



# TENANT PULSE FINDINGS



**ENERGY EFFICIENCY & AFFORDABLE WARMTH'26**




# ABOUT TENANT PULSE

- National platform for Wales that enable tenants and renters to provide accounts of their experiences.
- Annual surveys, topical surveys, specific audience surveys, short surveys.
- Database that has 1500+ tenants across tenures

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**TENANT VOICE ON  
ENERGY EFFICIENCY &  
AFFORDABLE WARMTH**


APRIL 2026  
WWW.TPAS.CYMRU

**codi**   
TENANT VOICE

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**LLAIS Y TENANT AR  
EFFEITHLONRWYDD  
YNNI A CHYNHESRWYDD  
FFORDDIADWY**

EBRILL2026  
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NODDWYR LLAIS Y TENANT

Arannir yn Rhannol gan  
Llywodraeth Cymru  
Part Funded by  
Welsh Government



# THE TPAG

**The Tenant Pulse Advisory Group - TPAG is made up of 16 PRS tenants and 100 Social Housing tenants from across Wales.**

**The group is diverse, aged between 18-65+ coming from different socio - economic background.  
(representative of 22 LAs)**

**We also took help from TPAG to review and provide feedback on Tenant Pulse before we launched it.**





# THE WINNERS!



**MICHELLE DANIELS - TENANT FROM CARDIFF**  
**SIAN HOPE - TENANT FROM WREXHAM**

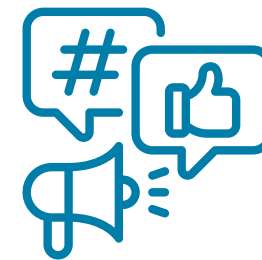


# HOW DID WE PROMOTE?

**The survey is sent to tenants who have signed up to our Tenant Pulse database.**

**It is promoted on all TPAS Cymru social media accounts – Facebook, LinkedIn, Instagram, TikTok.**

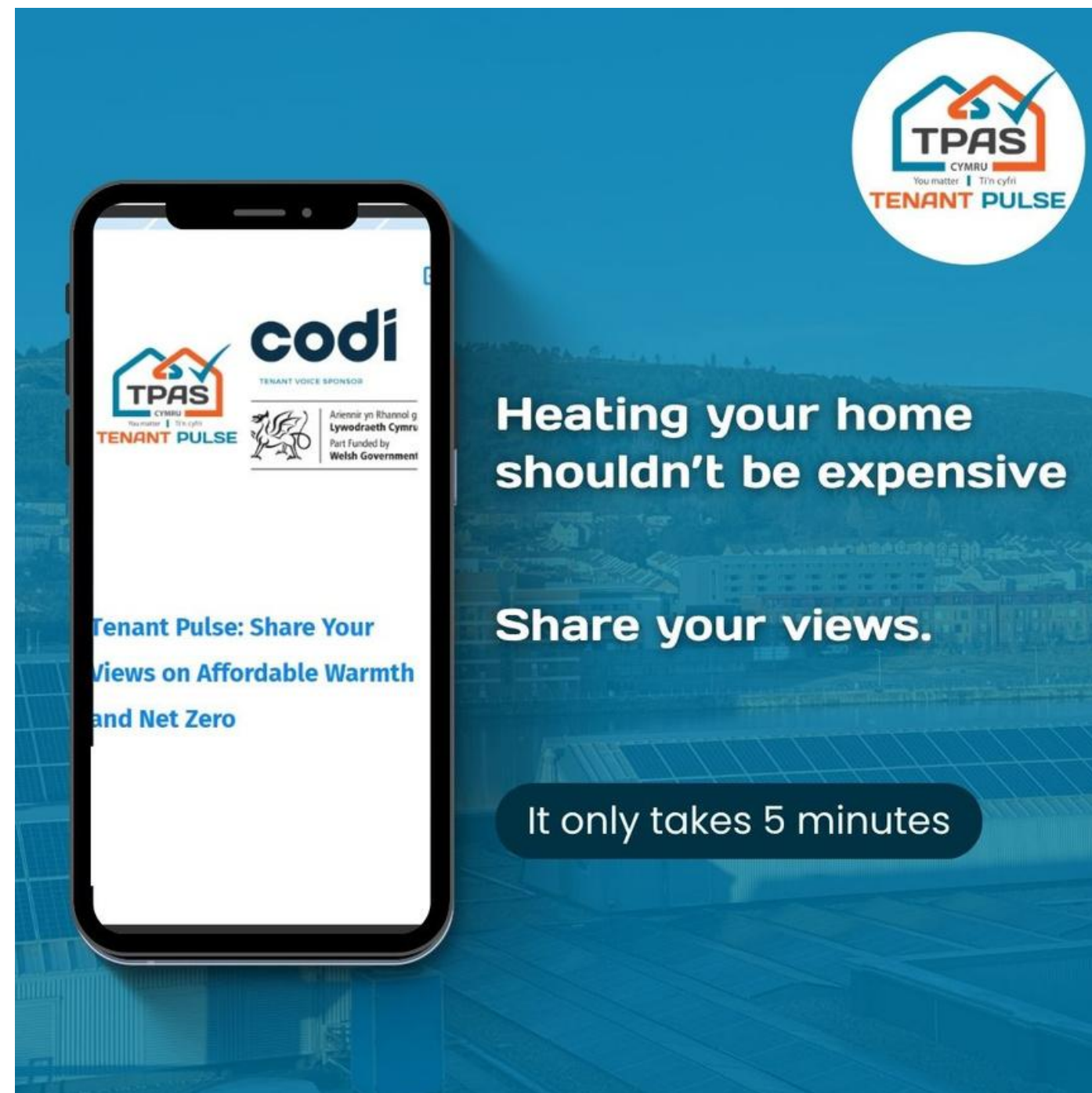
**We sent it to social landlords and tenant group to promote.**



