



Bord um Thionóntachtaí Cónaithe
Residential Tenancies Board

Tenants Research Report

December 2023



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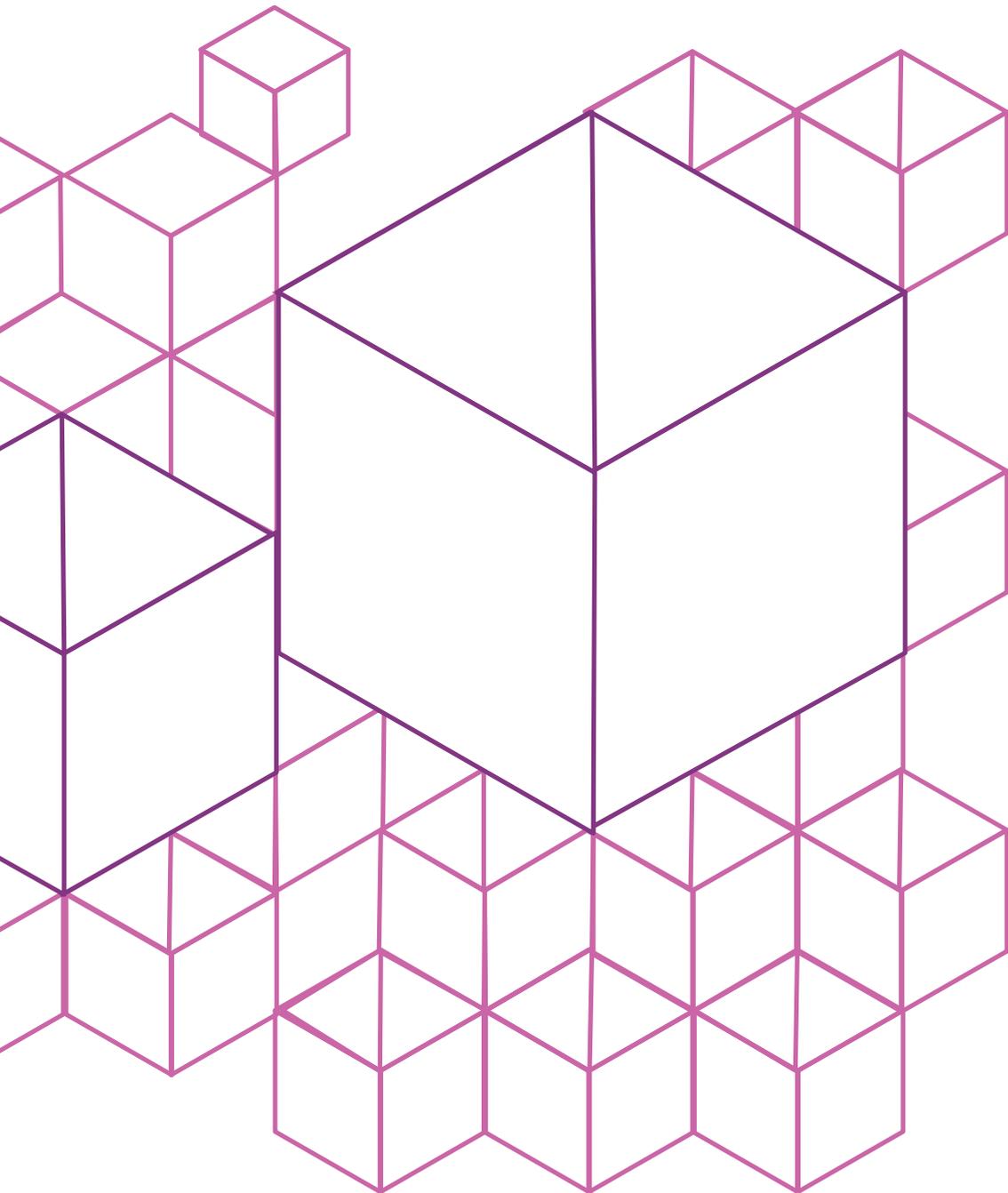
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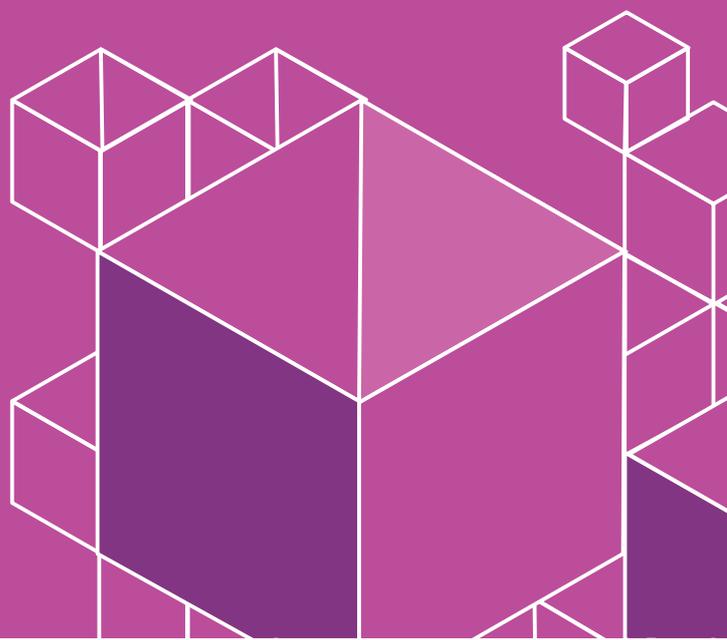
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Executive Summary



Background

The Tenant, Landlord and Letting Agent research study was commissioned by the Residential Tenancies Board (RTB) and is one of the largest studies of the rental sector ever conducted in Ireland. The purpose of the study is to provide up-to-date and robust information on the landlords, tenants and letting agents in the rental sector. In particular, the research seeks to create an accurate profile of landlords, tenants and letting agents. It also looks to examine their experiences and attitudes and to establish their future intentions with regard to the private rental sector in Ireland.

The first phase of the project was conducted in 2019/20. The second phase of the project began in April 2022 and was completed in July 2023. The 2022/23 research followed the same methodology as that of 2019/20.

The tenant research focussed on tenants living in accommodation that is privately rented in Ireland.

This report presents findings from the 2022/23 tenant research. Where relevant the results of the 2019/20 research are also shown thus allowing for comparison and the identification of sectoral trends.

Approach

The 2022/23 tenant research included a nationally representative face-to-face survey of 1200 tenants living in accommodation that is privately rented in Ireland. The fieldwork took place from October 2022 to February 2023. The quantitative element was strengthened by qualitative research. The qualitative element consisted of four thematic focus groups which were undertaken by Zoom video-conferencing service in July 2023.

Key Findings

Profile of tenants and rental property

Most of the tenants that were surveyed had a history of renting in the private rental sector. In 2022/23, tenants were renting for an average of 5.03 years, more or less on par with 2019/20 (average of 5.01 years).

In 2022/23, the majority (59%) of tenants stated that they were living in another rental property before moving into their current property (on par with 2019/20 at 58%). One in five (19%) were 'living in the family home with my parents' and 17% were 'living abroad' (the results for 2019/20 were similar).

Similarly in the qualitative research, most of the group participants had lived in multiple properties, with one or two exceptions.

Non-Irish citizens accounted for a significant proportion of all tenants surveyed. In 2022/23, non-Irish citizens represented 40% of all tenants surveyed compared to 38% in 2019/20.

In 2022/23, nearly half (47%) of non-Irish citizens were EU citizens and a slightly higher proportion (49%) were 'rest of the world' citizens. In 2019/20, the proportion of EU citizens was slightly higher (52%) and the proportion of 'rest of the world' citizens was lower (43%).

In 2022/23 and within Dublin, the proportion of tenants renting a house (48%) was similar to the proportion renting an apartment (50%), whereas outside Dublin nearly two-thirds of private renters were renting a house (73%) and 26% were renting an apartment. There was a similar finding in the previous research.

Most tenants continue to share their rented property with others. 'Living with my spouse or partner with children' was the biggest single category overall (33% in 2022/23 and 34% in 2019/20), followed by 'living with others (sharing)' – 29% in 2022/23 up from 24% in 2019/20. Approximately one in eight tenants were living alone (11% in 2022/23 and 12% in 2019/20). Nearly one fifth were 'living with my spouse or partner without children' (18% in 2022/23 and 19% in 2019/20) and the remainder were 'living with my children and no spouse or partner' (5% in 2022/23), 'living with children and no spouse or partner and adult dependents' (2% in 2022/23) or 'living with spouse or partner with/without children and adult dependents' (2% in 2022/23).

The average number of occupants living in a rented property was 3.14 in 2022/23 and 3.04 in 2019/20.

Deposits and rent

Although the majority of tenants still pay rent directly to the landlord, the proportion that pay rent to a letting agent has increased. In 2022/23 two-thirds of tenants (66%) who were paying rent were paying 'directly to a landlord'. However, the figure for 2019/20 was higher (83%). The proportion that paid rent 'to a letting agent' increased from 12% in 2019/20 to 28% in 2022/23.

The proportion of tenants who were required to provide the landlord with documentation prior to renting the property increased significantly. In 2022/23 a total of 72% were required to provide some form of documentation (e.g. previous landlord reference, employer reference, statement of income, bank statement etc) compared to 59% in 2019/20. Approximately one in four (28%) tenants stated that they were not required to provide the landlord with any documentation (down from 41% in 2019/20).

Both waves of research indicated that a higher proportion of tenants renting an apartment versus those renting a house were required to provide documentation prior to renting. The increase in the apartment quota in 2022/23 has no doubt contributed to the higher proportion of tenants overall who were required to provide documentation. However, even amongst those who were renting a house, the results point towards an increase in the proportion required to provide documentation.

Most tenants paid a deposit when first renting their current property. The proportion that paid a deposit increased from 87% in 2019/20 to 92% in 2022/23.

Amongst those tenants who paid a deposit, most paid one month's rent as the deposit. However, the proportion paying one month's rent as a deposit decreased slightly from 88% in 2019/20 to 82% in 2022/23. This indicates that a slightly higher proportion paid either more or less than one month's rent as a deposit in 2022/23.

At a national level, the median deposit paid was the same in 2019/20 and 2022/23 (€1,000). Renters in Dublin paid a higher median deposit in 2022/23 (€1,650) when compared to 2019/20 (€1,450). However, the median deposit paid by renters outside Dublin was the same in both surveys (€800).

At a national level, the total rent paid per month on the property was higher in 2022/23 when compared to 2019/20. Tenants paid a median rent of €1,300 per month on the property in 2022/23 compared to €1,000 in 2019/20.

At a national level, the individual rent paid per month on the property was also higher in 2022/23 when compared to 2019/20. The median individual rent paid per month at a national level was €1,000 in 2022/23 compared to €850 in 2019/20.

The most recent survey results indicate that the median spend on rent (excluding bills, service charges etc) was 30% of monthly net income (after tax). This is in line with the results from the 2019/20 RTB survey.

The vast majority 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. The result in 2022/23 was 93%, almost on par with 2019/20 (94%).

Feedback from the in-depth interviews with medium and large landlords also indicated that the proportion of tenants currently in rent arrears was not significant.

The 2022/23 survey results indicate that a higher proportion of tenants have had a rent increase within the last 12 months when compared to 2019/20.

Nearly one third (31%) of tenants indicated that their current rent was higher than when they first moved in (vs 25% in 2019/20). The majority of these tenants had their most recent rent increase within the last 12 months of being surveyed (60% up from 54% in 2019/20).

It is interesting to note that in 2022/23 a total of 69% of tenants surveyed stated that their rent has not increased since they moved in. Amongst those renting for five years or longer, 50% stated that their rent has not increased since they moved in.

Rent Pressure Zones

Awareness of RPZs was higher overall in 2022/23 when compared to 2019/20. In 2022/23, a total of 44% stated that they know what an RPZ is. The figure for 2019/20 was 37%. However, in both surveys the majority of tenants were not aware what an RPZ is (56% in 2022/23 and 63% in 2019/20).

Rental Assistance

In 2022/23, approximately one in five tenants (18%) stated that were in receipt of some form of rental assistance. This was almost par with 2019/20 (19%).

Amongst tenants in receipt of rental assistance, the proportion receiving the Housing Assistance Payment (HAP) increased from 58% in 2019/20 to 83% in 2022/23.

A top-up payment was made to the landlord by 88% of all tenants in receipt of rental assistance. The proportion making a top-up payment was significantly lower in 2019/20 (66%). In addition, the average amount paid as a top-up increased from €255.88 in 2019/20 to €284.38 in 2022/23.

Motivations for renting and future intentions

Reasons for renting were varied – the key drivers were tenants' inability to get a mortgage, closely followed by personal reasons and employment reasons.

Whereas convenience was the main reason given for renting by tenants in 2019/20 (with 24% saying 'it's convenient to things I need to be close to (e.g. work, college, schools)'), the main reasons given in 2022/23 were 'can't get a mortgage' (30% vs 20% in 2019/20) closely followed by 'personal reasons' (29% vs 19% in 2019/20) and 'employment reasons' (28% vs 12% in 2019/20). Flexibility was also a key factor in 2022/23 with 26% saying 'renting suits my current situation' (vs 21% in 2019/20) and 11% saying that 'renting allows me flexibility about where I live' (vs 7% in 2019/20).

In terms of future intentions, although the greatest proportion of tenants in 2022/23 saw themselves still renting privately in 12 months' and five years' time, nearly half thought they would become an owner occupier (house/apartment) in the longer term (10 years' time), more or less on par with 2019/20.

In 2022/23, a total of 81% of tenants surveyed saw themselves still renting (house/apartment) in 12 months' time. A small minority (9%) 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 to 34% and the proportion who saw themselves still renting was 44%. Approximately one in twenty (6%) saw themselves renting from the Local Authority or AHB during this period. However, a significant proportion (17%) mentioned 'other' and these 'other' responses included 'don't know', 'will consider emigrating' and 'will consider returning to the family home'.

In the longer term (10 years' time), 16% saw themselves renting privately in either a house or an apartment, down from 25% in 2019/20. Nearly half (49%) of all tenants thought they would become an owner occupier (house/apartment) during this period (more or less on par with 2019/20). The proportion who saw themselves renting from the Local Authority or AHB was 9% (11% in 2019/20). However, the proportion who mentioned 'other' (don't know, will consider emigrating or returning to family home) increased from 14% in 2019/20 to 26% in 2022/23.

Awareness of rights and responsibilities

In 2022/23, the proportion of tenants who stated that they have a written tenancy agreement was 88%, showing an increase of 6% since 2019/20 (82%).

Awareness of frequency of rent reviews increased slightly but there is still room for improvement. In 2022/23, nearly half (44%) believed that their landlord could review their rent 'every 12 months' (up from 30% in 2019/20). A further 20% believed that their landlord could review their rent 'every 24 months' (23% in 2019/20). The proportion who believed that their landlord could review their rent 'as often as they wish' declined from 12% to 4% and 32% stated that they do not know how often their landlord can review their rent (vs 35% in 2019/20).

In both surveys, most tenants appeared to have at least 'some knowledge' on a range of issues to do with the rights and responsibilities of landlords and tenants. Tenants were most knowledgeable in 2022/23 about 'tenant's responsibilities for the upkeep of the property' (86% had 'a lot of/some knowledge' vs 83% in 2019/20) and least knowledgeable about RPZs (60% had 'a lot of/some knowledge' vs 60% in 2019/20).

Awareness of the RTB and its functions

Overall awareness of the RTB was significantly higher in 2022/23. It increased from 47% in 2019/20 to 76% in 2022/23.

Awareness of the RTB was consistently higher across all age groups in 2022/23, lowest amongst tenants aged 19-24 (60%).

However, amongst tenants aware of the RTB, prompted awareness of the body's individual functions was somewhat lower than the previous survey. The level of engagement with the RTB on a variety of aspects was also lower overall in 2022/23 than that recorded in the previous survey.

Similarly, in the qualitative research most group participants were aware of the RTB, having come across it through the registration of their tenancies.

Property inspections and maintenance requests

Two-thirds (66%) of tenants in the 2022/23 survey stated that an inventory was carried out on their current property when they first moved in. The result for 2019/20 was somewhat lower (55%).

Familiarity with a Building Energy Rating (BER) certificate increased from 46% in 2019/20 to 58% in 2022/23. The proportion who stated that were given a BER certificate when they first moved into their current property also increased from 31% in 2019/20 to 39% in 2022/23.

Although the proportion of tenants who received a Local Authority inspection was similar in both surveys (14% in 2019/20 and 16% in 2022/23), a higher proportion of these inspections took place within the last six or 12 months in the 2022/23 survey (60% vs 41% in 2019/20).

The incidence of landlord inspections was more than double that of Local Authority inspections in both surveys. In 2022/23, nearly half (45%) of all tenants stated that the landlord had carried out an inspection on their current property. The figure for 2019/20 was somewhat lower (37%). In 2022/23, the majority (75%) of these inspections were carried out within the last 12 months (up from 65% in 2019/20).

Nearly half of all tenants had made a maintenance request while living in their current property. In 2022/23, maintenance requests were made by 44% of all tenants while living in their current property. The figure for 2019/20 was similar (47%).

One in four 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 (24% in 2022/23 vs 26% in 2019/20). The proportion of tenants who mentioned 'did not want to bother the landlord' as a reason increased from 28% in 2019/20 to 45% in 2022/23.

A similar finding emerged in the qualitative research – some tenants admitted that they did not want to bother the landlord with maintenance requests for fear that they would increase the rent.

Property facilities/services

In 2022/23, 'parking' was the service most likely to be included in monthly rent payments, followed by 'bins or waste collection'. However, half of all tenants (50%) stated that there were no services included in their monthly rent payments (vs 55% in 2019/20).

Not surprisingly, the proportion of tenants with at least one service included in their monthly rent payments was higher amongst tenants renting an apartment (68% in 2022/23) compared to tenants renting a house (40% in 2022/23).

Rating of rental experience

Overall, the results of both surveys indicate that tenants' experience of renting and living in the private rental sector was positive.

In 2022/23, a total of 83% were 'positive/very positive' about renting their current property (79% in 2019/20), 14% were 'neutral' and 3% were 'negative/very negative' (on par with 2019/20).

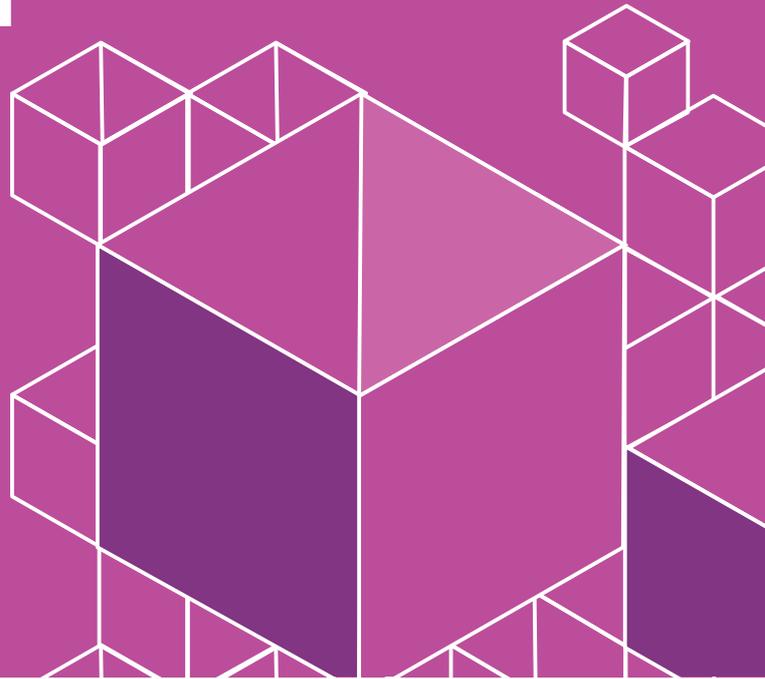
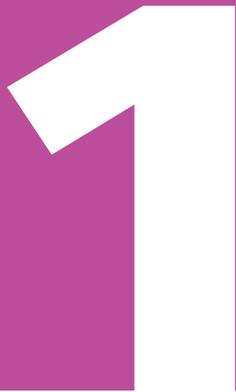
The results were similar when tenants were asked about their experience of renting in this neighbourhood. A total of 84% were 'positive/very positive' (83% in 2019/20), 14% were 'neutral' and 2% were 'negative/very negative' (on par with 2019/20).

Similar results were seen in the qualitative research, most group participants were happy enough with where they are renting – they like the area and the amenities.

However, as was the case in 2019/20, tenants were slightly less positive about their experience of living in the private rental sector in general. In 2022/23, a total of 67% were 'positive/very positive' (down from 72% in 2019/20), 22% were 'neutral' and 11% were 'negative/very negative' (up from 8% in 2019/20).

Whereas in 2019/20 the experience of tenants renting inside Dublin was more or less on par with that of tenants renting outside Dublin, in 2022/23 the experience of tenants renting inside Dublin appeared to be less positive, not only with their current property and neighbourhood but with renting in the private rental sector in general.

Introduction



1.1 Introduction

The Tenant, Landlord and Letting Agent 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.

The first phase of the project was conducted in 2019/20. The second phase of the project began in April 2022 and was completed in July 2023. The 2022/23 research followed the same methodology as that of 2019/20 to allow for robust comparability of results.

1.2 Research Objectives

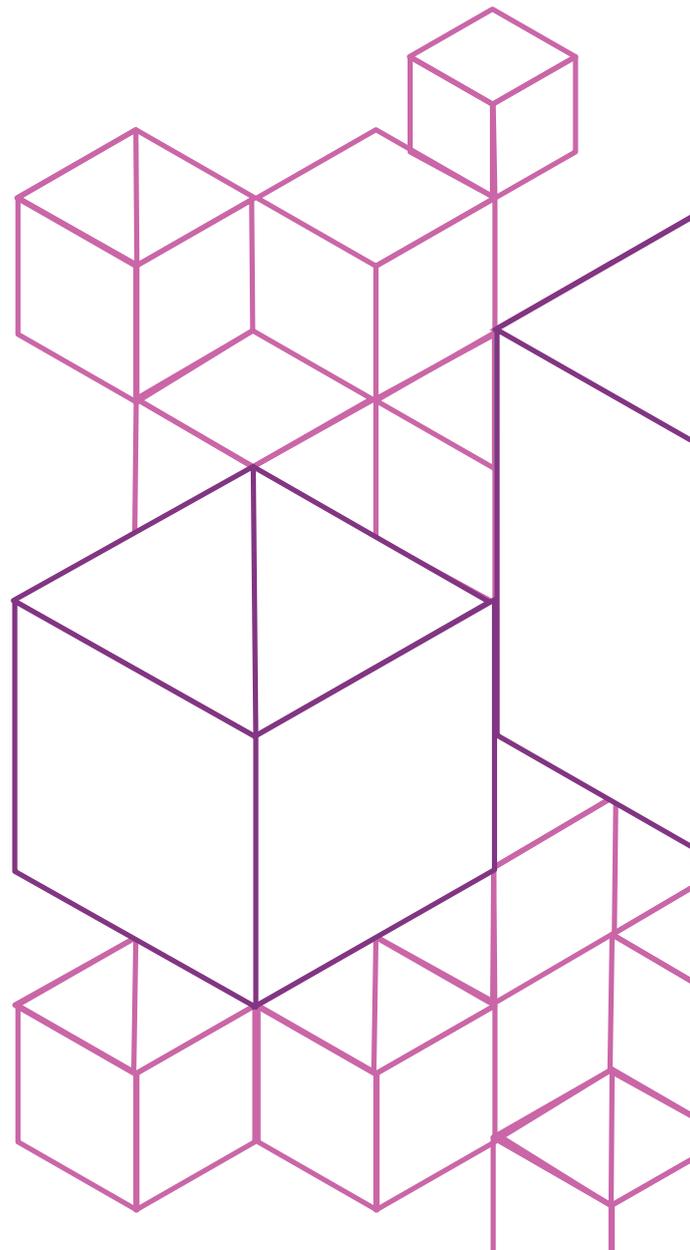
The research objectives for the project were as follows:

- ▶ 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

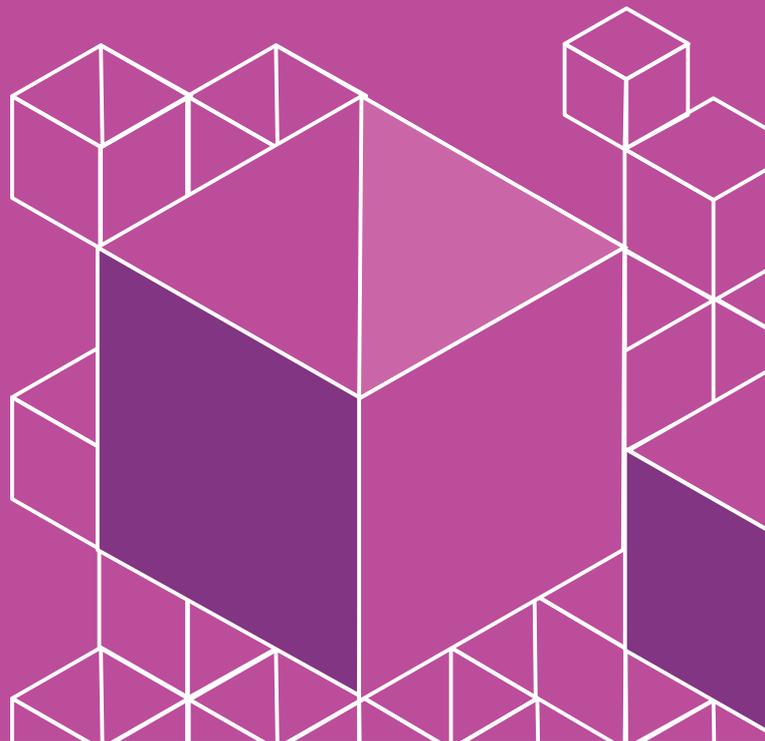
Section 1 of this report provides an introduction to the study and outlines the research objectives. Section 2 details the methodology used for the quantitative survey of tenants. It also outlines the sampling approach used, the sample that was achieved and the approach used to develop the survey instrument. Section 3 presents the results of the nationally representative face-to-face survey of tenants including a summary of key findings, a summary of the experience of non-Irish citizens and a summary of the experience of older renters aged 45+.

Where relevant the results of the 2019/20 research are shown alongside those of 2022/23 to allow for comparability and the identification of sectoral trends.



Private Tenants Research

2



2.1 Research Methodology

The private tenant research 2022/23 employed a mixed mode methodology, using quantitative and qualitative 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 October 2022 to February 2023.

The quantitative research was strengthened by qualitative research. This comprised of four thematic focus groups which were undertaken by Zoom video-conferencing service in July 2023.

The same mixed mode methodology was employed to conduct the 2019/20 research of private tenants.

2.2 Sampling Approach

For both waves of quantitative research, the sampling approach taken was a non-probability quota-based methodology, similar to that used for 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 national (Dublin, Munster, Rest of Leinster and Connacht/Ulster) distribution of private tenancies². Within Dublin, sampling points were spread to represent the four local authorities – Dublin City, Dún 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 (July 2019/2020)

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).

2.3 Sample Achieved

Fieldwork for the 2022/23 tenant survey was carried out over a 16-week period between 14th October 2022 and 9th February 2023. The research achieved a total sample of 1200 face-to-face surveys across 150 sampling points. The margin of error was 2.83% at a 95% confidence interval.

The 2019/20 research achieved a total sample of 1,038⁴ face-to-face surveys across 130 sampling points. The margin of error was 2.94% at a 95% confidence interval as indicated in Table 2.1.

Table 2.1: Overview of sample

Survey	Sample Size	Sampling Points	Completed Surveys Per Sampling Point	Margin of error
2022/23	1,200	150	8	2.83%
2019/20	1,038	130	8	2.94%

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 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

	2019/20 (N=1038)	2022/23 (N=1200)
Age		
Young adults 19-24 years	13%	13%
Persons aged 25-34 years	43%	43%
Persons aged 35-44 years	27%	27%
Persons aged 45-54 years	10%	10%
Persons aged 55-64	6%	6%
Persons aged 65+	1%	1%
Gender		
Male	50%	50%
Female	50%	50%
Region		
Dublin	39%	39%
Leinster (excluding Dublin)	21%	21%
Munster	25%	25%
Connacht and Ulster	15%	15%
Local Authority Area (Dublin only)		
Dublin City	23%	23%
Dún Laoghaire-Rathdown	5%	5%
Fingal	6%	6%
South Dublin	5%	5%

In 2019/20, a minimum quota was introduced on apartments before fieldwork began and 26% of surveys were achieved amongst private renters in apartments (purpose-built developments or apartments/flats within a converted house). In 2022/23, the minimum quota on apartments was increased to 35% to bring it more in line with current CSO estimates, thus ensuring that tenants renting privately in apartments were adequately represented in the survey.

In 2019/20, approximately one in five (19%) of all those surveyed were in receipt of some form of rental assistance (Housing Assistance Payment (HAP), Rental Accommodation Scheme (RAS) or Rent Supplement). In 2022/23, the survey aimed to increase the proportion of tenants in receipt of rental assistance to bring it more in line with current estimates (c.30%). The proportion of tenants on rental assistance was closely monitored throughout fieldwork. Weekly field updates were provided and reminders were sent to all field personnel. During the second half of fieldwork some of the remaining sampling points were replaced with areas where there was likely to be a higher incidence of HAP. However, despite these efforts the rental assistance cohort proved to be very difficult to reach and a similar result to that of the previous survey was achieved.

2.4 Survey Instrument and Pilot

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 Voxco.

The questionnaire used in the 2022/23 survey was broadly similar to that used in the previous research to facilitate like-for-like comparisons. Any changes that were made to the 2022/23 questionnaire were done in collaboration with the RTB Research Team.

A total of 30 pilot surveys were undertaken face-to-face with eligible respondents to test the questionnaire changes. These pilot surveys were spread by region and inside/outside Rent Pressure Zones (RPZs) to ensure that a representative sample was achieved.

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.⁵

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 tail-end of 2016.⁶ Earlier surveys have also been carried out by DKM⁷ (in 2014 - on behalf of the RTB) and the Housing Agency⁸ (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.

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

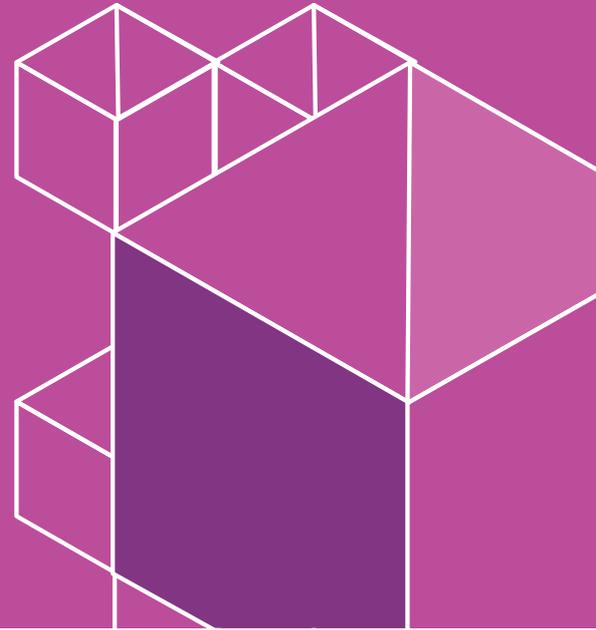
6 A Rent Pressure Zone (RPZ) is a designated area where, in general, rents cannot be increased by more than 4% per annum. For further details see <https://onestopshop.rtb.ie/rent-pressure-zones/>

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

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

Nationally Representative Results

3



This section of the report presents the findings from the 2022/23 nationally representative face-to-face survey of private tenants. Where relevant, the results of the 2019/20 survey are shown alongside those of the more recent survey.

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
- ▶ Summary of key findings
- ▶ The experience of non-Irish citizens
- ▶ The experience of older renters aged 45+

3.1 Profile of Tenants and Rental Property

The following section sets out the profile of tenants who participated in the nationally representative survey including their gender, age, socio-economic group, employment status, civil status, ethnic origin, place of birth and citizenship. It also examines the profile of rental property including dwelling type, occupancy, household composition, length of time renting and in current property, number of properties rented and property ownership.

Gender

The sample was representative of the Irish population aged 19+ living in accommodation in the private rental sector. In both 2019/20 and 2022/23, 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 3.1 shows the profile of the total sample by gender and broken down by the length of time renting.

In line with the quota, 50% of private tenants were male and 50% were female. In both waves those renting for up to 4 years were more likely to be male, whereas long-term renters (5+ years) were more likely to be female.

Table 3.1: Gender (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20				2022/23			
	Total	Renting in Total			Total	Renting in Total		
		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs
N=	1038	197	427	414	1200	250	500	450
Male	50%	58%	54%	43%	50%	52%	56%	43%
Female	50%	42%	46%	57%	50%	48%	44%	57%

Q.4 Gender

Age

The age profile of tenants was also pre-determined in 2019/20 and 2022/23. In total, 70% of tenants surveyed were aged between 25 and 44. Young adults aged 19-24 represented 13% of the total and 17% were aged 45 years or older. The largest single category was aged 25-34, accounting for 43% of all private tenants surveyed.

The majority of long-term renters (5+ years) were aged 35+ (58% in 2019/20 and 64% in 2022/23), whereas the majority of those renting for up to 4 years were aged under 35. Please see Table 3.2.

Table 3.2: Age (n=1200 (2020=1038) tenants)

Base: All tenants	2019/20				2022/23			
	Total	Renting in Total			Total	Renting in Total		
		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs
N=	1038	197	427	414	1200	250	500	450
19-24	13%	23%	16%	6%	13%	26%	16%	4%
25-34	43%	52%	45%	36%	43%	50%	49%	32%
35-44	27%	18%	24%	35%	27%	18%	24%	36%
45-54	10%	4%	11%	13%	10%	4%	9%	15%
55-64	6%	3%	4%	8%	6%	1%	2%	12%
65+	1%	1%	*	2%	1%	-	1%	2%

Q AGE

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 as per standard procedure⁹.

⁹ http://www.tara.tcd.ie/bitstream/handle/2262/68706/v13n31982_4.pdf?sequence=1

The socio-economic profile of private renters in 2019/20 and 2022/23 was similar. Table 3.3 shows that in 2022/23 the largest single socio-economic group was DE (semi-skilled and unskilled manual occupations, unemployed), accounting for 34% of responses, followed by C1 (supervisory, clerical and junior managerial, administrative, professional occupations) at 27% and C2 (skilled manual occupations) at 22%. The smallest single category was AB (higher and intermediate managerial, administrative, professional occupations) at 16%. The majority (56%) of tenants were in socio-economic group C2DE. Amongst those in receipt of any rental assistance, 84% were in socio-economic group C2DE.

Table 3.3: Socio-economic group (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20			2022/23		
	Total	Rental Assistance		Total	Rental Assistance	
		Any assistance	HAP		Any assistance	HAP
N=	1038	202	112	1200	219	180
AB	12%	4%	7%	16%	2%	3%
C1	28%	8%	8%	27%	14%	13%
C2	27%	11%	11%	22%	12%	12%
DE	34%	77%	73%	34%	72%	72%

C.8 Social class

Employment Status

Respondents were asked to describe their current employment status.

