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THE FOURTH ALL WALES ANNUAL REPORT

HOUSING THAT WORKS: A TENANT-DRIVEN APPROACH TO IMPROVEMENT

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TENANT VOICE SPONSOR

DECEMBER 2024
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Contents

Chief Executive Foreword

Croeso and welcome to TPAS Cymru's Fourth Annual All-Wales Tenant Survey on Tenant Perceptions. This yearly survey and report aim to capture the views of tenants across Wales about their homes, communities, and the issues that matter most to them. As the leading tenant engagement organisation in Wales, we believe this report offers decision-makers valuable insights into the real priorities of tenants.

We gathered responses from a diverse range of tenants, representing Housing Associations, Local Authority Housing, Supported Housing, and the private rental sector. This broad spectrum allows us to present a comprehensive view of tenant experiences and concerns across different tenures.

The report provides clear, evidence-based data that highlight the issues tenants care about most. It also includes insights from both the private and social housing sectors, divided into regions across Wales. This approach enables us to identify key similarities and differences between rural and urban areas, offering a nuanced perspective on tenant needs.

We hope you find this research both informative and thought-provoking, and that the sector sees it as an opportunity for positive change. TPAS Cymru looks forward to collaborating with tenants and landlords to implement the recommendations outlined in this report.

Finally, and most importantly, I want to extend our heartfelt thanks to every tenant who participated in this survey. Your input is invaluable in helping policymakers and landlords to make informed decisions based on your lived experiences. We are always eager to hear your feedback on how we can enhance this survey in the future. Our goal is for this annual survey to continue shaping improvements in housing services by reflecting tenant perceptions year after year.

David Wilton,
Chief Executive, TPAS Cymru

Overview

This report captures the views of 610 tenants across Wales, encompassing Housing Associations, Local Authority Housing, Supported Housing, and the Private Rental Sector (PRS). It provides insights into tenant experiences, challenges, and priorities while offering data-driven recommendations for improving housing services.

Key Findings

1. **Affordability and Financial Pressures:**
    - Keeping rents affordable remains the top priority, with 65% of tenants emphasising its importance (up from 58% in 2023).
    - Affordability challenges have intensified, with 49% of tenants struggling to pay rent or bills compared to 40% in 2023. Increased living costs and insufficient Universal Credit (UC) are key factors.
    - Private sector renting is a bigger financial struggle, seeing significant year on year decline of 'Renting till I can afford to buy'. Those aged 18-30 are the highest responders with those aspirations (78%).
2. **Maintenance and Energy Efficiency:**
    - Tenants from both sectors are desperate for clearer maintenance plans and this has become a rising priority (61%, up from 41% in 2023).
    - Tenants consistently rate energy efficiency of their home as one of the lowest satisfaction categories, highlighting the need for implementation of the new WHQS and clearer road map for private sector decarbonisation.
3. **Tenant Engagement:**
    - 60% of tenants are satisfied with landlord engagement, though younger renters (18-30) report lower satisfaction levels.
    - Social housing tenants are more likely to be asked for feedback (87%) than private renters (ie minimal engagement <5%).
    - More tenants than ever want to know what their rents and service charges are being spent on
4. **Living Conditions and Community:**
    - Satisfaction with homes is generally high (78%), though issues such as damp, mould, and poor energy efficiency persist.

- Tenants desire safer and cleaner communities, with reduced anti-social behaviour (ASB) and better public transport as their top community priorities.

5. **Demographics and Underrepresented Groups:**
    - Private renters aged 60+ have increased significantly (from 4% in 2023 to 34% in 2024).
    - Representation of LGBTQ+ tenants and carers has risen, though responses from Black, Asian, and Minority Ethnic (BAME) communities have declined compared to other recent Tenant Pulse surveys.

Recommendations

1. **Improve Affordability:**
    - With a new Welsh Government Rent Policy on the horizon, social landlords should encourage tenants to have their voice heard in the consultation to ensure rents are sustainable, amid rising living costs.
2. **Enhance Repairs and Maintenance:**
    - Develop transparent, actionable maintenance and improvement plans to share with tenants.
    - Prioritise repairs addressing damp, mould, and energy efficiency.
3. **Boost Tenant Engagement:**
    - Increase outreach to underrepresented groups and younger tenants to understand their unique concerns and preferable method of engagement.
    - Landlords to create transparent communications around rent and service charges that meet the needs of their tenant profile.
    - Landlords and agents in the PRS to be more transparent around rent setting with tenants to foster collaboration and trust.
4. **Focus on Energy Efficiency:**
    - Social landlords to communicate openly and honestly with tenants around the implementation of WHQS: Particularly around the elements that improve energy efficiency.
    - Landlords to educate tenants on available support or energy-saving practices.

5. **Strengthen Community Support:**
    - Landlords to address ASB through tenant-led initiatives and partnerships with local authorities and communicate better with impacted tenants.
    - Tenants rely on public transport and have been clear that this is something that they value and want to see improved. Welsh Government and Local Authorities need to continue working on regional public transport strategies to ensure a prosperous Wales.
6. **Targeted Support for Diverse Groups:**
    - Landlords to customise housing and support services for the aging population of tenants, LGBTQ+ individuals, and carers.
    - Address affordability and housing security for BAME tenants and those reliant on state benefits.

Next Steps

- Share findings with key stakeholders, including policymakers, housing providers, and tenant groups.
- Promote discussions on implementing recommendations through presentations and tenant workshops.
- Encourage landlords to adopt a tenant-centred approach, ensuring their voices drive decision-making.

Conclusion

The report underscores the importance of listening to tenants to build safer, more affordable, and community-focused housing. Implementing these recommendations will enhance tenant satisfaction and build long-term trust between landlords and renters.

Introduction to Tenant Pulse

Tenant Pulse is the national platform for Wales that enables tenants to provide anonymous accounts of their experiences, thoughts and feelings relating to their homes and communities.

They currently take the following form:

1) **Annual surveys** - subjects that we believe are important and need tracking. Currently there are 3 annual surveys.
    - Energy and Net Zero survey
    - Rent setting consultation.
    - 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 to help bring insight to policy developments.

3) **Specific audience surveys**: we undertake specific targeted surveys, including PRS Tenants in north Wales on support options, Housing Association tenants on regulation reform etc.

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

Purpose of this survey

Our Annual Survey provides invaluable tenant insights, helping us identify common issues and challenges specific to different tenures, whether in Housing Associations, Local Authority Housing, or the Private Rental Sector (PRS). Our goal is to equip everyone working in the housing sector in Wales with a clear understanding of how tenants perceive their homes, their communities, and the issues that matter most to them.

The findings and recommendations in this report offer critical insights into the challenges tenants face, as well as what they appreciate about their homes and communities. By listening to tenants and implementing their feedback, landlords can ensure tenants are at the heart of their organisation. We believe that fostering an open, honest, and transparent approach to policy and decision-making will help create homes and communities where tenants not only survive but truly thrive.

As the final Tenant Pulse survey of 2024 and the fourth in our Annual Survey series, we continue to champion the tenant voice. We are proud to have shared thousands of lived experiences with the aim of improving housing conditions and tenant well-being across Wales.

Author: Elizabeth Taylor
Supported by David Wilton, Eleanor Speer and Iona Robertson

Date: 3rd December 2024

Survey Promotion

The survey was sent to tenants including social and private sector renters, who signed up to our Tenant Pulse portal.

We saw publicity support from social landlords and tenant groups to their tenants. This level of engagement creates noticeable differences in tenant responses per landlord depending on the landlord's degree of engagement/promotion to their tenants.

Social media campaign

TPAS Cymru uses social media during our Tenant Pulse campaigns to promote the survey and raise awareness of our policy work. Per our usual policy, we launched a bilingual social media campaign to promote our Annual Survey to tenants, members, and the wider public. Since utilising social media in this way across all of our platforms, we have seen a rapid increase in responses, number of followers and general engagement.

Advertising

In line with previous TPAS Cymru practice regarding our Tenant Pulse surveys, we ran an advert through the Meta platforms to promote this survey to the wider public. This advert ran on both Instagram and Facebook and targeted those renting in Wales.

As seen to the right, our bilingual images were shared on multiple social media platforms.

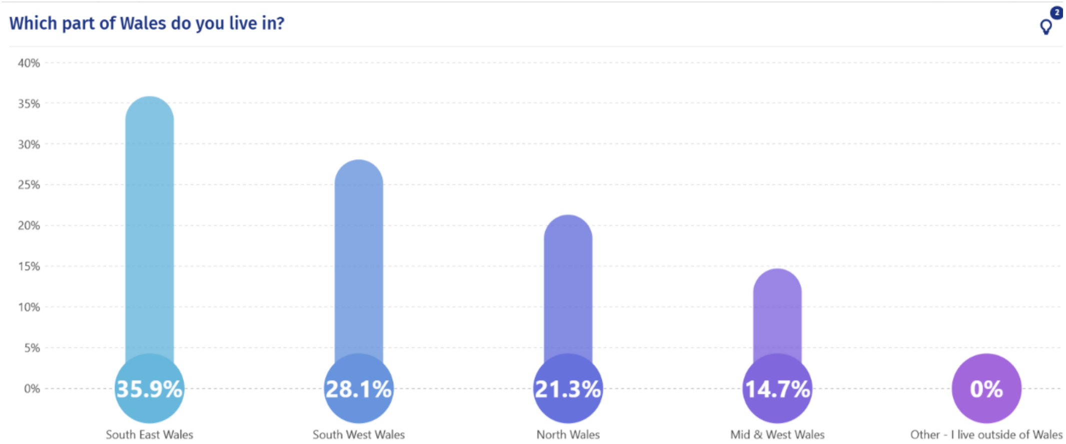
The advertisement ran through Meta for 14 days, reaching 49,960 users and providing more than 1,200 engagements with our Tenant Pulse work (responses, sign-ups, and building awareness of our policy work).

Note: at the back on this report in Appendix A is more insight as to how people heard about Tenant Pulse

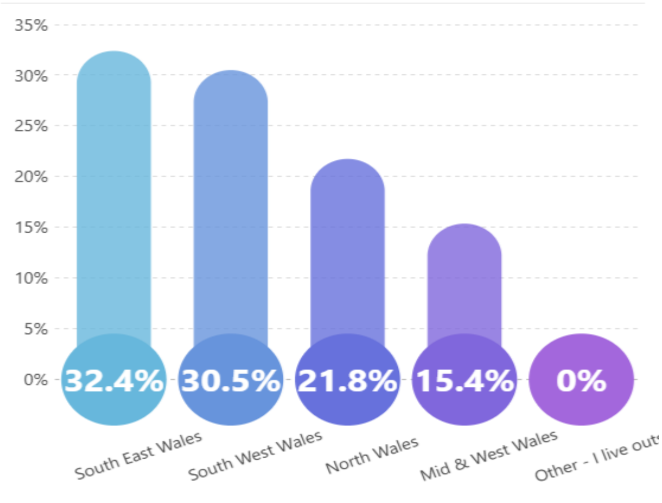
Demographics of respondents

We want Tenants from across Wales across all tenures to respond to this survey. As with previous years, our highest responding regions are urban areas which correlates with population density.

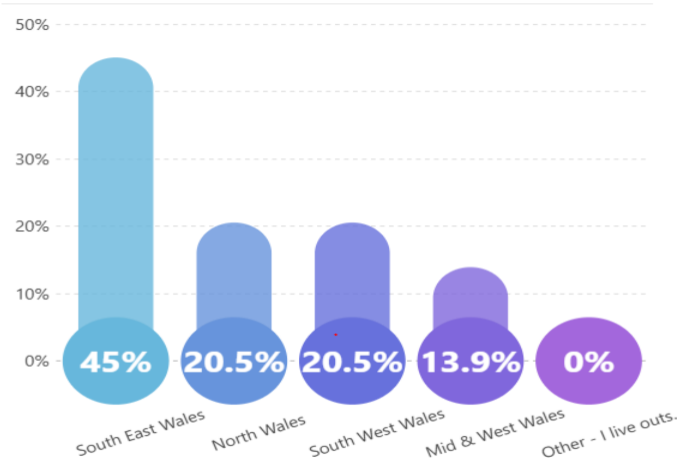
Regional responses from all renters



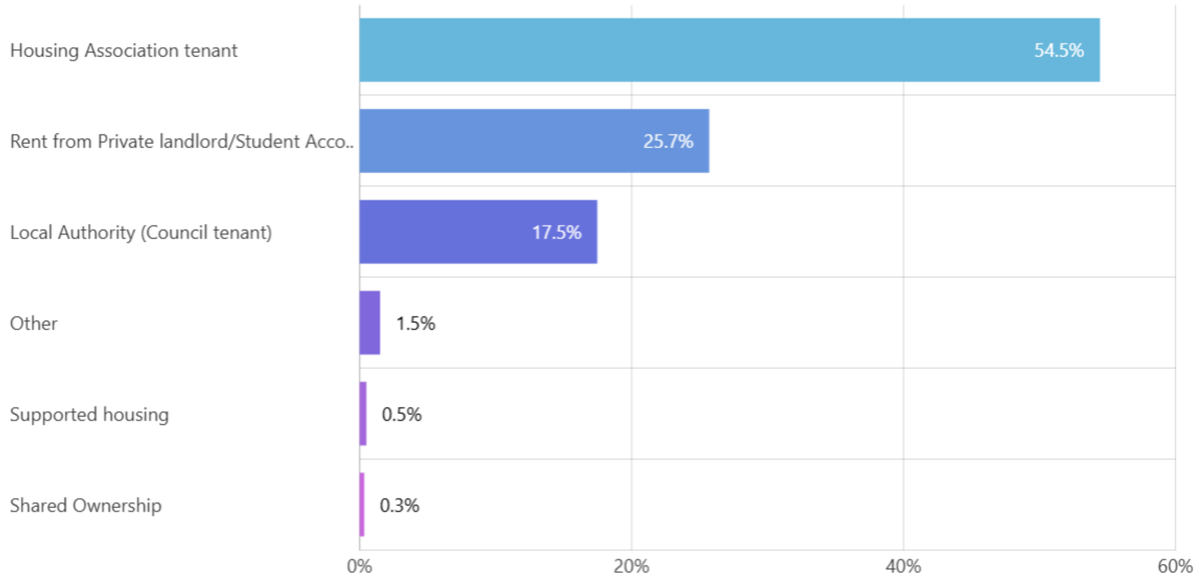
Demographics respondents in social housing



