



PRIVATE RENTED SECTOR

in Northern Ireland

Stock Profile and Physical Condition Report

Report Two

Housing
Executive

The Regional Strategic Housing Authority for Northern Ireland



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1.0 INTRODUCTION

This report is the second of eight reports in a series which provides an analysis of different elements of the private rented sector in Northern Ireland.

The eight reports are:

- Report One: Introduction and Background to Research Series
- Report Two: Stock Profile and Physical Condition Report
- Report Three: Socio-economic Profile of Tenants in the Private Rented Sector
- Report Four: Living in the Private Rented Sector: The Experience of Tenants
- Report Five: Government Measures Report
- Report Six: Landlords Perspective Report
- Report Seven: Housing Benefit and the Private Rented Sector
- Report Eight: The Private Rented Sector North and South

An introduction paper outlined the background to the research and highlighted the key policy developments and trends which impact the private rented sector. This second report provides an analysis of the private rented sector in Northern Ireland, using data from the 2001 and 2006 House Condition Surveys. It examines stock in terms of the distribution, nature and condition of dwellings in the private rented sector in Northern Ireland.



2.0 METHODOLOGY

Information from the House Condition Survey was analysed to provide a comprehensive analysis of the characteristics and condition of the private rented stock. The House Condition Survey is the largest sample survey in Northern Ireland and provides the most in-depth insight into housing in Northern Ireland. The survey collects information on the physical attributes of dwellings and socio-economic data relating to the circumstances of households.

The House Condition Survey is traditionally carried out every five years, although in 2004 the first Interim House Condition Survey was carried out. This research report will in the main compare data from the 2001 and 2006 House Condition Survey, as the sample for the 2004 Interim House Condition Survey was both much smaller than, and drawn differently from, that of the main survey. This report therefore only includes figures from the 2004 Interim House Condition Survey at the Northern Ireland level.



3.0 THE GROWTH OF PRS

Following years of decline, the private rented sector (PRS) in Northern Ireland has been increasing rapidly in recent years (see Figure 1). The 2001 House Condition Survey estimated that there were 49,400 (7.6%) privately rented dwellings in Northern Ireland, by 2004 this figure had increased to 62,500

(9.2%) and the 2006 House Condition Survey showed a substantial increase in the sector to 80,900 dwellings (11.5% of the total stock).

Between 2001 and 2006 there has been an increase of 31,400 privately rented dwellings (64%), an average annual increase of 6,300

Figure 1: The growth of the private rented sector in Northern Ireland (number and as a percentage of the total housing stock)

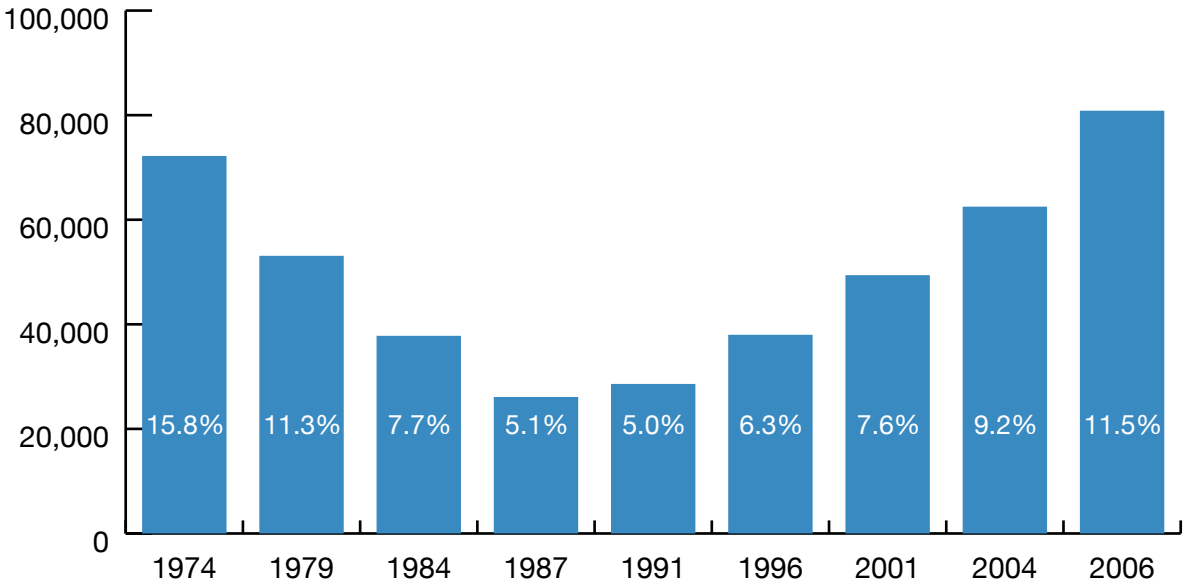


Table 1: Tenure by vacant homes, 2006

	No of vacants	Vacancy rate	% of all vacants	Total (no vacants)	Total (no vacants) (%)	Total with vacants	Total with vacants (%)
Owner Occupied	21,600	4.4	53.6	468,800	66.5	490,400	69.6
Private Rented	13,800	14.6	34.2	80,900	11.5	94,700	13.4
Housing Executive	3,500	3.6	8.4	93,400	13.3	96,900	13.7
Housing Association	1,500	6.5	3.7	21,500	3.1	23,000	3.3
Total	40,400	5.7	100	664,600	100	705,000	100

dwelling. However, further analysis shows that there has been an accelerated rate of growth between these years: between 2001 and 2004 there was an increase of 13,100 dwellings (almost 4,400 per annum) and between 2004 and 2006 the sector increased by 18,400 dwellings (almost 9,200 per annum).

This sharp increase reflects the growing interest in the buy-to-let sector at a time of rapidly increasing house prices.

3.1 Vacant privately rented dwellings

The House Condition Survey also classifies vacant dwellings by the tenure of dwellings when they were last occupied. The 2006 House Condition Survey showed that of the total stock of 705,000 approximately 40,300 (5.7%) were vacant. Of these vacant properties, 21,600 were owner occupied, 13,800 were privately rented, 3,500 were Housing Executive dwellings and 1,500 were housing association dwellings when last occupied (Table 1). Therefore, with the inclusion of vacant properties which were privately rented when last occupied, the overall figure rises to 94,700 privately rented dwellings (13%).

Vacant properties which were privately rented when last occupied represented a

disproportionately high component of vacant properties (one third: 34%) of all vacant properties in Northern Ireland in 2006.

In addition, the rate of vacancy is significantly higher in the private rented sector than for the stock as a whole and for each of the other three tenures. According to the 2006 House Condition Survey the vacancy rate for the private rented sector was 15 per cent compared to 5.7 per cent in the stock as a whole, 6.5 per cent in housing association dwellings, 4.4 per cent in the owner occupied sector and 3.6 per cent in the Housing Executive dwellings.

The number of vacant dwellings which were privately rented when last occupied increased significantly from 8,200 in 2001 to 13,800 in 2006, an increase of 68 per cent or 5,600 dwellings. However, the vacancy rate in the private rented sector in 2006 remained similar to the 2001 level of 14 per cent (Table 2).

Location of vacant private rented dwellings (Appendix Table A2)

In 2006 nearly three-quarters (73%: 10,000 dwellings) of vacant private rented properties were located in urban areas, an increase since 2001 when less than two-thirds (62%) of vacant private rented properties were located in urban

Table 2: Dwellings which were privately rented when last occupied-Vacancy Rate

	No of vacants which were PRS	Vacancy rate	Total No PRS with vacants	% of total stock PRS including vacants
2001	8,200	14.2	57,600	8.9
2006	13,800	14.6	94,700	13.4

areas. In particular, Belfast Metropolitan Area (BMA) contained high levels of vacant private rented properties: 45 per cent of all vacant private rented dwellings were located in the BMA, whereas only 36 per cent of all vacant properties were located in the BMA.

