



PRIVATE TENANTS SURVEY 2016

PRODUCED BY THE RESEARCH UNIT MARCH 2018

Housing
Executive

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A full tabular report, and a copy of this report, is available on the Housing Executive's website at https://www.nihe.gov.uk/index/corporate/housing_research/completed/private_rented_sector_and_rents.htm

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FOREWORD

We are pleased to be able to present key findings from the 2016 Private Tenants Survey. The private rented sector has grown dramatically in size and importance in recent decades. The 2016 House Condition Survey revealed that approximately one in five households in Northern Ireland rented privately. The private rented sector has been the second largest housing tenure in Northern Ireland since 2009.

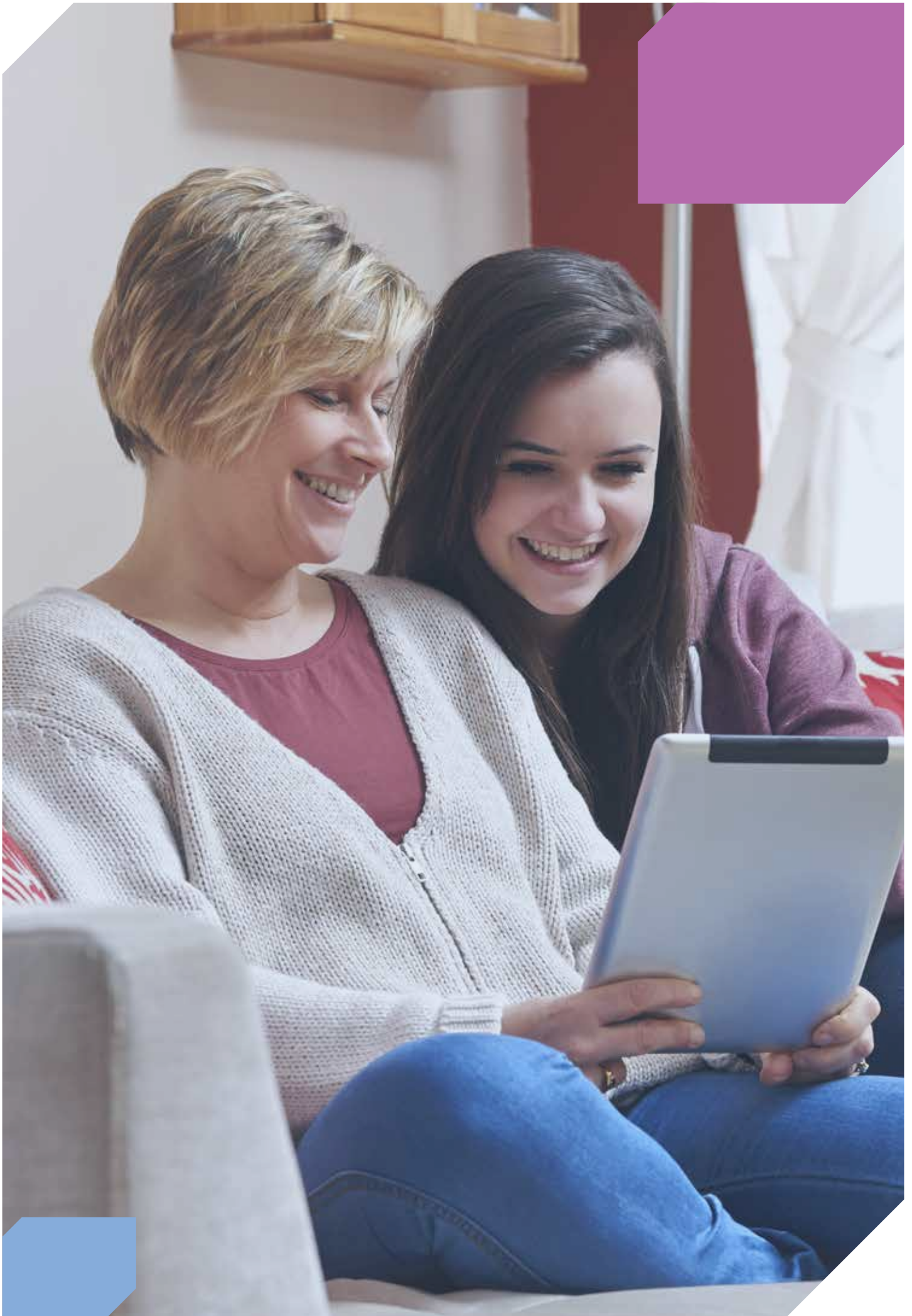
This Survey provides a valuable insight into the experiences of private tenants, covering issues including affordability, the landlord tenant relationship, security of tenure and regulation within the sector.



KARLY GREENE
Head of Research & Equality Services

Survey findings revealed a high proportion of respondents paid an upfront cost to secure their accommodation. While the majority of respondents were responsible for paying all, or part, of their rental charge, three out of five received Housing Benefit. Generally high levels of satisfaction were reported with both the accommodation and the services provided by the landlord/letting agent, however a large proportion of respondents believed further regulation within the sector was needed. The majority of respondents expected to be able to stay in their property for as long as they wanted, with three out of five intending to remain in the private rented sector for the next five years.

Continued research is important to understand this sector of the housing market, which has traditionally been very difficult to access. It is hoped these research findings will inform discussions held by stakeholders and policy makers.



BACKGROUND: THE PRIVATE RENTED SECTOR

The private rented sector has grown dramatically in size and importance in recent decades. The sector houses approximately one in five households in Northern Ireland today^[1], providing homes for a diverse range of individuals and families, including the most vulnerable in society. It is increasingly promoted as an alternative to social housing, alleviating homelessness and providing accommodation for those in housing stress. Private renting is increasingly seen as a longer term housing option by many, in contrast to the stereotypical picture of private tenants being a transient group. The sector is generally characterised by landlords with a small portfolio of one or two properties.

In 2010, recognising the growing importance of the private rented sector, the Department for Social Development published a Private Rented Sector Strategy – Building Sound Foundations – which had a primary objective to create the conditions in which the private rented sector could contribute more fully to meeting rapidly changing housing needs, and ensuring the provision of good quality, well managed accommodation. Changes implemented as a result of this strategy included the introduction of longer notice to quit periods and Tenancy Deposit and Landlord Registration Schemes for Northern Ireland. More recently, the Action Plan for the Department's Housing Strategy for Northern Ireland (2012-2017) again included a commitment to make the private rented sector a more attractive housing option for more people by improving standards and regulation. As part of the Housing Strategy, the Department launched a further review of the role and regulation of the private rented sector in November 2015, and subsequently consulted on a range of further proposals for change in early 2017.

In November 2017, Housing Rights NI held their annual conference on the Private Rented Sector, bringing together a wide range of stakeholders. Two points were highlighted from the outset: first, the importance of housing, its impact on a person's health and well-being and the cost of poor housing and, second, how the sector is affected by the wider social, economic and political context and what happens in other sectors of the housing market.

At the conference, the key challenges facing the sector were recognised as **affordability, security and standards of accommodation**. There was discussion on a 'perfect storm' brewing within the sector: landlords face the combined challenges of changes to tax regulations, welfare reform and rising interest rates. Nonetheless, reliance on and demand for the sector continues to grow, and the need for ongoing attention to be paid to the sector by policy makers is clear.

The overall aim is for a private rented sector that functions well and takes a balanced approach to supporting and protecting both its landlords and tenants. The overarching message coming through at the conference was that the private rented sector 'is here to stay'; therefore it is vital to ensure that this sector remains sustainable.

ABOUT THE 2016 PRIVATE TENANTS SURVEY

Purpose of this research

The Private Tenants Survey provides an important insight into the views and experiences of tenants. This Survey adds to the body of research on the sector, enabling further understanding and contributing to discussions held by its stakeholders.

The sample

This Survey was carried out by the Housing Executive's Research Unit and followed on from the 2016 Northern Ireland House Condition Survey (HCS). A total of 144 tenants were interviewed across Northern Ireland.

The 2016 HCS, also undertaken by the Housing Executive, provided the sample frame for this Survey. The HCS, which was awarded National Statistics status in 2016, is the largest sample survey in Northern Ireland and provides a comprehensive and reliable indicator of housing tenure in Northern Ireland.

[1] NIHE (2017) *House Condition Survey - Preliminary report*. Belfast: NIHE
https://www.nihe.gov.uk/nihcs_2016_preliminary_report.pdf

All private rented householders who took part in the HCS were invited to take part in this Survey. Private tenants have typically been the most difficult sector of the housing market to research; the HCS therefore provided an invaluable and sound source from which to gather a sample frame. For more information on the HCS sample please visit www.nihe.gov.uk/index/corporate/housing_research/house_condition_survey.htm

The questionnaire

The Private Tenants Survey was previously carried out in 2006 and 2012, following on respectively from the 2006 and 2011 HCS. With the help of an advisory group representing a range of bodies, including the Department for Communities and the Chartered Institute of Housing, the questionnaire used in 2012 was updated and modified for this Survey.