**Meta (Facebook/Instagram) Ads- we run a paid media advertisement to reach young renters, this has created a more diverse respondent group.**



# THIS YEAR'S FACEBOOK AD-

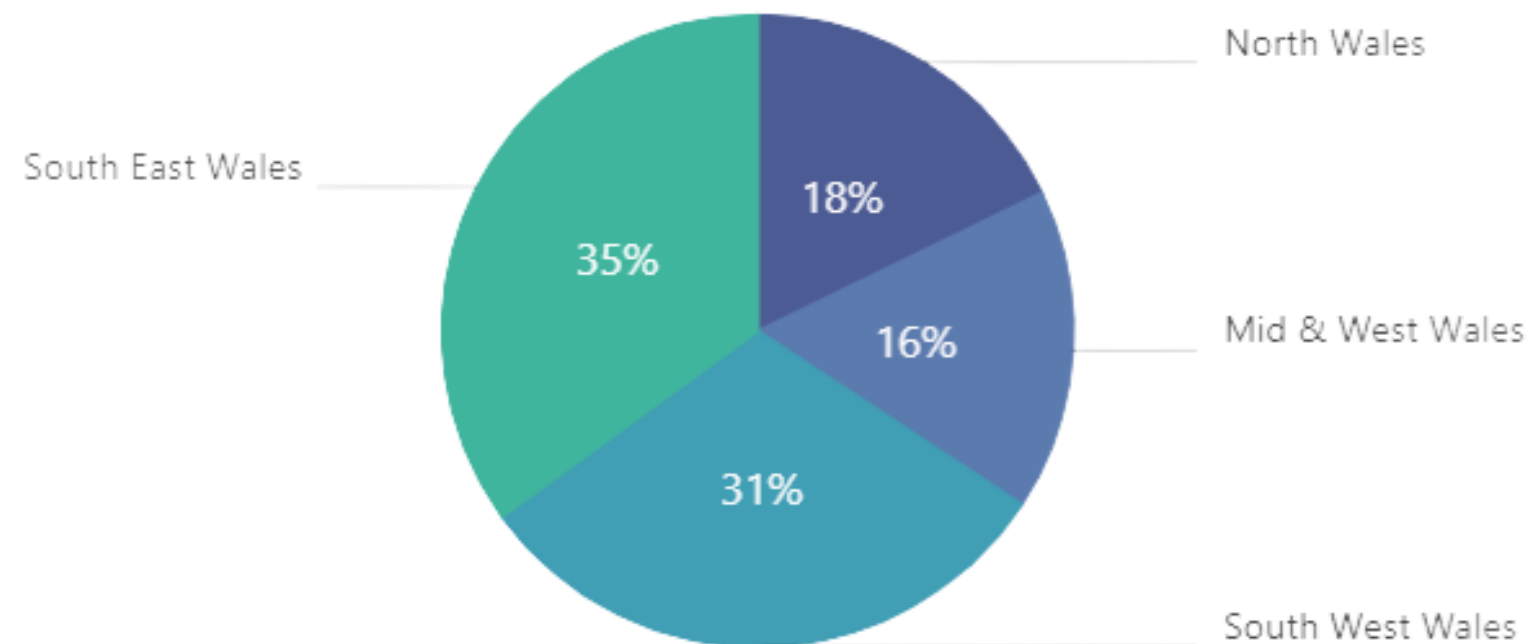


- We ran 14 creatives using a mix of images and video. We served 238,000 adverts to 140,000 people in Wales. The campaign used a mix of targeted interests.
- In total, this advertisement and promotion campaign supported the success of our response rate and encouraged a response from a more diverse range of tenant voices.

# WHO TOOK PART?

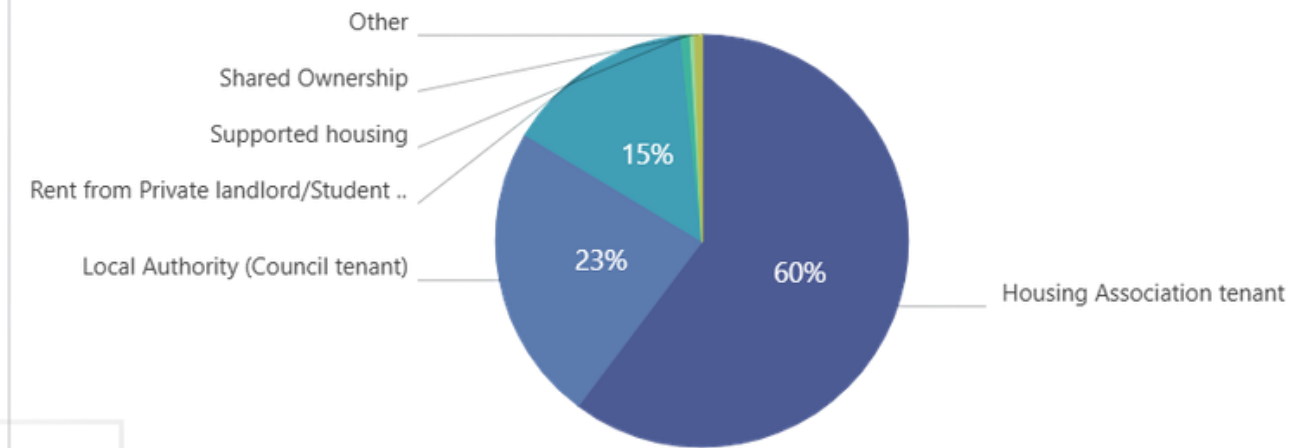
Responses across all regions, highest from:

- South East (35%)
- South West (30%)



## Not just Social Housing

- Housing Association: 60%
- Local Authority: 23%
- Private Rented Sector: 15%



## Reaching more diverse voices

- 5% from Underrepresented Group
- ↑ +1% vs Net Zero Survey (2025)
- ↑ +2% vs Annual Tenant Pulse (2025)

## Age Profile

- 60+ → 50%
- 46–60 → 28%





01. Heating Affordability: The Cost of Staying Warm
02. Attitudes and Perceptions: EPC, Smart Meters and Tariffs
03. Looking Ahead: Information and Support
04. Different Pathways: Social Housing & PRS



# WHY THIS MATTERS NOW?

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**TENANT PULSE**

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TENANT VOICE SPONSOR

Atennir yn Rhannol g  
Lywodraeth Cymru  
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**Heating your home  
shouldn't be expensive**

**Share your views.**

It only takes 5 minutes

- April 2026: price cap ↓ 7% (£117)
- Forecast: increases expected from July
- Ongoing volatility, not resolution
- Housing = 27% of national energy use

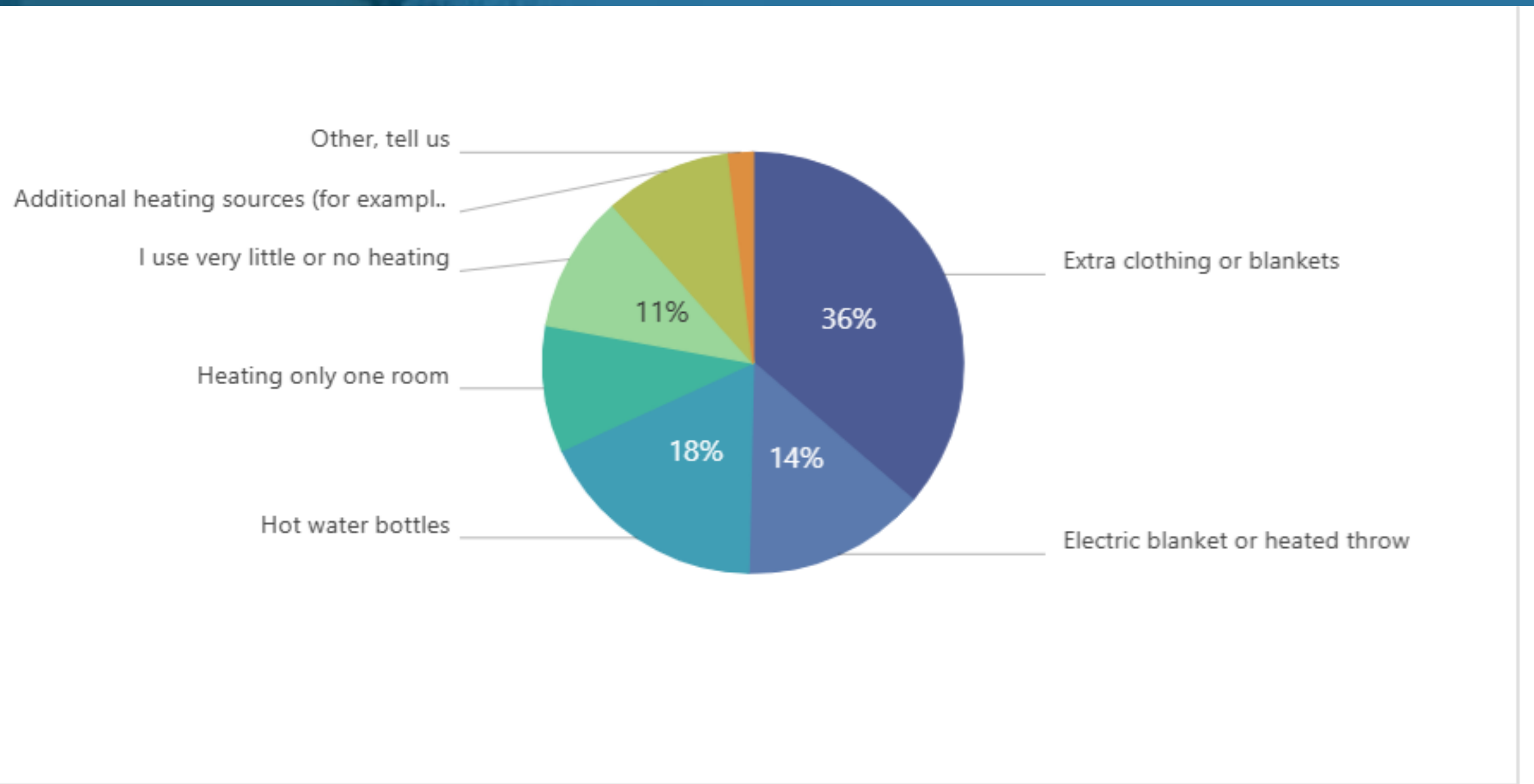
# WARMTH IS NEGOTIATED, NOT GUARANTEED

- Only 23% say heating is affordable
- Comfort is often inconsistent rather than absent

