

FIFTH ANNUAL TENANT PULSE REPORT

INSIGHTS FROM TENANTS ACROSS WALES



DECEMBER 2025
WWW.TPAS.CYMRU



Ariennir yn Rhannol gan
Lywodraeth Cymru
Part Funded by
Welsh Government

TENANT VOICE SPONSOR



TABLE OF CONTENTS

FOREWORD	3	DEMOGRAPHIC MATTERS	10
EXECUTIVE SUMMARY	4	FINDING MATTERS	14
ACKNOWLEDGEMENTS	6	CONCLUSION: YOU MATTER	39
CONTEXT MATTERS	7	REFERENCES	41
METHODOLOGY MATTERS	8	APPENDIX	43

Foreword: Welcome to our latest TPAS Cymru All Wales Annual Tenant Pulse.

This Pulse is done annually to capture how tenants and renters feel **right now** about their home, their communities and their lives.

One of the strengths of this report is that we capture the views of social housing, private renters and supported housing.

Wales is facing many challenges locally and globally and its vital we take time to ask tenants and renters how they are feeling about key issues.

Feeding that tenant voice into national level conversations is vital. It must be heard, and policy makers must act on it. This is one of the many ways TPAS Cymru enable tenant voice and there is an excellent guide available on our website of the many ways.

This report is not the end of the task for us. It's the start, from here we will be pushing politicians, media and housing policy makers etc to read this report. We will be presenting findings to tenant groups and boards. If that is of interest of your organisation or tenant group, please get in touch.

You will notice some positive changes and tweaks to the style and layout, as Olivia Browne puts her mark as our fantastic lead on this report. We hope you like the improvements and we value any feedback.

We hope this report will help shape your work and strategies going into 2026. Let's work together to use this insight into making housing better in Wales.



David Wilton
Chief Executive
TPAS Cymru

Executive summary

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.

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 31% of tenants.
- Homeownership aspirations are low: 8% overall, 4% for tenants with disabilities, reflecting disparities.

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%).

Tenant-Landlord Interactions Matters

- 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.

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.

Renter Ratings Matters

- 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).

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).

Top Recommendations:

1. **Increase housing affordability and security:** more social/affordable homes, stable rent policies and welfare support.
2. **Improve housing quality:** timely repairs, adaptations and tackling hazards like damp and mould.
3. **Enhance tenant engagement:** inclusive strategies and person centered approaches, including increasing face-to-face consultations and regular feedback channels.
4. **Tackle renting stigma:** public awareness campaigns and tenant advocacy services.
5. **Invest in community wellbeing:** reduce anti-social behaviour, improve infrastructure and support landlord-community collaboration.
6. **Inform policy:** ensure tenant voices influence housing, health and community decisions, particularly ahead of elections.

There is no 'one size fits all approach' to these recommendations and their successful implementation requires multi-agency working across the sector and most vitally, meaningful co-production with tenants. We hope that insights such as this Tenant Pulse report will continue to feed into creating a more equal renting experience and representation of renters in Wales and thank our stakeholders, partners and respondents for their ongoing support.

Acknowledgments

Author: Olivia Browne

Supported by: David Wilton, Iona Robertson, Akshita Lakhiwal

We want 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 the Welsh Government for part-funding TPAS Cymru as an organisation and Wales & West for the year-round lead sponsorship.



TPAS Cymru has supported tenants and landlords in Wales for over 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 the 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. It's been created by TPAS Cymru and is supported by the Welsh Government. We aim to:

- i) Find out what matters most to tenants.
- ii) Release regular surveys.
- iii) Hold prize draws to reward people who take part.

The results of our surveys are used by decision makers to create housing policy that works for tenants and helps make housing in Wales safer and fairer.

Tenant Voice sponsor



Tenant Pulse is part of a programme of work to amplify tenants' voices. We are very grateful to Pobl Group, which sponsors this work.

To meet one of our team to discuss the points raised, please contact Olivia Browne, olivia@tpas.cymru

1. Context Matters

The past year has been one of significant change for Welsh housing. Tenants continue to face the effects of the cost-of-living crisis, rising energy bills, and pressures on public services, all of which impact their daily lives. Underrepresented groups are disproportionately impacted by these circumstances and are often unheard.

Social landlords, private landlords and local authorities are operating within a shifting policy landscape. One which is striving to strengthen tenant rights, improve housing access, address hazards and stabilise rents, in the backdrop of the ongoing housing emergency.

Four key developments have shaped this context and set the scene for the 2025 Tenant Pulse- tenant social economic changes.

1. **Commitment to social and affordable housing delivery:** The Welsh Government has renewed its focus on increasing the supply of affordable homes. While progress is welcome, demand continues to heavily outstrip supply in many areas. This demonstrates an underlying persistent problem.
2. **Rent policy reforms:** The Rent and Service Charge Standard sets parameters for social rent and service charge increases, aiming to provide certainty, fairness, and transparency. Private sector tenants, however, continue to face uncertainty about rent stability. Welsh Government have recently looked at private sector rent control models under a Green & White Paper over the last few years but that was scrapped as housing stakeholders disputed the benefits, impact and consequences.
3. **Housing hazards consultation:** In May 2025, Welsh Ministers consulted on a WHQS23 rule requiring social landlords to respond to damp, mould, and other HHSRS-defined hazards. The rule would mandate landlords to publish response times and report performance as part of WHQS compliance, following the example of England's Awaab's Law, introduced after the tragic death of two-year-old Awaab Ishak due to mould-related health issues in social housing.
4. **Upcoming Senedd Elections in 2026:** The political landscape in Wales will be changing soon and we wanted tenants' broader views on Welsh matters.
5. **Polarisation of politics:** In this environment of change, capturing tenants' voices is not only important, but vital. As the housing crisis intensifies and social, economic, and demographic pressures grow, political debate in Wales is becoming increasingly contested and divided. The use of social media is often fuelling the spread of misinformation, and the rise of artificial intelligence is only making the issue more challenging.

2. Methodology Matters

2.1 Survey approach

This survey was designed and conducted online with open access via QuestionPro. Questions consisted of the following themes: demographics, home experience and values, satisfaction, community, and identity. All of which have been themed into different 'Matters' for the basis of this report. It comprises of qualitative and quantitative data.

New this Time:

- The survey language options to ensure inclusivity were **English, Welsh, Polish, Punjabi, Romanian and Urdu**, based on these being the top 5 most spoken languages in Wales¹. We had 15 responses in Welsh and 1 in Polish. More efforts will be done to promote this to multi-language speaking communities.
- It was tested and feedback was given by TPAS Cymru's Pan-Wales Tenant Advisory panel (TPAG) by 22.10.2025 and the survey was launched publicly on the 24.10.2025.
- We also did take into consideration questions from other stakeholders, including Community Housing Cymru (CHC) who heavily influenced questions 9 and 18. There is also broader referencing to other research in the field to enhance credibility.
- Additionally, this year we wanted listen better and to give an opportunity to take part in specific, dedicated follow-on focus groups for underrepresented groups to hear their voices. This is to enhance our understanding of groups who are not thoroughly represented in this survey and in wider research data. These will run beginning in the next quarter. This was promoted both in the survey (Q20) and we were delighted it generated a high response rate, with 177 selecting the option to be contacted.

Survey incentives:

All respondents were given the incentive to enter a prize draw for the option to win a £25 multi-store voucher. This is a change from previous years' prize draws being 'Welsh Food Goods' based on it being more appealing to generate responses and appropriate given the high costs of living.

Survey Promotion:

The following methods were used to promote this survey: Social media posts on Instagram, TikTok, LinkedIn and Facebook, using the catchy slogan '**Home Sweet Home: How's Yours?**'. Promotion of the monetary voucher was also advertised.

¹ [Language, England and Wales - Office for National Statistics](#) (2021)

- Paid adverts via Meta platform (Facebook and Instagram primarily) to target those who rent privately.
- Emailed contacts from our Pulse database, our membership networks and reached out to encourage representatives from Diverse groups.
- We promoted this survey at our in-person Annual Conference.

2.2 Target population

Our target population consisted of adults (18+) who rent in Wales. This included those who rent in the private and social sector.

- **Social renters:** those who rent from Local Authorities, Housing Associations and Supported Living as 'Social Housing/ Social renters. We recognise that there are differences in the level of support and focus provided but do not have enough respondents from supported housing to gather significant information.
- **Private renters:** Those who rent from private landlords e.g., via a letting agent, student halls or directly from a landlord.

2.3 Terminology Matters:

- We expanded the options available for respondents to describe either themselves or anyone within their household to belong to any underrepresented groups listed within the demographic this year to include '**neurodivergent**', '**older person**' and '**women**' to ensure accurate representation.
- The full term '**Black, Asian and Minority Ethnic**' was used to ensure broader representation, replacing 'Black and Minority Ethnic'.
- **Older people** are classified as belonging to the age ranges of 56-65 and those 66+.

3. Demographic Matters

770 people responded to this survey, an overall increase of 26.2% from 2024's 610 respondents. This section provides us with a snapshot of demographics of respondents, including:

- Tenure type,
- Regional
- Age
- Living situation
- Underrepresented groups, sources of income and limitations of the data.

