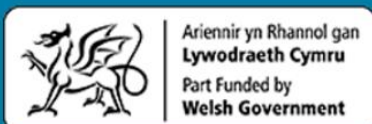




You matter | Ti'n cyfri

TPAS CYMRU'S NET ZERO AND ENERGY EFFICIENCY SURVEY

JUNE 2023



TENANT VOICE SPONSOR

Foreword

Croeso and welcome to TPAS Cymru's **third** annual Tenant Survey on Net Zero and Energy Efficiency. This annual survey is designed to examine tenant views on the decarbonisation agenda and behaviours since the cost-of-living crisis. We believe, as the tenant engagement organisation for Wales, that this report provides decision makers with impactful insight into what really matters to tenants regarding the Net Zero challenge.

We received an excellent response rate from across Wales from a wide range of tenures, including tenants of housing associations, local authority housing, supported housing, and tenants in the private rental sector. We believe the private renter voice is important in looking at the challenges, similarities, and differences in renter experiences.

This report provides clear evidence of perceptions of Net Zero and desires around landlord communication or Net Zero works. We hope that housing sector stakeholders will read this report and find a fresh perspective on Net Zero and the importance of involving tenants in this conversation.

I was particularly pleased that when we asked tenants if they would like to follow up this survey with 3 more in-depth focus groups that 16% gave their details to us.

Finally, I would like to thank all tenants who took the time to respond to this survey and gave us feedback on how we can improve this survey going forward. I have read all your comments and have listened.



David Wilton, Chief Executive, TPAS Cymru

Introduction to TPAS Cymru's Tenant Pulse

What is TPAS Cymru's Tenant Pulse? It's the national platform for Wales that enables tenants and renters to provide anonymous accounts of their experiences, thoughts and feelings relating to their homes and communities.

Surveys and reports currently take the following form:

1) **Annual surveys** - subjects we believe are important and need tracking. Currently, there are 2 annual surveys:

- o Energy and Net Zero survey
- o Annual 'What Matters' survey looking at what really matters to tenants and their communities

2) **Specific topical surveys** we develop with stakeholders such as Welsh Government and Partners to help bring insight to policy thinking.

3) **Specific audience surveys** – these are often not as visible as they are aimed at specific audiences e.g., PRS Tenants in North Wales on support options, housing association tenants on regulation reform etc.

4) **Topical short surveys** to gauge tenants' 'pulse' for issues we hear about.

We hope the findings and recommendations within this research offer valuable insight into the challenges tenants are experiencing and their thoughts on the Net Zero agenda. We believe that by listening to tenants and stakeholders being open, honest, and transparent, tenants can help deliver climate change objectives.

All reports are published on Tenant Pulse portal on our website. www.tpas.cymru/pulse

Background and Introduction to this survey

Wales has set the society goal to be Net Zero by 2050 but more immediate housing targets over next decade.

What is Net Zero? Net Zero is a target to completely negate the amount of greenhouse gases produced by human activity and is to be achieved by reducing emissions and implementing methods of absorbing carbon dioxide from the atmosphere. These challenges have led to the creation of several Welsh Government programmes to achieve Net Zero by 2050.

Net Zero has gained more tenant focus since the cost-of-living crisis in 2022, with tenants seeing a rise in energy bills and general costs. The Russian invasion of Ukraine, beginning in early 2022, brought a rise in wholesale energy prices, which households began to feel the impact of around April of 2022. The reality of the energy crisis was this: energy bills were inevitably going to increase during the winter which is the time at which most households turn on their heating more consistently.

Wales has some of the oldest housing stock, with most housing in Wales being built between 1932-1980. Because of this, many homes do not have proper insulation installed, causing a heat loss of 33% through the walls and 25% through the roof. Heating a home and the use of hot

water account for 3rd/4th the total amount of energy used in a home, and Net Zero asks the question of how this can be made cheaper while being friendlier for the environment.

This report explores the knowledge and awareness of tenants in Wales in relation to Net Zero and energy efficiency of their home. It investigates attitudes and perceptions of climate change, landlord communications with them about Net Zero solutions, changed behaviours in the last year, and the costs of Net Zero.

Key Findings

- Almost all respondents (96%) have changed their behaviours around energy usage in their home in the last year. The most common changed behaviour was reducing the heating (85%).
- 82% of respondents say they have not had any form of communication from their landlord regarding Net Zero or decarbonisation works that may be done to their property.
- There is a lack of awareness around Energy Performance Certificates, with 74% of respondents saying that they did not know what the Energy Performance Certificate rating was for their property.
- Many respondents (43%) felt that tenants should not have to pay for Net Zero works (for example through increased rents) and that they do not trust that the energy savings would equate to the increased rents.
- Many tenants shared that they were looking to alternate ways of heating their home and themselves, such as using a wood fire burner, working in bed, or going to sleep earlier to reduce feelings of being cold.

Authors: Hannah Richardson and Elizabeth Taylor
May 2023

Research Methods

Under the TPAS Cymru Tenant Pulse branding, using the Tenant Pulse platform (powered by QuestionPro online survey tool), TPAS Cymru shared 18 questions (see appendix 6) to the tenant & renter community in April 2023. Tenants from across Wales were asked about their thoughts and behaviours relating to Net Zero and energy efficiency, as well as the type of engagement they would like in the future in relation to decarbonising homes.

How the survey was promoted

- The survey was sent to tenants who have signed up to Tenant Pulse.
- We received communication support from social landlord and tenant groups to promote this survey to their tenants. This method creates some noticeable differences in tenant responses per landlord depending on the landlord's degree on engagement/promotion and their tenant demographic.
- This survey was also promoted on TPAS Cymru social media accounts, including Facebook, Instagram, Twitter, and LinkedIn (see appendix 8)
- As proved useful in our past Tenant Pulse surveys, we did a paid media advertisement for the survey on Instagram, to reach more responses from younger renters, i.e. aged 35 and below, as well as those who are a part of the private rental sector. We find these voices are not engaged in traditional tenant voice activities and give our survey a more diverse feel to it.
- We ran two paid advertising campaigns, the first campaign was targeted to younger respondents of all tenures, and reached 22,141 Instagram users, and caused 120 users to click on our TPAS Cymru website.
- The second campaign was targeted at young private rental sector tenants, and reached 36,177 users, led 375 users to our website, and resulted in four new Instagram followers to our page.
- In total, this Instagram campaign reached 58,318 users, an increase from our 2022 Annual Pulse survey, which had a total of 35,000 users reached.

Black, Asian & Minority Ethnic (BAME) background

2% of total tenants responding identified as having a Black Asian Minority Ethnic background. This is 1% decline in the representation of tenants from our 2022 Net Zero Survey on energy efficiency.

