

# PUMED ADRODDIAD BLYNYDDOL PWLS TENANTIAID

*MEWNWELIADAU GAN DENANTIAID LEDLED CYMRU*

December 2025  
[tpas.cymru/pulse](https://tpas.cymru/pulse)

Olivia Browne  
David Wilton



Ariennir yn Rhannol gan  
**Lywodraeth Cymru**  
Part Funded by  
**Welsh Government**

NODDWYR LLAIS Y TENANT

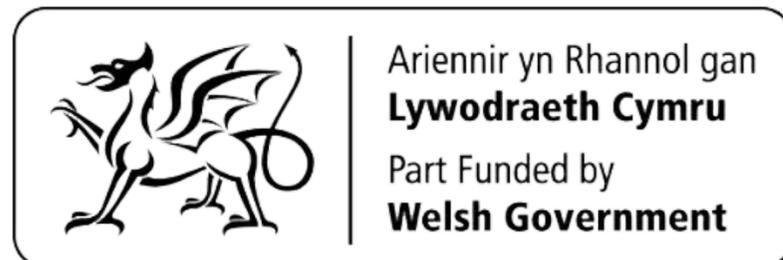


# FIFTH ANNUAL TENANT PULSE REPORT

*INSIGHTS FROM TENANTS ACROSS WALES*

December 2025  
[tpas.cymru/pulse](https://tpas.cymru/pulse)

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TENANT VOICE SPONSOR



# Amdano Pwls Tenantiaid

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# About Tenant Pulse



- Tenant Pulse is Wales' national tenant voice platform, led by TPAS Cymru.
- Database that has 1500+ tenants across tenures
- It enables tenants to share experiences and priorities anonymously and consistently.
- Findings are used to inform Welsh Government policy and decisions and landlord practice.

# Tenant Pulse Advisory Group (TPAG)



## Consisting of 120 social housing and private rental tenants

Representing a range of ages from 18-60+, range of tenures, socio-economic backgrounds. Also represents all 22 Local Authorities in Wales.



## Providing feedback, suggestions and a critical friend

Supports TPAS Cymru to ensure that our Tenant Pulse platform is led by the tenant experience and accessible to all and asks the right questions.



## Proofreading and guidance of Tenant Pulse materials

Tenant Pulse surveys and materials are proofread and approved by TPAG members, to ensure that our work is accessible and relevant.

# Hearing the Tenant Voice in Wales



TPAS Cymru is the tenant engagement organisation for Wales.

**We believe tenants from both the social and private housing sectors need their voices heard by their landlords, policymakers at all levels, and each other.**

Tenant-landlord engagement across Wales varies in its success. However, it is also vital that tenant voices are heard at a higher level within Welsh Government, with politicians, statutory bodies and policy makers.

We utilise various methods to enable tenants in Wales to be heard, shape and influence housing in Wales.

This guide offers an overview of how TPAS Cymru, together with tenants, ensures that voices from diverse cultures and backgrounds across Wales are heard.

TPAS Cymru offers a diverse range of ways for tenants to get their voice heard, and this means that it is open and inclusive of all tenants to engage in a way that suits them and that those who shout the loudest are not the only ones heard. We want our work and tenant voices to reflect the entire tenant community in Wales.



- Tenant Pulse
- Tenants shaping our work
- Tenant Voice Cymru Forum
- Tenants Networks
- Online listening
- Case work
- Regular meetings with WG officials

# Newydd Blwyddyn hon:

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# New this Year:



- **New look/ 'Matters'**
- **Context + Methodology section**
- **More language options**
- **Focus Group opt-in**
- **Prize change**
- **References to wider research**

# Ennillwyr y raffl :

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# Prize Draw winner:



ANN PATES, PONTYPRIDD

**Newydd  
Blwyddyn  
hon:**

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**New this  
Year:**



**Cartrefi  
Cymunedol  
Cymru**

**Community  
Housing  
Cymru**

# Newydd Blwyddyn hon:

# New this Year:



**HEB EU GWELD. HEB EU  
CLYWED. TAN-  
GYNRYCHIOLEIDDIOL.**



Rydyn ni'n gwybod mai dyna sut mae llawer o denantiaid sy'n perthyn i un, neu lawer, o grwpiau sydd heb gynrychiolaeth ddigonol yn teimlo o ran ymgysylltu.

**Os mai chi yw hwn:**

Cymerwch ran yn ein Harolwg Pwls Tenantiaid Blynyddol am gyfle i fod yn rhan o grŵp ffocws.



**Ti'n Cyfri.**

**UNSEEN. UNHEARD.  
UNDERREPRESENTED.**



We know that's how many tenants who belong to one, or multiple, underrepresented groups feel when it comes to engagement.

**If this is you:**

Take our Annual Tenant Pulse Survey for a chance to be part of a focus group.

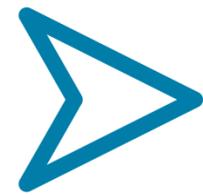


**You matter.**

# Campaign



The survey was sent to our Tenant Pulse database and landlords from across Wales It was also posted in various community Facebook Groups to encourage responses.



- Flintshire Community Hyb,
- Wrexham Notice Board,
- Llandudno Community Hub,
- Cardigan Community,
- Merthyr Tydfil Community,
- Swansea Bay Notice Board

Arwria yn Rhannol gan Lywodraeth Cymru  
Part Funded by Welsh Government

**‘CARTREF HAPUS’  
SUT MAE UN CHI?**

DYWEDYWCH WRTHYM DRWY EIN  
AROLWG.  
OHERWYDD RYDYCH CHI’N CYFRI.

