



Llywodraeth Cymru
Welsh Government

TPAS Tenant Engagement Session

25/09/2025

Emma Williams – Director of Housing and Regeneration

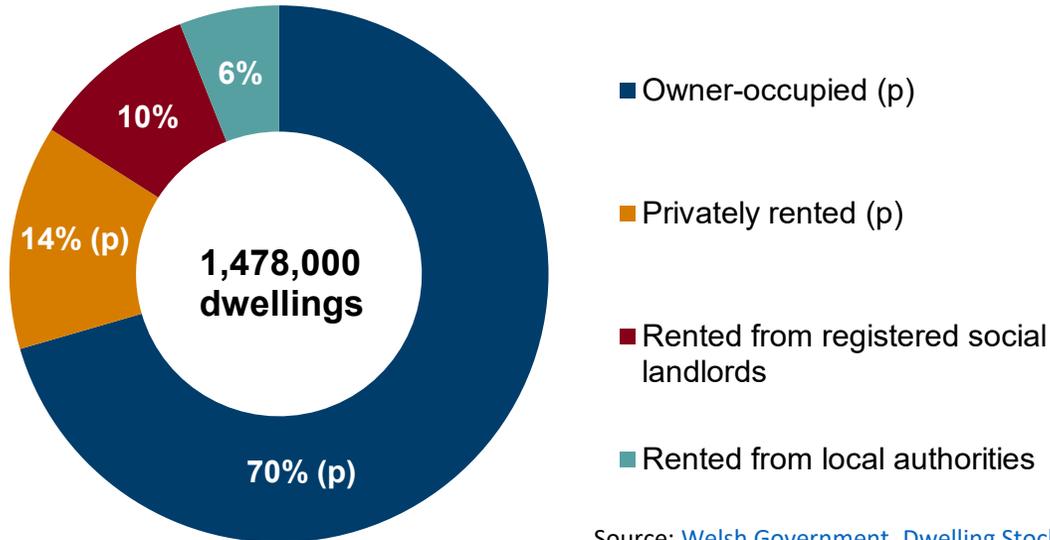
Housing and Regeneration – Senior Management Team Responsibilities



The Welsh Housing Estate (1)

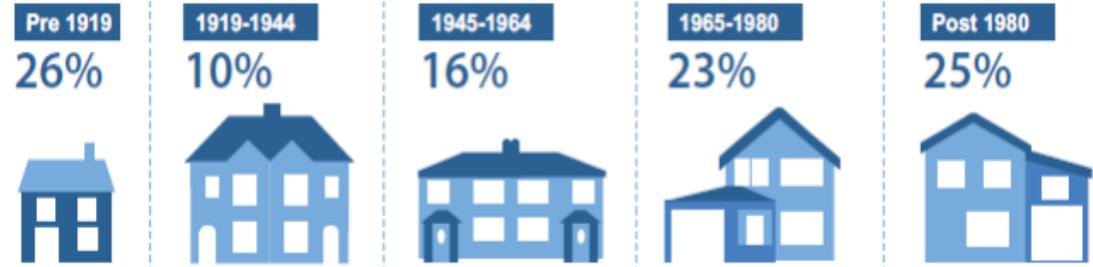
Dwelling stock estimates (March 2023)*

Tenure		
Owner-occupied	70%	1,041,800
Private rented	14%	200,100
Social rented	16%	236,100
Total		1,478,000



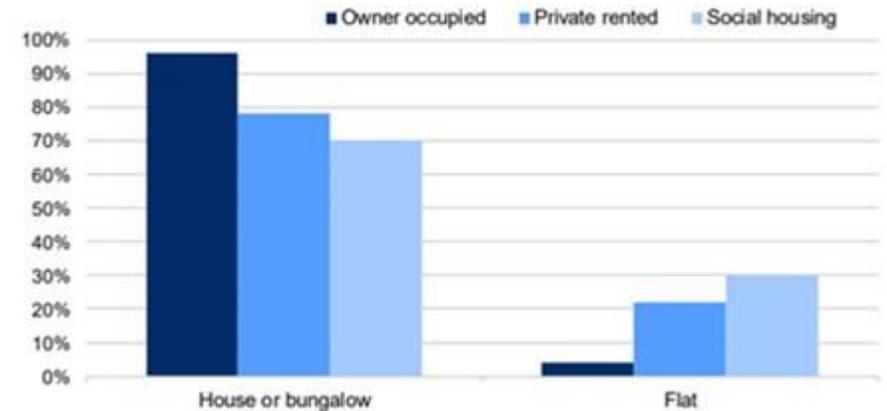
Source: [Welsh Government, Dwelling Stock Estimates](#)