3.1 Tenure Type Matters

- **Housing Association:** 61%
- **Local Authority:** 16%
- **Rent from a private landlord:** 21%
- **Out of those who rent privately,** 46% rent from a **letting agent** and 54% rent directly from a **landlord**.
- **Supported Housing:** 1%

When comparing with 2024 figures, there's an increase of 5% of responses from social housing (Local authority, Housing Association and Supported Housing combined) and a decrease of 4% of renters from the private sector. The private renter split of fairly equal split of for renting via a Letting Agent versus directly from a landlord has continued for a number of years now.

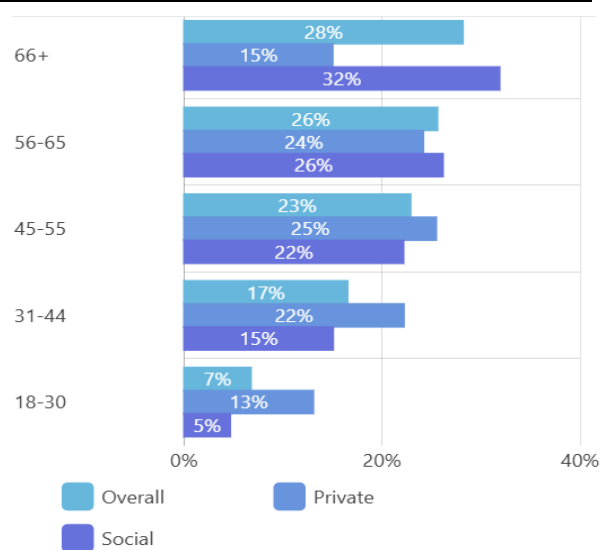
3.2 Regional Matters

- **South East Wales:** 37%
- **South West Wales:** 30%
- **North Wales:** 19%
- **Mid & West Wales:** 14%
- **Other (outside of Wales)** 0.4%

This correlates with previous years as our highest respondent areas are those with the highest levels of population densities. In comparison to 2024, there are no statistically significant differences to note in regional disparities overall.

3.3 Age Matters

- Overall, most respondents are aged 66+ (28%), which is unsurprising when framed in the broader context of Wales's Ageing population².
- The response shows social renters skewing older (32%) and Private renters more evenly distributed.
- There were higher numbers of private renters in the under 30s category (13%), compared to 5% of social renters. The visual data reveals a consistent pattern of social renters belonging to older age groups.



3.4 Living Situation Matters

- Most respondents report living alone overall (41%). When broken down, private (27%) and social housing groups (45%) show similar patterns of solo living.
- There were higher numbers of private tenants who described themselves as being a single parent living with children (16%) than social renters (12%).
- Private renters were also more likely to be living with friends/ housemates than those in social homes, particularly those under 30 years of age.

3.5 Underrepresented Groups Matters

We asked renters: '**Do you or anybody in your household consider yourself to belong to any of the following under-represented groups? (click all that apply)**'.

The table demonstrates below demonstrates the breakdown:

Group	Overall %	Social Housing	Private Rental Sector
None of these apply to me	12.7%	11.7%	15.5%
Women	20.2%	18.7%	27%
Black, Asian and Minority Ethnic	2.8%	2.6%	3.2%
LGBTQ+	4.9%	4%	8.8%
Neurodivergent	8.9%	8.4%	11.2%
Older person	16.8%	18.3%	12%
Carer	7.6%	2.9%	6.4%

² Older People's Commissioner for Wales 'Understanding Wales' ageing population: key statistics' [221222-Understanding-Wales-ageing-population-24-November.pdf](#) (2024)

Disabled and/or sensory loss	23.2%	26%	12.4%
English is not my first language	1.3%	1.1%	2%
Other ³	1.5%	1.3%	1.2%

The findings show clear differences in how underrepresented groups are distributed across housing tenures.

- Disabled respondents make up the largest identified group overall (23%), with an even higher proportion in social housing (26%).
- Women represent 20.2% overall but rise sharply to 27% in the private rented sector. LGBTQ+ (9%) and neurodiverse participants (11%) also appear more frequently in the private rented sector.
- Conversely, older people (17%) and carers (8%) are more common in social housing than in private renting.
- Groups with lower overall representation, such as those from Black, Asian and Minority Ethnic backgrounds (3%) and people whose first language is not English (1%), remain relatively consistent across sectors, with very slight differences.

3.6 Sources of Income Matters

Sources of income offer insight into more than just how people earn money. They depict a broader picture on how people keep a roof over their heads and survive on a day-to-day basis.

Welfare Matters

- Key findings show that Universal Credit and other welfare benefits are the main income source for 38% of households overall. There was an increase of 2% from 2024 for those stating Universal Credit and welfare payments as their main source of household income overall. However, we recognise that the picture is complex and some tenants may not want to disclose this matter.
- Those with the highest levels of welfare as the main source of income were: Carers (61%), those with Disabled and/or sensory loss members (60%), in addition to Neurodiverse households (59%).

Work related-income matters

- In contrast, work-related income dominates among private households (68%), while welfare is the primary source among social households (44%).
- 52% of the older people in this sample were mainly reliant on retirement income (46%) followed closely by welfare payments (30%). This could be challenged as there is no distinction between state pension contributions versus work-related pension contributions.

³ Those who selected other elaborated 1 noted having a brain injury, 4 noted chronic health conditions and 3 cited mental health issues.

Limitations

- The survey was conducted online, which may exclude people with limited digital access or skills.
- As a voluntary survey circulated mainly within social housing networks, responses are skewed: 78% of renters surveyed are social housing tenants, which is not representative of national renting patterns.
- Respondents from Black, Asian, and Minority Ethnic backgrounds remain under-represented compared with the 6% Wales-wide population figure.
- Due to the unique cultural nature of Gypsy, Roma & Irish travelling communities and tenancy, these communities do not conform to many of the questions in relation to tenure in this survey and therefore are not represented thoroughly as a result.
- Some tenure types, including supported housing, limit comparative analysis.
- Not all questions can be compared with last year (e.g., living situation), though this will be standardised for future surveys.
- Comparable year-on-year questions include satisfaction, landlord priorities, affordability, community, and household.

FINDING MATTERS



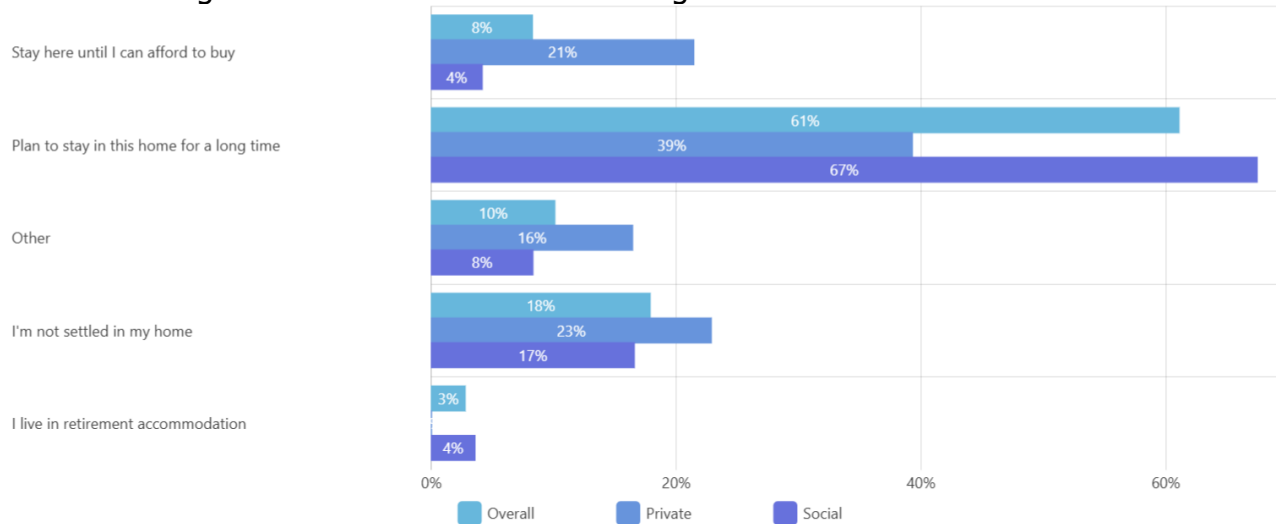
4. Home Matters

In this section, we examine:

- Home Priorities
- Affordability
- Home Improvements

4.1 Renting Situations Matters

Home is a vital part of our lives. We asked renters how they would describe their current renting situation and found the following:



Long-term renting remains most popular

The majority (61%) describe planning to stay in their homes for a long time. However, the tenure divide shows the difference with only 39% of renters in the private sector choosing this answer, in comparison to 67% of social housing renters. This could potentially reflect the more prominent older age demographic present in social housing who are more likely to want to settle in their homes for longer. On the other hand, it could be due the fact that social homes are becoming increasingly more difficult to obtain due to increasing demand outstripping supply, as 94,000 households in Wales are waiting to be allocated a social home⁴.

This may explain why those in social homes view them as a more permanent type of tenancy and are therefore feel more secure than those the private rental market. Overall, there was an increase of 6% of respondents choosing this option compared to last year, suggesting a shift in acceptance of long-term renting becoming a reality.

