TPAS CYMRU
You matter | Ti'n cyfri

TENANT VOICE ON ENERGY EFFICIENCY & AFFORDABLE WARMTH

codi

Ariennir yn Rhannol gan Lywodraeth Cymru
Part Funded by Welsh Government

APRIL 2026
WWW.TPAS.CYMRU

TENANT VOICE SPONSOR

Contents

Chief Executive Foreword

Croeso and welcome to TPAS Cymru's sixth annual Tenant Survey on Affordable Warmth and Energy Efficiency.

Before I begin, I would like to extend a sincere thank you to all the tenants and renters who took the time to complete the survey. Your voice is vital, and TPAS Cymru is committed to ensuring that the time and effort you have given translates into meaningful impact.

On behalf of TPAS Cymru, I want to make that promise clearly: we will ensure your views are heard by policymakers.

This **annual** survey is designed to examine and track tenant views on energy-efficient homes and landlord communication. As the tenant engagement organisation for Wales, we believe this report provides decision-makers with valuable insight into what truly matters to tenants in the transition toward housing decarbonisation.

As of April 2026, energy prices had temporarily stabilised, with typical household bills falling by around £117 (7%) under the current price cap. However, this relief is expected to be short-lived, with forecasts pointing to renewed increases from July. This continued volatility reinforces the importance of this report in understanding how tenants experience energy costs, efficiency, and support in an uncertain energy landscape.

We received a strong response from across Wales, representing a wide range of housing situations, including tenants of housing associations, local authority housing, supported housing, and the private rented sector. The inclusion of private renters is particularly important, as it allows us to better understand both the shared challenges and distinct experiences across different tenures.

We hope that stakeholders across the housing sector will engage with this report, gain a fresh perspective on Net Zero, and recognise the importance of meaningfully involving tenants in this conversation.

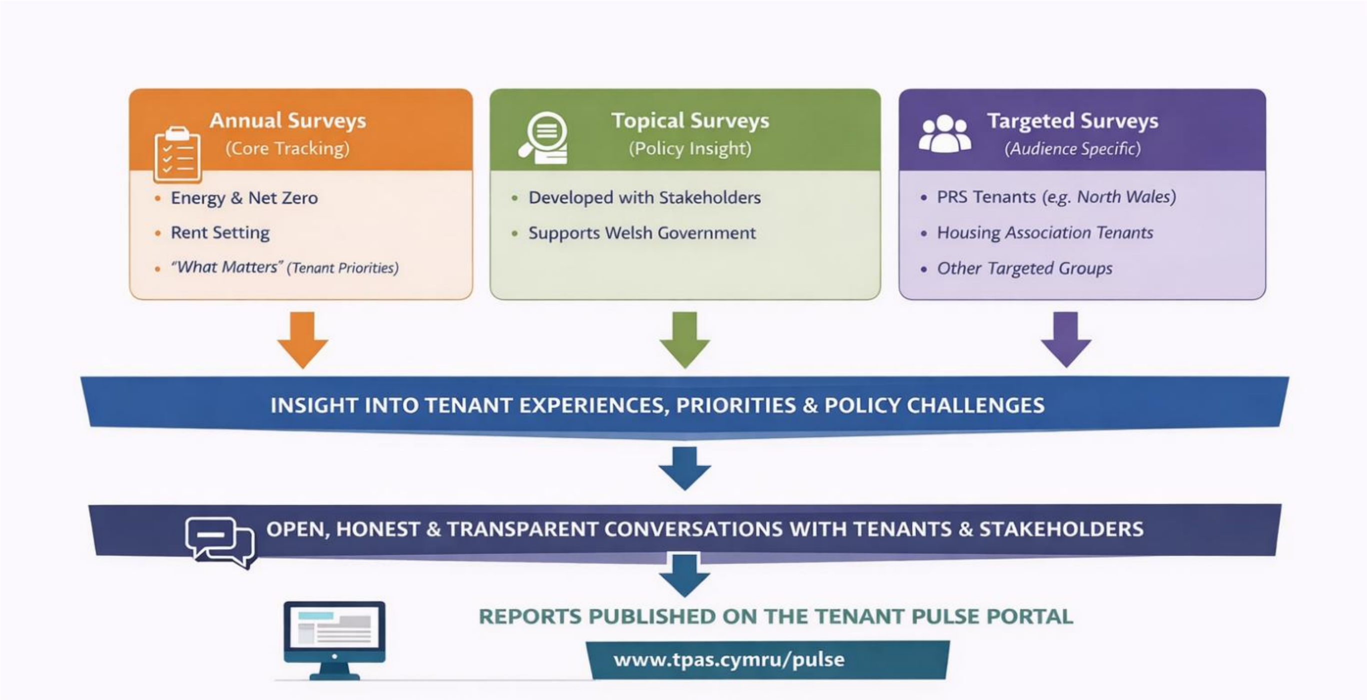
Finally, I would like to once again thank everyone who contributed to this survey. **Your voice matters.**

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:



Background and Introduction to this survey

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

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

"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."
- Tenant

Decarbonisation policies are transforming housing across Wales, with initiatives like the Optimised Retrofit Programme and Welsh Housing Quality Standard aiming to improve energy efficiency. However, for tenants, the key question is: Are these changes making a real difference in their daily lives?

This report brings tenant voices to the forefront, exploring their experiences and concerns across four key areas:

1. **Heating Affordability: The Cost of Staying Warm**: Are tenants able to heat their homes to a level that meets their needs?
2. **Attitudes and Perceptions: EPC, Smart Meters and Tariffs**: How well do tenants understand energy efficiency, and does this shape their decisions and behaviour?
3. **Looking Ahead: Information and Support**: How do tenants want to receive information and engage with energy efficiency and sustainability?
4. **Different Pathways: Social Housing and the PRS**: How do experiences differ across tenures, including home assessments, landlord communication, and the role of EPC in rental decisions?

By focusing on tenant perspectives, this report highlights what tenants are experiencing in practice, where gaps remain, and what needs to change to ensure energy improvements work for the people living in these homes

Author: Akshita Lakhiwal

Supported by: David Wilton & Iona Robertson

Key Findings

Heating costs remain difficult for most tenants to manage
Only **23% of tenants say their heating is affordable**, with the majority either struggling or only sometimes able to afford it. A similar pattern is seen in the ability to heat homes comfortably.

Behavioural adaptation to stay warm is widespread, with clear age differences
Most tenants rely on alternative methods such as extra clothing, hot water bottles, and electric blankets, while some limit heating use or heat only part of their home. Older tenants are more likely to use alternative methods such as blankets, hot water bottles, and electric blankets, and to reduce heating use, while younger tenants report lower use of these approaches. Lots of evidence of under-heating.

Awareness of EPC ratings remains low and uneven
EPC (a rating that shows how energy efficient a home is) is one measure of energy affordability, but only a minority of tenants know their rating. Even where awareness exists, there is often confusion about what it means or whether it reflects the true condition of the home.

Smart meter uptake is relatively high, but wider energy engagement remains limited

Most tenants report having a smart meter, while non-adoption reflects trust concerns, practical barriers, and lack of awareness. At the same time, relatively few tenants report switching their energy tariff. This is particularly evident among younger tenants, who show the highest awareness of EPC ratings, are the least likely to switch tariffs.

Delivery and awareness of home energy assessments in social housing is uneven
Only around a quarter of tenants' report having had a home assessment under the Welsh Housing Quality Standard, with many either not having had one or being unaware of the programme.

In the private rented sector, energy efficiency has limited influence on choosing a home but may matter more over time
EPC ratings play a limited role when choosing a property, but more tenants say they would stay longer in an energy-efficient home.

This reflects limited choice at the point of renting, where tenants are not always able to prioritise energy efficiency. This is important as EPC standards in the private rented sector continue to improve.

Areas for ACTION

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

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

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

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

Improve visibility and tenant awareness of programmes such as Welsh Housing Quality Standard
Low recall of home energy assessments indicates that programmes may not always be visible or clearly understood by tenants, even where activity has taken place.

How the survey was promoted:

As per our promotion strategy and agreement with tenants who have signed up for Tenant Pulse, the survey was sent to tenants who have signed up to Tenant Pulse (our Pulse 'members').

- The survey was also guided and supported by our **Tenant Pulse Advisory Group (TPAG).**

- Landlords from across Wales supported this survey by promoting it to their tenants via social media, digital comms, and flyers. We have found that this support creates some noticeable differences in response rates per area depending on landlord engagement and tenant demographics. We're grateful for this landlord and community support.

- This survey was also promoted via the TPAS Cymru social media channels. Alongside digital promotion, we also undertook in-person outreach distributing printed flyers and visiting community centres across Cardiff, to support both offline and online participation and reach tenants less likely to engage digitally.

- As in our previous surveys, we conducted a paid social media advertisement campaign on Meta (across Instagram and Facebook) platforms. This method has a proven track record of supporting TPAS Cymru in accessing tenant voices we would not normally hear – such as younger tenants or private renters.