Age of vacant private rented dwellings (Appendix Table A4)

In 2006 the majority of vacant private rented dwellings were older properties; more than half (52%: 7,200) were constructed before 1919 and a further 15 per cent (2,100 dwellings) were constructed between 1919 and 1944. This is similar to the pattern found in 2001; for example, in 2001 54 per cent of vacant private rented dwellings were constructed before 1919. Indeed, in 2006 vacant dwellings in the private rented sector built before 1944 represented two-fifths (42%) of all vacant dwellings built before 1944.

Dwelling type of vacant private rented dwellings (Appendix Table A7)

The most common vacant privately rented dwelling types in 2006 were terraced houses (29%: 4,000) and flats/apartments (28%: 3,800). The proportion of vacant privately rented terraced houses has decreased from 36 per cent in 2001, whilst the proportion of vacant privately rented flats/apartments has increased from 22 per cent in 2001. Of particular significance is the vacancy in flats/apartments, vacant privately rented flats/apartments account for half (50 per cent) of all vacant flats/apartments.

For the purposes of this report, vacant dwellings will be excluded from the remainder of the analysis, both for consistency with the published 2001 and 2006 figures and because vacant properties are strictly no longer in the private rented sector.

3.2 Distribution of the private rented sector (Appendix Table A2)

This section examines the distribution of the private rented sector, first in terms of what proportion of the stock in urban and rural areas is privately rented and secondly, how the private rented stock as a whole is distributed across urban and rural areas.

Proportion of private rented sector in urban- rural locations

Table 3 shows the proportion of stock in urban and rural areas that is privately rented. The private rented sector continues to be over-represented in urban areas and under-represented in rural areas. In 2001 the overall proportion of private rented properties was 7.6 per cent. In urban areas 8.1 per cent of properties were privately rented, whereas the comparable proportion for rural areas was 6.6 per cent.

In 2006 a similar pattern emerged – the overall proportion of private rented properties was 11.5 per cent, and 12.5 per cent of urban properties were privately rented and only 9.0 per cent of rural dwellings were privately rented. However, this trend has reversed in the Belfast Metropolitan Area (BMA): in 2001 there was an above average proportion of privately rented dwellings in the BMA (8.2% compared to 7.6%), and by 2006 there was a below average proportion of private rented dwellings in the BMA (10.8% compared to 11.5%).

Table 3: Proportion of private rented stock in urban-rural locations

	2001		2006	
	No	%	No	%
BMA	21,550	8.2	29,620	10.8
District & other towns	15,240	7.9	32,220	14.8
Total Urban	36,790	8.1	61,840	12.5
Small Settlement	4,830	6.3	11,860	11.1
Isolated Rural	7,790	6.8	7,140	6.8
Total Rural	12,620	6.6	19,000	9.0
Total	49,410	7.6	80,870	11.5

Distribution of private rented sector across urban-rural areas

Table 4 shows how the private rented sector is distributed across urban and rural areas. It shows that the proportion of private rented stock located in urban areas has increased from 74 per cent in 2001 to 77 per cent in 2006, and conversely that the proportion of

Table 4: Distribution of private rented sector across urban-rural areas

	2001		2006	
	Distribution of PRS %	Distribution of total stock %	Distribution of PRS %	Distribution of total stock %
BMA	43.6	40.8	36.6	39.1
District & other towns	30.8	29.8	39.9	31.0
Total Urban	74.4	70.6	76.5	70.0
Small Settlement	9.8	11.8	14.7	15.2
Isolated Rural	15.8	17.7	8.8	14.8
Total Rural	25.6	29.5	23.5	30.0

private rented stock located in rural areas has declined from 26 per cent in 2001 to 24 per cent in 2006.

However, this masks important variations within the urban-rural distribution of the private rented stock. Whilst overall the proportion of the private rented stock located in urban areas has increased, the proportion of the private rented stock located in the BMA decreased from 44 per cent in 2001 to 37 per cent in 2006. Similarly, whilst the overall proportion of private rented stock located in rural areas decreased, the proportion of privately rented dwellings located in small settlements increased from 10 per cent in 2001 to 15 per cent in 2006.

When compared to the distribution of the stock as a whole, the private rented sector in 2006 was over-represented in urban areas (77%) compared to the stock as a whole (70%) and under-represented in rural areas (24%) compared to the stock as a whole (30%).

3.3 Location of the private rented sector by District Council Area

Table 5 shows the distribution of the private rented sector across all 26 district council areas in Northern Ireland² and reveals significant differences in concentrations of privately rented dwellings across the district council areas.

Almost half (44%: 35,600 dwellings) of all private rented dwellings are located in five district council areas, each containing at least 4,000 privately rented dwellings (Belfast, Coleraine, Craigavon, Derry and Lisburn).

Three of these district council areas (Belfast, Coleraine and Derry) contain universities and consequently have a large student population, whilst Lisburn is within easy commuting distance of Belfast. Local information confirms that the relatively high number of privately rented dwellings in Craigavon District Council is linked to concentrations of migrant workers in this area.

According to the 2006 House Condition Survey, the private rented sector accounted for 11.5 per cent of the total housing stock in Northern Ireland. However, there were considerable differences across district councils in the proportion of dwellings which were privately rented. Coleraine, Dungannon, Fermanagh, Limavady, Moyle and Omagh all had more than 15 per cent of their total housing stock located in the private rented sector.

These district council areas are predominantly remote and rural, and most are associated with concentrations of migrant workers. Several district council areas contained substantially lower proportions of private rented dwellings than the overall average of 11.5 per cent: Carrickfergus, Castlereagh, Newry and Mourne and Strabane district council areas had less

2. Some caution must be exercised in interpreting these results as sample error could explain at least part of the differences.

than 8 per cent of their total housing stock in the private rented sector.

Overall, the private rented sector has increased by 64 per cent between 2001 and 2006. However, several district council areas

saw the size of the private rented sector more than double over this time: Armagh, Ballymoney, Banbridge, Coleraine, Craigavon, Fermanagh, Limavady, Magherafelt, Moyle, Newtownabbey and Omagh.

