RTB
Bord um Thionóntachtaí Cónaithe
Residential Tenancies Board

Tenant, Landlord and Letting Agent Research 2023
Technical Appendix

December 2023

Contents

Introduction

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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.

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 rented sector in Ireland.

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 programme of research included a nationally representative survey of tenants living in the private rented sector and a representative survey of small and medium private landlords. An online survey was conducted amongst residential letting agents. Qualitative research included focus groups with private renters and small landlords who had left the sector. It also included in-depth interviews with medium and large landlords and letting agents.

The first wave of the research project began in September 2019 and was completed in December 2020. Like many research projects during 2020, the project was impacted by the Covid-19 pandemic. The stages of the research that ran into the latter half of 2020 were used to capture the impact of the pandemic on some landlords and letting agents.

The second wave of the research 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.

The fieldwork dates for the research were as follows:

	Wave 1: 2019/2020	Wave 2: 2022/23
Tenants	Survey: September 2019-March 2020 Focus groups: November-December 2020	Survey: October 2022-February 2023 Focus groups: July 2023
Small landlords (1-2 properties)	Survey: February-May 2020	Survey: April-June 2022
Former small landlords who exited the sector	Survey: February-May 2020	Survey: April-June 2022
Former small landlords who increased properties to 3+	Survey: February-May 2020	Survey: April-June 2022
Medium landlords (3-20 properties)	Survey: September-November 2020	Survey: June-August 2022
Medium landlords (21-99 properties)	In-depth interviews: November-December 2020	In-depth interviews: September-October 2022
Large landlords* (100+ properties)	In-depth interviews: November-December 2020	In-depth interviews: September-November 2022
Letting Agents	Survey: December 2020 In-depth interviews: November-December 2020	Survey: September-October 2022 In-depth interviews: November 2022

Additional interviews were carried out with large landlords in Q4 2021.

The research was conducted by Amárach Research. The project was led by Gerard O'Neill, Chairman. Michele Cluskey, Associate Director, was responsible for the day-to-day project management. Michael McLoughlin, Chief Executive, assisted with the qualitative research.

The research also benefited from the input of the RTB Research Team and the Research Committee.

This report provides details of key technical features of the 2022/23 research study. Each section of the report covers a specific element of the research programme. Details are also provided where the methodology was adapted during the project. These changes include increasing the minimum quota on apartments in the tenant survey, conducting additional reduced surveys with small landlords who had left the sector and were no longer operating as landlords and conducting additional reduced surveys with small landlords who had increased their portfolio to three properties or more.

If you have any queries about the report or would like any information, please contact research@rtb.ie.

Private Tenant Research

2

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.

2.1   Nationally Representative Survey of Private Renters

This section provides details of the nationally representative survey of private renters.

Methodology and Sampling Approach

The survey was carried out face-to-face using a Computer Aided Personal Interviewing (CAPI) methodology.

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 rented sector[1]. 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 tenancies[2]. Within Dublin, sampling points were spread to represent the four local authorities – Dublin City, Dun Laoghaire-Rathdown, Fingal and South Dublin. Regional quotas were set based on the tenancies by local authority file provided by the RTB (Appendix I).

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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)

All quotas were electronically programmed into the survey controls.

The Pobal HP Deprivation Index[3] 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).

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 2016 CSO estimates[4], 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%)[5]. The proportion of tenants on rental assistance was closely monitored throughout fieldwork. Weekly field reports were provided and regular 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 tenants. 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.

All respondents were aged 19+ and responsible for paying rent at the property.

During face-to-face fieldwork, a number of quality procedures were followed to minimise levels of non-response:

▶ Interviewers were trained to the highest quality standards as per MRS codes of practice.

▶ Interviewers were fully briefed by the Research Team to ensure they were aware of any issues which may arise on the project.

▶ Potential participants were assured of the confidentiality of their data.

▶ Interviewers created a welcoming and relaxed environment for the participant.

▶ Interviewers conducted the survey in a polite and professional manner.

▶ Respondents were given contact details of the Fieldwork Manager should they wish to confirm the validity of the study.

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 as indicated in Table 2.1.

The 2019/20 research achieved a total sample of 1,038 face-to-face surveys across 130 sampling points. The target sample was 1,200 surveys but fieldwork was cut short due to restrictions imposed by the Covid-19 pandemic. The margin of error was 2.94% at a 95% confidence interval.

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

4 https://www.cso.ie/en/releasesandpublications/ep/p-tah/tenureandhouseholdsinireland2016-2019/demography/

5 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/

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%

Survey Instrument

The main survey instrument for the tenant survey was designed by Amárach with input from the RTB Research Team and project steering group. The survey was then scripted for data collection on CAPI (Computer Assisted Personal Interviewing) devices.

The script used in the 2022/23 survey was broadly similar to that used in the previous research to facilitate the comparison of results. Any changes that were made to the 2022/23 script were done in collaboration with the RTB Research Team.

To maintain efficient fieldwork and reduce respondent burden, the length of the tenant survey was recommended not to exceed 20-25 minutes.

Instrument design and programming the data collection instrument.

Amárach's internal review ensured that the survey and its constituent questions were user-friendly and facilitated respondent understanding, thus increasing data quality. The review evaluated the survey questions for potential problems that may adversely affect data quality. This included using specific but concise wording, being mindful of the overall survey duration, creating questions, response choices, and skip logic that was easy to follow, administer, and understand. It also involved consideration of issues that might arise for interviewers.

This systematic and formal method of evaluation did not require fieldwork. The review was carried out in-house by members of the Amárach research and field team and included potential solutions to identified problems and recommendations for questions which required pre-field testing and further development.