The figure held up much better for private renters and local authority, but this decline is mainly attributed to reduction in more diverse responses from housing association tenants, in particular some key landlords known for having a more diverse community.

As TPAS Cymru we will engage with staff, tenants and communities of these social landlords to ensure broader representation in future Tenant Pulse surveys.

Every response by someone identifying in this group was downloaded and personally reviewed by the lead author to consider the responses individually and collectively against the main response data. Unlike other Pulse surveys, no significant differences were found on attributes to energy crisis and decarbonisation.

Response summary

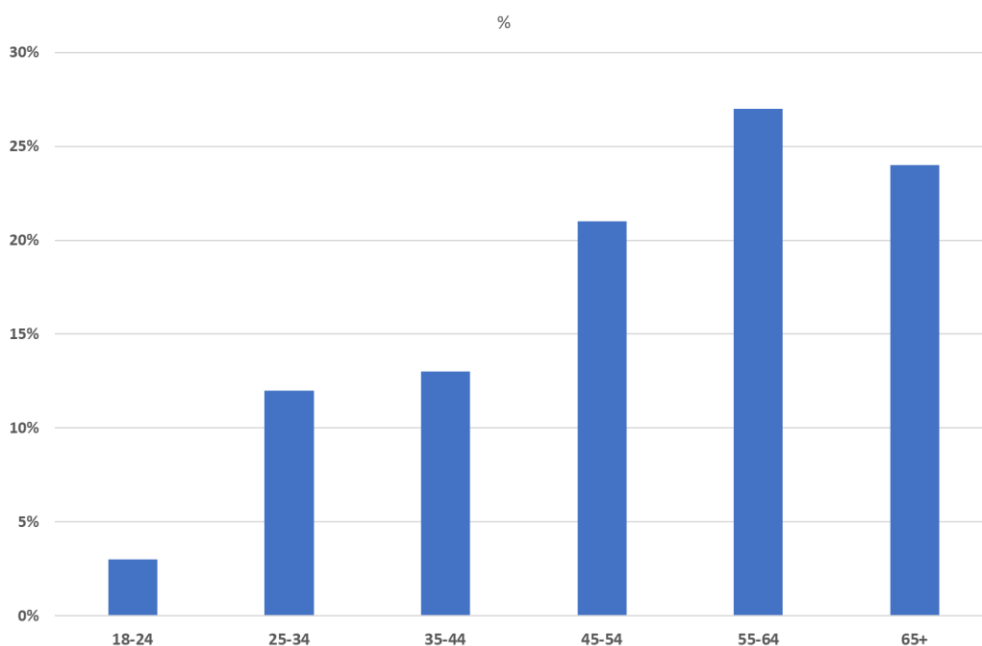
There was a total of 699 tenant respondents. All twenty-two counties in Wales are represented in this survey. Whilst we acknowledge that this is not representative of the whole tenant population, we are confident that the findings offer valuable insight.

As with previous Tenant Pulse surveys, most responses were from tenants living in housing associations (423), 93 Local Authorities, 156 private sector, 9 supported housing and 18 from other tenures. Local Authority responses have decreased over the year, whilst the PRS and supported housing remains the same.

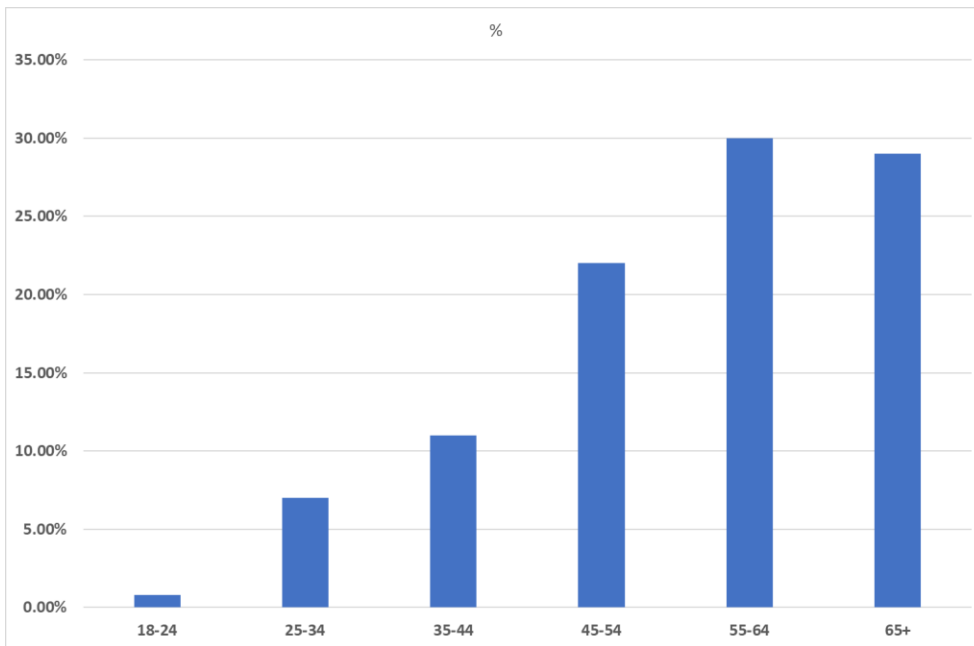
Highest responding areas	Lowest responding areas
1. Cardiff	1. Ynys Mon
2. Vale of Glamorgan	2. Wrexham
3. RCT	3. Denbighshire
4. Swansea	4. Flintshire
5. Blaenau Gwent	5. Monmouthshire
6. Carmarthenshire	6. Pembrokeshire