Data collection

Face-to-face interviews were carried out with 144 tenants across Northern Ireland between September 2016 and March 2017. As was the case in 2012, an incentivised approach was used to enhance the survey response rate. In 2016, respondents were given a £25 shopping voucher for participating in the research. The achieved response rate was 64%. The achieved sample provided quality, robust data for analysis. Interviews lasted approximately 45 minutes and covered a comprehensive range of topics, including housing history, affordability, the landlord-tenant relationship, future intentions and regulation within the sector.

Presentation of findings

Findings in this report are presented only as percentages. All percentages, excluding private rent stock figures from the HCS, have been rounded. Due to rounding, the percentage total, where given, may not equal 100%. Caution should be applied when interpreting some findings, as at times response categories have been grouped together. For a full list of responses, please refer to the tabular report https://www.nihe.gov.uk/index/corporate/housing_research/completed/private_rented_sector_and_rents.htm

Sampling error

Results from surveys are estimates – in general terms the smaller the sample size, the greater the uncertainty. Results in this report are subject to a margin of error, which can affect how changes should be interpreted over time. Margins of error were calculated using a 95% confidence level. Figures from previous Private Tenants Surveys have been included where applicable/available. Changes over time that are found to be statistically significant have been highlighted.

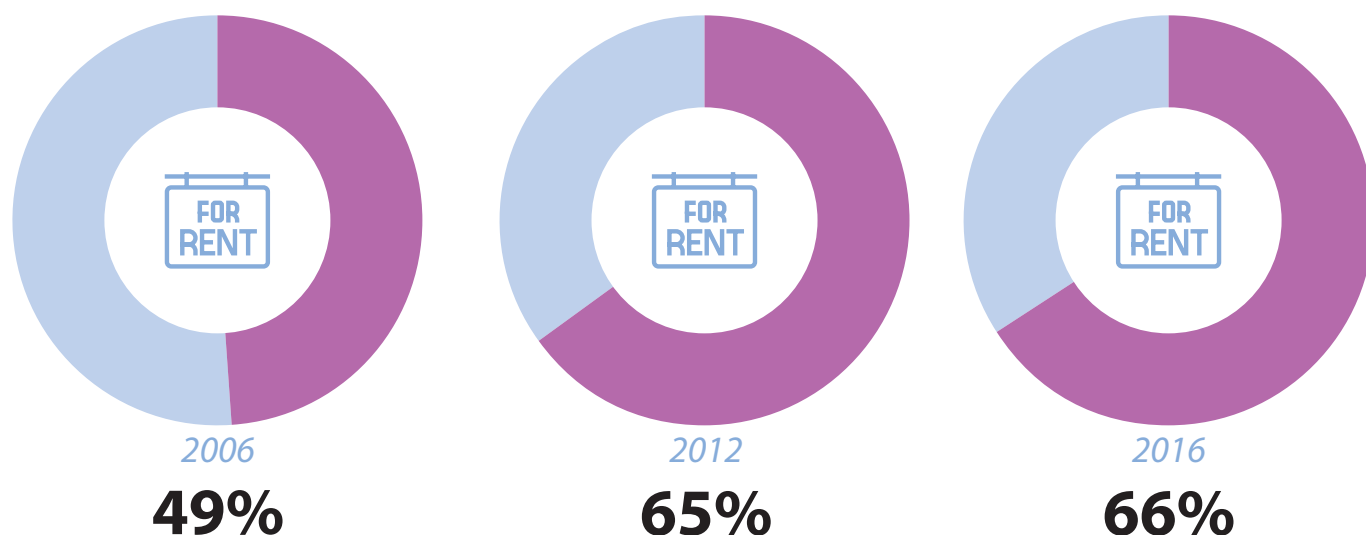
Non-Sampling error

Survey data represent the information as provided by the respondents to the survey. If people give inaccurate responses or certain groups of people are less likely to respond this can introduce biases and errors. Every attempt has been made to minimise non-sampling error through effective and accurate sample and questionnaire design, active fieldwork management, the use of skilled and experienced interviewers and extensive quality assurance of the data. However, it is not possible to eliminate non-sampling error.

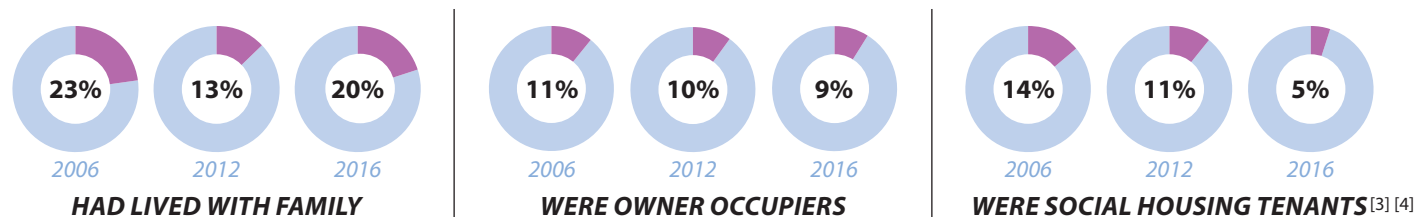
Future Analysis

Household data for survey respondents will be obtained from the 2016 HCS database. In accordance with National Statistics guidelines, this data cannot be released until after the publication of the HCS report in spring 2018. Following publication of this report, further analysis of the Private Tenants Survey will be carried out, looking at survey results by household characteristics.

TENURE IN PREVIOUS ACCOMMODATION



RENTED FROM A PRIVATE LANDLORD OR LETTING AGENT^[2]



The private rented sector has grown dramatically in recent decades, from accounting for 7.6% of housing stock in Northern Ireland in 2001 to 17.4% in 2016^[5] (accounting for 18.4% of households in 2016). The rate of growth increased substantially between 2006 and 2009, when the proportion of dwellings that was privately rented in Northern Ireland increased from 11.5% to 16.8%^[6]. The proportion has remained broadly the same since 2009, and findings from the Private Tenants Surveys broadly mirror this trend.^[7]

^[8]

Table 1: Private rented dwellings in NI as a proportion of total housing stock (excluding vacant dwellings) (2001-2016)^{[9] [10] [11]}

2001	2006	2009	2011	2016
7.6%	11.5%	16.8%	16.5%	17.4%

Since 2009, private renting has overtaken the social sector as the second largest housing tenure in Northern Ireland.^[12]

^[2] Rented from a private landlord/letting agent -% change between 2006 and 2016, 2006 and 2012 is statistically significant

^[3] Social housing tenants-% change between 2006 and 2016 is statistically significant

^[4] In 2006 and 2012, 2% of respondents stated 'other' (not included above)

^[5] % change between 2001 and 2016 is statistically significant

^[6] % change between 2006 and 2009 is statistically significant

^[7] NIHE (2011) *Northern Ireland House Condition Survey 2011: Main Report*. Belfast: NIHE

https://www.nihe.gov.uk/northern_ireland_house_condition_survey_main_report_2011.pdf

^[8] See footnote 1

^[9] See footnote 7

^[10] See footnote 1

^[11] Tenure type refers to 'Private Rented and Others'

^[12] See footnote 1

Rising house prices from the turn of the century increased investor activity, but made purchasing a property more unaffordable for individual households, particularly first time buyers. While the global financial crisis of 2007 saw house prices fall, obtaining a mortgage became much more difficult as lenders became more cautious and asked for larger deposits. This also had a significant effect on first time buyers.

Meanwhile, social housing waiting lists remained lengthy, particularly in high demand areas, and the limited availability of public sector funding affected both the standards of existing social housing stock and the capacity to build new homes. Increasing numbers of people, who would have traditionally lived in social housing, were therefore now moving to the private rent sector.

Anecdotal evidence suggests that good property standards and the availability of properties in desirable areas are among the reasons for the growth in the private rented sector.

