



You matter | Ti'n cyfri

Rent Setting - 2nd Annual Survey: Tenant Insights

TPAS Cymru Report Launch—
October 2023

Your hosts today



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Tenant Pulse Overview: Report and Results



THE 2ND ANNUAL RENT SETTING CONSULTATION SURVEY

OCTOBER 2023
WWW.TPAS.CYMRU



Ariennir yn Rhannol gan
Lywodraeth Cymru
Part Funded by
Welsh Government



TENANT VOICE SPONSOR

What is 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.

LIVE OPEN SURVEYS - HAVE YOUR SAY

Survey

NEW: Tenant v's Landlord references


This short survey is for PRIVATE RENTERS only. It seeks to explore renters views on references and tests an idea on landlords also being required to provide references.

Take the Survey 

Survey

Value for Money

When you think about "value for money", what matters most to you? Complete this survey so that we can help landlords focus on the most important issues.

Take the Survey 

Survey


NEW: Communicating with your landlord and community

How do you usually get your news from your landlord? Tell us more about the ways you communicate with your landlord and community.

Survey

NEW: Bothered/Not Bothered: Net Zero Edition


At a recent Tenant Network, we raised some controversial questions to the tenants. Fill out this 2 minute survey to be involved in the conversation.

Take the Survey 

Survey

Benefits Issues


Do you claim any benefits? Have you ever had problems with them? Let us know by clicking here.

Take the Survey 

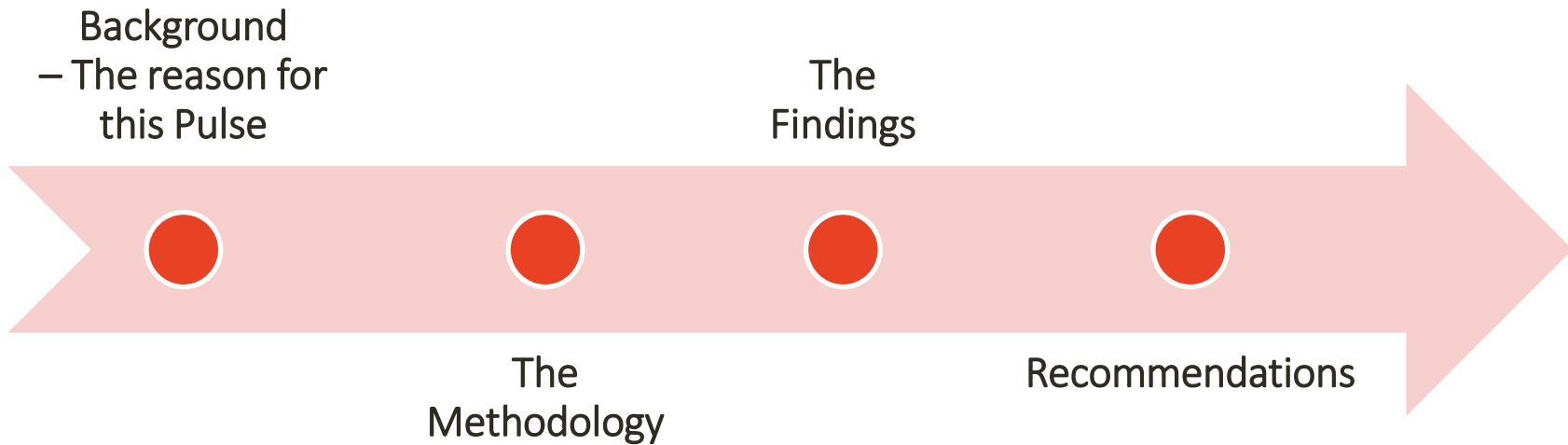
Survey

Anti-social Behaviour

Anti-social Behavior can have a serious impact on communities and individuals. Let us know your experiences, so that we can help make our communities safer.

Take the Survey 

What we'll look at ...



Background

Welsh Government requested a dedicated tenant pulse on rent setting last year

. Tenants were facing significant increases in all costs

We amended the survey to include service charges

The survey explored tenants' views on their increasing rents and if they knew the reasoning behind such increases.

Method

- 18 structured survey questions on QuestionPro platform
- Survey promotion

How do we promote it?

- Sent to Social Housing tenants who have signed up to Tenant Pulse.
- TPAS Cymru social media accounts, including Facebook, Instagram, X/Twitter, Mastodon and LinkedIn
- We undertook a paid media advertisement campaign on Facebook, to widen our reach.



Survey Promotion

Social Media Campaign



Yn galw ar holl denantiaid tai cymdeithasol Cymru!

Dweud eich dweud ar rent a thaliadau gwasanaeth yng Nghymru.

Rydym angen eich lleisiau ar hyn o bryd i wneud yn siŵr eich bod yn cael eich cynrychioli yn y penderfyniad hwn.

bit.ly/3OG3FBI

Translate post



Calling all social housing tenants!

Have your say on rent and service charges in Wales.

We need your voices right now to make sure you are represented in this decision.

It takes less than 5 minutes to complete.

bit.ly/3OG3FBI



"What tenants have to tell us about the rent they pay forms a core part of the advice to Ministers about the levels set."

Every tenants' voice matters and makes a difference.

Make sure to have your say in our rent and service charge survey.

