



NATIONAL TENANT PULSE ON ATTITUDES TO THE ENERGY CRISIS AND NET ZERO CHALLENGE

AUGUST 2022
WWW.TPAS.CYMRU


TENANT VOICE SPONSOR

Foreword

Croeso and welcome to TPAS Cymru's second **Tenant Survey on Tenant Perceptions of Energy costs, climate change and Net Zero.**

This survey and report were designed to examine tenant views of fuel costs and the wider climate crisis. We believe, as the tenant engagement organisation for Wales, that survey reports like this give decision makers real insight into what tenants are thinking.

We received an excellent response rate, with 714 tenants from across Wales in a wide range of tenure, including tenants of Housing Associations, Local Authority Housing, Supported Housing, and tenants in the private rental sector. This was more than double compared to our previous 2021 survey.

This report should help focus tenant groups, housing staff & policy makers on dealing with energy costs and delivery on the challenging targets of WHQS2 in particularly the Net Zero objectives.

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

Finally, I would like to thank all the tenants who took the time to respond to this survey and we welcome feedback on how we can improve this survey going forward.

David Wilton,
Chief Executive, TPAS Cymru



Introduction to Tenant Pulse

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

They currently take the following form:

- 1) **Annual surveys** - subjects we believe are important and need tracking. Currently there are 2 annual surveys
 - Energy and Net Zero survey
 - Annual 'What Matters' survey looking at what really matters to tenants and their communities
- 2) **Specific topical surveys** we develop with stakeholders 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 on support options, Housing Association tenants on regulation reform etc.

We hope the findings and recommendations within this research offer valuable insight into the challenges tenants are experiencing and their thoughts on the Net Zero agenda. We believe by listening to tenants, and stakeholders being open, honest, and transparent, tenants can help deliver climate change objectives.

All reports are published on Tenant Pulse portal on our website. www.tpas.cymru/pulse

Research Methods

1. The survey was live from the 10th of May - 24th May 2022.
2. We delivered Tenant Pulse via the Doopoll online survey platform
3. TPAS Cymru posed 18 questions (see appendix) to Pulse database members.

How the survey was promoted

- 1) It was sent to 1400+ tenants signed up to Tenant Pulse. Like all long-term survey databases, some members have been on the mailing list for 5 years, so we are seeing a degradation in response rates. It's a challenge to remove non-responders as responses are anonymous so we can't easily identify and remove. We are continuously adding new members, so we believe the 'active' equilibrium is being held.
- 2) Promotion by social landlords and tenant groups to their tenants. This method creates some noticeable differences in tenant responses per landlord depending on the landlord's degree of engagement/promotion. For example, this time tenants of Powys Council responded higher than we normally see on other Pulse surveys which could be due to different promotion by housing staff.

+ Instagram campaign

3. TPAS Cymru created a paid social media advertising campaign using the Instagram platform. Due to the success of the Instagram paid adverts for the 2021 'What Matters' survey, the same approach was taken this year. In the previous campaign, we saw a significant uplift in PRS responders and younger responders.

4. This time our advertisement on Instagram reached 22,095 people across Wales during the duration of the advert – with 33,679 views of the advert.



5. 290 are tracked as started the survey as a result of clicking from the adverts (We believe additionally people just googled Pulse directly as result of seeing the ads). The campaign cost £160 over 6days. There was no evidence of any response drop off on day 6, and more budget would have continued to deliver positive responses – younger responders and private renters.

Data integrity

We reviewed the response data for any anomalies. No issues were found.

Response summary

A total of 714 tenants responded. That includes every housing association and stock retaining Local Authority in Wales as well as a significant PRS response.

This response rate was a 136% increase on our previous Net Zero survey (302 responses in Q1 21). This was the second highest response rate we have achieved for Pulse.

Black Asian Minority Ethnic (BAME) background

3% of tenants in this survey identified as having a Black Asian Minority Ethnic (BAME) background. According to StatsWales, the Welsh population is made up of 5.6% people who identify with BAME associated ethnicities. Therefore, TPAS Cymru like other organisations recognises that it has further work to do going forward to ensure BAME voices are reached and heard.

Survey Note – this survey was undertaken in May 2022 and the analysis and report completed in August. The Energy Crisis has moved at pace and is getting worse for many. Attitudes will be changing fast with more facing potential fuel poverty.

Survey Success

- ✓ This survey was the 2nd largest response rate to date for Tenant Pulse and was double the response rate of last year's Net Zero survey.
- ✓ We had a wide demographic range of tenants which included younger PRS tenants.
- ✓ Instagram advert platform continues to perform in reaching wider audiences
- ✓ A significant percentage tenants (who gave their name) are not known to us or engaged in established tenant participation channels. These voices are important to be heard to give a wider more diverse perspective.
- ✓ The questions in this survey were heavily focused around Net Zero and energy efficiency, this survey predates the release of the Welsh Housing Quality Standard 2023, which was also heavily focused on Net Zero.

Key Findings

1. 65% of tenants worry that they will not be able to afford to heat their home due to the rising cost of energy.
2. 89% have changed behaviour on how they heat their home, such as using central heating less.
3. Only 19% said that they have been impacted by closure of Energy suppliers.
4. 64% of tenants felt happy taking part in a group negotiated energy deal based on their local community or landlord.
5. 45% of tenants said they would not pay increased rent in return for lower energy bills compared to 21% who would. There was a sizeable 34% who did not know if they would be willing to pay increased rent and commented that it would depend on how much of an increase or how much they save in energy costs.
6. On a scale of 1-100, tenant respondents averaged 86% when asked how concerned they were about climate change.
7. Majority of tenants would have no idea where or how they would charge an electric vehicle if they switched over tomorrow.
8. When given options of new energy & heating solutions, solar panels were best known (35%).
9. 49% of tenants would be happy to have an Intelligent Energy System installed once they learned more about it.
10. Knowledge of the term Library of Things is low at 25% (partly as often referred to as Benthg in Wales). Interest in a Library of Things doubled once explained.
11. Repair cafés are more well-known at 53%, the most interested group once explained were under 30 renters or tenants who identified as BAME (both 85%)

Recommendations:

- Tenants need more engagement and communication from their landlords on how Net Zero will impact them and what to expect in the coming years. There are many different solutions to achieving higher EPC rated homes, and with so much information being released on what needs to be done, it can become confusing for tenants to know how their homes will change.
- With the recent release of WHQS2, there needs to be clearer discussion, information and guidelines on how Net Zero goals will be funded and how they will be implemented.
- Welsh Government policy and Landlord investment programmes must invest in existing homes to bring energy efficient ratings up to the new standards to tackle the energy crisis which would benefit the tenant financially when paying rent and provide a warmer home.
- Landlords should review their tenant participation strategies to ensure that these projects and services are being monitored by tenants to identify and track tenant satisfaction.

