



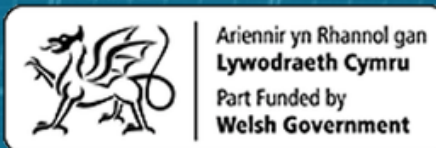
TENANT VOICE ON AFFORDABLE WARMTH & ENERGY EFFICIENCY

EXECUTIVE SUMMARY

2026

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Message From David



David Wilton
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In the face of climate change misinformation, we must stay focused on what truly matters - Affordable warmth.

With 1 in 4 tenant reporting of using no or little heating, inaction isn't an option. We need to upgrade our housing stock, boost energy efficiency, and make a real difference in people's lives.

Overview

Wales is on a path to achieving Net Zero by 2050, with a strong emphasis on creating energy-efficient homes and ensuring affordable warmth for all tenants. For many tenants, the challenge is not about reducing carbon emissions - it's about having a warm, comfortable, and cost-effective home that meets their needs.

"I go to bed about 5pm with an 18-tog duvet because I feel the cold."
- Tenant comment from the survey

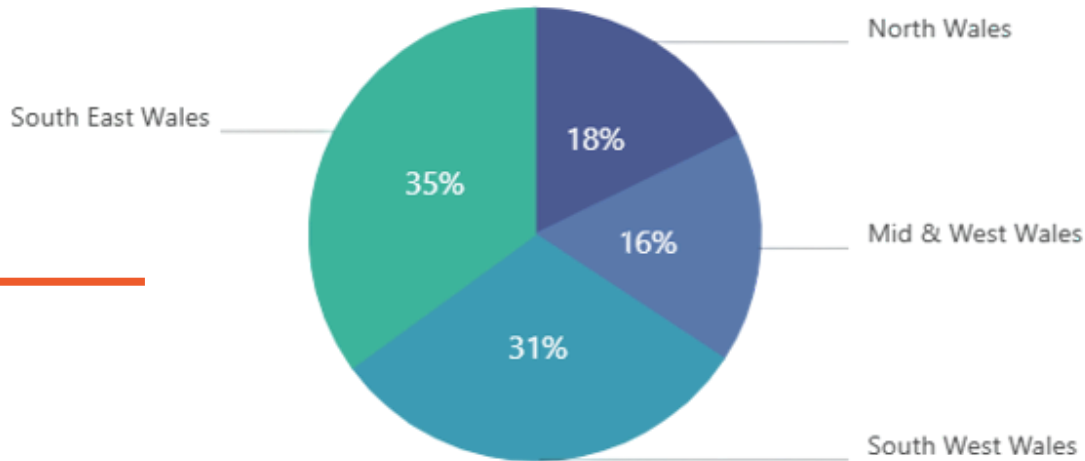
Decarbonisation policies are transforming housing across Wales, with initiatives like the Optimised Retrofit Programme and Welsh Housing Quality Standard (WHQS) aiming to improve energy efficiency.

However, for tenants, the key question is: Are these changes making a real difference in their daily lives?

This report brings tenant voices to the forefront, exploring their experiences and concerns

Where are the respondents from?

Representation from all around Wales



01

Responses by Region

As in previous surveys and in line with overall housing stock distribution in Wales, the highest number of responses came from South East Wales (35%) and South West Wales (30%).

In addition, there was a noticeable increase in responses from Southwest Wales by 4% as compared to the previous year.

02

Responses by Age

Most responses came from older tenants, with those aged 60+ making up 50% of respondents and younger tenants those aged 18–30 (4%).

In the private rented sector (PRS), there was a clear change. The share of respondents aged 60+ increased from around 12% in 2025 to 35% in 2026. This suggests more older private renters took part this year, possibly due to how the survey was promoted.

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Type of Tenancy

This year, we had 23% responses from tenants in Local Authority, Housing Association tenants 60%. Meanwhile, 15% of respondents were from the Private Residential Sector (PRS). (up by 3%).

