

STATISTICAL BRIEFING

2022/23



SAFEDEPOSITS SCOTLAND

is a Custodial tenancy deposit protection scheme. It is a separate company where TDS Group is the key partner and provides the scheme's key operational services.

SDS RESOLVE

is a mediation service helping landlords and tenants resolve issues arising during a tenancy.

TDS NORTHERN IRELAND

is a wholly-owned subsidiary of TDS, providing both Custodial and Insured tenancy deposit protection.

EXECUTIVE SUMMARY

This Statistical Briefing provides data on the work of the tenancy deposit schemes across the UK; in England & Wales, Scotland, and Northern Ireland. In each jurisdiction there are three government authorised schemes which operate the statutory tenancy deposit protection and dispute resolution services.

TENANCY DEPOSIT SCHEME

is operated by TDS Group providing tenancy deposit protection in England and Wales. It offers both Insured deposit protection, TDS Insured, and Custodial deposit protection, TDS Custodial.

TDS RESOLUTION

is a mediation service helping landlords and tenants resolve issues arising during a tenancy.

TENANCY REDRESS SERVICE

is a dedicated redress scheme open to tenants of participating landlord members of the National Residential Landlords Association.

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1 **TENURE IN ENGLAND AND WALES**



YEAR	OWNER OCCUPATION	SOCIAL RENTING	PRIVATE RENTING
2001	14,735	4,339	2,133
2002	14,846	4,310	2,197
2003	14,752	4,212	2,549
2004	14,986	4,120	2,578
2005	15,100	4,050	2,720
2006	15,052	4,034	2,987
2007	15,093	4,013	3,182
2008	15,067	4,000	3,443
2009	14,968	4,022	3,705
2010	14,895	4,032	3,912
2011	14,827	4,044	4,105
2012	14,754	4,068	4,286
2013	14,685	4,100	4,465
2014	14,674	4,012	4,623
2015	14,684	4,030	4,773
2016	14,801	4,009	4,832
2017	15,050	4,102	4,798
2018	15,311	4,088	4,773
2019	15,544	4,108	4,762
2020	15,739	4,120	4,799
2021	15,445	4,092	4,680

TABLE 1
Tenure in England
(Millions of homes)

Source
Housing Review JRF/CIH

Between 2001 and 2016 the number of privately rented homes in England increased sharply. However, since then, the numbers have remained relatively stable, and between 2020 and 2021 they decreased slightly. Increased demand for privately rented homes would therefore lead to a growing mismatch between the supply and demand of available properties.

YEAR	OWNER OCCUPATION	SOCIAL RENTING	PRIVATE RENTING
2001	0.941	0.243	0.090
2002	0.957	0.240	0.089
2003	0.966	0.233	0.097
2004	0.980	0.226	0.103
2005	0.990	0.223	0.108
2006	0.998	0.222	0.113
2007	1.002	0.221	0.122
2008	1.001	0.221	0.135
2009	0.989	0.220	0.157
2010	0.983	0.221	0.171
2011	0.980	0.230	0.181
2012	0.977	0.223	0.191
2013	0.983	0.233	0.190
2014	0.981	0.223	0.196
2015	0.974	0.224	0.208
2016	0.986	0.224	0.202
2017	0.990	0.226	0.203
2018	0.994	0.227	0.204
2019	0.996	0.229	0.207
2020	1.003	0.230	0.205
2021	0.979	0.221	0.204

TABLE 2
Tenure in Wales
(Millions of homes)

Source
Housing Review JRF/CIH

The data shows a slight decrease in the number of privately rented homes since 2020. However, the numbers have remained relatively stable since 2016.



FIGURE 1
Private Renting and Social Renting in England
(Homes in millions)

Source
Housing Review JRF/CIH



FIGURE 2
Private Renting and Social Renting in Wales
(Homes in millions)

Source
Housing Review JRF/CIH

2 PRIVATE RENTED HOUSING PRICES IN ENGLAND AND WALES



FIGURE 3
Annual rental price percentage change in England (since 2012)

Source
Office for National Statistics

In England, private rental prices increased by **4.6%** in the 12 months to March 2023.

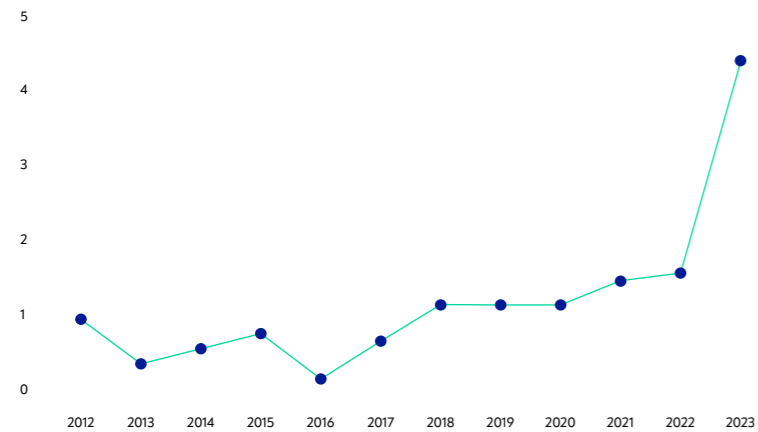


FIGURE 4
Annual rental price percentage change in Wales (since 2012)

Source
Office for National Statistics

Private rental prices in Wales increased by **4.4%** in the 12 months to March 2023.