bit.ly/3OG3FBI



Responses

881 Social Housing Tenants - All 22 Local Authority Areas
Last year - 353 responses

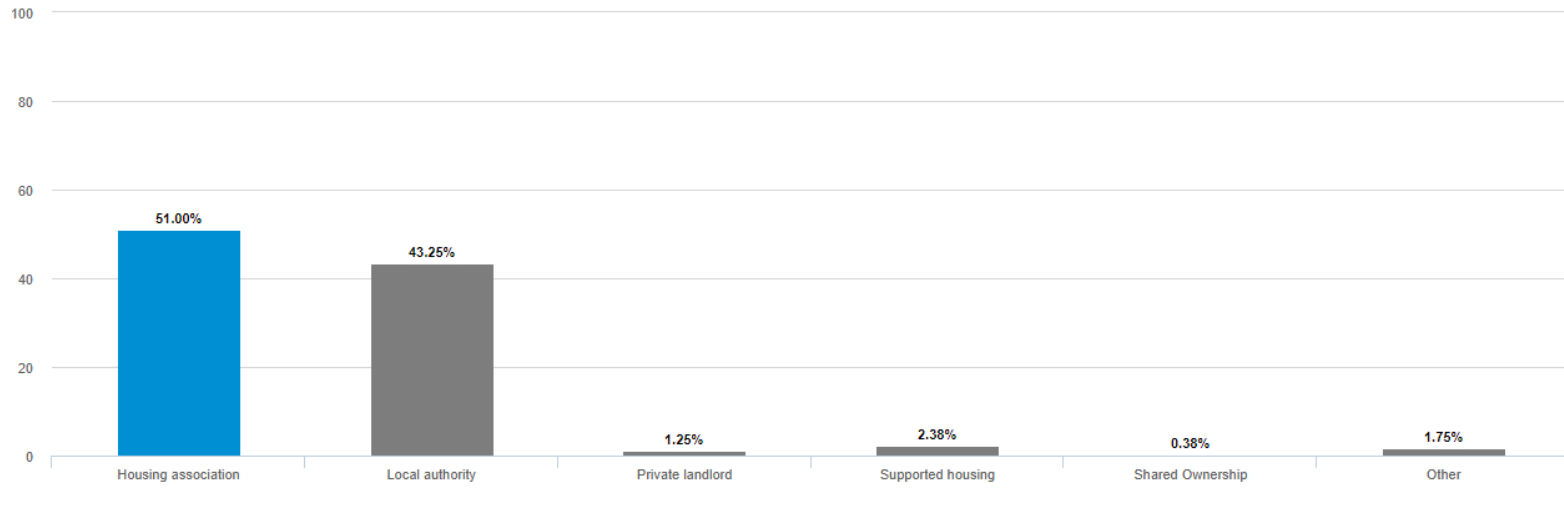
Highest Responding areas – all social tenants (highest first)	Lowest Responding areas – all tenants (lowest first)
Swansea	Ynys Mon
Vale of Glamorgan	Merthyr Tydfil
Cardiff	Torfaen
Wrexham	Denbighshire

Response differentiation



Highest Responding areas - Housing Association tenants	Highest Responding areas – Local Authority tenants
Swansea	Swansea
Cardiff	Vale of Glamorgan
Newport	Wrexham
4 th equal = Ceredigion / Gwynedd	Pembrokeshire

What type of housing

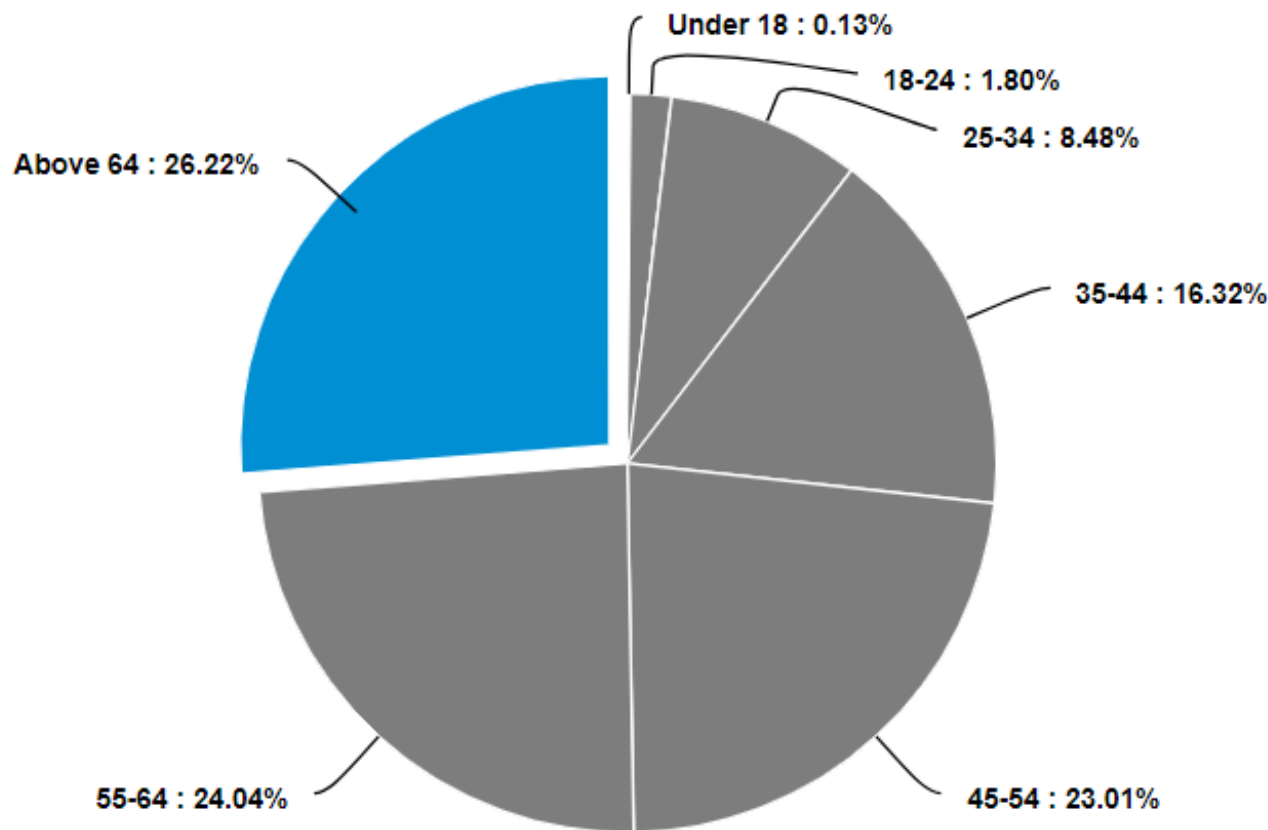


Of the **881** respondents:

- **51%** lived in a **housing association**.
- **43%** in **local authority** housing
- and the remaining **6%**, the majority were living in **supported housing**.



Age Groups



Last year, 43% of tenants were over 60, however this year we have had broad representation from each age group, with over a quarter of tenants being under the age of 44.