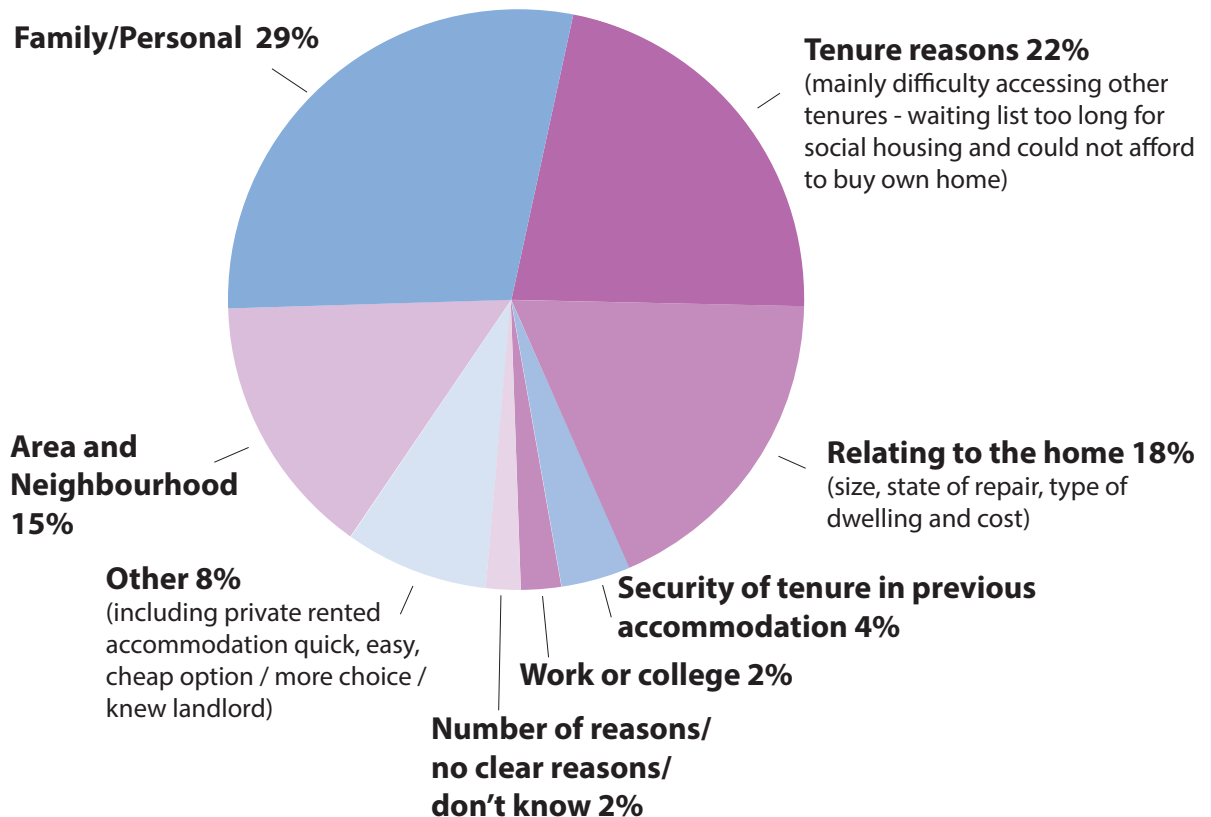
Looking ahead, the general view of delegates at the NI Housing Rights conference in November 2017 was that large scale disinvestment by landlords is not likely and a strong demand for private rented properties continues to exist.

Social housing waiting lists and difficulty accessing the owner occupied sector continue to play an important role in sustaining the demand for private rented housing. However, the reducing proportions of respondents leaving the social and owner occupied sectors to live in the private rented sector evidenced by successive Private Tenants Surveys reinforces the traditionally-held view of these as the more desirable long-term tenure types.

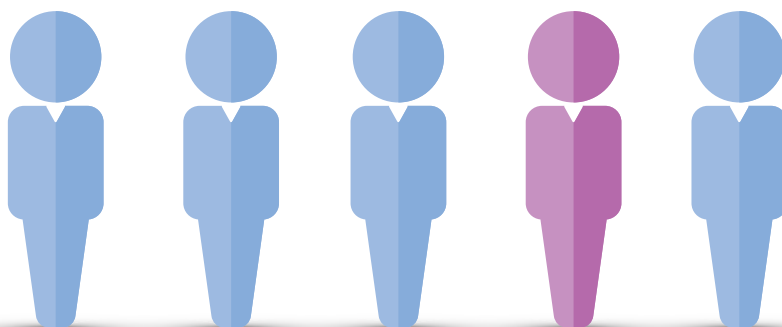
Please note: At the time of the survey, more than two-thirds (69%) of respondents said they had moved into their current accommodation less than five years ago. Only these respondents were asked questions about their previous accommodation, including tenure – this was to minimise the inaccuracies that can arise when respondents are asked for information about events that occurred more than five years ago.

REASONS FOR RENTING PRIVATELY

WHY DID YOU CHOOSE TO RENT YOUR CURRENT HOME FROM A PRIVATE LANDLORD/LETTING AGENT?



In the wider context, difficulty accessing other tenures is a primary reason attributed to the growth, and sustained demand, for the private rented sector. Difficulty accessing other tenures is a recurring theme throughout this report, with one in five respondents stating this as one of their reasons for choosing to rent from a private landlord/letting agent.



TENURE REASONS 22%

(mainly difficulty accessing other tenures - waiting list too long for social housing and could not afford to buy own home)

The reasons for choosing to rent from a private landlord/letting agent were broadly similar in 2012.

The main reasons respondents give for leaving their previous accommodation were reasons relating to the home (including the size, state of repair, type of dwelling and cost) and family/personal reasons. These findings are broadly similar with 2012.

Please note: Only those respondents who had moved into their current accommodation less than five years ago were asked questions about their previous accommodation, including reasons for leaving their previous accommodation. Please see page 8 for further information.

SOME COMMENTS MADE BY RESPONDENTS REGARDING THEIR REASONS FOR CHOOSING TO RENT FROM A PRIVATE LANDLORD/ LETTING AGENT



Can't afford to buy

(Male, 34)

Private renting more affordable for my age – would like to buy in the future

(Male, 21)

Quicker than social

(Female, 28)

Quicker to get housed, more choice compared to NIHE

(Male, 23)

Easy option

(Female, 35)

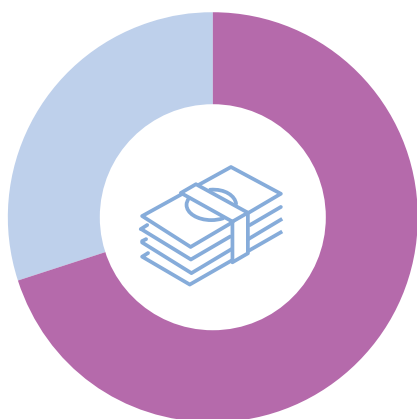
No social housing big enough for family size

(Female, 40)

Couldn't get any other accommodation

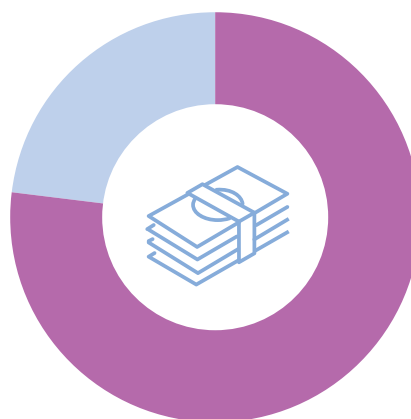
(Female, 29)

UP-FRONT COSTS TO SECURE ACCOMMODATION



2012

70%



2016

77%

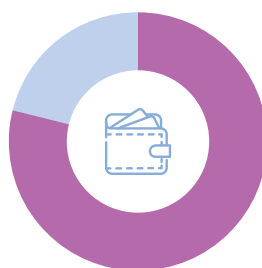
PAID AN UPFRONT COST – DEPOSIT AND/OR RENT IN ADVANCE



2016

£794

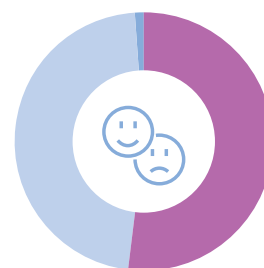
Total mean amount
paid in advance



2016

79%

of those in receipt of Housing
Benefit paid an upfront cost to
secure their accommodation



2016

How easy or difficult to afford the
rent in advance and/or deposit?

