



THE THIRD ALL WALES ANNUAL TENANT SURVEY

WHAT MATTERS RIGHT NOW

DECEMBER 2023
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TENANT VOICE SPONSOR

Foreword

Croeso and welcome to TPAS Cymru's **Third Annual All Wales Tenant Survey on Tenant Perceptions**. This annual survey and report are designed to examine tenant views of their homes, their communities and the issues that matter most to them. We believe, as the tenant engagement organisation for Wales, that this report provides decision makers with impactful insight into what really matters to tenants.

We received an amazing response rate from across Wales from a wide range of tenure, including tenants of Housing Associations, Local Authority Housing, Supported Housing and tenants in the private rental sector. This significant increase in private renter voice is important in demonstrating the challenges, similarities and differences in renter experience

This report provides clear evidence of what matters to tenants and has provided us with key data from the private sector as well as social, therefore enabling us to draw a comparison.

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

Finally, I would like to thank all tenants who took the time to respond to this survey and we welcome feedback on how we can improve this survey going forward. Our aim is for this to be an annual, survey-informed report to track tenant perceptions and subsequently, to help shape service improvement.



David Wilton,
Chief Executive, TPAS Cymru

Introduction to TPAS Cymru's 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 3 annual surveys.
 - Energy and Net Zero survey
 - Rent setting consultation
 - 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. Such as the recent Green Paper on Housing Adequacy and Fair Rents.
- 3) **Specific audience surveys:** we undertake specific targeted surveys, including 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 Rent setting. We believe by listening to tenants, and stakeholders, we can enable, open, honest, and transparent conversations.

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

Purpose and objective of this report

Our Annual Survey includes valuable tenant insight to enable us to identify common issues and challenges to specific tenure with Housing Association, Local Authority or private rental sector (PRS). We aim to provide everyone working in housing in Wales with information around how tenants view their homes, their communities and the issues that are truly important to them.

The findings and recommendations within this research offer valuable insight into the challenges tenants are experiencing; what tenants enjoy about their homes and communities and how, as landlords, you can make changes to ensure tenants are at the heart of your organisation by implementing their recommendations. We believe that listening to tenants, being open, honest, and transparent in policy and decision making, will lead to tenants living not only in homes and communities that they can survive in, but can truly thrive in too.

This is the third Annual Survey is the final Tenant Pulse surveys of 2023. It follows our National Energy & Net Zero survey published in August 2023, our Fair Rents and Adequate Housing survey in September 2023 and our Rent Setting Consultation Survey published in October 2023. We continue to champion tenant voice and are proud to have shared thousands of tenant voices.

Authors: David Wilton and Eleanor Speer

Date: December 2023

How the survey was promoted

The survey was sent to tenants who are signed up to our Tenant Pulse portal, inclusive of social and private sector renters.

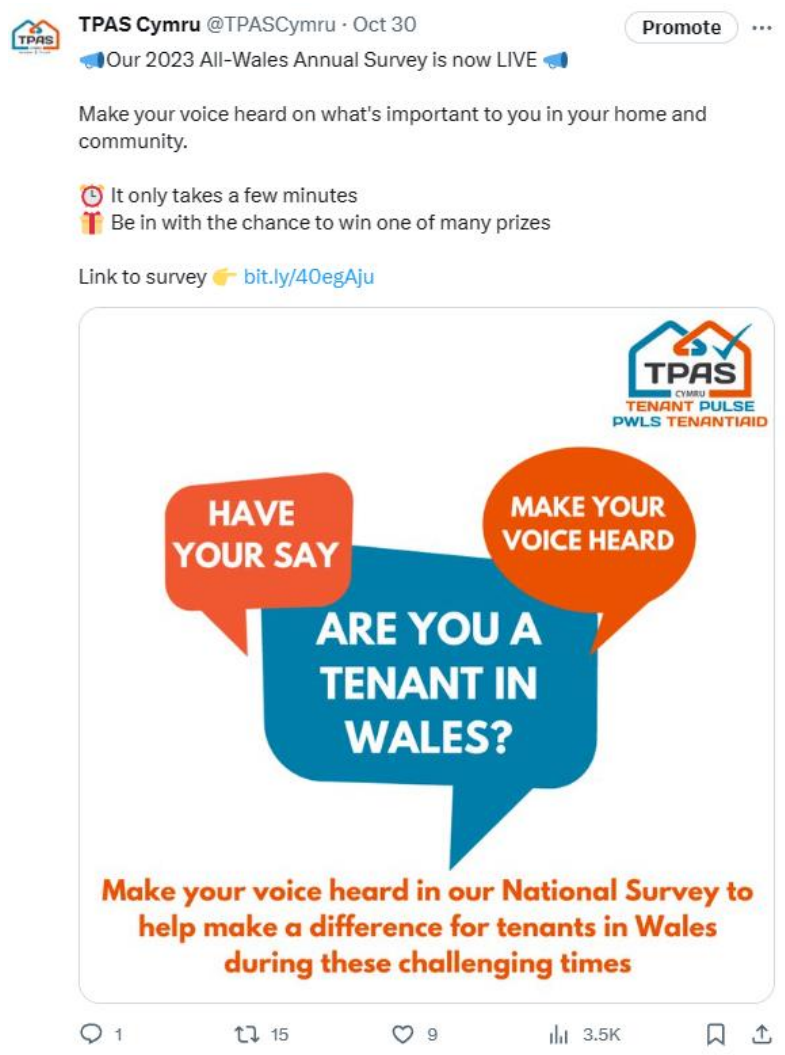
We saw some publicity support from social landlord and tenant groups to their tenants. This method creates some noticeable differences in tenant responses per landlord depending on the landlord's degree of engagement/promotion

Social media campaign

TPAS Cymru has a good track record in promoting our Tenant Pulse surveys through social media and our networks.



We launched a bilingual social media campaign to promote the Pulse survey across Twitter, Facebook, Instagram and Reddit channels. This has been our norm with promoting our Pulse surveys over the past 2 years. It has proved its efficacy with good results which have improved year on year. Reddit was a new platform and we found it highly successful in engaging private sector tenants.

Examples of our social media promotion:



The image shows a screenshot of a tweet from TPAS Cymru (@TPASCymru) dated October 30. The tweet text reads: "Our 2023 All-Wales Annual Survey is now LIVE". Below the text, it says "Make your voice heard on what's important to you in your home and community." There are two bullet points: "It only takes a few minutes" and "Be in with the chance to win one of many prizes". A link to the survey is provided: "Link to survey bit.ly/4OegAju". The main visual is a graphic with the TPAS logo (TPAS CYMRU TENANT PULSE PWLS TENANTIAID) and three speech bubbles. Two orange bubbles say "HAVE YOUR SAY" and "MAKE YOUR VOICE HEARD". A larger blue bubble in the center says "ARE YOU A TENANT IN WALES?". Below the graphic, it says "Make your voice heard in our National Survey to help make a difference for tenants in Wales during these challenging times". At the bottom of the tweet, there are engagement metrics: 1 reply, 15 retweets, 9 likes, and 3.5K views.



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 **Are you renting in Wales? If you could tell your landlord one thing, what would it be?**


AskWales

Hi all,

We're TPAS Cymru. We're a not-for-profit which has been working in Wales for the last 30 years, with the aim of ensuring tenants' voices are heard and included in every decision a landlord makes.

Each year we run our Annual Tenant Pulse survey, to explore and share tenants' views on what matters to them in their homes and communities alongside their experiences. Our report from this survey provides recommendations to the whole Housing sector and Welsh Government. We've seen real change happen from previous Pulse reports, including legislative change that protects renters in Wales.

This survey is for all tenants in Wales, no matter what kind of home you rent.

This really could be the most important 5 minutes you spend on your tenancy this month.

The survey only takes 5 minutes to complete, you can choose to remain anonymous and you can be in with the chance to enter our prize draw to win some delicious prizes.

The link to the survey is - <https://www.tpas.cymru/blog/the-3rd-all-wales-annual-tenant-survey>

On behalf of us all here at TPAS Cymru, thank you for trusting us with your voices.

 53 Comments  Share  Save  ...

Advertising

In line with previous TPAS Cymru practice regarding our Tenant Pulse surveys, we ran an advert through the Meta platforms to promote this survey to the wider public. As seen above, our advertising images were shared multiple social media platforms (Facebook, Instagram and Reddit)

As per last year, there are new political advertising guidelines on Meta platforms regarding social topics such as housing. Despite trouble last year obtaining permissions to post through Meta (as our last survey was flagged for political content) we were able to adapt this year and have our advert approved. This is worth noting as it does impact our response rates when compared to last year.

TPAS Cymru has learnt from our research that the paid advertisement tool, combined with our own targeting criteria which we have developed, is a key part of obtaining the views of tenants under 40. Specifically, this tool allows us to increase the awareness of the survey to tenants under 35, who are not engaged in traditional housing sector communications or engagement groups. Resulting from these efforts, this Tenant Pulse has a representation of 47% of respondents being under the age of 44.

It is also worth notice when regarding this survey, that the power of digital engagement has allowed us to gather information and real-life tenant case studies through the comments of our social media content.

Key Findings

About this survey

- This was our third annual All-Wales survey and has received a 45% increase in responses.
- We have had the widest demographic of tenant's responses to date, with significant increases in younger working renters, under the age of 44, living in the private rental sector (PRS).
- We have seen an increase in Black and Minority Ethnic respondents.
- Due to the high number of responses from the private rental sector, we have been able to draw comparisons across the whole of Wales's rental sector.

Findings

- Social housing renters feel much more secure in their tenure than private sector tenants.
- Social housing renters want to stay in social housing and are proud of it, whereas private tenants want to be able 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 in this area.
- Social housing renters want to know why their landlords are focussing 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 issues surrounding parking is a key priority for social housing tenants, whereas PRS tenants have little expectation from their landlord to tackle such things.
- Black & 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

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

Response summary

Data integrity

The data was reviewed for anomalies, with no significant issues identified. We only correct typos to assist readability.

Nationally, members of Tenant Pulse were invited to respond to multiple choice and comment-based questions on their current rental thoughts, experiences, and opinions. Respondents were invited to provide additional comments on questions asked.

Response summary

A total of **1,048** tenants from across every Local Authority in Wales responded to the survey. **This is our largest Tenant Pulse response rate to date.** Therefore, we are confident that the wide representation of geographical submissions in our responses, provide valuable insight into the perceptions and attitudes of tenants in Wales.

Question 1: Which Welsh Local Authority area do you live in? (If you live outside of Wales, please tick 'other')

Note: We consistently have higher responses in big urban areas compared to smaller or more rural counties.

Highest Responding areas overall (highest first)	Lowest Responding areas overall (lowest first)
Cardiff	Torfaen
Vale of Glamorgan	Denbighshire
Swansea	Monmouthshire
Rhondda Cynon Taff	Merthyr Tydfil

Highest Responding areas by social housing (highest first)	Lowest Responding areas by social housing (lowest first)
Vale of Glamorgan	Torfaen
Rhondda Cynon Taff	Wrexham
Newport	Monmouthshire
Cardiff	Denbighshire

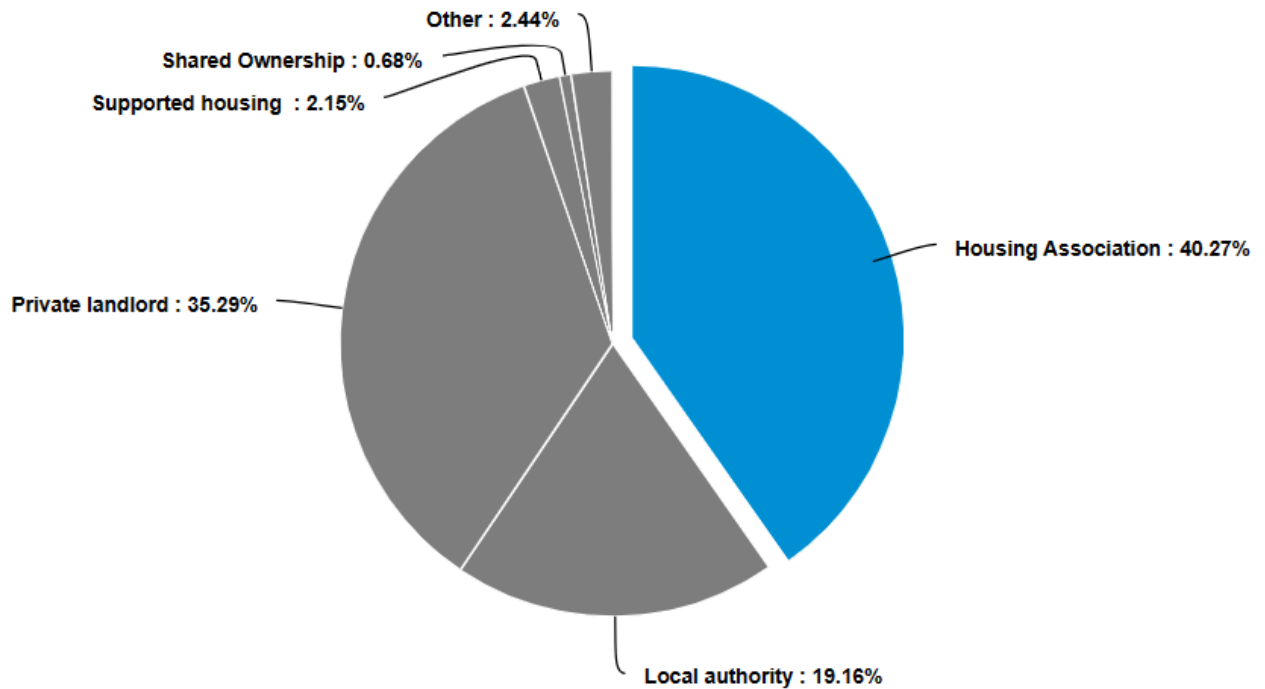
Highest Responding areas in the private rental sector (highest first)	Lowest Responding areas in the private rental sector (lowest first)
Cardiff	Denbighshire
Swansea	Merthyr Tydfil
Rhondda Cynon Taff	Ynys Mon
Vale of Glamorgan	Torfaen

We saw a reduction in Gwynedd and Conwy, but improvements in Neath /Port Talbot who had previously been a low responder.

Throughout 2024, TPAS Cymru aims to collaborate with landlords in the areas listed as the lowest responding areas to improve responses. Achieving this aim will ensure that tenant voices are represented fully in our Pulse survey and tenants feel like their voices are heard, regardless of the area they live; this is the ethos of Tenant Pulse and this Annual survey.

Respondent Demographics

Question 2: What type of tenant are you?



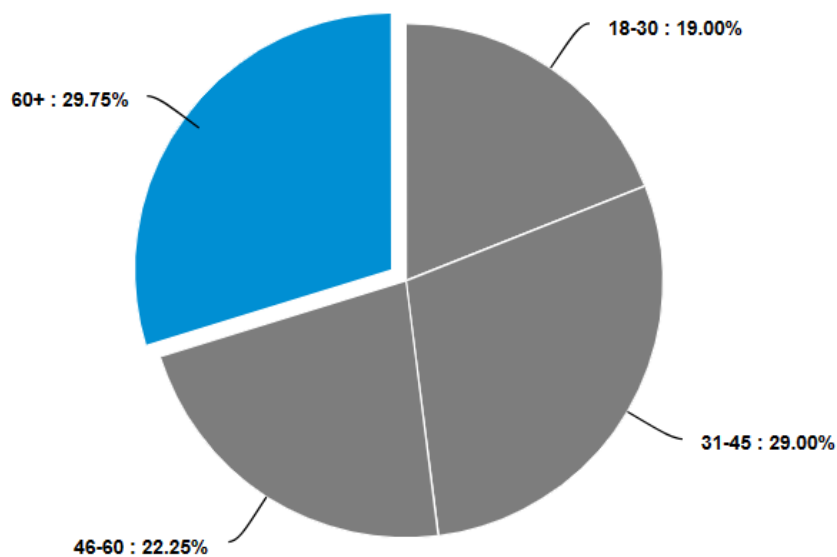
Out of the **1,048** respondents:

- 40% lived in a Housing Association property.
- 19% lived in a Local Authority property.
- 35% lived in a property owned by a private landlord.
- 2% lived in supported housing.
- 1% lived in a shared ownership property.
- The remaining 2% lived in a property they describe as 'other'.