Below details the survey testing protocol used:

Table 2.2: **Structured testing protocol for the instrument**

Routing	A check that respondents follow the correct path through the survey based on their individual answers to survey questions.
Error checks	A check that invalid combinations or out of range responses trigger appropriate error messages, and that the messages are comprehensible and free from spelling mistakes.
Missing data	A check on the routing for any 'Don't Know' or 'Refused' responses, as well as checking to ensure that missing data is/is not allowed as specified.
Fed-forward data	A check to ensure that question fills are fed-forward as expected and displayed correctly on screen.
Screen displays	A check to ensure that the screen displays accord with standard format with respect to question design and instruction and that there are no spelling or grammatical errors.

Pilot

A smaller pilot study was undertaken for the second wave of the quantitative research.

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

The pilot study was also used to test the sampling procedure, the survey administration and functionality.

Sampling Procedure

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

Table 2.3: **Sampling point selection process**

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

Selecting Sampling Points

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

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

Stage 1: Selection of sampling points

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

Stage 2: Selection of starting address within sampling points

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

Stage 3: Selection of the individual for interview

When contacting the household, the interviewer sought an adult resident aged 19 years or older with whom to complete the screening questions. In order to qualify, interviewees had to be paying the rental costs associated with the property – either solely or jointly. Prior to the survey taking place, informed consent[6] was sought from the person taking the interview. Once this individual was identified and had provided consent, the interviewer proceeded with the survey.

For all sampling points every third address was contacted. Only one respondent per address was surveyed.

Unfinished surveys did not count towards the quota.

Mainstage Survey Responses

At the beginning of the survey respondents were asked 'Can I confirm, you are currently a tenant in this property and pay rent?'. If their response was 'yes' they were able to continue with the survey. If their response was 'no', they were not able to take part in the survey and their response was treated as ineligible.

Weighting

While all efforts were made to achieve a wholly representative survey sample (using quota controls), some variables were weighted to proportionately represent the population of those living in the private rented sector.

Table 2.4 summarises responses by the age, gender and location (region) of respondents, comparing the target sample and the achieved response. Subsequent weighting of the survey data addressed any small variations in responses.

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6 Potential respondents were given an information sheet about the survey. Before proceeding with the survey, eligible respondents were required to provide a full name and telephone number. This information was collected on the CAPI device and acted as consent to the survey as per Amárach's GDPR guidelines.

Table 2.4: **Sample – Target vs Achieved**

	Target (N=1200)	Achieved (unweighted) (N=1200)
Age		
Young adults 19-24 years	13%	12%
Persons aged 25-34 years	43%	41%
Persons aged 35-44 years	27%	29%
Persons aged 45-54 years	10%	13%
Persons aged 55-64	6%	5%
Persons aged 65+	1%	1%
Gender		
Male	50%	48%
Female	50%	52%
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%	22%
Dún Laoghaire-Rathdown	5%	5%
Fingal	6%	7%
South Dublin	5%	5%

Analysis

Before analysis and coding began, rigorous quality checks and validations were carried out. During this process all edits and checks were recorded in accordance with ISO 20252 (data quality management protocol) and MRS guidelines.

Amárach coordinated with the RTB Research Team to address complex issues such as nonresponse, data imputation and appropriate editing.

A series of derived variables were produced and checked. These included the banding of raw variables such as the total rent paid on the property and the percentage of monthly net income (after tax) that goes towards rent on a monthly basis.

The CAPI survey script had numerous quality checks in place, for example to restrict implausible value ranges such as rent/deposit/top-up amounts, or to prevent respondents selecting mutually exclusive answers. However, some additional data cleaning was required.

A full statistical analysis of results was provided. Data analyses included frequencies, cross tabulations and other outputs (calculations such as mean and median) designed to examine and understand the data collected.

In the cross tabulations the sample was broken down by a number of variables including age, socio-economic group, citizenship, region, whether living in a rent pressure zone, length of time renting in total, rental assistance and property type.

2.2 Qualitative Research

This section provides details of the qualitative research that was conducted with tenants living in the private rented sector.

A qualitative tenant research programme was 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. They included a mix of long-term and short-term private renters:

▶ Two general tenant focus groups – one with tenants renting in Dublin and another with tenants renting outside Dublin.

▶ One with Non-Irish Nationals living in the private rented sector.

▶ One with private renters on rental assistance.

Table 2.5: Qualitative Research Sampling Matrix for Focus Groups

Group	Region	Tenure type	Age	Nationality
1	Dublin	Private Renters	19-54	Irish
2	Ex-Dublin	Private Renters	19-54	Irish
3	All RoI	Private Renters	19-54	Non-Irish
4	All RoI	Private Renters on Rental Assistance*	19-54	Irish/non-Irish

Note: In 2019/20 group 4 consisted of older renters aged 45+. As older renters aged 45+ represent quite a small cohort (17% of all private renters), it was decided to replace this group with a group of tenants on rental assistance (Housing Assistance payment (HAP) or Rent Supplement).

Group participants were recruited from the Amárach Research Panel to join the focus group discussions which were conducted via Zoom video-conferencing service in July 2023 after the main tenant survey. Using Zoom enabled a diverse range of locations to be included. There was a broad framework for discussion at each group. In addition, differences that were identified in the survey results between 2019/20 and 2022/23 were explored in more detail in the focus groups.

All respondents who participated were privately renting a property from a landlord when the group discussion took place.

Each group lasted for 90 minutes. All four focus groups were moderated personally by Michael McLoughlin, Chief Executive of Amárach Research. They were recorded and analysed in accordance with Amárach's ISO procedures. Members of the RTB Research Team were invited to view the groups personally.

An incentive in the form of a €50 voucher was given to group participants in appreciation of their time.

Small Landlord Research

3

This section provides details of the methodology adopted in the 2022 small landlord (1-2 properties) research.

As was the case in the 2020 research, the methodology consisted of both quantitative and qualitative elements. The main quantitative element was a nationally representative telephone survey of 500 small landlords. Small landlords were defined as those who currently own between one and two properties which they let out to tenants.