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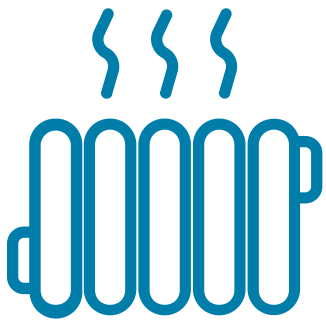
KEY FINDINGS

A QUICK GLIMPSE TO WHAT TENANTS SAID

Tenants are finding different ways to stay warm with clear age differences



A large majority rely on coping strategies such as extra clothing or blankets (86%), with 42% using hot water bottles and 34% electric blankets; Older tenants are more likely to use alternative methods such as blankets, hot water bottles, electric blankets and to reduce heating use. Younger tenants report lower use of these approaches. Lots of evidence of under-heating.



Heating costs remain difficult for most tenants to manage

Only 23% of tenants report that heating is affordable. Most struggle, with 39% saying it is only sometimes affordable and 37% saying it is not affordable at all.

Awareness of EPC ratings remains low and uneven

25% of tenants report knowing their EPC rating, with awareness much higher among younger tenants (48% vs 21–23% for 46+)

Awareness in the PRS was 41% vs 22% in social housing, highlighting clear generational and structural gaps.

Even where awareness exists, there is often confusion about what it means or whether it reflects the true condition of the home.

Many tenants have a smart meter, BUT overall engagement with energy remains low.

68% of tenants reported of having a smart meter. Only 40% have switched tariffs. (of all respondents)

This is particularly evident among younger tenants, who show the highest awareness of EPC ratings, are the least likely to switch tariffs.



KEY FINDINGS

A QUICK GLIMPSE TO WHAT TENANTS SAID

One respondent reported an EPC rating of **G**, which falls below the minimum standard for rented properties unless an exemption applies. **An EPC (Energy Performance Certificate) shows how energy efficient a home is and how much it may cost to heat and run.**

While keeping responses anonymous, this respondent was an older tenant (60+) in social housing (Local Authority) in Southwest Wales, who also reported:

- using extra clothing or blankets
- relying on hot water bottles
- and using very little or no heating

This example highlights how low energy efficiency, combined with reduced heating use, can directly affect how tenants keep warm.

Awareness of home energy assessments

Only 26% of social housing tenants report having had a home energy assessment, while many say they have not (41%) or are unsure (33%).

Awareness was highest in North Wales but remains low elsewhere. Similarly, only 15% of tenants say their landlord has communicated plans for energy improvements, with 70% reporting no communication.

This suggests that, while activity may be taking place, it is not always visible or clearly communicated to tenants.

Choice & Influence

Only 10% of private renters say EPC ratings influenced their decision to rent a property. However, 79% say they would be more likely to stay longer in a more energy-efficient home.

“Choice isn't an option when you are faced with homelessness.”

While tenants value energy efficiency, limited choice at the point of renting means it is not always a deciding factor. This is important as EPC standards in the private rented sector continue to improve.

AREAS FOR ACTION

Improve the quality of housing stock to support both warmth and health

Examples within the survey, including tenants living in very low EPC-rated homes, highlight that poor energy performance can directly affect how people live day to day. Improving housing quality is not only about efficiency, but also about ensuring homes are warm, safe, and support health and wellbeing.

Recognise that coping strategies do not replace adequate heating

Many tenants report relying on blankets, hot water bottles, or limiting heating use. While these approaches help manage costs, they do not address underlying issues of underheating such as cold, damp, or mould, and should not be seen as substitutes for a properly heated home.

Ensure energy efficiency improvements are meaningful within real housing choices

While tenants indicate they value energy-efficient homes, this plays a limited role when choosing a property, particularly in the private rented sector due to a lack of choice. This suggests that without sufficient choice, energy efficiency is unlikely to be a deciding factor, even as standards continue to tighten.

Strengthen how energy information is communicated and understood

Low awareness and mixed understanding of EPC ratings, alongside confusion around smart meters, suggest that clearer and more relevant communication is needed to support tenants in engaging with energy-related decisions.

Improve tenant awareness of programmes such as Welsh Housing Quality Standard

Low recall of home energy assessments indicates that programmes may not always be visible or clearly understood by tenants, even where activity has taken place.