

# ANNUAL ALL WALES TENANT VOICE: ISSUE 1



## THE BASICS MATTER

## FULL REPORT

October 2021  
[www.tpas.cymru](http://www.tpas.cymru)

## Foreword

Croeso to TPAS Cymru's first **Annual All Wales Tenant Survey on Tenant Perceptions**. This survey and report were designed to examine tenant views of their homes, their communities and the issues that matter most to them. We believe, as the tenant engagement organisation for Wales, that this report gives decision makers powerful insight into what really matters to tenants.

We received an excellent response rate, with almost 800 tenants from across Wales in a wide range of tenure, including tenants of Housing Associations, Local Authority Housing, Supported Housing, and tenants in the private rental sector.

This report should help focus tenant groups, housing staff & policy makers on improving services and help to focus on what really matters to tenants.

We know from our conversations with tenants that over the past 18 months that our homes and communities have never been so important to our health and wellbeing. Our previous Tenant Pulse reports during the pandemic highlighted many of the inequalities tenants living in both social and private housing are faced with and to find solutions, we need to understand what matters most to tenants at a national scale.

There is a desire across the housing sector to put tenant transparency, accountability, empowerment and listening at the top of the agenda, but the sector must act not just listen.

My takeaway of the findings are:

- 1) The sector must remain focused on the basics; repairs, damp, improvements to building fabric, affordable rent setting, value for money etc.
- 2) The pandemic lockdown has made people look at their home in a new light. People want better gardens, more space, and stronger action on anti-social behaviour.
- 3) Retrofit and other decarbonisation projects offer significant opportunities to address energy efficiency and fuel poverty, but we need to ensure we have the efficiency basics right (condition of windows, doors still feature highly), and mustn't exasperate issues like damp and mould, which still remain an issue for too many.
- 4) Tenants want better communications and to have their say in shaping services.

We hope you find this research insightful, and we hope the sector will embrace and consider the findings as an opportunity for positive change. TPAS Cymru look forward to working with tenants and landlords to implement the recommendations.

Finally, I would like to thank all of the tenants who took the time to respond to this survey and we welcome feedback on how we can improve this survey going forward. The aim is to run this annually to track tenant perceptions to help shape service improvement.

**David Wilton,**  
**Chief Executive, TPAS Cymru**



## Introduction

Tenant Pulse is the only National platform in Wales that enables tenants to provide anonymous accounts of their experiences, thoughts and feelings relating to their homes and communities. Every three months, we, as TPAS Cymru launch a Tenant Pulse survey based on a particular subject that is relevant to tenants at that time. With the shocking narrative we are seeing on the news around tenants' experiences and living conditions, we felt it the right time to launch our All-Wales Tenant Survey on Tenants perceptions. We want to provide everyone working in housing in Wales with the information around how tenants view their homes, their communities and the issues that are truly important to them.

The findings and recommendations within this research offer valuable insight into the challenges tenants are experiencing; what tenants enjoy about their homes and communities and how, as landlords you can make changes to ensure tenants are at the heart of your organisation by implementing their recommendations. The Covid-19 pandemic has impacted on maintenance, repairs and engagement and as a sector, we continue to face challenges, but we believe that listening to tenants, being open, honest, and transparent, tenants will live in homes and communities that they can not only survive in, but truly thrive.

## Research Methods

Under the TPAS Cymru's Tenant Pulse branding, an online survey was completed by tenants on the Doopoll platform during late July/early August 2021. Due to the restrictions relating to the current Covid-19 pandemic, no postal surveys were sent out. Tenants were asked a series of 14 questions (See appendix A).

### How the survey was promoted

- 1) Sent to 1300+ tenants signed up to Tenant Pulse. Like all long-term survey databases, some members have been on the mailing list for 4 years, so we are seeing a degradation in response rates. It's a challenge to remove non-responders effectively as responses are anonymous so we can't easily identify and remove. We are continually adding new members, so we believe the 'active' equilibrium is being held.
- 2) Promotion by social landlords and tenant groups to their tenants. This method creates some noticeable differences in tenant responses per landlord depending on the landlord's degree on engagement/promotion. Vale of Glamorgan Council had notable success in promoting to their tenants.
- 3) To target private renters, we used targeted paid advert tools for Facebook and Instagram. It proved very effective in reaching non-engaged tenants across a more diverse demographic than others promotional channels. We also received Private Rental Sector (PRS) survey promotion by the NUS Wales and Acorn Cardiff. Across the two platforms we reached 35,000 people. We noticed a significant improvement in spread of age with 32% of PRS responders via Instagram being under 34 years old.

### Data integrity

We reviewed the response data for any anomalies. No significant issues were found.

We did, however, notice one respondent stating they were a council tenant in Conwy and another saying they were a council tenant in Blaenau Gwent. Both are unlikely, as these counties carried out a wholesale stock transfer, however we considered that these Councils may have some

specialist accommodation, or that the tenant still believes that they rent from the Council. We can't clarify with the tenant as the survey is confidential.

We also found 1 out of the circa 800 responses were unacceptable due to racist overtures. We have not included their comments.

Members from across Wales were asked a range of questions relating to their current rental experiences, thoughts, and feelings. Respondents were able to choose from multiple options and able to leave comments.

### **Response summary**

A total of seven hundred and eighty-six tenants from every Housing Association and stock retaining Local Authority in Wales responded to this survey and we are confident that the findings offer valuable insight.

We have separated each question to identify social housing tenants and private housing tenants, recognising any differences and similarities.

The breakdown of the responders was as follows:

Local Authority Tenants	150
Housing Association Tenants	366
Private Sector Tenants	270

The breakdown of age in Private Housing was as follows:

18-30	14%
30-45	28%
45- 60	33%
Over 60	23%
Prefer not to say	2%

The breakdown of age in Social Housing was as follows:

18-30	3%
30-45	20%
45- 60	32%
Over 60	45%
Prefer not to say	0%

As can be seen, there is a significant difference in age demographics from responders in social housing, compared to private tenants.

### **Black Asian Minority Ethnic (BAME) background**

3% of tenants in private housing identified as having a Black Asian Minority Ethnic (BAME) background.

3% of tenants in social housing identified as having a Black Asian Minority Ethnic (BAME) background.

According to StatsWales, the Welsh population is made up of 5.6% people who identify with BAME associated ethnicities therefore TPAS Cymru recognises that it has further work to do going forward to ensure BAME voices are reached and heard.

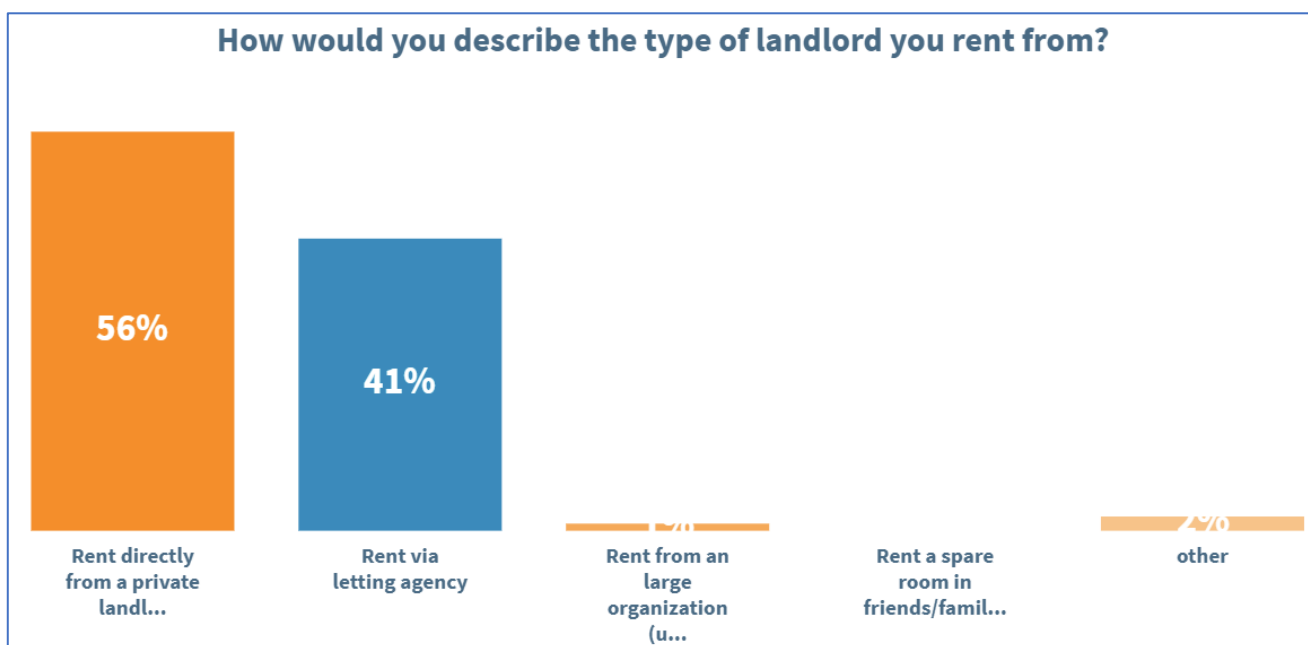
As with previous Tenant Pulse surveys, the highest proportion of responses were from tenants living in housing associations (366). 150 were from Local Authorities and 270 from the private sector, our highest response rate to date.

Highest responding areas in Private Housing	Highest responding areas in Social Housing
1. Cardiff	1. Vale of Glamorgan
2. Conwy	2. Rhondda Cynon Taf
3. Carmarthenshire	3. Conwy

Looking at the social and private sectors combined, the lowest responding areas were: Ynys Môn, Merthyr Tydfil, and Neath Port Talbot

### PRS Tenant relationship are they renting direct from landlord or letting agent

We were pleased with the split we achieved for direct relationship v's letting agent



#### Going forward

This is the first of what we hope will be an annual All Wales tenant benchmark. TPAS Cymru want to build on this first report and ensure stronger and more diverse voices are heard. We hope it will serve as a basis to shape services, housing policy and decision making going forward.

## Key Findings

### About this survey

- This survey was the largest response rate to date for Tenant Pulse. We had a wide demographic range of tenants which was inclusive of younger PRS tenants.
- A significant percentage of social housing tenants who took part are not currently engaged in established tenant participation channels. These voices are important to be heard to give a wider more diverse perspective.
- The majority of tenants in both Private and Social housing intend on staying in their homes long term but that doesn't mean to say they like their position or satisfied with their home.

### More to be done

- Across the survey, tenants fed back their concerns that the basics are not being done – repairs, planned maintenance, and tackling ASB. Whilst Covid will have hindered some of work by landlords, there is still considerable dissatisfaction.
- Perceived lack of tackling ASB is still a key concern of tenants within social housing, impacting on Health and Wellbeing.
- A key concern of tenants in private housing is around insecurity of tenure and feeling stuck in private renting.
- The highest level of dissatisfaction amongst social tenants and private tenants is around energy efficiency and damp and mould
- Alongside tenant comments around repairs, ASB and mould; tenants felt strongly about the importance of downstairs toilets and better gardens.
- Tenants desire flexibility for different types of home to accommodate changing needs – this survey highlights the frustrations of those wanting to downsize and those needing more space
- There is still a long way to go before tenants feel that landlords have got the basics right. i.e. well maintained, good community etc. Nearly 4 out of 5 people believe their home is not energy efficient and over 60% believe their home has damp and mould.

*"Getting repairs right and improving existing homes before building new ones"*

### Affordability

- Almost half of tenants in both private and social housing believe their homes are unaffordable.
- Social Housing Tenants rely heavily on Universal Credit and will be amongst the hardest hit by £20 weekly decrease. Whereas private housing tenants rely more heavily on earned income, particularly amongst the younger demographic.
- Affordability satisfaction is higher in tourism heavy rural areas in social housing, whereas private housing renters in tourism heavy rural areas are least satisfied with the affordability, indicating social housing has a far more important role in the current crisis with second homes and tourism accommodation.

- Tenants' ability to pay their rent and bills does not mean that it is affordable.
- There were two tenant groups within the PRS who have been most impacted by covid related issues (furlough, reduced hours, limited work etc) and have consequently struggled to pay their rent (26%). Those aged 18-30 and tenants from BAME backgrounds. These were higher than any other age group in both social and private housing.

### **Tenant engagement**

- There are lower levels of tenant engagement and participation amongst tenants who identify as BAME. This highlights the challenge the sector has, to tackle to improve communication and engagement with ethnically diverse communities.
- Younger age groups within social housing are not participating and having their voices heard when comparing them to over 60s.
- Within the PRS, it is a more transactional relationship with their landlord and lower levels of expected engagement.
- In social housing, the over 60s are more concerned about hearing about maintenance plans than younger people (75% to 58%). It appears the opposite is true within the PRS, with under the 30s being more interested than those over the age of 60.
- Tenants within both tenures want to be informed about plans and decisions that impact their home. Specifically, maintenance and rent setting.
- There are significant differences between expectations of landlord communication from the PRS and social housing tenants. Whilst both tenures want to know about things that directly impact them, such as repairs, maintenance and rent setting. Outside of that PRS tenants do not want to hear from their landlords about anything. However, almost half of social housing tenants want to hear about information in their community.

### **Tenant Satisfaction**

- Tenants' perceptions of their local community did not hold any surprises. Environmental factors such as the need for more amenities for litter and environmental planning, alongside ASB, continue to be key.
- Two thirds of social housing tenants are proud to live in social housing compared to less than half of private tenants who feel proud to live in the private sector.
- Over half (58%) of tenants in the private sector aged 30-45 had received negative comments for living in private housing due to judgement of their peers for not yet owning a home at that age. This is not the case for the majority of social housing tenants, however, over half of the BAME community 53% within social housing had received negative comments about where they lived.
- Private housing tenants who have a direct relationship with their landlord are more likely to recommend them than those who are renting through an estate agent. This highlights the importance of the tenant landlord relationship and whilst PRS tenants would prefer less communication with their landlord, the relationship itself is clearly important.
- Ensuring security of tenure is crucial as these concerns are still looming over PRS tenants. The recent reform and changes to the minimum notice period should help to improve confidence amongst tenants.