Age breakdown of respondents

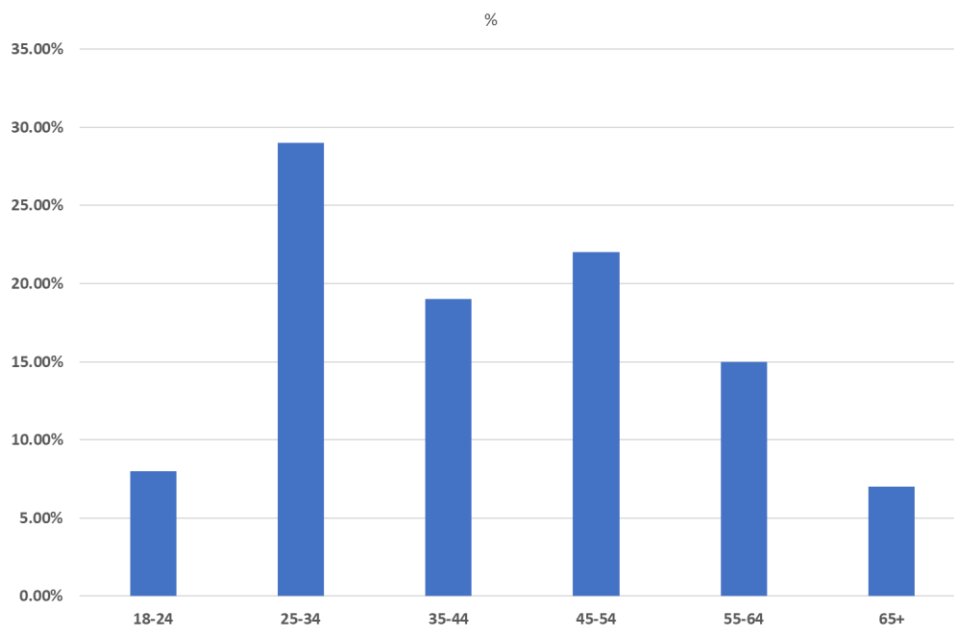
The breakdown in age was as follows:



The breakdown of age in social housing was as follows:



The breakdown of age in private housing was as follows:



There is a **significant difference in age demographics from responders in social housing compared to private housing tenants**. For example, looking at those aged 25-34, there is a difference between the two groups. In social housing, respondents aged 25-44 accounted for 7% of the response, whereas in private housing, those aged 25-44 accounted for 29% of the total PRS response.

Overall, our 2023 survey provides a more balanced response across all age groups when compared to our 2022 survey – something TPAS Cymru aims to reach through our Pulse platform. We hope to continue reaching the younger private housing sector tenants as we believe that their voices are needed to be heard.

Key Findings

- ✓ This survey had the **quickest response rate** after the initial launch compared our other Tenant Pulse surveys. It had the **largest response** rate of the three Net Zero surveys, with a 1% overall increase from last year, and a 43% increase since its launch in 2021.
- ✓ We had a wide demographic of tenants which included younger PRS tenants.
- ✓ The Instagram advert platform continues to perform in reaching wider and younger audiences.
- ✓ Similar to last year's survey, this survey predates the release of the 2023 Welsh Housing Quality Standards release and has captured transparent views and opinions from **tenants on their reality of Net Zero**.
- ✓ We introduced the option for follow up **focus groups** to explore the findings in more detail. 16% of respondents requested to take part in focus groups around:
 1. Tenants who have had Net Zero work done to their home – 39 tenants
 2. Tenants who have a strong interest in low carbon housing solutions – 40 tenants
 3. Tenants who want to feedback and give opinions on landlord communication with tenants on Net Zero – 43 tenants.
- ✓ There were **noticeable improvements** in responses from the Blaenau Gwent who have historically been the lowest responders. Conwy has traditionally been the county with high social housing and private sector representation; however, we have noticed a **considerable decline**.

Key Themes explored in this report

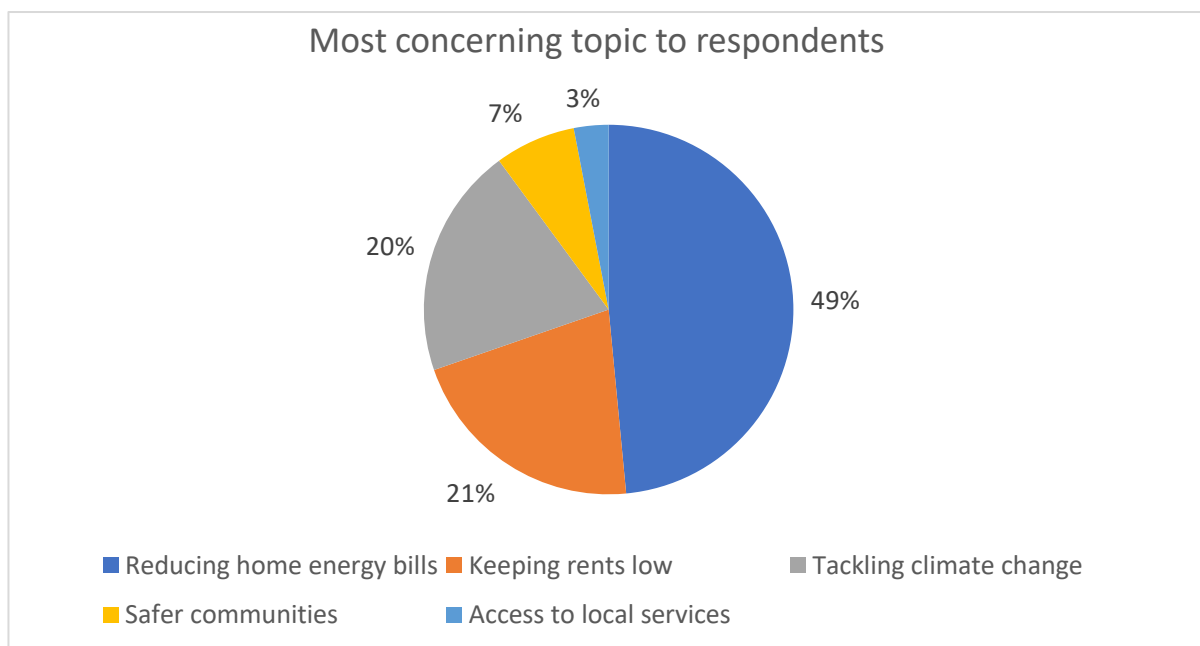
We identified five key themes within the findings:

1. Tenant concern around energy bills
2. Awareness and knowledge of Energy Performance Certificates (EPC)
3. Changed behaviours since the cost-of-living crisis
4. Landlord communication with tenants on Net Zero
5. Funding of Net Zero

1. Tenant concern around energy bills

We asked respondents to rate five sentences from most concerning to least concerning (details in appendix 6). 48% of respondents ranked 'reducing home energy bills' as their main concern, compared to keeping rents low, tackling climate change, safer communities, and access to local services.

There was no significant difference in type of tenure, and the top three most concerning topics remained the same throughout. There was also no significant difference in terms of age group. This confirms the assumption that while tenants are concerned about climate change, costs and affordability must be top priority.