Note: When compared with our 2022 Annual Survey data, the 2023 findings demonstrate a **more even split between social housing and the private rental sector**. This enables this report to express the voices of tenants across different tenures more evenly and provide an overall look at the circumstances of renting in Wales, drawing on comparisons from a tenant perspective.

Question 4: What age group are you part of?

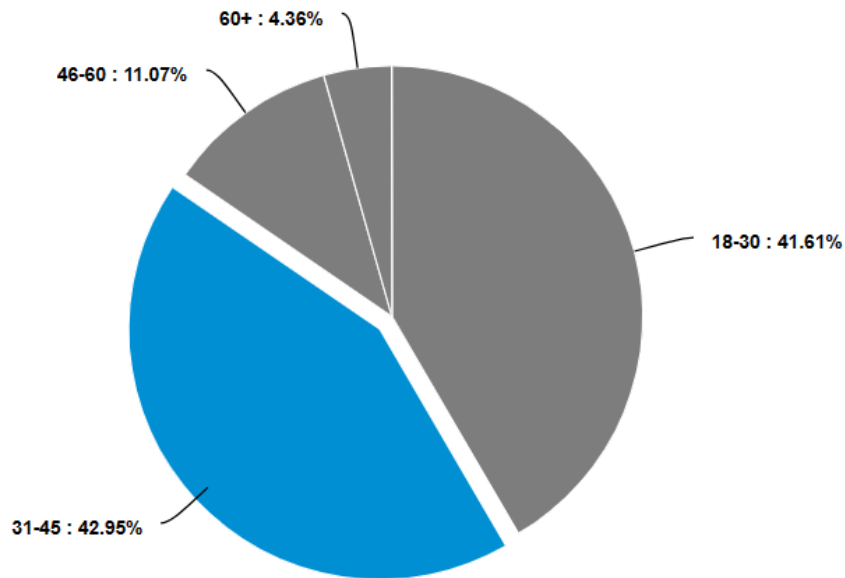
The age breakdown of respondents overall was:



Key observations:

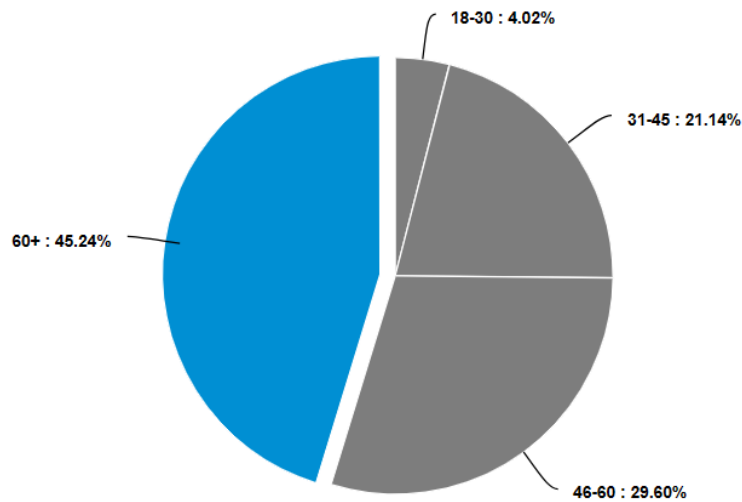
- We are delighted with this breakdown as it showed significant contribution from younger tenants aged 44 and under, predominantly representation of younger private renters.
- The age breakdown of private renters was much younger than last year and provides valuable insight into private renters in Wales.
- However social housing has an older spread with a more notable retired community living in social housing.
- Responses from tenants whose main income came from salary or paid work also provided a much younger demographic.

The age breakdown of respondents in Private Housing:



Note: this is a major improvement on last year in reaching younger renters. ie age group under 30 was 42% this time compared to 19% last year. The age 31-45 was 43% compared to 34% last time.

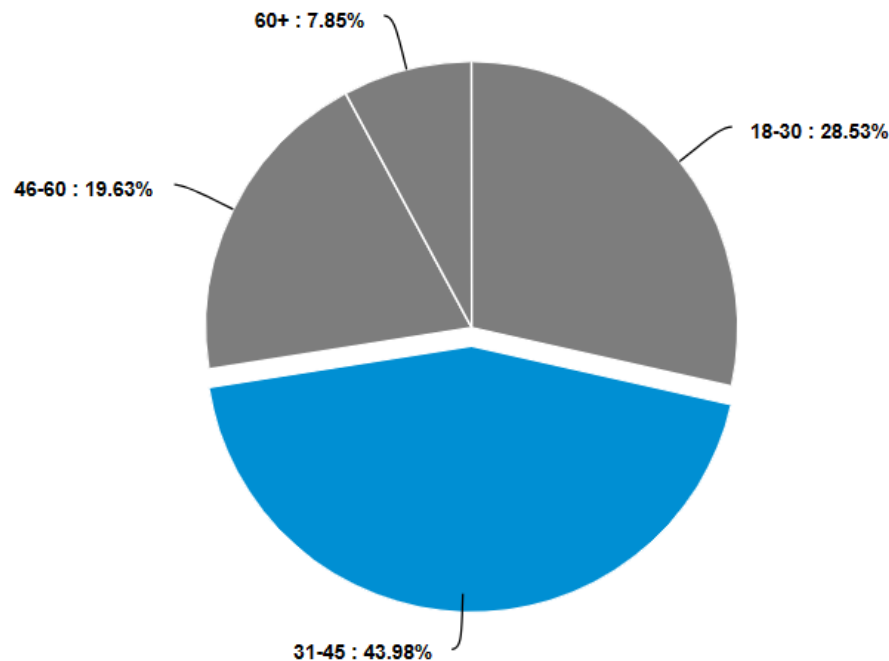
The age breakdown of respondents in Social Housing:



Note: Whilst social housing has an older demographic compared to private renters, we still saw improvements.

Of note: Working tenants (tenants whose main income comes from salaried or paid work)

Pleased to see good volume and age spread of working tenants.



There are three things to note when looking at this data in terms of response demographics:

- 1) When comparing the data to the 2022 Annual Survey report, the 2023 report provides a more balanced view of tenants across all age groups, when looking at the overall figures (of tenants across all tenures).
- 2) The percentage of responses from tenants under the age of 45, continues to differ by tenure significantly. In this report, the difference is more than double what we saw in our 2022 Annual survey, with 85% of private housing tenants under the age of 45, compared to 25% of respondents in social housing. Again, we see this pattern reversed in the over 65-year-old age bracket – with a rise of nearly 40% for tenants in social housing compared to private renters.
- 3) TPAS Cymru continues to aim for Pulse reports to present a balanced and representative voice for tenants in Wales. We will continue to improve our Tenant Pulse platform to ensure this reflection is achieved. When looking at our previous Annual Surveys (2021 and 2022), this diversity in responses has continually developed to become more equal and strongly represents the tenant voice in Wales.

Question 5: Do you consider yourself or anybody in your household, to belong to any of the following underrepresented groups?

Black Asian Minority Ethnic (BAME)

4.6% of tenants who responded overall identified as having a Black Asian Minority Ethnic (BAME) background. Whilst improving, we have further work to do as the current Wales-wide population (as of 2023) is 5% (StatsWales, 2023). We are continuing to work with partnership organisations across Wales to ensure our Tenant Pulse is accessible to all communities in Wales.

2.6% of tenants in social housing identified as having a Black Asian Minority Ethnic (BAME) background. This is a 30% improvement (from 2% to 2.6%) compared to our 2022 annual survey. In addition, as the overall survey grows, so does the overall total BAME responses, meaning the data becomes more significant.

6.8% of tenants in private rental housing identified as having a Black Asian Minority Ethnic (BAME) background. This is an 70% uplift improvement on last year (going from 4% to 6.8%) compared to 2022 annual survey and again, because we had a much bigger PRS responses so were the overall actual numbers allowing us to have more confidence in the responses.

New to this survey

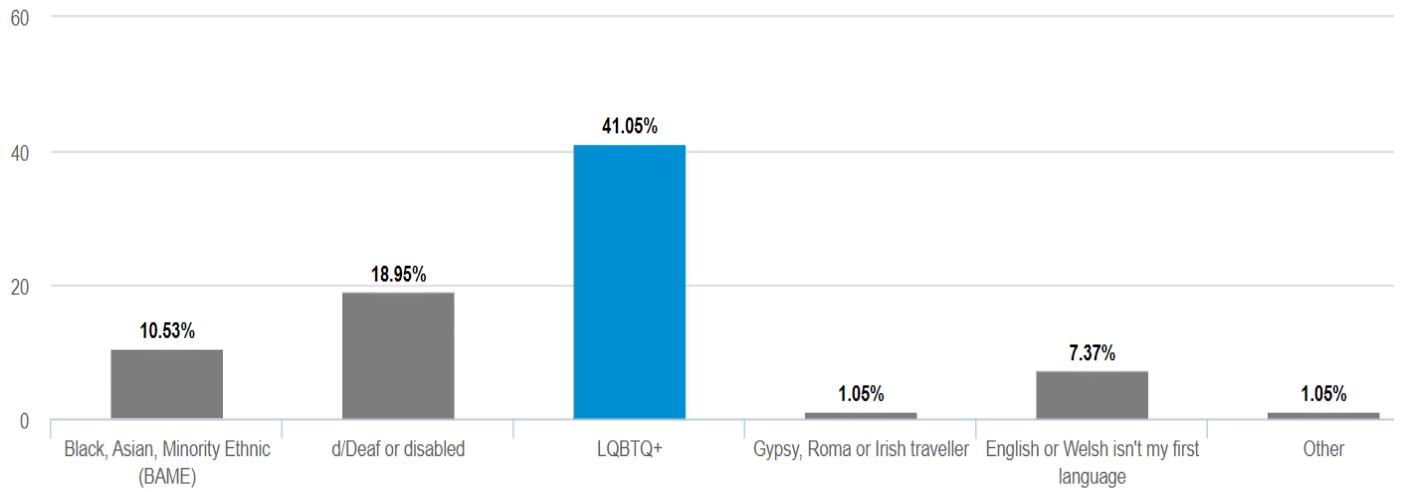
New to our 2023 annual survey, we wanted to provide tenants with the opportunity to identify with more under-represented groups, to get a wider picture of the tenant voice.

Group	Overall %	Social Housing	Private Rental Sector
d/Deaf / Disabled	31%	37%	19%
Black & Minority Ethnic	4.6%	2.6%	6.8%
LGBTQ+	17%	9%	31%
Carer	10%	13%	5%
Gypsy, Roma or Irish Traveller	0.2%	0.2%	0.35%
English or Welsh isn't my first language	10%	10.5%	9.5%

When asked the above question, 3% of all responding tenants identified as belonging in the 'other' category. When commenting to explain, tenants identified groups including Mental Health, Neurodiversity, invisible disability and for social housing tenants, numerous said 'Welsh' or 'Welsh Speaking'.

When we applied different filters we can see significant variations:

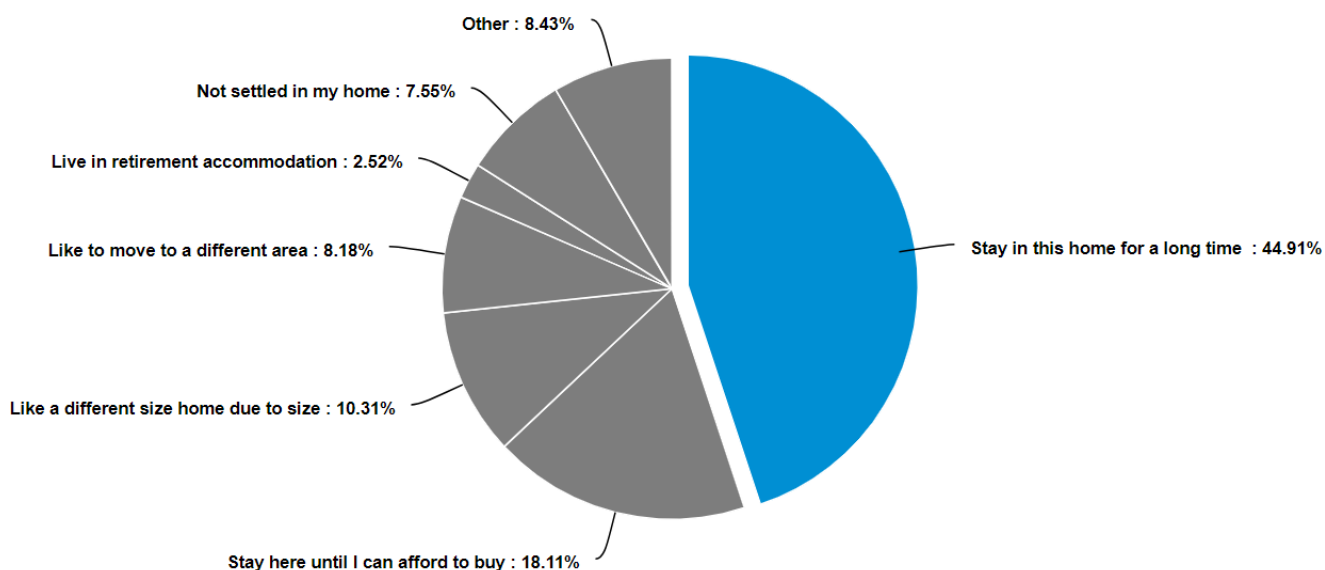
Example: Under 30s, working, private renter: high LGBTQ+ response rate, good Black & Minority ethnic, but lower than the overall tenant population for disability.



Note: We are unable to filter and report on all variables in this report, but if you have any data requests for certain segmentation, please get in touch.

Question 6: How would you describe your current renting situation?

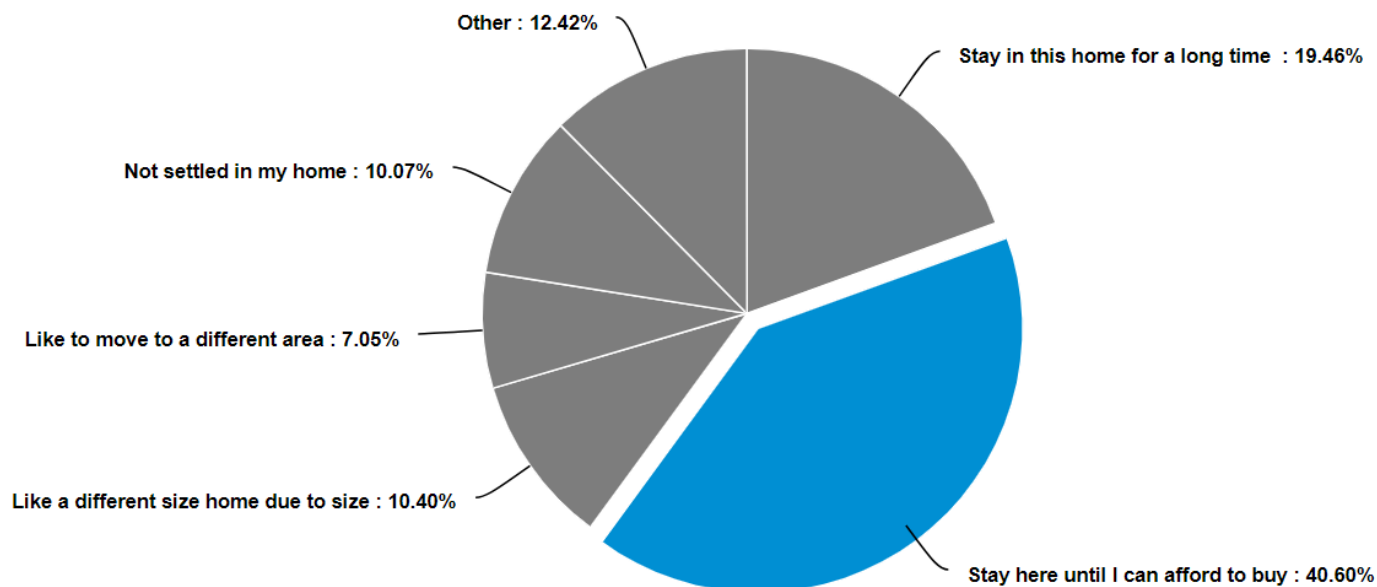
All responses



Almost half (45%) of respondents intend to stay in their home for a long time with almost a third were waiting until they can afford to buy.