*‘I go to bed about 5pm with an 18 tog duvet because I feel the cold’*

*‘My flat is supposed to be modern with double glazing – it’s draughty and so cold I can keep milk fresh for a week without refrigeration.’*





# COPING AND ADAPTING



# TENANTS ARE ADAPTING BUT ADAPTATION IS NOT THE SAME AS COMFORT

- 86% use blankets or extra clothing
- 1 in 4 use very little or no heating
- One-room heating, early nights, hot water bottles  
electric throws



*Behavioural adaptation strongest among older tenants*

# WHO IS STRUGGLING THE MOST?

**31 – 45:**

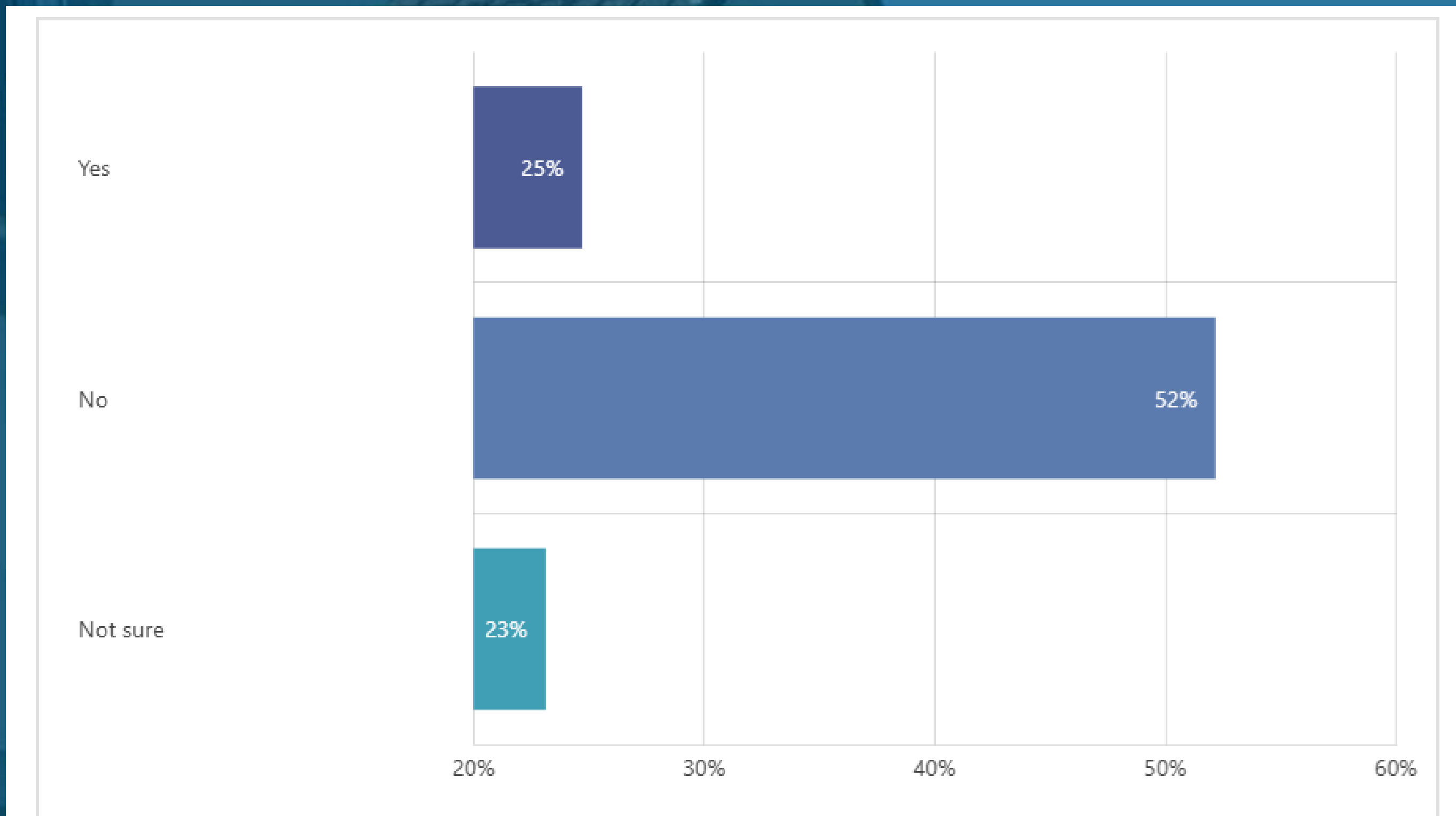
- **49% cannot afford**
- **88% struggling**

**Cost-of-living pressures disproportionately affecting working households**

**A large share of financially strained households fall outside standard vulnerability categories.**



# EPC Awareness



# DO TENANTS KNOW THEIR EPC RATING?

**Only 25%  
aware**

**Younger tenants  
(18–30 highest awareness)**

**Private renters more aware  
than social housing tenants  
41% vs 22%**

- Partial / inconsistent understanding
- Confusion even among “aware” respondents
- EPCs are visible in rental listings (PRS)
- Less visible in social housing.
- Most reported EPC:
  - C and D