The methodology was adapted in 2022 to include additional shorter surveys with (a) landlords who had left the sector and (b) with landlords who had increased their portfolio to three properties or more.

The qualitative element consisted of one thematic focus group with small landlords who had left the sector.

Table 3.1: **Small Landlord Research 2022**

	Quantitative Element	Qualitative Element

Small landlords (1-2 properties)	Nationally representative telephone survey of 500 small landlords (2020 and 2022).
	
	Additional shorter surveys were carried out as follows:
	
	▸ Landlords who had left the sector:
	  – 2022 x 100 surveys
	  – 2020 x 74 surveys
	▸ Landlords who increased their portfolios to three properties or more:
	  – 2022 x 80 surveys
	  – 2020 x 66 surveys
		One focus group with small landlords who have left the sector (2020 and 2022).

3.1 Nationally Representative Survey of Small Landlords (1-2 properties)

This section provides details of the nationally representative survey of small landlords (1-2 properties). The same quantitative methodology was employed to conduct both the 2020 and 2022 surveys.

Methodology and Sampling Approach

Computer Aided Telephone Interviewing (CATI) was used to conduct the surveys for the quantitative elements of the private landlord research. CATI represented the most effective and appropriate interviewing methodology for contacting landlords. From previous experience of interviewing businesses, Amárach Research has found that this cohort can be hard to contact due to busy schedules. CATI interviewing was therefore ideal as it allowed for call-backs to be scheduled at times most suitable to landlords. All interviewers were supervised, and their progress was tracked on a daily basis.

Leads for contacting private landlords were provided by the RTB from the RTB register of private tenancies. The leads were provided in random batches of 200 as only a small proportion of the total number of small landlords registered would be called over the duration of fieldwork. Prior to commencing fieldwork, each batch of leads was coded by region (Dublin, rest of Leinster, Munster and Connacht/Ulster) and whether the tenancy was located inside/outside a Rent Pressure Zone (RPZ).

The RTB contacted landlords by email up to two weeks in advance to inform them that they may receive a telephone call from Amárach Research asking them to take part in the research. The email outlined the purpose of the research, that they may be contacted and the importance and confidentiality of their input. Amárach asked landlords for their consent when they contacted them by telephone.

In order to manage non-response during fieldwork the outcome for each telephone call was recorded and the database was monitored throughout.

▸ Each respondent was called a minimum of 4 and a maximum of 10 times unless a definite appointment was made, or they were identified as outside target (e.g. a respondent with three properties in the small landlord survey).

▸ The CATI team worked six days a week, 9am-9pm Monday to Friday and 10am-2pm on Saturday.

▸ All CATI team members were trained as per MRS codes of practice.

The CATI sample of 500 small landlords (1-2 properties) was representative in terms of region and number of tenancies.

Quotas were set for the 2022 survey based on the number of tenancies as shown in Table 3.2.

Table 3.2: **Segmentation of Landlord Data by Number of Tenancies[7]**

No of Tenancies	Individual Roles	Company Roles	Total Landlords	% of Landlords
1	112,594	3,703	116,297	70.17%
2	26,235	948	27,183	16.40%

Quotas were also set based on the number of registered tenancies in each county where the landlord provided contact details and agreed to be contacted as shown in Table 3.3.

7 Registration of Tenancies: Jan 2020

Table 3.3: **Segmentation of Landlord Data by County**[8]

County	Private Tenancies	
Carlow	3,200	1.06%
Cavan	3,024	1.00%
Clare	4,666	1.55%
Cork	36,336	12.06%
Donegal	6,022	2.00%
Dublin	121,236	40.24%
Galway	17,186	5.70%
Kerry	7,533	2.50%
Kildare	11,252	3.73%
Kilkenny	4,209	1.40%
Laois	3,639	1.21%
Leitrim	1,557	0.52%
Limerick	11,710	3.89%
Longford	2,401	0.80%
Louth	6,647	2.21%
Mayo	6,008	1.99%
Meath	7,703	2.56%
Monaghan	2,092	0.69%
Offaly	3,165	1.05%
Roscommon	2,876	0.95%
Sligo	4,372	1.45%
Tipperary	6,806	2.26%
Waterford	7,924	2.63%
Westmeath	5,808	1.93%
Wexford	7,680	2.55%
Wicklow	6,257	2.08%
	301,309	

All quotas were electronically programmed into the survey controls.

Fieldwork for the 2022 small landlord survey was carried out over an eleven-week period between 4th April and 17th June 2022.

Fieldwork for the 2020 small landlord survey was carried out between February and May 2020.

Both surveys achieved 500 successful CATI interviews with small landlords (1-2 properties). The margin of error was 4.38% at a 95% confidence interval.

8 Registration of Private Tenancies: end 2020

Additional short telephone surveys with small landlords

Additional short telephone surveys were conducted as follows:

▶ Eighty (80) landlords owning 3+ properties. These landlords increased the number of rental properties that they were associated with. These short interviews were conducted to identify the reasons why they increased the number of rental properties and to explore their intentions with regard to purchasing more rental property in the future. In 2020 there were sixty-six (66) short telephone surveys carried out with landlords owning 3+ properties.

▶ One hundred (100) landlords who left the sector and were no longer operating as landlords. These former landlords previously let out either one or two properties but have now ceased to be landlords. These short interviews were conducted to identify the reasons that they no longer operate as a landlord in the sector. In 2020 there were seventy-four (74) short telephone surveys carried out with landlords who left the sector.

Survey Instrument and Pilot

The main survey instrument for the small landlord survey was designed by Amárach with input from the RTB Research Team and project steering group. The survey was then scripted for data collection on CATI (Computer Aided Telephone Interviewing) using the international industry standard software Voxco.

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

A smaller pilot study was undertaken for the 2022 survey. A total of 10 pilot interviews were undertaken by CATI to test the script changes. These pilot interviews were spread by region and inside/outside rent pressure zones to ensure that a representative sample was achieved.