The views of the private rental sector and social housing differed significantly. With social housing tenants viewing their rental situation as long term, whereas tenants renting privately were aiming to buy a property when they could afford it.

When we look at just Private Renters:



Private Renters comments:

'Just renting until I can afford to buy' was highest for those within the under 30s category, with 49%. This decreases as private renters get older.

The highest aspiration to buy was [Under 30s, working, private renter], with 55%

Within this section, we enabled tenants to comment further about their current rental situation. For private tenants, three themes became apparent.

- 1) Conditions and the lack of affordability
- 2) Lack of safety, security, and comfort
- 3) The struggle related to saving money to enable a moving home.

Conditions/lack of affordability:

- *Our flats energy method (electric storage tank) is expensive and old. Last winter we were paying so much money for the heating and barely using it. Our shower leaks and isn't consistently warm. Appliances are old.*
- *Storage heaters - too expensive to run and don't heat the house properly....*
- *"Unfortunately, recent legislation changes etc have meant our rent has had to go up to cover checks and changes, so we now may not be able to afford to do this. We are very frightened that we will lose our home and be unable to afford to live in Cardiff anymore".*

Renting in the UK is ridiculously overpriced and insecure. I don't chase my landlord for repairs that are, in my home country would not even be an issue, because I fear if I'm too demanding they'll increase my rent or evict me.

I put up with living in a dark, damp, badly insulated tiny house that makes me depressed because if I had to move now, I wouldn't be able to afford saving for a deposit

Lack of safety, security, and comfort:

- *I don't feel secure in my tenancy and worry about being homeless again. My landlord hasn't given me a new tenancy (as per the new law)*
- *Overcrowding. Have advice from doctor to move to bigger house due to children's mental health and disabilities. Still on the waiting list.*
- *Drug sale and use, aggressive and threatening neighbours, poor community, rubbish everywhere, anti-social behaviour, cars driving at excessive speeds at all hours of the day, motor bikes doing wheelies, theft, multiple. Damage to properties in this area from teenagers, previously birds in the loft but now mice in the loft, very damp house with repairs taking too long.*

My house is so small and damp that my clothes and furniture are mouldy and ruined. I don't know if I can leave my contract but I'm sleeping on the sofa right now.

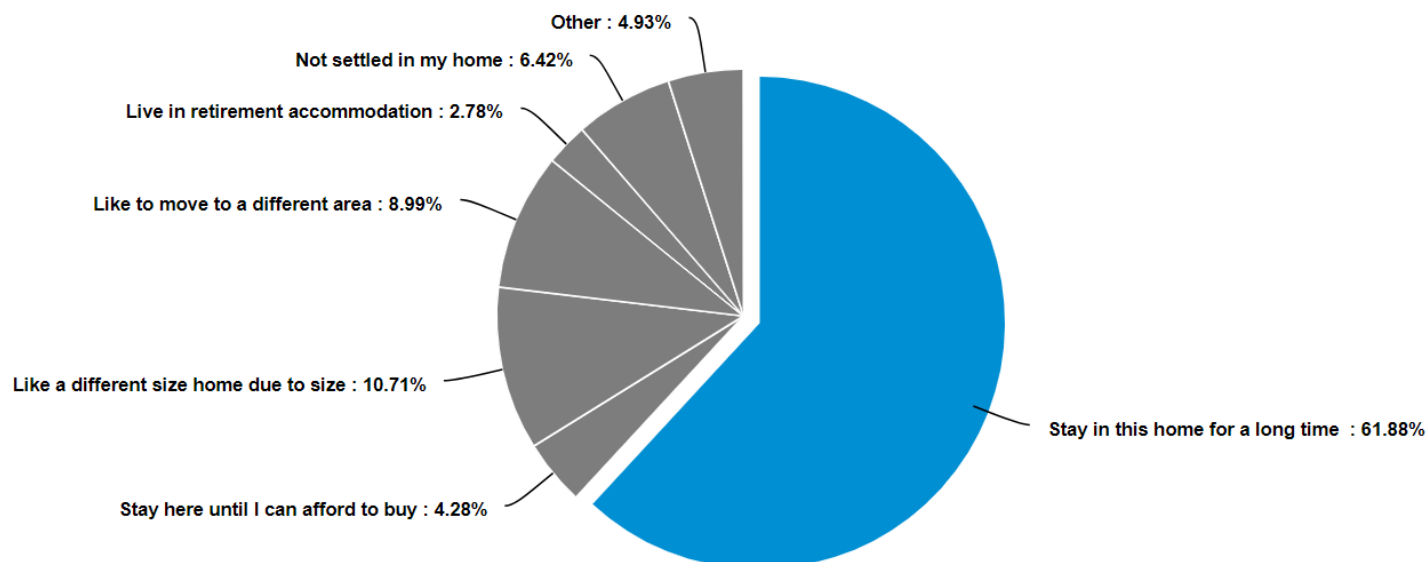
Struggles related to saving money to enable moving home:

- *Trying to save, but prices rise faster than salaries*
- *I save over £400 a month and have saved nearly £10k but still don't feel close to buying. I feel like house prices have risen so much over the last few years that despite saving hundreds of pounds a month and scrimping to do this that I'll never keep up with price inflation.*
- *We have been saving to buy for several years but it feels like the goalposts always move and it's becoming harder for people in their 20s and early 30s to get on the property*

ladder. The major rise in interest rates has made us delay our plans to buy. We have had to significantly alter our plans and it's soul destroying because we have spent 13 years renting and desperately want our own home.

- *With rent taking around 60% of my income, after tax, we're struggling to get money together to save - and this is on two salaries!!*

When we look at Social Housing Renters:



As can be seen, social housing renters would prefer to stay in their home for a long period of time (62% up from 58% last year), rather than buying their own property, like private renters. This could be due to several factors, including the security of tenure that comes with social housing, the way that allocations take place is likely to mean that renters who get the opportunity to live in social housing are likely to have universal credit as their main source of income, which means a higher percentage of their rent will be paid, whereas private renters in receipt of universal credit will receive a lower rate and will therefore need to cover a higher percentage with their own income. Some private renters highlighted that this felt like 'dead money' or a 'lack of investment'.

Despite a high number of social housing renters wanting to stay in their home for a long time, there were comments highlighted by both local authority housing tenants and housing association tenants.

We have separated these comments to enable better understanding for landlords reading this report.

[Housing Association comments](#)

Anti-social behaviour

- *I have been suffering antisocial behaviour since moving in 4 years ago despite it been reported and landlord being present during one incident; nothing has been done.*
- *The property has never been suitable for my fluctuating health needs and noise nuisance and other harassment is having a further detrimental effect on my mental and physical health.*

Would like a new home

- *Size of 3rd bedroom is embarrassing, can just about fit a bed in there. We've had to cut and adapt a single beds length just to fit storage in. Our neighbours are also horrendous which has made us now want to leave the site.*
- *I have lots of steps to go up to my garden. Need to catch taxi or bus to get home from my local town. Cannot walk back up the hill to go home.*
- *the small bedroom only has enough floor space under the government guidelines for a child under the age of 10 which means when my youngest turns 10 next August we'll technically be over occupying the property.*

Local Authority comments

Housing conditions and repairs

- *I have had a leaking roof for a year and the Council has not fixed it.*
- *Nothing been repaired by council and the flat needs updating. It's old damp.*
- *House is poorly insulated and expensive to heat, poor sound insulation in adjoining wall with neighbour, house is not kept well maintained by council, external parts of house and the street neglected & poorly maintained, unhappy with council due to their dismissive and callous attitude, rent is high given that it is social housing.*

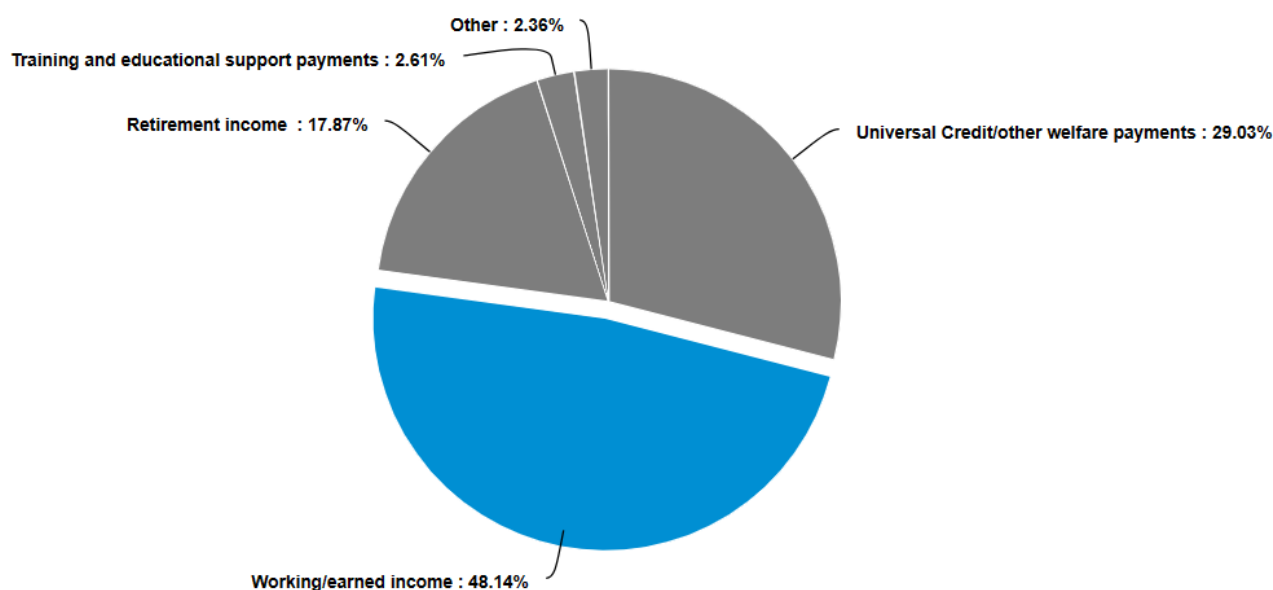
Unhappy with the area of their homes

- *Due to the rural location of my current home and lack of provision of locally services I am isolated from LGBTQ community support. I must travel 14 miles to access mental health services. I have experienced anti-social behaviour and harassment from a neighbour which my local authority has minimised and failed to support me with.*
- *I have a difficult neighbour who terrifies me. The council took the little garden away. Another neighbour is good at leaving their children's litter for someone else to pick up. School holidays are a nightmare.*

Question 7: What would you say is your MAIN source of household income?

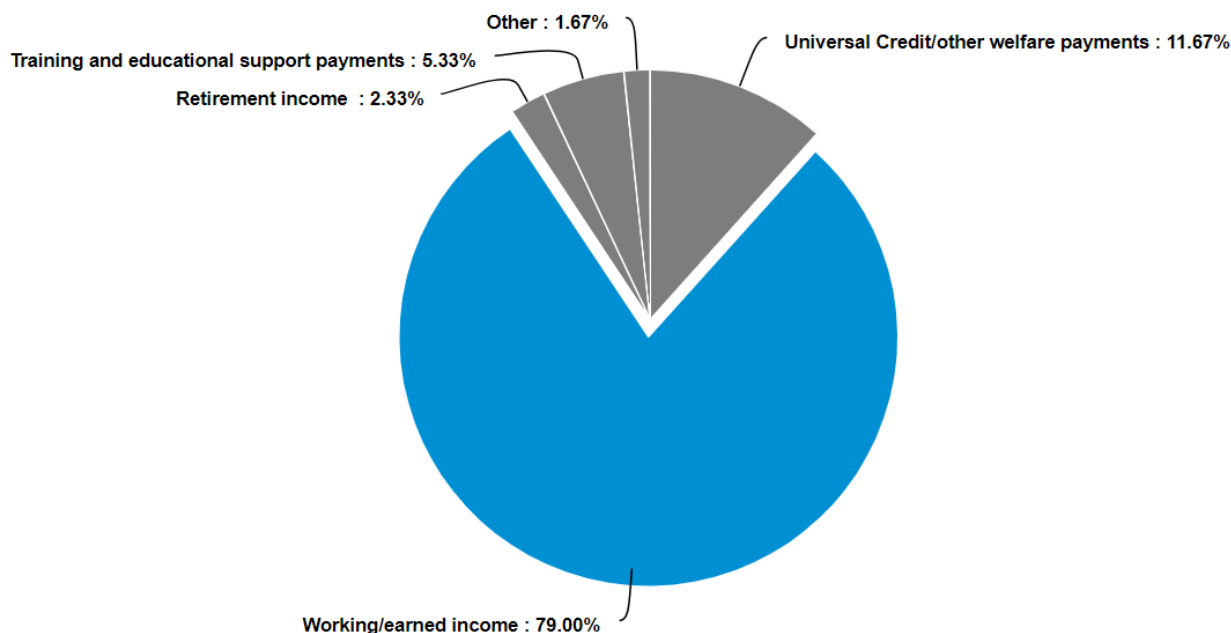
Respondents were only able to choose **one** of the options.

All Responders



There were significant differences between private housing renters and social housing renters.

Private Renters



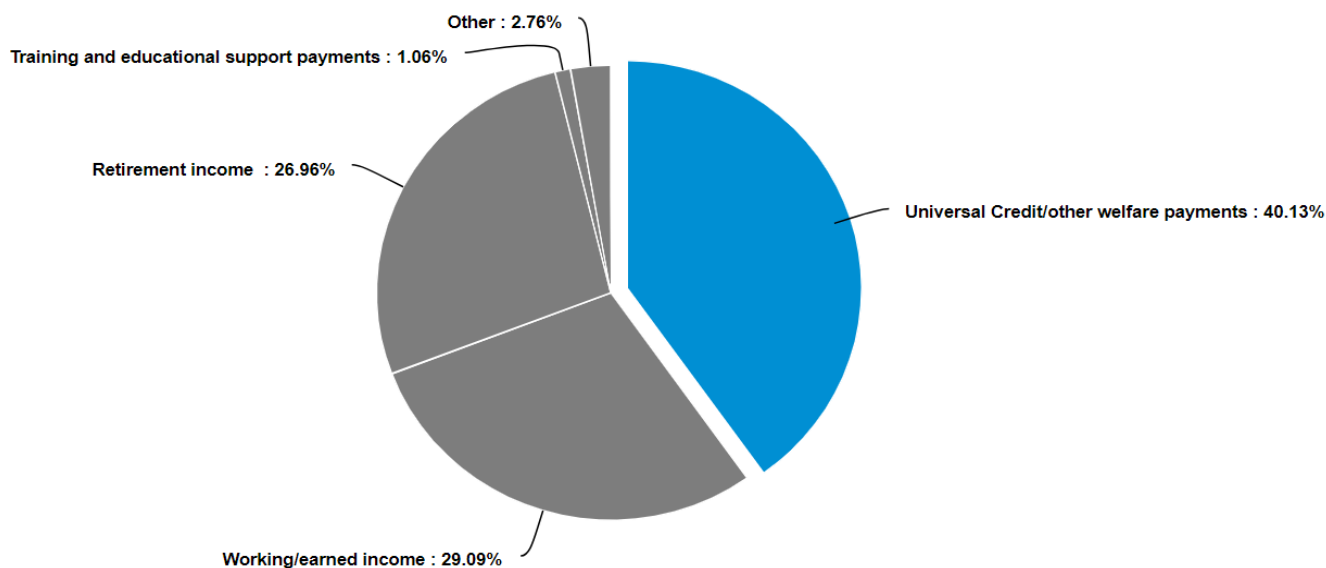
As can be seen, the highest proportion of renters who rely on earned income as their main source are in the private rental sector, with a small proportion relying on retirement income. At 79% this is an increase compared our 2022 research, where 67% of tenants who rented privately were dependant on their earned income. The overall increase may be because of the overall number of

respondents. Similarly, there was a significant decrease in the number of respondents who said that Universal Credit was their main source of income (2022- 22% and 2023 – 12%).

The 1.67% who selected 'other' suggested that they had a mixture of income, including part-time working, benefit top ups, voluntary work etc. This suggests that we may need to consider expanding our selections within our next tenant pulse.

Social Housing Renters

Unlike private renters, social housing renters' main source of income came from Universal Credit, it should however be noted that 29% of social housing renters relied on earned income as their main source of income.