Demographics respondents in private housing



What type of tenants/renter responded by tenure



Out of the **610** respondents:

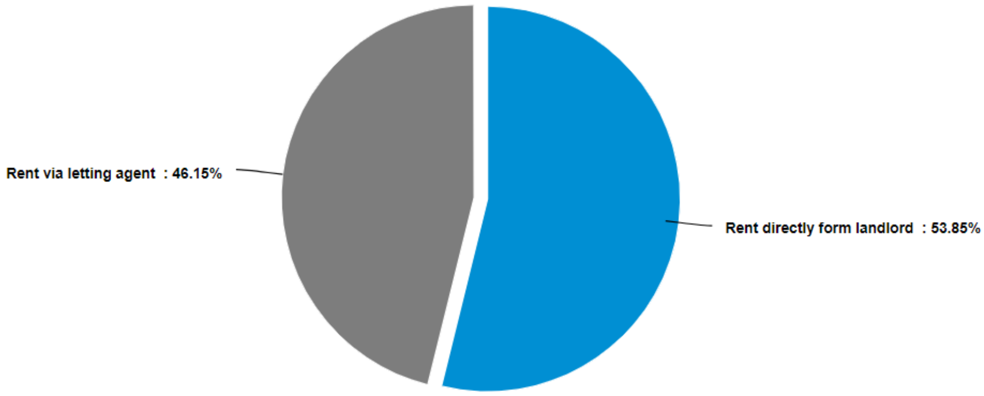
- 54% lived in a Housing Association property.
- 17% lived in a Local Authority property.
- 26% lived in a property owned by a private landlord.
- 0.5% lived in supported housing.
- 0.3% lived in a shared ownership property.
- The remaining 1.5% lived in a property they describe as 'other'.

Note: When compared with our 2023 Annual Survey data, the 2024 findings demonstrate a **less even split between social housing and the private rental sector**. However, having insight from each sector enables us to draw on the tenant experience and identify any differing opinions or perspectives.

Private tenants only

We asked private tenants if they rented from an agent or a private landlord in order to get a better understanding of the experiences of bothto influence the necessary policy makers.

You said you are private renter- do you rent directly from landlord or via a letting agent



A slight majority 54% rented directly from their landlord, in comparison to the 46% who didn't. 45% of these tenants live in Southeast Wales and the age range varied:

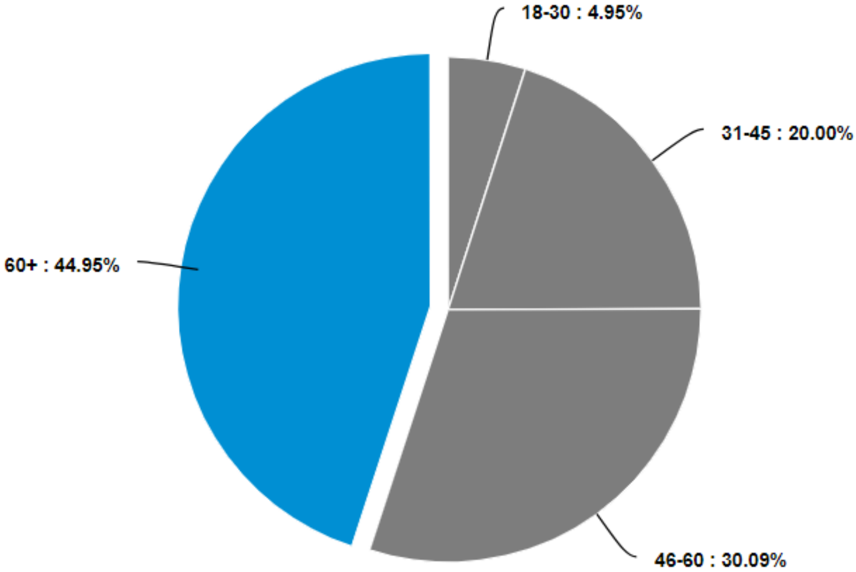
- 9% were aged 18-30.
- 34% were aged 31-45.
- 23% were aged 46-60.
- 34% were aged 60+.

When looking at underrepresented groups within the PRS:

- 24% identified as d/deaf or disabled.
- 19% identified as LGBTQ+
- 15% identified as a carer.
- 4% identified as BAME.
- 1% identified as Gypsy, Roma, Traveller.
- 9% identified that English or Welsh was not their first language.

Age groups

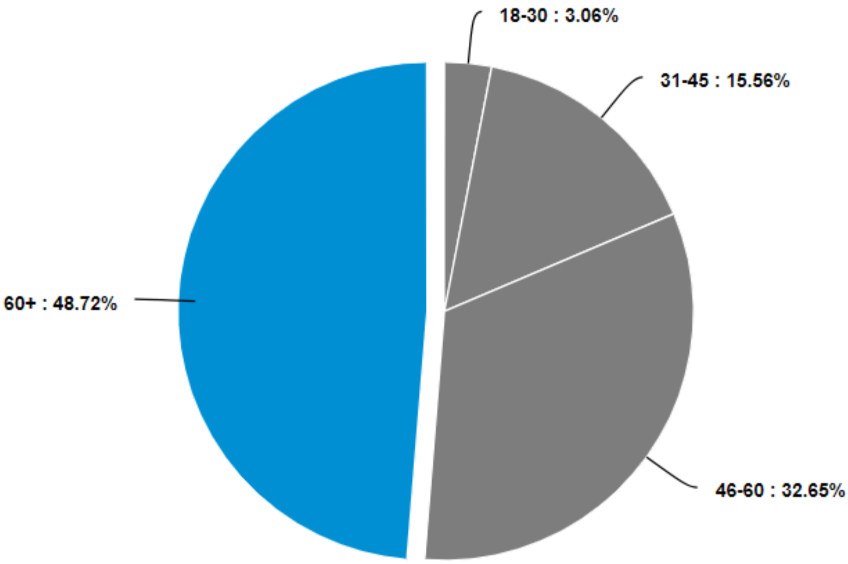
The age breakdown of all respondents overall was:



Key observations:

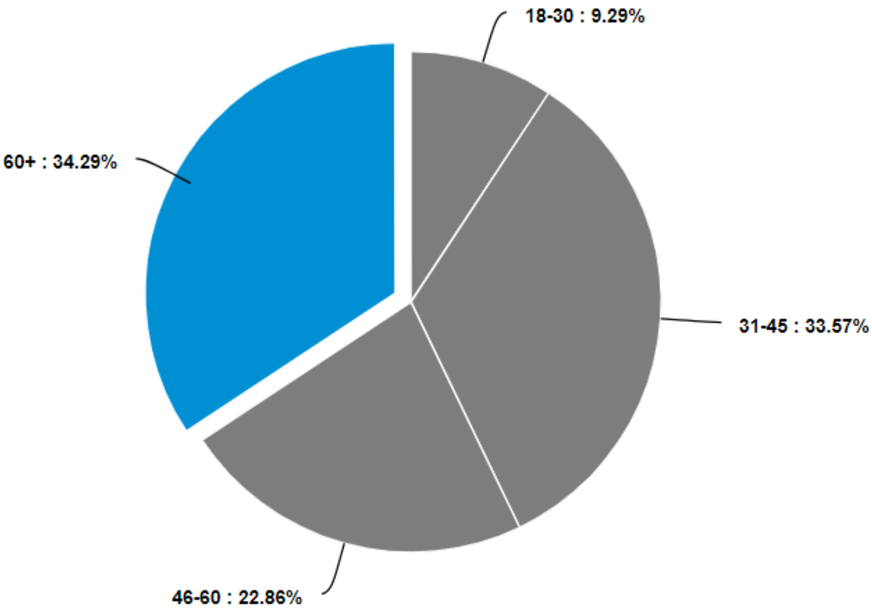
- We have seen an increase this time in responses from respondents aged 46-60 and 60+. Both of which are cross tenure.

The age breakdown of social housing respondents:



We have seen some similarities to 2023, with over 60s being the highest responding age group. However, there is an increase in responses from those aged 46-60.

The age breakdown of private housing respondents:



Notable variations since 2023

When comparing, we have seen a reduction from 44% in 2023, to 34% for those aged 31- 45 this year. We have, however seen a significant increase from those in the private sector aged 60+. From 4% in 2023, to 34% in 2024.

Underrepresented Groups

Last year we began asking respondents if they considered themselves or anyone in their household as belonging to any underrepresented groups, which we have continued to ensure wider understanding and representation.

Group	Overall %	Social Housing	Private Rental Sector
d/Deaf / Disabled	32%	34%	23%
Black & Minority Ethnic	2.4%	2.1%	4%
LGBTQ+	11%	9%	19%
Carer	14%	14%	15%
Gypsy, Roma or Irish Traveller	0.4%	0.2%	0.35%
English or Welsh isn't my first language	7%	7%	9.5%

Note: When asked the above question, an additional 3% of all responding tenants identified as belonging to the 'other' category. When commenting to explain, tenants identified groups including Mental Health challenges, Neurodiversity, invisible disability and 'Welsh Speaking'.

Notable variations since 2023

LGBTQ

We saw an overall increase of 4% in LQBTQ resposes. This was driven by social housing tenants. However there wa a fall within the PRS from last year, 31% of tenants identified as LGBTQ, and this year it was 19%.

Carers

Like with our overall LGBTQ responses, we saw a 4% increase in our responses from carers and a 10% increase within the PRS.

Black, Asian, Minority Ethnic – BAME

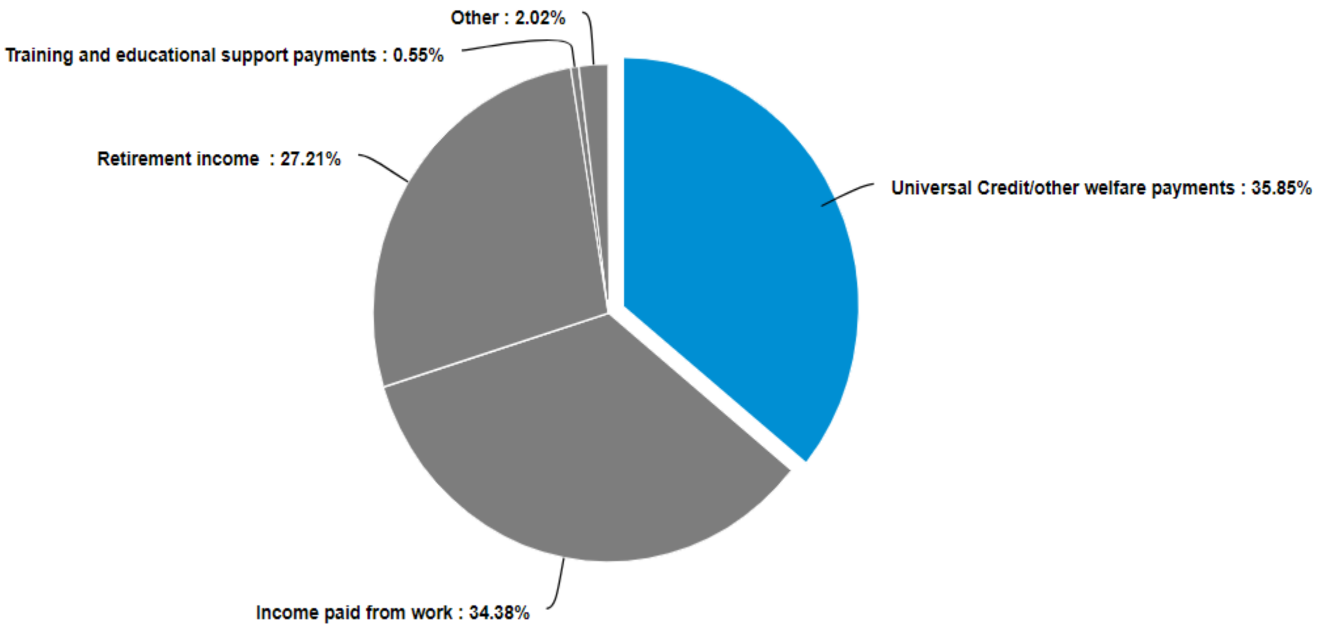
Unfortunetly, we have seen a 2% decrease in the responses from the BAME community.

d/Deaf / Disabled

Whilst the overall responses from our d/Deaf/Disabled community have remained the same, we have seen a 4% increase within the private sector which correlates with the aging population within amongst the PRS respondents.