## **Recommendations:**

- WHQS2 needs to ensure that standards are not just maintained but improved. Tenants are suggesting the sector doesn't always get the basics right.
- Tenants need to be aware of the options available for how to move to accommodation that better suits their needs.
- Further research is needed to understand why younger people are less satisfied with their homes when comparing with older generations.
- Welsh Government and landlords across sectors must invest in existing homes to bring energy efficient ratings up to the new standards to benefit the tenant financially and provide a warmer home. Better engagement and communication on decarbonisation plans will improve satisfaction levels.
- Welsh Government should abolish no fault evictions Section 21 (Section 173 Renting Homes) to provide better security of tenure for private renters.
- Landlords should review their tenant participation strategies to ensure that services are being monitored by tenants to identify and track service improvement.

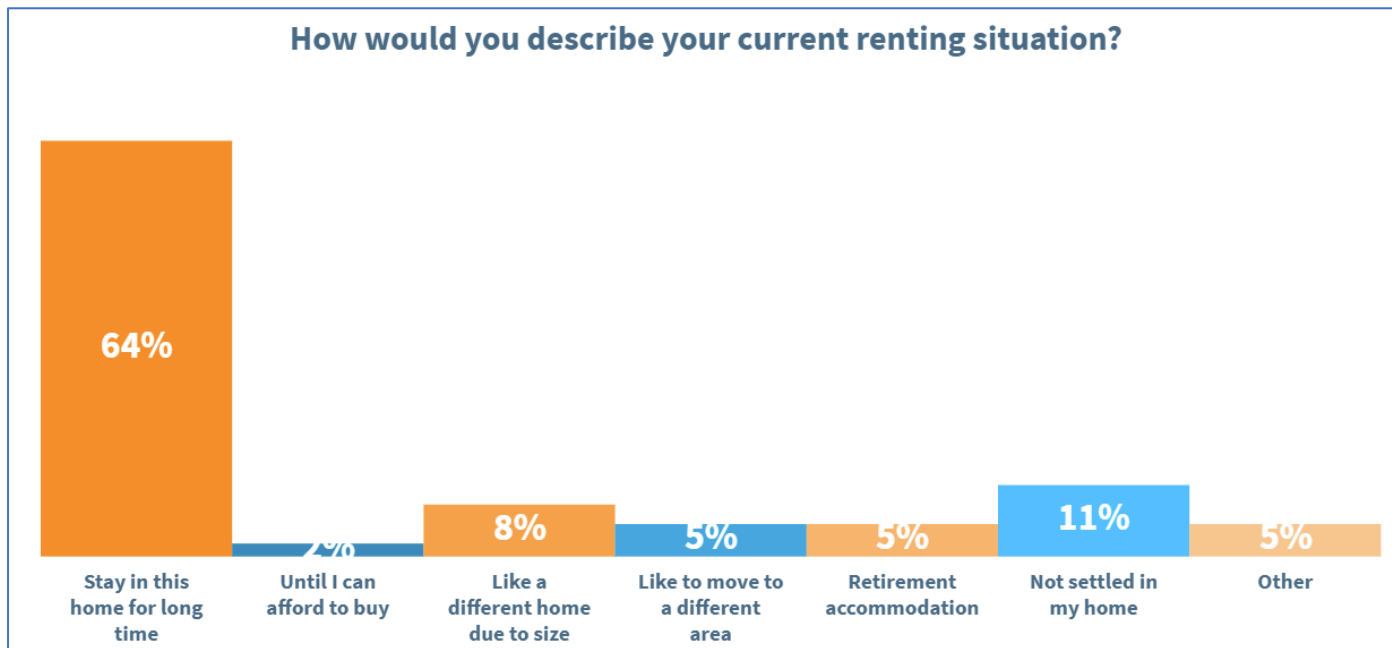


## Detailed analysis of the findings

### Tenants' perceptions of their current renting situation?

The aim of this question was to examine tenants' initial thoughts and perceptions of being a tenant/renter. Tenants were able to choose one answer to this question, as well as provide any comments to support their views

#### Looking at social housing tenants first:



1. The most common answer is that tenants plan to stay in their existing home for long time, particularly when combined with the category of retirement accommodation.
2. Low levels of 'just short term until I can afford to buy'. Looking at tenant comments, we noted that buying a home is seen as neither financially realistic or desirable due to the adaptations and support services that social housing offers.
3. Nearly a quarter would however like a different home within social housing due to unsuitability re. size, location, and other factors like maintenance

The key themes within the comments section of this question were:

#### 1) ASB issues

*"Very happy but just wish [Gwent Valley RSL] would get rid of two drug dealing tenants then it would be perfect living here."  
(RSL RETIREMENT ACCOMMODATION)*

*"Awful.... neighbours from hell and the landlord isn't doing anything about it.. daily abuse"*

*"Neighbours harassing me and my daughter, housing officer very unprofessional and taken sides with neighbour's vile accusations, housing officer only dealing with neighbour's complaints and no complaints that I have made"*

*"Stuck between a narcissist and a narcissistic personality disorder. Both have xenophobia"*

*"I have been an excellent [Swansea based RSL] tenant for 17 years. Two years ago, they put in a man next door to me who made my life an absolute misery causing me to almost have a breakdown. I hope I get out of here one day as [RSL] do not support good tenants"*

*"I live in a close, with a lovely bunch of neighbours who are also my friends. We have looked out for each other and supported each other through the lockdowns, and will continue to do so going forward. Unfortunately, there is one household where ASB is quite a problem"*

*"Waiting on transfer. In the two years I have been at my property, I have been subject to anti-social behaviour, that has resulted in me wanting to get out. My health has deteriorated because of it. Dealing with the issues were poor, and on top of that, my home stinks of cannabis use every day. Two years of breathing neighbours' habits in."*

## 2) Size or location

**Note 1:** There are 2 interrelated themes 1) those wanting to downsize due to age/disabilities and 2) younger families needing more space.

**Note 2:** Desire to downsize to a bungalow featured very strongly in 'expansion answers' for social housing tenants which relates to age demographic.

*"I am in desperate need of a bespoke, disabled adapted bungalow that will fit my needs"*

*"I live in a large four-bedroom house would like a two-bedroom bungalow as there is only my husband and myself at home as all our children have left home"*

*"I have disabilities and the home is not suitable as I am struggling with the stairs and toilet being upstairs and would be happy in a bungalow but do not want to be housed in a flat as had an awful experience"*

*"Am hoping to be offered a suitable bungalow with small garden and benefit of walk-in shower. My present flat has no garden for my use and I cannot get a walk-in shower fitted. These things are for the benefit of improving my health and mobility, as I have arthritis"*

*"I am currently living in a 3-bed house but due to my age (71) I would like a 2-bed bungalow".*

*"I need a bungalow due to physical difficulties. I have been bidding on Homes 4 U for over a year"*

## 3) Tenants who need more space or less space

*"I am on rehousing waiting list for nearly 10 years, I and my two daughters (10 years old and 7 years), we live in one bedroom flat, the flat is so small. We have a lot of medical issues.*

*"I live in 3 Bedroom house and only I live in it since my mother passed away, and I'm looking for a one-bedroom flat."*

## 4) Saving for a deposit to buy

Finding: across all the comments on desire to buy, saving for a deposit seems to be the biggest barrier.

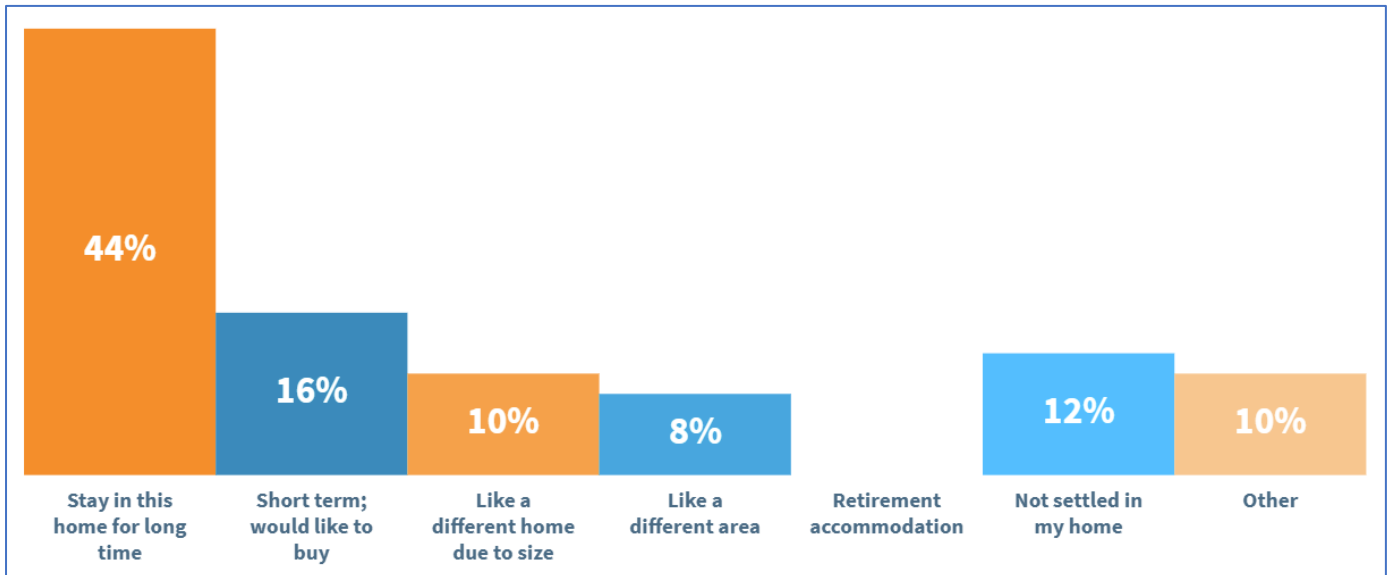
*"I can't afford to buy as I can't save deposit"*

*"We don't have a deposit to purchase a house as yet"*

When looking at differences between Housing Associations and Local Authority tenants, the noticeable difference was:

- 1) tenants from LAs had a stronger desire to move to a different size property (with a significant focus on bungalows).
- 2) 2% of tenants from HAs properties also wanted to buy a home where no noticeable data was recorded for LA tenants on this theme

**Private Housing Tenants: *How would you describe your current renting situation?***



Within private tenant findings:

- Less than half (44%) of tenants intended on staying in their home for a long period of time
- 16% of tenants intended on renting short term until they could afford to buy. This was significantly different to the findings in social housing (with only 2% of tenants wanted to buy a home).
- Almost a quarter of tenants did not feel settled in their home and 10% stated 'other' which has been elaborated on in the comments

There were two key PRS themes:

**1. Insecurity of tenure**

*"We are being evicted. Landlord is selling our home and we need to find alternative housing"*

*"After renting for 13 yrs the landlord has decided to sell"*

*"We have been given our notice to move out as the landlord would like to move back into the property"*

*"Need to buy as the house will be sold soon"*

*"I rented with aim of being as long term. Landlord has served notice as he wants to sell. I've not been in the property a year. Have two young children."*

*"I've been served notice to quit as landlord is selling house"*

*"Constant fear of lease not being renewed"*

*"The uncertainty of living private renting is she going to sell what do we do then"*

*"My current landlord has passed away i am in limbo as what is going to happen to the house"*

## 2. Feeling stuck in private housing

**Key point to note:** When looking in more depth at comments of those who had said they wanted to 'stay in this home for a long time', it seemed that it wasn't necessarily through choice.

*"House is extremely mouldy and other problems but rent is reasonable and I can't afford for landlord to raise the rent"*

*"We were promised we could rent the property for as long as we needed, our landlord has just upped the rent by £150 per month. And there's a lot of repairs that need to be done, this forcing us to move out"*

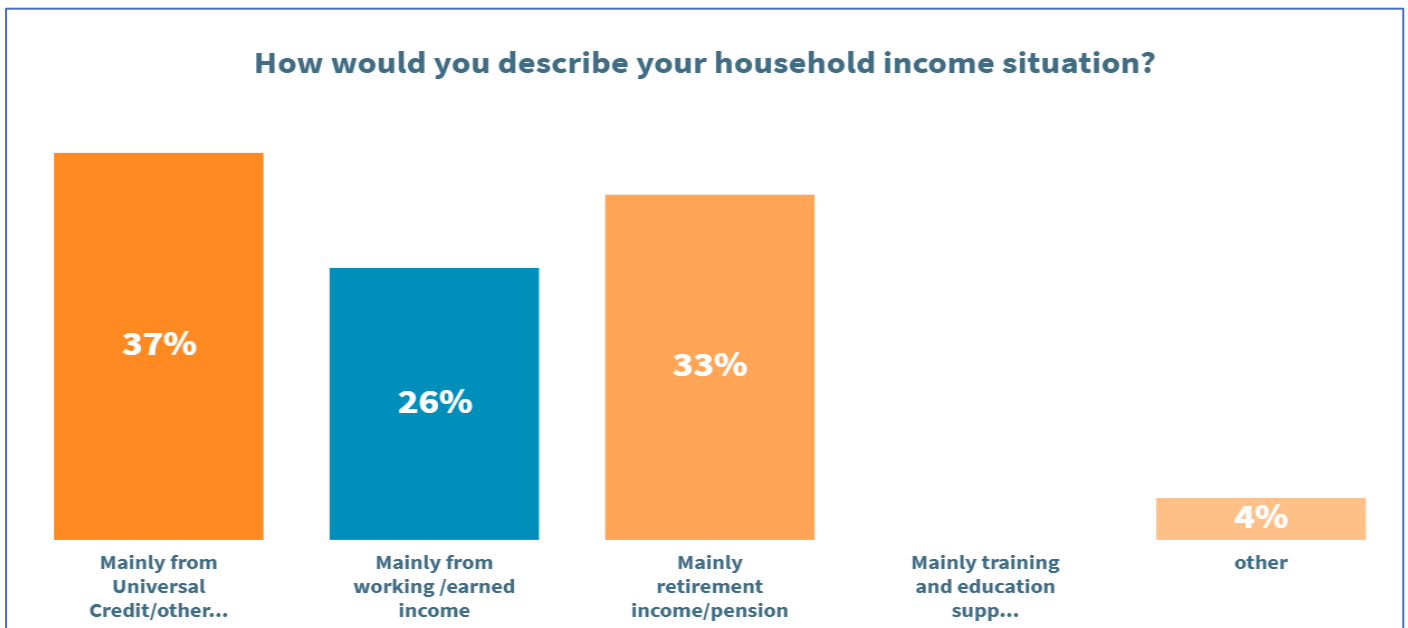
*"Although settled, I don't feel secure. Landlord has previously given notice when repairs requested"*

### Tenants Household Income

Tenants were able to choose one answer to this question with no open comment box.