- From our past experiences with Tenant Pulse and the data we gather from these surveys, we can see that voices that Tenant Pulse captures are those who are not typically engaged in tenant participation or involvement activities. Therefore, this survey showcases new tenant voices to the sector.

- Our paid advertisement campaign on Meta: We served 238,000 adverts to 140,000 people in Wales. The campaign used a mix of targeted interests/characteristics and a look-a-like tool.

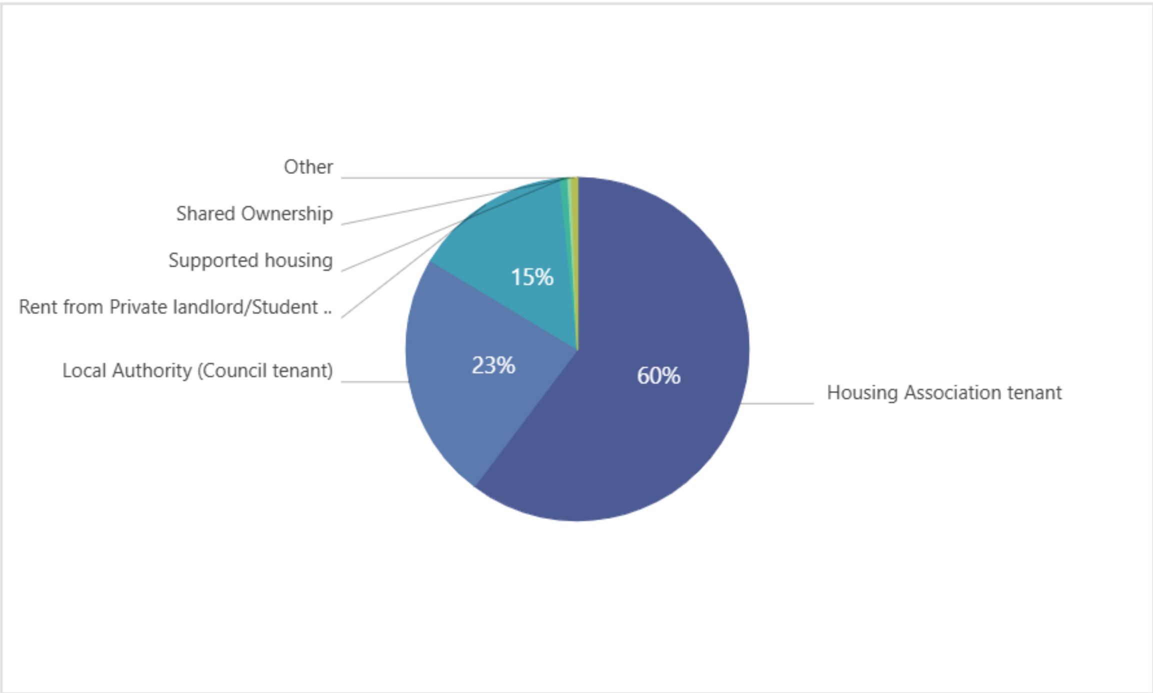
Demographics of respondents

Under the TPAS Cymru Tenant Pulse branding, TPAS Cymru conducted a survey in January 2026 using the Tenant Pulse platform. The survey included 18 questions, gathering insights from tenants across Wales on their views and behaviours related to Net Zero and energy efficiency, as well as their concerns about transitioning from gas and the future rental landscape.

Response summary

A total of 565 tenant respondents.

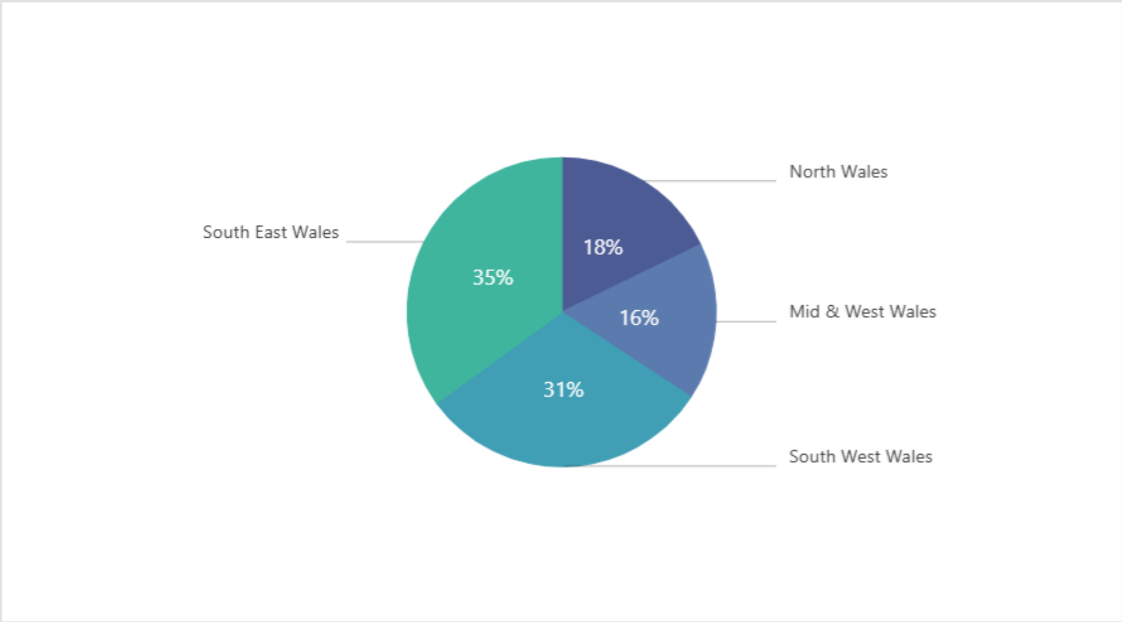
What type of tenant/renter are you?



In 2026, Housing Association tenants remained the largest respondent group (60%).

- Representation from Local Authority tenants increased slightly to 23%,
- While responses from the Private Rented Sector (PRS) rose more noticeably to 15%, up by 3% from the previous year. (2025)

Which part of Wales do you live in? (if you live outside Wales please tick other)



As in previous surveys, and broadly reflecting the distribution of housing across Wales, the highest number of responses in 2026 came from Southeast Wales (35%), followed by Southwest Wales (30%). North Wales accounted for 18% of responses, while Mid & West Wales made up 17%.

This pattern is broadly similar to 2025, with Southeast and Southwest Wales continuing to make up the largest share of responses. However, there is a noticeable increase in responses from Southwest Wales, rising by around 4% compared to the previous year.

Respondents self-identified their region, as no boundary guidelines were provided.

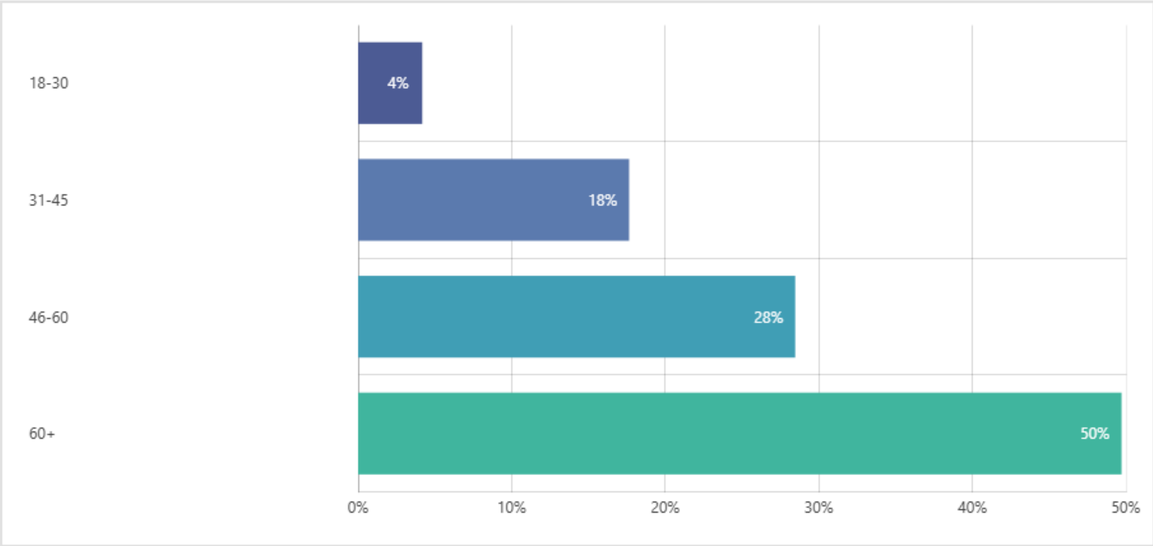
Private Renters Breakdown

PRS respondents were broadly split between renting directly from landlords (53%) and via letting agents (47%), with other arrangements negligible.

Age Groups

The age breakdown of respondents continues to show a strong representation from older demographics. In 2026, those aged 60+ made up 50% of responses, followed by the 46–60 group at 28%. Those aged 31 - 45 accounted for 18%, while the 18 - 30 group represented a much smaller share at 4%.