Tenants with protected characteristics

We identified significant differences between different groups:

Tenant identifying as **Black & minority Ethnic** were as follows:

- 68% working
- 14% student
- 14% UC/Benefits

Tenants identifying as having a **disability** were as follows:

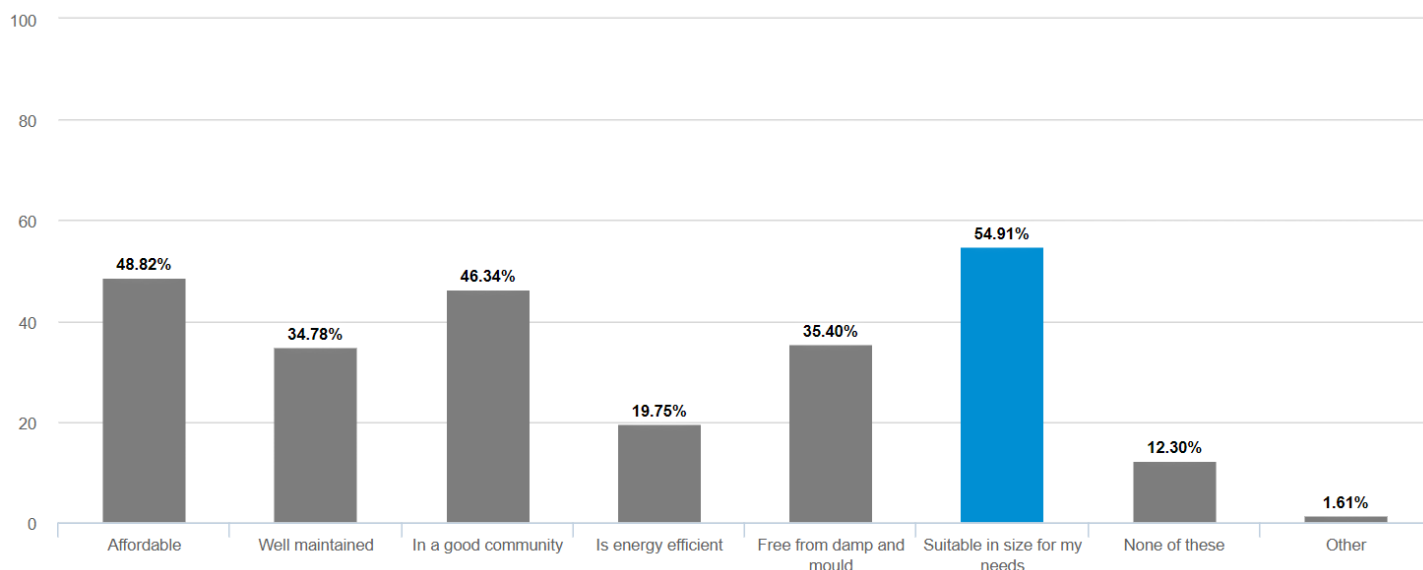
- 24% working
- 2% student
- 53% UC/Benefits

There are two key points we would like to note:

- 1) This breakdown is in line with previous Pulses where the majority were in receipt of Universal Credit or Retirement income.
- 2) When we looked at tenants with protected characteristics within both sectors, we saw a decrease on working income and an increase in Universal Credit

Question 8: Would you say your home is any of the following?

Tenants could pick **more than one** answer.



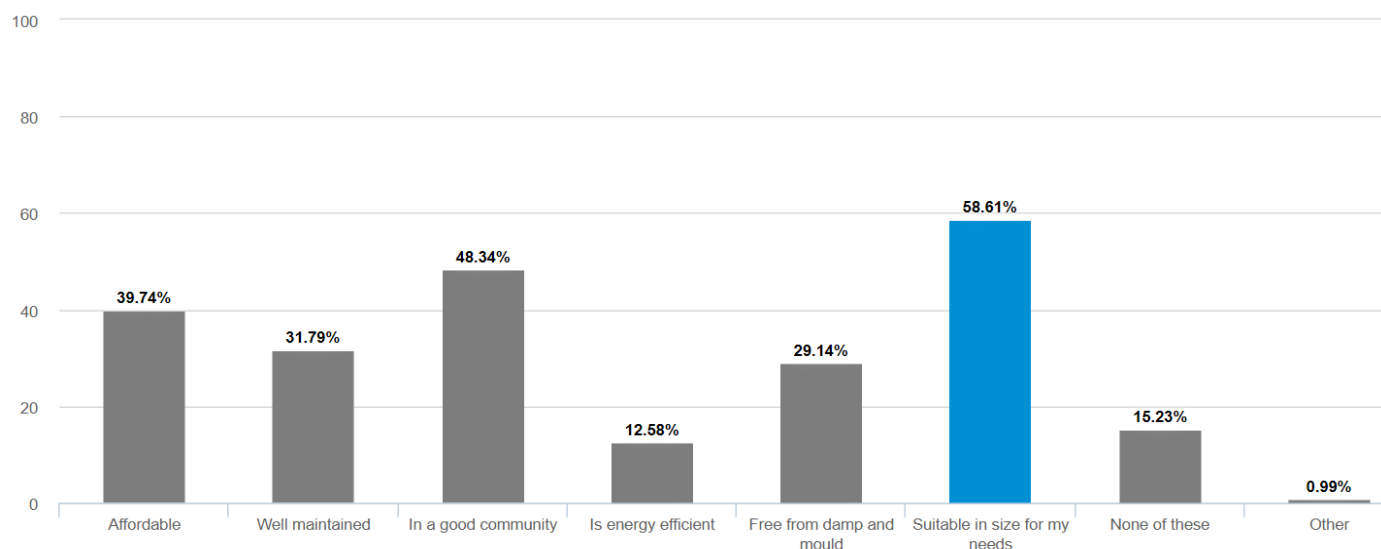
Key findings:

- Less than half of respondents said their property was affordable. This is a decrease since last year.
- Only a third felt that their home was well maintained, and free from damp & mould.
- Less than 20% felt their home was energy efficient.
- When filtered for tenants identifying as Disabled, or Black or Minority Ethnic there was a noticeable positive increase in acceptance of housing conditions and affordability. A notable negative difference was less satisfaction with 'Suitable in size for my needs'.
- The least satisfied with affordability were renters under the age of 30 (35%) and even more so private renters under the age of 30 (29%)

How does that compare to last year?

1. Last year 60% said their homes was affordable compared to 49% this year.
2. 'Is well maintained' fell from 41% to 35% and the same for 'free from damp & mould' (40% last year down to 35%).
3. Other answers, like size, good community stayed the same (within 1%)

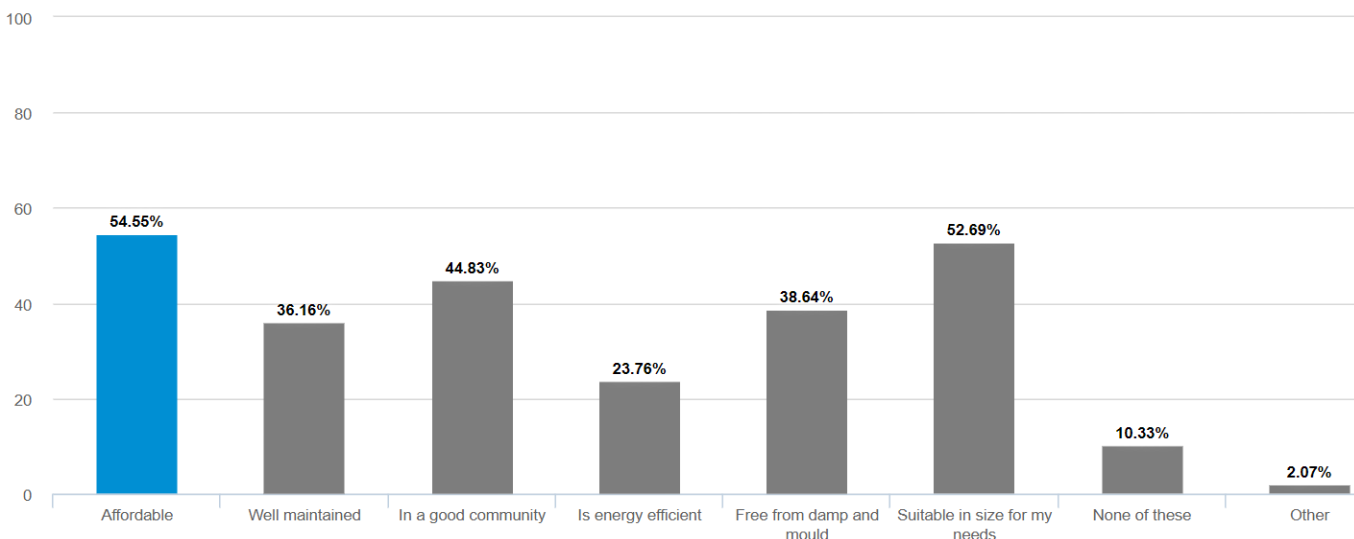
Private renters: *Would you say your home is any of the following?*



Comparison between private renters and other renters

- Private renters are less likely to find their homes affordable. 40% compared to 48% for All Tenants
- 'Is Energy Efficient' at a very low 12% compared to 29% for All Tenants.
- 'Free from Damp & Mould' falls to 29% compared to 35% for All Tenants
- The younger the private renter, the more they don't agree that their home is affordable. 29% for under 30s.

Social housing renters: *Would you say your home is any of the following?*

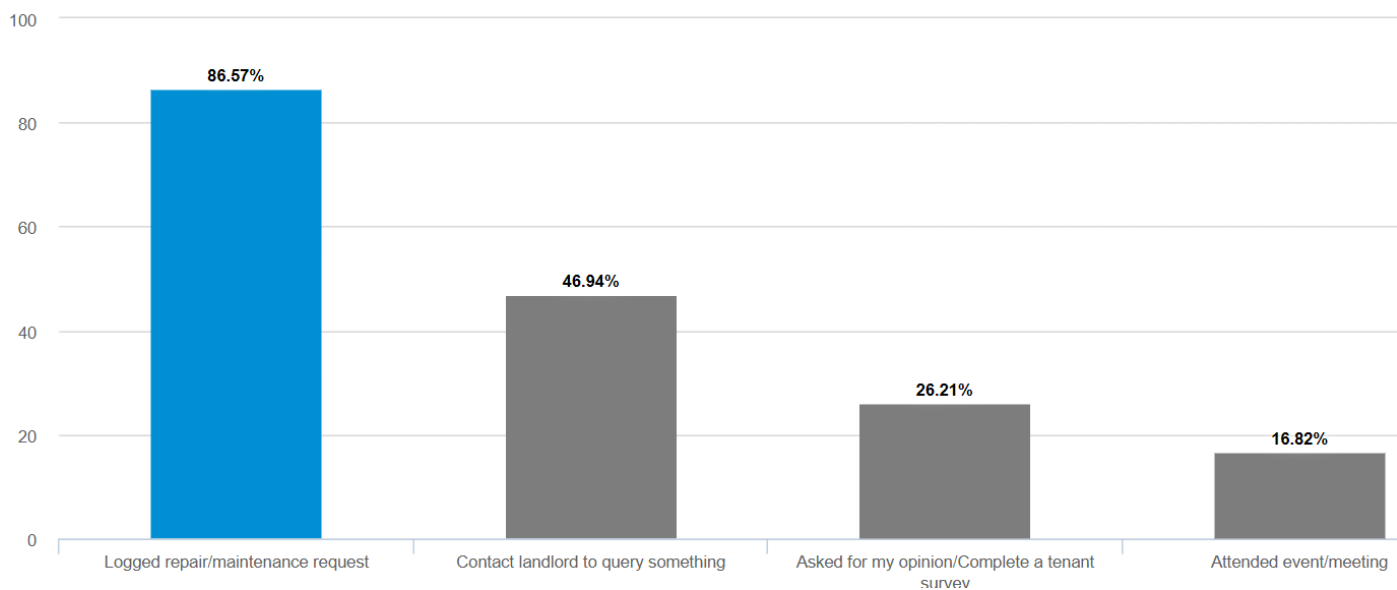


Social housing tenants were more positive than private renters.

- 56% have said that their home was affordable compared to 39% in the PRS.
- 24% have said that their home was energy efficient compared to 12% for the PRS, however neither are significantly high and where we would like them to be.
- There has been some improvement with damp & mould, with 39% emphasising that they are free from Damp & Mould compared to 29% of PRS tenants. Again, that still leaves a lot with alleged damp & mould.

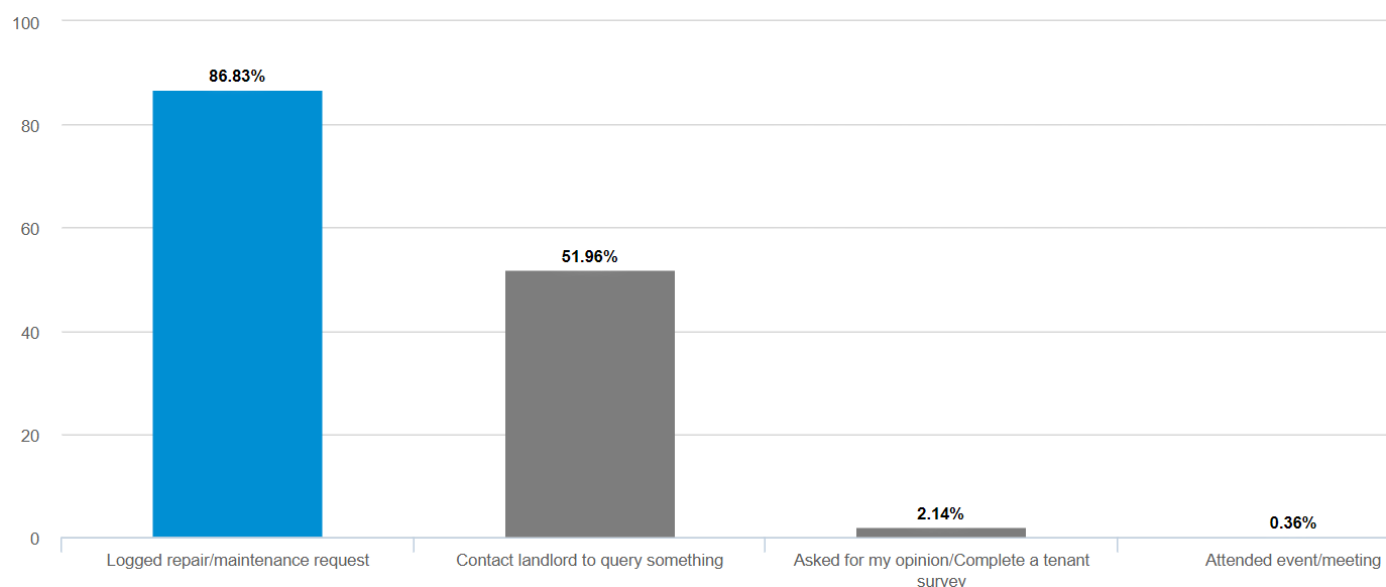
Question 9: In the last year, what interactions have you had with your landlord?

All renters



Note: There are no significant differences between private and social housing within this section, meaning that the above findings are not worth further comment as a combined tenure.