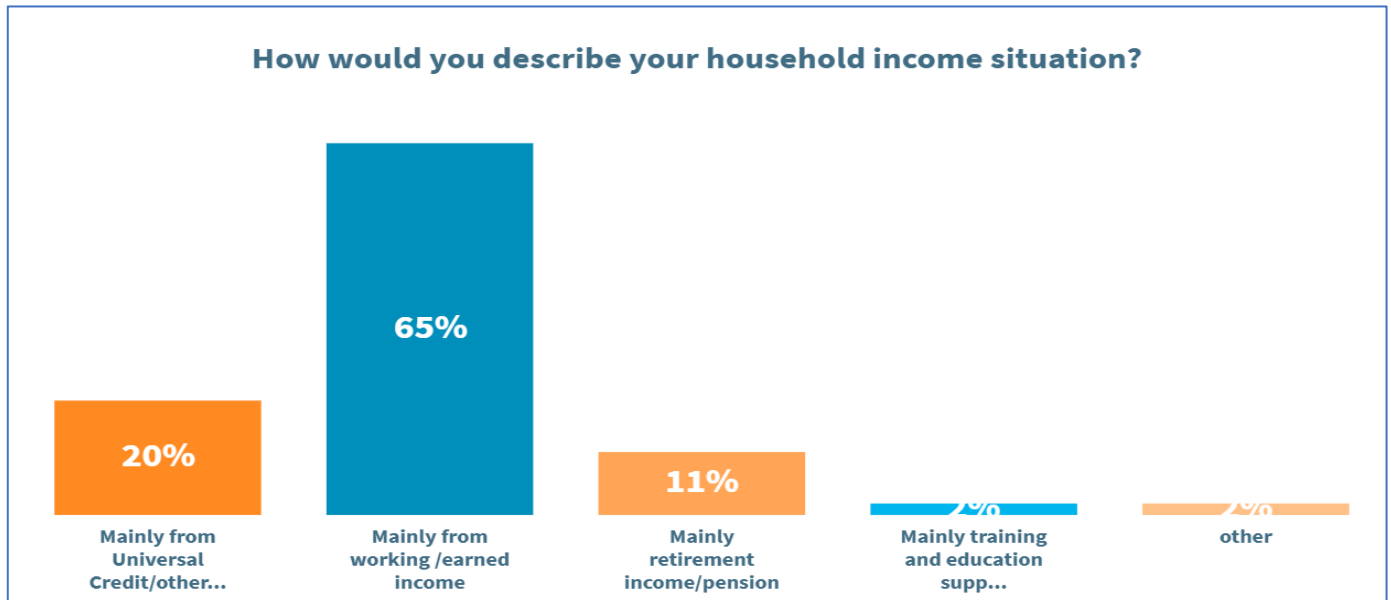
#### Social Housing Tenants

The main source of income for social housing tenants was Universal Credit (37%) and retirement income (33%) which relates directly to the highest age range of social housing tenants completing this survey. Over a quarter of tenants (26%) rely on earned income as their main source. That is not to say that only 26% of tenants are working, simply that only 26% earn enough to rely on UC as a top up rather than their main income.



#### Private Housing Tenants

There was a significant difference in PRS v's Social housing re. income source. The main source of income for private tenants was earned income (65%). This is partly due to the age demographic amongst those who responded to this particular survey (younger), only 11% of tenants relied on retirement income and 20% on Universal credit. We also considered that there are still some barriers of entry for PRS renters who receive Universal Credit.



When comparing how income is generated in households in social housing with those in the private sector, we can see that there are higher levels of tenants relying on retirement income and welfare income in social housing compared to those in private.

When considering age differentiation, we can see that those aged between 18-30 were the most reliant on income generated through working (59%), closely followed by those aged 30- 45 (46%), with 49% of this group reliant on benefit income. 53% of those aged 45-60 had their main income from welfare and as can be expected, those aged 60+ were mostly reliant on retirement income (69%).

Within the private sector, those who described their main income as coming from benefits were predominantly those aged 60+ (25%), closely followed by those aged 30- 45 (22%). The consistencies across both social and private housing are that those aged 18- 30 are the age group reliant on earned income. Social (59%) and Private (76%). That being said, it must be noted that those aged 18-30 were amongst our lowest respondents particularly in social housing. Overall, the level of tenants who describe their household income as coming mainly from welfare benefits is significantly higher in the social sector and highlights the demonstrable need to maintain the £20 uplift to Universal Credit.

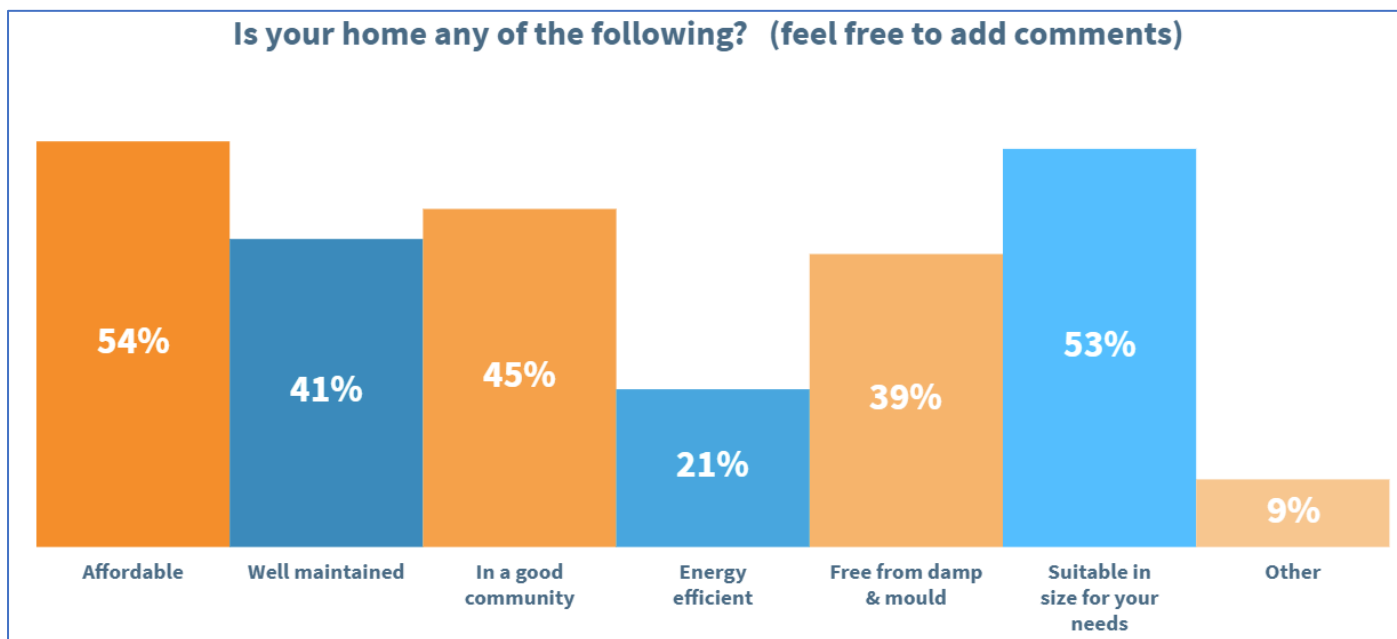
In terms of respondents who identified as BAME ethnicity, there were no significant differences in terms of household income situation.

We didn't attract any significant responses from students (whose main income was via student loans/grants). We have traditionally focused our marketing & communications on longer-term renters rather than the annual transient student rental market or those living at home. We have undertaken specific surveys for this market in the past and plan to work with partners in the future to understand the needs of this sector going forward.

When looking at the differences based on tenants living in Housing Associations or Local Authorities, 35% claimed UC, 27% worked, 34% retired, compared to 44% claiming UC in local authority housing, 19% working and 33% retired.

## Tenants Views on their own home

The purpose of this question was to understand how tenants viewed their home against a list of topical housing policy themes. Tenants were able to choose multiple answers to this question, as well as provide any comments to support their views.



The most common response was agreeing that their home was affordable (54%) and suitable in size based on their needs (53%). That left nearly half of the respondents disagreeing.

Just under half the tenants felt that they lived in a good community (45%) and that it is well maintained (41%). One of the lowest positive responses was they considered their home to be energy efficient (21%). Less than half of the tenants also reported that their home was free from damp and mould (39%) indicating that 61% did not consider their home free from damp or mould.

Due to the substantial data each local authority area holds within this question, we have broken it down into the three highest and lowest ranking areas based on the subjective views from tenants.

*Note: this is purely geographically based and not about stock holding local authorities*

### Highest ranking local authority areas

Affordable	Well maintained	In a good community	Energy efficient	Free from damp and Mould	Suitable size
Ceredigion 80%	Pembrokeshire 71%	Gwynedd 66%	Gwynedd 44%	Merthyr Tydfil 60%	Merthyr Tydfil 73%
Bridgend 77%	Monmouthshire 57%	Pembrokeshire 64%	Wrexham 38%	Caerphilly 53%	Flintshire 72%
Gwynedd 77%	Gwynedd / Conwy 55%	Conwy 62%	Pembrokeshire 28%	Carmarthenshire 52%	Vale of Glamorgan 58%

In terms of the level of maintenance of homes, Pembrokeshire was significantly higher than any of the other local authorities at 71%.

## Lowest ranking local authority areas

Affordable	Well maintained	In a good community	Energy efficient	Free from damp and Mould	Suitable size
Powys 36%	Flintshire 27%	Carmarthenshire 29%	Pembrokeshire 7%	Blaenau Gwent 20%	Denbighshire 30%
Monmouthshire 35%	Blaenau Gwent 29%	Blaenau Gwent 33%	Monmouthshire 7%	Denbighshire 20%	Bridgend 33%
Blaenau Gwent 41%	Ceredigion 33%	Newport 37%	Flintshire 9%	Gwynedd/ Newport 20%	Caerphilly 46%

When exploring tenants' comments who responded 'other' to the survey, there were two key themes embedded in the comments:

### Inadequate space

*"I have high humidity in the flat due to lack of ventilation as I have only 2 windows in the property"*

*"This refuge is too small as I am sharing a room with my 13yr old daughter which is not right in my eyes, she's needs privacy as do I"*

*"Rooms are small when needing mobility aids"*

*"It's an older property and upgrades to the kitchen have literally boarded up two floor to ceiling storage cupboards in the small kitchen and tiled over. Storage space is a huge issue".*

### Inadequate insulation

*"Windows are draughty and the new door I got gaps as they said frame is not square"*

*"It's costly to heat, my bedroom is black with condensation"*

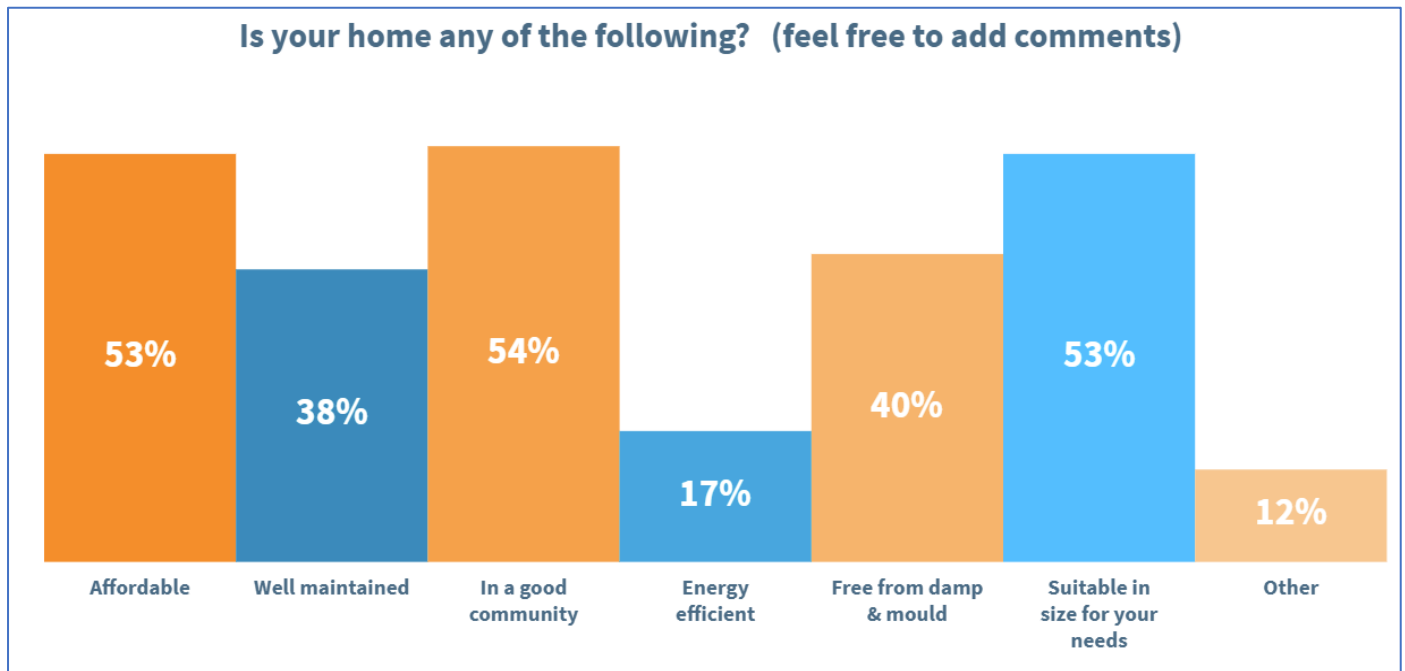
*"When our bungalows were upgraded i.e., new kitchen bathroom we were supposed to have insulation on the outside of the bungalow like the rest of the council estate behind us over 3yrs have past and we are still waiting for it to be done the bungalows in the winter are like ice boxes we are all old age pensioners living here disgusting"*

### Topical observation: affordability

Some of the highest rated areas for affordability in social housing were in rural areas facing the current challenge with second homes and tourism accommodation. (Gwynedd, Ceredigion, Ynys Môn etc) Conversely some of the lowest level of affordability satisfaction in private renting were in same rural/tourist areas.

