

SECOND ALL WALES ANNUAL TENANT SURVEY



THE RIGHT TO FEEL SAFE AND WARM

FULL REPORT

January 2023
www.tpas.cymru



Ariennir yn Rhannol gan
Lywodraeth Cymru
Part Funded by
Welsh Government



TENANT VOICE SPONSOR

Foreword

Croeso and welcome to TPAS Cymru's second **Annual All Wales Tenant Survey on Tenant Perceptions**. This annual survey and report are 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 provides decision makers with impactful insight into what really matters to tenants.

We received an excellent response rate from across Wales from a wide range of tenure, including tenants of Housing Associations, Local Authority Housing, Supported Housing and tenants in the private rental sector. This increased private renter voice is important in demonstrating the challenges, similarities and differences in renter experience

This report provides clear evidence of what matters to tenants. There is a desire across the housing sector to shift the position of accountability, empowerment and listening at the top of the agenda, but the sector must go further than simply listening. The sector has a responsibility to act on what it hears. The report aims to help focus tenant groups, housing staff and policy makers on ways of improving services and help focus on what really matters to tenants.

My summary of key findings includes:

- 1) Energy costs are a huge concern and are really hurting renters, especially younger, employed tenants - both social housing or private renters.
- 2) Retrofit and other decarbonisation projects offer significant opportunities to address energy efficiency and fuel poverty.
- 3) Antisocial behaviour is a real concern for social housing tenants.
- 4) Affordability is becoming more and more of an issue for private renters, as they compete for limited stock.
- 5) Tenants want better communications about planned works and want to have their say in shaping services.

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

Finally, I would like to thank all tenants who took the time to respond to this survey and we welcome feedback on how we can improve this survey going forward. Our aim is for this to be an annual, survey-informed report to track tenant perceptions and subsequently, to help shape service improvement.



David Wilton,
Chief Executive, TPAS Cymru

Introduction to TPAS Cymru's Tenant Pulse

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

1) Annual surveys around key subjects that TPAS Cymru feel need tracking.

Both our current annual surveys are themed around:

- Energy attitudes & Net Zero
- An Annual 'What Matters?' survey analysing what really matters to tenants and their communities

2) **Specific topical surveys** co-developed with stakeholders and housing policy influencers, such as Welsh Government, to help bring insight to policy developments.

3) **Specific audience surveys** – these are often not as visible, as they are aimed at specific audiences e.g. PRS Tenants in north Wales, responding to questions on support options, Housing Association tenants answering about regulation reform, etc.

We hope the findings and recommendations within this report offer valuable insight into the challenges tenants are experiencing and their attitudes to housing. We believe by listening to tenants and stakeholders, we can have open, honest, and transparent conversations.

All TPAS Cymru Pulse reports are published on the Tenant Pulse section of our website. www.tpas.cymru/pulse

Origin of this report

Our Annual Survey includes valuable tenant insight to enable us to identify common issues and challenges to specific tenure with housing association, Local Authority or private rental sector (PRS). We aim to provide everyone working in housing in Wales with 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. We believe that listening to tenants, being open, honest, and transparent in policy and decision making, will lead to tenants living not only in homes and communities that they can survive in, but can truly thrive in too.

This second Annual Survey incorporates the final Tenant Pulse surveys of 2022. It follows our National Energy & Net Zero survey that was published in August 2022 and our Rent Setting Consultation Survey published in October 2022. We continue to champion tenant voice and are proud to have shared thousands of tenant voices over the last year.

Authors: David Wilton and Eleanor Speer
January 2023

Research Methods

Under the TPAS Cymru Tenant Pulse branding, an online survey was completed by tenants across Wales during November 2022. A paperless medium was employed, following the success of previous 2022 Pulse surveys. Tenants were invited to respond to a series of 17 questions (See Appendix A).

Promotion of the survey

It was issued to tenants subscribed to Tenant Pulse, including PRS tenants. Like all long-term databases, some members have been on the mailing list for 5 years, so we see a degradation in response rates.

With responses remaining anonymous, it is a challenge to identify and remove non-responders. We are continuously adding new members - most recently after our National NetZero and Energy Survey in May and TPAS Rent Consultation Survey in October. Therefore, our cohort of Pulse tenants is continually evolving, growing and engaging and remaining active. We continue to raise awareness of our Pulse database through our everyday work and interaction with tenants, as well as promotion and at our Annual Conference, last held in mid-November 2022.

Some social landlord and tenant groups have also offered support by publicising Tenant Pulse to their tenants.

There are some noticeable differences in tenant responses, depending on the level of engagement and promotion of landlords – Vale of Glamorgan Council and Pobl, for examples, generated more responses following increased social media engagement, TPO visits to tenants and Landlords contacting tenants directly to tell them about the survey.

We used targeted paid adverts across Meta-owned platforms Facebook and Instagram to target private renters, which was more successful than other channels for reaching non-engaged tenants from a more diverse demographic.

Frustratingly and confusingly, Meta rejected our Facebook adverts but approved near-identical Instagram versions.

Support from PRS Facebook groups helped us reach younger tenants.

We're pleased to have reached 35,000 people in total across both platforms and noticed a significant growth in the age range of those responding via Instagram with 19% of PRS responders via Instagram being under 30 years old and 54% under 45.

As TPAS Cymru is continually striving to engage with a wider range of tenants, we trialled Mastodon as an additional and last-minute platform to promote the survey, With Mastodon hitting news agendas as the latest platform for social media users switching from Twitter, we used it to share a link to the survey, just 3 days before deadline, and invited any Welsh tenants to take part.

- Mastodon generated: 19 re-blogs
- 16 likes

However, more importantly, a late flurry of responses, means that circa 8-10% of total responses may have come from Mastodon during the survey's final 3 weeks. They were from both social tenants and private renters, unlikely to be associated with TPAS Cymru, which was our aim. Closer analysis of these individual responses for that period indicates reliable and valid data.

Data integrity

Data was reviewed for anomalies, with no significant issues identified.

Pan-Wales members were invited to respond to multiple choice questions on their current rental experiences, thoughts, and opinions. Respondents were invited to provide additional comments.

Response summary

A total of seven hundred and twenty-four (724) tenants from every Housing Association and stock retaining Local Authority in Wales responded to this survey, bar one Local Authority landlord. This single exception is a first for our Tenant Pulse surveys and an anomaly in our reporting. We will engage this Local Authority to ensure their tenants' voices are represented going forward.

Despite this anomaly, we remain confident that the wide representation of geographical submissions from across Wales in our responses, offer valuable insight into the perceptions and attitudes of Tenants in Wales.

Highest 3 tenant responses by landlord in Social Housing	Lowest 3 tenant responses by landlord in Social Housing
Vale of Glamorgan Council	Cardiff Council
Pobl	Merthyr Tydfil HA
Barcud	Cardiff Community Housing Association

Highest 3 responding areas in the Private Rental Sector	Lowest 3 responding areas in the Private Rental Sector
Cardiff	Torfaen
Gwynedd	Neath
Conwy and Rhondda Cynon Taf (<i>joint 3rd</i>)	Ynys Mon

Throughout 2023, TPAS Cymru aims to collaborate with the areas and Housing Associations listed in the lowest responding areas, to improve their tenant voice responses and ensure tenants feel like their voices are heard – this being the ethos of this National Tenant Survey.

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	153
Housing Association Tenants	389
Private Sector Tenants	156
Supported Housing Tenant	18
Other (mainly shared ownership)	8

Note: When compared to 2021 Annual Survey data, 2022 findings demonstrate a higher percentage of responses from the PRS sector, enabling a more significant benchmark for comparing and contrasting social housing tenants and private renters.

Age breakdown of respondents

The breakdown of age of respondents in Private Housing was:

18-30	19%
30-45	34%
45- 60	28%
Over 60	19%
Prefer not to say	0%

The breakdown of age of respondent in Social Housing was:

18-30	3%
30-45	19%
45- 60	31%
Over 60	46%
Prefer not to say	1%

There is a significant difference in age demographics from respondents in social housing compared to private tenants. For example, the percentage of responses from tenants under 45 varies significantly between the two groups – 53% in private sector housing compared to 22% of respondents in social housing. However, this pattern is also seen in the over 60 group – but with 20% more respondents from social housing than PRS.

Overall, the 2022 survey provides more balanced responses across all age groups, compared to 2021's survey – a factor that TPAS Cymru aims to further improve through the Pulse platform. The 2022 survey provides a higher percentage of responses from younger tenants in the PRS than in 2021, with 53% of responses from tenants under the age of 45.

Black Asian Minority Ethnic (BAME) background –

4% of tenants in private housing who responded identified as having a Black Asian Minority Ethnic (BAME) background. This is 1% rise from our 2021 Annual Survey.

2% of tenants in social housing who responded identified as having a Black Asian Minority Ethnic (BAME) background. This is 1% decline in the representation of tenants from our 2021 Annual Survey.

According to StatsWales, Wales' national population comprises 5.1% of people who identify as BAME, therefore, TPAS Cymru recognises that further efforts are needed to engage with BAME voices and represent these in future Annual Surveys.

Please note: StatsWales data incorporates data up to the 30th June 2022.

<https://statswales.gov.wales/Catalogue/Equality-and-Diversity/Ethnicity/ethnicity-by-area-ethnicgroup>

PRS Tenant relationship - are they renting direct from landlord or through a letting agent?

We were pleased with the split we achieved for renters with a direct relationship with their landlord.

We understand that there are a range of circumstance and tenancy arrangements within the PRS. We asked PRS tenants to describe the type of landlord they rent from, in order to gain a wider overview of Wales' private tenancy landscape.

Type of tenancy	Percentage of responses
Rent directly from a private landlord	48%
Rent via a letting agency	47%
Rent from a large organisation (E.g., University, hospital, commercial organisation)	2%
Rent a spare room in a friend's/family house	2%
Other	1%

Key Findings

About this survey

- This survey type was our second and received a similarly high response rate to last year.
- A wide demographic range of tenants responded, and we are pleased to grow response rates from younger PRS tenants.
- We believe there is a significant percentage of social housing tenants who took part that are not currently engaged in established tenant participation channels. It is important that these voices feature, so as to provide a wider, more diverse perspective. We are confident that innovation through digital engagement is what led us to this response.
- We note there is further work to be carried out to gain more responses from certain diverse and geographical profiles.

Overall satisfaction

As expected, 60% of tenants in **social housing** plan to stay in their existing home for the foreseeable future and they display high satisfaction levels.

The tenant view of a 'home for life' has, however, declined since last year with 15% of social housing tenants stating wanting to move due to Anti-Social Behaviour and unsuitable conditions of the home. The challenge of connecting tenants seeking a bigger home with those wanting smaller, continues to exist. The picture is different for **private renters**:

Firstly, private renters are far more positive when a good relationship exists with their landlord or agent.

- *"We love our home Rented it since 1990."*
- *"It's a lovely family home."*
- *"Our house is decently maintained, in a lovely neighbourhood and of a good size. It is definitely not energy efficient, and it's quite expensive. Overall, it's a good home."*

Unfortunately, findings indicate that this is not always the case for all private renters.

Only 37% of private renters (compared to 45% in 2021's Survey) intended on staying in their home for a long period of time. Just 8% of these are under 30. In the report, tenants give various reasons for wanting to move, with many private renters have a clear aspiration to buy one day. 30% of private renters hope for this, with as many as 65% of younger renters striving for this. This falls as the age of renters increases and they realise it is either unattainable or renting is a lifestyle choice.

Social housing tenants tended to be happier renting and happier with the home they rent than private renting tenants. Social housing tenants talk of tenure security, higher trust in landlord/area, repairs and properties adapted to their needs.

However private renters were more positive than social housing tenants about the community they live in.

Key challenges

Affordability

The Housing sector has recently been required to consider affordability as part of a wider cost of living crisis. In keeping with other data sources, 27% of **social housing tenants** rely on earnings as their main income, while **private tenants'** earned income is significantly higher at 67%.

Within the private sector, age plays a significant part in household income – 88% of those under 30 who responded, rely on earned income as their main income source.

There is some positivity in the responses around social housing affordability of rent (60% compared to 54% last year).

Tenants of sheltered schemes or supported living are those most positive about affordability:

- *"It is all I require at this part of my life."*
- *"As a [tenant in a] supported living facility, I have the opportunity to socialise with my neighbours or to be in my own flat."*
- *"Good landlord, lovely community."*
- *"It is exactly what I need & in an area I like living (sheltered scheme)."*
- *"It is affordable, and it is damp and mould free."*
- *"Can't fault anything, good community but left alone if required."*

Private rent affordability is more of a challenge for many:

- *"It IS expensive for what it is, but the housing market just rocketed, and we had no choice."*
- *"The flat is very basically maintained with damp and draughts."*
- *"It's certainly not affordable when rent has gone up 3 times in a year."*

While many **social housing** tenants felt rent was affordable,, those saying they were not struggling has fallen from 71% to 54%.

The rising cost of energy bills from barely registering last year to 35% this year, is a major factor in this decline in those struggling with affordability. Similarly **private renters** being able to afford rent and bills have fallen from 66% to 46%. Those commenting that 'rent is too high' has risen from 9% to 17% since last year and to 50% of BAME respondents.

Like social housing tenants, private tenants aged between 18-30 are struggling with affordability the most.

The inter-linked trinity of damp and mould, energy efficiency and well-maintained homes

In these challenging times, **social housing tenants** want further improvements to their homes. As expected, awareness of and dissatisfaction with damp and mould is a key issue, as evidenced by tenants being aware of energy efficiency and wanting improvements in this area. Similarly, last year responses indicated that tenants wanted better windows, which continues to feature highly.

Perception and timing are key with tenant opinions. Properties have not become less energy efficient within a year, but with energy costs rocketing recently, people are more aware of heating costs and less accepting of damp and mould problems.

Priorities for social housing tenants responding were to:

- Have a well-maintained home (41%)
- Free from damp & mould (40%)
- Is Energy Efficient (22%)
- Is in a good community (47%)

There are links between many of these factors - energy efficiency, damp and mould problems and well-maintained properties could all be addressed as soon as funding and logistical challenges of WHQS2 are overcome by the sector.

Private renters had similar priorities social housing tenants as:

- Affordable and well maintained remained the same as last year
- Is Energy Efficient (down from 17% to 12%)
- Free from damp and mould (from 40% to 34%)

One commented: "Maintenance is adequate, energy efficiency is quite poor and old building makes this more challenging."

Anti-social behaviour (ASB)

Perceived ASB featured very heavily in tenants' views of their home and community. This is consistent with data and feedback collected at other TPAS Cymru tenant events.

It was the highest response topic for social housing tenants when asked about '*The one thing you would change about your community*'. Drugs, noise pollution and problematic neighbours were referenced as common problems

Tenant responses echoed a feeling of helplessness and either the landlord not being supportive or making things worse by further allocations and an overall lack of support.

"No support from landlord in dealing with antisocial behaviour"

"Since he was moved in, I have had to call the police a load of times..."

"There's drugs, antisocial behaviour, people shouting, rubbish everywhere - it's an embarrassment to live here."

"Harassed by neighbours. Landlord refusing to act and fails to keep proper records."

Homeowners

Very few **Social housing tenants** responding indicated '*Just renting short term until I can afford to buy*'. Tenants commenting that buying a home is not perceived as financially realistic. Some didn't want to, because of the adaptations and support services that social housing offers.