Underrepresented groups

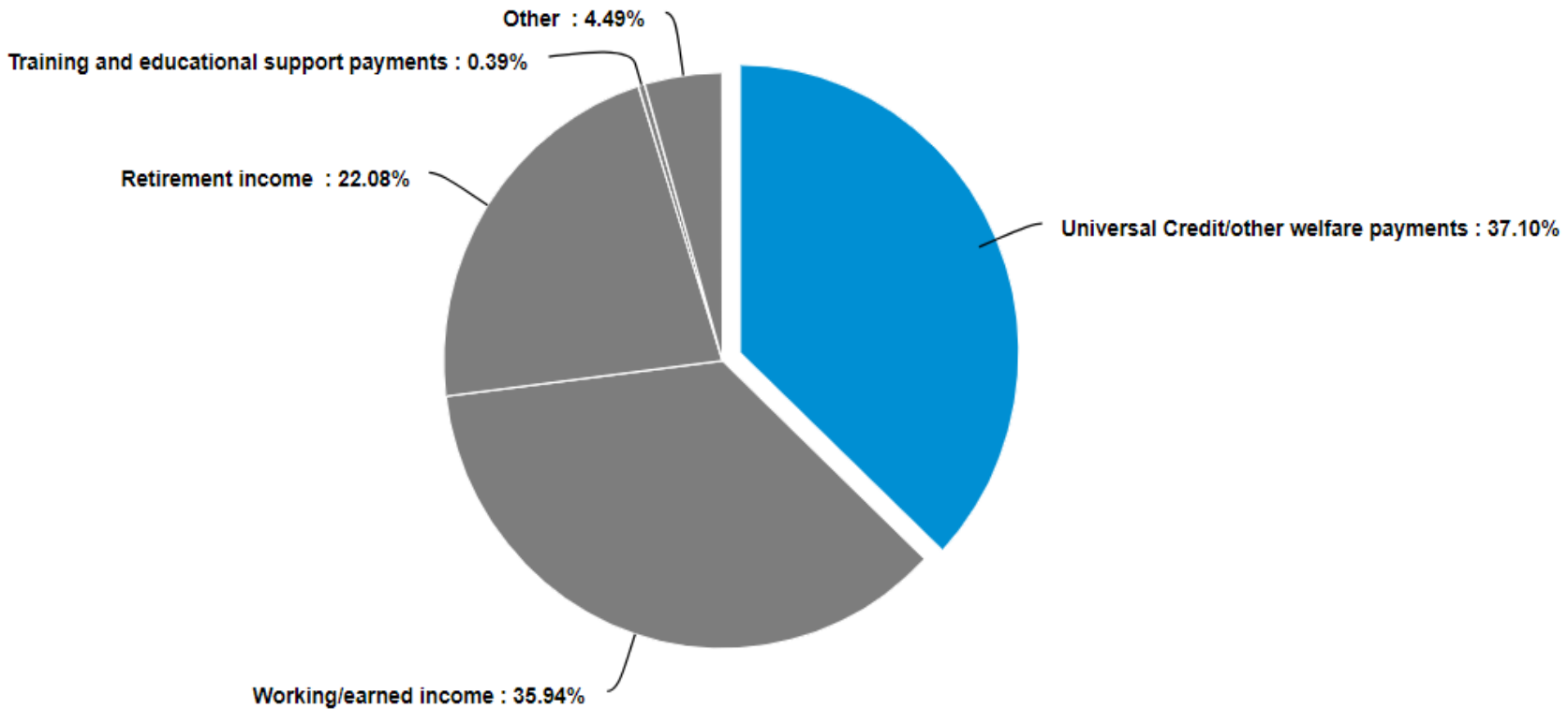
Across all respondents, 2.5% identified as have a Black, Asian, Minority Ethnic (BAME) background.

This is lower than the national Welsh average population (5%).



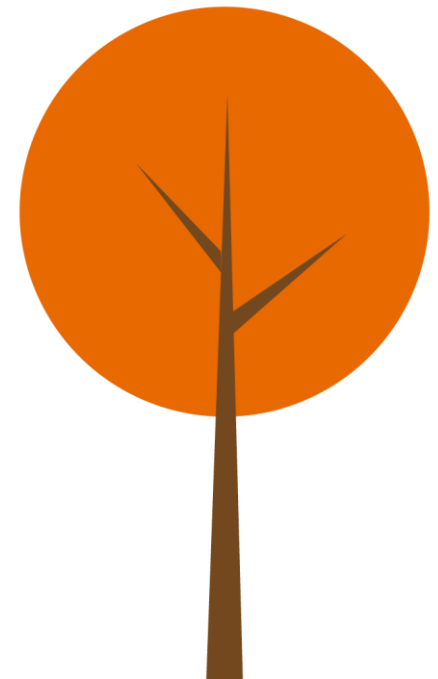
Nearly half the responders considered themselves to have a disability


Tenants main source of income



Income Variation based on age

Age	Work	UC	Total
25-34	45%	54%	99%
35-44	59%	38%	97%
45-54	36%	41%	99%
55-64	36%	41%	77%

