41% (200) and 30% (146) respectively. Maintenance requests relating to 'plumbing' were mentioned by 36% (175) of tenants.

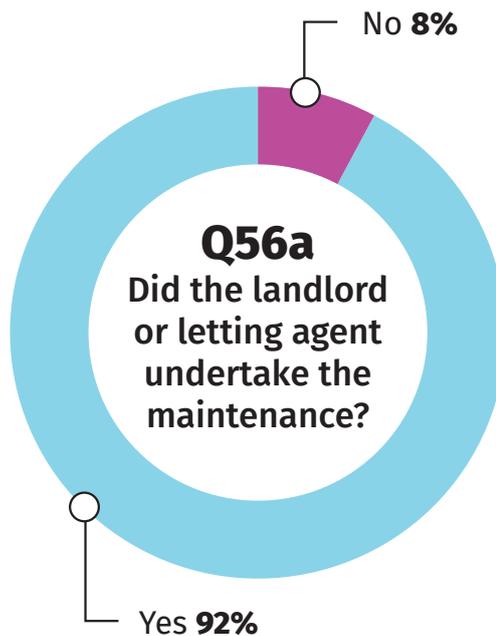
Figure 2.57: **Q55 Maintenance requests excluding tenants that have never made a maintenance request since living in current property (n=492)**



The nature of the maintenance request varied by socio-economic group and region to some extent (Table A1.19 in Appendix I).

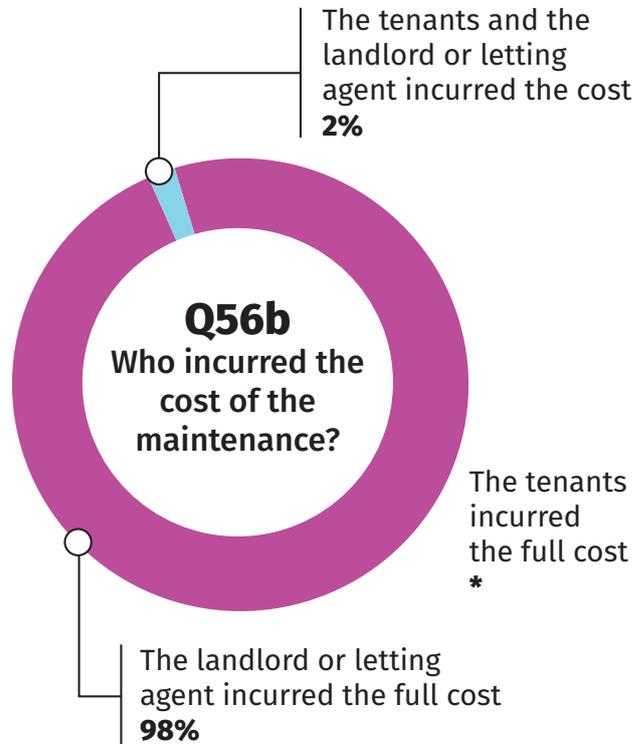
In 92% (452) of cases, the landlord or letting agent undertook the maintenance requested by the tenant (Figure 2.58).

Figure 2.58: **Q56a Whether landlord or letting agent undertook the maintenance excluding tenants that have never made a maintenance request since living in current property (n=492)**



The landlord or letting agent incurred the full cost of maintenance in all but a handful of cases (Figure 2.59).

Figure 2.59: **Q56b Who incurred the cost of the maintenance excluding tenants that have never made a maintenance request since living in current property and tenants whose landlord or letting agent did not undertake the maintenance (n=452)**



Tenants were also asked if they themselves had ever undertaken any maintenance work in their current property that they should have brought to the attention of the landlord or letting agent.

One in four (26% (270)) answered 'yes' to this question (Figure 2.60).

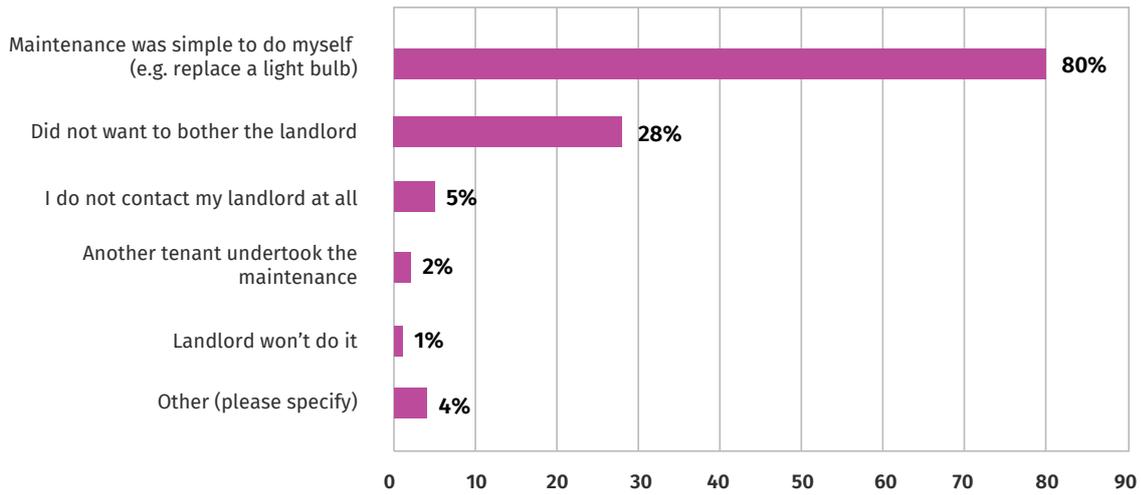
Figure 2.60: **Q58a Whether ever undertaken any maintenance work in current property that should have been brought to the landlord's or letting agent's attention (n=1,038)**



The incidence of tenants undertaking maintenance work themselves varied significantly by age and length of time renting with 34% (60) of tenants aged 45+ and 36% (149) of tenants renting 5+ years saying 'yes' to this question (Table A1.20 in Appendix I).

Amongst those tenants who undertook maintenance work themselves, 80% (213) did so because it was 'simple to do (e.g. replace a light bulb)' and 28% (73) said they 'did not want to bother the landlord' (Figure 2.61).

Figure 2.61: Q58b Reason(s) for undertaking maintenance by oneself excluding tenants who have not undertaken maintenance work themselves (n=265)

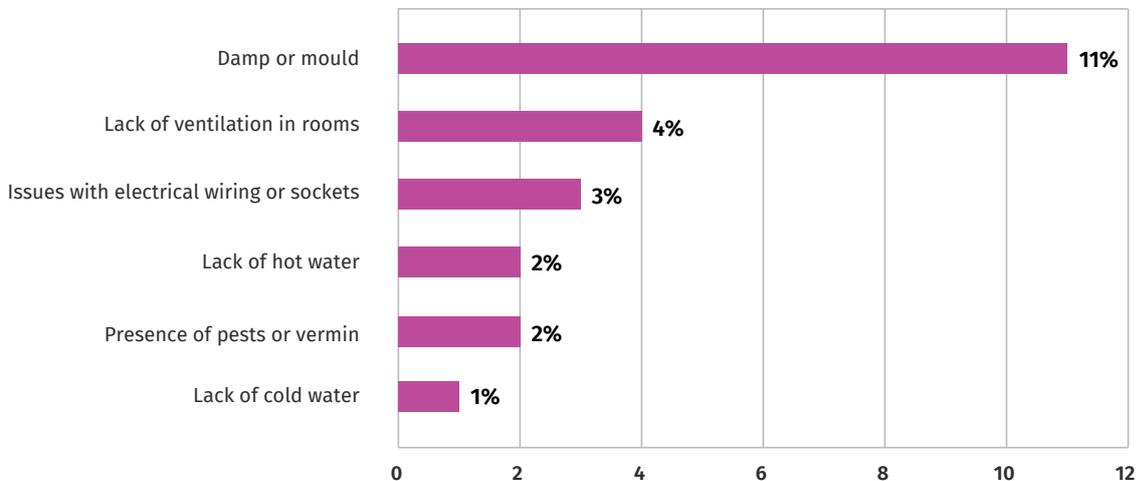


2.11.6 Property Issues

Respondents were prompted with a list of issues and asked which one(s), if any, applied to their current property. The results are set out in Figure 2.62.

The main issue that tenants had was 'damp or mould' (11% (118)). 'Lack of ventilation in rooms' was also mentioned by 4% (42) of tenants.

Figure 2.62: Q61 Whether property has any issues (n=1,038)



These and other issues appeared to be slightly more prevalent in rental properties outside of Dublin and rent pressure zones (Table A1.21 in Appendix I).

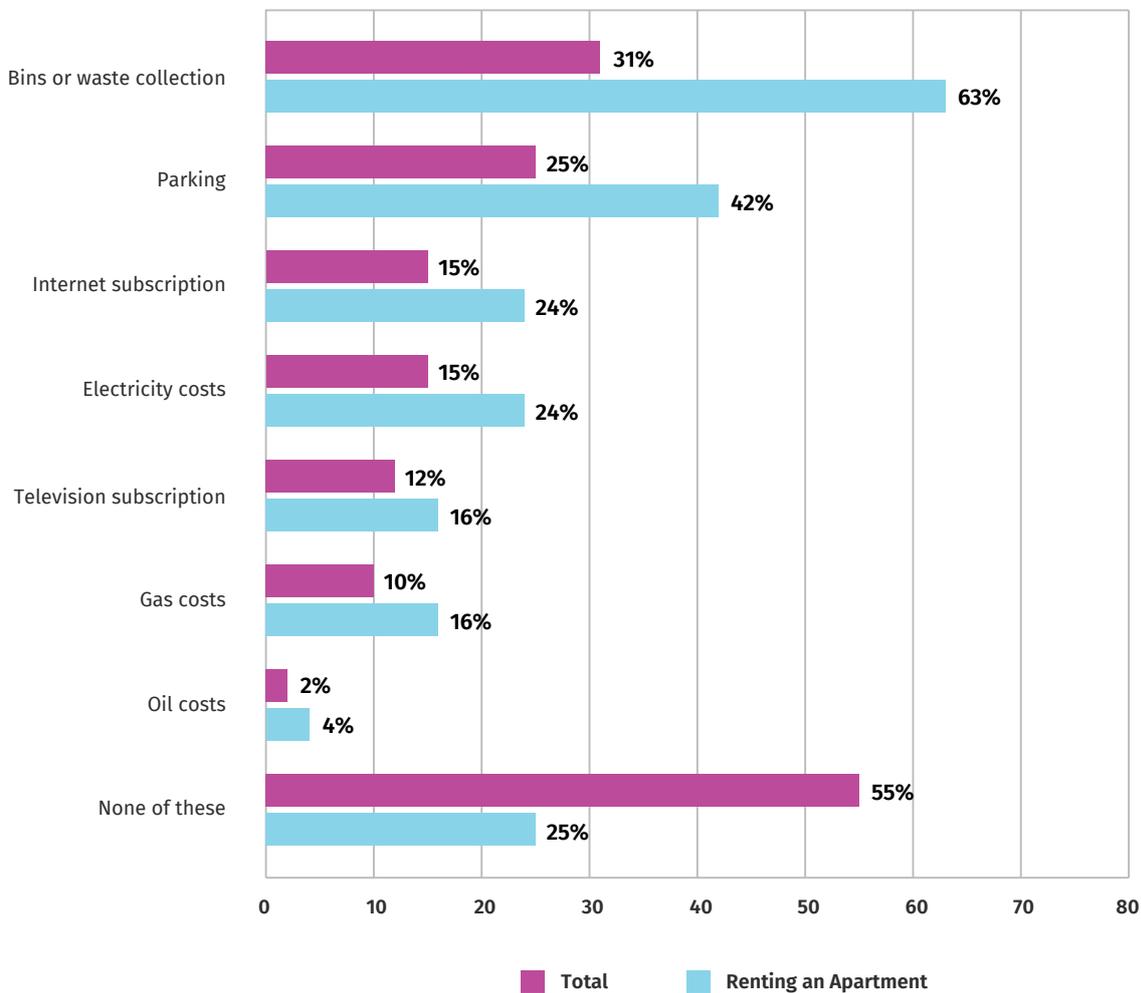
2.11.7 Property Facilities/Services

Tenants were prompted with a list of services and asked which ones, if any, were included in their monthly rent payments.

'Bins or waste collection' was the service most likely to be included in monthly rent payments (31% (319)), followed by 'parking' (25% (261)), 'internet subscription' (15% (156)) and 'electricity costs' (15% (154)). However, for the majority (55% (572)) of tenants, none of these services were included in their monthly rent payments (Figure 2.63).

Tenants renting an apartment (purpose-built or non-purpose-built), were more likely to have a range of services included in their monthly rent payments. Two-thirds (63% (173)) of these tenants stated that 'bin or waste collection' was included and 42% (114) said that 'parking' was included.