In 2022/23, the majority (68%) of tenants indicated that they were working full-time when the survey took place. This was higher than in 2019/20 (56%). A further 10% were part-time employed and 5% were looking after the family home (11% in 2019/20).

In total, 5% of tenants indicated that they were currently enrolled in third level education (8% in 2019/20). Within the 19-24 age range, this increased to 23% (31% in 2019/20). Please see Table 3.4 for more details.

Table 3.4: Employment Status (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Age				Total	Age			
		19-24	25-34	35-44	45+		19-24	25-34	35-44	45+
N=	1038	137	443	281	176	1200	158	513	325	204
Full-time employed	56%	43%	63%	57%	49%	68%	55%	73%	73%	56%
Part-time employed	10%	13%	10%	10%	8%	10%	11%	9%	9%	13%
Self-employed or working family business	2%	1%	2%	4%	3%	1%	-	2%	1%	2%
Unemployed in receipt of social/community welfare benefit	6%	4%	6%	6%	6%	6%	6%	5%	7%	6%
Third level education	8%	31%	6%	3%	1%	5%	23%	4%	1%	-
Unable to work – sickness or disability	4%	2%	2%	3%	15%	2%	1%	1%	3%	7%
Retired	2%	-	-	-	9%	1%	-	-	*	7%
Looking after family home	11%	4%	11%	15%	8%	5%	3%	5%	5%	6%
Prefer not to say	1%	3%	*	2%	1%	2%	2%	1%	1%	3%

Q.6 How would you describe your current employment status?

Civil Status

The civil status of respondents is set out in Table 3.5. In 2022/23, more than one in two (54%) tenants were either married or cohabiting, 35% were single adults and 7% were divorced/widowed/separated. The profile was similar in 2019/20.

The results indicate that non-Irish citizens who were renting were more likely to be married than Irish citizens (57% vs 25% in 2022/23). The 2019/20 survey yielded a similar result.

Table 3.5: Civil Status (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20			2022/23		
	Total	Citizenship		Total	Citizenship	
		Irish	Non-Irish		Irish	Non-Irish
N=	1038	640	393	1200	722	476
Married/Civil partnership	34%	24%	51%	38%	25%	57%
Cohabiting	22%	27%	13%	16%	19%	12%
Single – never married	31%	34%	27%	35%	42%	23%
Divorced	3%	2%	3%	2%	3%	2%
Widowed	2%	2%	1%	2%	2%	1%
Separated	4%	6%	1%	3%	4%	3%
Prefer not to say	5%	5%	4%	4%	6%	1%

Q.10 What is your marital status?

Ethnic Origin

As part of this research tenants were also asked to self-identify their ethnicity from a list of options. In 2022/23, 53% of tenants surveyed identified themselves as ‘white Irish’ compared to 59% in 2019/20. Table 3.6 indicates that the second biggest ethnic cohort was ‘any other white background’ (25% in 2022/23), followed by ‘Asian or Asian Irish or Chinese or other Asian background’ (9%). The ‘Black or Black Irish or African or other Black background’ cohort increased from 3% in 2019/20 to 6% in 2022/23.

Table 3.6: Ethnic Origin (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20			2022/23		
	Total	Citizenship		Total	Citizenship	
		Irish	Non-Irish		Irish	Non-Irish
N=	1038	640	393	1200	722	476
White Irish	59%	92%	5%	53%	86%	5%
White Irish Traveller	1%	1%	*	1%	1%	1%
Any other white background	23%	2%	58%	25%	6%	55%
Black or Black Irish or African	3%	-	8%	5%	2%	9%
Black or Black Irish - Any other Black background	*	*	1%	1%	1%	1%
Asian or Asian Irish or Chinese	4%	2%	8%	6%	3%	10%
Asian or Asian Irish - Any other Asian Background	6%	1%	13%	3%	2%	6%
Other, including mixed background	3%	1%	6%	5%	1%	13%
Prefer not to say	1%	1%	1%	*	*	1%

Q.71 Do you mind if I ask about your ethnicity? Are you...

Place of Birth

The majority of tenants surveyed in 2022/23 indicated that they were born in the ‘Republic of Ireland’ (54%), with a further indicating that they were born ‘inside the EU’ and 22% stating that they were born in the ‘rest of the world’ (up from 18% in 2019/20). Tenants born in the ‘United Kingdom’ represented 2% of respondents overall (3% in 2019/20) as can be seen in Table 3.7.

Table 3.7: Place of birth (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20			2022/23		
	Total	Citizenship		Total	Citizenship	
		Irish	Non-Irish		Irish	Non-Irish
N=	1038	640	393	1200	722	476
Republic of Ireland	57%	93%	*	54%	90%	*
United Kingdom	3%	1%	5%	2%	1%	4%
Inside the EU	21%	2%	52%	21%	4%	47%
Rest of the world	18%	4%	42%	22%	5%	48%

Q.72 What is your place of birth?

Citizenship

In 2022/23, Irish citizens accounted for 60% of all tenants surveyed, followed by EU citizens at 19% and citizens of the ‘rest of the world’ at 20%. Citizens of the United Kingdom (2%) represented the smallest share. The 2019/20 profile was similar. A small number of respondents had dual citizenship so multi-coding was allowed at this question.

Table 3.8 shows that nearly half (47%) of all non-Irish citizens were EU citizens, 49% were ‘rest of the world citizens’ (up from 43% in 2019/20) and 4% were UK citizens.

Table 3.8: Citizenship (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20			2022/23		
	Total	Citizenship		Total	Citizenship	
		Irish	Non-Irish		Irish	Non-Irish
N=	1038	640	393	1200	722	476
Republic of Ireland	62%	100%	-	60%	100%	-
United Kingdom	2%	*	6%	2%	*	4%
Inside the EU	20%	1%	52%	19%	1%	47%
Rest of the world	17%	1%	43%	20%	1%	49%

Q.73 Where do you have citizenship?

Dwelling Type

The dwelling type profile was also somewhat pre-determined in 2019/20 and 2022/23 as minimum quotas were introduced before fieldwork began to ensure that tenants renting privately in apartments were adequately represented in the survey. In 2019/20, more than a quarter (26%) of surveys were achieved amongst private renters in apartments (purpose-built developments or apartments/flats within a converted house). In 2022/23, the minimum quota on apartments was increased to 35% as this was considered more in line with current CSO estimates.

In 2022/23, a semi-detached house was still the most common dwelling type at a national level with 33% of tenants residing in a semi-detached house (down from 40% in 2019/20). This was followed by an apartment in a purpose-built development (27% vs 22% in 2019/20) and a terraced house (20% vs 25% in 2019/20). ‘A detached house’ represented 10% of all tenancies closely followed by ‘an apartment flat within a converted house’ (9% up from 5% in 2019/20).

In Dublin, the most common dwelling type was ‘an apartment in a purpose-built development’ (38%), followed by ‘a semi-detached house’ (21%) and ‘a terraced house’ (19%). Outside of the capital, ‘a semi-detached house’ represented the greatest share (41%) followed by ‘a terraced house’ (20%) and ‘an apartment in a purpose-built development’ (20%). Please see Table 3.9 for more details.

Table 3.9: Dwelling Type (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	1038	407	631	732	305	1200	472	728	905	295
A semi-detached house	40%	23%	50%	37%	45%	33%	21%	41%	28%	50%
A terraced house	25%	26%	24%	24%	28%	20%	19%	20%	21%	17%
An apartment in a purpose-built development	22%	35%	13%	26%	11%	27%	38%	20%	32%	13%
A detached house	8%	3%	10%	6%	11%	10%	8%	12%	9%	14%
An apartment/ flat within a converted house	5%	9%	2%	5%	4%	9%	12%	6%	10%	6%
Other	2%	3%	*	2%	-	1%	2%	*	1%	0%

Q.11 Is this property a....?

Occupancy

According to the 2022/23 survey results illustrated in Table 3.10, the average number of people living in a rental property was 3.14. This was similar to the 2019/20 average (3.04) and the median was the same (3).

In 2022/23, the average was highest amongst tenants aged 19-24 (3.40), non-Irish citizens (3.37) and those renting a house (3.4) although the median was still 3 across all these subgroups.

Table 3.10: Occupancy (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Age				Total	Age			
		19-24	25-34	35-44	45+		19-24	25-34	35-44	45+
N=	1038	137	443	281	176	1200	158	513	325	204
1 person	12%	6%	10%	9%	26%	10%	10%	5%	9%	24%
2 people	27%	29%	28%	23%	28%	26%	23%	29%	22%	27%
3 people	25%	26%	25%	24%	25%	27%	22%	30%	29%	19%
4 people	24%	28%	25%	28%	13%	23%	22%	25%	25%	19%
5 people	8%	8%	7%	11%	4%	8%	11%	6%	12%	6%
6 people or more	4%	3%	4%	6%	3%	5%	12%	6%	2%	5%
Mean	3.04	3.11	3.03	3.35	2.52	3.14	3.11	3.03	3.35	2.52
Median	3	3	3	3	2	3	3	3	3	2

Q.12 Including yourself how many people live in this property?

Base: All tenants	2019/20			2022/23		
	Total	Citizenship		Total	Citizenship	
		Irish	Non-Irish		Irish	Non-Irish
N=	1038	640	393	1200	722	476
1 person	12%	16%	6%	10%	13%	6%
2 people	27%	28%	26%	26%	27%	24%
3 people	25%	25%	26%	27%	28%	26%
4 people	24%	21%	27%	23%	21%	27%
5 people	8%	7%	10%	8%	7%	11%
6 people or more	4%	3%	6%	5%	5%	7%
Mean	3.04	2.89	3.28	3.14	2.99	3.37
Median	3	3	3	3	3	3

Base: All tenants	2019/20			2022/23		
	Total	Property Type		Total	Property Type	
		House	Apartment		House	Apartment
N=	1038	748	275	1200	761	428
1 person	12%	8%	24%	10%	6%	16%
2 people	27%	22%	39%	26%	21%	35%
3 people	25%	26%	22%	27%	28%	25%
4 people	24%	28%	13%	23%	27%	18%
5 people	8%	10%	2%	8%	11%	3%
6 people or more	4%	5%	1%	5%	7%	3%
Mean	3.04	3.31	2.34	3.14	3.40	2.68
Median	3	3	2	3	3	2

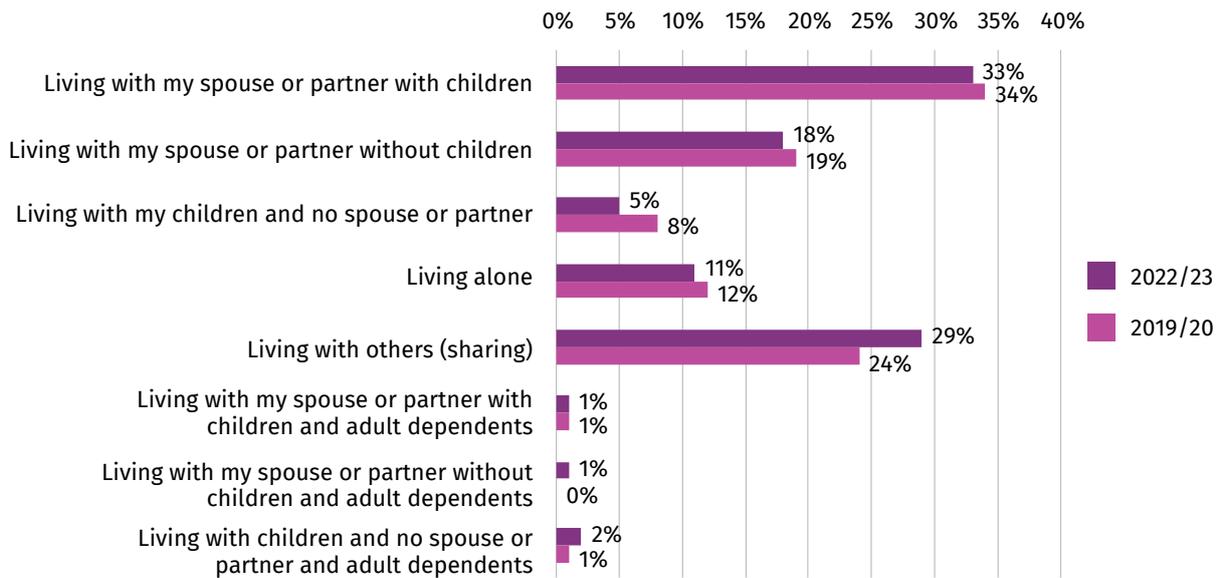
Q.12 Including yourself how many people live in this property?

Household Composition

Figure 3.1 sets out the household composition for tenants surveyed in 2019/20 and 2022/23.

Tenants ‘living with my spouse or partner with children’ represented the greatest share (34% in 2019/20 and 33% in 2022/23), followed by ‘living with others (sharing)’ (29% in 2022/23 up from 24% in 2019/20) and ‘living with my spouse or partner without children’ (19% in 2019/20 and 18% in 2022/23). The proportion who were living alone was more or less on par in 2019/20 and 2022/23 (12% vs 11%).

Figure 3.1: Household Composition (n=1200 (2019/20=1038) tenants)



Q.13 Which of the following best describe your situation?

In 2022/23, the majority (64%) of young adults aged 19-24 were ‘living with others (sharing)’, up from 54% in 2019/20. Approximately one in four (25%) older renters aged were ‘living alone’, on par with 2019/20 (26%). Half (50%) of all 35-44 year old tenants were ‘living with my spouse or partner with children’, up from 46% in 2019/20. This was more prevalent among non-Irish citizens accounting for 44% of their living situations in 2022/23.

In Dublin, the most common living situation, as determined from the survey, was ‘living with others (sharing)’ (33% in 2022/23 up from 27% in 2019/20).

Table 3.11: Household Composition (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Age				Total	Age			
		19-24	25-34	35-44	45+		19-24	25-34	35-44	45+
N=	1038	137	443	281	176	1200	158	513	325	204
Living with my spouse or partner with children	34%	6%	35%	46%	30%	33%	8%	31%	50%	32%
Living with my spouse or partner without children	19%	19%	20%	15%	21%	18%	8%	22%	14%	20%
Living with my children and no spouse or partner	8%	4%	6%	12%	9%	5%	7%	3%	7%	6%
Living alone	12%	6%	10%	8%	26%	11%	13%	6%	9%	25%
Living with others (sharing)	24%	54%	26%	15%	9%	29%	64%	35%	14%	11%
Living with my spouse or partner with children and adult dependents	1%	1%	*	2%	-	1%	-	1%	1%	1%
Living with my spouse or partner without children and adult dependents	*	-	*	*	1%	1%	1%	1%	*	1%
Living with children and no spouse or partner and adult dependents	1%	1%	-	1%	1%	2%	1%	1%	3%	3%
Refused	2%	3%	2%	1%	2%	*	-	*	1%	1%

Base: All tenants	2019/20			2022/23		
	Total	Citizenship		Total	Citizenship	
		Irish	Non-Irish		Irish	Non-Irish
N=	1038	640	393	1200	722	476
Living with my spouse or partner with children	34%	28%	42%	33%	26%	44%
Living with my spouse or partner without children	19%	20%	17%	18%	17%	18%
Living with my children and no spouse or partner	8%	9%	6%	5%	6%	4%
Living alone	12%	15%	6%	11%	14%	6%
Living with others (sharing)	24%	24%	24%	29%	33%	23%
Living with my spouse or partner with children and adult dependents	1%	*	1%	1%	*	2%
Living with my spouse or partner without children and adult dependents	*	*	1%	1%	1%	*
Living with children and no spouse or partner and adult dependents	1%	1%	1%	2%	2%	2%
Refused	2%	2%	1%	*	1%	*

Q.13 Which of the following best describe your situation?

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	1038	407	102	631	529	1200	472	728	905	295
Living with my spouse or partner with children	34%	25%	39%	30%	42%	33%	31%	35%	32%	36%
Living with my spouse or partner without children	19%	24%	15%	21%	13%	18%	17%	18%	17%	20%
Living with my children and no spouse or partner	8%	4%	10%	7%	11%	5%	4%	6%	5%	7%
Living alone	12%	15%	10%	11%	14%	11%	11%	11%	10%	14%
Living with others (sharing)	24%	27%	21%	27%	17%	29%	33%	26%	32%	19%
Living with my spouse or partner with children and adult dependents	1%	*	1%	1%	*	1%	*	1%	1%	2%
Living with my spouse or partner without children and adult dependents	*	-	1%	*	1%	1%	1%	*	*	1%
Living with children and no spouse or partner and adult dependents	1%	1%	1%	1%	*	2%	3%	1%	2%	1%
Refused	2%	3%	1%	2%	1%	*	1%	*	*	*

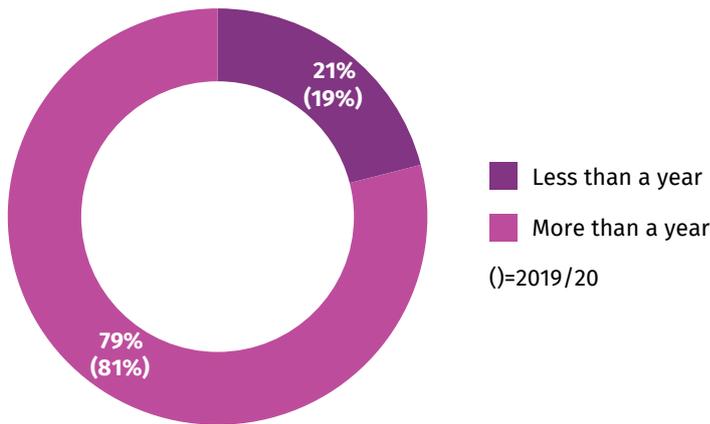
Q.13 Which of the following best describe your situation?

Length of Time Renting

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

In 2022/23, out of the 1,200 tenants surveyed, 79% stated that they have been renting for more than a year and 21% stated that they have been renting for less than a year. These results are more or less in line with the 2019/20 survey as can be seen in Figure 3.2.

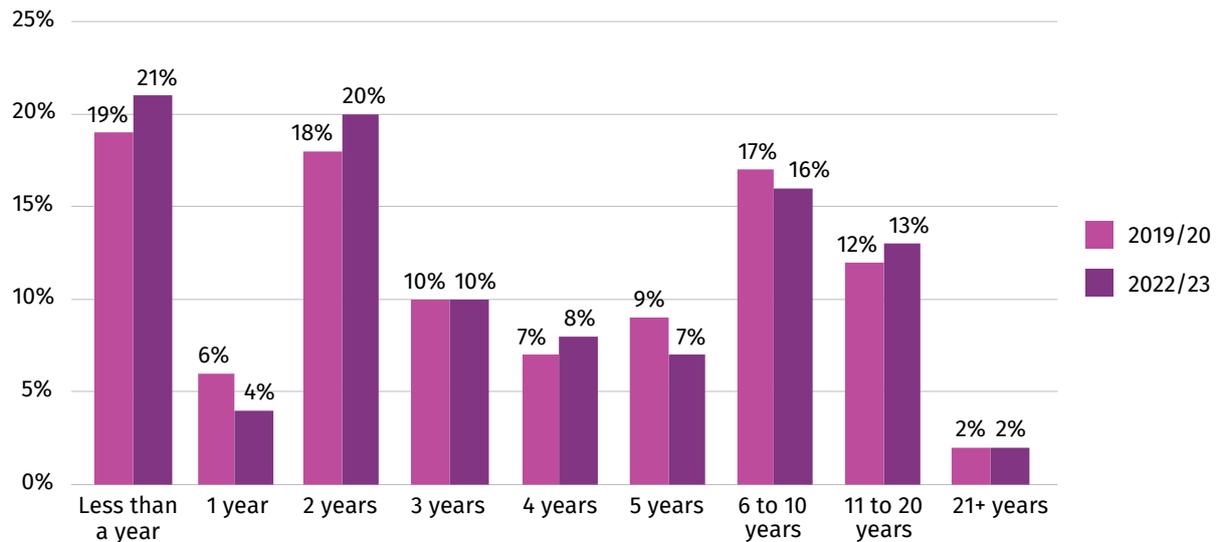
Figure 3.2: Length of time renting in the private rental sector (n=1200 (2019/20=1038) tenants)



Q.15 How long have you been renting in total?

Amongst the total sample of private renters, the average length of time renting was 5.03 years in 2022/23 (5.01 years in 2019/20). The median was three years. Please see Figure 3.3.

Figure 3.3: Length of time renting in the private rental sector (n=1200 (2019/20=1038) tenants)



Mean: 5.03 (2019/20=5.01) years Median: 3 (2019/20=3) years

Q.16 How many years...

In 2022/23, the average length of time renting in the private rental sector was higher amongst older tenants age 35+, lower socio-economic group DE, those living outside of RPZs and those in receipt of rental assistance (e.g. HAP, RAS or RS). The details are set out in Table 3.12.

Table 3.12: Length of time renting in the private rental sector (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Age				Total	Age			
		19-24	25-34	35-44	45+		19-24	25-34	35-44	45+
N=	1038	137	443	281	176	1200	158	513	325	204
Less than a year	19%	33%	23%	13%	8%	21%	41%	25%	14%	7%
1 year	6%	7%	5%	6%	5%	4%	7%	5%	2%	1%
2 years	18%	23%	19%	17%	14%	20%	28%	24%	16%	13%
3 years	10%	14%	12%	9%	7%	10%	7%	11%	10%	9%
4 years	7%	6%	8%	4%	10%	8%	7%	8%	8%	7%
5 years	9%	9%	10%	9%	8%	7%	4%	7%	7%	9%
6 to 10 years	17%	7%	15%	21%	25%	16%	3%	15%	23%	18%
11 to 20 years	12%	1%	8%	21%	18%	13%	2%	5%	19%	29%
21+ years	2%	1%	1%	1%	4%	2%	-	*	1%	7%
Mean	5.01	2.46	3.99	6.12	7.77	5.03	2.00	3.59	6.28	9.00
Median	3	2	3	5	5	3	2	2	4	7

Base: All tenants	2019/20					2022/23				
	Total	Social Class				Total	Social Class			
		AB	C1	C2	DE		AB	C1	C2	DE
N=	1038	125	289	276	348	1200	197	325	270	408
Less than a year	19%	16%	31%	12%	15%	21%	26%	26%	20%	15%
1 year	6%	7%	5%	7%	4%	4%	5%	3%	4%	3%
2 years	18%	22%	22%	21%	12%	20%	25%	23%	20%	16%
3 years	10%	14%	14%	9%	7%	10%	7%	9%	9%	12%
4 years	7%	6%	7%	6%	8%	8%	9%	9%	8%	7%
5 years	9%	8%	7%	10%	10%	7%	5%	6%	9%	7%
6 to 10 years	17%	19%	10%	20%	20%	16%	16%	13%	17%	19%
11 to 20 years	12%	9%	3%	13%	20%	13%	7%	10%	13%	17%
21+ years	2%	-	1%	2%	3%	2%	1%	1%	*	3%
Mean	5.01	4.43	2.97	5.41	6.60	5.03	3.76	4.15	4.96	6.40
Median	3	3	2	4	5	3	2	2	3	4

Q.16 How many years...

Base: All tenants	2019/20			2022/23		
	Total	Rental Assistance		Total	Rental Assistance	
		Any assistance	HAP		Any assistance	HAP
N=	1038	202	112	1200	219	180
Less than a year	19%	10%	8%	21%	10%	11%
1 year	6%	4%	5%	4%	1%	1%
2 years	18%	12%	18%	20%	20%	21%
3 years	10%	9%	9%	10%	11%	11%
4 years	7%	7%	8%	8%	7%	8%
5 years	9%	12%	14%	7%	8%	9%
6 to 10 years	17%	22%	23%	16%	22%	23%
11 to 20 years	12%	20%	16%	13%	15%	13%
21+ years	2%	3%	-	2%	6%	4%
Mean	5.01	7.27	5.54	5.03	7.04	6.63
Median	3	5	5	3	5	4

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	1038	407	631	732	305	1200	472	728	905	295
Less than a year	19%	20%	18%	18%	20%	21%	25%	18%	23%	13%
1 year	6%	8%	4%	6%	4%	4%	3%	4%	4%	3%
2 years	18%	23%	15%	21%	13%	20%	23%	19%	21%	19%
3 years	10%	10%	10%	10%	11%	10%	8%	11%	10%	11%
4 years	7%	5%	8%	7%	8%	8%	6%	9%	7%	10%
5 years	9%	10%	9%	9%	9%	7%	7%	7%	7%	8%
6 to 10 years	17%	16%	18%	17%	17%	16%	17%	16%	16%	17%
11 to 20 years	12%	6%	16%	10%	18%	13%	8%	15%	11%	18%
21+ years	2%	1%	1%	2%	-	2%	1%	2%	2%	1%
Mean	5.01	4.17	5.55	4.91	5.24	5.03	4.29	5.51	4.70	6.05
Median	3	2	4	3	4	3	2	3	3	4

Q.16 How many years...

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.

In 2022/23, a total of 95 moved into their current property 'more than a year ago'. This compares to a total of 93% in 2019/20 as can be seen in Table 3.13.

Amongst those renting for one year or longer and living in Dublin, 98% moved into their current property 'more than a year ago'. This is on par with 2019/20.

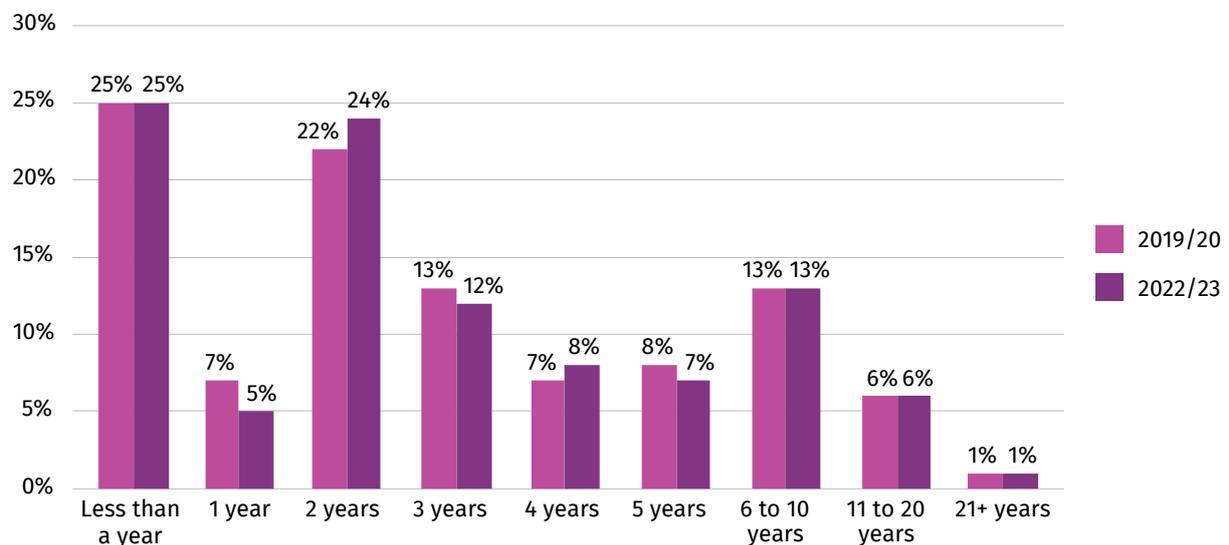
Table 3.13: When moved into current property excluding tenants that have been renting for less than a year (n=950 (2019/20=841) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	841	327	515	298	243	950	351	599	693	257
Less than a year ago	7%	2%	10%	6%	10%	5%	2%	7%	5%	7%
More than a year ago	93%	98%	90%	94%	90%	95%	98%	93%	95%	93%

Q.18a When did you move into your current property?

Amongst the total sample of private renters in 2022/23, tenants moved into their current property 3.44 years ago on average (3.79 years in 2019/20). The median was two years. Please see Figure 3.4.

Figure 3.4: Recency of moving into current property (n=1200 (2019/20=1038) tenants)



Mean: 3.44 (2019/20=3.79) years Median: 2 (2019/20=2) years

Q.18b How many years ago moved into current property?

On average, young adults aged 19-24 moved into their current property 1.52 years ago (1.96 years ago in 2019/20). The average for older adults aged 45+ was 6.16 years ago (6.35 years ago in 2019/20).

Table 3.14: Recency of moving into current property (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Age				Total	Age			
		19-24	25-34	35-44	45+		19-24	25-34	35-44	45+
N=	1038	137	443	281	176	1200	158	513	325	204
Less than a year	25%	39%	28%	18%	14%	25%	45%	30%	18%	8%
1 year	7%	10%	6%	8%	4%	5%	6%	7%	5%	1%
2 years	22%	24%	23%	22%	15%	24%	30%	26%	21%	19%
3 years	13%	14%	14%	11%	11%	12%	7%	11%	14%	12%
4 years	7%	4%	8%	4%	11%	8%	5%	8%	9%	9%
5 years	8%	4%	9%	10%	6%	7%	3%	6%	8%	10%
6 to 10 years	13%	4%	8%	17%	23%	13%	4%	10%	19%	21%
11 to 20 years	6%	1%	3%	9%	12%	6%	-	2%	7%	19%
21+ years	1%	1%	1%	1%	2%	*	-	*	-	1%
Mean	3.79	1.96	2.98	4.35	6.35	3.44	1.52	2.57	4.02	6.16
Median	2	2	2	3	4	2	1	2	3	5

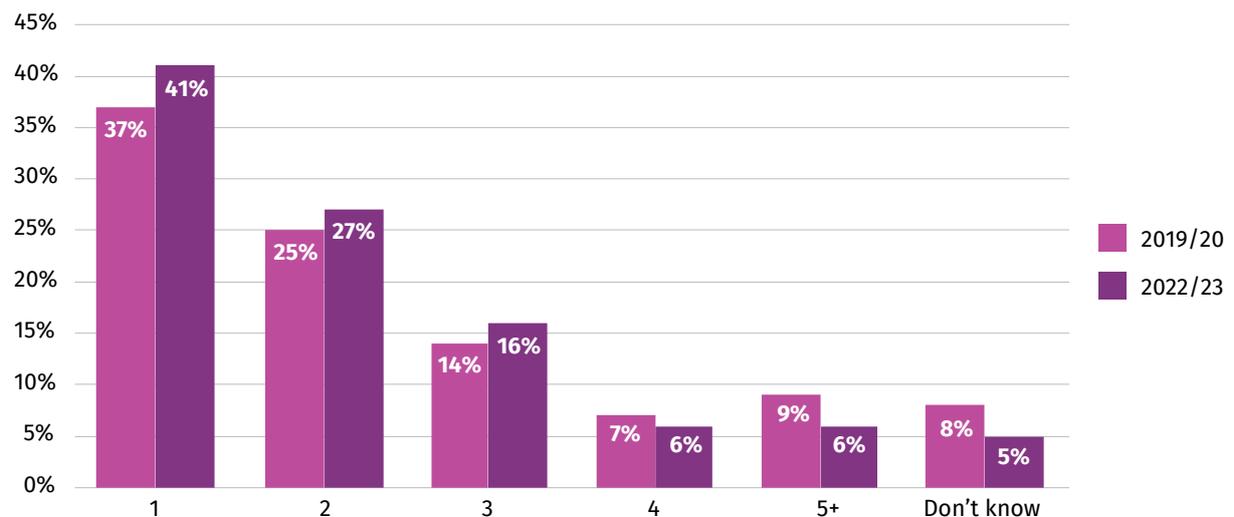
Q.18b How many years ago moved into current property?

Number of Separate Properties Rented in Ireland

Figure 3.5 sets out the number of separate properties rented in Ireland in the private rental sector.

In 2022/23, the average number of separate properties rented was 2.19 (down from 2.43 in 2019/20). The median was two properties. Tenants renting one property represented the greatest share (41% up from 37% in 2019/20). The proportion that rented five or more properties over the years declined from 9% in 2019/20 to 6% in 2022/23.

Figure 3.5: Number of separate properties rented in Ireland in the private rental sector (n=1200 (2019/20=1038) tenants)



Mean: 2.19 (2019/20=2.43) properties Median: 2 (2019/20=2) properties

Q17 How many separate properties have you rented in Ireland over the years in the private rental sector?

The results were fairly consistent across the different demographic subgroups. Not surprisingly, the average number of properties rented was higher for those tenants who were renting for longer as can be seen in Table 3.15.

Table 3.15: Number of separate properties rented in Ireland in the private rental sector (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20				2022/23			
	Total	Renting in Total			Total	Renting in Total		
		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs
N=	1038	197	427	414	1200	250	500	450
1	37%	62%	37%	26%	41%	59%	44%	27%
2	25%	16%	29%	24%	27%	22%	32%	23%
3	14%	8%	15%	16%	16%	8%	14%	22%
4	7%	4%	6%	10%	6%	6%	4%	8%
5+	9%	6%	7%	14%	6%	2%	4%	11%
Don't know	8%	4%	6%	11%	5%	2%	2%	9%
Mean	2.43	2.00	2.25	2.85	2.19	1.69	1.98	2.76
Median	2	1	2	2	2	1	2	2

Q17 How many separate properties have you rented in Ireland over the years in the private rental sector?

Property Ownership

Respondents were asked if they currently own a property.

Property ownership was low overall in 2022/23 with just 3% of tenants claiming to own a property. This compares to a total of 7% in 2019/20 as can be seen in Table 3.16.

In 2022/23, property ownership was highest amongst tenants aged 35-44 (6%) and socio-economic group AB (12%).

Table 3.16: Current Property Ownership (n=1200 (2019/20=997) tenants)

Base: All tenants	2019/20									2022/23								
	Total	Age				Social Class				Total	Age				Social Class			
		19-24	25-34	35-44	45+	AB	C1	C2	DE		19-24	25-34	35-44	45+	AB	C1	C2	DE
N=	997	131	426	269	171	117	280	272	327	1200	158	513	325	204	197	325	270	408
Yes	7%	1%	4%	9%	16%	11%	12%	6%	3%	3%	-	3%	6%	3%	12%	2%	2%	1%
No	93%	99%	96%	91%	84%	89%	88%	94%	97%	97%	100%	97%	94%	97%	88%	98%	98%	99%

Q.17b Do you currently own a property?