Table 5: Private rented sector by District Council Area

	2001				2006				% inc betw 01-06
	No of PRS	% of total PRS stock	% of stock within district	Total Stock within district	No of PRS	% of total PRS stock	Total Stock within district	% of stock within district	
Antrim	1,400	2.8	8.3	16,940	1,780	2.2	18,570	9.6	27.1
Ards	2,780	5.6	9.4	29,550	2,570	3.2	30,880	8.3	-7.6
Armagh	900	1.8	4.6	19,390	2,350	2.9	20,820	11.3	161.1
Ballymena	1,650	3.3	7.3	22,770	2,010	2.5	22,970	8.8	21.8
Ballymoney	500	1.0	5.2	9,570	1,170	1.4	12,130	9.6	134.0
Banbridge	610	1.2	3.9	15,700	1,760	2.2	18,140	9.7	188.5
Belfast	12,970	26.3	10.9	119,170	16,620	20.6	124,600	13.3	28.1
Carrickfergus	680	1.4	4.5	15,040	1,280	1.6	16,620	7.7	88.2
Castlereagh	1,130	2.3	4.2	27,310	1,550	1.9	28,550	5.4	37.2
Coleraine	2,320	4.7	9.6	24,060	4,660	5.8	26,230	17.8	100.9
Cookstown	840	1.7	7.3	11,480	1,040	1.3	12,440	8.4	23.8
Craigavon	1,850	3.7	6.0	30,660	5,050	6.2	34,160	14.8	173.0
Derry	2,690	5.4	7.3	36,920	5,120	6.3	41,330	12.4	90.3
Down	1,600	3.2	6.9	23,250	2,480	3.1	28,290	8.8	55.0
Dungannon	1,780	3.6	10.1	17,650	3,290	4.1	20,790	15.8	84.8
Fermanagh	1,520	3.1	6.9	22,120	3,490	4.3	22,900	15.2	129.6
Larne	850	1.7	6.6	12,850	1,420	1.8	13,140	10.8	67.1
Limavady	1,110	2.3	10.7	10,400	2,650	3.3	12,160	21.8	138.7
Lisburn	3,010	6.1	7.5	40,060	4,180	5.2	42,650	9.8	38.9
Magherafelt	720	1.5	5.5	13,150	1,610	2.0	14,270	11.3	123.6
Moyle	630	1.3	9.5	6,680	1,350	1.7	7,880	17.2	114.3
Newry & Mourne	2,080	4.2	6.8	30,640	2,400	3.0	34,360	7.0	15.4
Newtownabbey	1,330	2.7	4.3	31,040	3,070	3.8	34,510	8.9	130.8
North Down	2,420	4.9	7.7	31,270	3,640	4.5	32,440	11.2	50.4
Omagh	1,220	2.5	7.4	16,600	3,270	4.0	19,150	17.1	168.0
Strabane	810	1.6	6.1	13,260	1,060	1.3	15,020	7.1	30.9
Total	49,410	100.0	7.6	647,560	80,870	100.0	705,000	11.5	63.7

3.4 Dwelling Age (Appendix Tables A4-A6)

Traditionally the private rented sector has been associated with older dwellings. The 2006 House Condition Survey confirmed that stock within the private rented sector generally remains older than the other tenures, although it also showed that considerable numbers of newer dwellings are entering the sector, resulting in a gradually more modern age profile.

Figure 2 shows that in 2006 the private rented sector had a higher proportion of older stock

than any other occupied tenure: 28 per cent of privately rented dwellings were built before 1919, compared to 15 per cent in the owner occupied sector, 9 per cent of housing association dwellings, and 3 per cent of Housing Executive dwellings. Similarly, private rented dwellings built between 1919 and 1944 accounted for 16 per cent of the private rented sector compared with 10 per cent of the total housing stock.

In the private rented sector 25 per cent of dwellings were built after 1980, lower than the proportion found in the owner occupied

Figure 2: Dwelling age - all tenures 2006

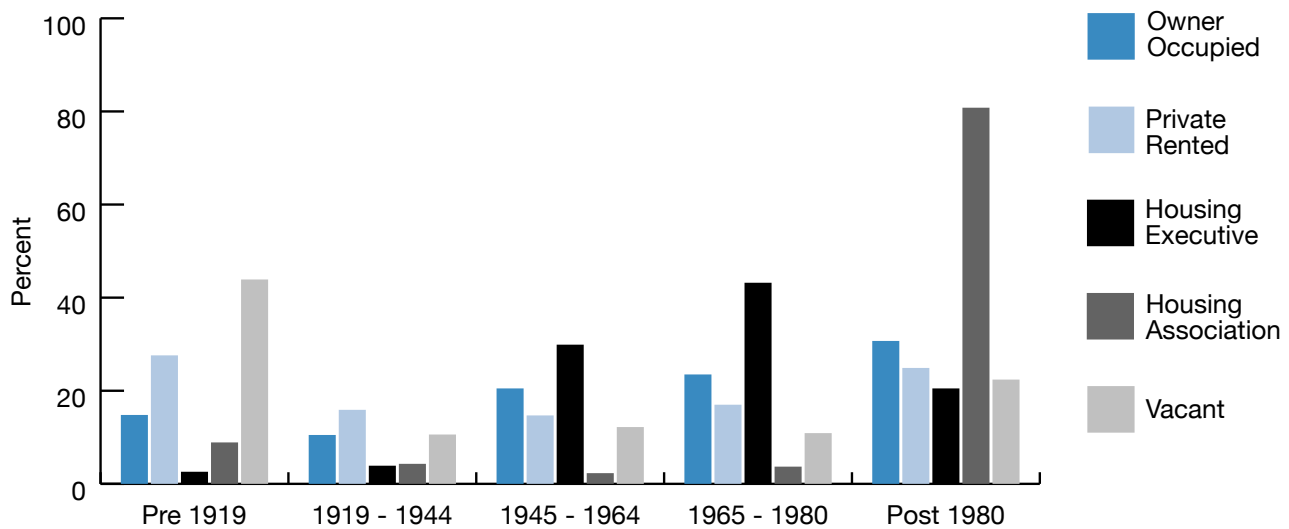
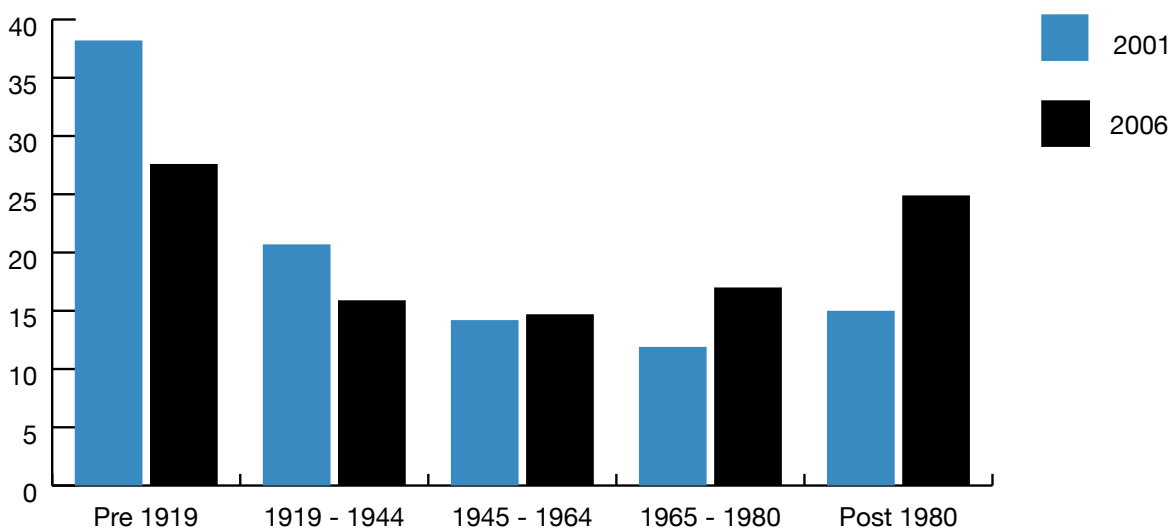


Figure 3: Dwelling age - private rented sector 2001 and 2006



sector (31%) and in the housing association sector (81%), although the private rented sector contained a higher proportion of after 1980 dwellings than that found in Housing Executive properties.

Although the private rented sector contains a relatively high proportion of older stock in comparison to other tenures, Figure 3 shows that the proportion of older stock in the private rented sector is decreasing and the proportion of properties built after 1980 is increasing, reflecting heavy investment to new build dwellings by buy-to-let investors (see Appendix Table A7).

In 2001 38 per cent of privately rented dwellings were built before 1919, and by 2006 this had decreased to 28 per cent. Similarly, the proportion of dwellings built between 1919 and 1944 decreased from 21 per cent in 2001 to 16 per cent in 2006 (although numerically the number has increased slightly). The proportion of properties in the private rented sector which were built after 1980 has jumped from 15 per cent in 2001 to 25 per cent in 2006, representing an increase of 12,700 dwellings.

Further analysis of privately rented dwellings constructed since 1980 found that the vast majority were constructed after 1990 (15,000 dwellings compared to 5,100 dwellings constructed between 1981 and 1990), confirming the investment in new build properties by buy-to-let investors.