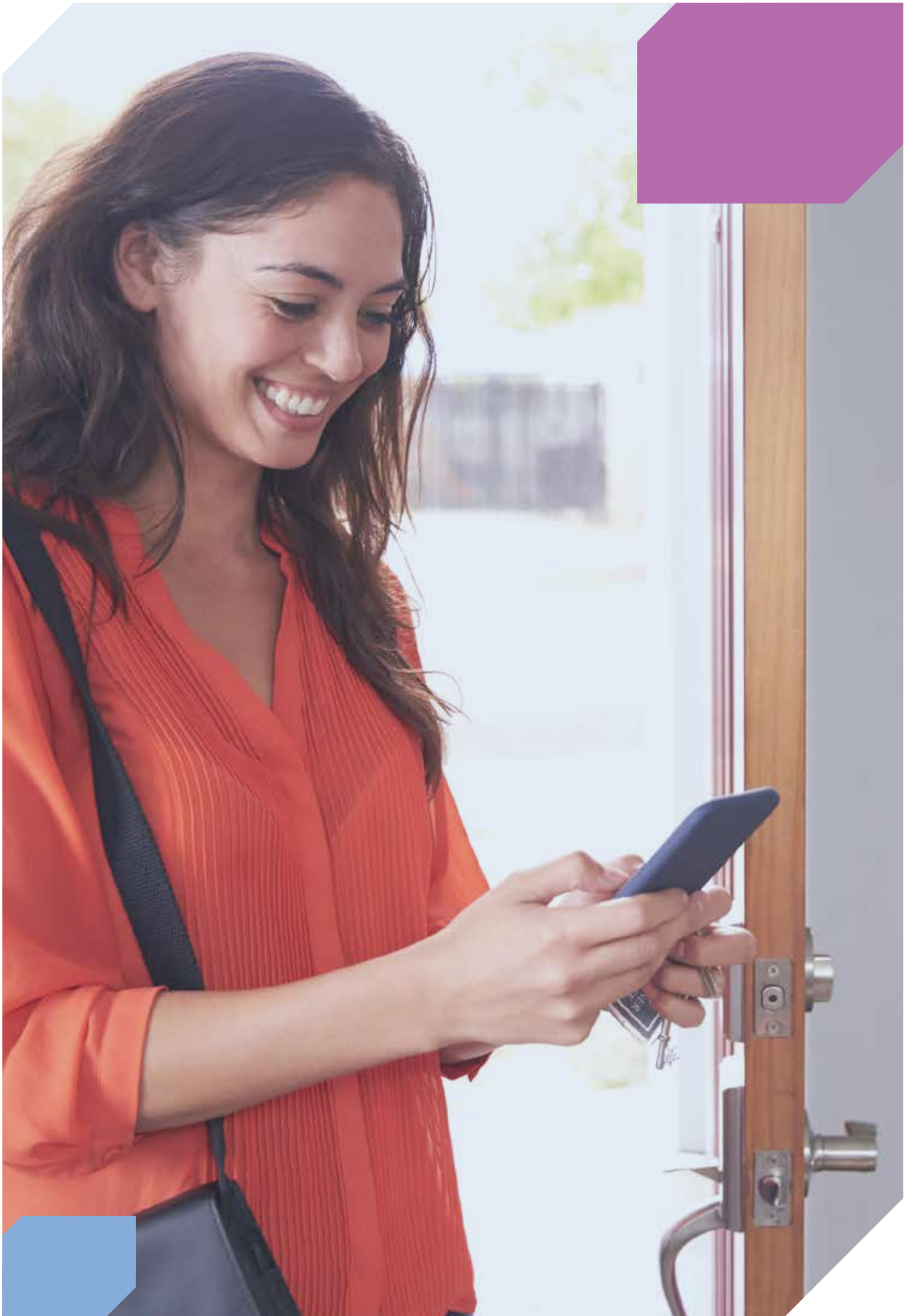
Very/fairly easy **52%**

Fairly/very difficult **47%**

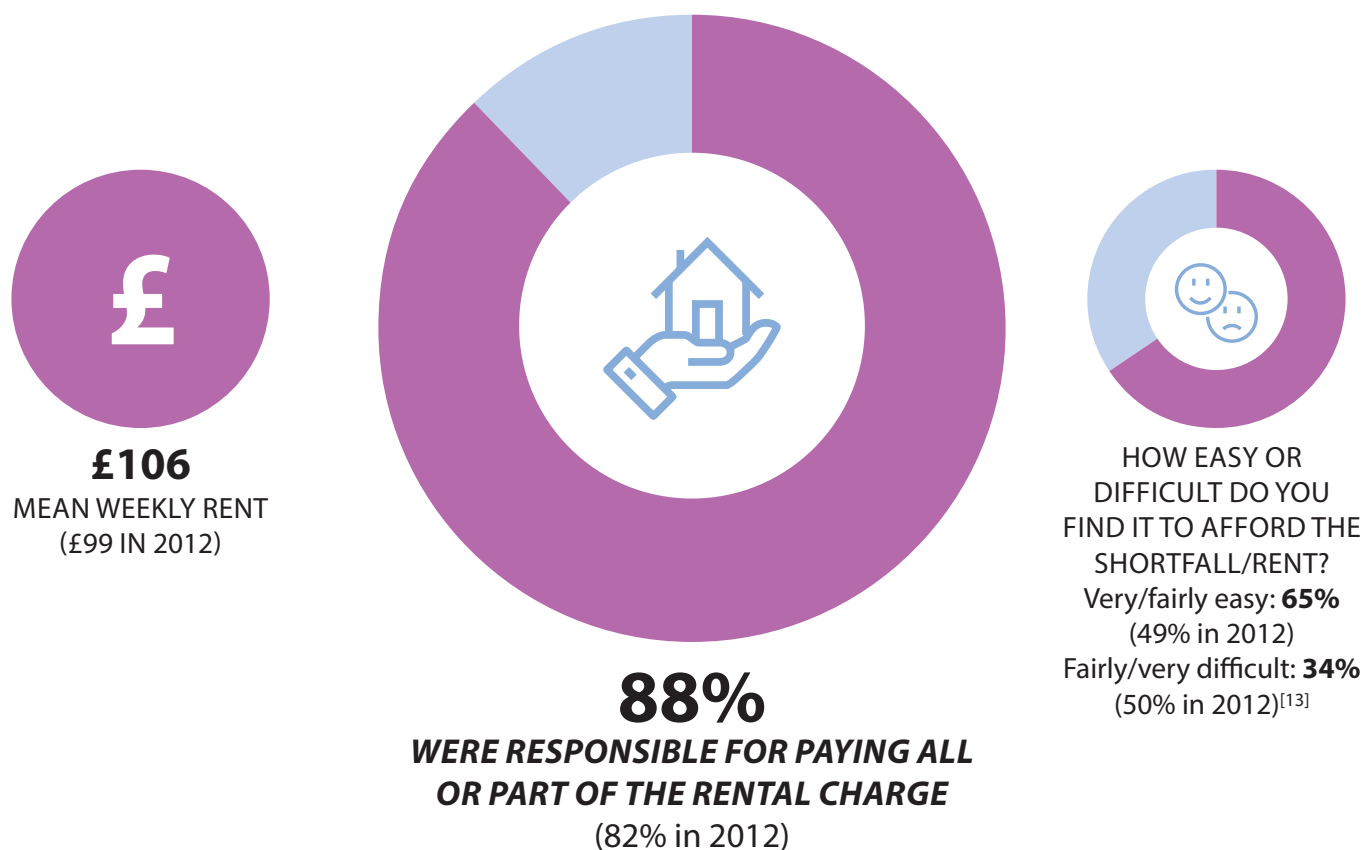
Don't know **1%**

Up-front costs are an important component of affordability within the sector. One in three respondents had received help to pay their deposit and/or rent in advance. The main sources of help

were family and friends. Very few respondents paid any additional upfront costs, however only one in five moved into a property that was furnished.



RENT AND AFFORDABILITY



59% received Housing Benefit; this was broadly similar to the proportion in 2012. 2015/2016 Housing Benefit and 2016 HCS data indicate that around 50% of all private tenants were in receipt of Housing Benefit.

Affordability is crucial to sustaining the private rented sector, and has been highlighted as one of the key challenges facing the sector. An important aspect of affordability is Housing Benefit (LHA). The LHA rates are no higher than the rent for the cheapest 30 per cent of properties in a defined area, known as the broad rental market area (BRMA). Housing Benefit and Local Housing Allowance has begun to be replaced by Universal Credit, through the complex process of Welfare Reform. A number of mitigation measures have been put in place in Northern Ireland, to protect the most vulnerable.

LHA rates have been frozen at the 2015/16 rate for four years from April 2016. Research carried out by the Chartered Institute of Housing revealed that in 2016, 80 percent of LHA rates in Northern Ireland had already fallen below the 30 per cent threshold, partly as a result of the rates being capped in recent years. This means that more householders are liable to pay a shortfall, or a *greater* shortfall, between the LHA rate they receive and the rent the landlord or letting agent is charging. The freeze in LHA rates will further exacerbate this. Housing Benefit is a benefit intended for those on low incomes; inability to meet this shortfall has the potential to result in rent arrears and possible eviction and homelessness.^[14]

The Residential Landlords Association's Private renting Evidence, Analysis and Research Lab (RLA PEARL) published a report in August 2017 as part of ongoing longitudinal research into the

[13] % change between 2016 and 2012, for both categories, is statistically significant

[14] CIH (2017) *Impact of welfare changes on rented housing in Northern Ireland*. Belfast: CIH
<http://www.cih.org/resources/PDF/NI%20policy%20docs/Impact%20of%20welfare%20changes%20on%20rented%20housing%20NI.pdf>

private rented sector. The report, *Welfare Reform and Universal Credit: the impact on the private rented sector*, presented findings from a survey of approximately 3,000 landlords, from across the UK:^[15]

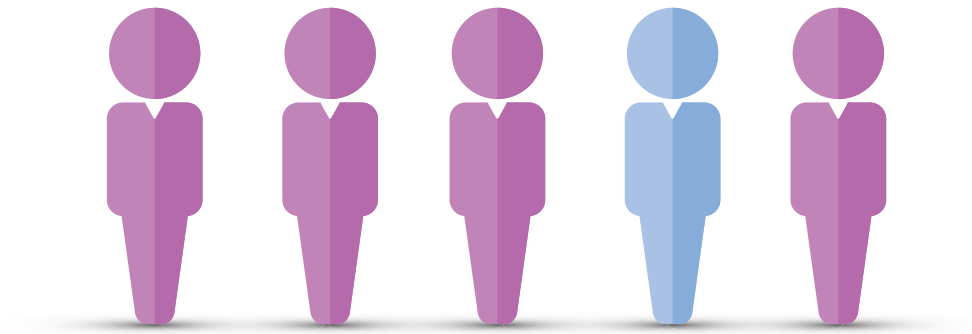
- Overall, 38% of landlords let to tenants on Universal Credit (or LHA).
- In the past 12 months, 38% of landlords had experienced tenants on Universal Credit going into rent arrears.
- In the last 12 months, 29% of landlords had evicted a tenant who was in receipt of Housing Benefit or Universal Credit; the main reason for eviction was rent arrears.
- Only 13% of all landlords surveyed agreed they were willing to let properties to people in receipt of Universal Credit

Around 70,000 tenants in the private rented sector in Northern Ireland are currently in receipt of Housing Benefit, a means tested benefit for those who are on low incomes. Welfare Reform and the phasing in of Universal Credit in Northern Ireland are likely to exacerbate issues facing private renting tenants, including security, affordability and supply. From a supply side, the sector is vital in meeting housing need, including for those who traditionally would have been housed in the social sector. Negative equity amongst accidental landlords^[16], and increases in interest rates, could also possibly drive up rents.