Part 1: Establishing who responded

What type of tenure do you live in?

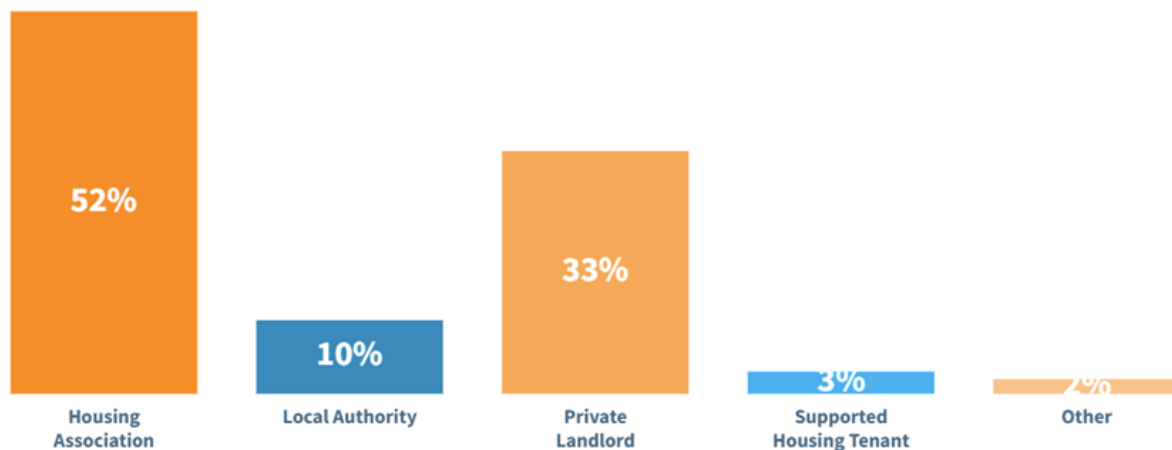
We ask this to track data sample integrity and use as a filter in studying different response rates of subsequent questions.

As stated, 714 people responded.

Note: We are pleased with the mix of responses. When we started Tenant Pulse, we had high levels of Housing Association tenant responses (as much as 85% in past), now at 52% as other tenues respond in larger numbers.

Whilst we are growing responses across all tenure, we are delighted to see that 33% are now PRS tenants. We would like to see improvement in this response rate from local authority tenants.

So we can understand your answers better, what type of tenant are you?



'Other' is a mix of share ownership or people unclear of the ownership of their accommodation provided by support organisations or charities

For reference – the tenure breakdown compared to last year's equivalent survey is:

Housing Tenure	2021 breakdown	2022 breakdown
Housing Association	68%	52%
Local Authority	13%	10%
Private Landlord	10%	33%
Supported Housing	2%	3%
Other	7%	3%

Representation across Wales

What County/Local Authority do you live in?

Highest responding areas – all tenure	Highest responding areas for housing association tenants
1. Cardiff	1. Newport
2. Swansea	2. Swansea
3. Powys	3. Rhondda Cynon Taf

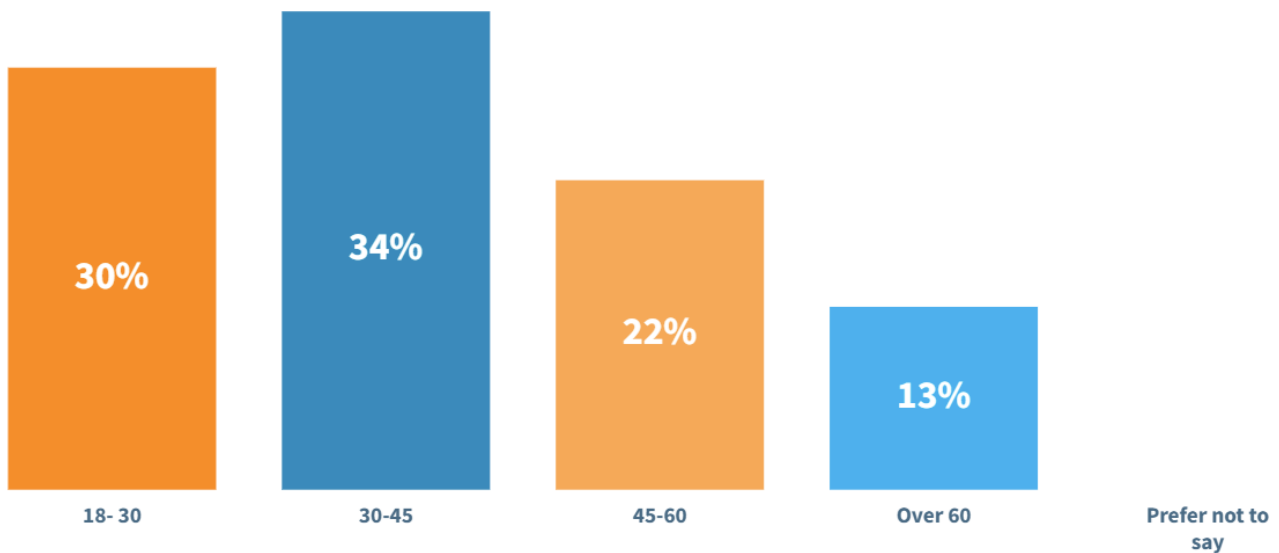
Highest responding areas for private renters	Highest responding areas for local authority housing
1. Cardiff	1. Powys
2. Swansea	2. Swansea
3. Rhondda Cynon Taf /Pembrokeshire	3. Vale of Glamorgan

- It is expected that there will be higher levels of responses from key higher density urban areas of Wales such as Cardiff, Swansea and Newport.
- RCT traditionally returns high levels of housing association responses as there are likely 10+ RSLs in that area.
- Out of the more rural areas, there was good cross-tenure responses from Powys, Conwy and Gwynedd.
- The lowest PRS response area was Merthyr and Gwent valleys.
- Looking at the social and private sectors combined, the lowest responding areas were Flintshire, Wrexham, Torfaen and Ynys Môn.