Results from the pilot were also used to check the length of the survey and to inform the main stage interviewer briefings.

To maintain efficient fieldwork and reduce respondent burden, the length of the main small landlord survey was recommended not to exceed 20-25 minutes.

Amárach employed the same systematic and formal method to the survey design and evaluation to ensure the accuracy of the survey instrument as outlined in section 2.1 of the private tenant research.

Mainstage Survey Responses and Weighting

A total of 2,411 leads were provided for the main 2022 small landlord survey. The target sample of 500 surveys was achieved.

Table 3.4 summarises responses by region (where tenancies were located) and number of properties, comparing the target sample and the achieved response (unweighted) for the nationally representative survey of small landlords (1-2 properties). The sample achieved was in line with the target sample. Therefore, only minimal weighting of the survey data was required.

Table 3.4: **Nationally Representative Sample – Target vs Achieved.**

	Target (N=500)	Achieved (unweighted) (N=500)
Region		
Dublin	40%	40%
Leinster (excluding Dublin)	21%	21%
Munster	25%	25%
Connacht and Ulster	14%	14%
Number of Properties		
1	81%	81%
2	19%	19%

Analysis

Before coding and analysis began, Amárach employed similar data quality checks and data validations to those outlined in section 2.1 of the private tenant research.

A series of derived variables, similar to those in the 2020 survey, were produced and checked. This included the banding of raw variables such as the total rent paid on each property and the duration of each tenancy.

The CATI survey script had numerous quality checks in place, for example to restrict implausible value ranges such as rent/deposit/top-up amounts, or to prevent respondents selecting mutually exclusive answers. However, some additional data cleaning was required before the analysis stage.

A full statistical analysis of results was provided. Data analyses including frequencies, cross tabulations, and other outputs (calculations such as mean and median) were designed to examine and understand the data collected.

In the cross tabulations the sample was broken down by key variables of interest including age of landlord, region, whether renting in a rent pressure zone and whether one or two properties owned.

In the main survey, data was collected separately for each property owned (for a maximum of two properties) at certain questions (e.g., Q14 Property type(s) let out to tenants). Therefore, the base for analysis at these questions is 'all properties' and the base for analysis at all other questions is "all landlords'.

3.2   Qualitative Research

This section provides details of the qualitative research that was conducted with small landlords. The approach adopted in 2020 and 2022 was methodologically similar.

In December 2020, a mini focus group was conducted with four participants. In July 2022, a second focus group was held with seven participants, all of whom had previously registered a private tenancy with the RTB, but who were no longer landlords. These landlords were identified during the main quantitative survey, and they agreed to take part in follow-up research. They were invited to participate via Amárach's call centre. The group discussion took place via Zoom video-conferencing service thus enabling the recruitment of participants from across the country.

The Discussion Guide used in 2022 was similar to that used in 2020 to allow for comparison of results. Any changes that were made to the 2022 Discussion Guide were done in collaboration with the RTB Research Team.

The focus group lasted for 75 minutes and was moderated by Michael McLoughlin, Chief Executive of Amárach Research. It was recorded and analysed in accordance with Amárach's ISO procedures. Members of the RTB Research Team attended the focus group in an anonymous capacity.

An incentive in the form of a €75 voucher was given to group participants in appreciation of their time.

Medium Landlord Research

4

In addition to small landlords, research was also undertaken with medium landlords. This section sets out the methodology followed in the 2022 medium landlord (3-99 properties) research.

The methodology consisted of both quantitative and qualitative elements, in line with the 2020 research.

The main quantitative element was a nationally representative telephone survey of 250 medium landlords with 3-20 properties.

The qualitative element consisted of ten in-depth telephone interviews with medium landlords owning 21-99 properties.

4.1   Nationally Representative Survey of Medium Landlords (3-20 properties)

This section provides details of the 2022 nationally representative survey of medium landlords (3-20 properties).

Methodology and Sampling Approach

Computer Aided Telephone Interviewing (CATI) was also chosen to conduct the surveys for the quantitative element of the medium landlord research (3-20 properties). The reasons were the same as those given for small landlords (1-2 properties) in section 3.1.

Leads for contacting the medium landlords (3-20 properties) were provided by the RTB from the RTB register of tenancies. The leads were provided in random batches of 200 as only a small proportion of the total number of medium landlords (3-20 properties) registered would be called over the duration of fieldwork (ten weeks). Prior to commencing fieldwork, each batch of leads was coded by region (Dublin, rest of Leinster, Munster, and Connacht/Ulster) and whether property was located inside/outside a Rent Pressure Zone (RPZ).

Instructions regarding the provision of contact details by the RTB for the medium landlord survey are included in Appendix II.

The RTB contacted landlords by email up to two weeks in advance to inform them that they may receive a telephone call from Amárach Research asking them to take part in the research. The email outlined the purpose of the research, that they may be contacted and the importance and confidentiality of their input. Amárach asked landlords for their consent when they contacted them by telephone.

In order to manage non-response during fieldwork the outcome for each telephone call was recorded and the database was monitored throughout.

The typical definition of a medium landlord ranges from three tenancies up to as many as ninety-nine tenancies. In line with the 2020 research, it was agreed that landlords owning 21-99 properties might behave quite differently to landlords owning 3-20 properties and that landlords owning 21-99 properties would behave more like large landlords (100+ properties). A quantitative approach similar to that used for medium landlords owning 3-20 properties was not considered feasible with landlords owning more than 20 properties due to the volume of data required. Therefore, the quantitative survey focussed on medium landlords with 3-20 properties and qualitative research in the form of semi-structured in-depth interviews was conducted among medium landlords with 21-99 properties.

The CATI sample of 250 medium landlords (3-20 properties) was representative in terms of region and number of tenancies.