What age group are you a part of?



Age breakdown in the **private rental sector** (Chart below)

In 2026, only a very small proportion of social housing respondents were aged 18 - 30, compared to around 18% in the PRS.

The PRS also shows a more even spread across age groups, whereas social housing responses remain more concentrated among older tenants, particularly those aged 60+.

However, compared to 2025, there has been a noticeable shift within the PRS itself. The proportion of respondents aged 60+ increased significantly, from around 12% last year to 35% in 2026, suggesting a broadening of engagement among older private renters.

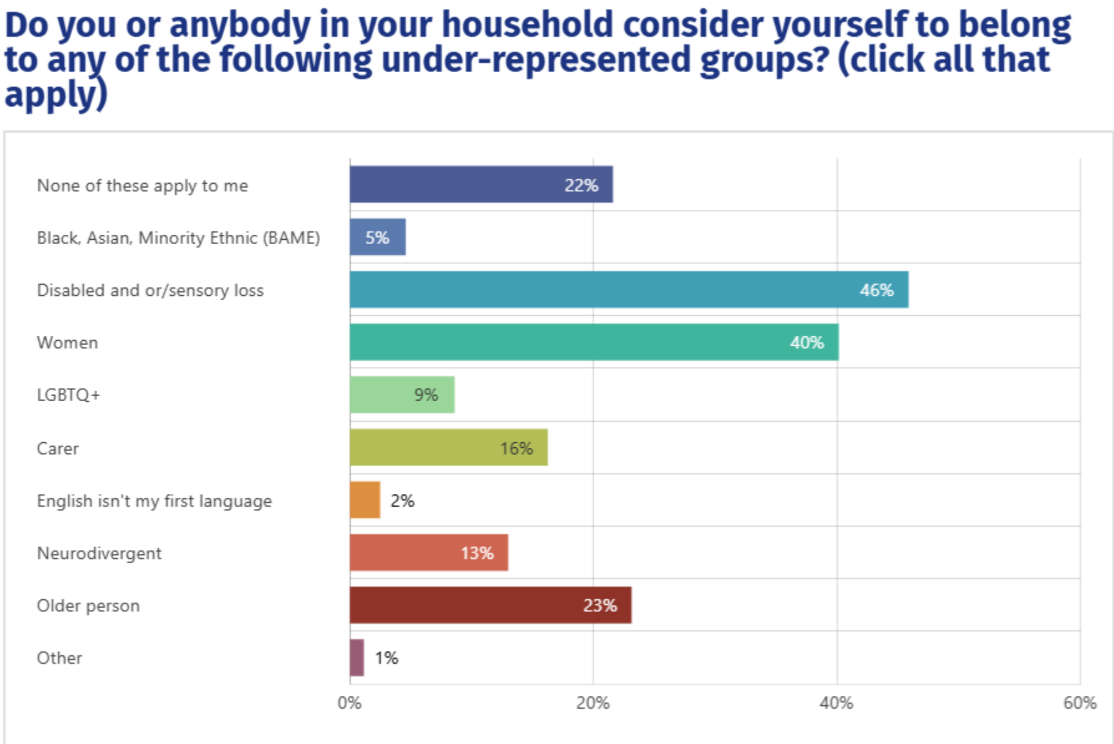
This may partly reflect differences in how the survey was promoted this year, including the use of Meta advertising and posts on platforms such as Next door, which may have reached more older audiences.

We aim to continue increasing participation from younger tenants, as their perspectives provide valuable insights for future generations.

Underrepresented Groups

We asked respondents if they considered themselves or anyone in their household as belonging to any of these underrepresented groups:

(Note: respondents could select more than one)



Overall, 5% of respondents identified as being from a Black, Asian or Minority Ethnic (BAME) background, an increase of 1% compared to the 2025 Net Zero Survey and a 2% increase compared to the Annual Tenant Pulse 2025 survey, indicating a small but positive improvement in representation.

The highest responding group in this survey was Disabled and or/sensory loss tenants, making up 46% of respondents. (higher than 33% in 2025)

A new category was also introduced this year to capture gender, with women representing 40% of respondents.

By Tenure

- Respondents identifying as **d/Deaf or disabled are more concentrated in social housing**, reflecting higher levels of need.
- The **PRS shows a more diverse profile**, with higher representation among:
  - **Women (51%)**
  - **LGBTQ+ respondents (30%)**
  - **Neurodivergent individuals (23%)**
  - **BAME respondents (21%)**

REGIONAL LEVEL DIFFERENCES:

In Southwest Wales in particular, 44% of PRS respondents identified as being from a BAME background, a markedly higher proportion than in other regions.

Overall, these patterns suggest that while social housing continues to capture higher levels of need, the PRS reflects a broader and more diverse mix of tenant experiences, with some regional variations in how different groups are represented.

OTHER

Responses captured through the dynamic comment box also highlight a wider range of backgrounds and experiences not fully reflected in the predefined categories.

These included respondents identifying with different language backgrounds (e.g., Arabic, Hindi, Polish, Turkish, and Welsh/Cymraeg), as well as references to long-term health conditions, invisible disabilities, and other personal circumstances such as being a single parent.

Section 1 - Heating Affordability: The Cost of Staying Warm

Every tenant deserves a home that is warm and comfortable for their needs. However, high energy costs continue to make this difficult for many households across Wales.

As of April 2026, prices have stabilised and energy bills will fall by £117, or 7% for a typical household on electricity and gas and paying by direct debit. While this price cap currently protects electricity and gas customers from price shocks caused by the US-Israel conflict with Iran, prices are forecast to sharply rise again in July.

Additionally, recent estimates suggest that around **25% of households in Wales (approximately 340,000 homes)** are living in fuel poverty, meaning they must spend more than 10% of their income on energy to keep their homes adequately heated.

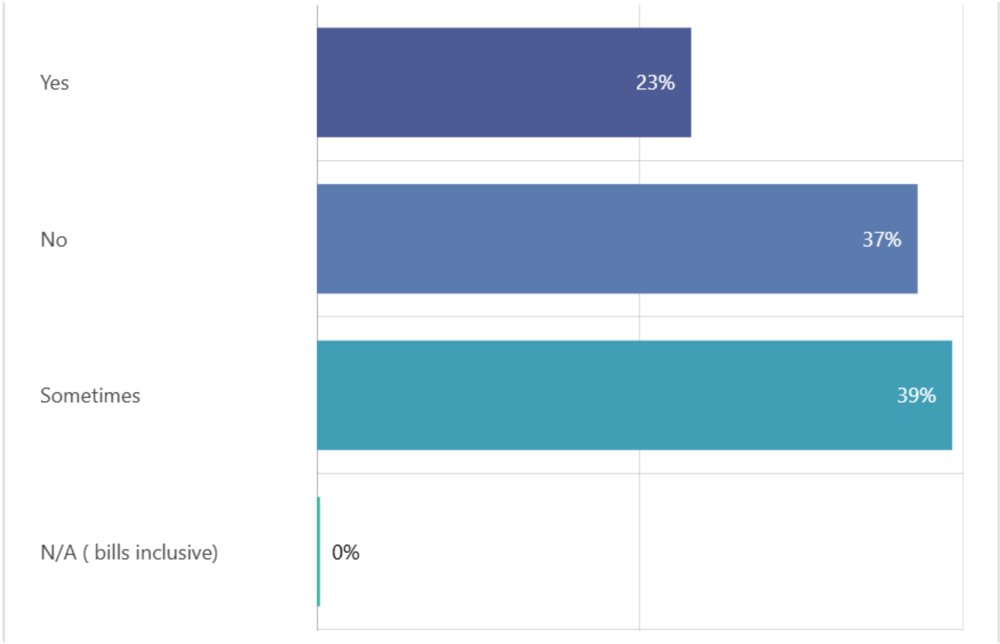
The impact is particularly severe for lower-income households, with over **80% of low-income households affected**, and a smaller proportion experiencing severe fuel poverty.

Heating costs continue to place a significant strain on tenants' budgets, particularly for those living in less energy-efficient homes or in the Private Rented Sector, where fuel poverty rates are higher than in other tenures. This not only affects financial stability but also has wider implications for health and well-being, especially during colder months.

To better understand this issue, we asked tenants about the affordability of their heating costs.

Q. Are your heating and energy costs affordable for you?

- Only 23% said their heating costs were **affordable.**
- 39% said they were sometimes affordable, while 37% said they were not.



When we look in more detail:

Age Groups
When we look in more detail, a clear pattern emerges across age groups in 2026. Unlike last year, where differences in affordability were more clearly defined, this year's results show a more complex picture, with many tenants reporting that they can only *sometimes* afford their heating.

Age 31 - 45:
This group appears to be the most affected.

- **49 % reported that they cannot afford heating costs**, with a further **39% saying they can only sometimes afford them**, meaning nearly **88% are experiencing some level of difficulty**.
- Social housing tenants are less likely to report being able to afford heating (**10%**) compared to those in the PRS (**21%**).