Figure 2.63: Q30 Services included in monthly rent payments (n=1,038)

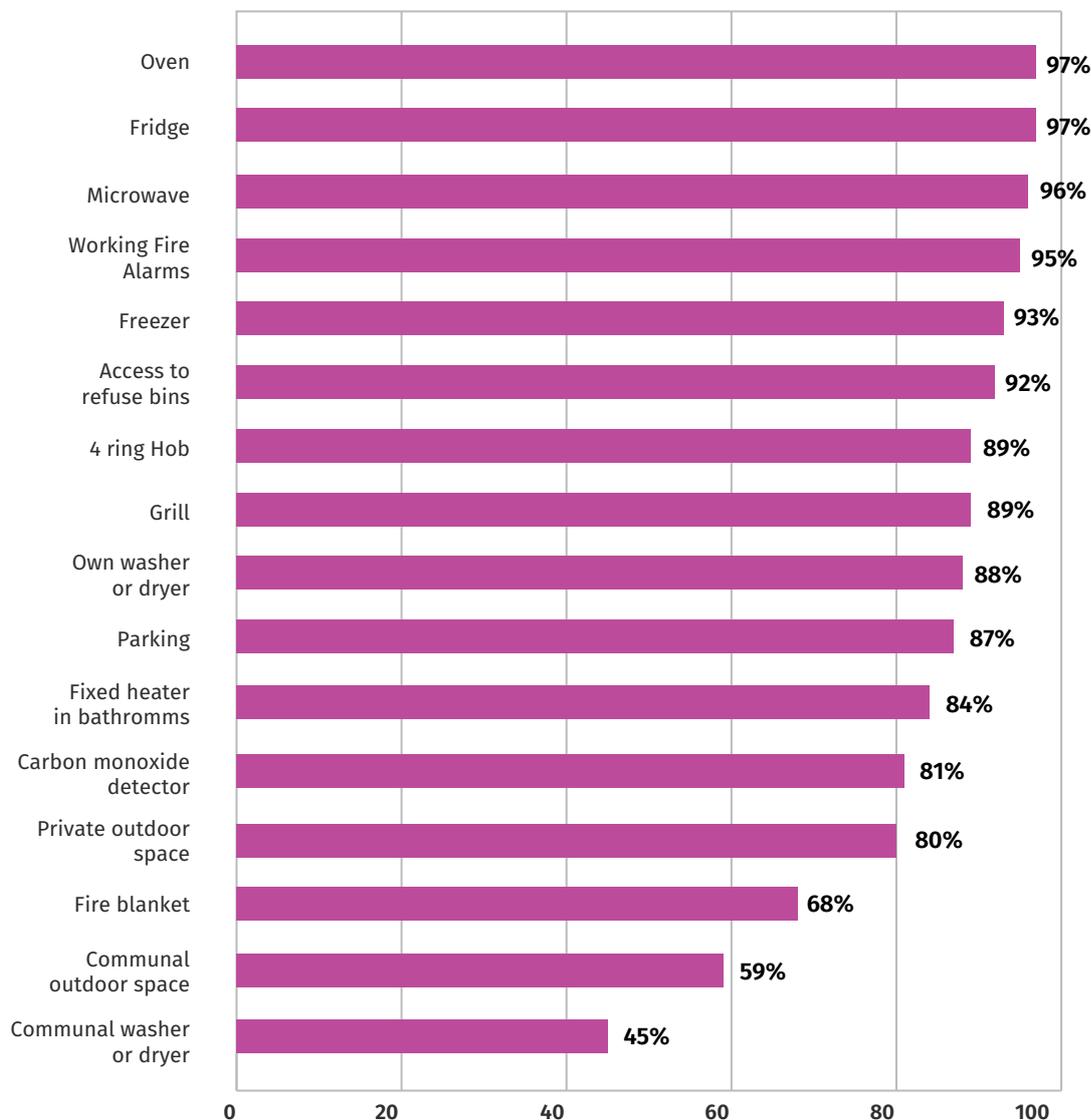


The younger age cohorts, particularly 19-24 year olds, were more likely to have services such as 'bins or waste collection', 'internet subscription', 'electricity costs' and 'television subscription' included in their monthly rent payments. These services and 'parking' were also more likely to be mentioned by higher socio-economic groups ABC1.

Tenants renting in Dublin and the Greater Dublin Area were more likely to have these services (with the exception of parking) included than tenants renting outside of these areas (Table A1.22 in Appendix I).

The study found that there was widespread access in rented properties to most white goods, smaller electrical items and other facilities amongst tenants surveyed (Figure 2.64).

Figure 2.64: Q60 Whether property has access to (n=1,038)



Access to parking and outdoor space (both private and communal) was higher outside of the capital and rent pressure zones. Tenants who were renting outside of Dublin and the Greater Dublin Area had the most access to communal outdoor space (Table A1.23 in Appendix I).

2.12 The Experience of Non-Irish Citizens

In this section of the report, the experience of non-Irish citizens in the private rented sector is examined. The results from the survey in this section are based on 393 respondents all of whom indicated that they were non-Irish citizens.

Non-Irish citizens accounted for 38% of all private tenants surveyed.

The profile of Irish citizens and non-Irish citizens is set out in Table 2.46 below. The demographic profile of non-Irish citizens was broadly similar to that of Irish citizens, the main difference being that non-Irish citizens were more likely to be married (51% vs 24%). In addition, non-Irish citizens were more likely than Irish citizens to be aged 35-44 (32% vs 24%), male (55% vs 48%), renting in Dublin (42% vs 37%) and Connacht/Ulster (19% vs 13%), renting in a semi-detached house (45% vs 36%) and converted apartment/flat (8% vs 3%).

Table 2.46: Sample profile of Irish Citizens vs Non-Irish Citizens

	Irish Citizens	Non-Irish Citizens
Age	(640)	(393)
Young adults 19-24 years	15%	10%
Persons aged 25-34 years	42%	44%
Persons aged 35-44 years	24%	32%
Persons aged 45-54 years	11%	10%
Persons aged 55-64	7%	4%
Persons aged 65+	2%	*
Gender		
Male	48%	55%
Female	52%	45%
Socio-economic group		
AB	12%	12%
C1	29%	27%
C2	26%	28%
DE	34%	33%
Region		
Dublin	37%	42%
Leinster (excluding Dublin)	23%	17%
Munster	26%	22%
Connacht and Ulster	13%	19%
Local Authority Area (Dublin only)		
Dublin City	24%	21%
Dún Laoghaire-Rathdown	5%	6%
Fingal	4%	10%
South Dublin	4%	5%
Rent Pressure Zones		
Inside	69%	72%
Outside	31%	28%
Citizenship		
Republic of Ireland	100%	-
Outside Republic of Ireland	-	100%
Marital Status		
Married or Civil partnership	24%	51%
Cohabiting	27%	13%
Single – never married	34%	27%
Divorced	2%	3%
Widowed	2%	1%
Separated	6%	1%
Prefer not to say	5%	4%

	Irish Citizens	Non-Irish Citizens
Dwelling Type		
Detached House	9%	5%
Semi-detached House	36%	45%
Terraced House	28%	20%
Apartment purpose built	22%	21%
Apartment / flat converted	3%	8%

Profile of Non-Irish Citizens

- ▶ Roughly half (52%) of all non-Irish citizens were EU citizens, 6% were UK citizens and 43% were 'rest of the world' citizens.
- ▶ In terms of ethnicity, 58% had a white background (non-Irish), 21% had an Asian background, 9% had a black background and 6% had an 'other including mixed background'.
- ▶ A total of 42% of all non-Irish citizens were 'living with my spouse or partner with children', this compares to 28% of all Irish citizens.
- ▶ Amongst those renting for one year or longer, the average time renting was 5.43 years (vs 6.61 years for Irish citizens).
- ▶ One in twenty (5%) 'currently own a property' (vs 8% of all Irish citizens).
- ▶ Before moving into their current rental property, 29% of non-Irish citizens were living abroad (vs 8% of Irish citizens) and 62% were living in another rental property (vs 56% of all Irish citizens).

Paying Rent

- ▶ When first renting their current property, the median deposit paid by non-Irish citizens was slightly higher than that paid by Irish Citizens (€1000 vs €900). The median rent paid on a monthly basis was also higher (€1,000 vs €800).
- ▶ This is reflected in non-Irish citizens having a higher percentage of their monthly net income going towards paying their rent on a monthly basis (a median of 35% vs 30% for Irish citizens).
- ▶ The majority (52%) of non-Irish citizens believed that the rent they paid was 'in line with similar properties in my area'. This compares to 46% of all Irish citizens.
- ▶ Non-Irish citizens were more likely than Irish citizens to have provided the landlord with documentation (previous landlord references, employers reference, statement of income, bank statements) prior to renting (66% vs 56%).

Rent Pressure Zones

- ▶ A slightly higher proportion of non-Irish citizens were renting in a rent pressure zone (72% vs 69% of Irish citizens). But awareness of rent pressure zones was significantly lower amongst non-Irish citizens (31% vs 40%).

Rental Assistance

- ▶ One in seven (14%) of non-Irish citizens stated that they were in receipt of rental assistance compared to one in four (23%) of all Irish Citizens.
- ▶ A total of 84% of all non-Irish citizens who were in receipt of rental assistance paid a top-up payment to their landlord to cover the difference between their rental assistance and the cost of their rent. This compared to 59% of all Irish citizens who were in receipt of rental assistance.

Motivations for Renting and Future Intentions

- ▶ Motivations for currently renting were broadly similar (convenience, can't get a mortgage etc). However, a higher proportion of non-Irish citizens were 'not sure where I want to settle down or live long term' (21% vs 14% for Irish citizens).
- ▶ More than half (52%) of all non-Irish citizens who saw themselves being an owner occupier in a house or apartment in 12 months/5 years/10 years stated that if they were to buy they would be looking to reduce their 'monthly housing costs'. This compares to 38% of all Irish citizens and may reflect the fact that non-Irish citizens were paying a higher monthly rent on average.

Importance of Public Transport Services when Choosing Property to Rent

- ▶ Public transport services were rated slightly more important when choosing their current property to rent by non-Irish citizens. 40% of non-Irish citizens claimed that public transport services were an 'important/very important factor', compared to 34% of all Irish citizens.

Awareness of Rights and Responsibilities

- ▶ Non-Irish citizens were more likely to have a written tenancy agreement (86% vs 79% of all Irish citizens).
- ▶ Their knowledge about the frequency of rent reviews was more or less on par with Irish citizens as was their awareness of the reasons a landlord can terminate a tenancy and the rights and responsibilities of landlords and tenants.
- ▶ Non-Irish citizens were less familiar with a Building Energy Rating (BER) certificate (40% were familiar compared to 50% of all Irish citizens). One in five (22%) were given a BER Certificate for their current property when they first moved in. This compares to 36% of all Irish citizens.

Property Inspections and Maintenance Requests

- ▶ Non-Irish citizens were less likely to have had a Local Authority inspection on their current property since moving in - 8% of non-Irish citizens claimed to have had an inspection vs 18% of all Irish citizens.
- ▶ However, both groups were more or less on par when it came to landlord inspections (36% of non-Irish citizens claimed to have had a landlord inspection vs 38% of all Irish citizens).
- ▶ Amongst those who had received a landlord inspection on their current property, 72% of all non-Irish citizens claimed that the inspection was carried out in the last 12 months (vs 61% of Irish citizens).

Awareness of the RTB and its Functions

- ▶ Awareness of the RTB was significantly lower amongst non-Irish citizens (36% aware vs 54% of all Irish citizens).
- ▶ However, amongst those aware of the RTB, prompted awareness of the different functions of the RTB amongst non-Irish citizens was nearly on par with Irish citizens.

Interaction with the RTB and Awareness of Advertising

- ▶ Amongst those aware of the RTB, awareness of RTB advertising and interaction with the RTB was slightly higher among non-Irish citizens.

Awareness of the RTB Dispute Resolution Service and Likelihood of Availing of Service if Needed

- ▶ Non-Irish citizens were more or less on par with Irish citizens in terms of likelihood of availing of the RTB Dispute Resolution Services if they believed that their landlord was not complying with rental laws. 61% of non-Irish citizens were 'likely/very likely' to avail of the RTB Dispute Resolution Services. This compares to 63% of all Irish citizens.

Rating of Rental Experience

- ▶ With regard to their overall experience of renting, non-Irish citizens appeared to be slightly more positive than Irish citizens, not only about their current property and neighbourhood but about renting in the private rental sector in general.
- ▶ 81% of non-Irish citizens awarded a 'positive/very positive' rating to renting their current property. This compares to 77% of all Irish citizens.
- ▶ 86% of non-Irish citizens awarded a 'positive/very positive' rating to renting in their current neighbourhood. This compares to 81% of all Irish citizens.
- ▶ Finally, 79% of non-Irish citizens awarded a 'positive/very positive' rating to their experience of living in the private sector in general. This compares to 68% of all Irish citizens.

2.13 The Experience of Older Renters aged 45+

The experience of older renters age 45+ was also examined.

This group accounted for 17% (176 respondents) of all tenants surveyed.

The profile of tenants age 45+ is set out alongside that of all private tenants in Table 2.47 below. The socio-economic profile of older renters is different in that 50% belong to the DE group (semi-skilled and unskilled manual occupations, unemployed and lowest grade occupations) compared to 33% of the total sample of private renters. Older renters are also more likely to be male (54% vs 50%), Irish Citizens (69% vs 62%) and married or divorced/widowed/separated.