⁴ Shelter Cymru (2025) '94,000 households in Wales – that's one in every 14 – are stuck waiting for a social home'

Renting Insecurity remains

However, the second most popular answer was “I’m not settled in my home” (17%). When looking closer, the qualitative data from this section revealed the main themes behind this answer as being:

- a) **Damp and disrepair- including health and safety issues because of this**
- b) **Affordability issues**
- c) **Home is unsuitable for needs e.g. size, disability, age**
- d) **Anti-social behaviour**
- e) **Tenure insecurity**

Eviction insecurity in private housing: Private renters in this survey repeatedly mentioned the instability of not knowing when their landlord will be asking them to leave and the uncertainty. Landlords in Wales can still issue “no-fault” evictions, but only under Renting Homes (Wales) Act 2016 (using a Section 173 notice), and only if they give at least six months’ written notice and the tenant has lived there for at least six months⁵.

Poor housing, whether due to damp and disrepair, affordability pressures, homes that do not meet accessibility or space needs, or anti-social behaviour, can all significantly undermine people’s sense of stability and negatively affect their mental wellbeing.

The relentless toll on wellbeing is more than just inconvenient - for some tenants it is proven devastating. One individual reflected: **“Living here affects my mental health, causing suicidal thoughts, yet there is nowhere appropriate to transfer to.”** That testimony reveals a stark reality.

Tenants from Black, Asian, and Minority Ethnic (BAME) households were more likely to report not feeling settled in their homes by 6% compared with the overall sample, indicating higher levels of housing insecurity. This reflects broader structural inequalities in the housing sector, including systemic racism, which contribute to disproportionate outcomes - such as Black, Asian and Minority Ethnic households being three times more likely to experience homelessness than White households.⁵

Additionally, LGBTQ+ respondents also showed disproportionate levels of household insecurity, with this group also being 6% more likely than the overall sample to select this option. According to broader research⁶, this group is more likely to experience housing insecurity, homelessness and more likely to face discrimination from landlords ⁶.

⁵ **Welsh Government.** (2025) *Homelessness and Social Housing Allocation (Wales) Bill: Integrated Impact Assessment*

⁶ UK Collaborative Research Centre for Housing Evidence (2025). *Addressing LGBTQ+ homelessness through inclusive services*

Aspirations of home ownership versus reality of affordability

Only 8% of all renters in the survey said they plan to rent until they can buy, the same as 2024. As expected, Private tenants were more likely to say they were staying in their property until they could afford to buy (21%), with many of these (40%) being those under 30. The goal of home ownership was almost half of this for social renters under 30 (21%).

However, for those who selected this option across tenures, they highlighted the difficulties of getting on the property ladder while renting. These including:

- high rent in their current property
- house prices in their area being too expensive
- high living costs overall.

Respondents who lived on their own, or were single parents living with children or those with partners and child/ children gave comments in the qualitative data alluding to these issues:

- **"Single wage and high cost of living is making it impossible to get on the ladder, hard to save"**
- **"Would like to own a house. Something to pass to the kids. Having enough money for a deposit is almost impossible. It's too expensive to live in UK"**
- **"I have childcare and caring responsibilities, on a very low income and unemployment. Too difficult to save a deposit- Being a single woman it's very unlikely I will be able to secure a mortgage on a single income."**

For all tenants who selected themselves or someone in their household as having a disability/and or sensory loss, this figure of home ownership aspirations was halved to 4%. This correlates with broader data that disabled people were more likely to live in social housing and less likely to own their own home compared to non-disabled people⁷. This data conveys that disabled renters are impacted disproportionately by the increasingly unaffordable concept of home ownership in the current climate.

Lack of control and significant impacts of poverty matters:

An overarching theme across all answers was a sense of powerlessness within the renting experience, even among those who described themselves as settled. Many tenants felt that their stability was conditional and could be disrupted at any time by rising costs, landlord decisions, or unresolved repair issues.

"We are happy here but buying is the only way of achieving housing security."

⁷ Welsh Government (2021) statistics. Disabled people's outcomes in health, housing, education, and economic status.

This sentiment is consistent with wider research showing that poverty restricts tenants' housing choices and exposes them to greater housing insecurity. National studies⁸ have found that low-income households are far more likely to remain in homes that do not meet their needs, experience limited mobility within the housing market, and face higher risks of poor-quality or unsuitable accommodation.

These pressures compound the feeling of having **"no choice"** was mentioned repeatedly by respondents and leave many tenants unable to move to safer, healthier, or more appropriate homes. One respondent commented: **"My home is not really suitable for my age and disabilities, but it is all I can afford until I can move into retirement accommodation."**

Tenants in our survey conveyed feelings of powerlessness and a lack of control, **"I'm trapped by poverty"**, with many respondents in the social sector also naming their housing associations or Local authorities as ignoring concerns about Anti-Social Behaviour despite them reporting it.

The findings demonstrate that the consequences of poverty, insecure tenure and lack of control extend far beyond affordability alone. They determine whether tenants can live at all, shape how safe and secure they feel, and strip many of any real agency over their homes, with profound and damaging effects on their mental health, stability and dignity.

4.2 What Matters Most in the home:

⁹We asked tenants to rank the statements given regarding what matters the most to them, 1-6 in preference order, 1 being most important. The data shows that all tenants ranked the below in order of importance:

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

⁸ Joseph Rowntree Foundation (2024) UK Poverty 2024.

⁹ This question was developed in partnership with Community Housing Cymru (CHC), a key stakeholder within the social housing sector.

For this question, social renters had the same pattern of answers as overall respondents regarding order of importance as noted above.

For Private Renters, Rent Matters Most:

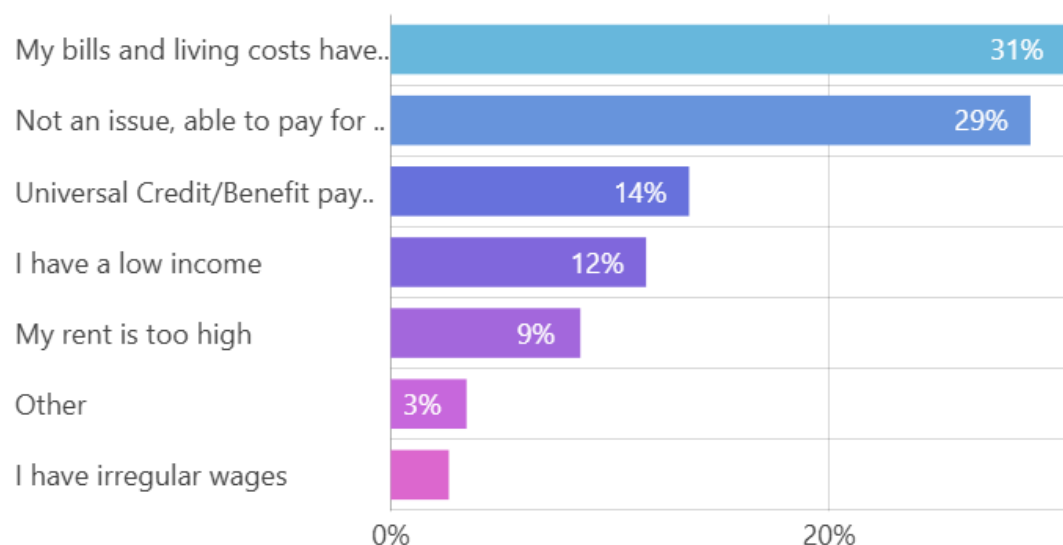
However, for private renters, there were significant differences ranking:

- 1.How much my home costs to rent
- 2.Keeping my home safe, warm dry and comfortable
- 3.Feeling safe and secure in my home
- 4.Getting repairs and maintenance done quickly when something breaks
- 5.Living in a home that uses less energy and costs less to heat
- 6.Having enough space for everyone in my household

These findings demonstrate that while all tenants prioritise safety, warmth and security in the home above all else, private renters place affordability as their highest concern, highlighting the sharper financial pressures experienced in the private rented sector. Social renters are guaranteed more certain and regulated rent rises in comparison to the more unpredictable hikes which occur in the private rental market.

4.3 Affordability Matters

Being able to afford rent and bills are vital elements of existing as a renter. We asked renters about if they struggle to pay for their rent or bills and if this is the case, why.

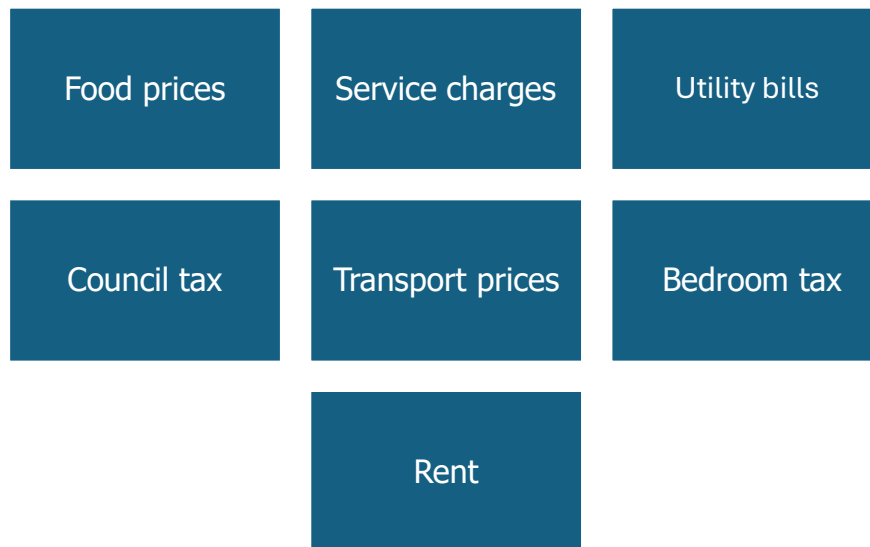


- Most struggle due to increased bills/living costs (31%), and looking at tenure type breakdowns, social renters were least impacted by rent levels (6%), and private renters were most affected by high rent (16%).
- Compared to last year, there has been a 20% decrease in those selecting the option 'not an issue, able to pay for both', suggesting less tenants are able to afford their rent and bills.
- Renters whose main household income was cited as being generated from work were more likely than others to choose this option, but only by 1%. However, only 23% of private renters selected this option, compared to 30% of social renters, indicating at wider issues of affordability within the private rental sector as referred to throughout this report.
- We found that those who were either single parents living with children or living with partners and children only 24%, less than the average, chose the option that they do not have any issues paying for rent and or/bills, alluding to wider implications of affordability for families trying to make ends meet.

