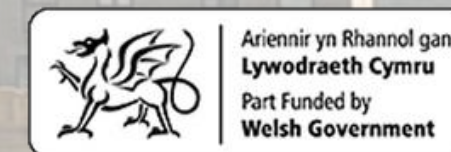




TENANT PULSE

FINDINGS

ENERGY EFFICIENCY & AFFORDABLE WARMTH '25

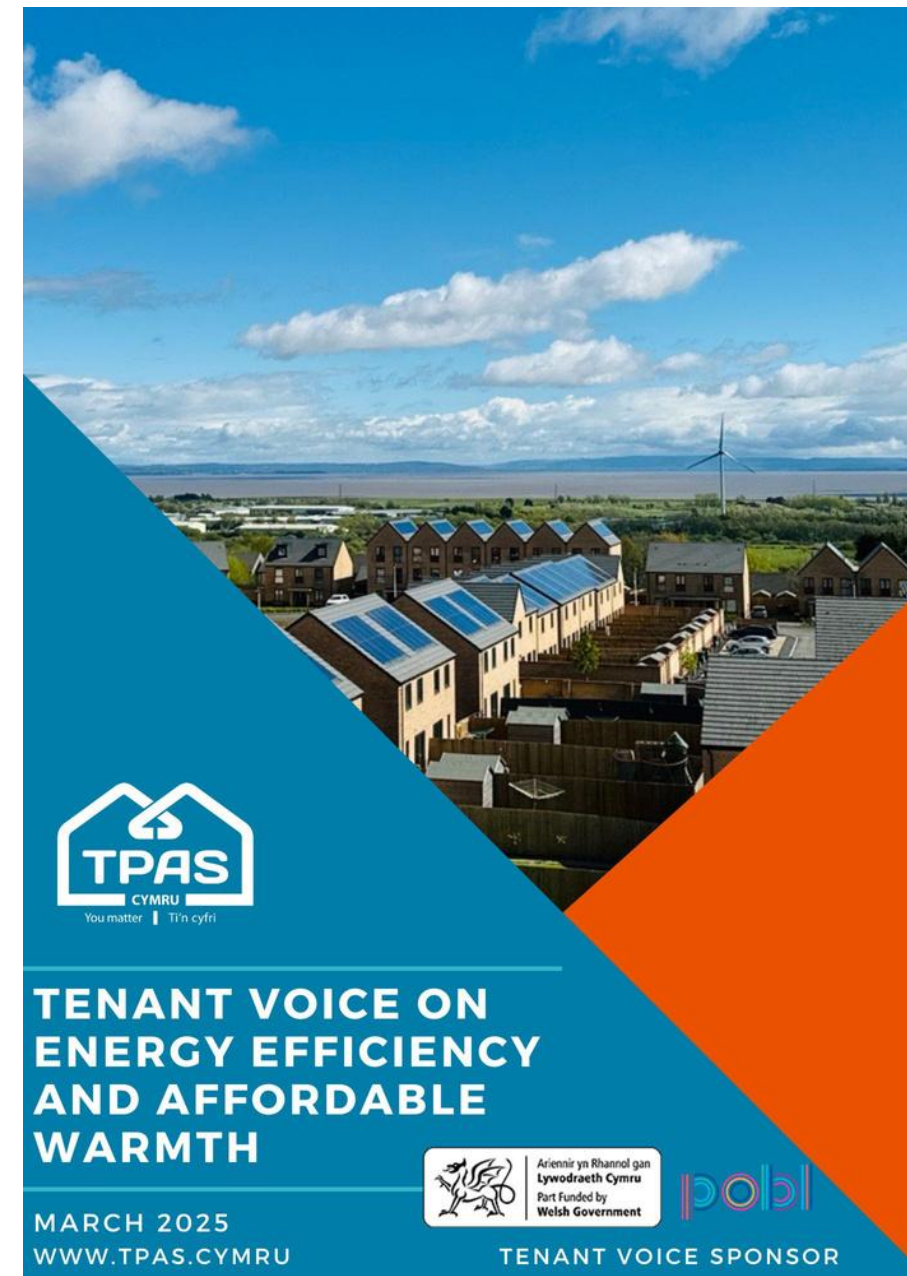


TENANT VOICE SPONSOR



ABOUT TENANT PULSE

- National platform for Wales that enable tenants and renters to provide accounts of their experiences.
- Annual surveys, topical surveys, specific audience surveys, short surveys.
- Database that has 1500+ tenants across tenures





THE TPAG

The Tenant Pulse Advisory Group – TPAG is made up of 16 PRS tenants and 100 Social Housing tenants from across Wales.