Table 2.47: Sample profile of Older Renters Age 45+ vs All Private Renters

	All private renters (1,038)	Older renters age 45+ (176)
Age		
Young adults 19-24 years	13%	-
Persons aged 25-34 years	43%	-
Persons aged 35-44 years	27%	-
Persons aged 45-54 years	10%	61%
Persons aged 55-64	6%	33%
Persons aged 65+	1%	6%
Gender		
Male	50%	54%
Female	50%	46%
Socio-economic group		
AB	12%	9%
C1	28%	14%
C2	27%	27%
DE	33%	50%
Region		
Dublin	39%	39%
Leinster (excluding Dublin)	21%	23%
Munster	25%	20%
Connacht and Ulster	15%	18%
Local Authority Area (Dublin only)		
Dublin City	23%	21%
Dún Laoghaire-Rathdown	5%	7%
Fingal	6%	6%
South Dublin	5%	4%
Rent Pressure Zones		
Inside	71%	70%
Outside	29%	30%
Citizenship		
Republic of Ireland	62%	69%
Outside Republic of Ireland	38%	31%
Marital Status		
Married or Civil partnership	34%	46%
Cohabiting	22%	8%
Single – never married	31%	15%
Divorced	3%	8%
Widowed	2%	7%
Separated	4%	11%
Prefer not to say	5%	6%

	All private renters	Older renters age 45+
Dwelling Type		
Detached House	8%	11%
Semi-detached House	40%	38%
Terraced House	25%	26%
Apartment purpose built	22%	22%
Apartment / flat converted	5%	3%

Profile of Older Renters Aged 45+

- ▶ The majority (61%) of older renters were aged 45-54. One-third (33%) were aged 55-64 and the remainder (6%) were 65 years or older.
- ▶ In terms of employment status, while the majority of older renters (57%) were employed, a higher than average proportion were 'unable to work due to sickness or disability' (15% vs 4% of all private tenants) or 'retired' (9% vs 2%).
- ▶ More than one in four (26%) older renters were living alone. This compares to 12% of all private tenants.
- ▶ Amongst those renting for one year or longer, the average time renting was 8.44 years (vs 6.18 years for all private tenants).
- ▶ On average, older tenants moved into their current property 7.40 years ago (this compares to 5.02 years ago for all private tenants).
- ▶ Before moving into their current rental property, 68% of older renters were 'living in another rental property' (vs 58% of all private tenants) and 10% were 'living in a property that I owned' (vs 3% of all private tenants).
- ▶ The average number of properties rented by older renters was 2.86, whereas the average number for all private tenants was 2.43.
- ▶ Property ownership was higher amongst older renters than private renters in general (16% vs 7%).

Rent

- ▶ 'Bank transfer' was most popular (90%) as a payment method amongst older renters aged 45+.
- ▶ Prior to renting their current property, older renters were more likely than average to have to provide 'previous landlord references' (46% vs 40%) and less likely to have to provide an 'employer's reference' (22% vs 28%).
- ▶ The median deposit paid by older renters on their current property was in line with the national average (€1,000).
- ▶ The median rent paid per month by older renters for their current property was slightly higher than the national average (€900 vs €850).
- ▶ The median spend on rent as a proportion of monthly net income was also slightly higher for older renters when compared to the national average (35% vs 30%).
- ▶ Nearly one in three (30%) older renters stated that their current rent is higher than when they first moved into the property (average was 25%). The median rent increase amongst this cohort was €150 (compared to an average median rent increase of €120).

- ▶ Amongst those older tenants who stated that their rent was higher than when they first moved in, 42% had their last rent increase within the last twelve months and 38% had their last rent increase 12-24 months ago. The median rent increase at their most recent rent review was €70 – this is in line with the national average.

Rent Pressure Zones

- ▶ Amongst older renters age 45+ awareness of rent pressure zones was in line with the national average (37%).
- ▶ A total of 70% of older renters were renting inside a rent pressure zone when they were surveyed (compared to 71% of the total sample).

Rental Assistance

- ▶ Approximately one in four (26%) older renters were in receipt of rental assistance at the time this survey took place. This compares to 19% of all private tenants. A higher proportion of older renters were in receipt of 'Rent Supplement' (11% vs 5% of the total sample, whereas levels of HAP (11%) and RAS (4%) were more or less on par with the total sample.
- ▶ Amongst those older renters in receipt of rental assistance (46), the majority (59%) were paying a top-up payment to their landlord to cover the difference between their rental assistance and the cost of their rent. This compares to 66% of all private renters who were in receipt of rental assistance.

Motivations for Renting and Future Intentions

- ▶ Motivations for currently renting amongst older renters were broadly similar to the total sample ('convenient' (20%), 'suits my current situation' (20%), 'can't get a mortgage' (21%)). However, older renters were more likely to mention 'personal reasons' (26% vs 19% of the total sample) and less likely to say 'currently saving for a deposit or looking to buy a property' (10% vs 15% of the total sample).
- ▶ In terms of future intentions, 78% of older renters saw themselves renting privately in 12 months' time (compared to 84% of the total sample) and 8% saw themselves renting from the Local Authority or AHB (compared to 4% of the total sample). A small minority (8%) thought that they would become an owner occupier (house/apartment) – more or less on par with the total sample (7%).
- ▶ In the medium term (five years' time), the proportion of older renters who saw themselves renting privately decreased from 78% to 59% but this was still higher than the total sample (49%). There was an increase from 8% to 14% in the proportion of older renters who saw themselves renting from the Local Authority or AHB. This was also higher than the total sample (10%). One in five (20%) thought that they would become an owner occupier (house/apartment) – significantly lower than the total sample of private renters (34%).
- ▶ In the longer term (10 years' time), the proportion of older renters who saw themselves renting privately decreased further to 44% but this was significantly higher than the total sample (25%). The proportion of older renters who saw themselves renting from the Local Authority or AHB remained relatively unchanged at 15%. Nearly one in four (23%) thought that they would become an owner occupier, significantly lower than the total sample of private renters (50%).
- ▶ Amongst those older renters who saw themselves becoming an owner occupier within the next 12 months/5 years/10 years (40), 81% were looking to reduce their monthly housing costs or keep their monthly housing costs at roughly the same level. Amongst this same group 83% stated that they were currently 'saving for a deposit' and 23% were 'applying for a mortgage'.

Importance of Public Transport Services when Choosing Property to Rent

- ▶ When it came to rating the importance of public transport services when choosing property to rent, older renters were more or less on par with the total sample. Public transport services were deemed to be 'an important/very important factor' by 39% of older renters (compared to 36% of the total sample).

Awareness of Rights and Responsibilities

- ▶ The majority (84%) of older tenants were in possession of a written tenancy agreement and amongst this group a similar proportion (84%) claimed to have read their tenancy agreement.
- ▶ Awareness of frequency of rent reviews could be improved – 32% of older tenants did not know how often their landlord could review their rent and 14% thought that their landlord could review their rent 'as often as they wish'. These results were similar to the total sample.
- ▶ Overall prompted awareness of reasons for terminating a tenancy was slightly higher amongst older renters as was their knowledge about the rights and responsibilities of landlords and tenants. Older renters were least knowledgeable about rent pressure zones – 35% claimed 'no knowledge at all' (compared to 40% of all tenants).

Property Inspections and Maintenance Requests

- ▶ Nearly two-thirds (63%) of older renters stated that an inventory was carried out on their current property when they first moved in (compared to 55% of all tenants).
- ▶ The majority (52%) of older renters were familiar with a Building Energy Rating (BER) certificate and 37% were given a BER certificate when they first moved into their current property.
- ▶ One in five (20%) older renters said that a Local Authority inspection was carried out since moving into their current property, higher than the sample average (14%).
- ▶ As was the case with the total sample, the incidence of landlord inspections amongst older renters was more than double that of Local Authority inspections – 41% of older renters had received an inspection of their current property by their landlord. Half (50%) of these landlord inspections were carried out within the last 12 months (compared to 65% of the total sample).
- ▶ Maintenance requests were made by the majority (54%) of older renters while living in their current property (vs 47% of all tenants). The type of requests made were similar to that of the total sample – a 'broken large appliance' (38%), 'plumbing' (36%) and a 'broken small appliance' (29%). A higher proportion of older renters have undertaken maintenance work in their current property that should have been brought to the landlord or letting agent's attention (34% vs 26% for the total sample).

Property Facilities/Services

- ▶ Older renters were somewhat less likely to have services included in their monthly rent payments (39% any services vs 45% of the total sample). Services most likely to be included are 'bins or waste collection' (27%) and 'parking' (24%).

Rating of Rental Experience

- ▶ Overall, older renters' experience of renting and living in the private rental sector was positive and in line with the total sample.
- ▶ Older renters were most positive about renting in their neighbourhood (84% positive/very positive), followed by their current property (81% positive/very positive) and living in the private rental sector in general (75% positive/very positive).

- ▶ However, as was the case with the total sample, the majority of older renters rated their experience 'positive' rather than 'very positive' which suggests that the rental experience could be improved.

2.14 Summary of Key Findings

This section of the report presents a summary of the key findings from the nationally representative face-to-face survey of private tenants.

Profile of Tenants in the Private Rental Sector

- ▶ In terms of socio-economic group, 60% of tenants were C2DE and 40% were ABC1.
- ▶ The majority (56%) were in full-time employment.
- ▶ In terms of marital status, 56% were either married or cohabiting. Nearly one in three (31%) were single (never married).
- ▶ Non-Irish citizens accounted for 38% of all tenants surveyed and the majority (52%) of non-Irish citizens were EU citizens. A significant proportion (43%) of non-Irish citizens were 'rest of the world' citizens.
- ▶ The most common dwelling type at a national level was a semi-detached house (40%). Apartments (purpose-built or other) accounted for 27% of all dwellings. In Dublin, the most common dwelling type was an apartment – 44% of tenants were renting an apartment (purpose-built or other).
- ▶ The average number of occupants living in a rented property was 3.04.
- ▶ The vast majority (85%) of tenants were sharing their rented property. 'Living with my spouse or partner with children' (34%) was the biggest single category followed by 'living with others (sharing)' at 24%. Of all tenants surveyed, 12% were 'living alone'.
- ▶ The average tenant has been renting in the private rental sector for 5.01 years.
- ▶ The average tenant has been renting in their current property for 3.79 years.
- ▶ The average number of properties rented in Ireland was 2.32. Nearly one in ten (9%) had rented five or more properties.
- ▶ Prior to moving into their current property, 58% of all tenants were living in another rental property.
- ▶ It is clear from these results that the majority of tenants surveyed had a history of renting in the private rental sector.

Rent

- ▶ The majority (83%) of tenants surveyed who were paying rent were paying 'directly to a landlord'.
- ▶ 'Bank transfer' was the most common method used to pay rent (85%). The remaining 15% of tenants paid with 'cash'.
- ▶ Prior to renting their current property, a significant proportion (59%) of tenants were required to provide the landlord with documentation. 'Previous landlord references' were most often required (40%) followed by an 'employer's reference' (28%). It is worth noting that 41% of tenants were not required to provide the landlord with any documentation.
- ▶ The vast majority (87%) of tenants paid a deposit when first renting their current property. The median deposit paid was €1,000 at a national level and €1,450 in Dublin. Amongst those tenants who paid a deposit, 88% paid one month's rent as the deposit.
- ▶ The median rent paid per month in total for the property was €1000 at a national level and significantly higher in Dublin (€1,500) vs outside Dublin (€800).

- ▶ Nearly half (48%) of all tenants surveyed believed that the rent they paid was 'in line with similar properties' in their area. One in five (21%) believed it was 'lower than similar properties' in their area.
- ▶ The median individual monthly rent paid by tenants for their current property was €850 at a national level and significantly higher in Dublin (€1,400) vs outside Dublin (€700).
- ▶ There is a general rule that accommodation costs, in the form of rent or mortgage payments, should not be greater than roughly one-third of a household's disposable income. The survey results indicate that the median spend on rent (excluding bills, service charges etc) was 30% of monthly net income (after tax) and therefore in line with what is normally recommended. Half (50%) of all tenants who answered this question said that they spent 30% or less of their monthly net income on rent. A similar proportion spent more than 30% of their monthly net income on rent, with 12% claiming that they spent more than 50% of their monthly net income on rent.
- ▶ The vast majority (94%) of tenants indicated that they were able to pay their monthly rent on the date it was due within the last 12 months of being surveyed.
- ▶ One in four (25%) tenants indicated that their current rent was higher than when they first moved in. Amongst this group, the median rent increase was €120 at a national level and €200 in Dublin. The majority (54%) of these tenants had their most recent rent increase within the last 12 months of being surveyed. At the most recent rent review the median rent increase was €70 at a national level and significantly higher in Dublin (€100) vs outside Dublin (€50).

Rent Pressure Zones

- ▶ Awareness of rent pressure zones is low overall - 37% of all tenants stated that they know what a rent pressure zone is.
- ▶ A total of 71% of tenants were renting inside a rent pressure zone when they were surveyed. Yet only 41% of these tenants were aware of rent pressure zones.

Rental Assistance

- ▶ Approximately one in five (19%) of all tenants surveyed stated that they were in receipt of rental assistance.
- ▶ Amongst those in receipt of rental assistance, 58% were receiving Housing Assistance Payment (HAP), 26% were receiving Rent Supplement and 16% were on the Rental Accommodation Scheme (RAS).
- ▶ A top-up payment was made to the landlord by two-thirds (66%) of all tenants in receipt of rental assistance. The median top-up paid was €200 per month.