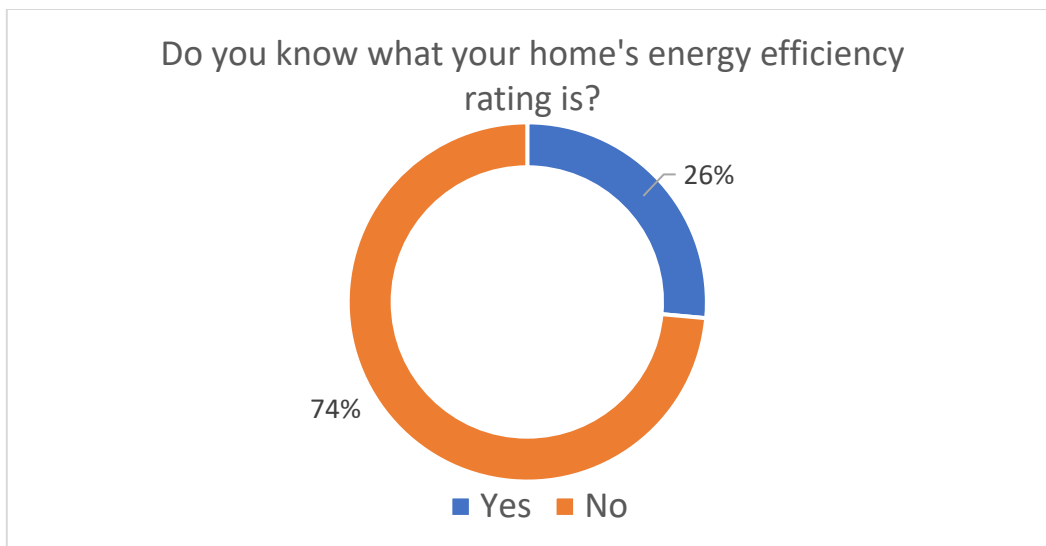
2. Awareness and knowledge of Energy Performance Certificates (EPC)

Energy Performance Certificates (EPC) shows how energy efficient a property is. EPC ratings are given to properties and are represented on a scale from A-G, A being most efficient, G being least efficient. All rented properties in the UK are required to have a valid EPC before a new tenant moves in, though they are not required to be updated when major works are done or when they expire.

We showed an image of an EPC rating chart and asked if respondents had seen a chart like this before. 90% of total respondents answered that they had seen an EPC chart before. But, when we asked if respondents knew what their own home's EPC rating was, 74% said that they did not know what it was.

The tenure with the highest percentage of respondents who know their homes EPC rating was from the private rented sector.

- 44% of PRS respondents answered that they knew their home's energy efficiency rating, compared to only 20% of housing association tenants and 23% of local authority tenants.
- The age group with the most respondents knowing their EPC rating was those ages 18-34, with 38% responding 'yes.' Respondents aged 65+ were the age group who knew least about their EPC, with only 20% stating that they knew their home's rating.

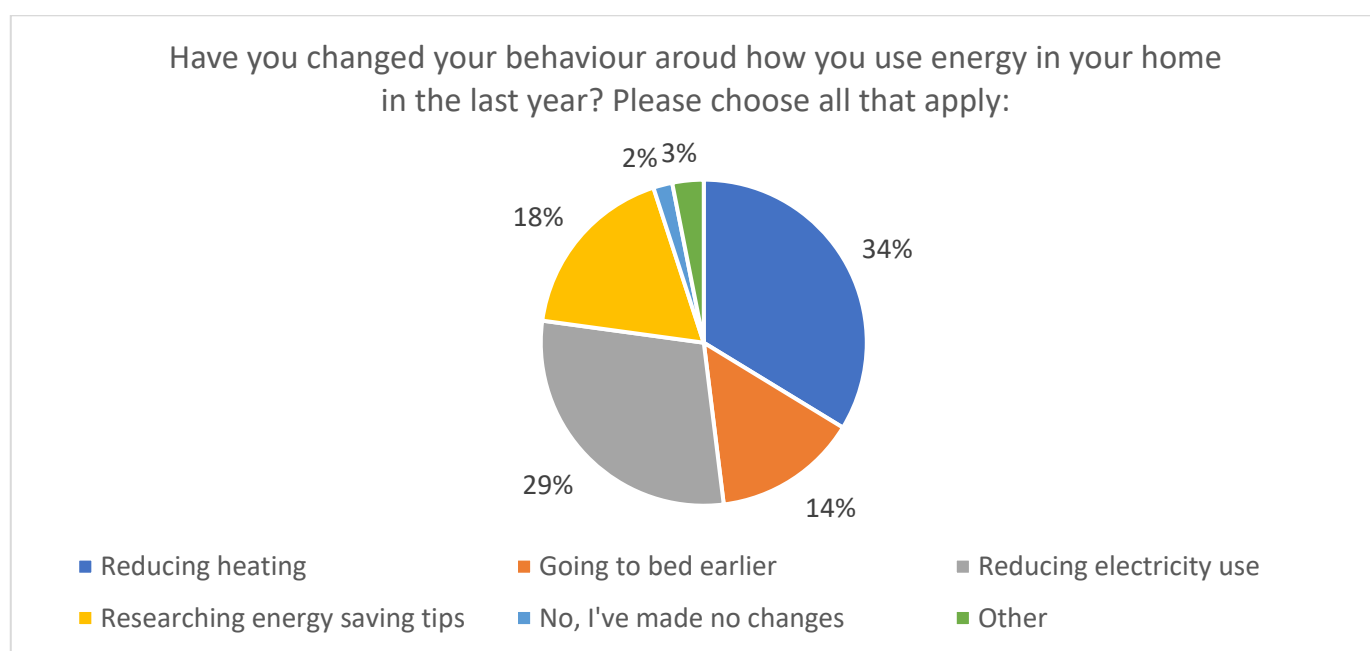


3. Changed behaviours since the cost-of-living crisis

Oil and electricity prices drastically rose in 2022, with many economies starting back up again after covid restrictions, and the invasion of Ukraine caused countries to switch demand from Russian imports to elsewhere. As the UK entered the winter season, energy prices were predicted to rise by 80%, causing many tenants in various TPAS Cymru forums and event discussions to be concerned about affordability, safety, and wellbeing.

Curious about changed behaviours since March 2022, we asked survey respondents about any changes that they have made to their daily life to reduce their energy bills. 85% of respondents said that they had reduced their heating more, whether that's the temperature set or for how long the system is running. On the other hand, 5% of respondents answered that they had not made any changes in the last year.

When focusing on respondents who had answered previously that they were most concerned about reducing home energy bills, 90% of them responded that they had reduced their heating more in the last year and 77% of this same group answered that they had reduced their electricity use. There was no statistically significant difference in response by age group or tenure type.



If respondents chose to respond 'Other,' we gave them the opportunity to expand on their thoughts and opinions with a comment box. There was a key theme identified around solutions used at home to improve their energy costs and stay warm.