Construction date



Source: [Welsh Housing Conditions Survey 2017-18](#)

Types of Homes in Wales

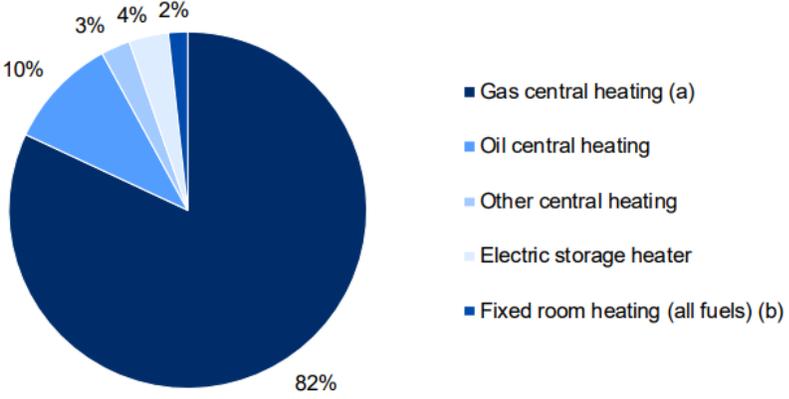


Source: [Welsh Housing Conditions Survey 2017-18](#)

The Welsh Housing Estate (2)

EPC Category	Percentage of homes (%)
A	0.8
B	7.8
C	39.5
D	36.2
E	11.4
F	3.1
G	1.3

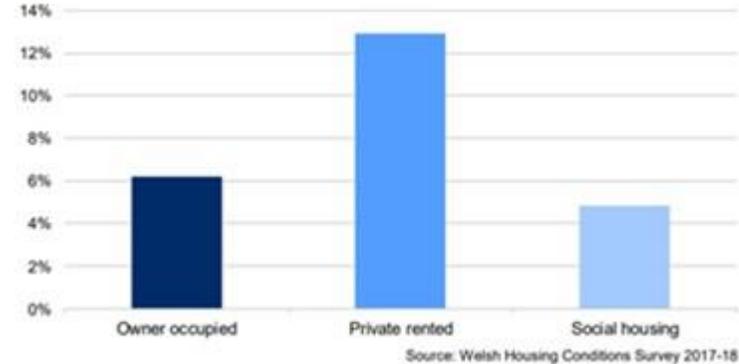
Heating system and main fuel type, Wales, 2017-18



(a) Includes mains gas, bulk LPG and bottled gas (propane) Source: Welsh Housing Conditions Survey 2017-18
 (b) For example, gas fires, coal fires, log burners, electric fires

Source: [Welsh Housing Conditions Survey 2017-18](#)