3.5 Dwelling type (Appendix Tables A6-A7)

The 2006 House Condition Survey showed that the profile of the private rented sector differs in terms of dwelling type from that found in the other tenures. Compared to the owner occupied sector, it has much lower proportions of bungalows and detached houses and significantly higher proportions of terraced houses and flats/apartments.

Compared to the social sector, it has lower proportions of detached houses and flats/apartments. When compared with the stock as a whole in Northern Ireland in 2006, the private rented sector had significantly lower proportions of bungalows and detached houses and significantly higher levels of terraced houses.

Comparison with the private rented stock in 2001 reveals that terraced houses not only remain the most common dwelling type (40% in 2001 and 46% in 2006), but that this dwelling type has substantially increased numerically, from less than 20,000 terraced houses in 2001 to 37,000 in 2006, reflecting the popularity of this dwelling type as a buy-to-let investment.

Semi-detached houses also became more prevalent in the private rented sector in 2006, increasing by four percentage points to 20 per cent in 2006, but perhaps more importantly,

Figure 4: Dwelling type - all tenures 2006

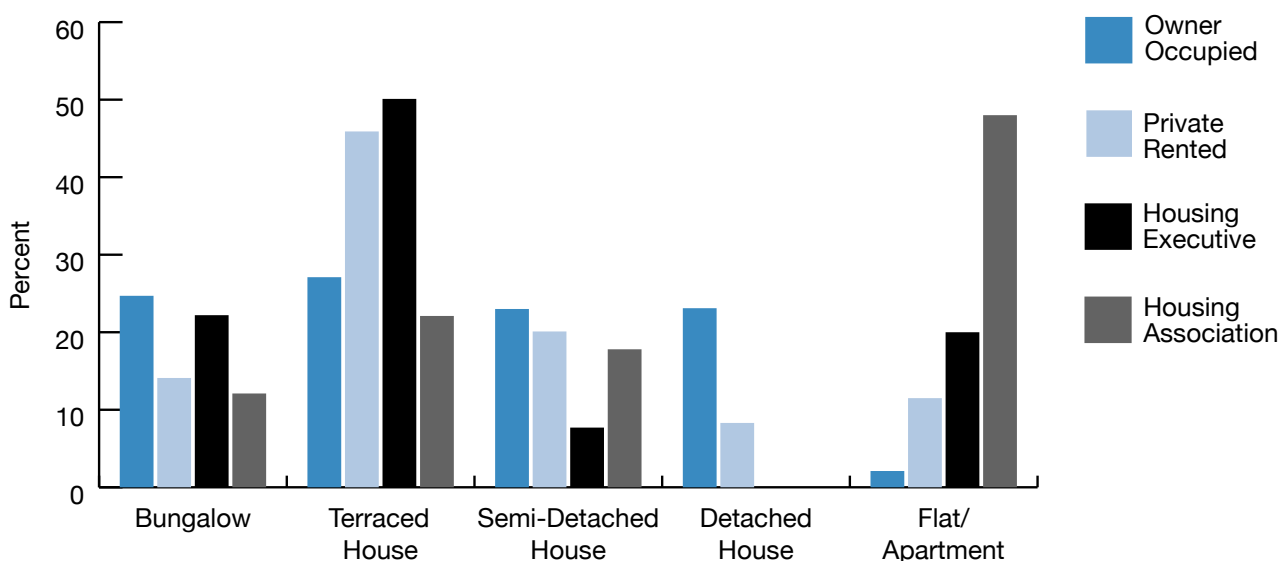
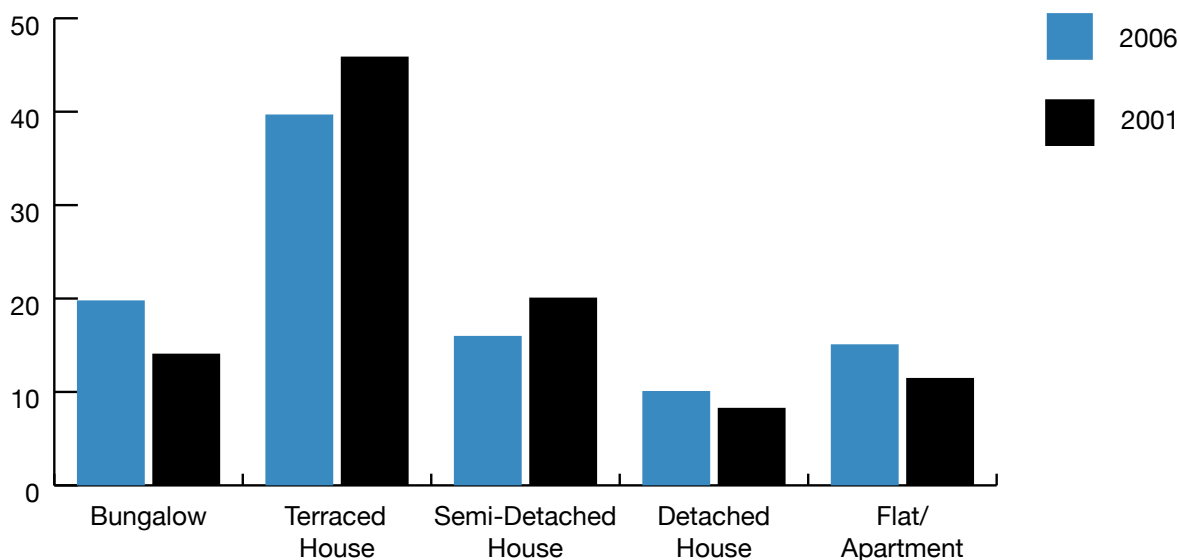


Figure 5: Dwelling type - private rented sector 2001 and 2006



doubling in size from less than 8,000 semi-detached houses in 2001 to more than 16,000 in the sector in 2006. Furthermore, whilst the proportions of bungalows, detached houses and flats/apartments have decreased from 2001 to 2006, numerically they have all increased in size since 2001.

3.6 Conditions in the Private Rented Sector

The 2006 House Condition Survey indicated that in terms of unfitness, conditions in the private rented sector such as the provision of full central heating and the incidence of full double glazing are improving, although in some cases the private rented sector is still behind the other main tenures in terms of these criteria.

Unfitness (Appendix Tables A8-A15)

In 2006 the House Condition Survey estimated that there were approximately 24,200 unfit dwellings in Northern Ireland, representing an unfitness rate of 3.4 per cent. This represents a decrease from 2001, when the House Condition Survey found that there were 31,600 unfit dwellings in Northern Ireland, an unfitness rate of 4.9 per cent. Unfitness has also decreased in the private rented sector although it still has the highest rate of unfitness compared with the other tenures.

Analysis of all unfit dwellings in 2006 (see Table 6) showed that over half were vacant (58%), approximately 31 per cent were owner occupied, 9 per cent were private rented, 2 per cent were Housing Executive and less than one per cent were housing association dwellings.

Table 6 confirms that the proportion of unfit properties located in the occupied dwelling stock had decreased: in 2001 over half (56%) of unfit dwellings were located in the occupied stock, but by 2006 less than half of all unfit dwellings were located in the occupied stock (42%).