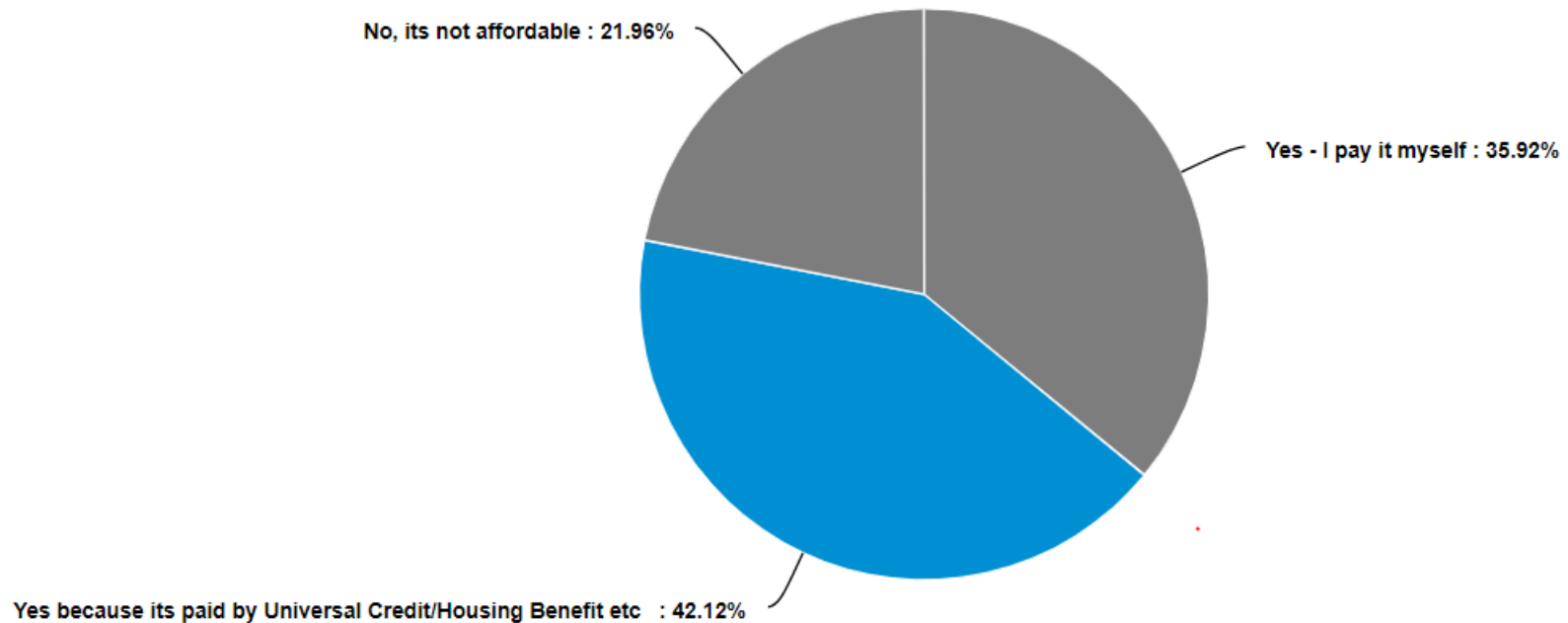




**Do tenants think
that their rents
are currently
affordable?**



The majority think it is affordable




Key observation:

22% of tenants felt their rent is unaffordable this year.

Last year, that was 31% in our poll (same time of year, approach etc)

A 9% reduction in the overall response of those viewing rent as unaffordable



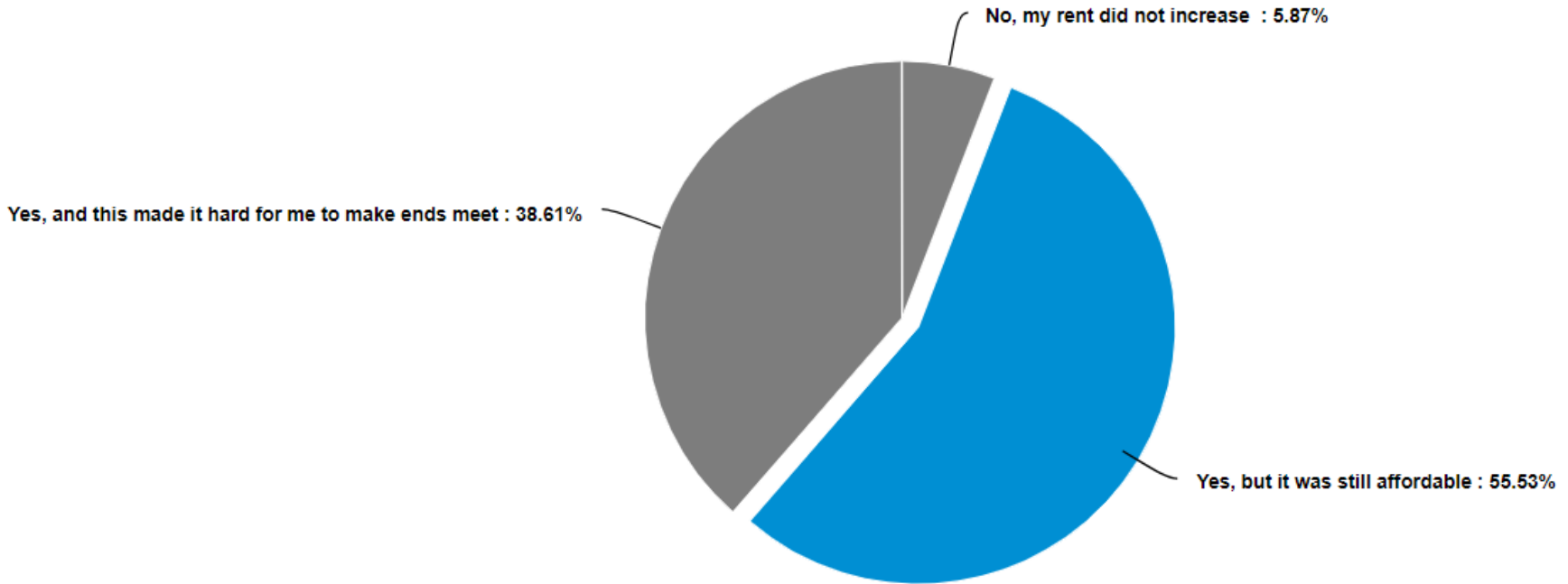
*'It's not that my rent is more affordable,
It's just everything else is so much more expensive. I have friends struggling to survive renting privately.
It makes me more grateful for what I have.*

Who is viewing their rents as affordable and unaffordable?