Private renters

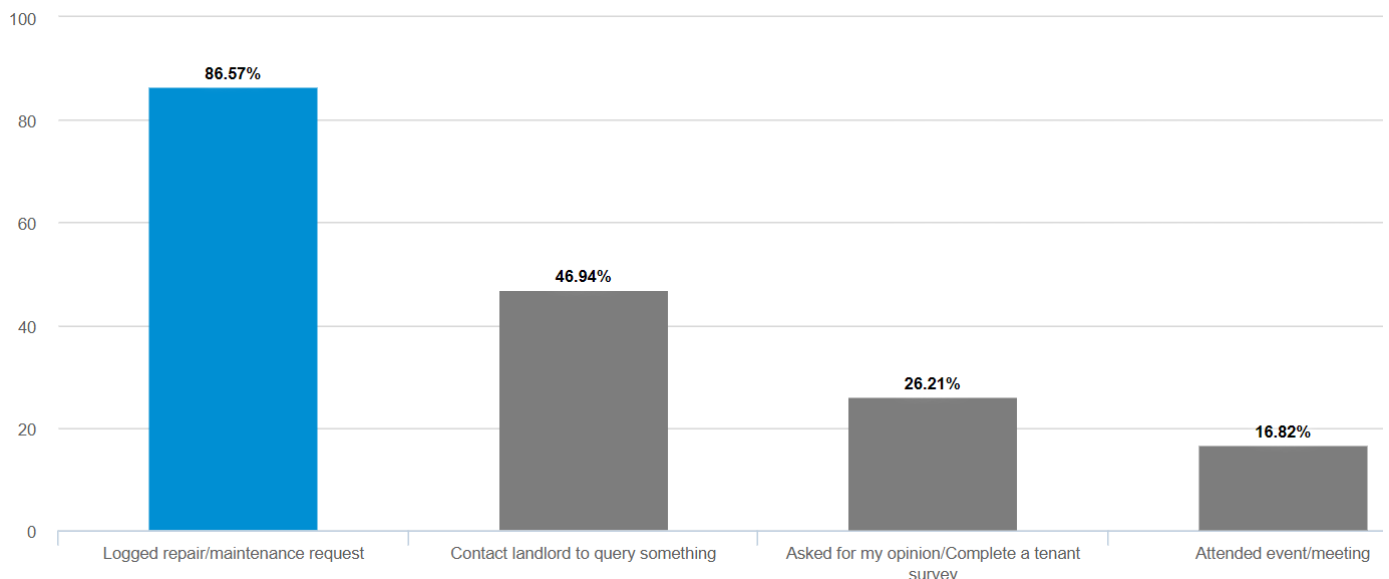


Key finding: In line with 2022, private renters have a much more transactional relationship with their landlord/agent. It is only to log repairs, query issues.

More private renters had logged a repair this year 87% compared to 71% last year, however fewer had been asked their opinion or completed a landlord survey 2% compared to 4% last year.

Renters are rarely asked their opinion or able to give feedback.

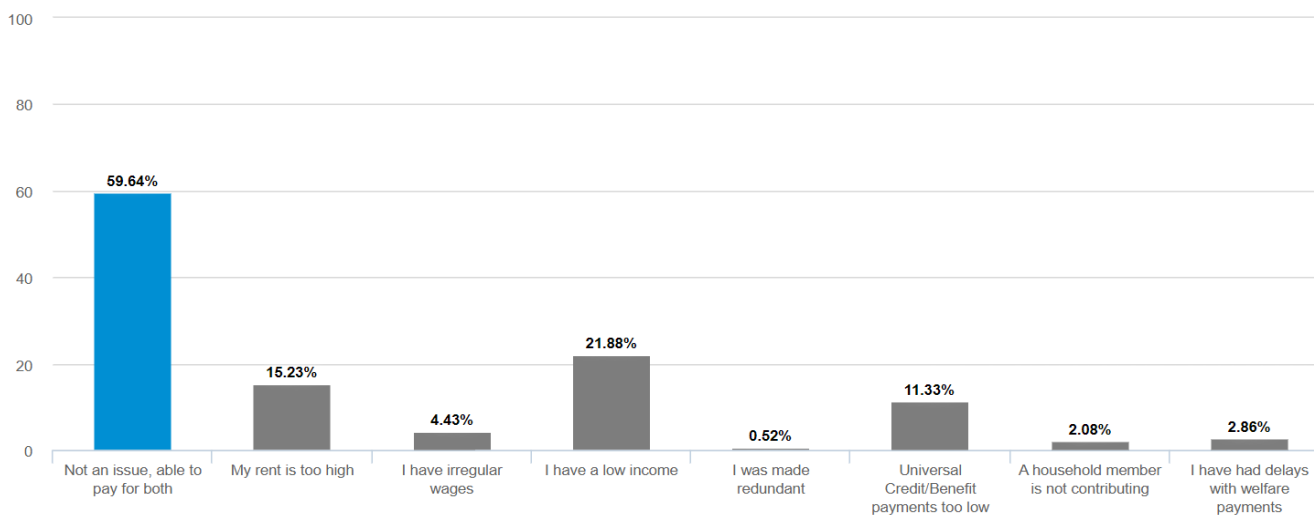
Social housing renters



- We have seen much higher % of social housing renters who attended a meeting or asked for their opinion compared to private renters.
- Those who have needed to log a repair has gone up from 79% to 87%
- When we filtered for renters with protected characteristics in social housing, we were pleased to see a similar % breakdown of this question.

Question 10: If you are struggling to pay the rent/bills, what is causing this?

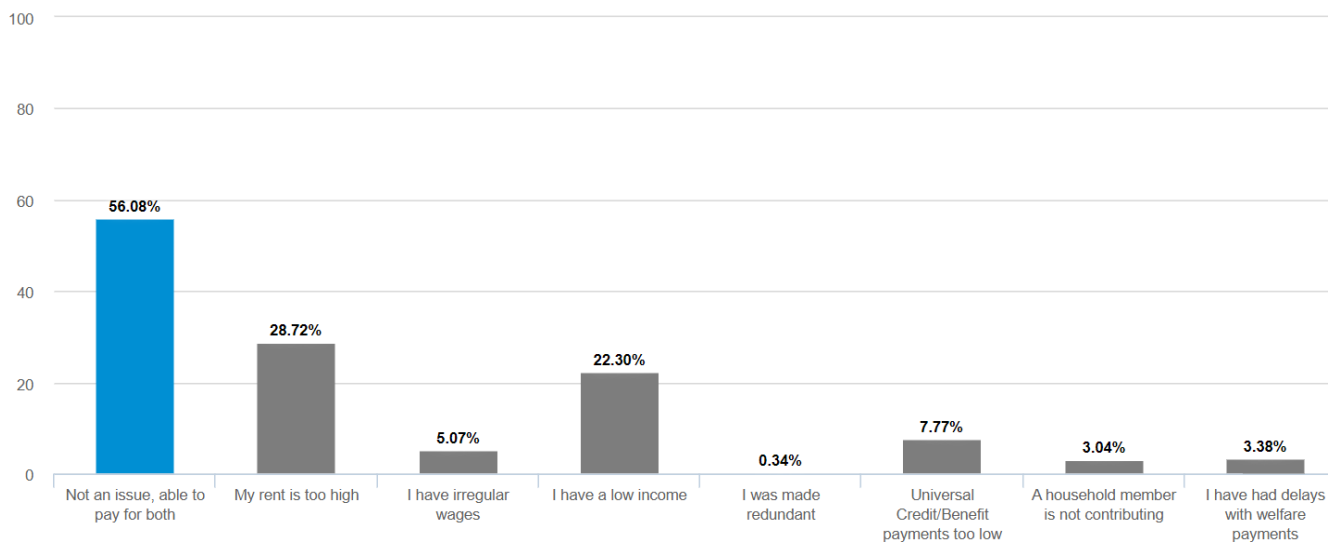
All Renters



Key Findings:

- This was one of the most closely aligned questions for private and social housing tenants, similar challenges for those struggling to pay the bills. Low income from benefits, redundancy, and delays in payments impact all tenues.
- The only major difference noticed was private renters thought their rent was too high in much bigger numbers 29% compared to 7% social housing tenants.

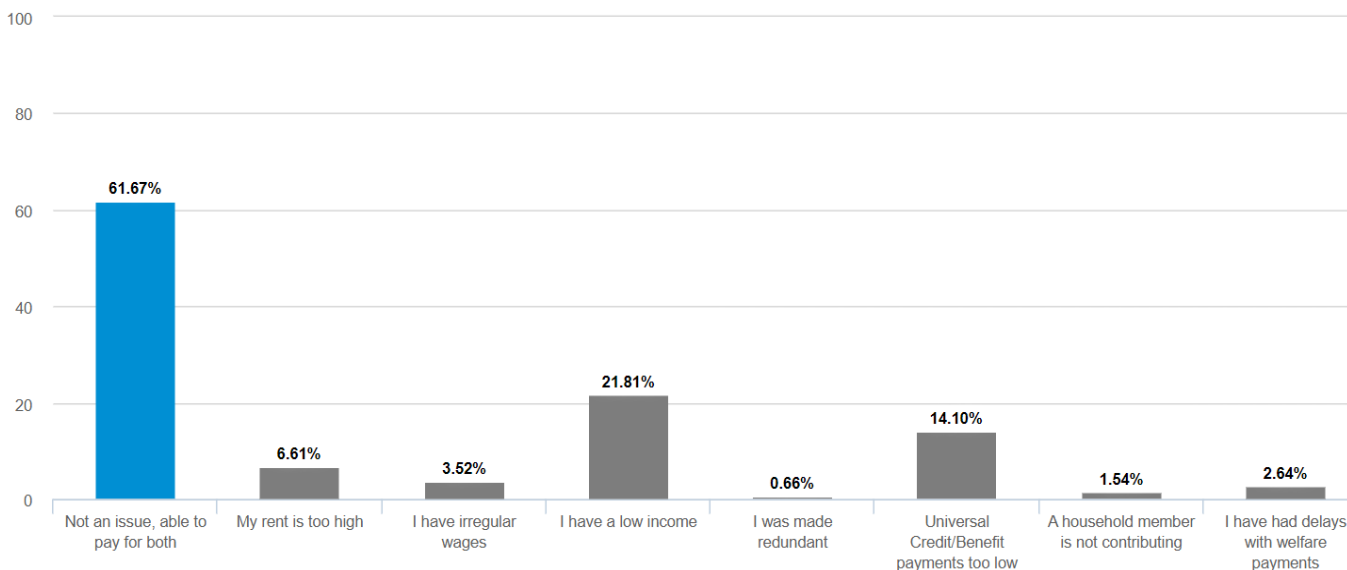
Private Renters *If you are struggling to pay rent/bills, what is causing this?*



Compared with last year:

There were many similarities except for 'My rent is too high' has increased from 17% to 29%.

Social Housing tenants *If you are struggling to pay rent/bills, what is causing this?*

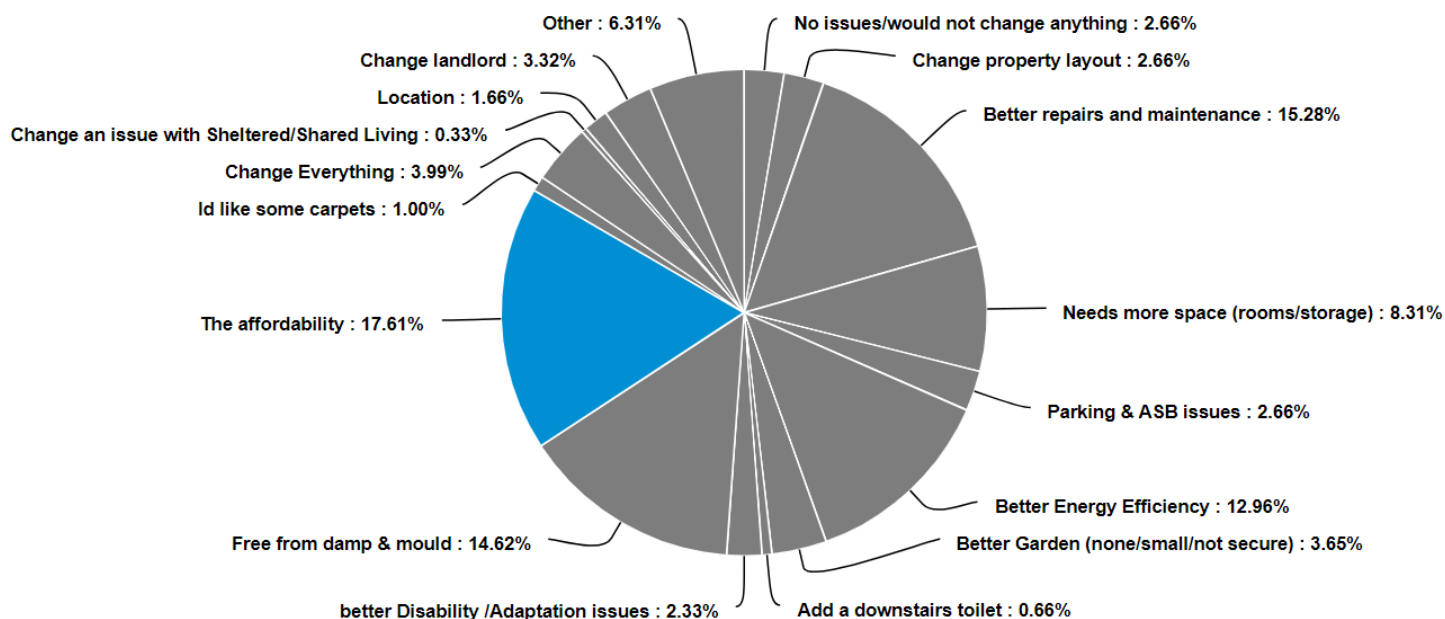


Compared with last year:

These answers are in line with last year.

- When filtered on age we didn't see much difference in age bands.

With regard the private renters and ONE thing they would change about their home



Comparisons between tenures

- Parking and ASB is 5 times more important to social housing tenants.
- In reverse, private renters would want their home more affordable than social housing renters.
- Social housing has a higher level of 'would not change anything' compared to the PRS.

Comments made by Private Renters

'I'd like to be more secure in the knowledge that I won't be evicted so they can hike up the rent for a new tenant'

'Allow pets', ' I would like to be allowed to have a cat'

'Very poor soundproofing'

'Security of tenure'

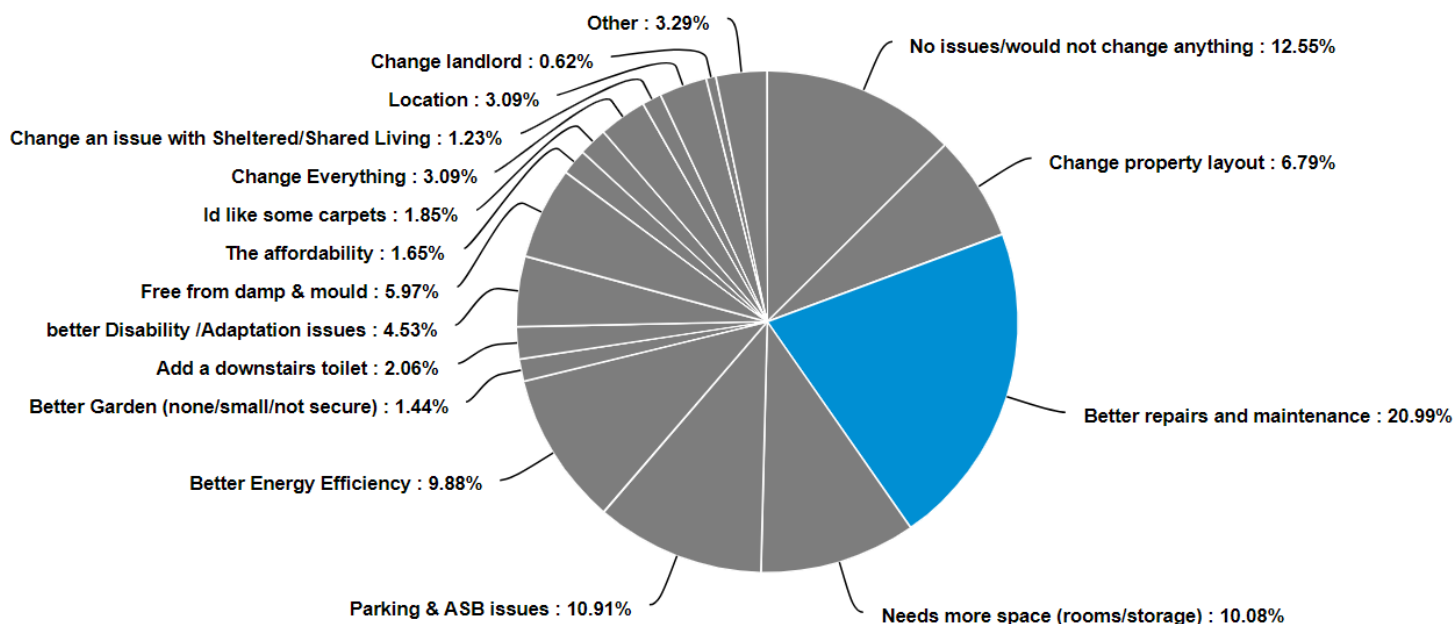
'Remove furniture that came with property'

'would like to rent a whole flat and not live in a HMO but a whole apartment to rent is just too expensive and at my age (45) it is depressing living in a HMO like a student'

'rent suggested to be 30% of income, mine is 70.5 % but I can't get any benefits as I have some savings, so I'm spending all my savings on rent'

'It was not cleaned before we moved in'

With regard the social housing tenants and ONE thing they would change



Comparison with last year

Many of the ONE change requests were similar to last year with regard damp & mould, parking and more storage. Most of them don't change in a year. We saw a fall in better energy efficiency'. Only positive was a notable improvement in 'would not change anything' going from 3% to 13%.