3 TENANCY DEPOSITS IN ENGLAND AND WALES

In England and Wales, deposits taken on Assured Shorthold Tenancies (AST's) must be protected in a Government approved tenancy deposit protection (TDP) scheme. Tenancy deposit protection legislation came into force in April 2007 and over the years there has been a steady increase in the number of tenancy deposits protected, reflecting the increase in the size of the private rented sector.

The table below (Table 3) illustrates the growth of tenancy deposits protected in England and Wales in both Insured and Custodial schemes since March 2009.

YEAR	TOTAL DEPOSITS PROTECTED
March 2009	1,553,130
March 2010	1,888,532
March 2011	2,220,543
March 2012	2,374,385
March 2013	2,659,301
March 2014	2,848,110
March 2015	3,066,130
March 2016	3,425,718
March 2017	3,691,242
March 2018	3,840,216
March 2019	3,979,202
March 2020	4,141,467
March 2021	4,242,373
March 2022	4,459,606
March 2023	4,685,417

TABLE 3
Number of tenancy deposits protected in England and Wales

Source
FOI Data

YEAR	VALUE OF TENANCY DEPOSITS
March 2009	£1,406,482,263
March 2010	£1,661,896,693
March 2011	£2,104,219,832
March 2012	£2,325,317,355
March 2013	£2,637,843,361
March 2014	£2,865,824,221
March 2015	£3,187,501,867
March 2016	£3,566,784,769
March 2017	£4,017,045,899
March 2018	£4,159,663,783
March 2019	£4,408,543,068
March 2020	£4,307,902,071
March 2021	£4,348,937,027
March 2022	£4,531,196,470
March 2023	£4,905,089,207

TABLE 4
Total value of tenancy deposits protected in England and Wales

Source
FOI Data



FIGURE 5
Tenancy Deposits Protected compared to the number of Private Rented Sector homes in England and Wales since March 2009

Source
FOI Data

The number of tenancy deposits has increased alongside the growth of the private rented sector in England and Wales.

The gap between the number of deposits protected and the number of privately rented homes exists partly because some tenancies are exempt from the requirement to protect a deposit, such as regulated tenancies. Some landlords may have also decided not to charge a deposit.

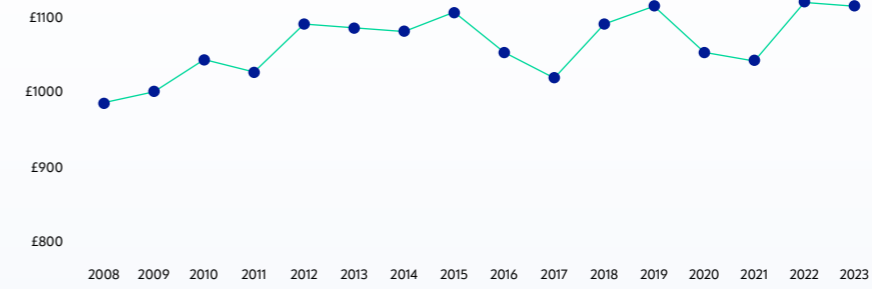


FIGURE 6
Average value of tenancy deposits protected in England and Wales

Source
FOI Data

It should be noted that these figures do not illustrate the large variations between regions in England and Wales. The drop in deposit values in 2020 is the result of the deposit cap which was introduced in England in June 2019.



4 DISPUTES

The legislation covering TDP in England and Wales provides for free alternative dispute resolution if the parties are unable to agree how the tenancy deposit should be divided at the end of the tenancy.

YEAR	DISPUTE PERCENTAGE	TOTAL DISPUTES
March 2009	0.05%	458
March 2010	0.52%	8,098
March 2011	1.08%	20,363
March 2012	0.82%	18,156
March 2013	0.85%	20,279
March 2014	0.92%	24,448
March 2015	0.88%	25,029
March 2016	0.89%	27,816
March 2017	0.82%	28,100
March 2018	0.83%	30,742
March 2019	0.85%	31,865
March 2020	0.89%	35,513
March 2021	0.84%	34,993
March 2022	0.70%	29,697
March 2023	0.78%	36,609

TABLE 5
Adjudications as a percentage of tenancy deposits protected in England and Wales

Source
FOI Data

TDP legislation was introduced, in part, in response to concerns that a significant minority of tenants felt that their tenancy deposit was unreasonably withheld and had experienced difficulty in getting their deposit back.