The group is diverse, aged between 18–65+ coming from different socio – economic background. (representative of 22 LAs)

We also took help from TPAG to review and provide feedback on Tenant Pulse before we launched it.





THE WINNERS!

Mr Richard – HA tenant, Cardiff

L Martin – LA tenant, South West Wales

Ms Jones – Private renter, North Wales



+ Extra Focus Group Prize

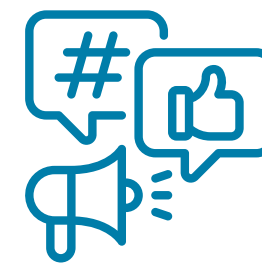
Ms McCarroll – LA tenant, Wrexham



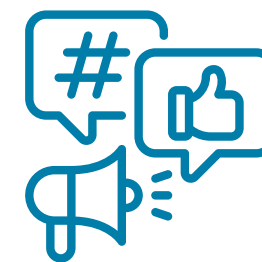


HOW DID WE PROMOTE?

-  The survey is sent to tenants who have signed up to our Tenant Pulse database.
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-  We sent it to social landlords and tenant group to promote.



It is promoted on all TPAS Cymru social media accounts – X, Facebook, LinkedIn, Instagram, TikTok.



Meta (Facebook/Instagram) Ads – we run a paid media advertisement to reach young renters, this has created a more diverse respondent group.



THIS YEAR'S FACEBOOK AD-

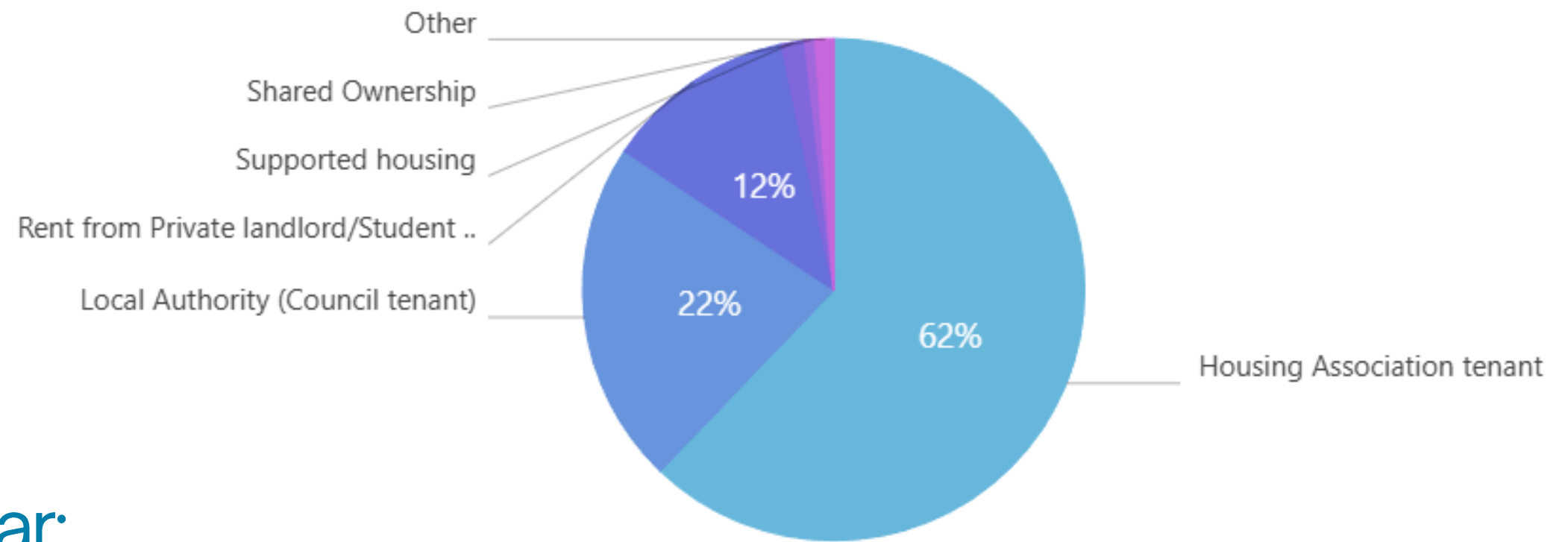
The advertisement graphic is a square with a blue background and a diagonal orange stripe running from the bottom-left to the top-right. The top-left corner contains the text 'WHAT'S YOUR VIEW ON HEATING YOUR HOME?' in white, bold, sans-serif font. Below this text is a clock icon followed by the text 'It only takes 5 minutes'. The bottom-left corner contains the text 'BETH YW EICH BARN AM WRESOGI EICH CARTREF?' in white, bold, sans-serif font. Below this text is a clock icon followed by the text 'Mae'n cymryd dim ond 5 munud'. The top-right corner features the TPAS CYMRU logo. The bottom-right corner shows a photograph of a residential building with solar panels on the roof. A circular TPAS CYMRU logo is also present in the top-right corner of the graphic.

