



TENANT VOICE ON AFFORDABLE WARMTH & ENERGY EFFICIENCY

EXECUTIVE SUMMARY

2025

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Message From David



David Wilton
Chief Exec, TPAS Cymru



In the face of climate change misinformation, we must stay focused on what truly matters—affordable warmth. With 70% of tenants struggling to heat their homes and most properties below EPC band C, inaction isn't an option. We need to upgrade our housing stock, boost energy efficiency, and make a real difference in people's lives.

Overview

Wales is on a path to achieving Net Zero by 2050, with a strong emphasis on creating energy-efficient homes and ensuring affordable warmth for all tenants. For many tenants, the challenge is not about reducing carbon emissions—it's about having a warm, comfortable, and cost-effective home that meets their needs.

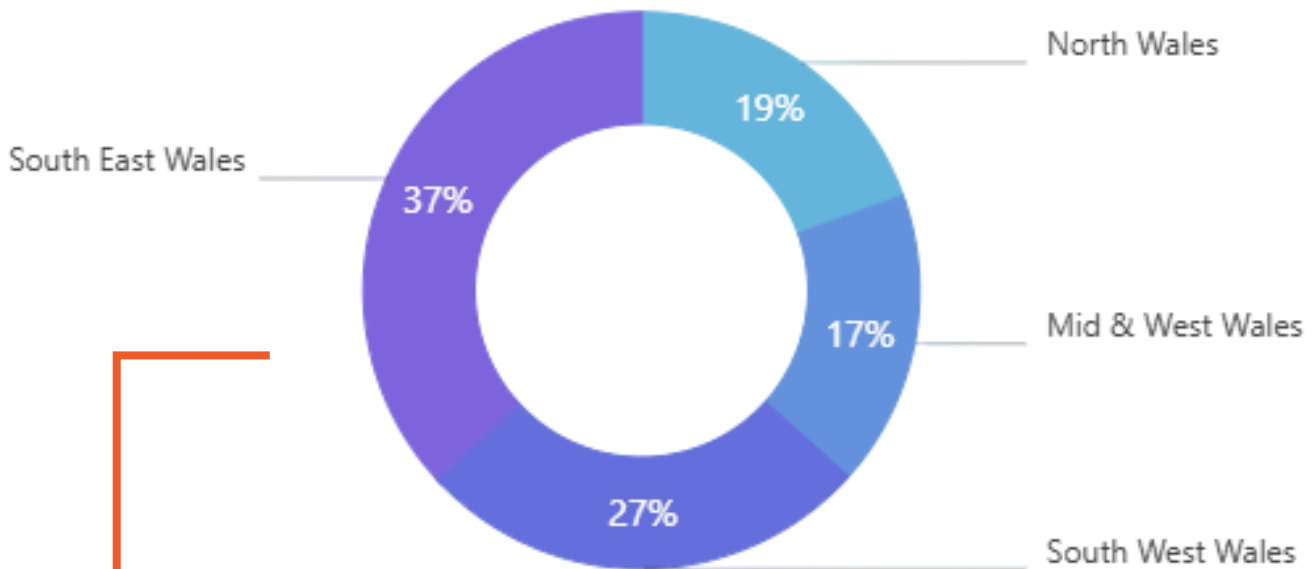
"We can't afford to heat our homes properly, and when we do, the heat escapes through old windows."
— Tenant comment from the survey

Decarbonisation policies are transforming housing across Wales, with initiatives like the Optimised Retrofit Programme and Welsh Housing Quality Standard aiming to improve energy efficiency. However, for tenants, the key question is: Are these changes making a real difference in their daily lives?

This report brings tenant voices to the forefront, exploring their experiences and concerns

Where are the respondents from?

Representation from all around Wales



01

Responses by Region

As in previous surveys and in line with overall housing stock distribution in Wales, the highest number of responses came from South East Wales (37%) and South West Wales (26%).

In terms of age distribution, the youngest respondents—those under 45—were primarily from South East Wales.

02

Responses by Age

The age breakdown of respondents shows a strong representation from older demographics, largely driven by social housing tenants. In contrast, private renters were more evenly distributed across age groups. However, there was an improvement compared to last year, with responses from the 30-45 age group increasing by 3% and the 18-30 age group by 5%.

03

Type of Tenancy

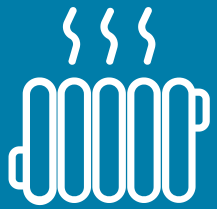
This year, we had 22% responses from tenants in Local Authority, Housing Association tenants 62%. Meanwhile, 12% of respondents were from the Private Residential Sector (PRS).