(c30% **of private renters** and as many as 65% of younger renters responded that they want to buy. Private renters in traditional rural areas including Gwynedd, Powys, Pembrokeshire and Carmarthenshire etc, had the least aspiration to purchase a home. There is significant disparity between local wages and house prices in these areas in recent years.

Those most keen to buy live in urban areas like Cardiff, Swansea and Wrexham.

Priorities

What do tenants believe your landlord's priorities should be?

Part 1: Social Housing tenants responded:

1. Maintenance and repairs remain the main priority for tenants.
2. energy efficiency is more of a priority than last year.
3. Strong feelings that landlords need to act much more on ASB.
4. Tenant Voice matters.
5. Service charge transparency was mentioned a lot more than rent transparency.
6. Allocation policy needs to be better understood.

PRS Tenants views on where Landlord priorities should lie:

- 1) Like Social Housing renters, PRS renters prioritise:
 - Maintenance and repairs
 - Energy Efficiency
- 2) Specific PRS themes on what landlord priorities should be:
 - Security of tenancy
 - Enforcement of tenant and landlord regulations. (e.g., notice period before visits)
- 3) PRS tenants did not comment in any noticeable numbers on:
 - Landlords tackling ASB
 - Tenant Voice
 - Service charge transparency
 - Allocation policy

We asked *Social Housing* tenants if they could change ONE thing in their HOME, what would it be?

- 1) Better energy efficiency
- 2) The desire for more space in home
- 3) Improvement in time waiting for repairs
- 4) Remedy garden issues
- 5) Change or update of building fabric
- 6) Resolve parking and anti-social behaviour issues
- 7) To fix damp and mould

We asked *Private Renters* if they could change ONE thing in their HOME, what would it be?

- 1) Energy efficiency
- 2) Updated or changed Building fabric/repairs
- 3) Affordability
- 4) To fix damp and mould
- 5) Need more space

We asked what one thing would social housing tenants change in their community?

Nearly a quarter **of social housing tenants** wouldn't change anything in their community, but the remaining 76% identified several challenges.

ASB was the highest problem with frequent references to drugs, noise and problematic neighbours. Some comments might not meet a 'technical criterion' for ASB, but that doesn't mean it is not causing distress to tenants. There were frequent references to feeling helpless and that landlords were either not acting on ASB complaints or were making it worse with further unsuitable letting.

A similar percentage of private renters as social housing tenants are happy with their community, the 79% of private renters who would change something, raised a bigger variety of community issues than social housing tenants.

ASB concerns didn't feature as high for private renters, as the social housing sector usually provides housing for a greater number of more challenging tenants). Private renters focussed more on wider community ASB than ASB from immediate neighbours.

However, private renters are much more aware and concerned about the impact of second homes/Airbnb properties, as they perceive it as impacting on availability and affordability.

Interaction with your landlord

It's positive that more **social housing tenants** than last year, are engaging with their landlords in various ways.

There was a rise in the number of tenants 'Completing a tenant survey' and 'Logging repairs and a drop in those who have seen landlord communications.

Younger people were less likely to complete satisfaction surveys, attend events and read landlord communications, therefore as a sector, we must address this.

Notably, we also observed the following trends:

- Nearly 80% wanted to know about plans for maintenance and planned works
- Nearly 40% wanted to know how rent and service charges are calculated
- 30% - 34% wanted advice on financial support available, more about service expectations and what is happening in their community

Overall, a similar number of **PRS tenants** and social housing tenants are logging repairs / maintenance.

But there are much lower levels of tenant engagement and communications in the PRS sector, where relationships are more transactional, in keeping with previous PRS research.

Interestingly, the most important information that interested private renters were maintenance and improvement plan for their home.

Significantly, private tenants are twice as willing as social housing tenants, to deal with a letting agent rather than directly with a private landlord.

Findings specific to certain profiles or characteristics

Specific PRS issues

The data indicated that there were two key specific PRS themes in the responses:

1. Insecurity of tenure. This included a feeling of lack of rights or autonomy of control regarding rent rises, asking for repairs and fear of evictions if tenants complained. Tenants want greater enforcement for landlords who do not offer a decent/legal offering.

'My landlord has just increased my rent from 1250 to 1600pcm and I have no choice due to no other rented properties being available. I searched months for this place. This house is on the market, and I will need to move again when it sells.'

2. Tenants feel stuck in private housing as many are unable to afford own property, or rent is too high which results in not being able to save for a deposit.

'There is a huge lack of houses to rent as so many are second homes and holiday rentals locally.'

'In the winter it has black mould and in the summer mildew. The landlord has declared himself exempt from having to increase the EPC above an E. I am trapped as I cannot afford a £200pcm price hike since all the second homers descended on Pembrokeshire. He might put up rent 1st Dec.'

Tenants who identify as black, Asian and minority ethnic.

The data across social tenants and private renters did not suggest significant divergence on the fundamental issues like energy efficiency, damp and location.

Although there were exceptions. Exceptions included:

Private Renters who identified as BAME had similar house ownership aspirations as wider response rates but had significantly lower satisfaction with existing rental conditions.

In social housing, people identifying with a BAME ethnicity were much more likely to be working (46% compared to 27%), with a much lower % in retirement accommodation (9% compared to 32%). We would welcome exploring this further if this is typical of social landlord demographics across Wales, as it might be that those identifying with a BAME ethnicity might be more negatively

impacted proportionally as younger 'self-payers' in recent rent discussions and strategies. They also felt much more impacted by rising cost of energy bills (60% compared to 35%)

Older generation

The retired population is usually the most satisfied across nearly all metrics. There are plenty of positive responses from this generation.

However, 3 key themes transpire from this year's Annual Survey.

1) There are older people who want to downsize to something more suitable (freeing up family accommodation), but they are either not aware of options or do not like them. As noted, before, the dream of a bungalow or a ground floor flat remains the ultimate goal for aspirational downsizers.

2) Those not in sheltered schemes report that often ASB is spoiling where they live.

"A single man from prison was moved into the flat that adjoins my house. Since he was moved in, I have had to call the police a load of times as he gets drunk and plays his music on full base so loud that my house feels like it is bouncing. He set fire to his girlfriend's clothes in the front garden. He also throws food from his kitchen window into my garden. He smashed his living room windows. He screams abuse and foul language. I am 72yrs and my husband is 78yrs old

3) There is still high satisfaction with older person accommodation (sheltered schemes/supported living) however, compared with last year, there was a noticeable undercurrent regarding unease in relation to the changes to retirement schemes' placement policy. Examples include:

"Moved in 13 years ago was for over 65, perfect for retirement but now it's become over 50s and is not as good here.

"It's ok, but now putting all sorts of people here. It was supposed to be a self-reliant home now it's becoming a nursing home."

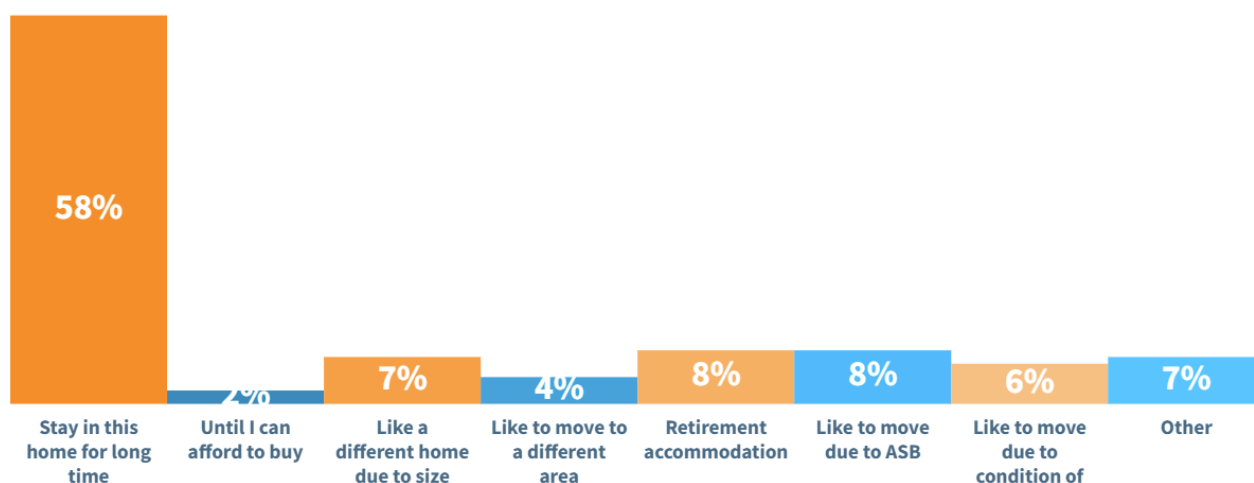
The detail behind the findings

First, we looked at 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:

Question: How would you describe your current renting situation?



From the data, we are able to share the following findings:

1. As expected in social housing, the most common answer is that tenants plan to stay in their existing home for a long time. This is a positive outcome to see.
2. Although, at 58%, this is a fall from last year which recorded 64%. It is important to note that not everyone views their home as their long-term choice.
3. 15% of respondents said they wanted to move owing to ASB and unsuitable conditions of the home.
4. 11% reported wanting to move owing to the size of home or location which is consistent with last year's Annual Survey findings.
5. Similar to last year, there were very low levels of *'just renting short term until I can afford to buy'*. We noted that generally buying a home is not seen as financially realistic at all in the current market. For some, it's also not desirable due to the adaptations and support services that social housing offers.
6. When we examined comments in 'Other' there was significant response volume from people not in permanent accommodation like hostels etc, so they didn't feel able to comment on long term plans. Going forward we will look to create enhanced question options to capture their views more clearly next year.

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

1) Wanting to move due to ASB issues

Note: This topic brought by far the most numerous and detailed comments. Some were very long and distressing. Strong feeling from some tenants of ASB not being taken seriously.

"Noisy, drunken residents, loud music."

"Tenant up to her eyes in cannabis, aggressive and will fight. Noise every day...don't spend a lot of time in my home...can't wait to move. Antisocial laws should be a lot better than what they are at present. People have to move because of antisocial behaviour of others, and this needs to change."

"There's drugs, antisocial behaviour, people shouting, rubbish everywhere it's an embarrassment to live here."

"I've had trouble with young people throwing eggs at my flat. Two weeks ago, they threw a trowel at my window."

"The area has serious issues with drug dealing, prostitution, fly tipping and large gangs of men hanging around the street. It feels very unsafe."

"Harassed by neighbours. Landlord refusing to act and fails to keep proper records."

"Awful, we're overcrowded and a baby on the way. Also having issues with noise from neighbour, dog barking all hours in morning and throughout day. Loud music and tv constantly, you can hear them having sex etc"

"No support from landlord in dealing with anti-social behaviour."

"A single man from prison was moved into the flat that adjoins my house. Since he was moved in, I have had to call the police a load of times as he gets drunk and plays his music on full base so loud that my house feels like it is bouncing. He set fire to his girlfriend's clothes in the front garden. He also throws food from his kitchen window into my garden. He smashed his living room windows. He screams abuse and foul language. I am 72yrs and my husband is 78yrs old."

2) Wanting to move due to housing conditions

As expected, Damp and Mould is a key issue. This is only a brief sample

On-going damp and mould issues.

It has damp issues, mould growing - it's been a nightmare living here.

I have damp throughout my home, and rainwater pours in.

Cold, damp, mouldy in every room. Been complaining since 2018. And still the same. I hate it.

There were also a number of people wanting to move due to general disrepair:

"The building is showing clear signs of neglect and is not being maintained to a clean and reasonable standard."

"I have been waiting a year to have my garden fence mended so that my children can actually use the garden. It's not safe and the fence has injured me with a nail going through my foot."

3) Wanting to move due to size

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 older people wanting to downsize.

Comments about a property being too small:

"I have 2 children boy 12 and a girl aged 10, they are at the age where they shouldn't share a bedroom"

"We are paying £520 a month for a two-bedroom flat, with a 14-year-old girl sharing a bedroom with her 4-year-old sister and 3-year-old brother"

"Currently over-crowded as 4 of us (2 adults, 2 children) in a 2-bedroom flat and I am diagnosed with cancer. Need a bigger home"

"I would like to get a dog to help with my mental health, but no space, and in an upstairs flat"

"My son and I share a double bed in a large room"

Comments about a property being too big:

"I have a home more suited to a family, than a single person. Like a smaller property"

"I live in a large property, but I am single occupier"

"Looking to downsize to a bungalow due to ill health"

"Suitable but need ground floor accommodation now due to disability"

"My needs have changed health wise, I need a bungalow"

"I am registered disabled and although I am bidding for suitable homes I am getting nowhere"

"I am in a 3-bed home, 30 miles from my daughter. My husband is 74 and in poor health. A retirement home would be ideal."

4) Location

It is important to note that there were three key reasons for wanting to move:

- 1) Lack of public transport nearby
- 2) Tenant's desire to be closer to family
- 3) Property is not what they expected

From the responses, we perceived a lot of frustration in understanding the process of how to move or not seeing any progress.

"Would like to move to be near family."

"House ok, but as I'm disabled, and I have family who live in Barry. I would like to move closer."

"I work in the Cynon Valley but due to poor public transport, I spend up to 3 hours a day travelling there and back. I have been on the transfer list for four years."

"No garden, required to help with my mental health. My psychiatrist has written, but no response."

4) Retirement accommodation

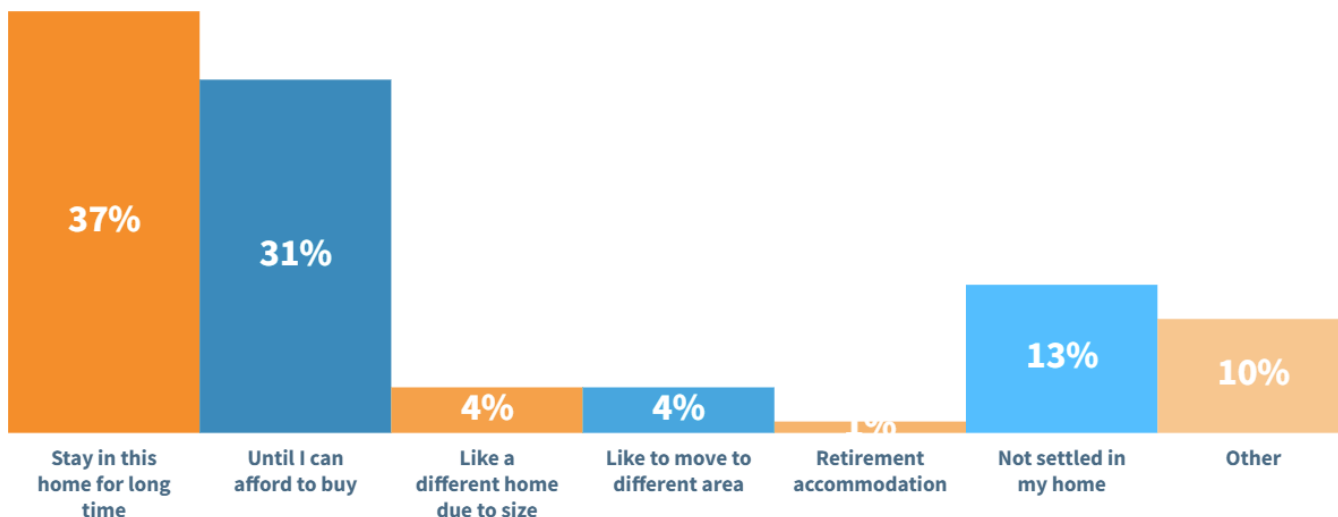
Note: As expected, we received lots of comments about wanting to be in a bungalow or on the ground floor.