- Our paid advertisement campaign on Meta reached 195,349 people over the entire campaign.
- In total, this advertisement and promotion campaign supported the success of our response rate and encouraged a response from a more diverse range of tenant voices.

VOX POPS - CARDIFF



WHO TOOK PART?



- A more diverse response this year:
 - More Housing Association tenants engaged (62%)
 - Local Authority tenants (22%)
 - 12% of respondents were from the Private Residential Sector (PRS).

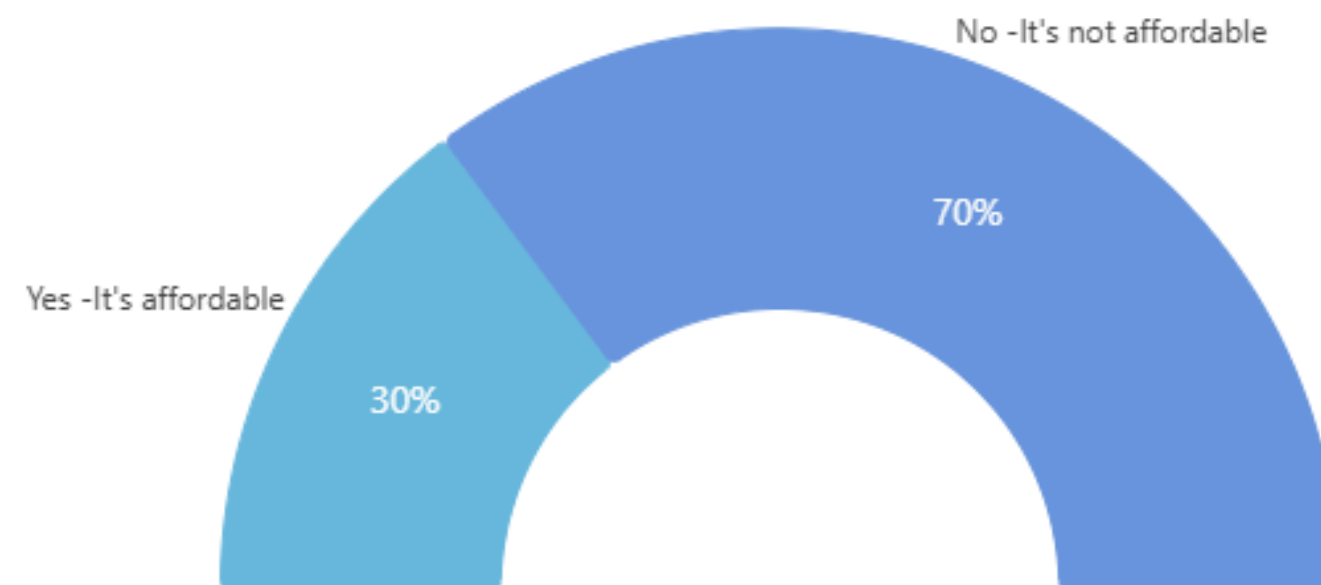


01. Heating Affordability: The Cost of Staying Warm
02. Attitudes and Perceptions: What EPC Ratings Mean for Tenants
03. Concerns Around Transition: What Tenants Worry About
04. Rent and Affordable Warmth: Striking the Right Balance

HEATING CRISIS - HOW BAD IT IS?