## Case from survey

- Tenant reports EPC rating = G
- Older tenant (60+)
- Social housing (Local Authority)
- Uses blankets
- Uses little or no heating



# SMART METERS: TRUST & UNDERSTANDING

- **68% reported of having a smart meter.**
- **Higher in social housing with 72% and PRS: 48%**
- **Those aged 31+ report consistently higher smart meter uptake (68–69%) than those aged 18–30**





# WHAT DOES THIS MEAN?

## Trust issues

- Concerns about incorrect billing or higher costs
- May lead to stress or reduced heating use. “Bad publicity”

## Landlord barriers

- Landlords not allowing installation
- Concerns about having to reinstall old meters
- Properties with sub-metering or communal systems

## Technical & Health constraints

- No space for installation
- Requests for accessible meters (e.g. RNIB approved) not fulfilled
- Difficulty accessing meters (e.g. height, location)

## Not offered or not provided

- They had not been offered a smart meter
- Their supplier had not provided one.
- Requests had been made but not followed up



# TARIFF SWITCHING

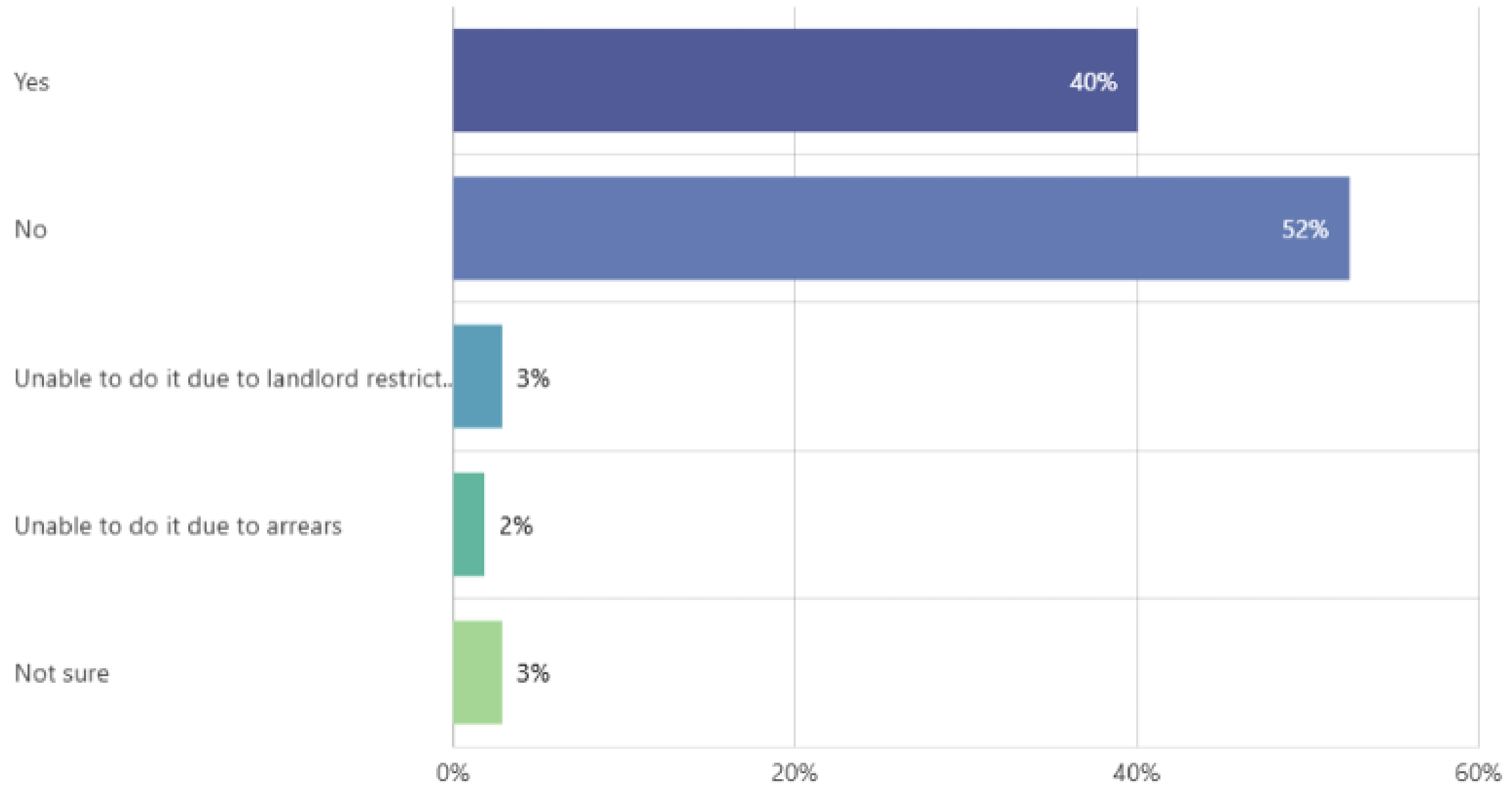
“UK households can typically save around £150–£200 a year by switching to a better tariff—and in some cases over £200.”



# TARIFF SWITCHING

- **Only 40% switched**
- **Market assumes active consumer behaviour**
- **Switching is highest among those aged 31–45 (45%) and lowest among those aged 18–30 (12%), showing a clear gap between age groups.**





## Options we provided.



# HOW DO TENANTS WANT COMMUNICATION?

## Finding

- Email dominant
- Letters still critical



## Who differs

- Older tenants → letters
- PRS → more visual/digital



## What works?

One-size communication will not work.