Age 46 - 60:
A similar level of pressure is seen in this group.

- **44% of social housing tenants** and **47% of PRS tenants** said that they cannot afford heating. A further **39% of social housing tenants** and **41% of PRS tenants** say they can only sometimes afford it.
- This suggests that financial strain is widespread and consistent across tenures.

Age 18 - 30:

- Social housing tenants report higher levels of unaffordability (**50%**), compared to **18% in the PRS**, where a larger proportion (**46%**) report being able to afford heating.

- However, **36% in the PRS report only sometimes being able to afford heating**, indicating ongoing instability.

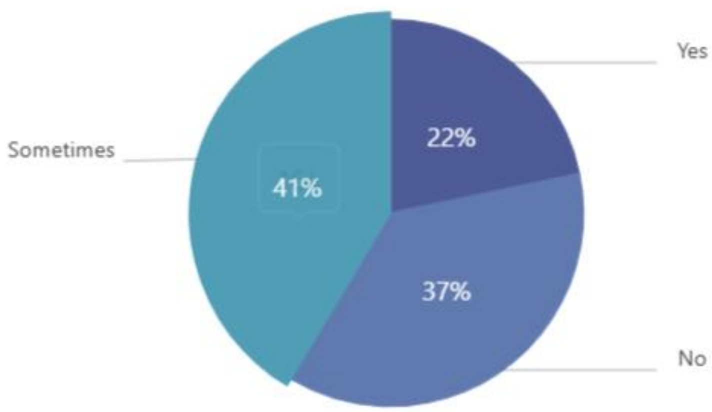
Age 60+:
Affordability appears somewhat more balanced in this group.
- In social housing, **29% report being able to afford heating**, while **29% cannot** and **42% report only sometimes being able to afford it**.
- In the PRS, **36% report being able to afford heating**, with **39% still report unaffordability**.

Takeaway

- While 2025 showed clearer differences between age groups, the 2026 data shows that financial pressure is high across all working-age groups, particularly among those **aged 31 - 45 and 46 - 60.**
- These groups consistently report the highest levels of unaffordability and "sometimes" responses, indicating ongoing difficulty in managing heating costs.
- Across all age groups, the high proportion of "sometimes" responses shows that many tenants are not consistently able to afford heating but are instead managing fluctuating costs month to month.

Underrepresented Groups - Black and Minority Ethnic Renters

Heating affordability remains a widespread challenge, with most respondents including those from underrepresented groups and across tenures, reporting they cannot afford it or can only sometimes afford it, reflecting wider housing inequalities where some groups are more likely to struggle with heating costs and spend a greater share of income on housing.



Regional Comparison

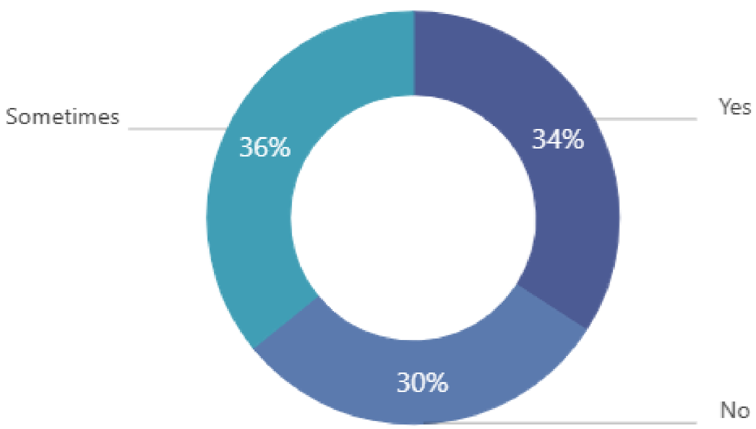
There are clear regional differences in how tenants experience heating affordability across Wales.

- Mid & West Wales reports the highest levels of difficulty, with 43% of respondents saying they cannot afford their heating costs, followed closely by Southwest Wales (41%).
- North Wales reports a lower proportion of respondents who cannot afford heating (31%) but has the highest share of tenants who say they can only sometimes afford it (44%), suggesting many households are managing costs from month to month.
- Southeast Wales shows comparatively lower levels of pressure, with 34% reporting that they cannot afford heating and 36% saying they can only sometimes afford it.

Recent updates to the energy price cap mean that household energy costs remain high despite some stabilisation. Standing charges also continue to be a concern, particularly in **North Wales**, where energy costs remain among the highest in Great Britain. This may help explain why many tenants in North Wales report difficulty managing heating costs.

Q. Are you able to heat your home to a temperature that meets your needs?

While heating affordability is a key concern for all tenants, some need to maintain specific temperatures due to medical reasons, children, or underlying health conditions. To better understand tenants' comfort levels, we asked them whether they are able to heat that meet their needs.



- Overall, responses are **fairly evenly split**, with **34% saying they can heat their home to a comfortable level**, **30% saying they cannot**, and **36% saying only sometimes**.
- This suggests that many tenants are **not consistently able to maintain a comfortable temperature**, even if they can do so occasionally.

By Tenure

Differences between tenures are **small but noticeable**:

- **PRS tenants are slightly more likely to say they can heat their home** (**32% vs 35% in social housing**)
- **Social housing tenants are slightly more likely to say they cannot** (**31% vs 28% in PRS**)

Underrepresented Groups

Among underrepresented groups:

  - **33% can heat their home**
  - **30% cannot**
  - **38% can only sometimes**

This group shows a **slightly higher reliance on "sometimes"**, again pointing to **inconsistent ability to stay warm**.

By Age Group

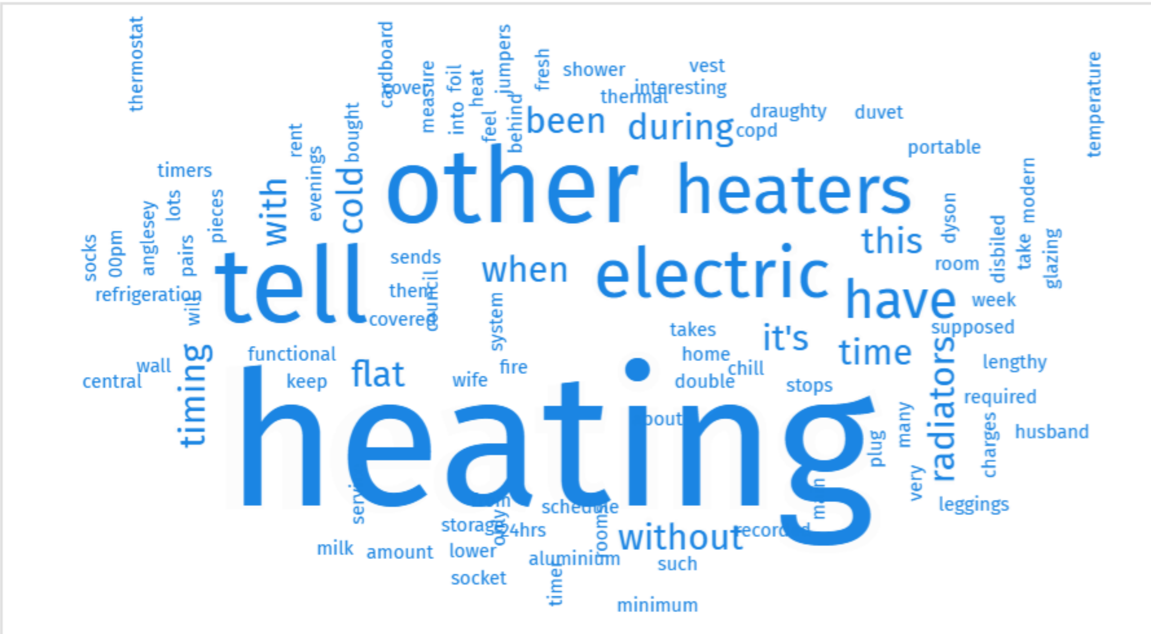
- **18 - 30:**
  - Highest proportion able to heat their home (**57%**)
  - Lowest "sometimes" (**19%**)
  - Younger tenants appear **more able to maintain comfort**, compared to other groups.
- **31 - 45 and 46 - 60:**
  - Lower "yes" (29–30%)
  - Higher "sometimes" (34–36%)
  - These groups show **more mixed experiences**, with many not consistently able to maintain temperature.
- **60+:**
  - Slightly higher "yes" (**37%**)
  - But also, high "sometimes" (**37%**)
  - Older tenants appear **somewhat more able**, but still face **ongoing difficulty**

Key Insight

- Across all groups, the **"sometimes" response is consistently high**, showing that: many tenants are **not always able to keep their homes at a comfortable temperature**, even if they can do so at times.