A more detailed study is needed but would initially indicate the value of social housing in providing affordable rents in areas highly impacted by second homes and holiday lets.

## Private Housing Tenants views on their home



PRS Tenants were able to choose multiple answers to this question, and like social housing the most common description of their homes being in a good community (54%), affordable (53%) and suitable in size for their needs (53%). Like social housing, energy efficiency was a low-ranking area.

### Affordable does not mean satisfactory

*"Current rent below average for the area but house not well maintained"*

*"We are very fortunate to be in a home that is affordable, we cannot afford to move out. However, we also need significant maintenance that has not been addressed"*

*"I ticked 'affordable' because we pay slightly less than a typical rent for the property. It hasn't been decorated for the 12 years we've been here, apart from small internal jobs we've done for ourselves."*

### Levels of mould and damp

*"My home is damp all way through"*

*"We have a continuous fight with damp and mould spores around the house. Floorboards leading to bathroom have a foothole and still waiting for it to be fixed"*

*"It's a s\*\*t hole (pardon). Full of mould and rats"*

### Not all negative

*"Great location, affordable"*

*"I have been very lucky in finding a flat as nice as mine in the area it's in for the price I pay"*

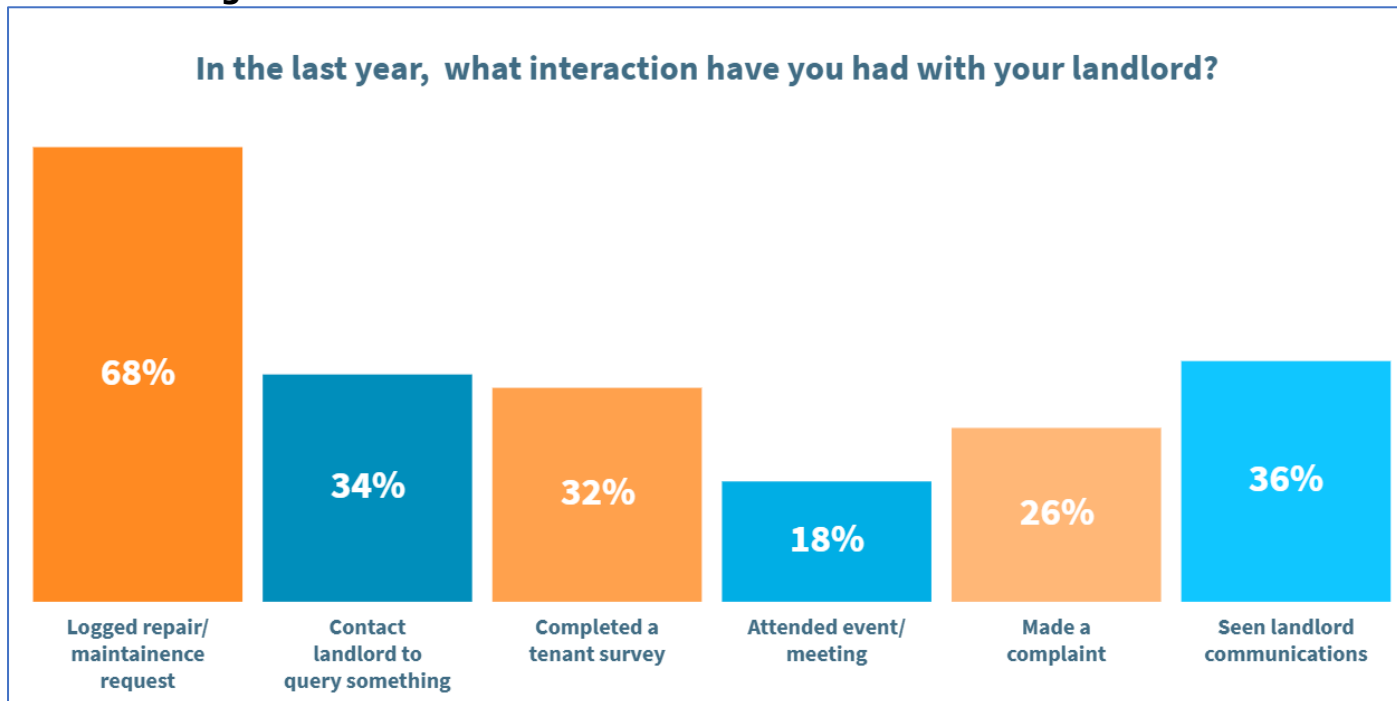
*"My home is beautiful and maintained as it should be"*



## Tenant & Landlord Interaction & Communications

The purpose of the question was to explore the tenant landlord relationship regarding communications and engagement. Tenants were able to choose one answer to this question and were not provided with an open comment box.

### Social Housing Tenants



The most common form of interaction by tenants with landlords is when logging a repair or maintenance request (68%). The lowest level of interaction is from those who attended an event/meeting.

When comparing housing association tenants to local authority tenants, the data suggested that tenants living in housing associations are more active in contacting their landlords, attending events and landlord communication.

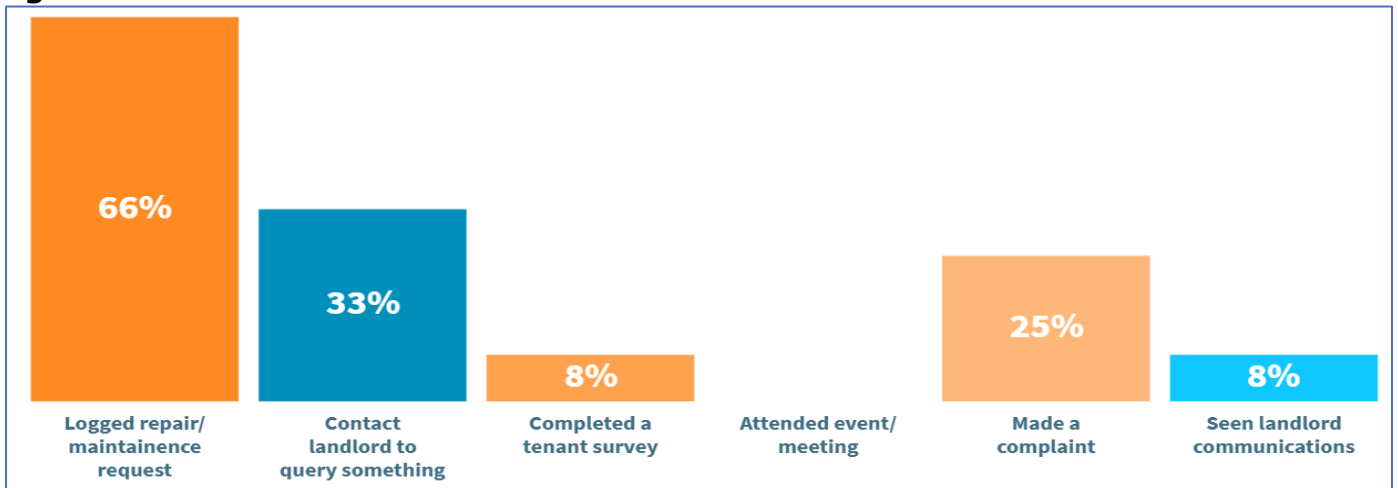
The responses from tenants who identified as BAME reported higher levels of requests for maintenance and repairs by +7%, taking this category to an overall percentage of 75% needing repairs. Interestingly, only 7% of BAME tenants had completed a tenant survey for their landlord compared with 32% of the general tenant population. Also, only a quarter of those identifying as BAME reported that they had seen landlord communications compared with over a third of the general tenant population. This highlights the challenge the sector has to improve communication and engagement with ethnically diverse communities.

When we looked at age differentiation, it was clear that this played a significant part in engagement. Whilst logging repairs and taking up queries is the same across all ages, when it we look at tenant engagement there are significant differences – younger people were less likely to complete satisfaction surveys, attend events and see landlord communications.

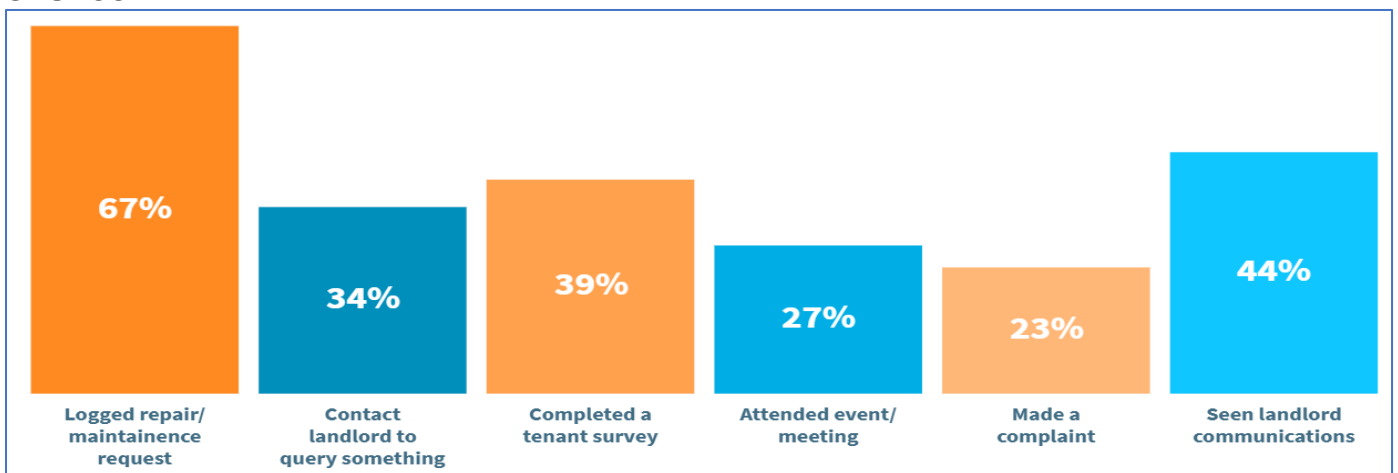
This is an ongoing challenge for the sector and as can be seen in the charts, there are two extremes.

## In the last year, what interaction have you had with your landlord?

### Age 18- 30



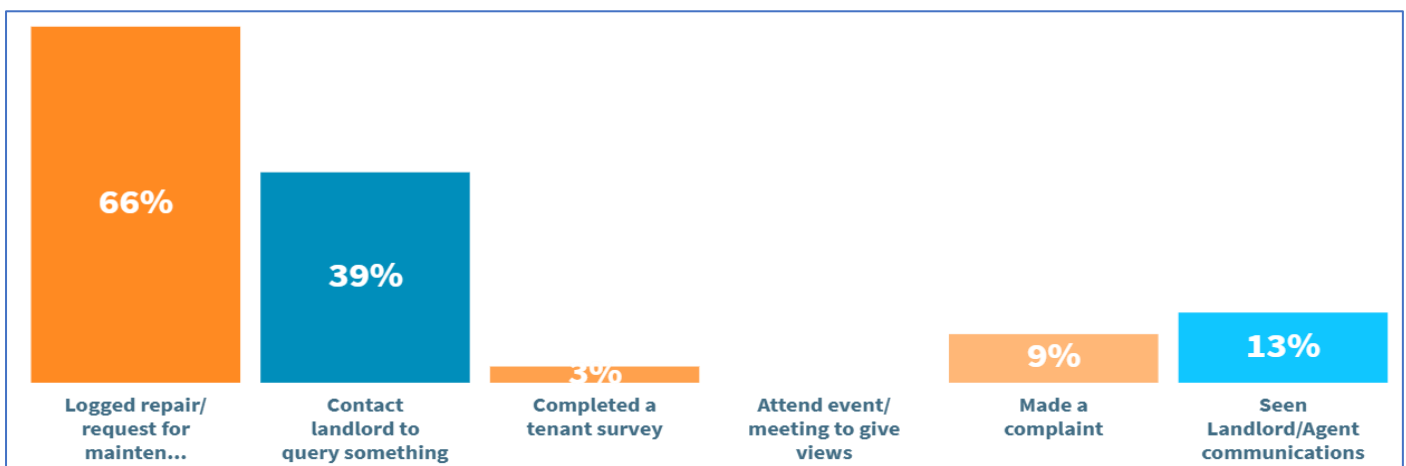
### Over 60



## Private Housing Tenants views on Tenant/Landlord interaction

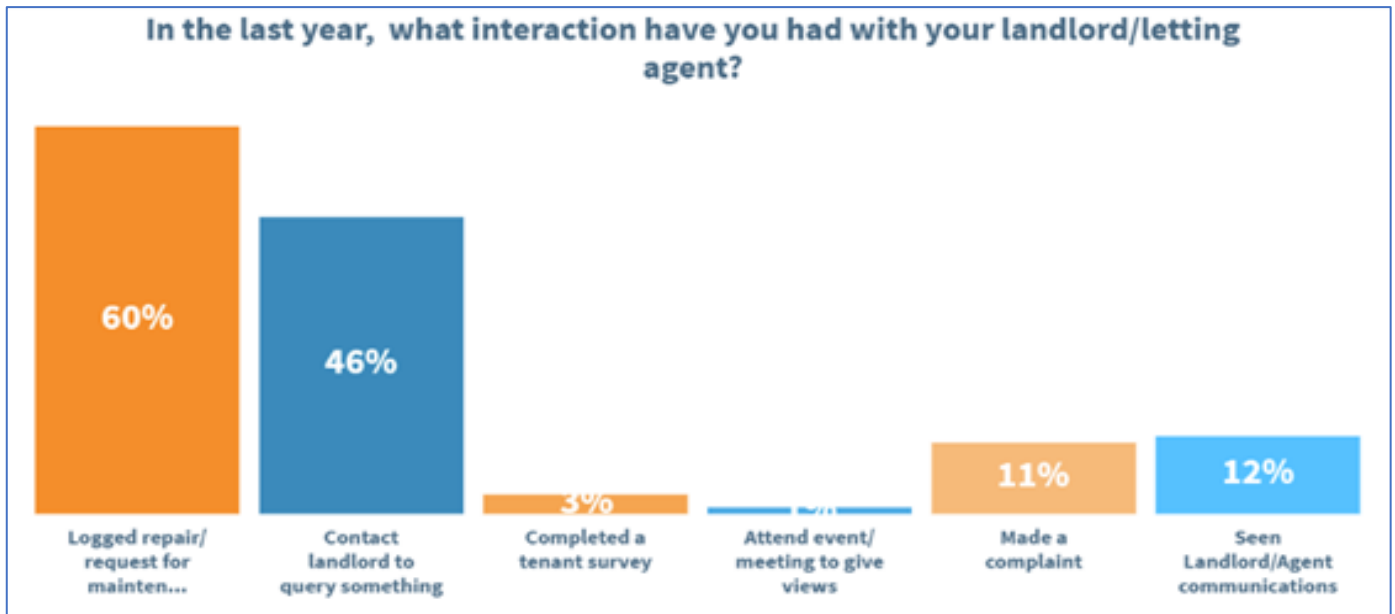
(Note: in the PRS survey we also gave options re. Letting Agent and were able to filter on those PRS tenants who let via an agent)

PRS tenants logging repairs/ maintenance requests are similar levels to those in social housing. However, there are much lower levels of tenant engagement and communications, and a more transactional relationship which is consistent with previous research PRS findings.