Comments on the ONE change:

Housing Association tenants

'Like to move to a different property to get away from antisocial behaviour'

'Change the neighbours'

'Harassment from one of the tenants'

'Change our storage heaters to heating we can put on when we need it'

'I'd like better repairs, free from rising damp and mould, garden, insulation, prefer if decoration and carpets were provided by landlord'

Local Authority Tenants

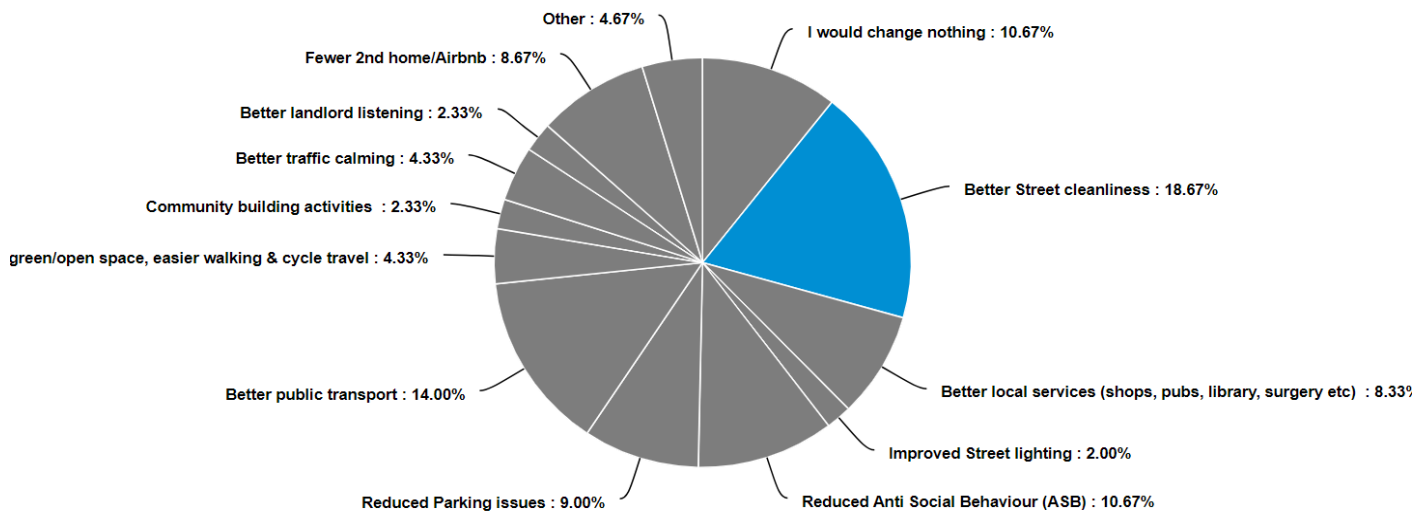
'I'd like a new kitchen'

'Love it to be free from damp'

Comments from social housing renters with protected characteristics regarding the 'one change to their home'

- *Needs more storage. Also parking issues bad*
- *Change landlord, better repairs, free from rising damp and mould, garden, insulation,*
- *Remove the 2 year time limit, I love my home, I don't want to move*
- *Solar panels as our son has a lot of medical equipment*
- *I'd prefer decoration and carpets was provided by them*

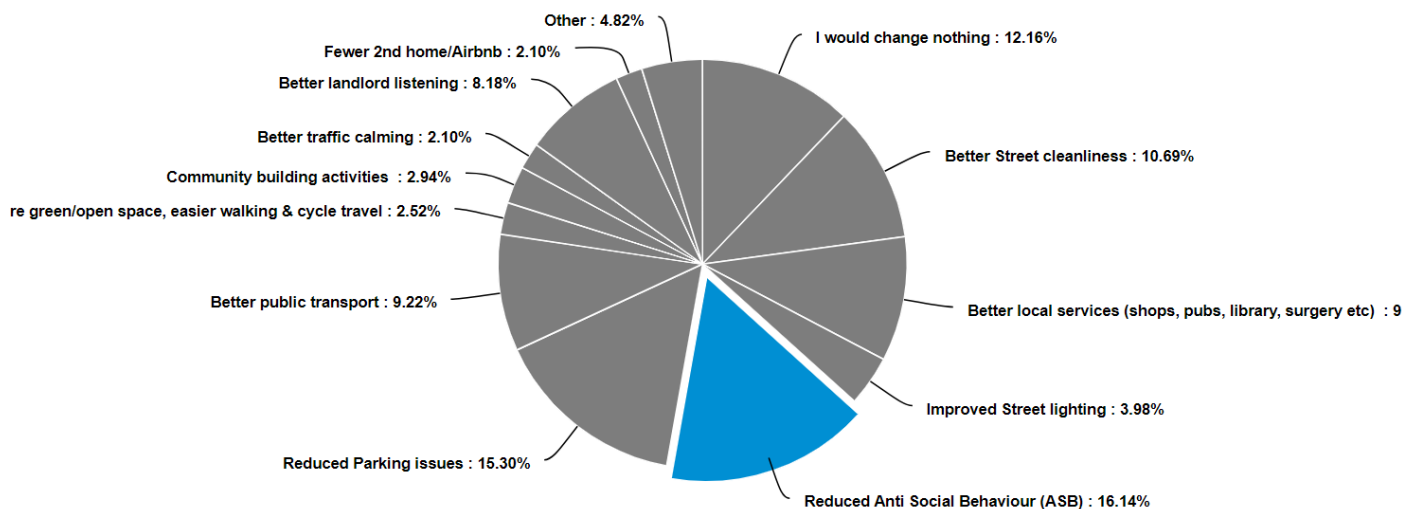
Private renters:



Comparison with last year

- 'Would not change anything' fell from 20% last year to 11% this year.
- Wanting 'better public transport' doubled to 9% and 'better street cleanliness' doubled.
- More 'Community building activities' fell from 7% to 2%
- Most of the 'other' categories stayed similar.

Social housing renters:



Comparison with last year

'Would not change anything' fell from 25% last year to 12% this year.

- Wanting 'better public transport' tripled to 14%.
- 'Reduce ASB' fell from 25% to 16% this year
- More 'Community building activities' fell from 5% to 3%
- Most of 'other' categories stayed similar

Housing Association renters' comments

'A bypass to reduce the traffic in the village'

'Rough neighbours and an alcoholic that lives opposite. Also a bipolar crazy lady that lives opposite not suitable around children either of them.'

'local electric car charging option'

'Better stuff for kids there nothing here'

Local Authority renters' comments

'More affordable housing for those who have grown up within the area'

'Ensure properties are well maintained & energy efficient'

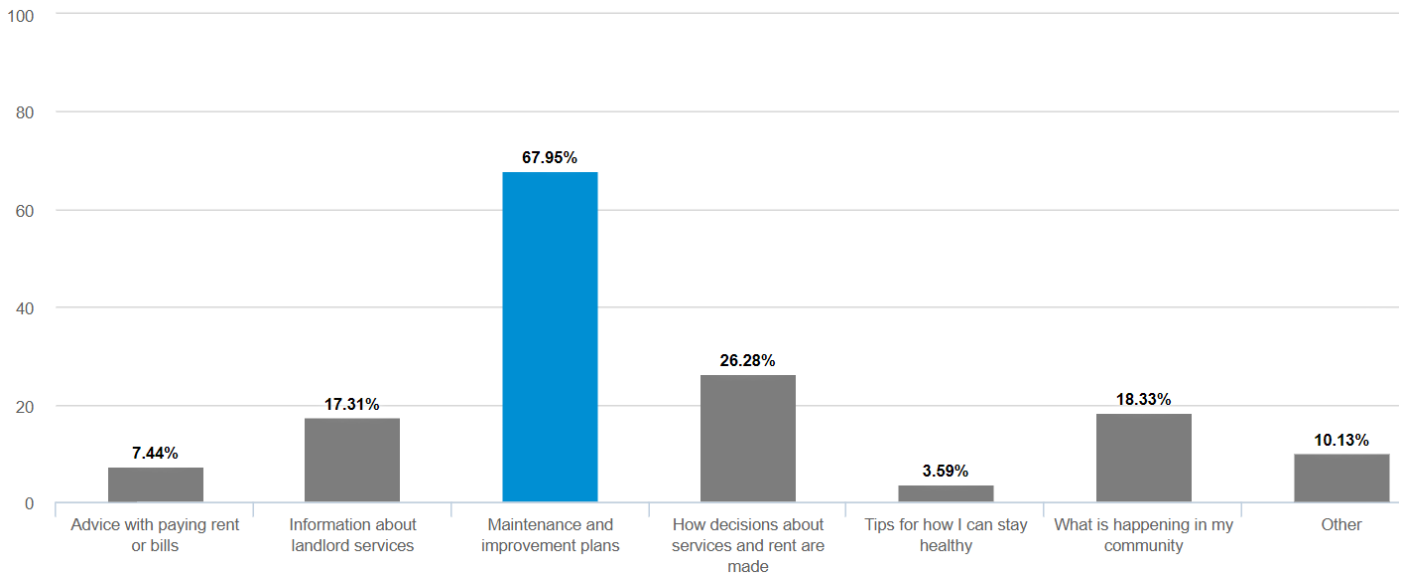
'More community space such as a coffee bar at the library, theatre space.'

'Wheelchair access to local shop and local park'

'Wish I could have had one of the two bedroom houses the council built across the road from me as that's all I need to be able to have a live-in carer.'

Question 13: What information from your landlord would be most useful?

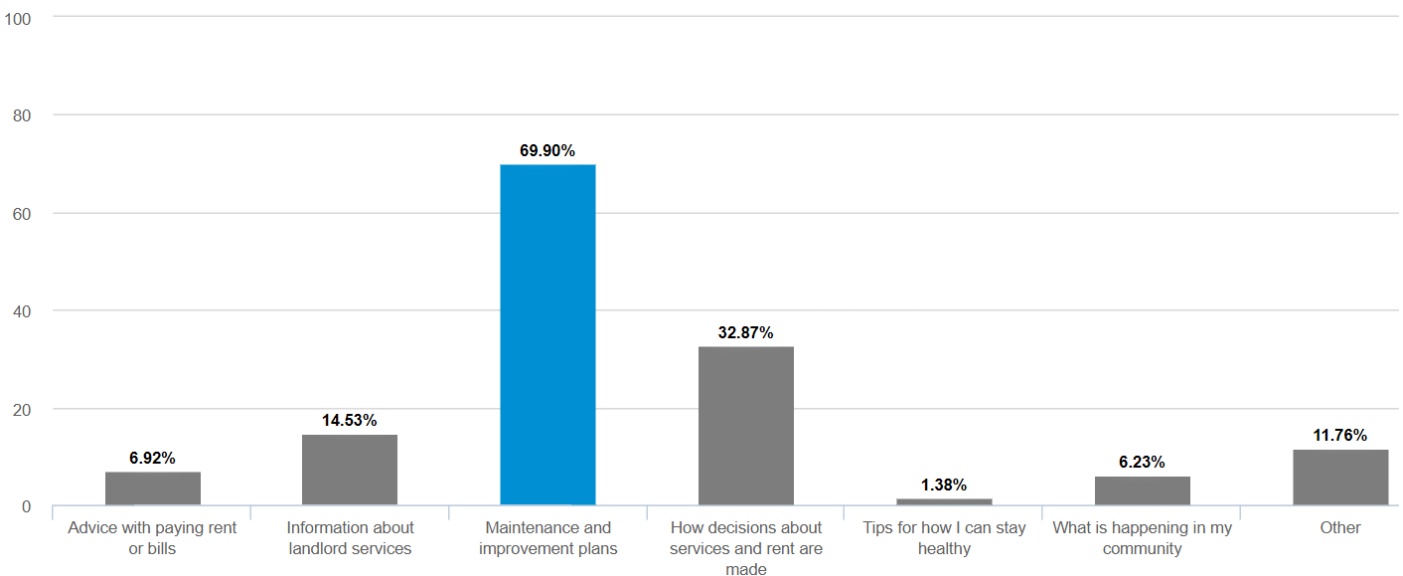
All Renters



Note: This is another one where there are many similarities in private and social housing, such as wanting to know about maintenance, how decisions are made on rent etc.

However, the transactional nature of private renting is more noticeable on options like 'What's happening in my community' where we see 26% of social tenants wanting information compared to 6% of private renters.

Private renters



Note: a number of private renters did not like this question. (last year we were specific, stating: 'I don't want to hear from my landlord' which on reflection should have been included this year. So, renters selected other and made their views clear).

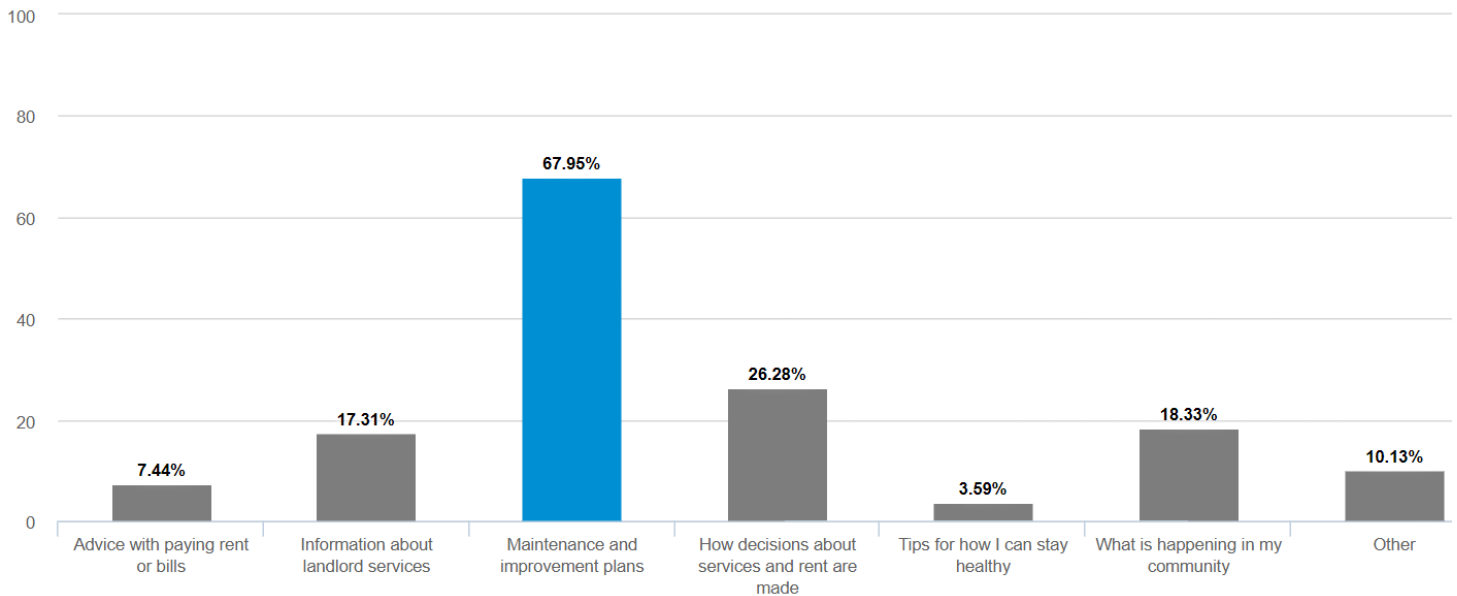
I want as little interaction with my landlord as possible. I definitely would NOT want advice from my landlord on how to pay bills or how to manage my health, that's extremely patronising.

Private renter, 31-45, Deaf or disabled, LGBTQ+

These options are all incredibly patronising. I don't need them to tell me how to pay bills or stay healthy, as if they're a grown-up and I'm a child. The only difference between them and us is that they possess the money and greed to get away with leeching off others.