In 2022, the main segmentation of data by number of tenancies was based on the most up-to-date data for private landlords with private tenancies provided by the RTB as shown in Table 4.1.

Table 4.1: **Segmentation of Landlord Data by Number of Tenancies[9]**

Landlord size data October 2021	
No. of Tenancies	**% of Landlords**
3	44%
4	20%
5	11%
6	7%
7	4%
8	3%
9	2%
10-20	8%
Total	**100%**

Note: The assumption was made that one tenancy equals one property.

Quotas were also set for the 2022 survey based on the number of registered tenancies in each county where the landlord provided contact details and agreed to be contacted as shown in Table 4.2.

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9 Registration of Tenancies: October 2021

Table 4.2: **Segmentation of Landlord Data by County**[10]

County	Private Tenancies	
Carlow	3,200	1.06%
Cavan	3,024	1.00%
Clare	4,666	1.55%
Cork	36,336	12.06%
Donegal	6,022	2.00%
Dublin	121,236	40.24%
Galway	17,186	5.70%
Kerry	7,533	2.50%
Kildare	11,252	3.73%
Kilkenny	4,209	1.40%
Laois	3,639	1.21%
Leitrim	1,557	0.52%
Limerick	11,710	3.89%
Longford	2,401	0.80%
Louth	6,647	2.21%
Mayo	6,008	1.99%
Meath	7,703	2.56%
Monaghan	2,092	0.69%
Offaly	3,165	1.05%
Roscommon	2,876	0.95%
Sligo	4,372	1.45%
Tipperary	6,806	2.26%
Waterford	7,924	2.63%
Westmeath	5,808	1.93%
Wexford	7,680	2.55%
Wicklow	6,257	2.08%
	301,309	

All quotas were electronically programmed into the survey controls.

Fieldwork for the 2022 medium landlord (3-20 properties) survey was carried out over a ten-week period between 15th June and 26th August 2022.

The research achieved 250 successful CATI interviews with medium landlords (3-20 properties). The margin of error was 6.2% at a 95% confidence interval.

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10 Registration of Private Tenancies: end 2020

Survey Instrument and Pilot

The main survey instrument for the medium landlord survey was designed by Amárach with input from the RTB Research Team and project steering group. The survey was then scripted for data collection on CATI (Computer Aided Telephone Interviewing) using the international industry standard software Voxco.

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

A total of 20 pilot surveys were undertaken by CATI to test the script changes. These pilot surveys were spread by region and inside/outside rent pressure zones to ensure that a representative sample was achieved.

Results from the pilot were also used to check the length of the survey and to inform the main stage interviewer briefings.

To maintain efficient fieldwork and reduce respondent burden, the length of the main medium landlord survey was recommended not to exceed 40 minutes.

Amárach employed the same systematic and formal method to the survey design and evaluation to ensure the accuracy of the survey instrument as outlined in section 2.1 of the private tenant research.

Mainstage Survey Responses and Weighting

A total of 1,500 leads were provided for the main 2022 medium landlord survey. The target sample of 250 surveys was achieved.

Table 4.3 summarises responses by region (where tenancies were located) and number of properties, comparing the target sample and the achieved response (both unweighted and weighted) for the nationally representative survey of medium landlords (3-20 properties).

The survey data was weighted to address small variations in responses by number of properties thus ensuring that a representative sample of medium landlords (3-20 properties) was achieved.

Table 4.3: **Nationally Representative Sample – Target vs Achieved.**

	Target (N=250)	Achieved (unweighted) (N=250)	Achieved (weighted) (N=250)
Region			
Dublin	40%	40%	40%
Leinster (excluding Dublin)	21%	21%	21%
Munster	25%	25%	25%
Connacht and Ulster	14%	14%	14%
Number of Properties			
3	44%	40%	44%
4-5	31%	32%	31%
6-9	17%	19%	17%
10-20	8%	8%	8%

Analysis

Before analysis and coding began, Amárach employed similar quality checks and data validations to those outlined above for other elements of the quantitative research programme.

A series of derived variables, similar to those in the 2020 survey, were produced and checked. These included the banding of raw variables such as the most expensive/lowest rent paid and the longest/shortest tenancy.

The CATI survey script had numerous quality checks in place, for example to restrict implausible value ranges such as rent/deposit/top-up amounts, or to prevent respondents selecting mutually exclusive answers. However, some additional data cleaning was required before the data analysis stage.

A full statistical analysis of results was provided. Data analyses included frequencies, cross tabulations and other outputs (calculations such as mean and median) designed to examine and understand the data collected.

In the cross tabulations the sample was broken down by key variables of interest including region, whether renting in a rent pressure zone, the number of properties owned and number of years as a landlord.

4.2   Qualitative Research

The qualitative element of the 2022 medium landlord research consisted of in-depth telephone interviews with medium landlords owning 21-99 properties. This approach was in line with that taken in 2020 for the same cohort of landlords.

The same approach to recruiting the participants was used in 2022 and 2020. The RTB contacted landlords in this category, informing them of the nature of the study and inviting them to participate. The names and contact details were then passed on to Amárach Research. Amárach's call centre contacted potential participants and once they agreed to participate, a telephone interview was arranged.

In total there were ten interviews completed with medium landlords in Quarter 3 2022. The same number of interviews were completed in 2020. Each interview lasted 60 minutes approximately.

The interviews were conducted by Michele Cluskey, Associate Director of Amárach Research.

The Discussion Guide used in 2022 was similar to that of 2020 to allow for comparison of results. Any changes that were made to the 2022 Discussion Guide were done in collaboration with the RTB Research Team.

Large Landlord Research

5

In addition to small and medium landlords, research was also undertaken with large landlords. This section provides details of the approach taken for the large landlord research.

Qualitative research was undertaken with senior individuals and organisations who are classified by the Residential Tenancies Board as large sized landlords. Under this classification large scale landlords are those landlords that own 100+ residential properties to rent.