"I use a thermos to save boiling the kettle. Reduce my showers, reduce my laundry. Heaters are off in the rooms that I'm not in."

"Using the cooker less often, buying meals that cook quicker, especially in an air fryer."

"Cooking outdoors on wood, wearing more layers, bed sharing with the children."

Some respondents answered that they had not made any changes to their behaviours around energy in the last year due to various circumstances:

"I need to have the heating on due to my disability."

"My partner is undergoing chemotherapy, so her comfort is paramount."

"I am already carrying out all energy changes available while maintaining my health and sanity."

Follow up question:

Respondents were also asked if they had made any of these **six low carbon changes** in the past year compared to previous years including:

1. Shopped at charity shops
2. Cooked at home
3. Bought local produce
4. Walked, cycled, or got a lift instead of driving yourself somewhere
5. Used recycle and reuse sites
6. Changed shopping habits to reduce costs

The total survey population had not changed habits in the last year, except for changing shopping habits to reduce costs. 61% had changed their habits more to reduce their overall costs. When looking at age, there was a significant difference in the respondents aged 25-34. Respondents of this group answered that they had shopped at charity shops, cooked at home, and changed shopping habits to reduce costs more compared to the previous year.

In comparison, those aged 55+ had no changes compared to the previous year except for changing their shopping habits more to reduce costs.

4. Landlord communication with tenants on Net Zero

As previously mentioned, Wales has some of the oldest housing stock, which can make retrofitting more challenging. Depending on the work that needs to be done, properties may need new radiators, upgraded windows, insulation work, etc. The work is attempting to make the property more energy efficient, and thus reduce energy bills; but this can take time and cause disruption to residents.

Welsh Housing Quality Standard

The second version of the Welsh Housing Quality Standard was released for consultation last year, and many aspects of the new Standard included goals to get Wales to Net Zero. Net Zero has a target in Wales by 2050, but in housing that target is much sooner. TPAS Cymru has already seen landlords taking innovative routes of communication and engagement with their tenants, so we wanted to understand what form of communication has been most used.

Zero Communication with Landlords

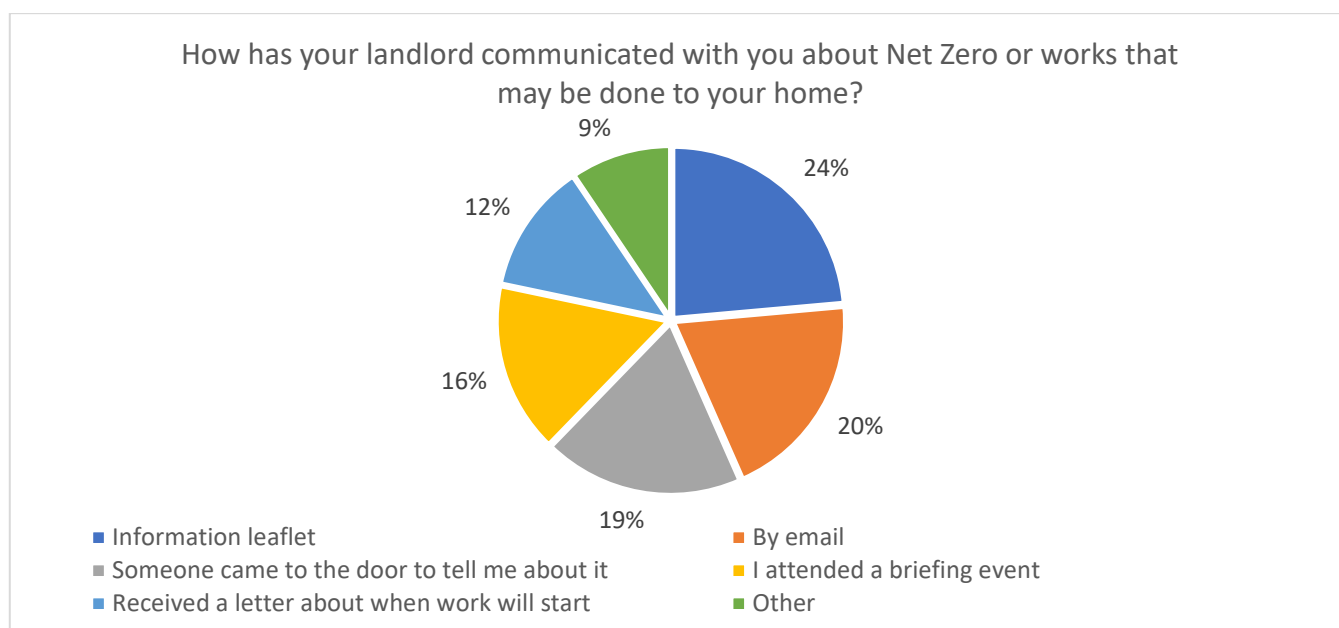
First, we asked survey respondents to tell us if their landlord had communicated with them about Net Zero/decarbonisation works that might be done. 86% of total respondents answered that they had not received any communication from their landlord. Supported housing tenants had the highest percentage of respondents who answered 'yes,' with 70% saying that they had received some communication with their landlord about Net Zero works. Tenants in the private rented sector had the lowest percentage, with only 3% stating that they had received Net Zero communications.

Supported Housing has More Communication than Other Tenures

It is important to note that there are multiple reasons as to why supported housing tenants may have more Net Zero communication from their landlords. First, there were fewer total responses from supported housing tenants (9) compared to other tenures, so these responses only make up 1% of the total response rate. Tenants in supported housing are more likely to see staff consistently from day to day, and therefore more consistent streams of communication. In other supported housing schemes, we have seen communal solutions as opposed to individual solutions, creating a greater likelihood of letters or posters telling tenants what heating solutions will be installed.

Different Types of Communication

We were curious to learn about the most popular ways that landlords are communicating with their tenants about Net Zero works. From the respondents who had said that they had received communication from their landlord, 32% had received an information leaflet, 26% of that same group had received an email about Net Zero, and 25% said that someone had come to the door to tell them about the works.



There was an opportunity for respondents to expand on their response, and some tenants explained the work that had been done or other sorts of events that they had attended:

"The house has been insulated. I question the 'green' aspect of the installation. No consideration was taken for the environment during the works and the materials were thrown into skips at an alarming rate. 80% of each bag was thrown away."

"A briefing event occurred for the initial installation of the heat pump, but the later installation had no consultation at all."

"I have only attended TPAS Cymru events on Net Zero."

"It was mentioned in the latest newsletter."