Main source of household income

We asked respondents what their main source of household income was.

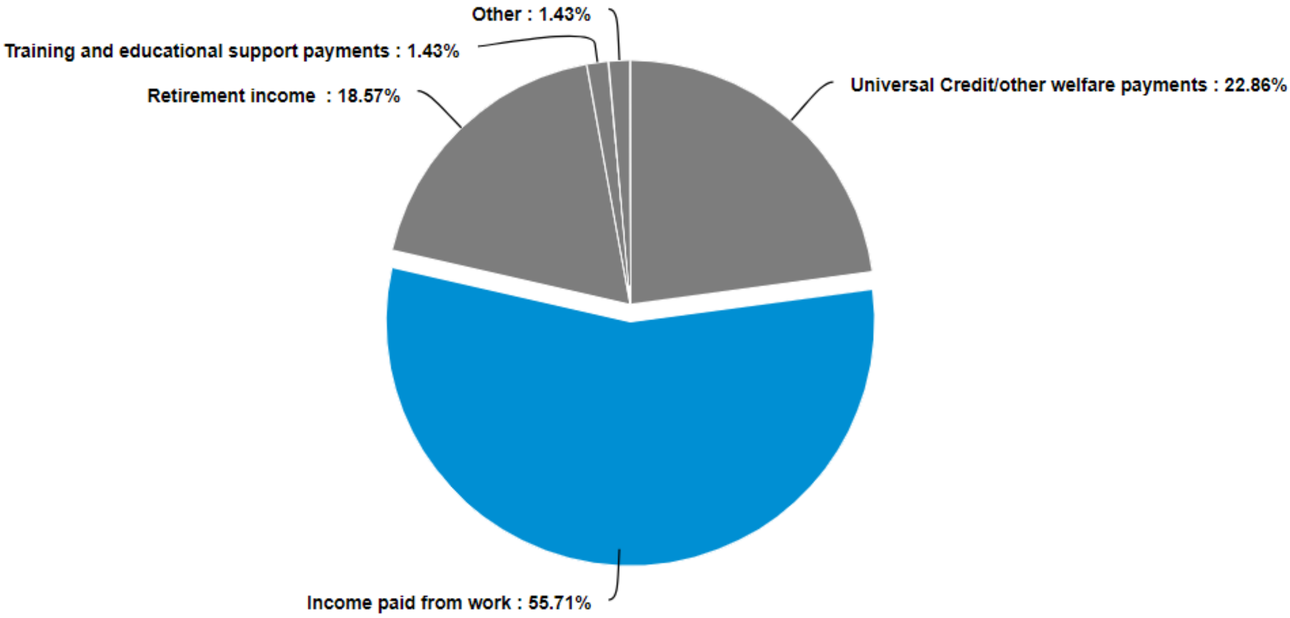


Changes in responders compared to last year: we have seen a reduction in those with 'income paid from work' as their main source of income and an increase in those on Universal Credit and Retirement income. There was also a reduction in those whose main income was from training and educational support payments.

2023: Income from paid work was at 48%
2023: Income from retirement payments were 18%
2023: Income from Universal Credit was 29%
2023: Income from training and support was 3%

Private renters

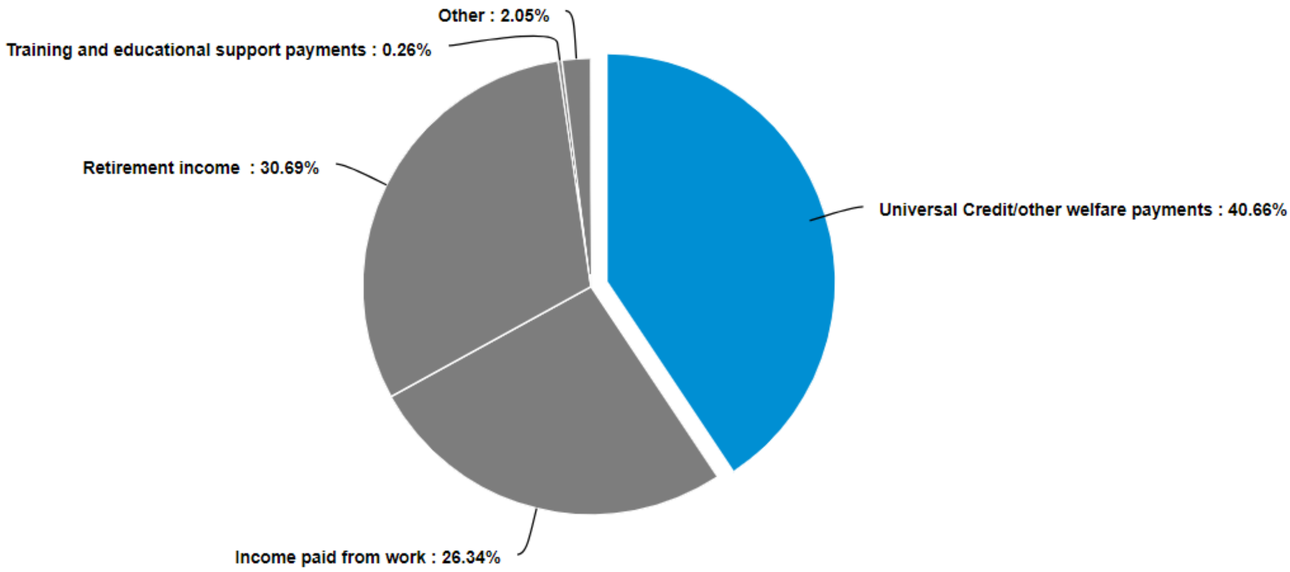
As with our 2023 results, there were notable differences between private renters and social housing renters.



As can be seen, the highest proportion of renters who rely on earned income as their main source of income are in the private rental sector. This has, however, decreased since 2023, where the proportion of those selecting 'income paid from work' as their main source of income was 79%. Interestingly, there was an increase in retirement income, from 2% in 2023 to 19%, correlating with the increase in respondents over the age of 60. Furthermore, there was also an increase in respondents who had UC as their main source of income, from 12% in 2023.

Social renters

There are some notable differences between renters in the social and private sectors. As can be seen in the chart below, social renters are more reliant on Universal Credit as their main source of income. This is consistent with 2023, however, we have seen a slight decline in those who have 'earned income' as their main source of income, from 29% in 2023, to 26% in 2024. We have, however seen a higher rate of retirement income, from 27% in 2023, to 31% in 2024. This correlates with the age range of respondents.



Tenants with protected characteristics

We identified significant differences between protected characteristic groups, particularly when compared to 2023.

Tenants identifying as **Black & minority Ethnic** were as follows:

- 46% income paid from work, vs 68% in 2023.
- 8% Student Income, vs 14% in 2023
- 31% UC/ Benefits vs 14% in 2023

Tenants identifying as having a **disability** were as follows:

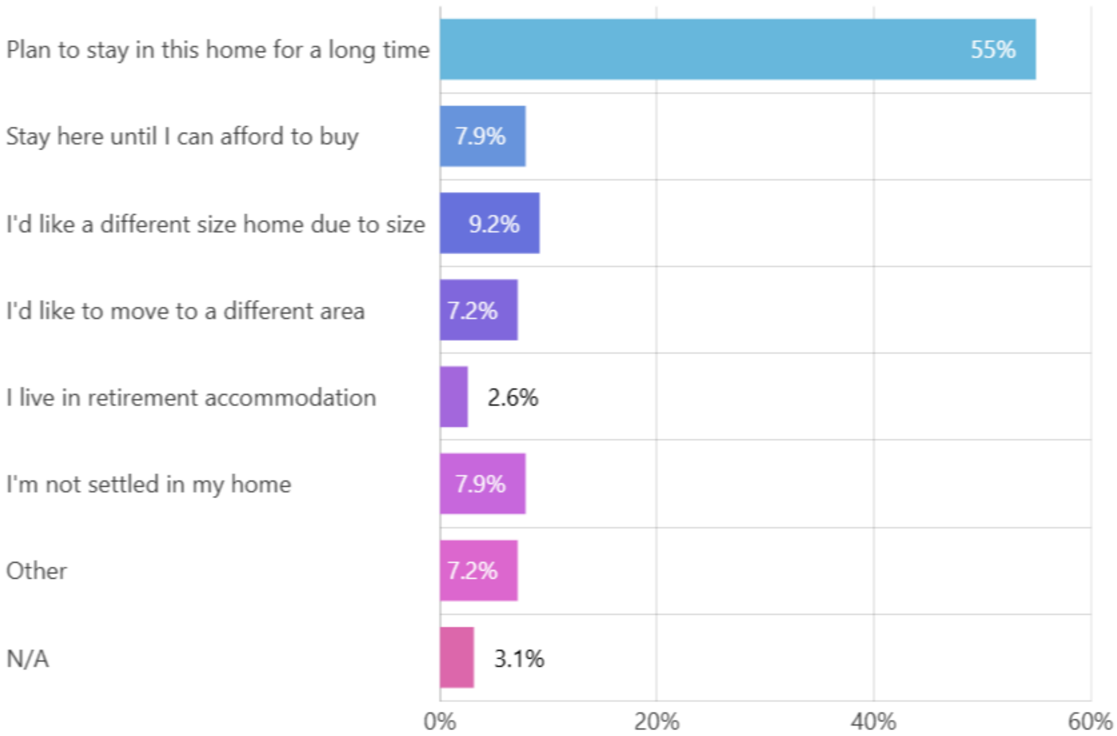
- 18% income paid from work, vs 24% in 2023.
- 62% UC/Benefits, vs 53% in 2023

There is a key point we would like to note:

- When we looked at tenants with protected characteristics within both sectors, we saw a decrease on working income and an increase in Universal Credit

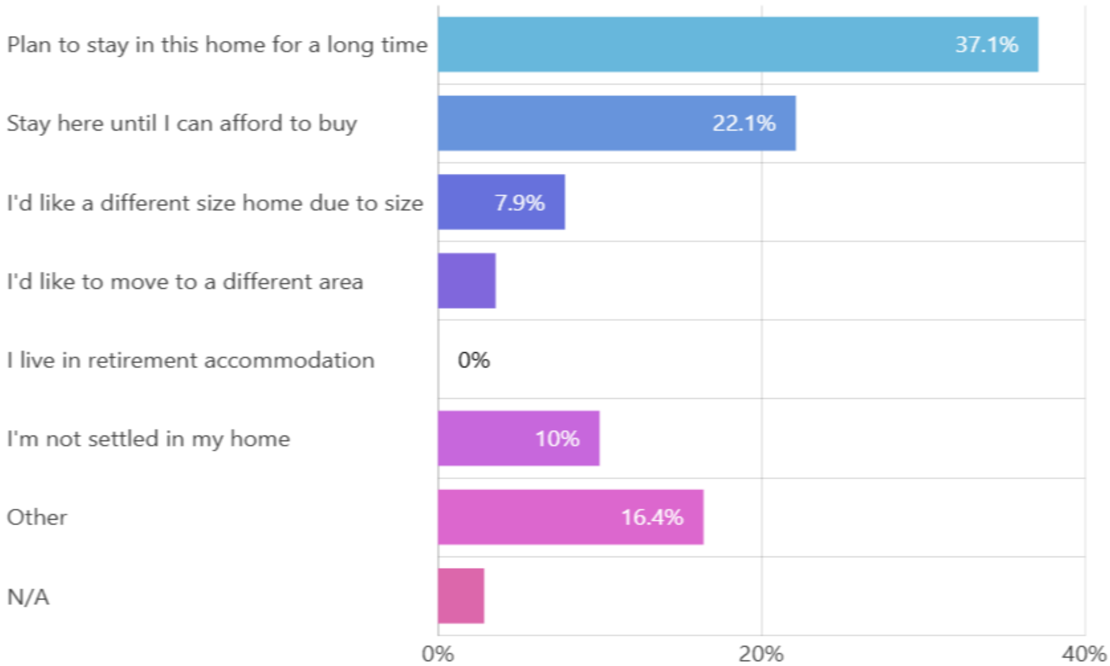
Questions

1) How would you describe your current renting situation? (all renters)



We have seen an increase this year in renters who plan to stay in their home for a long time, from 45% to 57%. We have also seen a decrease in those who want to stay until they can afford to buy, with 18% in 2023 and only 8% this year. All other categories are consistent with 2023.

When we look at Private Renters:



Drawing on the findings from 2023, we have seen a significant reduction in those who say that they wish to stay until they can afford to buy. From 41% in 2023, to 23% in 2024. When exploring this in more depth, the key point was affordability.

