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EXECUTIVE SUMMARY: THE THIRD ALL WALES ANNUAL TENANT SURVEY

DECEMBER 2023
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Ariennir yn Rhannol gan
Lywodraeth Cymru
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ABOUT THIS RESEARCH:

Since the pandemic, TPAS Cymru have committed to completing an annual survey to people who rent their home in Wales, be it in social housing or private, we want to understand the views of tenants regarding their homes, communities and issues that matter to them the most.

RESEARCH METHODS

- A survey was live throughout November 2023. This was over a 3 week window. This length of time also allowed TPAS Cymru to consult with other third-sector organisations in Wales to promote the survey, ensuring it reached as diverse a tenant population as possible.
- We delivered Tenant Pulse via the QuestionPro online survey platform.
- TPAS Cymru posed 19 questions to Pulse database members and members of the public.
- We used a variety of social media platforms to increase impact

DEMOGRAPHICS

- Our response rate increased by 45% enabling more meaningful tenant insight.
- We had significant increases in younger working renters, under the age of 44, living in the private rental sector.
- We have seen an increase in Black and Minority Ethnic responses.
- Due to high number responses in the private rental sector, we have been able to draw comparisons across the whole of Wale's rental sector.

KEY FINDINGS

- Social housing tenants feel much more secure in their tenure than private sector tenants
- Social housing tenants want to stay in social housing and are proud of it, where as private housing tenants want to save to buy a home
- Repairs and maintenance are still the main issue for renters, across both sectors. There is a decline in tenant satisfaction
- Social housing renters want to know why their landlords are focusing on new builds, instead of their repairs and maintenance
- Private housing renters are struggling significantly with affordability, particularly those under the age of 30.



- Tackling Anti-Social Behaviour (ASB) and the issue surrounding parking is a key priority for social housing tenants, whereas PRS tenants have little expectation from their landlord to tackle such things.
- Black and Minority Ethnic renters receive more negative comments about being renters.
- Improving energy efficiency is key to affordability, damp and overall satisfaction.
- Private renters feel a sense of personal ownership and responsibility compared to social housing renters who expect landlords to act on their behalf

RECOMMENDATIONS

1. Welsh Local Government Association (WLGA) and Community Housing Cymru (CHC) to acknowledge and react to frustrations of tenants around lack of maintenance and repairs whilst new developments go forward.
2. Whilst we continue to focus the efforts in Wales on retrofitting social housing, this report acts as a key informant that the need to expand such efforts into the Private Rental Sector couldn't be more important if we are to keep homes affordable for rent
3. Welsh Government needs to develop an All-Wales Housing Strategy that accounts for the limitations of renters within the private sector who are seemingly being overlooked.
4. Social landlords need to use the findings of this report, compare, and contrast its own organisational activities and consider any changes to internal plans.

TO DISCUSS FURTHER, PLEASE CONTACT:
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