5. Funding of Net Zero

During the Net Zero training sessions that we run, the most common question is, **"Who is paying for Net Zero?"** There is an estimate that it will cost Wales roughly £5 billion for homes in the UK to be retrofitted in the next five years.

There are different solutions that have been raised by government officials and the housing sector, some including the **raising of rents** or **more funding** from Welsh Government. In theory, if a home is more energy efficient, tenants will be left to pay less in energy costs, but there is still scepticism around this.

We asked respondents for their opinions on where the money should be coming from to pay for Net Zero works. Out of the total number of respondents, 43% said that they did not think that tenants should have to pay more for low carbon homes. Two of the other groups were almost evenly split with a different outlook on the same situation, with 25% responding that they would pay higher rents if there was a guaranteed decrease in bills, and 24% responding that they do not trust that the savings would be more than the rent increase. Only 7% responded that they'd pay higher rents for a more sustainable and low carbon home.

There were no significant differences in response according to type of tenure, age, or location.

Tenants could select 'Other,' and expand on their selection, one tenant noted:

"I wouldn't be able to afford more rent or anything. I am struggling now."

Conclusion

This survey was set out to investigate opinion and awareness of Net Zero in Wales along with the changing behaviours that have taken place because of the cost-of-living crisis. The report has shown that while tenants are, overall, concerned about climate change, there are other priorities that must be considered and improved first, such as keeping rents low and decreasing the price of home energy bills.

Lack of awareness around EPC

The awareness around energy performance certificates (EPC) showed that whilst tenants were aware of what the chart looks like, the majority of respondents did not know what their own rating was, and most tenants guessed their EPC rating was a D or E. Energy efficiency is directly linked to energy costs, so it can be beneficial for tenants to know what contributes to an EPC rating and how it impacts their own home and bills. Tenants would benefit from a greater awareness of the government website for people to look up their property's EPC rating, as currently this is not being utilised by tenants. (See appendix 7).

The impact of the cost-of-living crisis

The cost-of-living crisis has impacted many and caused a significant proportion of respondents to adapt or change their behaviours when it comes to heating their home. Tenants shared alternative methods that they've used to reduce energy consumption, such as wearing more layers, sharing the bed with their family, or using kitchen tools like air fryers and thermos instead of an oven. It seems clear that some tenants are reducing their day-to-day quality of life because of energy costs, and many people are reducing consumption to drastic levels in order to simply survive. Achieving Net Zero housing will cost billions of pounds a year, but this money will be wasted if tenants are not using these new systems to their full potential and are instead looking to other heating solutions to reduce costs.

Young people's perceptions

There is an assumption that younger people are more likely to feel more urgency around climate change, and this may be the reason there is an increase in carbon conscious behaviours amongst younger tenants. Though it is interesting to note that age did not impact the ranking of concerns; we can conclude that tenants are having to prioritise costs, which can be felt daily, as opposed to climate change which can feel like an issue that is too far away to currently consider.

Tenant Concerns

Landlord communication with tenants on Net Zero contributes to the success of the goal, as tenants will be living with these systems and operating them from day to day. Though there is an overall assumption that tenants are not interested in Net Zero, this report revealed a different reality, with 122 tenants answering that they would like to be included in a TPAS Cymru lead tenant focused group. Going forward, TPAS Cymru will run three tenant groups around Net Zero:

- 1. Tenants who have had Net Zero work done to their home – 39 tenants responded 'yes' to opting into this group.*
- 2. Tenants who have a strong interest in low carbon housing solutions – 40 tenants responded 'yes' to opting into this group.*

3. Tenants who want to feedback and give opinion on landlord communication with tenants on Net Zero – 43 tenants responded 'yes' to opting into this group.

It became clear that tenants were concerned about the funding practicalities behind Net Zero, and who it would fall to. Comments explained that many tenants are already facing difficulty paying for their bills and rents, and any possibility of an increase would not be welcomed. There was a lack of confidence of rent increases levelling out the potential energy savings that may take place if a low carbon heating solution was installed, which calls for a need in more case studies. Tenants did not trust that they would be saving any money with a heating solution that was not their boiler and felt that the funding of Net Zero should not fall to the tenants, which was consistent across tenure.

What needs to be done?

Overall, TPAS Cymru believes that tenants should be included in the Net Zero discussion and challenge, right now, not after the work has been completed. Tenants can and will contribute a necessary and needed voice for the solution. There is a level of distrust from tenants about Net Zero and tenants do not feel that they will directly benefit from the installation of low carbon solutions. We have heard consistently that tenants are turning off their new heating systems completely, which results in higher costs, and that some tenants are removing the systems completely from their homes. This comes down to tenant engagement, or lack of tenant engagement, and shows that Net Zero will not be successful and achieved if tenants are not involved at every step of the process. Every tenant has different needs, communication styles, and ways of living in their homes, and unless each tenant is engaged, there will not be a Net Zero Wales.

Recommendations

1. We would like to see much better production and sharing of case studies with tenants, whether that is tenant to tenant case studies, or overall project case studies. It is crucial that the sector is learning from one another, especially when it comes to the Optimized Retrofit Programme.
2. Landlords should be communicating with their tenants on Net Zero/decarbonisation from the beginning until the end. Even if landlords are unsure what specific Net Zero solution they are installing into homes, tenants need to be engaged with on what Net Zero is and why they are seeing works being done across Wales.
3. As the Welsh Housing Quality Standards for 2023 has not yet been released, TPAS Cymru would like to see the stronger focus and inclusion of tenant voice and engagement guidelines as well as a baseline standard for how landlords need to be consulting with tenants on Net Zero.
4. Tenants in this survey expressed a real interest in being a part of our focus groups revolving Net Zero, and RSL's and LA's should be offering information sessions or places for tenants to engage with Net Zero. There is an assumption that tenants do not have an interest to be a part of such groups, but this survey demonstrated otherwise. We would welcome interest from landlords and sector suppliers who wish to support this groups.
5. Trust is a huge issue for tenants. We strongly recommend developing relationships with tenants prior to attempting any form of decarbonisation to their homes. Tenants must be a part of this journey to Net Zero.

Next Steps

Tenants have given time to give their views in this survey.
Their voices matter and deserve your consideration and action.

- 1) All tenants who completed the survey and opted to receive a copy of the report will be sent a copy ahead of publication.
- 2) We will be sending this report to key decision makers across the housing sector including Welsh Government, Member of the Senedd (with an interest in housing), Housing CEOs and Heads of Service asking for their consideration and action.
- 3) TPAS Cymru will look for opportunities to present and discuss the findings withing sector and media to ensure stakeholders absorb and act on the report.
- 4) In addition, based on other TPAS Cymru's reports its likely we will be approached to present to tenant groups and staff teams across Wales. To request a session, please contact enquiries@tpas.cymru

We are very interested to know your views on this report and especially what action you took as result.

