

# FIFTH ANNUAL TENANT PULSE REPORT

*INSIGHTS FROM TENANTS ACROSS WALES*



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# About Tenant Pulse

TPAS Cymru is the recognised expert for tenant engagement in Wales.

We work with tenants, landlords and stakeholders, such as Welsh Government, to ensure meaningful tenant participation is achieved.

Our Annual Tenant Pulse Survey captures the views of private renters, social renters and those in supported housing about what matters most to them.

We use a mixture of qualitative and quantitative data from our online survey and have put forth our findings and recommendations.

The 2025 Tenant Pulse survey highlights the complex realities of renting in Wales today.

Tenants' experiences are shaped not only by the homes they live in but also by affordability pressures, landlord interactions, community conditions, and broader socio-political factors.

While many tenants' report satisfaction with their homes and landlord engagement, significant disparities persist. These are particularly evident for households of underrepresented groups, such as: disabled tenants, neurodiverse households, younger renters, and those from Black, Asian and Minority Ethnic Groups.

# Key Findings

## 01 Housing Security & Affordability Matters

- 38% of households rely on Universal Credit or other welfare payments, rising to 60% of disabled households, 61% of carers, and 59% of neurodiverse households.
- Private renters face higher rent pressures: 16% struggle versus 6% of social renters.
- Rising living costs affect 30% of tenants.
- Homeownership aspirations are low: 8% overall, 4% for tenants with disabilities, reflecting disparities.

## 02 Renting Stigma Matters

- 19% experienced negative comments in the last year; 26% ever.
- Private renters report more stigma (25% vs 17%), with LGBTQ+ households and welfare recipients most affected.
- Stigma includes class, moral, and financial judgments.

## 03 National Tenant Voice Matters

- When asked about the main issues impacting tenants' local areas and Wales at this time, housing is the top national issue for 22% private and 15% social renters, followed closely by health and the economy.
- Crime is more prominent for social renters (10% vs 6% private).
- Immigration is cited as lower priority (8%), slightly higher among social renters (9% vs 5% private).

## 04 Renter Ratings Matter

- Older social renters report highest satisfaction: **homes (4.1/5)**,
- communities (3.95/5),
- neighbours (3.79/5).
- **Pride in renting is lowest overall (3.5/5)**, especially private renters (2.8/5).

# KEY FINDINGS

## A QUICK GLIMPSE TO WHAT TENANTS SAID

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### Tenant-Landlord Interactions Matter

- Survey participation up 5%, support/advice requests up 11% (21% social vs 8% private).
- Face-to-face interactions remain limited.
- 20% feel unsure or indifferent about landlord engagement, rising to 30% for under-30 private renters.
- Repairs dominate interactions; 55% satisfied with engagement, 23% unsatisfied.
- Tenants want landlords to prioritize safe, well-maintained, affordable homes and listen to feedback.

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### Tenant Wellbeing Matters

- 17% feel unsettled due to damp, disrepair, affordability, anti-social behaviour, or accessibility issues.
- Black, Asian and Minority Ethnic and LGBTQ+ tenants are 6% more likely to feel unsettled.
- Repairs and maintenance remain the top landlord contact reason.
- Top home improvement priorities: layout/size (15%), repairs (15%), parking/ASB (14%), energy efficiency (10%).
- Anti-social behaviour is the leading community concern (17%).

# RECOMMENDATIONS

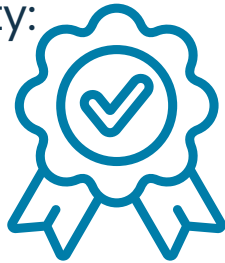
## Affordability

Increase housing affordability and security: more social/affordable homes, stable rent policies and welfare support.



## Housing Quality

Improve housing quality: timely repairs, adaptations and tackling hazards like damp and mould.



## Tenant Engagement

Enhance tenant engagement: inclusive strategies and person centered approaches, including increasing face-to-face consultations and regular feedback channels.

## Renting Stigma

Tackle renting stigma: public awareness campaigns and tenant advocacy services.

## Community Wellbeing

Invest in community wellbeing: reduce anti-social behaviour, improve infrastructure and support landlord-community collaboration.

## Inform policy

Inform policy: ensure tenant voices influence housing, health and community decisions, particularly ahead of elections.