However, the consistent experience of the schemes is that disputes are raised in a low proportion of cases, typically fewer than 1% of tenancy deposits protected.

In 2020-2021 there was a reduction in the numbers of disputes because fewer tenancies were ending during the COVID-19 pandemic.

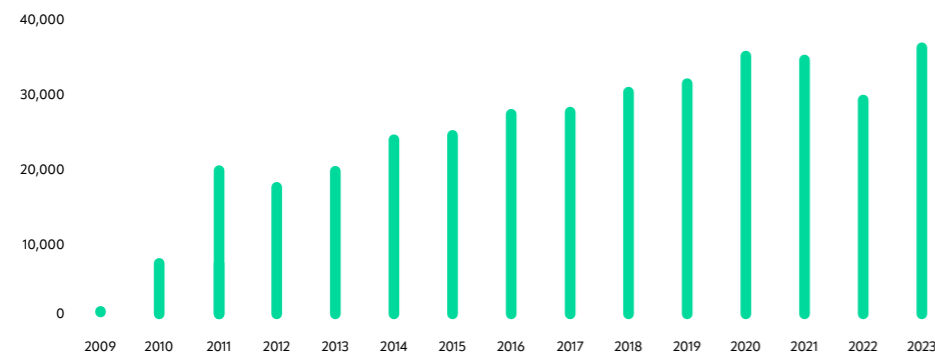


FIGURE 7
Adjudications completed by year, for all tenancy deposit schemes in England and Wales

Source
FOI Data

The table below (Table 6) shows the issues arising in TDS Insured dispute cases since 2017. Cleaning remains the most common area of dispute, appearing in over half of all cases in each year. Damage is the second most common reason for disputes.

DISPUTE	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Cleaning	54%	53%	42%	49%	50%	50%
Damage	49%	49%	41%	35%	46%	44%
Redecoration	31%	30%	39%	26%	28%	27%
Gardening	16%	15%	23%	12%	13%	13%
Rent arrears	20%	18%	14%	15%	13%	13%

TABLE 6
Reasons for tenancy deposit disputes in TDS Insured

Source
TDS Disputes Data

*Percentage of cases where claims arise

TDS Insured allows agents, landlords and tenants to raise disputes. Disputes in the Custodial scheme arise because the parties are unable to reach agreement during the repayment process and are not specifically raised by one party.

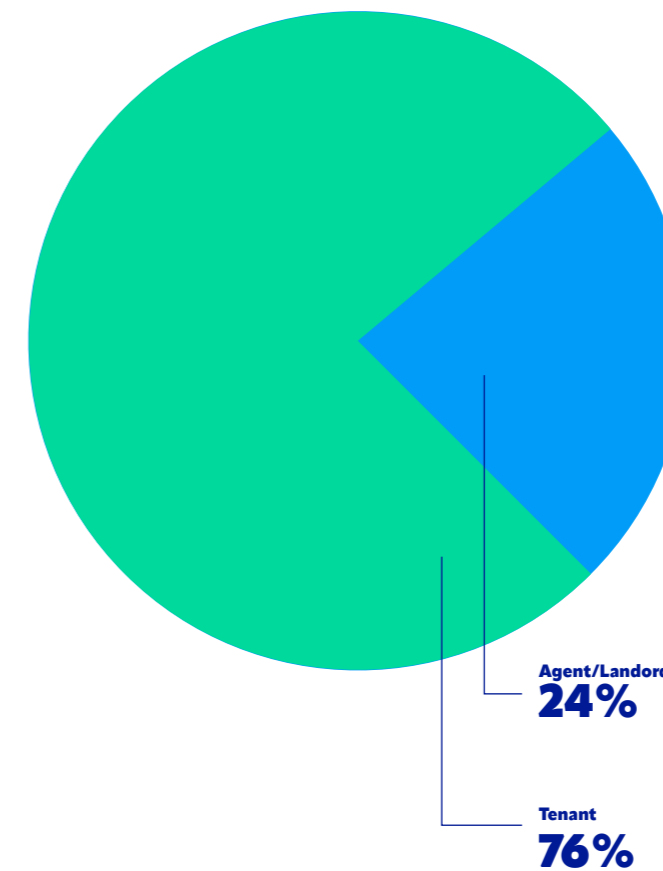


FIGURE 8
Who raises disputes with TDS Insured?