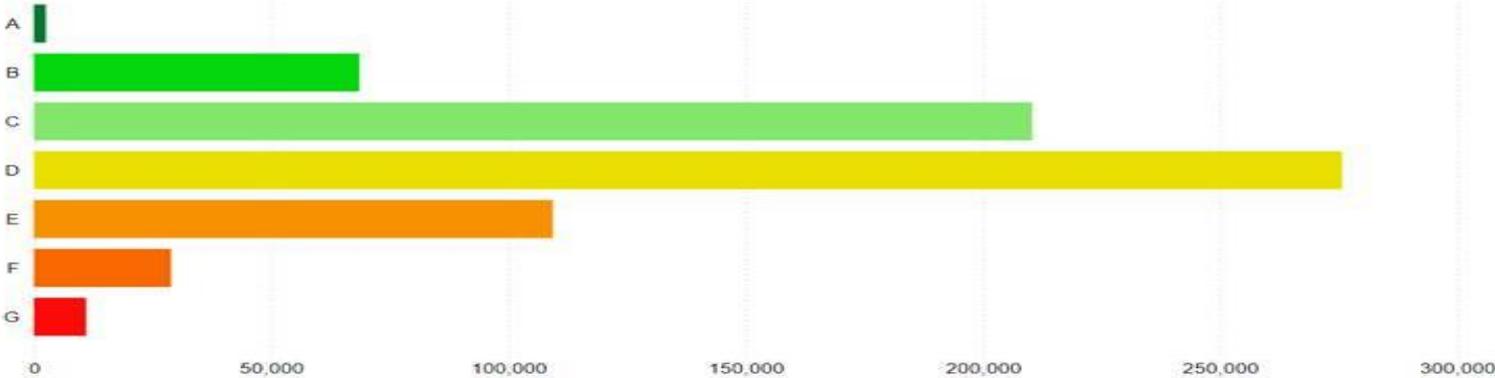
Presence of damp and mould



Source: Welsh Housing Conditions Survey 2017-18

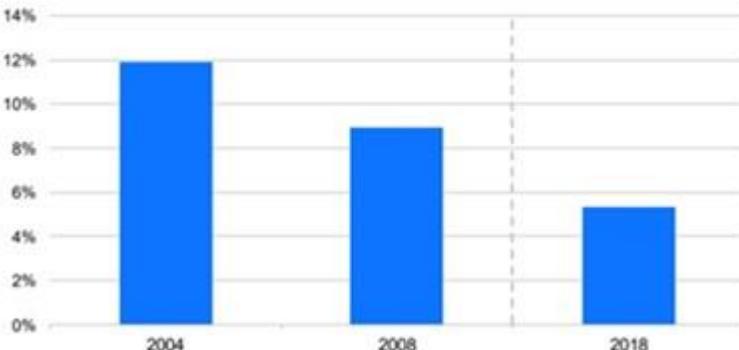
Source: [Welsh Housing Conditions Survey 2017-18](#)

Number of homes by EPC rating, 2013 to 2022



Source: [Energy Performance Certificates \(EPCs\) for homes in Wales: interactive dashboard](#) (July 2024)

Presence of structural defects

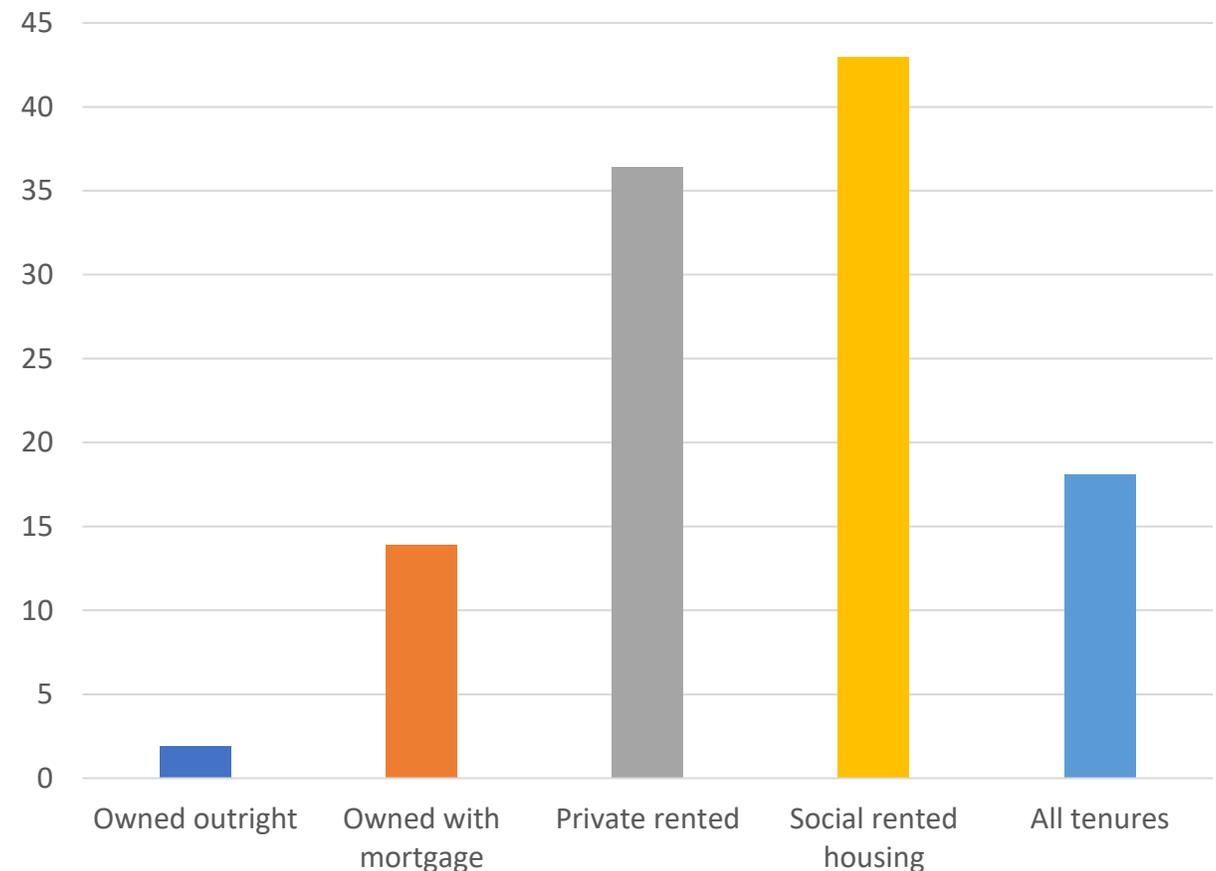


Source: [Welsh Housing Conditions Survey 2017-18](#)

Tenure and housing affordability

- **Wellbeing of Wales National Indicator 49:** Housing is unaffordable if households spend 30% or more of income on housing costs.
- A much greater proportion of renters live in unaffordable housing compared with owner-occupiers.
- Affordability challenges are greatest among social renters.