Motivations for Renting and Future Intentions

- ▶ Motivations for renting were driven mainly by convenience, flexibility and the fact that some tenants 'can't get a mortgage'. In addition, 15% of tenants stated that they were 'currently saving for a deposit or looking to buy a property'.
- ▶ In terms of future intentions, the vast majority (84%) of tenants surveyed saw themselves still renting (house/apartment) in 12 months' time. A small minority (7%) thought they would become an owner occupier (house/apartment) and 4% saw themselves renting from the Local Authority or AHB.
- ▶ In the medium term (5 years' time), the proportion who saw themselves becoming an owner occupier increased from 7% to 34% and the proportion who saw themselves still renting declined from 84% to 49%. One in ten (10%) saw themselves renting from the Local Authority or AHB during this period.
- ▶ In the longer term (10 years' time), a higher proportion saw themselves becoming an owner occupier than still renting (50% vs 25%). The proportion who saw themselves renting from the Local Authority or AHB stayed roughly the same (11%).

- ▶ Amongst those tenants who saw themselves becoming an owner occupier within the next 12 months/5 years/10 years, 74% were looking to reduce their monthly housing costs or keep their monthly housing costs at roughly the same level. Amongst this same group 69% stated that they were currently 'saving for a deposit' and 14% were 'applying for a mortgage'.
- ▶ When choosing their current property to rent, public transport was deemed to be a factor by 58% of all respondents. More than a third (36%) stated that it was 'an important/very important' factor but 42% stated it was 'not at all a factor'.

Awareness of Rights and Responsibilities

- ▶ The majority (82%) of tenants were in possession of a written tenancy agreement and amongst this group a similar proportion (84%) claimed to have read their tenancy agreement.
- ▶ Awareness of frequency of rent reviews could be improved – more than a third (35%) of tenants did not know how often their landlord could review their rent and 12% thought that their landlord could review their rent 'as often as they wish'.
- ▶ Prompted awareness of reasons for terminating a tenancy was quite high. 'The tenant has breached their responsibilities' was mentioned most often (86%) followed by 'the landlord wants to sell the property' (83%). However, only 52% of tenants were aware that a tenancy could be terminated 'if a tenancy had lasted less than 6 months'.
- ▶ Respondent knowledge about the rights and responsibilities of landlords and tenants was also quite high with the majority of respondents claiming to have some/a lot of knowledge on a number of issues including rent increases, notice of termination or notice to quit, tenants' responsibilities for the upkeep of the property, rights of the landlord to enter the property and rent pressure zones. Tenants were least knowledgeable about rent pressure zones – 40% claimed 'no knowledge at all'.

Property Inspections and Maintenance Requests

- ▶ The majority (55%) of tenants stated that an inventory was carried out on their current property when they first moved in.
- ▶ Fewer than half (46%) of all tenants were familiar with a Building Energy Rating (BER) certificate and less than one in three (31%) tenants stated that they were given a BER certificate when they first moved into their current property.
- ▶ A Local Authority inspection was carried out in 14% of cases since moving into the current property. Tenants stated that the majority (65%) of these Local Authority inspections were carried out within the last two years and (almost half (48%) of tenants said that the inspection identified an issue that the landlord must fix.
- ▶ The incidence of landlord inspections was more than double that of Local Authority inspections – 37% of tenants had received an inspection of their current property by their landlord. The majority (65%) of these inspections were carried out within the last 12 months.
- ▶ Maintenance requests were made by 47% of all tenants while living in their current property. The most common maintenance requests related to broken appliances (large/small) and plumbing. In the vast majority of cases it was the landlord or letting agent who undertook the maintenance (92%) and who incurred the full cost of maintenance (98%). One in four (26%) tenants stated that they had undertaken maintenance work in their current property that should have been brought to the landlord or letting agent's attention, but when asked 80% of tenants admitted that the maintenance was simple enough for them to do themselves.
- ▶ A small proportion of tenants reported that their current property had issues – 'damp or mould' was the main mention (11%).

Property Facilities/Services

- ▶ The services most likely to be included in monthly rent payments were ‘bins or waste collection’ (31%) and ‘parking’ (25%). Tenants renting an apartment (purpose-built or otherwise) were twice as likely to have services included in monthly rent as tenants renting a house.

Rating of Rental Experience

- ▶ Overall, the results of the survey indicate that tenants’ experience of renting and living in the private rental sector was positive.
- ▶ Tenants were most positive about renting in their neighbourhood (83% positive/very positive), followed by their current property (79% positive/very positive) and living in the private rental sector in general (72% positive/very positive).
- ▶ However, the majority rated their experience ‘positive’ rather than ‘very positive’ which suggests that the rental experience could be improved.

2.15 The Qualitative Findings

2.15.1 Methodology

A total of five focus groups were conducted with tenants living in the private rental sector. The first focus group was exploratory and was conducted in July 2019. An additional four focus groups were conducted via Zoom video-conferencing service in December 2020 after the main tenant survey to explore some of the findings from the quantitative research in more detail.

The four main focus groups included a mix of long-term and short-term private renters as follows:

- ▶ Two general tenant focus groups – one with tenants renting in Dublin and another with tenants renting outside Dublin.
- ▶ One with Non-Irish Nationals living in the private rental sector.
- ▶ One with older people aged 45+ living in the private rental sector.

Group	Region	Tenure type	Age	Nationality
1	Ex-Dublin	Private Renters	19-44	Irish
2	All RoI	Private Renters	19-54	Non-Irish
3	Dublin	Private Renters	19-44	Irish
4	All RoI	Private Renters	45+	Irish

Respondents were recruited from the Amárach Research Panel to join the focus group discussions which were undertaken using Zoom.

There was a broad framework for discussion at each group. This included the following topics:

- ▶ An introduction to the Research Programme
- ▶ A sense of the market pre Covid-19 and now
- ▶ Current tenure
- ▶ The housing journey
- ▶ The economics of renting

- ▶ The impact of Covid-19
- ▶ The Residential Tenancies Board
- ▶ Rental Pressure Zones

This section of the report presents the main findings from the four main focus groups.

2.15.2 Research Outcomes

The Sense of the Rental Market Currently

Unsurprisingly tenants see the rental market as very challenging. There is limited choice and availability and the cost of rents have risen significantly in the last decade.

Many are fearful of losing tenure and the consequence of having to go back onto the rental market. One woman who was a single mother living in a property for several years outlined that her landlord had indicated that it was now going on the market to be sold. Her current rental property is located in Southwest Dublin. She described her challenges as including:

- ▶ Finding a property within her budget (she was in receipt of HAP). She is a sole parent rearing two children.
- ▶ Finding a property locally which would minimise the disruption to her children's education and ensure continuity of schooling (one child has special needs).
- ▶ Finding a property that would be close to her work (in time, financial and commuting terms) given that she was a nurse and worked shifts in a hospital.

Other tenants described the build-up of anxiety coming up to the renewal of leases – and starting mentally and metaphorically gearing up to the task of going back into the market.

They believe that they are entering the unknown in coming back into the market. They are swapping stability for uncertainty and an unknown outcome.

The vast majority would like to own their own property. A minority are clearly on the journey to achieving that goal – saving to achieve that elusive deposit. Those who were on this path were typically a younger couple who appeared to have two permanent jobs and who did not appear to have other commitments. Some of the non-nationals were also on that path and in a different path financially to some others.

A far greater number see no real path away from renting. Some had owned property previously but for various reasons, often family circumstances, they believed that they had no financial option now and in the future other than to rent. Fundamentally they believed that they were locked out of the purchase market because of high house prices. They believed that they would not qualify for a mortgage because there was a sole earner in a family, or they were dependent on disability benefits.

The absence of supply in larger urban areas leads them to believe that landlords have a huge choice as to who they select as tenants. This can make it difficult for families with young children to find properties simply because of less wear and tear.

The absence of alternatives, even psychologically, means that one is less likely to complain about living conditions and make a fuss.

It can be hard to find property going through established channels such as myhome or Daft. Informal referral can be more effective. One non-national renter used his work colleagues to find a property in Citywest in Dublin 24.

The absence of choice can also result in additional expenditure being incurred – e.g. the need to have a car to commute from the rental property to work.

In rural areas, the absence of property can be absolute. One non-national described searching for property in Tullamore while she completed a medical placement for her College programme. She was effectively homeless for four months and eventually got a room to rent in a shared house.

They, as tenants, typically didn't initiate a move away from a property unless there is a lifestyle change driven by career. The landlord typically put the property on the market and they reacted. Some, particularly the older renters, have been in their property for a considerable period of time. In this group all had been renting for ten years or more and most had last moved over four or five years ago.

New Irish Experience of the Market is no Different to Others

Those who have migrated to live in Ireland have similar perspectives to the other groups. They highlighted similar challenges:

- ▶ Cost of property as a percentage of take-home pay.
- ▶ Lack of supply.
- ▶ Challenges of finding a place when there are children.
- ▶ Fear of upsetting landlords through complaints about the standard of accommodation.

What people who are new to Ireland are looking for in a rental property is no different to those who were born here. They do have the advantage of experiencing other rental markets abroad and so their perspectives are certainly influenced by the contrast to this market. One contrasted the experience of renting in the Netherlands where there appeared to be far greater stability and predictability in the market relative to Ireland.

As with other groups, some are on a path to buy their own properties, trying to overcome the same challenges and barriers as other renters.

Tenure Experience

Most had moved multiple times, one had lived in 22 properties, others had lived in six or seven properties in eighteen years. Tenure appeared typically to last.

They vary as to whether they see themselves as renting a house or a home. Women tend to think of the property they are living in as a home, while men are more likely to think of it as a house.

Most like where they live. There was no real sense of a difference between urban or rural in this regard. One had sold his house in Dublin with a view to moving to a 'safer' place to rear his children. Having been gazumped on price for a property in Meath he opted to rent there. His family circumstance changed through illness. He envisaged never again being in a position to buy.

Most attendees rent because they have to rather than because they want to. There are some in the early stages of their lives who are saving for a property and have plans to purchase, but undoubtedly most who have been renting for a considerable period would prefer to own their own home. It would give them greater certainty and security.

The other advantage of renting which was frequently cited in these groups was the absence of responsibility for maintenance and repair. They liked the fact that if something went wrong, they could simply call either the landlord or an agent and ask for it to be fixed. This was particularly the case for the younger renters.

There were two groups:

1. Those who were saving to buy and anticipated doing so in the next few years.

These were a minority of attendees. For these the choice of where to rent was largely driven by cost minimisation so that they could continue to save. They are focusing more on purchasing rather than renting. They could probably afford to spend more on rent, but have chosen not to.

2. Those who were not in a position to buy currently. These split into two groups:

Those who thought that at some point in the future (e.g. when the children are grown up) that they would buy. Those who felt that unless there was some fundamental change in the market they would never be in a position to buy.

The two key drivers for them in selecting property are effectively negative:

- ▶ Whether a house will be available at all in a chosen location.
- ▶ Whether the house will be affordable to their budget – the affordability issue is a huge one. Many of the people that we talked to were spending far more on rent than they would spend on a mortgage for an equivalent property. One described moving from Bray to Balbriggan for affordability reasons several years ago but that the affordability ‘gain’ had been eroded and she was back where she started.

There are criteria that are fundamental to their needs and will have to be met. These narrow down the search criteria at the outset.

- ▶ Children’s schooling and minimising disruption. There was truth to the adage that they were only as happy as their unhappiest child.
- ▶ Within commuting capability to work.

The Property Search

The property search length varies but for the non-national group as an example the length of time varied from 2 months to 6 months and as one said *“I was happy to find something at all”*.

The non-nationals search experience did appear to take longer but none of the attendees articulated that as being because they were not Irish. There was a sense from this group that it took some time to come to terms with the market (predominantly the absence of choice and the high cost) particularly if they had been renting elsewhere before they came to live in Ireland.

The difficulty in finding a property also has knock-on impacts on what people are prepared to put up with. Despite the fact that it appears to be the largest personal financial cost per month, they believe that their options are limited, and they cope with what they have.

The Negatives about Renting

The things that they dislike about renting are unsurprising:

“It is dead money” it is an expensive purchase with no value built up. The scale of their rent as a proportion of their take home pay means that most have little opportunity to save for a property of their own.

Tenure – they feel that ultimately they are not in control. There is always the nagging doubt that the tenancy could come to an end and they will be back at square one. Tenure is clearly about housing but it also impacts on all other aspects of life – including children’s education, commuting, job opportunities. *“Tenure worries you on a regular basis”*.

Pricing is out of their control and not linked to income. Several described spending more than 50% of their take home income salary on rent, while others highlighted that their salaries had been effectively frozen since 2009.

Future planning. Older renters in particular don’t know what will happen after they retire. One cited his hope that ultimately he would end up as a local authority tenant where his rent would be manageable, predictable and linked to his income (a state pension).

Control. Fundamentally they lack control over a key part of their lives. The nature of the market over the last decade has, in their view, made it harder for tenants to establish predictability and control.

Relationships with Landlords

There was no real evidence in these groups of the stereotypical relationship with landlords. Most were positive about the landlord and the relationship. Some described how they felt that their landlord was being fair in not automatically increasing the rent.