Source
TDS Disputes Data

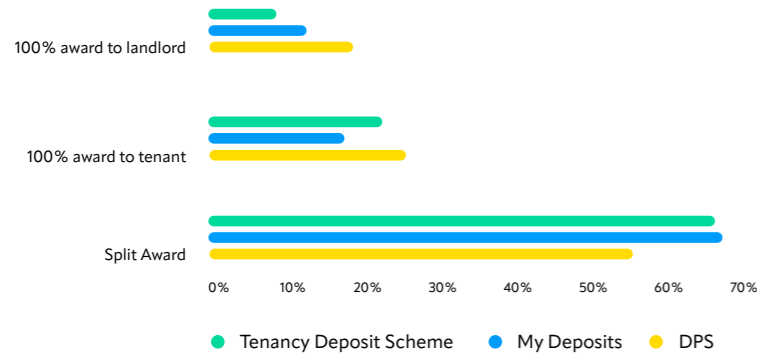


FIGURE 9
Award of disputed deposit in England and Wales, 2022-23

In England and Wales, across each of the deposit protection schemes, the most likely outcome from the adjudications is for the disputed deposit amount to be split between the landlord and tenant.

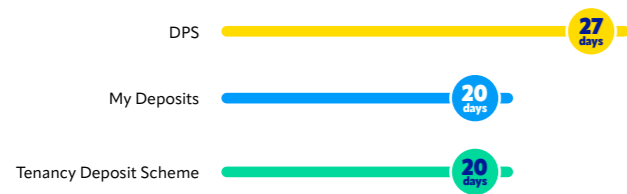
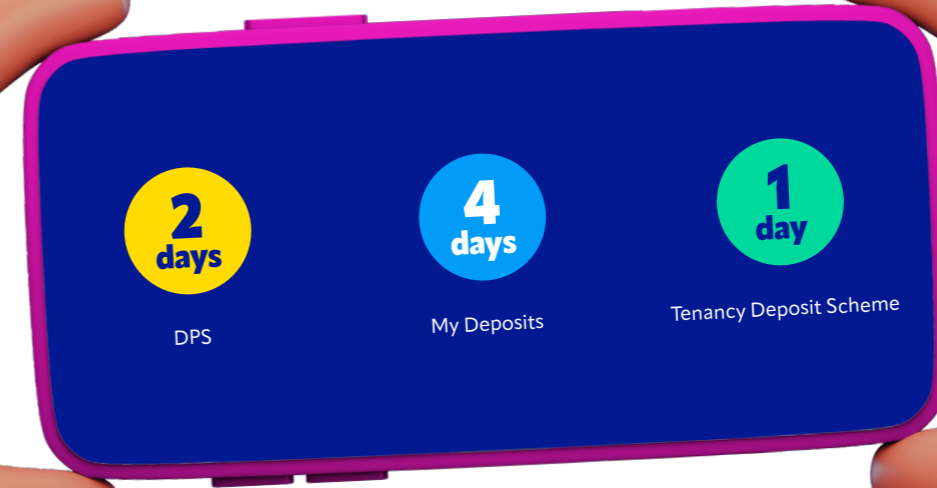


FIGURE 10
Average number of days taken to resolve disputes, 2022-23

In 2022-23, TDS and MyDeposits took, on average, **20 days** to resolve a dispute from the point that the adjudicator receives the papers. DPS took on average **27 days**.

FIGURE 11
Average number of days to return deposits from confirmation of release, 2022-23



In 2022/23 it took TDS, on average, 1 day to return the deposit following confirmation of release. On average, it took DPS 2 days and MyDeposits 4 days to return the deposit.



1 TENURE IN NORTHERN IRELAND

YEAR	OWNER OCCUPATION	SOCIAL RENTING	PRIVATE RENTING
2001	488	149	37
2002	481	140	47
2003	491	134	54
2004	501	122	61
2005	505	125	68
2006	508	122	76
2007	523	121	69
2008	524	123	83
2009	517	123	97
2010	521	125	106
2011	512	126	121
2012	514	124	121
2013	510	123	130
2014	513	124	130
2015	504	116	151
2016	510	115	152
2017	514	115	154
2018	521	116	153
2019	524	121	154
2020	531	126	151
2021	533	116	134

TABLE 7
Tenure in Northern Ireland (Thousands of homes)

Source
Housing Review JRF/CIH

The CIH study is based on estimates from the Family Resources Survey. The size of the sector may be underestimated due to the methodology and difficulties collecting data during the COVID-19 pandemic. Reflecting on the 2021 Census Data, other commentators* suggest that since 2016 the size of the private rented sector in Northern Ireland has remained unchanged at c150,000 households.

*Frey, J. (2023) Census 2021. Untangling the Data (Accessed 12/9/23)