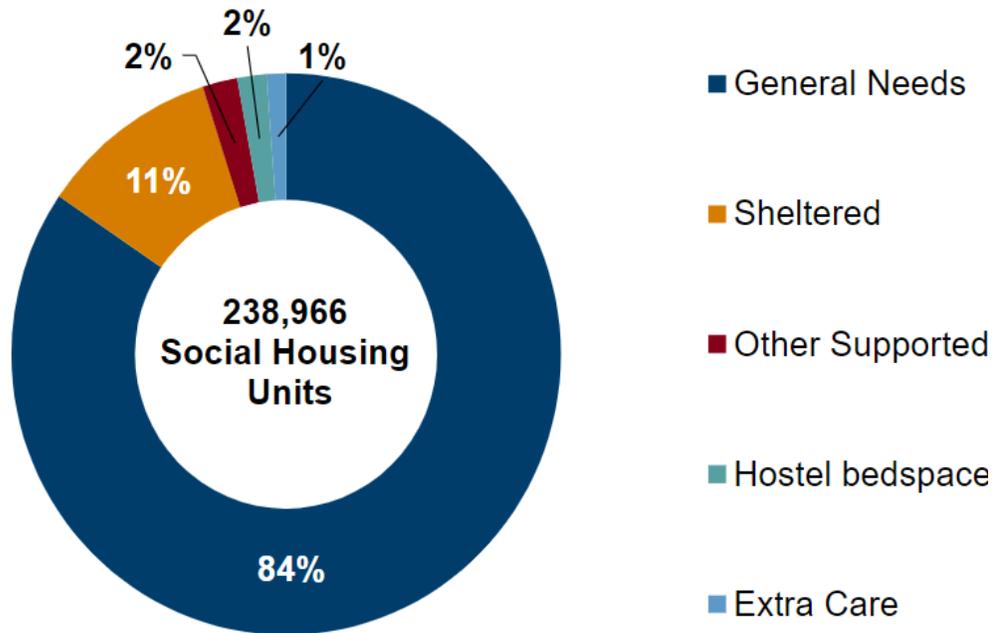
Percentage of households spending 30% or more of their income on housing costs (2019-22)*