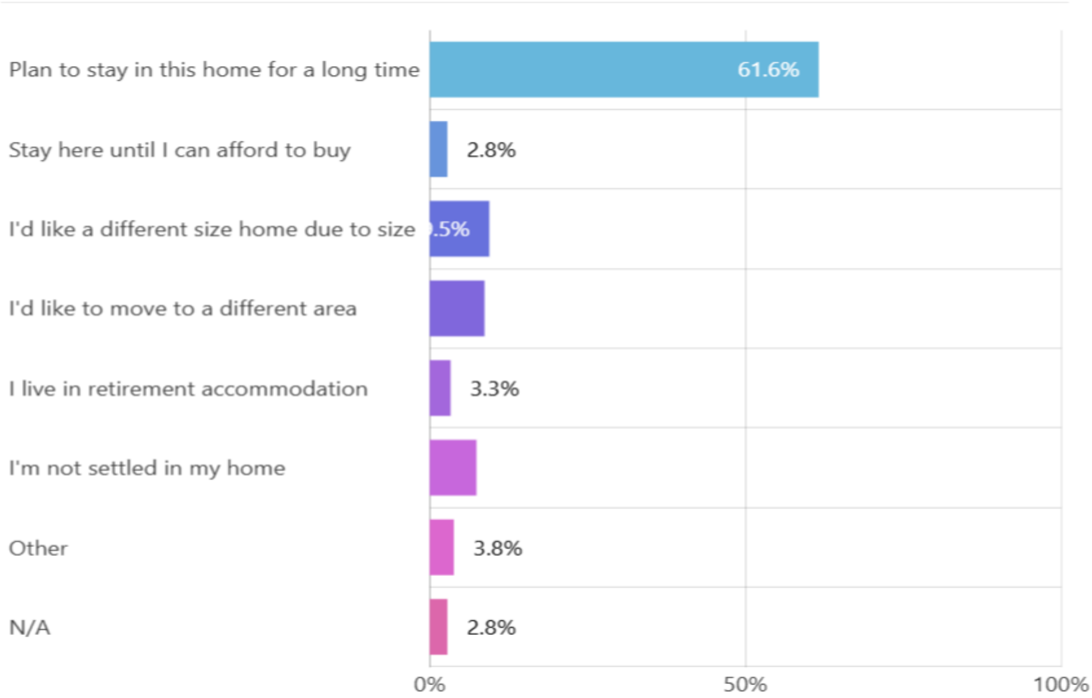
1) Affordability concerns: Renters felt that the cost of rent is too high to enable them to save for a deposit and the additional challenge of the cost of living is meaning they have a double struggle resulting in not being able to save.

In 2023, this was the highest category, which has now changed to 'planning to stay in this home for a long time'.

When comparing with 2023, it is also worth noting that there has been a decrease in the number of renters saying that they would like a different size home due to size or would like to move to a different area.

We have also seen a seen significant increase in those in the private sector who say that they wish to stay in their home for a long time. In 2023, we had 19% in this category and 38% this year. On exploring this, it was clear that this was related to affordability and the cost of moving to a new property or buying a property.

When we look at Social Renters:



Whilst at first glance, similar to private renters, the 'plan to stay in their home for a long time' was the most popular. However, when look at percentage, it is double that of private renters. This has only marginally increased over the past year. The most notable variation between private and social renters was that only 3% of social renters wanted to stay in their property until they could afford to buy, compared with 23% in private.

In 2023, more social renters said that they were 'renting until they could afford to buy'. Those aged 18-30 were amongst the highest number of responders who wanted to stay until they could afford to buy (78%).

Qualitative comments about their rental situation

Within the comments section, several key themes emerged.

1. **Disability and Accessibility Challenges:**

Many respondents are experiencing mobility or health issues that make their current housing situation feel unsuitable. They feel that their needs simply don't match their living space.

> *"Due to my disabilities, I am waiting (nearly six years so far) for a Specially Adapted, Bespoke, Disability adapted bungalow, which fits my needs."*
>
> *"I like my home very much, but parking area is too far away as I'm disabled, I struggle to walk to car."*

2. **Financial Limitations and Affordability Concerns**

Financial constraints are a significant factor, with some individuals feeling "stuck" in their current situation, unable to afford to move to a more suitable place. Renters feel that their every attempt to improve their situation feels hindered by financial limitations.

> *"It's all I can currently afford."*
>
> *"Want to find cheaper rental, but it feels impossible now."*

3. **Health and Safety Concerns**

Some individuals feel the need to move due to serious health concerns or because their current accommodation exacerbate existing health problems.

> *"It's similar to living in a house that constantly leaks – the environment is making things worse rather than providing shelter".*
>
> *"Need to move from flat due to health issue.*
>
> *"Saving up to move due to rising damp and mold."*

4. **Issues with Housing Providers**

There are concerns about the reliability and responsiveness of landlords or housing associations, with some people feeling neglected or left 'in limbo'. They feel that help in inaccessible.

> *"Been here 10 years - not sure what landlords plans are for the future."*
>
> *"Plan to live here forever but not up to standard and have to beg for things to be completed."*

5. **Eviction and Insecurity**

The anxiety of facing eviction or insecure tenancies is evident amongst private renters. There is a nervousness and angst identified.

> *"Just been issued a no-fault eviction, again."*
>
> *"I am going to stay until my landlord sells."*

6. **Desire for Stability and Independence**

Many respondents express a desire for stable, independent, or permanent accommodations, like retirement homes or becoming homeowners. Renters want a place that they know will be their long-term home and that they don't need to worry of it will be taken from them.

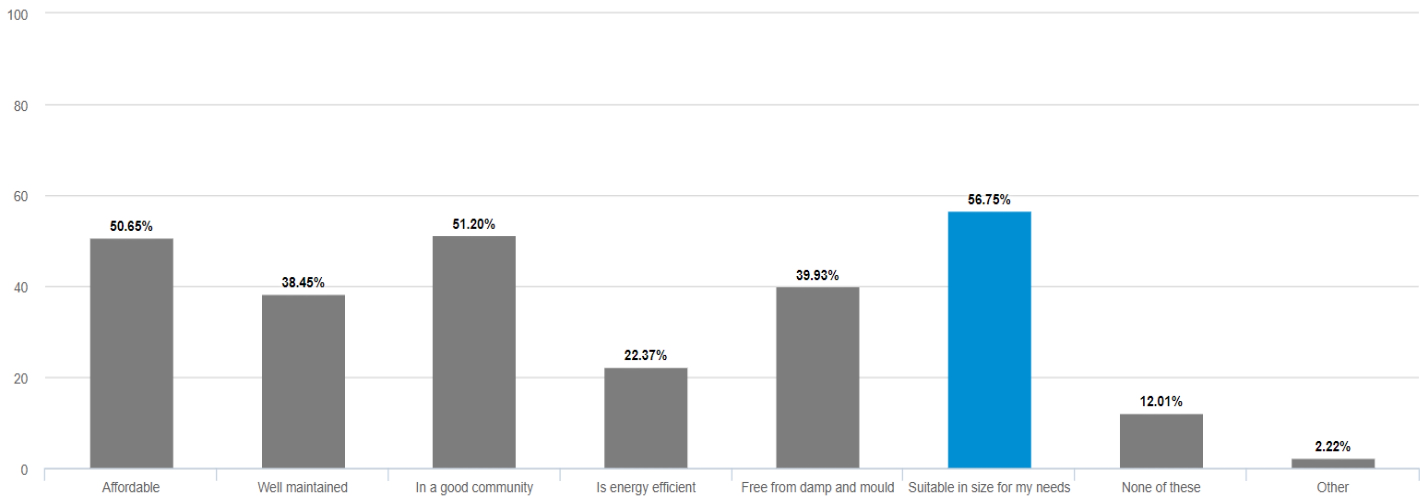
> *"Leaving rented accommodation to be a homeowner is the dream."*

> *"I hope to move to a bungalow from this flat."*

These themes reflect the complex and often interwoven challenges people face with their housing, particularly when health, disability, or financial limitations are involved. Each story speaks to a deep need for security, accessibility, and dignity in housing solutions.

2) Would you say your home is any of the following?

*(Tenants could pick **more than one** answer).*

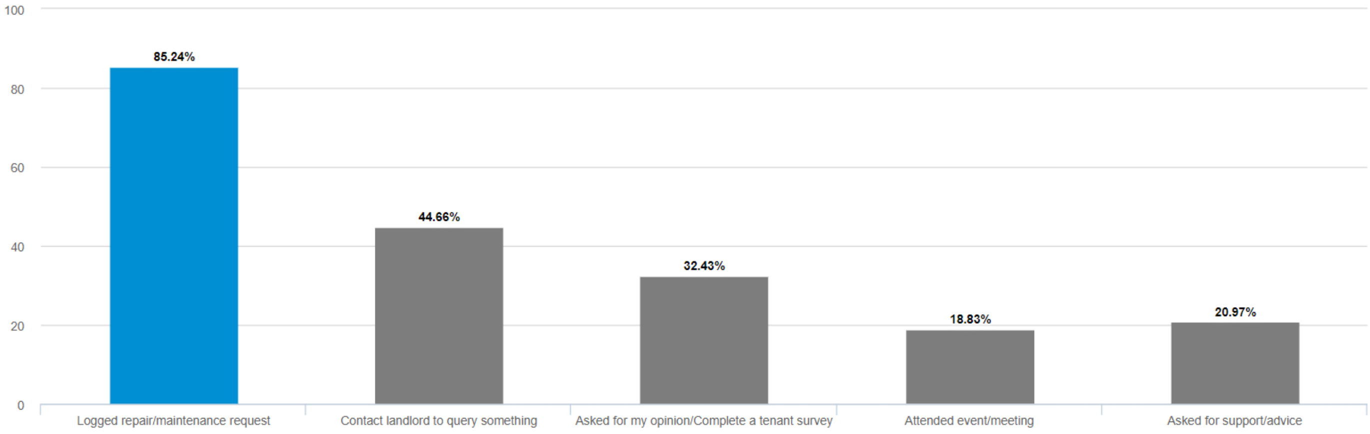


Key findings:

- When drawing on findings from 2023, we immediately see a slight positive increase in all of the responses. Whilst the increase is slight (average of 2.5%), it shows progress.
- We have seen a slight increase in satisfaction since 2023 in those claiming that their property is affordable. However, 49% of respondents still feel their home **isn't affordable** and private renters felt it was less affordable than social renters.
- 52% of social housing felt it was affordable and 49% of private renters felt it was affordable
- Energy efficiency remains the one of the lowest satisfaction categories across both sectors.
- 57% say its suitable in size. This has been consistently the most answered amongst all age groups.
- Living in a *'good community'* was more commonly chosen amongst private renters than social and was also most chosen by Black Asian and Minority Ethnic (BAME) respondents.
- There was a 14% variation amongst all respondents and BAME respondents on Damp and Mould, with 54% of BAME tenants saying their home was free from damp and mould compared lower satisfaction of 40% of all tenants.
  These figures (whilst perception) are still far too high with effectively 60% saying they have some for of damp & mould.

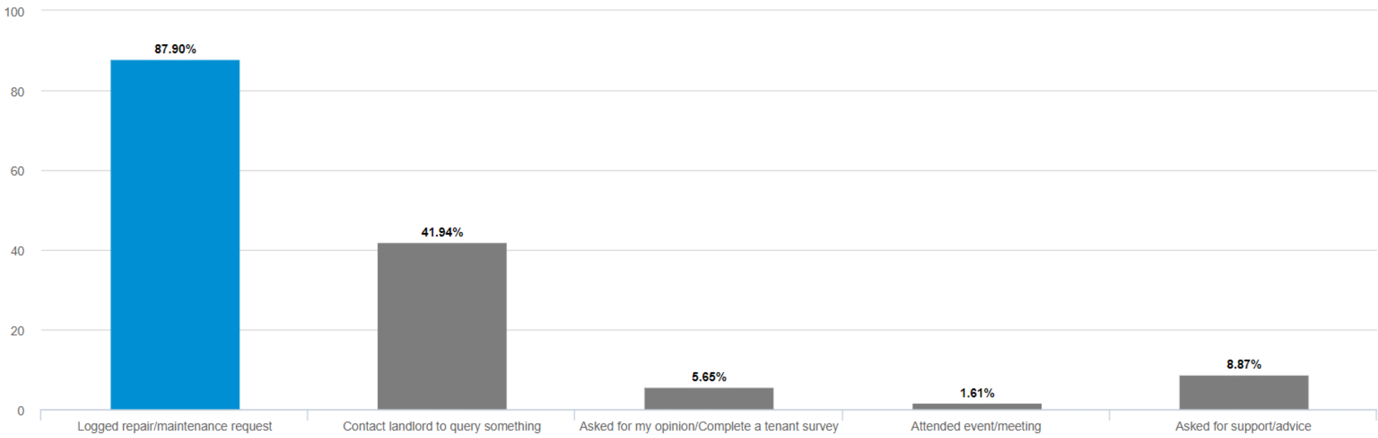
3) In the last year, what interactions have you had with your landlord?

All renters



Note: Similar to 2023, the main tenant & landlord engagement has come from logging a maintenance request. The most notable change from 2023 was that there has been an 8% increase in tenants being asked an opinion or to complete a survey.

Let's look at Private renters



In line with the findings of our 2022 and 2023 Annual surveys, the relationship with private renters and their landlord or agent is much more transactional, in terms of any contact outside of maintenance and queries is minimal.

Note: This year, we added an additional option in about a tenant contacting the landlord for support, so we are unable to draw on annual comparisons.