Where they had had to move out of a property it was usually because the landlord had decided to sell or renovate the property.

While the majority described their landlord agent relationship in positive rather than neutral terms, there is an underlying fear of speaking out of turn or creating trouble. That was perceived to possibly lead to trouble and being back on the market with all the complexities that that brings. This includes not complaining about damp. One older renter described how the boiler broke and the replacement cost of €2,000 was met by the landlord. There is also a general perception that landlords would prefer not to rent to families with children, that they simply cause too much wear and tear on fixtures and fittings.

Affordability

Affordability is clearly linked to their take home pay. Many pointed out that while pay has stayed relatively static over the past decade, rents have increased exponentially in the same timeframe.

They see no prospect of income increasing to the point where rent comes back into a 'reasonable' proportion of their income. Many are paying a higher proportion of their salaries in rent than the cost of a mortgage on a property. Some are paying close to 50% of take home pay to landlords.

Those with families clearly had higher expenses and commitments – childcare, education etc. and they are the ones with the greatest absence of choice in the market.

No-one really considered that what they had in terms of rental property represented value for money.

The measure for affordability is whether they can make the rent payment and meet other commitments – but in reality given the absence of perceived choice, it is a battle many face on a monthly basis.

Where people are renting in a complex, rent typically includes bins and service charges. If they are renting elsewhere (e.g. a house), no real benefits were highlighted.

In each group there were tenants who availed of HAP. In one case the property that the tenant had been able to afford had been assisted by the fact that her rent had not been increased by the landlord. Now that the landlord was selling the property, she believed that she would struggle to find a comparable property for a similar price.

One woman renting in Laois stated that she was eligible for HAP but didn't apply for it because she thought it would limit her chances of getting a property. She perceived that the local authority in Laois had a very negative perception of such supports and that it would not be in her favour if she applied for it.

Regulatory Awareness

Virtually all were aware of the impact of Rental Pressure Zones (RPZs), even though they did not know them by name. RPZs were perceived positively in that they had put a stop to rapid increase in rental property prices. They were perceived as a negative where landlords viewed it as a licence to simply up the rent by 4% per annum, even though wages had not gone up by the same amount.

The attendees were also aware of the revised regulatory regime put in place as a reaction to the pandemic. In reality only a small number of those who were renting had been impacted, one as a bar manager worked in the licenced trade. Those that were impacted were hopeful of resumption to normal business in the short term. Bear in mind that these focus groups took place as the country was opening up after the second lockdown and before the third lockdown was put in place at the end of December 2020.

There is widespread awareness of the Residential Tenancies Board. They understand the role of the RTB in relation to regulating the market. They are aware of the processes about property registration and the rights and responsibilities of both landlords and tenants. Most had come across recent advertising and communication by the RTB.

None appeared to have been in a formal dispute process with their landlord run by the RTB. They were aware that they could get advice from a number of different organisations. Among those mentioned were Threshold; Citizen's Information as well as the RTB. In truth, most seemed to have reasonable relationships with their landlords or letting agents.

The Future

Those who are on a purchase path see more control in the future.

On the other hand those who foresee a life of renting see uncertainty and upheaval. They lack any real predictability and control. The fragility of tenure is a constant background noise, not always in the short term but definitely in the medium and long term.

They see rent as taking an increasing portion of their take home pay. No-one could describe a career trajectory that would change materially with an impact on take home pay. On the other hand they saw that while RPZs had impacted positively on cooling down the level of rent increases, others say that it is simply a licence for landlords to increase the rent by 4% per annum, far above their take home pay increases.

For older renters, a crunch will come when they reach retirement.

For renters to achieve greater clarity and certainty about the future, the following factors will need to be addressed in the market:

- ▶ **Supply.** The lack of availability and choice is a fundamental issue in the market. If a lease is ended tenants have no predictability of where they will go. This is especially challenging where people have children of school going age.
- ▶ **Cost.** When tenants are describing spending up to 50% of their take home salary on rental costs, clearly there is no headroom for further expenditure. Wages and salaries will not rise to the extent that the proportion of take home pay spent on rent will decline. For rent proportion to halve, take home pay would have to double. In some groups, particularly the non-national group, the issue of not being able to write off any rental cost against tax was highlighted.
- ▶ **Central Bank rules on mortgages.** Most felt that their opportunity to buy was impacted by the mortgage rules in place. They simply did not have the capacity to save for the required deposit.

Conclusions

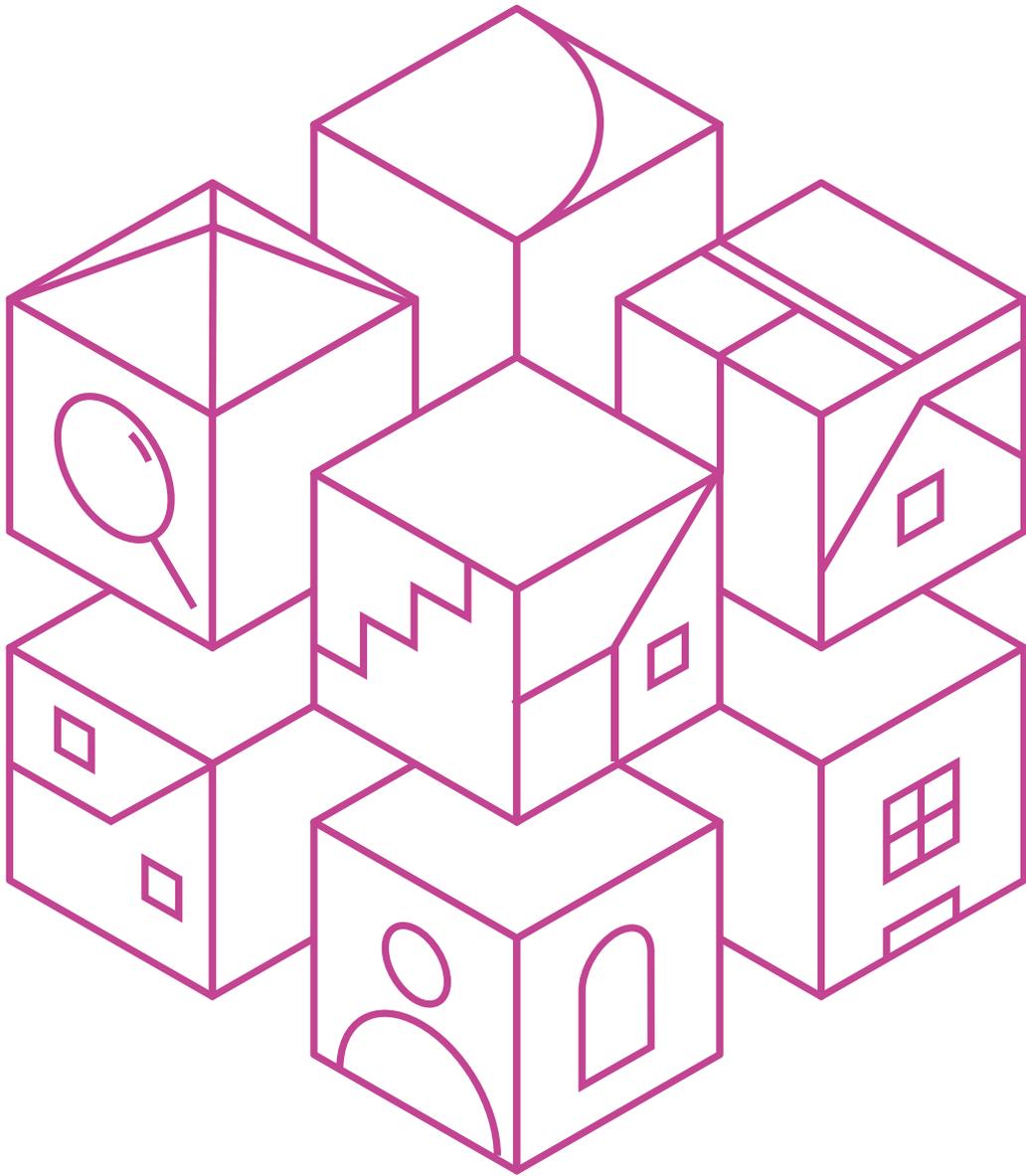
Across all groups the key attribute that they lack is predictability.

Even where they have been living in a house for a considerable period, have an excellent relationship with the landlord and a stable rent, they believe that they lack control.

Clearly one aspect of the market at the macro level, that they don't articulate but which is driving some of the uncertainty, is the exit of smaller landlords from the market.

Their housing tenure as renters is most impacted by the decision of landlords to dispose of properties. They articulate these events as a one off in their case, but it is an experience that was a driver behind many of the moves that they made as renters.

Appendices



Appendix 1

Additional tables

Table A1.1: Q70a Rating of overall experience of renting this property (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Very negative (1.00)	1%	1%	1%	1%	1%	0	0	1%	2%	1%	1%
Negative (2.00)	2%	3%	1%	5%	1%	2%	3%	1%	3%	2%	2%
Neutral (3.00)	18%	24%	18%	15%	17%	17%	14%	21%	19%	20%	15%
Positive (4.00)	57%	56%	59%	55%	54%	55%	60%	55%	56%	55%	59%
Very positive (5.00)	22%	16%	21%	24%	26%	26%	23%	22%	20%	22%	22%
Negative	3%	3%	2%	6%	3%	2%	3%	3%	5%	3%	3%
Positive	79%	73%	80%	79%	81%	81%	84%	76%	76%	77%	81%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Very negative (1.00)	1%	1%	2%	1%	1%	1%	1%	1%	1%	1%
Negative (2.00)	2%	1%	2%	3%	3%	2%	3%	2%	3%	2%
Neutral (3.00)	18%	18%	10%	18%	19%	17%	20%	20%	17%	18%
Positive (4.00)	57%	58%	59%	56%	55%	57%	56%	62%	54%	58%
Very positive (5.00)	22%	22%	27%	22%	21%	23%	19%	16%	26%	21%
Negative	3%	2%	4%	4%	4%	3%	4%	3%	4%	3%
Positive	79%	80%	87%	78%	76%	80%	76%	77%	80%	78%

Q70a Overall, how would you rate your experience of renting this property?

Table A1.2: Q70b Rating of overall experience of renting in this neighbourhood (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Very negative (1.00)	*	1%	*	1%	0	0	0	1%	*	1%	0
Negative (2.00)	2%	3%	1%	2%	2%	0	*	1%	4%	2%	1%
Neutral (3.00)	15%	18%	17%	11%	13%	15%	13%	16%	16%	16%	13%
Positive (4.00)	58%	56%	59%	58%	55%	57%	58%	58%	57%	57%	59%
Very positive (5.00)	26%	23%	23%	28%	30%	28%	29%	24%	23%	24%	27%
Negative	2%	4%	1%	3%	2%	0	*	2%	4%	3%	1%
Positive	83%	78%	82%	86%	84%	85%	87%	82%	80%	81%	86%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Very negative (1.00)	*	*	0	*	*	*	*	*	*	*
Negative (2.00)	2%	1%	2%	2%	2%	1%	3%	3%	1%	2%
Neutral (3.00)	15%	15%	11%	15%	15%	15%	16%	17%	14%	15%
Positive (4.00)	58%	58%	55%	57%	58%	56%	60%	59%	53%	61%
Very positive (5.00)	26%	25%	32%	26%	25%	28%	20%	20%	32%	21%
Negative	2%	1%	2%	2%	3%	1%	3%	3%	1%	2%
Positive	83%	83%	88%	83%	82%	84%	81%	80%	85%	83%

Q70a Overall, how would you rate your experience of renting this property?

Table A1.3: Q70c Rating of overall experience of renting in the private rental sector in general (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Very negative (1.00)	1%	1%	1%	2%	2%	2%	1%	2%	1%	2%	1%
Negative (2.00)	6%	9%	5%	8%	4%	8%	6%	7%	5%	7%	4%
Neutral (3.00)	20%	20%	23%	17%	19%	19%	20%	19%	22%	23%	16%
Positive (4.00)	54%	53%	55%	51%	58%	57%	53%	55%	53%	51%	60%
Very positive (5.00)	18%	16%	15%	23%	18%	15%	20%	17%	18%	17%	19%
Negative	8%	11%	7%	9%	6%	9%	7%	9%	7%	10%	5%
Positive	72%	69%	70%	74%	75%	72%	73%	72%	71%	68%	79%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1 yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Very negative (1.00)	1%	2%	2%	1%	*	2%	*	3%	*	2%
Negative (2.00)	6%	4%	6%	8%	8%	5%	9%	7%	8%	5%
Neutral (3.00)	20%	19%	16%	21%	22%	20%	21%	26%	17%	21%
Positive (4.00)	54%	58%	53%	51%	51%	55%	52%	52%	52%	57%
Very positive (5.00)	18%	16%	22%	19%	19%	18%	17%	12%	23%	16%
Negative	8%	7%	8%	8%	9%	7%	9%	10%	8%	6%
Positive	72%	74%	75%	70%	69%	73%	70%	64%	75%	72%

Q70c Overall, how would you rate your experience of living in the private rental sector in general?