There was reasonable satisfaction with older person accommodation. **However**, compared with last year, there was a noticeable undercurrent regarding unease about retirement schemes placement policy changing. Examples include:

"Moved in 13 years ago was for over 65, perfect for retirement but now it's become over 50s and is not as good here."

"It's ok, but now putting all sorts of people here. It was supposed to be a self-reliant home now it's becoming a nursing home."

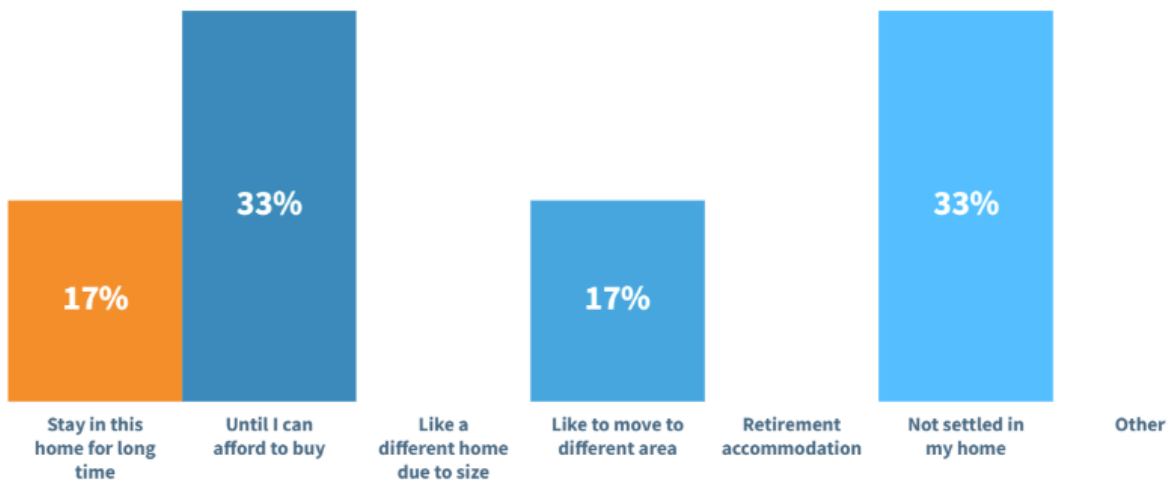
Private Housing Tenants: *How would you describe your current renting situation?*



From the findings regarding private tenants, we were able to make the following conclusions:

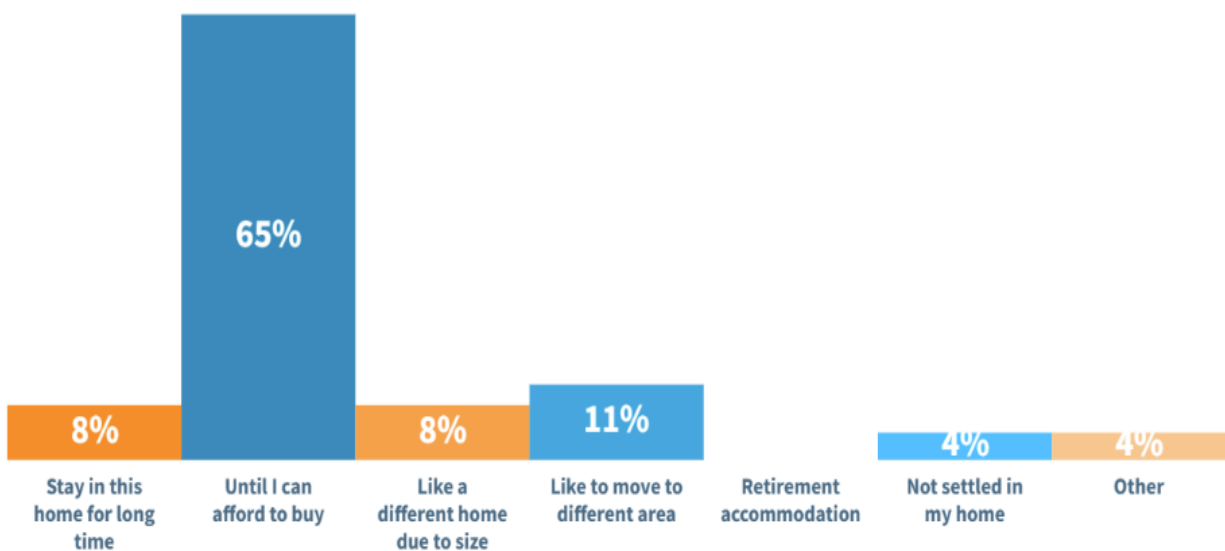
- Only 37% (45% last year) of tenants intended on staying in their home for a long period of time.

- The % of respondents who are renting until they can afford to buy has doubled to 31% compared to 16% last year. This is significantly different from social housing (stable at 2%).
- Almost a quarter of tenants did not feel settled in their home due to size, location or repairs needed.
- The lowest aspiration of private renters to buy was in traditional rural areas such as Gwynedd, Powys, Pembrokeshire, Carmarthenshire etc where local wages and house prices have seen significant divergence. The highest aspirations were in our main urban areas of Cardiff, Swansea and Wrexham.
- Renters who identified as BAME had similar house ownership aspirations as wider response rates but reported significantly lower satisfaction with existing rental conditions.



- The under 30-year-old group really are the biggest subset that view themselves as 'only renting until they can afford to buy'. It was significantly different from older renters who are renting either through lifestyle choice, necessity or where homeownership is no longer a viable aspiration.

Under 30s



Age 45-60



The data reported two key PRS themes:

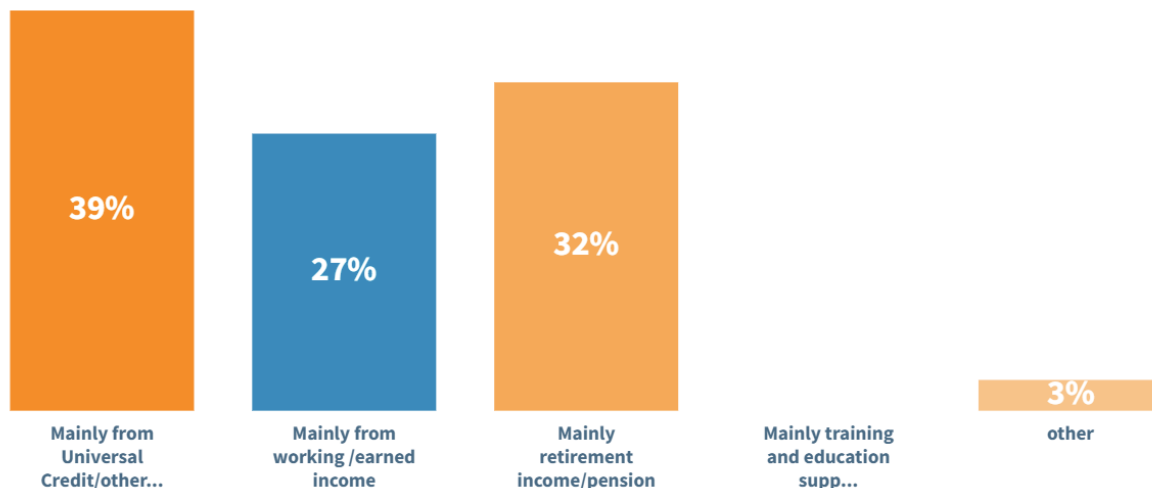
1. Insecurity of tenure. This includes a continued feeling of lack of rights/control regarding rent rises, asking for repairs, evictions if they complained etc.
2. Tenants reported feeling stuck in private housing as they are unable to afford own property, or their rent being too high resulting in not being able to save for a deposit.

Tenants Household Income

This question allows us to understand the income source of the tenant that is responding and enable useful further filtering of other questions on this. Tenants were able to choose one answer to this question with no open comment box.

Social Housing Tenants

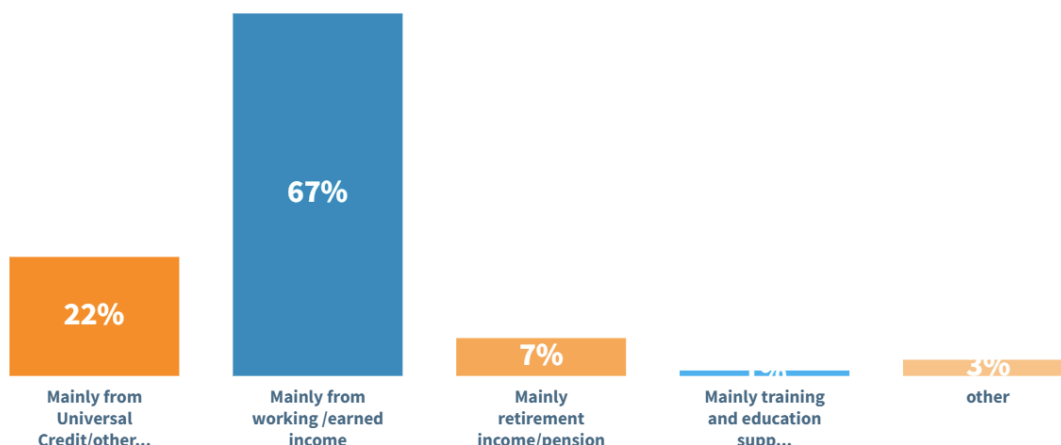
Question: How would you describe your household income situation?



The income breakdown is almost the same compared to previous years and reflects the other data sources used in the rent setting debate recently. This demonstrates that this Pulse survey is reliably reflecting social housing income demographics.

Private Housing Tenants

Question: How would you describe your household income situation?



Again, the breakdown split of responders is very close to last year's Annual Survey. (+/- <1% on each)

There is a significant difference in the PRS v social housing responses regarding income source.

The main source of income for private tenants was earned income (67% compared to 27% social.) This is not a big surprise and reflects how social housing is allocated, compared to private sector, as well as housing type in social housing like sheltered schemes etc.

When comparing how income is generated in social housing households 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. The challenge for private renters is to try to ensure their wages match rent increases.

As expected, age differentiation is a big factor on income type. In social housing, those aged between 18-30 were the most reliant on income generated through working (51%), closely followed by those ages 30-45 (46%) and falling to under 10% for those under 60.

Within the private sector, age plays a significant part in household income.

For those under 30, 88% of responses rely on earned income as main income source. That slowly declines according to age groups, to 68% for 45-60, before dropping to 36% for over 60s.

In terms of respondents who identified as having BAME ethnicity:

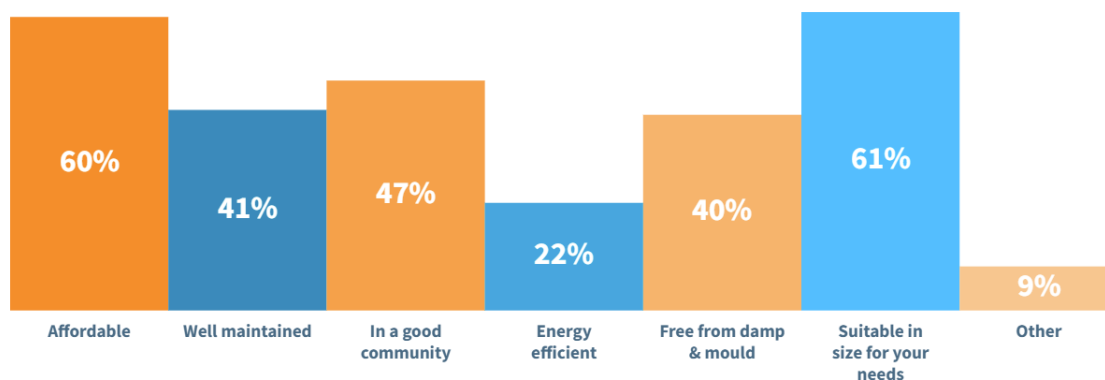
- i) There were no significant differences in terms of household income situation for private renters compared to the whole group.
- ii) However, in social housing, people identifying with a BAME ethnicity were much more likely to be working (46% compared to 27%), with a much lower % in retirement accommodation (9% compared to 32%). We would welcome exploring further if this is typical of social landlord demographics, as it might be that those with BAME ethnicity might be more proportionality impacted as 'self-payers in recent rent discussions.

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

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.

Question: 'Is your home any of the following?'



When compared with last year's Annual Survey, the views about a tenants' home that roughly stayed the same were the following:

- Well maintained (41%)
- In good community (47%)
- Energy Efficient (22%)
- Free from damp and mould (40%)

Response rates that improved:

- Affordable (60% compared to 54% last year)
- Suitable size (61% compared to 53% last year)

We understand that some of these figures are not where the housing sector would want them to be. When we look at the positive uplift in affordability, whilst there was much more positivity overall in retirement living schemes, the comments don't always necessarily support a positive view on the aspect of affordability. The data indicated that it was sometimes the perception by some tenants that private rental sector rates are soaring, so they are thankful to be in social housing.

"I wouldn't be able to afford private rent in this area, so this property is affordable at the moment."

We understand that many of these subjects are interlinked – for example, the low scores in energy efficiency, damp and mould, and properties that are well-maintained, could be addressed under WHQS2, if a swift way forward is found by the sector to overcome some of the funding and logistical challenges.

Note We have not broken down this data down across all 22 Local Authority areas, due to resource constraints. If a member wishes to analyse data by areas, please get in touch.

There were positive comments regarding affordability, mainly in sheltered or supported living.

"It is all I require at this part of my life"

"As a supported living facility, I have the opportunity to socialise with my neighbours or to be in my own flat."

"Excellent home"

"Good landlord, lovely community"

It is exactly what I need and in an area I like living (sheltered scheme)"

It is affordable and it is damp and mould free."

"Can't fault anything, good community but left alone if required"

"I feel safe and like living with two other young people with similar needs to me"

"I have a two-bed house, overlooking the mountains, I really love it here"

"My house is well-maintained and adapted to my needs"

"I have no problems at all with my property. I think I am very lucky"

Well maintained (including Energy efficiency and Damp and Mould)

"Hate that boiler was put next to my bed and not boxed in"

"My home is awaiting repairs requested over 18 mths ago. My house is cold and damp"

"Some of the maintenance work that has been carried out is well below standard"

"I have carried out certain repairs myself at my expense, so as to save time waiting during Covid"

"I maintain the property at my own expense"

"Not in the least energy efficient due to the building being built in 1975"

"Thermal cladding has been applied to the outer leaf of the building's walls, but with the cavity wall insulation having been removed, and no cavity closers above the wall voids, insulation is now poorer than before"

"When we moved in, we were told that the external works (insulation) would start in a couple of months it is now 21 months since we moved in, and the works have not started"

"There are ongoing issues with the PVC windows and doors that make the property negatively energy efficient. The main upkeep is basic, and I tend to undertake almost all repairs myself"

"The property is not energy efficient. Efficiency level D. The house is cold which is hard for my disabilities"

There was, however, evidence of tenants being aware and wanting energy efficiency improvements.