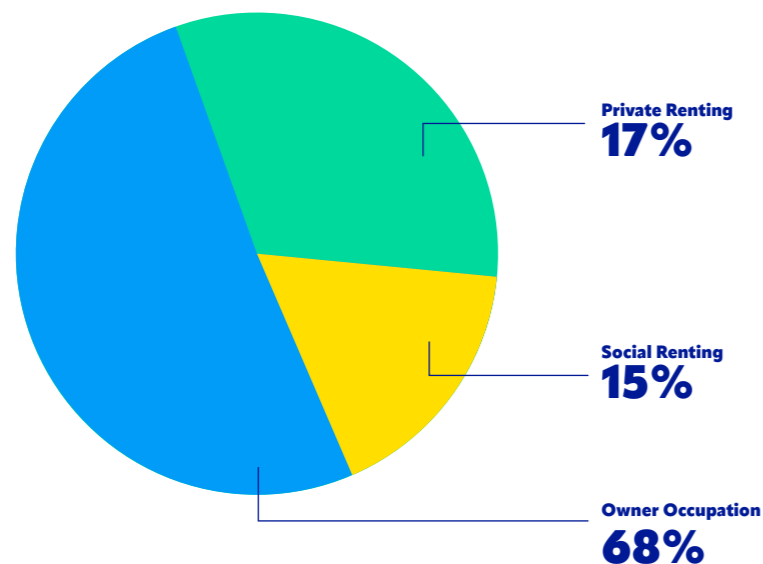


FIGURE 12
Tenure in Northern Ireland in 2021 (Percentage of homes)

Source
Housing Review JRF/CIH



FIGURE 13
Private Renting and Social Renting in Northern Ireland (Homes in thousands)

Source
Housing Review JRF/CIH

2 PRIVATE RENTED HOUSING PRICES IN NORTHERN IRELAND

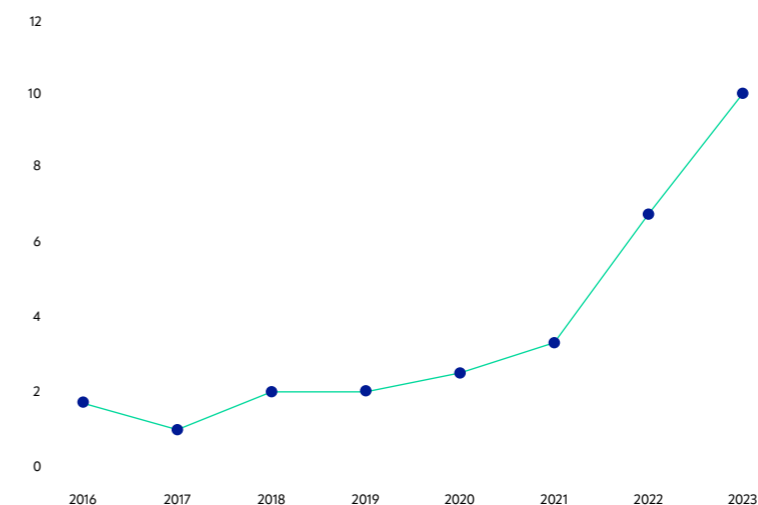


FIGURE 14
Annual rental price percentage change in Northern Ireland (since 2016)

Source
Office for National Statistics

Private rental prices in Northern Ireland increased by **10%** in the 12 months to March 2023.

3 TENANCY DEPOSITS IN NORTHERN IRELAND

In Northern Ireland, deposits taken for private tenancies must be protected in a Government approved tenancy deposit protection scheme. Tenancy deposit legislation came into force in April 2013 and there has been consistent growth in the number of tenancy deposits protected since.

YEAR	TOTAL DEPOSITS PROTECTED
March 2014	17,544
March 2015	32,722
March 2016	43,211
March 2017	49,102
March 2018	53,510
March 2019	56,786
March 2020	60,613
March 2021	63,905
March 2022	67,197
March 2023	69,087

TABLE 8
Number of tenancy deposits protected in Northern Ireland

Source
NI Department for Communities



FIGURE 15
Tenancy deposits protected compared to the number of Private Rented Sector homes in Northern Ireland

Source
NI Department for Communities

YEAR	VALUE OF DEPOSITS PROTECTED
March 2014	£9,901,267
March 2015	£18,757,501
March 2016	£23,430,569
March 2017	£28,405,824
March 2018	£31,395,767
March 2019	£34,064,162
March 2020	£36,759,231
March 2021	£39,388,442
March 2022	£43,092,615
March 2023	£46,774,577

TABLE 9
Total value of tenancy deposits protected in Northern Ireland

Source
NI Department for Communities

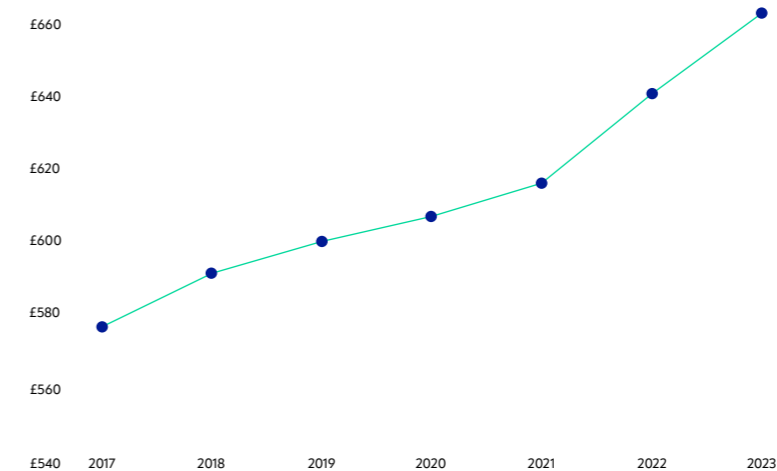


FIGURE 16
Average value of deposits protected in Northern Ireland

Source
NI Department for Communities



4 DISPUTES

Legislation covering tenancy deposit protection in Northern Ireland provides for free alternative dispute resolution if the parties are unable to agree how the tenancy deposit should be repaid at the end of the tenancy.