70% of tenants struggle to afford heating (vs. 60% last year)

With changes in welfare benefits and PIP policy, disabled tenants—who already report high heating affordability concerns—may face even greater financial strain. The link between disability, heating needs, and affordability highlights the importance of ensuring that welfare changes do not disproportionately harm vulnerable groups.



- Younger tenants (18-45) & BAME communities hit hardest (83%)

Highest energy costs in North Wales (£1,947/year)

Standing charges are highest in North Wales, adding to affordability challenges even when consumption is low.

HEATING AS A NECESSITY, NOT A CHOICE

- Only 29% of tenants can heat their home comfortably.
- 38% cannot afford to heat their home to a satisfactory temperature.
- 17% require specific temperatures for medical reasons.
- BAME tenants (42%) and young renters (50%) face the worst affordability challenges.
- Social housing tenants experience the worst affordability issues and highest medical heating needs.

"New radiators were fitted, but my boiler is old and inefficient."

"I can't afford to heat my home, but I have kids – I have no choice."

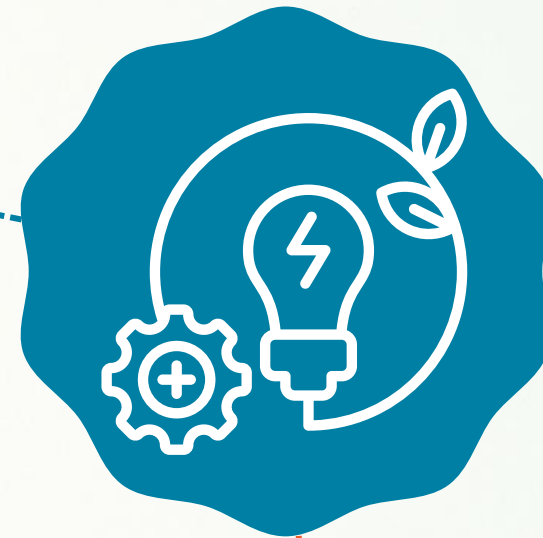
"The windows are so draughty, I can feel the wind indoors."

"My heating system is outdated, and my home has rising damp."

HAVE ENERGY EFFICIENCY UPGRADES HELPED?

35% of tenants reported receiving energy efficiency improvements

65% have not received any upgrades



Did improvements lead to cost savings?

- **18% saw savings**
- **52% saw no difference**
- **30% were unsure if savings occurred**

Breakdown by housing type:

- **Social housing tenants: 38% received improvements**
- **Private renters (PRS): Only 18% received improvements**
- **BAME tenants: 33% reported improvements**

Energy efficiency upgrades don't always result in immediately noticeable financial savings, as factors like energy price fluctuations and usage patterns play a role.

DO TENANTS KNOW THEIR EPC RATING?