Table 6: Unfitness (all tenures) 2001 and 2006

	2001		2006	
	No	%	No	%
Owner occupied	11,900	38.0	7,500	31.0
Private Rented	4,290	13.6	2,160	8.8
Housing Executive	900	2.9	500	2.1
Housing Association	370	1.2	90	0.4
Vacant	14,020	44.4	13,910	57.7
Total	31,570	100	24,160	100

The unfitness rate in the occupied private rented sector decreased substantially from 8.7 per cent (4,300 dwellings) in 2001 to 2.7 per cent (2,200 dwellings) in 2006. This reflects not only the expansion of buy-to-let into modern properties, but also the level of (often grant aided) investment by private landlords. Indeed, the private rented sector witnessed the greatest proportional decrease in the rate of unfitness in occupied stock compared to other tenures, reflected in a decrease of 6 percentage points, compared to 1.2 percentage points in the owner occupied sector, 0.3 percentage points in Housing Executive dwellings and 1.7 percentage points in housing association dwellings.

However, whilst this decrease in unfitness in the private rented sector has been substantial, this sector still had a higher rate of unfitness than the other occupied tenures in 2006 (2.7% unfitness rate in the private rented sector, compared to 1.6 per cent in the owner occupied sector, 0.5% in Housing Executive dwellings and 0.4% in housing association dwellings).

Unfitness - dwelling age (Appendix Table A12)
Unfitness is clearly related to dwelling age - the older the property the more likely it is to be unfit. The 2006 House Condition Survey found that in the total housing stock, of all unfit properties 62% were built before 1919. Similarly, in the private rented sector in 2006,

over half (54%) of unfit dwellings were built before 1919.

Unfitness - dwelling type (Appendix Table A13)
Within the stock as a whole in 2006 unfit properties were most likely to be bungalows (26%), detached houses (25%) or terraced houses (22%). In the private rented sector in 2006 terraced houses (47%) were the most common dwelling type among all unfit properties, followed by bungalows (28%).

Unfitness - age of household reference person (HRP) (Appendix Table A14)
In the stock as a whole, more than two-thirds (68%) of all unfit dwellings were occupied by HRPs aged 60 or older. Similarly, nearly two-thirds (60%) of unfit dwellings in the private rented sector were occupied by HRPs aged 60 or older. Indeed, the rate of unfitness for this group was 7.8 per cent, substantially higher than the 2.7 per cent found in the stock as a whole.

Unfitness - income (Appendix Table A15)
Households living in unfit private rented stock were concentrated in the lower income brackets. In 2006 three-quarters (76%) of households living in unfit private rented stock had incomes of less than £10,000 per annum.

State of repair
In 2006 within the occupied stock, the private rented sector had a higher proportion of

Figure 6: Unfitness rates, all tenures 2001 and 2006

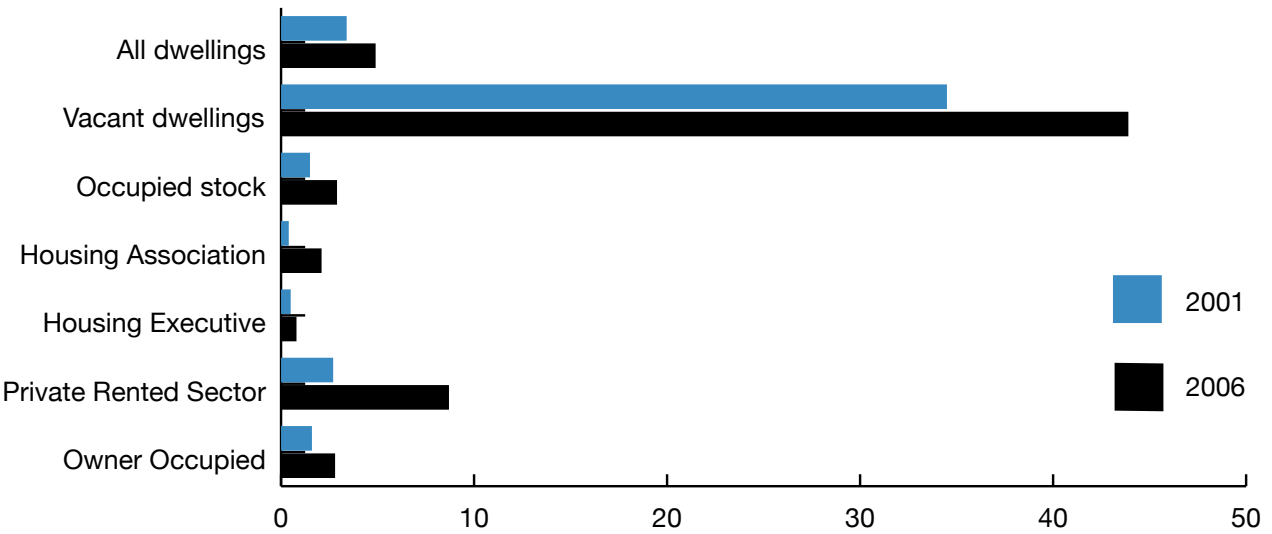


Table 7: Fabric Disrepair in the PRS 2001 and 2006

	2001				2006			
	None		Any fabric disrepair		None		Any fabric disrepair	
	No	%	No	%	No	%	No	%
Owner occupied	188,810	43.7	243,460	56.3	245,520	52.4	223,340	47.6
Private Rented	14,410	29.2	35,000	70.8	29,280	36.2	51,600	63.8
Housing Executive	47,160	40.7	68,820	59.3	37050	39.7	56,390	60.3
Private Rented	12,740	71.0	5,190	29.0	15850	73.6	5,680	26.4
Vacant	5,510	17.3	26,430	82.7	11450	73.6	28,850	71.6
Total	268,630	41.5	378,900	58.5	339150	48.1	365,860	51.9

dwelling with any fabric disrepair than the other occupied tenures (in the private rented sector 64% of dwellings had fabric disrepair, compared to 48% in the owner occupied sector, 60% in Housing Executive dwellings and 26% in Housing Association dwellings).

The proportion of privately rented dwellings with any fabric disrepair has decreased from 2001, when 71 per cent of dwellings in this sector had any fabric disrepair, although numerically this has increased (in 2001 35,000 privately rented dwellings had fabric disrepair and by 2006 this had increased to 51,600 dwellings).

3.8 Repair costs (Appendix Table A16)

The 2006 House Condition Survey revealed that repair costs in the private rented sector were substantially higher, for both urgent and basic repairs, than for any of the other occupied tenures. However, comparison with the 2001 House Condition Survey shows that average repair costs for privately rented dwellings are decreasing

In 2006 the average urgent repair cost in the private rented sector was £1,017, compared to £677 in the owner occupied sector, £243 in Housing Executive dwellings and £88 in