Table A1.4: Q41a Whether looking to reduce, increase or keep monthly housing costs the same excluding tenants who did not see themselves as owner occupier in 12 months /5 yrs/10 yrs (n=507)

	Total (507)	Age				Social Class				Citizenship	
		19-24 (67)	25-34 (269)	35-44 (131)	45+ (40)*	AB (89)	C1 (198)	C2 (135)	DE (85)	Irish Citizen (331)	Non-Irish Citizen (173)
Reduce your monthly housing costs	43%	39%	44%	40%	52%	49%	36%	46%	49%	38%	52%
Keep your monthly housing costs at roughly the same level	31%	26%	29%	37%	29%	23%	31%	35%	31%	33%	27%
Increase your monthly housing costs	7%	10%	9%	2%	6%	3%	9%	6%	6%	8%	5%
Don't know	19%	25%	18%	21%	13%	25%	23%	12%	14%	21%	16%

	Total (507)	Region				RPZ		Renting in Total		
		Dublin (218)	GDA (47)*	Non-Dublin (289)	Non-GDA (242)	Inside RPZ (372)	Outside RPZ (135)	Renting <1yr (114)	Renting 1-4yrs (234)	Renting 5+yrs (160)
Reduce your monthly housing costs	43%	48%	58%	39%	36%	44%	41%	42%	46%	40%
Keep your monthly housing costs at roughly the same level	31%	20%	36%	40%	40%	27%	41%	26%	32%	33%
Increase your monthly housing costs	7%	4%	0	9%	11%	6%	9%	12%	6%	5%
Don't know	19%	29%	7%	12%	13%	23%	9%	20%	17%	22%

*Caution: low base

Q41a If you were to buy, would you be looking to...

Table A1.5: Q41c Amount saved so far excluding tenants who were not currently saving for a deposit (n=349)

	Total (349)	Age				Social Class				Citizenship	
		19-24 (37)*	25-34 (186)	35-44 (93)	45+ (34)*	AB (67)	C1 (128)	C2 (106)	DE (49)*	Irish Citizen (224)	Non-Irish Citizen (123)
Less than €1000	9%	7%	10%	10%	3%	5%	5%	14%	13%	9%	10%
€1000 - €4999	12%	4%	12%	10%	29%	17%	8%	12%	18%	14%	9%
€5000 - €9999	4%	2%	5%	4%	5%	4%	4%	6%	1%	5%	4%
€10000 - €14999	6%	9%	5%	8%	0	5%	4%	8%	7%	6%	6%
€15000 - €19999	2%	7%	1%	2%	2%	0	4%	1%	1%	2%	2%
€20000 - €24999	1%	0	1%	3%	0	3%	1%	1%	1%	2%	1%
€25000 - €29999	5%	3%	5%	5%	3%	0	6%	5%	6%	5%	3%
€30000 - €34999	1%	3%	1%	2%	0	0	3%	1%	0	2%	1%
€35000 - €39000	1%	0	1%	1%	0	2%	1%	0	0	1%	0
More than €40000	6%	3%	5%	7%	12%	10%	8%	1%	3%	4%	8%
Refused	53%	63%	55%	49%	46%	56%	56%	51%	48%	51%	56%
Mean €	15782.56	15469.63	14546.30	17386.34	17474.55	19239.72	21867.01	9465.48	11207.74	14549.34	18275.84

	Total	Region				RPZ		Renting in Total		
	(349)	Dublin (159)	GDA (41)*	Non-Dublin (190)	Non GDA (150)	Inside RPZ (256)	Outside RPZ (94)	Renting <1 yr (71)	Renting 1-4yrs (171)	Renting 5+yrs (108)
Less than €1000	9%	9%	4%	9%	10%	7%	13%	10%	7%	12%
€1000 - €4999	12%	7%	21%	17%	16%	12%	13%	8%	13%	15%
€5000 - €9999	4%	3%	16%	5%	2%	6%	1%	4%	3%	6%
€10000 - €14999	6%	7%	8%	4%	3%	7%	3%	4%	7%	5%
€15000 - €19999	2%	2%	2%	2%	2%	2%	2%	3%	3%	0
€20000 - €24999	1%	1%	2%	1%	1%	1%	2%	0	3%	0
€25000 - €29999	5%	6%	2%	4%	4%	5%	5%	8%	4%	4%
€30000 - €34999	1%	1%	0	2%	2%	1%	3%	4%	*	1%
€35000 - €39000	1%	1%	0	0	0	1%	0	1%	1%	0
More than €40000	6%	8%	0	3%	4%	6%	5%	8%	5%	4%
Refused	53%	53%	45%	53%	55%	53%	54%	50%	54%	53%
Mean €	15782.56	20402.47	7542.22	11950.44	13441.60	16002.00	15175.90	20836.72	15898.23	12056.17

Q41c Using this card, please tell me which letter describes how much you have saved so far?

Table A1.6: Q38 Rating of importance of public transport services when choosing current property to rent (1,038)

	Total	Age				Social Class				Citizenship	
	(1038)	19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Not at all a factor	42%	34%	44%	44%	37%	33%	36%	42%	49%	44%	39%
Somewhat of a factor	22%	26%	21%	20%	23%	22%	23%	21%	21%	22%	21%
An important factor	16%	20%	16%	15%	16%	20%	25%	12%	12%	16%	17%
A very important factor	20%	20%	19%	20%	23%	25%	17%	25%	17%	18%	23%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1 yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Not at all a factor	42%	20%	40%	55%	58%	29%	73%	36%	33%	53%
Somewhat of a factor	22%	22%	20%	21%	22%	25%	15%	25%	25%	17%
An important factor	16%	26%	16%	10%	9%	22%	4%	19%	18%	13%
A very important factor	20%	31%	23%	13%	11%	25%	8%	20%	24%	16%

Q38 How much of a factor were public transport services when choosing this property to rent?

Table A1.7: Q42 Whether have a written tenancy agreement (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Yes	82%	70%	82%	87%	84%	86%	84%	83%	78%	79%	86%
No	13%	23%	12%	9%	12%	11%	10%	13%	14%	15%	8%
Don't know	5%	7%	6%	4%	4%	3%	6%	4%	8%	6%	5%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Yes	82%	87%	86%	78%	77%	83%	79%	82%	83%	81%
No	13%	9%	11%	15%	16%	11%	15%	12%	12%	13%
Don't know	5%	4%	3%	7%	7%	6%	6%	6%	6%	5%

Q42 Do you have a written tenancy agreement?

Table A1.8: Q44a Awareness of frequency of rent reviews (n=997)

	Total (997)	Age				Social Class				Citizenship	
		19-24 (131)	25-34 (426)	35-44 (269)	45+ (171)	AB (117)	C1 (280)	C2 (272)	DE (327)	Irish Citizen (624)	Non-Irish Citizen (367)
Every 12 months	30%	27%	30%	33%	27%	45%	31%	32%	22%	32%	27%
Every 24 months	23%	16%	23%	23%	28%	22%	22%	27%	22%	21%	27%
As often as they wish	12%	12%	13%	10%	14%	10%	6%	18%	14%	14%	9%
Don't know	35%	45%	34%	34%	32%	24%	41%	24%	43%	34%	37%

	Total (997)	Region				RPZ		Renting in Total		
		Dublin (390)	GDA (102)	Non-Dublin (606)	Non-GDA (504)	Inside RPZ (697)	Outside RPZ (300)	Renting <1yr (187)	Renting 1-4yrs (419)	Renting 5+yrs (391)
Every 12 months	30%	39%	24%	24%	24%	32%	24%	30%	29%	31%
Every 24 months	23%	23%	37%	23%	20%	24%	22%	14%	27%	23%
As often as they wish	12%	13%	10%	11%	12%	11%	15%	9%	11%	15%
Don't know	35%	25%	29%	41%	44%	33%	39%	47%	33%	31%

Q44a How often can your landlord review your rent?

Table A1.9: Q44b Prompted awareness of reasons a landlord can terminate a tenancy (n=997)

	Total (997)	Age				Social Class				Citizenship	
		19-24 (131)	25-34 (426)	35-44 (269)	45+ (171)	AB (117)	C1 (280)	C2 (272)	DE (327)	Irish Citizen (624)	Non-Irish Citizen (367)
The tenant has breached their responsibilities	86%	92%	87%	84%	84%	91%	88%	89%	81%	87%	86%
The landlord wants to sell the property	83%	82%	83%	83%	83%	87%	78%	83%	85%	83%	83%
The landlord intends to undertake significant refurbishment of the property	74%	69%	74%	72%	80%	74%	70%	78%	74%	77%	70%
The use of the property is changing	65%	60%	65%	65%	67%	76%	57%	60%	71%	64%	66%
The landlord requires the property for personal or family use	64%	66%	61%	67%	66%	62%	57%	67%	69%	64%	64%
The property is not suited to the tenants needs	62%	69%	60%	59%	63%	58%	57%	61%	68%	61%	62%
If a tenancy has lasted less than 6 months	52%	50%	51%	53%	56%	57%	43%	49%	61%	50%	57%

	Total (997)	Region				RPZ		Renting in Total		
		Dublin (390)	GDA (102)	Non-Dublin (606)	Non GDA (504)	Inside RPZ (697)	Outside RPZ (300)	Renting <1 yr (187)	Renting 1-4yrs (419)	Renting 5+yrs (391)
The tenant has breached their responsibilities	86%	89%	87%	85%	84%	88%	83%	86%	90%	83%
The landlord wants to sell the property	83%	83%	93%	82%	80%	82%	84%	81%	82%	85%
The landlord intends to undertake significant refurbishment of the property	74%	71%	86%	75%	73%	74%	74%	66%	74%	77%
The use of the property is changing	65%	60%	64%	67%	68%	63%	69%	61%	58%	73%
The landlord requires the property for personal or family use	64%	57%	71%	69%	69%	61%	72%	60%	60%	71%
The property is not suited to the tenants needs	62%	56%	51%	65%	68%	59%	67%	61%	57%	67%
If a tenancy has lasted less than 6 months	52%	50%	41%	54%	57%	49%	60%	51%	46%	59%

Q44b What are the reasons a landlord can terminate a tenancy?

Table A1.10: Q44c Perceived level of knowledge about rights and responsibilities (n=997)

	Total	Age				Social Class				Citizenship	
	(997)	19-24 (131)	25-34 (426)	35-44 (269)	45+ (171)	AB (117)	C1 (280)	C2 (272)	DE (327)	Irish Citizen (624)	Non-Irish Citizen (367)
Rent Increases											
No knowledge at all	24%	30%	26%	22%	17%	12%	27%	23%	27%	23%	25%
Some knowledge	59%	56%	57%	63%	60%	62%	58%	64%	55%	60%	58%
A lot of knowledge	17%	14%	17%	14%	23%	26%	15%	13%	19%	17%	16%
Rent Pressure Zones											
No knowledge at all	40%	48%	38%	42%	35%	22%	40%	34%	51%	39%	41%
Some knowledge	45%	38%	46%	45%	48%	51%	46%	49%	39%	45%	44%
A lot of knowledge	15%	14%	16%	13%	17%	26%	14%	18%	10%	16%	15%
Notice of termination or notice to quit											
No knowledge at all	21%	30%	20%	23%	13%	12%	19%	21%	25%	21%	20%
Some knowledge	62%	56%	63%	62%	65%	58%	66%	62%	60%	61%	64%
A lot of knowledge	17%	14%	18%	15%	22%	30%	14%	17%	15%	18%	16%
Tenant's responsibilities for the upkeep of the property											
No knowledge at all	17%	26%	16%	16%	11%	8%	19%	16%	18%	16%	17%
Some knowledge	65%	60%	65%	64%	67%	62%	65%	67%	63%	63%	66%
A lot of knowledge	19%	14%	19%	20%	21%	29%	16%	17%	20%	20%	17%
Rights of landlord to enter the property											
No knowledge at all	19%	26%	18%	20%	14%	12%	20%	18%	21%	19%	19%
Some knowledge	64%	62%	64%	65%	63%	65%	63%	67%	62%	62%	66%
A lot of knowledge	17%	12%	18%	15%	23%	23%	17%	15%	18%	19%	15%

	Total	Region				RPZ		Renting in Total		
	(997)	Dublin (390)	GDA (102)	Non-Dublin (606)	Non GDA (504)	Inside RPZ (697)	Outside RPZ (300)	Renting <1yr (187)	Renting 1-4yrs (419)	Renting 5+yrs (391)
Rent increases										
No knowledge at all	24%	19%	31%	27%	27%	24%	24%	29%	22%	24%
Some knowledge	59%	61%	57%	58%	58%	59%	58%	57%	61%	58%
A lot of knowledge	17%	20%	12%	15%	16%	17%	17%	14%	17%	18%
Rent pressure zones										
No knowledge at all	40%	26%	37%	49%	51%	34%	55%	49%	31%	45%
Some knowledge	45%	50%	50%	41%	40%	48%	37%	38%	50%	43%
A lot of knowledge	15%	24%	12%	10%	9%	18%	9%	13%	19%	12%
Notice of Termination or Notice to Quit										
No knowledge at all	21%	19%	20%	22%	23%	21%	21%	22%	18%	24%
Some knowledge	62%	60%	61%	63%	64%	60%	66%	60%	68%	56%
A lot of knowledge	17%	22%	20%	14%	13%	19%	13%	18%	14%	20%
Tenant's responsibilities for the upkeep of the property										
No knowledge at all	17%	17%	19%	16%	16%	18%	12%	18%	14%	18%
Some knowledge	65%	64%	61%	65%	65%	62%	70%	67%	69%	59%
A lot of knowledge	19%	19%	20%	19%	19%	19%	18%	16%	17%	22%
Rights of landlord to enter the property										
No knowledge at all	19%	18%	22%	19%	19%	20%	16%	20%	17%	20%
Some knowledge	64%	62%	62%	65%	66%	62%	68%	68%	65%	61%
A lot of knowledge	17%	20%	16%	16%	16%	18%	16%	12%	18%	19%

Q44c What is your level of knowledge on the following?