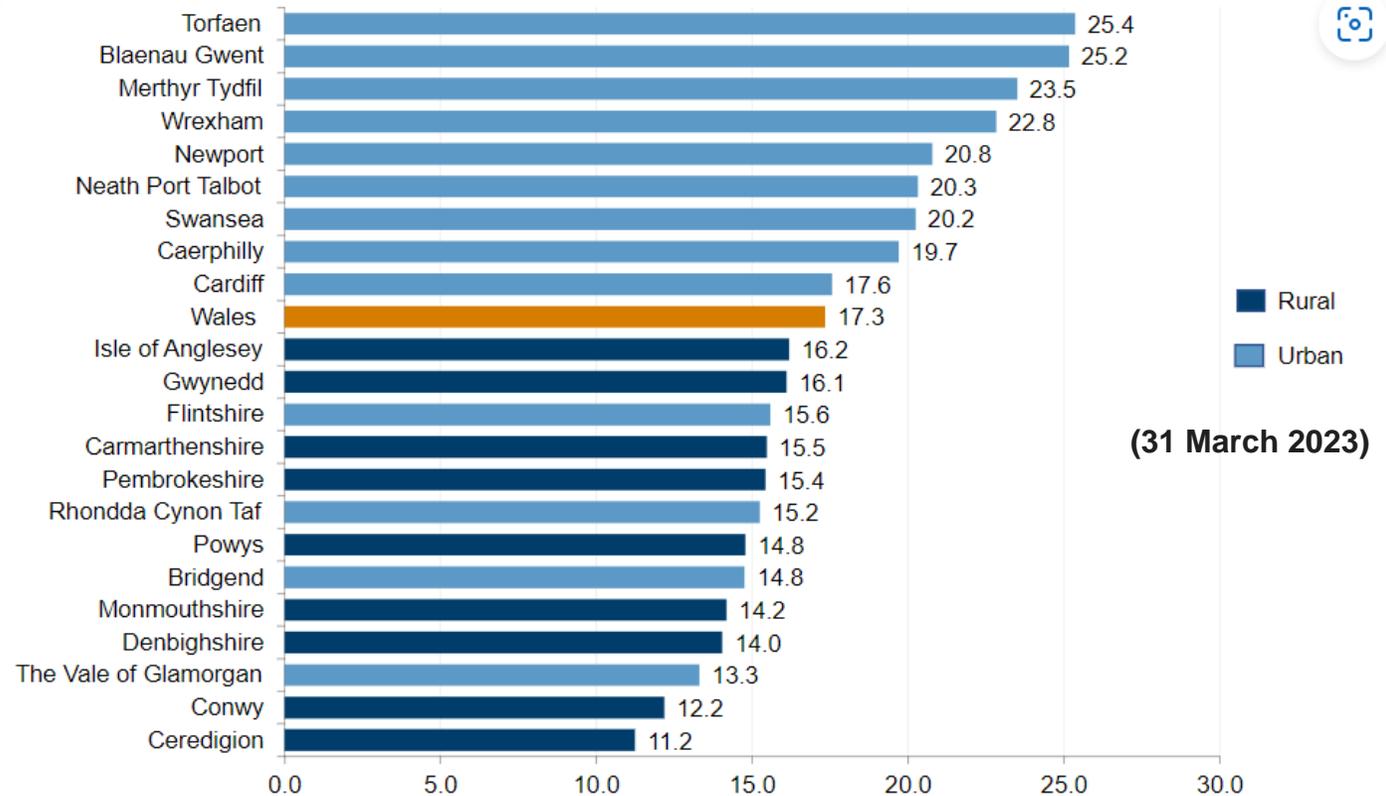
(Source: [Wellbeing of Wales: national indicators](#))

Social housing

- Social housing is provided by Registered Social Landlords (RSLs) and local authorities
- There are 238,966 social housing units in Wales
- RSLs provide most units.
- WG provides funding to support building of new social housing.



Rate of all social housing units per 100 households



Regulation of RSLs

We regulate 45 RSLs in Wales to protect tenants and public investment:

- 34 large developing RSLs
- 11 very small orgs such as Alms-houses

The 11 stock-holding LAs are not covered by regulatory regime



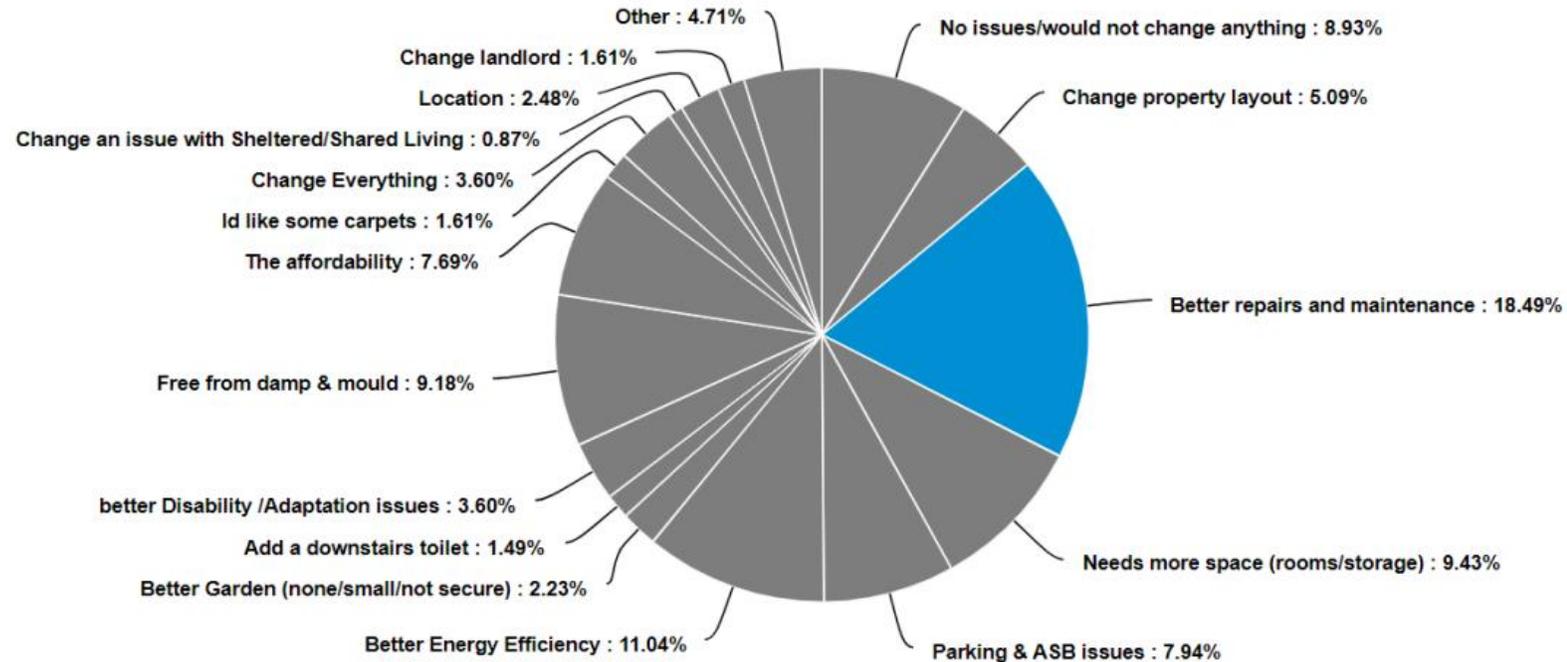
At the end of 2022 Welsh RSLs:

- Owned and manage more than 173,000 homes
- Spent £1.3bn with 85% of this in Wales
- Had a turnover of over £1.15bn
- Had £575m of new debt facility in 2021
- Were forecast to have borrowings of £4.5bn by 2027
- Supported around 27,000 jobs in Wales; 11,000 directly
- Provide homes/services to over 200,000 tenants/residents
- Were estimated to bring in £5.73 for every £1 of Welsh Government funding

Tenants' views: TPAS tenant Survey 2023

One big thing renters would like to see changed in their home

- The vast majority (91%) of respondents would like to see some change.
- Around 40% of respondents would like to see changes such as better repairs, action to address damp and mould, and improved energy efficiency.
- 20% would like design considerations addressed, such as property layout, size, adaptations made including to make the home more accessible in the context of a disability.
- Addressing Anti-Social Behaviour is the priority for many.



[Source – TPAS Wales Tenants' Perceptions Survey 2023 *](#)

* The Annual Survey provides tenant insights from Housing Associations, local authorities and the Private Rented Sector.

Homelessness in Wales

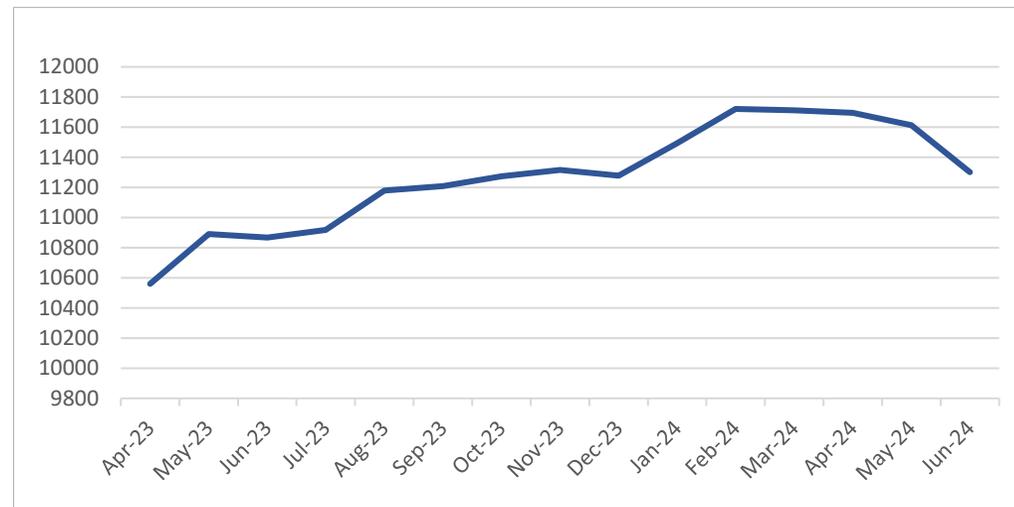
Use of temporary accommodation (TA)

- At 30 June 2024, **11,301 individuals** were in TA, a 4% increase from June 2023.
- **2,881** of these were dependent children under 16, a 14% decrease from June '23.
- Accommodation type temporarily housing most individuals in June 2024 was **'bed and breakfast and hotels'** (32% of individuals, of which 17% were under 16).
- Pressures on services considerable – on average across the year approximately 1,500 people presented every month and placed into TA.
- The average (across the year) number of people successfully moved into long-term accommodation is approximately 700 per month.