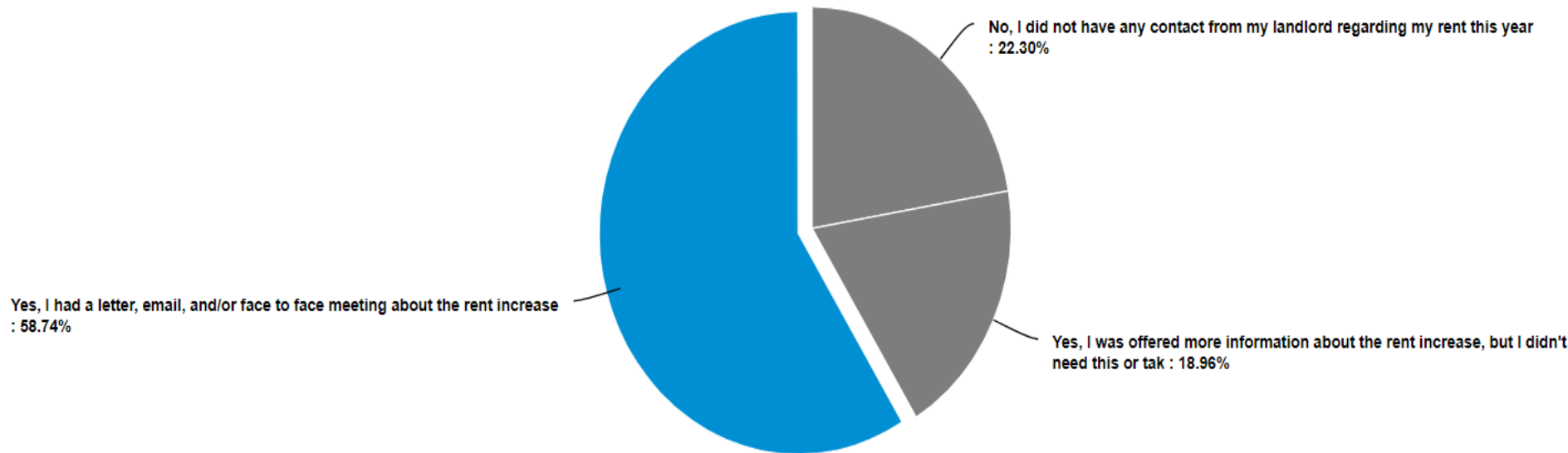


Age	I can pay my rent myself	Rent is covered by UC	Rent is Unaffordable	Rent is Unaffordable 2022
18-24	7%	80%	13%	20%
25-34	30%	53%	17%	20%
35-44	35%	36%	29%	38%
45-54	32%	35%	32%	38%
55-64	36%	46%	18%	32%
65+	42%	42%	15%	27%

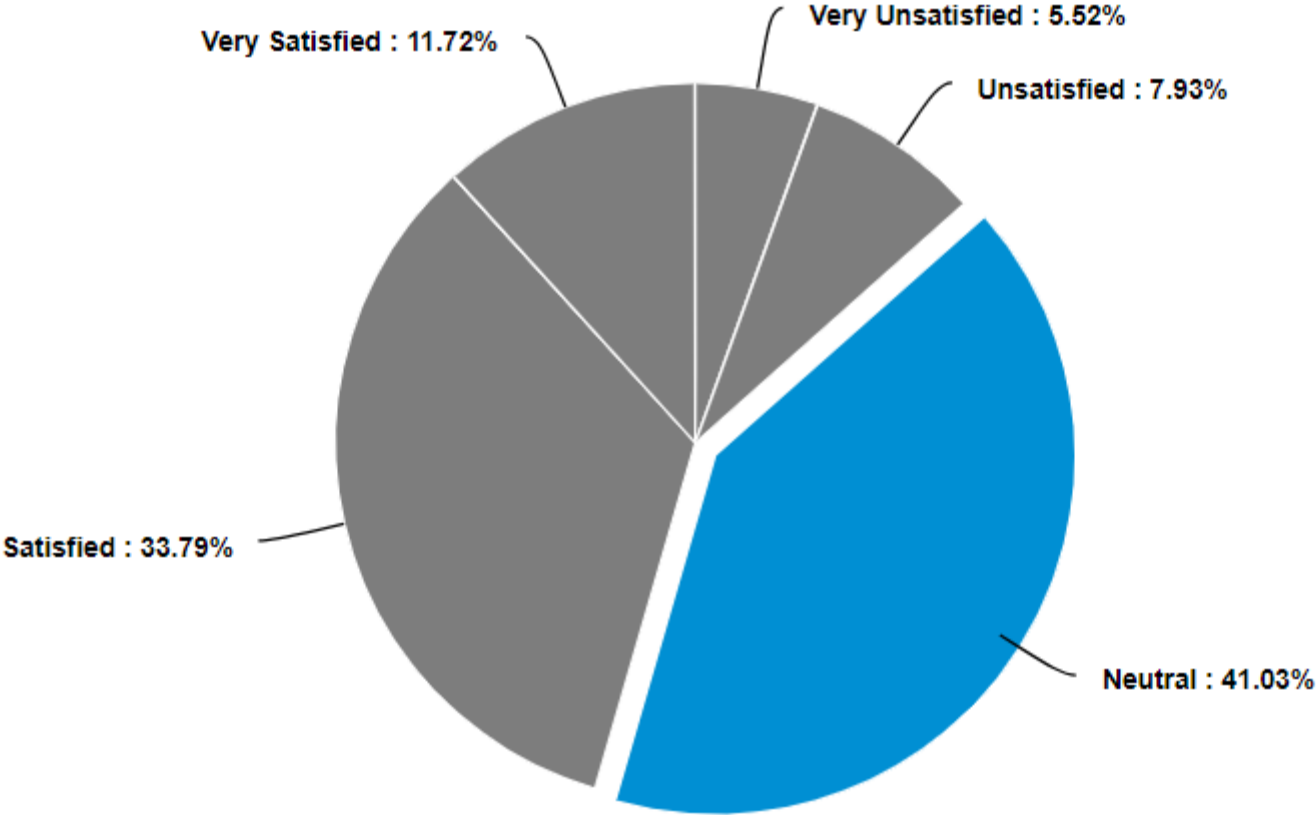
Did their rents increase?