Arwria yn Rhannol gan Lywodraeth Cymru  
Part Funded by Welsh Government

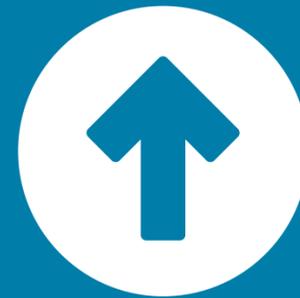
**‘HOME SWEET  
HOME’  
HOW’S YOURS?**

TELL US ON OUR SURVEY.  
BECAUSE YOU MATTER.

# Meta Advert



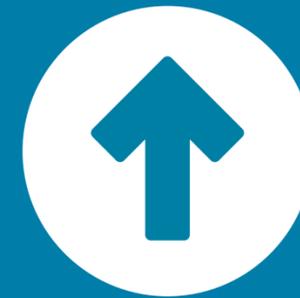
**Our paid meta ad ran for a total of 3 weeks and generated 216 more respondents**



**61,316 Views**



**1,247 landing page views**



**44,017 Accounts Reached**



# Demographic Matters

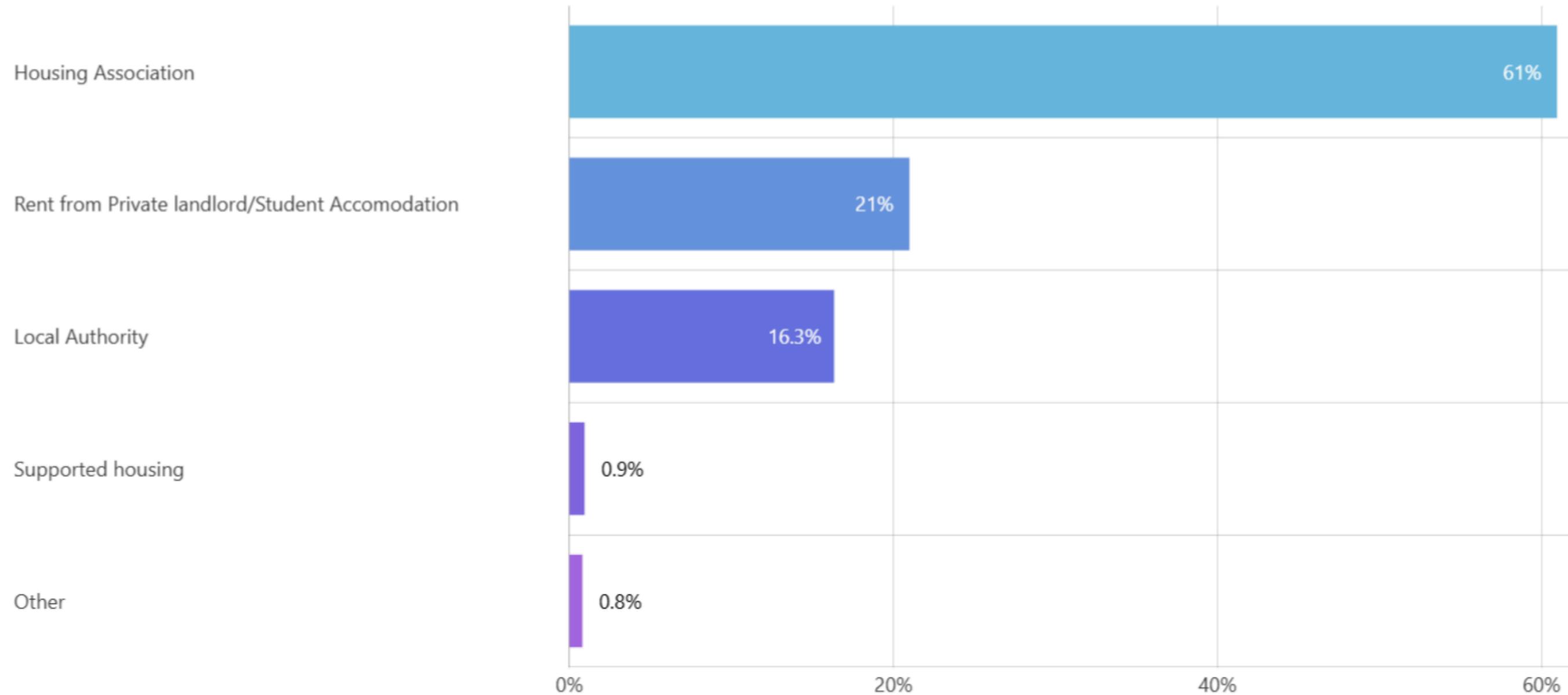


**770**

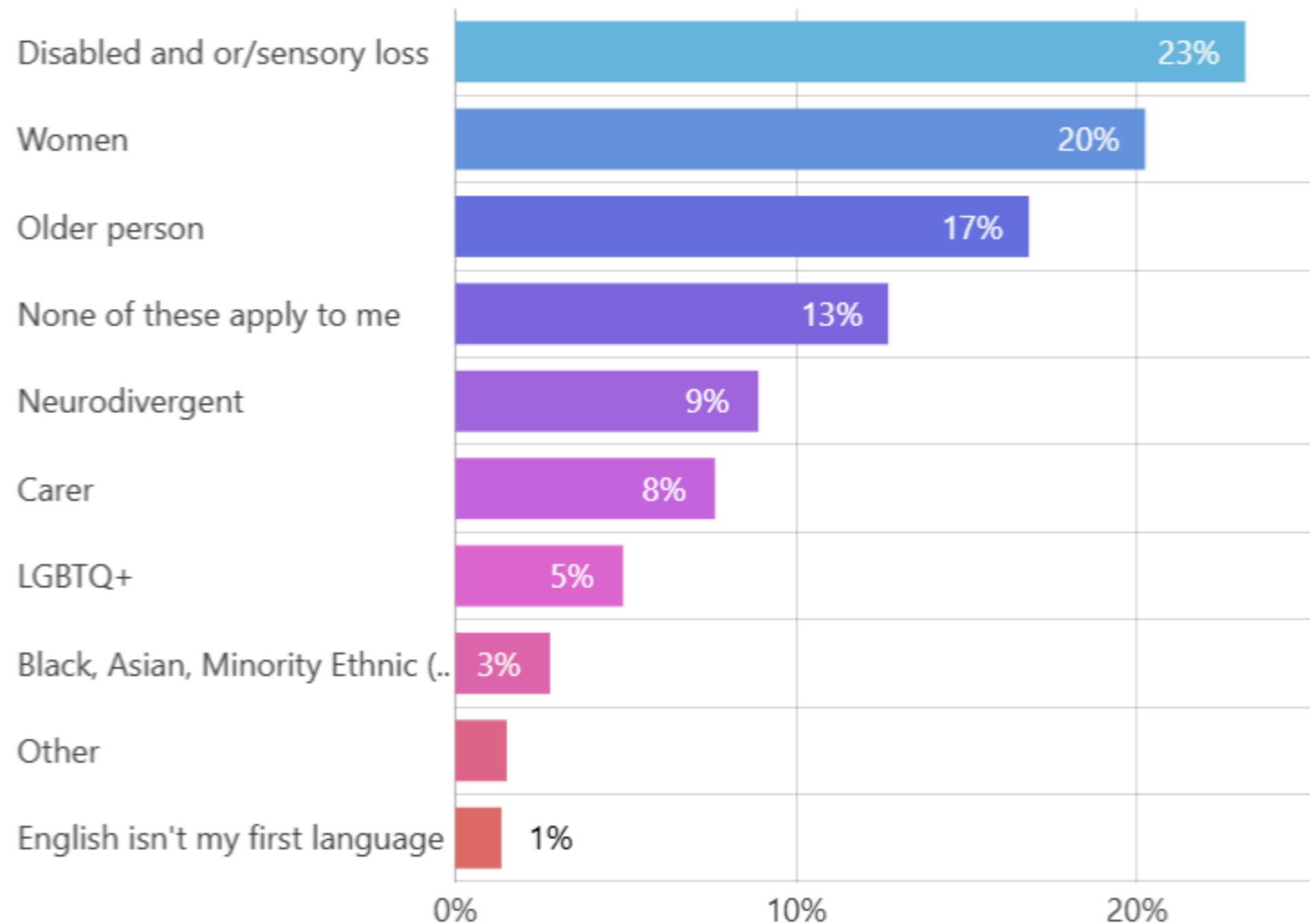
**tenants responded**

- All ages (18+).  
Majority (28%) were 66%+
- All 4 regions of Wales (North, South West, South East, Mid and West)
- Private, Social and Supported Housing renters