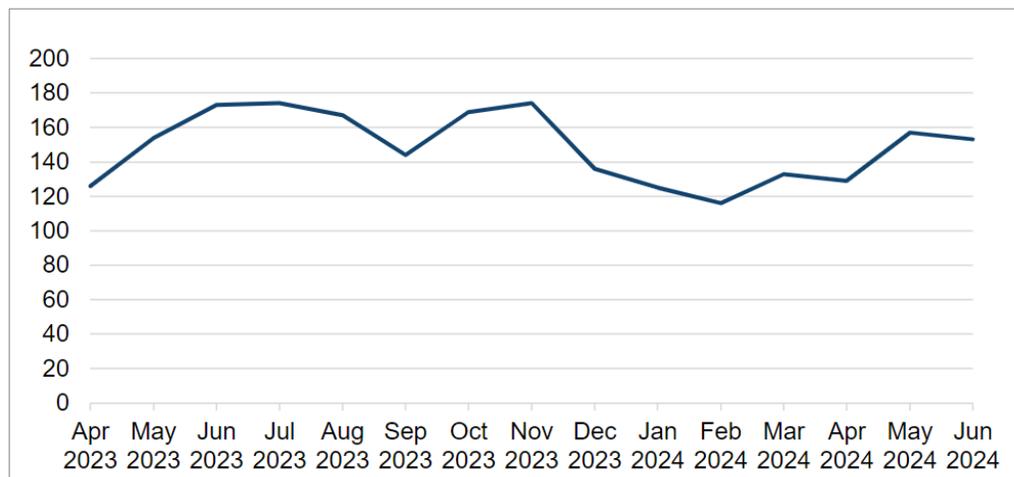
Rough sleeping

- At **30 June 2024**, there were an estimated **153** individuals sleeping rough throughout Wales, an increase of 20 individuals compared with June 2023.
- Caution is advised when making comparisons to previous months, as there may be seasonal impacts on homelessness or other reasons for fluctuations.
- “Hidden homelessness” – sofa surfing, squatting and rough sleeping out of sight – difficult to measure so not captured in official statistics.

Homeless individuals accommodated in temporary accommodation at the end of the month, April 2023 to June 2024



Number of rough sleepers in Wales, April 2023 to June 2024



Programme for Government... (1)

There are 21 commitments in the current Programme for Government, 6 are particularly relevant to the social housing community;

- **Build 20,000 new low carbon social homes for rent.**
- **Reform housing law and implement the Homelessness Action Group's recommendation to fundamentally reform homelessness services to focus on prevention and rapid rehousing.**
- **Publish a White Paper to include proposals for a right to adequate housing including fair rents and new approaches to making homes affordable for those on local incomes.**
- **Support innovative housing development to meet care needs.**
- **Decarbonise more homes through retrofit, delivering quality jobs, training and innovation using local supply chains.**
- **Continue to improve existing homes, helping us tackle fuel poverty, create much needed jobs, training opportunities, and supply chains.**

Housing and Regeneration – budgets 2024/25

HOUSING AND REGENERATION - REVENUE

- Homelessness Prevention
- Independent Living
- Quality Housing
- Building Safety
- Affordable Housing
- Housing Revenue



HOUSING AND REGENERATION - CAPITAL

- Independent Living
- Integrated Care Fund
- Quality Housing
- Affordable Housing
- Building Safety
- Market Housing
- Land Division
- Regeneration



In 2024/25, the combined revenue and capital budgets for Housing and Regeneration is **£1.1bn**

Total Capital: £865m

Total Revenue: £227m

Housing Support Grant (HSG): £182m

44,000 people supported through HSG-funded services in first 6 months of 2023-24.