Age profile

We are delighted to see an increasingly younger demographic responding to Tenant Pulse. This contrasts significantly to traditional forms of tenant participation which often attract an older, often retired audience. This approach provides valuable insight from non-engaged tenants and complements other tenant voice channels that attract a different demographic

Age of responding tenants

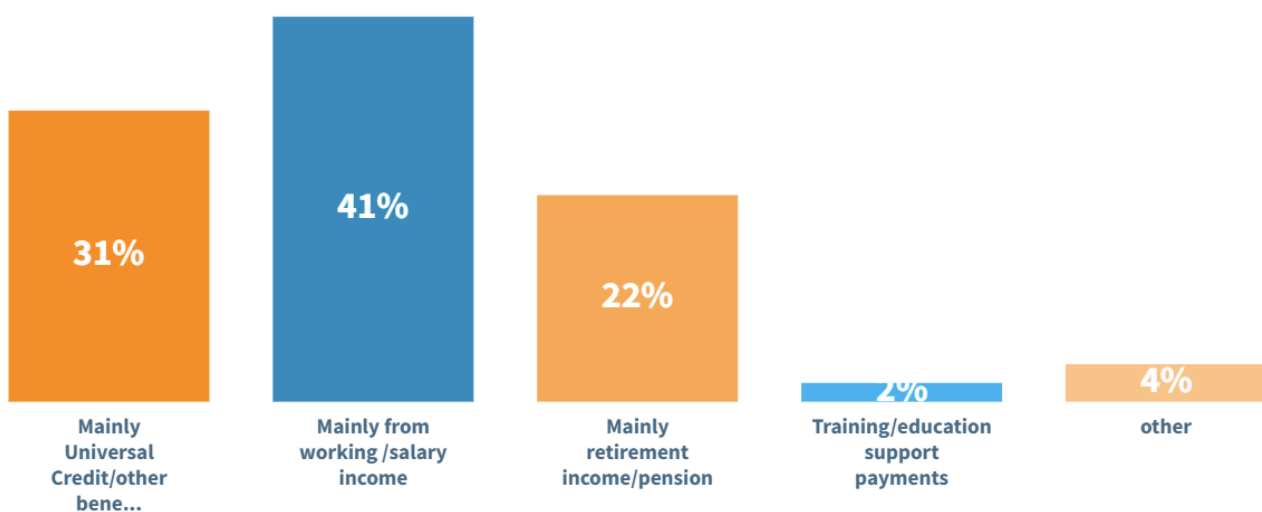


Note: When we filter by tenure, Housing Association responders have a much stronger bias to older tenants and PRS responders have a younger distribution bias.

Tenants Household Income

Note: Tenants were able to choose one answer to this question with no open comment box.

All tenures: How would you describe your household income situation?



Social Housing Tenants

The main source of income for social housing tenants was Universal Credit (38%) and retirement income (30%).

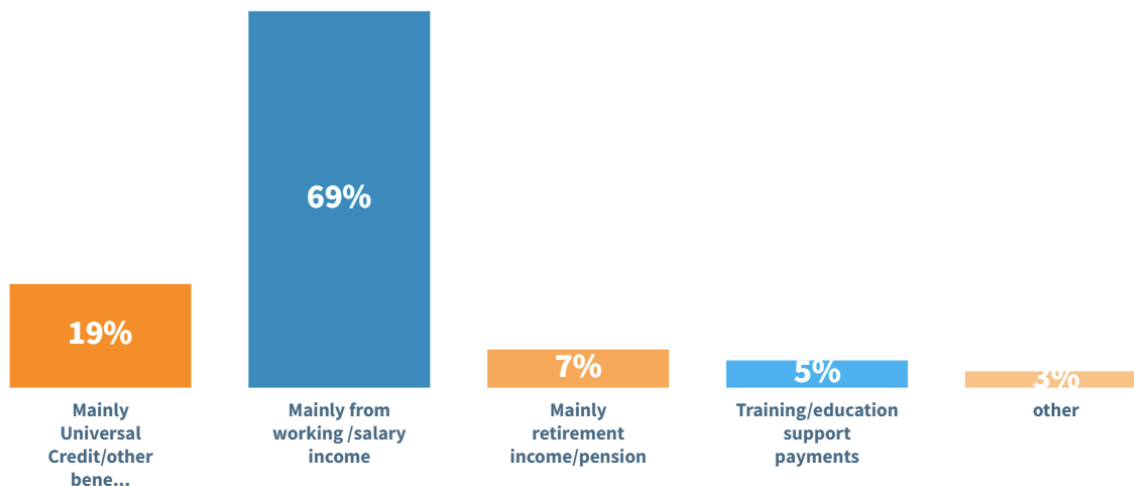
This is not unexpected due to higher age range of social housing tenants completing this survey and people with support needs.

Over a quarter of tenants (26%) rely on earned income as their main source. That is not to say that only 26% of tenants are working, simply that only 26% earn enough as their main income.

Private Housing Tenants

The main source of income for private tenants was earned income (69%). This is partly due to the age demographic amongst those who responded to this survey (younger), only 7% of tenants relied on retirement income and 19% on Universal credit.

How would you describe your household income situation?



Comparing how income is generated in households in social housing 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.

When filtering and considering age differentiation, we can see that those aged between 18-45 rely the same amount on a working income, at 65%. This differs from last year's Tenant Pulse, where those aged 18-30 relied the most on a working income, and only 46% of those who were 30-45 relied on a working salary. Tenants aged 45-60 rely 45% on Universal Credit, and 46% on a working salary, an interesting split. Those aged 60+ earned most of their income from retirement (67%).