# Response in tenure type

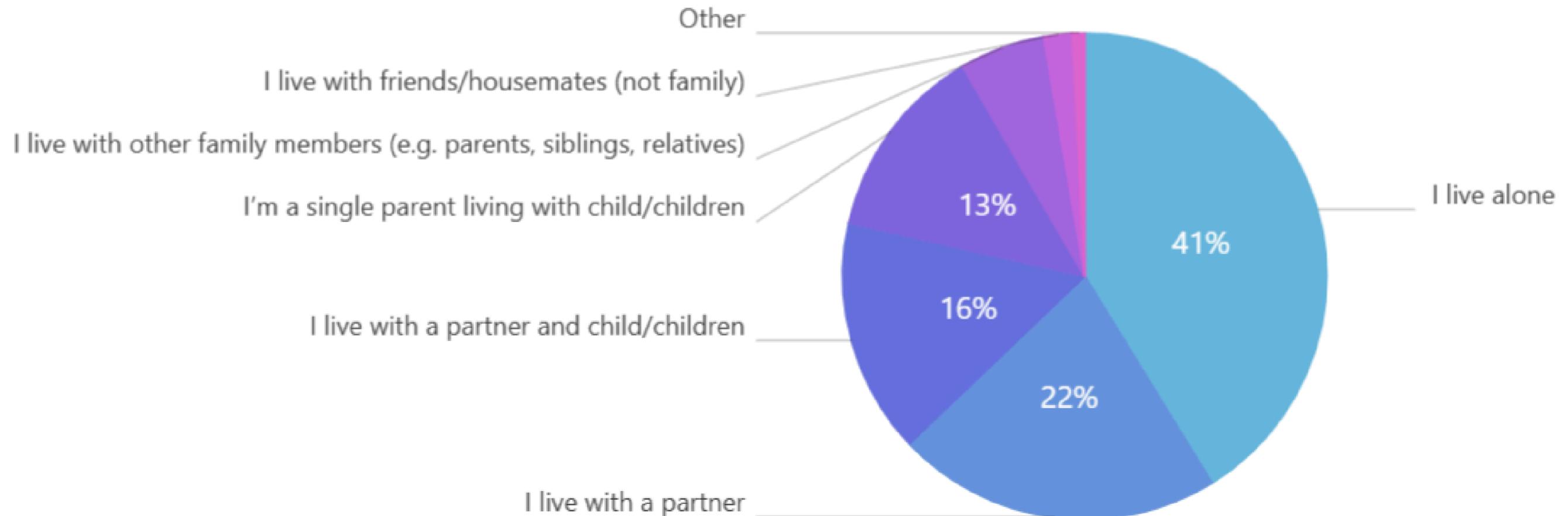


# Further Insights

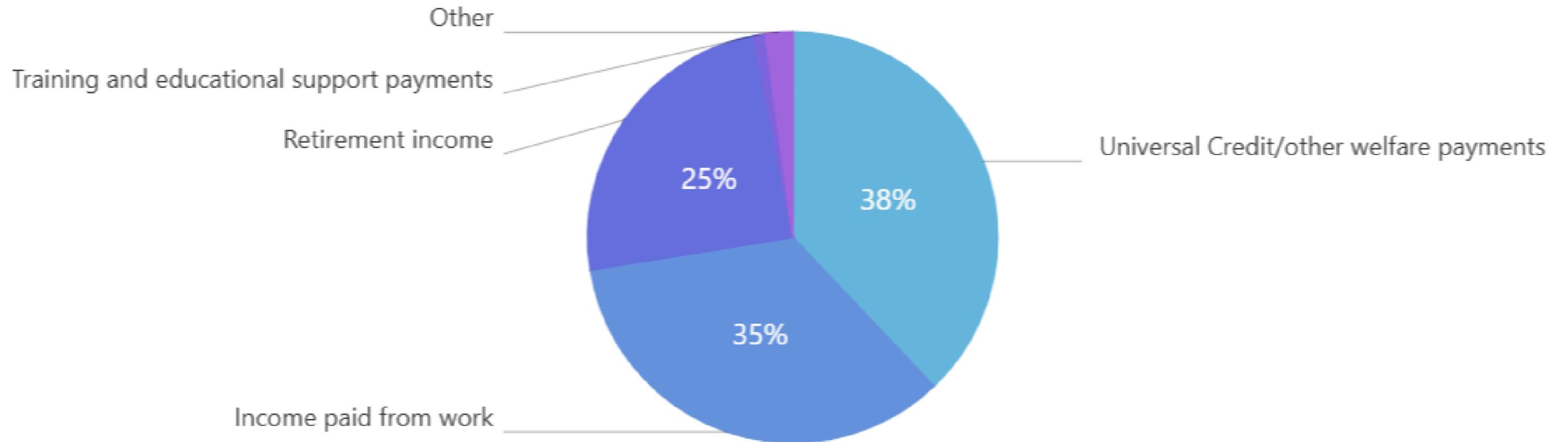


- Disabled and/or sensory loss=largest underrepresented group overall
- LGBTQ+ and neurodivergent households both appeared more frequently in the private sector
- Older people and carers were more common in social housing
- Black, Asian and Ethnic Minority representation remains low.

# Renting situation



# Sources of income:



# Limitations

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- Online survey may miss people without digital access
- Results mainly reflect social housing tenants due to sample size
- Some ethnic groups are under-represented
- Gypsy, Roma & Irish Traveller communities not fully captured
- Some housing types are hard to compare
- Not all questions match last year
- But, key trends can still be compared year-to-year

# FINDING MATTERS

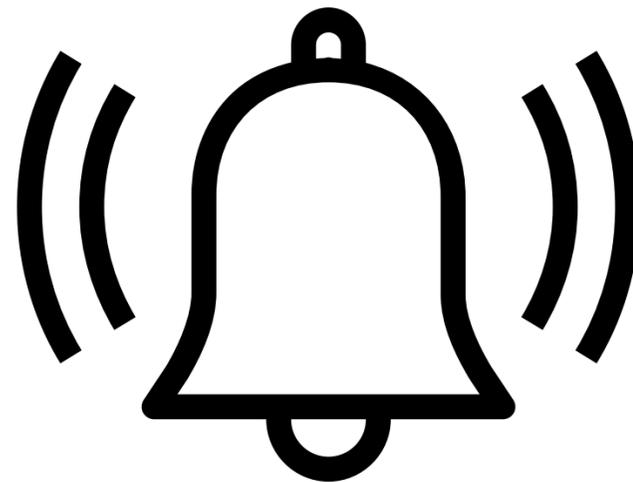


# Housing Security & Affordability Matters



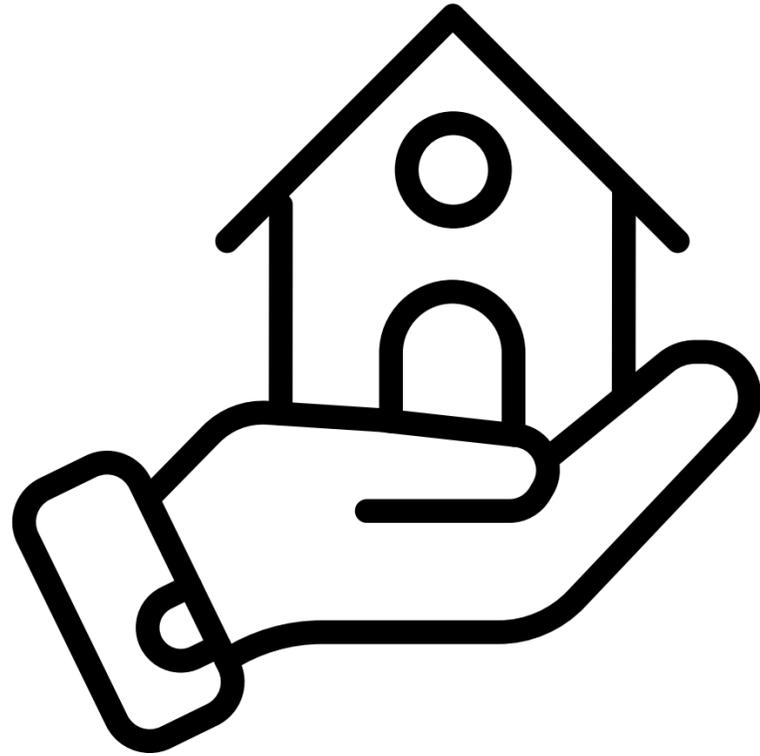
Long term renting remains most popular (61%)

Only 39% of private renters versus 67% social



Housing insecurity remains (17%) why?