DISPUTES AS A PERCENTAGE OF TENANCY DEPOSITS PROTECTED

As the table below shows (Table 10), the TDP schemes consistently experience a very low proportion of dispute cases raised. Since 2014, the rate has ranged from **0.35%** to **1.14%**. This indicates that parties are generally successful in reaching agreement without the need to raise a dispute with the schemes.

YEAR	DISPUTE PERCENTAGE	TOTAL DISPUTES
March 2014	0.35%	62
March 2015	1.02%	335
March 2016	1.14%	492
March 2017	0.94%	461
March 2018	0.86%	460
March 2019	0.98%	556
March 2020	0.94%	568
March 2021	0.76%	487
March 2022	0.73%	488
March 2023	0.67%	460



TABLE 10
Adjudications as a percentage of tenancy deposits protected in Northern Ireland

Source
NI Department for Communities

FIGURE 17
Adjudications completed by year, for all tenancy deposit schemes in Northern Ireland

Source
NI Department for Communities

DISPUTE	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Cleaning	45%	45%	45%	42%	47%	47%
Damage	35%	38%	41%	40%	45%	37%
Redecoration	26%	28%	28%	27%	28%	26%
Rent arrears	26%	22%	24%	26%	22%	20%
Gardening	13%	10%	12%	12%	10%	12%

TABLE 11
Reasons for tenancy deposit disputes in TDS Northern Ireland

Source
TDSNI Disputes Data

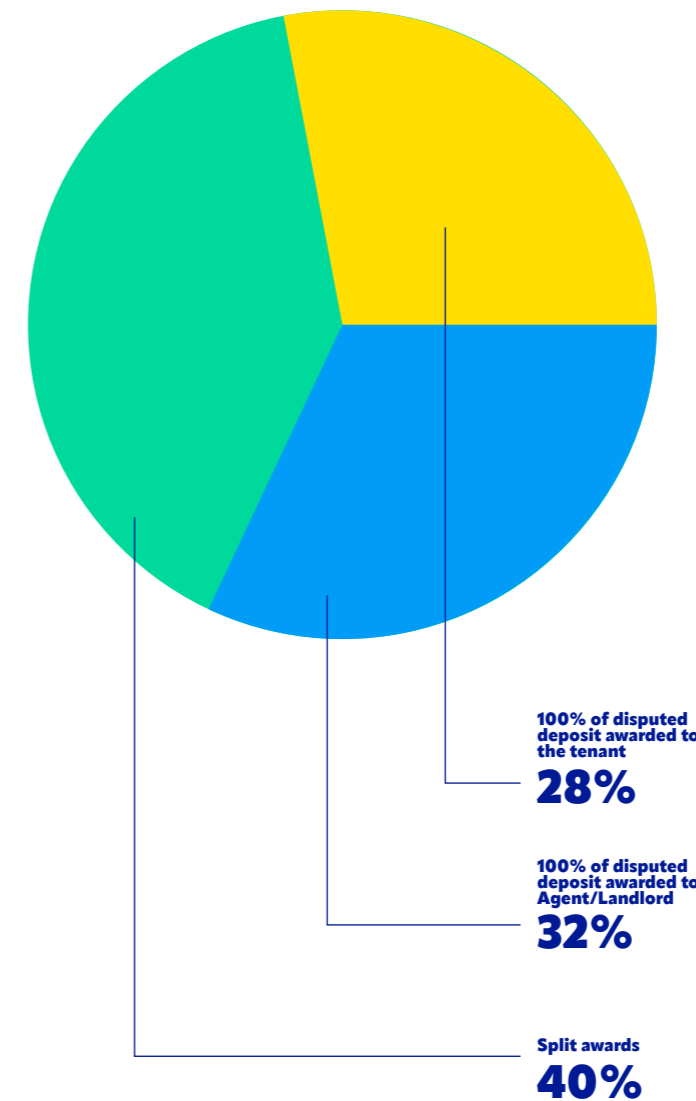


FIGURE 18
Allocation of Awards in Northern Ireland



1 TENURE IN SCOTLAND

YEAR	OWNER OCCUPATION	SOCIAL RENTING	PRIVATE RENTING
2011	1,580	595	320
2012	1,545	597	366
2013	1,537	596	389
2014	1,545	594	394
2015	1,552	595	402
2016	1,558	595	414
2017	1,502	594	393
2018	1,619	596	389
2019	1,653	603	389
2020	1,651	608	389
2021	1,662	550	384