Figure 7: Repair costs for occupied tenures

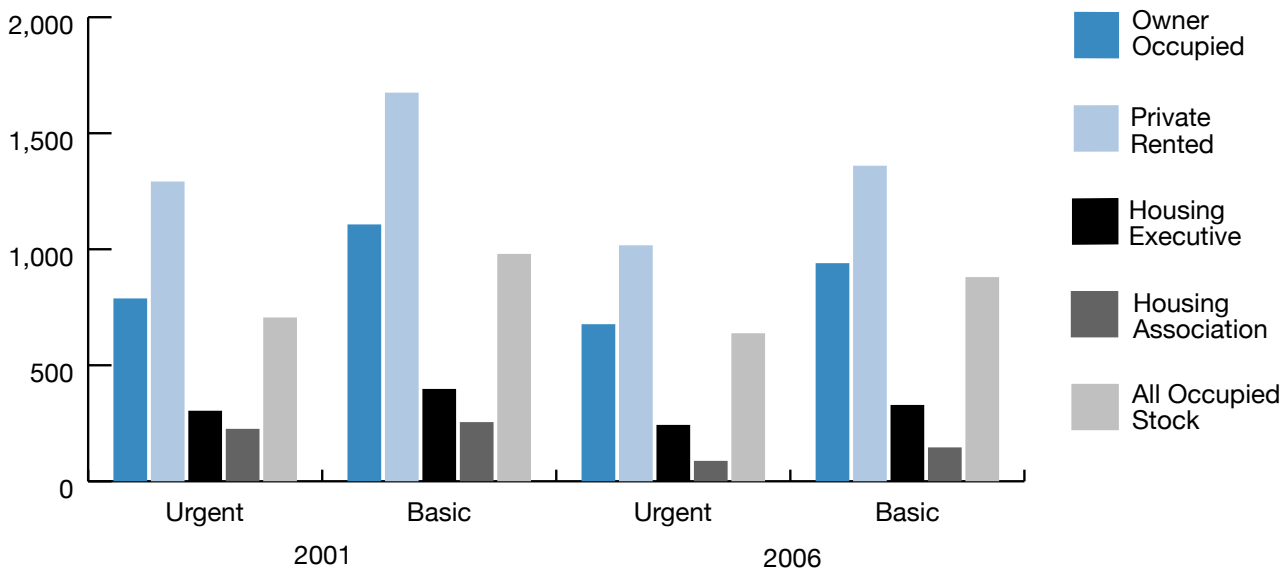
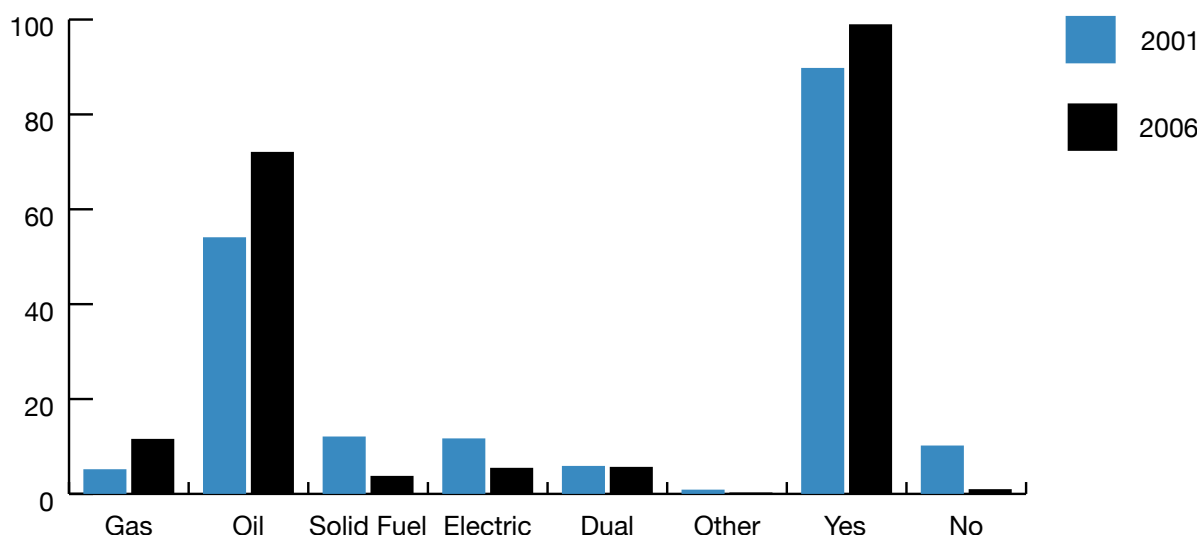


Figure 8: Central Heating in the Private Rented Sector 2001 and 2006



housing association dwellings, with an overall average for the total occupied housing stock of £638.

A similar pattern emerged for average basic repair costs. The average basic repair cost for private rented dwellings was £1,360 in 2006, compared to £940 in the owner occupied sector, £329 in Housing Executive dwellings and £146 in housing association dwellings, with an overall average basic repair cost for the occupied stock of £880.

Repair costs in the private rented sector are reducing: in 2001 the average urgent repair cost in the private rented sector was £1,292, but by 2006 had decreased to £1,017. Similarly, in 2001 the average basic repair cost for the private rented sector was £1,675, but by 2006 had decreased to £1,360.

3.9 Central Heating (Appendix Table A17)

The 2006 House Condition Survey showed that almost all (99%) privately rented dwellings had central heating (an increase from 90% in 2001). The House Condition Survey also showed considerable changes in the fuel source for heating in the private rented sector. The main change in fuel use in central heating systems in the private rented sector from 2001 to 2006

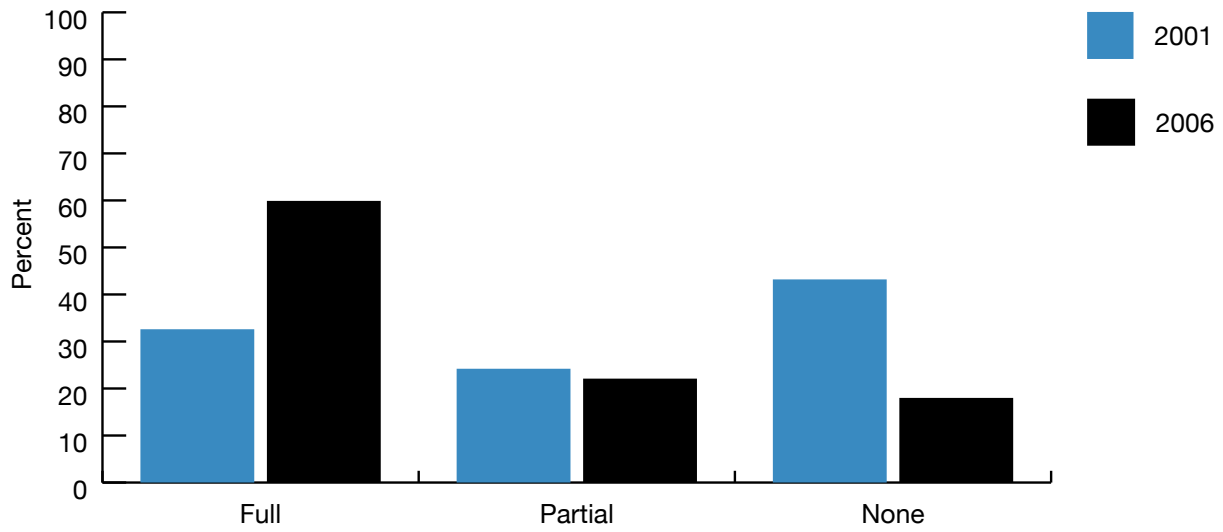
has been the increasing use of oil central heating (from 54% to 72%), with gas central heating also increasing, from 5 per cent to 12 per cent. The main central heating fuels which have decreased in usage in the private rented sector since 2001 are solid fuel (from 12% to 4% in 2006), and electricity, (from 12% to 6% in 2006), whilst dual fuel heating system usage has remained the same (6%).

3.10 Double glazing (Appendix Table 18)

The 2006 House Condition Survey demonstrated the substantial increase in double glazing in the private rented sector. In 2001 one-third of privately rented dwellings had full double glazing, which by 2006 had increased to 60 per cent, a little less than the proportion of all dwellings in Northern Ireland that had full double glazing in 2006 (68%).

Conversely, in 2001 43 per cent of privately rented dwellings did not have any double glazing, compared to the overall proportion of 32 per cent. By 2006 the proportion of privately rented properties without double glazing decreased significantly to 18 per cent, which was still slightly higher than the overall proportion of 14 per cent of all dwellings without double glazing in 2006.

Figure 9: Double Glazing - private rented sector, 2001 and 2006





4.0 SUMMARY

The private rented sector is playing an increasingly important role within the housing market in Northern Ireland.