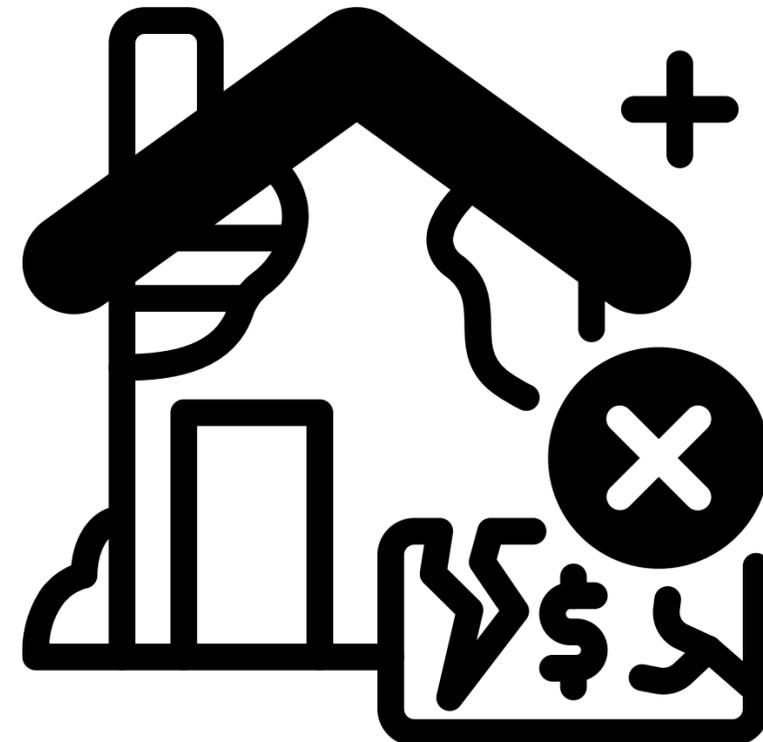
- Damp and disrepair
- Affordability issues
- home unsuitable for needs
- ASB
- Tenure insecurity



## Aspirations of home ownership versus reality of affordability (8% staying till they can afford to buy)

- High rent in their current property
- house prices too expensive in their area
- high living costs

## Lack of control and poverty



# What Matters Most in the home



1. Keeping my home safe, warm, dry and comfortable

2. Feeling safe and secure in my home

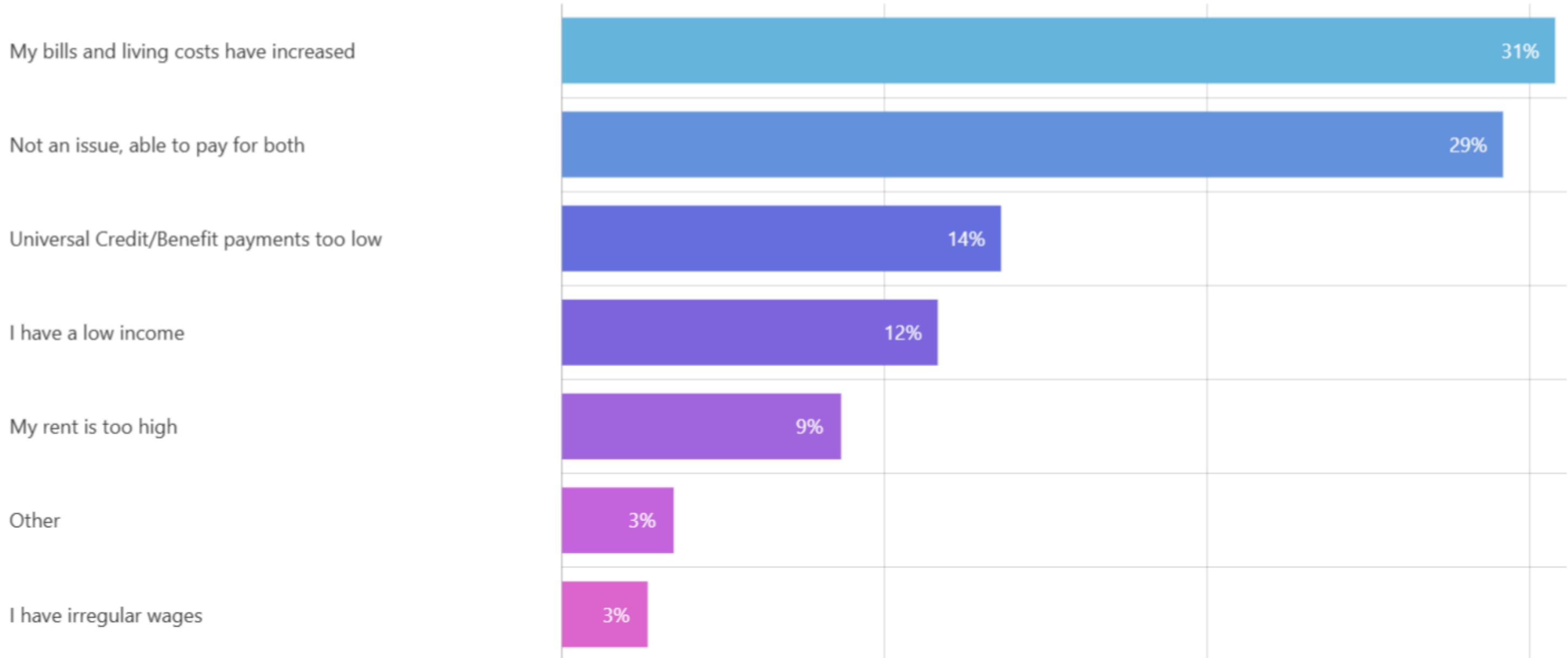
3. Getting repairs and maintenance done quickly when something breaks

4. How much my home costs to rent

5. Living in a home that uses less energy and costs less energy to heat

6. Having enough space for everyone in my household

# Affordability Matters



# Affordability Matters



Food prices

Service charges

Utility bills

Council tax

Transport prices

Bedroom tax

Rent

# Home improvements matter

Property layout/ size (15%)