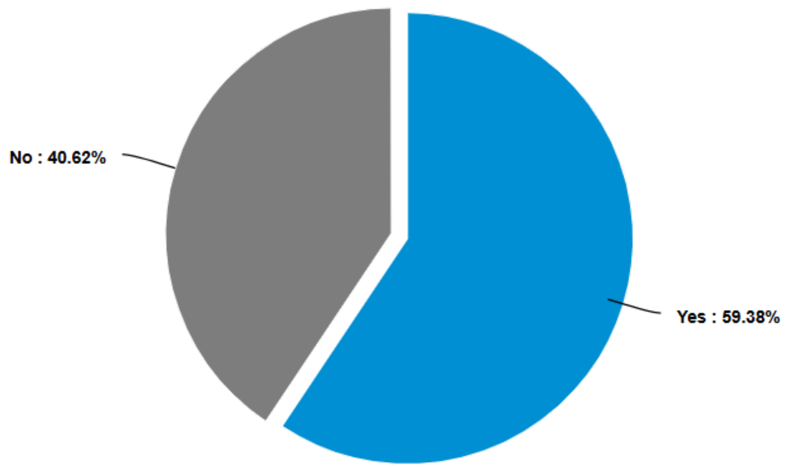
Key findings: There are notable differences between the number of renters reaching out to landlords for support in the social sector (21%) compared to those in the private (9%). Also, the number of renters being asked for opinions or to complete surveys is vastly difference, which is likely to be related to the regulatory requirements of landlords within the social sector. When we looked deeper into the data, we can see that the majority (87%) of the renters living in social housing who had been asked to complete a survey were living in a housing association home.

4) Are you happy with the level of engagement your landlord provides? (all tenures)

Note: This question wasn't asked in the 2023 survey so cannot be compared

At first glance, we see that almost 60% of tenants are happy with the level of engagement that their landlord provides.

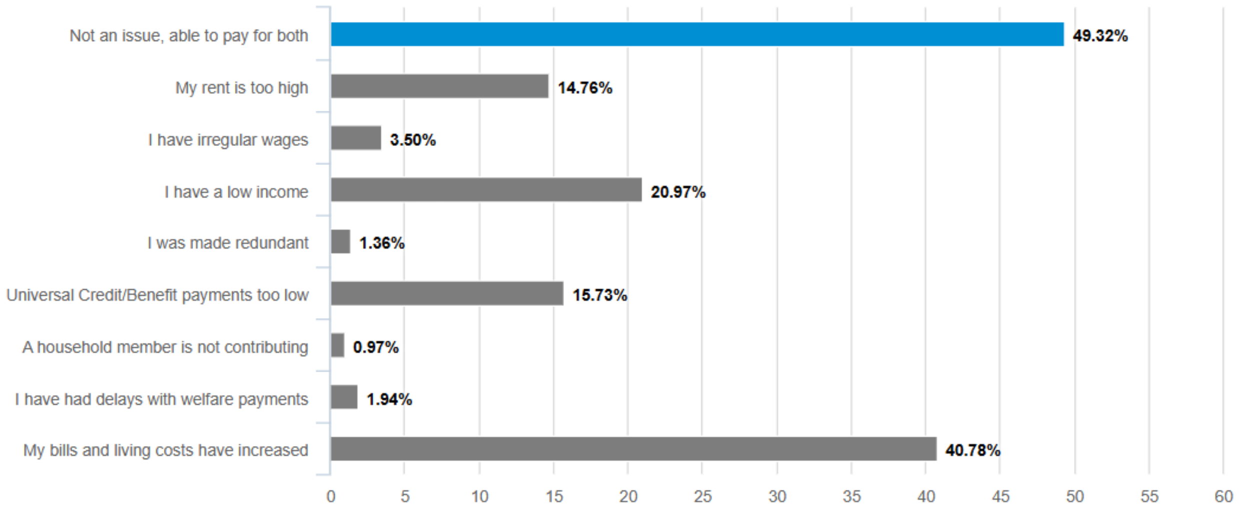
Think Point – is 60% good enough?



Key Findings:

- There were no significant differences between renters in the PRS and social renters re level if engagement.
- Overall, tenants identifying as BAME were happier with the level of engagement from their landlord (63%) compared to overall responders.
- No significant differences amongst PRS renters renting from an agent or directly from their landlord.
- There was a notable variation between age groups with the younger renters being less happy with the level of engagement than older aged renters, wanting more.
  Aged 18-30 (46% yes/ 54% no)
  Aged 60+ (63% yes/ 37% no)

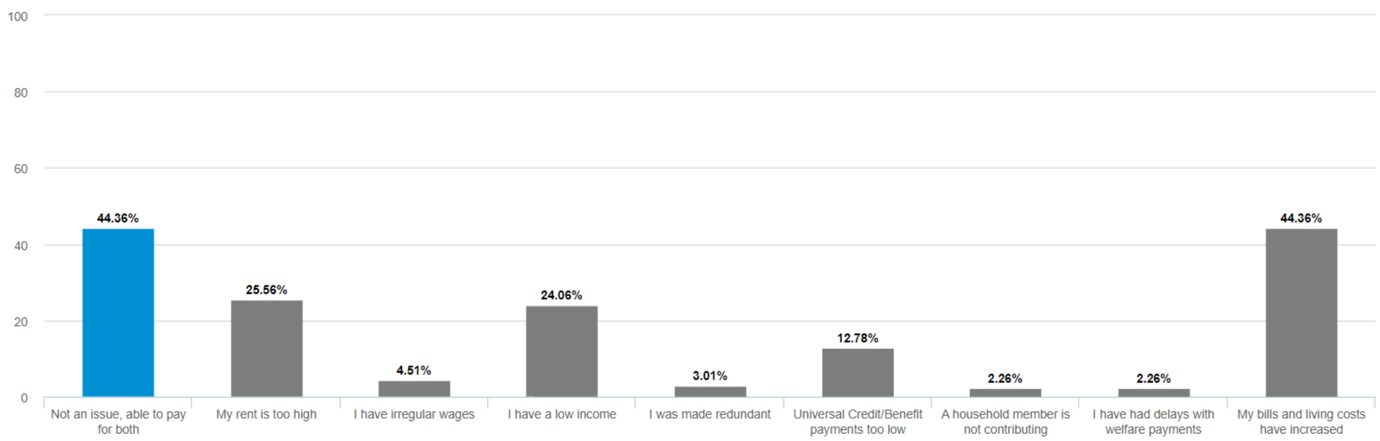
5) If you are struggling to pay rent/bills, what is causing this (click all that apply)



Key Findings:

- At first glance, 'Able to pay' has fallen compared to 2023; 49% of renters felt that they weren't struggling to pay rent or bills compared to 60%.
- 'Rent to high 'as a cause of struggle fpr private renters is double that of social housing tenants
- Following feedback from 2023, we have added '*my bills and living costs have increased'* which is closely following the highest category, with 41%.
- On further analysis, those who felt that paying their rent and bills wasn't an issue, 37% had working income as their main source, 32% were on retirement income and 28% were on Universal Credit.

Private renters



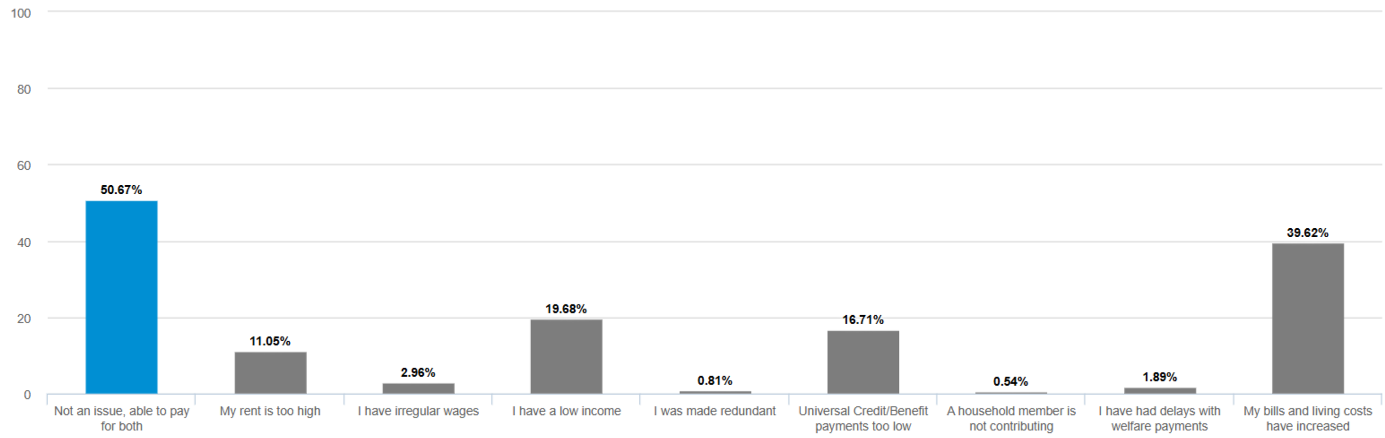
Compared with last year:

There has been a decrease in renters in the PRS stating that paying their rent and bills is *'not an issue, able to pay both',* suggesting that affordability struggles have increased this year (56% in 2023 – 44% in 2024).

We added an additional section within this survey question, that states 'my bills and living costs have increased', and whilst this cannot be compared to 2023, we can see that almost half of private renters rent has increased in 2024, correlating with the decrease in renters feeling paying their rent and bills not being an issue.

We also note an increase in the number of private renters stating that their UC is too low. From 8% in 2023 to 13% in 2024, suggesting that UC is not meeting renters needs.

Social Housing tenants *If you are struggling to pay rent/bills, what is causing this?*



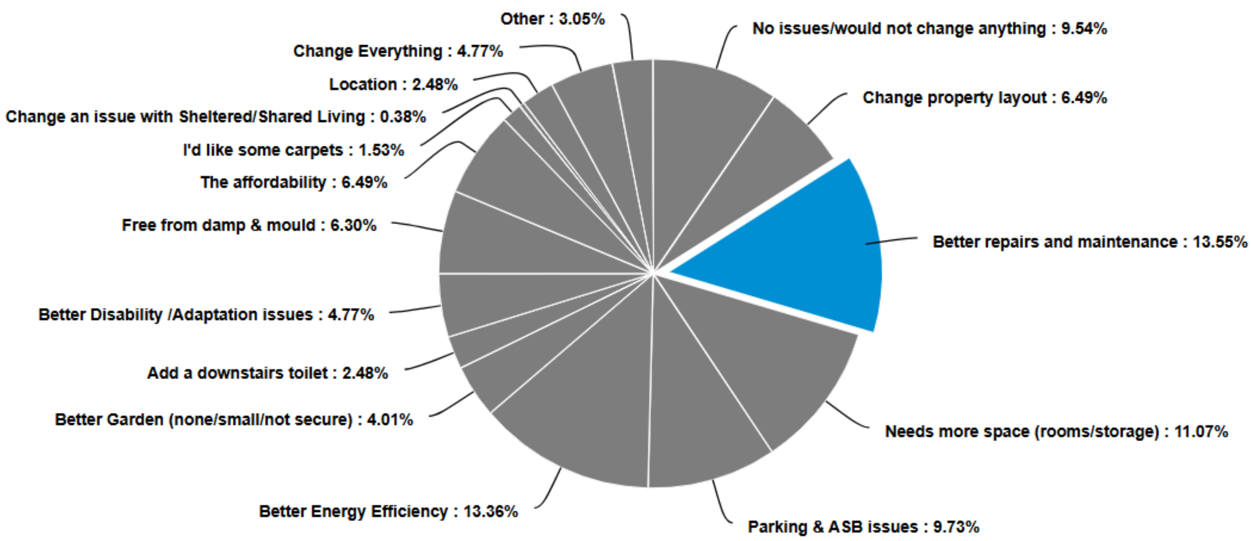
Compared with last year:

- In line with private renters, we have seen a decrease in social renters stating that paying their rent and bills is *'not an issue, able to pay both',* suggesting that affordability struggles have increased this year (62% in 2023 to 51% in 2024).

Overall, at least half of renters in Wales who responded to this survey, are struggling to pay their rent and bills. The largest majority put this down to the fact that their rent has increased, low income and UC being too low.

6) If you could change one thing about your home, what would it be?

This question attempts to get to heart of what really matters to a tenant about their home – the ONE big thing they would love to change about their home. Doesn't mean it's always possible to have that ONE thing fixed.



Consistent with 2023, better repairs and maintenance was the one thing that renters would change.

Top 5 choices:

- Better repairs and maintenance – 14%
- Better energy efficiency – 13%
- Needs more space – 11%.
- Parking and ASB- 10%
- No issues/ would not change a thing – 10%.