In 2022 there were 10 in-depth telephone interviews completed in total with large landlords. They took place in Quarter 4 2022. Prior to the 2022 research there were nine interviews conducted with large landlords in 2020 (Quarter 4) and 12 interviews conducted with large landlords in 2021 (Quarter 4). In total, 31 interviews were conducted with 17 large landlords across the three waves – seven landlords completed one wave, six landlords completed two waves and four landlords completed all three waves of the research. Due to personnel changes within organisations, some landlords were interviewed just once or twice. In February 2021 there were less than 70 landlords with more than 100 tenancies registered with the RTB. This means that a considerable number were interviewed in relation to the total number of large landlords.

A similar approach to interviewing large landlords was used across all three waves of the research. Only senior individuals were interviewed. The interviews were semi-structured, and each interview lasted an average of 60 minutes.

The recruitment process to identify and contact participants was as follows.

1. The Residential Tenancies Board wrote to landlords in this category on its database, informed them of the nature of the study and invited them to participate.

2. Once they agreed and gave permission for contact details to be shared, the names and contact details were passed to Amárach Research.

3. Amárach's call centre contacted the potential participants and arranged for a telephone interview.

The interviews were conducted by Michael McLoughlin, Chief Executive of Amárach Research and Michele Cluskey, Associate Director of Amárach Research.

The Discussion Guide used in 2022 was broadly similar to that of 2020 and 2021 to allow for comparison of results. Any changes that were made to the 2022 Discussion Guide were done in collaboration with the RTB Research Team.

Letting Agent Research

6

In addition to tenants and landlords, research was also undertaken with letting agents. This section sets out the methodology adopted in the 2022 letting agent research.

As was the case in the 2020 letting agent research, the methodology consisted of both quantitative and qualitative elements which were run in parallel. In the quantitative survey, respondents were invited to engage in a qualitative research exercise. Those who opted in were then included in this qualitative exercise.

The main quantitative element was an online survey. A total of 143 letting agents completed the online survey in 2022 and 58 of these agreed to take part in further research. Once again, respondents were randomly selected through this opt-in methodology who agreed to take part in a telephone interview lasting 45-60 minutes. A total of 13 in-depth telephone interviews were completed, in line with 2020.

6.1 Quantitative Research

This section provides further details of the quantitative research carried out amongst letting agents.

Methodology and Sampling Approach

The quantitative research was undertaken among a database of property agents which is publicly available from the Property Services Regulatory Authority (PSRA). The database included a comprehensive list of property agents who operate within the Republic of Ireland and the property activities for which each was licensed.

In 2020 the PSRA database was used to build a list of contacts for letting agents suitable for the survey. Online desk research was carried out to verify contact details (name, position, personal work email address, telephone number etc). Amárach interrogated the database and identified those agents who were licenced to let residential property. In the database provided these were grouped by firm. Given that we were seeking to ascertain the organisation's perspectives on the residential letting market, Amárach sought to identify the agent who was in charge of the residential letting activity in each practice. Other than the name of the organisation, their name of the individual agent and the activities for which they were licenced, no contact details were provided in the database. Each identified eligible agent was then contacted by Amárach's call centre and invited to participate in the research.

The same database of leads was used in in 2020 and 2022. Prior to commencing fieldwork in 2022, the leads were updated to reflect changes made to the PSRA register including the addition of new agents that were added to the 2022 PSRA database since 2020.

In 2020 it was agreed with the RTB that the most effective way of carrying out data collection was using an online methodology. Firstly, the situation prevailing at the time regarding Covid-19 and the level of restrictions in place meant that many owner/director/manager letting agents were working remotely instead of being office based. It was easier and quicker to source personal email addresses rather than personal telephone numbers. Secondly, it was believed that an online approach to data collection would be faster than telephone.

Those who agreed to engage in the quantitative research were asked to provide their personal work email address. No generic email addresses were used in the research. They were then sent an online link via email. When they clicked on the link, they were brought to the survey page, hosted on an Amárach server and they completed the survey online. The approach to surveying in 2022 was the same as 2020 – agents were sent an online link via the email address provided.

This element of the research was completed between September and December 2022. The first wave of the online research was completed in Q4 2020.

Survey Instrument

The main survey instrument for the Letting Agent survey was designed by Amárach with input from the RTB Research Team and project steering group. The survey was then scripted for data collection online using the international industry standard software Voxco.

The survey instrument used in 2022 closely matched that of the previous wave to facilitate like-for-like comparisons. Any changes that were made to the 2022 survey were done in collaboration with the RTB Research Team.

An internal pilot was conducted to check the length of the survey, its administration and functionality.

Mainstage Survey Responses

The main fieldwork for the 2022 letting agent survey was carried out in Q4 2022.

The target sample was 150 surveys (in line with the target for the 2020 survey). A total of 143 letting agents completed the 2022 online survey. This represented a response rate of c.19% on the total eligible database and showed a notable improvement compared to the 2020 survey (81 letting agents completed the survey, a response rate of c.10%).

The recruitment criteria were the same in 2020 and 2022. At the beginning of the survey respondents were asked 'Can I just confirm that you are one of the persons with responsibility for running the residential letting service in this branch?'. If their response was 'yes', they were allowed continue to the next screening question. If their response was 'no', they were not allowed to take part in further questions and their response was treated as ineligible. In addition, when asked the question 'What property services does this branch provide?' respondents had to select 'Residential Letting Agent (including letting management on behalf of a landlord)' to be eligible to continue with the rest of the survey.

The average time taken for completing the 2022 survey was 14.43 minutes. The 2020 survey was slightly longer (average completion time of 18 minutes).

For the 2020 survey, the initial intention was to set regional targets to ensure that the sample was representative of letting agents by region. These regional targets were based on the tenancies by local authority file provided by the RTB. However, given the shortage of available leads, there were no actual quotas set for the 2020 survey. Instead, the responses by region were monitored as fieldwork progressed. A similar approach was followed in the 2022 survey.