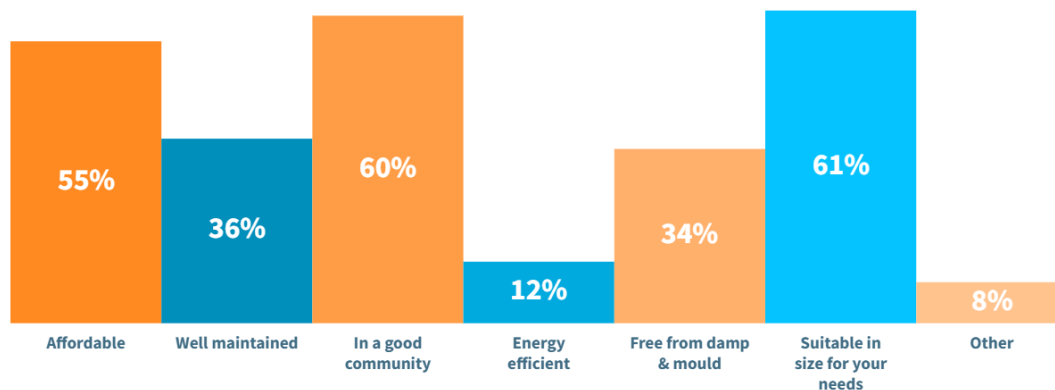
"Would love solar panels"

"More consideration for eco living, maybe solar panels, etc would be good"

"Lots of new builds have solar panels to make them energy efficient. Do you think that solar panels maybe the way to go with older builds like our block to also make them more energy efficient?"

Private Housing Tenants views on their home:

Question: Is your home any of the following?



When compared to last year's Annual Survey, views about a tenant's home that remained consistent were that they were:

- Affordable
- Well maintained

Response rates that improved:

- In a good community (up 6%)
- Suitable size (up 8%)

Response rates that declined:

- Energy Efficient (down from 17% to 12%)
- Free from damp and mould (40% to 34%)

Perception and timing are key on tenant views. Properties don't become less energy efficient in a year, however energy costs have risen sharply, and people are more aware now of heating costs and are not accepting damp and mould

Data collated in the comments on this question can be separated into two categories.

Category 1: Happy private renters

"We love our home Rented it since 1990."

"It's a lovely family home."

"Our house is decently maintained, in a lovely neighbourhood and of a good size. It is definitely not energy efficient, and it's quite expensive. Overall, it's a good home."

"We haven't been in here long enough to judge everything, but it was in good condition and we are pleased with it."

"Lucky to have a positive relationship with the trustees, ensuring the rent stays low for as long as possible. The building isn't maintained to a high standard, but good enough for the rent level."

"We have regular gas and electric safety checks. Any issues we've had were fixed quickly and efficiently. Can't complain so far, very helpful."

Category 2: Unhappy, but feel they have few options

"It IS expensive for what it is, but the housing market just rocketed, and we had no choice."

"Maintenance is adequate, energy efficiency is quite poor and old building makes this more challenging. Issues with rodents. Only an interim rent arrangement for us."

"The flat is very basically maintained with damp and draughts. Would like social housing for long term security in a well-maintained home."

"It's certainly not affordable when rent has gone up 3 times in a year."

"This home was in a very bad condition when I moved in (dirty, bad carpeting, etc.) and is not energy efficient. However, I have been forced to move 4 times over the last 6 years due to owners selling properties."

"I'm in a house of multiple occupancy as I can't afford to rent a flat, despite working 2 jobs."

"Our house is damp and in poor repair."

"Serious damp, mould and other issues. EHO report done but Council haven't enforced any work in over a year. Landlord won't fix."

"My landlord has just increased my rent from 1250 to 1600pcm and I have no choice due to no other rented properties being available. I searched months for this place. This house is on the market, and I will need to move again when it sells."

"Definitely not well insulated."

"It's an old property, which could do with thermal upgrading."

"My home is an old cottage type. It doesn't have cavity wall insulation as single brick thick walls."

"It is a very old house, and the landlord is determined to keep character at expense of efficiency. He has refused to allow me to apply for a Nest grant."

"The heating was £2000+ BEFORE the energy crisis. I have turned off hot water and just sit in the bedroom which has a heater all day."

"There is a huge lack of houses to rent as so many are second homes and holiday rentals locally."

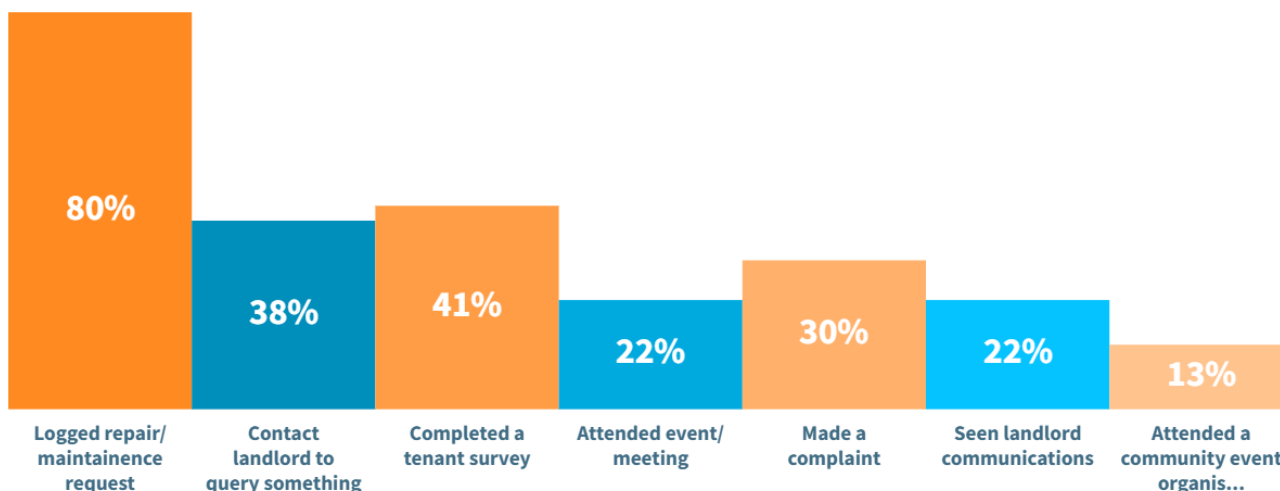
"In the winter it has black mould and in the summer mildew. The landlord has declared himself exempt from having to increase the EPC above an E. I am trapped as I cannot afford £200pcm price hike since all the second homers descended on Pembrokeshire. He might put up rent 1st Dec."

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

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



Compared to our first Annual Survey, in all categories (bar one) there was a positive uplift, which is good to see. The highest uplifts were 'Completing a tenant survey' and 'Logging repairs.' The only drop was in landlord communications.

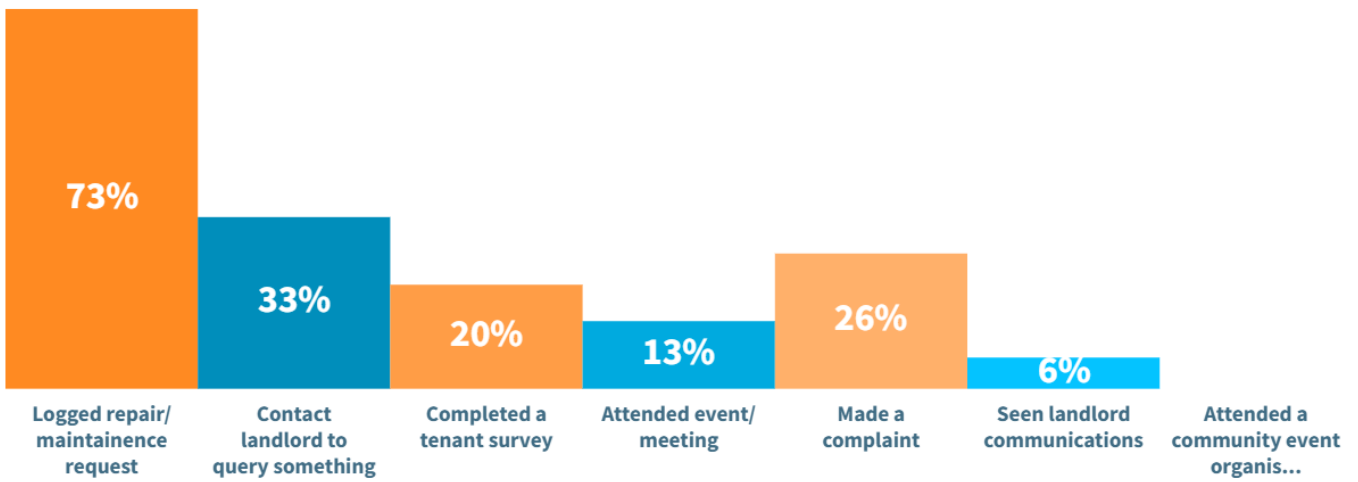
When comparing housing association tenants to Local Authority tenants, the data suggested that tenants living in Housing Associations scored higher in **every** category and therefore are more active in contacting their landlords, attending events and seeing landlord communication.

Comparing to last year, responses from tenants who identified as BAME ethnicity this year, were much more in line with the general response population. Interestingly, an area of concern last year was that only 7% of BAME tenants had completed a tenant survey for their landlord compared to 32% of the general tenant population. This year, this has jumped to 60% compared to 41% of the general response population.

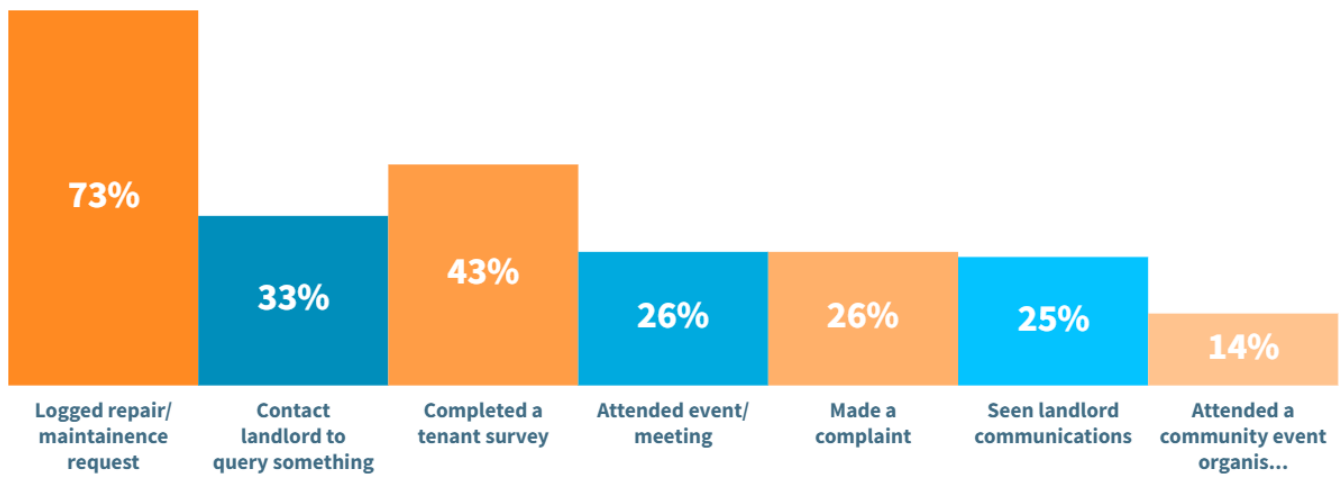
When we analysed age differentiation, it was clear that age played a significant part in engagement. Whilst logging repairs and taking up queries is the same across all ages, there are significant differences when looking at tenant engagement – younger people were less likely to complete satisfaction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

This is an ongoing challenge for the sector and as demonstrated in the following charts, there are two extremes. The sector needs to engage younger tenants better to ensure their voice is heard.

Age 18- 30



Over 60

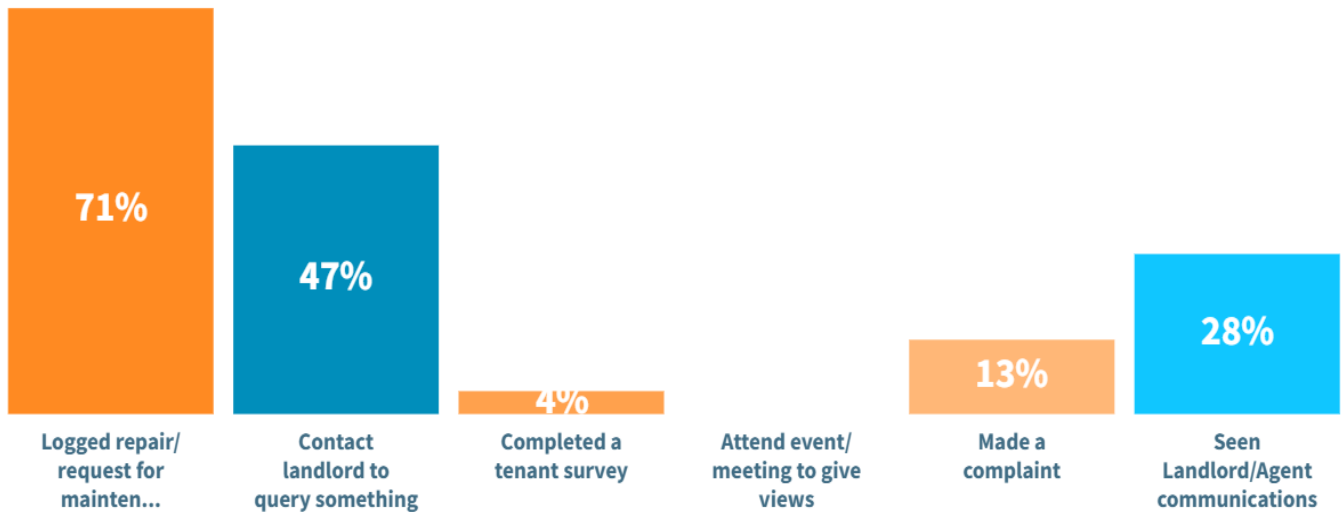


Private Housing Tenants views on Tenant/Landlord interaction

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

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

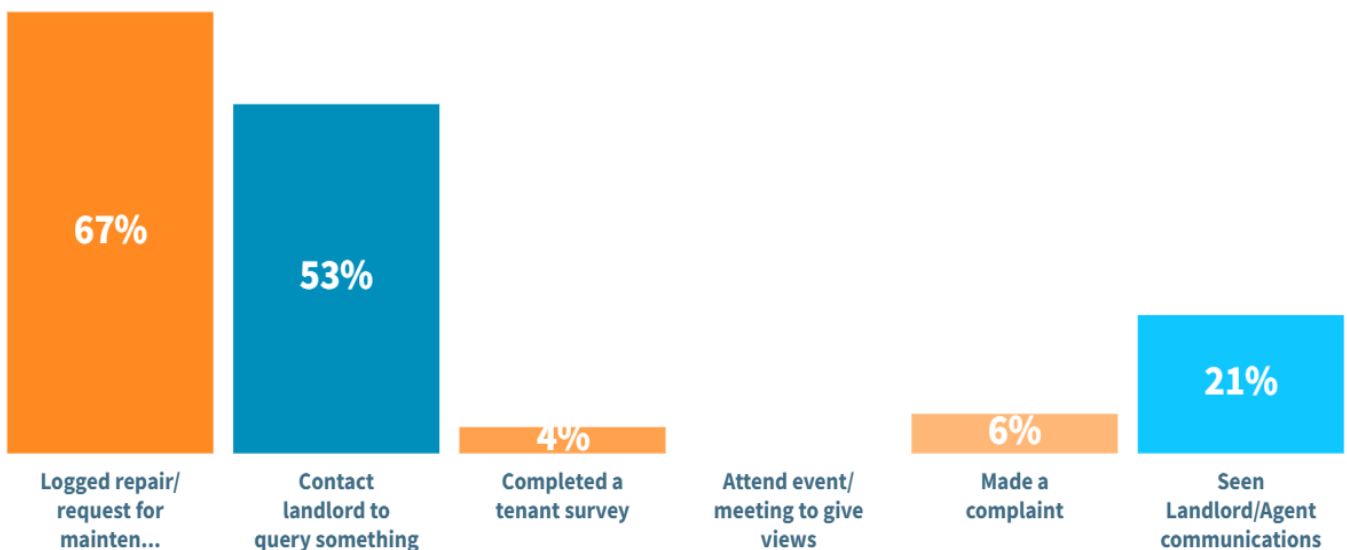
Question: In the last year, what interaction have you had with your landlord?