Acknowledgements

We would like to take this opportunity to thank our Tenant Pulse panel for their continuous inspiration and commitment to taking part in our surveys. Your input is truly valued and helps to shape the future of housing.

We would also like to thank Welsh Government for part funding TPAS Cymru as an organisation and to Wales & West for the year-round lead sponsorship.

About TPAS Cymru



TPAS Cymru has supported tenants and landlords in Wales for over 30 years developing effective tenant and community participation through training, support, practical projects and policy development. Locally we support community empowerment through practical advice, support, training and project work.

At Government level, we contribute to policy changes by working with partner organisations to ensure the tenant voice influences decision making.



Tenant Pulse is the voice of tenants in Wales. www.tpas.cymru/pulse. It's been created by TPAS Cymru and is supported by Welsh Government. We aim to:

- i) Find out what matters most to tenants
- ii) Release regular surveys
- iii) Hold prize draws to reward people who take part

The results of our surveys are used by decision makers to create housing policy which works for tenants, and which helps make housing in Wales safer and fairer.

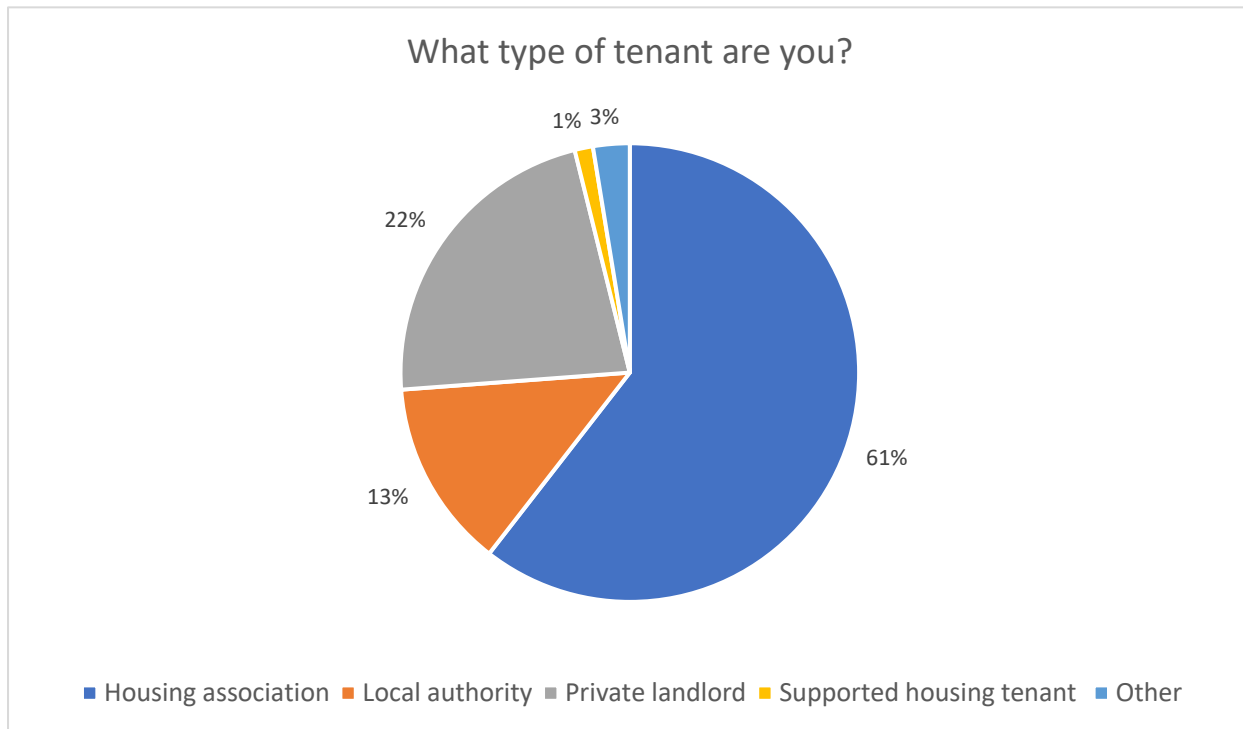
Tenant Voice sponsor



Tenant Pulse is part of programme of a work looking to amplifying the voice of tenants. We are very grateful for Pobl Group who sponsor this work.

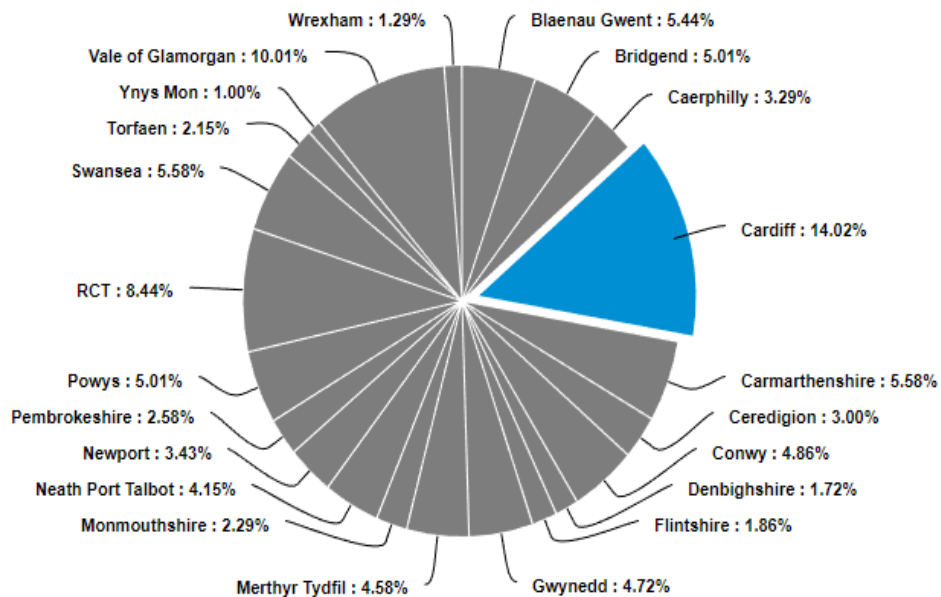
To meet one of our team to discuss the points raised, please contact: Hannah Richardson at hannah@tpas.cymru.