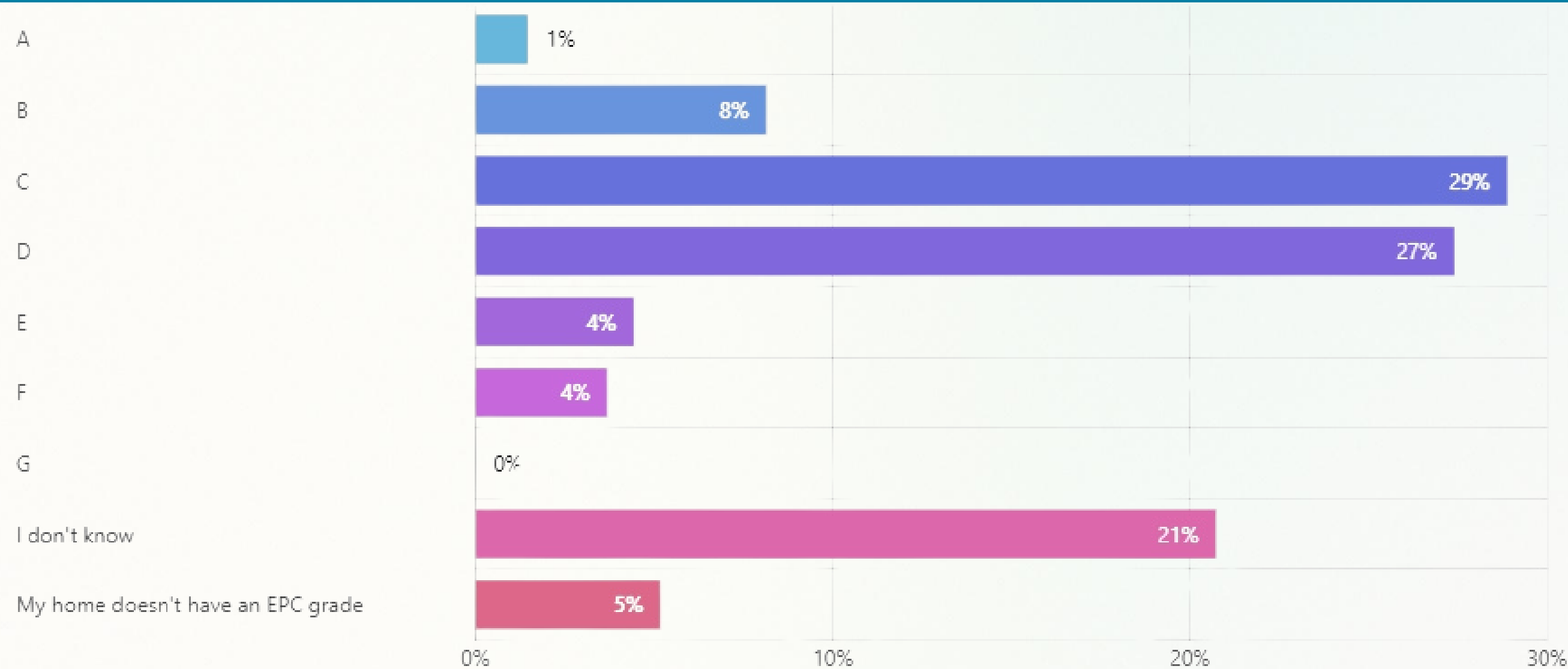
79% of tenants don't know their EPC rating

Awareness among younger tenants (18–30) fell from 43% to 14%

Private renters (48%) more aware than social housing tenants

- Unlike last year, where younger respondents had higher EPC awareness, this year showed a different trend.
- This decline indicates lack of sustained awareness efforts or that newer renters in this age group are less informed than those surveyed previously.
- In contrast, awareness among the 60+ age group increased from 23% last year to 33% this year.
- Suggesting better engagement among older tenants, possibly driven by energy efficiency initiatives targeting older and vulnerable households.

TELL US YOUR EPC!



EPC 'C' was the most reported rating this year (29% of responses), improving from EPC 'D' as the most common rating last year.

BAME respondents reported a higher share of EPC E-rated homes (20%) compared to PRS tenants (13.33%), suggesting that this group may experience higher energy costs due to less efficient housing.

3.33% of PRS tenants reported their home had no EPC rating. This suggests some PRS homes may not be fully compliant with EPC disclosure regulations or are not aware of it.

PERCEPTION VS REALITY



82% of people correctly identified their EPC rating, which is reassuring.

4% thought their home was worse off than it actually is, which could mean they feel colder or struggle with heating, even if their home is rated better on paper.

We also recorded two separate PRS tenants (Cardiff area) who both stated their EPC was C, **but we found no record of an EPC or any registration with Rent Smart Wales.** Both came from ethnically diverse backgrounds, raising questions about unregistered landlords or fake documentation.