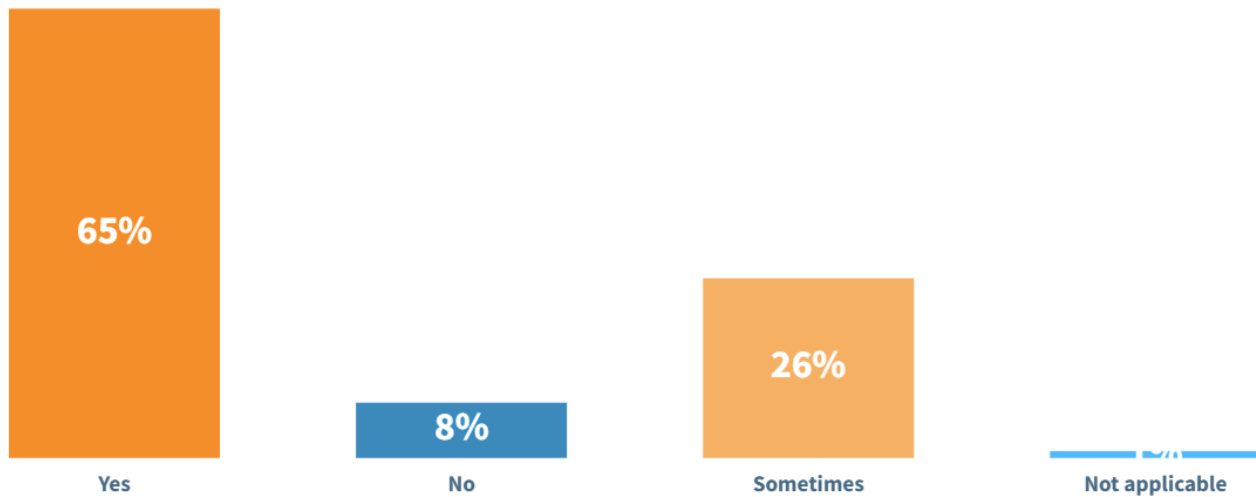
In terms of respondents who identified as BAME ethnicity, there were no significant differences in terms of household income situation compared the overall response.

Only two percent of overall respondents claimed to have received income from training and education support, in other words, this demographic is students. The student market and the tenant experience are a very different situation. We recognise this and want to do more research and insight but believe these Tenant Pulse surveys should remain focused on longer term renters.

Tenants Views on Cost of Energy

The purpose of these questions was to understand how the cost-of-living crisis will impact tenants. Responses will likely change as time goes on, as this survey was released and answered prior to the energy cost increases. The next rise in energy caps in October 2022 brings a lot of questions as to how much energy bills will increase, and with many homes not energy efficient, this will raise tenant's bills significantly.

Do you worry that you will not be able to afford to heat your home due to the rising cost of energy?



The most common response showed that tenants feel they will not be able to afford to heat their home if there is a rise in the cost of energy.

Rising costs of heat have also caused tenants to change their behaviours and lifestyles, with 89% of respondents agreeing that they have had to make changes.

Housing Association tenants were most concerned at 74% and PRS tenants lower than average at 55%. Supported Housing tenants were least concerned at 40%.

Changing behaviors regarding energy usage

Have you changed your behaviour around how you heat your home because of the rising cost? For example, using the central heating less.



When we filtered for those who hadn't changed behaviour and reviewed supporting comments, many fell into:

- 1) Older social housing tenants who live in schemes where energy costs are part of rent/service charges.
- 2) Tenants who couldn't change their behaviours for medical reasons

Comments from tenants:

"Yes, as I have Raynaulds Syndrome I have spent more time in bed with the electric blanket on and worn gloves, scarves and hats to keep warm. The thermal heat from the sun is now prevented from heating my home since external insulation was fitted. This means I'm using heating in May when usually I wouldn't need to."

"Lots of blankets and very warm clothing. Going to bed earlier when possible."

"Only turn the heating on in winter when it's REALLY cold. Use candles in the evening instead of light bulbs. Put washing outside when I can instead of in the dryer."

From those who stated that they have NOT had to change their behaviours because of rising costs, here are some of the reasons why:

"My partner is ill and always very cold so I still have to put on the heating."

"Our radiators are electric and go on and off at pre-defined intervals. They've always been like this so cannot change my behaviour."

There are some positive stories: *"Lucky to have a new ground-source heat pump installed just over a year ago, because the old one failed. It is automatic and responds to outside temperatures. My electricity usage has dropped considerably over the last year."*

Note: many of those who stated 'NO' to this question commented that they will not change behaviours because 'they will not survive if they do'. Existing conditions have left some tenants without a choice of turning the heat on or off, as not turning it on could result in sickness /death.

When filtered, there were no immediate categories that were statistically higher or lower. We ran 30+ filters but categories were similar impacted e.g BAME tenants 89%, all PRS 90%, under 30s 92% over 60s 86%. The category with the highest level of concern (100%) who have changed their habits are: local authority tenants aged 45-60.

Changing in the Energy Market: Energy Suppliers closing

Energy supply companies have closed in recent years, reducing from about seventy companies to now twenty-two, with prospects of further reducing to twelve companies. These closures can bring stress to tenants if they have to find a new provider, set-up an account, and figure out new protocols that are unique to each company.

Note: only 2% had energy included in their renting arrangements.

When we look at the detail, there wasn't a great variance – energy suppliers folding has been impacted across the housing sector.

There was a slight dip in housing association and local authority tenants being least impacted, and private renters of 30-45 were the higher impacted.

Key finding: When asking tenants about their energy company, 19% responded that they have been impacted by the company closures.

Attitudes to landlord being an energy broker/supplier

Question: As energy companies close and tariffs are changing fast, some residents/communities are grouping together and looking for a group deal with a chosen energy supplier (still with individual bills).The aim is to negotiate a better price and quality for all.

Would you feel happy taking part in a group negotiated deal based on your local community or landlord?

The purpose of the question was to test tenants' attitude to localised energy solutions that were based on community or potentially 'billed' by landlords. New energy generation solutions combined with technology like Intelligent Energy Systems (IES) offer new options around community energy generation.

Results:

The slider question was a 0-100 scale of Not interested/Interested.

The average across tenure was 64% however it attracted divided opinion.

Those who scored over 50%, their average was 82% and those who scored less than 50% their average was 18%.

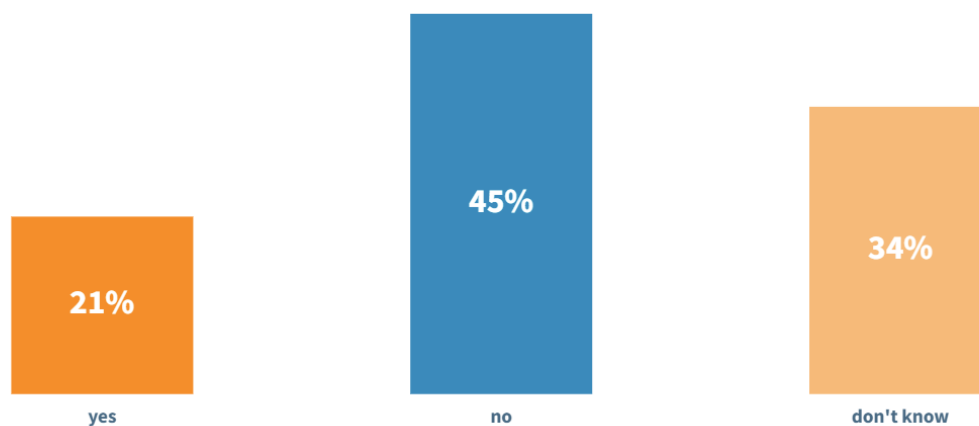
There was no significant difference in HA's v LA or ages. Slightly decreased enthusiasm amongst PRS tenants.