- In 2006 approximately three-quarters (77%) of the private rented stock in Northern Ireland was located in urban areas, higher than the proportion of the total stock which was located in urban areas in 2006 (70%).
- Analysis by district council areas revealed that almost half (44%) of all private rented dwellings were located in five District Council Areas, generally relating to high student/migrant worker populations or within commuting distance to Belfast.
- Although dwellings in the private rented sector had an older age profile than the other tenures (in 2006 28% of dwellings in the private rented sector were built before 1919 compared to 16% in the total stock) more new dwellings are entering the sector - the proportion of private rented dwellings built after 1980 increased from 15 per cent in 2001 to 25 per cent in 2006.
- Terraced housing continues to be the most common dwelling type in the private rented sector, representing 46 per cent of private rented dwellings in 2006. Semi-detached dwellings are also becoming increasingly popular, almost doubling numerically from less than 8,000 in 2001 to over 16,000 in 2006. The proportion of apartments in the private rented sector decreased slightly from 15 per cent in 2001 to 12 per cent in 2006, although numerically the number of apartments in the sector actually increased over this period.
- The rate of unfitness has decreased substantially in the private rented sector (from 8.7 per cent in 2001 to 2.7 per cent in 2006), reflecting not only the increase in newer properties but also the level of (often grant aided) investment by private landlords. However, the unfitness rate in the private rented sector continues to be higher than the other occupied tenures (1.6% in the owner occupied sector and less than one per cent in the social sector). Unfit dwellings tend to be older properties, and occupied by older HRPs and low income households.

- The private rented sector has a higher proportion of dwellings with fabric disrepair than any other tenure (64% in the private rented sector compared to 60% in Housing Executive dwellings, 48% in the owner occupied sector and 26% in housing association dwellings), although it has decreased since 2001 (71%). In addition, repair costs in the private rented sector were substantially higher than the other tenures (in 2006 the average urgent repair cost in the private rented sector was £1,017 compared to £677 for owner occupied dwellings, £243 for Housing Executive dwellings and £88 for housing association dwellings), although the average repair costs in the private rented sector are reducing (in 2001 the average urgent repair cost in the private rented sector was £1,292, but by 2006 had decreased to £1,017).
- Almost all privately rented dwellings had some form of central heating in 2006 (99%), although there have been significant changes in the source of heating, with increases in the use of oil and gas central heating.
- There has been a substantial increase in the proportion of private rented properties with double glazing in the private rented sector (in 2001 57% had full or partial double glazing increasing to 82% in 2006), although the proportion without double glazing is still slightly higher than that found in the stock as a whole.



APPENDIX TABLES

Table A1: Occupied dwellings in the private rented sector (1974-2006)

Year	No	%
1974	72,200	15.8
1979	53,100	11.3
1984	37,800	7.7
1987	26,100	5.1
1991	28,600	5.0
1996	38,000	6.3
2001	49,400	7.6
2004	62,500	9.2
2006	80,870	11.5

Table A2: Urban/Rural Location (2006)

	PRS Occupied		PRS Vacant		Total PRS stock (incl vacants)	Total Vacant Stock	Total Stock
	No	%	No	%	No	No	No
BMA	29,620	10.8	6,320	43.9	35,940	14,390	275,400
	36.6		45.9		38.0	35.7	39.1
District & other towns	32,220	14.8	3,700	35.0	35,920	10,570	218,410
	39.8		26.9		38.0	26.2	31.0
Total Urban	61,840	12.5	10,020	40.1	71,860	24,960	493,810
	76.5		72.9		76.0	61.9	70.0
Small Settlement	11,860	11.1	2,150	39.6	14,040	5,420	103,890
	14.7		15.6		14.8	13.5	15.2
Isolated Rural	7,140	6.8	1,580	15.9	8,720	9,920	104,300
	8.8		11.5		9.2	24.6	14.8
Total Rural	19,000	9.0	3,730	24.3	22,760	15,360	211,190
	23.5		27.1		24.0	38.1	30.0
Total	80,870	11.5	13,750	34.1	94,620	40,300	705,000
	100.0		100.0		100.0	100.0	100.0

Table A3: Private Rented Sector – District Council Location (2001 and 2006)

	2001				2006			
	No. of PRS	% of total PRS stock	% of stock within district	Total Stock within district	No. of PRS	% of total PRS stock	Total Stock within district	% of stock within district
Antrim	1,400	2.8	8.3	16,940	1,780	2.2	18,570	9.6
Ards	2,780	5.6	9.4	29,550	2,570	3.2	30,880	8.3
Armagh	900	1.8	4.6	19,390	2,350	2.9	20,820	11.3
Ballymena	1,650	3.3	7.3	22,770	2,010	2.5	22,970	8.8
Ballymoney	500	1.0	5.2	9,570	1,170	1.4	12,130	9.6
Banbridge	610	1.2	3.9	15,700	1,760	2.2	18,140	9.7
Belfast	12,970	26.3	10.9	119,170	16,620	20.6	124,600	13.3
Carrickfergus	680	1.4	4.5	15,040	1,280	1.6	16,620	7.7
Castlereagh	1,130	2.3	4.2	27,310	1,550	1.9	28,550	5.4
Coleraine	2,320	4.7	9.6	24,060	4,660	5.8	26,230	17.8
Cookstown	840	1.7	7.3	11,480	1,040	1.3	12,440	8.4
Craigavon	1,850	3.7	6.0	30,660	5,050	6.2	34,160	14.8
Derry	2,690	5.4	7.3	36,920	5,120	6.3	41,330	12.4
Down	1,600	3.2	6.9	23,250	2,480	3.1	28,290	8.8
Dungannon	1,780	3.6	10.1	17,650	3,290	4.1	20,790	15.8
Fermanagh	1,520	3.1	6.9	22,120	3,490	4.3	22,900	15.2
Larne	850	1.7	6.6	12,850	1,420	1.8	13,140	10.8
Limavady	1,110	2.3	10.7	10,400	2,650	3.3	12,160	21.8
Lisburn	3,010	6.1	7.5	40,060	4,180	5.2	42,650	9.8
Magherafelt	720	1.5	5.5	13,150	1,610	2.0	14,270	11.3
Moyle	630	1.3	9.5	6,680	1,350	1.7	7,880	17.2
Newry & Mourne	2,080	4.2	6.8	30,640	2,400	3.0	34,360	7.0
Newtownabbey	1,330	2.7	4.3	31,040	3,070	3.8	34,510	8.9
North Down	2,420	4.9	7.7	31,270	3,640	4.5	32,440	11.2
Omagh	1,220	2.5	7.4	16,600	3,270	4.0	19,150	17.1
Strabane	810	1.6	6.1	13,260	1,060	1.3	15,020	7.1
Total	49,410	100.0	7.6	647,560	80,870	100.0	705,000	11.5

Table A4: Dwelling Age PRS (2006)

	Occupied PRS		Vacant PRS		Total PRS stock (incl vacants)	Total Vacant Stock	Total Stock
	No	%	No	%	No	No	No
Pre 1919	22,290	19.6	7,190	40.6	29,480	17,690	113,810
		27.6		52.3		31.2	43.9
1919-1944	12,880	18.1	2,060	48.1	14,950	4,280	71,030
		15.9		15.0		15.8	10.6
1945-1964	11,870	8.4	1,300	26.5	13,170	4,910	141,360
		14.7		9.5		13.9	12.2
1965-1980	13,720	8.1	1,020	23.2	14,740	4,390	169,250
		17.0		7.4		15.6	10.9
Post 1980	20,100	9.6	2,180	24.1	22,280	9,030	209,550
		24.9		15.9		23.5	22.4
Total	80,870	11.5	13,750	34.1	94,620	40,300	705,000
		100.0		100.0		100.0	100

Table A5: Dwelling Age, All tenures (2006)