Digital-first policy push  
Increasing “information fatigue” across public services

More communication ≠ better engagement.



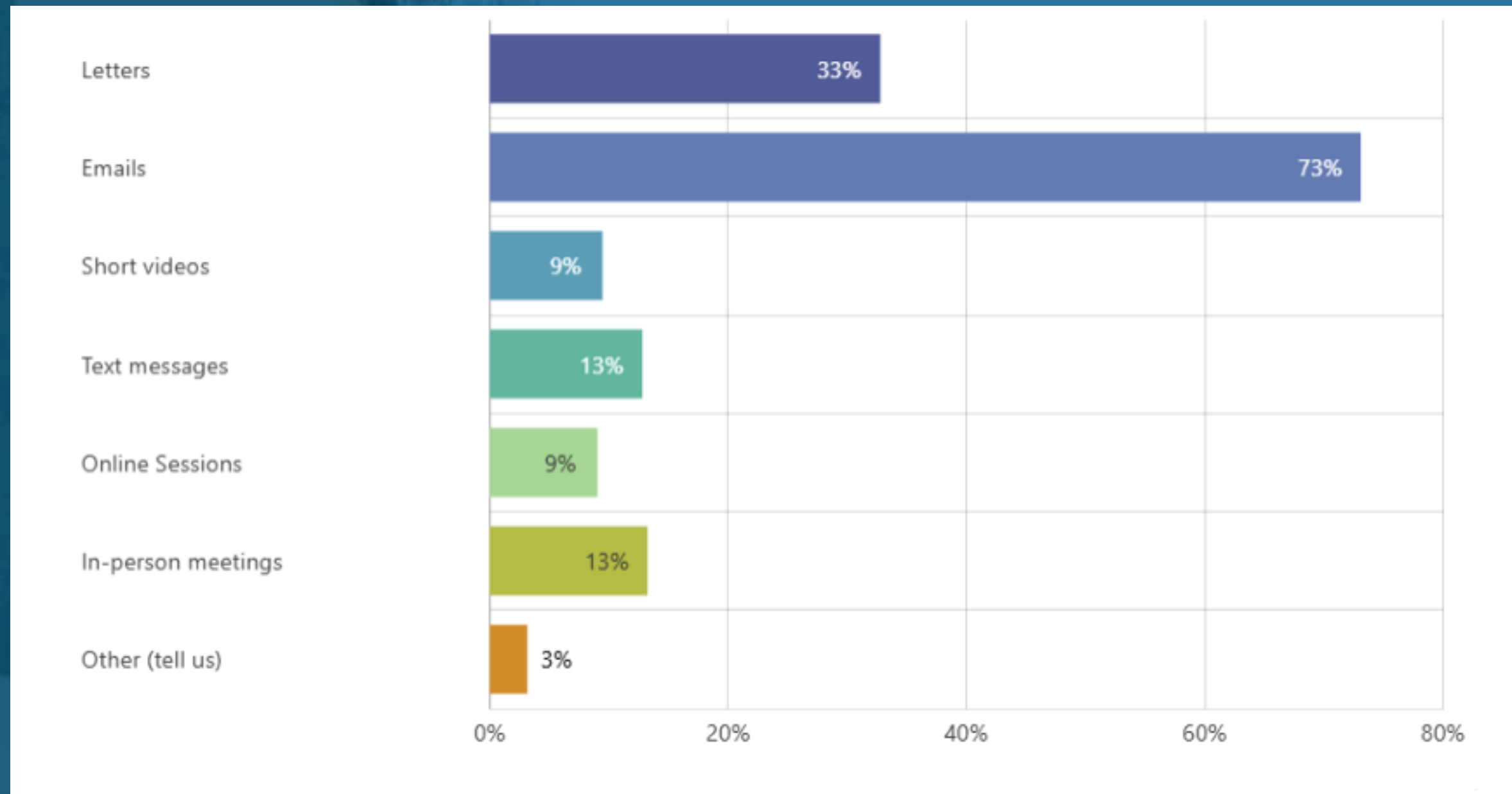
## Tenant Insights

Tenants highlight housing conditions, not information gaps

Retrofit policy assumes knowledge → behaviour

For many tenants, the problem is not awareness—it is the home itself.





**Other: preference for direct/one to one support; ‘not looking for added stress’; focus on condition rather than advice, web based.**