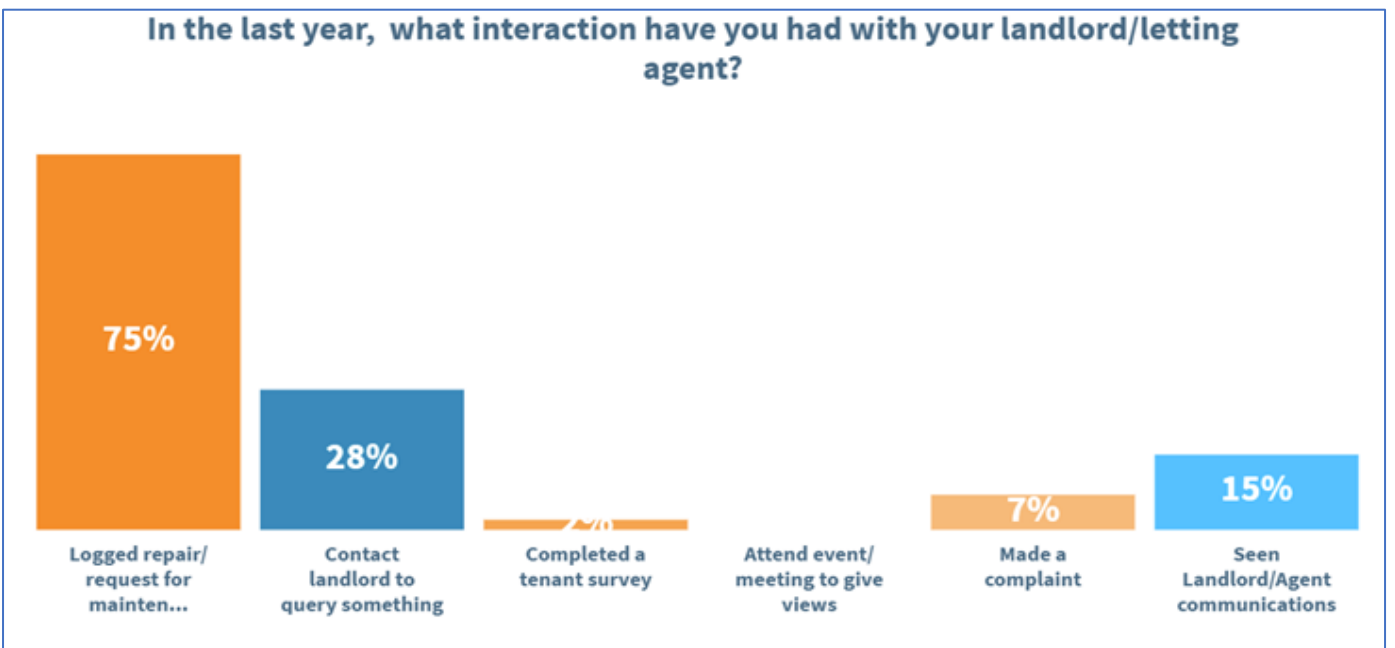


Question: Was there any difference in communications/engagement for Private landlord v's Letting Agent? = There wasn't much we could deduce from these findings

**Landlord direct:**



**Letting agent:**



## Affordability of Housing

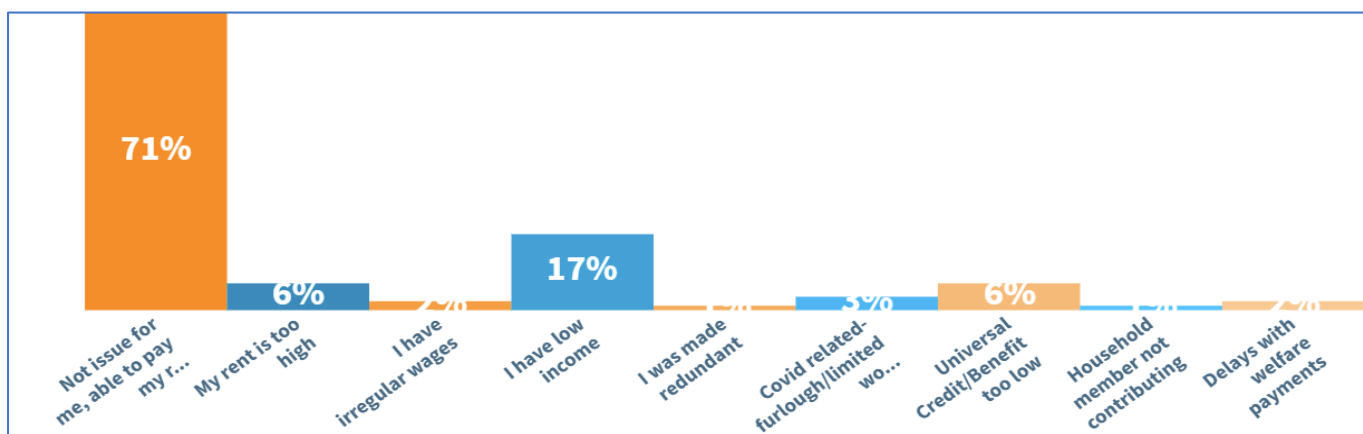
Tenants were able to choose multiple answers to this question and were not provided with an open comment box.

### Social Housing Tenants

The largest proportion of tenants in both the private sector and social sector felt that paying their bills wasn't an issue and they were able to pay both their rent and bills. However, we must not conclude that ability to pay is same as being affordable. In other questions affordability scores much lower.

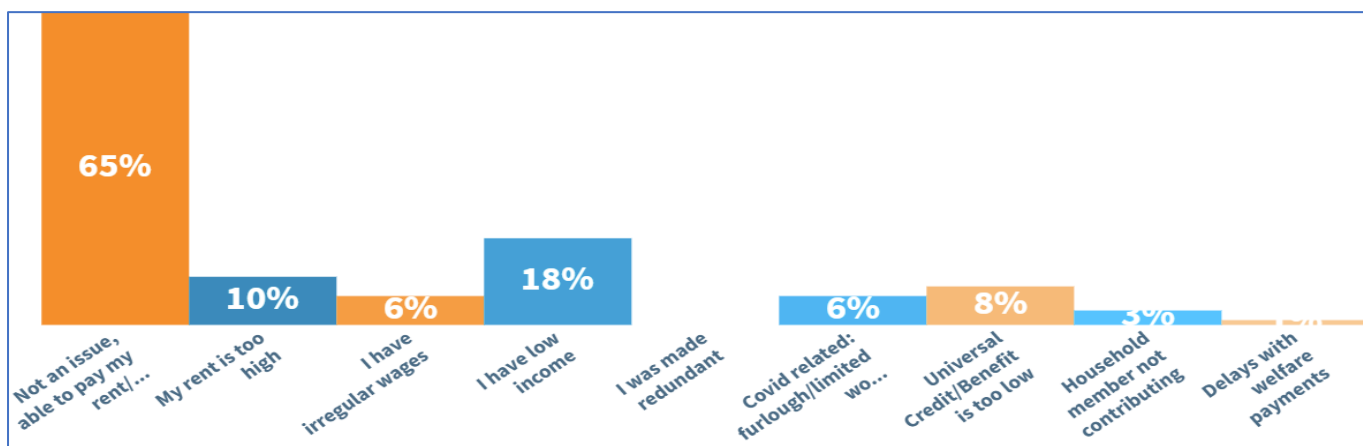
However, when looking at social tenants v's PRS, there is a +6% variation from those living in the social housing. As can be seen in the charts, +4% more tenants in private housing felt that their rent was too high (10%) when compared with social of 6%. The most significant attributing factor to social and private tenants struggling to pay their rent and bills was having a low income. According to the Joseph Rowntree Foundation, Wales has lower pay for people in all sectors compared with the rest of the UK which is consistent with our findings.

### If you are struggling to pay rent/bills, what is causing this?



### Private Housing Tenants

In the private sector, those most impacted by low income were those aged 18-30 (20%) and aged 60+ (24%). In comparison, those most effected in the social housing were aged 30-45 (21%) and 45-60 (23%).



When we segment PRS responders, two groups within the PRS renter population stand out as most negatively impacted by the Covid pandemic (i.e., furlough, reduced hours, limited work etc). These two groups are **under 30s renters** and **BAME renters** – both recorded levels of 28-30% compared to 5% for wider PRS population.

This was considerably higher than any other age group/ethnicity in both social and private housing and reflects other reports as to lack of job security and increasing unstable 'gig economy', that younger and BAME people face. This reinforces other studies and policy focus by Welsh Government.

**Note 1**

This survey was taken before the end of the Government furlough scheme. We expect further affordability challenges when it does end.

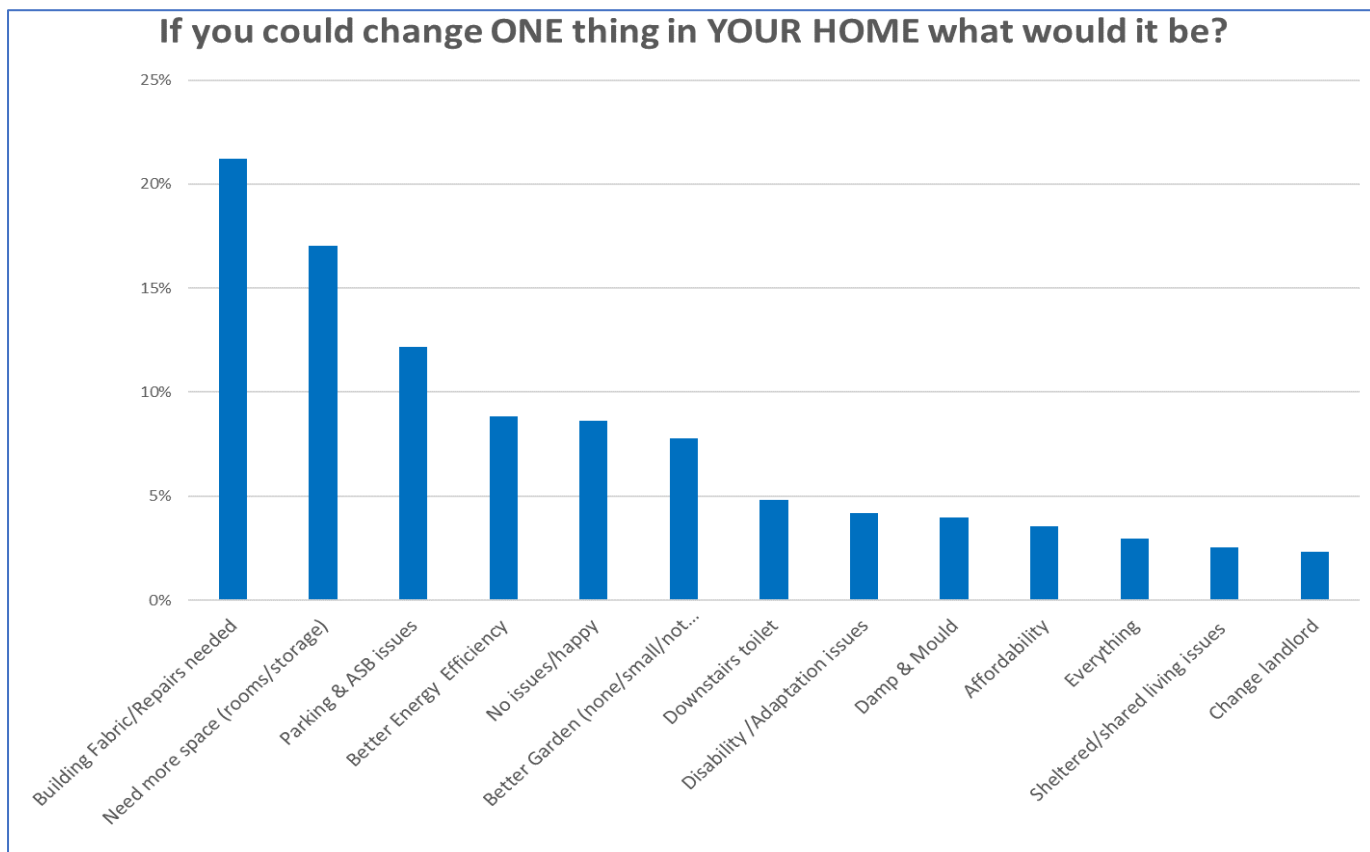
**Note 2**

These findings were uncovered prior to the removal of the temporary uplift of Universal Credit and Working Tax Credit allowance, and we know from Community Housing Cymru's recent report that UC has been fundamental to the ability of many tenants to manage their finances and stay out of debt. It is therefore anticipated that these figures will change if the £20 weekly increase be deducted in October 2021.