[15] Simcock, T. (2017) *Welfare Reform and Universal Credit: The impact on the private rented sector*. Manchester: RLA
<https://research.rla.org.uk/wp-content/uploads/Welfare-Reform-and-Universal-Credit-The-impact-on-the-private-rented-sector-2017.pdf>

[16] For further information about accidental landlords, see page 25

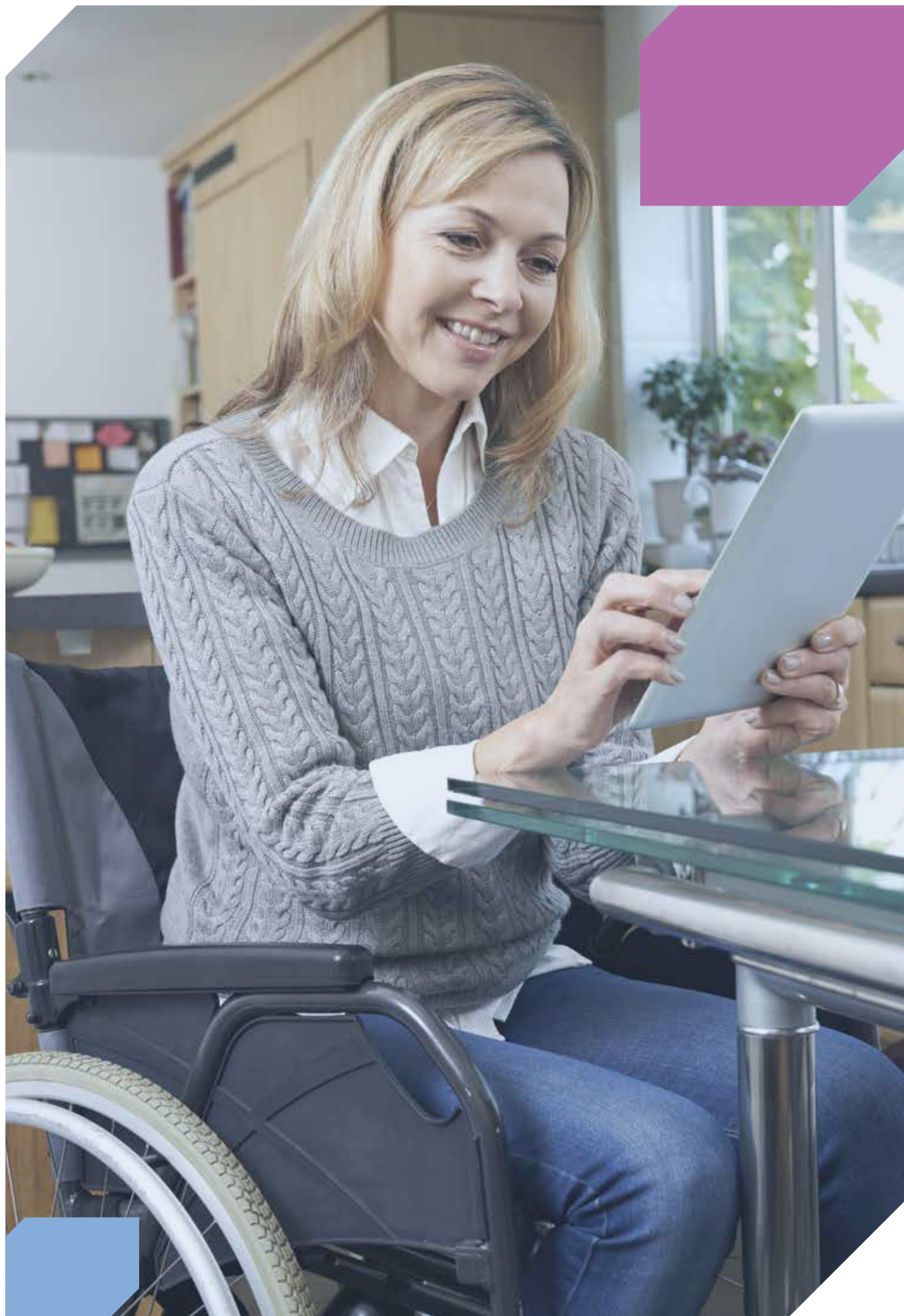
SATISFACTION WITH CURRENT ACCOMMODATION



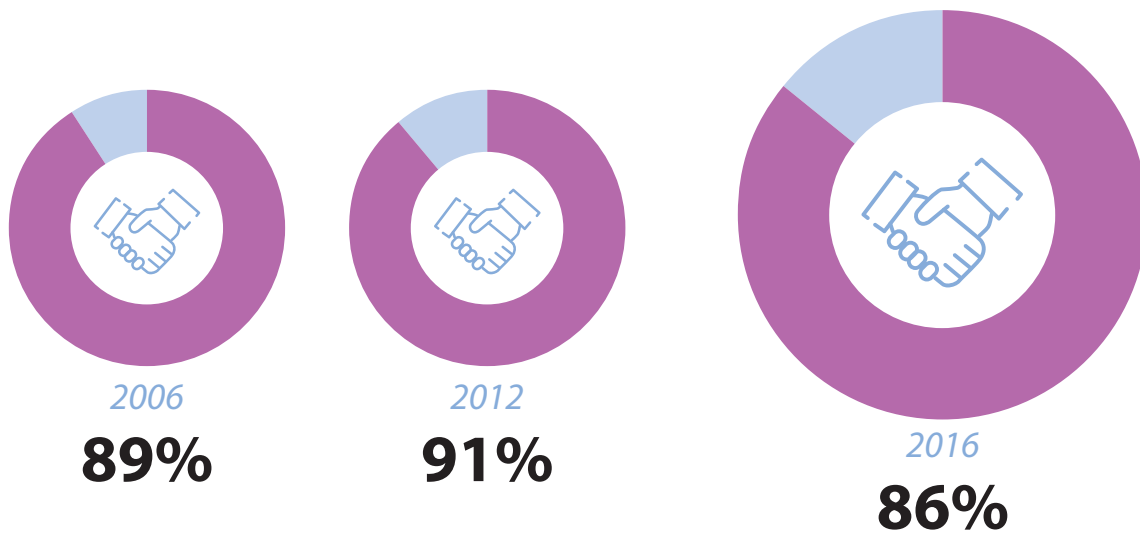
83%
**WERE SATISFIED WITH THEIR
CURRENT ACCOMMODATION^[17]**
(92% in 2012)

COMPARING CURRENT ACCOMMODATION TO PREVIOUS ACCOMMODATION		
	BETTER	WORSE
Location	58%	12%
Size	49%	22%
State of repair	45%	21%

[17] % change between 2016 and 2012 is statistically significant



RELATIONSHIP WITH THE LANDLORD/LETTING AGENT



DESCRIBED THEMSELVES AS BEING ON GOOD TERMS WITH THEIR LANDLORD/LETTING AGENT

Similarly, UK-wide research published in 2017 reported that 84% of landlords said they had a good relationship with their tenants.^[18]

76% of those who took part in the Private Tenants Survey said they were satisfied with the way their landlord/letting agent dealt with repairs and maintenance. (81% in 2012) (67% in 2006)

83% of respondents were satisfied with the services provided by their landlord/letting agent. (88% in 2012) (83% in 2006)

82% of respondents did not feel there were any ways their relationship with their landlord/letting agent could be improved. (92% in 2012) (*% change is statistically significant*) (2006 data not available)

[18] See footnote 15

DOCUMENTS PROVIDED TO TENANTS

Energy Performance Certificate (EPC)

An EPC shows how energy efficient a property is by grading it on a scale from A-G. The certificate must only be issued by an accredited assessor. Since 2008, landlords and letting agents have had a legal obligation to provide tenants with an EPC when moving into a property.^[19]

74% of respondents said they were not provided with an Energy Performance Certificate (90% in 2012). (% change is statistically significant)

Rent book

The Private Tenancies (Northern Ireland) Order 2006 stated that all new tenants must be provided with a rent book, free of charge.^[20]

27% of respondents were provided with a rent book (27% in 2012 and 27% in 2006), and in the vast majority of cases, the rent book was provided free of charge.