TABLE 12
Tenure in Scotland
(Thousands of homes)

Source
Housing Review JRF/CIH

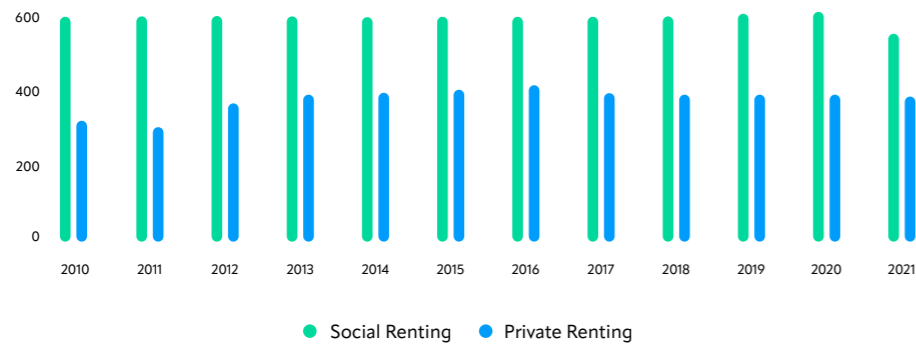


FIGURE 19
Private Renting and Social Renting in Scotland
(Homes in thousands)

Source
Housing Review JRF/CIH

2 PRIVATE RENTED HOUSING PRICES IN SCOTLAND

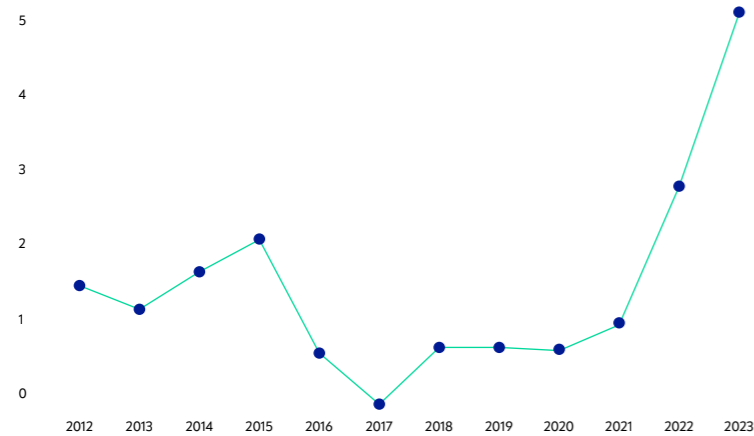


FIGURE 20
Annual rental price percentage change in Scotland (since 2012)

Source
Office for National Statistics

Private rental prices in Scotland increased by **5.1%** in the 12 months to March 2023.

3 AVERAGE DEPOSIT VALUE IN SCOTLAND

YEAR	AVERAGE VALUE OF DEPOSITS
March 2014	£668.20
March 2015	£657.68
March 2016	£669.66
March 2017	£667.57
March 2018	£674.52
March 2019	£686.81
March 2020	£710.25
March 2021	£733.64
March 2022	£748.75
March 2023	£745.64

TABLE 13
Average value of tenancy deposits protected in Scotland

Source
Scottish Government statistics

4 TENANCY DEPOSITS IN SCOTLAND

In Scotland, deposits taken for private tenancies must be protected in a Government approved tenancy deposit protection scheme. Tenancy deposit legislation came into force in April 2013 and there has been consistent growth in the number of tenancy deposits protected since.

YEAR	TOTAL DEPOSITS PROTECTED	VALUE
March 2014	149,639	£99,988,374
March 2015	171,466	£112,768,955
March 2016	186,070	£124,603,219
March 2017	202,514	£135,192,767
March 2018	211,955	£142,967,951
March 2019	219,629	£150,844,370
March 2020	221,834	£157,558,331
March 2021	220,791	£161,981,025
March 2022	248,129	£179,350,220
March 2023	259,779	£193,701,485

TABLE 14
Number and value of tenancy deposits protected in Scotland

Source
Scottish Government statistics

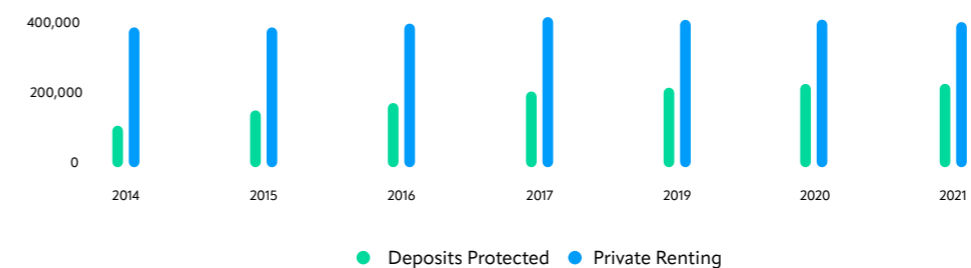


FIGURE 21
Tenancy deposits protected compared to the number of Private Rented Sector homes in Scotland

Source
Scottish Government statistics

5 DISPUTES

Legislation covering tenancy deposit protection in Scotland provides free alternative dispute resolution if the parties are unable to agree how the tenancy deposit should be divided at the end of the tenancy.