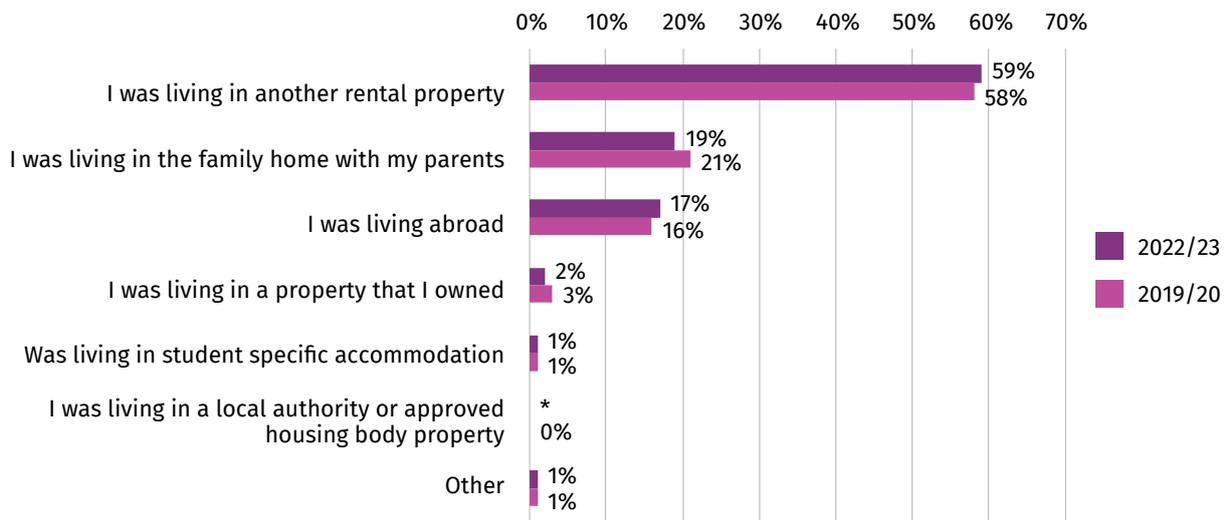
Amongst those that owned a property in 2022/23, one in four (25%) had the property let out to tenants at the time they were surveyed. This was somewhat lower than 2019/20 when nearly half (48%) had the property let out to tenants. However, this result is indicative only given the low number of respondents who were asked this question in 2022/23 (40 respondents).

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.

The 2019/20 results indicated that the majority of tenants had a history of renting. The 2022/23 results were very similar with 59% stating that they were ‘living in another rental property’ before moving into their current rental property. One in five (19%) were ‘living in the family home with my parents’ and 17% were ‘living abroad’. Please see Figure 3.6 for details.

Figure 3.6: Where lived prior to moving into current rental property (n=1200 (2019/20=1,038) tenants)



Q.19 Before moving into your current rental property what best describes where you lived?

As was the case in 2019/20, the results indicate that the majority of adults aged 25+ in the 2022/23 survey had a history of renting (‘living in another rental property’). More than half of all young adults aged 19-24 were ‘living in the family home with parents’ before moving into their current rental property (56% in 2019/20 and 55% in 2022/23).

Table 3.17: Where lived prior to moving into current rental property (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Age				Total	Age			
		19-24	25-34	35-44	45+		19-24	25-34	35-44	45+
N=	1038	137	443	281	176	1200	158	513	325	204
I was living in another rental property	58%	31%	60%	61%	68%	59%	27%	62%	66%	65%
I was living in the family home with my parents	21%	56%	20%	14%	9%	19%	55%	18%	10%	8%
I was living abroad	16%	12%	17%	19%	12%	17%	9%	17%	20%	18%
I was living in a property that I owned	3%	-	*	4%	10%	2%	1%	1%	3%	6%
Was living in student specific accommodation	1%	1%	2%	1%	-	1%	8%	1%	-	-
I was living in a local authority or approved housing body property	*	-	*	-	1%	*	-	*	1%	*
Other	1%	1%	1%	1%	-	1%	-	2%	1%	3%

Q.19 Before moving into your current rental property what best describes where you lived?

3.2 Renting Experience

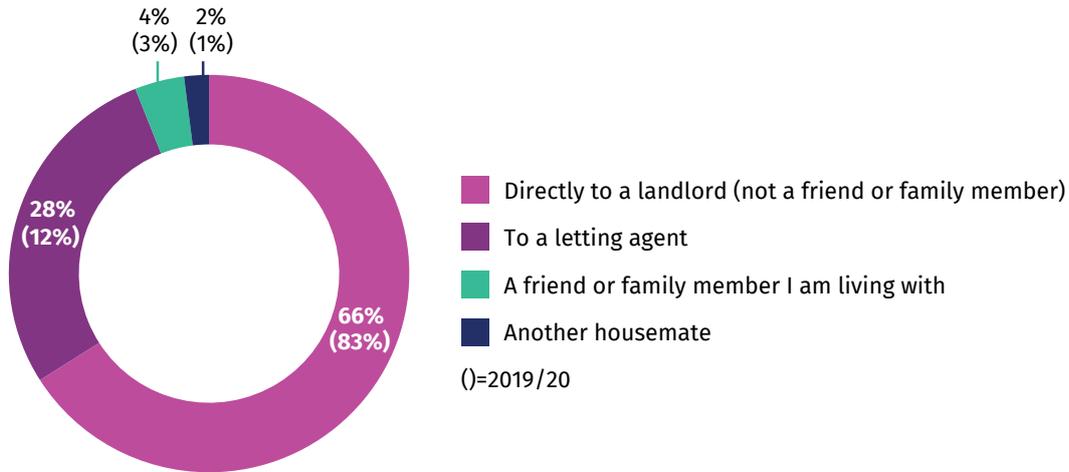
This section of the survey asked a range of questions about the renting experience including paying rent, documentation required prior to renting, deposit paid, total rent paid on the property, individual rent paid by the tenant, percentage of monthly net income spent on rent, ability to pay monthly rent, rent level when surveyed vs when first moved in, most recent rent increase, RPZs, rental assistance and rating of rental experience.

Paying Rent

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

Figure 3.7 shows that in 2022/23 the majority of tenants (66%) were paying rent ‘directly to a landlord (not a friend or family member)’. The figure for 2019/20 was higher (83%). A total of 28% were paying rent ‘to a letting agent’, compared to 12% in 2019/20. The remainder were paying rent to ‘a friend or family member I am living with’ (4%) or ‘another housemate’ (2%).

Figure 3.7: Who pay rent to each month excluding tenants in receipts of rental assistance (n=982 (2019/20=836) tenants)



Q.22a Who do you pay your rent to each month?

These results were fairly consistent across the different demographic subgroups although there were some differences depending on how long tenants had been renting. In 2022/23, more than a third (34%) of those renting less than a year paid their rent ‘to a letting agent’ (compared to 28% of the total). Three quarters (74%) of those renting for five years or more paid their rent ‘directly to a landlord’ (compared to 66% of the total). The details are included in Table 3.18.

Table 3.18: Who pay rent to each month excluding tenants in receipt of rental assistance (n=982 (2019/20=836) tenants)

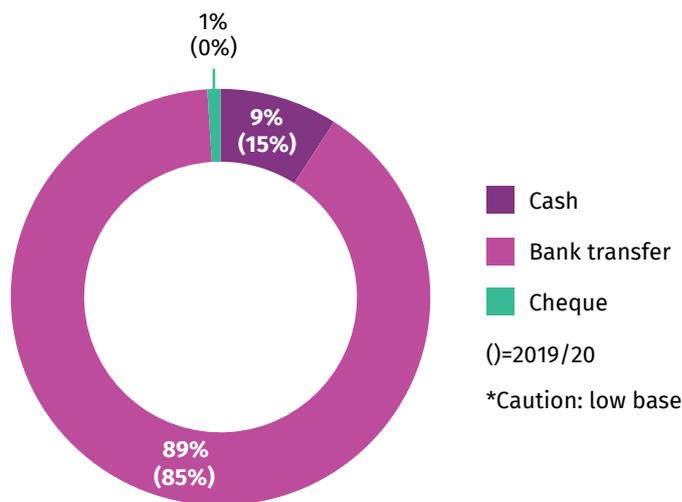
Base: All tenants	2019/20				2022/23			
	Total	Renting in Total			Total	Renting in Total		
		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs
N=	836	176	361	299	982	229	414	339
Directly to a landlord (not a friend or family member)	83%	77%	85%	85%	66%	52%	67%	74%
To a letting agent	12%	14%	11%	11%	28%	34%	28%	23%
A friend or family member I am living with	3%	5%	2%	3%	4%	8%	4%	2%
Another housemate	1%	4%	1%	1%	2%	6%	1%	1%

Q.22a Who do you pay your rent to each month?

Figure 3.8 sets out the methods that tenants used to pay rent.

Tenants that paid their rent by ‘bank transfer’ increased in proportion from 85% in 2019/20 to 89% in 2022/23. Tenants who paid their rent with ‘cash’ declined from 15% in 2019/20 to 9% in 2022/23.

Figure 3.8: Methods used to pay rent excluding tenants in receipt of rental assistance (n=982 (2019/20=808) tenants)



Q.22b Which of the following methods do you use to pay your rent?

'Cash' was a more popular payment method amongst young adults aged 19-24 (16% in 2022/23) and socio-economic group DE (15% in 2022/23). Table 3.19 has more details.

Table 3.19: Methods used to pay rent excluding tenants in receipt of rental assistance (n=982 (2019/20=808) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Age				Total	Age			
		19-24	25-34	35-44	45+		19-24	25-34	35-44	45+
N=	808	117	355	210	126	982	133	444	259	145
Cash	15%	25%	13%	14%	10%	9%	16%	8%	7%	12%
Bank transfer	85%	73%	87%	86%	90%	89%	84%	91%	91%	88%
Cheque	*	1%	-	-	1%	1%	1%	1%	2%	0%

Base: All tenants	2019/20					2022/23				
	Total	Social Class				Total	Social Class			
		AB	C1	C2	DE		AB	C1	C2	DE
N=	808	110	266	250	182	982	193	294	244	251
Cash	15%	6%	12%	13%	27%	9%	4%	8%	9%	15%
Bank transfer	85%	94%	88%	87%	72%	89%	93%	92%	90%	83%
Cheque	*	-	-	-	1%	1%	2%	*	1%	1%

Q.22b Which of the following methods do you use to pay your rent?

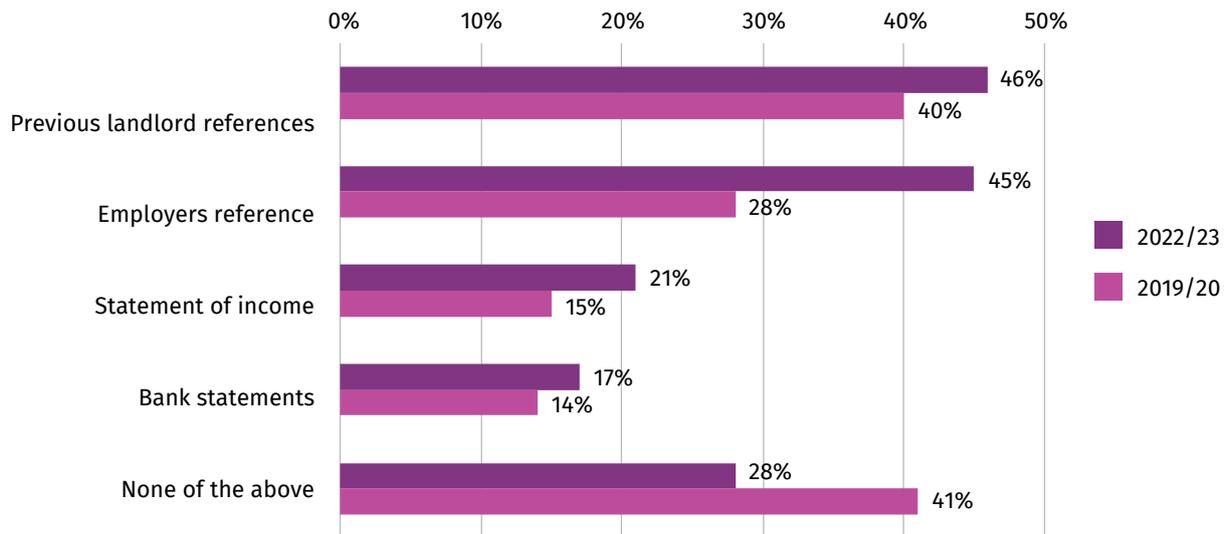
Amongst those who paid their rent to a letting agent, 97% paid by 'bank transfer'.

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.

The proportion of those surveyed who stated that they were required to provide the landlord with documentation (any) prior to renting their current property increased from 59% in 2019/20 to 72% in 2022/23. In 2022/23, ‘previous landlord references’ were most often required (46%) followed by an ‘employer’s reference’ (45% up from 28% in 2019/20). One fifth (21%) were required to provide a ‘statement of income’ and 17% mentioned that ‘bank statements’ were needed. Please see Figure 3.9.

Figure 3.9: Documentation required prior to renting (n=1200 (2019/20=1038) tenants)



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

Table 3.20 shows that a higher proportion of young adults aged 19-24 were not required to provide the landlord with any documentation when compared to the total sample (41% vs 28% in 2022/23). Similarly, in 2022/23 a higher proportion of socio-economic group DE (37%) and those on rental assistance (35%) were not required to provide the landlord with any documentation when compared to the total sample.

Table 3.20: Documentation required prior to renting (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Age				Total	Age			
		19-24	25-34	35-44	45+		19-24	25-34	35-44	45+
N=	1038	137	443	281	176	1200	158	513	325	204
Previous landlord references	40%	24%	41%	44%	46%	46%	23%	50%	54%	43%
Employers reference	28%	29%	32%	26%	22%	45%	34%	51%	47%	33%
Statement of income	15%	13%	15%	14%	17%	21%	17%	22%	23%	18%
Bank statements	14%	16%	15%	16%	11%	17%	22%	16%	16%	17%
None of the above	41%	48%	39%	39%	41%	28%	41%	26%	24%	32%

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

Base: All tenants	2019/20			2022/23		
	Total	Rental Assistance		Total	Rental Assistance	
		Any assistance	HAP		Any assistance	HAP
N=	1038	202	112	1200	219	180
Previous landlord references	40%	43%	41%	46%	41%	43%
Employers reference	28%	12%	13%	45%	33%	33%
Statement of income	15%	9%	8%	21%	12%	12%
Bank statements	14%	9%	10%	17%	14%	15%
None of the above	41%	51%	53%	28%	35%	35%

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

Amongst those who paid their rent to a letting agent, 88% were required to provide the landlord with any documentation prior to renting their current property.

In addition, a higher proportion of those renting an apartment versus those renting a house were required to provide documentation (78% vs 68% in 2022/23). Specifically, 57% of those renting an apartment provided the landlord with an employer’s reference compared to 38% of tenants renting a house.

The increase in apartments from 26% in 2019/20 to 35% in 2022/23 has most likely contributed to the higher proportion of tenants overall who were required to provide documentation prior to renting their current property (from 59% in 2019/20 to 72% in 2022/23).

Deposit Paid

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

The 2022/23 survey found that the average deposit paid by tenants when first renting their current property was €1,239.75. The median was €1,000. Figure 3.10 shows that the average deposit was lower in 2019/20 (€1,073.64) but the median was the same (€1,000). In 2022/23, a total of 14% paid up to €500, one third (32%) paid between €501-€1,000 and 46% paid more than €1,000 (up from 37% in 2019/20). A small proportion (8%) stated that they paid no deposit at all when first renting their current property (down from 13% in 2019/20).

Figure 3.10: Deposit paid when first renting current property (n=1200 (2019/20=997) tenants)



Mean: €1,239.75 (2019/20 = €1,073.64) Median: €1,000 (2019/20 = €1,000)

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

Table 3.21 shows that in 2022/23 the median deposit paid was highest amongst socio-economic group AB (€1,650 vs €1,300 in 2019/20), tenants renting in Dublin (€1,650 vs €1,450 in 2019/20), inside RPZs (€1,250 vs €1,200 in 2019/20) and amongst those renting an apartment (1,300 vs €1,100 in 2019/20).

Once again, the increase in apartments from 26% in 2019/20 to 35% in 2022/23 may have contributed to a higher average deposit in 2022/23 (€1,239.75 vs €1,073.64 in 2019/20), although the median deposit paid remains the same in both surveys (€1,000).

Table 3.21: Deposit paid when first renting current property (n=1200 (2019/20=997) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Social Class				Total	Social Class			
		AB	C1	C2	DE		AB	C1	C2	DE
N=	997	117	280	272	327	1200	197	325	270	408
Up to €100	*	-	-	-	1%	*	-	1%	*	*
€101 to €500	16%	8%	24%	11%	17%	14%	6%	15%	15%	16%
€501 to €1000	33%	21%	27%	38%	38%	32%	16%	34%	34%	36%
€1001+	37%	58%	43%	41%	22%	46%	75%	42%	49%	34%
No deposit	13%	13%	5%	10%	22%	8%	3%	8%	2%	14%
Mean	€1073.64	€1475.69	€1077.51	€1088.70	€893.33	€1239.75	€1732.32	€1163.60	€1220.03	€1048.30
Median	€1000	€1300	€1000	€1000	€800	€1000	€1650	€1000	€1050	€900

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	997	390	606	697	300	1200	472	728	905	295
Up to €100	*	-	*	-	1%	*	*	*	*	*
€101 to €500	16%	10%	20%	13%	24%	14%	4%	20%	12%	21%
€501 to €1000	33%	14%	46%	24%	53%	32%	15%	43%	24%	54%
€1001+	37%	63%	21%	51%	6%	46%	75%	28%	56%	15%
No deposit	13%	14%	12%	11%	17%	8%	7%	9%	7%	9%
Mean	€1073.64	€1456.48	€831.86	€1227.91	€691.22	€1239.75	€1729.66	€916.01	€1378.36	€804.30
Median	€1000	€1450	€800	€1200	€650	€1000	€1650	€800	€1250	€750

Base: All tenants	2019/20			2022/23		
	Total	Property Type		Total	Property Type	
		House	Apartment		House	Apartment
N=	997	713	268	1200	761	428
Up to €100	*	*	-	*	1%	*
€101 to €500	16%	17%	16%	14%	17%	9%
€501 to €1000	33%	37%	24%	32%	35%	25%
€1001+	37%	33%	47%	46%	38%	61%
No deposit	13%	13%	12%	8%	10%	5%
Mean	€1073.64	€1018.27	€1197.18	€1239.75	€1156.23	€1380.28
Median	€1000	€900	€1100	€1000	€908	€1300

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

Amongst those tenants that paid a deposit, in 2022/23 a total of 82% paid a deposit equal to one month's rent. This was somewhat lower than 2019/20 (88%). In 2022/23, nearly one in five (18%) paid a deposit not equal to one month's rent – highest amongst socio-demographic group AB (24%) and in Dublin (23%).

New legislation was introduced for tenancies that began on or after 9 August 2021, meaning that a landlord must not seek a deposit for a property that is more than the equivalent for one month's rent for that property.¹⁰

Total Rent Paid on the Property

All respondents were asked the total amount of rent paid on the property. Figure 3.11 sets out the total amount of rent paid on a monthly basis.

The 2022/23 survey results indicated that the average rent paid in total for the property was €1,449.09 per month. The median was €1,300. Both the average and the median rent were significantly higher in 2022/23 when compared to 2019/20.

Figure 3.11: Total amount of rent paid on the property (n=1200 (2019/20=1038) tenants)



Mean: €1,449.09 (2019/20 = €1,109.90) Median: €1,300 (2019/20 = €1,000)

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

In 2019/20 and 2022/23, the median rent paid in total for the property varied most by region, RPZ, socio-economic group, length of time renting and property type.

Table 3.22 shows that in 2022/23 the median rent paid in total for the property was €1,800 in Dublin vs €1,100 outside of Dublin and €1,500 in RPZs vs €900 outside of RPZs. Socio-demographic group AB paid a median rent of €1,750 per property, whereas tenants in the lower socio-economic groups paid less rent in total for their property.

The median rent paid in total was €1,500 for an apartment compared to €1,200 for a house. As the median rent paid was higher for an apartment, the increase in apartments to 35% in 2022/23 will have contributed to a higher median rent overall when compared to 2019/2020 (€1,000 in 2019/20 vs €1,300 in 2022/23).

10 <https://www.rtb.ie/beginning-a-tenancy/deposits#:~:text=How%20much%20is%20a%20deposit,both%20the%20landlord%20and%20tenant.>

Table 3.22: Total amount of rent paid on the property (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Social Class				Total	Social Class			
		AB	C1	C2	DE		AB	C1	C2	DE
N=	1038	125	289	276	348	1200	197	325	270	408
Up to €500	10%	5%	12%	6%	16%	2%	1%	3%	2%	3%
€501 to €1000	33%	21%	22%	37%	44%	23%	10%	20%	23%	31%
€1001 to €1100	3%	2%	4%	3%	4%	4%	1%	4%	4%	6%
€1101 to €1200	7%	2%	7%	10%	6%	8%	4%	9%	8%	8%
€1201 to €1300	4%	7%	4%	5%	2%	5%	5%	4%	6%	6%
€1301 to €1400	5%	5%	5%	7%	3%	5%	4%	6%	6%	5%
€1401 to €1500	5%	7%	7%	6%	3%	5%	8%	6%	4%	3%
€1501+	17%	35%	23%	16%	6%	31%	56%	33%	29%	19%
Don't know	15%	16%	17%	10%	16%	16%	11%	16%	18%	18%
Mean	€1109.90	€1461.72	€1228.42	€1107.06	€887.39	€1449.09	€1814.70	€1537.59	€1392.37	€1220.27
Median	€1000	€1400	€1200	€1100	€800	€1300	€1750	€1350	€1250	€1100

Base: All tenants	2019/20					2022/23				
	Total	Region/ RPZ				Total	Region/ RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	1038	407	631	732	305	1200	472	728	905	295
Up to €500	10%	7%	13%	7%	19%	2%	2%	3%	1%	5%
€501 to €1000	33%	10%	48%	22%	61%	23%	5%	34%	13%	54%
€1001 to €1100	3%	2%	4%	5%	*	4%	1%	7%	4%	5%
€1101 to €1200	7%	7%	7%	9%	1%	8%	3%	11%	7%	8%
€1201 to €1300	4%	4%	4%	6%	-	5%	4%	6%	6%	1%
€1301 to €1400	5%	5%	5%	7%	-	5%	4%	6%	7%	1%
€1401 to €1500	5%	10%	2%	7%	-	5%	5%	5%	6%	2%
€1501+	17%	34%	6%	23%	2%	31%	55%	16%	39%	6%
Don't know	15%	21%	11%	14%	17%	16%	22%	13%	16%	16%
Mean	€1109.90	€1450.78	€914.76	€1267.19	€721.63	€1449.09	€1847.06	€1221.88	€1607.83	€968.13
Median	€1000	€1500	€800	€1208	€700	€1300	€1800	€1100	€1500	€900

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

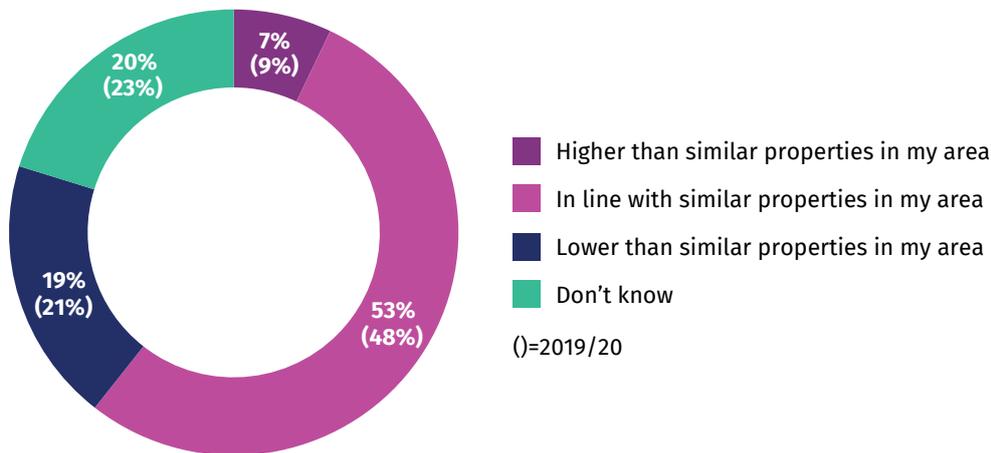
Base: All tenants	2019/20			2022/23		
	Total	Property Type		Total	Property Type	
		House	Apartment		House	Apartment
N=	1038	748	275	1200	761	428
Up to €500	10%	12%	8%	2%	4%	1%
€501 to €1000	33%	38%	22%	23%	26%	18%
€1001 to €1100	3%	4%	3%	4%	5%	3%
€1101 to €1200	7%	7%	6%	8%	9%	5%
€1201 to €1300	4%	3%	5%	5%	5%	6%
€1301 to €1400	5%	5%	5%	5%	5%	7%
€1401 to €1500	5%	4%	7%	5%	4%	7%
€1501+	17%	15%	23%	31%	26%	39%
Don't know	15%	13%	20%	16%	17%	15%
Mean	€1109.90	€1059.94	€1245.96	€1449.09	€1407.60	€1510.97
Median	€1000	€950	€1208	€1300	€1200	€1500

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.

The results in 2019/20 and 2022/23 were similar. In 2022/23, the majority (53% up from 48% in 2019/20) of tenants believed that the rent they pay is 'in line with similar properties' in their area. One in five (19%) stated that the rent they paid was 'lower' and 7% stated that the rent was 'higher than similar properties in my area'. One fifth (20%) didn't know how their rent compared to other properties in the area. Please see Figure 3.12.

Figure 3.12: How rent paid compares to similar properties in the area (n=1200 (2019/20=1038) tenants)



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

Table 3.23 indicates that in 2019/20 and 2022/23 young adults aged 19-24 and those living in Dublin were less likely to know how the rent they paid compared to similar properties in their area. In 2022/23, approximately one quarter (26%) of young adults aged 19-24 did not know how the rent they paid compared to similar properties in their area. The figure for those living in Dublin was 31%.

Table 3.23: How rent paid compares to similar properties in the area (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Age				Total	Age			
		19-24	25-34	35-44	45+		19-24	25-34	35-44	45+
N=	1038	137	443	281	176	1200	158	513	325	204
Higher than similar properties in my area	9%	6%	9%	9%	7%	7%	4%	7%	9%	7%
In line with similar properties in my area	48%	50%	46%	50%	51%	53%	55%	57%	47%	53%
Lower than similar properties in my area	21%	16%	21%	20%	23%	19%	15%	17%	23%	23%
Don't know	23%	28%	24%	20%	19%	20%	26%	18%	21%	17%

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	1038	407	631	732	305	1200	472	728	905	295
Higher than similar properties in my area	9%	10%	7%	8%	10%	7%	9%	6%	7%	8%
In line with similar properties in my area	48%	45%	50%	47%	50%	53%	46%	58%	51%	63%
Lower than similar properties in my area	21%	17%	23%	22%	17%	19%	14%	22%	19%	21%
Don't know	23%	27%	20%	23%	23%	20%	31%	13%	24%	9%

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

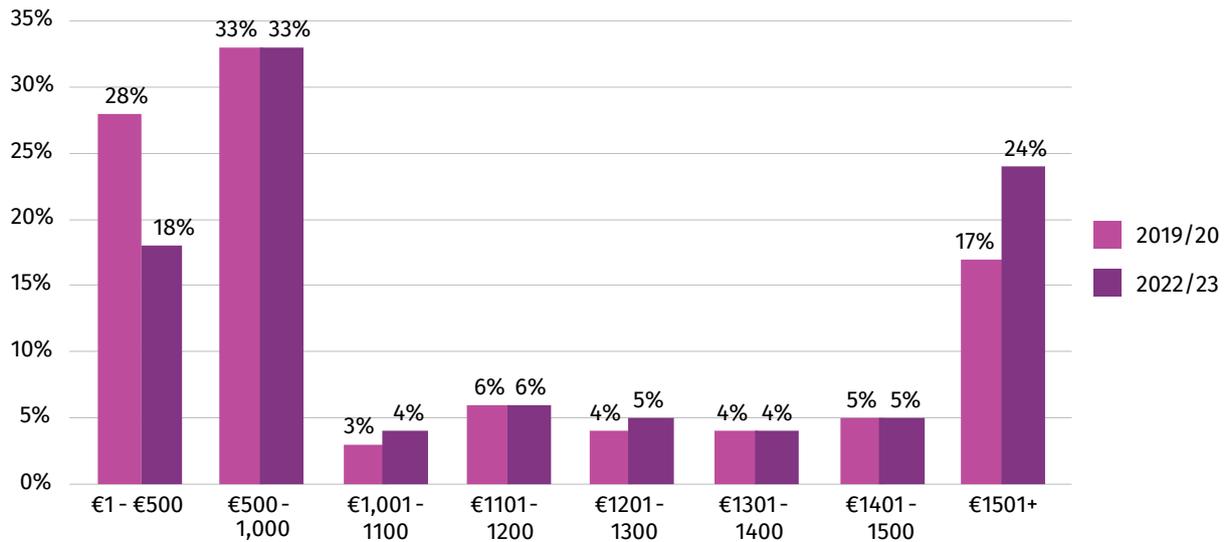
Individual Rent Paid by the Tenant

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

Figure 3.13 sets out the individual monthly rent paid by tenants for their current property.

In 2022/23, the average rent paid per month was €1,135.60. The median was €1,000. Figure 3.13 shows that both the average and the median rent were approximately 17% higher in 2022/23 when compared to 2019/20. In 2022/23, nearly one in four (24%) tenants paid more than €1,500 per month compared to 17% in 2019/20.

Figure 3.13: Monthly rent paid by tenant for current property (n=1200 (2019/20=1038) tenants)



Mean: €1135.60 (2019/20 = €967.77) Median: €1,000 (2019/20 = €850)

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

In 2019/20 and 2022/23, the median individual rent paid per month varied most by region, RPZ, socio-economic group and property type.

Table 3.24 shows that in 2022/23 the median individual rent paid was €1,600 in Dublin vs €850 outside of Dublin and €1,200 inside RPZs vs €750 outside of RPZs. Socio-demographic group AB paid a median rent of €1,500 per month, whereas tenants in the lower socio-economic groups paid less rent in total for their property.

The median individual rent paid was €1,250 for an apartment compared to €950 for a house. As the median rent paid was higher for an apartment, the increase in apartments to 35% in 2022/23 will have contributed to a higher median individual rent overall when compared to 2019/2020 (€850 in 2019/20 vs €1,000 in 2022/23).

Table 3.24: Monthly rent paid by tenant for current property (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Social Class				Total	Social Class			
		AB	C1	C2	DE		AB	C1	C2	DE
N=	1038	125	289	276	348	1200	197	325	270	408
Up to €500	28%	8%	31%	14%	43%	18%	8%	20%	14%	24%
€501 to €1000	33%	28%	26%	40%	36%	33%	23%	34%	31%	38%
€1001 to €1100	3%	2%	4%	3%	3%	4%	1%	4%	4%	6%
€1101 to €1200	6%	5%	5%	9%	4%	6%	6%	7%	8%	5%
€1201 to €1300	4%	6%	5%	6%	3%	5%	5%	5%	6%	5%
€1301 to €1400	4%	6%	3%	7%	3%	4%	3%	3%	4%	4%
€1401 to €1500	5%	8%	6%	6%	2%	5%	7%	5%	5%	3%
€1501+	17%	37%	21%	17%	6%	24%	47%	22%	26%	13%
Mean	€967.77	€1401.96	€1010.28	€1061.66	€701.86	€1135.60	€1513.49	€1083.33	€1178.96	€965.54
Median	€850	€1350	€900	€1000	€650	€1000	€1500	€1000	€1190	€900

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

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	1038	407	631	732	305	1200	472	728	905	295
Up to €500	28%	15%	37%	22%	44%	18%	7%	26%	16%	25%
€501 to €1000	33%	18%	43%	24%	55%	33%	19%	41%	24%	61%
€1001 to €1100	3%	3%	3%	4%	1%	4%	1%	7%	4%	4%
€1101 to €1200	6%	7%	5%	8%	1%	6%	3%	8%	7%	6%
€1201 to €1300	4%	4%	4%	6%	-	5%	5%	5%	7%	1%
€1301 to €1400	4%	5%	4%	6%	-	4%	3%	4%	5%	1%
€1401 to €1500	5%	10%	1%	7%	-	5%	7%	4%	6%	2%
€1501+	17%	38%	3%	24%	-	24%	54%	5%	32%	*
Mean	€967.77	€1359.78	€714.61	€1145.07	€542.63	€1135.60	€1563.11	€858.74	€1266.54	€734.02
Median	€850	€1400	€700	€1150	€600	€1000	€1600	€850	€1200	€750

Base: All tenants	2019/20			2022/23		
	Total	Property Type		Total	Property Type	
		House	Apartment		House	Apartment
N=	1038	748	275	1200	761	428
Up to €500	28%	31%	22%	18%	23%	10%
€501 to €1000	33%	37%	24%	33%	35%	29%
€1001 to €1100	3%	3%	4%	4%	5%	3%
€1101 to €1200	6%	5%	7%	6%	7%	5%
€1201 to €1300	4%	4%	5%	5%	5%	7%
€1301 to €1400	4%	3%	5%	4%	3%	5%
€1401 to €1500	5%	4%	7%	5%	3%	8%
€1501+	17%	14%	25%	24%	19%	33%
Mean	€967.77	€899.62	€1130.62	€1135.60	€1054.71	€1276.24
Median	€850	€800	€1100	€1000	€950	€1250

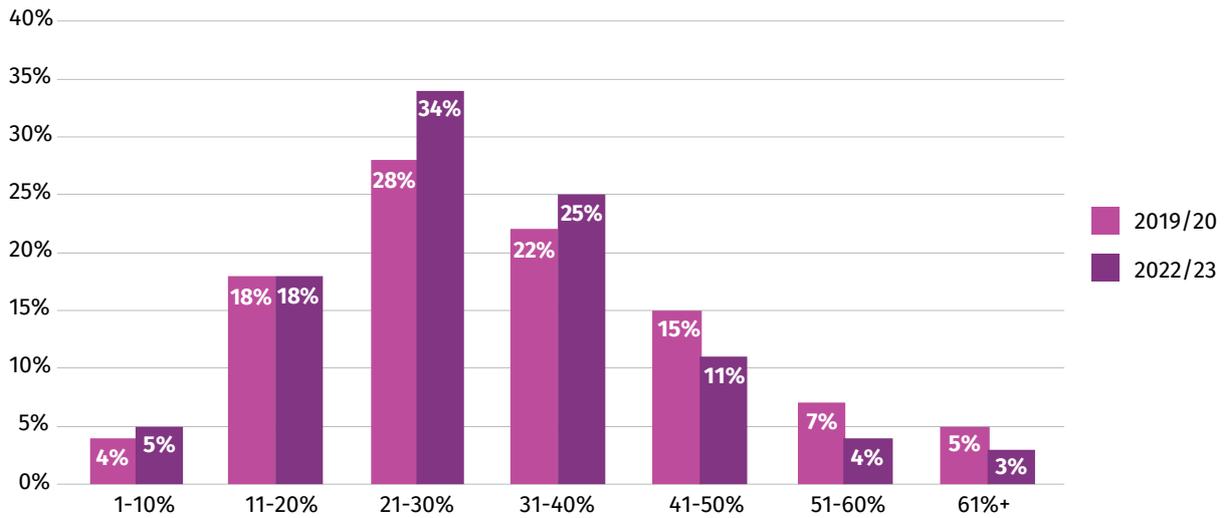
Q27 At present how much do you pay in rent for this property on a monthly basis?

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 32.44% of their monthly income on rent in the 2022/23 survey. This was slightly lower than the previous survey (35.58%) but the median was the same in both waves of research (30%). In 2022/23, more than half (57%) stated that they spent 30% or less of their monthly net income on rent. One in four (25%) tenants spent 31%-40% and 18% stated that they spent more than 40% of their monthly net income on rent. The results are set out in Figure 3.14.