Rising bills and cost of living matters:

The most selected option to this question was 'My bills and living costs have increased' (31%). This is down 11% from 2024, but nevertheless, it clearly remains a persistent answer for many renters and reflects the ongoing impacts of the high costs of living.

In the dynamic text box option, for those who selected the reason that their bills and costs of living have increased are a main reason for them struggling to pay their rent or bills, all the below were listed as increasing:



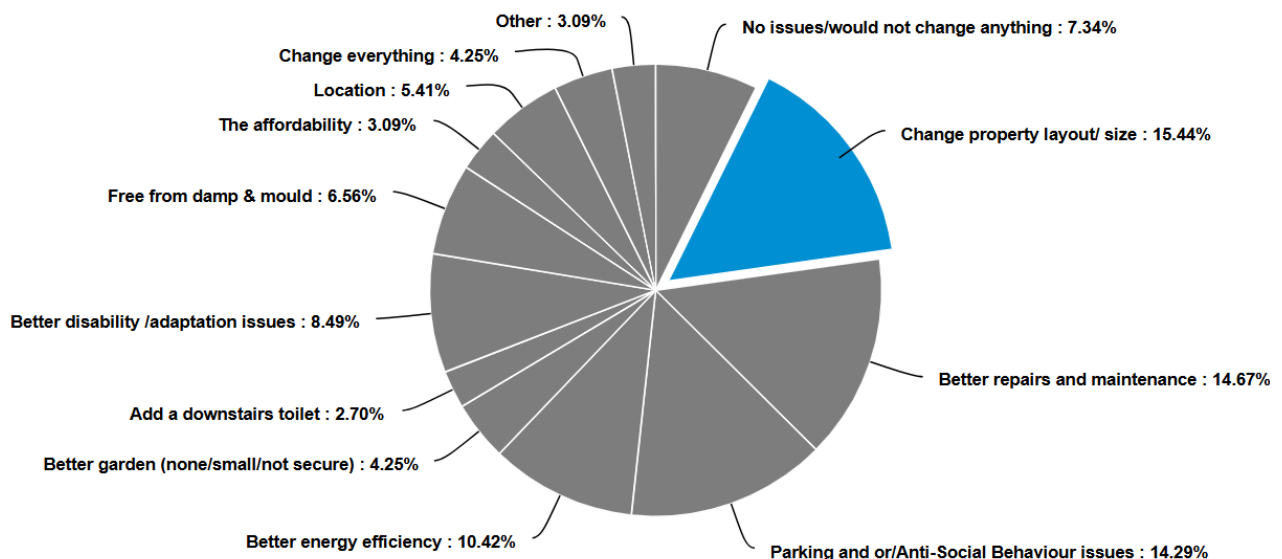
The findings therefore reinforce that for a significant proportion of tenants, it is not only rent increases, but the cumulative rise across living costs, which are driving financial strain.

Universal Credit and Welfare payments matters:

- Social tenants were more likely than those in the private sector to say their Universal Credit or welfare payments are too low - and that this is a key reason for difficulty paying bills.
- Households including individuals with a disability or sensory loss, single parents with children and older renters are especially likely to attribute struggles paying rent or bills to low benefit payments.
- People living with a partner and children, or single parents with children, were more likely than the overall sample to select this option, perhaps pointing to broader issues with the welfare system and child poverty. The recent decision to scrap the two-child benefit cap will bring support to around 69,000 children in Wales, a move expected to reduce child poverty there by 3 - 4 %¹⁰. However, many tenants with children (including those with two or fewer) will still need improved benefit adequacy and living-standards improvements overall before that support makes a real difference, as many slip through the net.¹¹

4.4 Home Improvement Matters:

We asked respondents what the **one thing was they would like to change about their home** and found the following:



Most respondents wanted to change:

- **Property layout/ size (15%)**
- **Better repairs and maintenance (15%)**

¹⁰ Welsh Government (2025). [Written Statement: First Minister response to the removal of the two child limit \(26 November 2025\) | GOV.WALES](#)

¹¹ Bevan Foundation (2025) [Why scrapping the two-child limit must be the start and not the end of efforts to end child poverty - Bevan Foundation](#)

- **Parking/ASB ¹² issues (14%)**
- **Better energy efficiency (10%)**
- **Better disability/adaptation issues (8%)**

These close figures highlight just how divided residents are over their priorities and suggests there's no single dominant concern. Instead, it shows a fairly even spread of needs across layout/size changes, repairs, and parking/anti-social behaviour issues. However, private renters placed a higher emphasis on repairs/maintenance (23%) in comparison to 16% of social renters. Social renters were more likely to place a higher emphasis on changing parking/ASB (14%) than those who rent privately (8%). These disparities highlight how tenure type influences which issues are considered most important.

In the previous survey, repairs and maintenance was the top priority (14%), followed by energy efficiency (13%), then layout/size (11%) and parking/ASB (10%), with 10% indicating they would make no changes.

In the current survey, layout/size has risen to join repairs and maintenance as the top concern. Parking/ASB has also increased in prominence. Meanwhile, concern over energy efficiency appears to have slightly decreased relative to other issues and the proportion reporting no desire for change has dropped - such that "no issues" no longer features among the top five.

Potential implications for landlords:

- **Private landlords:** Need to manage affordability pressures, maintain properties to a high standard, and respond promptly to repair and ASB concerns to retain tenants and reduce turnover.
- **Social landlords:** Should focus on long-term tenant wellbeing, addressing repairs, anti-social behaviour, accessibility, and energy efficiency, while maintaining regulated rents to provide stability.

¹² ASB is an acronym for 'Anti-Social Behaviour'. It has only been acronymised for the purpose of this graph, not the question itself.

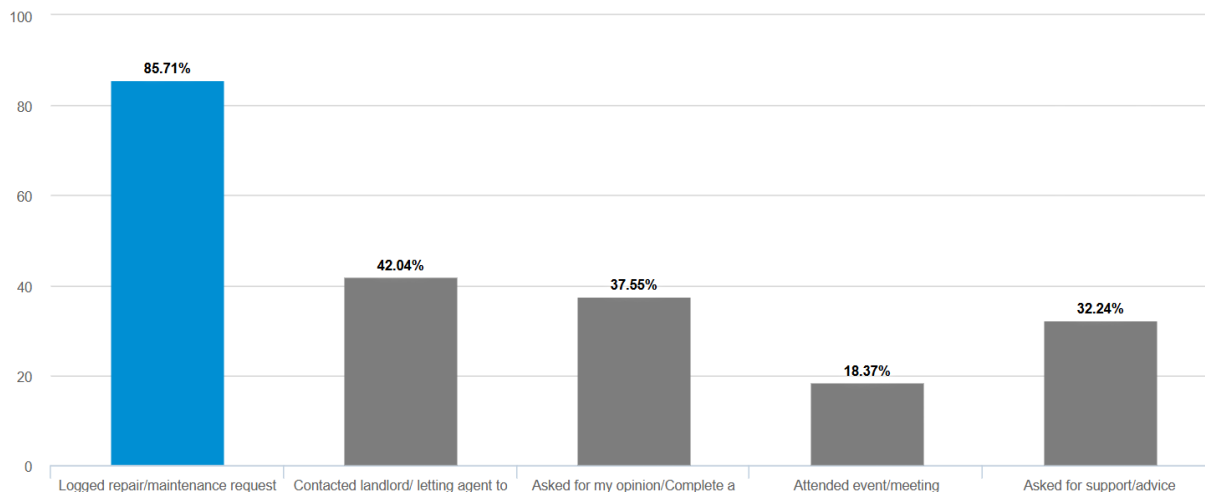
5. Landlord Interaction Matters

In this section, we cover:

- What interactions renters had with their landlords
- Matters relating to landlord satisfaction

5.1 Landlord and Tenant Interactions Matters

We asked Tenants what interactions they had with their landlord/ letting agent in the last year. They could select all that apply.



Repairs and maintenance dominate interactions:

The main landlord and tenant interactions were: Logged repair/ maintenance request, similarly to 2024 figures. This was prevalent in both social and private renters' selection reinforcing the centrality of property condition in all renters' year-round engagement with landlords.