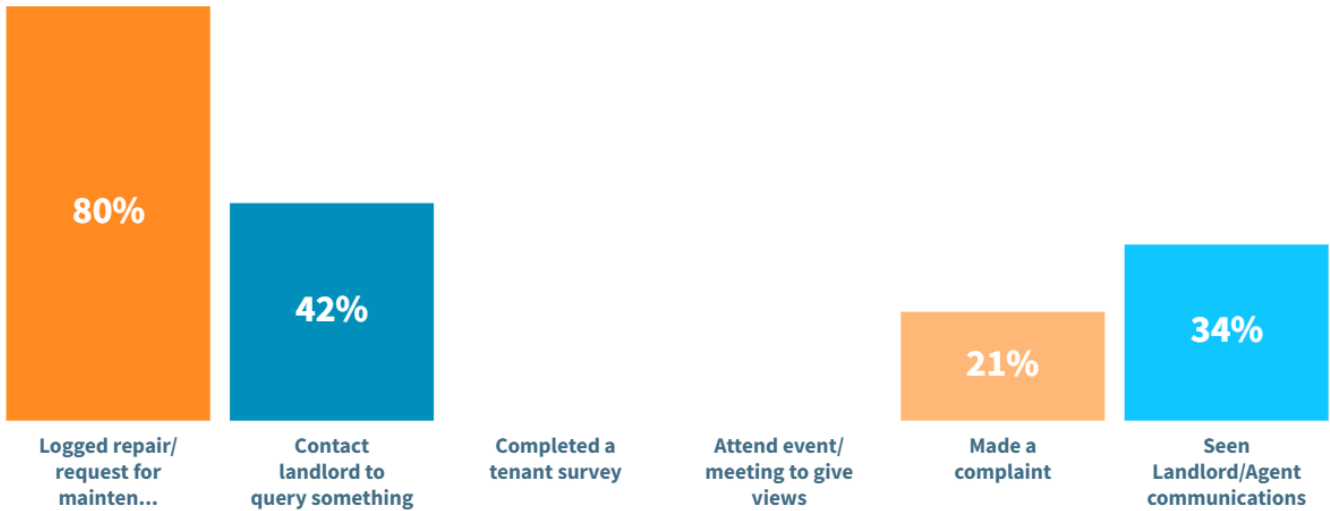
However, one question we wanted to analyse further was:

Was there any difference in communications/engagement for private landlord versus a Letting Agent? Last year there was little in the response. This year, the graphs below indicate that Letting Agents have more tenant engagement, whether that's logging repairs and complaints or tenants seeing landlord communications.

Landlord direct:



Letting agent:

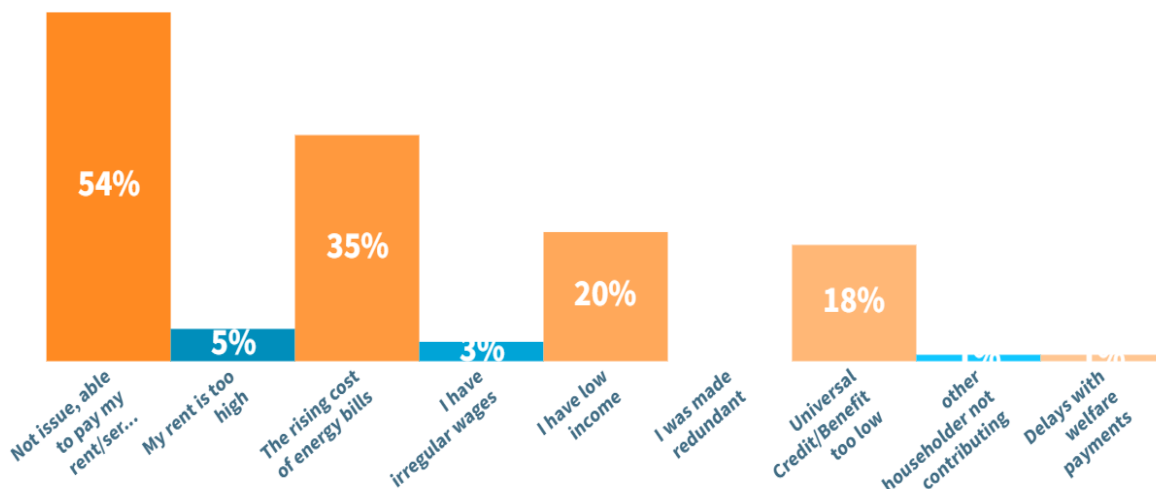


Affordability of Housing

We wanted to look at affordability and the perceived causes of any struggles. Tenants were able to choose multiple answers to this question and were not provided with an open comment box.

Social Housing Tenants

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



The first negative trend we noticed is from those saying they were *not struggling* has fallen from 71% to 54%.

Why is that?

'Rent too high' remains low (5%) and was the same as last year's Annual Survey. What has changed is the rising cost of energy bills from barely registering last year to 35% this year, which is indicative of the current crisis.

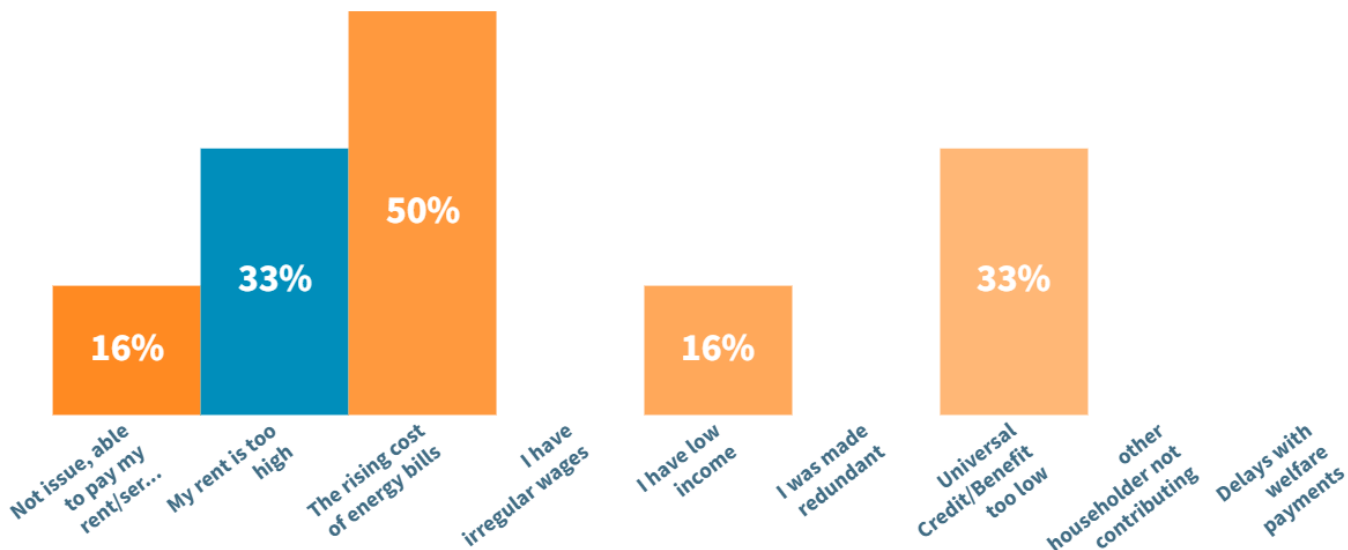
Another response which rose significantly was 'UC/ benefits are too low' rising from 6% to 18%. Energy increases and general inflation/ price rises are having a greater negative impact than last year.

When comparing Housing Association tenants to Local Authority tenants, the data suggested that tenants living in Local Authorities were struggling more. Only 48% of LA tenants said they could afford to pay rent and bills and 41% are struggling due to higher energy costs.

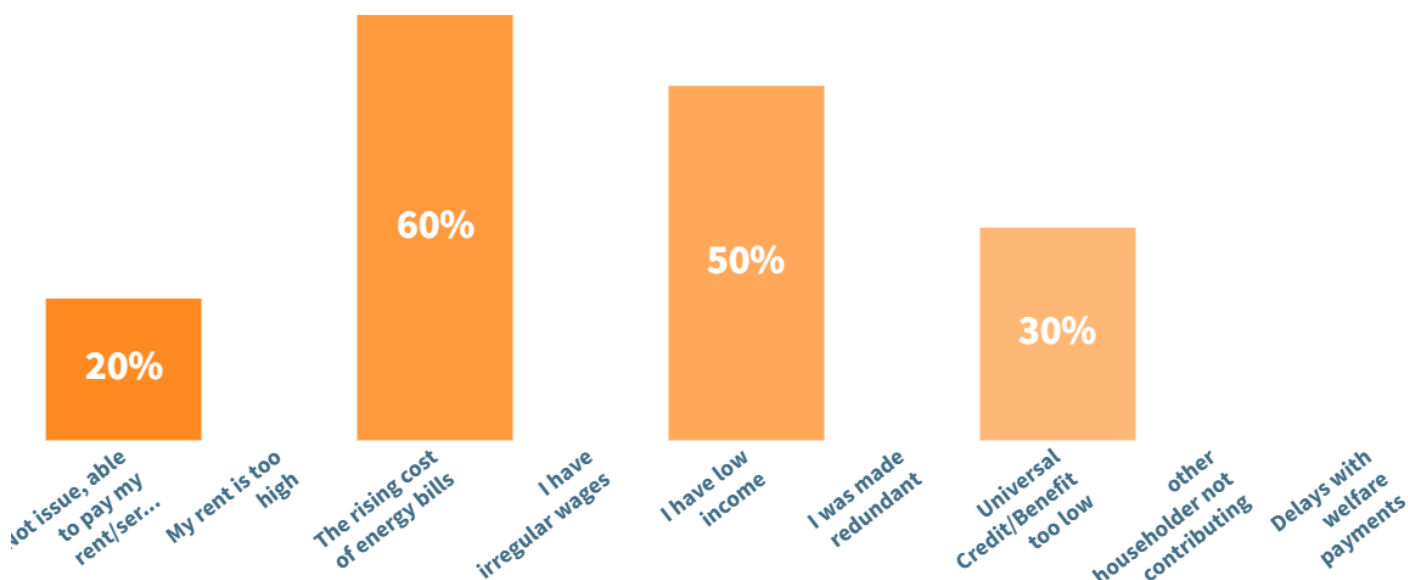
Where we looked at the data in more detail across a number of filters, the 2 sub-sets of tenants who are struggling were very visible:

- 1) Younger people, particularly in Local Authority housing.
- 2) Tenants who identify with BAME ethnicity

Aged 18-30, LA tenant

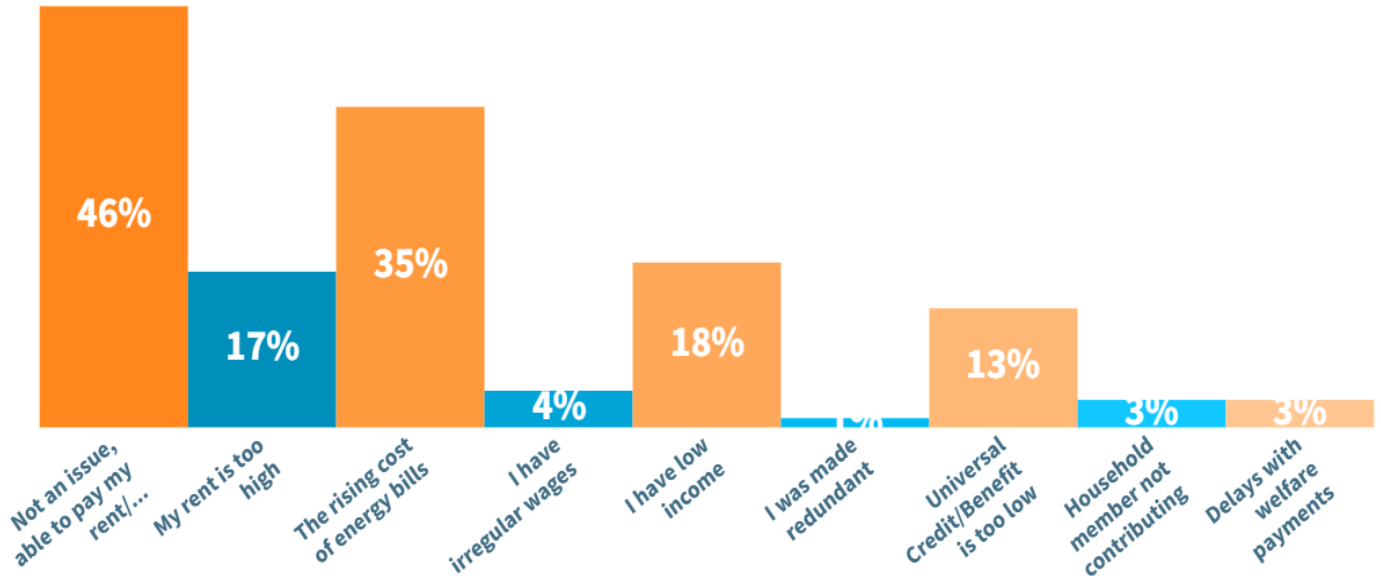


BAME tenants



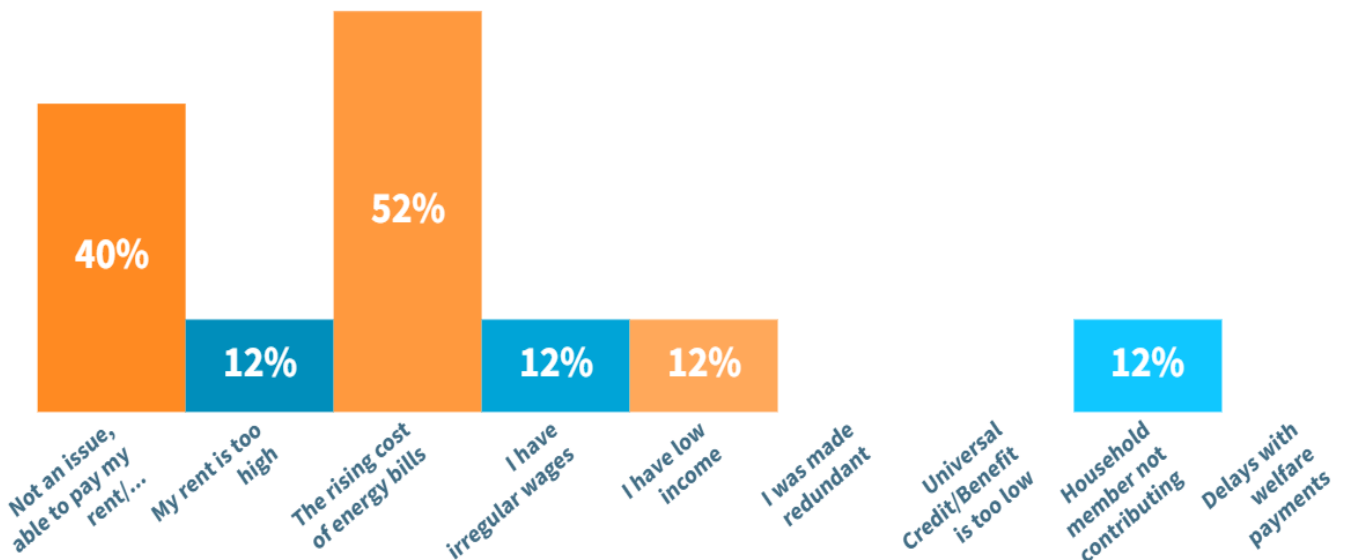
Private Housing Tenant affordability

Question: If you are struggling to pay rent/bills what is causing this?