Private renter, 18-30

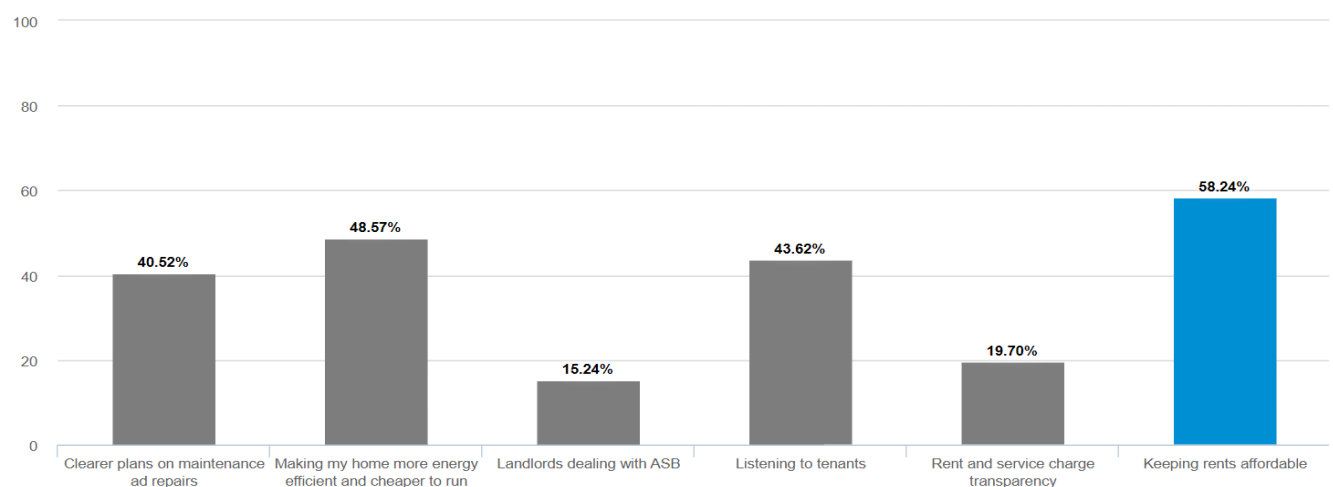
Social Housing renters



Note: The above results for social housing renters will resonate with a lot of the work done by tenant engagement teams

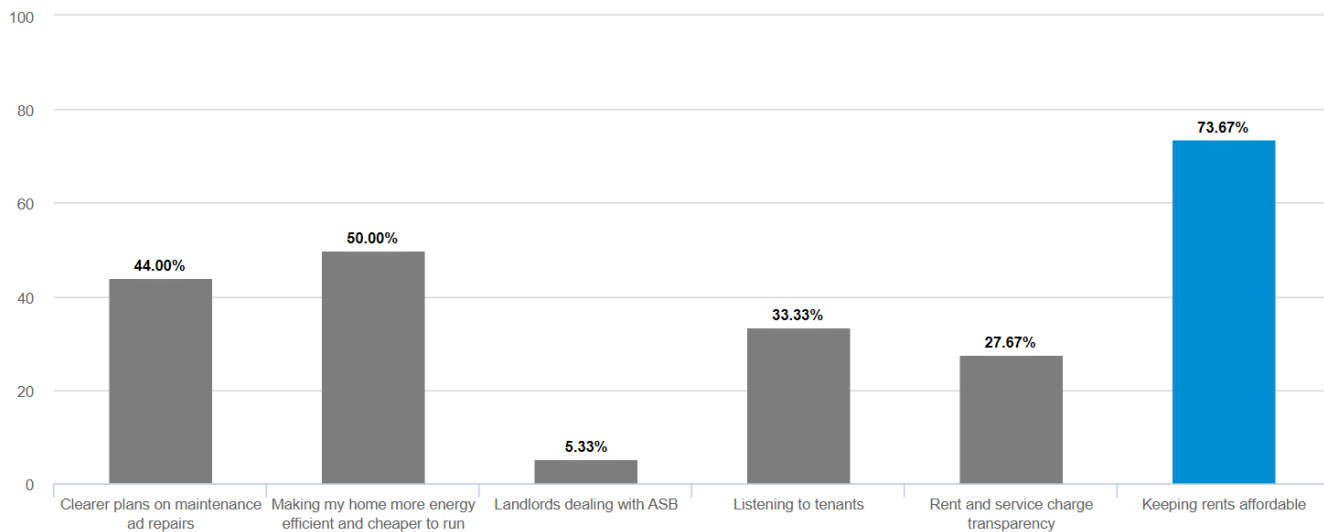
Question 14: What do you believe your landlord priorities should be?

All renters



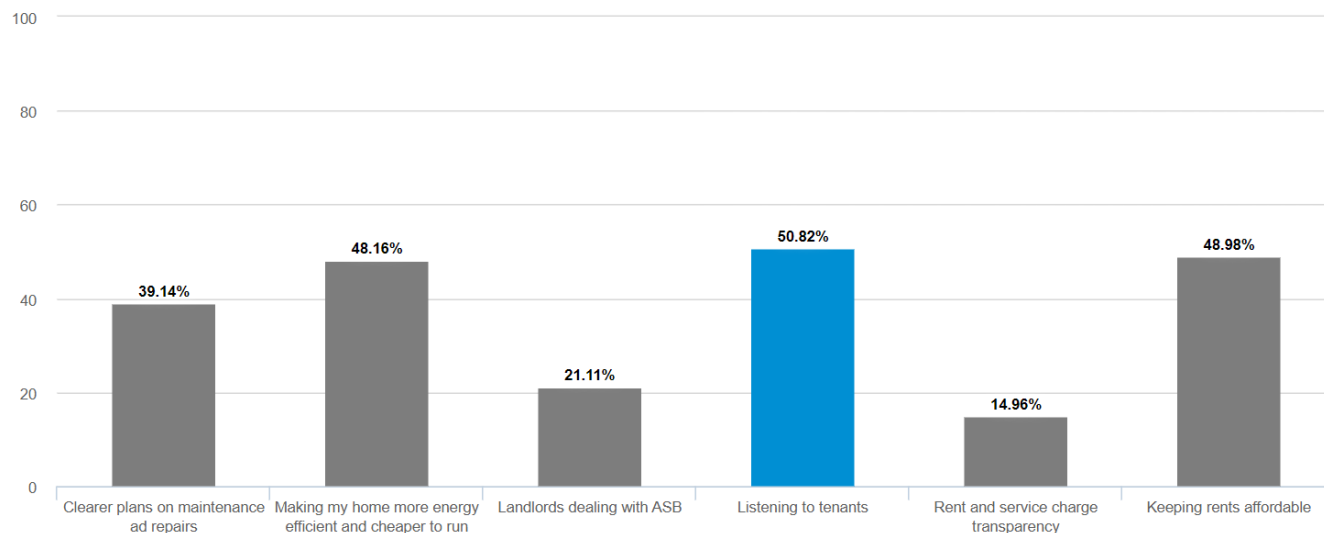
Note: For all landlords regardless of tenure – there are some clear themes around affordability, listening to tenants and supplying well maintained, energy efficient homes.

Private renters



- Consistent with previous responses, private renters have a strong desire for landlords to focus on keeping rents affordable and on service charge transparency.
- Private renters have a much lower desire (or expectations) for landlords to deal with ASB or 'listening to tenants'.

Social Housing renters



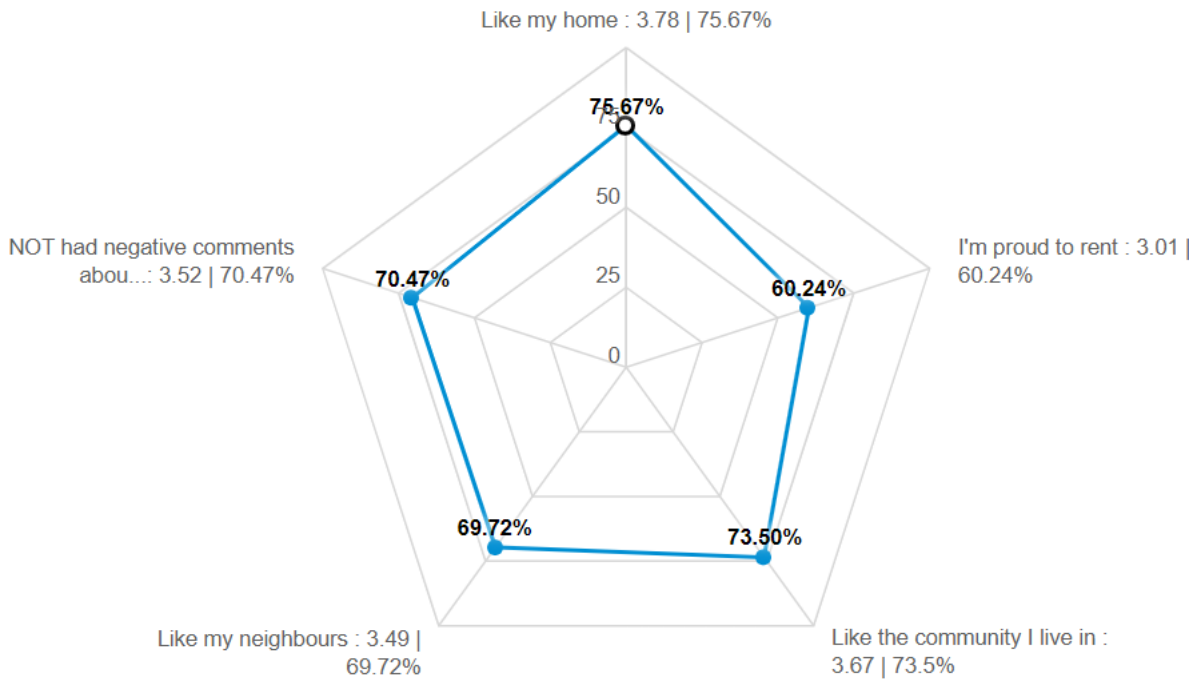
- Social housing renters have a much stronger desire and expectations around 'listening to tenants' and expecting landlords to 'deal with ASB'.
- Wanting more energy efficient homes has increased by 50%
- It's interesting that social housing tenants have lower prioritisation on better 'rent and service charge transparency'. Is that they already have some transparency or there is a higher level of trust?

Comparison with last year

'Clearer plans on Maintenance and Repairs' were the highest % last year.

Question 15: Which of these do you agree with?

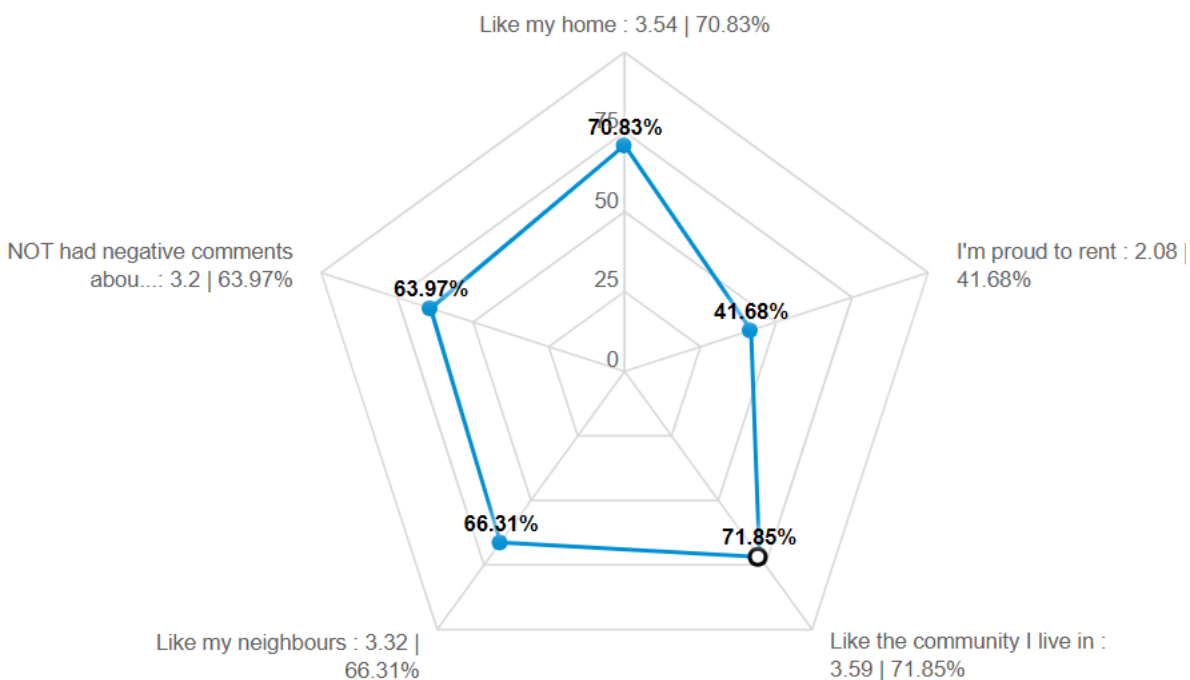
All tenants



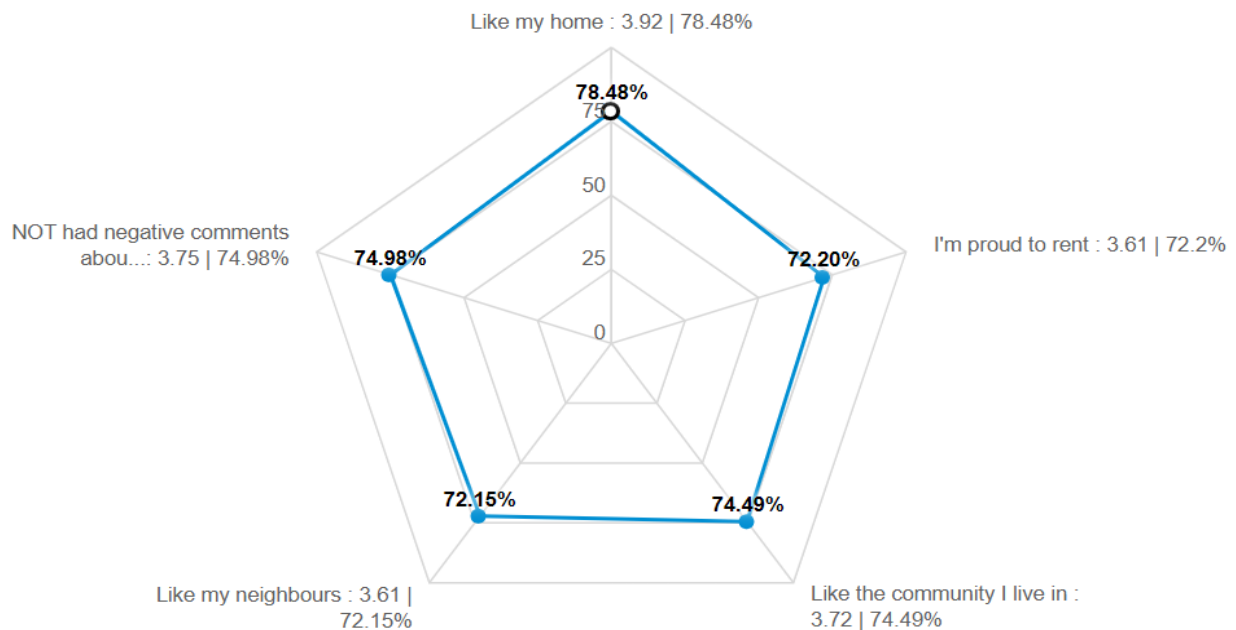
Context – this question was designed to explore some of the basic feelings around renting; how they felt about their home, community and how they felt as a renter. Have they received negative comments etc.

Overall, it is a positive result with averages of 70% on many of the metrics.