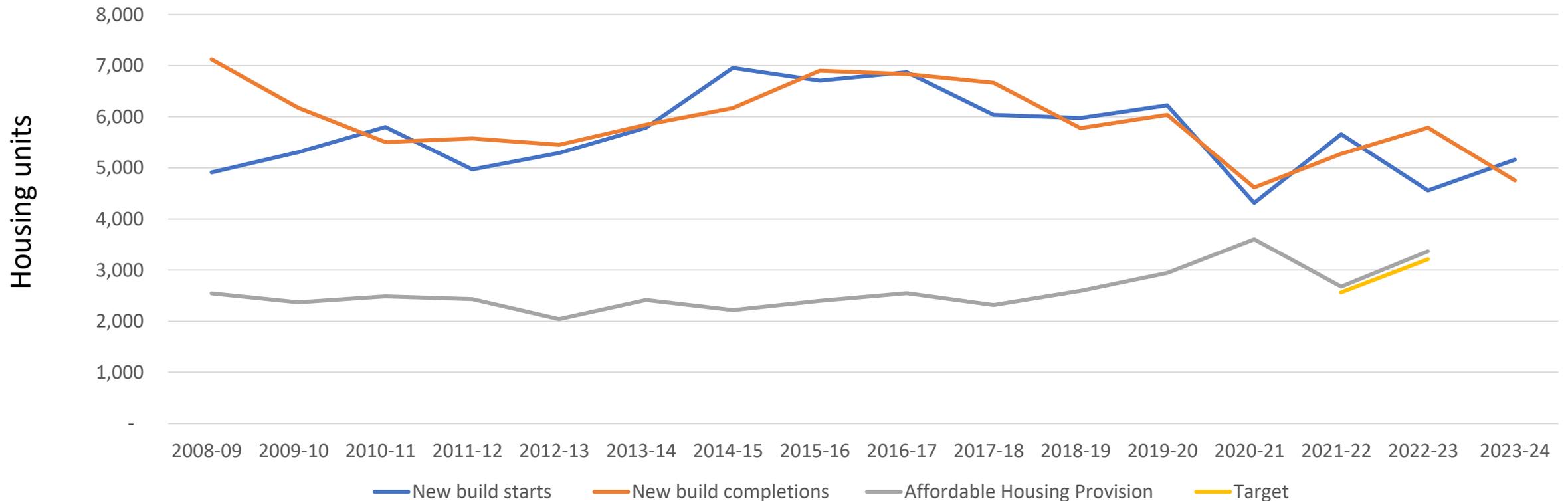
Social Housing Grant (SHG): £255m

More Homes



- Increasing supply of market and affordable housing
- Delivery of 20,000 social homes for rent – key target
- 2022-23 saw our second highest number of additional affordable units delivered (3,369 units)

Housing Delivery



Homelessness policy

- Work underpinned by [Ending Homelessness Action Plan](#)'s 16 high-level actions (November 2021), focused on ensuring **homelessness is rare, brief and unrepeated**
- PfG commitment: Reform to Homelessness legislation
 - [White Paper on ending homelessness in Wales](#), published in October 2023.
 - Bill introduction planned – May 2025
- **Rapid Rehousing** – move from reliance on temporary accommodation to a system focused on prevention and rapid rehousing into settled accommodation
- As at 31 May 2024, 11,748 individuals were homeless – either placed in temporary accommodation or sleeping rough (not incl. 'hidden homeless')

Social Rent Policy

[The Rent and Service Charge Standard 2020-2025](#) (the 'Rent Standard') governs social rent increases. It has been extended to March 2026.

The annual maximum social rent increase is capped at CPI + 1%, unless CPI in September is outside of the range of 0% - 3%, when Welsh Ministers must determine the annual social rent uplift.

	CPI	Maximum Rent Cap for following year
Sept 2021	3.1%	3.1%
Sept 2022	10.1%	6.5%
Sept 2023	6.7%	6.7%

We are currently developing a revised rent policy. The rent policy:

- gives certainty to tenants, social landlords, funders and WG about how rent decisions are made;
- balances affordability for tenants with financial sustainability for social landlords; and
- incorporates learning and good practice from recent years into a revised rent policy.
- The rent policy plays a crucial role in enabling the sector to borrow.

Standards

Welsh Housing Quality Standard 2023

- The 2023 standard is the long-term standard which seeks to improve the quality of Welsh social homes so all Welsh tenants can live in healthy, well maintained and low carbon homes.
- All landlords are required to produce an 'Affordable Warmth and Decarbonisation Plan' within the next 3 years.
- The plan will include a Whole Stock Assessment of landlord's properties and a Target Energy Pathway. This will outline what the landlord needs to do with each property, costs and timings against the targets of EPC Band A and EIR 92.
- The current focus is on a near term step of a fabric-based EPC C to be reached by 2029. This is to ensure that the hardest to treat homes are not left behind
- We are currently working with a small subset of landlords to understand how we can increase landlords' capability to achieve the standard including testing the guidance and understanding the cost profile.

Welsh Development Quality Requirement 2021

- Covers minimum space requirements, value for money and low carbon energy and decarbonisation requirements for new builds.

The Optimised Retrofit Programme (ORP) is a test and learn programme to support social landlords to undertake works on their properties to achieve WHQS 2023. To date, the programme has enabled retrofit of around 27,000 homes and represents a capital spend of c£290m

Thank you
questions and discussion