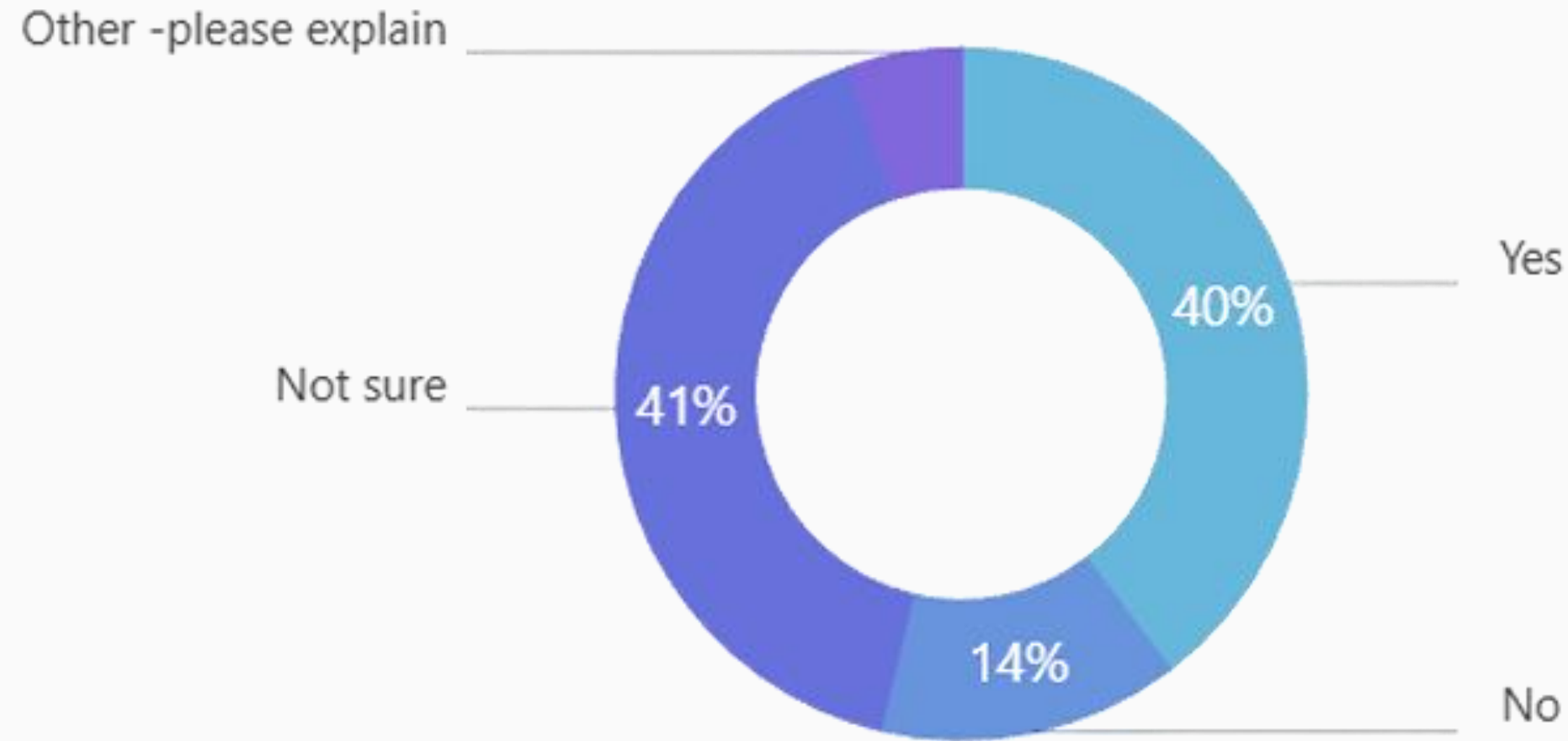


14% thought their home was more energy efficient than it actually is. This might be because of recent home upgrades or just assuming things are better than they are.



In some cases, we couldn't find an EPC record, making it unclear whether tenants were guessing or if their property simply doesn't have an up-to-date certification.

DO EPC RATINGS INFLUENCE TENANT DECISIONS?



- 💬 "My house doesn't have an EPC as I've been here for twenty years."
- 💬 "Choice isn't an option when you are faced with homelessness."



STRIKING THE RIGHT BALANCE

Many respondents opposed rent increase linked to 'Energy Efficiency'

48% of respondents disagreed with the idea of adjusting rent based on energy efficiency.

27% of Respondents supported the idea, while 24% were unsure choosing "Don't Know" responses suggesting that tenants lack clear information on how this system would work.

Who Opposes the most?

- Younger tenants (**18-30**) are the most opposed to rent increases for energy-efficient homes
- Tenants aged **31-45** are the most open to the idea (34% said Yes)
- Older tenants (**60+**) are the most uncertain (29% "Don't Know")

This suggests that affordability is a primary concern for younger renters, who may lack confidence that energy savings will offset rent hikes.

Possibly because they see long-term savings as a worthwhile trade-off.