Survey and opinion requests increasing:

There was a 5% rise from those who selected being asked for their opinion/ to complete a survey, reflective of a year-on-year increase we have seen in our Tenant Pulse that tenants and landlords are interacting in this way. While this growth is slower than the 8% increase observed between 2023–2024, it indicates that landlords are increasingly seeking tenant input, a key step toward more responsive housing management.

Limited face-to-face engagement

Attending events or meetings continues to be the least common form of interaction, unchanged from the previous survey, highlighting ongoing challenges in creating more

personal, meaningful face-to-face engagement opportunities with tenants. Social renters were significantly more likely than their private renting counterparts to attend meetings/ events and to complete surveys.

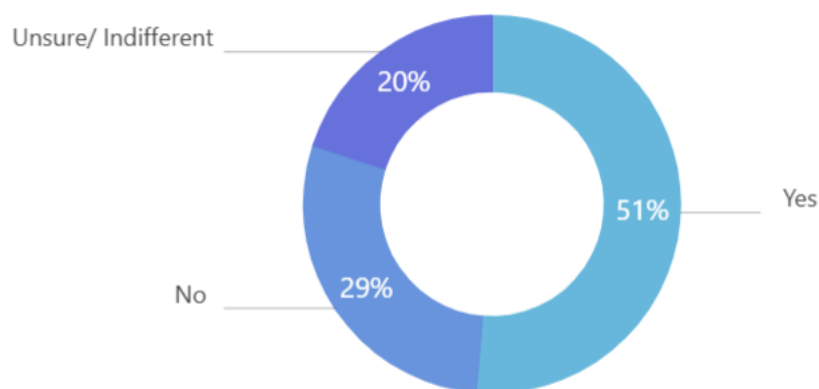
Asking for support/ advice levels increasing

The proportion of tenants seeking support or advice from their landlord has risen significantly by 11% since last year, suggesting an increasing reliance on landlords not just for property issues, but for guidance and assistance in navigating wider housing or wellbeing challenges as evidenced throughout this report. Of these, social renters (21%) were more likely to ask for support/advice from their landlords in comparison to private renters (8%).

Overall, while transactional interactions around repairs remain dominant, there is a clear shift toward more consultative and supportive engagement, particularly in the social housing sector. However, the limited growth in face-to-face interactions signals a continuing opportunity for landlords to build stronger, more personal relationships with tenants.

5.2 Landlord Communication Matters:

This year, we asked tenants if they were satisfied with the level of engagement their landlord provides.



Most respondents reported being satisfied with their landlord's level of interaction. This is an encouraging indication that landlords are maintaining communication and providing responsive support for their tenants.

1.Varied satisfaction rates were found in some (but not all) cases:

However, we found that satisfaction varied depending on tenure type. Social renters were slightly less satisfied, with 29% reporting dissatisfaction compared with 27% of private renters. This highlights that, even within a context of generally positive engagement, a notable proportion of social renters still feel their landlord interactions do not meet their needs.

Households with neurodiverse members reported significantly lower satisfaction levels, with only 39% saying they were satisfied and 41% expressing dissatisfaction. Most of these households were in the private rental sector, highlighting the challenges of engagement in a less structured and more independent setting.

Similarly, households with a disability or sensory loss also reported lower satisfaction, with 45% responding 'yes' and 35% 'no,' indicating that engagement experiences vary across different tenant needs. These findings underscore the importance of tailoring landlord communications and engagement strategies to ensure they are inclusive and accessible, so that all tenants; particularly those with neurodiverse needs or disabilities, are not overlooked.

2. Being Unsure/ Indifferent Matters:

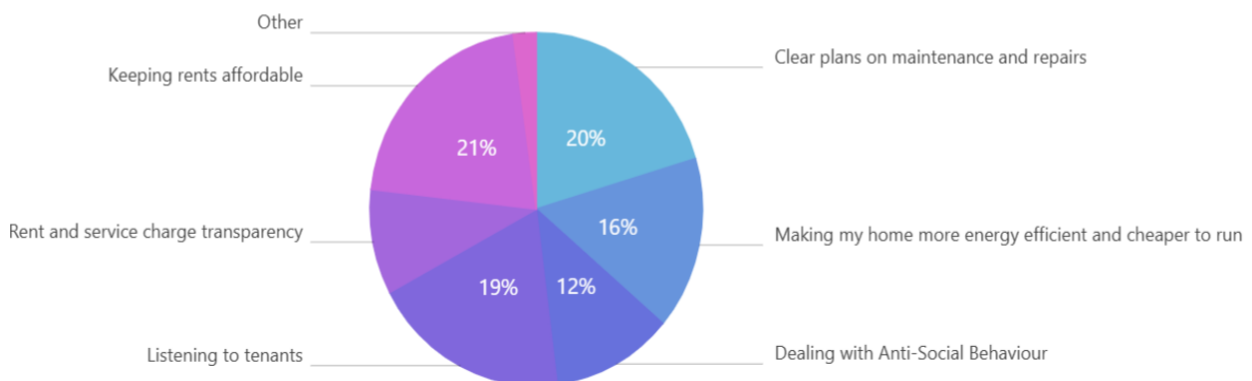
This year, we added an 'unsure/ indifferent' category as 2024 only included the yes/no options. This was clearly necessary as 20% of respondents selected it, indicating that for many, landlord interaction is not something they are either certain of what it entails and/or it is not something they feel strongly about. Black, Asian and Ethnic Minority Households had higher levels of selecting this option (23%).

Younger tenants, particularly those under 30, expressed higher levels of indifference toward landlord engagement than the overall sample, with 30% reporting a neutral or indifferent stance.

This trend was especially pronounced among private renters, suggesting that younger tenants in the private sector may feel less connected to or invested in interactions with their landlords. These findings highlight an opportunity for landlords to explore engagement approaches that better resonate with younger tenants, fostering a stronger sense of involvement and responsiveness.

5.3 Landlord Priorities Matter:

We asked renters what they believe their landlord's priorities *should* be. This helps us understand tenant expectations and identify where landlord focus may need better alignment with what matters most to residents.



It is clear from the data that the three main priorities for landlords according to renters emerged:



1. Keeping rents affordable



2. Clear plans on repairs and maintenance



3. Listening to tenants

This solidifies the message that tenants want landlords to prioritise the fundamentals of safe, well-maintained and affordable homes - core areas that directly shape their daily living conditions and overall sense of security. Additionally, those who rent want to feel heard and place emphasis on landlords to prioritise this. Few disparities were evident amongst social and private in this section to note, presenting an alignment on priorities despite tenure type differences.

Other priorities also matter:

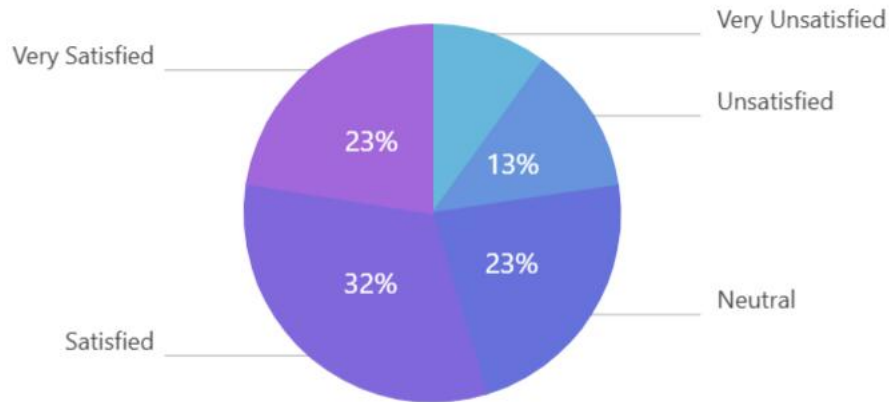
Ranking 4th was making my home cheaper and more energy efficient to run and 5th was dealing with Anti-social behaviour. In the 'other' section, qualitative data revealed:

- Conforming to disability needs and adaptations
- Safety and security
- Increasing housing staff members to fit the demand, recognising the stretched capacity that many who provide homes predominantly in the social rental sector face.
- Abolishing the bedroom tax was also mentioned, which correlates with previous answers (see Section 3.3) on this being a pervasive issue.

These suggests that landlord priorities according to renters are multi-faceted and provides insight to wider issues where renters feel these matters are not deemed as a priority for landlords but should be. It also highlights that being a landlord, either a private landlord or a social landlord, comes with far higher responsibilities than simply renting out a property for someone to inhabit.

5.4 Tenant Satisfaction with Landlords Matters

We asked our respondents to provide their overall satisfaction with their landlord, evidenced below.



- Overall, more than half of respondents (55%) reported being satisfied (32%) or very (23%) satisfied with their landlord, while 23% were unsatisfied (13%) or very unsatisfied (10%).
- Patterns differed by tenure: social renters were more likely to report being “satisfied” (35% versus 22% of private renters), whereas private renters were more often neutral (32% versus 20% of social renters), suggesting that social renters have clearer expectations of landlord performance, while private renters’ experiences are more varied. Both groups reported similar levels of “very satisfied” (22% private, 23% social).
- Notably, underrepresented groups reported higher levels of dissatisfaction: 14% of Black, Asian and Minority Ethnic households, 13% of LGBTQ+ households, 12% of disabled or sensory-impaired tenants, and 14% of carers selected “very unsatisfied.” These disparities indicate that certain groups are significantly more likely to experience poor landlord engagement, highlighting equity and inclusion challenges.