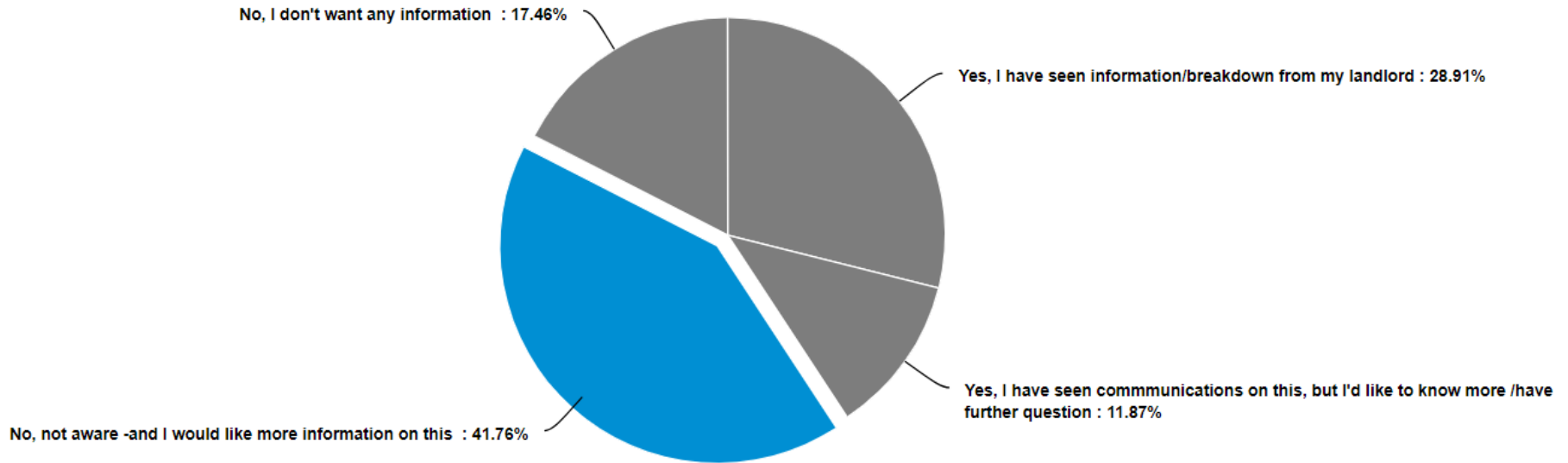
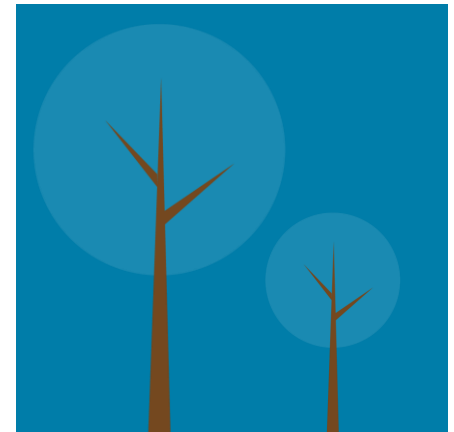
Did landlords discuss the increase?