Low Energy Cost Homes

The 2023 version of the Welsh Housing Quality Standard opens questions about how retrofitting homes to Net Zero is going to be paid for. Many tenants have expressed concerns that funding responsibilities will fall on tenants via rent rises, and with already rising living costs, this can bring uncertainty. Cost of living is on the rise with growing inflation and drastically increasing energy costs.

We asked respondents if they would pay an increased rent for lower energy bills, 45% answered 'no,' with 21% answering 'yes,' and 34% answering that they are not sure.

Converting an existing home into a very low-cost energy home is an expensive process. Would you feel comfortable paying increased rent for a low energy cost home?



What the filters revealed:

- Housing Associations were marginally more willing to pay higher rents for a low energy home (25%). Within that, the lowest acceptance was with 18-30 (13%) and highest amongst >60s.
- Local Authority tenants were least willing to pay higher rents for low energy (16%).
- The highest level of 'don't know' was with private renters (40%).
- Regarding age, there were similar results amongst all age groups on whether they would be willing to pay an increased rent for lower energy costs. Over 60's were clearer in 'No' and 18-30 were more likely to answer 'don't know.'
- There was one category that was out of line. When we filtered on source of income students stood out at 47% acceptance for increased rent for low energy cost homes (that's double most others). All other income sources came in at a range from 18%-27% agreeing.

Here are comments from tenants on why they would pay an increased rent price:

"I would rather pay that little bit extra to have an energy efficient home that's cheap to run"

"Surely the money you would save would benefit your income and also save on the environment"

"I currently live in a house with a very old boiler. I'd happily pay more rent for something more economic and environmentally friendly"

"I would agree to a change but every home is different and consultation is the key word for myself."

Comments from tenants on why they would not pay an increased rent price:

"Would not be impossible to afford to pay more, rents already goes up on average £20-25 per month year on year. Already having to choose between heating and eating."

"Our pensions are one of the lowest in the western world. I expect to be in debt by the end of the year."

"I already pay half my income in rent. I can't afford more."

Comments from tenants who responded that they don't know if they'd pay an increased rent:

"Could work out cheaper long term but would need to see evidence."

"I have a low income and struggle to cover all of my existing expenses. I also have adjustments made to my home to suit a wheelchair user, as my daughter has a disability. So moving is a complicated prospect for my family."

"Would have to see clear evidence that the increased rent would save me money in energy in long term."

"Ideally yes, but I am extremely poor and can barely afford my already low rent alongside other living expenses."

Tenants attitude to climate change

Housing makes up for 40% of the UK's overall carbon emissions, causing climate change to become a leading topic in the housing sector. Welsh Government's Welsh Housing Quality Standard 2 is heavily centred around climate change and Net Zero. How much do tenants know about Wales's objective of a pathway to Net Zero?

A few of the questions on this year's survey were a bit more interactive than just a simple tick boxes, and they allowed respondents to use a slider to respond to the question.

Key Finding: On a scale of 0-100 not concern to very concerned, respondents averaged 86% concerned about climate change. Those aged 18-30 were the most concerned about climate change (94%), followed by the 30-45 age group (76%).

When adding different filters on to get a closer look at those who are concerned about climate change, it revealed that 93% of housing association tenants were anywhere from 'concerned' to 'very concerned' about climate change, comparing to the 81% of respondents in the PRS who responded similarly.

Electric Vehicle Charging Points

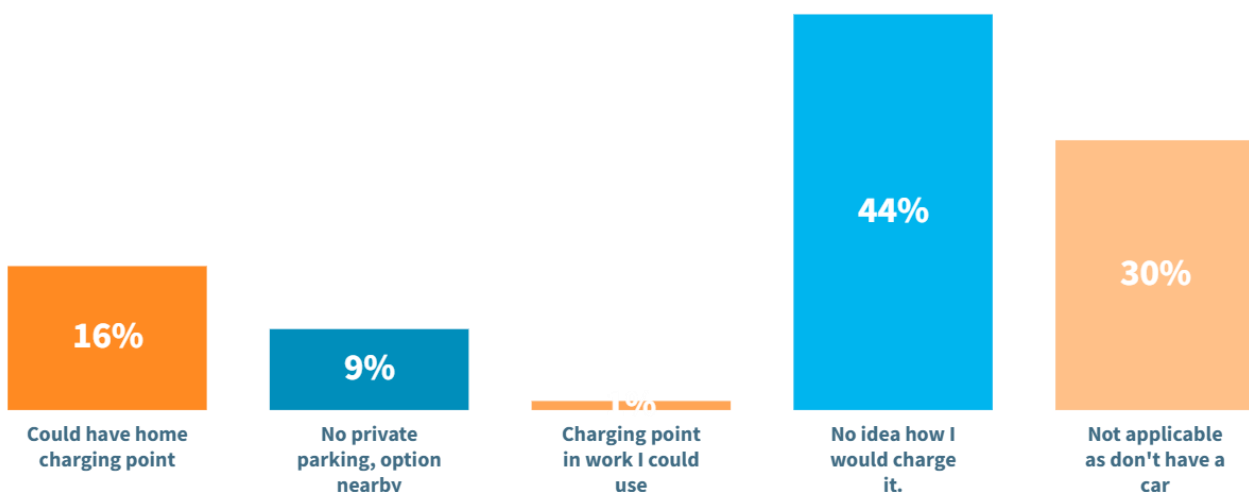
Electric cars are becoming the up-and-coming standard for cars, and it's important to know how people would make the transition from petrol cars to electric. In the United States, where the buildings are newer and the roads are bigger, it may be easier to implement charging points. In Wales, where there are a lot of terrace homes, higher density accommodation and smaller roads, it's not quite as simple to install EV charging points. We asked tenants about their options should they get an electric vehicle.

We found that most respondents had no idea how they would charge it.

Key point: It is notable that respondents who were ages 18-29 years were more likely to not have a car, so the question was less applicable for them.