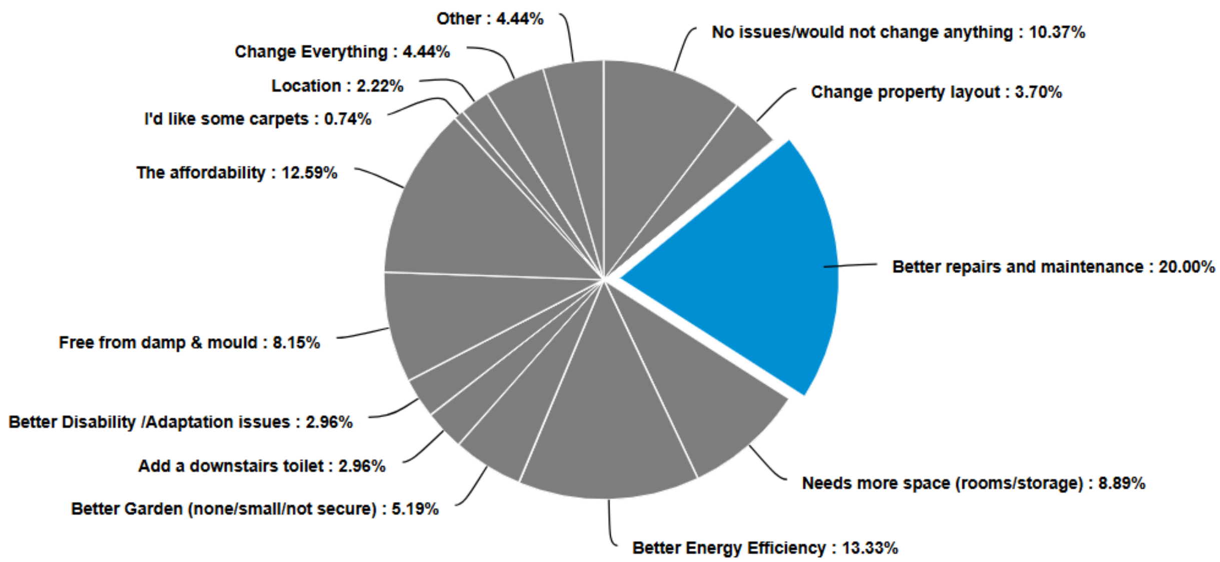
To understand in more depth, we asked for renter comments. Eight key themes emerged which highlight concerns and ambitions.

1. **Landlords and Agencies:**
   Some private renters feel their landlords are taking too much money without offering value. Others mentioned they'd prefer if private landlords managed things directly instead of using letting agencies.
2. **Warmth and Energy Efficiency:**
   Heating and insulation is the 2nd biggest change they would like to see. People are frustrated about poor insulation, draughty windows, and heat escaping their homes.
3. **Freedom at Home:**
   People want more freedom to make their homes feel like their own—being allowed to decorate and keep pets came up as important.

4. **Safety and Accessibility:**
   Security is a concern from those living in flats, with requests for things like self-closing doors to stop unauthorised access. There's also frustration around how disability adaptations are handled, with tenants feeling they should have more say and not just be charged for the adaptations without warning.
5. **Space and Layout:**
   Some tenants are happy overall but wish they had more storage or a bigger garden. Others want changes to the layout, like adding a downstairs toilet.
6. **Warmth and Energy Efficiency:**
   Heating and insulation came up a lot. People are frustrated about poor insulation, draughty windows, and heat escaping their homes.
7. **Repairs and Maintenance:**
   There are concerns about delays in repairs and dealing with issues like damp, mould, and general upkeep.
8. **Homes Suited to Their Needs:**
   A few tenants mentioned needing homes that better match their personal or family needs, with more space for adaptations for disabilities.
9. **Kitchen and Bathroom Improvements:**
   Upgrades to kitchens and bathrooms, including new flooring, are a priority for some.

It's clear that tenants value safe, warm, and personalised homes with responsive landlords.

Private Renters

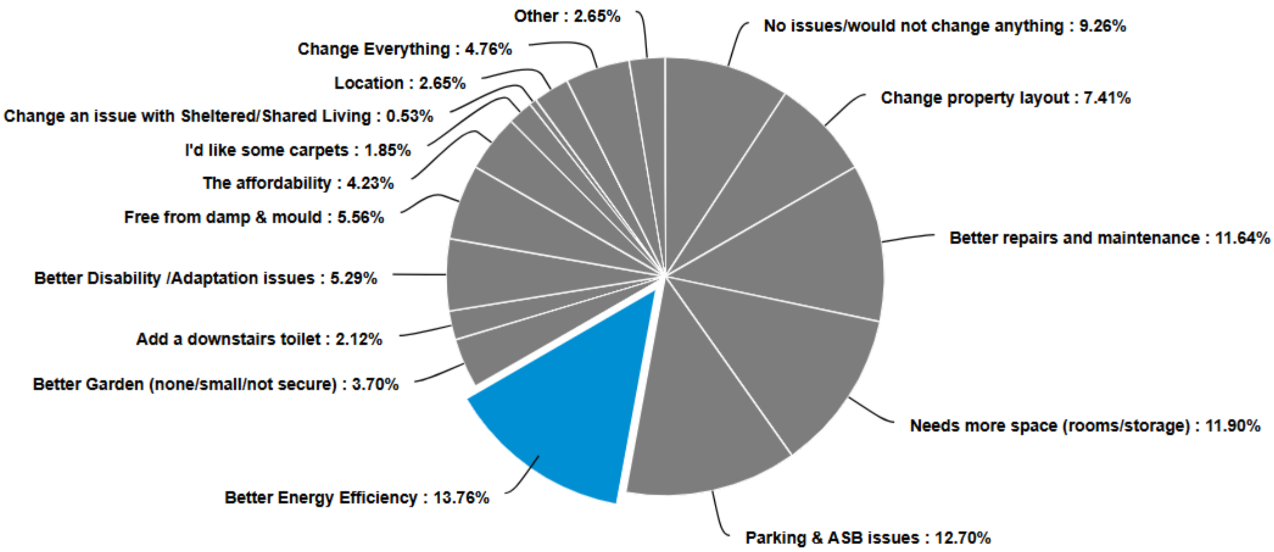


Key Findings:

1. Overall, better repairs and maintenance is consistently the one thing renters would change across both sectors, however, it is more important for those who are renting privately.
2. The issue of Affordability is almost doubled compared to those in the social housing sector.

3. Better adaptations are less important to private renters which is likely to be related to the higher proportion of tenants with a disability living in social housing who responded to this survey.
4. From the qualitative data, we saw that renters felt their landlords are taking too much money without offering value. Mentioning that they'd prefer if landlords managed things directly instead of using letting agencies.

When we filtered for just social housing:



Differences and similarities between social housing and private renters:

Similarities

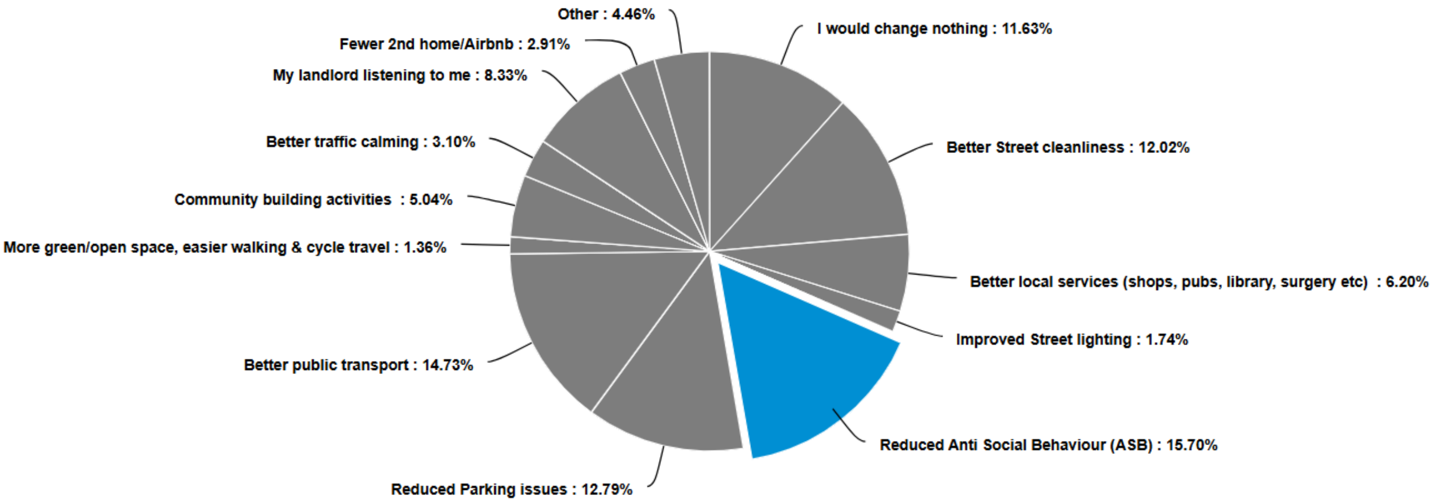
- 'Better energy efficiency' is a key request from social housing (1st) and private renters (2nd)
- 'Need more space' ranks 3rd for social tenants and 5th for private renters.

Differences

- ASB and parking are key concerns for social housing renters, but it doesn't register as a key issue for private renters.
- Affordability is much more of a key issue for private renters (3rd) compared to 10th for private renters.

7) If you could change one thing in your local community, what would it be? (all tenure)

This question attempts to get to heart of what really matters for renters in their COMMUNITY. the ONE big thing they would love to change. We know that it isn't always possible, but it enables housing providers to have that broader understanding.



Overall, we can see that reduced ASB, and better public transport were the two highest categories, closely followed by better street cleanliness. These findings are very similar to 2023, however, there is a slight increase in those selecting ASB as THE key change they want to see.

We asked renters to elaborate on the points, revealing 7 key themes to help with our understanding:

1. Housing and Landlords
- People are worried about the lack of affordable housing and feel that HMOs (houses of multiple occupation) and student lets are disrupting the balance of their communities.
- There's frustration with landlords, with tenants wanting them to listen more, manage issues in the community better, and be more understanding—especially toward those with disabilities.

2. Noise and Traffic
- Traffic noise, especially from busy roads, is a big issue.
- There's a concern about road safety, with calls for more pedestrian crossings in busy areas.

3. Public Transport and Access to Services
- A lot of people feel cut off because of poor public transport. Without a car, they say it's almost impossible to get to shops or services, making life difficult.

4. Fixing Roads and Public Spaces
- Roads with potholes, broken streetlights, and neglected public spaces are a common complaint.
- Overgrown weeds, brambles, and blocked pathways are making the area feel unkempt and hard to navigate.

5. Community Spirit
- There's a real desire for more community connection—people want to feel supported by their neighbours and have a stronger sense of belonging.

- AirBnB/2nd homes have a different impact depending on tenue. Wanting fewer holiday lets are 3 times higher for private renters compared to social housing tenants. Private renters see themselves having it compete in a limited options pool of properties.

6. Local Leadership and Services

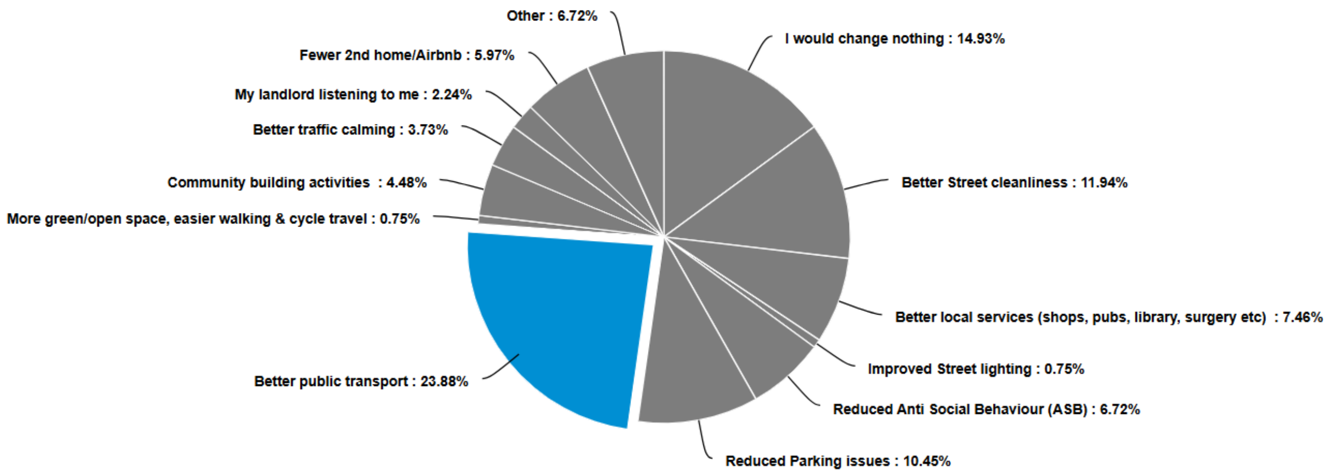
- Some people are frustrated with local councillors, feeling they don't listen to residents or take real action.
- Better services—like more doctors' surgeries, decent shops, and improved amenities—are high on the wish list.

7. Cleaning and Maintenance

- Issues with rubbish collection and unkempt public areas came up a lot. People want their communities to feel cleaner and better looked after.

Overall, renters want safer, cleaner, and more connected communities, with better leadership and services to make life easier. The recurring themes are about being heard, feeling supported, and having the basics—like transport, maintenance, and housing—taken care of properly.