Figure 3.14: Percentage of monthly net income that goes towards paying rent excluding “don’t know” (n=904 (2019/20=726) tenants)



Mean: 32.44% (2019/20 = 35.58%) Median: 30% (2019/20 = 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.)?

In 2022/23, the median spend on rent as a proportion of monthly net income was higher amongst tenants renting in Dublin (35%), those renting an apartment (33%) and tenants renting for less than 1 year (35%).

Ability to Pay Monthly Rent

In both surveys most tenants indicated that they were able to pay their monthly rent on the date it was due (94% in 2019/20 and 93% in 2022/23). Approximately one in twenty (5%) tenants stated that were unable to pay their monthly rent on the date it was due in the last 12 months since being surveyed (same in 2019/20 and 2022/23).

The results were fairly consistent across the different demographic groups. In 2022/23, tenants who were in receipt of rental assistance were somewhat more likely to have experienced difficulty paying their monthly rent on the due date (9%) as can be seen in Table 3.25.

Table 3.25: Whether ever not able to pay monthly rent on due date within the last 12 months (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20			2022/23		
	Total	Rental Assistance		Total	Rental Assistance	
		Any assistance	HAP		Any assistance	HAP
N=	1038	202	112	1200	219	180
Yes	5%	6%	7%	5%	9%	10%
No	94%	92%	90%	93%	87%	86%
Refused (Do not read out)	1%	3%	3%	2%	4%	4%

Q.31 Within the last 12 months have you ever not been able to pay your monthly rent on the date it was due?

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.

The proportion of tenants who stated that their rent was higher when surveyed than when they first moved into their current property increased from 25% in 2019/20 to 31% in 2022/23. It is interesting to note that in 2022/23 a total of 69% stated that their rent has not increased since they moved in. Amongst those renting for five years or longer, 50% stated that their rent has not increased since they moved in.

Table 3.26 shows that those renting for longer were more likely to say that their rent was higher compared to when they first moved in. For example, 5% of those renting for less than a year in 2022/23 stated that their rent was higher when surveyed than when they first moved in compared to 27% of those renting for between one and four years and 50% of those renting for five years or more.

Table 3.26: Whether rent today is higher than when first moved in (n=1200 (2019/20=1038) tenants)

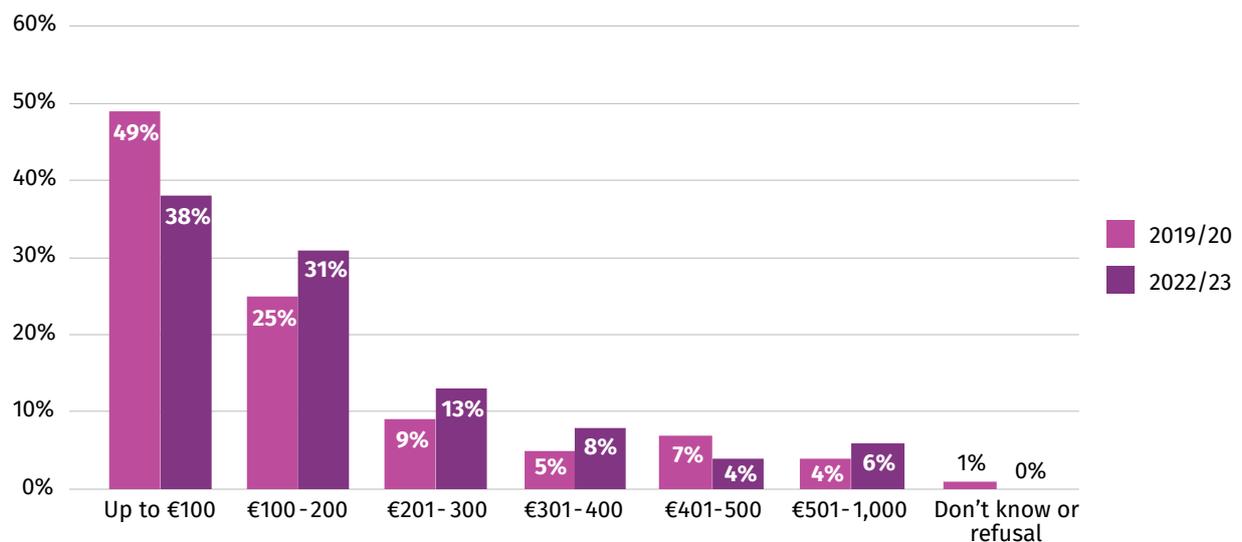
Base: All tenants	2019/20				2022/23			
	Total	Renting in Total			Total	Renting in Total		
		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs
N=	1038	197	427	414	1200	250	500	450
Yes	25%	5%	19%	40%	31%	5%	27%	50%
No	75%	95%	81%	60%	69%	95%	73%	50%

Q.33 Is your rent today higher than when you first moved into this property?

Figure 3.15 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 average rent increase was €212.61 in 2022/23. The median rent increase was €160. The median rent increase was 33% higher in 2022/23 when compared to 2019/20 (€120).

Figure 3.15: Difference in rent now vs when first moved in, excluding tenants whose rent was not higher than when first moved in (n=373 (2020=257) tenants)



Mean: €212.61 (2019/20 = €185.61) Median: €160 (2019/20 = €120)

Q.34 Roughly speaking how much higher is your rent now compared to when you first moved in?

Table 3.27 indicates that in 2022/23 the median rent increase was higher in Dublin (€200) vs outside Dublin (€150) and inside RPZs (€200) vs outside RPZs (€120). Older tenants (aged 35+) claimed a higher median rent increase (€200) than younger tenants aged 19-24 (€150) as did long term renters (5+ years). Similar differences were seen in 2019/20.

Table 3.27: Difference in rent now vs when first moved in, excluding tenants whose rent was not higher than when first moved in (n=373 (2019/20=257) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Age				Total	Age			
		19-24	25-34	35-44	45+		19-24	25-34	35-44	45+
N=	257	18*	102	84	53	373	17*	134	119	103
Up to €100	49%	58%	54%	41%	50%	38%	46%	46%	33%	34%
€101 to €200	25%	21%	26%	23%	26%	31%	21%	28%	34%	32%
€201 to €300	9%	-	9%	12%	8%	13%	14%	11%	12%	17%
€301 to €400	5%	6%	2%	7%	7%	8%	7%	9%	7%	8%
€401 to €500	7%	10%	4%	10%	7%	4%	6%	2%	6%	3%
€501 to €1000	4%	6%	3%	5%	2%	6%	7%	4%	7%	6%
Don't know or Refusal	1%	-	2%	-	-	-	-	-	-	-
Mean €	€185.61	€177.01	€159.73	€223.21	€178.16	€212.61	€193.58	€195.18	€226.11	€222.95
Median €	€120	€100	€100	€150	€150	€160	€150	€150	€200	€200

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	257	98	158	194	63	373	133	240	274	98
Up to €100	49%	32%	60%	44%	65%	38%	29%	43%	35%	49%
€101 to €200	25%	25%	25%	25%	25%	31%	26%	33%	29%	33%
€201 to €300	9%	9%	9%	11%	3%	13%	18%	10%	14%	10%
€301 to €400	5%	10%	2%	6%	2%	8%	10%	7%	9%	5%
€401 to €500	7%	15%	2%	9%	2%	4%	7%	2%	5%	1%
€501 to €1000	4%	8%	1%	4%	3%	6%	9%	4%	7%	2%
Don't know or Refusal	1%	-	1%	1%	-	-	-	-	-	-
Mean €	€185.61	€265.70	€135.14	€205.06	€126.17	€212.61	€264.15	€184.41	€233.81	€154.18
Median €	€120	€200	€100	€150	€100	€160	€200	€150	€200	€120

Q.34 Roughly speaking how much higher is your rent now compared to when you first moved in?

Base: All tenants	2019/20				2022/23			
	Total	Renting in Total			Total	Renting in Total		
		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs
N=	257	10*	79	167	373	11*	135	227
Up to €100	49%	54%	55%	46%	38%	73%	48%	32%
€101 to €200	25%	30%	26%	24%	31%	10%	36%	28%
€201 to €300	9%	-	9%	10%	13%	7%	10%	15%
€301 to €400	5%	-	3%	7%	8%	10%	5%	9%
€401 to €500	7%	10%	4%	8%	4%	-	-	6%
€501 to €1000	4%	7%	3%	4%	6%	-	1%	10%
Don't know or Refusal	1%	-	1%	1%	-	-	-	-
Mean €	€185.61	€167.84	€152.61	€202.17	€212.61	€137.18	€148.99	€254.12
Median €	€120	€100	€100	€150	€160	€100	€150	€200

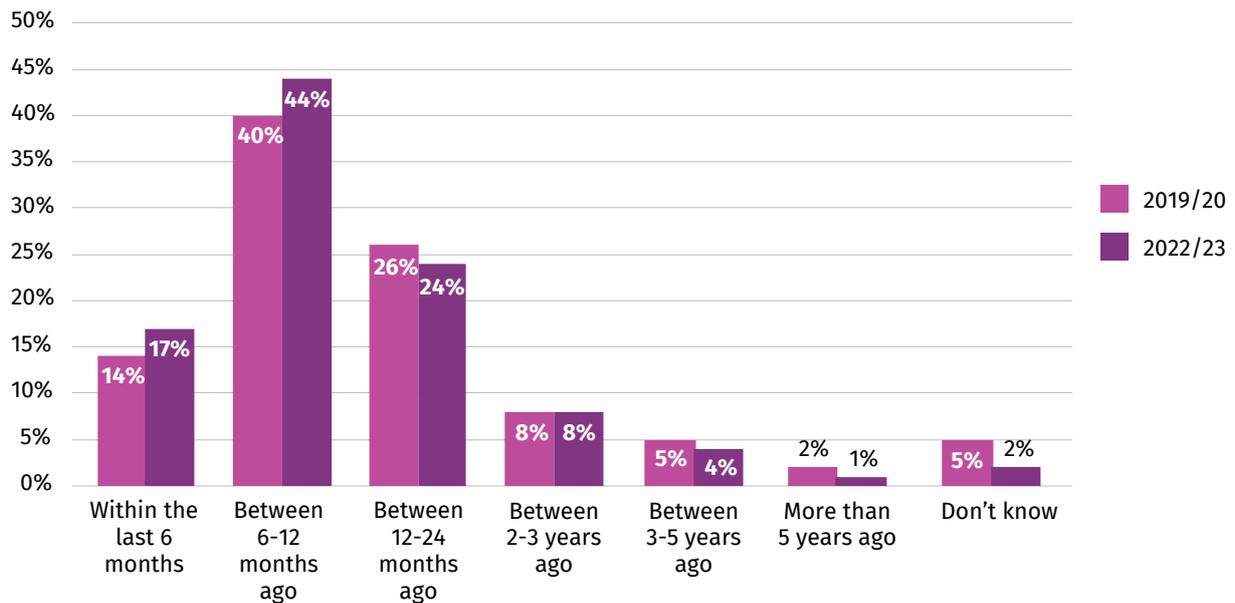
Q.34 Roughly speaking how much higher is your rent now compared to when you first moved in?

In 2022/23, the median rent increase was €170 for an apartment compared to €150 for a house. As the median rent increase was higher for an apartment, the increase in apartments to 35% in 2022/23 will have contributed to a higher median rent increase overall when compared to 2019/2020 (€120 in 2019/20 vs €160 in 2022/23).

Most Recent Rent Increase

In 2022/23 and amongst those tenants who stated that their rent was higher than when they first moved in, the majority (60%) said that their landlord increased their rent within the last 12 months of being surveyed. One in four (24%) said that their rent was increased 12-24 months before being surveyed and 13% said that their rent was increased 2+ years before being surveyed. The remainder (2%) did not know the last time the landlord increased their rent. These results were very similar to 2019/20 as can be seen in Figure 3.16.

Figure 3.16: Recency of last rent increase, excluding tenants whose rent was not higher than when first moved in (n=373 (2019/20=257) tenants)



Q.35a When was the last time your landlord increased your rent?

Table 3.28 shows that those who were most likely to have had their rent increased within the last 12 months were aged 25-34 (73%), socio-demographic group AB (66%) or C1 (73%), renting outside RPZs (67%) and renting for 1-4 years in total (78%). The 2019/20 results were similar.

Table 3.28: Recency of last rent increase, excluding tenants whose rent was not higher than when first moved in (n=373 (2019/20=257) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Age				Total	Age			
		19-24	25-34	35-44	45+		19-24	25-34	35-44	45+
N=	257	18*	102	84	53	373	17*	134	119	103
Within the last 6 months	14%	22%	14%	18%	2%	17%	20%	26%	14%	8%
Between 6-12 months ago	40%	23%	49%	32%	40%	44%	46%	47%	46%	39%
Between 12-24 months ago	26%	38%	22%	22%	38%	24%	34%	21%	22%	28%
Between 2-3 years ago	8%	5%	7%	10%	8%	8%	-	3%	9%	16%
Between 3-5 years ago	5%	-	1%	9%	11%	4%	-	2%	6%	5%
More than 5 years ago	2%	-	2%	3%	1%	1%	-	-	-	2%
Don't know	5%	12%	5%	6%	-	2%	-	1%	3%	2%

Base: All tenants	2019/20					2022/23				
	Total	Social Class				Total	Social Class			
		AB	C1	C2	DE		AB	C1	C2	DE
N=	257	34*	53	72	98	373	50	81	106	136
Within the last 6 months	14%	17%	16%	15%	10%	17%	17%	25%	15%	14%
Between 6-12 months ago	40%	44%	52%	35%	35%	44%	49%	48%	44%	42%
Between 12-24 months ago	26%	17%	20%	26%	33%	24%	22%	17%	28%	25%
Between 2-3 years ago	8%	7%	5%	11%	8%	8%	8%	6%	8%	11%
Between 3-5 years ago	5%	6%	1%	7%	6%	4%	3%	5%	3%	4%
More than 5 years ago	2%	-	-	1%	4%	1%	-	-	-	2%
Don't know	5%	9%	6%	4%	3%	2%	-	-	3%	3%

Base: All tenants	2019/20				2022/23			
	Total	Renting in Total			Total	Renting in Total		
		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs
N=	257	10*	79	167	373	11*	135	227
Within the last 6 months	14%	32%	18%	10%	17%	55%	18%	14%
Between 6-12 months ago	40%	50%	47%	36%	44%	29%	60%	36%
Between 12-24 months ago	26%	-	28%	27%	24%	15%	19%	27%
Between 2-3 years ago	8%	-	3%	11%	8%	-	1%	13%
Between 3-5 years ago	5%	-	-	8%	4%	-	-	7%
More than 5 years ago	2%	-	-	3%	1%	-	-	1%
Don't know	5%	18%	5%	4%	2%	-	1%	2%

Q.35a 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 average rent increase at the most recent rent review was €118.10 in 2022/23 up from €105.73 in 2019/20. The median rent increase was €100 in 2022/23 up from €70 in 2019/20. The details are illustrated in Figure 3.17.

Figure 3.17: Rent increase at most recent rent review, excluding tenants whose rent was not higher than when first moved in (n=373 (2019/20=243) tenants)



Mean: €118.10 (2019/20 = €105.73) Median: €100 (2019/20 = €70)

Q.35b At your most recent rent review how much did your rent increase by?

Table 3.29 indicates that the median rent increase at the most recent rent review was highest in Dublin (€150 vs €75 outside of Dublin). The 2019/20 survey showed a similar result.

Table 3.29: Rent increase at most recent rent review, excluding tenants whose rent was not higher than when first moved in (n=373 (2019/20=243) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	243	89	154	182	62	373	133	240	274	98
€1 to 50	45%	27%	56%	40%	60%	35%	26%	40%	34%	38%
€51 to 100	32%	29%	33%	33%	29%	35%	22%	42%	34%	38%
€101 to 500	21%	39%	11%	25%	11%	29%	50%	18%	31%	24%
€501+	2%	5%	-	2%	-	1%	2%	-	1%	-
Mean	€105.73	€165.15	€71.27	€120.45	€62.75	€118.10	€167.37	€90.76	€124.73	€99.59
Median	€70	€100	€50	€80	€50	€100	€150	€75	€100	€75

Q.35b At your most recent rent review how much did your rent increase by?

Rent Pressure Zones

A Rent Pressure Zone (RPZ) is a designated area where rents cannot be increased by more than general inflation or 2% per annum, whichever is lower. Prior to December 2021 rents could not be increased by more than 4% per annum in an RPZ. RPZs 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 an RPZ.

Awareness of RPZs was higher overall in 2022/23 when compared to 2019/20. In 2022/23, a total of 44% stated that they know what an RPZ is. The figure for 2019/20 was 37%. However, in both surveys the majority of tenants were not aware what an RPZ is as can be seen in Table 3.30.

Amongst those renting inside RPZs in 2022/23, awareness of RPZs was higher (49% vs 29% outside RPZs).

In 2022/23 awareness of RPZs was highest amongst socio-economic group AB (62%), in Dublin (56%) and amongst 35-44 year olds (52%).

Table 3.30: Awareness of Rent Pressure Zones (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Age				Total	Age			
		19-24	25-34	35-44	45+		19-24	25-34	35-44	45+
N=	1038	137	443	281	176	1200	158	513	325	204
Yes	37%	25%	37%	41%	37%	44%	27%	45%	52%	41%
No	63%	75%	63%	59%	63%	56%	73%	55%	48%	59%

Base: All tenants	2019/20					2022/23				
	Total	Social Class				Total	Social Class			
		AB	C1	C2	DE		AB	C1	C2	DE
N=	1038	125	289	276	348	1200	197	325	270	408
Yes	37%	52%	41%	40%	25%	44%	62%	48%	45%	32%
No	63%	48%	59%	60%	75%	56%	38%	52%	55%	68%

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	1038	407	631	732	305	1200	472	728	905	295
Yes	37%	40%	35%	41%	26%	44%	56%	36%	49%	29%
No	63%	60%	65%	59%	74%	56%	44%	64%	51%	71%

Q.62 Do you know what a Rent Pressure Zone is?

When asked if their rental property was located within an RPZ, 28% of tenants in the 2022/23 survey answered 'yes' (down from 34% in 2019/20), 25% answered 'no' (down from 37% in 2019/20) and 47% stated that they 'don't know' (up from 29% in 2019/20).

Amongst those renting inside RPZs, 33% of tenants in 2022/23 answered 'yes' (down from 42% in 2019/20), 24% answered 'no' (down from 35% in 2019/20) and 43% didn't know (up from 23% in 2019/20).

A small proportion of tenants stated that their property is located inside an RPZ when they are currently renting outside of an RPZ (16% in 2019/20 and 13% in 2022/23).

Please see Table 3.31 for details.

Table 3.31: Whether property is located in a Rent Pressure Zone (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	1038	407	631	732	305	1200	472	728	905	295
Yes	34%	49%	24%	42%	16%	28%	42%	20%	33%	13%
No	37%	34%	39%	35%	42%	25%	24%	25%	24%	29%
Don't know	29%	17%	36%	23%	42%	47%	34%	55%	43%	59%

Q63 To the best of your knowledge, is your property located within a Rent Pressure Zone?

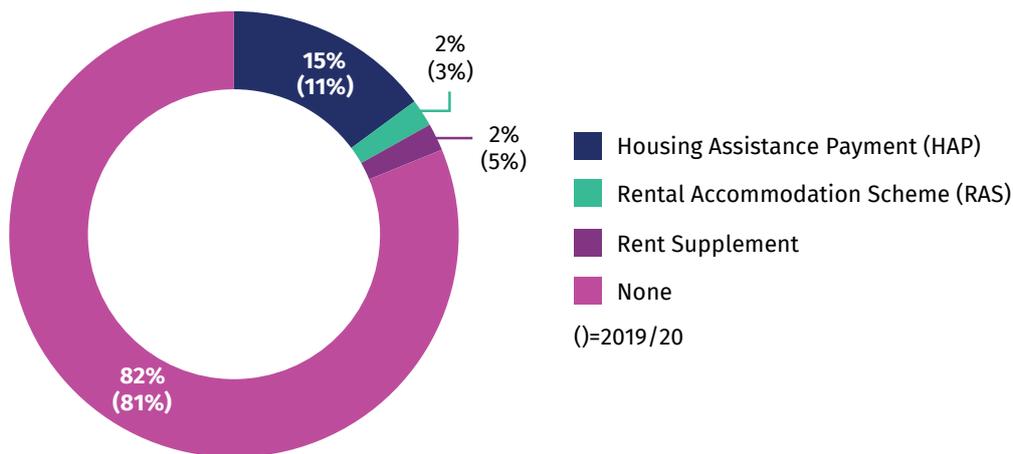
Rental Assistance

Tenants were asked whether they were in receipt of any rental assistance. In 2019/20, the survey results indicated that 19% of all tenants were in receipt of some form of rental assistance. Other data available estimated the proportion of all registered tenancies in receipt of rental assistance at c.30%.¹¹ Therefore, in 2022/23, the survey aimed to increase the proportion of tenants on rental assistance to bring it more in line with current estimates. The proportion of tenants on rental assistance was closely monitored throughout fieldwork. Weekly field updates were provided and reminders were sent to all field personnel.

During the second half of fieldwork some of the remaining sampling points were replaced with areas where there was likely to be a higher incidence of HAP. However, despite these efforts the rental assistance cohort proved to be very difficult to reach and a similar result to that of the previous survey was achieved.

In 2022/23, the proportion of tenants who stated that were in receipt of some form of rental assistance was 18% in total, almost on par with 2019/20. Tenants receiving the Housing Assistance Payment (HAP) represented the greatest share (15% up from 11% in 2019/20), followed by the Rental Accommodation Scheme at 2% (3% in 2019/20) and Rent Supplement at 2% (down from 5% in 2019/20). Please see Figure 3.18.

Figure 3.18: Whether in receipt of any forms of rental assistance? (n=1200 (2019/20=1038) tenants)



Q.21 Are you in receipt of any of the following rental assistances?

11 (https://www.esri.ie/system/files/publications/RS141_1.pdf)
 Housing Schemes – Tuesday, 5 Apr 2022 – Parliamentary Questions (33rd Dáil) – Houses of the Oireachtas
 Table H8 <https://www.gov.ie/en/publication/802ec-2020-annual-statistics-report/>

In 2022/23 and amongst those tenants belonging to socio-economic group DE, 32% stated that they were in receipt of the HAP payment (up from 24% in 2019/20). Older tenants age 45+ and those renting 5+ years were also more likely to be in receipt of rental assistance as can be seen in Table 3.32.

Table 3.32: Whether in receipt of any rental assistances? (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Age				Total	Age			
		19-24	25-34	35-44	45+		19-24	25-34	35-44	45+
N=	1038	137	443	281	176	1200	158	513	325	204
Housing Assistance Payment (HAP)	11%	9%	9%	14%	11%	15%	14%	12%	18%	20%
Rental Accommodation Scheme (RAS)	3%	-	3%	4%	4%	2%	-	1%	2%	5%
Rent Supplement	5%	3%	5%	4%	11%	2%	1%	1%	1%	3%
None	81%	88%	83%	78%	74%	82%	84%	87%	80%	71%

Base: All tenants	2019/20					2022/23				
	Total	Social Class				Total	Social Class			
		AB	C1	C2	DE		AB	C1	C2	DE
N=	1038	125	289	276	348	1200	197	325	270	408
Housing Assistance Payment (HAP)	11%	7%	3%	5%	24%	15%	2%	7%	8%	32%
Rental Accommodation Scheme (RAS)	3%	1%	1%	1%	8%	2%	-	1%	1%	3%
Rent Supplement	5%	-	1%	3%	13%	2%	-	1%	1%	3%
None	81%	93%	95%	92%	55%	82%	98%	91%	90%	62%

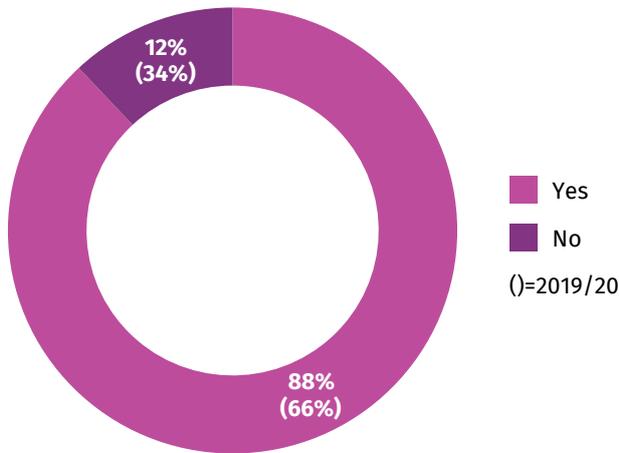
Base: All tenants	2019/20				2022/23			
	Total	Renting in Total			Total	Renting in Total		
		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs
N=	1038	197	427	414	1200	250	500	450
Housing Assistance Payment (HAP)	11%	5%	10%	14%	15%	8%	14%	20%
Rental Accommodation Scheme (RAS)	3%	1%	2%	5%	2%	*	1%	3%
Rent Supplement	5%	4%	3%	8%	2%	*	2%	2%
None	81%	90%	85%	72%	82%	92%	83%	75%

Q.21 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.

Figure 3.19 shows that amongst those tenants in receipt of rental assistance, 88% of those surveyed in 2022/23 stated that they pay a top-up payment to their landlord. This is significantly higher than the 2019/20 result (66%).

Figure 3.19: 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=219 (2019/20=202) tenants)



Q.23 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 3.20 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.

In 2022/23, the average amount paid as a top-up was €284.38. The median was €230 compared to €200 in 2019/20 (representing a 15% increase). Nearly one in four (23%) tenants paid up to €100 as a top-up and a similar proportion (25%) paid €101-€200. Those who paid between €201-€400 accounted for 32% and 19% paid more than €400.

Figure 3.20: Amount paid as a top-up (n=192 (2019/20=132) tenants)



Mean: €284.38 (2019/20 = €255.88) Median: €230 (2019/20 = €200)

Q24 And how much do you pay as a top-up?

Table 3.33 shows that in 2022/23 tenants renting in Dublin paid a higher median top-up (€300) compared to those living outside Dublin (€200). Similarly, tenants renting inside an RPZ paid a higher median top-up (€250) compared to those renting outside an RPZ (€124).

Table 3.33: Amount paid as a top-up (n=192 (2019/20=132) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	132	24*	108	69	63	192	67	125	139	52
€1 to €50	12%	3%	14%	14%	10%	8%	-	12%	4%	18%
€51 to €100	14%	1%	17%	5%	25%	15%	7%	19%	11%	25%
€101 to €200	27%	15%	30%	24%	32%	25%	25%	25%	24%	28%
€201 to €300	17%	20%	17%	22%	12%	18%	18%	18%	20%	13%
€301 to €400	13%	19%	12%	11%	15%	14%	13%	14%	17%	4%
€401 to €500	4%	4%	4%	6%	2%	6%	9%	4%	5%	8%
€501+	9%	30%	4%	14%	3%	13%	26%	6%	17%	4%
Don't know	3%	8%	2%	4%	1%	1%	1%	1%	2%	-
Mean	€255.88	€503.62	€203.12	€316.12	€191.87	€284.38	€397.06	€224.20	€324.61	€179.53
Median	€200	€400	€150	€250	€150	€230	€300	€200	€250	€124

Q24 And how much do you pay as a top-up?

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 3.21.

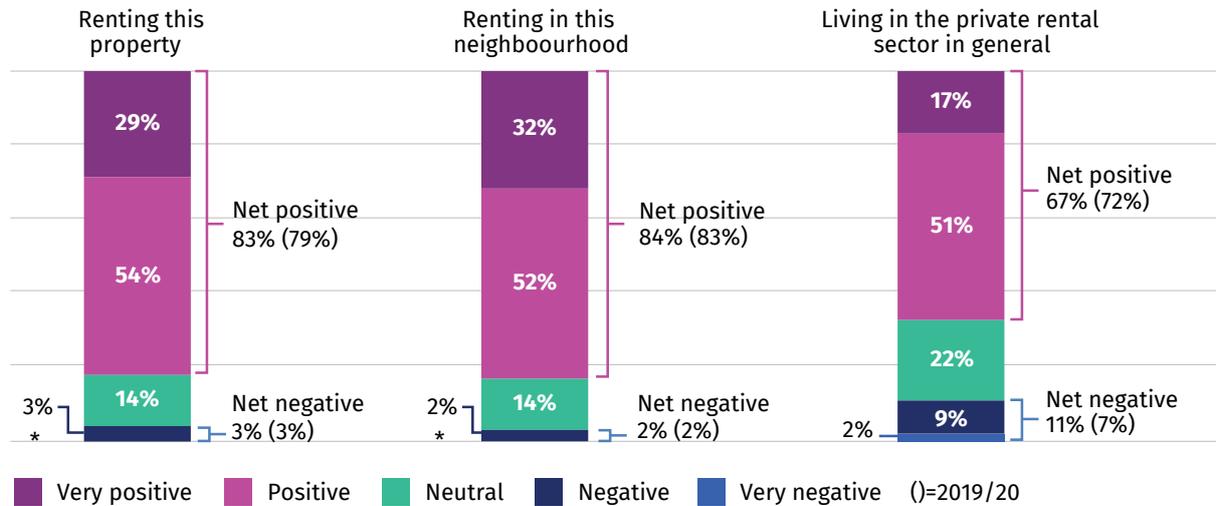
Overall, the tenant’s experience of renting and living in the private rental sector remained positive in 2022/23. A total of 83% were ‘positive/very positive’ about renting their current property (79% in 2019/20), 14% were ‘neutral’ and 3% were ‘negative/very negative’ (on par with 2019/20).

The results were similar when tenants were asked about their experience of renting in this neighbourhood. A total of 84% were ‘positive/very positive’ (83% in 2019/20), 14% were ‘neutral’ and 2% were ‘negative/very negative’ (on par with 2019/20).

However, as was the case in 2019/20, tenants were slightly less positive about their experience of living in the private rental sector in general. A total of 67% were ‘positive/very positive’ (down from 72% in 2019/20), 22% were ‘neutral’ and 11% were ‘negative/very negative’ (up from 7% in 2019/20).

In both surveys the majority of tenants rated their experience ‘positive’ rather than ‘very positive’ indicating that the rental experience could be improved.

Figure 3.21: Rating of overall experience of renting this property, renting in this neighbourhood and living in the private rental sector in general (n=1200 (2019/20=1038) tenants)



- Q.70.1 Experience of a. renting this property
- Q.70.2 Experience of b. renting in this neighbourhood
- Q.70.3 Experience of c. living in the private rental sector in general

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

Whereas in 2019/20 the experience of tenants renting inside Dublin was more or less on par with that of tenants renting outside Dublin, in 2022/23 the experience of tenants renting inside Dublin appeared to be less positive, not only with their current property and neighbourhood but with renting in the private rental sector in general.

Table 3.34: Rating of overall experience of renting this property, renting in this neighbourhood and living in the private rental sector in general (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	1038	407	631	732	305	1200	472	728	905	295
Very positive (5.00)	22%	22%	22%	23%	19%	29%	16%	37%	26%	37%
Positive (4.00)	57%	58%	56%	57%	56%	54%	56%	53%	54%	54%
Neutral (3.00)	18%	18%	18%	17%	20%	14%	23%	8%	16%	7%
Negative (2.00)	2%	1%	3%	2%	3%	3%	4%	2%	3%	2%
Very negative (1.00)	1%	1%	1%	1%	1%	*	1%	*	1%	-
Summary										
Positive	79%	80%	78%	80%	76%	83%	72%	90%	80%	90%
Negative	3%	2%	4%	3%	4%	3%	5%	2%	4%	2%
Mean	3.96	3.98	3.95	3.99	3.90	4.08	3.83	4.24	4.02	4.25

Q.70.1 Experience of a. renting this property

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	1038	407	631	732	305	1200	472	728	905	295
Very positive (5.00)	26%	25%	26%	28%	20%	32%	23%	38%	31%	37%
Positive (4.00)	58%	58%	57%	56%	60%	52%	50%	53%	51%	55%
Neutral (3.00)	15%	15%	15%	15%	16%	14%	23%	7%	16%	7%
Negative (2.00)	2%	1%	2%	1%	3%	2%	3%	1%	2%	1%
Very negative (1.00)	*	*	*	*	*	*	*	*	*	-
Summary										
Positive	83%	83%	83%	84%	81%	84%	74%	91%	82%	92%
Negative	2%	1%	2%	1%	3%	2%	3%	1%	3%	1%
Mean	4.06	4.06	4.06	4.10	3.97	4.14	3.93	4.27	4.09	4.28

Q.70.2 Experience of b. renting in this neighbourhood

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	1038	407	631	732	305	1200	472	728	905	295
Very positive (5.00)	18%	16%	19%	18%	17%	17%	14%	19%	17%	16%
Positive (4.00)	54%	58%	51%	55%	52%	51%	48%	52%	51%	49%
Neutral (3.00)	20%	19%	21%	20%	21%	22%	30%	16%	23%	16%
Negative (2.00)	6%	4%	8%	5%	9%	9%	7%	10%	7%	15%
Very negative (1.00)	1%	2%	1%	2%	*	2%	1%	3%	1%	4%
Summary										
Positive	72%	74%	70%	73%	70%	67%	62%	71%	68%	65%
Negative	8%	7%	8%	7%	9%	11%	8%	13%	8%	19%
Mean	3.81	3.81	3.80	3.82	3.77	3.71	3.67	3.74	3.75	3.59

Q.70.3 Experience of c. living in the private rental sector in general

3.3 Motivations for Renting and Future Intentions

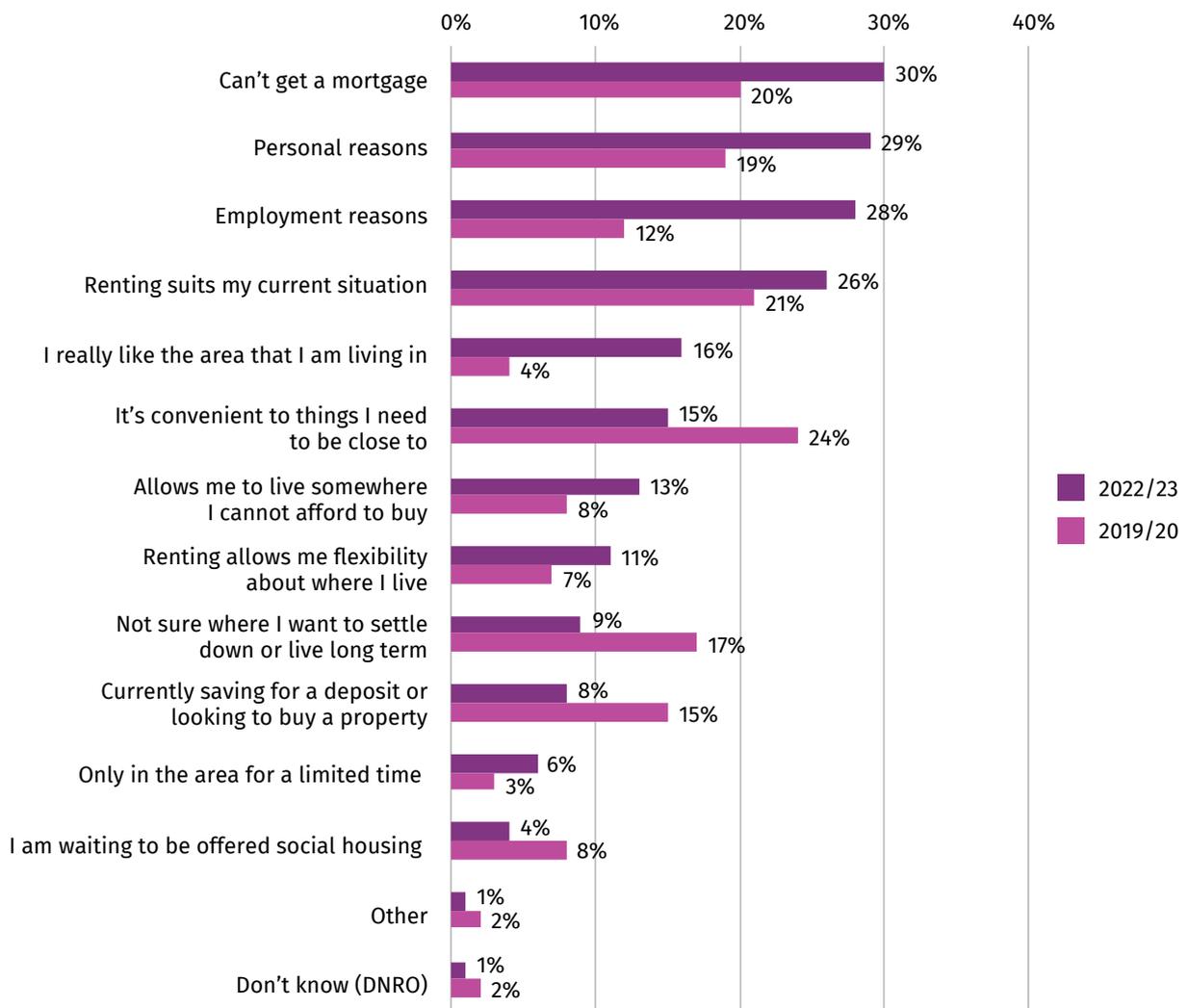
This section of the survey asked questions about motivations for renting and where respondents see themselves living in the future. It also asked about actions taken towards purchasing a property and the importance of transport services when choosing the current property to rent.