Better repairs and maintenance (15%)

Parking/ASB issues (14%)

Better energy efficiency (10%)

Better disability/adaptation issues (8%)

# LANDLORD MATTERS

# Landlord Interaction Matters

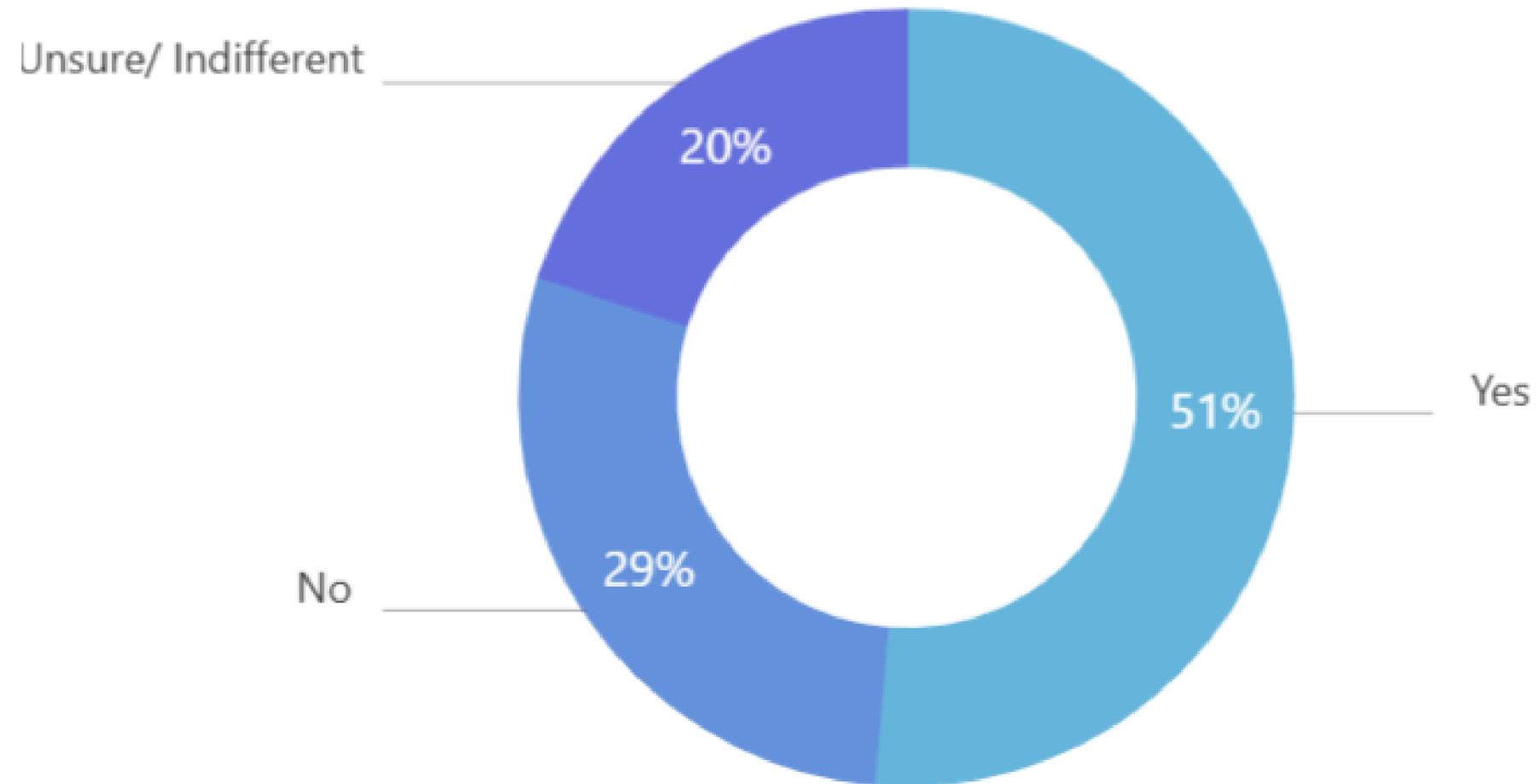
Repairs and maintenance  
dominate interactions (86%)

Survey and opinion requests  
increasing (5% since 2024)

Limited F2F engagement

Asking for support / advice  
levels are increasing (11%  
since 2024)