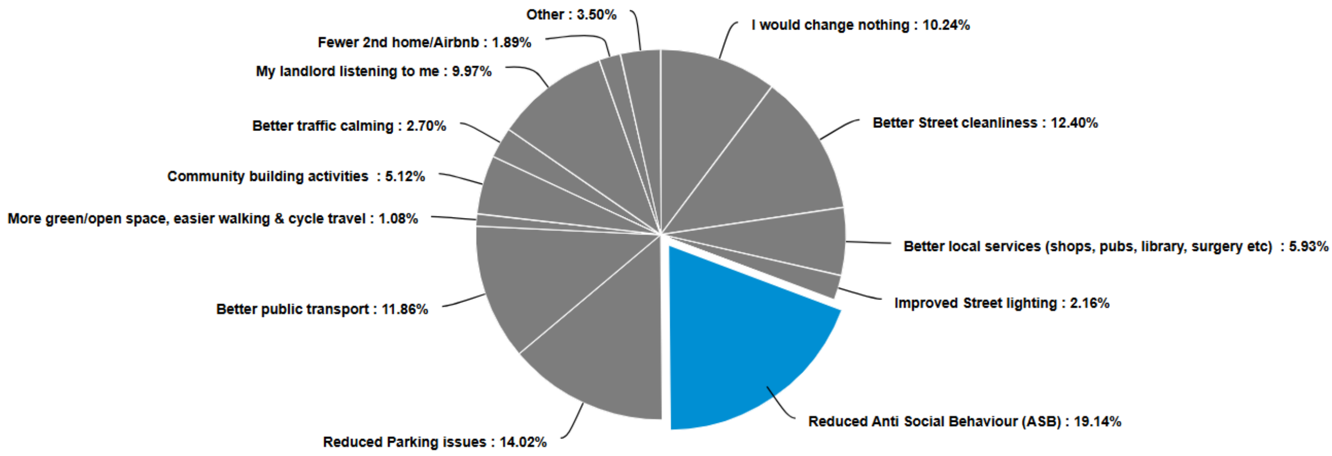
Private Renters



Key Findings:

1. Better public transport was the most important factor for renters within the PRS.
2. Anti-social behaviour was less of a priority for tenants living within the PRS.
3. When looking at the different regions, the highest proportion chose to change nothing in North Wales.
4. Compared with 2023, we have seen a reduction in the better street cleanliness **(18% in 2023 to 12% in 2024)** category, and an increase in the better public transport category, from **14% in 2023 to 24% in 2024**.

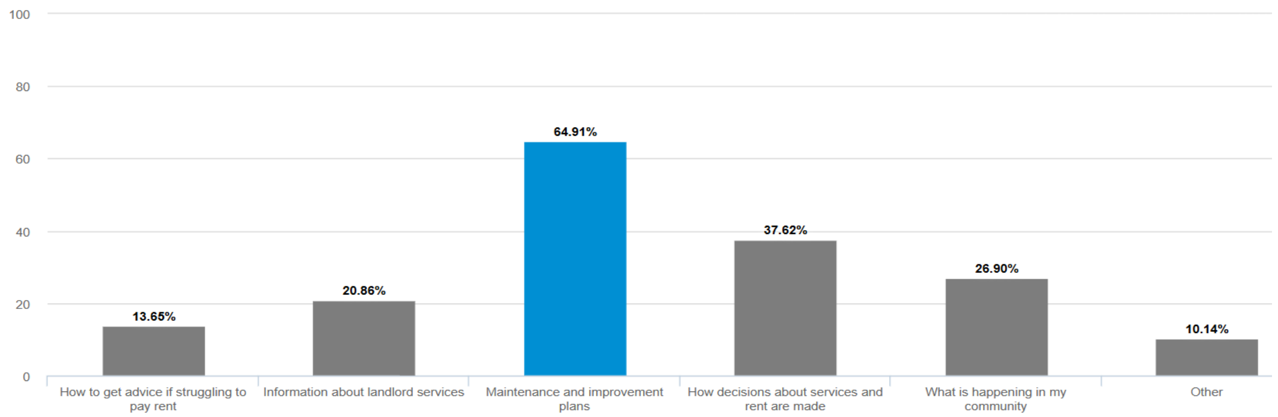
When we filtered for just social housing



Key Findings:

1. Reduced Anti-Social Behaviour was of the highest importance to social housing renters, followed by reduced parking issues and better street cleanliness.
2. There has been a slight increase in the 'reduced ASB' category from 2023, from 15% to 19%.
3. No other notable changes from 2023.

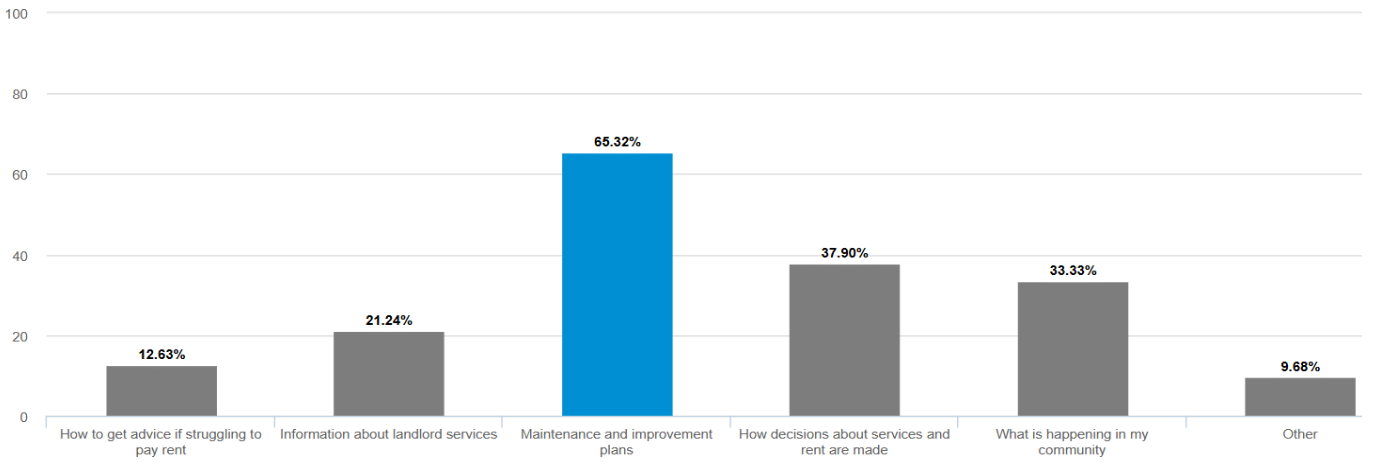
8) What information from your landlord would be most useful?



Renters are keen to understand what their landlords' intentions are around maintenance and improvement plans. Similar to 2023, the key category in terms of what information renters would find most useful from their landlord.

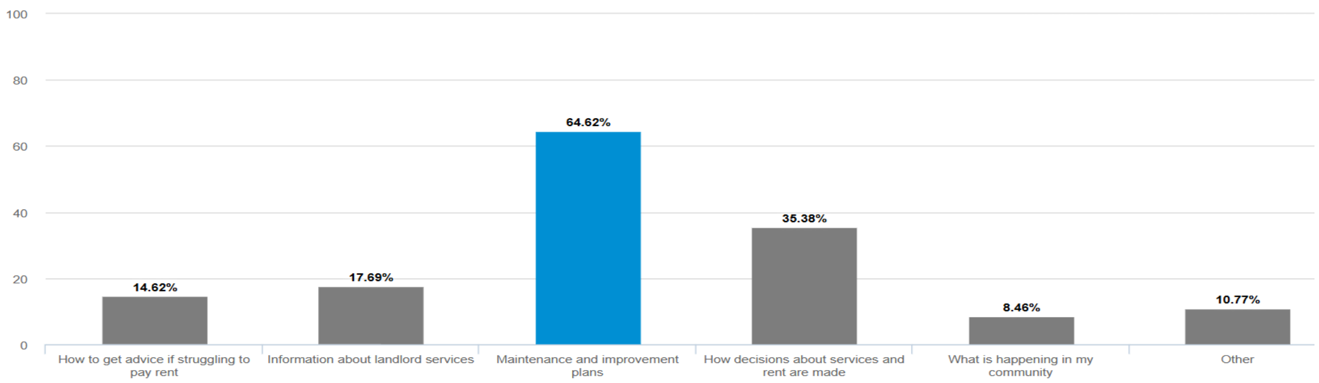
In addition to this, renters would like more information on how decisions are made about their rent and service charges. This has significantly increased from 2023 where 26% of renters wanted more information about this, to 38% this year.

Social Renters only



Having more information about maintenance and improvement plans is most important for social renters, which is consistent with 2023. In 2023, 26% of social renters wanted more information about how decisions were made around their rents and service charges, and this year, it has increased to 38%.

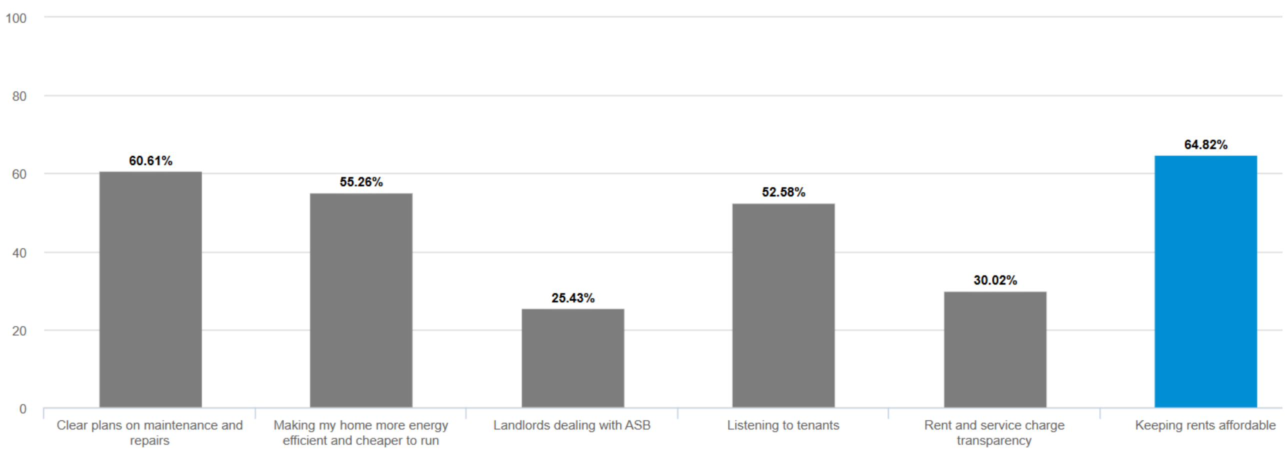
Private renters only



We saw consistency amongst both sectors in terms of what was most important. The only notable difference between responses from private renters than social renters regarding more information about what is happening in the community.

Private renters have far less interesting in hearing form their landlord on this subject.

9) What do you believe your landlord priorities should be?



Keeping rents affordable is the main category for renters and is consistent with previous years, however, we have seen an increase this year. From 58% in 2023, to 65%. This is, in fact, consistent across every category, as can be seen in the chart below.

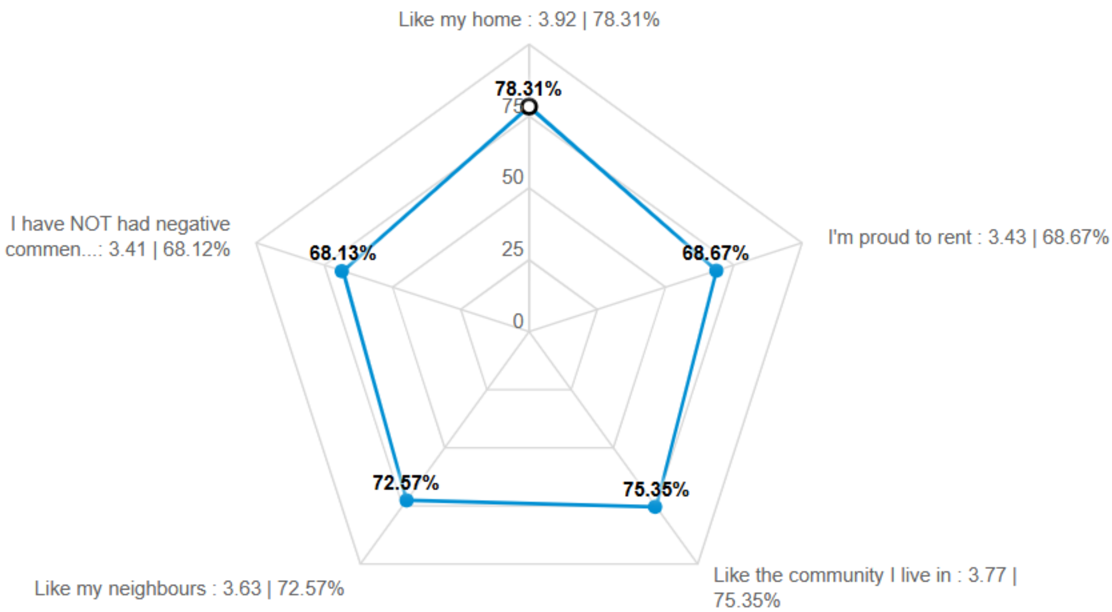
Comparison analysis:

	2023	2024
Listening to tenants	44%	53%
Landlords dealing with ASB	15%	25%
Rent and service charge transparency	20%	30%
Keeping rents affordable	58%	65%
Clear maintenance plans	41%	61%
Making homes more energy efficient	49%	55%

As we can see, there is a shift in what renters believe their landlord priorities should be since 2023. Whilst all the increases are significant, the most notable shift is the need for clear maintenance plans.