Motivations for Renting

Respondents were prompted with a list of reasons for currently renting and asked to choose which reason(s) apply. The results are set out in Figure 3.22.

Whereas convenience was the main reason given by tenants in 2019/20 (with 24% saying ‘it’s convenient to things I need to be close to (e.g. work, college, schools)’), the main reason given in 2022/23 was ‘can’t get a mortgage’ (30%) closely followed by ‘personal reasons’ (29%) and ‘employment reasons’ (28%). Flexibility was also a key factor in 2022/23 with 26% saying ‘renting suits my current situation’ and 11% saying that ‘renting allows me flexibility about where I live’. The area they were renting in was also an important factor – 13% were renting because it ‘allows me to live somewhere I cannot afford to buy’ (vs 8% in 2019/20) and 16% said ‘I really like the area that I am living in’ (vs 4% in 2019/20).

Figure 3.22: Reasons for currently renting (n=1200 (2019/20=1038) tenants)



Q39 Please tell me the reasons you are currently renting?

The reasons given for currently renting varied most by age, socio-demographic group, region and length of time renting and may be summarised as follows:

'Can't get a mortgage' was the main reason given in 2022/23 by tenants aged 35-44 (36%), DEs (37%), non-Irish citizens (35%), those living outside Dublin (35%) or outside RPZs (42%) and those renting for five years or more (41%).

Older tenants aged cited 'personal reasons' as the main reason for renting (39%).

'Employment reasons' were the main reason given by tenants aged 25-34 (31%), ABC1s (32%) and tenants renting in Dublin (30%).

Convenience was a key driver for those aged 19-24 – 34% of tenants in this age cohort stated that 'renting suits my current situation' and 26% stated 'it's convenient to things I need to be close to'.

Future Intentions

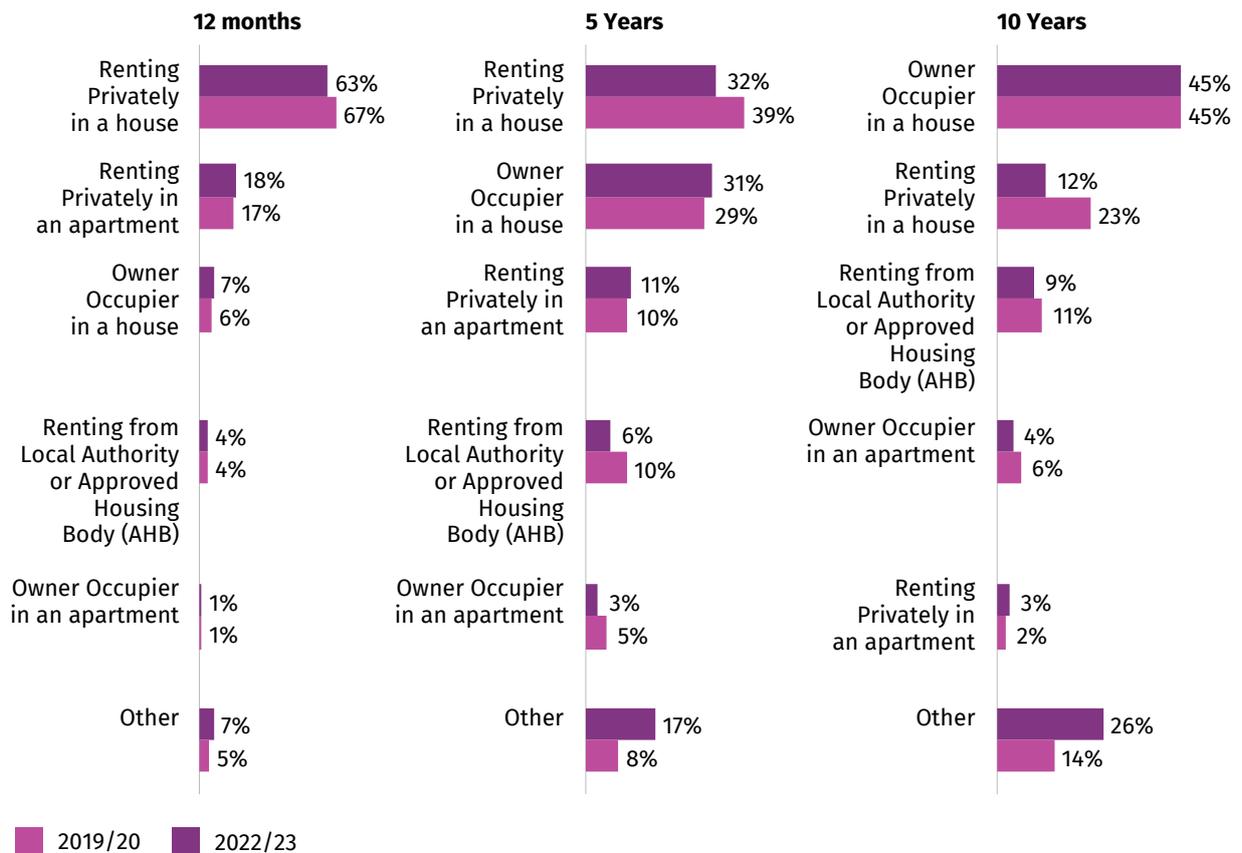
In this section respondents were asked where they saw themselves living in the future. The results are set out in Figure 3.23 below.

In 12 months' time, 81% of tenants saw themselves renting privately in either a house (63%) or an apartment (18%). The figure for 2019/20 was slightly higher (84%). A total of 9% thought they would become an owner occupier (house/apartment) during this period (7% in 2019/20) and 4% saw themselves renting from Local Authority or Approved Housing Body (AHB) (on par with 2019/20). A small proportion (7%) had an 'other' response at this question (in 2019/20).

In five years' time, 44% saw themselves renting privately in either a house (32%) or an apartment (11%), down from 49% in 2019/20. Approximately one third (34%) thought they would become an owner occupier (house/apartment) during this period (on par with 2019/20). The proportion who saw themselves renting from Local Authority or AHB was 6%, down from 10% in 2019/20. However, the proportion who mentioned 'other' increased from 8% in 2019/20 to 17% in 2022/23. These 'other' responses were not recorded during the survey but anecdotal feedback from interviewers indicated that some tenants don't know where they see themselves living in five years' time. They are uncertain about the future. Others can't see that they will ever get loan approval for a mortgage and are considering emigration or returning to the family home.

In 10 years' time, 16% saw themselves renting privately in either a house or an apartment, down from 25% in 2019/20. Nearly half (49%) of all tenants thought they would become an owner occupier (house/apartment) during this period (more or less on par with 2019/20). The proportion who saw themselves renting from Local Authority or AHB was 9% (11% in 2019/20). Once again, the proportion who mentioned 'other' increased from 14% in 2019/20 to 26% in 2022/23. The 'other' responses were the same as those outlined above – either tenants don't know where they see themselves living in ten years' time or they are considering emigration or returning to the family home.

Figure 3.23: Where tenants see themselves living (n=1200 (2019/20=997) tenants)



Q.40a1 Where do you see yourself living in....12 months
 Q.40a2 Where do you see yourself living in....5 years
 Q.40a3 Where do you see yourself living in....10 years

Where tenants see themselves living in the future varied most by age and socio-economic group. In 2022/23, tenants aged 25-34 and socio-demographic group AB were most likely to see themselves as owner occupiers in five years' time, whereas those aged 45+ and socio-demographic groups C2 and DE were most likely to see themselves renting privately.

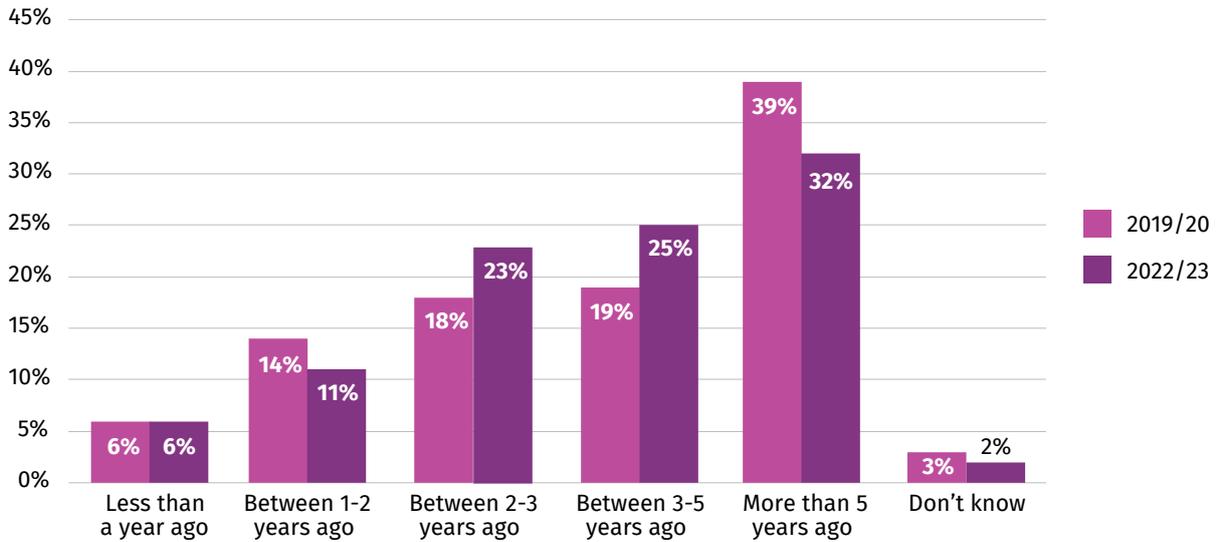
Most demographic groups were more likely to see themselves as owner occupiers than private renters within ten years' time, with the exception of those aged 45+ who were more likely to see themselves still renting.

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.

In 2022/23, a total of 83% said they were currently on a waiting or transfer list. This is more or less on par with 2019/20 (80%).

Figure 3.24 shows that amongst those tenants currently on a waiting or transfer list for Local Authority or Approved Housing Body accommodation, the majority applied more than three years ago (57% in 2022/23 and 58% in 2019/20). Approximately four in ten first applied up to three years ago (40% in 2022/23 and 38% in 2019/20).

Figure 3.24: Recency of first applying for social housing excluding tenants not currently on a waiting or transfer list (n=93 (2019/20=95) tenants)

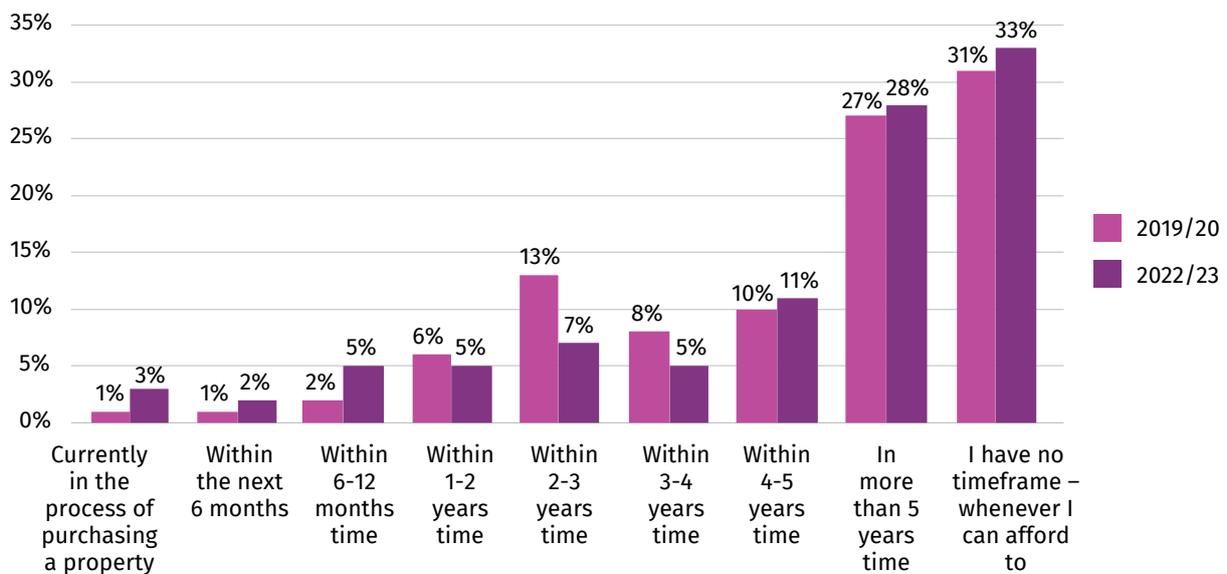


Q40b When did you first apply for social housing?

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 3.25.

A growing minority (10% in 2022/23 up from 4% in 2019/20) believed that they would purchase a property within 12 months' time¹². Those who believed that they would purchase a property within 5 years' time accounted for 38% (42% in 2019/20) and two-thirds (66% in 2022/23 and 69% in 2019/20) believed that they would purchase a property within 10 years' time. One third (33% in 2022/23 and 31% in 2019/20) had no timeframe on purchasing a property, rather it was 'whenever I can afford to'.

Figure 3.25: When will purchase a property excluding tenants who did not see themselves as owner occupier in 12 months/5 yrs/10 yrs (n=616 (2019/20=507) tenants)



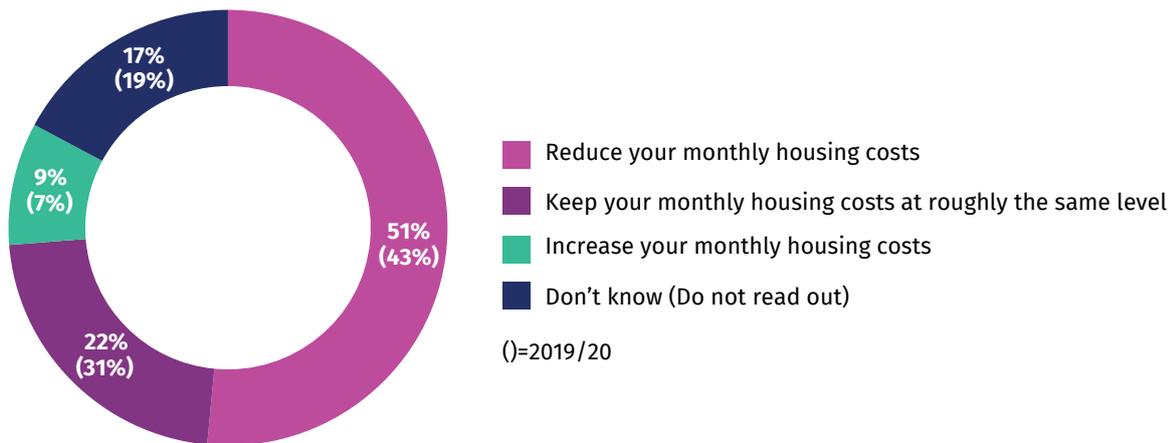
Q40c When do you believe you will purchase a property?

¹² Includes those currently in the process of purchasing a property.

If they were to buy, the majority of these tenants (51% up from 43% in 2019/20) stated that they would be looking to reduce their monthly housing costs by becoming an owner occupier.

Approximately one fifth (22% down from 31% in 2019/20) stated that they would be looking to keep their monthly housing costs at roughly the same level and 9% felt that becoming an owner occupier would increase their monthly housing costs (7% in 2019/20). A sizeable proportion of tenants did not know what impact becoming an owner occupier would have on monthly housing costs (17% in 2022/23 and 19% in 2019/20). Please see Figure 3.26 for details.

Figure 3.26: 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=616 (2019/20=507) tenants)



Q.41a If you were to buy would you be looking to...

In 2022/23, those who were most likely to be looking to reduce monthly housing costs were non-Irish citizens (59%), socio-economic group AB (58%), those renting an apartment (59%) and tenants currently spending more than 30% of their monthly net income on rent (62%).

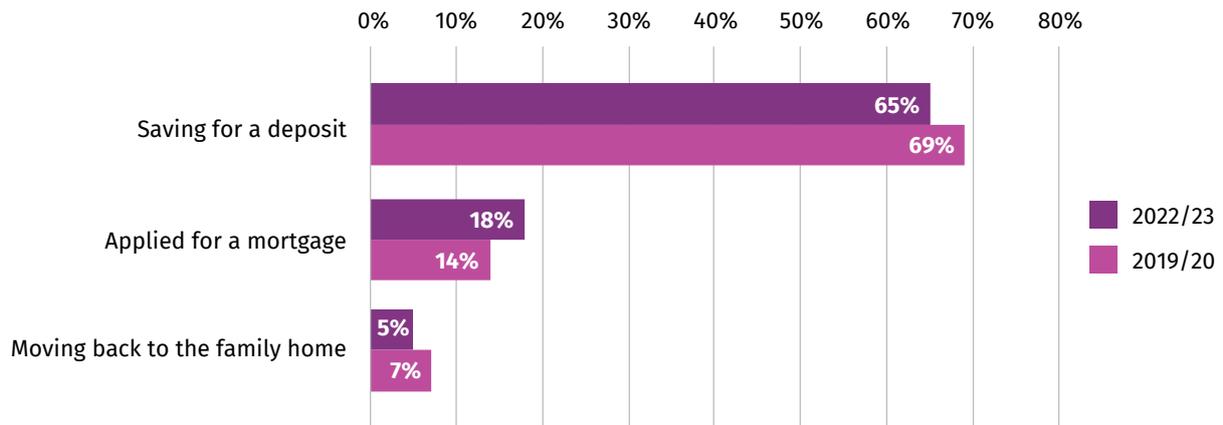
Those who were most likely to be looking to increase their monthly housing costs were tenants renting for less than one year (15%) and currently spending up to 30% of their monthly net income on rent (15%).

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' time were asked what actions they were taking to help achieve their goal to buy a property.

In 2022/23, two-thirds of tenants indicated that they were currently saving for a deposit (65% vs 69% in 2019/20). Nearly one in five (18%) indicated that they have applied for a mortgage (up from 14% in 2019/20) and a small minority (5%) stated that they were moving back to the family home (7% in 2019/20).

Figure 3.27: 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=616 (2019/20=507) tenants)



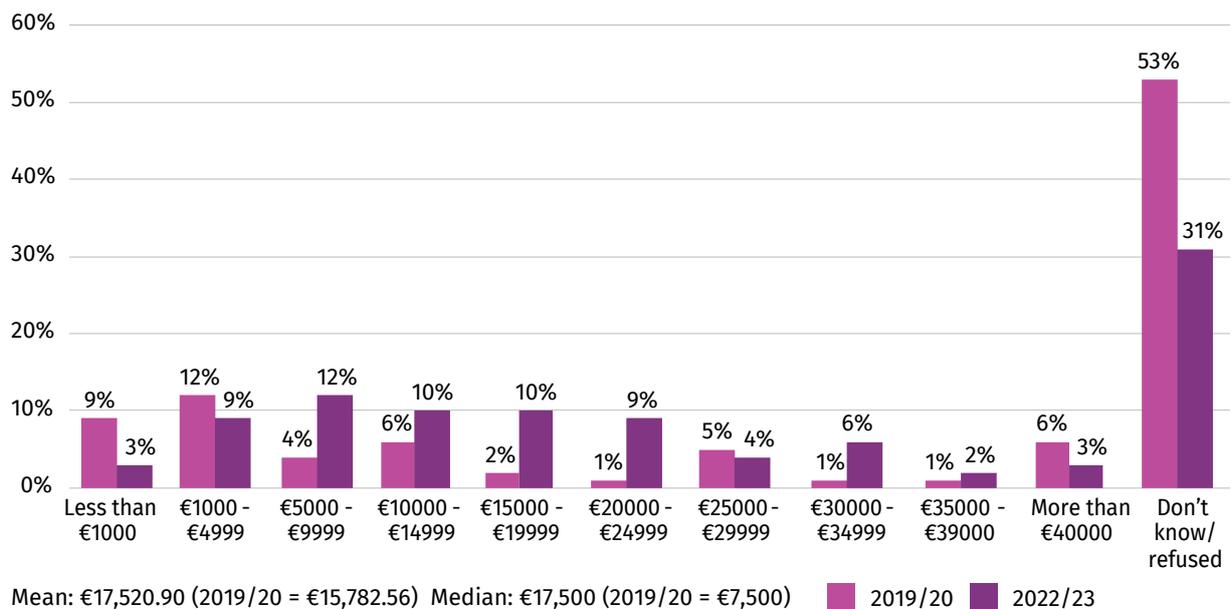
Q.41 Please indicate if you are currently doing the following to help achieve your goal to buy a property?

In 2022/23, those who were most likely to be saving for a deposit were ABs (70%), C1s (72%) and tenants renting for five years or longer (70%). The latter group were also most likely to have applied for a mortgage (25%).

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 summarised in Figure 3.28.

In 2022/23, the average amount saved so far was € 7,520.90. The median amount saved was €17,500, however, nearly a third (31%) declined to say how much they had saved. In 2019/20, the average amount saved was lower (€15,782.56) as was the median (€7,500). More than half (53%) of those who were saving for a deposit in 2019/20 refused to say how much they had saved.

Figure 3.28: Amount saved so far excluding tenants who were not currently saving for a deposit (n=311 (2019/20=349) tenants)



Q.41c Can you give us an indication as to how much you have saved so far?

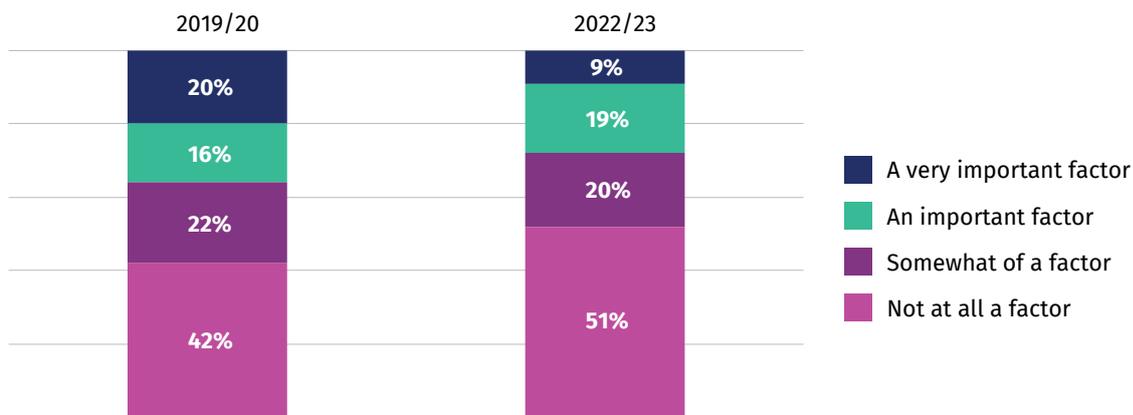
Amongst those who indicated that they were currently applying for a mortgage, 57% stated that they already had mortgage approval. This compares to just 18% in the 2019/20 survey.

Importance of Transport Services

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 3.29.

When compared to the 2019/20 result, public transport was considered slightly less important in the 2022/23 survey. Approximately one in ten (9%) considered public transport ‘a very important factor’ compared to 20% in 2019/20. A total of 28% considered public transport ‘a very important/important factor’ vs 36% in 2019/20. One fifth (20%) considered it ‘somewhat of a factor’ (vs 22% in 2019/20), but the majority of tenants (51%) were of the opinion that public transport services were ‘not at all a factor’ when choosing their current property to rent (vs 42% in 2019/20).

Figure 3.29: Rating of importance of public transport services when choosing current property to rent (n=1200 (2019/20=1038) tenants)



Q.38 How much of a factor were public transport services when choosing this property to rent?

In 2022/23, those who were most likely to rate public transport as ‘an important very important factor’ were 19-24 year olds (34%), those renting in Dublin (46%), inside RPZs (35%), renting an apartment (44%), and those in receipt of rental assistance (38%).

Tenants that were renting an apartment were significantly more likely than tenants renting a house to rate public transport as ‘an important/very important factor’ (44% of those renting an apartment vs 19% of those renting a house).

Those who were most likely to rate public transport as ‘not at all a factor’ were those renting outside Dublin (62%) and outside RPZs (70%) and those renting a house (61%).

Table 3.35: Rating of importance of public transport services when choosing current property to rent (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Age				Total	Age			
		19-24	25-34	35-44	45+		19-24	25-34	35-44	45+
N=	1038	137	443	281	176	1200	158	513	325	204
A very important factor	20%	20%	19%	20%	23%	9%	17%	8%	6%	11%
An important factor	16%	20%	16%	15%	16%	19%	17%	23%	20%	11%
Somewhat of a factor	22%	26%	21%	20%	23%	20%	26%	18%	17%	23%
Not at all a factor	42%	34%	44%	44%	37%	51%	41%	50%	57%	55%

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	1038	407	631	732	305	1200	472	728	905	295
A very important factor	20%	31%	13%	25%	8%	9%	13%	7%	11%	4%
An important factor	16%	26%	10%	22%	4%	19%	33%	11%	24%	7%
Somewhat of a factor	22%	22%	21%	25%	15%	20%	20%	20%	20%	19%
Not at all a factor	42%	20%	55%	29%	73%	51%	35%	62%	46%	70%

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

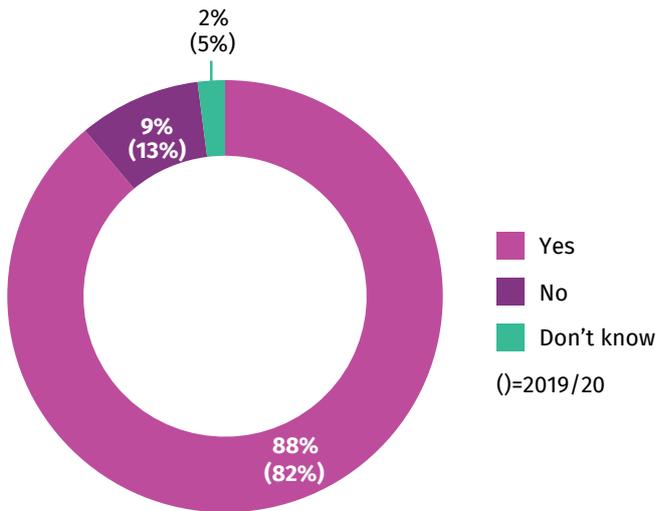
3.4 Awareness of Rights and Responsibilities

This section of the report presents the findings from questions asked about the rights and responsibilities of tenants and landlords and covers issues such as tenancy agreements, rent reviews and terminating a tenancy.

Written Tenancy Agreements

In 2022/23, the proportion of tenants who stated that they have a written tenancy agreement was 88%, up from 82% in 2019/20. Please see Figure 3.30.

Figure 3.30: Whether have a written tenancy agreement (n=1200 (2019/20=1038) tenants)

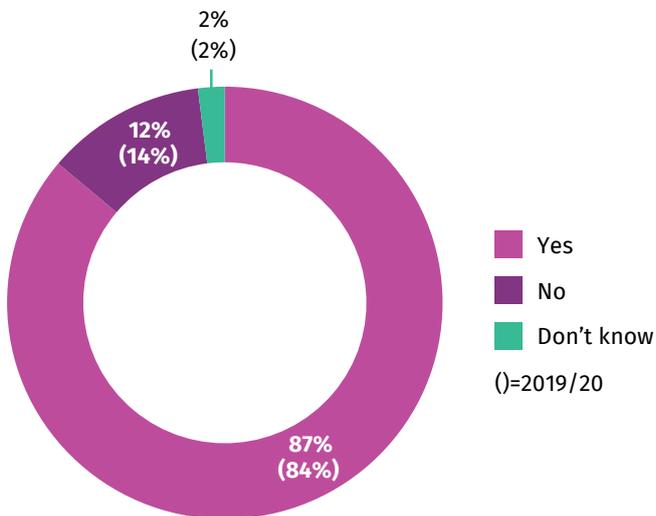


Q.42 Do you have a written tenancy agreement?

Possession of a written tenancy agreement was highest amongst socio-demographic group AB (93% in 2022/23) and HAP tenants (94%) but lowest amongst tenants aged 19-24 (79%).

Figure 3.31 shows that amongst those tenants who have a written tenancy agreement, the vast majority (87%) claim to have read the document. This result was marginally higher than 2019/20 (84%).

Figure 3.31: Whether have read tenancy agreement excluding tenants who do not have a written tenancy agreement (n=1060 (2019/20=850) tenants)



Q.43 Have you read your tenancy agreement?

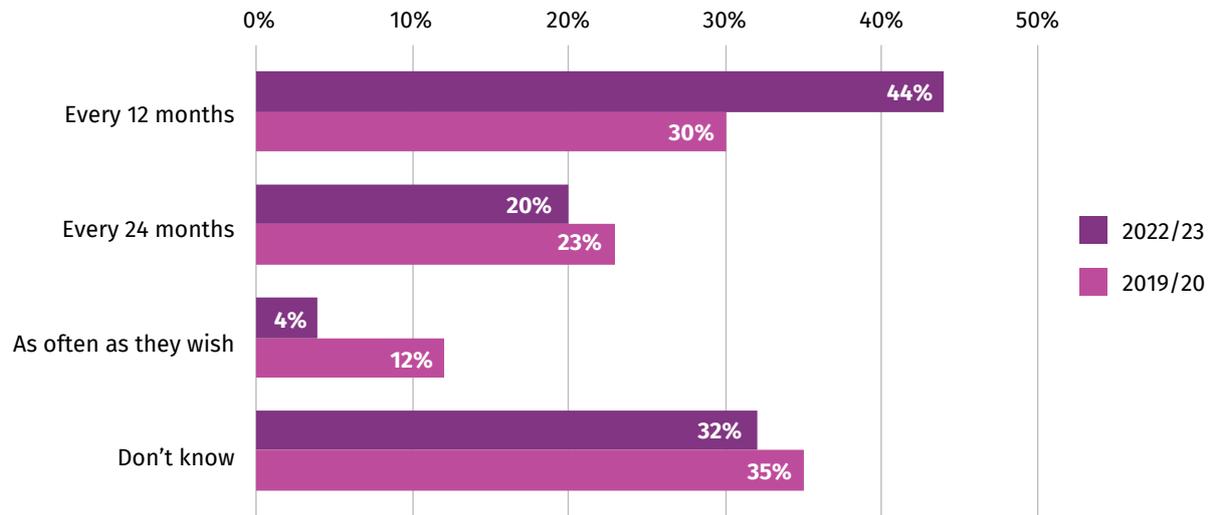
In 2022/23, those aged 19-24 were somewhat less likely than older tenants to have read their tenancy agreement (75%).

Rent Reviews

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

In 2022/23, nearly half (44%) believed that their landlord could review their rent ‘every 12 months’ (up from 30% in 2019/20). A further 20% believed that their landlord could review their rent ‘every 24 months’ (23% in 2019/20). A small minority were of the opinion that their landlord could review their rent ‘as often as they wish’ (4% vs 12% in 2019/20) and 32% stated that they do not know how often their landlord can review their rent (vs 35% in 2019/20).

Figure 3.32: Awareness of frequency of rent reviews (n=1200 (2019/20=997) tenants)



Q.44a How often can your landlord review your rent?

There was no difference in awareness of frequency of rent reviews depending on whether tenants were renting in an RPZ or not.

The level of ‘don’t know’ was highest amongst tenants aged 19-24 (45% in 2022/23) and HAP tenants (46% in 2022/23).

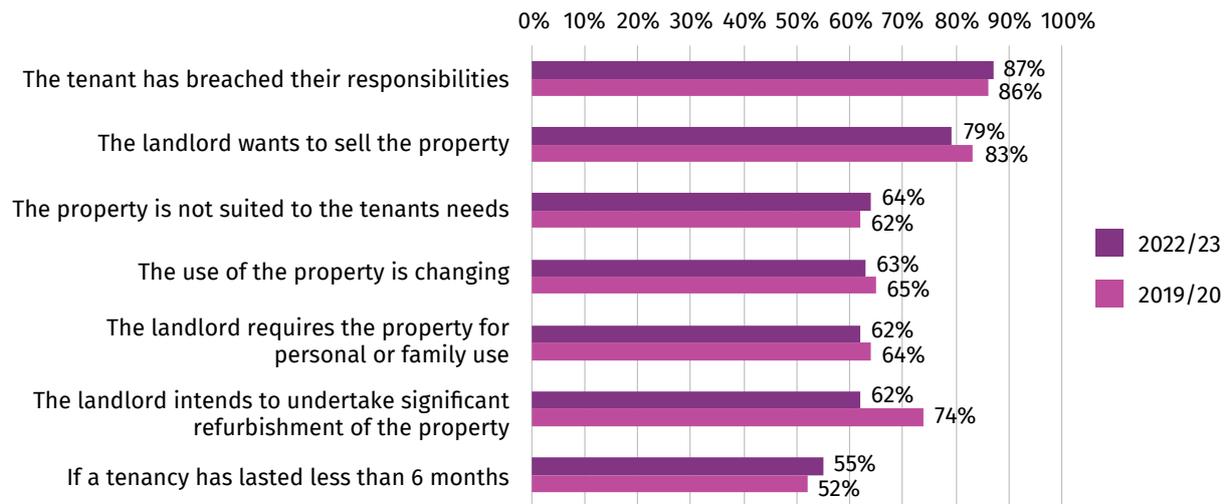
Terminating a Tenancy

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 3.33.