	Owner Occupied		Private Rented and Other		Housing Executive		Housing Association		Vacant		Total
	No	%	No	%	No	%	No	%	No	No	%
Pre 1919	69,510	61.1	22,300	19.6	2,400	2.1	1,910	1.7	17,690	113,810	100.0
		14.8		27.6		2.6		8.9		43.9	16.1
1919-1944	49,310	69.4	12,890	18.1	3,630	5.1	920	1.3	4,280	71,030	100.0
		10.5		15.9		3.9		4.3		10.6	10.1
1945-1964	96,120	68.0	11,870	8.4	27,960	19.8	500	0.4	4,910	141,360	100.0
		20.5		14.7		29.9		2.3		12.2	20.1
1965-1980	110,000	65.0	13,720	8.1	40,330	23.8	810	0.5	4,390	169,250	100.0
		23.5		17.0		43.2		3.7		10.9	24.0
Post 1980	143,920	68.7	20,090	9.6	19,120	9.1	17,390	8.3	9,030	209,550	100.0
		30.7		24.9		20.5		80.8		22.4	29.7
Total	468,860	66.5	80,870	11.5	93,440	13.3	21,530	3.1	40,300	705,000	100.0
		100		100		100		100		100	100.0

Table A6: Dwelling Age PRS (2001 and 2006)

	2001		2006	
	No	%	No	%
Pre 1919	18,870	38.2	22,300	27.6
1919 - 1944	10,220	20.7	12,890	15.9
1945 - 1964	7,040	14.2	11,870	14.7
1965 - 1980	5,870	11.9	13,720	17.0
Post 1980	7,410	15.0	20,090	24.9
Total	49,410	100	80,870	100.0

Table A7: Dwelling Type (2006)

	Occupied PRS		Vacant PRS		Total PRS (incl vacants)	Total Vacant Stock	Total Stock
	No	%	No	%	No	No	No
Bungalow	11,440	7.2	2,250	23.7	13,690	9,510	159,930
	14.1		16.4		14.5	23.6	22.7
Terraced House	37,090	16.5	3,980	41.8	41,070	9,520	225,380
	45.9		28.9		43.4	23.6	32.0
Semi-Detached House	16,280	11.5	2,480	41.1	18,770	6,030	141,240
	20.1		18.1		19.8	15.0	20.0
Detached House	6,740	5.5	1,170	15.5	7,910	7,550	122,410
	8.3		8.5		8.4	18.7	17.4
Flat/Apartment	9,330	16.6	3,830	49.8	13,190	7,690	56,040
	11.5		28.2		13.9	19.1	7.9
Total	80,870	11.5	13,750	34.1	94,620	40,300	705,000
	100.0		100.0		100.0	100.0	100.0

Table A9: Dwelling Type PRS (2001 and 2006)

	2001		2006	
	No	%	No	%
Bungalow	9,800	19.8	11,440	14.1
Terraced House	19,630	39.7	37,090	45.9
Semi-Detached House	7,920	16.0	16,280	20.1
Detached House	5,000	10.1	6,740	8.3
Flat/apartment	7,060	15.1	9,320	11.5
Total	49,410	100	80,870	100

Table A10: Unfitness in PRS (2006)

	Occupied PRS		Vacant PRS		Total PRS (incl vacants)	Total Vacant Stock	Total Stock
	No	%	No	%	No	No	No
Unfit	2,160	8.9	3,230	23.2	53,890	13,910	24,160
		2.7		23.5		5.7	34.5
Fit	78,710	11.6	10,520	39.9	89,230	26,390	680,840
		97.3		76.5		94.3	65.5
Total	80,870	11.5	13,750	34.1	94,620	40,300	705,000
		100.0		100.0		100.0	100.0

Table A11: Unfitness all Tenures (2006)

	Unfit		Fit		Total	
	No	%	No	%	No	%
Owner Occupied	7,500	1.6	461,360	98.4	468,860	100.0
		31.0		67.8		66.5
Private Rented	2,160	2.7	78,710	97.3	80,870	100.0
		8.9		11.6		11.5
Housing Executive	500	0.5	92,940	99.5	93,440	100.0
		2.1		13.7		13.3
Housing Association	90	0.4	21,440	99.6	21,530	100.0
		0.4		3.1		3.1
Vacant	13,910	34.5	26,390	65.5	40,300	100.0
		57.6		3.9		5.7
Total	24,160	3.4	680,840	96.6	705,000	100.0
		100		100		100.0

Table A12: Unfitness by dwelling age (2006)

	Unfit	Fit	Total Occupied PRS
Pre 1919	1,150	21,140	22,300
	53.5	26.9	27.6
Post 1919	1,000*	57,570	58,570
	46.4*	73.2	72.5
Total	2,160	78,710	80,870
	100	100	100

Table A13: Unfitness by Dwelling type (2006)

	Unfit	Fit	Total Occupied PRS
Bungalow	600*	10,830	11,440
	27.9*	13.8	14.1
Terraced House	1,010*	36,080	37,090
	46.9*	45.8	45.9
Semi-Detached House	150*	16,140	16,280
	6.7*	20.5	20.1
Detached House	160*	6,580	6,740
	7.4*	8.4	8.3
Flat/Appt	240*	9,080	9,320
	11.0*	11.5	11.5
Total	2,160	78,710	80,870
	100	100	100

Table A14: Unfitness by Age of Head of Household (2006)

	Unfit	Fit	Total Occupied PRS
Under 60	850*	62,640	63,490
	39.9*	80.6	79.5
Over 60	1,280	15,090	16,370
	60.0	19.4	20.5
Total	2,130	7,7730	79,860
	100	100	100

Table A15: Unfitness by Income (2006)

	Unfit	Fit	Total Occupied PRS
Under £10,000	1,620	32,740	34,370
	76.0	42.0	43.0
Over £10,000	510*	44,990	45,500
	24.0*	57.9	56.9
Total	2,230	77,730	78,860
	100	100	100

Table A16: Repair Costs, all tenures (2001 and 2006)

	2001		2006	
	Urgent	Basic	Urgent	Basic
	Mean (£)	Mean (£)	Mean (£)	Mean (£)
Owner Occupied	788	1,107	677	940
Private Rented	1,292	1,675	1,017	1,360
Housing Executive	304	398	243	329
Housing Association	226	255	88	146
All Occupied	706	980	638	880
Vacant	8,891	9,763	10,565	11,304
Total	1,124	1,427	1,206	1,476

Table A17: Central heating (2001 and 2006)

	2001		2006	
	PRS	Total Stock	PRS	Total Stock
CH Gas	2,580	26,210	9,370	83,990
	5.2	4.1	11.6	11.9
CH Oil	26,750	377,770	58,310	495,560
	54.1	58.3	72.1	70.3
CH Solid Fuel	5,960	92,340	3,090	32,900
	12.1	14.3	3.8	4.7
CH Electric	5,790	8.3	4,480	36,910
	11.7	53,970	5.5	5.2
CH Dual	2,890	9.5	4,630	38,540
	5.9	61,510	5.7	5.5
CH Other	420	3,560	220	4,320
	0.9	0.6	0.3	0.6
Yes - central heating	44,390	95.0	80,100	692,220
	89.8	615,360	99.0	98.2
No - central heating	5,020	5.0	770	12,780
	10.2	32170	1.0	1.8
Total	49,410	647,530	80,870	705,000
	100.0	100.0	100.0	100

Table A18: Double Glazing Private Rented Sector (2001 and 2006)

	PRS		Total		PRS	Total
	2001		2001		2006	2006
	No	%	%	No	%	%
Full	16,110	32.6	46.7	48,410	59.9	67.5
Partial	11,950	24.2	22.1	17,870	22.1	18.5
None	21,350	43.2	31.3	14,590	18.0	14.0
Total	49,410	100.0	80,870	100	100.0	100.0



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