Tenancy agreement

A tenant's right to a written tenancy agreement is dependent on the length of their tenancy when they first move into a property; only if a tenancy is for more than 12 months must a written tenancy agreement be provided.^[21]

77% of all respondents had a written tenancy agreement (68% in 2012) (62% in 2006) (% change between 2006 and 2016 is statistically significant).

In 2016, almost all of these respondents had signed their tenancy agreement and were provided with a copy of the agreement.

While the numbers are small, the 2016 findings indicate that the majority of respondents, whose tenancy was for more than 12 months when they first moved into their current accommodation, had a tenancy agreement.

As was the case with the type of documents provided to tenants, the amount of information included in these documents in 2016 varied widely.^[22]



17%

**HAD ONLY A VERBAL
TENANCY AGREEMENT**

(25% in 2012) (30% in 2006)^[22]

[19] NI Direct (2017) Energy Performance Certificates.

<https://www.nidirect.gov.uk/articles/energy-performance-certificates>

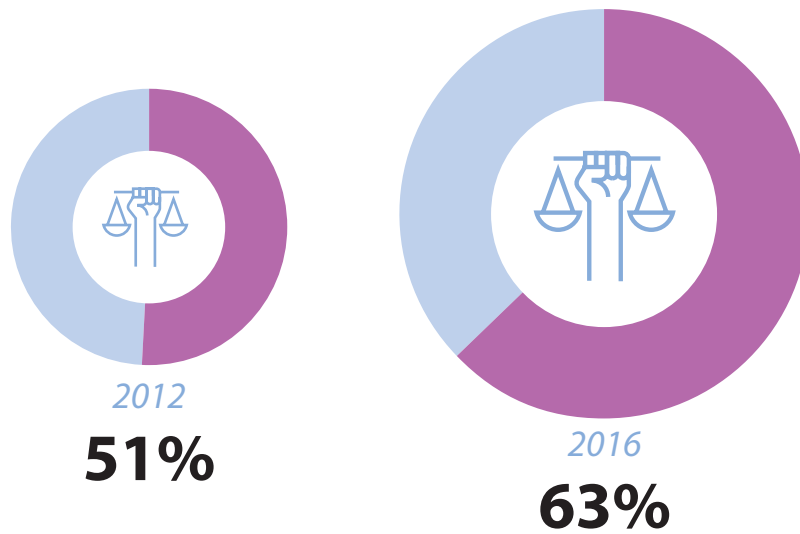
[20] NIHE (2017) A brief guide to renting in the private sector. https://www.nihe.gov.uk/a_brief_guide_to_renting_in_the_private_sector.pdf

[21] NI Direct (2017) Private Rent and Tenancies.

<https://www.nidirect.gov.uk/articles/private-rent-and-tenancies>

[22] % change between 2006 and 2016 is statistically significant

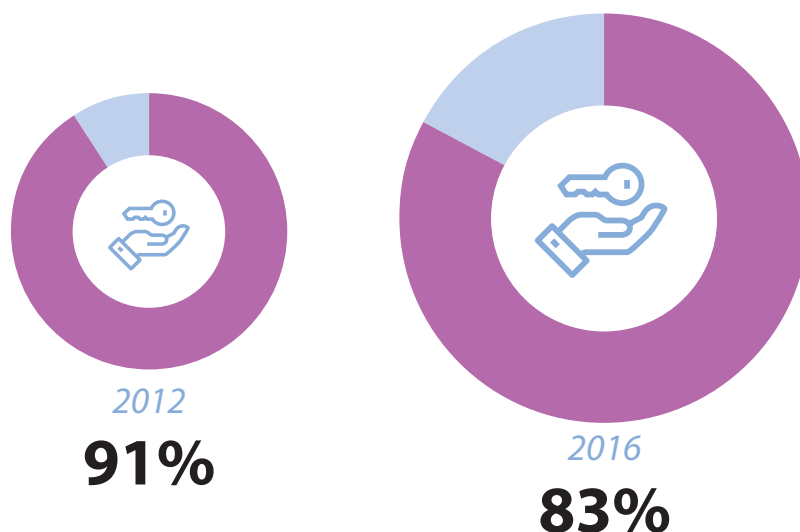
RIGHTS AS A TENANT



KNEW WHERE TO GO FOR INFORMATION ABOUT THEIR RIGHTS AS A TENANT

The main sources for information that respondents cited in 2016 were the Citizen's Advice Bureau, the internet and the Housing Executive.

SECURITY OF TENURE



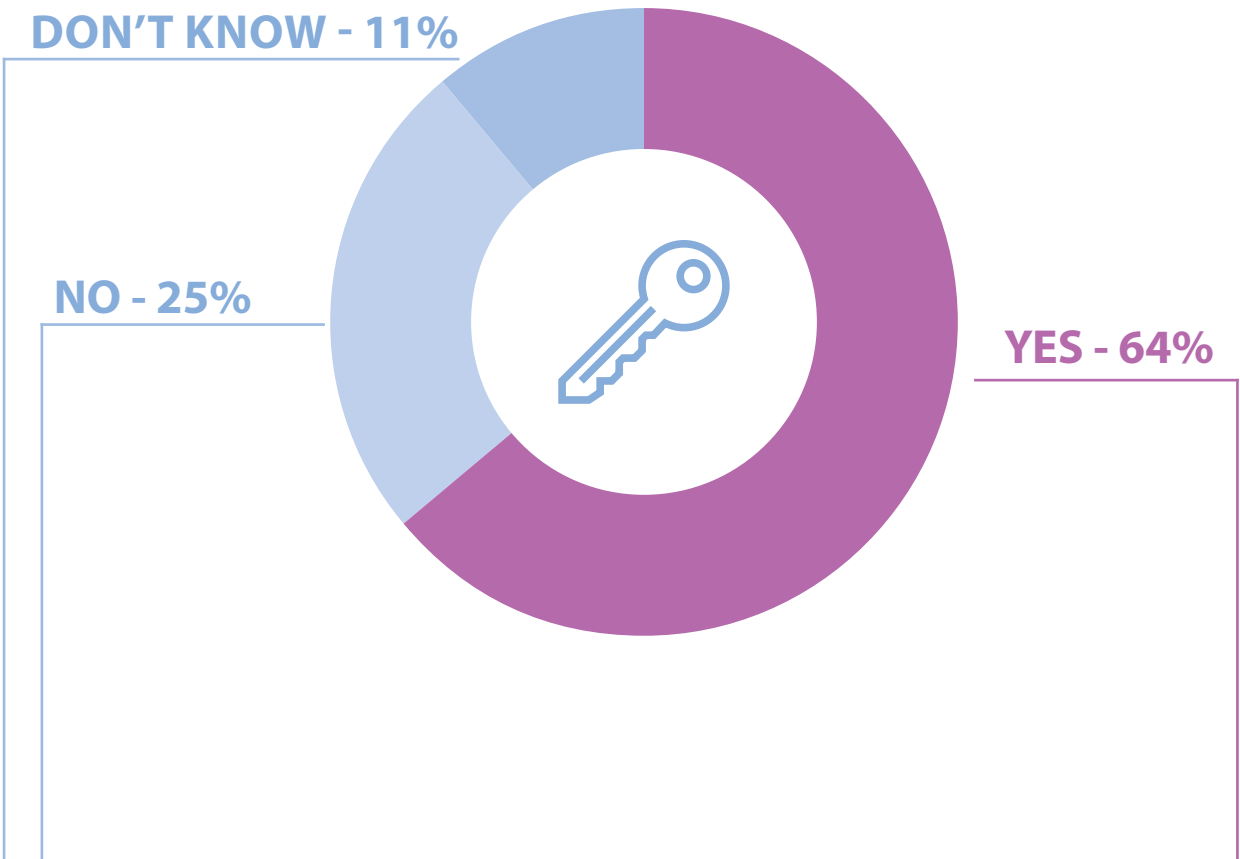
SAID THEY EXPECTED TO BE ABLE TO STAY IN THEIR PROPERTY FOR AS LONG AS THEY WANTED

(Please note this figure has been generated by combining findings from two questions, to give a broad indicator of security of tenure. Responses to these questions in 2016 are included in tables 130 and 131 of the 2016 tabular report).