Overall Responses

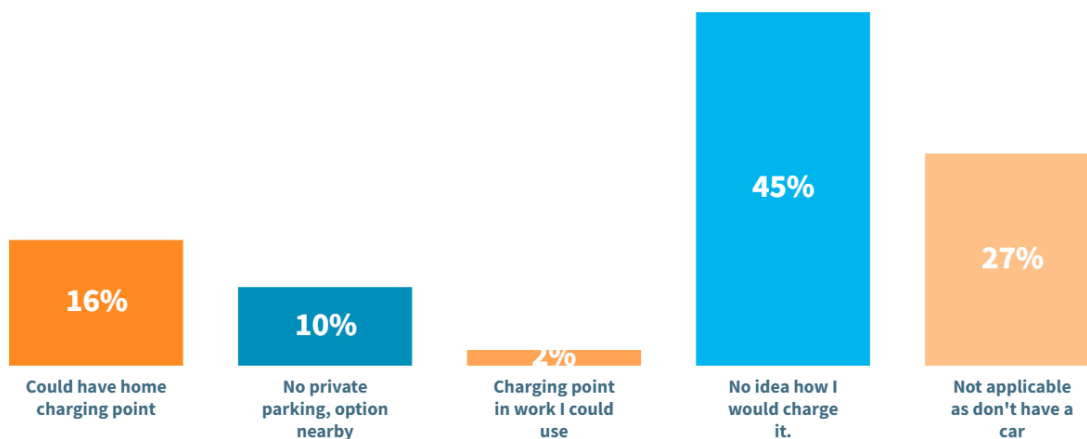
If your car was replaced by an electric car tomorrow - how would you charge it day to day?



Once you filter out 'Not applicable' – there is sizeable number respondents who do not know how to charge their electric vehicle should their petrol one be replaced today. Too few felt they could charge from their home. Is this a barrier for EV take up?

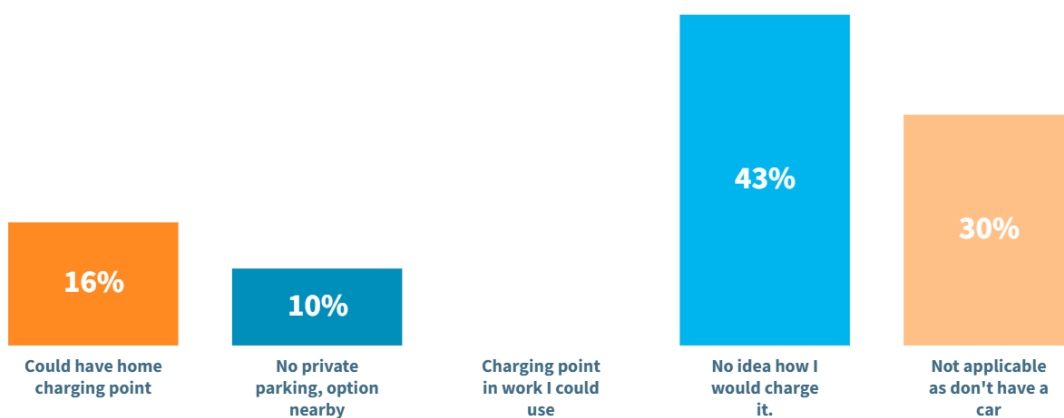
Private Housing Tenants

If your car was replaced by an electric car tomorrow - how would you charge it day to day?



Social Housing Tenants

If your car was replaced by an electric car tomorrow - how would you charge it day to day?



Across the board, the private housing and social housing tenants answered similarly on this question in the survey, and this shows that there will be problems faced should Wales want to move towards more electric vehicles.

When looking at filters to help narrow the findings, region of residence does contribute to answers around electric car charging. 38% of Pembrokeshire residents said that they could have a home charging point, compared to the 8% of respondents in Cardiff who could install a home charging point. Could this reflect higher density living where individual charging is more challenging? Similarly, while the numbers of those who do not have a car ranged from 25%-35% in more rural regions, 58% of Cardiff PRS respondents do not have a car. This shows the different needs of tenants based on where they live, if driving is more common in their city, whether they rely on public transport, etc.

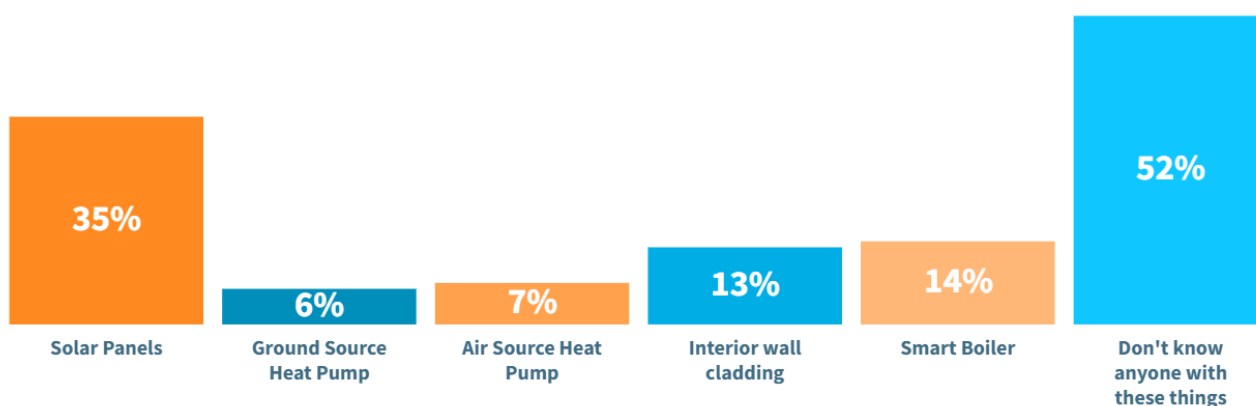
Tenant's Knowledge on Energy Efficient Systems

New heating systems are being installed in homes to make them more energy efficient. Some examples of these new systems are solar panels, ground source /air source heat pumps. Education around what tenants can expect to see potentially installed in their home is essential in the success of Net Zero, and each home is unique in what work they may need done.

Tenant engagement is **key** in the pathway to Zero. Tenant engagement needs to take place well before and continues after work is done in a tenant's home. There are lifestyle changes that come with going Net Zero and landlords need to be transparent about what those changes could look like and provide support thought the transition and beyond.

We asked survey respondents to choose out of a group of five new heating systems, if they know anyone with these any one of these systems or have them installed in their own home. An overwhelming 52% of respondents stated that they don't know anyone with these systems.

Over the next decade, your home might have a new heating system or physical adaptations to make our homes more energy-efficient. Do you or someone you know have any of the following (pick ones that apply)



These numbers aren't to say that more people don't have these systems, but it draws more on the awareness that respondents have of these systems.