Overall, the results of this question were similar in both surveys.

Awareness was highest for ‘the tenant has breached their responsibilities’ (87% vs 86% in 2019/20), followed by ‘the landlord wants to sell the property’ (79% vs 83% in 2019/20) and ‘the property is not suited to the tenant’s needs’ (64% vs 62% in 2019/20). In 2022/23, tenants were less aware of ‘the landlord intends to undertake significant refurbishment of the property’ as a reason for terminating a tenancy (62% down from 74% in 2019/20). Tenants were least aware that a landlord could terminate a tenancy ‘if a tenancy has lasted less than 6 months’ (55% vs 52% in 2019/20). This is the case where a tenant does not have a fixed-term tenancy.

Figure 3.33: Prompted awareness of reasons a landlord can terminate a tenancy (n=1200 (2019/20=997) tenants)



Q.44b What are the reasons a landlord can terminate a tenancy

There were clear differences in prompted awareness levels by region and whether tenants were renting in an RPZ.

Tenants renting outside of Dublin and outside RPZs showed greater levels of prompted awareness of the reasons a landlord can terminate a tenancy as can be seen in Table 3.36.

Table 3.36: Prompted awareness of reasons a landlord can terminate a tenancy (n=1200 (2019/20=997) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	997	390	606	697	300	1200	472	728	905	295
The tenant has breached their responsibilities	86%	89%	85%	88%	83%	87%	82%	91%	85%	95%
The landlord wants to sell the property	83%	83%	82%	82%	84%	79%	69%	85%	77%	85%
The property is not suited to the tenants needs	62%	56%	65%	59%	67%	64%	54%	70%	58%	81%
The use of the property is changing	65%	60%	67%	63%	69%	63%	52%	70%	59%	75%
The landlord requires the property for personal or family use	64%	57%	69%	61%	72%	62%	52%	68%	57%	75%
The landlord intends to undertake significant refurbishment of the property	74%	71%	75%	74%	74%	62%	54%	67%	58%	75%
If a tenancy has lasted less than 6 months	52%	50%	54%	49%	60%	55%	43%	62%	48%	74%

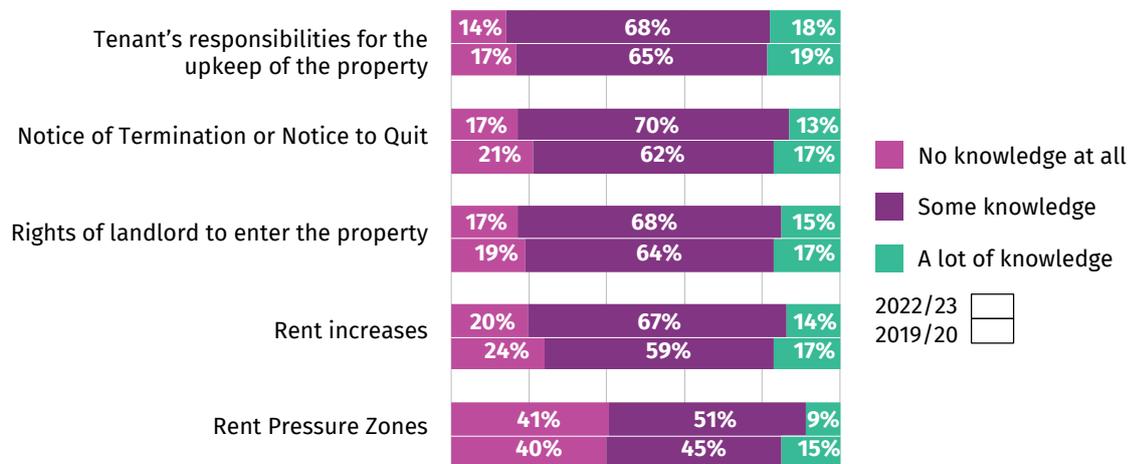
Q.44b What are the reasons landlord can terminate a tenancy

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 3.34.

In both surveys, the majority of tenants appeared to have at least ‘some knowledge’ on a range of issues to do with the rights and responsibilities of landlords and tenants. Tenants appear to be most knowledgeable about ‘tenant’s responsibilities for the upkeep of the property’ (86% had ‘a lot of some knowledge’ vs 83% in 2019/20), followed by the ‘notice of termination or notice to quit’ (83% vs 79% in 2019/20) and ‘rights of a landlord to enter the property’ (83% vs 81% in 2019/20). There was a small increase in the proportion who claimed ‘some/a lot of knowledge’ about rent increases (81% up from 76% in 2019/20). Overall tenants still appear least knowledgeable about RPZs (60% had ‘a lot of/some knowledge’ on par with 2019/20)).

Figure 3.34: Perceived level of knowledge about rights and responsibilities (n=1200 (2019/20=997) tenants)



Q44c What is your level of knowledge on the following?

Table 3.37 indicates that overall, the youngest age cohort (19-24) had the lowest prompted awareness of the rights and responsibilities of landlords and tenants in 2019/20 and 2022/23.

Table 3.37: Perceived level of knowledge about rights and responsibilities (n=1200 (2019/20=997) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Age				Total	Age			
		19-24	25-34	35-44	45+		19-24	25-34	35-44	45+
N=	997	131	426	269	171	1200	158	513	325	204
Rent Increase										
No knowledge at all	24%	30%	26%	22%	17%	20%	31%	18%	18%	18%
Some knowledge	59%	56%	57%	63%	60%	67%	59%	69%	68%	66%
A lot of knowledge	17%	14%	17%	14%	23%	14%	10%	14%	14%	17%
Rent Pressure Zones										
No knowledge at all	40%	48%	38%	42%	35%	41%	55%	39%	36%	41%
Some knowledge	45%	38%	46%	45%	48%	51%	37%	54%	53%	50%
A lot of knowledge	15%	14%	16%	13%	17%	9%	7%	7%	11%	9%
Notice of Termination or notice to quit										
No knowledge at all	21%	30%	20%	23%	13%	17%	25%	18%	14%	15%
Some knowledge	62%	56%	63%	62%	65%	70%	63%	69%	73%	71%
A lot of knowledge	17%	14%	18%	15%	22%	13%	12%	13%	13%	14%
Tenant's responsibilities for the upkeep of the property										
No knowledge at all	17%	26%	16%	16%	11%	14%	22%	13%	12%	11%
Some knowledge	65%	60%	65%	64%	67%	68%	61%	69%	70%	67%
A lot of knowledge	19%	14%	19%	20%	21%	18%	17%	17%	18%	22%
Rights of landlord to enter the property										
No knowledge at all	19%	26%	18%	20%	14%	17%	24%	17%	14%	17%
Some knowledge	64%	62%	64%	65%	63%	68%	61%	69%	71%	66%
A lot of knowledge	17%	12%	18%	15%	23%	15%	15%	14%	15%	17%

Q44c What is your level of knowledge on the following?

Tenants were also asked if they were ever issued with a Notice of Termination by a landlord. In 2022/23, the incidence of being issued with a Notice of Termination by a landlord was very low (2%), similar to 2019/20 (3%).

Awareness of the Residential Tenancies Board (RTB) and its Functions

In the survey questions were asked aimed at understanding awareness of the RTB and its functions.

While overall awareness of the RTB was significantly higher in 2022/23, prompted awareness of the RTB's individual functions was somewhat lower than the previous survey.

Table 3.38 indicates that overall awareness increased from 47% in 2019/20 to 76% in 2022/23. Awareness of the RTB was consistently higher across all age groups in 2022/23, lowest amongst tenants aged 19-24 (60%).

Irish citizens were more likely than non-Irish citizens to be aware of the RTB. But awareness improved significantly amongst both groups in the most recent survey. Awareness almost doubled amongst non-Irish citizens, from 36% in 2019/20 to 70% in 2022/23.

Table 3.38: Whether aware of the Residential Tenancies Board (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Age				Total	Age			
		19-24	25-34	35-44	45+		19-24	25-34	35-44	45+
N=	1038	137	443	281	176	1200	158	513	325	204
Yes - aware	47%	33%	46%	49%	55%	76%	60%	77%	80%	79%
Not aware	53%	67%	54%	51%	45%	24%	40%	23%	20%	21%

Base: All tenants	2019/20			2022/23		
	Total	Citizenship		Total	Citizenship	
		Irish	Non-Irish		Irish	Non-Irish
N=	1038	640	393	1200	722	476
Yes - aware	47%	54%	36%	76%	80%	70%
Not aware	53%	46%	64%	24%	20%	30%

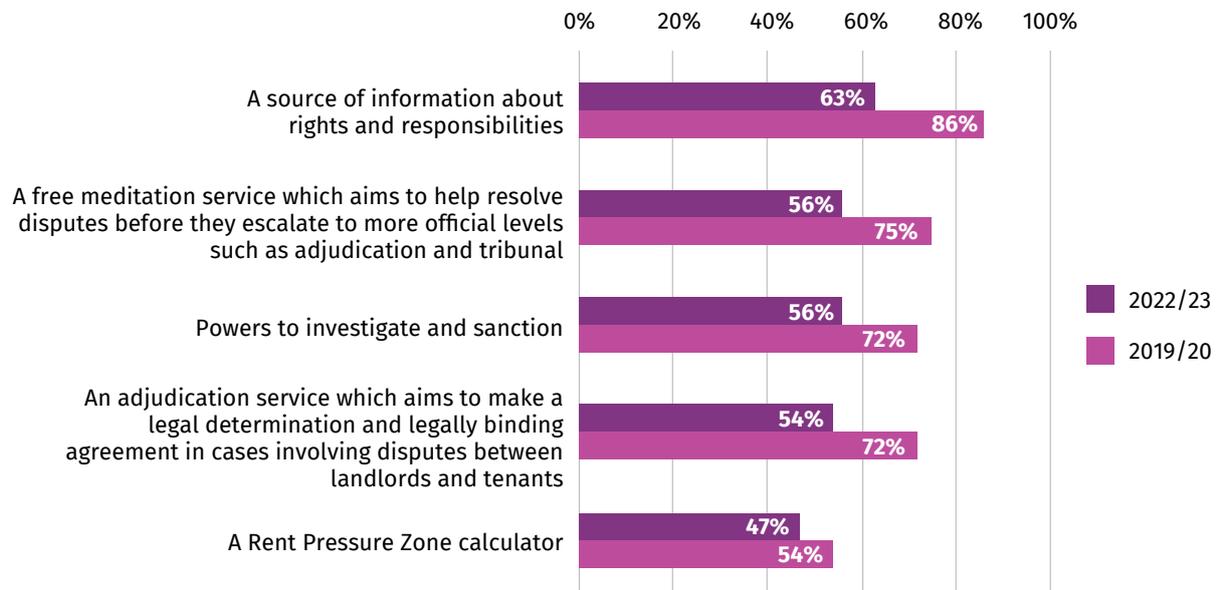
Q.64 Are you aware of the Residential Tenancies Board?

Tenants that were aware of the RTB were prompted with a list of RTB functions and asked which, if any, they were previously aware of.

Despite an increase in overall awareness of the RTB, awareness of the individual functions of the RTB was somewhat lower in 2022/23, as seen in Figure 3.35.

Awareness was highest in both surveys for the RTB as ‘a source of information about rights and responsibilities’ (86% in 2019/2020 and 63% in 2022/2023).

Figure 3.35: Awareness of RTB functions excluding tenants unaware of the RTB (n=909 (2019/20=487) tenants)



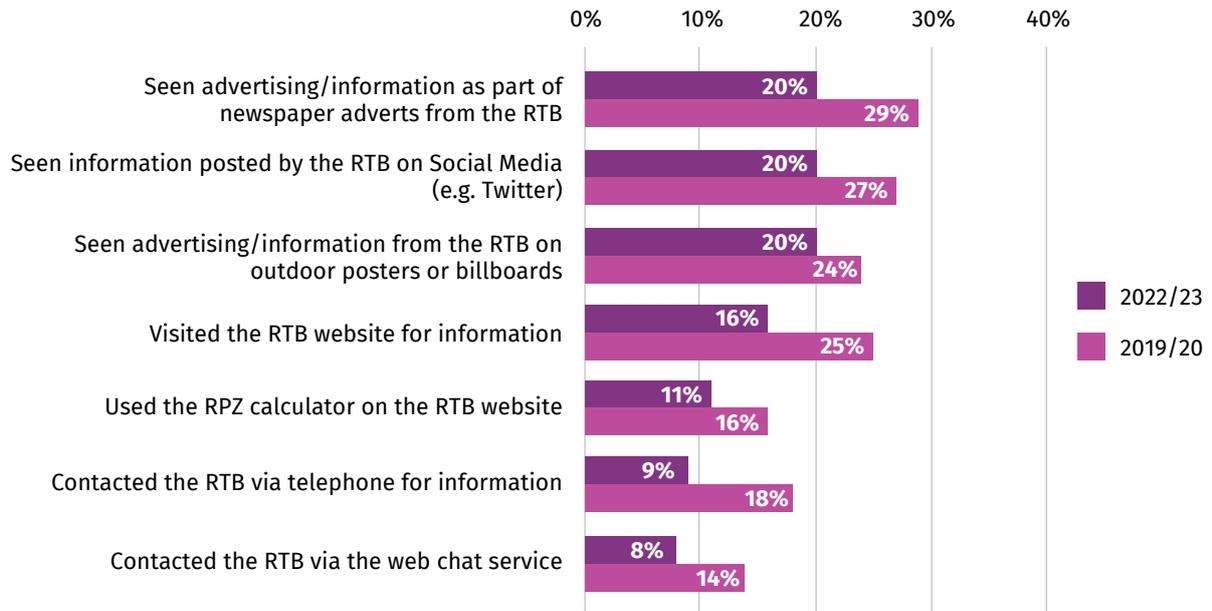
Q.67a Which of the following functions of the RTB were you previously aware of?

Tenants that were aware of the RTB were also shown a list of ways in which they might have ever engaged with the RTB.

Figure 3.36 shows that the level of engagement with the RTB on a variety of aspects was lower overall in 2022/23 than that recorded in the previous survey.

Engagement with the RTB in 2022/23 was highest on social media - one fifth (20%) of tenants aware of the RTB stated that they had ‘seen information posted by the RTB on social media (e.g. Twitter)’, compared to 27% in 2019/20.

Figure 3.36: Engagement with the RTB excluding tenants unaware of the RTB (n=909 (2019/20=487) tenants)



Q.67b Have you ever done any of the following?

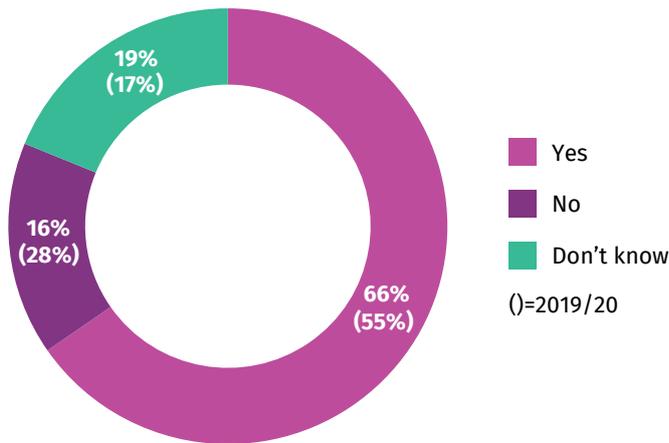
3.5 Property Inspections and Maintenance Requests

Tenants were asked a series of questions about the property they were currently renting, the results of which are presented in this section. Topics covered include property inventory, BER Certificate, Local Authority inspections, landlord inspections, maintenance requests, property issues and property facilities/services.

Property Inventory

Two-thirds (66%) of tenants in the 2022/23 survey stated that an inventory was carried out on their current property when they first moved in. The result for 2019/20 was somewhat lower (55%). A total of 16% stated that there was no inventory carried out (down from 28% in 2019/20) and 19% did not know if an inventory was carried out (17% in 2019/20). Please see Figure 3.37.

Figure 3.37: Whether an inventory was carried out when first moved into current property (n=1200 (2019/20=1038) tenants)



Q.45 Was an inventory carried out on the property you are currently renting when you first moved in?

Table 3.39 shows that in both surveys older tenants (aged 35+) were more likely to be aware that an inventory had been carried out when they first moved into their current property.

Table 3.39: Whether an inventory was carried out when first moved into current property (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Age				Total	Age			
		19-24	25-34	35-44	45+		19-24	25-34	35-44	45+
N=	1038	137	443	281	176	1200	158	513	325	204
Yes	55%	45%	54%	58%	63%	66%	47%	65%	72%	72%
No	28%	31%	28%	27%	27%	16%	23%	17%	13%	11%
Don't know	17%	24%	18%	15%	10%	19%	30%	18%	15%	17%

Q.45 Was an inventory carried out on the property you are currently renting when you first moved in?

Building Energy Rating (BER) Certificate

Familiarity with a Building Energy Rating (BER) certificate increased from 46% in 2019/20 to 58% in 2022/23 as seen in Table 3.40.

Familiarity was highest amongst older tenants aged 35+, socio-economic groups AB and C1 and Irish citizens.

Table 3.40: Whether familiar with a Building Energy Rating (BER) certificate (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Age				Total	Age			
		19-24	25-34	35-44	45+		19-24	25-34	35-44	45+
N=	1038	137	443	281	176	1200	158	513	325	204
Yes	46%	39%	47%	46%	52%	58%	47%	58%	63%	61%
No	41%	45%	42%	38%	39%	34%	45%	34%	29%	31%
Don't know	13%	16%	11%	17%	9%	8%	8%	7%	8%	8%

Base: All tenants	2019/20					2022/23				
	Total	Social Class				Total	Social Class			
		AB	C1	C2	DE		AB	C1	C2	DE
N=	1038	125	289	276	348	1200	197	325	270	408
Yes	46%	63%	46%	53%	35%	58%	66%	68%	62%	45%
No	41%	24%	38%	38%	52%	34%	25%	26%	30%	47%
Don't know	13%	13%	17%	8%	13%	8%	9%	5%	8%	9%

Base: All tenants	2019/20			2022/23		
	Total	Citizenship		Total	Citizenship	
		Irish	Non-Irish		Irish	Non-Irish
N=	1038	640	393	1200	722	476
Yes	46%	50%	40%	58%	69%	43%
No	41%	38%	45%	34%	26%	46%
Don't know	13%	12%	15%	8%	5%	11%

Q.46 Are you familiar with a Building Energy Rating (BER) certificate?

Since 2007, a BER certificate is mandatory for all residential properties offered for rent in Ireland.¹³The 2019/20 survey found that fewer than one in three (31%) tenants were given a Building Energy Rating (BER) certificate for their current property when they first moved in. This figure increased to 39% in the 2022/23 survey. The remaining respondents said either 'no' (39%) or 'don't know' (21%).

In 2022/23, those who were most likely to have been given a BER certificate for their current property included socio-economic groups AB (54%) and C1 (45%), Irish citizens (44%) and tenants renting in Dublin (47%).

¹³ <https://www.seai.ie/home-energy/building-energy-rating-ber/ber-advertising/>

Table 3.41: Whether given a Building Energy Rating (BER) certificate for current property when first moved in (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Social Class				Total	Social Class			
		AB	C1	C2	DE		AB	C1	C2	DE
N=	1038	125	289	276	348	1200	197	325	270	408
Yes	31%	42%	31%	37%	21%	39%	54%	45%	38%	28%
No	46%	42%	44%	45%	51%	39%	27%	36%	45%	44%
Don't know	23%	16%	25%	18%	28%	21%	19%	19%	17%	28%

Base: All tenants	2019/20			2022/23		
	Total	Citizenship		Total	Citizenship	
		Irish	Non-Irish		Irish	Non-Irish
N=	1038	640	393	1200	722	476
Yes	31%	36%	22%	39%	44%	31%
No	46%	43%	52%	39%	37%	43%
Don't know	23%	21%	26%	21%	18%	26%

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	1038	407	631	732	305	1200	472	728	905	295
Yes	31%	40%	24%	34%	23%	39%	47%	34%	38%	41%
No	46%	37%	52%	43%	54%	39%	31%	45%	40%	37%
Don't know	23%	22%	23%	23%	22%	21%	21%	22%	21%	21%

Q.47 Were you given a BER certificate for the property you are currently renting when you first moved in?

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 2022/23 survey found that 16% of tenants had their current property inspected by the Local Authority since moving in. However, the majority (73%) stated that the property had not been inspected and a small proportion stated that they did not know (11%). The figures for 2022/23 were more or less on par with 2019/20 as can be seen in Table 3.42.

In 2022/23, a higher proportion of tenants renting in Dublin had their current property inspected by the Local Authority when compared to tenants renting outside Dublin (25% vs 10%). Tenants in receipt of HAP were most likely to have had their current property inspected by the Local Authority but the figure for 2022/23 was slightly lower than 2019/20 (40% vs 47%).

Table 3.42: Whether Local Authority has carried out an inspection on current property since moving in (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	1038	407	631	732	305	1200	472	728	905	295
Yes	14%	15%	14%	14%	17%	16%	25%	10%	16%	13%
No	72%	64%	77%	72%	72%	73%	59%	82%	71%	79%
Don't know	14%	22%	8%	15%	11%	11%	16%	8%	13%	8%

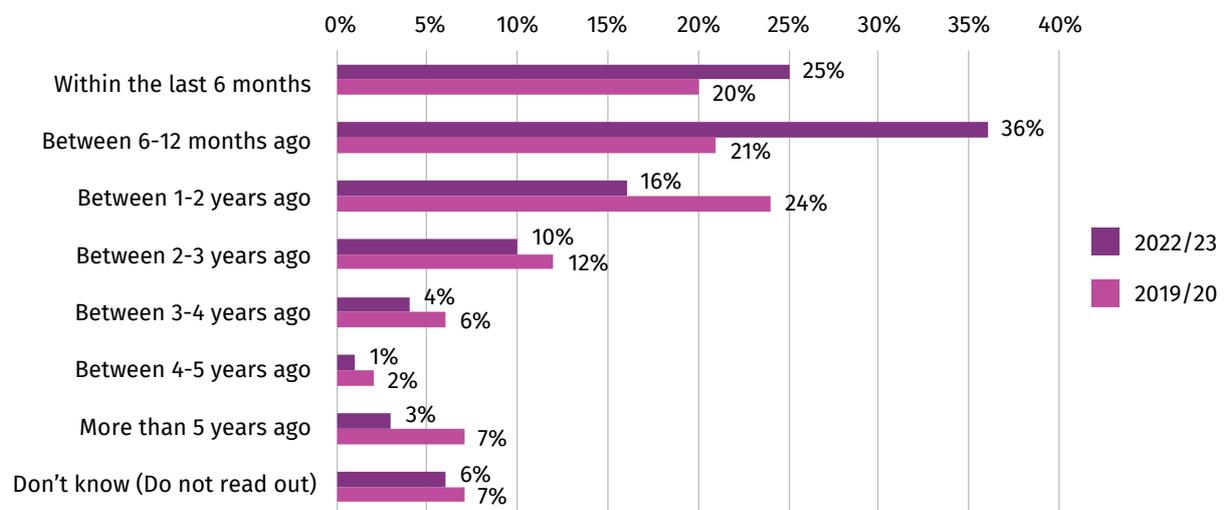
Base: All tenants	2019/20			2022/23		
	Total	Rental Assistance		Total	Rental Assistance	
		Any assistance	HAP		Any assistance	HAP
N=	1038	202	112	1200	219	180
Yes	14%	38%	47%	16%	37%	40%
No	72%	52%	42%	73%	54%	52%
Don't know	14%	10%	11%	11%	10%	8%

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?

Tenants who had their current property inspected by the Local Authority were asked when this inspection was last carried out.

Figure 3.38 illustrates that in 2022/23 a higher proportion of inspections took place within the last six or 12 months when compared to 2019/20 (60% vs 41%). Another one in four (26%) inspections took place between one and three years ago (vs 36% in 2019/20) and 8% of inspections occurred more than three years ago (15% in 2019/20). The remainder didn't know when the last property inspection took place.

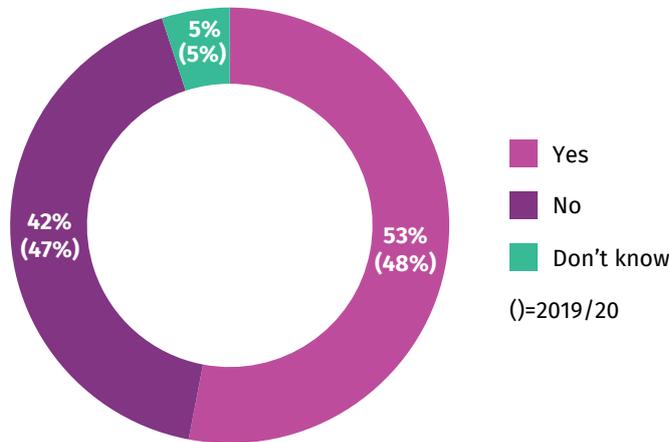
Figure 3.38: Recency of last property inspection excluding tenants who did not have their current property inspected by the Local Authority (n=187 (2019/20=150) tenants)



Q49 When was this inspection last carried out?

More than half (53%) of tenants who had their current property inspected by the Local Authority stated that the inspection identified an issue that the landlord had to fix. This was slightly higher than 2019/20 (48%). The figure was higher inside Dublin (58%) vs outside Dublin (44%).

Figure 3.39: Whether inspection identified any issues that the landlord must fix excluding tenants who did not have their current property inspected by the Local Authority (n=187 (2019/20=150) tenants)



Q.50 Did the inspection identify any issues with your property that the landlord must fix?

Landlord Inspections

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

Nearly half (45%) of all tenants stated that the landlord had carried out an inspection on their current property. The figure for 2019/20 was somewhat lower (37%).

In 2022/23, there was a higher rate of inspection amongst those renting for five years or longer (53%) and those on rental assistance (53%). Please see Table 3.43.

Table 3.43: Whether landlord has carried out an inspection on current property since moving in (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20				2022/23			
	Total	Renting in Total			Total	Renting in Total		
		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs
N=	1038	197	427	414	1200	250	500	450
Yes	37%	22%	39%	43%	45%	38%	42%	53%
No	55%	69%	54%	50%	47%	53%	51%	40%
Don't know	7%	9%	6%	7%	7%	9%	7%	6%

Q.51 Since you've been a tenant in this property has the landlord carried out an inspection on the property?

Base: All tenants	2019/20			2022/23		
	Total	Rental Assistance		Total	Rental Assistance	
		Any assistance	HAP		Any assistance	HAP
N=	1038	202	112	1200	219	180
Yes	37%	42%	41%	45%	53%	53%
No	55%	53%	52%	47%	39%	39%
Don't know	7%	5%	7%	7%	8%	8%

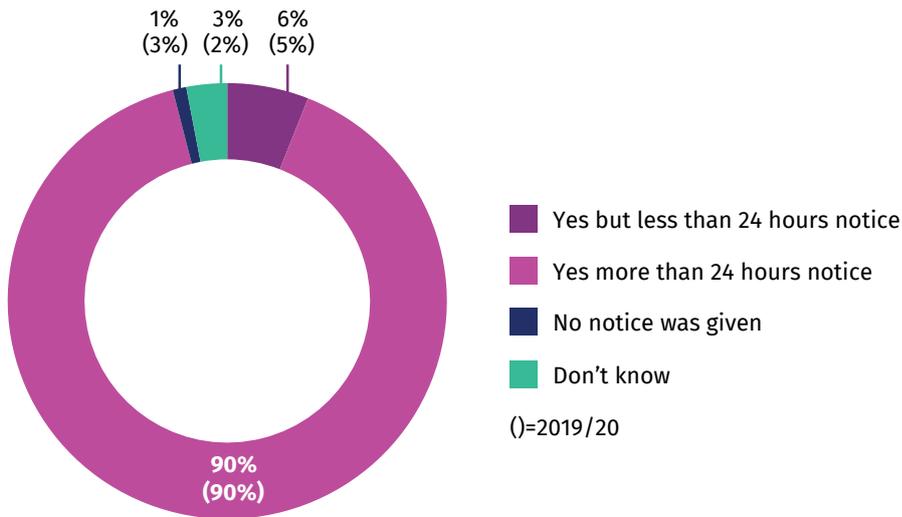
Q.51 Since you've been a tenant in this property has the landlord carried out an inspection on the property?

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.

In both surveys, a total of 90% of all tenants who had their current property inspected by the landlord were given 'more than 24 hours' notice'. A small proportion (6% in 2022/23) were given 'less than 24 hours' notice' and 1% (13) were given 'no notice' at all. Please see Figure 3.40.

The results were fairly consistent across subgroups.

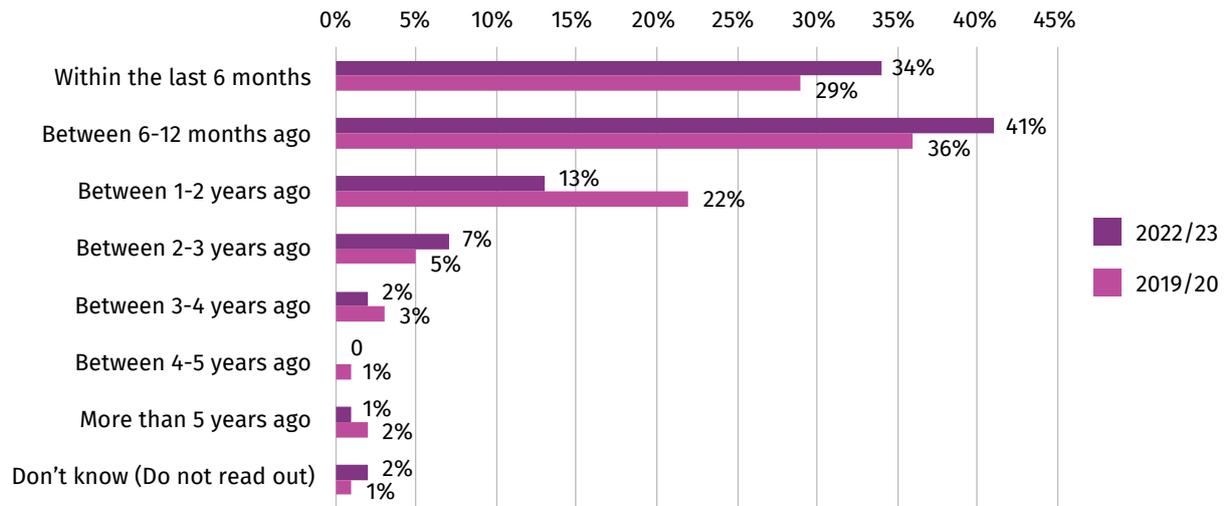
Figure 3.40: Whether landlord gave notice before inspecting excluding tenants whose landlord did not carry out an inspection (n=545 (2019/20=388) tenants)



Q.52 Did the landlord give you notice before inspecting the property?

In 2022/23, three in four (75%) landlord inspections were carried out within the last six or 12 months. The figure for 2019/20 was 65%. The vast majority (87% in 2019/20 and 88% in 2022/23) of inspections were carried out within the last two years of each survey being conducted as can be seen in Figure 3.41.

Figure 3.41: Recency of last property inspection excluding tenants whose landlord did not carry out an inspection (n=545 (2019/20=388) tenants)



Q.53 When was this inspection last carried out?

Table 3.44: Recency of last property inspection excluding tenants whose landlord did not carry out an inspection (n=545 (2019/20=388) tenants)

Base: All tenants	2019/20				2022/23			
	Total	Renting in Total			Total	Renting in Total		
		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs
N=	388	42*	168	177	545	96	209	239
Within the last 6 months	29%	56%	34%	19%	34%	74%	30%	21%
Between 6-12 months ago	36%	42%	41%	29%	41%	21%	49%	42%
Between 1-2 years ago	22%	-	19%	32%	13%	2%	14%	17%
Between 2-3 years ago	5%	-	2%	8%	7%	-	4%	12%
Between 3-4 years ago	3%	-	1%	6%	2%	-	-	4%
Between 4-5 years ago	1%	-	-	2%	*	-	-	*
More than 5 years ago	2%	-	2%	3%	1%	-	1%	3%
Don't know	1%	2%	2%	1%	2%	3%	3%	1%
Within last 12 months	65%	98%	75%	48%	75%	95%	79%	63%

Q.53 When was this inspection last carried out?

Maintenance Requests

In 2022/23, less than half (44%) of all tenants have ever made a maintenance request to their landlord or letting agent while living in their current property. The figure for 2019/20 was similar (47%) as can be seen in Table 3.45.

Tenants renting for five years or longer (61%), non-Irish citizens (51%), those renting outside Dublin (50%) and outside RPZs (53%) and those on rental assistance (52%) were all more likely to have made a maintenance request.

Table 3.45: Whether ever made a maintenance request to landlord or letting agent since living in current property (n=1200 (2019/20=1038) tenants)

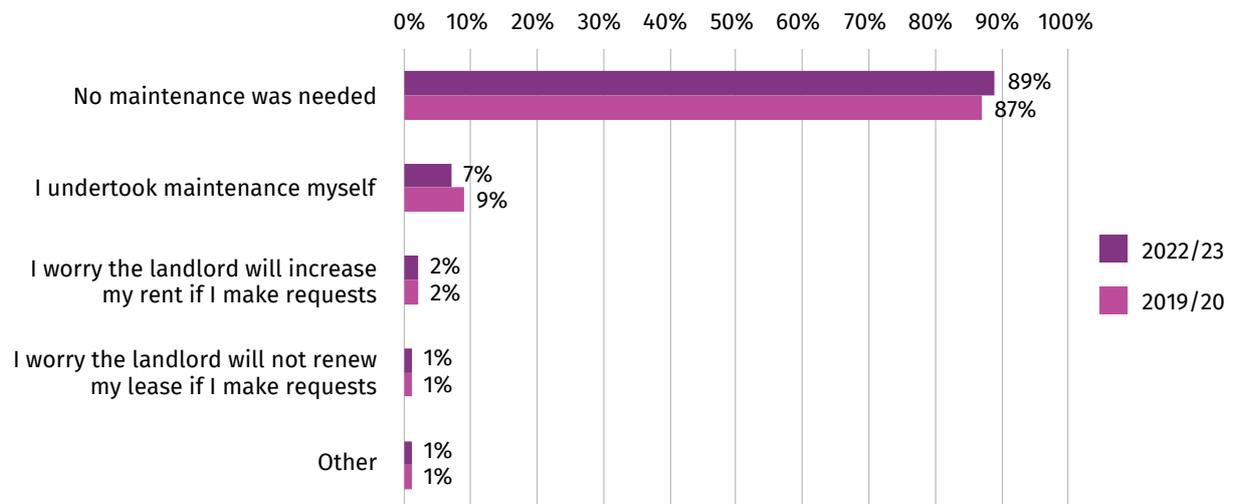
Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	1038	407	631	732	305	1200	472	728	905	295
Yes	47%	42%	51%	46%	50%	44%	34%	50%	41%	53%
No	48%	50%	47%	48%	47%	54%	62%	48%	56%	47%
Don't know	5%	8%	2%	5%	3%	3%	4%	2%	4%	*

Base: All tenants	2019/20				2022/23			
	Total	Renting in Total			Total	Renting in Total		
		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs
N=	1038	197	427	414	1200	250	500	450
Yes	47%	25%	50%	55%	44%	19%	40%	61%
No	48%	72%	46%	38%	54%	77%	57%	37%
Don't know	5%	3%	3%	6%	3%	3%	3%	3%

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 (89% in 2022/23) gave the answer that ‘no maintenance was needed’ and 7% stated that they ‘undertook maintenance myself’. A small minority of tenants (3%) stated that they ‘worry the landlord will increase my rent or not renew my lease if I make requests’ as can be seen in figure Figure 3.42. The 2019/20 results were very similar.