# DIFFERENT PATHWAYS

QUESTIONS ONLY FOR SOCIAL HOUSING TENANTS

*“WHQS is being implemented but not consistently experienced.”*



## Awareness of WHQS / assessments

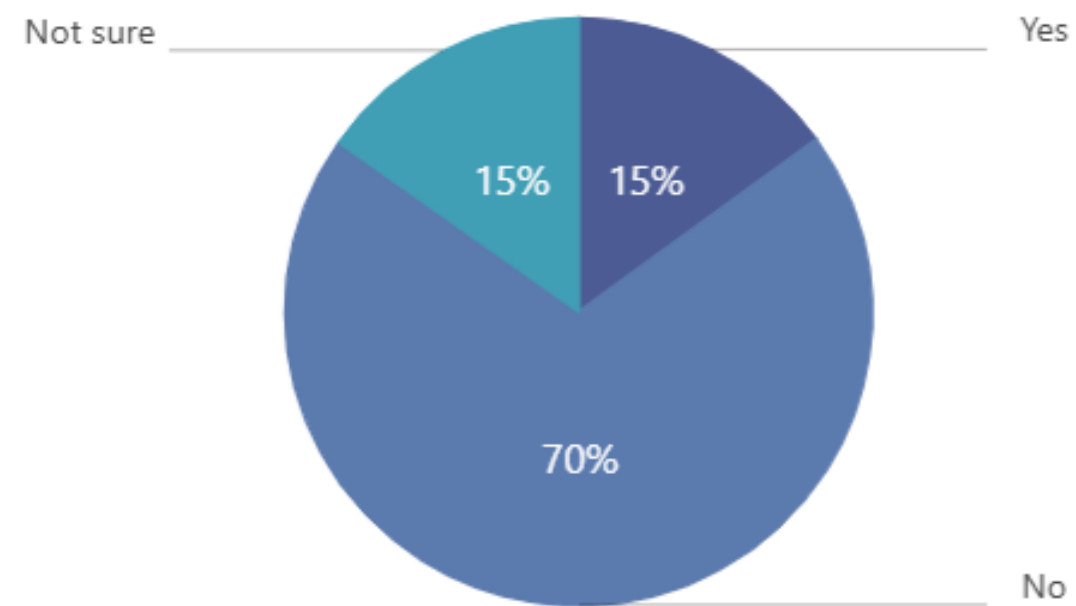
- Only 26% recall assessment
- 33% unaware

- North Wales:
- 36% tenants could recall assessments (highest)
- Delivery appears more visible in North Wales

## Landlord communication

- Only 15% informed
- Southeast: 10% (lowest)
- North Wales: 17% (highest)

- Local Authority tenants (lowest communication) (77%)
- Local Authorities higher “no assessment” responses (46%)



**Has your landlord communicated energy efficiency improvement plan?**





# DIFFERENT PATHWAYS

QUESTIONS ONLY FOR PRS TENANTS

*“Choice isn’t an option when you are faced with homelessness,”*

## EPC Influence on Decision

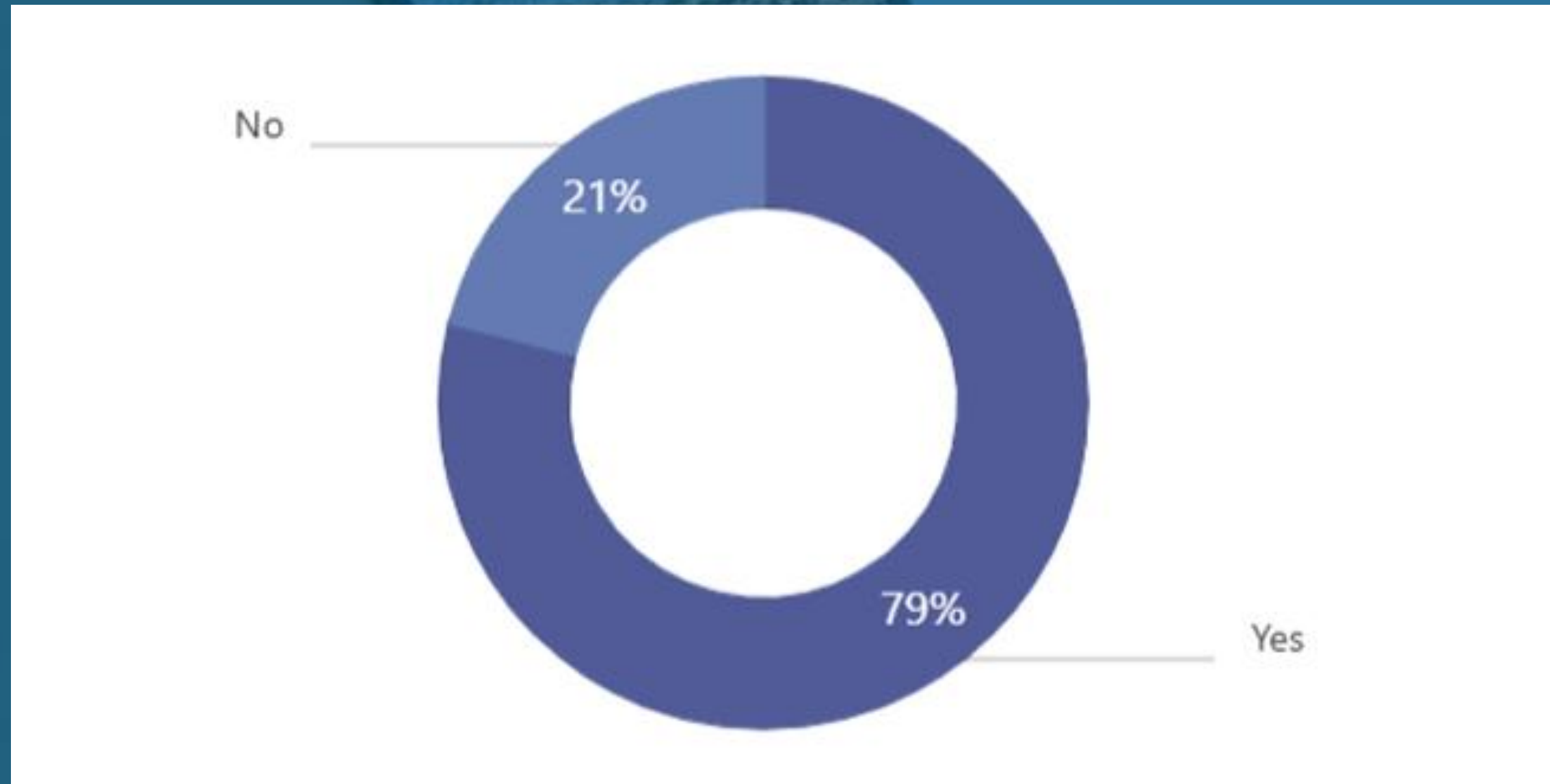
- Only 10% influenced
- Housing shortage limits tenant choice