### Tenant Perceptions of Home

The aim of this question was to draw out the **one thing** that a tenant would change in their home if they were given that choice. That is not to say that this is the only one thing that they would change, it is simply what they deem the most important at the time of completing this survey. Tenants were given an open text box for this question provide their response).

### Social Housing Tenants



Building fabric and repairs needed came out as the most significant for tenants. We have analysed each key theme and broken them down for deeper understanding.

### **1) Building fabric/ repairs needed**

Almost half of the tenants felt that the one thing they would like to change about their home was the building fabric. There were negative views on windows, old and dated kitchens, bathrooms that needed modernising and common suggestions about the quality of the internal and external doors.

*"Kitchen 1980s ,wow"*

*"Windows are original wooden windows, which are draughty, do not meet double glazing standards and many are rotten from the weather"*

### **2) The desire for more space**

Tenants felt that they needed more space and storage in their homes. There was frequent reference to having more space in the kitchen.

*"My flat is tiny and I would appreciate more space"*

### **3) Parking and Anti-social behaviour issues**

Undesirable neighbours – drugs, noise and other ASB issues was the most commonly mentioned within this section. Tenants felt angry that despite the behaviours of neighbours being so impactful to their wellbeing, their landlord wasn't willing to evict.

*"Move the drug dealer who lives next door to me."*

### **4) Better Energy Efficiency**

There were clear frustrations from tenants relating to the cost of their energy bills due to having to use storage heaters etc. Tenants mentioned how they would like better insulation in their property as the winter is near impossible to keep the family warm without the unreasonable costs of additional heaters. They also felt the insulation would minimise noise and help with ASB issues.

*"Take the coal fire away - extra radiator instead"*

*"I would like it to be more energy efficient"*

### **5) Garden issues**

The importance of a garden has been emphasised throughout the survey responses. Whilst there were comments relating to tenants wanting a garden, the majority of comments related to concerns around the usability of their garden, i.e., needing landscaping, it being waterlogged and problematic fencing.

*"Different type of fencing needed, as it constantly needs repairing due to high winds"*

### **6) Desire for downstairs toilet**

We gave this its own category as it stood out within the tenants' comments. Tenants' reasons were split between:

- Health challenges of going up and down stairs
- Overcrowding with one toilet or bathroom for the whole family.

*"Downstairs toilet; disabled persons in our home"*

## 7) Damp and mould

We gave this its own category instead of adding it into the fabric and repair category (which would have taken that category up to 56%). Standing in its own right across all the social housing respondents.

*"To be free from black mould"*

*"Less black mould and damp"*

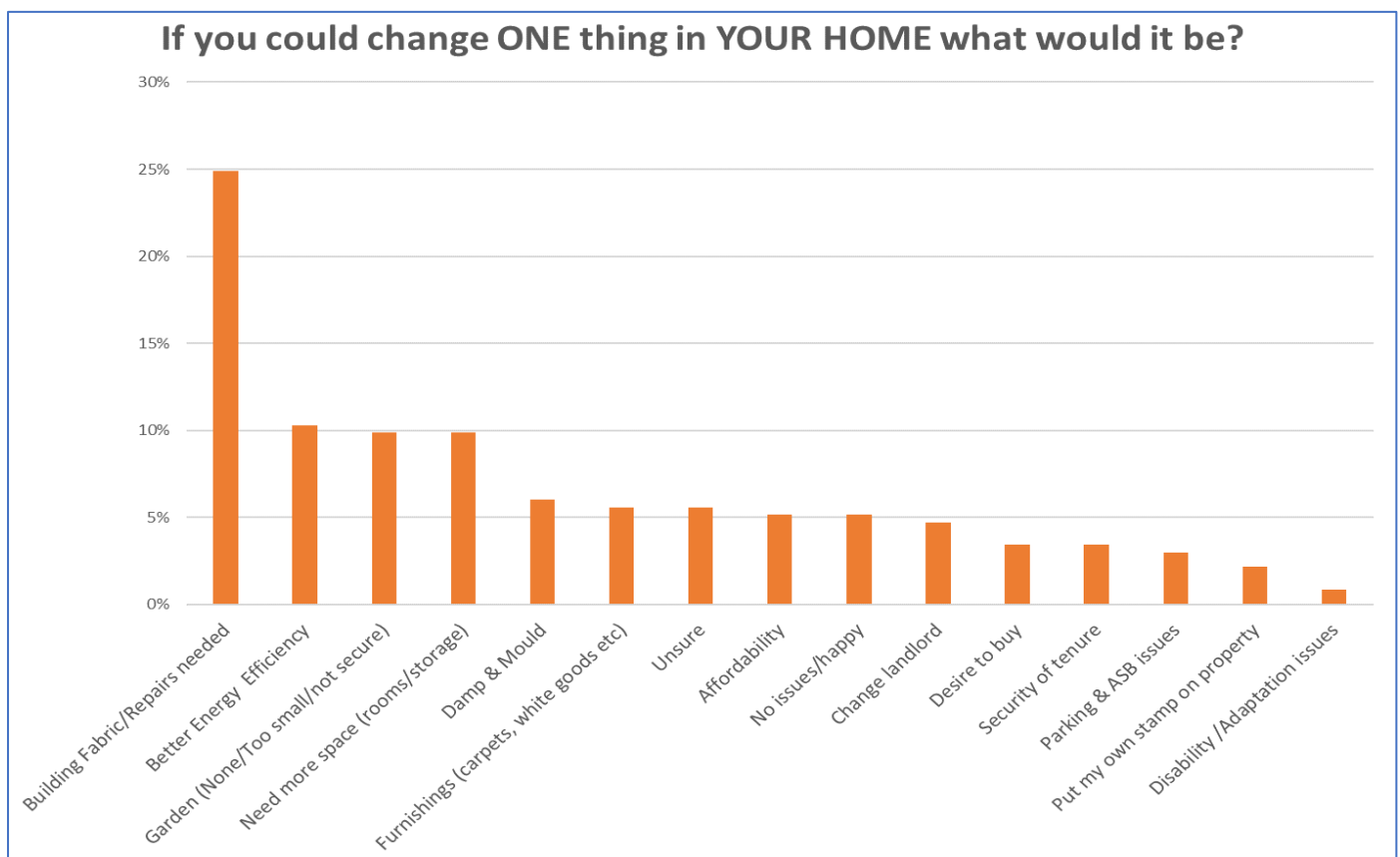
## 8) Observations from other smaller categories

- 5% would like to change their social housing landlord as the key thing they'd like to change – 'useless', 'don't care' etc
- There were frustrations with communal living – shared lounges in sheltered schemes, communal areas not maintained etc
- Affordability and Bedroom tax is frequently mentioned

*"To be able to afford the rent weekly without struggling"*

*"Wish that the council had never wasted money on the makeover of the [X] Estate in [North Wales]. We are still in a mess and this is not because of Covid"*

## Private Housing Tenants – what one thing would they change?



Similar to social housing tenants, there was a desire amongst private tenants to improve the state of their property, with building fabric and repairs being deemed the most important. Energy efficiency, gardens, and space also featured highly like social housing. However, the noticeable difference was a more even distribution across the categories.

Specific to private housing tenants were:

- Desire for better furnishings – mainly carpets and white goods
- Desire to own their property
- Desire to have that security of tenure that exists in social housing

### **Noticeable difference in PRS and Social tenants re landlord satisfaction:**

When expressing dissatisfaction with the landlord – a social housing tenant is more likely to use generic words like 'useless' or 'uncaring' but the same landlord concern themes attract much more specific comment from private housing tenants:

*"Like to know that my landlord wouldn't just let himself in and make excuses about why he did so"*

*"Landlord needs to understand that this is our home and not an air bnb"*

*"I would change my landlord. Letting agency does all they can, but landlord is neglectful and has left the flat to get into a state of disrepair"*

### **Specific PRS concerns**

*"House is perfect for us...:it would be, if it wasn't being sold!"*

*"Change the ability to make it a home, not allowed to decorate or hang pictures unless I return it to the letting condition when I leave"*

*"I want security and affordability I have neither"*

### **Tenant Perceptions of Local Community**

The aim of this question was to draw out the **one thing** that a tenant would change in their **local community** if they were given that choice. That is not to say that this is the only one thing that they would change, it is simply what they deem the most important at the time of completing this survey. Tenants were given an open text box for this question provide their response.

There were **four key themes** to come out of both social and private housing tenants. **A fifth theme was only present in social housing responses** which was the 'increased sense of community'. This didn't seem to be an expectation of those within private housing, but it was important to those in social housing.

### **More amenities for litter and waste**

*"Replace litter bins"*

*"People take pride in where they live and not litter or fly tip"*

*"Cleaner and better waste recycling"*

This was consistent in all local authority areas across all age groups.

### **Better public transport**

*"To have a bus service"*

*"A regular bus service"*



This was more common in North Wales and the Valleys in comparison to urban areas of south Wales coast.

The most recurring theme was:

### Increased sense of community

*"More community activities for children and young adults"*

*"More community spirit"*

*"More people getting involved in the community"*

### No Anti-Social Behaviour

*"More authority dealing with anti-social behaviour"*

*"More police presence to stop the drug dealing"*

*"Thinking about the safety of single females"*

*"To feel safe in my home and community"*

### Environmental planning

*"More parking"*

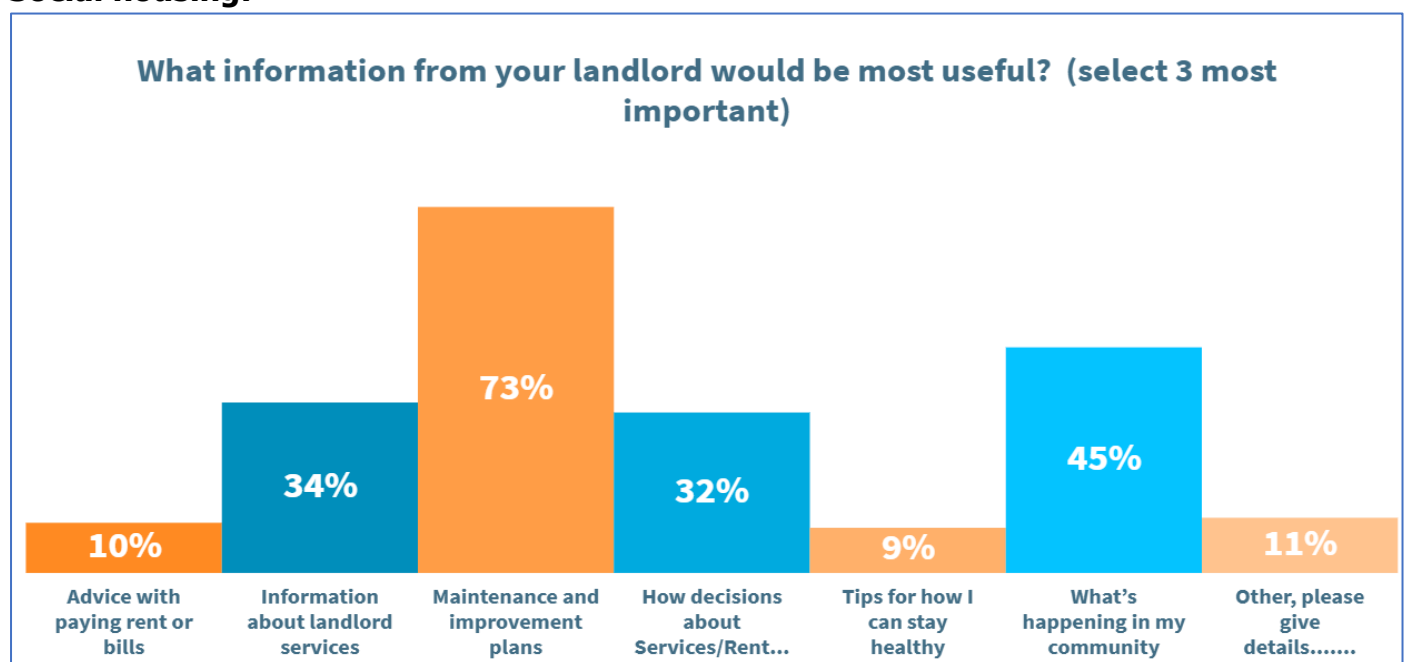
*"More green space"*

*"Keeping natural green space"*

### Tenants' views on Landlord's support

The aim of this question was to understand what tenants want to be informed about. Tenants were able to give 3 answers and they were provided with an open text box for this question.

### Social housing:



## PRS Tenants



**Key finding:** Overall the most important information tenants felt would be useful to receive, was in relation Maintenance and Improvement plans - this was the same for PRS (59%) and social landlord tenants. (73%)

**Note before we continue:** PRS tenants were given an additional question option that wasn't presented to Social landlord tenants; namely '**I don't want to hear from my landlord/letting agent**'. This was the second most popular answer from all PRS tenants at 35%. Whilst Social landlords have a regulatory duty to communicate and engagement with tenants, this option should have been included as a question for social housing tenants. We have noted this and other improvements for next year.

The second most popular answer for social housing tenants was receiving information about their community at 45%. This was not the case for PRS tenants (8%). What may account for this? Social landlords can often invest time and money on community development work which may add to the sense of community and is clearly valued/expected by the tenants. PRS tenants do not expect that from their landlord.

The third most popular answer for social housing tenants was information about landlord services 34% (PRS 19%) These figures/findings may be related to expectations i.e. the wide range of additional services provided by Social landlords? PRS tenants may not expect their landlord to provide additional services. Some PRS tenants put a question mark by this.