Figure 3.42: Reason for not making any maintenance requests excluding tenants that have made a maintenance request (n=645 (2019/20=473) tenants)



Q54b Why have you not made any maintenance requests?

Long-term renters were more likely to undertake maintenance themselves (14% in 2019/20 and 21% in 2022/23) as can be seen in Table 3.46.

Table 3.46: Reason for not making any maintenance requests excluding tenants that have made a maintenance request (n=645 (2019/20=473) tenants)

Base: All tenants	2019/20				2022/23			
	Total	Renting in Total			Total	Renting in Total		
		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs
N=	473	135	196	142	645	194	287	164
No maintenance was needed	87%	92%	89%	79%	89%	95%	94%	73%
I undertook maintenance myself	9%	5%	7%	14%	7%	1%	3%	21%
I worry the landlord will increase my rent if I make requests	2%	2%	3%	2%	2%	1%	1%	3%
I worry the landlord will not renew my lease if I make requests	1%	1%	1%	1%	1%	1%	1%	3%
Other	1%	-	-	2%	1%	2%	1%	1%

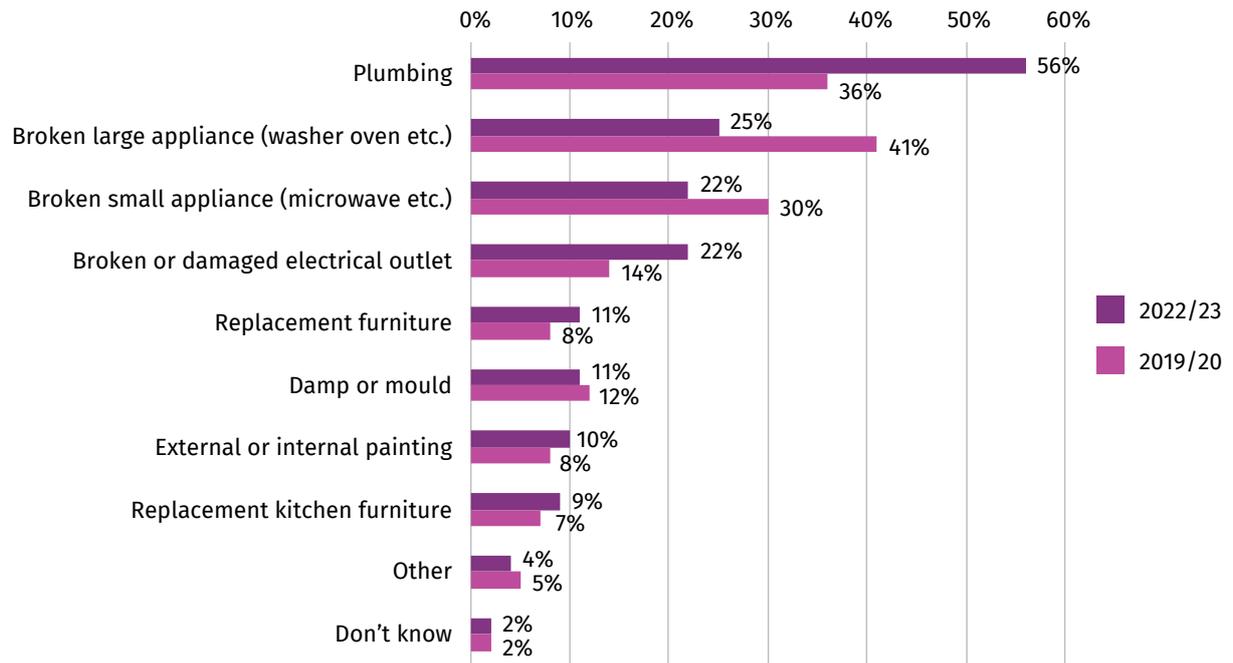
Q54b Why have you not made any maintenance requests?

Tenants that had made a maintenance request were asked the nature of that request. The results are shown in Figure 3.43.

In 2022/23, the most common maintenance requests related to plumbing (56%) and broken large appliances (25%), whereas in 2019/20 a 'broken large appliance' and 'broken small appliance' were more frequently mentioned (41% and 30% respectively). Figure 3.41 illustrates the other maintenance requests that were made by tenants.

The nature of the maintenance request varied only slightly by demographic group. In 2022/23 plumbing requests were most frequent amongst non-Irish citizens (61%) and tenants renting an apartment (64%).

Figure 3.43: Maintenance requests excluding tenants that have never made a maintenance request since living in current property (n=523 (2019/20=492) tenants)

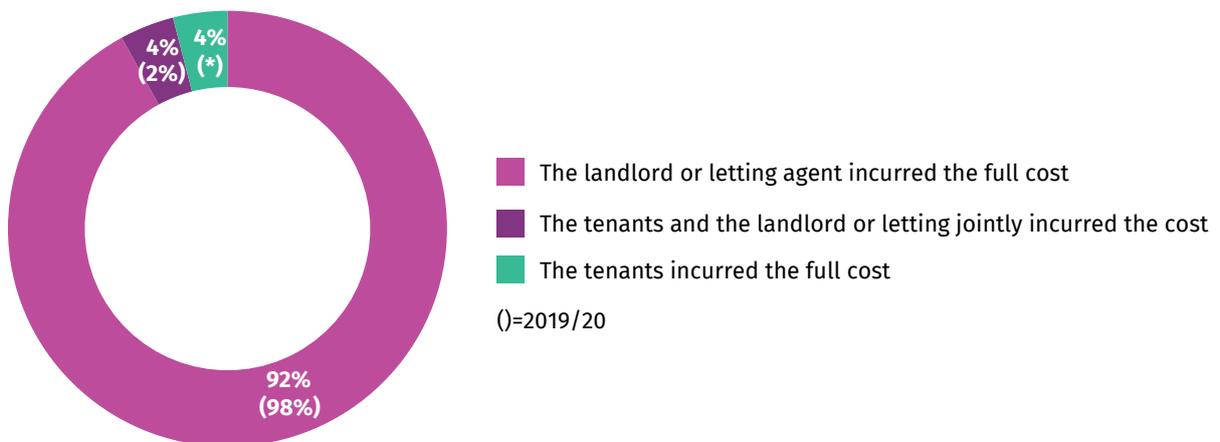


Q55 What was the request related to?

In 92% of cases, the landlord or letting agent undertook the maintenance requested by the tenant. The 2022/23 result was in line with 2019/20 (also 92%).

With regard to the cost of maintenance, the landlord or letting agent incurred the full cost of maintenance in most cases (92% in 2022/23 down from 98% in 2019/20). In 2022/23, the proportion of tenants who incurred the cost of maintenance either fully or jointly with the landlord/letting agent was 8% (vs 2% in 2019/20).

Figure 3.44: 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=523 (2019/20=452) tenants)



Q.56b Who incurred the cost of the maintenance?

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.

Approximately one in four (24%) answered 'yes' to this question, almost on par with 2019/20 (26%).

The incidence of tenants undertaking maintenance work themselves varied significantly by age, region, whether renting inside an RPZ, the length of time renting and property type.

Table 3.47: Whether ever undertaken any maintenance work in current property that should have been brought to the landlord's or letting agent's attention (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20					2022/23				
	Total	Age				Total	Age			
		19-24	25-34	35-44	45+		19-24	25-34	35-44	45+
N=	1038	137	443	281	176	1200	158	513	325	204
Yes	26%	14%	24%	30%	34%	24%	15%	22%	27%	31%
No	74%	86%	76%	70%	66%	76%	85%	78%	73%	69%

Base: All tenants	2019/20					2022/23				
	Total	Region/RPZ				Total	Region/RPZ			
		Dublin	Non-Dublin	Inside RPZ	Outside RPZ		Dublin	Non-Dublin	Inside RPZ	Outside RPZ
N=	1038	407	631	732	305	1200	472	728	905	295
Yes	26%	24%	27%	25%	28%	24%	11%	32%	19%	38%
No	74%	76%	73%	75%	72%	76%	89%	68%	81%	62%

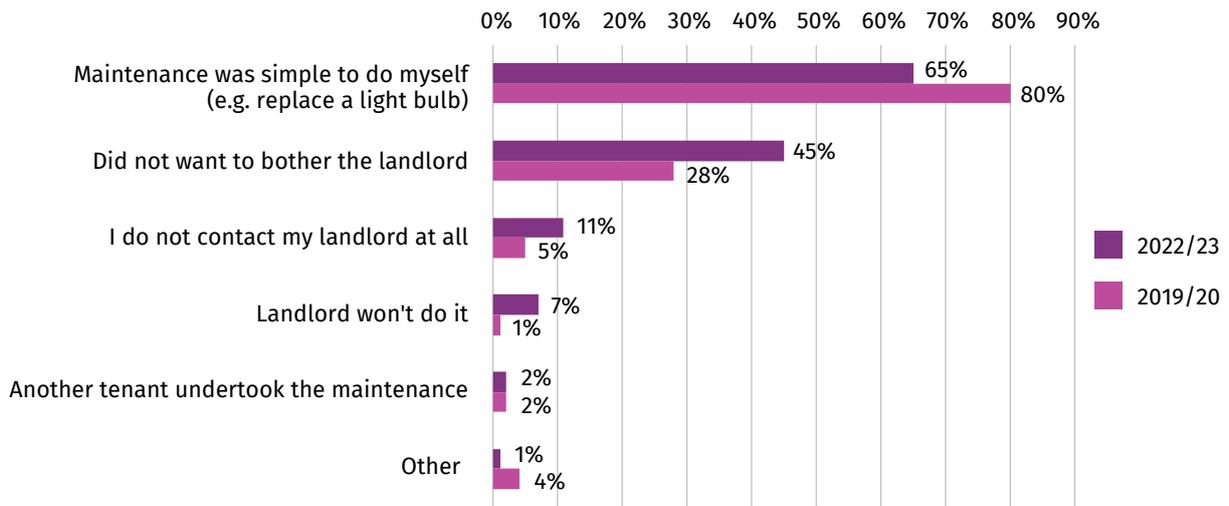
Base: All tenants	2019/20				2022/23			
	Total	Renting in Total			Total	Renting in Total		
		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs		Renting <1 yr	Renting 1-4 yrs	Renting 5+ yrs
N=	1038	197	427	414	645	250	500	450
Yes	26%	11%	23%	36%	24%	8%	15%	43%
No	74%	89%	77%	64%	76%	92%	85%	57%

Base: All tenants	2019/20			2022/23		
	Total	Property Type		Total	Property Type	
		House	Apartment		House	Apartment
N=	1038	748	275	1200	761	428
Yes	26%	30%	17%	24%	31%	12%
No	74%	70%	83%	76%	69%	88%

Q.58a Have you ever undertaken any maintenance work in your current property yourself that you should have brought it to the landlords or letting agents attention?

Amongst those tenants who undertook maintenance work themselves, the majority did so because it was 'simple to do (e.g. replace a light bulb)' (65% down from 80% in 2019/20). The proportion of tenants who mentioned 'did not want to bother the landlord' as a reason increased from 28% in 2019/20 to 45% in 2022/23. Please see Figure 3.45 for details.

Figure 3.45: Reason(s) for undertaking maintenance by oneself excluding tenants who have not undertaken maintenance work themselves (n=287 (2019/20=265) tenants)



Q58b Why did you undertake this maintenance yourself?

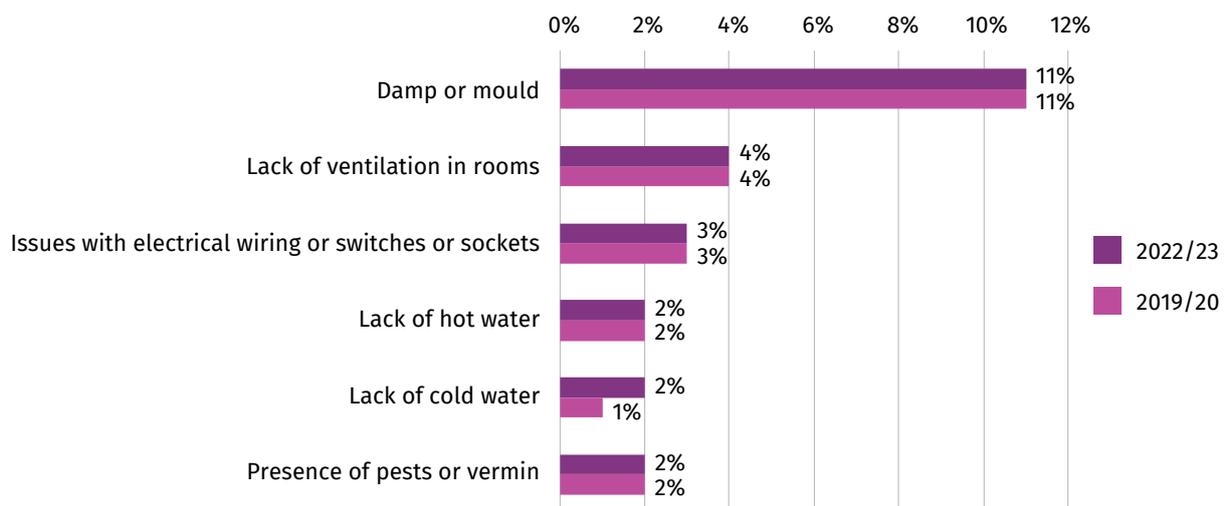
Property Issues

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 3.46.

Damp or mould continues to be the main issue experienced by tenants renting in the private sector.

A total of 11% mentioned 'damp mould' in the 2022/23 survey (on par with 2019/20). 'Lack of ventilation in rooms' was mentioned by 4% of tenants followed by 'issues with electrical wiring/switches/sockets' at 3% (also on par with 2019/20).

Figure 3.46: Whether property has any issues (n=1200 (2019/20=1038) tenants)



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

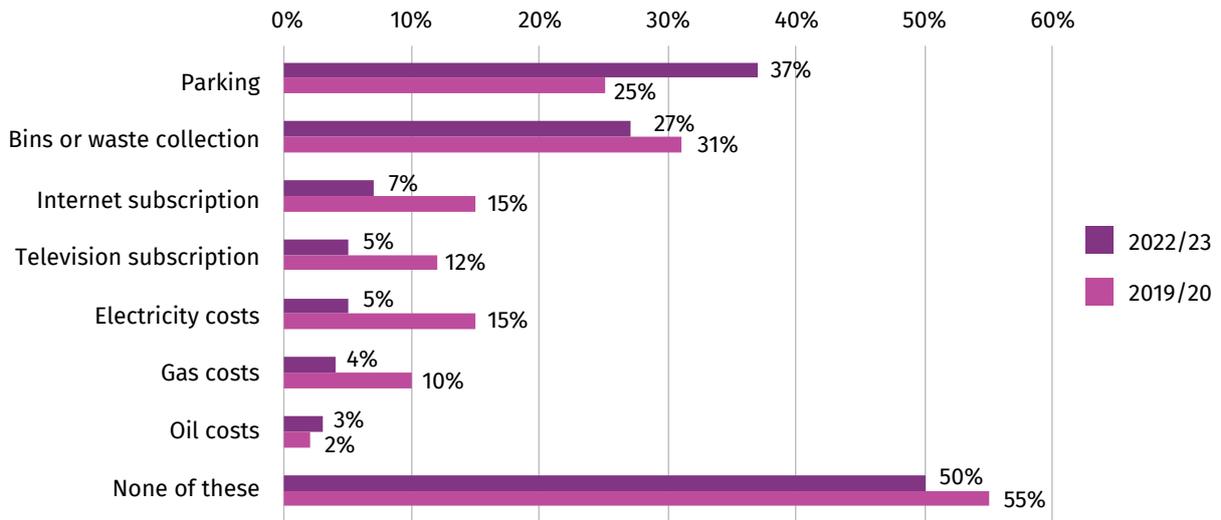
In 2022/23, tenants that were in receipt of HAP were most likely to mention 'damp/mould' as an issue (21%).

Property Facilities/Services

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

In 2022/23, ‘parking’ was the service most likely to be included in monthly rent payments (37% up from 25% in 2019/20). This was followed by ‘bins or waste collection’ at 27% (vs 31% in 2019/20). Other services such as internet subscription, television subscription, electricity costs and gas costs were all at lower levels in 2022/23 when compared to 2019/20 (see Figure 3.47). Half of all tenants (50%) stated that there were no services included in their monthly rent payments (vs 55% in 2019/20).

Figure 3.47: Services included in monthly rent payments (n=1200 (2019/20=1038) tenants)



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

Those who were renting an apartment were more likely than those renting a house to have ‘bins or waste collection’ and ‘parking’ included in their monthly rent payments. In 2022/23, the proportion of tenants with at least one service included in their monthly rent payments was higher amongst tenants renting an apartment (68% vs 40% if renting a house).

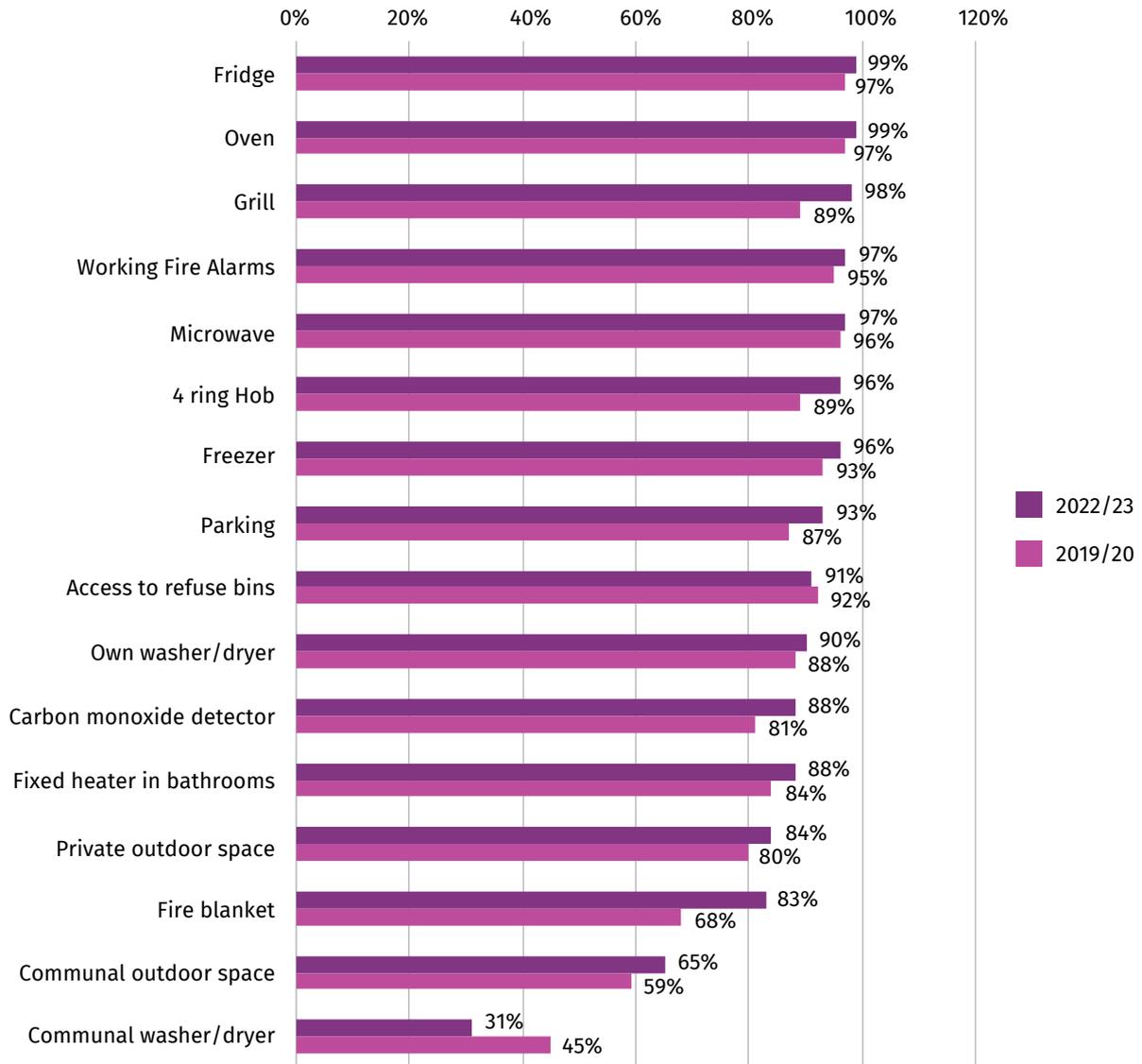
Table 3.48: Services included in monthly rent payments (n=1200 (2019/20=1038) tenants)

Base: All tenants	2019/20			2022/23		
	Total	Property Type		Total	Property Type	
		House	Apartment		House	Apartment
N=	1038	748	275	1200	761	428
Parking	25%	20%	42%	37%	31%	48%
Bins or waste collection	31%	20%	63%	27%	16%	49%
Internet subscription	15%	12%	24%	7%	7%	6%
Television subscription	12%	10%	16%	5%	4%	6%
Electricity costs	15%	12%	24%	5%	4%	5%
Gas costs	10%	8%	16%	4%	4%	3%
Oil costs	2%	1%	4%	3%	3%	2%
None of these	55%	65%	25%	50%	60%	32%

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

Figure 3.48 indicates that overall, there was more widespread access to white goods, smaller electrical items and other facilities amongst tenants surveyed in 2022/23 when compared to 2019/20.

Figure 3.48: Whether property has access to... (n=1200 (2019/20=1038) tenants)



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

3.6 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. Comparisons are made between 2022/23 and 2019/20 where relevant.

Profile of Tenants and Rental Property

- ▶ In 2022/23, the majority (56%) of tenants were in socio-economic group C2DE and 44% were in socio-economic group ABC1. The 2019/20 profile was similar (60% C2DE and 40% ABC1).
- ▶ A higher proportion of tenants were full/part-time employed in 2022/23 (78% vs 66% in 2019/20) and a smaller proportion were looking after the family home (5% vs 11% in 2019/20).
- ▶ In terms of civil status, 54% were either married or cohabiting in 2022/23 (56% in 2019/20). More than one in three (35%) were single – never married (31% in 2019/20) and 7% were divorced/widowed/separated (8% in 2019/20).
- ▶ In 2022/23, non-Irish citizens accounted for 40% of all tenants surveyed (38% in 2019/20). Nearly half (47%) of non-Irish citizens were EU citizens and a slightly higher proportion (49%) were ‘rest of the world’ citizens. In 2019/20, the proportion of EU citizens was higher (52%) and the proportion of ‘rest of the world’ citizens was lower (43%).
- ▶ The average number of occupants living in a rented property was 3.14 in 2022/23. In 2019/20 the average was similar (3.04) and the median was the same (3).
- ▶ In both surveys the vast majority of tenants were sharing their rented property. ‘living with my spouse or partner with children’ was the biggest single category (33% in 2022/23 and 34% in 2019/20), followed by ‘living with others (sharing)’ – 29% in 2022/23 up from 24% in 2019/20. Approximately one in eight tenants were living alone (11% in 2022/23 and 12% in 2019/20).
- ▶ The average length of time renting in the private rental sector was 5.03 years, on par with 2019/20 (5.01 years). The median was 3 years in both surveys.
- ▶ The average length of time renting in their current property was 3.44 years, slightly lower than 2019/20 (3.79 years). However, the median was the same in both surveys (2 years).
- ▶ The average number of properties rented in Ireland was 2.19, slightly lower than 2019/20 (2.43 properties). However, the median was the same in both surveys (2 properties).
- ▶ The proportion of tenants who currently own a property declined from 7% in 2019/20 to 3% in 2022/23.
- ▶ In 2022/23 the proportion of tenants who were living in another rental property before moving into their current property was 59% (on par with 2019/20 at 58%). One in five (19%) were ‘living in the family home with my parents’ and 17% were ‘living abroad’, also more or less on par with 2019/20.
- ▶ It is clear from both surveys that the majority of tenants surveyed had a history of renting in the private rental sector.

Rent

- ▶ In 2022/23, the majority (66%) of tenants who were paying rent were paying ‘directly to a landlord’. However, the figure for 2019/20 was higher (83%). The proportion that paid rent ‘to a letting agent’ increased from 12% in 2019/20 to 28% in 2022/23. This may be an indication of growing professionalisation within the private rental sector.
- ▶ ‘Bank transfer’ remains the most common method used to pay rent (89% up from 85% in 2019/20).
- ▶ The proportion of tenants who were required to provide the landlord with documentation (any) increased from 59% in 2019/20 to 72% in 2022/23. ‘Previous landlord references’ were most often required (46% up from 40% in 2019/20), followed by an ‘employer’s reference’ (45% up from 28% in 2019/20). A significant proportion (28%) stated that they were not required to provide the landlord with any documentation (down from 41% in 2019/20).

- ▶ The vast majority of tenants paid a deposit when first renting their current property (92% in 2022/23 up from 87% in 2019/20). The average deposit paid at a national level was higher in 2022/23 (€1,239.75 vs €1,073.64 in 2019/20) but the median deposit was the same in both surveys (€1,000). Amongst those tenants who paid a deposit, 82% paid one month's rent as the deposit. This was somewhat lower than 2019/20 when 88% paid one month's rent as the deposit.
- ▶ When asked about the total rent paid per month on the property, both the average and the median rent were significantly higher in 2022/23 when compared to 2019/20. The average rent paid at a national level was €1,449.09 in 2022/23 vs €1,109.90 in 2019/20. The median was €1,300 in 2022/23 vs €1,000 in 2019/20
- ▶ In 2022/23, more than half of all tenants surveyed believed that the rent they paid was 'in line with similar properties' in their area (53% vs 48% in 2019/20). One in five believed it was 'lower than similar properties' in their area (19% vs 21% in 2019/20) and a smaller proportion believed it was 'higher than similar properties' in their area (7% vs 9% in 2019/20). significant proportion didn't know how the rent they paid compared to similar properties in their area (20% vs 23% in 2019/20).
- ▶ When asked about the individual rent paid per month on the property, both the average and the median rent were higher in 2022/23 when compared to 2019/20. The average rent paid at a national level was €1,135.60 in 2022/23 vs €967.77 in 2019/20. The median was €1,000 in 2022/23 vs €850 in 2019/20.
- ▶ 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 2022/23 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. This result was on par with 2019/20. More than half of all tenants who answered this question stated that they spent 30% or less of their monthly net income on rent (57% in 2022/23 and 50% in 2019/20). One quarter (25%) spent 31%-40% of their monthly net income on rent (vs 22% in 2019/20) and the remainder (18%) spent more than 40% (vs 27% in 2019/20).
- ▶ The vast majority (93%) 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. This result was on par with 2019/20 (94%).
- ▶ Nearly one third (31%) of tenants indicated that their current rent was higher than when they first moved in (vs 25% in 2019/20). Amongst this group, the rent was €212.61 higher on average in 2022/23 (vs €185.61 in 2019/20). The median was €160 in 2022/23 vs €120 in 2019/20.
- ▶ The majority of these tenants had their most recent rent increase within the last 12 months of being surveyed (60% up from 54% in 2019/20). One in four had their rent increased between 12-24 months ago (24% vs 26% in 2019/20). At the most recent rent review both the average and the median rent increase were higher in 2022/23 when compared to 2019/20. The average rent increase was €118.10 in 2022/23 vs €105.73 in 2019/20. The median rent increase was €100 in 2022/23 vs €70 in 2019/20.

Rent Pressure Zones

- ▶ Awareness of RPZs was higher overall in 2022/23 when compared to 2019/20. In 2022/23, a total of 44% stated that they know what an RPZ is. The figure for 2019/20 was 37%. However, in both surveys the majority of tenants were not aware what an RPZ is (56% in 2022/23 and 63% in 2019/20).
- ▶ Amongst those renting inside RPZs in 2022/23, awareness of RPZs was higher (49% vs 29% outside RPZs). Similarly, in 2019/20 awareness of RPZs was higher amongst those renting inside RPZs (41% vs 26% outside RPZs).

Rental Assistance

- ▶ In 2022/23, the proportion of tenants who stated that were in receipt of some form of rental assistance was 18% in total, almost on par with 2019/20 (19%).
- ▶ Tenants receiving the Housing Assistance Payment (HAP) represented the greatest share (15% up from 11% in 2019/20), followed by the Rental Accommodation Scheme at 2% (3% in 2019/20) and Rent Supplement at 2% (down from 5% in 2019/20).
- ▶ In 2022/23, a top-up payment was made to the landlord by 88% of all tenants in receipt of rental assistance. This compares to 66% in 2019/20. The average top-up payment was higher in 2022/23 (€284.38 vs €255.88 in 2019/20) as was the median amount (€230 vs €200 in 2019/20).

Motivations for Renting and Future Intentions

- ▶ With regard to motivations for renting, the main reasons given in 2022/23 were ‘can’t get a mortgage’ (30%) closely followed by ‘personal reasons’ (29%) and ‘employment reasons’ (28%). Flexibility was also a key factor in 2022/23 with 26% saying ‘renting suits my current situation’ and 11% saying that ‘renting allows me flexibility about where I live’. Convenience was the main reason given by tenants in 2019/20 (with 24% saying ‘it’s convenient to things I need to be close to (e.g. work, college, schools)’).
- ▶ In terms of future intentions, the vast majority (81% vs 84% in 2019/20) of tenants surveyed saw themselves still renting (house/apartment) in 12 months’ time. A small minority (9% vs 7% in 2019/20) thought they would become an owner occupier (house/apartment) and 4% saw themselves renting from the Local Authority or AHB (on par with 2019/20).
- ▶ In the medium term (5 years time), the proportion who saw themselves becoming an owner occupier increased to 34% (on par with 2019/20) and the proportion who saw themselves still renting was 44% (down from 49% in 2019/20). Approximately one in five (6%) saw themselves renting from the Local Authority or AHB during this period (down from 10% in 2019/20). The proportion who mentioned ‘other’ increased from 8% in 2019/20 to 17% in 2022/23. These ‘other’ responses included ‘don’t know’, ‘will consider emigrating’ and ‘will consider returning to the family home’.
- ▶ In the longer term (10 years’ time), 16% saw themselves renting privately in either a house or an apartment, down from 25% in 2019/20. Nearly half (49%) of all tenants thought they would become an owner occupier (house/apartment) during this period (more or less on par with 2019/20). The proportion who saw themselves renting from the Local Authority or AHB was 9% (11% in 2019/20). Once again, the proportion who mentioned ‘other’ increased from 14% in 2019/20 to 26% in 2022/23. The ‘other’ responses included ‘don’t know’, ‘will consider emigrating’ and ‘will consider returning to the family home’.
- ▶ Amongst those tenants who saw themselves becoming an owner occupier within the next 12 months/5 years/10 years, 51% were looking to reduce their monthly housing costs (up from 43% in 2019/20) and 22% were looking to keep their monthly housing costs at roughly the same level (down from 31% in 2019/20). Amongst this same group two-thirds (65% vs 69% in 2019/20) stated that they were currently ‘saving for a deposit’ and 8 were ‘applying for a mortgage’ (up from 14% in 2019/20).
- ▶ When choosing their current property to rent, public transport was considered slightly less important in the 2022/23 survey. Approximately one in ten (9%) considered public transport ‘a very important factor’ compared to in 2019/20. A total of 28% considered public transport ‘a very important/important factor’ vs 36% in 2019/20. One fifth (20%) considered it ‘somewhat of a factor’ (vs in 2019/20), but the majority of tenants (51%) were of the opinion that public transport services were ‘not at all a factor’ when choosing their current property to rent (vs 42% in 2019/20). These results may reflect the move toward hybrid working over the period 2020-2022 (after the 2019/2020 survey was completed and before the 2022/23 survey commenced).

Awareness of Rights and Responsibilities

- ▶ In 2022/23, the proportion of tenants who stated that they have a written tenancy agreement was 88%, up from 82% in 2019/20.
- ▶ There was a slight increase in awareness of frequency of rent reviews but there is still room for improvement. In 2022/23 nearly half (44%) believed that their landlord could review their rent 'every 12 months' (up from 30% in 2019/20). A further 20% believed that their landlord could review their rent 'every 24 months' (in 2019/20). The proportion who believed that their landlord could review their rent 'as often as they wish' declined from 12% to 4% and 32% stated that they do not know how often their landlord can review their rent (vs 35% in 2019/20).
- ▶ Prompted awareness of reasons for terminating a tenancy was similar in 2019/20 and 2022/23. 'The tenant has breached their responsibilities' was mentioned most often (87% in 2022/23 and 86% in 2019/20), followed by 'the landlord wants to sell the property' (79% in 2019/20 and 83% in 2022/23). However, only half of tenants were aware that a tenancy could be terminated 'if a tenancy has lasted less than months' (55% vs 52% in 2019/20).
- ▶ In both surveys, the majority of tenants appeared to have at least 'some knowledge' on a range of issues to do with the rights and responsibilities of landlords and tenants. Tenants were most knowledgeable about 'tenant's responsibilities for the upkeep of the property' (86% had 'a lot of/some knowledge' vs 83% in 2019/20) and least knowledgeable about RPZs (60% had 'a lot of/some knowledge' vs 60% in 2019/20).

Property Inspections and Maintenance Requests

- ▶ Two-thirds (66%) of tenants in the 2022/23 survey stated that an inventory was carried out on their current property when they first moved in. The result for 2019/20 was somewhat lower (55%).
- ▶ Familiarity with a Building Energy Rating (BER) certificate increased from 46% in 2019/20 to 58% in 2022/23. The proportion that were given a BER certificate when they first moved into their current property also increased from 31% in 2019/20 to 39% in 2022/23.
- ▶ A Local Authority inspection was carried out in 16% of cases in 2022/23 (up from 14% in 2019/20). In 2022/23, a higher proportion of inspections took place within the last six or 12 months when compared to 2019/20 (60% vs 41%) and more than half (53% vs 48% in 2019/20) of tenants who had their current property inspected by the Local Authority stated that the inspection identified an issue that the landlord had to fix.
- ▶ The incidence of landlord inspections was more than double that of Local Authority inspections in both surveys. In 2022/23, nearly half (45%) of all tenants stated that the landlord had carried out an inspection on their current property. The figure for 2019/20 was somewhat lower (37%). In 2022/23, the majority (75%) of these inspections were carried out within the last 12 months (up from 65% in 2019/20).
- ▶ In 2022/23, maintenance requests were made by 44% of all tenants while living in their current property. The figure for 2019/20 was similar (47%). In 2022/23, the most common maintenance requests related to plumbing (56%) and broken large appliances (25%), whereas in 2019/20 a 'broken large appliance' and 'broken small appliance' were more frequently mentioned (41% and 30% respectively).
- ▶ One in four 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 (24% in 2022/23 vs 26% in 2019/20). Amongst those tenants who undertook maintenance work themselves, the majority did so because it was 'simple to do (e.g. replace a light bulb)' (65% down from 80% in 2019/20). The proportion of tenants who mentioned 'did not want to bother the landlord' as a reason increased from 28% in 2019/20 to 45% in 2022/23.
- ▶ Damp or mould continues to be the main issue experienced by tenants renting in the private sector. A total of 11% mentioned 'damp/mould' in the 2022/23 survey (on par with 2019/20). 'Lack of ventilation in rooms' was mentioned by 4% of tenants followed by 'issues with electrical wiring/switches/sockets' at 3% (also on par with 2019/20).