- South West: 21% (highest)
- Those aged 18–30 show the highest influence, with 33% saying EPC affected their decision

## Staying longer in an energy efficient home

- 79% would stay longer if efficient.

Improving energy efficiency is not just about compliance, it has a direct impact on tenant retention.



**Despite upcoming changes that will require privately rented homes to meet higher energy efficiency standards, our findings suggest that EPC ratings are not currently influencing tenant decision-making.**

# RECOMMENDATIONS

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

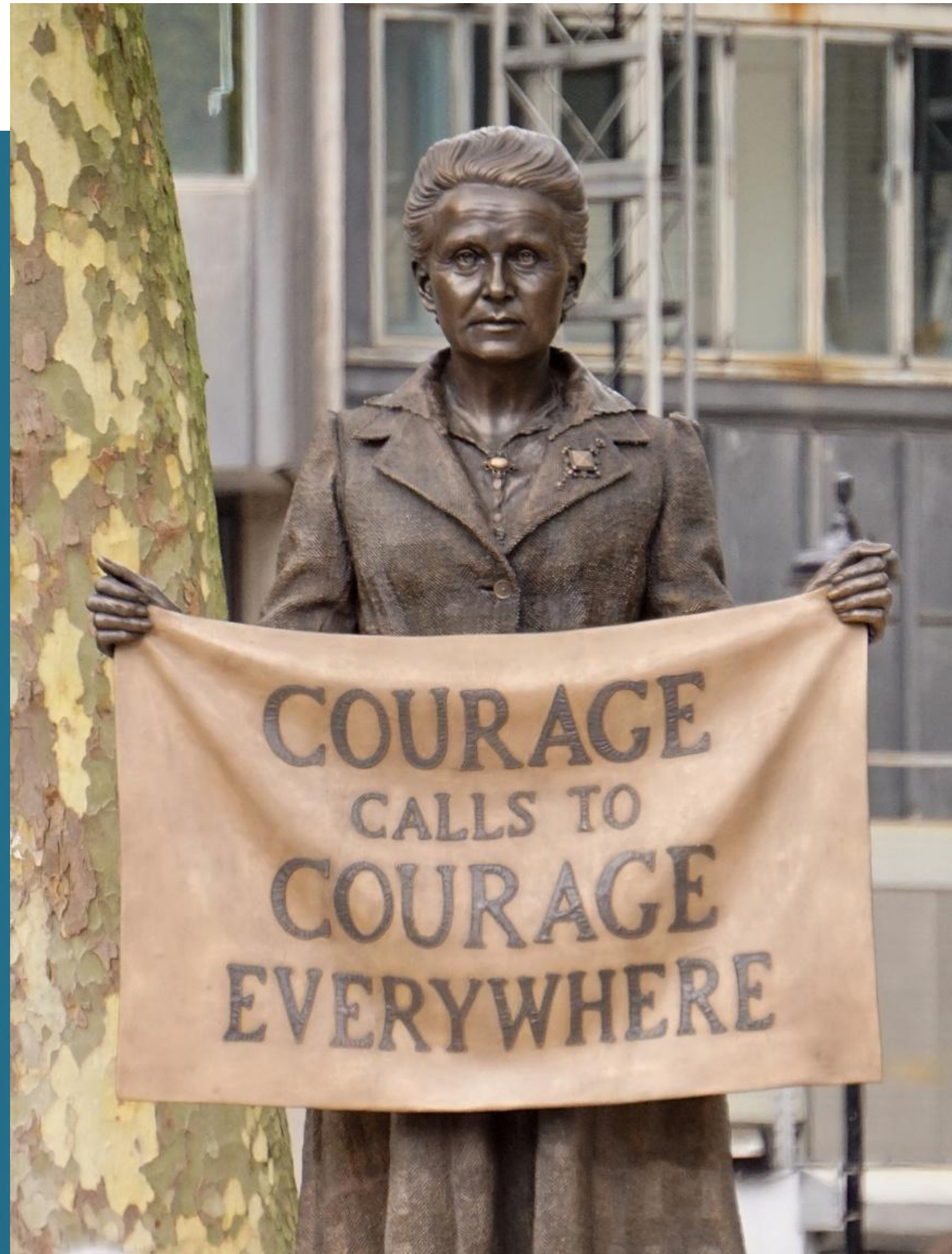
Coping isn't comfort

Energy efficiency as a deciding factor

Improve visibility of programmes and delivery

Strengthen how energy information is communicated and understood





**IT DOESN'T STOP HERE, WE WILL CONTINUE TO ENGAGE THROUGH  
OUR FOCUS GROUPS AND LISTENING EXERCISE.**



# THANK YOU

**WE ARE HERE TO SUPPORT YOU**  
**[Akshita@tpas.cymru](mailto:Akshita@tpas.cymru)**