PRS Vs Social Housing

PRS tenants are significantly more open to rent adjustments for energy efficiency

(15%), **social housing tenants were much more likely to say, "Don't know,"** suggesting a lack of clarity or trust in how the system would work.

39% of PRS tenants agreed with the idea, compared to only 25% of social housing tenants.

• PRS tenants may be more familiar with market-driven pricing adjustments, making them more willing to accept changes if they result in cost savings. **(Unanimous for rejecting the idea)**

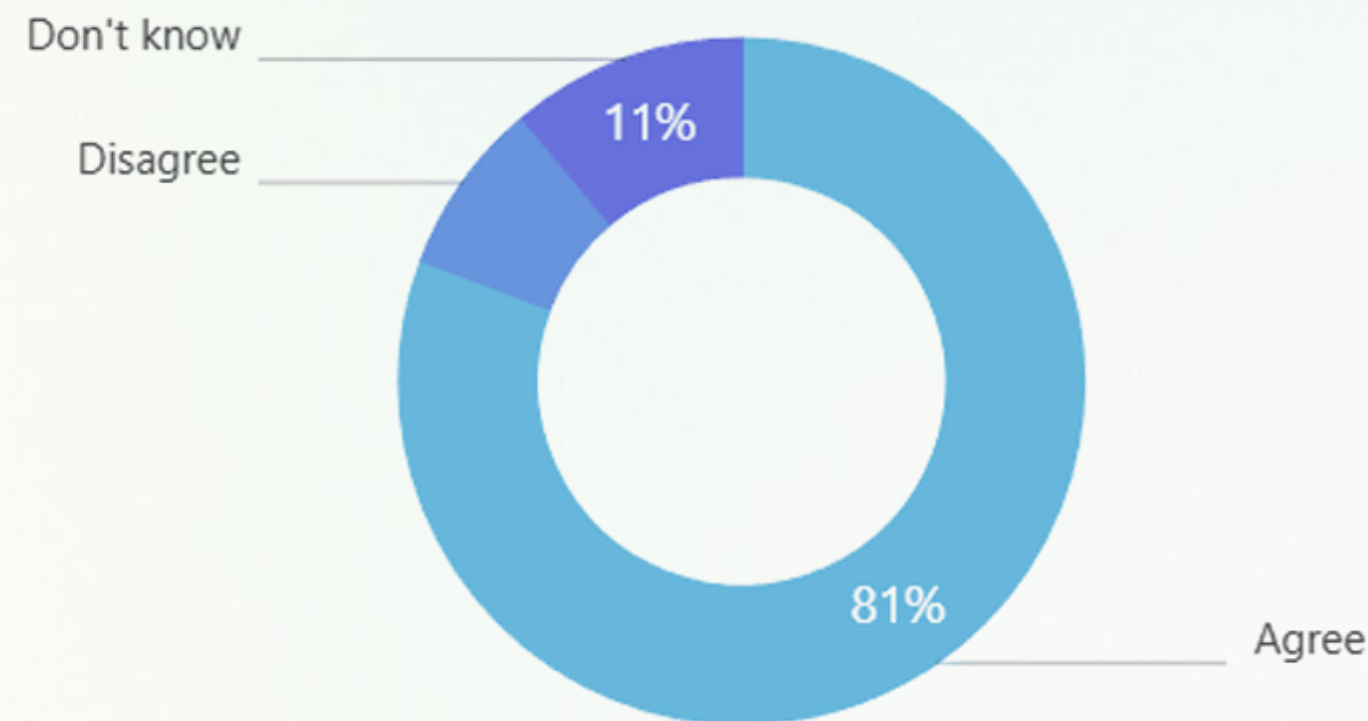


SHOULD LANDLORDS BE REQUIRED TO IMPROVE ENERGY EFFICIENCY BEFORE RAISING RENT?

81% of tenants agree that landlords should not raise rents on homes with EPC E or below unless improvements are made to EPC D or better.

Age Variation

Younger tenants (18–30) show the strongest agreement (93%), likely due to cost sensitivity and expectations for higher housing standards. Older tenants show more uncertainty, prioritising housing stability over cost concerns



Support across sectors

- 92% of social housing tenants &
- 81% of private renters agree

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.

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.

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.

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.

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.





THANK YOU

WE ARE HERE TO SUPPORT YOU