YEAR	DISPUTE PERCENTAGE	TOTAL DISPUTES
March 2014	1.69%	2,525
March 2015	2.64%	4,530
March 2016	2.67%	4,970
March 2017	2.80%	5,662
March 2018	2.79%	5,918
March 2019	2.80%	6,139
March 2020	3.01%	6,678
March 2021	2.27%	5,012
March 2022	1.90%	4,806
March 2023	PENDING DATA	PENDING DATA

TABLE 15
Adjudications as a percentage of tenancy deposits protected in Scotland

Source
Scottish Government statistics

Scotland follows a similar trend to the rest of the UK, with only a very small proportion of tenancies ending in a dispute about the return of the deposit.

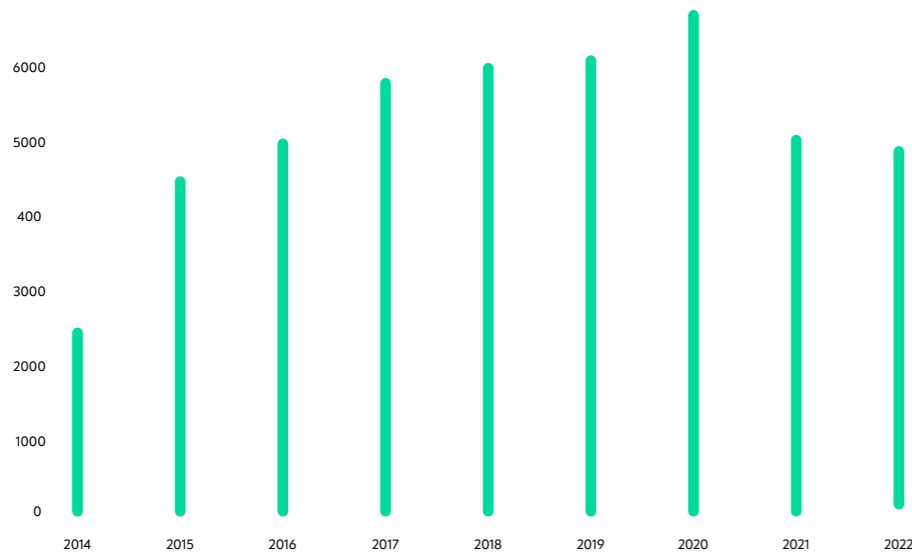


FIGURE 22
Adjudications completed by year, for all tenancy deposit schemes in Scotland

Source
Scottish Government statistics

DISPUTE	2018-19	2019-20	2020-21	2021-22
Cleaning	66%	69%	70%	71%
Damage	42%	42%	43%	46%
Redecoration	18%	21%	20%	25%
Rent arrears	18%	15%	9%	11%
Gardening	8%	9%	15%	8%

TABLE 16
Reasons for tenancy deposit disputes in SafeDeposits Scotland

Source
SafeDeposits Scotland statistics

*Percentage of cases where claims arise

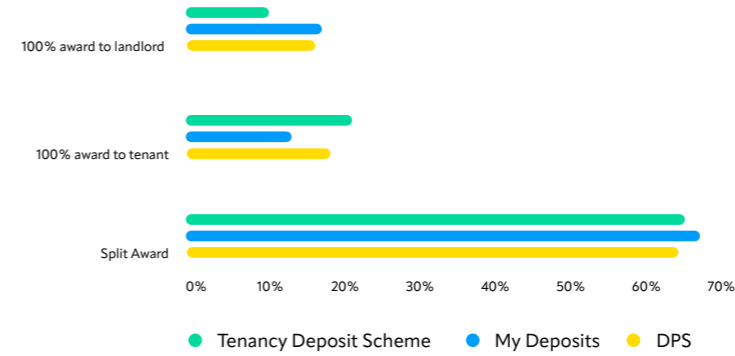


FIGURE 23
Award of disputed deposit in Scotland, 2021-22

In Scotland, across the 3 schemes the most likely outcome of adjudicator decisions is to split the disputed deposit between the landlord and tenant.





TDS GROUP

Established since 2003, TDS (The Dispute Service Ltd) is a not-for-profit company limited by guarantee. The two guarantors are the Royal Institution of Chartered Surveyors and Propertymark. TDS Northern Ireland Ltd is a wholly owned subsidiary of TDS. TDS holds a controlling interest in SafeDeposits Scotland Ltd and a non-controlling interest in Money Shield Ltd



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