Potential implications for landlords:

While the majority of tenants express satisfaction, these differences by tenure and among underrepresented groups point to the need for landlords to better address the experiences of those most vulnerable to inadequate housing support.

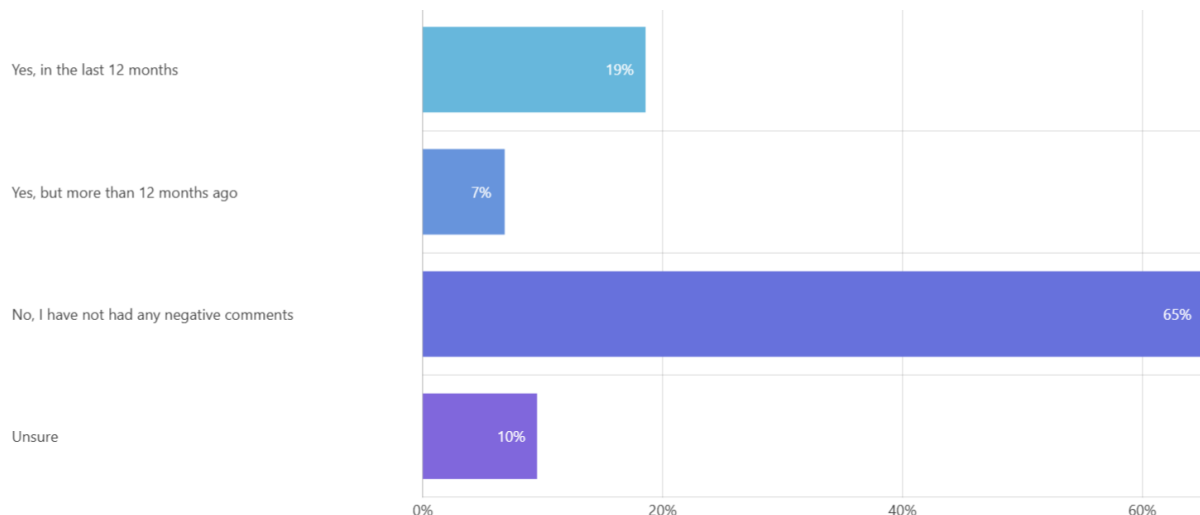
6. Renting Stigma Matters

In this section, we analysed the following:

- If respondents or someone in their household had received any negative comments in relation to being a renter within the last 12 months
- If they answered yes, they were asked about what happened and how it made them feel

6.1 Frequency of renting stigma matters

The graph below shows clear findings in relation to respondents or household members receiving negative comments about renting within the last 12 months:



- Most respondents reported not receiving negative comments about being a renter.
- However, 19% had reported receiving negative comments within the last 12 months.
- When combining those who experienced this within the last 12 months and those who experienced it more than 12 months ago, 26% had encountered negative comments about renting, highlighting that negative comments about renting remain a meaningful issue for more than one in four tenants.
- These experiences do not occur in isolation. They are tied to long-standing policy and cultural narratives that position homeownership as the ideal, with renting framed as a less desirable, temporary, or less secure alternative which persist¹³. This negative framing fuels stereotypes that portray renters as less

¹³ Ministry of Housing, Communities & Local Government (2025) *British Social Attitudes 2023: Public attitudes to housing*.

stable, less committed to their communities, or less financially responsible. Such perceptions can reinforce stigma and undermine the legitimacy of renting as a long-term housing option, despite many people renting out of necessity rather than choice.

- Those who disclosed their main source of income as being generated from Universal Credit/ welfare payments were more likely to have received negative comments about renting, implying how stigmatisation against those who receive welfare can intersect into other types of stigma/ negative comments.
- Additionally, 25% of LGBTQ+ households were more likely to have experienced negative comments about renting within the last 12 months, indicating certain groups with protected characteristics may be more susceptible to receiving negative comments about renting, but more evidence is needed to explore this.

Private Renting Stigma Matters

- Notably, 25% of private renters said they had experienced negative comments about renting in the past year: 8% higher than the 17% of social renters who reported the same. Stigma surrounding social housing is well recognised, for instance, Stop Social Housing Stigma's national tenant survey in England revealed more than two-thirds of social tenants feel stigmatised¹⁴.
- On the contrary, less visibility is given to the stigmas faced by private renters, despite organisational efforts from groups such as Shelter (including Shelter England and Shelter Cymru), ACORN and Generation Rent to bring it into the discourse.
- In the private sector, prejudices often go unchallenged and unregulated, leaving many tenants unsupported in navigating these negative perceptions. These findings highlight this issue.

6.2 Accounts of Incidences of Renting Stigma Matters:

For respondents who reported experiencing negative comments about renting, we asked what had been said and how it made them feel. The accounts shared reveal clear patterns in how stigma manifests across different tenures, highlighting both the prevalence of negative attitudes and the emotional toll they can have on renters. Several key themes emerged from the qualitative responses.

Class-Based Judgements and "Second-Class Citizen" Narratives

Several renters described being made to feel socially inferior because they rent, often reporting clear divisions between homeowners and renters within their communities. Respondents spoke about being treated as **"second class citizens"** or as **"not good enough for the housing estate,"** with some homeowners expressing the view that renters **"lower the tone."** For some social renters, this took the form of being labelled collectively as **"them up in social housing."** These

¹⁴ Inside Housing (2025)

accounts point to entrenched social hierarchies around tenure and a persistent belief that homeownership confers greater legitimacy and status.

Moral Judgements About Hard Work, Success, and Failure

Several respondents described comments that implied renting reflects a lack of ambition, insufficient effort, or general personal failure. Some reported being told they **"don't work hard enough to afford to buy,"** or that not owning a home by their 30s meant they had failed in adulthood. These sentiments were often listed as coming from within their own social networks, e.g. **"We also get the constant 'well, when are you buying a house?' comments and reminders that we need to get a move on as we are in our 30's now from family"**, indicating societal and familial expectations surrounding home ownership.

Others described being labelled as **"scroungers,"** or feeling **"useless"** after being told renting was **"dead money."** Such comments reflect wider societal narratives that equate homeownership with success, while positioning renting because of poor personal choices rather than structural barriers.

Stigma and Prejudice Specific to Social Housing

For many social renters, stigma was more explicit and more severe. Some recounted being called **"scum"** because they lived in social housing or being told they were **"less than"** for renting through a housing association. These incidents demonstrate that social renters often experience a dual burden: both the general stigma attached to renting and the more targeted prejudices associated with social housing. This aligns with wider national findings showing strong and persistent stigma toward social housing communities¹⁵

Perceptions That Renting Is a Financial Mistake

Private renters commonly reported comments suggesting that renting is irrational or irresponsible. Respondents noted being called **"idiots"** for **"paying someone else's mortgage,"** or told that they were wasting money. These judgements overlook the structural realities of the housing market and can leave tenants feeling **"inadequate"** or **"stupid"** for circumstances outside their control. This form of stigma reflects persistent misunderstandings of the financial constraints facing renters.

Personal Attacks Linked to Health, Employment, or Circumstance

A smaller but significant set of accounts described how renting stigma intersected with other forms of prejudice, particularly linked to disability, health conditions, or employment status. One respondent reported being told **"what's wrong with the UK"** and that they were **"draining resources"** because they were unable to work.

¹⁵ G15 Report (2025) Taking the Stigma Out of Social Housing-The resident's view.

Such incidents reveal how renting stigma can compound other vulnerabilities and cross into broader forms of discrimination.

Collectively, these accounts demonstrate that renting stigma remains a significant and multifaceted issue in Wales. Experiences ranged from subtle assumptions to direct verbal abuse, with social renters generally reporting more explicit hostility. These findings illustrate the emotional and social consequences of stigma and highlight the importance of challenging negative tenure-based narratives across policy, media and community settings.

7. 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".

The results reveal the following:

1. Satisfaction with the home is generally high but varies by group. Older people (4.1) and older people in social housing (4.1) give the strongest ratings for "I like my home," indicating high satisfaction. Private renters (3.59) and BAME renters (3.4) report significantly lower satisfaction, showing disparities in housing experience across tenures and ethnic groups.

2. Pride in renting is the lowest-rated statement overall

Across all renters, "I'm proud to rent" scores just 3.5 stars, the lowest of the five statements. Private renters show the least pride (2.8 stars), suggesting weaker emotional or social attachment to renting within this group. Older people in social housing again report the highest pride (3.8 stars), indicating a more secure or stable renting experience.

3. Sense of community is strongest among older people

"Like the community I live in" receives its highest score from older people (3.95 stars). Conversely, Black, Asian & Minority Ethnic renters give the lowest rating (2.9 stars), signalling potential challenges around social integration or perceptions of community support.

4. "I live in a good area" shows a similar pattern

Older people (3.95) and older people in social housing (3.9) again rate this factor most positively. Private renters and under-30s overall provide more neutral scores (around 3.5 stars – 3.8 stars), reflecting a more mixed experience of neighbourhood quality.

5. Perception of neighbours is moderately positive overall

Older people rate their neighbours most favourably (3.79), reinforcing their generally strong sense of place and satisfaction. Under-30 private renters and BAME renters (both 3.4 stars–3.7 stars range) report lower levels of satisfaction, highlighting potential issues around connection or stability in their neighbourhoods.