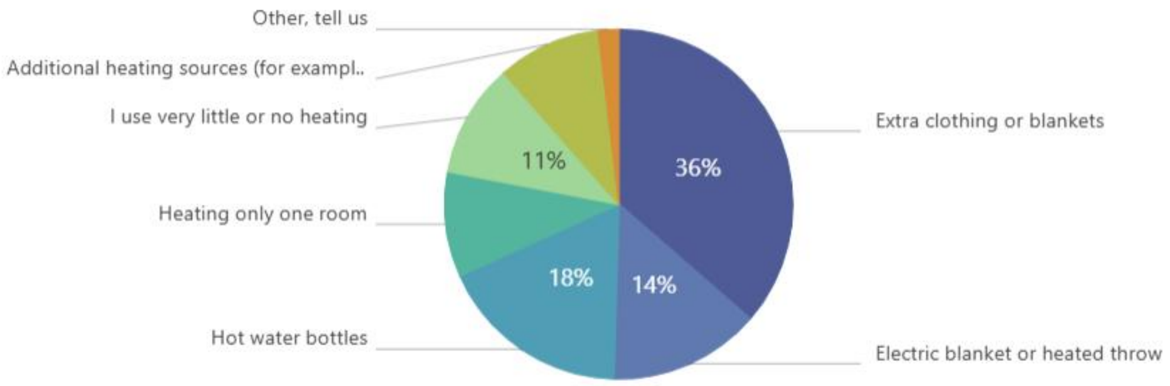
Q. Do you use any of the following to keep yourself warm? (Select all that apply)

Heating affordability is only part of the picture. For many tenants, staying warm involves making daily adjustments. Tenants are having to find alternative ways to stay warm. We asked what people are doing in practice to manage this.



Key Findings

- The most common approach across all respondents is **using extra clothing or blankets**, with **86% selecting this option**.
- A significant proportion of tenants are also using **hot water bottles (42%)** and **electric blankets or heated throws (34%)**, showing reliance on **targeted heating rather than heating the whole home**.
- Around **1 in 4 respondents (24%) say they use very little or no heating**, which is a notable finding and indicates that some households may be limiting heating use altogether.
- **20% report heating only one room**, suggesting that many tenants are managing costs by **restricting heating to specific areas of the home**.



Use of Very Little or No Heating

- Around **1 in 4 respondents (24%) report using very little or no heating**, making this one of the most significant coping strategies identified in the survey.
- This pattern is **seen across both social housing and the PRS**, with similar levels reported in each, suggesting that reducing heating use is **not limited to one housing type**.
- A similar trend is also seen among underrepresented groups, indicating that **cutting back on heating is a common response across different groups of tenants**.

This suggests that many tenants are **not increasing heating use despite need but instead reducing it to manage costs**.

By Age Group

- **Those aged 60+ are the most likely to use a range of ways to keep warm**, including:
  - **Extra clothing or blankets (40%)**
  - **Hot water bottles (19%)**
  - **Electric blankets (16%)**
  - **Using very little or no heating (12%)** highest across all age groups

This suggests older tenants are **more likely to adjust how they stay warm**, often using multiple methods.

- **Those aged 31 - 60 also show steady use of these approaches**, particularly:
  - **Electric blankets (9 - 10%)**
  - **Hot water bottles (8 - 11%)**
- **Those aged 18–30 is the least likely to report using these methods**, with very low use across most options.

This suggests younger tenants may be **less likely to rely on alternative ways to keep warm** or may be managing heating differently.

Use of these strategies increases with age, particularly for lower-cost options like blankets and hot water bottles.

This suggests that older tenants are **more likely to adapt their behaviour to manage heating costs**, while younger tenants rely less on these approaches.

By Tenure

- Overall, patterns are broadly similar across social housing and the PRS, with most tenants relying on **extra clothing or blankets**.
- However, some differences stand out:
    - **Social housing tenants are more likely to use hot water bottles**, suggesting greater reliance on low-cost ways to stay warm.
    - Use of **extra clothing or blankets is high and fairly similar across both tenures**.
    - **PRS tenants are more likely to use additional heating sources (such as portable heaters)**, even slightly higher than the overall average.

Underrepresented Groups

- Among underrepresented groups, patterns are broadly consistent with the overall sample.

COMMENT SECTION NEXT>>

Insights from Open Responses

- **Reliance on alternative heating sources:**
  Several respondents reported using ***portable electric heaters, electric fires, or Dyson heaters,*** often in place of central heating.

- **Limited or controlled use of heating:**
  Many described **restricting heating use**, such as:
  - Using heating on a timer
  - Keeping the thermostat very low
  - Heating only for short periods to "take the chill off"

- **Use of insulation and heat-retention methods:**
  Some tenants are taking practical steps to **retain heat**, such as:
  - Placing foil or cardboard behind radiators
  - Managing draughts in poorly insulated homes

- **Heavy reliance on clothing and bedding:**
  Responses included **wearing multiple layers** or using **high tog duvets**, with some going to bed early to stay warm.

- **Issues with heating systems or housing conditions:**
  A number of responses highlight **structural problems**, including:
  - Heating systems not working
  - Delays in repairs
  - Cold and draughty homes despite insulation claims

- **Health-related needs:**
  Some tenants noted **underlying health conditions** (e.g., COPD) which increase the need for warmth.

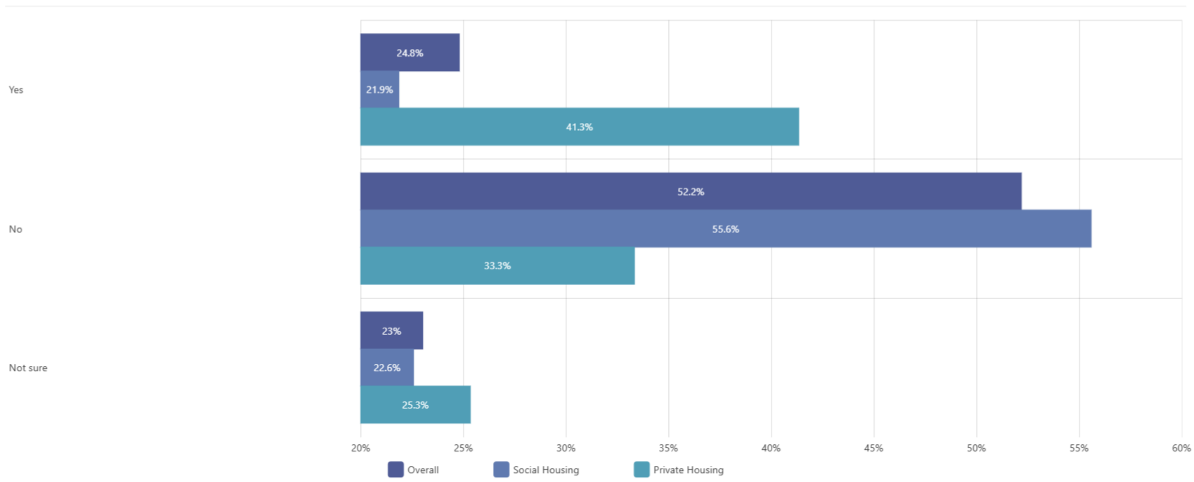
- **Heating included in rent:**
  A small number reported that **heating costs are included in rent or service charges**, meaning they manage heating differently.

Section 2 - Attitudes and Perceptions: EPC, Smart Meter and Tariffs

Understanding how energy works in the home is an important part of managing costs. This includes knowing how energy efficient a home is, how energy is used, and what options are available to reduce bills.

In this section, we explore tenants' awareness of Energy Performance Certificates (EPCs), smart meters, and energy tariffs.

Q. Do you know the Energy Performance Certificate (EPC) rating of your home?



- Overall, **25% of all respondents say they know their EPC rating**, while **52% say they do not**, and a **further 23% are not sure.**
- This continues to highlight **low awareness** of energy efficiency ratings among tenants, **similar to last year.**
- While awareness appears slightly higher than in 2025 (21%), comparisons should be treated with caution, as the question was asked differently.

Who is most and least aware? (By Tenure)

- Private renters remain the most likely to know their EPC rating (41%), although this is lower than last year (48%).
- In contrast, awareness remains significantly lower among social housing tenants, with:

- 22% in social housing saying they know their EPC rating
- 55% saying they do not know

This may reflect differences in how properties are let and advertised.
In the private rental sector, EPC ratings are more commonly included in listings, while **social housing tenants may have fewer opportunities to see or be informed about their EPC rating**.

By Age Group

- Those aged 18–30 is now the most likely to know their EPC rating (48%), showing a strong increase compared to last year.

- Awareness is lower among other groups:
  - 31–45: 31%
  - 46–60: 21%
  - 60+: 23%

Unlike last year, where patterns were mixed, younger tenants now show the highest awareness, while awareness remains lower among older groups.

Underrepresented Groups

- Among underrepresented groups:
  - 28% say they know their EPC rating
  - 53% say they do not

This closely reflects the overall trend

Q. Can you tell us the EPC rating of your home?

Social housing currently does not have high levels of valid EPC certificates. We would expect that to change as WHQS2 progresses as landlord progress compliance, but will the tenant be aware?

We also asked tenants who said they knew their EPC rating to tell us what it was.