Private renters



Social housing tenants

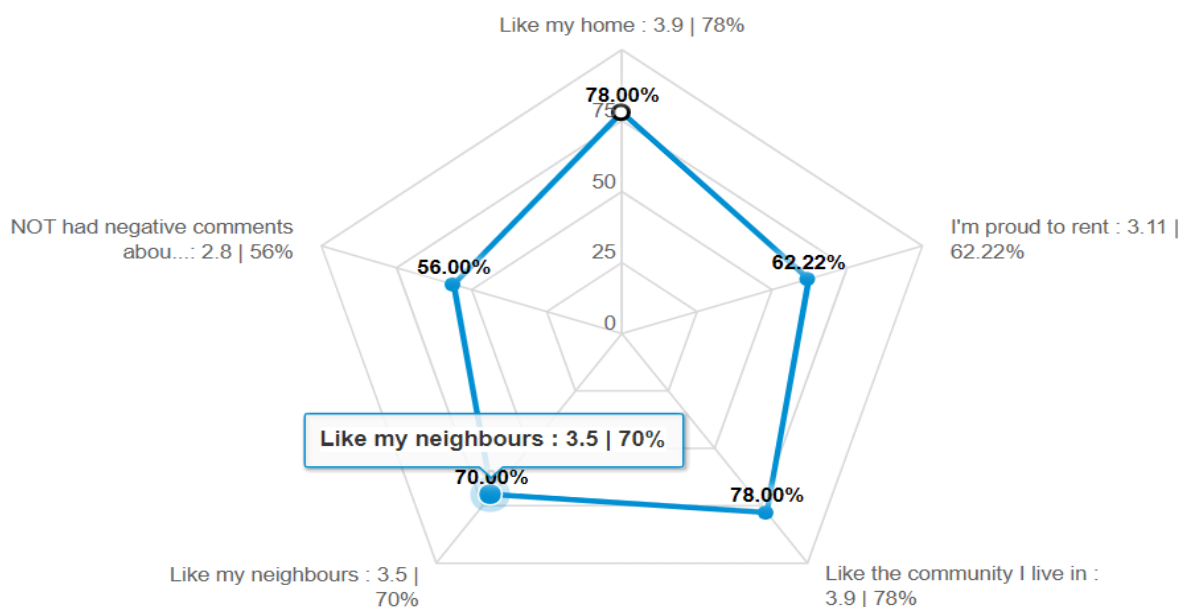


Observations of private and social renter responses:

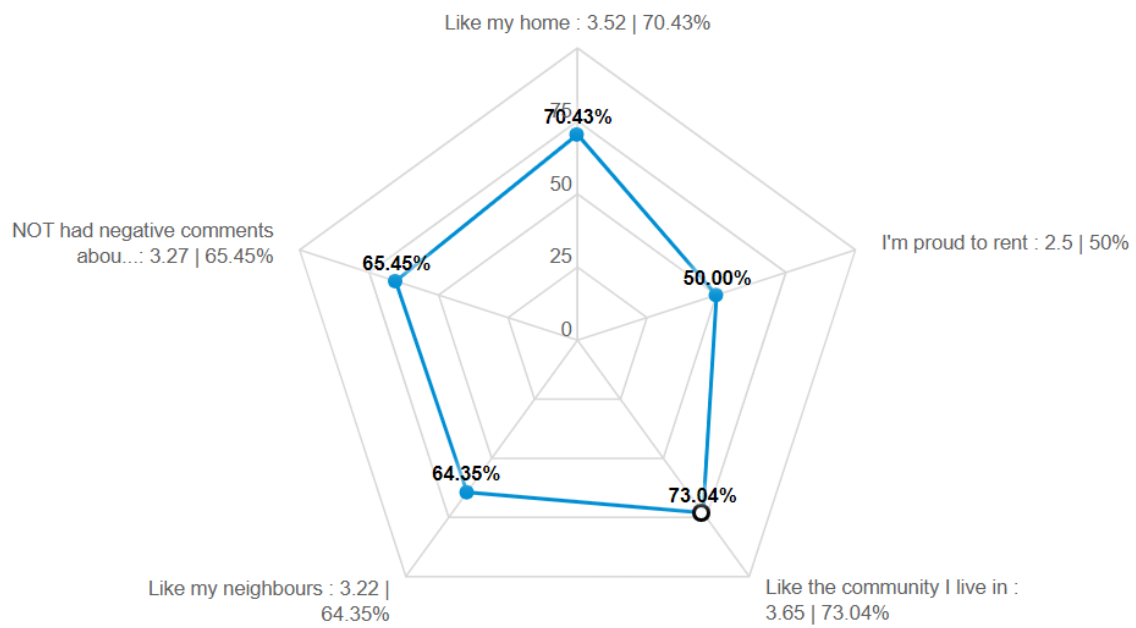
- 42% of private renters are proud to rent compared to 72% for social housing. It's been emphasised many times that social housing suits many people who need adaptations, or have had difficult housing experiences and value the stability and security that social renting brings.
- We also see above a more sentimental view of their home from social renters.
- Lots of similarities in terms of liking/disliking neighbours and community.

Of note: Some of lowest levels of satisfaction were on two of the metrics with Black and Ethnic Minority renters. We identified that some of the BAME renters had received negative comments about living in social and private when comparing with the wider renter population.

Filter: social housing: BAME

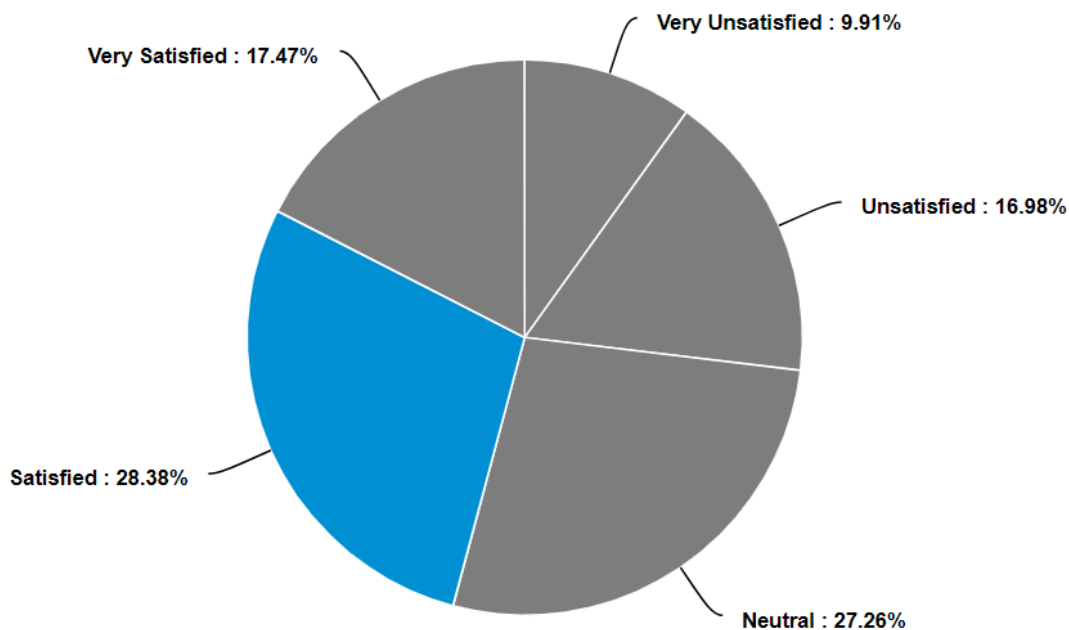


Filter – private renting, BAME



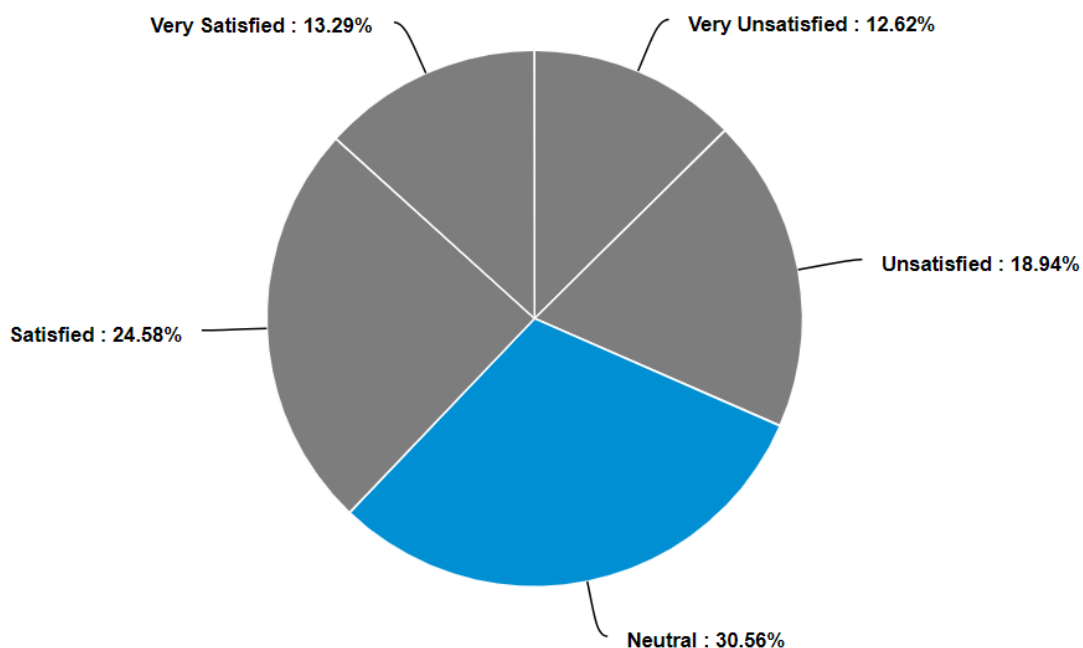
Question 16: Final survey question. How satisfied are you with your landlord?

All Renters



Based on the analysis above, there is a fair degree of satisfaction. From the two graphs below, we see that social housing renters are happier with their landlord than private renters.

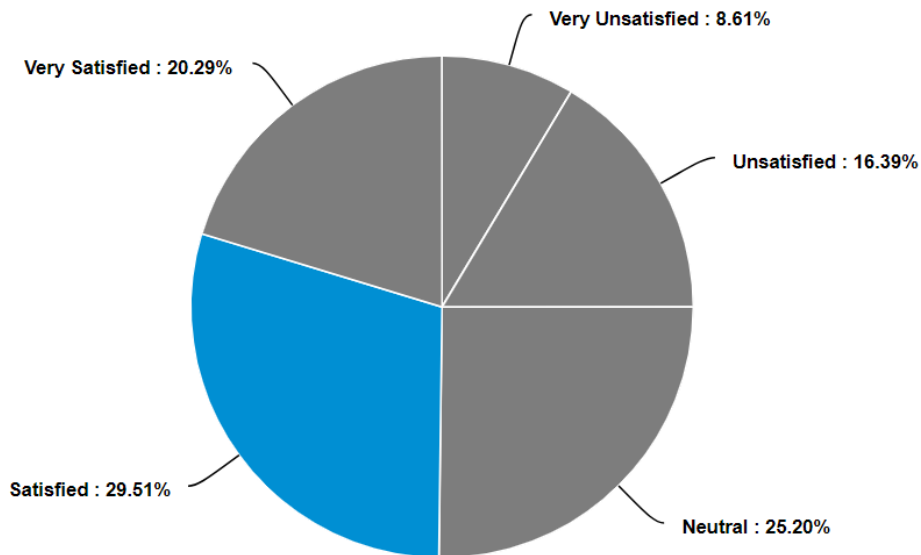
Private Renters



Comparison with last year

The private renter sentiment is very similar to last year, with no significant differences.

Social housing renters



Comparison with last year

The social housing sentiment has improved significantly. Some of that will be due to continued work of social landlords. Our Sept 23 Rent Pulse also revealed that whilst social renters were not completely happy, they were grateful that they were not in the private rental sector, and therefore more positive about what they had.

	Last year	This year
Very unsatisfied / unsatisfied	35	25
Neutral	27	25
Satisfied / Very Satisfied	36	50

Bonus Insight: our adverts to Pulse asked /subreddits across Wales if they **could ask their landlord one thing what would it be?**

Financial Concerns and Rent Issues:

"Make it easier for graduates to rent."

"Stop intentionally charging more rent than housing benefit will allow."

"Stop making everyone pay in cash."

General Landlord Sentiments and Experiences:

"Just because we're friendly doesn't mean we are open to friendship- or unwanted 'friendly-fun' comments."

"Just because you're a landlord doesn't mean you can exploit your tenant's situation to line your own pockets and run your own racketeering."

"That I love you, and that you will always have my unwavering devotion and support for providing shelter for my family, and for weathering the economic storm on our behalf."

"[Cardiff Letting Agent] are still stealing deposits for 'fixes and repairs' that are never actually done. How can they keep getting away with it?"

Student Accommodation Issues:

"Not only Students live in Swansea... Student properties need to be on their OWN website."

"One for Swansea University Accommodation Service - a mattress with no bed isn't a furnished flat. Having it like this for a month and still having to pay full price wasn't acceptable."

"Asking the Student Advice Service for support; them agreeing it wasn't acceptable to fine me; only to say it was a conflict of interest once they found out it was the lettings side of the Uni, and that they can't help was tacky."

Rental Property Condition & Maintenance

"My previous LL turned the flat below the one I rented into an Airbnb overnight with no warning and made my life hell for months with constant partying below us."

"That removing the gas fire and replacing the large radiator with a smaller one has left the place freezing."

A few too many of my rental houses had damp. A lot of landlords are reluctant to do anything about it."

"I would tell her that I know that the people she hires to fix things are a glazier company, and that they are incompetent at fixing plumbing, electrical problems and carpentry issues."

"I want the windows that are growing mould replaced and the fireplace that I'm pretty sure hasn't been legally allowed in homes for a while to be removed, so I don't half freeze to death in winter."

"Improve the insulation. Winter is hell with some rooms being near-uninhabitable, and the house doesn't have any insulation as far as we're aware."

Landlord-Tenant Communication and Relationship:

"Stop putting my rent up because you had to fix an issue."

"I'd tell mine to just sort out the issues I've pointed out going back 5 years, if me and my family are forced to be in overcrowded accommodation, at least make it somewhat comfortable."

"I'd tell mine to stop just entering the property unannounced whenever the hell you want or I'm taking you to court."

"Less a landlord issue and more a letting agency issue - I'd love for them to stop sending passive aggressive scaremonger emails around wintertime about how tenants are liable for damp / pipes bursting in winter. "

"A lot of people are having to choose between heating their homes or eating well. How about you [landlord] email us telling us how YOU can support us during difficult and costly winters?"

Conclusion

As with the previous two years, this report has explored the views of tenants from both the social and private housing sector. It has investigated tenants' perceptions and attitudes towards their homes, their communities and the issues that matter to them the most.

Over 1000 tenants across Wales have shared their views with us, many of which have identified that they are struggling significantly with affordability. The cost-of-living crisis is hugely impacting those living in the private rental sector and this cannot be simply tossed to one side. There is a demonstrated need to make homes more affordable than the current market rents as the lack of rent regulation within the PRS will, undoubtedly lead to unintended consequences.

Whilst we have seen improvements in the communications between tenants and landlords in the social housing sector, tenants are not seeing an improvement in their repairs and maintenance. They continue to see the development of new social housing, which is, of course essential, but the relativity of that doesn't exist without the necessary information from landlords. Tenants need to be educated on the importance and benefit of new build developments and provided with the evidence of the work that is being done on repairs and maintenance.

We are aware of the continuation of policy developments in Welsh Housing, that will provide better homes for the Welsh people, but the singular focus on social housing, whilst so many in the private sector are struggling, needs to be considered.

We have developed a set of recommendations, and we are happy to support the implementation of these with those we have identified. Some of the findings within this report align with our previous Pulse on the green paper. [For further information, see here.](#)

Recommendations

- Wales Local Government Association and Community Housing Cymru to acknowledge and react to the frustrations of tenants identified in this report around lack of maintenance and repairs due to new developments.
- Whilst we continue to focus the efforts in Wales on retrofitting social housing; this report acts as a key informer that the need to expand such efforts into the PRS couldn't be more important.
- Welsh Government need to develop an All-Wales Housing Strategy that accounts for the limitations of tenants within the private sector who are being overlooked.
- Social landlords need to use the findings of this report, compare and contrast its own organisational activities and consider any changes to its plans.

Next Steps

Tenants have given us their 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) We will be sending this report 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 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.

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

About TPAS Cymru



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 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 Welsh Government. We aim to:

1. Find out what matters most to tenants
2. Release regular surveys
3. Hold prize draws to reward people who take part

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

Notes:

- 1) To meet one of our team to discuss the points raised, please contact: Elizabeth Taylor at elizabeth@tpas.cymru.
- 2) Media enquiries; contact David Wilton drw@tpas.cymru / 07896871164
- 3) To view our other Pulse Reports please visit www.tpas.cymru/pulse
- 4) To learn more about Tenant Pulse, and request promotional material for awareness building, contact: eleonor@tpas.cymru