Property Facilities/Services

- ▶ In 2022/23, 'parking' was the service most likely to be included in monthly rent payments (37% up from 25% in 2019/20). This was followed by 'bins or waste collection' at 27% (vs 31% in 2019/20). Other services such as internet subscription, television subscription, electricity costs and gas costs were all at lower levels in 2022/23 when compared to 2019/20. Half of all tenants (50%) stated that there were no services included in their monthly rent payments (vs 55% in 2019/20).
- ▶ In 2022/23, the proportion of tenants with at least one service included in their monthly rent payments was higher amongst tenants renting an apartment (68% vs 40% if renting a house). The 2019/20 results were similar.

Rating of Rental Experience

- ▶ Overall, the results of both surveys indicate that tenants' experience of renting and living in the private rental sector was positive.
- ▶ A total of 83% were 'positive/very positive' about renting their current property (79% in 2019/20), 14% were 'neutral' and 3% were 'negative/very negative' (on par with 2019/20).
- ▶ The results were similar when tenants were asked about their experience of renting in this neighbourhood. A total of 84% were 'positive/very positive' (in 2019/20), 14% were 'neutral' and 2% were 'negative/very negative' (on par with 2019/20).
- ▶ However, as was the case in 2019/20, tenants were slightly less positive about their experience of living in the private rental sector in general. A total of 67% were 'positive/very positive' (down from 72% in 2019/20), 22% were 'neutral' and 11% were 'negative/very negative' (up from 8% in 2019/20).
- ▶ Whereas in 2019/20 the experience of tenants renting inside Dublin was more or less on par with that of tenants renting outside Dublin, in 2022/23 the experience of tenants renting inside Dublin appeared to be less positive, not only with their current property and neighbourhood but with renting in the private rental sector in general.

3.7 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 both surveys in this section are based on all those tenants who indicated that they were non-Irish citizens.

In 2022/23, non-Irish citizens accounted for 476 or 40% of all private tenants surveyed. This is slightly higher than 2019/20 when non-Irish citizens accounted for 393 or 38% of all private tenants surveyed.

The profile of Irish citizens in 2019/20 and 2022/23 is set out in Table 3.49. The demographic profile of non-Irish citizens was broadly similar in both surveys, with some differences as follows: non-Irish citizens in 2022/23 were somewhat older (20% aged 45+ vs 14% in 2019/20), more likely to be female (51% vs 45% in 2019/20), renting in Leinster (29% vs 17% in 2019/20), renting in an RPZ (77% vs 72% in 2019/20) and married (57% vs 51%).

Table 3.49: Sample profile of Non-Irish Citizens – 2019/20 vs 2022/23

	Non-Irish Citizens 2019/20 (393)	Non-Irish Citizens 2022/23 (476)
Age		
Young adults 19-24 years	10%	7%
Persons aged 25-34 years	44%	40%
Persons aged 35-44 years	32%	33%
Persons aged 45-54 years	10%	12%
Persons aged 55-64	4%	7%
Persons aged 65+	*	1%
Gender		
Male	55%	49%
Female	45%	51%
Socio-economic group		
AB	12%	14%
C1	27%	26%
C2	28%	23%
DE	33%	37%
Region		
Dublin	42%	37%
Leinster (excluding Dublin)	17%	29%
Munster	22%	20%
Connacht and Ulster	19%	13%
Local Authority Area (Dublin only)		
Dublin City	21%	14%
Dún Laoghaire-Rathdown	6%	6%
Fingal	10%	12%
South Dublin	5%	5%
Rent Pressure Zones		
Inside	72%	77%
Outside	28%	23%
Citizenship		
Republic of Ireland	-	-
Outside Republic of Ireland	100%	100%
Civil Status		
Married or Civil partnership	51%	57%
Cohabiting	13%	12%
Single – never married	27%	23%
Divorced	3%	2%
Widowed	1%	1%
Separated	1%	3%
Prefer not to say	4%	1%

Profile of Non-Irish Citizens

- ▶ In 2022/23, a higher proportion of non-Irish citizens were 'rest of the world' citizens (48% vs 43% in 2019/20). A smaller proportion were EU citizens (47% vs 52% in 2019/20) and 4% were UK citizens (vs 6% in 2019/20).
- ▶ In terms of ethnicity, 55% had a white background (non-Irish) (vs 58% in 2019/20), 16% had an Asian background (vs 21% in 2019/20), 10% had a black background (vs 9% in 2019/20) and 13% had an 'other including mixed background' (vs 6% in 2019/20).
- ▶ Approximately one third were renting a semi-detached house (34% down from 45% in 2019/20) and 29% were renting an apartment in a purpose-built development (29% up from 21% in 2019/20).
- ▶ A similar proportion were 'living with my spouse or partner with children' (44% vs 42% in 2019/20). This compares to 33% of all Irish citizens renting in 2022/23.
- ▶ Amongst those renting for one year or longer, the average time renting was 6.97 years (up from 5.43 years in 2019/20). The average for Irish citizens was 6.35 years in 2022/23.
- ▶ Only 1% 'currently own a property' (down from 5% in 2019/20).
- ▶ Before moving into their current rental property, 26% of non-Irish citizens were living abroad (vs 29% in 2019/20) and 69% were living in another rental property (vs 62% in 2019/20).

Paying Rent

- ▶ When first renting their current property, the median deposit paid by non-Irish citizens was slightly higher in 2022/23 (€1,100 vs €1,000 in 2019/20). The median individual rent paid on a monthly basis was the same in 2019/20 and 2022/23 (€1,000).
- ▶ Amongst non-Irish citizens, the percentage of their monthly net income going towards paying their rent on a monthly basis was lower in 2022/23 (median of 30% vs 35% in 2019/20). The median for Irish citizens was also 30% in 2022/23.
- ▶ Approximately half of non-Irish citizens believed that the rent they paid was 'in line with similar properties in my area' (49% vs 52% in 2019/20). This compares to 56% of all Irish citizens in 2022/23.
- ▶ Non-Irish citizens were more likely in 2022/23 to have provided the landlord with documentation (previous landlord references, employers reference, statement of income, bank statements) prior to renting (75% vs 66% in 2019/20). This compares to 69% of all Irish citizens in 2022/23.

Rent Pressure Zones

- ▶ A slightly higher proportion of non-Irish citizens were renting in an RPZ (77% vs 72% in 2019/20). Awareness of RPZs was slightly higher in 2022/23 (33% vs 31% in 2019/20), but still significantly lower when compared to Irish citizens (51% in 2022/23).

Rental Assistance

- ▶ One in seven (15%) non-Irish citizens stated that they were in receipt of rental assistance, more or less on par with 2019/20 (14%). The figure for Irish Citizens was higher (20% in 2022/23).
- ▶ A total of 92% of all non-Irish citizens who were in receipt of rental assistance paid a top-up payment to their landlord (up from 84% in 2019/20). This compared to 85% of all Irish citizens who were in receipt of rental assistance in 2022/23.

Motivations for Renting and Future Intentions

- ▶ The following reasons were more likely to be mentioned by non-Irish citizens in 2022/23 as reasons for currently renting 'can't get a mortgage' (35% vs 20% in 2019/20), 'personal reasons' (30% vs 15% in 2019/20) and 'employment reasons' (29% vs 13% in 2019/20).

- ▶ Fewer non-Irish citizens see themselves still renting privately in 12 months/five years/10 years' time. In 2022/23 a total of 83% see themselves renting privately in 12 months' time (vs 89% in 2019/20). A total of 44% see themselves renting privately in five years' time (vs 56% in 2019/20) and 18% see themselves renting privately in 10 years' time (vs 28% in 2019/20).
- ▶ More than half 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' (59% up from 52% in 2019/20). This compares to 48% of all Irish citizens in 2022/23.

Importance of Public Transport Services when Choosing Property to Rent

- ▶ Public transport services were rated slightly less important by non-Irish citizens in 2022/23. The proportion of non-Irish citizens who claimed that public transport services were an 'important very important factor' was 32% in 2022/23 vs 40% in 2019/20. The result for Irish citizens was similar (26% in 2022/23 vs 34% in 2019/20).

Awareness of Rights and Responsibilities

- ▶ In 2022/23, a higher proportion of non-Irish citizens stated that they have a written tenancy agreement (91% up from 86% in 2019/20). The figure for Irish citizens was slightly lower (87% in 2022/23).
- ▶ Their knowledge about the frequency of rent reviews was somewhat better in 2022/23. A total of 68% of non-Irish citizens believed that the landlord could review the rent 'every 12/24 months' in 2022/23. This compares to 54% in 2019/20 (46% stated 'as often as they wish' or 'don't know').
- ▶ The awareness of non-Irish citizens in 2022/23 of the reasons a landlord can terminate a tenancy and the rights and responsibilities of landlords and tenants was more or less on par with 2019/20.
- ▶ Familiarity with a Building Energy Rating (BER) certificate amongst non-Irish citizens was slightly higher in 2022/23 (43% vs 40% in 2019/20). This compares to 69% of all Irish citizens in 2022/23 (up from 50% in 2019/20).

Property Inspections and Maintenance Requests

- ▶ Approximately one in ten (10%) non-Irish citizens stated that the Local Authority carried out an inspection on the property. The figure for 2019/20 was 8%. Irish citizens were more likely to have had a Local Authority inspection (19% in 2022/23).
- ▶ With regard to landlord inspections, nearly half (48%) of non-Irish citizens stated that the landlord carried out an inspection on the property. The figure for 2019/20 was lower (36%). Irish citizens were less likely to have had a landlord inspection in 2022/23 (44%).
- ▶ Amongst those who had received a landlord inspection, 75% of all non-Irish citizens believed that the inspection was carried out within the last 6/12 months (vs 72% in 2019/20).

Rating of Rental Experience

- ▶ Non-Irish citizens were most positive about renting in their neighbourhood (85% positive/very positive vs 86% in 2019/20), followed by their current property (82% positive/very positive vs 81% in 2019/20). However, they were less positive about living in the private rental sector in general (64% positive/very positive down from 79% in 2019/20). The results were similar for Irish citizens in both surveys.

3.8 The Experience of Older Renters aged 45+

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

In 2022/23, older renters aged 45+ accounted for 204 or 17% of all private tenants surveyed. In 2019/20, this cohort also accounted for 17% (176) of all tenants surveyed.

The profile of older renters aged 45+ in 2019/20 and 2022/23 is set out in Table 3.50. The demographic profile of older renters aged 45+ was broadly similar in both surveys, with some differences as follows: in 2022/23 older renters aged 45+ were more likely to be renting in Munster (28% vs 20% in 2019/20) and non-Irish citizens (54% vs 31% in 2019/20).

Table 3.50: Sample profile of Older Renters Age 45+ – 2019/20 vs 2022/23

	Older renters aged 45+ 2019/20 (176)	Older renters aged 45+ 2022/23 (204)
Age		
Young adults 19-24 years	-	-
Persons aged 25-34 years	-	-
Persons aged 35-44 years	-	-
Persons aged 45-54 years	61%	61%
Persons aged 55-64	33%	34%
Persons aged 65+	6%	5%
Gender		
Male	54%	52%
Female	46%	48%
Socio-economic group		
AB	9%	12%
C1	14%	14%
C2	27%	18%
DE	50%	56%
Region		
Dublin	39%	33%
Leinster (excluding Dublin)	23%	21%
Munster	20%	28%
Connacht and Ulster	18%	18%
Local Authority Area (Dublin only)		
Dublin City	21%	18%
Dún Laoghaire-Rathdown	7%	4%
Fingal	6%	9%
South Dublin	4%	3%
Rent Pressure Zones		
Inside	70%	72%
Outside	30%	28%

	Older renters aged 45+ 2019/20 (176)	Older renters aged 45+ 2022/23 (204)
Citizenship		
Republic of Ireland	69%	46%
Outside Republic of Ireland	31%	54%
Civil Status		
Married or Civil partnership	46%	45%
Cohabiting	8%	10%
Single – never married	15%	14%
Divorced	8%	8%
Widowed	7%	9%
Separated	11%	10%
Prefer not to say	6%	4%
Dwelling Type		
Detached House	11%	10%
Semi-detached House	38%	38%
Terraced House	26%	22%
Apartment purpose built	22%	19%
Apartment / flat converted	3%	10%

Profile of Older Renters Aged 45+

- ▶ The majority (61%) of older renters were aged 45-54 and the remainder were aged 55+ (39%).
- ▶ In terms of employment status, the majority of older renters were full/part-time employed (69% in 2022/23 up from 57% in 2019/20). The proportion 'unable to work due to sickness or disability' was 7% (down from 15% in 2019/20) and 7% were 'retired' (vs 9% in 2019/20).
- ▶ One in four older renters were living alone (25% vs 26% in 2019/20). This compares to 11% of all private tenants in 2022/23.
- ▶ Amongst those renting for one year or longer, the average time renting was 9.63 years (up from 8.44 years in 2019/20). This compares to an average of 6.35 years for all private tenants in 2022/23.
- ▶ On average, older tenants moved into their current property 6.67 years ago (7.40 years ago in 2019/20). This compares to 4.59 years ago for all private tenants.
- ▶ Before moving into their current rental property, 65% of older renters were 'living in another rental property' (vs 68% in 2019/20) and 6% were 'living in a property that I owned' (vs 10% in 2019/20). Nearly one fifth (18%) were 'living abroad' (up from 12% in 2019/20).
- ▶ In 2022/23, the average number of properties rented by older renters was 2.70 (2.86 in 2019/20), whereas the average number for all private tenants was 2.19 (2.43 in 2019/20).

Rent

- ▶ Older renters were more likely in 2022/23 to have provided the landlord with documentation (previous landlord references, employers reference, statement of income, bank statements) prior to renting (68% vs 59% in 2019/20). This compares to 72% of all private tenants in 2022/23.
- ▶ The median deposit paid by older renters on their current property was slightly lower in 2022/23 (€900 vs €1,000 in 2019/20).

- ▶ The median rent paid per month by older renters for their current property was slightly higher in 2022/23 (€1,000 vs €900 in 2019/20).
- ▶ The median spend on rent as a proportion of monthly net income was 30% in 2022/23 (down from 35% in 2019/20).
- ▶ In 2022/23, half (50%) of older renters stated that their current rent is higher than when they first moved into the property. The figure for 2019/20 was 30%. The median rent increase amongst this cohort was €200 in 2022/23 (compared to €150 in 2019/20).
- ▶ Amongst those older tenants who stated that their rent was higher than when they first moved in, nearly half (47%) had their last rent increase within the last six/twelve months and 28% had their last rent increase 12-24 months ago. The figures for 2019/20 were similar.
- ▶ The median rent increase at their most recent rent review was €75 in 2022/23, slightly higher than 2019/20 (€70) and lower than the median for the total sample (€100).

Rent Pressure Zones

- ▶ A similar proportion of older renters age 45+ were renting in an RPZ (72% vs 70% in 2019/20). Awareness of RPZs was slightly higher in 2022/23 (41% up from 37% in 2019/20), but slightly lower than the national average (44% in 2022/23).

Rental Assistance

- ▶ In 2022/23, approximately three in ten (29%) older renters were in receipt of rental assistance at the time the survey took place. This compares to 26% of older renters in 2019/20.
- ▶ Amongst those older renters in receipt of rental assistance in 2022/23 (59), the majority (87%) 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 59% of older renters in 2019/20.

Motivations for Renting and Future Intentions

- ▶ The following reasons were more likely to be mentioned by older renters aged 45+ in 2022/23 as reasons for currently renting 'can't get a mortgage' (33% vs 21% in 2019/20), 'personal reasons' (39% vs 26% in 2019/20) and 'employment reasons' (24% vs 12% in 2019/20).
- ▶ In terms of where they see themselves living in the future, 78% of older tenants aged 45+ see themselves renting privately in 12 months' time (on par with 2019/20). However, fewer see themselves renting privately in five ten years' time. A total of 52% see themselves renting privately in five years' time (vs 59% in 2019/20) and 30% see themselves renting privately in 10 years' time (vs 44% in 2019/20).
- ▶ Amongst those older renters who saw themselves becoming an owner occupier within the next 12 months/5 years/10 years (44), 71% were looking to reduce their monthly housing costs or keep their monthly housing costs at roughly the same level (vs 81% in 2019/20). Amongst this same group 63% stated that they were currently 'saving for a deposit' and 30% were 'applying for a mortgage'.

Importance of Public Transport Services when Choosing Property to Rent

- ▶ In the 2022/23 survey, public transport services were rated slightly less important by older renters aged 45+. The proportion of older renters who claimed that public transport services were an 'important/very important factor' when choosing their property to rent was 22% in 2022/23 (down from 39% in 2019/20). This compares to 28% for the total sample.

Awareness of Rights and Responsibilities

- ▶ The majority of older renters were in possession of a written tenancy agreement in 2022/23 (91% vs 84% in 2019/20) and amongst this group a similar proportion (89% vs 84% in 2019/20) claimed to have read their tenancy agreement.
- ▶ Their knowledge about the frequency of rent reviews was somewhat better in 2022/23. A total of 64% of older renters believed that the landlord could review the rent 'every 12/24 months' in 2022/23. This compares to 54% in 2019/20 (46% stated 'as often as they wish' or 'don't know').
- ▶ Awareness of the reasons a landlord can terminate a tenancy was more or less on par with 2019/20. The proportion that mentioned 'the landlord intends to undertake significant refurbishment of the property' as a reason was significantly lower in 2022/23 (58% vs 80% in 2019/20).
- ▶ Overall, the level of knowledge amongst older renters of the rights and responsibilities of landlords and tenants was slightly higher in 2022/23 when compared to 2019/20.

Property Inspections and Maintenance Requests

- ▶ A total of 72% of older renters stated that an inventory was carried out on their current property when they first moved in (compared to 63% in 2019/20).
- ▶ The majority of older renters were familiar with a Building Energy Rating (BER) certificate (61% up from 52% in 2019/20) and 38% were given a BER certificate when they first moved into their current property (on par with 2019/20).
- ▶ One in five (21%) older renters said that a Local Authority inspection was carried out since moving into their current property, on par with 2019/20 (20%).
- ▶ The incidence of landlord inspections amongst older renters was more than double that of Local Authority inspections – 53% of older renters had received an inspection of their current property by their landlord (up from 41% in 2019/20). More than half (61%) of these landlord inspections were carried out within the last 12 months (vs 50% in 2019/20).
- ▶ Maintenance requests were made by the majority of older renters while living in their current property (51% vs 54% in 2019/20). In 2022/23 there was a higher proportion of maintenance requests relating to 'plumbing' (55% vs 36% in 2019/20) and 'broken or damaged electrical outlet' (27% vs 13% in 2019/20).

Property Facilities/Services

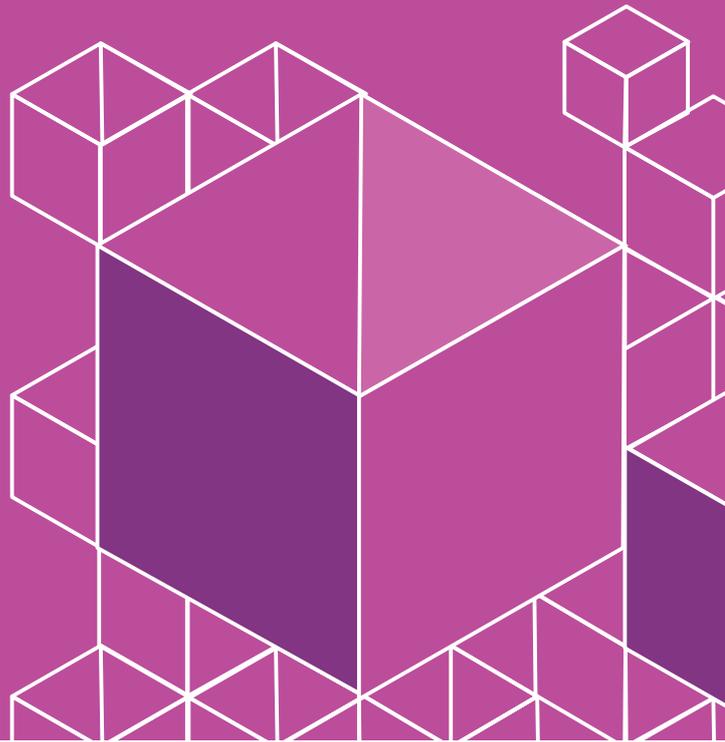
- ▶ Older renters aged 45+ were somewhat less likely to have services included in their monthly rent payments (36% any service included vs 39% in 2019/20). The figure for the total sample was 50% in 2022/23.

Rating of Rental Experience

- ▶ Older renters were most positive about renting in their neighbourhood (85% positive/very positive vs 84% in 2019/20), followed by their current property (82% positive/very positive vs 81% in 2019/20). However, they were less positive about living in the private rental sector in general (67% positive/very positive down from 75% in 2019/20).

Tenants Qualitative Research

4



4.1 Background

Amárach research has been undertaking an extensive research programme on the private rental market for the Residential Tenancies Board (RTB). The key stakeholder groupings researched include:

- ▶ Tenants – using both a quantitative survey and this qualitative research report
- ▶ Letting agents – using both qualitative and quantitative methodologies
- ▶ Landlords – using both qualitative and quantitative methodologies.

This report is focussed on the outcomes of the Tenant qualitative research programme, which was undertaken in late July 2023. It sits alongside the large tenant quantitative research programme that was undertaken between October 2022 and February 2023. It is designed to provide some further insight on the quantitative research. It also fits into the overall market picture and insight that we are building for the RTB.

4.2 Methodological Approach

A qualitative tenant research programme was undertaken in the previous research undertaken for the RTB in 2019/20 and subsequently published. The approach adopted in 2023 was methodologically similar.

Working with the RTB we identified four different groups in the private rented sector:

- ▶ Private Renters aged 19-54 living in Dublin
- ▶ Private Renters aged 19-54 living outside of Dublin
- ▶ Renters aged 19-54 who were born elsewhere and had moved to Ireland
- ▶ Renters aged 19-54 who were in receipt of rental support, e.g. The Housing Assistance Payment

Participants were recruited via the Amárach Research Consumer Panel. Panel members were recruited on the basis of a prequalifying questionnaire, which identified potential participants in each group category. Once a potential group of participants was identified they were interviewed by Amárach's Field Manager. Their availability was checked for the allocated date/time.

Group	Date	Characteristic	Attendees
1	19th July 2023	Private Renters – Dublin	7
2	19th July 2023	Private Renters – outside of Dublin	8
3	20th July 2023	Non-Irish Renters	8
4	20th July 2023	Private Renters with rental support	7

All groups were moderated by Michael McLoughlin – CEO of Amárach Research, supported by the project manager Michele Cluskey. As in 2020 the groups were conducted via Zoom. Zoom is useful in this research context because it enables a diverse range of locations to be included.

4.2.1 The Discussion Guide

A Master discussion guide was developed by Amárach in conjunction with the RTB. The discussion guide focussed on the following core areas:

- ▶ The Market for Rented Properties
- ▶ Their Current Tenure
- ▶ The Housing Journey Travelled by Tenants
- ▶ Current Tenancy and Affordability
- ▶ Awareness of the Residential Tenancies Board and its functions
- ▶ Looking Forward

A more targeted approach was adopted in 2022/23 aimed at exploring differences that were identified in the quantitative research between 2019/20 and 2022/23. Areas that were explored in the Groups include:

- ▶ The role of the landlord vs the letting agent
- ▶ Awareness and understanding of RPZs
- ▶ Motivations for renting
- ▶ Importance of public transport in choosing property to rent
- ▶ Awareness and familiarity with BER
- ▶ Future intentions

In addition, in some Groups, participants were asked more focussed questions – e.g., on the experience of looking for properties when they were in receipt of rental support.

4.3 The Outcomes

4.3.1 The Current Market

Across all groups, the participants all felt that the market was under severe pressure. The pressure was driven by the fact that they had a shared view that there were no properties available to rent. All were hunkered down in their existing properties – hoping that they do not get a notice from the landlord telling them that they are selling up.

They vary in the length of their rental experience. Outside Dublin, they stay in one location for longer periods. Within Dublin they describe having lived in multiple properties over a decade – one participant in Group 1 described living in three different apartments in the same complex over five years – with a completely different rental experience in each property.

Only in a small minority of cases are the moves initiated by them – they tend to be initiated by the landlord serving notice that they are doing something with the property, and they have to find elsewhere. They describe a year-to-year cycle of dreading a letter from their landlord. *'You have no security – especially with the way the market is. Everyone is just dreading getting a notice of termination'* – Male Group 4

Only one tenant was not on a 12-month lease.

The sense of insecurity of tenure is compounded by the lack of availability of alternative properties. Many describe themselves as being 'lucky' because they have a property that is nice to live in, and affordable relative to what a comparable property would cost currently. There was no sense conveyed in any of the groups that any tenant was thinking of moving. One had moved from Cork to Donegal for relationship reasons and found that there was better value available there. Those outside Dublin were aware of some people moving during the pandemic to locations such as West Cork. For those renting in that location the impact was that rents rose as a result. The scale of the movement wasn't such that it impacted in the main urban markets.

Insecurity of tenure in a very tight market has a number of consequences.

- ▶ All but one or two described their property as a house not a home. The few who did, were in Group 4 and had been tenants in the property for a long period of time – in one case almost 17 years.
- ▶ All were wary of raising their head above the parapet. One who had been resident in their property for over five years with a young family asked, *'for a new rug before Christmas – I was dreading doing it, I'd have rather paid for it myself'* Group 2.
- ▶ The inability to make any changes to their property also underscores the house versus home argument. The tenant in Group 4 who described her property as a home had come to an agreement with the landlord where she effectively took over the repairing and replacement elements of the lease in return for a stable rent. Most would like to be able to make minor changes but feel unable to do so.
- ▶ The key fear is of not being able to find something similar for comparable rent. When there is family involved this fear is heightened. There is the potential for disruption to schools, commutes, lifestyle patterns and logistics.

No one thinks that the situation is improving. They typically volunteer that the only way they see the situation changing is that prices will become higher and supply tighter.

The pandemic has had no long-term impact on the market. However, it has impacted on their property needs. The majority of attendees were working from home on a hybrid basis. That creates space pressures at home – but given the absence of alternative options it has not created any thoughts of moving.

The participants lived in a mix of property types. In urban areas they were more likely to be apartments, although those on income support who had families were more likely to be living in houses. They describe using multiple search methods:

- ▶ Daft.ie
- ▶ Word of mouth through friends and colleagues (and in the case of new Irish through national networks).
- ▶ Through previous relationships with letting agents.

No-one described the situation as satisfactory. Many have war stories about queuing for hours in the rain with 10 or 20 other prospective tenants waiting for letting agents or landlords to let them in to view a property. *'It just seems like a lottery when you get there – whether the landlord chooses you or not'* Male Group 1

They view landlords in two ways. They generally have a neutral or relatively positive relationship with their current landlord. Given how many had multiple tenancies, many also have had experiences in the past where the relationship with their landlord was negative. None appeared to be dealing with institutional landlords. While their own experiences may be neutral or positive, much of their behaviour about landlords appears governed by the generic perspective of landlords in the wider community. Here again where their own experience is neutral or positive, they come across as believing that their experience is atypical or that they are 'lucky'. Another area of concern in having to move is that they may be exposed to a negative relationship with a future landlord.

There is no evidence of consistent or predictable behaviour by landlords. While only a minority have negative relationships with their landlord, there is no one standard approach by landlords evident. Some rarely or never see the landlord. Some see them casually every month or two. Some using letting agents, but more do not. There is no sense that the use of letting agents makes any difference in the way the tenancy is handled. Like landlords, some are responsive to requests and queries, others are not.

Some of the new Irish described some difficulties in getting tenancies and wondered whether some of it was down to racism. One woman described a long journey to find a property which was coincidentally successful when she went on her own to view the property. On all other viewings she had been accompanied by her partner who is black.

4.3.2 Their Property Journey

With one or two exceptions they have all lived in multiple properties. In urban areas, some have lived in 10 or more properties and moved habitually every year or two. In the case of recent moves, with one exception, all of the moves that have happened were initiated by the landlord. The length of time that they took to find a new property varied – with one search taking a year. That search was facilitated by the temporary eviction ban during the pandemic.

One thing that came across from all participants in all Groups was how little choice that they could exercise over the property. They targeted a broad area (e.g., a large suburb) and then hoped to find something suitable. All described hoping to get a property. No one described selecting a property – they did not exercise a choice in relation to a specific property. It was not as if they had a list of attributes that they hoped that they could get.

Most are happy enough with where they live – they like the area and amenities. But again, it is important to emphasise that they are takers rather than choosers of property in the market. Even if they are dissatisfied with some aspects of their current property, they feel that they have little choice but to stay firmly rooted where they are – because of the risk, absence of choice or cost of moving.

Public transport was deemed more important amongst those living in city centres and those without a car. Most tenants renting outside Dublin owned a car and were therefore less reliant on public transport services. The majority of participants were working remotely and believed this would continue long term. Amongst those living in city centres, public transport was still considered an important factor when working from home.

With just one or two exceptions in the non-Irish Group, all would prefer to be property owners. The exceptions are those who have not fully decided as to whether they are staying or not. The availability of property to rent will be one factor which contributes to the stay or go decision.

They are not homeowners because they can't afford to be homeowners. It is not a choice that they have exercised in favour of renting. The barriers to affordability mentioned include:

- ▶ Lack of income.
- ▶ Cost of rent not being taken into account in mortgage calculations.
- ▶ Unable to afford a house on a single salary.
- ▶ Cost of living
- ▶ Property costs – in all parts of the Country.

Some, but a minority, were clearly planning to buy property in the future. Even in the Groups with a strong ABC1 presence (Groups 1 and 3), this was generally a medium rather than a short-term project. In truth most did not see themselves as being in a position to buy property – *'unless I got an inheritance or won the lotto'* Female Group 2 – in the medium term. For those with families and in older age cohorts, they did see the strategic advantage of owning their own home. Those in middle age were particularly aware of their vulnerability as tenants as they grow older.

There was no sense that participants had previously owned property, had been impacted by the financial crash and moved to the rental market as a result. Those who were older all described renting since they had established a family. No-one raised any help to buy scheme as a means to bridge the gap between renting and owning property.

Those who are on rental support see no prospect of them buying at all. The combination of their borrowing capacity and the prices simply means that this is not an option of them. One had just secured an offer of housing from her local authority, and she saw this as the long-term housing solution.

4.3.3 Current Tenancy and Affordability

Rent is the most significant item of monthly expenditure.

For those who are not on rental support, rent varies from between 25% and 40% of their monthly household income. All but one tenant on rental support top up their payment to the landlord. This top-up again varies but could amount to between 10% and 25% of their monthly household income. Clearly those on rental support have less disposable income so the percentage payment may be just as costly in practical terms.

They were all impacted by the cost-of-living crisis. They were conscious of all costs and the fact that energy costs in particular had risen. For some their inability to insulate their houses or apply for SEAI grants was a particular bone of contention. They wanted to improve the energy efficiency of their homes but were not allowed to do so.

Nearly all were aware of the RPZ rules governing rental price increases. Some outside RPZs had experienced higher rent increases. They had been told a variety of reasons by the landlord as to why rents had increased, including interest rate rises, general cost increases and comparable rental costs. No-one within an RPZ appeared to have had a rental increase that was above 2%. All had been served with the Notice of Rent Review.

With one exception all pay the rent on a monthly basis. A very small number pay it in cash and their tenancy is clearly not registered with the RTB. The vast majority pay either the landlord or letting agent on a monthly basis. The only 'extras' included in the rent were bins and management charges for apartment complexes.

There is a variable level of inspection – some are formal, and others are casual. Those on rental support schemes cite inspection by the local authority on an infrequent basis. No one in the other three groups mentioned any local authority inspection.

One of the positives cited about renting property was that the tenant was not responsible for the maintenance. One of those on HAP mentioned difficulty in getting anything done to fix the property which she thought was damp. In overall terms the sense was that relationships with landlords were good and they responded to requests. With one exception previously cited, the landlord bore the cost of maintenance. Most of the requests seemed to be related to plumbing.

Most knew what a BER certificate was. Few remembered being given a BER certificate when their tenancy commenced.

When commencing the tenancy all appeared to have had to provide:

- ▶ A reference from a previous landlord.
- ▶ An employer's reference.
- ▶ One month's deposit and one month's rent in advance.
- ▶ Some evidence that they could afford the rent – this could be a bank statement, a statement of income or payslips.

No-one thought the property was good value for money. No-one thought that they were paying more than the current market rent and some thought they were paying well below it. There was no-one living in PRS type complexes where there were other facilities available to tenants.

They thought about value in real and comparable terms. For those who were paying below the market rent, they thought that they were 'lucky' but that it was still a huge amount of money being paid every month. They believed that the reason that their rent was lower than the market rent was due to the attitude of the landlord. They believed that they as tenants suited the landlord, and it was simpler for the landlord to keep them on that basis.

4.3.4 Residential Tenancies Board

The participants are all aware of the RTB. They come across the RTB through the registration of their tenancies. They understand the purpose of the RTB. While one tenant is seeking to use the dispute resolution service, others have sought advice from RTB on various issues and have used that advice in managing landlord relationships. No one had gone through the dispute resolutions service to the point of completion.

They are aware of RTB advertising relatively recently on social media. They are happy that RTB is there and with the role that it plays. In overall terms they look at it positively.

4.3.5 Going Forward

Their attitude to housing is governed by a number of interplaying factors:

- ▶ They would like to buy but cannot afford to for a variety of different reasons.
- ▶ Their choices in the rental market are extremely limited so the default is that they stay put.
- ▶ There are huge concerns about the lack of security in tenure.
- ▶ In addition, they worry about the cost of having to move, simply because they assume that any new rental – if they can get it – will be much more expensive than their current property.

They do not see the national context, or their own context changing. In the words of one woman in Group 3 *'the Irish economy is continuing to grow and attract people in from overseas... there is just nowhere to house them'*.

They do not see their own situation improving as renters. They do not see the cost of housing going down. They fundamentally see the absence of supply as the key barrier to moving or to making any material change in the market. Some have aspirations to buy in the next few years, but they would be a small minority. Even if it is an aspiration, the majority do not see buying as a realistic option in the short, medium or long term.

The one change that they believe would make a difference is the emergence of more secure tenure. In every Group, at different stages within the Group, they illustrated their vulnerability to decisions that might be taken by landlords to end their tenancy. It is the reason they cite as to why they don't regard their house as a home.



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