Table 6.1 summarises the responses by region (location of letting agent branch), comparing the target sample and the achieved response for the 2020 and 2022 survey of letting agents.

The regional targets were based on the tenancies by local authority file provided by the RTB (Appendix I).

As was the case in 2020, letting agent branches located in Dublin were somewhat under-represented in the 2022 survey. In contrast, letting agent branches in rest of Leinster and Munster were slightly over-represented. Overall, the regional profile was broadly similar in 2020 and 2022 thus enabling a comparison of the results.

Table 6.1: **Letting Agents - Target vs Achieved**

	Target 2020/2022[11] (N=150)	**Achieved 2020 (N=81)**	**Achieved 2022 (N=143)**
Region			
Dublin	39%	31%	31%
Leinster (excluding Dublin)	21%	32%	26%
Munster	25%	25%	29%
Connacht and Ulster	15%	12%	14%

Analysis

Before analysis and coding began, Amárach employed similar quality checks and data validations to those outlined above for other elements of the quantitative research programme.

A series of derived variables, similar to those in the 2020 survey, were produced and checked. These included the banding of raw variables such as number of residential lettings managed by branch and number of new tenancy agreements negotiated for property owners in 2021.

The online survey script had numerous quality checks in place, for example to restrict implausible value ranges or to prevent respondents selecting mutually exclusive answers. However, some additional data cleaning was required before the data analysis stage.

Data analyses included frequencies, cross tabulations, and other outputs (calculations such as mean and median) designed to examine and understand the data collected.

The number of responses achieved in 2020 (81) meant that it was only possible to report the findings for each question in their entirety. However, the greater number of responses achieved in 2022 (143) meant that where relevant, the results were reported for 2022 in total and by region (Dublin versus outside Dublin).

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11 Private tenancies registered with the RTB at the end of 2020 LA Level

6.2   Qualitative Research

The qualitative element of the letting agent research consisted of in-depth telephone interviews with letting agents. The same approach was adopted in 2020 and 2022.

As part of the online survey, respondents were asked whether they would be willing to engage in further research on the topic. Of those who expressed a willingness to engage in this qualitative research element, 13 were selected randomly to take part in a telephone interview lasting 45-60 minutes. The interviews for the first wave of qualitative research were completed in Q4 2020 and the interviews for the second wave were completed in Q4 2022.

Across both waves of qualitative research, an even spread of agents was achieved by region (Dublin, Rest of Leinster, Connaught, and Munster).

All of those interviewed were the key decision takers within their organisations. They all had at least 10 years' experience in the property rental management business.

The 2022 interviews were carried out in parallel to the quantitative research in Q4 2022. They were conducted by Michele Cluskey, Associate Director of Amárach Research.

The Discussion Guide used in 2022 was similar to that of 2020 to allow for comparison of results. Any changes that were made to the 2022 Discussion Guide were done in collaboration with the RTB Research Team.

Reporting the Results

7

Detailed findings from each element of the research programme are provided in the main survey reports.

Amárach worked closely with the RTB to agree the content of each report including a detailed analysis of the data emerging from the qualitative and quantitative phases.

The final reports included key findings and contained both textual and graphical analysis. All submitted reports were prepared on the basis that they would be published in that form and would be overseen by Gerard O'Neill (Project Director).

The final reports were in MS Word format and written to a publishable standard.

Data Protection and Security

8

All potential respondents were given the following reassurances regarding their participation in the research programme:

▶ All information provided will be treated confidentially and will never be linked to a respondent's name or address. Amárach Research is an independent market research agency that is governed by the Data Protection Acts 1998 and 2003 and fully compliant with GDPR regulations.

▶ A respondent may refuse to answer any individual questions or to stop the interview at any stage. He/she may withdraw consent to participate at any time, without obligation. If a respondent withdraws consent during the interview, no answers already provided will be stored.

▶ All data is stored on a secure server. With the exception of contact details all data will be anonymised and no survey responses will be identifiable to the respondent. The respondent's contact details will be retained for six months and then deleted after quality checking is completed.

Appendix I

Tenant Survey

Local Authority	Private Tenancies Count	%
Carlow County Council	3,200	1.07%
Cavan County Council	3,024	1.02%
Clare County Council	4,666	1.57%
Cork City Council	18,168	6.10%
Cork County Council	14,758	4.95%
Donegal County Council	6,022	2.02%
Dublin City Council	69,331	23.27%
Dun Laoghaire-Rathdown County Council	18,313	6.15%
Fingal County Council	18,965	6.37%
Galway City Council	10,587	3.55%
Galway County Council	6,599	2.22%
Kerry County Council	7,533	2.53%
Kildare County Council	11,252	3.78%
Kilkenny County Council	4,209	1.41%
Laois County Council	3,639	1.22%
Leitrim County Council	1,557	0.52%
Limerick City Council	11,710	3.93%
Longford County Council	2,401	0.81%
Louth County Council	6,647	2.23%
Mayo County Council	6,008	2.02%
Meath County Council	7,703	2.59%
Monaghan County Council	2,092	0.70%
Tipperary County Council	6,806	2.28%
Offaly County Council	3,165	1.06%
Roscommon County Council	2,876	0.97%
Sligo County Council	4,372	1.47%
South Dublin County Council	14,627	4.91%
Waterford City Council	7,924	2.66%
Westmeath County Council	5,808	1.95%
Wexford County Council	7,680	2.58%
Wicklow County Council	6,257	2.10%
	297,899	**100.00%**