03

KEY FINDINGS

A QUICK GLIMPSE TO WHAT TENANTS SAID

Heating affordability is at a crisis level, with 70% of tenants reporting they are struggling to afford their heating costs.



Unlike last year, where older renters (60+) were most affected, this year's data shows a shift – younger tenants (18-45) and BAME renters (83%) now face the highest levels of unaffordability. This highlights a growing financial burden on these groups.

21%

EPC awareness has declined from 29% to 21%. The sharpest decline was among 18-30-year-olds (from 43% to just 14%)

Most tenants accurately perceive their home's EPC rating, but some are misinformed.

82%

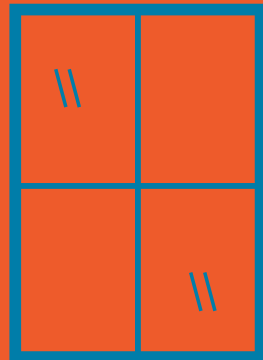
correctly identified their EPC, while 14% overestimated it (believing their home was more efficient than it is) and 4% underestimated it.



The transition from gas to electric heating is a major concern, with tenants worried about higher costs, power outages, and a lack of choice – especially in social housing, where many feel excluded from decision-making.



Windows and insulation remain a major concern for tenants. Many reported draughts, heat loss, and outdated, poorly sealed windows as significant issues. Tenant feedback repeatedly pointed to structural inefficiencies – not just heating costs – as key factors keeping homes cold and unaffordable to heat.



No rent hikes for inefficient homes

81%

of tenants (and 97% of private renters) say landlords should not raise rent on homes rated EPC E or lower until those homes are improved. This highlights the expectation that landlords take responsibility for making homes more energy-efficient before increasing costs for tenants.



KEY FINDINGS

A QUICK GLIMPSE TO WHAT TENANTS SAID



Scepticism about rent increases for energy-efficient homes

While improving energy efficiency is a priority, only 27% of tenants support paying higher rent for homes with better EPC ratings. Many remain unconvinced that any energy bill savings would outweigh the increased rent, reflecting broader concerns about affordability and trust in the rental market.

Tenants are not seeing clear financial savings

after energy efficiency improvements. Only 18% reported lower energy bills, while 52% saw no difference, and 30% were unsure. Older renters (60+) and BAME respondents (25%) reported the highest savings, suggesting a need for clearer communication on the long-term cost benefits of energy efficiency upgrades.

Note: Due to the price disparity between gas and electricity, immediate savings may not always be evident. Additionally, unit costs and standing charges for electricity can further impact overall affordability, making it harder for tenants to see direct financial benefits.

Lack of choice

While EPC ratings can influence affordability and long-term energy costs, many tenants—particularly in social housing have limited choices when selecting a home. Responses highlight housing shortages, affordability constraints, and the risk of homelessness often outweighs energy efficiency concerns. As one tenant said..

“Choice isn't an option when you are faced with homelessness.”

RECOMMENDATIONS

Co-design

Landlords and tenants should work together to create a roadmap for communicating about WHQS, Net Zero, affordable warmth. This plan can be built on the best practices from within and outside the sector.



Shift focus

Net Zero policies should not just aim for efficiency improvements but ensure tenants experience tangible benefits in warmth, comfort, and affordability. This includes rent stabilisation, direct cost relief, and prioritising upgrades that actually lower bills.



Partnerships

Partnerships are needed with responsible organisations to deliver comprehensive technical support and clear guidance to tenants regarding the installation and advantages of smart meters and other energy-efficient technologies.

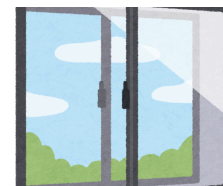
Create Opportunities

Organise regular workshops or seminars that focus on practical aspects of affordable warmth. Additionally, create opportunities for tenants and staff to learn more about the forthcoming challenges in decarbonising housing.



Structural Issues

Tenant concerns about heat loss due to outdated windows and poor insulation show that heating system upgrades alone are not enough. Landlords should prioritise structural improvements alongside efficiency measures to ensure homes retain heat effectively.



EPC Awareness

Given the steep decline in EPC awareness (especially among younger renters), housing providers must ensure that EPC ratings and their financial impact are clearly communicated at the point of rental. Policies should encourage landlords to display EPC ratings prominently and provide guidance on expected heating costs.