These responses provide further insight into how well EPC ratings are understood in practice.

- Among those who said they knew their EPC rating, many were able to provide a specific grade, **with most responses falling within EPC bands C and D,** and some reporting higher ratings such as A or B.

- However, even within this group, there were signs of uncertainty or inconsistency, with responses such as:
    - "B or C", "C–D", or partial entries (e.g. "C78")

- **One respondent reported an EPC rating of G**, which falls below the minimum standard for rented properties unless an exemption applies.
- While keeping responses anonymous, this respondent was an **older tenant (60+) in social housing (Local Authority) in Southwest Wales**, who also reported:
    - using **extra clothing or blankets**
    - relying on **hot water bottles**
    - and **using very little or no heating**
- This example highlights how **low energy efficiency, combined with reduced heating use, can directly affect how tenants keep warm**.

- Some tenants also reported that their EPC had **expired or not been renewed**, raising further questions about how up-to-date and visible this information is.

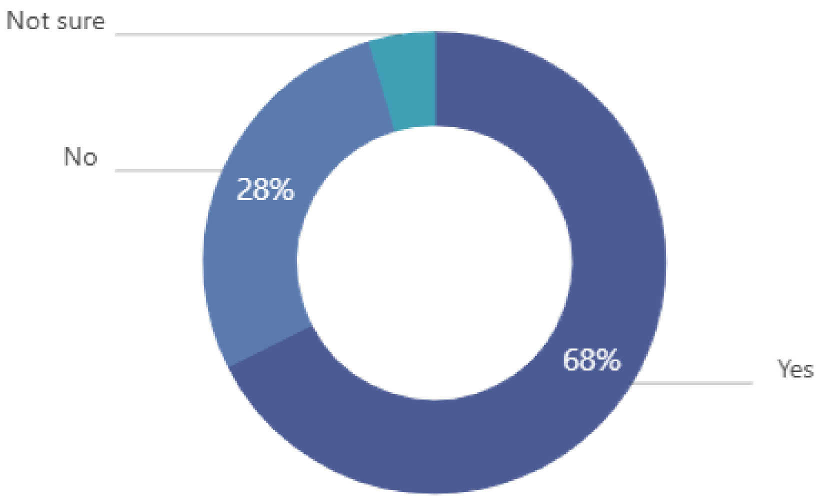
- A notable number of responses also came from tenants who had initially said they did not know their EPC rating, including:
    - "Don't know" / "No" / "Haven't got one"
    - References to EPCs being expired or not renewed

- Some tenants also raised concerns about accuracy or housing conditions, for example:
    - EPCs that had expired or failed
    - Homes performing worse than their rating suggests
    - Issues such as faulty insulation or cold, damp conditions

This suggests that while some tenants are aware of their EPC rating, understanding is often partial, and in some cases the rating may not reflect lived experience.

Knowing the EPC rating does not always mean fully understanding it, and some tenants question whether it reflects the true condition of their home.

Q. Do you have a smart meter in your home?



Smart meters are often seen as a key tool in helping tenants understand and manage their energy use. However, through our work with tenants, landlords, and wider stakeholders, we are aware of ongoing concerns around their use. These include issues around faulty meters, inaccurate readings, and a general lack of trust, which have been widely reported and can affect willingness to adopt them.

At the same time, under the Welsh Housing Quality Standard (WHQS), tenants should be **given a choice** and **encouraged to have a smart meter**, recognising that access to accurate energy information can support better decision-making and potentially reduce costs. Importantly, this remains a **tenant right**, and any approach should respect individual preference.

Smart meters can also play an important role where landlords are developing policies linked to energy use, such as the **Smart Export Guarantee or other energy schemes**, where accurate monitoring of energy consumption and generation becomes increasingly relevant.

- Overall, **68% of respondents say they have a smart meter**, while **28% say they do not**, and a small proportion are **not sure (4%)**

This shows that **smart meter uptake is relatively high**, with around two-thirds of tenants already using one.

By Tenure

- **Smart meter use is highest in social housing**; with **72% reporting they have one**.

- In comparison, **48% of private renters report having a smart meter**, with a higher proportion (**41%**) saying they do not.

Underrepresented Groups

- Among underrepresented groups:

    - **69% report having a smart meter overall**

    - **73% in social housing**

    - **51% in the PRS**

By Age Group

- Those aged 31+ report consistently higher smart meter uptake (68–69%) than those aged 18–30, with much lower levels of uncertainty (2–7% compared to 24%).
- Among younger tenants (18–30), only 43% report having a smart meter, with 33% not having one and 24% unsure - the highest level of uncertainty - suggesting lower access to, and awareness of, smart meters within this group.

Q. If you do not have a smart meter, can you please tell us why you do not have a smart meter?

Among those who said they do not have a smart meter, several clear themes emerged:

1. Lack of trust and negative perceptions

Many tenants expressed **concerns about reliability and trust**, including:

- "Don't trust them"
- "Unreliable"
- "Bad publicity"
- Concerns about **incorrect billing or higher costs**

Some also felt smart meters:

- **Do not save money**
- May lead to **stress or reduced heating use**

This reflects ongoing **trust issues**, often shaped by past experiences or wider public perception.

2. Personal choice / preference not to have one

Many tenants simply stated:

- **"Don't want one"**
- **"Not needed"**
- **"Happy with what I have"**

Others preferred:

- **Manual meter readings**
- **Prepayment systems (key or coin meters)**

This reinforces that **having a smart meter is seen as a choice**, not a necessity.

3. Landlord restrictions or tenancy barriers

Several tenants reported they were **unable to install a smart meter due to landlord decisions**, including:

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

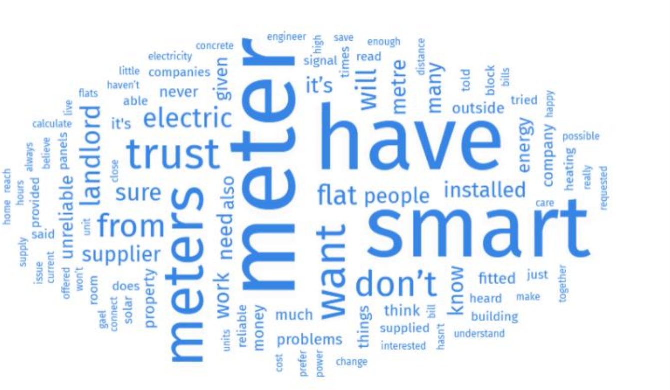
4. Installation and technical limitations

A significant number of responses pointed to **practical barriers**, such as:

- Meters being **too far apart**
- **Poor signal** (especially in flats or buildings with thick walls)
- **No space** for installation
- **Compatibility issues** (e.g. solar panels, shared systems)

5. Not offered or not provided

Many tenants reported that:



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

6. Lack of understanding or awareness

Some responses showed:

- **Uncertainty about what a smart meter is**
- Confusion between **meters and in-home displays**
- Not knowing **how it would benefit them**

This links back to a broader issue of **energy awareness and communication**.

7. Health, accessibility, and personal circumstances

A smaller number of responses highlighted:

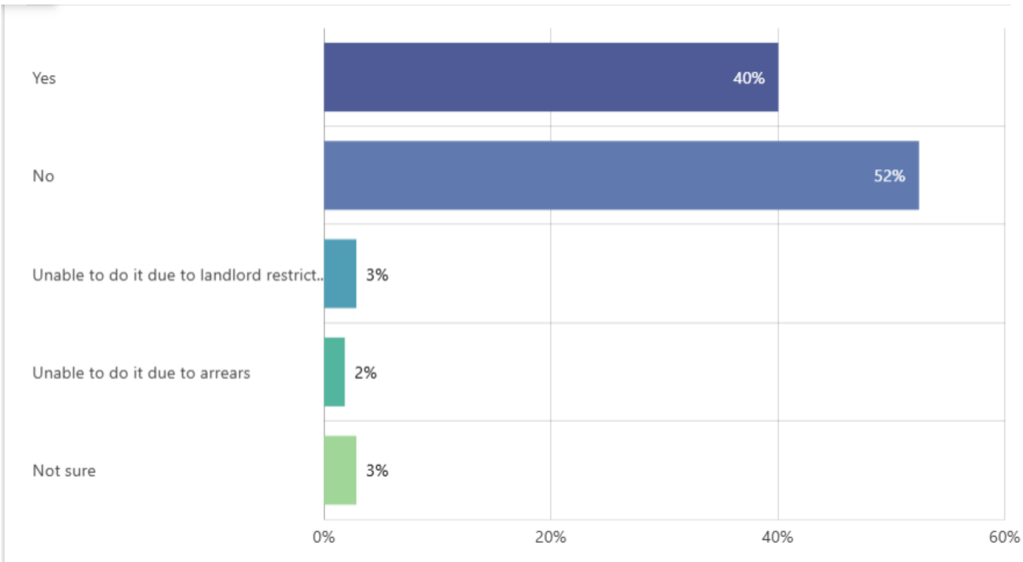
- Requests for **accessible meters (e.g. RNIB approved) not fulfilled**
- **Health-related concerns** or sensitivities & Difficulty accessing meters (e.g. height, location)

Q. Have you switched your energy tariffs in the last two years to try reducing your bills? (Gas/Electricity)

(the price or deal your energy supplier charges you for gas and electricity)

Overall, **only 40% of respondents say they have switched their energy tariff**, while **52% say they have not**.