### **BAME identifying responders**

- Of the respondents identifying as BAME background, maintenance was again the most important factor (50% PRS and 58% social housing) however this is lower than general tenant population.
- BAME PRS tenants felt Maintenance, How decisions were made and Information about landlord services were the most important pieces of information they wanted to receive.

## AGE

Information about maintenance: there appeared to be a slight increase in the percentage of social housing tenants interested in hearing about maintenance linked to the age groups i.e. 58% of 18-30 year olds increasing steadily to 75% of over 60s.

For PRS tenants, the % of interested tenants under 45 was 68% average, while it was 50% of those over 60.

How decision about services are made: PRS tenants over 45 years old were less interested in hearing about this than Social landlord tenants 16% of 45-60 years old PRS and 33% of the same age range in social housing.

Over 60s 8% of PRS tenants v's 35% of social housing tenants.

Information about landlord services: nobody in 18-30 group of social housing tenants wanted information whereas 23% of PRS tenants in that age group did. These figures then increased as the age groups did with 41% of those over 60 in social housing wanting to receive information about landlord services and only 10% of over 60s in PRS. PRS tenants interested in information on landlord services decreased with age.

The option for PRS tenants around not wanting to hear from their landlord also increased with age 29% of 18-30 years olds up to 44% of over 60s.

## LOCATION

In the PRS, every answer had referred to 'Maintenance' and 'Not wanting to hear' from their landlord as being important. Only 2 LA areas hadn't ticked 'Information about Landlord Services' and only 6 LA areas hadn't ticked 'How decisions about services are made'.

Social housing tenants in every LA area bar 1 had 'Maintenance' as highest scoring. Every LA area had ticked 'What's happening in your Community' as well as the 'Information about Landlord Services' as important. Only 1 LA hadn't shown that information about 'How Decisions are Made' was important.

## What tenants said

*"Please listen to your tenants, get out of your offices!!!! And visit occasionally and find out what is really going on and keep the tenants informed" (social landlord tenant)*

*"A walk through the house with a staff member to highlight worries with the house, repairs needed and any disability worries." (social tenant)*

*".. feedback from the various departments before having to ask for it ... very quick to want help/information from tenants, but extremely slow in giving much needed feedback, to the point of non-existence, tenants then feel ignored.....prior knowledge to communal repair would be respectful" (social tenant)*

*"I want more thorough background checks on landlords, people should make sure they are keeping tenants safe - we shouldn't be the ones chasing him about the annual gas safety check" (PRS Tenant)*

*"Repairs need to be carried out for health and safety reasons but the letting agents don't seem bothered. (PRS Tenant)"*

*"Would like a long-term commitment to maintenance due to ageing fixtures and fittings" (PRS Tenant)*

## **What tenants believe their landlord's priorities should be**

Tenants were given a free format box to capture immediate thoughts on what the landlord should focus on

### **Social Housing**

The comments reflected 4 key themes as follows:

#### **1. Maintenance & repairs**

The maintenance and repair of homes both internally and externally was seen as key priority social landlords should focus on in the future.

The need for landlords to invest in the standard and repair of existing homes was also identified with some raising concerns that landlords are too focussed on developing new homes at the expense of existing homes.

*"Getting repairs right and improving existing homes before building new ones"*

*"I pay ever increasing rents so they can build fancy new homes, yet my windows are falling out"*

*"Some residents called for greater proactive checking of maintenance standards of homes to prevent longer term and more costly repair issues arising."*

*"Need to maintain the property to a good standard at all times so it doesn't become an urgent job later"*

Maintaining external areas and outside appearance of homes was also seen as important, including checking the standard of regular grounds maintenance work, communal cleaning etc.

#### **2. Communication & Transparency**

Listening and acting on tenant's concerns was a common theme raised with more attention to this being seen as essential to improve communication and trust.

Better communication with tenants was an area where landlords could be more tenant focussed. In particular, calls for landlords to be more proactive in engaging with tenants within their local communities and face-to-face rather than relying on online contact was seen as important.

*"Listen to every tenant – their story is their own to tell"*

*"Listen to the worries of tenants and communicate with us – not just online"*

*"Visit the sites occasionally – we do live here!!"*

#### **3. Affordability & value for money**

Ensuring rent and service charges are affordable was seen as important area for landlords to focus on. In addition, having properties where energy costs are affordable was also important to tenants so that they could afford to adequately heat and run their homes.

Landlords focusing on achieving better value for money was seen as an important way to keep rents and service charges affordable for tenants.

*"Homes need to be affordable and cheap to run".*

*"Need to keep rents affordable for tenants on low incomes"*

#### **4. Safety & Support**

This area focussed not just on the safety of buildings - tenants' homes - but also on feeling safe through landlords responding to incidents of ant-social behaviour (ASB).

Clearer understanding of how landlords will deal with ASB was called for and for landlords to be more proactive in taking action, including communicating and supporting those experiencing ASB. In addition, there were recommendations that landlords be more considerate and sensitive when allocating properties in order to prevent possible ASB from developing in schemes.

*"Priority should be helping tenants who suffer through having nuisance neighbours".*

*"Landlords need to be out and about in the community responding to ASB and keeping tenants informed of what's happening"*

Supporting tenants, particularly support for those seen as 'vulnerable' was a priority area landlords should focus on. This included helping tenants settle into new homes, supporting tenants with health & wellbeing needs and providing money advice where needed.

#### **PRS Tenants views on Landlord priorities**

Whilst respondents commented on areas for landlords to prioritise there were also a number of positive comments about PRS accommodation and related services.

The comments regarding priorities reflected 2 key themes.

##### **1. Maintenance & repairs**

The maintenance and repair of homes both internally and externally was seen as key priority for PRS landlords should focus on in the future. This was also a key theme identified by social housing tenants.

Similarly, PRS tenants called for greater proactive checking of maintenance standard of homes

*"Need to keep up with repairs promptly so things don't get worse "*

The need for PRS landlords to invest in the standard of repair and refurbishment of PRS existing homes was also identified

*"Investing in the property so tenants feel invested in and cared for"*

External areas were seen as an important area for this investment, including shared communal entrances and outside areas.

*"Routine maintenance and repainting of interior and exterior is needed".*

##### **2. Safety of home**

Keeping homes in the PRS safe was a key priority identified by tenants. This included maintaining homes to a good standard, addressing any problems such as mould or damp as well as keeping any appliances safe and regularly checked.

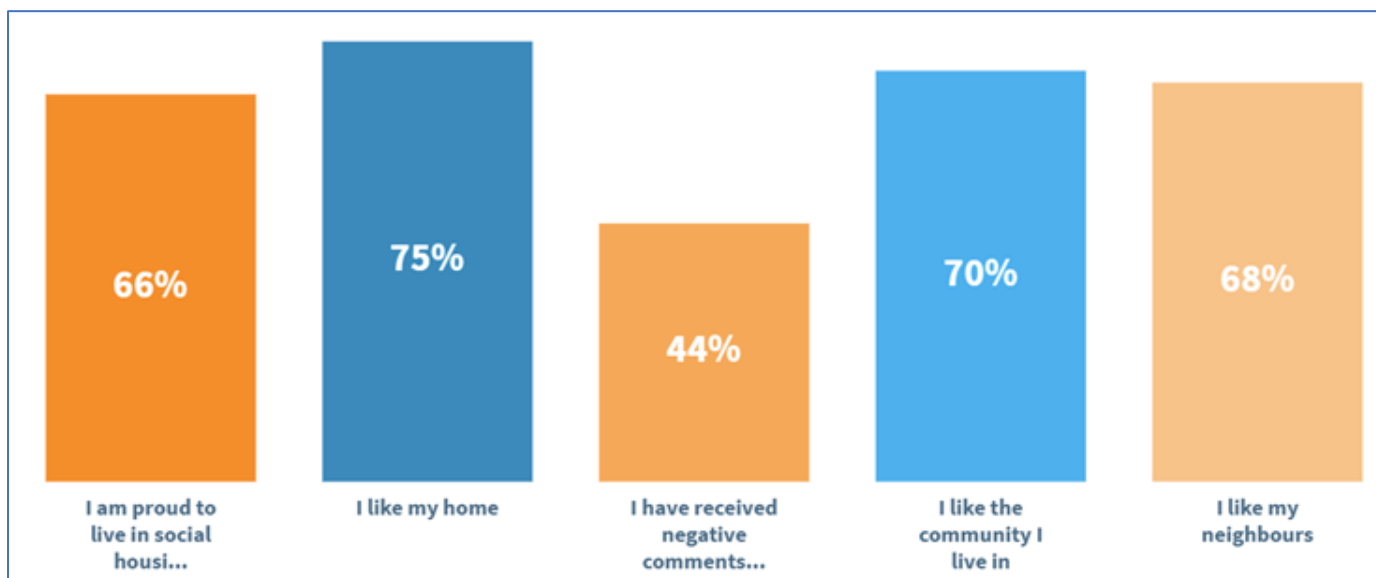
Ensuring homes are safe for young families was also identified, to ensure properties are safe and suitable when housing families with young children.

*"Safe and family focussed housing suitable for children"*

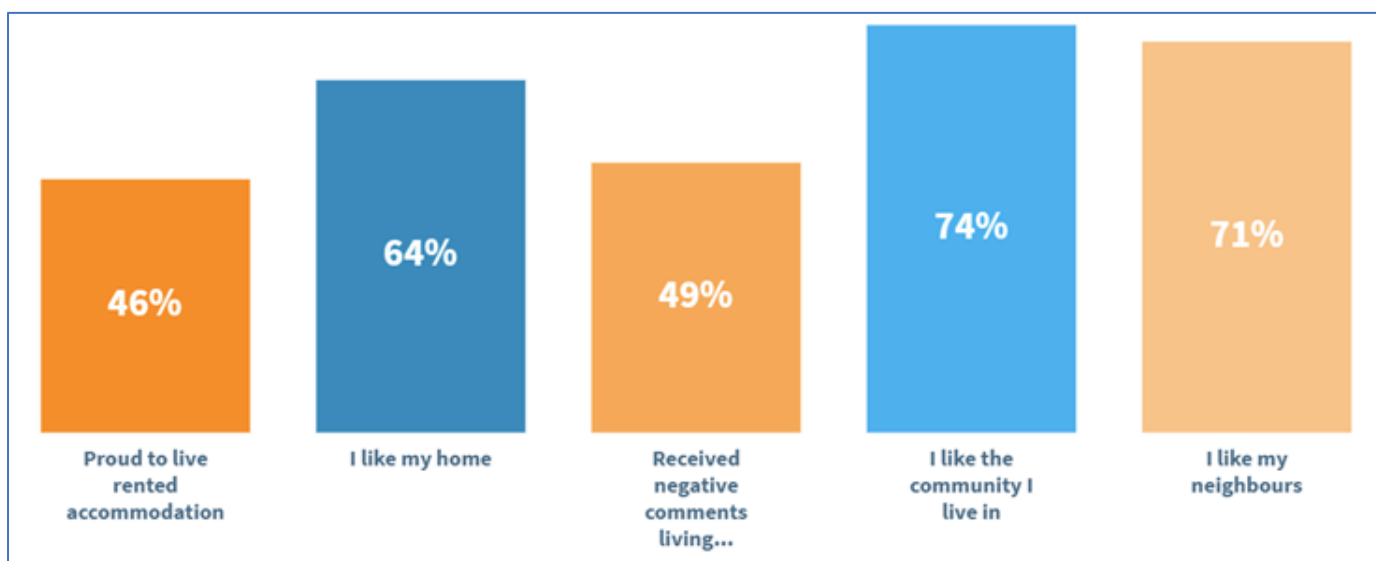
## Which of these do you agree or disagree with?

The aim of this question to assess how satisfied tenants were with their home and community. They were able to choose multiple answers and they were not provided with a text box.

### Social housing tenants



### For PRS tenants



Across the categories above, social housing tenants seem happier in social housing than private renting tenants with regard their home and community. Looking at replies in other part of the survey, social housing tenants talk of tenure security, higher trust in landlord/area, repairs and properties adapted their needs.

There is still reasonable positivity from private renters about the actual home, community, and neighbours, but there are clear signs of social/society pressure on private renters manifesting in receiving negative comments, and feeling of 'failure'.