Key points:

- The data shows a clear pattern: older renters, especially those in social housing, have the most positive views of their homes, communities, and

neighbours, while younger renters, private renters, and Black Asian & Ethnic Minority renters consistently rate their experiences less positively.

- This suggests that security of tenure, stability, and support structures may strongly influence satisfaction within the rental sector.

Potential Implications for landlords:

Social landlords: Should prioritise engaging younger and Black, Asian and Ethnic Minority renters to understand and address the specific issues that lower their satisfaction, belonging, and pride — whether that's through community-building activities, improved communication, or culturally responsive support.

Private landlords: Need to recognise that private tenants, especially younger and Black, Asian and Ethnic Minority renters, often feel less settled and less proud of their housing; maintaining good property standards and offering stable, long-term tenancies where possible may help improve their sense of home and community connection.

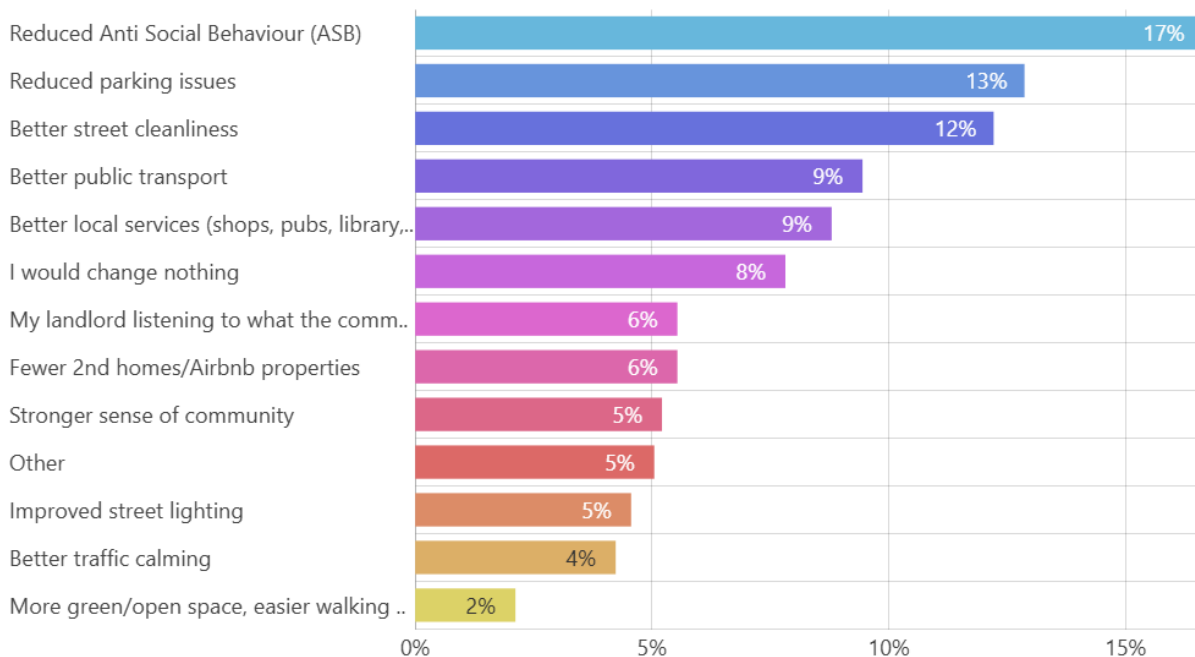
8. Community and National Tenant Voice Matters

In this section, we examine:

- What the one thing renters would change about their local communities
- Which of the following they thought were the most important issues facing Wales and your local area at this time? Please tick up to three.

8.1 Community improvement matters

We asked tenants what the one thing was they would change about their local community to see what mattered most to them in this context.



The data shows a strong emphasis on *community safety*, *basic infrastructure*, and *neighbourhood quality* as the most important community improvements for renters in Wales.

1. Anti-social behaviour (ASB) is the leading concern (17%)

This represents the single most prominent issue renters want addressed. The high percentage suggests that safety, neighbourhood behaviour, and community cohesion are key pressure points for many households.

- Renters in social housing were 7% more likely to select this option than their private renting counterparts, implying that it is seen as higher priority within the social housing community.

- ASB consistently appears across our previous Tenant Pulse data as the main driver of dissatisfaction, indicating a need for stronger partnership working between landlords, local authorities, and community safety teams.
- It is also recognised as a national issue, as the Crime Survey for England and Wales data reported that 25% of people viewed antisocial behaviour as a major local problem in the year ending June 2024.¹⁶

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

- These concerns reflect the practical, day-to-day challenges renters face. The prominence of parking frustrations (particularly relevant in denser urban Welsh communities) suggests that environmental and planning pressures are directly affecting quality of life.
- Street cleanliness ranking nearly as high reinforces that renters are focused on visible, tangible elements of neighbourhood upkeep that shape how safe and cared-for their communities feel.

3. Public transport (9%) and access to local services (9%) remain important structural needs

- These responses highlight the importance of connectivity and local infrastructure. Reliable transport and accessible community services underpin social participation, employment and wellbeing. All of these are areas that renters, often more financially constrained, rely on heavily.

4. A notable minority (8%) would change nothing

- This group, while relatively small, signals that some renters feel broadly satisfied with their local areas. This could indicate stronger neighbourhood cohesion or better baseline conditions in certain regions or tenures.
- Private renters (12%) were more likely to select this option than those who rent socially (8%). This number of respondents who selected this option has reduced by 4% since 2024, highlighting the desire to change nothing and therefore being satisfied overall has decreased.

5. Lower-ranking priorities still highlight concerns

- ***"My landlord listening to what the community wants" (6%)*** highlights a desire for stronger influence, accountability, and two-way communication with housing providers. Notably, no private renters selected this option, indicating that this issue is far more relevant to social renters, who are more directly affected by the decisions and priorities of larger, community-facing landlords. This distinction is unsurprising: private landlords typically operate on an individual basis and have limited involvement in shaping or responding to community needs. Social Housing providers, on the other hand, play a more visible role in neighbourhood planning, investment, and engagement.

¹⁶ Crime Survey for England and Wales (2025) Crime in England and Wales: year ending June 2024

- **"Stronger sense of community" (5%)** shows that, when asked what one thing they would change about their local area, many people prioritised better social connection and neighbourliness. This was chosen more often by social renters than private renters, suggesting that those in social housing may feel a greater gap in community cohesion or local support networks.
- **"Fewer second homes/Airbnbs" (6%)** reflects wider concerns about housing scarcity and the pressure that short-term lets place on rural and coastal communities. The Bevan Foundation's 2022¹⁷ report highlights this clearly: Wales had over 21,700 Airbnb listings, with around 14,300 suitable for long-term living, which shows how these temporary lets effectively removing a significant number of potential homes from the year-round housing market.
- This impact is most acute in rural areas, where Airbnb-suitable homes amount to nearly a third of the private rental stock. This shows why respondents in rural regions (8%) were more likely to prioritise fewer Airbnb's than those in urban South East Wales (0.5%), and why this issue matters far more to private renters (15%) than social renters (3%). Private renters are more exposed to rising rents and reductions in available long-term lets as properties shift to more profitable holiday-let use.

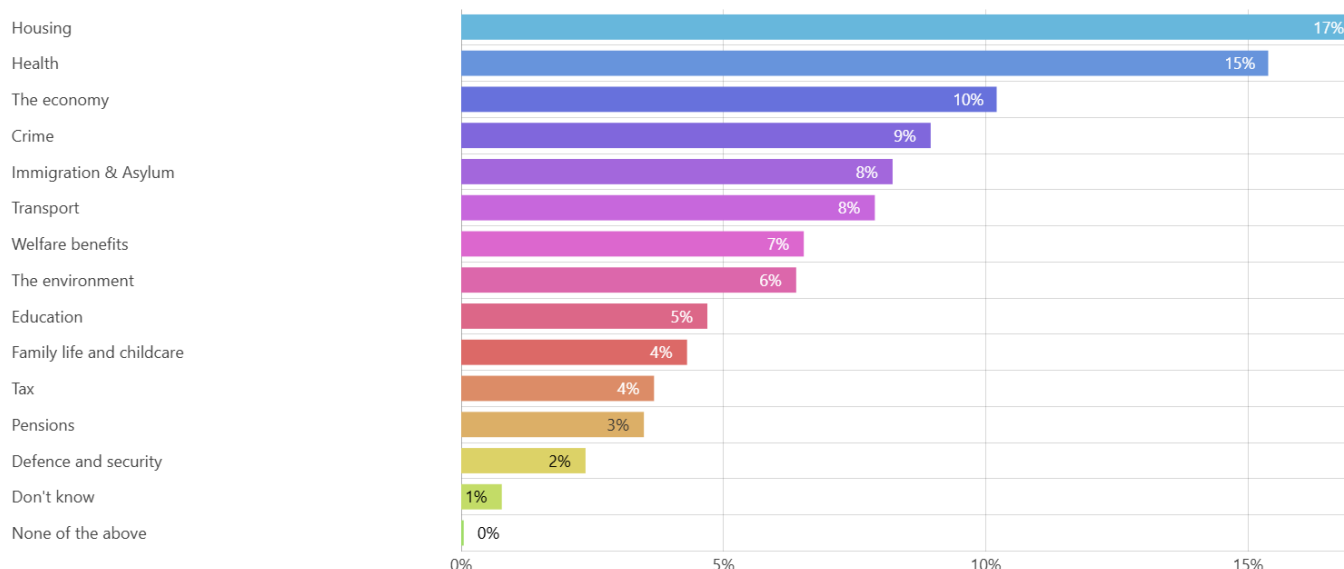
6. Environmental and streetscape improvements

- While street lighting (5%), traffic calming (4%), and green space (2%) rank lower, they still matter collectively and individually. These represent the broader amenity and safety concerns that shape how safe, accessible and walkable communities feel.