This shows that **more than half of tenants are not actively switching tariffs**, despite ongoing cost pressures.



By Tenure

- **Social housing tenants are slightly more likely to switch (42%)** compared to **29% in the PRS**.
- In contrast, **56% of private renters say they have not switched**, compared to **52% in social housing**.

This suggests that **switching is less common in the PRS**, where tenants may face more barriers or uncertainty around changing tariffs.

Underrepresented Groups

- Among underrepresented groups:
    - **40% say they have switched**
    - **53% say they have not**
    - **33% of PRS respondents within this group have switched**, compared to **42% in social housing**

This mirrors the overall trend, with **lower switching levels in the PRS**.

By Age Group

- Those aged 18–30 are the least likely to have switched tariffs, with only 12% saying they have switched, while 65% say they have not.
- Those aged 31–45 show the highest level of switching, with 45% saying they have switched, and 45% saying they have not.
- Those aged 46–60 also report high levels of switching, with 44% saying they have switched, while 50% say they have not.
- Those aged 60+ are less likely to switch compared to mid-age groups, with 37% saying they have switched, and 57% saying they have not.

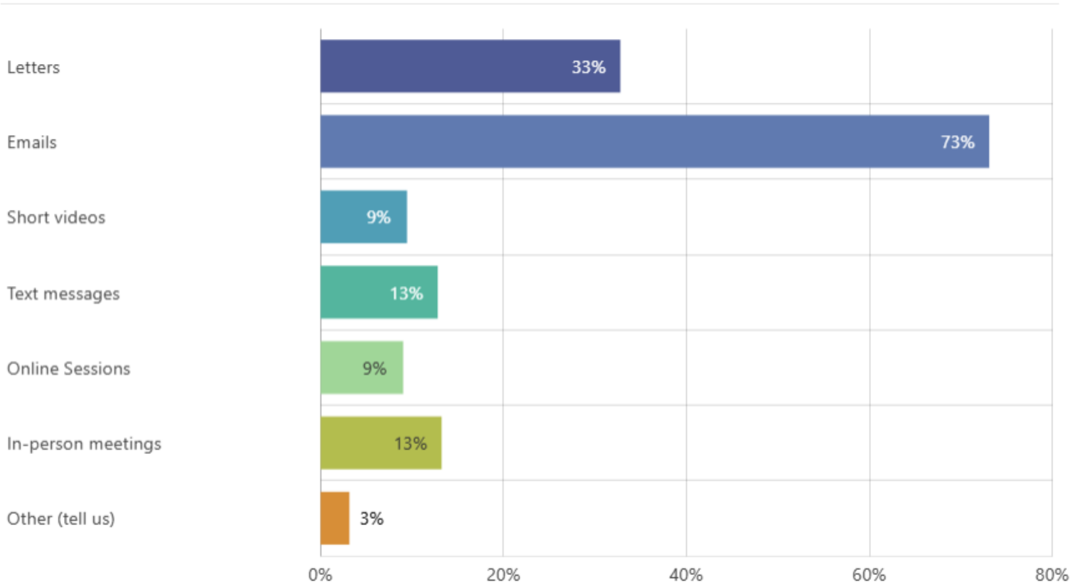
Key Insight

Switching is highest among those aged 31–45 (45%) and lowest among those aged 18–30 (12%), showing a clear gap between age groups.

Section 3 - Looking ahead, what tenants want

Providing the right information is only effective if it reaches people in the right way. To support future engagement, we asked tenants how they would prefer to receive information about energy efficiency and sustainability.

Q. Looking ahead, how would you like to receive information or support about energy efficiency and sustainability



- **Email is clearly the dominant preference**, with **73% overall**, **74% in social housing**, and **70% in the PRS** selecting it.

- **Letters remain important, particularly in social housing**, with **36% selecting this option**, compared to **18% in the PRS**.

- While digital channels lead, this shows that **traditional communication still matters for a significant group of tenants**.

- **Private renters show a stronger preference for visual content**, with **16% selecting short videos**, compared to **8% in social housing**.

- **Text messages show a clear split by tenure**, with **15% in social housing** selecting this option compared to **4% in the PRS**.

This points to **more direct, short-form communication being more relevant in social housing**.

- **In-person meetings (13%) and online sessions (9%) are less preferred overall**, but still relevant for targeted engagement.

Underrepresented Groups

- The pattern remains consistent, with **email again the top choice (75%)**.

- However, **short videos are more popular in the PRS (22%)**, compared to **9% in social housing**.

By Age Group

- **Those aged 60+ show the strongest preference for letters (40%)**, alongside **emails (34%)**.

- **Those aged 46–60 show a clear preference for emails (22%) and letters (26%)**, with some use of texts and videos.

- **Those aged 31–45 and 18–30 show much lower engagement across all options**, particularly:
  - **18–30: emails (2%), letters (0.63%)**

This suggests **lower engagement with this question among younger respondents**, rather than a clear preference.

Additional Insights from Open Responses

Responses provided under "Other" highlight a range of views that go beyond preferred communication methods:

1. Preference for direct or personal contact

- Some tenants expressed a preference for:
    - **One-to-one support**
    - **Telephone conversations**

This suggests that for some, **personalised support may be more effective than general information**.

2. No interest in receiving further information

- Several respondents indicated they did not want additional information, including:
    - "None"
    - "None thanks"
    - "I wouldn't"
    - "Not at all, thanks"
    - "Not looking for added stress"

This highlights that **not all tenants are seeking more communication**, and some may feel overwhelmed or disengaged.

3. Focus on housing conditions rather than advice

- Some responses pointed to **structural issues in the home**, such as:
    - Cold, damp, or poorly insulated properties
    - Outdated or inefficient heating systems

These responses suggest that **for some tenants, the issue is not lack of information, but the condition of the home itself**.

4. Perception that no further support is needed

- A small number of respondents felt they were already managing energy use effectively, noting:
    - They already use energy efficiently
    - Their main costs come from **standing charges rather than usage**

5. Alternative suggestions

- A few respondents suggested:
    - **Web-based information**
    - **Short videos (where appropriate)**

Section 4 - Different pathways

Background

Welsh Housing Quality Standard (WHQS) – Home Assessments

The final two questions in this survey were tailored based on whether respondents lived in social housing or the private rental sector. Based on their initial response, tenants were asked follow-up questions relevant to their housing type.

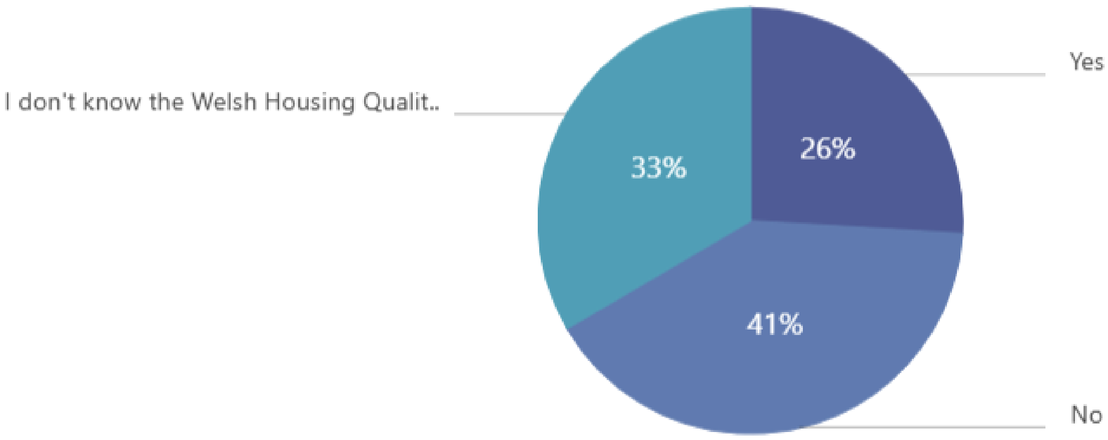
For social housing tenants, we focused on the **Welsh Housing Quality Standard (WHQS)** As part of this programme, landlords are required to assess homes to ensure they meet updated standards, including those set out in **WHQS 2023 (WHQS 2)**.

A **home assessment or survey**, particularly under the *affordable warmth* element of WHQS 2, typically involves reviewing whether a home can be **heated efficiently and affordably**. This includes checks on:

- the **energy efficiency of the property (EPC and insulation)**
- the **type and condition of heating systems**
- whether the home can maintain a **comfortable indoor temperature without excessive cost**

These assessments help landlords identify improvements needed to ensure homes are **safe, warm, and energy efficient**, and that tenants are not placed at risk of fuel poverty.