Like social housing, private renters being able to afford rent and bills has fallen (66% to 46%) However, the number of tenants who responded that their 'rent is too high' has jumped from 9% to 17% since last year. When filtered for BAME ethnicity, this jumps up to 51%. This, compounded with rising energy costs and UC not being sufficient, has created a more concerned renter market.

Similar to social housing, private tenants aged 18-30 are struggling the most



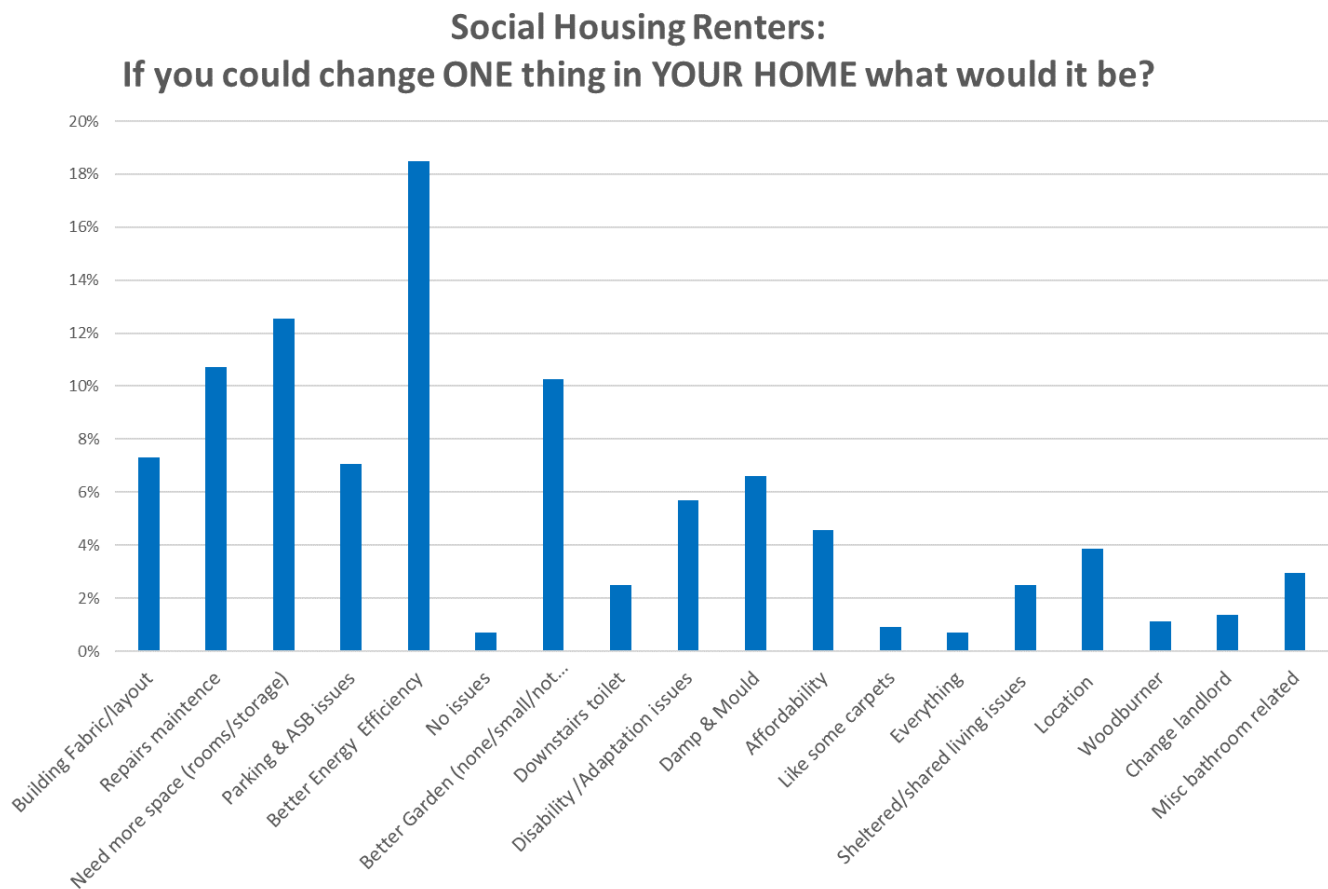
Tenant Perceptions of Home

Question: 'If you could change ONE thing in YOUR HOME what would it be?'

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. This question has historically worked very well at identifying key issues in tenants' homes. Tenants were given an open text box for this question to provide their response.

Part 1: Social Housing Tenants



It not surprising that better energy efficiency came out as the most significant for tenants. This is much higher than last year's Annual Survey.

Topics that tenants ranked the highest as the ONE thing they would change were:

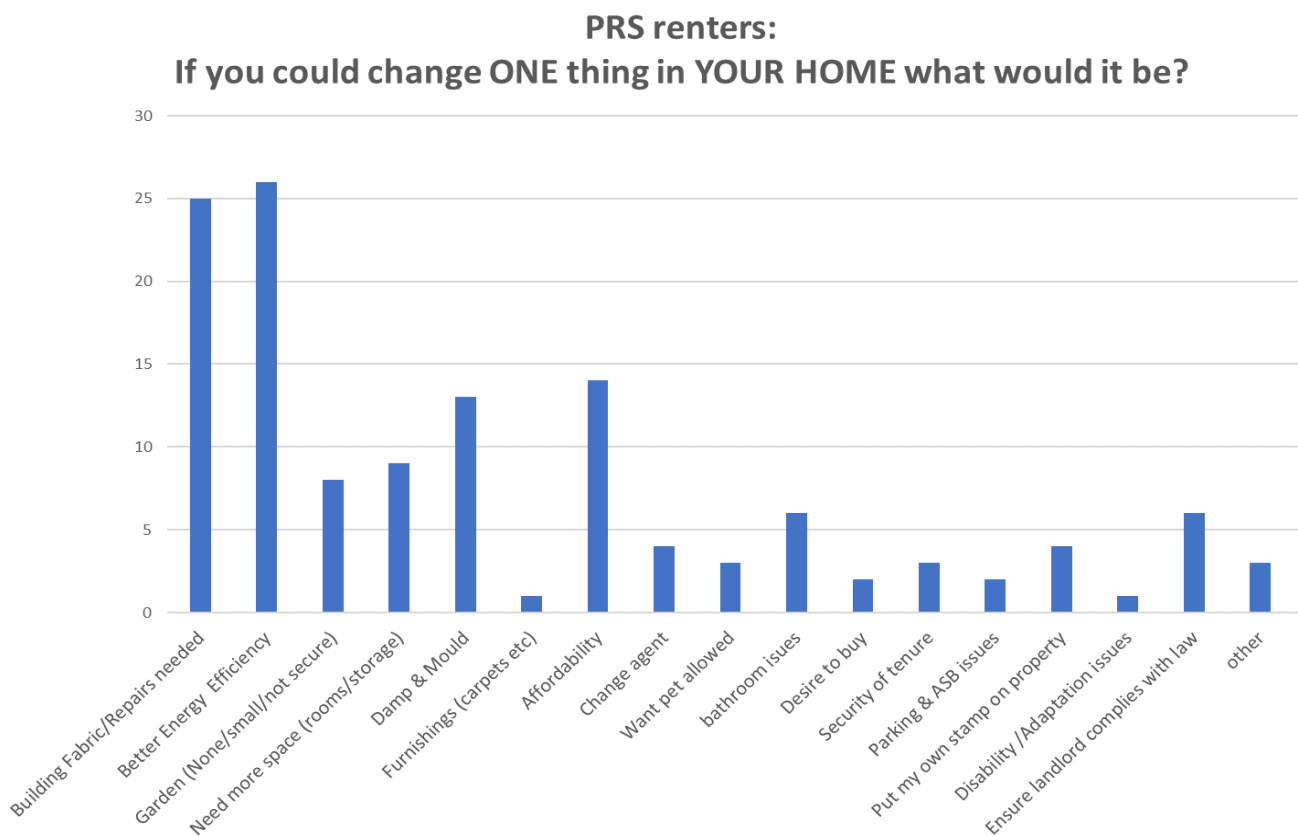
- Better Energy Efficiency
- The desire for more space in home
- Waiting for Repairs
- Garden issues (*no garden, issues with shared gardens or not secure/useable*)
- Building fabric(*mainly window issues and layout*)

- Parking and Anti-social behaviour issues (*mainly helplessness at no action for drug related tenants causing ASB issues*)
- Fix Damp and Mould

Observations from social housing tenants on other smaller categories

- A downstairs toilet and flooring are still desirable.
- 'Bathroom related' responses were almost exclusively significant unhappiness from those with wet rooms for those who don't need one or haven't asked for one. Results contained strong unhappy comments.
- There were frustrations with communal living – changes in sheltered schemes, communal areas not maintained, intercoms etc.
- Owing to the cost of living crisis, there was a significant number of tenants wanting to install a wood burner/log stove. This is easily achievable for home owners, , but social housing rules prevent it. We have heard similar frustrations expressed at other tenant forums and across social media and therefore question if this is fair?

Part 2: Private Housing Tenants – what one thing would they change?



Similar to social housing tenants, the top desire amongst private tenants was to improve the energy efficiency of their property. This is no unexpected given the cost of living/energy crisis. However, affordability themed responses were much higher than from those in social housing.

Top issues were:

- Energy Efficiency
- Building fabric/repairs wanted
- Affordability

- Damp and Mould
- Needing more space

Specific to private housing, tenants' responses were:

- Wanting landlord/agent to be held accountable for breaking laws/best practice regulations (For example: entering the property unannounced, threatening eviction if asked for repairs etc)
- The desire to put my own stamp on property
- The desire to have that better security of tenure

Differences in social housing and private housing tenants

- Social housing tenants have stronger, more specific requests of their landlord. This was concerning repairs, adaptations etc. They are more aware of rights and expectations.
- Private renters' comments are more generic – they want an affordable, safe home that is repaired when asks and is energy efficient and/or free from damp and mould.

Tenant Perceptions of Local Community

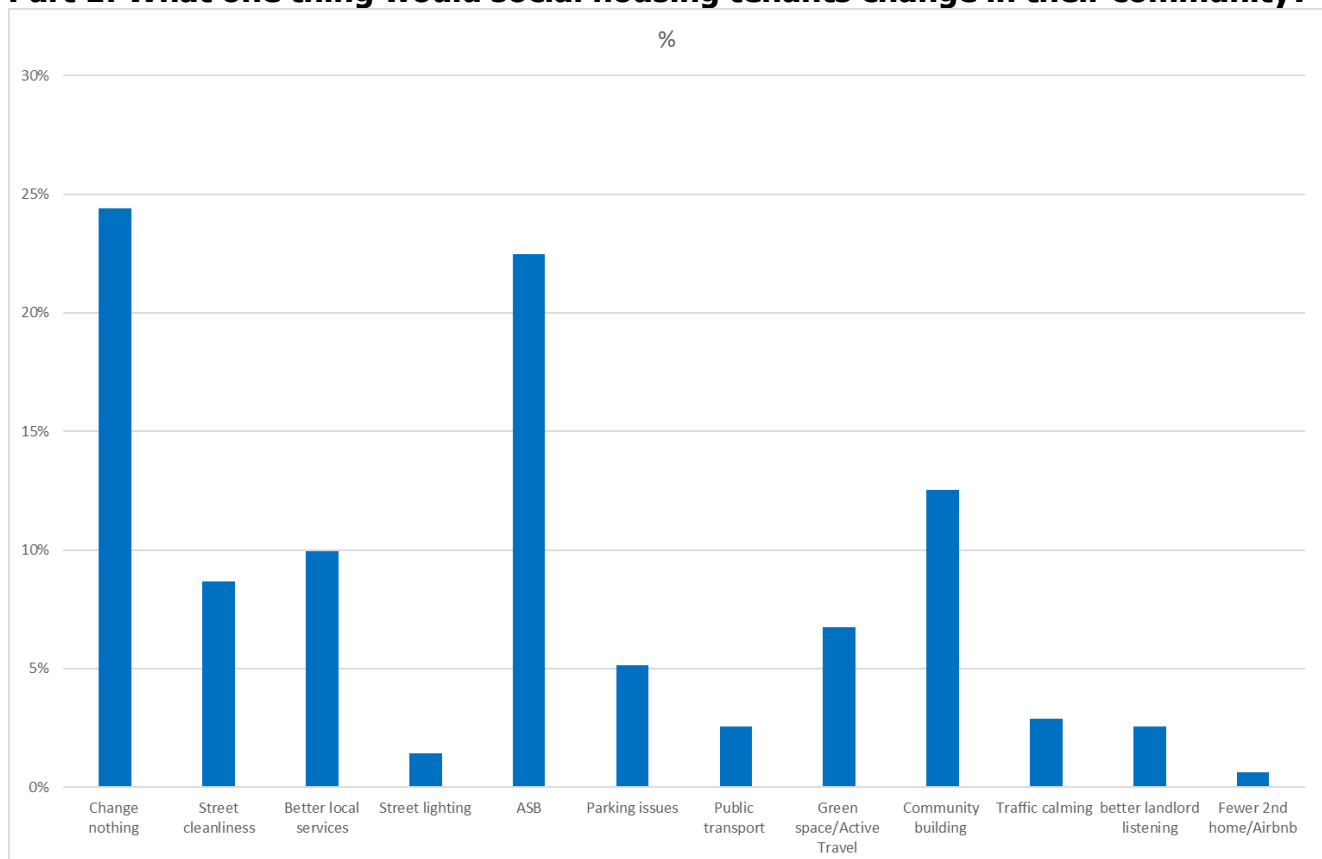
Question: If you could change ONE thing in YOUR LOCAL COMMUNITY what would it be?