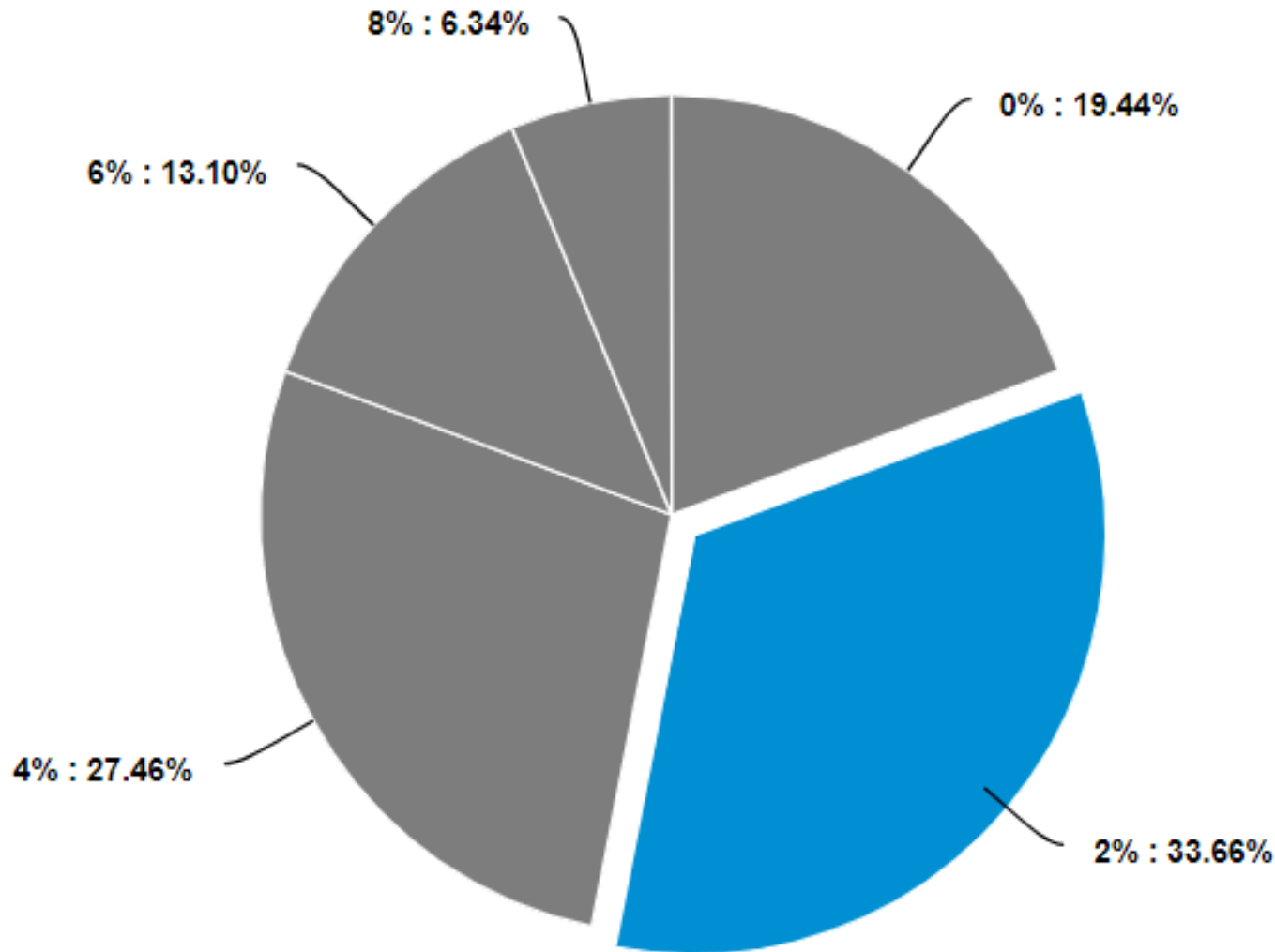
Tenant satisfaction with communications



Do tenants know what their rents are spent on



What tenants think their rent should increase by

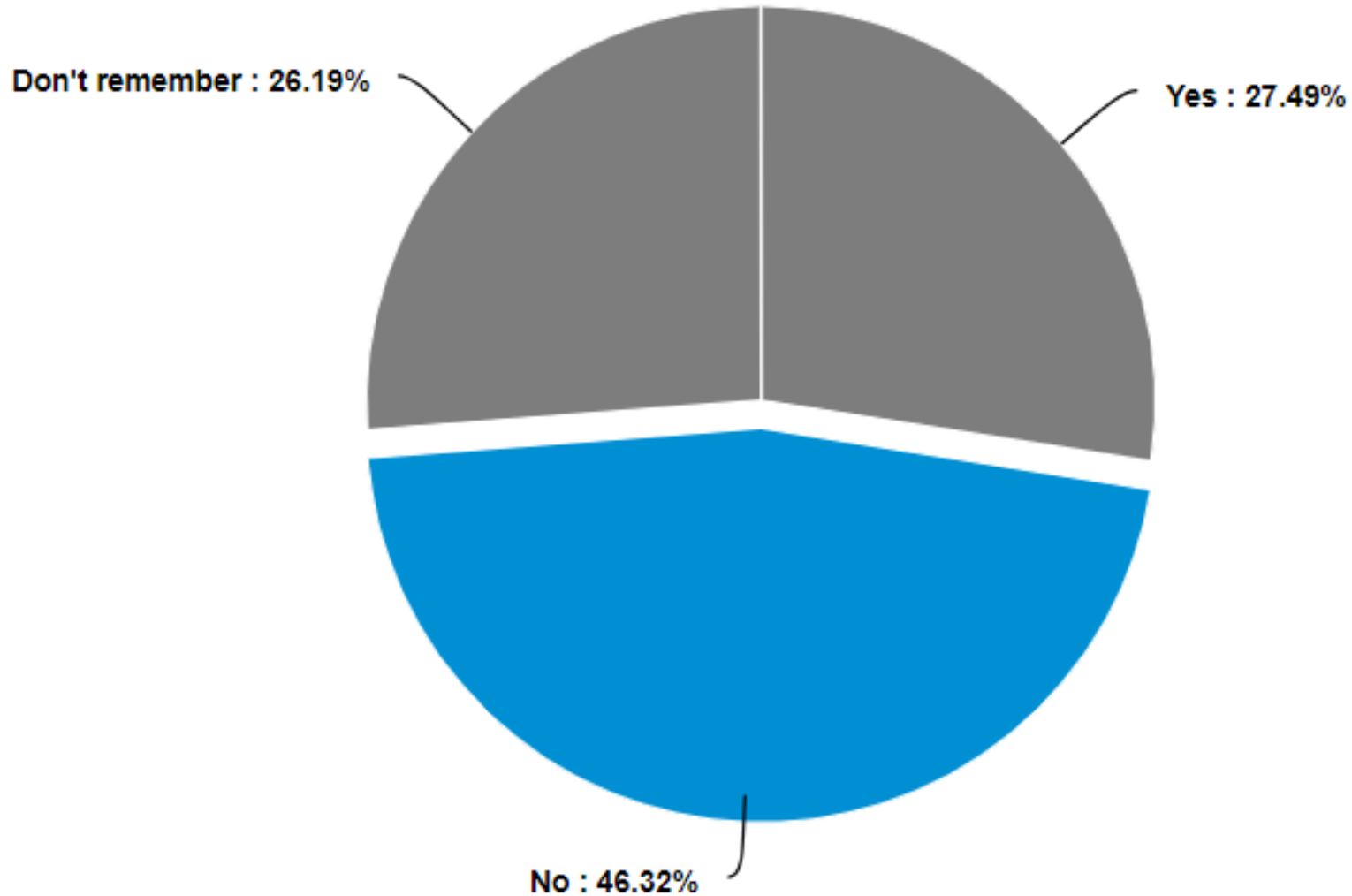


The 2022 findings comparison

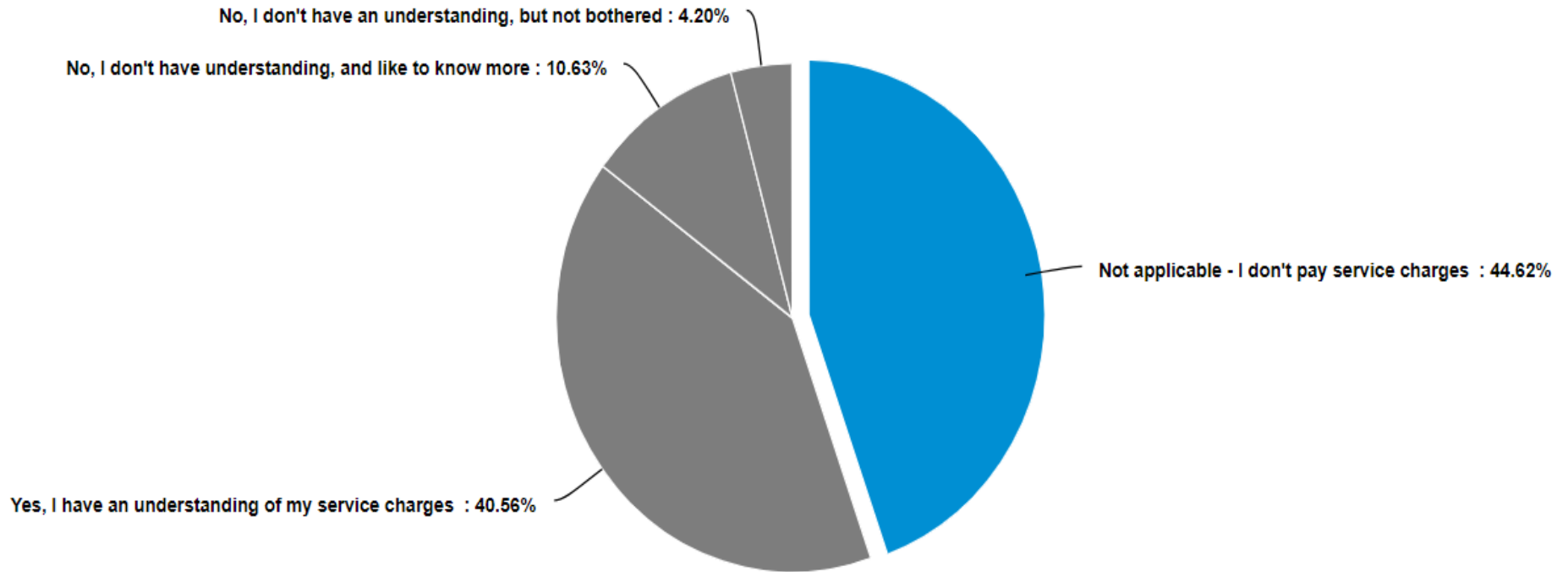
Although we didn't ask this question in last year's survey, we did ask about how tenants would feel about paying a 5% rent rise. The results from that survey highlighted that the only way tenants could afford such a rise would be if welfare benefits also increased, which, as we know, has not been the case. In addition to that, a significant proportion of tenants also stated that a 5% rise would be unaffordable.