# Satisfaction with Landlord Communication Matters:



# Landlord Priorities Matter- what should they be?



**1. Keeping rents  
affordable**

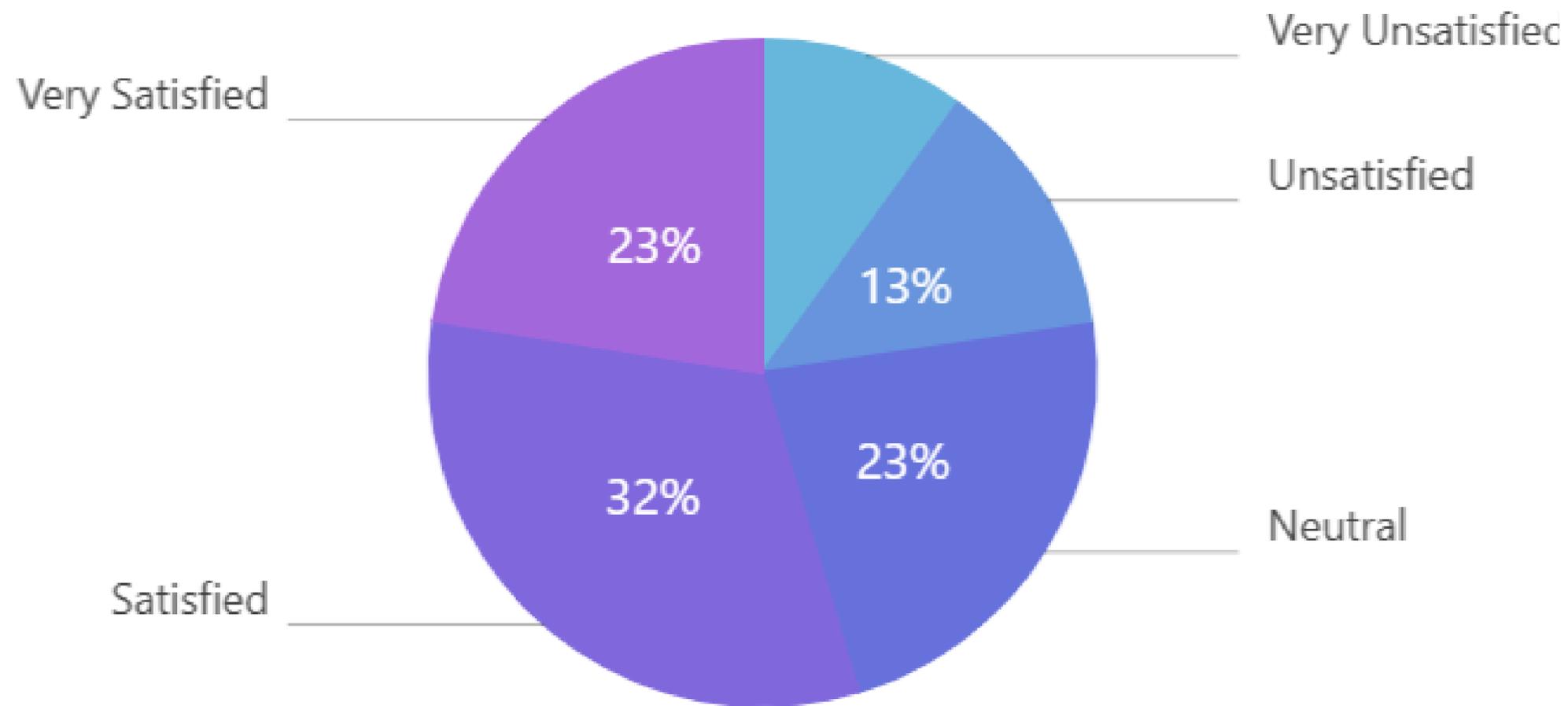


**2. Clear plans on  
repairs and  
maintenance**



**3. Listening to  
tenants**

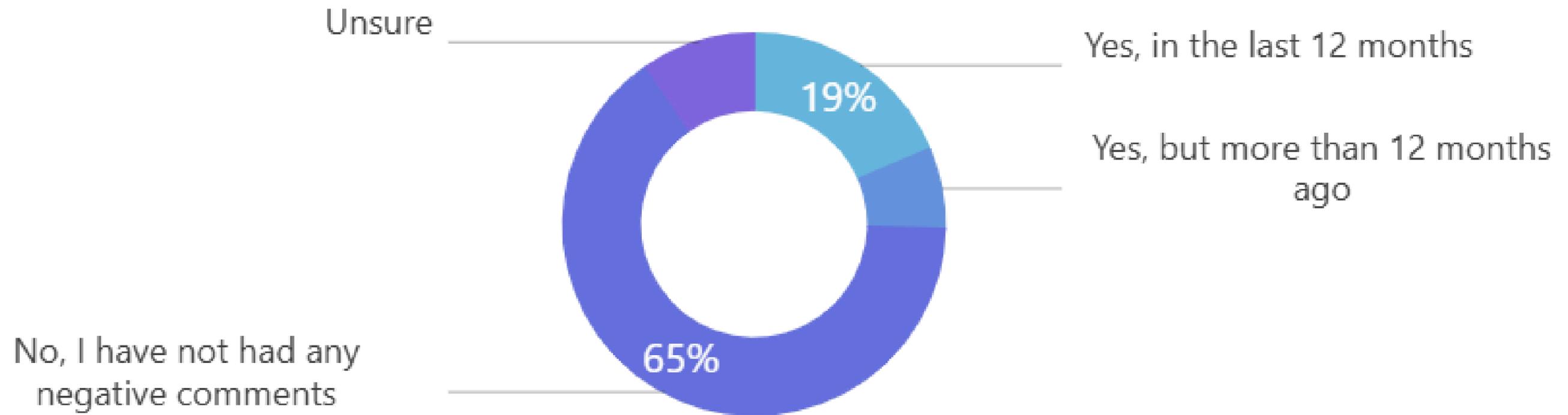
# Tenant Satisfaction with Landlords Matter:



- But- some variations within this: Social renters more likely to be 'satisfied'. Private renters more likely to be neutral
- Underrepresented groups had higher levels of poorer levels of dissatisfaction