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 there is only one thing that they would change in their community, 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.

The 700+ responses were analysed and fell into the following categories.

Part 1: What one thing would social housing tenants change in their community?



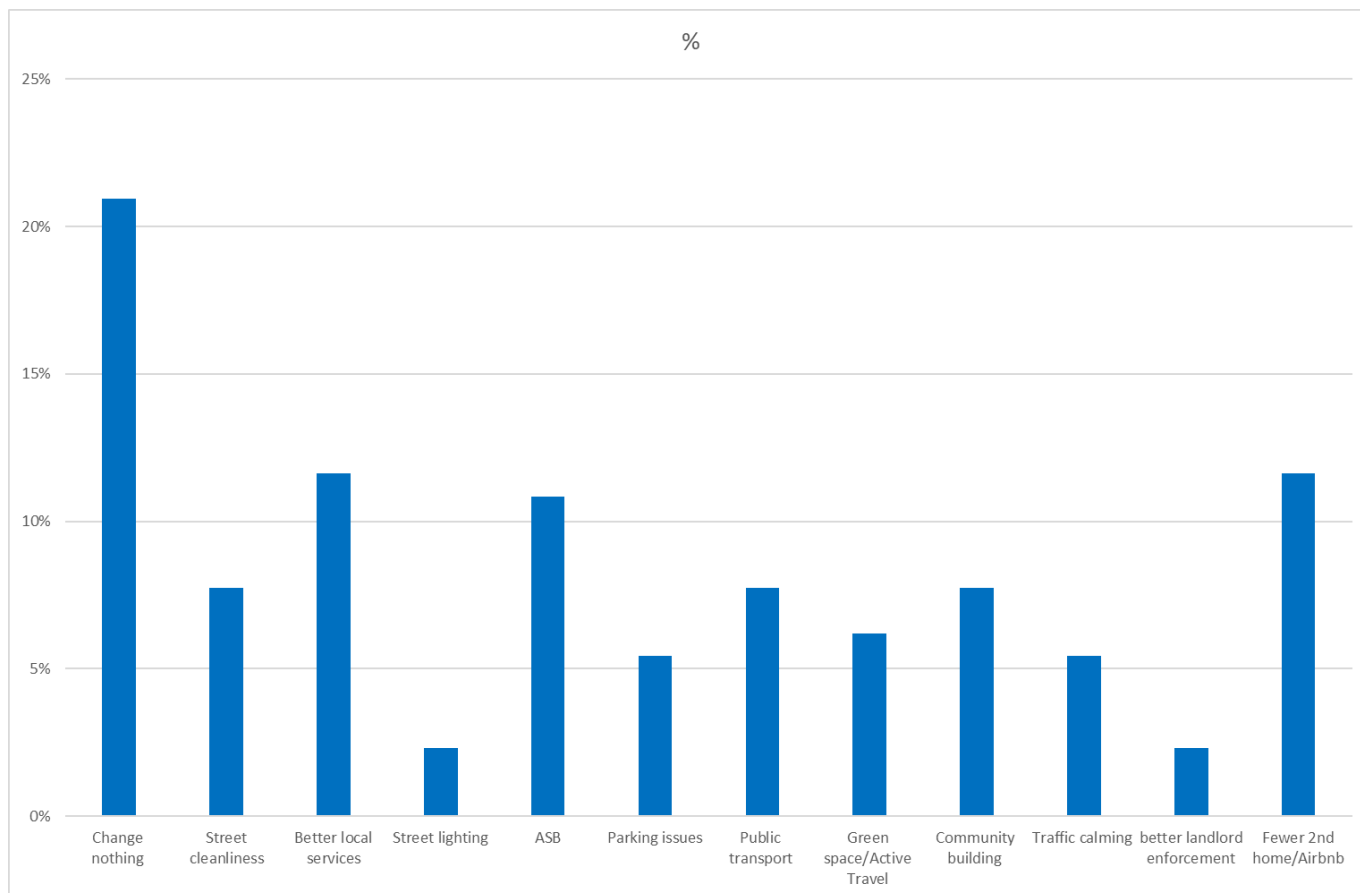
Whilst nearly a quarter of social housing tenants wouldn't change anything in their community, the other 76% identified a number of challenges in their community.

ASB was the highest problem, with frequent references to drugs, noise and problematic neighbours. Some comments might not meet a technical criterion for ASB, but that doesn't mean it is not causing distress to tenants. There were frequent references to feeling helpless and that landlords were either not acting on complaints or making it worse via further unsuitable letting.

Stronger community building is also something social housing tenants want to see. Better local services did not mean that tenants just want closer public services such as medical centres and

community facilities but there were also frequent mentions of loss of wider local services like a local pub.

Part 2: What one thing would PRS Renters change in their community?



Whilst a similar as social housing is happy with their community, the 79% who would change something in their PRS housing were much more diversely spread over a variety of themes than social housing respondents.

ASB concerns didn't feature as highly for private renters compared to social housing sector tenants, which likely provides more housing for more challenging tenants. When it did feature, it was a much more a wider community issue than with immediate neighbours.

However private renters are much more aware and concerned about the impact of second homes/Airbnb as they perceive it impacting on availability and affordability.

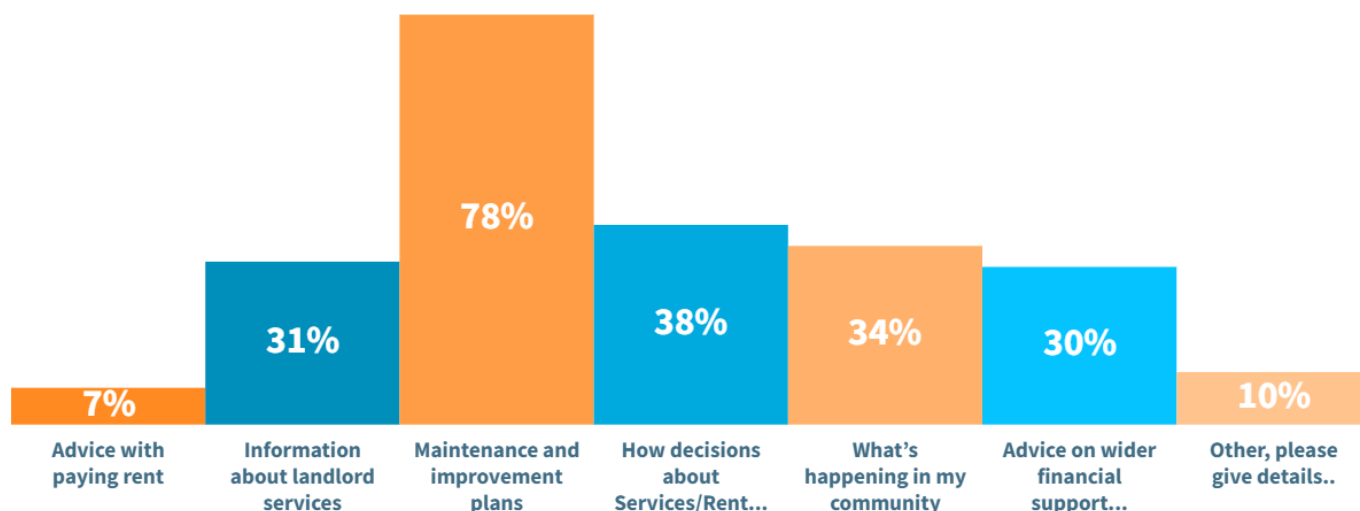
As with social housing tenants – they also want to see cleaner streets, more traffic calming, green spaces and closer public services such as medical centres and community facilities, but like social tenants they also mourn the loss of wider local services like a local pub.

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:

What information from your landlord would be most useful? (select the 3 most important)



This graph illustrates the importance of tenant engagement.

Key findings:

- 1) Nearly 80% of respondents want to know about plans for maintenance and planned works.
- 2) Nearly 40% of respondents want to know how rent and service charges are calculated.
- 3) 30% - 34% of respondents want advice on financial support available, more information about service expectations and what is happening in their community.

"Would be good to know if upgrades are planned and when."

"A better complaints pathway."

"Need to be more 'transparent' about service charges, contracts etc. They should be required to respond to requests under the Freedom of Information Act, which they currently do not."

"We used to have a booklet showing what work was being carried out in certain areas. It was like a 5 year plan, to bring houses up to scratch to an approved standard. Would be nice to hear if any work is planned and for what areas etc."

"Proposed expenditure that would affect me."

"Plans for better insulation."

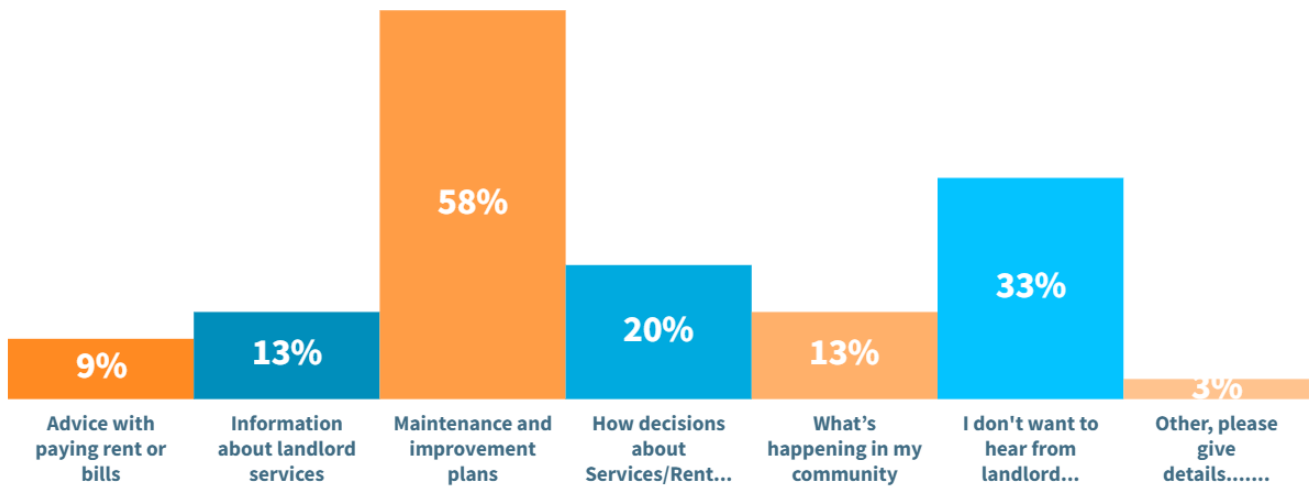
"Policies and procedures to be made more transparent."

"Keeping tenants up to date on everything involving tenants, and involving all tenants rather than a small, select group."

"Explain how services charges are calculated"

Private Sector Renters

What information from your landlord/letting agent would be most useful? (select 3 most important)



Key findings:

- Overall, the most important information tenants felt would be useful to receive, was in relation to maintenance and improvement plans.
- Compared to last year, results were similar with a slight increase in wanting to know more about planned improvements.
- A noticeable difference is there was much more acceptance (over double) to hear and deal with a letting agent compared to directly dealing with a private landlord.
- No significant differences were noticed from those who identified coming from a BAME background compared to general PRS responders.

Note: PRS tenants were given an additional question option that wasn't presented to social 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 33%. Whilst social landlords have a regulatory duty to communicate and engage with tenants, this option should also have been included as a question for social housing tenants.

We have noted this and other improvements for next year's surveys.

In the comments, there was a noticeable feeling from respondents of a lack of rights and helplessness.

- *"I would like to know that it's ok to raise issues, and it won't cause eviction. I would like reassurance about my tenancy."*
- *"I just want to know if the landlord has any intention of making this place energy efficient, or at least a bit warmer and less damp."*
- *"It would be nice if there was any indication that things might get looked at."*
- *"Some kind of time scale about when improvements and repairs are going to be done, if at all."*

Reasons why some tenants would prefer less contact:

- *"I find my landlord quite intrusive and would prefer less communication. Landlord tends to call by and ask why the curtains are closed etc."*

- *"The less contact I can have the better. I contact them if I need anything. The more contact I have with my landlord, the more the house doesn't feel like my home."*

What tenants believe a landlord's priorities should be

Tenants were given a free format box to capture immediate thoughts on what the landlord should prioritise. Again, our aim is to draw out what matters most.

Part 1: Social Housing responses

The comments reflected 6 key themes as follows (with comments from tenants):

1) Maintenance and repairs are still the most important to tenants

- *Ensuring conditions of properties are maintained.*
- *The condition of the stock they control now.*
- *Keeping repairs up to date, owner service charges.*
- *Dealing with the repairs of older properties rather than new builds.*

2) Wanting energy efficient homes is much higher up the wish list than last year

- *Helping to lower energy costs by putting solar panels on houses.*
- *Improving energy efficiency in older stock.*
- *Help reduce energy costs for tenants by fitting warm roofs to houses and underfloor insulation.*
- *making our buildings REALLY energy efficient.*

3) Strong feelings that landlords need to do much more about ASB

- *Making sure tenants are kept safe from anti-social behaviour.*
- *Deal with anti-social behaviour.*
- *Clamp down on anti-social behaviour.*
- *Deal with the drug dealers.*

4) Tenant Voice matters

- *Genuinely listen to your residents and act accordingly. You might not like what you hear, but you need to act.*
- *Listening to tenants.*
- *Greater tenant inclusion in policy decisions and future strategies and plans.*

5) Service charge transparency mentioned a lot more than rent transparency

- *Showing where ALL of the service charge money goes.*
- *Stop charging for services that aren't provided.*
- *Ensure that service charges are explained and are as low as possible.*

6) Allocation policy needs to be understood better

- *Vet people before housing them.*
- *Place people in appropriate homes.*
- *Provide housing for locals over outsiders, as they have contributed to the area and council.*

Note: In 700+ tenant responses, not a single comment featured specifying that landlords' priority should be building new homes. The sector should improve communicating any benefits to existing tenants of new homes.