Looking at comments from other questions you see the quote made by older friends and family to the PRS renter "...if you bought less Avo toast and coffee, you could afford your first house like we did..." [that older generation failing to acknowledge that they bought their home when jobs for life

existed, and homes were only approximately three times your average earnings from the mid-50s to the mid-90s. Whereas today, a property is nine times average earnings. *Source: Schroders 2019 Analysis based on Bank of England data.*

Breaking it down further:

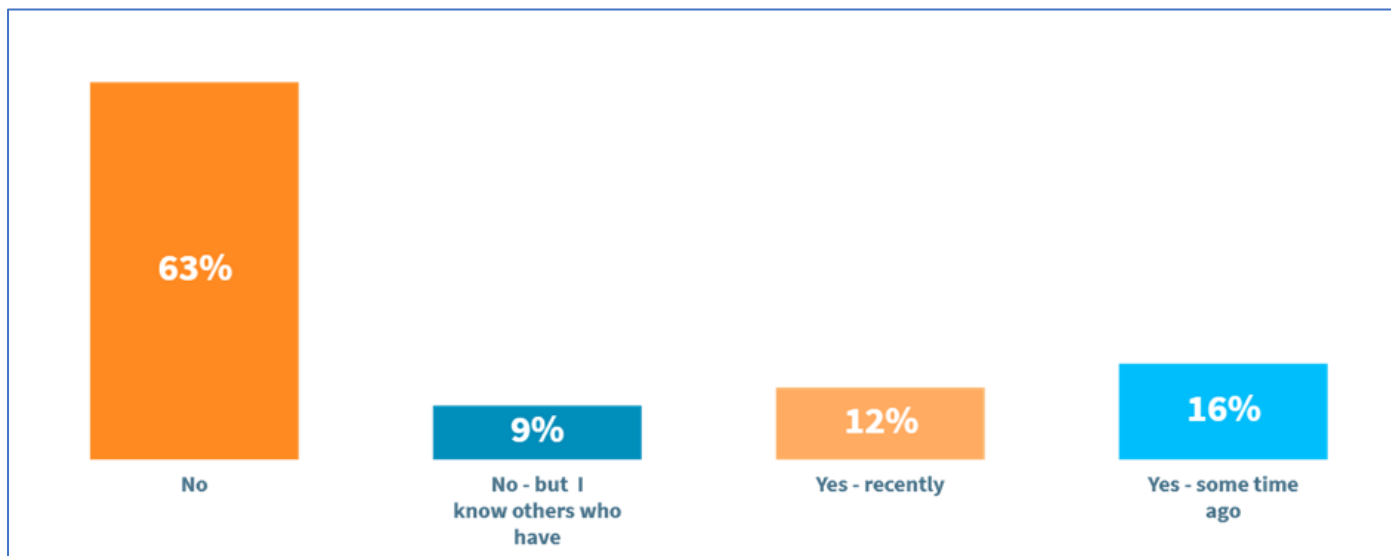
- 1) BAME identifying social housing tenants: there are generally lower levels of satisfaction amongst BAME responders with social housing. Of particular note is 53% (i.e. more than half) of BAME social housing tenants saying they have received negative comments about living in social housing compared to 43% for non-ethnically diverse tenants.
- 2) Re PRS BAME tenants – compared to 'all PRS' they are statistically happier in their home but less satisfied with their community & neighbours. They have also experienced less negative comments (45%) than 'All PRS' (49%)
- 3) Council tenants v's Housing Associations V's Supporting Housing - Generally no noticeable differences. However:
  - Council tenants liked their neighbours better (+5% difference)
  - Supporting housing tenants have experienced higher level of negative comments from others about living in social housing (at a level similar to BAME responders). They also scored 'like my neighbours' noticeably lower. (10-15% lower)
- 4) Is there a difference in PRS satisfaction of renting direct from landlord v's letting agency? There isn't much difference – the only noticeable difference was a lower level of pride in living in rented accommodation from those via letting agent.

### **Have you ever received negative comments, threats or felt discriminated as a result of living in social housing/private renting?**

#### **Social housing tenants**



## PRS Tenants



## Social housing

A slightly higher percentage (30% vs 28%) of tenants in social housing vs those in private have received negative comments, threats, or discrimination for living in rented accommodation. 11% of those were recent and 19% were in the past. 13% of tenants knew people who had experienced the above.

Unlike tenants in the private sector 30% of tenants who identified as BAME in social housing had had more recent experience of discrimination and threats than those in the private sector. 30% had also had these experiences in the past and 40% had had no experience of this at all. When looking at the variations based on age, 17% those aged 45- 60 had recently received discrimination etc which was the highest percentage across the ages in this category. 63% of those aged 60+ hadn't received discrimination and 33% of those aged 18-30 had in the past.

## PRS

28% of tenants in the private sector have received negative comments, threats, or discrimination for living in rented accommodation. 16% of this was considered some time ago and 12% was recently. 9% of those that hadn't experienced this, knew people who had.

The highest percentage of tenants to have received negative comments in the past or know others who have received negative comments, threats or discrimination were those who identified as BAME. 34% of BAME tenants knew someone who had received negative comments, threats, or discrimination and 33% had received comments in the past. However, there were no tenants who reported that they had had this experience recently.



## How likely tenants are to recommend their landlord to a friend or colleague?

Note: This question was asked of PRS Tenants ONLY (This addition was based on PRS tenant feedback. We plan to include this question for social housing tenants next year.)

The aim of this question was to understand whether tenants would recommend their landlord to others. They were provided with a standard 0-10 scale to grade their likelihood of recommendation. Tenants were not provided with a text box.

Net promoter score (NPS) is a widely used market research metric. The NPS is typically interpreted and used as an indicator of customer loyalty.

According to Doopoll, (our insight partner) '+25' is considered a good Net Promoter Score. Their clients including a number of well-known Welsh brands and public organisations such as Welsh Rugby Union, Welsh Government, Federation of Small Business, a number of Welsh Housing Associations etc.

The 'All PRS renters' result is not positive – there is a significant NPS score of '-28'. This is a result of 52% having a negative opinion of their landlord, 22% indifferent and only 25% of tenants who would recommend their landlord.



When we break it down (table overleaf) we have identified marked differences.

- 1) Those renting via a letting agent seem less likely to recommend their landlord than those with a direct relationship with their landlord. (See table overleaf)
- 2) Age of renter is significant. Younger renters are far less likely to recommend their landlord than older renters. The negative NPS figures are very concerning.

Why is that? There are a number of factors that could contribute to these findings, such as, Affordability for younger people? Not being listened to/taken seriously? Older people more confident to stand up to landlord/agent? Older renters know their rights better? Or do older renters settle for status quo? Further investigation is needed.

Segment	Net Promoter Score	% Detractors	% Passive	% Promoters
<b>All PRS tenants:</b>	-28	52%	22%	25%
<b>Landlord direct:</b>	-20	48%	22%	29%
<b>Via Letting Agent:</b>	-40	59%	21%	19%
<b>Age</b>				
<b>18-30</b>	-67	72%	21%	6%
<b>30-45</b>	-37	52%	30%	16%
<b>45-60</b>	-16	48%	18%	32%
<b>Aged 60+</b>	-13	49%	14%	36%

Final note – the data was not statistically significant enough to filter down on other factors such as:

- 1) Welsh speaking,
- 2) Identify as Black, Asian & Ethnically diverse
- 3) Breaking down by the 22 local authorities

Whilst there was insight, it didn't pass our statically significant controls.

## Conclusion

This report explores the views of tenants from across Wales and across tenure. It investigates perceptions and attitudes towards their homes, their communities and the issues that matter most to them. Overall, there were a number of concerns that tenants felt weren't being addressed. Almost two thirds of tenants felt that whilst they were planning on living in their home for a long time, they would like these key issues to be taken care of. Inclusive of Anti-Social Behaviour issues, adaptations of their properties relating to disabilities and for those in the private housing sector, the need to feel secure in their tenancy.

Tenants living in social housing were much more reliant on Universal Credit as their main source of income compared with those in the private housing sector and are therefore amongst the groups of people that will most likely be impacted by £20 per week UC removal. There were very clear differences amongst satisfaction levels in relation to affordability, maintenance, community, energy efficiency, mould and damp and size suitability within different Local Authority areas. The lowest levels of satisfaction were found in relation to energy efficiency with rankings of only 7% believing their home to be energy efficient. Almost half of tenants are struggling with damp and mould within their homes with similarities across both the private and social housing sector. Whilst we know that the targets of Net Zero 2050 provides an opportunity to offer better insulation and clean heat, it is clear that tenants are already feeling the burden of their cold and damp homes and if we don't act quickly, not only are we condemning tenants to another 30 winters living in such conditions, but we are showing tenants that their concerns aren't important.

When asked about interaction with landlords, tenants were predominantly engaging with their landlord when logging repairs and maintenance but those in the social housing sector had higher overall engagement, despite only 18% of respondent being engaged in decision making. There were noticeably higher levels of requests for maintenance and repairs by BAME tenants and only a quarter of those had reported any communication at all with their landlord which was significantly different to the general tenant population. This highlights the challenge the sector has to tackle to improve communication and engagement with ethnically diverse communities. As may be expected, tenants in the private housing sector had much lower levels of engagement with their landlord and predominantly felt that this was the way they like it.

Tenants made clear recommendations about their expectations of their local community, which included the need for more amenities for litter and waste, better public transport, and less anti-social behaviour. Their views on landlord support for both sectors centred around wanting more information about maintenance and improvement of their homes. Almost half of social housing tenants wanted to hear about what was happening in their community whilst less than 10% of private tenants felt the same way. In terms of landlord priorities for the future, maintenance and repairs and maintenance, communication & transparency, affordability & value for money and safety and support were essential to social housing tenants whereas private housing tenants simply think their landlord should focus on maintaining their property and the safety of their home.

There was a significant proportion of tenants in social housing that felt that they liked their home, more so than those in the private sector, however, BAME tenants were far less satisfied in both sectors. Opposingly, tenants in private housing felt more comfortable in their community and with their neighbours than those in social housing. Unlike much of the research suggests, tenants living in social housing were proud of where they lived which wasn't so much the case for those in the

private sector and unfortunately, negative comments around renting a home were prevalent amongst both social and private tenants.

The direct relationship with a landlord seems to impact whether tenants in the private sector would recommend their landlord to a friend. Age was also a significant factor to understand the likelihood of recommendation. Younger renters are far less likely to recommend their landlord than older renters.

## **Next Steps**

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

We will be sending this report to key decision makers across the housing sector including Welsh Government, Housing CEOs and Heads of Service asking for their conservation and action. All tenants who completed the survey and opted for a copy of the report have been sent a copy ahead of publication.

We will be running briefing sessions with tenant and housing staff to discuss the findings of the reports. Look out for details on our website and social media.

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](mailto:enquiries@tpas.cymru)

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

### Notes:

- 1) Media enquiries contact David Wilton [drw@tpas.cymru](mailto:drw@tpas.cymru) 07896871164
- 2) To view our other Pulse Reports please visit [www.tpas.cymru/pulse](http://www.tpas.cymru/pulse)
- 3) To learn more about Tenant Pulse, and request promotional material for awareness building contact [elizabeth@tpas.cymru](mailto:elizabeth@tpas.cymru)

## 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 Housing for the year-round lead sponsorship.

This is the first of a planned Annual All Wales Tenant survey on tenant attitudes to home living and their relationship with their landlord. We acknowledge further refinement and improvement is possible going forward annually and would welcome any comments.

## About TPAS Cymru



TPAS Cymru has supported tenants and landlords in Wales for more than 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](http://www.tpas.cymru/pulse). The aim is:

- i) Find out what matters most to tenants
- ii) Communicate findings and recommendations via regular reports
- iii) Reward tenants who take part via prize draws.

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 a program of work looking to amplify the voice of tenants. We are very grateful to the Pobl Group who sponsor this work.

To meet one of our team to discuss the points raised, please contact: David Wilton on [DRW@tpas.cymru](mailto:DRW@tpas.cymru)

## Appendix A: Questions

<p>1. So, we can understand you better, are you a..</p>	<p>Housing Association tenant Local Authority tenant Private Landlord tenant Supported Housing Tenant</p>
<p>2. Which Local Authority Area do you live in?</p>	<p>Blaenau Gwent Bridgend Caerphilly Cardiff Carmarthenshire Ceredigion Conwy Denbighshire Flintshire Gwynedd Merthyr Tydfil Monmouthshire Neath Port Talbot Newport Pembrokeshire Powys RCT Swansea Torfaen Ynys Môn Vale of Glamorgan Wrexham</p>
<p>3. Who is your landlord</p>	<p>Adra Aelwyd Housing Association Ateb Barcud Bron Afon Bro Myrddin Cadwyn Cardiff Community Housing Association Catreffi Conwy Clwyd Alyn Coastal Housing Cynon Taf HA Taff Housing Family Housing Grwp Cynefin Hafod Linc Melin Homes Merthyr Valley Homes Monmouthshire Housing Association Newport City Homes</p>

	<p>Newydd HA  North Wales HA  POBL Group  RHA  Tai Calon  Tai Tarian  Trivallis  United Welsh  Valleys 2 Coast  Wales &amp; West  Caerphilly Council  Cardiff Council  Carmarthenshire Council  Denbighshire Council  Flintshire Council  Pembrokeshire Council  Powys Council  Swansea Council  Vale of Glamorgan Council  Ynys Mon Council  Wrexham Council</p>
4. What is your age?	<p>18-30  30-45  45-60  60+  Prefer not to say</p>
5. Do you consider yourself as BAME (Black Asian Minority Ethnic) background?	<p>Yes  No</p>
6. How would you describe your current renting situation?	<p>Stay in this home for a long time  Until I can afford to buy  Like a different size home due to size  Like to move to a different area  I am in retirement accommodation  Not settled in my home  Other</p>
7. How would you describe your household income situation?	<p>Mainly from Universal Credit/ other Welfare payments  Mainly from working/ earned income  Mainly retirement income/ earned income  Mainly training and education support payments  Other</p>
8. Is your home any of the following? (feel free to add comments)	<p>Affordable  Well maintained  In a good community  Energy efficient  Free from damp and mould  Suitable in size for your needs  Other</p>
9. In the last year, what interaction have you had with your landlord?	<p>Logged repair/ maintenance request  Contact landlord to query something  Completed a tenant survey</p>

	<p>Attended event/ meeting</p> <p>Made a complaint</p> <p>Seen landlord communications</p>
10. If you are struggling to pay rent / bills, what is causing this?	<p>It isn't an issue for me, I am able to pay my rent/ bills</p> <p>My rent is too high</p> <p>I have irregular wages</p> <p>I have a low income</p> <p>I was made redundant</p> <p>I have had covid related issues – furlough/ limited work/ isolation</p> <p>My Universal Credit/ Welfare payments are too low</p> <p>A household member is not contributing</p> <p>I have had delays with welfare payments</p>
11. If you could change one thing in your home, what would it be?	(Open Comments Box)
12. If you could change one thing in your local community, what would it be?	(Open Comments Box)
13. What information from your landlord would be most useful?	<p>Advice with paying rent or bills</p> <p>Information about landlord services</p> <p>Maintenance and improvement plans</p> <p>How decisions about services/ rent are made</p> <p>Tips for how I can stay healthy</p> <p>What is happening in my community</p> <p>Other, please give details...</p>
14. What do YOU believe your landlords priorities should be?	(Open Comments Box)
15. Which of these do you agree or disagree with?	<p>I am proud to live in social housing</p> <p>I like my home</p> <p>I have received comments about living in social housing</p> <p>I like the community I live in</p> <p>I like my neighbours</p>
16. Have you ever received negative comments or felt discriminated against as a result of living in social housing?	<p>No</p> <p>No – but I know others who have</p> <p>Yes – recently</p> <p>Yes – some time ago</p>