Table A1.11: Q80 Whether ever issued with a Notice of Termination by a landlord (n=997)

	Total	Age				Social Class				Citizenship	
	(997)	19-24 (131)	25-34 (426)	35-44 (269)	45+ (171)	AB (117)	C1 (280)	C2 (272)	DE (327)	Irish Citizen (624)	Non-Irish Citizen (367)
Yes	3%	*	3%	4%	4%	3%	1%	3%	5%	4%	3%
No	96%	98%	96%	95%	95%	97%	98%	97%	92%	96%	96%
Prefer not to say	1%	2%	1%	*	1%	0	1%	0	2%	1%	2%

	Total	Region				RPZ		Renting in Total		
	(997)	Dublin (390)	GDA (102)	Non-Dublin (606)	Non GDA (504)	Inside RPZ (697)	Outside RPZ (300)	Renting <1yr (187)	Renting 1-4yrs (419)	Renting 5+yrs (391)
Yes	3%	2%	6%	4%	4%	3%	4%	3%	3%	4%
No	96%	97%	94%	95%	95%	96%	95%	96%	96%	95%
Prefer not to say	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%

Q80 Has a landlord ever issued you with a Notice of Termination?

Table A1.12: Q45 Whether an inventory was carried out when first moved into current property (n=1,038)

	Total	Age				Social Class				Citizenship	
	(1038)	19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Yes	55%	45%	54%	58%	63%	62%	49%	58%	56%	56%	55%
No	28%	31%	28%	27%	27%	24%	31%	25%	29%	28%	27%
Don't know	17%	24%	18%	15%	10%	14%	19%	17%	15%	16%	18%

	Total	Region				RPZ		Renting in Total		
	(1038)	Dublin (407)	GDA (102)	Non- Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1 yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Yes	55%	58%	60%	54%	52%	54%	58%	52%	56%	56%
No	28%	23%	28%	31%	32%	28%	27%	28%	26%	30%
Don't know	17%	19%	12%	15%	16%	17%	15%	20%	17%	14%

Q45 Was an inventory carried out on the property you are currently renting when you first moved in?

Table A1.13: Q46 Are you familiar with a Building Energy Rating (BER) Certificate?

	Total	Age				Social Class				Citizenship	
	(1038)	19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Yes	46%	39%	47%	46%	52%	63%	46%	53%	35%	50%	40%
No	41%	45%	42%	38%	39%	24%	38%	38%	52%	38%	45%
Don't know	13%	16%	11%	17%	9%	13%	17%	8%	13%	12%	15%

	Total	Region				RPZ		Renting in Total		
	(1038)	Dublin (407)	GDA (102)	Non- Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1 yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Yes	46%	47%	55%	46%	44%	46%	47%	47%	50%	41%
No	41%	36%	39%	44%	45%	39%	44%	43%	36%	45%
Don't know	13%	17%	6%	10%	11%	15%	9%	10%	14%	14%

Q46 Are you familiar with a Building Energy Rating (BER) Certificate?

Table A1.14: Q47 Whether given a BER certificate for current property when first moved in (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Yes	31%	26%	31%	29%	37%	42%	31%	37%	21%	36%	22%
No	46%	48%	45%	51%	43%	42%	44%	45%	51%	43%	52%
Don't know	23%	26%	24%	21%	21%	16%	25%	18%	28%	21%	26%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non- Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1 yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Yes	31%	40%	41%	24%	21%	34%	23%	32%	36%	24%
No	46%	37%	40%	52%	55%	43%	54%	46%	42%	52%
Don't know	23%	22%	19%	23%	24%	23%	22%	22%	22%	24%

Q47 Were you given a BER certificate for the property you are currently renting when you first moved in?

Table A1.15: Q48 Whether Local Authority has carried out an inspection on current property since moving in (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Yes	14%	8%	13%	17%	20%	15%	8%	12%	22%	18%	8%
No	72%	71%	73%	73%	69%	68%	72%	81%	66%	69%	77%
Don't know (DNRO)	14%	21%	14%	11%	11%	16%	21%	7%	12%	13%	15%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non- Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Yes	14%	15%	11%	14%	15%	14%	17%	6%	13%	20%
No	72%	64%	87%	77%	75%	72%	72%	77%	72%	69%
Don't know	14%	22%	3%	8%	10%	15%	11%	17%	15%	11%

	Total (1038)	Rental Assistance		
		Any assistance (202)	HAP (112)	Rent Supplement (56)
Yes	14%	38%	47%	25%
No	72%	52%	42%	67%
Don't know	14%	10%	11%	8%

Q48 Since you've been a tenant in this property, has the Local Authority (e.g.Fingal Council, Cork County) carried out an inspection on the property?

Table A1.16: Q51 Whether landlord has carried out an inspection on current property since moving in (n=1,038)

	Total	Age				Social Class				Citizenship	
	(1038)	19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Yes	37%	31%	38%	38%	41%	43%	35%	37%	38%	38%	36%
No	55%	57%	55%	56%	54%	49%	55%	60%	55%	54%	57%
Don't know	7%	12%	7%	6%	5%	8%	10%	4%	7%	7%	7%

	Total	Region				RPZ		Renting in Total		
	(1038)	Dublin (407)	GDA (102)	Non-Dublin (631)	Non-GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1 yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Yes	37%	44%	27%	33%	34%	39%	35%	22%	39%	43%
No	55%	44%	72%	63%	61%	53%	60%	69%	54%	50%
Don't know	7%	12%	1%	4%	5%	8%	5%	9%	6%	7%

Q51 Since you've been a tenant in this property, has the landlord carried out an inspection on the property?

Table A1.17: Q52 Whether landlord gave notice before inspecting the property excluding tenants whose landlord did not carry out an inspection (n=388)

	Total	Age				Social Class				Citizenship	
	(388)	19-24 (42)*	25-34 (166)	35-44 (107)	45+ (73)	AB (54)	C1 (100)	C2 (101)	DE (133)	Irish Citizen (245)	Non-Irish Citizen (142)
Yes, but less than 24 hours' notice	5%	12%	4%	4%	4%	0	4%	7%	6%	6%	3%
Yes, more than 24 hours' notice	90%	83%	92%	89%	89%	95%	91%	87%	88%	88%	92%
No notice was given	3%	5%	2%	4%	4%	1%	3%	5%	4%	4%	3%
Don't know	2%	0	2%	2%	3%	4%	1%	1%	2%	2%	1%

	Total	Region				RPZ		Renting in Total		
	(388)	Dublin (180)	GDA (28)*	Non-Dublin (208)	Non-GDA (180)	Inside RPZ (282)	Outside RPZ (105)	Renting <1 yr (42)*	Renting 1-4yrs (168)	Renting 5+yrs (177)
Yes, but less than 24 hours' notice	5%	3%	10%	6%	6%	5%	5%	7%	6%	4%
Yes, more than 24 hours' notice	90%	94%	85%	87%	87%	90%	88%	91%	88%	91%
No notice was given	3%	2%	5%	5%	5%	3%	4%	2%	3%	4%
Don't know	2%	1%	0	2%	2%	2%	3%	0	3%	1%

Q52 Did the landlord give you notice before inspecting the property?

Table A1.18: Q53 Recency of last property inspection excluding tenants whose landlord did not carry out an inspection (n=388)

	Total (388)	Age				Social Class				Citizenship	
		19-24 (42)*	25-34 (166)	35-44 (107)	45+ (73)	AB (54)	C1 (100)	C2 (101)	DE (133)	Irish Citizen (245)	Non-Irish Citizen (142)
Within the last 6 months	29%	48%	29%	30%	19%	37%	34%	24%	27%	26%	34%
Between 6-12 months ago	36%	25%	38%	39%	31%	38%	43%	31%	33%	35%	38%
Between 1-2 years ago	22%	16%	22%	21%	29%	21%	16%	26%	26%	23%	21%
Between 2-3 years ago	5%	4%	5%	6%	2%	2%	*	10%	5%	5%	4%
Between 3-4 years ago	3%	3%	2%	2%	7%	2%	3%	4%	3%	4%	1%
Between 4-5 years ago	1%	0	1%	0	4%	0	0	1%	2%	1%	1%
More than 5 years ago	2%	0	1%	2%	7%	0	1%	3%	3%	3%	1%
Don't know	1%	4%	1%	1%	1%	1%	3%	1%	1%	2%	1%
Within the last 12 months	65%	73%	67%	69%	50%	74%	77%	55%	60%	61%	72%

	Total (388)	Region				RPZ		Renting in Total		
		Dublin (180)	GDA (28)*	Non-Dublin (208)	Non GDA (180)	Inside RPZ (282)	Outside RPZ (105)	Renting <1 yr (42)*	Renting 1-4yrs (168)	Renting 5+yrs (177)
Within the last 6 months	29%	33%	15%	26%	28%	33%	20%	56%	34%	19%
Between 6-12 months ago	36%	40%	38%	32%	31%	37%	33%	42%	41%	29%
Between 1-2 years ago	22%	17%	12%	28%	30%	17%	36%	0	19%	32%
Between 2-3 years ago	5%	3%	11%	6%	5%	5%	5%	0	2%	8%
Between 3-4 years ago	3%	3%	3%	3%	3%	3%	3%	0	1%	6%
Between 4-5 years ago	1%	1%	6%	2%	1%	1%	0	0	0	2%
More than 5 years ago	2%	2%	12%	2%	1%	3%	1%	0	2%	3%
Don't know	1%	1%	3%	2%	2%	1%	2%	2%	2%	1%
Within the last 12 months	65%	73%	53%	59%	60%	70%	53%	98%	75%	48%

Q53 When was this inspection last carried out?

Table A1.19: Q55 Maintenance requests excluding tenants that have never made a maintenance request since living in current property (n=492)

	Total (492)	Age				Social Class				Citizenship	
		19-24 (43)*	25-34 (206)	35-44 (149)	45+ (95)	AB (67)	C1 (136)	C2 (115)	DE (175)	Irish Citizen (305)	Non-Irish Citizen (185)
Broken large appliance (washer, oven etc.)	41%	39%	41%	42%	38%	34%	32%	36%	53%	42%	39%
Plumbing	36%	38%	36%	34%	36%	26%	42%	36%	34%	38%	32%
Broken small appliance (microwave etc.)	30%	36%	27%	32%	29%	49%	35%	26%	20%	29%	31%
Broken or damaged electrical outlet	14%	8%	15%	13%	13%	27%	10%	13%	11%	12%	15%
Damp or mould	12%	12%	12%	9%	14%	13%	11%	7%	15%	14%	8%
External or Internal painting	8%	13%	8%	7%	7%	6%	6%	7%	10%	7%	8%
Replacement furniture	8%	8%	6%	7%	11%	14%	7%	2%	10%	7%	8%
Replacement kitchen furniture	7%	5%	6%	8%	8%	14%	9%	2%	5%	7%	5%
Other (please specify)	5%	4%	4%	8%	6%	4%	2%	6%	8%	7%	4%

	Total (492)	Region				RPZ		Renting in Total		
		Dublin (172)	GDA (51)	Non-Dublin (321)	Non-GDA (270)	Inside RPZ (340)	Outside RPZ (152)	Renting <1 yr (49)	Renting 1-4yrs (214)	Renting 5+yrs (230)
Broken large appliance (washer, oven etc.)	41%	30%	31%	47%	49%	37%	48%	33%	38%	44%
Plumbing	36%	27%	48%	40%	39%	36%	34%	39%	37%	34%
Broken small appliance (microwave etc.)	30%	49%	22%	19%	19%	34%	19%	32%	34%	25%
Broken or damaged electrical outlet	14%	16%	7%	12%	13%	13%	15%	19%	14%	12%
Damp or mould	12%	13%	15%	11%	10%	13%	10%	12%	9%	14%
External or Internal painting	8%	8%	5%	8%	8%	7%	9%	4%	5%	11%
Replacement furniture	8%	11%	2%	6%	7%	8%	8%	2%	10%	7%
Replacement kitchen furniture	7%	12%	2%	4%	4%	9%	2%	7%	5%	8%
Other (please specify)	5%	5%	12%	5%	4%	7%	3%	7%	2%	9%

Q55 What was the request related to?

Table A1.20: Q58a Whether ever undertaken any maintenance work in current property that should have been brought to the landlord's or letting agent's attention (n=1,038)

	Total	Age				Social Class				Citizenship	
	(1038)	19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Yes	26%	14%	24%	30%	34%	38%	17%	26%	29%	28%	23%
No	74%	86%	76%	70%	66%	62%	83%	74%	71%	72%	77%

	Total	Region				RPZ		Renting in Total		
	(1038)	Dublin (407)	GDA (102)	Non- Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Yes	26%	24%	27%	27%	27%	25%	28%	11%	23%	36%
No	74%	76%	73%	73%	73%	75%	72%	89%	77%	64%

Q58a Have you ever under taken any maintenance work in your current property yourself, that you should have brought to the landlord's or letting agent's attention?