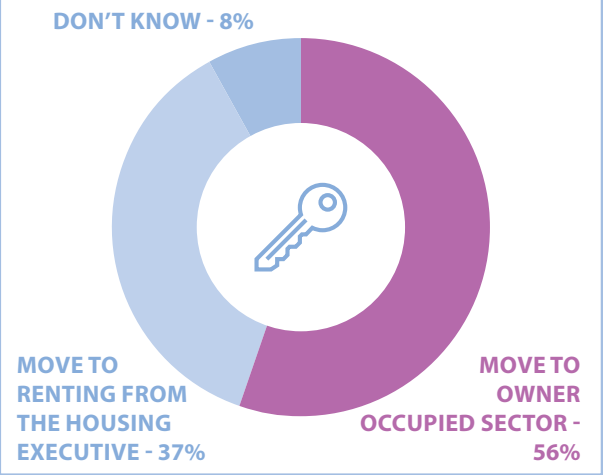


FUTURE INTENTIONS

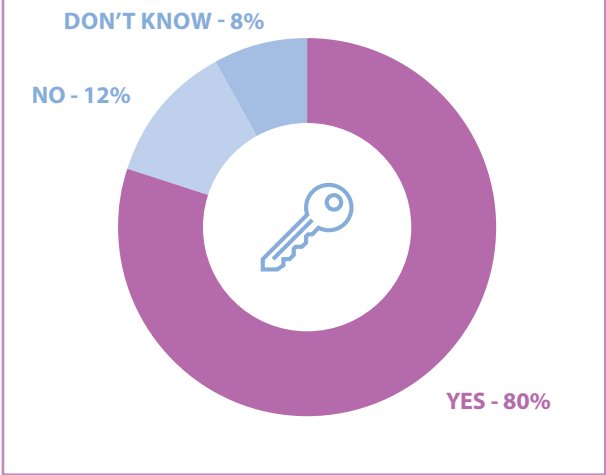
DO YOU INTEND TO STAY IN THE PRIVATE RENTED SECTOR FOR THE NEXT FIVE YEARS?



WHAT ARE YOUR FUTURE INTENTIONS FOR THE NEXT FIVE YEARS?



DO YOU INTEND TO STAY IN THIS PROPERTY FOR THE NEXT FIVE YEARS?



SOME COMMENTS MADE BY RESPONDENTS ON THE ADVANTAGES OF LIVING IN THE PRIVATE RENTED SECTOR

It's a laid back and easy option

(Male, 21)

Waiting list too long – better locations available in private rent sector than in social sector

(Female, 28)

Can access properties in area where you want to live

(Male, 30)

Waiting lists for social housing, can't get mortgage

(Female, 27)

Freedom of choice

(Female, 52)

Can get housed quickly, social waiting list too long

(Male, 66)

Gives time to save for a mortgage/deposit

(Male, 41)

Properties readily available and affordable – no real experience of anything else

(Male, 53)

Less stress than NIHE/HA accommodation

(Male, 27)

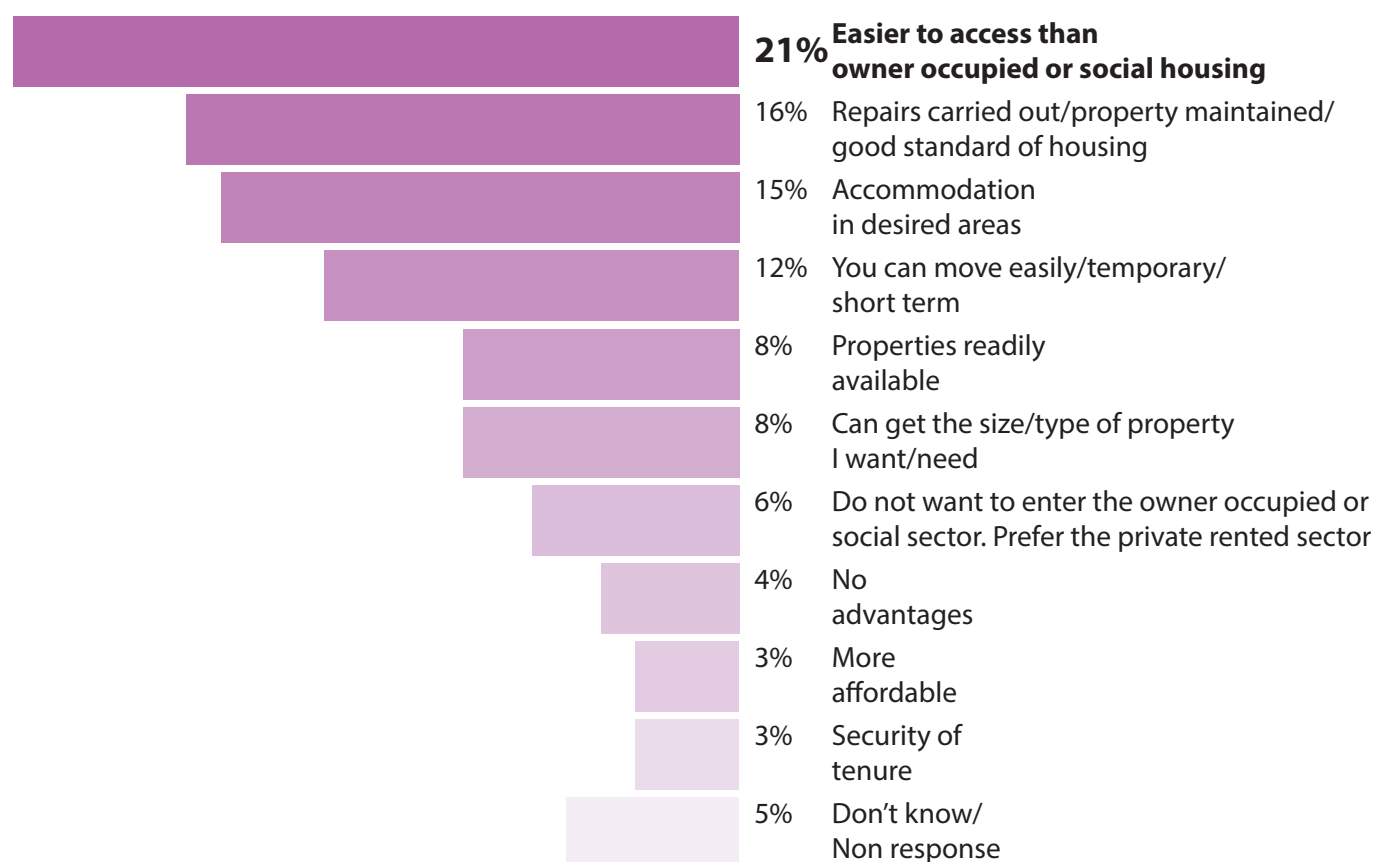
DESIRABILITY OF THE PRIVATE RENTED SECTOR

64% said private rented housing is less desirable than owning your own home (55% in 2012) (50% in 2006) (% change between 2006 and 2016 is statistically significant)

31% said private rented housing is more desirable than social housing (47% in 2012) (48% in 2006) (% change between 2006 and 2016 and 2012 and 2016 is statistically significant)

31% said private rented housing is less desirable than social housing (16% in 2012) (31% in 2006) (% change between 2016 and 2012 is statistically significant)