Q. Have you had a home assessment or survey carried out as part of the WHQS (Welsh Housing Quality Standard) programme



  - **26%** say they **have** had a home assessment or survey carried out
  - **41% say they have not**
  - **33% say they do not know about the WHQS programme**

This shows that **only around a quarter of tenants recall an assessment taking place**, while a much larger proportion either have not had one or are unsure about the programme itself.

By Region

- **North Wales reports the highest level of assessments carried out**, with **36% saying yes**, compared to:
  - **Mid & West Wales: 25%**
  - **South East Wales: 24%**
  - **South West Wales: 23%**

  This suggests that **awareness of home assessments is not consistent across regions**.

- Awareness also varies:
  - **Mid & West Wales: 38% do not know WHQS**
  - **South East Wales: 37%**
  - **South West Wales: 30%**
  - **North Wales: 25%**

  In some areas, a **large proportion of tenants are not aware of the programme linked to these assessments**.

By Landlord Type

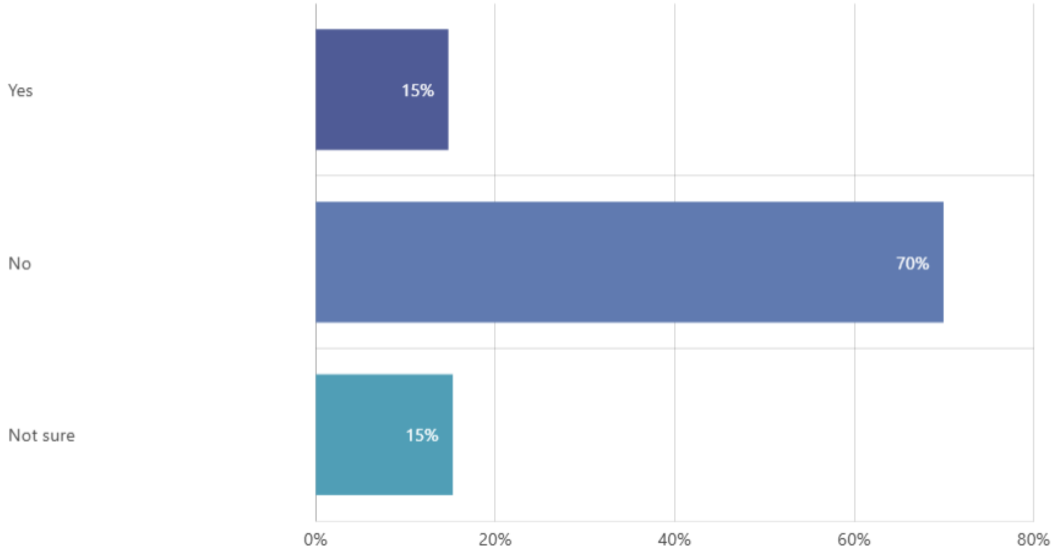
- **Housing Association tenants are more likely to report having had an assessment (28%)**, compared to **21% in Local Authority housing**.

- **Local Authority tenants are more likely to say they have not had an assessment (46%)**, compared to **39% in Housing Associations.**

- Levels of awareness are similar:
  - **Local Authority: 34% do not know WHQS**
  - **Housing Associations: 33%**

This may suggest that where more home assessments are being carried out, awareness of the programme is also higher.

Q. Has your landlord communicated their plans for energy improvements for your home?



- **15% say their landlord has communicated plans**
- **70% say they have not**
- **15% are not sure**

By Landlord Type

- **Housing Association tenants are more likely to report communication (18%)** compared to **6% in Local Authority housing**.
- In contrast:
  - **77% of Local Authority tenants say they have not received communication**
  - Compared to **68% in Housing Associations**

By Region

- Communication levels remain low across all regions:
  - **North Wales: 17% say yes (highest)**
  - **South West Wales: 15%**
  - **Mid & West Wales: 15%**
  - **South East Wales: 10% (lowest)**

Even in the highest region, **fewer than 1 in 5 tenants report receiving communication**.

- The proportion saying **"No" is consistently high across regions**:
    - **South East Wales: 72%**
    - **Mid & West Wales: 72%**
    - **South West Wales: 70%**
    - **North Wales: 69%**

> While earlier findings showed that only a minority of tenants report having had a home assessment, these results suggest that even fewer are aware of future plans for improvements.
>
> This gap between activity and communication may affect how tenants understand and experience ongoing energy efficiency programmes.

The following questions were asked specifically to tenants in the private rented sector, focusing on how energy efficiency factors into their housing decisions.

Private Renters: Energy Efficiency and Housing Choices

The **Energy Performance Certificate (EPC)** is a key indicator of how energy efficient a home is and gives an indication of how costly it may be to heat and run. While the EPC framework is widely recognised as having limitations and is currently under review, it remains one of the few standardised measures available to tenants when comparing properties.

Given the rising cost of energy and the growing importance of affordable warmth, EPC ratings have the potential to play an important role in helping tenants make informed choices. However, this depends on awareness, understanding, and whether tenants are able to factor this information into their decision-making.

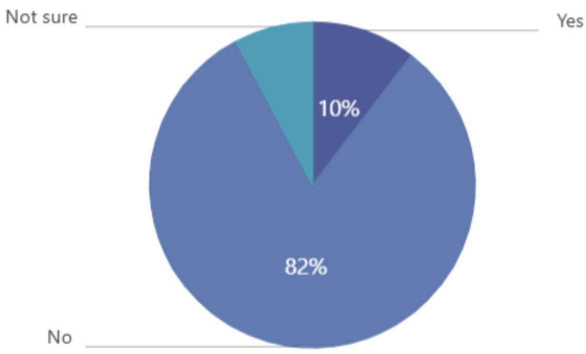
To explore this further, we asked:

Q. Did the Energy Efficiency Rating (EPC) influence your decision to rent this home?

Overall, **only 10% of private renters say EPC influenced their decision**, while **82% say it did not**.

By Region

- EPC influence remains low across all regions:
    - **South West: 21% (highest)**
    - **Mid & West: 10%**
    - **South East: 8%**
    - **North Wales: 0%**



Even in the highest region, **only around 1 in 5 tenants say EPC influenced their decision**, and in some areas, **it plays no role at all**.

- The proportion saying **"No" is consistently high**:
    - **North Wales: 92%**
    - **Mid & West: 80%**
    - **South East: 86%**
    - **South West: 68%**

By Age Group

- **Those aged 18–30 show the highest influence**, with **33% saying EPC affected their decision**, compared to:
    - **31–45: 14%**
    - **46–60: 0%**
    - **60+: 4%**

This suggests that **younger tenants are more likely to consider EPC**, although this is still a minority.

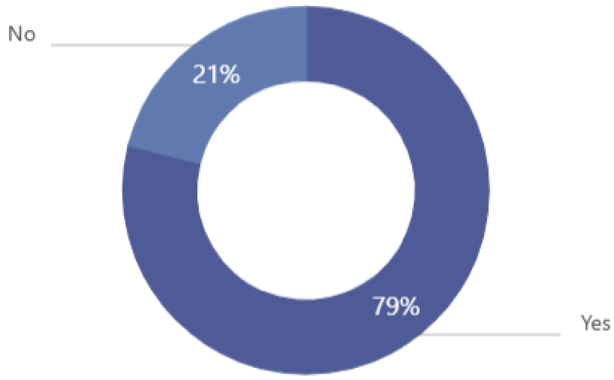
At the same time, the majority in all age groups say EPC did not influence their decision.

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.

This likely reflects wider constraints in the PRS, where limited housing availability restricts choice, meaning tenants are less able to prioritise energy efficiency when securing a home. As tenants expressed:

"Choice isn't an option when you are faced with homelessness," "No choice," and "People would rather have a cold roof over their heads than no roof."

Q. If your home were more energy efficient, would you be more likely to stay there long term?



- **79% of private renters say they would be more likely to stay**, while **21% say they would not**.

By Age Group

- **18–30: 100% say they would be more likely to stay**
- **31–45: 77% say yes**
- **46–60: 65% say yes**
- **60+: 81% say yes**

While earlier findings show that EPC ratings do not influence rental decisions for most tenants, these results suggest that energy efficiency itself is highly important once tenants are living in a property.

This highlights a gap between what tenants consider when choosing a home and what matters for long-term satisfaction.

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

Final Question we asked – why not join the conversation!

Q. Would you like to be contacted to join a small, private discussion with other renters to share views on energy efficiency or Net Zero works.

A total of **116 respondents expressed interest in taking part in private discussions** to share their views on energy efficiency and Net Zero.

It represents a **strong and engaged group of tenants willing to contribute in more depth**.

Next Steps

Tenants have given time to give 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, Members of 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 within the sector and through the 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 hear your views on this report and especially what actions you plan to take. Thank you. Diolch.

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 the thank 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:

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 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 to the Codi Group who sponsor this work.

To meet one of our team to discuss the points raised, please contact: Akshita Lakhiwal, Net Zero Engagement lead: akshita@tpas.cymru.