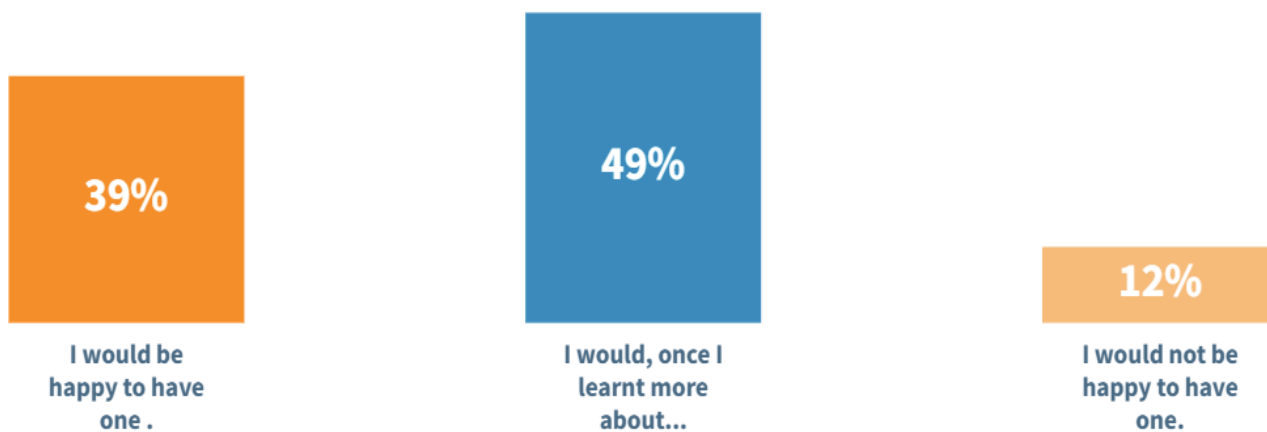
Our aim was to benchmark high level awareness. This figure ultimately shows the work that is needed to be done, with more than half of the respondents not having any of these systems or knowing anyone else with any of them either. The Welsh Housing Quality Standard has a goal to get all social housing properties to EPC A by 2033, and this figure shows that there is a major push on work needed.

In terms of break down noticeable difference were:

- Local Authority tenants had least awareness.
- Tenants 18-30 were most aware of solutions like heat pumps.

Intelligent Energy Systems

Intelligent Energy System (IES) is a form of a smart meter/controller fitted into a home to help optimise the energy efficiency. Eventually, it will be used to learn a person's preferences for when they use their energy, and it then assist the user how to optimise their energy usage/costs. We asked: To get the best out of the kit, smart monitors are also fitted to monitor and optimise the warmth. They learn your preferences and how you live in your home and optimise your energy. These are called IES systems (Intelligent Energy Systems). Would you be happy for your energy provider to install one a part of energy efficiency projects?



The Tenant Pulse results revealed that 49% of tenants would be happy to have one installed once they learned more about it, with 39% of tenants ready to have one installed, leaving 12% of tenants saying that they would not be happy to have an IES installed in their home.

A filter was used to see how people who were concerned about heating their homes with the rising energy cost responded to this IES question. There was a jump to 47% of these respondents answering that they would be happy to have an IES put into their home, showing an awareness around the fact that an IES is supposed to track where your energy is going, and therefore help you lower your costs.

The highest percentage of resistance to an IES system being installed came from those who said that they would not be comfortable paying an increased rent price for lower energy bills. 20% of those respondents answered that they would not be happy to have an IES installed in their home, leading us back to that question of tenant trust with their landlords and awareness around these new Net Zero and energy solutions.

When looking at age, those who were 60+ had the lowest percentage of those who would be happy to have an IES installed, with 51% answering they would allow it once they learnt more, and 16% answering that they would not be happy to have one.

Net Zero brings new kind of technology, and this will be a learning curve for tenants all over the world, especially for those who are not ready for any lifestyle changes that these new solutions bring. But, these percentages show that engagement and education on Net Zero can help dissolve some of the myths around Net Zero.

Note: Following the survey, TPAS Cymru ran a Net Zero themed week. A representative from Sero ran a session on Intelligent Energy Systems and what it means for tenants. The tenant feedback from that session was very positive as Sero set out what an IES was and answered questions. As always, open engagement helps break down barriers and concerns.

Circular Economy

Circular economy projects are attracting interest in Wales and especially those working in the poverty/community resilience agenda. Instead of traditional economies where you buy something, use it for a bit and then throw it away, circular economies work to eliminate overall waste and consumption, by extending the life and use of items. There needs to be a change in mindset when discussing Wales's success in the pathway to zero, and circular economy is a fundamental piece in that mental switch when it comes to consumption.

In this survey we explored two subjects – Library of things & Repair Cafes.

The Library of Things is a social enterprise with locations developing in Wales that helps people save money and reduce waste by affordably renting out useful household items. Items can range from DIY power tools, garden equipment, and sewing machines to children's games, beach chairs and camping equipment. Library of Things locations in Wales are opening across Wales, often under the guidance of Benthg Cymru.

A repair café is a community space where people can take their broken items and get them fixed by volunteers with relevant skills. Some are themed days, others are open. Repair Café Wales assists many locations in their set up and development.

With an unprompted explanation, 25% of respondents had heard of a Library of Things. We considered this was high as i) there are not many live locations around Wales ii) it's not easy to guess what it is.

Looking at ages, those ranging from 18-30 years old held the highest percentage when asked if they'd heard or visited a Library of Things, with 31% responding that they have. The lowest number of those who had heard or visited belonged to those aged 60+ at 22%.

48% of tenants said that they would visit a Library of Things after receiving an explanation as to what it is.

When filtering by sources of income, those receiving income mostly from educational support systems (students) responded with the highest percentage (60%) that they would visit a Library of Things, followed with those who mainly earn their income from a salary (55%). Students often are exposed to similar organizations through their university's student union, as many universities also have refill shops and co-ops to help students be more eco-conscious.

We then asked if they had heard or visited a repair café. 53% of respondents answered that they had. Looking at the response distribution, as you would expect there was few 'not sure' – it was a confident yes or no.

After giving a brief summary of what a repair café was, this was the response:

- 65% of respondents answered that they were likely to visit a repair café.
- When filtered – there was no noticeable difference between tenure type or income source.
- The most interested were under 30 renters or identified as BAME (both 85%).