Appendix 1: Tenure

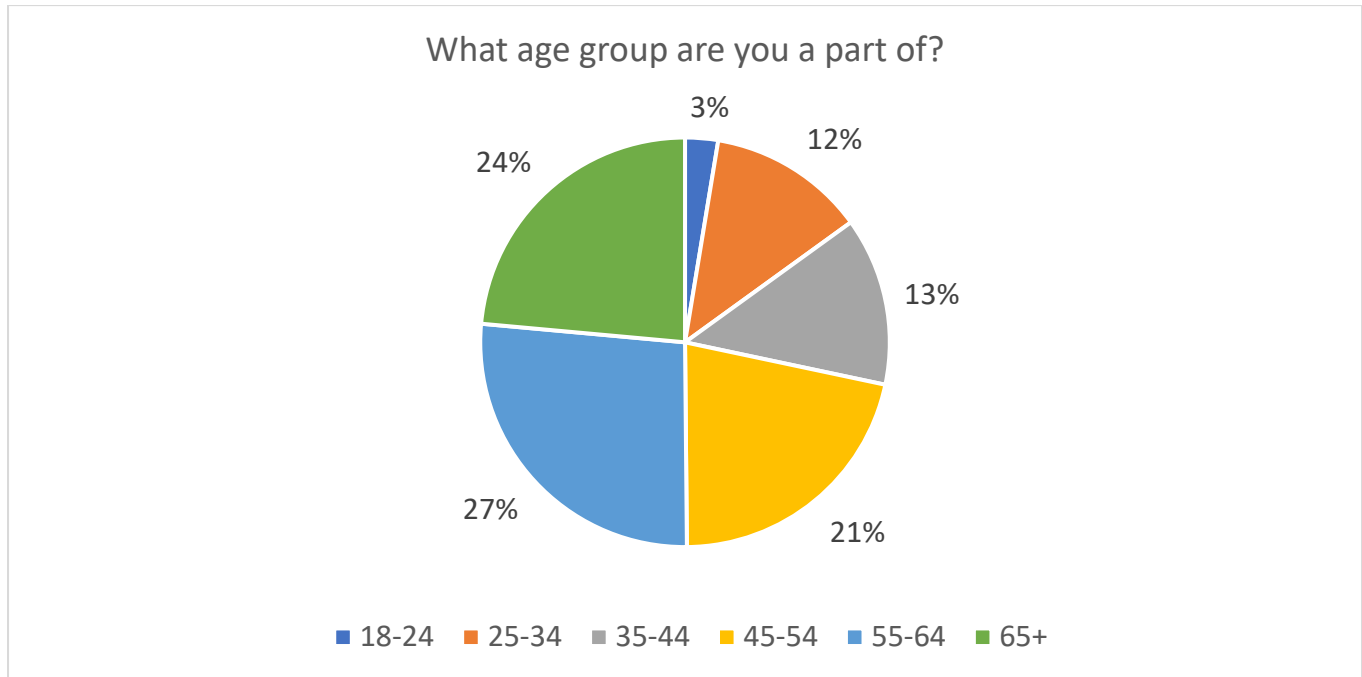


Appendix 2: Local Authority

Which county/local authority do you live in?



Appendix 3: Age



Appendix 6: Questions

What type of tenant are you?	Housing association Local authority Private landlord Supported housing tenant Other
Which local authority do you live in?	
What age group are you apart of?	18-24 25-34 35-44 45-54 55-64 65+
Do you consider yourself to come from a Black Asian Minority Ethnic background?	Yes No
How concerned are you about the following: Climate change	Not very concerned Not concerned Neutral Concerned Very concerned
Please rank (1-5) the following in order of most concerning to you to least concerning:	Reducing home energy bills Keeping rents low Tackling climate change Safer communities Access to local services

The above is an energy performance chart which shows how energy efficient a property is. Have you seen a chart like this before?	Yes No
Do you know what your home's energy efficiency rating is?	Yes No
Can you tell us what you think your EPC rating is? (A-G ranking)	Open comment box
Have you changed your behaviour around how you use energy in your home in the last year? Please choose all that apply	Reducing heating, whether that's the temperature it's set at or for how long the system is on Going to bed earlier Reducing electricity use Researching energy saving tips No, I've made no changes Other
Has your landlord communicated with you about Net Zero or works that may be done to make your home more energy efficient?	Yes No
How has your landlord communicated with you about Net Zero or works that may be done to your home?	Information leaflet By email Someone came to the door to tell me about it I attended a briefing event Received a letter about when work will start Other I have not received any communications about Net Zero or works from my landlord
Have you had any work done to improve the energy efficiency of your home in the last ten years? (Select all that apply)	Insulation Solar panels Energy storage battery Heat pump Other form of low carbon heating I'm in a new build with a number of low energy technologies No, I've not had any works done
If you've had Net Zero/energy efficiency works done to your home, would you be interested in participating in any of these tenant groups:	Tenants who've had work done to their home Tenants who have a strong interest in low carbon housing Tenants who want to feedback and give opinion on how to better communications with tenants around Net Zero No, I'm not interested in participating in these groups I have not had any Net Zero works done
If you've clicked 'Yes' to participating in a tenant group, please provide your name, email, and landlord:	
If you were going to have a new heating and hot water system installed	The installer Your landlord

in your home, who would you trust to provide the most useful information on how to use the system efficiently?	The manufacturer Third party experts (ex. Youtube, online guides, other installers) Tenant support forum with tips about system efficiency
Energy costs are directly linked to the energy efficiency of a property, which is measured by EPC. Theoretically, if your home is more energy efficient, you will pay less in energy costs. However, making homes energy efficient is a costly process. Would you be willing to pay higher rent costs for a more energy efficient home?	Yes, I'd pay higher rent costs if there was a guarantee that my energy savings would be more than the rent increase. Yes, I'd pay more to have a lower carbon and more sustainable home. No, I don't trust that the energy savings would be more than the rent increase. No, I don't think that tenants should have to pay more for low carbon homes. Other
In the last year, have you done any of the following:	Shopped at charity shops Cooked at home Bought local produce Walked, cycled, or got a lift instead of driving yourself somewhere Used recycle and reuse sites Changed shopping habits to reduce costs
Thank you for taking the time to fill out this survey. If you would like to enter the prize draw, receive a copy of the results of this survey, or enter our Tenant Pulse database to fill out TPAS Cymru future surveys, please click an option and comment your email.	Enter prize draw Receive a copy of the report once completed Enter our Tenant Pulse database to fill out future tenant related surveys
This is our first time using QuestionPro instead of DooPoll. Is there any feedback or comments that you can give on how your experience was using this survey platform?	Open comment box

Appendix 7:

Find your energy performance certificate (EPC): <https://www.gov.uk/find-energy-certificate>

Appendix 8: Example of paid advert used on Instagram to reach younger, private renters.