Appendix II
Medium Landlord Survey Sampling

Below are the steps followed to provide the contact details for the medium landlord survey.
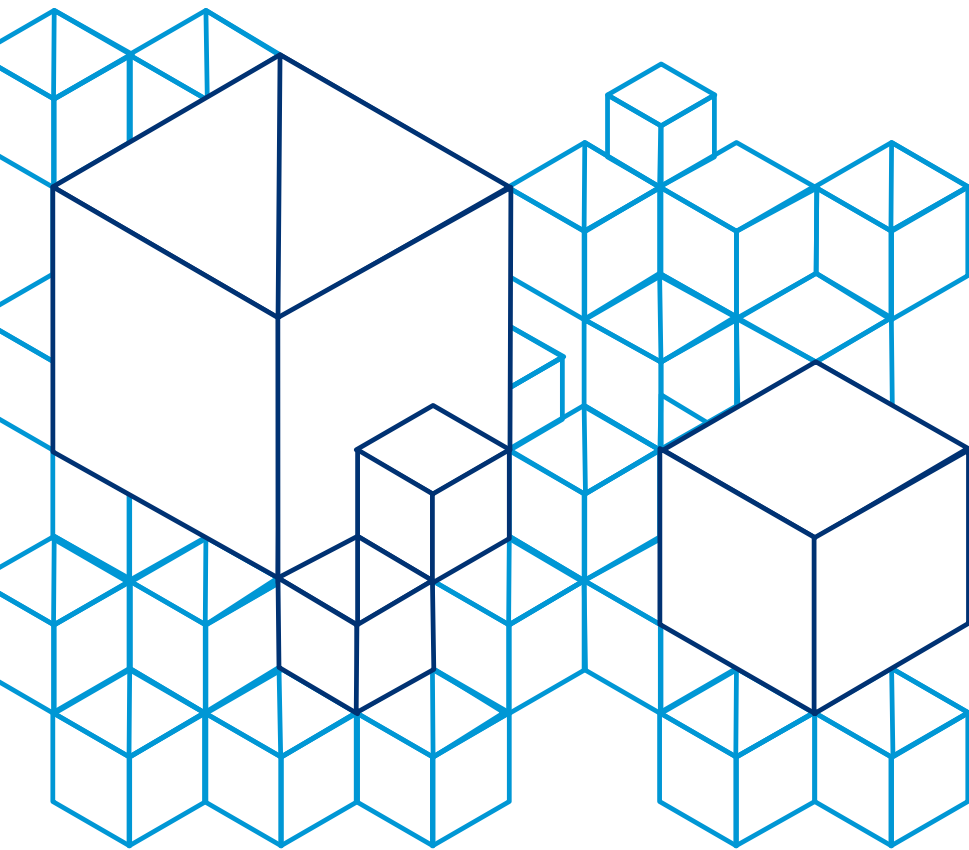
Procedure followed:

▶ Started with 13,126 rows of data.

▶ Eliminated rows where **marketing** was coded as **'No'** (n=9,773) leaving 3,353 rows.

▶ Removed rows where it was identified **valid contact details** (e.g. phone number /email address) were **missing** (n=42) leaving 3,311 rows. Some invalid numbers/emails could remain.

▶ Removed rows where a **name** was **missing** for the contact (n=3) leaving 3,308 rows.

▶ Removed rows where the contact was considered to have **99+ properties** (n=71) leaving 3,237 rows.

▶ A **first check** for **duplicates** was conducted which eliminated 392 rows and identified 10 **ineligible rows**, i.e. AHBs, leaving 2,835 rows of contacts.

  – It is possible some AHBs may not have been identified in the check and so remain.

    – **AHBs** are to **exit the interview**/be filtered out.

▶ A **second check** for **duplicates** identified 12 more rows and 4 rows of ineligible contacts leaving 2,819 rows.

  – Due to the nature of the data, there could remain some duplicates that were not detected, for example, different formatting of the data entered for names and numbers etc. (e.g. +353861234567/ 0861234567/861234567)

▶ To ensure a contact that had been reached as part of the small landlord survey was not called as part of the medium landlord survey the **contacts** that were sent to Amárach for the **small landlord survey** were then **cross-referenced** with the 2,819 rows of data. There were 20 rows identified for removal. Of which in 19 cases a name, email, and phone number matched and in one a name and phone number matched. This left 2,799 rows.

  – There remain 13 phone numbers in the medium landlord contacts that were also found to have been in the contacts send to Amárach. However, they were not removed as the contact (names/ email) associated with the numbers didn't appear to be a match.

  – It is possible that they could be letting agent numbers.

    – **Letting agents** are to **exit the interview**/be filtered out [see definition of letting agents for clarification].

▶ Within the final 2,799 rows there are instances where a phone number appears multiple times. However, like above the names and emails provided don't match therefore they were not removed.

  – It is also possible that they could be letting agent numbers. **Letting agents** are to **exit the interview**/be filtered out [see definition of letting agents for clarification].

Random Selection

▶ A column was entered alongside the 2,799 rows and the RAND function in Excel was used to create a random number associated with each row, the row was copied, and the value pasted to ensure the random numbers don't continue to generate.

▶ The random numbers were sorted in ascending order.

▶ Batches of 200 starting from the smallest random number to the largest were created and used in order from the first batch selected.

▶ Prior to sending a batch of contacts to Amárach the 200 contacts will be emailed, for any emails undelivered the matching contact will be removed, and any persons not consenting to contact or identified for other reasons not to contact will be removed. Then the list will be sent.

▶ Even after the batch has been sent to Amárach, the RTB will contact Amárach if additional non-responses or contacts not to be reached regarding the survey are identified.

Gauge on Number of Tenancies

▶ In the list of contacts, the RTB will send across there is a rough gauge on the number of tenancies a landlord may have.

  - This may be off from the actual figure due to accrual of properties or reduction in properties a landlord is related to since the cut was taken.

  - It also could be off as due to some anomalies in the landlord data cut and when duplicate contacts were removed the sum of tenancies were not altered, so if a landlord had in one row 3 properties and in another 4, the tenancies column wasn't updated to reflect the potential variance.

Notes