**RENTING  
STIGMA  
MATTERS**

# Frequency of Renting stigma



# Frequency of renting stigma for certain groups

1  
—  
4





# Impact and Accounts of Renting Stigma Matter

Classism + 'Second Class Citizens' narrative

Moral judgements about hard work, success+ failure

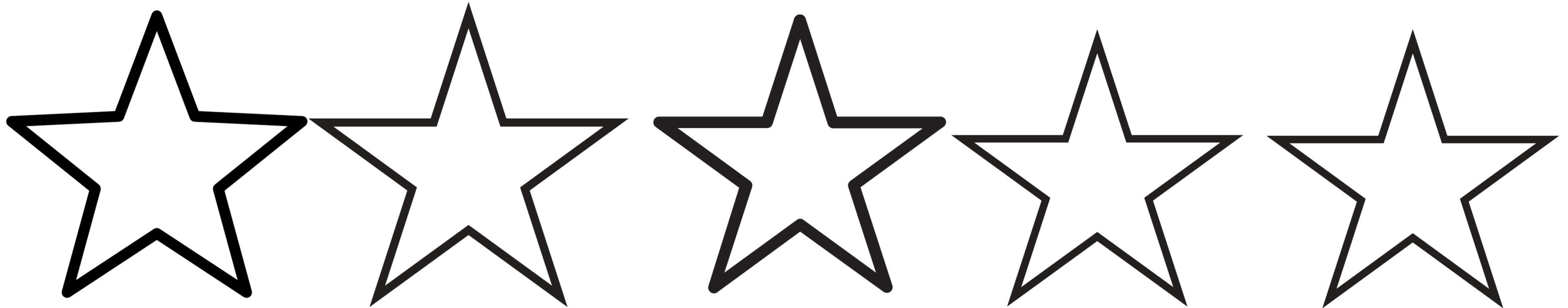
Renting as a financial mistake

Stigma specific to social housing

Personal attacks

**TENANT  
SATISFACTION  
MATTERS**

# Tenant Satisfaction Matters



In this section, we look at results after we asked tenants to rate the following statements out of 5 stars, to gauge attitudes: "I like my home", "I'm proud to rent", "Like the community I live in", "Like my neighbours".

# Tenant Satisfaction Matters



- 1. Satisfaction with the home is generally high but varies by group.**
- 2. Pride in renting is the lowest-rated statement overall**
- 3. Sense of community is strongest among older people**
- 4. “I live in a good area” shows a similar pattern**
- 5. Perception of neighbours is moderately positive overall**

**COMMUNITY  
AND NATIONAL  
TENANT VOICE  
MATTERS**

# The tenant voice on community improvement matters

## One thing they'd change



Reduced ASB is leading concern (17%)



Parking issues (13%) and street cleanliness (12%) follow closely behind

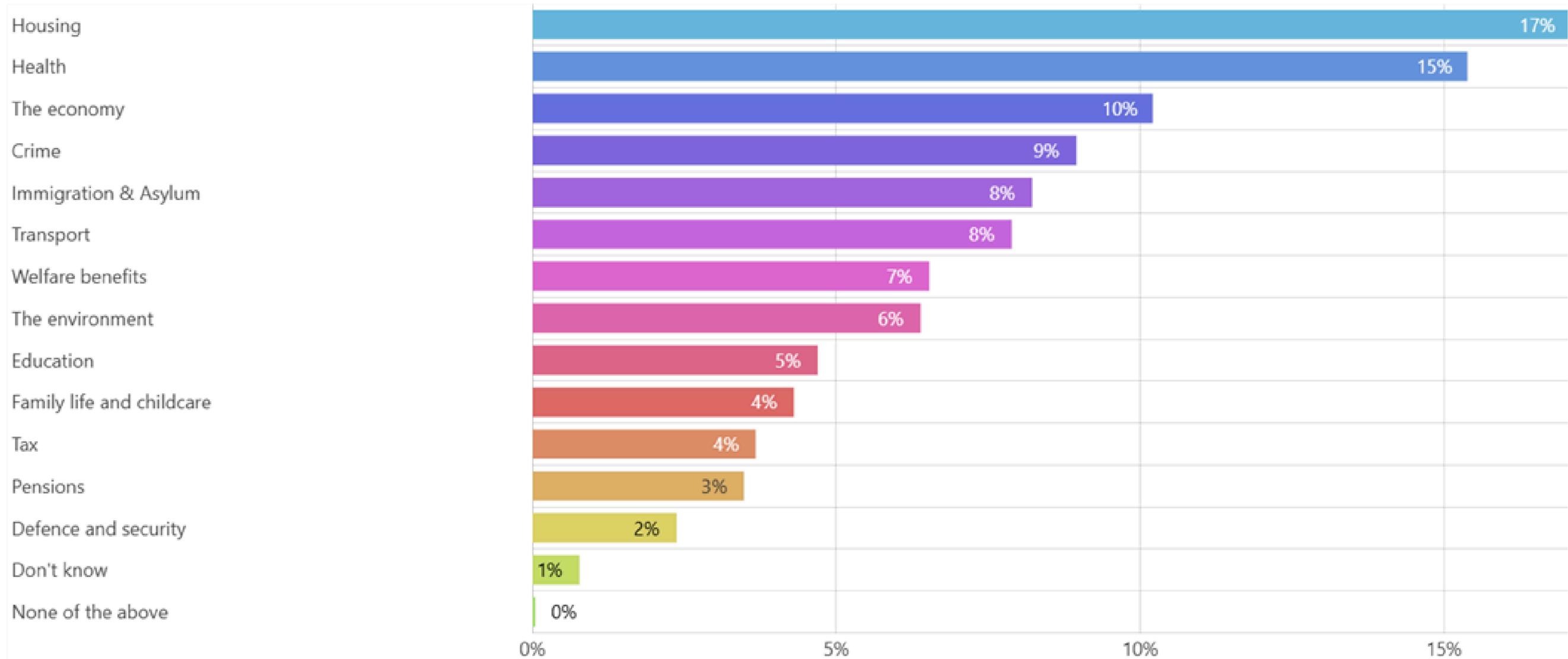


Public Transport (9%) and access to local services (9%) remain important structural needs



Notable minority (8% would change nothing)

# The tenant voice on national matters- Top 3 Welsh Matters



# Overall key findings and recommendations

# Key findings:



Housing Security & Affordability

Tenant Wellbeing

Tenant–Landlord Interactions

Renting Stigma

Renter Ratings

National Tenant Voice

# Recommendations:



# Next Steps

- **The full Pulse Report (with all questions and responses) is now on our website in English and Welsh. Alongside this is a shorter Exec Summary.**
- We are happy to organise a discussion if you have any queries or ideas on how to use these findings in your organisation.
- We are here to support you.





# Thank You Diolch! Any questions?

Contact us: [enquiries@tpas.cymru](mailto:enquiries@tpas.cymru)