Taking these findings into account, we predicted tenants would not be comfortable with rent rises being in line with inflation, as set in the original rent settlement.

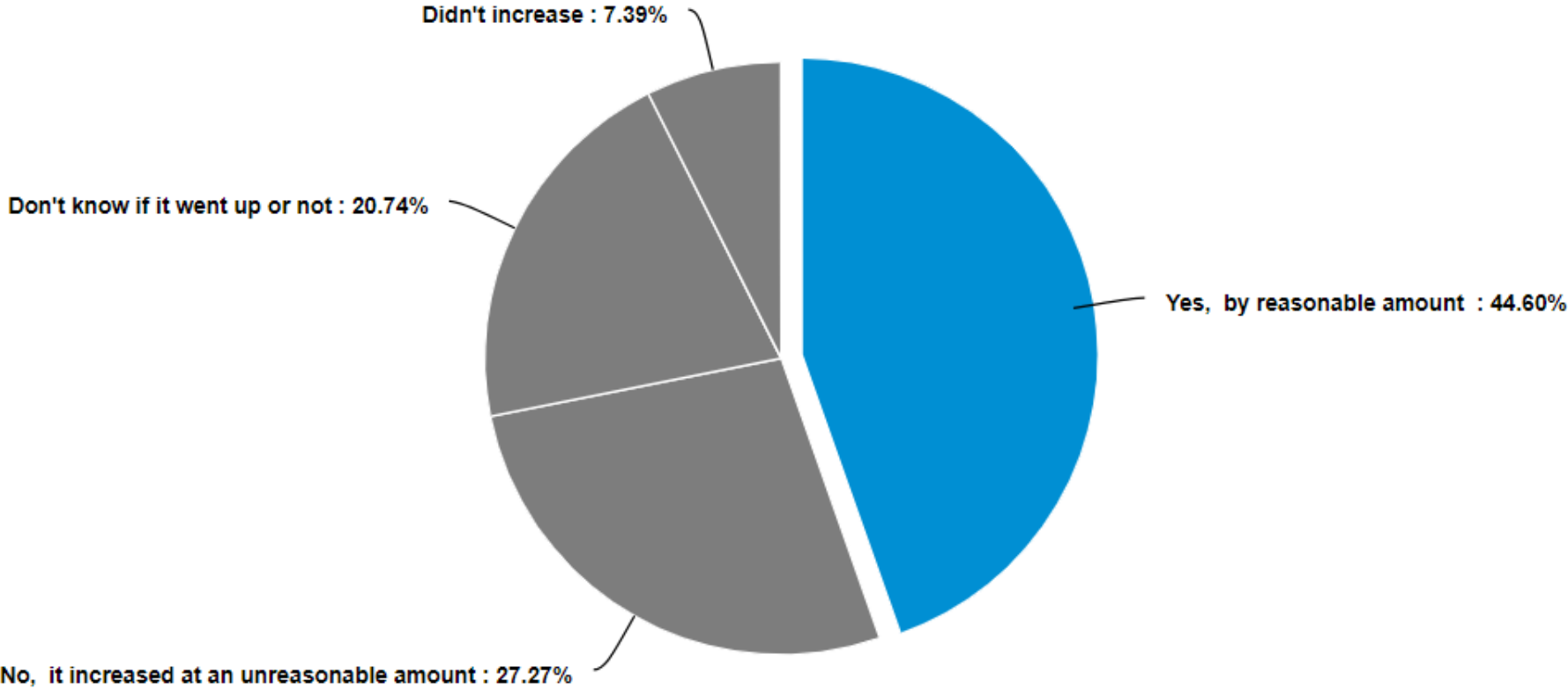
Were tenants in financial hardship supported?



And what about service charges?



Were they reasonable



What else do tenants think about their rents?

“I pay my rent each month, but it would seem the council struggle to do maintenance and upkeep of the property, including mould issues reported in January. Absolutely disgusting with the lack of care and communication the council deliver”

“Life in general is getting more expensive with everything going up like basic amenities, electricity, water, food, as well as transport and telecommunications, so increases in rent and services makes living hard for those who are on a fixed income”.

Our recommendations:



1. More work is needed in communicating and engaging tenants with rent and service charges during these challenging times.
2. To do that, the sector needs communication and engagement professions to be challenged and resourced go further than they have before, in reaching tenants to explain rent changes and how rent is used.
3. We need to continue to invest in support for those struggling particularly the self-payers (people working) who are in that middle period of working age 34-55. The sector needs better insight into their profiles and challenges, who else is reliant on them (like families) so that better targeting on support can take place.
4. Rent setting is a challenging subject; where rents may need to rise again to maintain services but the sector needs to show that its delivering on its promise of well-maintained affordable, warm homes.



Tenants who asked for a copy will be sent it.

Follow up user groups with WG

TPAS Cymru have formally replied to the consultation

Webpage with this report will go live at the end of this week



TENANT PULSE PRIZE DRAW WINNERS!

CONGRATULATIONS TO:

Katie - from Cardiff
Ellena - from Ynys Môn
Denfor - from Carmarthenshire

All receive
hampers

Time to
Update

dil
FOODS

ADEQUATE HOUSING AND FAIR RENTS: INSIGHT FROM PRIVATE RENTERS IN WALES

August 2023
www.tpas.cymru



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Any questions?