Table A1.21: Q61 Whether property has any issues (n=1,038)

	Total	Age				Social Class				Citizenship	
	(1038)	19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Damp or mould	11%	14%	11%	11%	11%	9%	10%	10%	15%	12%	11%
Lack of ventilation in rooms	4%	5%	4%	4%	4%	3%	4%	4%	5%	5%	3%
Issues with electrical wiring or switches or sockets	3%	1%	3%	3%	3%	2%	2%	3%	3%	3%	2%
Lack of hot water	2%	0	2%	3%	3%	2%	1%	1%	4%	2%	2%
Presence of pests or vermin	2%	1%	2%	3%	3%	1%	2%	2%	3%	3%	2%
Lack of cold water	1%	0	1%	1%	2%	0	1%	1%	1%	1%	1%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1 yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Damp or mould	11%	7%	10%	14%	15%	10%	15%	13%	10%	12%
Lack of ventilation in rooms	4%	3%	5%	5%	5%	4%	5%	4%	4%	5%
Issues with electrical wiring or switches or sockets	3%	*	3%	4%	5%	2%	4%	4%	2%	3%
Lack of hot water	2%	1%	3%	3%	3%	2%	3%	2%	2%	2%
Presence of pests or vermin	2%	1%	2%	4%	4%	2%	4%	4%	2%	2%
Lack of cold water	1%	*	2%	1%	1%	1%	2%	1%	*	2%

Q61 Please answer yes or no if your property has any of the following issues -

Table A1.22: Q30 Services included in monthly rent payments (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Bins or waste collection	31%	41%	33%	25%	27%	43%	46%	26%	17%	30%	31%
Parking	25%	24%	26%	25%	24%	39%	35%	19%	17%	27%	22%
Internet subscription	15%	22%	16%	12%	13%	20%	23%	13%	8%	13%	17%
Electricity costs	15%	20%	16%	11%	12%	20%	23%	13%	8%	13%	17%
Television subscription	12%	21%	11%	9%	10%	14%	17%	12%	7%	12%	11%
Gas costs	10%	14%	11%	7%	10%	10%	14%	12%	5%	8%	13%
Oil costs	2%	1%	2%	2%	2%	3%	3%	1%	1%	2%	2%
None of these	55%	45%	53%	59%	61%	39%	34%	62%	73%	56%	54%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non-GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1 yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Bins or waste collection	31%	46%	29%	21%	20%	35%	22%	44%	37%	18%
Parking	25%	26%	16%	25%	26%	28%	18%	28%	32%	17%
Internet subscription	15%	23%	33%	10%	6%	19%	5%	21%	21%	6%
Electricity costs	15%	25%	33%	8%	4%	19%	4%	21%	20%	7%
Television subscription	12%	13%	32%	11%	7%	14%	6%	13%	18%	5%
Gas costs	10%	16%	30%	6%	1%	14%	1%	12%	14%	5%
Oil costs	2%	4%	0	1%	1%	2%	1%	2%	2%	2%
None of these	55%	45%	50%	62%	64%	48%	73%	43%	44%	72%

Q30 Are any of the following services included in your monthly rent payments?

Table A1.23: Q60 Whether property has access to (n=1,038)

	Total (1038)	Age				Social Class				Citizenship	
		19-24 (137)	25-34 (443)	35-44 (281)	45+ (176)	AB (125)	C1 (289)	C2 (276)	DE (348)	Irish Citizen (640)	Non-Irish Citizen (393)
Oven	97%	96%	97%	98%	96%	99%	100%	95%	95%	96%	98%
Fridge	97%	97%	98%	97%	97%	98%	99%	96%	97%	97%	98%
Microwave	96%	97%	95%	97%	94%	98%	97%	95%	94%	94%	97%
Working Fire Alarms	95%	95%	95%	94%	95%	97%	96%	94%	93%	94%	95%
Freezer	93%	89%	93%	94%	93%	94%	95%	92%	91%	91%	95%
Access to refuse bins	92%	94%	92%	91%	93%	94%	94%	91%	91%	92%	92%
4 ring Hob	89%	85%	89%	91%	88%	90%	84%	91%	91%	90%	87%
Grill	89%	89%	89%	89%	89%	84%	84%	92%	92%	90%	87%
Own washer or dryer	88%	84%	87%	91%	89%	94%	88%	85%	89%	86%	92%
Parking	87%	81%	88%	88%	90%	87%	87%	89%	86%	89%	85%
Fixed heater in bathrooms	84%	85%	84%	84%	84%	90%	88%	82%	81%	84%	85%
Carbon monoxide detector	81%	75%	80%	81%	85%	86%	78%	86%	77%	82%	79%
Private outdoor space	80%	79%	78%	79%	85%	76%	77%	82%	81%	80%	78%
Fire blanket	68%	63%	69%	69%	68%	78%	70%	61%	69%	68%	68%
Communal outdoor space	59%	64%	58%	59%	58%	54%	55%	59%	63%	62%	54%
Communal washer or dryer	45%	48%	46%	42%	45%	52%	51%	43%	39%	46%	43%

	Total (1038)	Region				RPZ		Renting in Total		
		Dublin (407)	GDA (102)	Non-Dublin (631)	Non GDA (529)	Inside RPZ (732)	Outside RPZ (305)	Renting <1 yr (197)	Renting 1-4yrs (427)	Renting 5+yrs (414)
Oven	97%	96%	98%	98%	98%	97%	97%	98%	97%	96%
Fridge	97%	95%	99%	99%	98%	97%	98%	99%	98%	96%
Microwave	96%	96%	98%	95%	95%	96%	94%	96%	96%	95%
Working Fire Alarms	95%	93%	98%	96%	95%	95%	94%	96%	94%	95%
Freezer	93%	91%	98%	94%	94%	93%	92%	90%	94%	93%
Access to refuse bins	92%	90%	98%	93%	92%	91%	95%	93%	94%	90%
4 ring Hob	89%	80%	94%	95%	95%	87%	94%	88%	83%	95%
Grill	89%	80%	97%	95%	94%	87%	93%	85%	85%	95%
Own washer or dryer	88%	87%	97%	89%	87%	89%	85%	85%	91%	87%
Parking	87%	79%	96%	93%	92%	85%	94%	81%	90%	87%
Fixed heater in bathrooms	84%	83%	96%	85%	83%	87%	77%	83%	88%	81%
Carbon monoxide detector	81%	80%	93%	81%	78%	81%	79%	75%	81%	83%
Private outdoor space	80%	73%	91%	84%	82%	78%	84%	77%	79%	81%
Fire blanket	68%	67%	63%	69%	70%	67%	70%	68%	66%	71%
Communal outdoor space	59%	49%	40%	65%	70%	56%	66%	58%	53%	66%
Communal washer or dryer	45%	53%	32%	41%	42%	51%	32%	46%	47%	43%

Q60 Please answer yes or no if your property has any of the following -

Appendix 2

Sampling Procedure

The sampling point selection process used the Pobal HP Deprivation Index.

The following table details the stages taken in the selection of sampling points and starting addresses:

Table A2.1: **Sampling point selection process**

Stage	Details
1	Acquire deprivation index data for 4 regions and 4 Dublin Local Authorities (https://maps.pobal.ie/WebApps/GeoprofilingReports/index.html)
2	Classify each 'Electoral Division' within each region with Deprivation Score Class ranging from -4 to 4 based on original range (-31.9 to 22.5).
3	Download CSO database of number of persons living in private rental sector
4	Calculate number of sampling points in each region and Local Authority based on the proportional breakdown of PRS dwellers and Deprivation Score distribution
5	Select sampling points ('Electoral Divisions') with the highest number of persons accommodated in PRS that meet the criteria of deprivation score (class) by local authority
6	Select starting address using CSO SapMap by displaying each 'Small Area' and using Eircode finder website

Selecting Sampling Points

A three-stage sample selection procedure was used. The stages in the sample selection were:

- ▶ **Stage 1:** Selection of a fixed number of sampling points
- ▶ **Stage 2:** Selection of addresses within clusters
- ▶ **Stage 3:** Selection of the individual for interview

Stage 1: Selection of sampling points

The population of sampling points was created by categorizing and sorting Electoral Divisions to a set of spatial units to achieve a representative sample. Sampling units were selected proportionate to the number of those living in the private rental sector. The PSUs were stratified using two indicators of socio-demographic and socio-economic composition: the Pobal HP Small Area Deprivation Index and the CSO's area typology (e.g. four Dublin local authorities)

Stage 2: Selection of starting address within sampling points

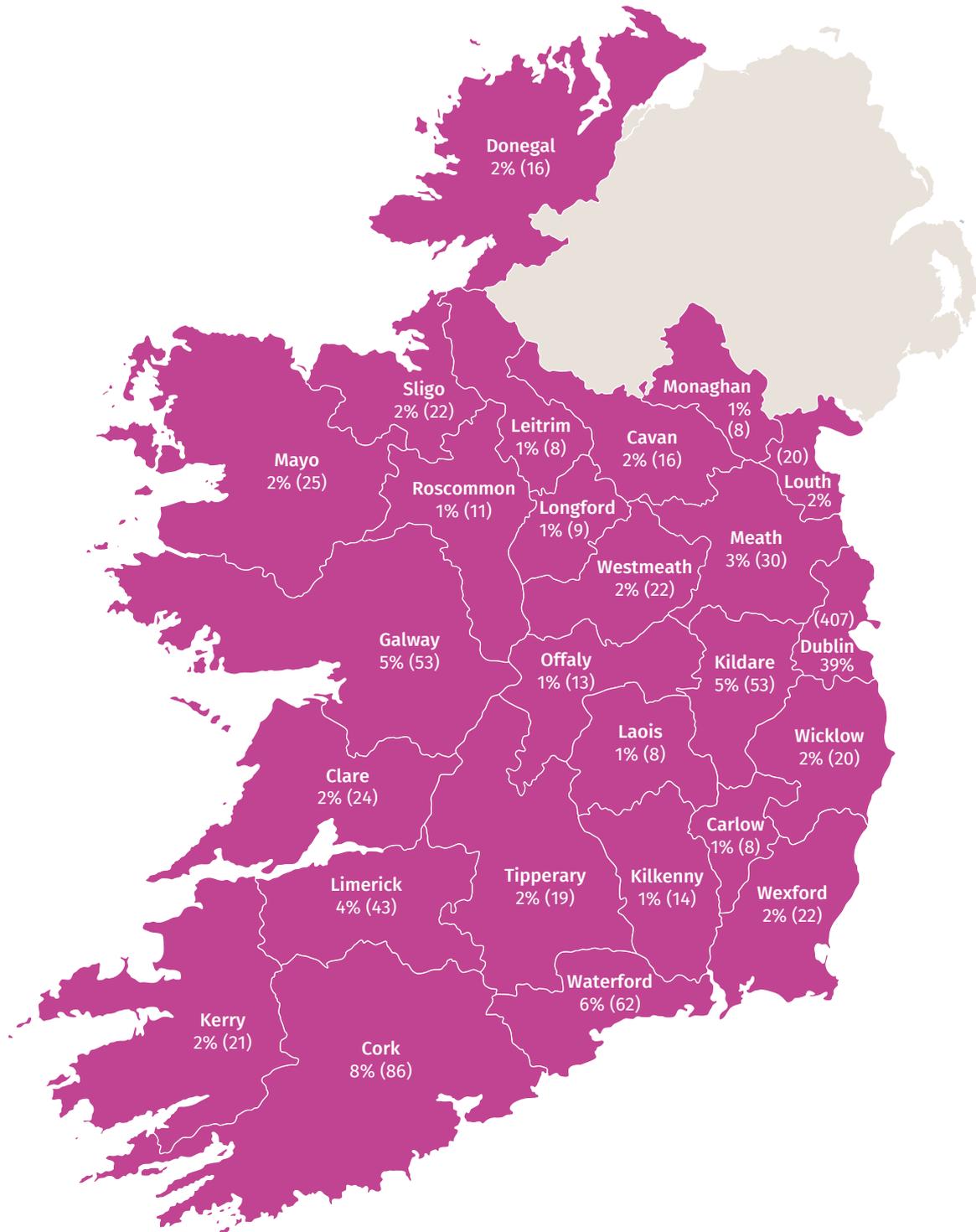
Interviewers were given a starting address within their sampling point. An equal number of interviews within each cluster was achieved. The addresses were selected using the Eircode finder. Interviewers were given Electoral District maps to ensure they interview in the assigned sampling point only.

Stage 3: Selection of the individual for interview

When contacting the household, the interviewer sought an adult resident aged 19 years or older with whom to complete the screening question. In order to qualify, interviewees had to be paying the rental costs associated with the property – either solely or jointly. Prior to the interview taking place, informed consent was sought from the person taking the interview. Once this individual was identified and had provided consent, the interviewer conducted the interview.

Appendix 3

Weighted Sample Profile by County





Bord um Thionóntachtaí Cónaithe
Residential Tenancies Board

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