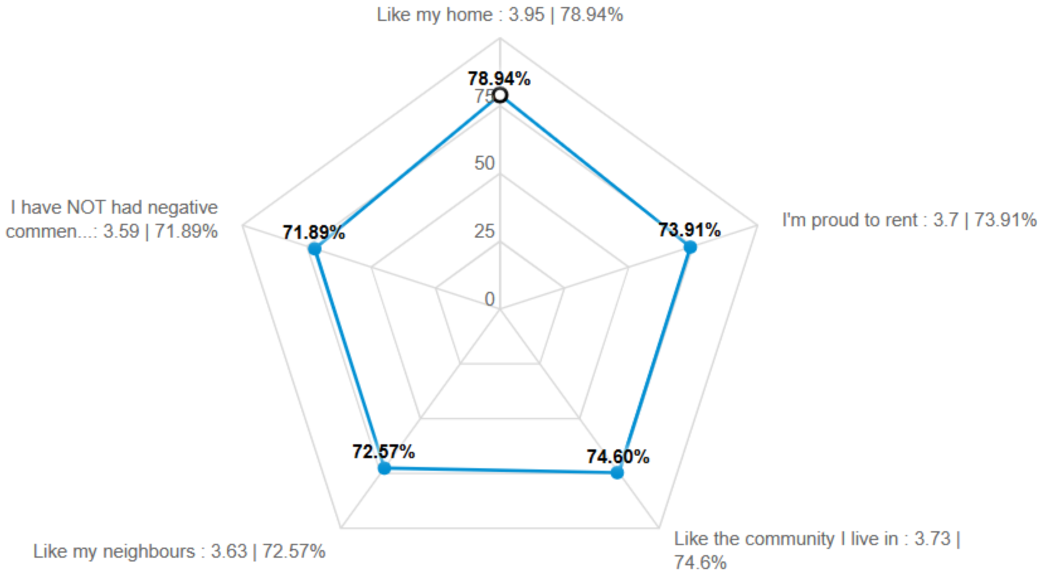
10) How do renters feel about their home and community? Out of 5 stars, can you rate the following statements?

Context – this question is designed to explore some of the basic feelings around renting; how they felt about their home, community and how they felt as a renter. Have they received negative comments etc. We are then able to track year on year.



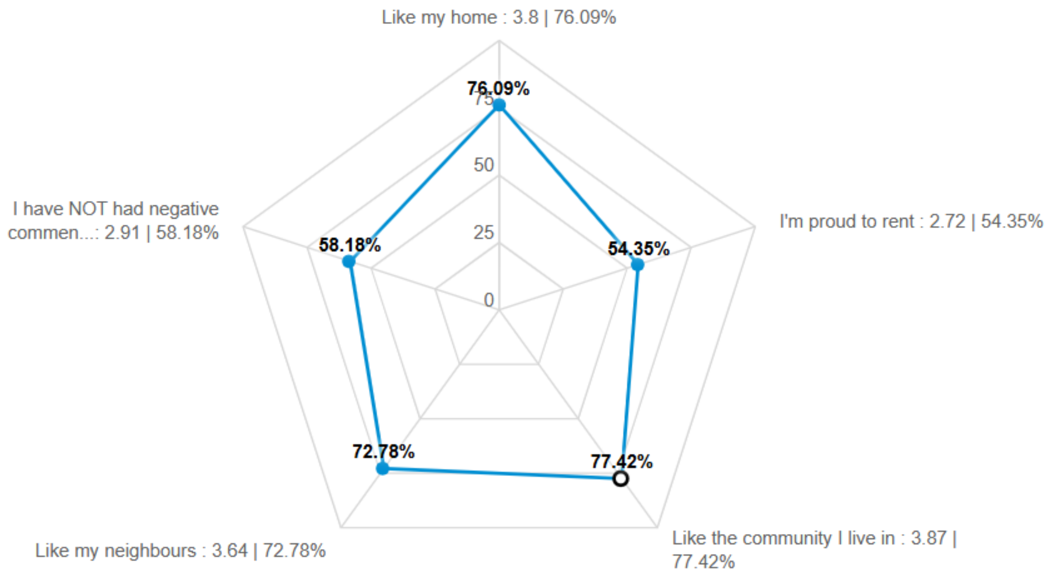
Key headline for all renters:
Most respondents feel positively about their homes (78% positive), same for their community (75%) and neighbours (73%). Where satisfaction starts dropping is when asked about are they proud to renting and receiving negative comments about being a renter. (68% each). This cross-tenure dip lower levels is driven by private renters -see next section.

When we look at social housing tenants



Social housing tenants are slightly happier in their home than all renters, are higher scoring in proud to rent and do not receive as many negative comments about renting.

When we look at PRS housing tenants



When it comes to private renters there are 2 clear differences to social housing renters. When it comes to 'proud to rent' the levels of satisfaction are much lower (54%). The same applies about 'not receiving negative comments about being a renter' (58%). The comment section indicate a 'private renters' guilt' where they are a sense of failure not being able buy a home and the associated comments they get from friends and famaily as a result.

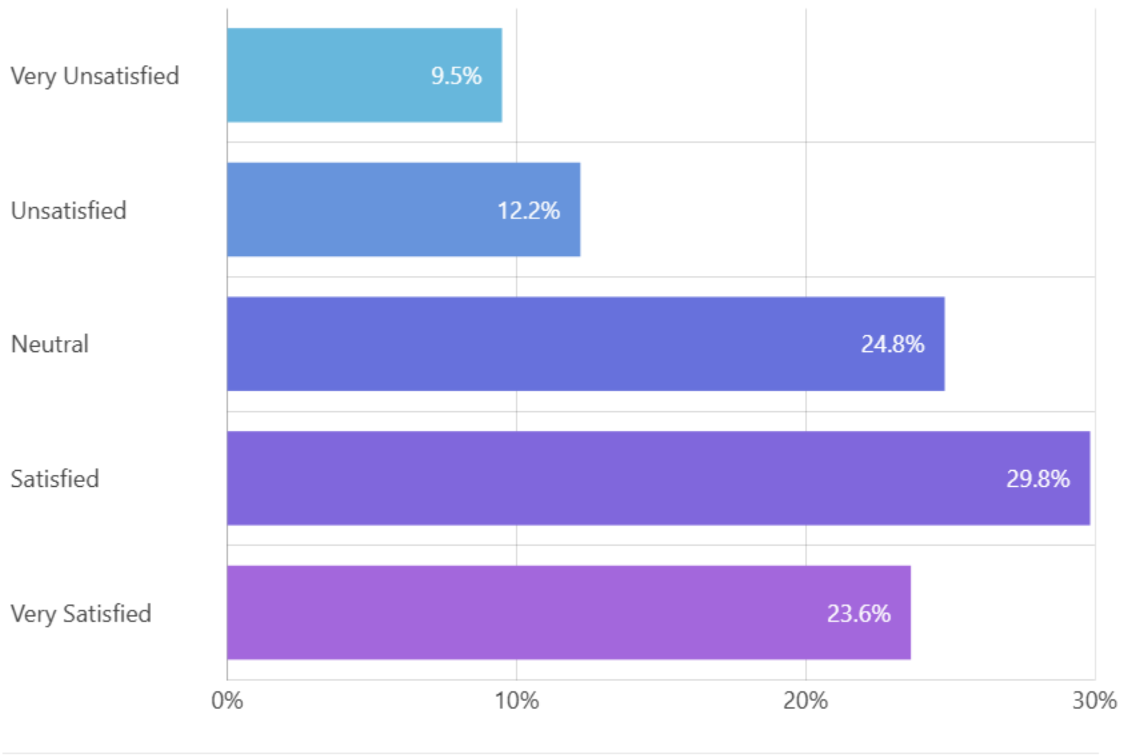
Changes since last year

On nearly every measure, general satisfaction has improved across social and private renters.

Anything of note when we filter on different characteristics:

- Young people are far less satisfied on almost every measure.
- The only exception is under 30s who rent privately who have the highest level of satisfaction with their community and neighbours. On everything else 'proud to rent', 'receiving negative comments about renting' etc they have the lowest satisfaction by a considerable margin.
- Tenants who considered themselves black or minority ethnic, had slightly lower levels of satisfaction across the measures with one notable divergence. Whilst they strongly liked the community they live in; they scored one of the lowest satisfactions for 'I like my neighbours'.

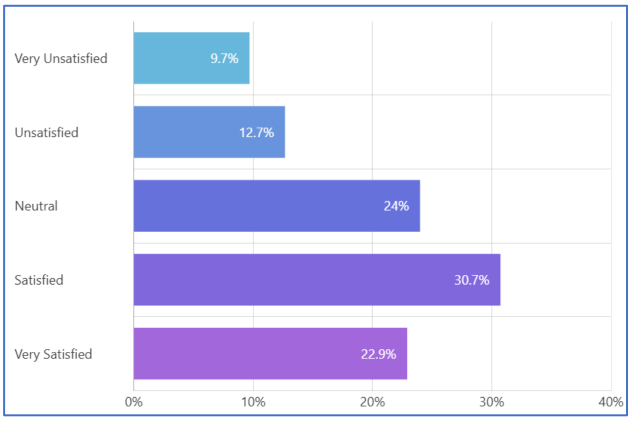
11) Final question: How satisfied are you with your landlord?:



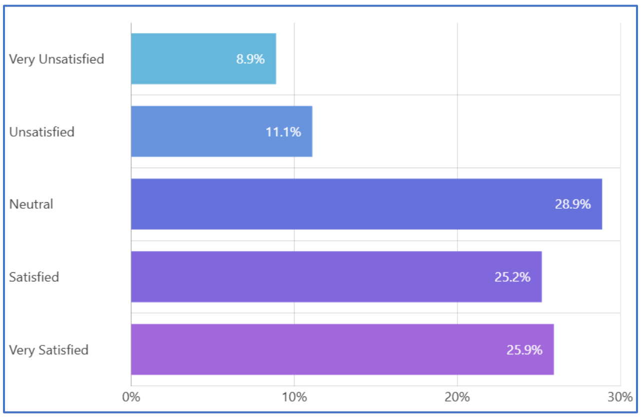
Findings:

- Across tenues overall satisfaction levels are good/neutral with 25% unhappy.
- PRS renters are much more neutral in their satisfaction compared to social housing.
- Tenants from Black or Minority Ethnic background were roughly in line with overall satisfaction levels but when it came to social housing only, they were slightly more neutral than other social housing.

Social only



PRS only



Thank you for reading this Tenant Pulse Report by TPAS Cymru.

Tenant voice is vital in shaping better housing services.

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 the Welsh Government for part-funding TPAS Cymru as an organisation and Wales & West for the year-round lead sponsorship.

About TPAS Cymru

TPAS Cymru has supported tenants and landlords in Wales for over 35 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.

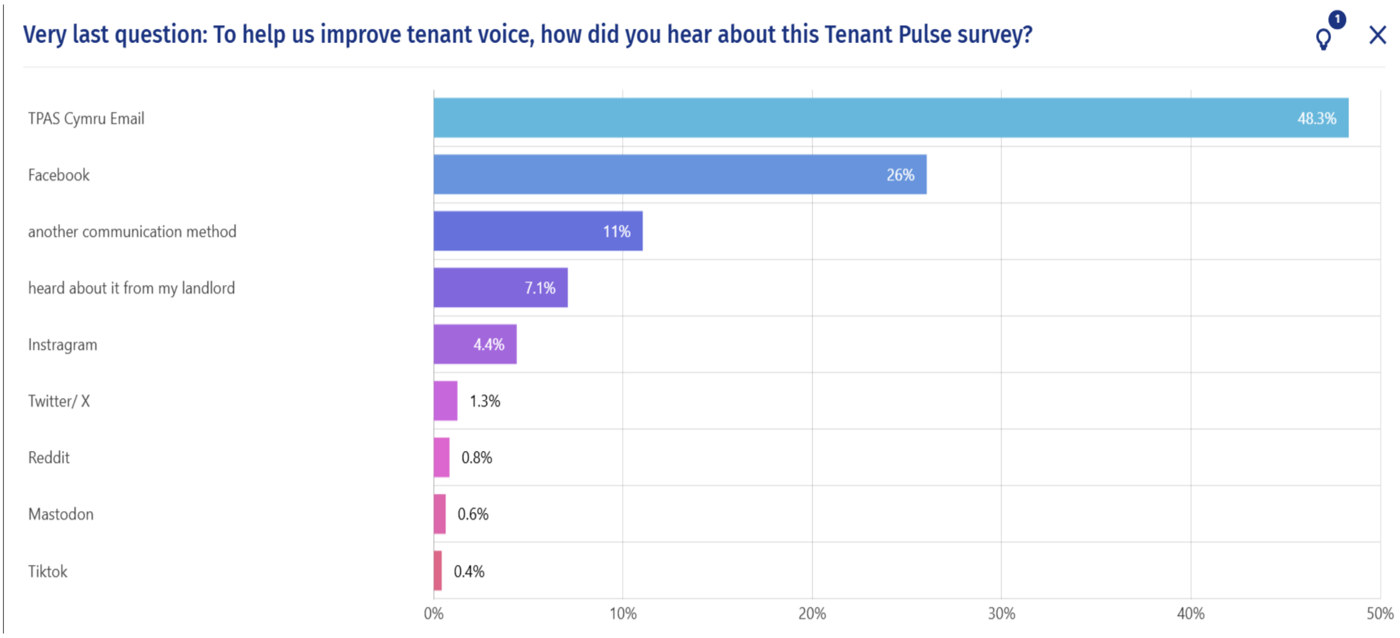
Tenant Voice Sponsor

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

To meet to discuss the points raised, please contact: Elizabeth Taylor, Policy lead, TPAS Cymru elizabeth@tpas.cymru.

Appendix A

We asked how people heard of this Pulse.



Notes:

- Email includes the mailing listing for people signed up to Pulse.
- Facebook includes paid adverts

Where did private renters hear about this Pulse?