Part 2: PRS Tenants views on Landlord priorities

Where PRS renters are similar to social housing renters:

- Maintenance and repairs
 - As you would expect, repairs and maintenance featured strongly, but we noticed that compared to social housing, comments were frequent about the need for PRS landlords to **keep doing** repair and refurbishment work after the property is let.
 - *Maintaining the property to at LEAST the same standard throughout tenancy if not improving.*
 - *Keep it in habitable condition.*

- Energy Efficiency

Making the building more energy efficient

Specific PRS themes on what landlord priorities should be:

- Affordability

*Need to keep rent affordable.
Rent at a reasonable level.*

- Security of tenancy

*Not selling.
Ensuring long term tenancy.
Secure tenancy.*

- Enforcement of law and regulations

*Adhering to the Renting Homes Act policies being put in place by Welsh Government.
Upgrading the property to current energy requirements and building regulations.*

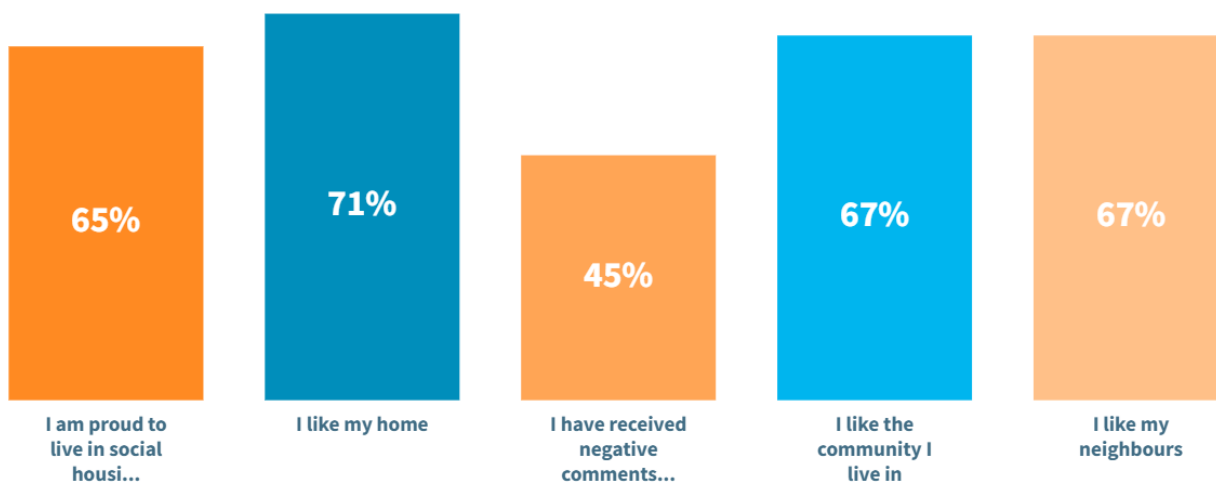
What PRS tenants did not comment on in any noticeable numbers was:

- Landlords tackling ASB
- Tenant Voice
- Service charge transparency
- Allocation policy

Which of these do you agree or disagree with?

The aim of this question was 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



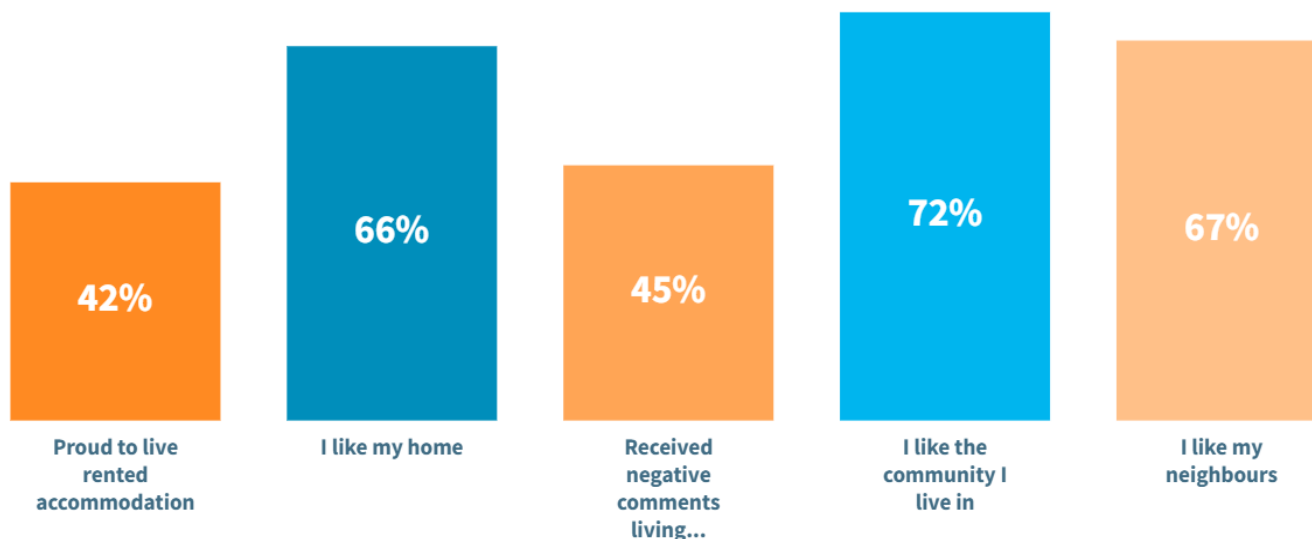
Compared to last year's survey, there was a slight decline in positive responses regarding a few answers. 'Like my home' is down 4%, 'like my community' down 3%, 'like my neighbours' down 2%, 'received negative comments about living in social housing' up by 2%.

When analysing the breakdown, there is no difference noted between Housing Association and Local Authorities.

When looking at people who identify as having a BAME background, no noticeable differences were noted, except a much lower feeling of receiving negative comments for living in social housing (35% compared to 45%)

Age did make a difference in this question; younger tenants were less likely to like their home and less likely to be proud to live in social housing. Polarising this, tenants aged 60+ are more likely to like their home, neighbours and community they live in.

For PRS tenants



When looking at private renters who identified as having a BAME background, there was significantly lower satisfaction in liking their home (31% compared to 66%) but a slightly higher satisfaction with community and neighbours (+4%) compared to all renters.

Age did make a difference in PRS responses. Younger PRS renters were less likely to like their home and less likely to be proud to be renting. They were also less satisfied with community (-7%) and neighbours (-8%)

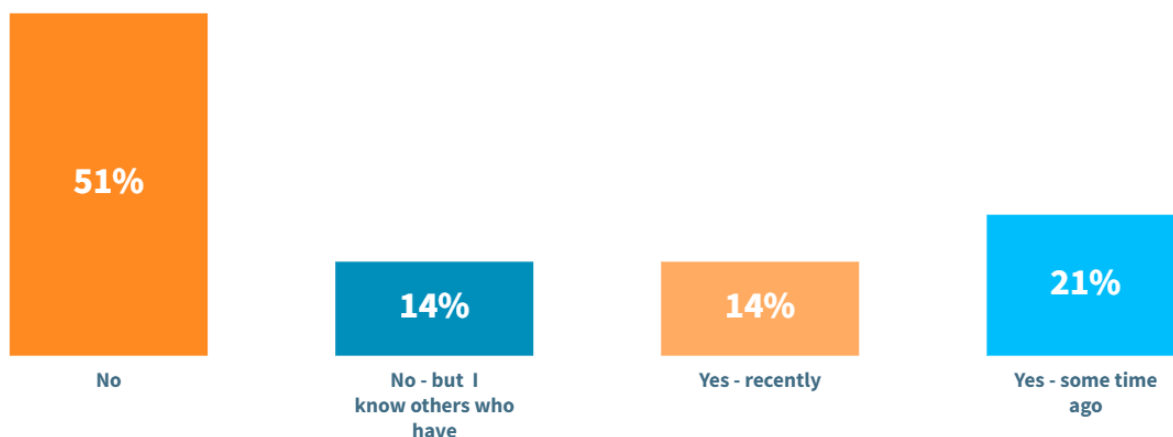
Comparing Social tenants versus private renters.

Social housing tenants tended to be happier in social housing than private renting tenants are to be renting and in their home. Looking at replies in other parts of the survey, social housing tenants talk of tenure security, higher trust in landlord/area, repairs and properties adapted their needs.

The areas private renters were more positive about in their response was the community they live in.

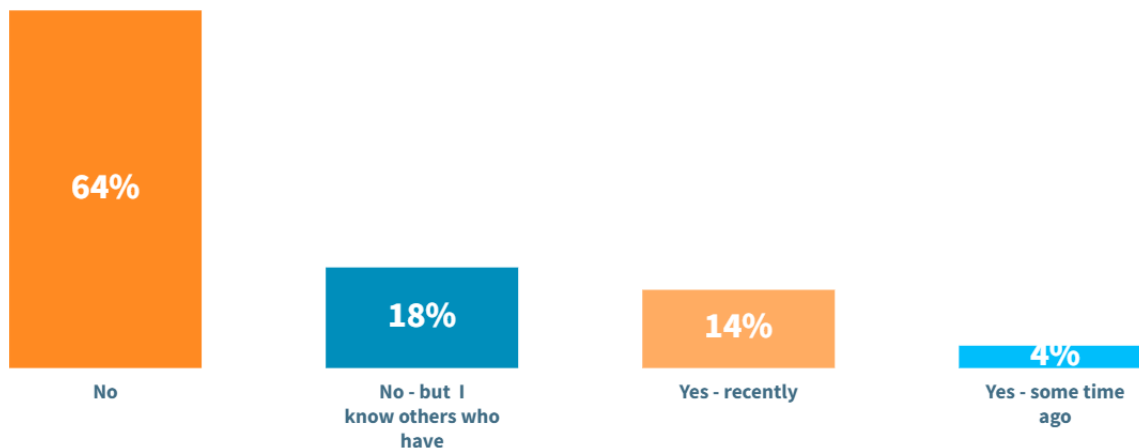
Have you ever received negative comments, threats or felt discriminated as a result of living in social housing/private renting?

Social housing tenants



This question's response had no significant change on last year's survey. As noted previously, when looking at people who identify with having a BAME background, this segment recorded the highest 'No' figure of 80%.

PRS Tenants



In this segment, most negative comments were from the age group 30-45. No comments section was offered for this question. However, looking at comments from this age group in other responses this age group were more likely to be subjected to comments like 'What?...still renting?'

They felt they are perceived as unsuccessful for not being on the property ladder. Older 60+ tenants are likely to be renting privately as a lifestyle choice.

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

Note: Last year, this question was only asked of PRS Tenants as they were only type of renters where a recommendation might make a difference to others. Based on feedback, we also asked social tenants this year.

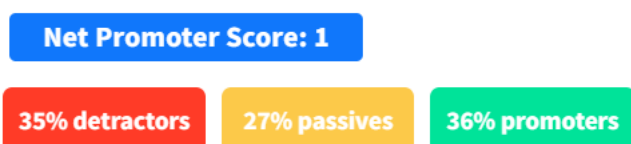
The aim of this question was to understand whether tenants would recommend their landlord to others. They were provided with Doopoll's NPS (Net Promoter Score) tool, which shows a standard 0-10 scale to grade their likelihood of recommendation.

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 consider a good Net Promoter Score.

Their clients include a number of well-known Welsh brands and public organisations.

Part 1: Social housing tenants Net Promoter Score

How likely are you to recommend your landlord to a friend or colleague?



As a whole, Social Housing tenants are fairly evenly split across the 3 categories of negative/neutral and positive. It seems the 2 middle age groups spanning 30—46 years old were the least satisfied.

Segment	Net Promoter score	% Detractors	% Passive	% Promoters
All social housing tenants	1	35%	27%	36%
Local Authority	11	32%	23%	43%
Housing Association	-2	37%	27%	35%
BAME	0	30%	40%	30%
Age				
18-30	7	35%	21%	42%
30-45	-12	42%	27%	30%
45-60	-7	40%	24%	34%
Aged 60+	10	29%	30%	39%

The overall NPS was higher for Social Housing Tenants than Private Renting. There is little difference between age groups and tenure types. The most significant difference is in the age segment 18-30. In our results, younger social housing tenants are some of the most positive in their view of their landlord, whereas younger PRS renters are by far the most negative.

Part 2: Private Renter Net Promoter Score

Net Promoter Score: -10

(This is an improvement on 2021 where NPS was -28)

The 'All PRS renters' result is broken down as:

41% detractors

26% passives

32% promoters

When we break it down further, we 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.
- 3) Age of renter is significant in the response.
 - a. Younger renters continue to be most least likely to recommend their landlord.
 - b. Older private renters' NPS has improved by a section of detractors moving to passive (neutral) from negative.
 - c. Some age 30-45 have uplifted their views from neutral to positive.

Segment	Net Promoter score	% Detractors	% Passive	% Promoters
All PRS tenants	-10	41%	26%	32%
Landlord direct	15	30%	25%	45%
via Letting Agent	-36	53%	27%	18%
Age				
18-30	-50	54%	40%	4%
30-45	-5	42%	19%	38%
45-60	-4	42%	18%	39%
Aged 60+	12	25%	37%	37%

We have to ask, 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 on the topics above.

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

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

Findings in this section were insightful but didn't pass our 'statistically significant' controls.

Conclusion

This report has explored the views of tenants from across Wales and across different tenure in social housing and the PRS sector.

It has investigated tenants' perceptions and attitudes towards their homes, their communities and the issues that matter most to them. The key findings are highlighted at the beginning of the report.

However, having read thousands of lines of comments there were a number of key themes that tenants feel frustrated about or felt weren't being addressed.

These were:

- 1) Many issues are interlinked such as damp and mould, affordability, and energy efficiency. We urge the housing sector to accelerate the planned retrofit of housing.
- 2) Equally there is real concern about lack of action on ASB tenants who make life unpleasant for others. We urge The Housing Sector and other stakeholders to carefully consider root causes and to implement appropriate measures on prevention and action on this matter.

Younger PRS renters want better support and advice in knowing their rights and improving the tenant /landlord relationship.

Next Steps for TPAS Cymru and you, the reader

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 have been sent a copy ahead of publication.
- 2) We will be running free member briefing sessions with tenant and housing staff to discuss the findings of the reports. Look out for details on our website and across our social media channels.
- 3) We will be sending this report to key decision makers across the Housing Sector, including Welsh Government, Members of the Senedd (who have an interest in housing), Housing CEOs and Heads of Service, asking for their consideration and action.
- 4) TPAS Cymru will identify opportunities to present and discuss the findings within the sector and media to ensure stakeholders absorb and act on the report.
- 5) We are grateful to Welsh Housing Quarterly who will feature this report in their next edition.
- 6) In addition, based on other TPAS Cymru reports, it is 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 hear your views on this report and especially what actions you hope to take, in response.

Notes:

- 1) Media enquiries; contact David Wilton drw@tpas.cymru / 07896871164
- 2) To view our other Pulse Reports please visit www.tpas.cymru/pulse
- 3) To learn more about Tenant Pulse, and request promotional material for awareness building, contact: eleanor@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 shape the future of housing.

We would also like to thank the Welsh Government for part funding TPAS Cymru as an organisation and to Wales & West Housing for the year-round lead sponsorship.

This is now the second Annual All Wales Tenant Survey on tenant attitudes to home living and their relationship with their landlord. We acknowledge that continued refinement and improvement is possible going forward, and we 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. Its aim is to:

- 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 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

Appendix A: Questions

<p>1. So that 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 Cartrefi Conwy Caredig Clwyd Alyn Coastal Housing Cynon Taf HA Grwp Cynefin Hafod Linc Melin Homes Merthyr Valley Homes Monmouthshire Housing Association Newport City Homes Newydd HA North Wales HA</p>

	POBL Group RHA Taff Housing Tai Calon Tai Tarian Trivallis United Welsh Valleys 2 Coast Wales & 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
4. What is your age?	18-30 30-45 45-60 60+ Prefer not to say
5. Do you consider yourself as BAME (Black Asian Minority Ethnic) background?	Yes No
6. How would you describe your current renting situation?	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
7. How would you describe your household income situation?	Mainly from Universal Credit/ other Welfare payments Mainly from working/ earned income Mainly retirement income/ earned income Mainly training and education support payments Other
8. Is your home any of the following? (feel free to add comments)	Affordable Well maintained In a good community Energy efficient Free from damp and mould Suitable in size for your needs Other
9. In the last year, what interaction have you had with your landlord?	Logged repair/ maintenance request Contact landlord to query something Completed a tenant survey Attended event/ meeting

	<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>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 landlord's 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>
17. How likely are you to recommend your landlord to a friend or colleague?	NPS tool with a scale of 1-10