Advantages of living in the private rented sector



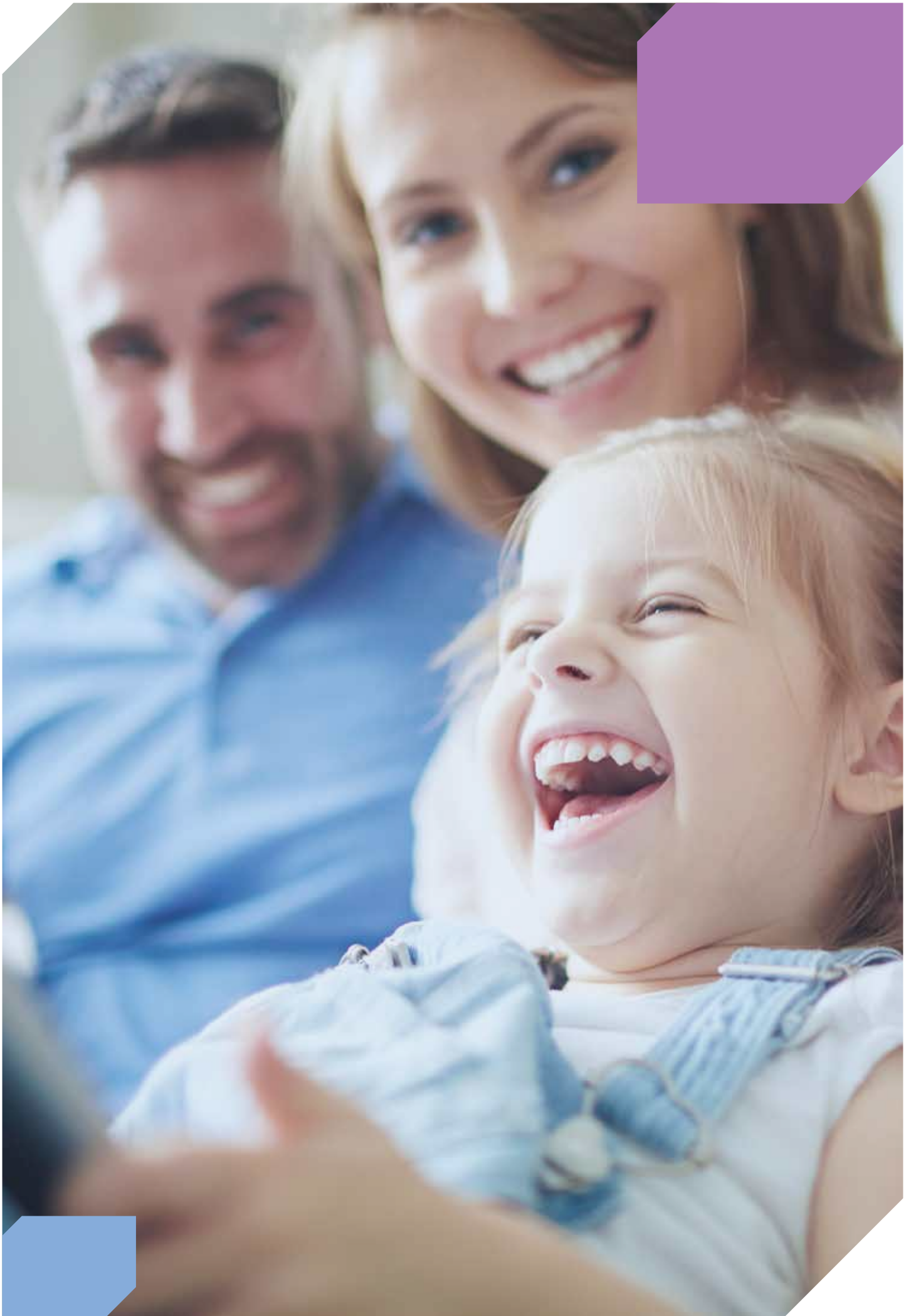
SHARED COMMUNITIES

Although the numbers are small, the 2011 HCS revealed that above average proportions of people living in the private rented sector lived in mixed religion households. *Please note the tenure type is 'Private Rented and Others' and the religion category is 'Mixed/Other/None.'*^[23] Questions on shared communities were included to gather respondents' views on integration and community spirit in their area.

77% said they, or members of their household frequently mix with people from different community /religious backgrounds.

73% said the level of community spirit in their local area was very good/good.

[23] See footnote 7



REGULATING THE PRIVATE RENTED SECTOR

Recognising the growing size and importance of the private rented sector and the role it plays in meeting housing need for a diverse range of people and households, the Department for Social Development renamed the Department for Communities, in consultation with a wide range of stakeholders, have maintained an active role in reviewing the sector and related policy and legislation in recent years. The private rented sector strategy, Building Strong Foundations, was the catalyst for the introduction of the Tenancy Deposit Scheme and the Landlord Registration Scheme in Northern Ireland.^[24]

A further review (Review of the Role and Regulation of the Private Rented Sector) was launched by the Department in November 2015 and culminated in a consultation document (Private Rented Sector in Northern Ireland – Proposals for Change) which was published in January 2017. This consultation document had a focus on the future of the sector and how best to support it.^[25] The collapse of the Northern Ireland Assembly in January 2017 has delayed the Government's response to this consultation.

The continuing demand for private rented housing and tenants using the sector as a longer term housing option means that the sector must be sustainable and that policy makers must be responsive to the issues facing the sector.

Many individuals invested in buy-to-let properties during the rising housing market in the run-up to the global financial crisis of 2007. In other cases, the fall in house prices following the crisis, the increasing prevalence of negative equity, and reduced availability of mortgages created 'accidental landlords'. These trends are borne out in the relatively small-scale operations of most landlords in Northern Ireland; the vast majority (84%) of those who have registered through the Landlord Registration Scheme own only one or two properties. This figure suggests that most are not full-time landlords, and that they are likely to have varying degrees of experience and expertise, resulting in variable levels of professionalism in the sector and highlighting the need for regulation to help improve consistency of approach.^[26]

Overall, regulation aims to make the sector a more attractive housing option for both landlords and tenants; this is vital given the role the sector plays in meeting housing need. Regulation strives to create a sector that functions well, creating the right balance of protecting both landlords and tenants. Regulation aims to professionalise the relationship between landlords and tenants and improve each party's knowledge of their roles and responsibilities. For tenants, regulation boosts standards and increases their confidence. It also incentivises landlords and letting agents to improve.

This Survey examined tenants' views of both existing and possible regulatory schemes.

[24] NIHE (2015) *Northern Ireland Housing Market: Review and Perspectives 2015-2018*. Belfast: NIHE

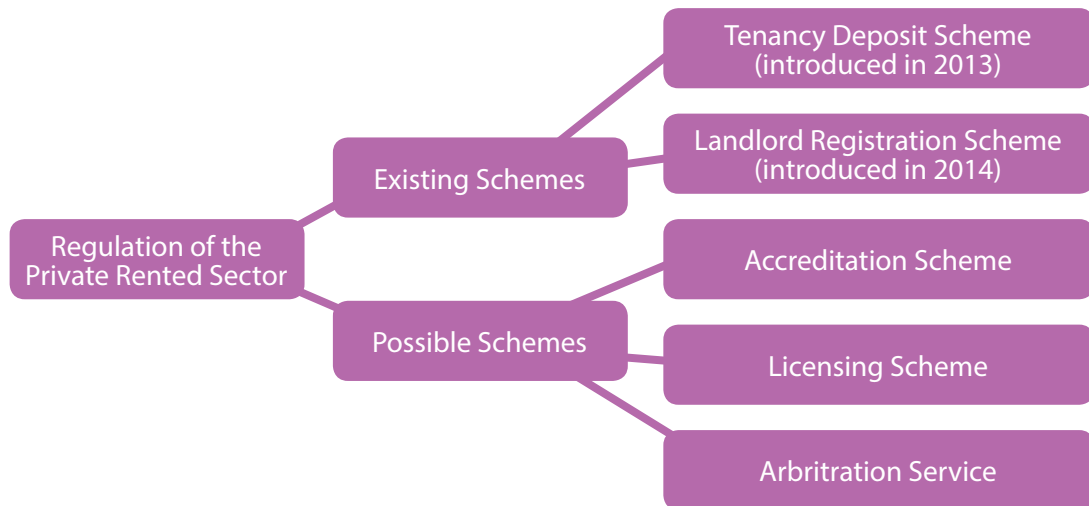
https://www.nihe.gov.uk/northern_ireland_housing_market_perspectives_2015-2018.pdf

[25] Department for Communities (2017) *Private Rented Sector in Northern Ireland - Proposals for Change*. Belfast: DfC

<https://www.communities-ni.gov.uk/sites/default/files/consultations/communities/private-rented-sector-proposals-for-change-consultation.pdf>

[26] See footnote 25

REGULATING THE PRIVATE RENTED SECTOR



Awareness of existing schemes

60% did not know what a tenancy deposit scheme was.

67% had not heard of the Landlord Registration Scheme.

Views on possible future schemes

79% said there should be an accreditation scheme for landlords

76% said there should be an accreditation scheme for letting agents

78% said there should be an accreditation scheme for tenants

60% said there should be a licensing scheme for landlords and letting agents

88% said there should be an arbitration service to deal with landlord/tenant disputes

CONCLUSION

This Survey has provided an insight into tenants' experiences of living in the private rented sector. It has provided updated figures, building upon previous surveys carried out in 2012 and 2006. The 2016 HCS provided a robust sample frame, enabling research to be carried out on an important sector of the housing market, and one that has been traditionally difficult to access.

Survey findings revealed a high proportion of respondents paid an upfront cost to secure their accommodation. While the majority of respondents were responsible for paying all, or part, of their rental charge, three in five respondents received Housing Benefit. The impact of Welfare Reform on private tenants will be significant, generating the need for continued research in this area.

Generally high levels of satisfaction were reported with both the accommodation and the services provided by the landlord/letting agent. However there were relatively low levels of awareness of existing regulatory schemes (Tenancy Deposit Scheme and Landlord Registration Scheme). A large proportion of respondents believed further regulation within the sector was needed. Approximately one in five respondents had not been provided with a rent book or tenancy agreement, although this proportion has fallen since 2006 and 2012.

The majority of respondents expected to be able to stay in their property for as long as they wanted, with three out of five intending to remain in the private rented sector for the next five years. Difficulty accessing other tenures was reported as one of the main reasons for renting privately. The 2016 HCS report is due to be published in spring 2018. Following this, further analysis of data from the Private Tenants Survey will be carried out, looking at survey results by household characteristics.

ABOUT THE HOUSING EXECUTIVE'S RESEARCH UNIT

As the strategic housing authority in Northern Ireland, the Housing Executive has a statutory responsibility to regularly examine housing conditions and need, and may also conduct or promote research into any matter relating to any of its functions.

Research undertaken by the Housing Executive informs the organisation's corporate and business plans, provides an evidence base for decision making, assists in the evaluation and impact assessment of policies and strategies and feeds into broader collaboration with other research and housing organisations across the UK.

The Housing Executive's research programme is drawn up in consultation with key internal and external clients and stakeholders. In keeping with the strategic and enabling role performed by the Housing Executive, the research programme looks at a range of issues including and beyond those relating to its landlord function, and seeks to inform data and evidence needs across all tenures.

As such, the research programme comprises both surveys and analysis carried out in-house and commissioned work undertaken by independent experts and social/market research companies, where a larger fieldwork resource is required. The various discrete research projects can be grouped into four broad strands of work: strategic, customer, technical and supporting vulnerable people.

Good quality data and research evidence is extremely important in shining a light on important issues. Decisions need to be evidence based, particularly at a time when resources are scarce.

For more information on the Research Unit please visit:
https://www.nihe.gov.uk/index/corporate/housing_research.htm