Conclusion

This report explores the views of many types of tenants from across Wales. This Tenant Pulse was designed around energy and Net Zero, and the release of WHQS2 further instated an urgent addressing of how tenants will be impacted by Net Zero goals in the future.

This survey revealed that many tenants are worried about their energy bills for the winter and are hesitant about the new renewable energy systems that may be placed in their home. The cost-of-living crisis is at the forefront of tenant's minds, and with a lot of uncontrollable factors, energy use is one of the only things they can control to keep monthly costs down.

Outside of Pulse, our tenant voice channels are seeing rent increases under high inflation as another issue that tenants are facing. Tenants shared through this survey that while lowering their carbon emissions and their overall energy bills sounds good, unless there is a guarantee that Net Zero systems will reduce their bills, they are hesitant to pay for it.

Changing existing heating systems to Net Zero heating systems can bring lifestyle changes, and this can become overwhelming for tenants, especially with cost-of-living increases. The responsibility must then be on landlords to communicate effectively and efficiently with their tenants to ensure that they are informed of potential changes that might happen to their home on an individual basis.

Solar panels were the most well-known heating system to tenants, and while solar PV can be great for some properties, it is not beneficial for all. There needs to be more work on educating tenants on the systems that they may see put into their own property, such as an air source heat pump or a smart boiler. The landlord and tenant relationship is key in the pathway to Zero, and communication is how Net Zero goals will be met.

There are untapped resources such as Library of Things and repair cafes that can bring a stronger community feel to a neighbourhood while simultaneously helping to reduce carbon emissions and one's carbon footprint. Landlords should expect to see more tenant participation in Net Zero if there is a better feeling of community and belonging.

This year's Tenant Pulse saw an improvement in response from tenants in the Private Rental Sector (33%) and this makes us hopeful that with each year of this survey, we can get a more inclusive response pool of tenants to give us a wider understanding of how tenants are feeling as well as some of the key issues that they are facing. Energy efficiency has become a focus in the housing sector, and it is crucial that everyone contributes their opinion so that organisations and governmental bodies can get a bigger picture of how to propose a suitable action plan. We hope to garner a larger response in coming years from those with a Black Asian Minority Ethnic background.

Next Steps

Tenants have taken time to give their views in this survey. Their voices matter and deserve your consideration and action.

We are holding a dedicated Tenant Network event for tenants to give their views on the findings. We will be sending this report to key decision makers across the housing sector including Welsh Government, Housing CEOs and Heads of Service asking for their conservation and action. All tenants who completed the survey and opted for a copy of the report have been sent a copy ahead of publication.

In addition, based on other TPAS Cymru's reports its 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 know your views on this report and especially what action you took as result of this report

Notes:

- 1) Media enquiries contact: David Wilton drw@tpas.cymru 07896871164
- 2) To view our other Pulse Reports please visit www.tpas.cymru/pulse

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 to shape the future of housing.

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

This is the second of a planned NetZero survey on tenant attitudes. We acknowledge further refinement and improvement is possible going forward annually and 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. The aim is:

- 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 a work looking to amplifying the voice of tenants. We are very grateful to the Pobl Group who sponsor this work.

Appendix A: Questions

1. So, we can understand you better, are you a..	Housing Association tenant Local Authority tenant Private Landlord tenant Supported Housing Tenant Other
2. Which Local Authority Area do you live in?	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
3. What is your age?	18-30 30-45 45-60 60+ Prefer not to say
4. Do you consider yourself as BAME (Black Asian Minority Ethnic) background?	Yes No
5. 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
6. Do you worry that you will not be able to afford to heat your home due to the rising cost of energy?	Yes No Sometimes Not Applicable
7. Have you changed your behaviour around how you heat your home because of the	Yes No

rising cost? For example, using the central heating less.	
8. How concerned are you about climate change (single slider question)	Tenants could slide a marker anywhere from 'not at all' to 'very concerned'
9. If your car was replaced by an electric car tomorrow – how would you charge it day to day?	<p>Could have a home charging point</p> <p>No private parking, option nearby</p> <p>Charging point in work I could use</p> <p>No idea how I would charge it</p> <p>Not applicable as I don't have a car</p>
10. A number of energy companies have recently closed down. Suppliers have reduced from about 70 to 22 and could well be 12 by the end of the year. Has your supplier closed down? Have you had to find another supplier?	<p>Yes – I have been impacted</p> <p>No – Still with the same supplier</p> <p>N/A as my energy supply is a part of rent/service charge</p>
11. Converting an existing home into a very low cost energy home is an expensive process. Would you feel comfortable paying increased rent for a low energy cost home?	<p>Yes</p> <p>No</p> <p>Don't know</p>
12. As energy companies close down, and tariffs are changing fast, some residents/communities are grouping together and looking for a group deal with a chosen energy supplier (still with individual bills). The aim is to negotiate a better price and quality for all. Would you feel happy taking part in a group negotiated deal based on your local community or landlord?	Slider question- tenants could respond anywhere from 'not interested' to 'interested'
13. Over the next decade, your home might have a new heating system or physical adaptations to make our homes more energy-efficient. Do you or someone you know have any of the following (pick ones that apply)	<p>Solar panels</p> <p>Ground source heat pump</p> <p>Air source heat pump</p> <p>Interior wall cladding</p> <p>Smart boiler</p> <p>Don't know anyone with these things</p>

<p>14. Energy saving projects sometimes involve installing solar panels, heat convertors etc into homes. To get the best out of the kit, smart monitors are also fitted to monitor and optimise the warmth. They learn your preferences and how you choose use your home and optimise your energy. These are called IES systems (Intelligent Energy Systems). Would you be happy for your energy provider to install one a part of energy efficiency projects?</p>	<p>I would be happy to have one I would, once I learnt more about it I would not be happy to have one</p>
<p>15. Have you visited or heard about a community service called 'library of things?'</p>	<p>Slider question where tenants could answer from 'No, I've never heard of them' to 'I've heard about them'</p>
<p>16. A library of things is where you can borrow household items for a very low cost, instead of buying them. How likely are you to borrow from a library of things?</p>	<p>Slider question where tenants could answer from 'very unlikely' to 'very likely'</p>
<p>17. Have your visited or heard of repair cafes?</p>	<p>Slider question where tenants could answer from 'No, I've never heard of them' to 'I've heard about them'</p>
<p>18. A repair café is a community event where you can have your household items fixed for free. How likely are you to attend a repair café?</p>	<p>Slider question where tenants could answer from 'very unlikely' to 'very likely'</p>