¹⁷ The Bevan Foundation (2022) Report: Holiday lets and the private sector.

8.2 National Tenant Voice Matters:

This section looks beyond the home to neighbourhood wellbeing, public services, safety, and wider Welsh issues, offering insight ahead of the 2026 Senedd Elections. The survey asked respondents to select up to three issues they consider most pressing for Wales today.



- As shown in the graph above, housing emerged as the top issue, followed closely by health and the economy. It must be taken into consideration that this survey focused on renters and was widely shared within the housing sector; and therefore, more likely to generate answers from those who care about housing as a topic.
- However, these findings are consistent with wider national research which show many people view housing as a priority. Shelter Cymru's¹⁸ 2025 poll, which was conducted with YouGov, revealed that 23% of adults in Wales selected housing as one of their top three priorities, making it joint third overall with education. Health was first and the economy ranked second as key concerns among the general public.
- This alignment suggests that the emphasis placed on housing by our respondents reflects not only their individual experiences, but also broader, population-level challenges related to affordability, security, and supply.

Private and social renter differences matter:

- Private renters were more likely to choose housing as a main issue (22%), in comparison to 15% of social renters. For both renting groups, housing remained the most chosen issue, followed closely by health.
- Nonetheless, some differences were evident. Social housing renters placed crime as their third priority (10%), followed by the economy (9%). Contrastingly, private renters chose the economy as third (15%) and crime

¹⁸ YouGov/ Shelter Cymru (2025) results

ranked significantly lower than those in social housing as sixth (6%). This is potentially indicative of the concerns around anti-social behaviour in this survey, which were predominantly voiced by social renters.

Other matters:

- Immigration was the fourth most selected issue in our survey (8%), with social housing tenants more likely to prioritise it (9%) than private renters (5%). This reflects broader public concern often amplified by misinformation about social housing eligibility - for example, Trivallis Housing Association recently clarified that new homes were allocated via the local housing register, not to asylum seekers or recent migrants¹⁹. While immigration remains a major issue in UK politics, local concern in Wales is lower, with only 26%²⁰ identifying it as important in their communities. Our findings show that, for tenants, immigration is a concern but ranks below housing, health, and the economy.
- Transport and welfare benefits followed closely behind, indicating that tenants are concerned with broader issues affecting their daily lives and financial stability.

Understanding the issues tenants see as most important helps inform policy priorities and political focus. Overall, the survey shows that tenants view housing as the most pressing national issue, followed by health and the economy, reflecting both their personal experiences and wider population-level concerns around affordability, security, and supply.

Implications:

- **Policymakers:** Focus on ASB reduction, safety, local services, and rural housing supply.
- **Social landlords:** Engage communities, address ASB and misinformation, strengthen neighbourhood cohesion.
- **Private landlords:** Collaborate with authorities on safety, maintain property standards, and support stable, well-serviced communities.

¹⁹ Housing Today. (2025). Welsh social landlord hits back at false information about who it houses

²⁰ Nation.Cymru (2025) Polling shows immigration concern manufactured, say campaigners.

Conclusion: You Matter

The 2025 Tenant Pulse survey highlights the complex realities of renting in Wales today. Tenants' experiences are shaped not only by the homes they occupy 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 backgrounds.

Key insights include:

- **Housing security and affordability** remain paramount, with private renters disproportionately affected by high rent and cumulative living costs, and social renters facing long waiting lists and limited housing options.
- **Tenant wellbeing** is impacted by housing quality, disrepair, and environmental factors, including anti-social behaviour. This highlights the importance of repairs, adaptations, and anti-social behaviour management.
- **Tenant voice is gaining traction**, with increased engagement through surveys and advice requests, yet face-to-face interactions and tailored communication remain limited, particularly for younger and neurodiverse tenants.
- **Stigma around renting** continues to affect tenants, with both social and private renters experiencing negative perceptions that reinforce societal hierarchies and prejudice.
- **Community priorities** extend beyond the home, with anti-social behaviour, parking, street cleanliness, and access to services identified as critical to tenants' quality of life.

Overall, the survey demonstrates that tenants want to be heard, valued, and supported. Ensuring safe, affordable, and suitable housing, alongside meaningful engagement and stronger community cohesion, is essential for empowering tenants across Wales.

Author: Olivia Browne

Supported by: David Wilton, Iona Robertson & Akshita Lakhiwal

If you wish to meet to discuss the points raised, please contact:

enquiries@tpas.cymru

Next Steps

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

- 1) All tenants who completed the survey and opted to receive a copy of the report will be sent a copy ahead of publication.
- 2) This report is distributed to key decision makers across the housing sector including Welsh Government, Member of the Senedd (with an interest in housing), Housing CEOs and Heads of Service asking for their consideration and action.
- 3) TPAS Cymru will look for opportunities to present and discuss the findings withing sector and media to ensure stakeholders absorb and act on the report.
- 4) In addition, based on other TPAS Cymru's reports it's 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 results.

References:

Bevan Foundation. (2022). Holiday Lets and the Private Rental Sector. Available at: <https://www.bevanfoundation.org/wp-content/uploads/2022/09/Holiday-lets-and-the-private-rental-sector.pdf>

Bevan Foundation (2025) Why scrapping the two-child limit must be the start and not the end of efforts to end child poverty. Available: <https://www.bevanfoundation.org/views/two-child-limit-must-be-the-start/>

Chartered Institute of Housing (CIH). (2024). Dispelling myths about migrants and housing. Retrieved from <https://www.cih.org/blogs/dispelling-myths-about-migrants-and-housing/>

CIH Cymru. (2025). A plan for housing in Wales: CIH Cymru launches 2026 election manifesto. Available at: <https://www.cih.org/news/a-plan-for-housing-in-wales-cih-cymru-launches-2026-election-manifesto/>

Crime Survey for England and Wales (2025). Crime in England and Wales: year ending June 2024. Available: <https://www.ons.gov.uk/peoplepopulationandcommunity/crimeandjustice/bulletins/crimeinenglandandwales/yearendingjune2024>

G15 Report (2025) Taking the Stigma Out of Social Housing – The residents' view. Accessed from: [G15-Research-Report_Taking-the-stigma-out-of-social-housing.pdf](#)

Inside Housing (2025). More than two-thirds of tenants feel stigmatised for living in social housing, national survey finds. Available: <https://www.insidehousing.co.uk/news/more-than-two-thirds-of-tenants-feel-stigmatised-for-living-in-social-housing-national-survey-finds-94696>

Ipsos. (2025). Half see immigration as an important issue facing Britain. Accessed from: <https://www.ipsos.com/en-uk/half-see-immigration-important-issue-facing-britain>

Joseph Rowntree Foundation (2024). UK Poverty 2024. Available: [UK Poverty 2024: The essential guide to understanding poverty in the UK | Joseph Rowntree Foundation](#)

Housing Today. (2025). Welsh social landlord hits back at false information about who it houses. Available: <https://www.housingtoday.co.uk/news/welsh-social-landlord-hits-back-at-false-information-about-who-it-houses/5137192.article>

Ministry of Housing, Communities & Local Government (2025). British Social Attitudes 2023: Public attitudes to housing. Available from: <https://www.gov.uk/government/publications/public-attitudes-to-housing-findings->

[from-the-british-social-attitudes-survey-2023/british-social-attitudes-2023-public-attitudes-to-housing](#)

Nation.Cymru. (2025). Polling shows immigration concern manufactured, say campaigners. Available from: <https://nation.cymru/news/polling-shows-immigration-concern-manufactured-say-campaigners>

Shelter Cymru (2025). 94,000 households in Wales – that’s one in every 14 – are stuck waiting for a social home. Available from: <https://sheltercymru.org.uk/build-new-social-homes/>

UK Collaborative Centre for Housing Evidence. (2025). *Addressing LGBTQ+ homelessness through inclusive services*. Available from: <https://housingevidence.ac.uk/addressing-lgbtq-homelessness-through-inclusive-services/>

Welsh Government. Homelessness and Social Housing Allocation (Wales) Bill: Integrated Impact Assessment. (2025). Available from <https://www.gov.wales/homelessness-and-social-housing-allocation-wales-bill-integrated-impact-assessment-html>

Welsh Government (2021). Disabled people’s outcomes in health, housing, education, and economic status. Available from: <https://www.gov.wales/disabled-peoples-outcomes-health-housing-education-and-economic-status-census-2021-html>

Welsh Government (2025). Written Statement: First Minister response to the removal of the two child limit. Available from: <https://www.gov.wales/written-statement-first-minister-response-removal-two-child-limit>

Appendix

a) Bi-Lingual advert campaign images and focus group adverts:

