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TENANT PULSE ON ENERGY EFFICIENCY AND AFFORDABLE WARMTH

MAY 2024

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Foreword

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

Before I start, I must say a massive thank you to all the tenants and renters who took the time to complete the survey. Your voice is so important and TPAS Cymru will do everything they can to make sure that the time and effort you have given us ensures that your voice is heard. I make that promise on behalf of TPAS Cymru – we will make sure you are listened to.

This annual survey is designed to examine and track tenant views on the decarbonisation agenda and related behaviours since the cost-of-living crisis. We believe, as the tenant engagement organisation for Wales, that this report provides decision makers with impactful insight into what really matters to tenants regarding the Net Zero challenge.

We received an excellent response rate from across Wales from a wide range of occupancies, including tenants of housing associations, local authority housing, supported housing, and tenants in the private rental sector. We believe the private renter voice is important in looking at the challenges, similarities, and differences in renter experiences.

This report provides clear evidence of the perception of Net Zero; on desires around landlord communication about Net Zero works. We hope that housing sector stakeholders will read this report and find a fresh perspective on Net Zero and recognise the importance of involving tenants in this conversation.

I was particularly pleased that when we asked tenants if they would like to follow up this survey with 2 more in-depth NetZero focus groups, 25% of respondents gave us their details!

Finally, I would like to thank once again all of those who took the time to respond 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:

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 these 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, such as those aimed at 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 the Tenant Pulse portal on our website. www.tpas.cymru/pulse

Background and Introduction to this survey

Wales is aiming to achieve Net Zero by 2050 with a focus on affordable and sustainable housing. This is particularly crucial considering the economic challenges that emerged following the cost-of-living crisis in 2022 and the evolving landscape of energy innovation and climate policy.

Net Zero aims to negate the amount of greenhouse gases produced by human activity through reduced emissions and carbon absorption. This has led to several Welsh Government programmes such as the Optimised Retrofit Program & Low Carbon Housing Development.

At the heart of this is effective tenant engagement, ensuring that our move to Net Zero not only focuses on technological and environmental improvement but also on community well-being and active participation.

This report explores the knowledge and awareness of tenants in Wales in relation to Net Zero and the energy efficiency of their home. It investigates attitudes and perceptions of climate change, the quality of landlord communications with them relating to Net Zero solutions, changed behaviours in the last year, and the costs of Net Zero.

Key Findings

Concern Over Energy Costs and Efficiency: **72%** of respondents felt that their heating running cost was unaffordable. The data also revealed significant variations in perceptions of heating affordability among different age groups and housing types.

Communication Gaps from Landlords: **88%** of respondents said they have not received any communication from their landlords about Net Zero or energy efficiency improvements, marking a 6% increase from last year.

Varied Preferences in Learning About Energy Systems: Survey findings show that younger tenants prefer digital resources such as videos for learning about new heating systems, whilst older tenants favour printed manuals and live demonstrations. A combined approach is essential to effectively meet everyone's needs.

Economic Concerns Linked to Energy Investments: There is noticeable scepticism about the economic benefits of energy investments (e.g. whether energy savings to the tenant will outweigh the costs of energy-efficient upgrades or increased rents)

Water Conservation Efforts and Space Constraints: **72% of responders supported** installing water butts for water conservation. Yet, concerns like shared living challenges, maintenance, health risks, and physical limitations highlight the need for tailored solutions to meet diverse tenant needs.

Low Awareness and Knowledge of EPC Ratings: While a vast majority (**92%**) have seen an Energy Performance Chart (EPC) before, **only 29% know** their home's energy efficiency rating, suggesting that awareness does not necessarily equate to understanding.

Smart Meter Adoption Concerns: The survey found that **61% of respondents have a smart meter installed**. However, **19% are resistant to using this technology**. An additional 20% are open to the idea but seek more information to overcome their hesitations. Common obstacles include technical issues, space constraints, and a lack of clarity on the benefits and functionality of smart meters. These insights suggest a need for better support and clearer communication to help tenants understand and accept smart meter technology.

Author: Akshita Lakhiwal

Supported by: David Wilton

Promoted by: Eleanor Speer

May 2024

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').
- Landlords from across Wales supported this survey by promoting it to their tenants- via social media, text and flyer. As per our past findings (Annual Survey 2023, Net Zero Survey 2023), this action creates some noticeable differences in response rates per area depending on landlord engagement and their tenant demographic.
- This survey was also promoted via the TPAS Cymru social media channels, including Facebook, Instagram, TikTok and LinkedIn.
- And like our past promotions of Tenant Pulse surveys, we conducted a paid social media advertisement for this survey. This advertisement was conducted on Meta (across Instagram and Facebook) platforms. This method has a proven track record of supporting TPAS Cymru to access a younger tenant voice, notably of renters under 35 and those who privately rent.
- From our past experiences with Tenant Pulse and the data we gather from these surveys, we can infer that the younger tenant 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 ran over 6 days with a spend of around £90. This advert reached 33,771 Meta users and pointed over 300 users to click through to our website and survey.
- 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.



The insight in this report is in 4 sections:

Section 1 – Tenant Voices: Heart of this Report

Section 2 – Attitudes and Perceptions: Climate Change, Fuel Poverty & Decarbonisation

Section 3 - Sustainable Practices and Energy Consumption Adaptations

Section 4 – Decarbonising homes/NetZero/Affordable Warmth

Section 1 – Tenant Voices: the Heart of this Report

Under the TPAS Cymru Tenant Pulse branding, using the Tenant Pulse platform (powered by QuestionPro online survey tool), TPAS Cymru shared 23 questions to the tenant & renter community in March 2024. Tenants from across Wales were asked about their thoughts and behaviours relating to NetZero and energy efficiency, as well as the type of engagement they would like in the future regarding decarbonising homes.

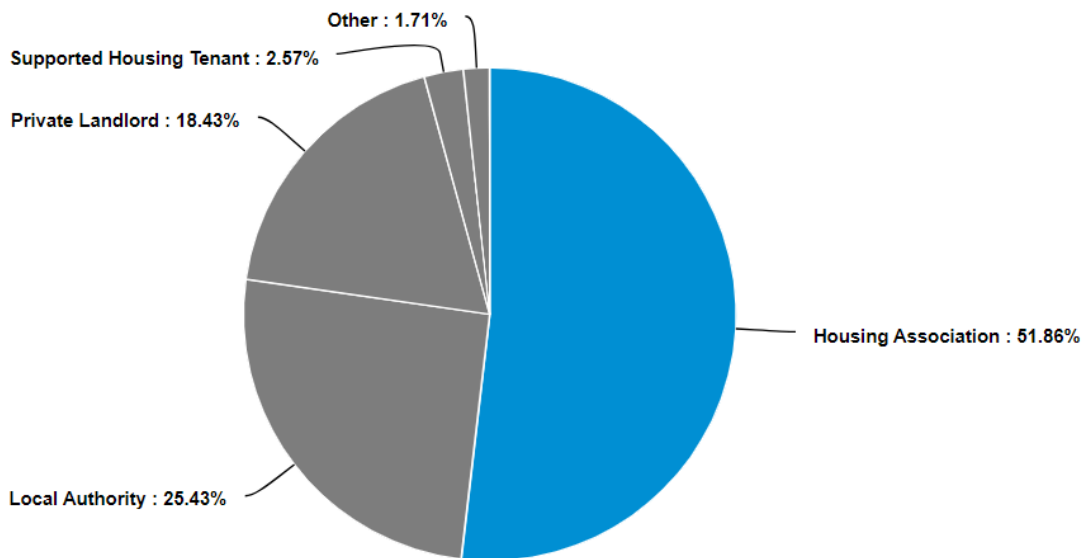
Response summary

A total of 758 tenant respondents (up 8.5% on last year)

- All twenty-two counties in Wales are represented in this survey.
- High responding areas are often the higher density urban areas like Cardiff, Swansea etc.
- For private renters – again urban areas see a higher level of response; except for Conwy where the response was good.
- For Minority Ethnic (BAME) tenants they are almost exclusively living along the M4 corridor from Monmouthshire to Pembrokeshire (including RCT) – only notable exception is Ceredigion.
- Powys is a strong responder for its' population but is driven by older, social housing tenants.
- In comparison Monmouthshire is one of the lower responding areas but had higher than average responses from younger people.

Highest responding areas	Lowest responding areas
1. Cardiff	1. Ynys Mon
2. Swansea	2. Denbighshire
3. RCT	3. Caerphilly
4. Powys	4. Torfaen
5. Conwy	5. Monmouthshire
6. Vale of Glamorgan	6. Flintshire

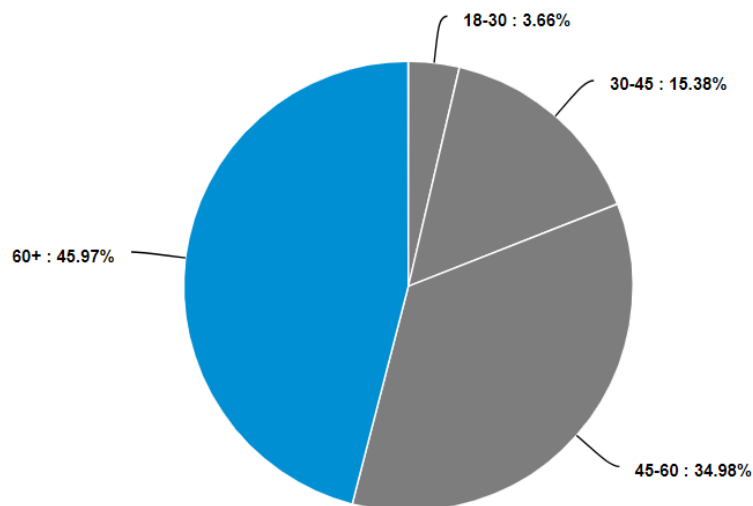
Breakdown of the type of Tenants/Renters responses



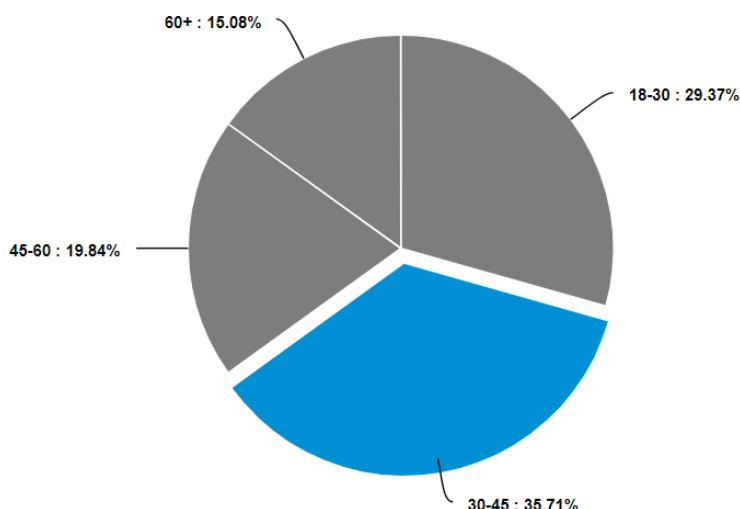
Whilst housing association tenants are still the largest housing category at 52% this is a fall from 61% last year. This has been driven by more responses in other housing type.

Age breakdown of respondents

The breakdown in the age of respondents shows a strong response from the older demographic, which is driven by social housing responders, whereas the age demographic of private renters is more spread out over the ages. However, this was a significant improvement on last year in terms of lowering the average age.



However, when you look at the age breakdown in **private housing**, you see a stronger response level from younger people:



There is a **significant difference in age demographics from responders in social housing compared to those private housing tenants**. For example, looking at those aged 18-30, there is a difference between the two groups - in social housing, respondents aged 18-30 accounted for 4% of the response, whereas in private housing, those aged 18-30 accounted for 29% of the total PRS response.

Overall, our 2024 survey provides a more balanced response across all age groups when compared to our 2023 survey – something TPAS Cymru aims to reach through our Pulse platform.

We hope to continue reaching the younger tenants as we believe that their voices are needed, providing valuable insights for future generations.

Black, Asian & Minority Ethnic (BAME) background

5.4% of tenants who responded overall identified as having a Black Asian Minority Ethnic (BAME) background. This is an **increase** in the representation of tenants from our 2023 Net Zero Survey by **3%**

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.

3.3% of tenants in **social housing** identified as having a Black Asian Minority Ethnic (BAME) background. This marks **an increase of 1.35%** compared to the findings of 2023 survey where it was 1.95% In addition, as the overall survey grows, so does the overall total BAME responses, meaning the data becomes more significant.

13% of tenants in private rental housing identified as having a Black Asian Minority Ethnic (BAME) background. This is an **increase of 9.8%** from last year (rising from 3.2% to 13%)

In **under30s** (all housing type) **33% identified as BAME compared to only 1.2% in over 60s**

As TPAS Cymru we will engage with staff, tenants, and communities of these social landlords to ensure broader representation in future Tenant Pulse surveys.

Every response by someone identifying in this group was downloaded and personally reviewed by the lead author to consider the responses individually and collectively against the main response data.

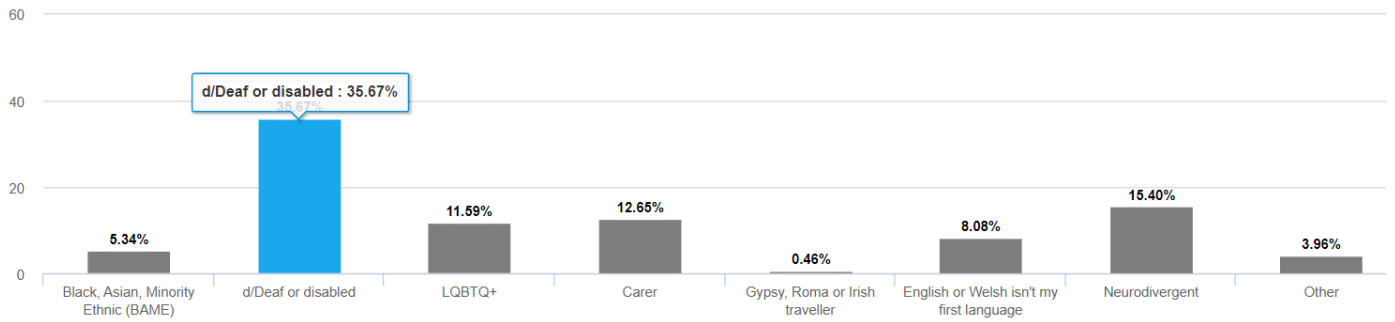
NEW TO THIS SURVEY

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
Black, Asian, Minority Ethnic (BAME)	5%	3%	13%
d/Deaf or Disabled	36%	40%	19%
LGBTQ+	12%	9%	25%
Carer	13%	14%	9%
Gypsy, Roma or Irish traveller	0.4%	0%	2%
English or Welsh isn't my first language	8.0%	8%	11%
Neurodivergent	15%	12%	32%
Other	4%	4%	3%

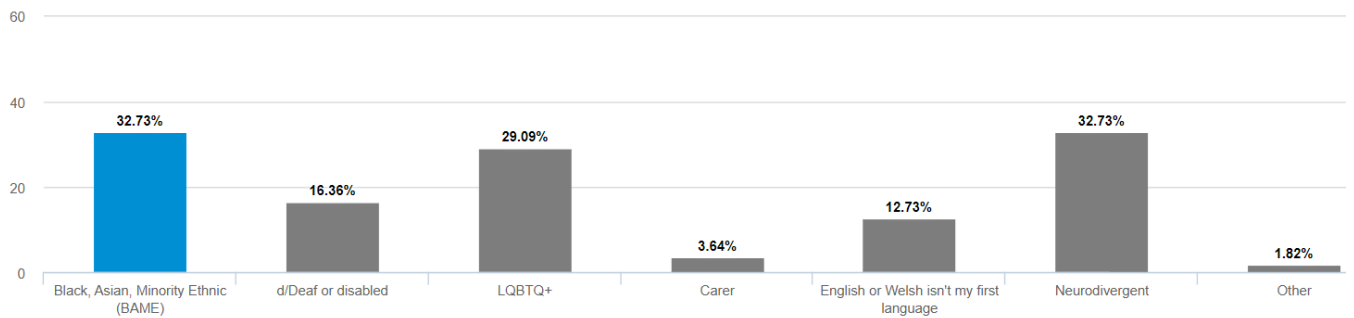
Think Point - We noticed that compared to other TPAS Cymru's Pulse topics, surveys themes on NetZero/Decarbonisation attract a less diverse audience across 'underrepresented groups'

(note: Some people identify with more than one group)

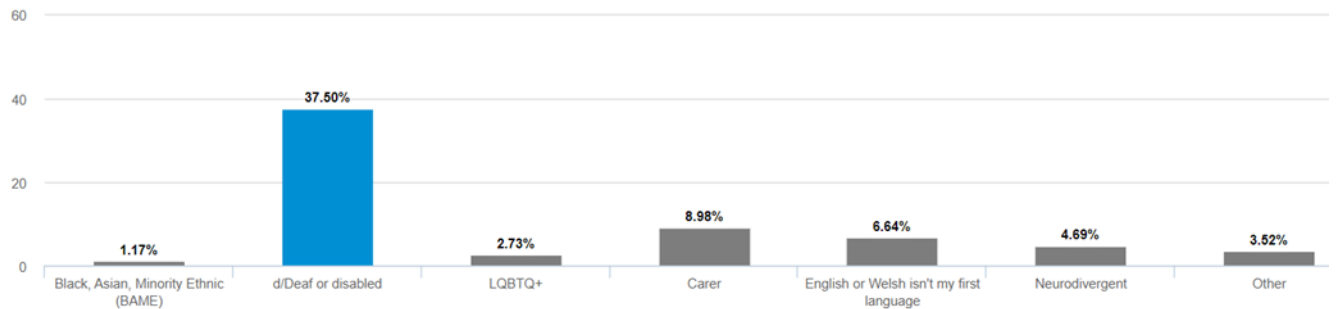


However, age plays a significant factor - when you look by age you see variations in diversity. Under30s have much stronger responses in underrepresented groups compared to over60s with the exception of those with disabilities.

Under 30s



Over60s



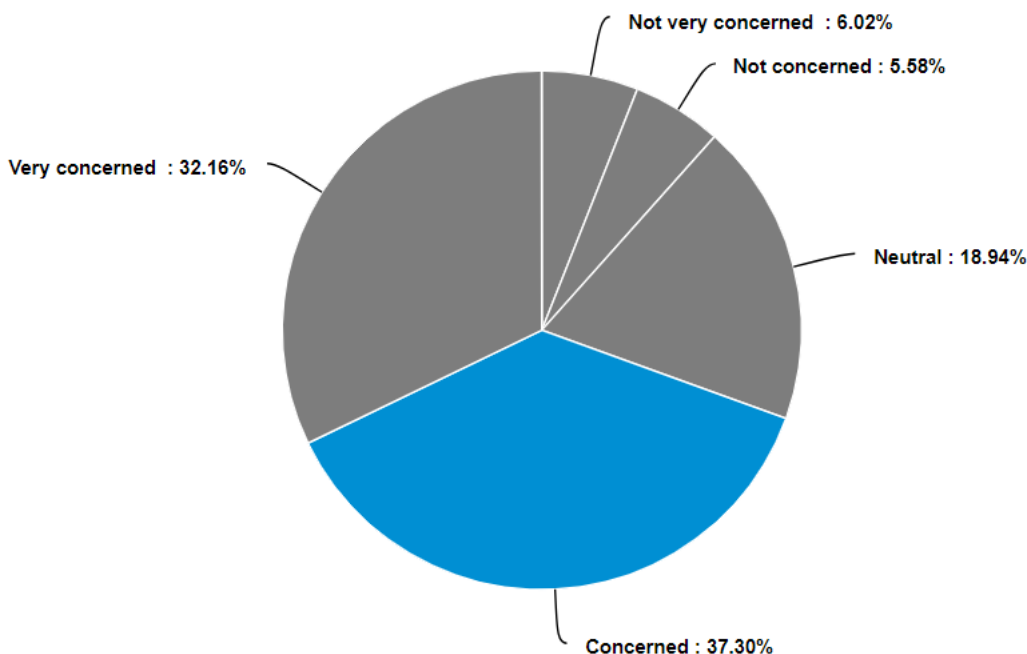
Section 2 – Attitudes and Perceptions: Climate change, Fuel Poverty and Decarbonisation

1) Climate Change and Attitudes to Decarbonisation

Before we explored renters' attitudes, we began by asking a control question to assess how they viewed climate change. This is a useful filter for interpreting insights gathered later in the survey.

- Overall, **60%** of all respondents expressed they **are very concerned/concerned** about climate change.
- **Under 30s** are most concerned, with **80% very concerned/concerned** and fewer than **10% not concerned**.
- There was not a noticeable least concerned. However, the **age group of 45-59** had the **biggest shift into 'neutral' ground (30%)** on the issue.
- The level of concern about climate change remains **high overall** from 2022 to 2024 with no significant movement across the options.

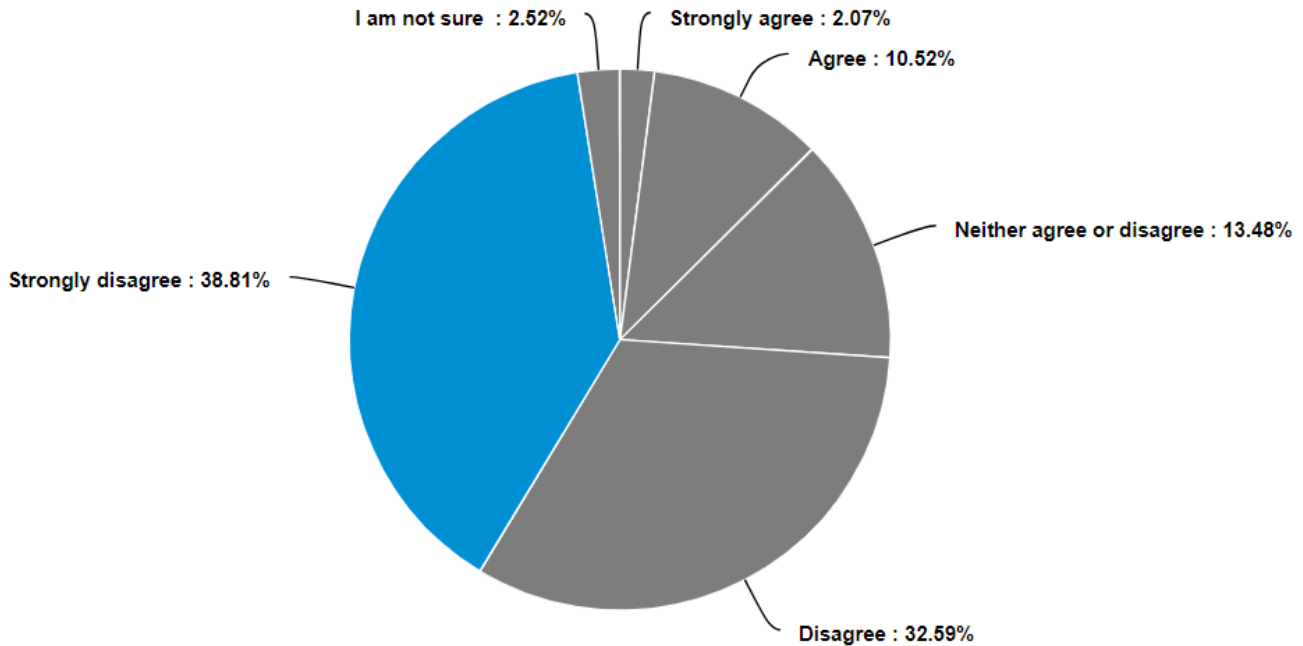
How concerned are you about the Climate Change?



2) Would you say that the running costs of your heating is affordable?

Heating costs can be a significant financial burden for many tenants, impacting their overall budget and quality of life. To gain insights into this important aspect of tenant experiences, we asked respondents if they think their heating costs are affordable.

- 72% of respondents felt their heating running cost was unaffordable,
- In contrast, only 12% agreed that the cost is affordable.



When we look in more detail:

- The **majority** of all age groups find heating **costs unaffordable**, with **the most** significant concerns reported by **older** (60+) and middle-aged (45-60) tenants.
- Specifically, **66%** of those aged 60+ felt that heating costs are unaffordable, the **highest was the 45-60** age group who similarly displayed high levels of dissatisfaction, with 82% feeling it was unaffordable.
- Contrastingly, the **youngest group** (18-30), while less unified, showed the **lowest level** on unaffordability at 47% and the highest level of affordability (30%)
- Another surprise was from renters who were **Black or Minority Ethnic** – they showed a slightly lower than average level of unaffordability at 59%, and a higher-than-average level of affordability (23%). This was mainly driven by younger responders – as detailed in the preceding point.

- When it came to private renter's v's social housing tenants; there wasn't a significant difference in their opinions on affordability of heating.
 - 15% of PRS renters viewed its heating as Affordable compared to 12% for social housing.
 - 75% of PRS renters viewed its heating as Unaffordable compared to 71% for social housing.

Think Point - Why do young responders find energy cost slightly more affordable than older responders?

From previous focus groups we have found:

- 1) It's all relative – older generations have known energy costs much lower in relation to their earnings. For younger people, costs have always been high, so they are more accepting.
- 2) Do younger people live in smaller properties, flats etc over older people living in bigger properties?
- 3) Do older people just like it warmer?

We aim to delve into these types of issues further with our new Tenant Pulse Advisory Group

3. Awareness and knowledge of Energy Performance Certificates (EPC)

Energy Performance Certificates (EPC) show how energy efficient a property is. EPC ratings are given to properties and are represented on a scale from A-G, A being most efficient, G being least efficient. All rented properties in the UK are required to have a valid EPC before a new tenant moves in, though they are not required to be updated when major works are completed or when they expire.

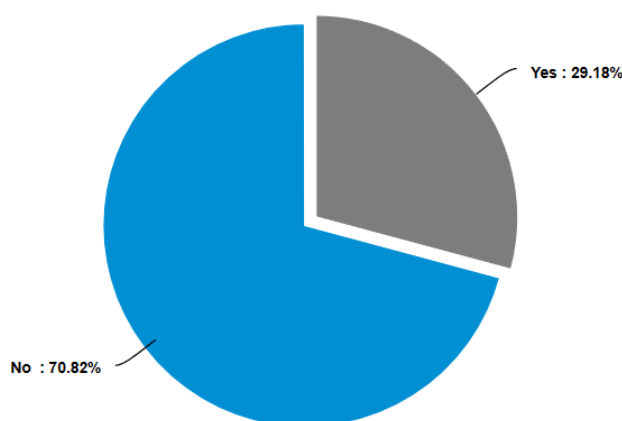
We showed an image of an EPC rating chart and asked if respondents had seen a chart like this before.

- **92% of total respondents answered that they had seen an EPC chart before.**
- When we asked if respondents knew what their own home's EPC rating was, **only 29% knew the EPC for their home.**
- Conversely **71% said that they did not know what their home EPC was.**

The occupancy type with the highest percentage of respondents who know their homes EPC rating was the private rented sector.

- 45% of **PRS respondents** knew their home's energy efficiency rating, compared to only 26% of housing association tenants and 20% of local authority tenants.
- The age group with the most respondents knowing their EPC rating was those ages 18-30, with 43% responding 'yes.' Respondents aged 60+ were the age group who knew least about their EPC, with only 23% stating that they knew their home's rating.

Do you know what your home's energy efficiency rating is?



Think Point

These findings support previous NetZero polling. Private renters have higher turnover of properties (and our PRS responders are much younger) so they are more likely to see EPC rating in listings and paperwork.

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?

AGE & CLIMATE CHANGE

- Among the **18-30 age group**, there is a **strong awareness** of Energy Performance Certificate (EPC) ratings, with 43% aware of their home's rating. This awareness aligns with their high concern for climate change, as indicated by 33% expressing 'Concerned' and 47% 'Very Concerned,' totalling 79% who show significant concern for climate change.
- Conversely, **within the 60+ age group**, 73% of this age group are notably concerned about climate change. However, **only 23%** know their EPC rating, suggesting that factors such as accessibility of information, engagement with sources of information, or lifestyle variations might play a more significant role in influencing EPC awareness in this demographic.

Follow up Question:

a) EPC Rating Self-Assessment

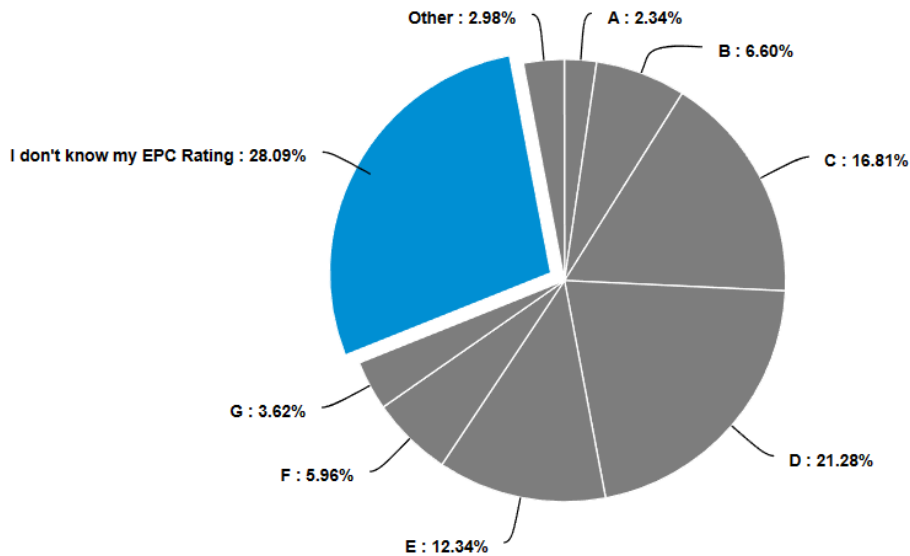
In our series of questions on EPC awareness, we also asked respondents what they think their EPC rating is:

- Immediately, 31% chose not to take a guess.

Of those who took a guess or knew:

- **EPC 'D' was the most reported** rating, with 21% of responses, while EPC 'A' was the least common at 2%.
- **Housing Associations** had the **highest number** of respondents with an EPC 'A' rating at 3%, while Local Authority tenants reported the most EPC 'G' ratings.
- Lower EPC rating perception may be because of several reasons including old housing stock, views on damp and mould. In Wales, a significant portion of the housing stock is old, with about 33% of dwellings constructed before 1930, according to data from the [Office for National Statistics](#).

Question asked: Can you tell us what you think your EPC rating is? (A-G ranking)



When we look a bit deeper at the question of knowing your EPC:

- Renters from Black or Minority Ethnic (BAME) background did not score anything for EPC A, B or G - most placed themselves in EPC C or D.
- Under 30s were more confident to guess or knew their EPC (mainly C) and had lowest 'Don't know' (20%)
- Over60s had the highest 'Don't know' of 38%.
- HOWEVER, when over60s estimate or knew their score, they scored much higher than the general population.

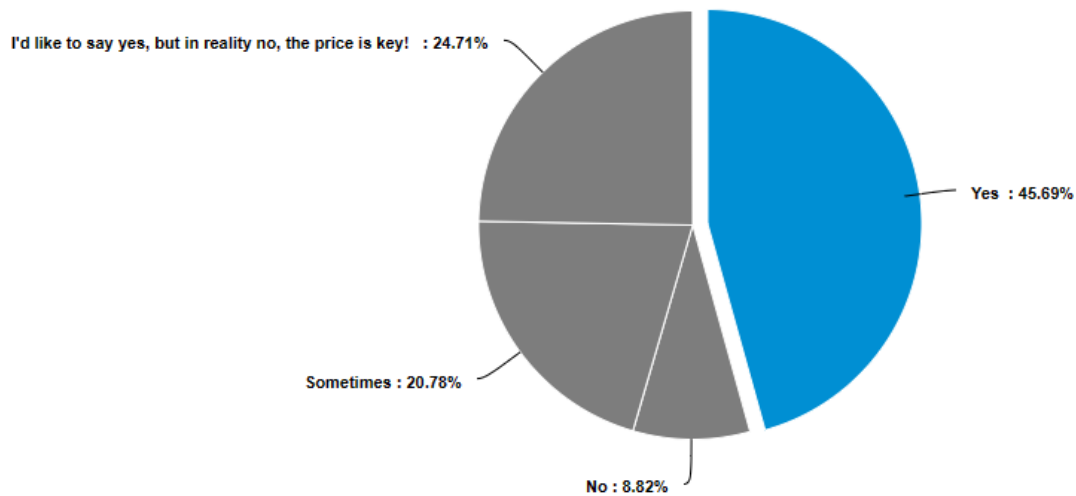
b) Influence of EPC Ratings on Purchasing Decisions:

To understand if EPC ratings influence tenants' buying patterns, we asked if EPC influences their decision when choosing home appliances or electronic gadgets:

- **46% of respondents said 'Yes'**, indicating that EPC ratings directly influence their purchasing decisions.
- **21% responded 'Sometimes'**, showing occasional consideration of EPC ratings.
- **9% stated that EPC ratings do not influence** their decisions.
- Additionally, **24% mentioned that while they would like to consider EPC ratings, price remains the key factor**, highlighting that while awareness of EPC and its impact is growing, cost is still a critical concern.

Among those who answered 'Yes', the highest proportion came from the Local Authority sector. In contrast, the PRS sector and Housing Associations had the highest proportion of

respondents (10% each) who said 'No', indicating that EPC ratings do not influence their purchasing decisions.



When looking in more detail at: *While buying home appliances and electronic gadgets for your home - has Energy Efficiency or EPC influenced your decision on choosing a product?*

- Under 30s and Black & minority ethnic responders **are least likely to be influenced by EPC**, both polling half the positive responses than the average.
- Under 30s and Black & minority ethnic responders also **showed double the response rate compared to the average** for, 'I'd like to say yes, but in reality, no, the price is key!'
- The **most influenced by EPC** were age 45-59 (53% compared to 46% for all responders)

c) EPC Awareness and Climate Change:

On the topic of climate change, **32%** respondents said they were **very concerned**, **37%** were **concerned**, while **6%** were **not concerned** and **19%** remained **neutral**.

To examine whether environmental concern translates into greater awareness or interest in the energy performance of one's home, we checked the answers for respondents' level of concern regarding climate change and their awareness of EPC rating.

- 40% of respondents who knew their EPC rating were 'very concerned' about climate change and an additional 33% were 'concerned'. This suggests a strong correlation between environmental awareness and engagement with energy performance in one's living space. It indicates that those who are more environmentally conscious are more likely to take steps to understand and may be potentially more active in improving their home's energy efficiency.

Section 3: Sustainable Practices and Energy Consumption Adaptations

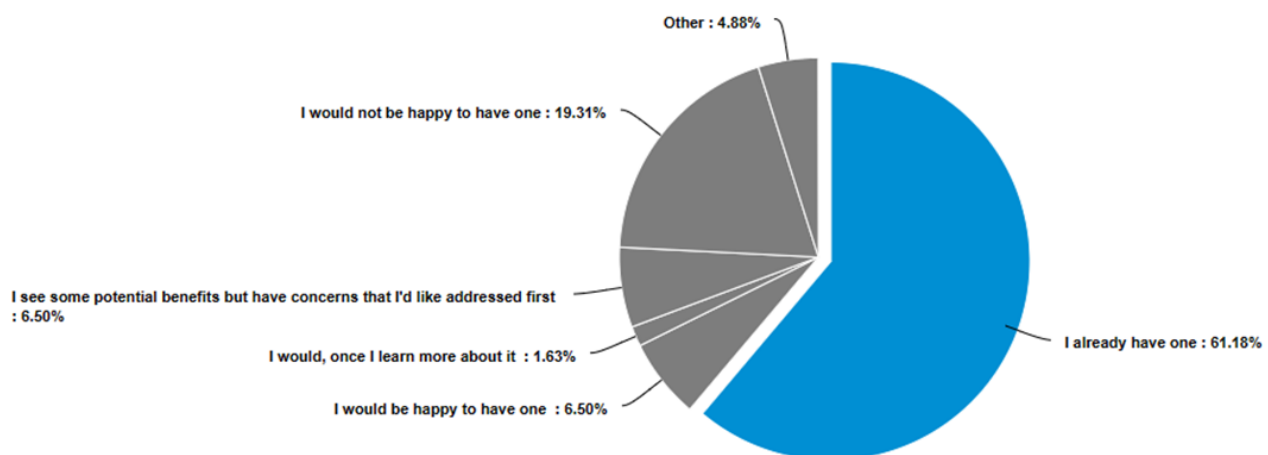
In our ongoing efforts to understand and enhance the living standards of tenants in Wales, our survey focused on the adoption of tools that promote sustainability and cost efficiency in daily living.

Specifically, we asked about the interest in smart meters - which track and manage energy usage - and water butts, which aid in conserving water.

These technologies are crucial in helping tenants reduce their utility costs and minimise environmental impact. Additionally, these questions also reflect broader objectives outlined in the *Welsh Housing Quality Standard (WHQS)*, which supports the integration of sustainable and energy-efficient practices in social housing.

Smart Meters

When examining the responses regarding the adoption of **smart meters** 61% of respondents already have one.



This question presented a variety of options as outlined above.

- 7% welcomed the idea of installing a smart meter.
- Another 2% were interested but wanted more information first.
- Additionally, 7% recognised potential benefits but had concerns they felt needed addressing.
- However, 19% of these respondents were not in favour of installing a smart meter.

It is worth noting that the 5% 'other' category mainly consisted of responses such as: 'I'd like one but can't for X reason; (on reflection, that should have been a clearer option).

However, there was also some interesting insight into other barriers.

Installation Challenges

"They will not fit in the meter room of this building."

"Was informed by Eon electrician my board is in the wrong place and there wasn't sufficient room for one."

"Have been told I cannot have one fitted due to the electric board being in the wrong place."

"I cannot unless my housing association change the wiring set up."

"My energy is under a communal network so I can't."

"There is no room to put one."

"I've had an electric one but they've refused to change my gas meter due to where it is."

"Smart meters don't work in all flats in this building as the meter store is some distance away from the flats, too many thick walls prevent the signal from moving additionally tenants don't have access to the meter store."

Technical and Operational Issues

"I have a smart meter but still have to submit readings because of poor communication."

"I have one, but it doesn't work for the gas fuel just the electric."

"One has been installed in my property, but I have no way of monitoring usage."

"I already have one, but it stopped being smart due to British Gas software issue."

"I have one for electricity but as gas is LPG, there isn't a meter available."

"Had one previously and gave false readings and problems topping up credit."

Contractual and Policy Restrictions

"I cannot get one because my tenancy contract says I cannot change things with the meters."

Connectivity Issues

"My Wi-Fi is not strong enough for signal."

General Discontent and Misunderstandings

"I am not happy with a smart meter that I cannot access."

"I have a smart meter! Unfortunately, I do not understand how it works."

When we look at Smart Meters in more detail:

- Supported Housing tenants lead with a significant 67% already equipped with smart meters. Social Housing was 63%. Contrastingly, private landlord tenants show the lowest adoption rate at 54%, highlighting a notable gap in technology uptake between different housing sectors.
- Interestingly, private landlord tenants also demonstrated the most openness towards smart meter installations, with 27% either interested in learning more or having specific concerns they want addressed. This level of interest is substantially higher than that observed among Housing Association (12%) and Local Authority tenants (11%)
- Tenants with disability showed responses consistent with those of the total responders with no significant variations.
- Black & Minority Ethnic responders were 50% less likely to have a Smart Meter already installed compared to average responses but showed the highest level of positivity towards having one installed.
- Over 60s were most likely to say they did not want one installed (26% did not want one compared to 19% for all responders)
- Under 30 had the lowest resistance to having a Smart Meters installed; only 10% were resistant compared to 19% for all responders.

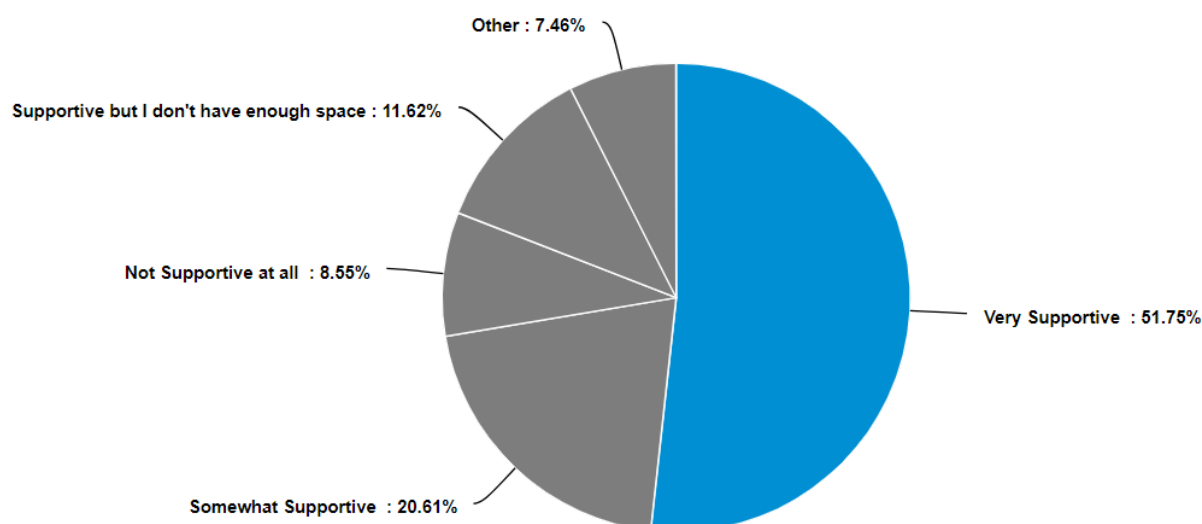
Water Butts

A water butt is a large barrel for collecting rain as it flows off a roof especially from a drainpipe. That water can be used for gardens. It is not for drinking.

Installing Water Butts are also a feature of WHQS2023. And we wanted to test people's attitudes to them.

The 3 takeaways are -

- **A significant majority (72%) expressed support for installing Water butts,** stating they were very supportive/somewhat supportive.
- In retrospect, we should have offered an option for 'Already had one' as the 7.5% other in the graph was predominantly people saying they had one.
- **Only a small minority, 9% were not supportive at all.**



However, challenges such as space constraints were noted, with 12% supportive of the idea but limited by insufficient space.

Think point - This feedback highlighted a strong general willingness among tenants to engage in water-saving practices, but for wider roll out practical considerations like space availability must be addressed to fully implement such measures.

When we look at this in more detail:

- Social housing tenants who are older, are more supportive of the idea of Water Butts

- PRS tenants were less interested at first glance, but this was partly driven by much higher levels of 'interested but don't have any space' (20.5% compared to 11.5% for total responses)
- Similarly, Under 30s had similar views. 25% said 'interested but they didn't have space' compared to 11.5% for total responses.

Like the question on Smart Meters, if respondents chose to respond 'Other,' we gave them the opportunity to expand on their thoughts and opinions with a comment box. A key theme emerged around the reluctance to use rainwater collection systems due to shared living spaces, maintenance concerns, specific health risks such as legionella, and lack of personal utility or interest.

Practicality and Usability Concerns

"Other tenants in the building would make it unusable/highly ineffective."

"No space."

"No use. I live in a second-floor apartment and have no private garden space."

"I have no idea what you'd want me to do with one, but if it's watering plants."

"Garden is small and how much looking after would it take?"

"No outside space."

Shared Spaces and Management Issues

"The garden is shared with another tenant, so I don't use the garden, because of this I've no interest."

"Too many problems with shared areas anyway, undisciplined children/spiteful adults etc."

"The main reason is that the garden is shared with whatever tenant rents the upstairs flat at a time, not always pleasant ones."

Cost and Responsibility Concerns

"Costs being passed to tenant even if covered by other means."

"An increase in flies, extra work for tenants cleaning them and draining them regularly if the water isn't used."

"Just an extra issue for [X RSL] not to attend to."

Utility and Necessity Concerns

"What would I use that water for? My garden does not require watering and such water is not potable."

"We had one in our garden a very long time ago, but it got stolen and we never got another one."

Health and Safety Concerns

"Heating up and stagnating during hot weather in the summer."

"How do you manage legionella risks if you are providing them?"

Not fully understanding what they are used for/benefits

"Because rainwater hasn't been treated and cleaned for use in home."

"I suffer from IBS-D and would be very worried that I would not be able to afford additional amount of water for toilet flushing and laundry that my home uses now."

"The costs for water are the least of all the monthly bills, and I use very little water - I am very careful."

Section 4 – Decarbonising homes/NetZero/Affordable Warmth

Background

The Welsh Housing Quality Standard introduced last year also incorporated objectives aimed at achieving NetZero in Wales. With the introduction of WHQS in the social sector, our aim was to assess tenants' awareness of both current and future initiatives.

Retrofitting in Wales poses challenges due to aging housing stock. Depending on the required improvements, properties may necessitate new radiators, upgraded windows, insulation work, and more. While this work aims to enhance energy efficiency and reduce energy bills, it can be time-consuming and disruptive for residents.

Landlord communication with tenants on Net Zero

TPAS Cymru has already seen landlords taking innovative routes of communication and engagement with their tenants, so we wanted to understand what form of communication has been most used.

a) Net Zero Communication with Landlords

First, we asked survey respondents to tell us if their landlord had communicated with them about Net Zero/decarbonisation works that might be done.

The question was:

Has your landlord communicated with you about NetZero or works that may be done to make your home more energy efficient?

Takeaway - 88% of total respondents answered that they had **not** received any communication from their landlord. This is an increase from last year by 2%.

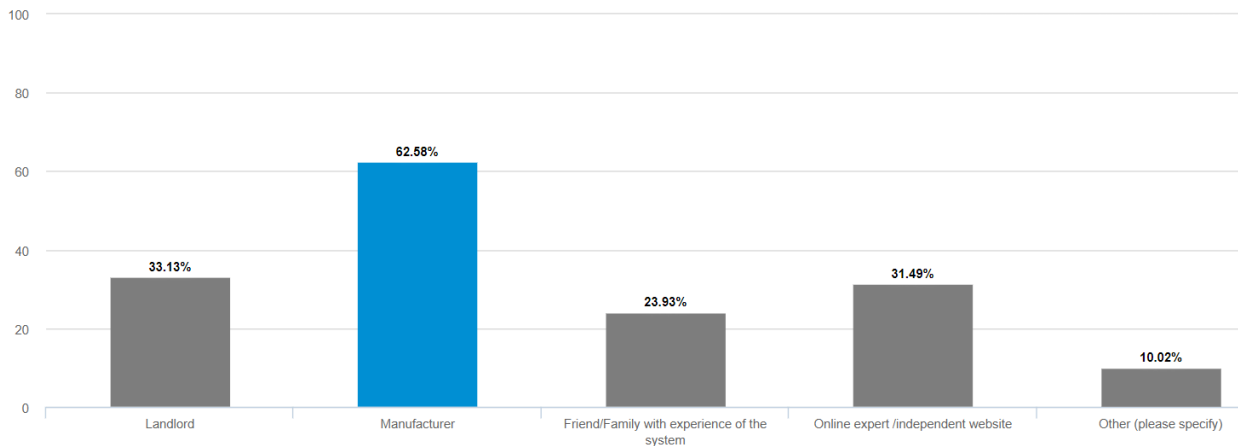
Upon closer examination of the 12% who had received communications:

- **Housing Association and Local Authority tenants** had the highest percentage of respondents who answered 'yes,' with 14% saying that they had received some communication with their landlord regarding NetZero works.
- Tenants in the **private rented sector** had the lowest percentage with only 7% stating that they had received Net Zero communications.
- **Older tenants** tended to have seen these communications with tenants aged 31-44 scoring the lowest at 6.5%.
- The **highest response**, at 24% came from Black & Minority Ethnic renters who reported having seen NetZero communication.

b) Different Types of Communication

Transitioning from gas heating to electric-based heating will require significant effort for tenants to understand these new systems and utilise them effectively. We were curious to learn whom tenants trust most to explain the use of new heating systems in their homes.

The question asked was: *If you were to have a new heating system in your home, who would you trust to explain how to use it? (can select more than one)*



(Reader Note: As respondents could select more than one option, the percentage above do not total 100%. Therefore, a bar graph is more suitable than a pie chart.)

63% would rely on the **manufacturer**,
33% trust their **landlord**,
31% would consult an **online expert or independent website**,
24% trust a **friend or family member** with *experience of the system*,
and **10%** mentioned **other sources**.

Taking a closer look at the trust issue:

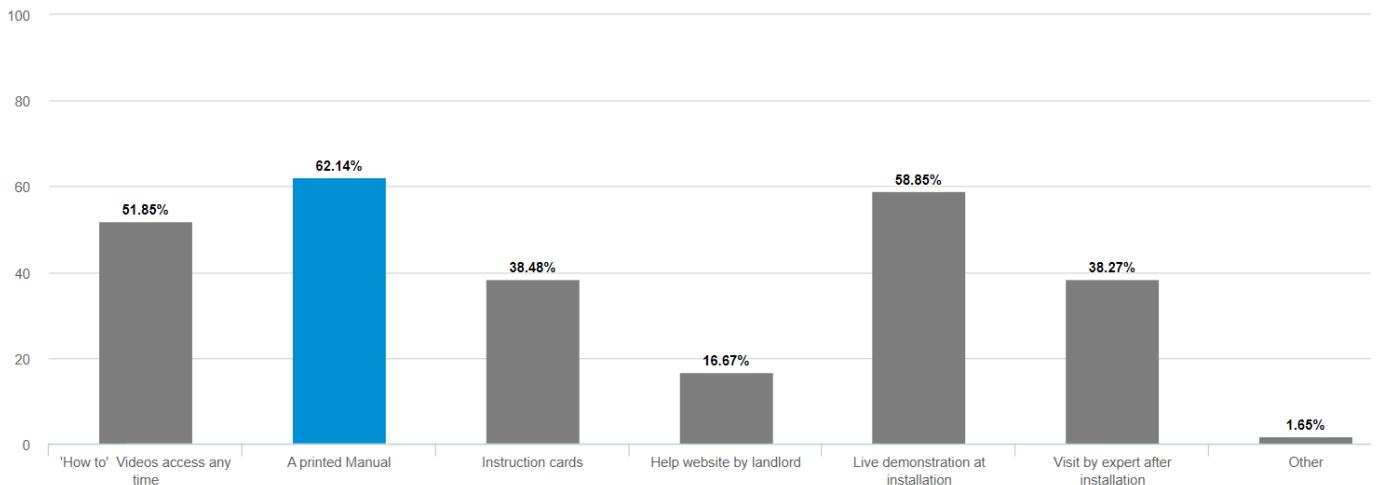
- **Older/ social housing tenants/tenants with disabilities** were more likely for match the graph above, having the most trust in landlord/manufacturer.
- **Under 30s** had very little trust in landlords doing this role (14% compared to 34% for all responders)
- **The under30s** score a significant 63% preference for online expert/independent website compared to 31.5% for all responders.
- **Black & Minority Ethnic tenants** have lower level of trust in landlord and had higher levels for 'Friend/Family with experience' (31% compared to 24%) or 'using an online expert'. (38% compared to 31.5)

c) Understanding New Heating Systems

In our follow-up, we asked tenants about the types of information they find most useful for using new home heating systems effectively.

Understanding new technology can be challenging, so we aimed to identify the most valuable resources and guidance.

Question asked: *What type of information would you find useful regarding 'How to use a new home heating system' (can select more than ONE)*



Out of the total number of respondents, there was a preference for traditional handover engagement.

- **62%**, favour a **printed manual**, indicating a strong preference for tangible, readily accessible reference material.
- Following closely, **59%** of respondents value a **live demonstration** at the time of installation, which suggests that interactive and real-time learning methods are highly effective.
- However, **online resources** are also popular, with **52% of respondents** appreciating 'How to' videos that can be accessed at any time, offering flexibility in learning.
- Less conventional but still notable, **38%** prefer **instruction cards**.
- **8%** find **a visit by an expert after installation** helpful, underscoring the desire for follow-up support.
- In contrast, **only 17% see a help website** provided by the landlord as useful, indicating a lower preference for this type of support.

When we look at this in more detail

We noticed clear differences in learning preferences across age groups.

- Younger tenants, aged **18-30**, overwhelmingly **prefer digital resources**, with 83% choosing 'How to' videos.

- In contrast, **tenants over 60** tend to **like traditional learning methods** more, with **66% opting for printed manuals** and **57% favouring live demonstrations**—the highest of any group.
- This older group also shows a **growing preference for personalised, hands-on support**, as seen in their increased interest in post-installation expert visits. Although help websites are generally less popular, they find slightly more favour with the oldest tenants, at 19%.

2021 and 2024 Comparison

The comparison between 2021 and 2024 data reveals notable shifts in trust sources and learning preferences among tenants regarding new heating systems. **While trust in manufacturers remains consistently high**, with a slight increase from 61% to 63%, there has been a **modest increase for trust in landlords**, rising from 26% to 33%. Conversely, **trust in friends or family members decreased slightly** from 29% to 24%.

Learning preferences have also evolved, with a **significant increase in the preference for face-to-face demonstrations by manufacturers**, improving from 47% to 59%. Additionally, there has been a substantial rise in the preference for jargon-free 'how-to' manuals, increasing from 30% to 52%.

(Note: if respondents chose to respond 'Other,' we gave them the opportunity to expand on their thoughts and opinions with a comment box.)

Comments:

"PDF manual

Friends

We had new systems which were fully explained.

Not everybody can access the web, not everyone can read, so simple demonstrated and instructions.

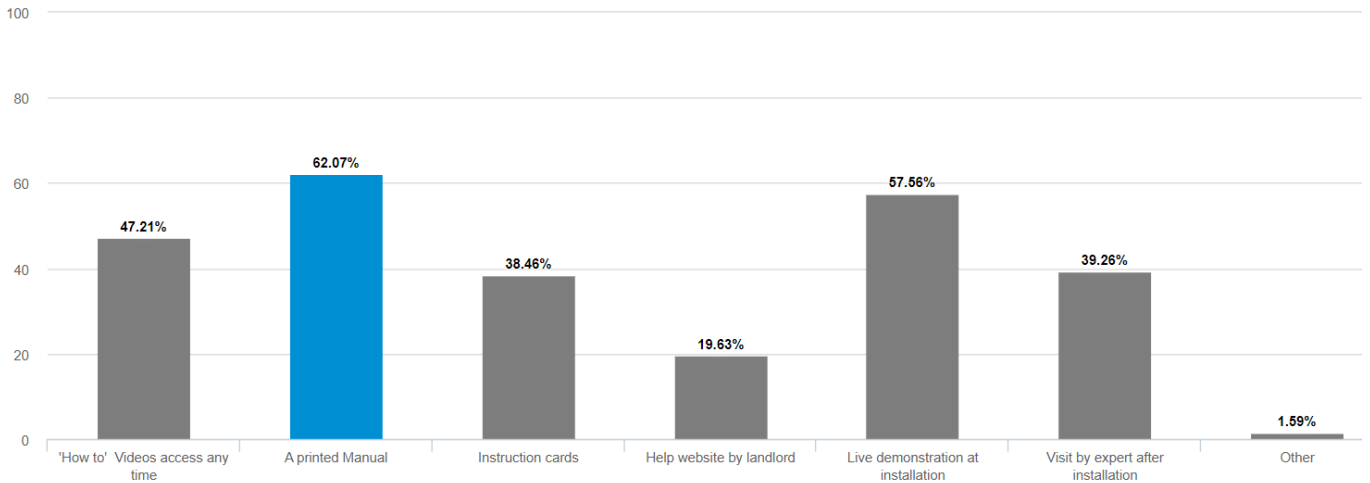
I Worked with heating systems and renewed most of the system in my Flat???"

What about Social tenant's v's private renters?

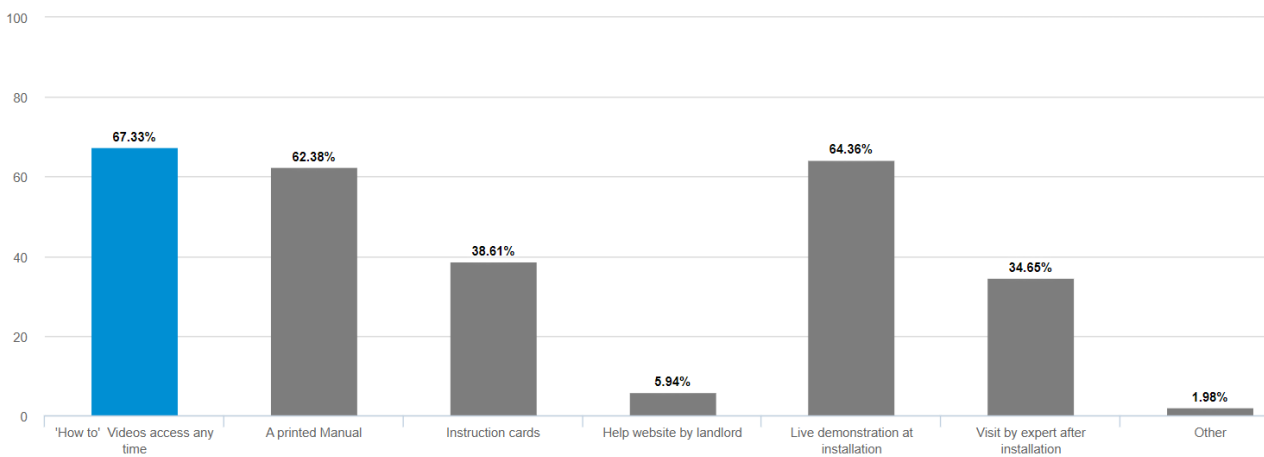
There was a lot of similarity, but the key difference emerges with the following -

- Social tenants have more faith in a landlord help website, and private renters have more faith in 'How to' videos.

• Private renters



• Social housing tenants



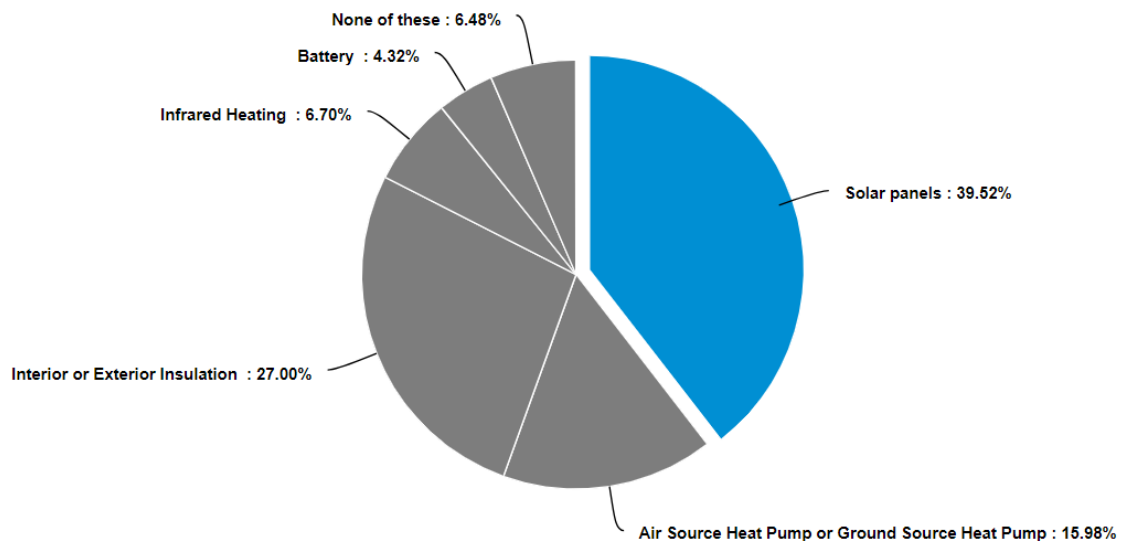
d) Tenant Preferences for Future Heating Systems

Upcoming efforts in Wales will include installing new heating systems and making thermal improvements. These changes are key to reducing energy bills and achieving affordable warmth. We asked respondents which upgrades they would prefer in their homes over the next decade, aiming to better understand their preferences.

Note 1: This question presented pictures of affordable warmth technologies solutions and asked them which ones they were interested in?

We were looking for that unprompted, current awareness from tenants. It's worth noting that some may have limited knowledge or awareness of these technologies, which could influence their preferences and we expected a bias towards familiar solutions like solar panels.

Question asked - *Over the next decade, your home might have new heating system or thermal improvements to make your home more energy efficient. Which of these would you prefer to have in your home from the following:*



- **40%** of respondents favoured **solar panels**,
- **Interior or Exterior Insulation** was chosen by **27%**,
- **Air Source Heat Pumps or Ground Source Heat Pumps** by **16%** of respondents.
- In contrast, **Infrared Heating and Batteries** were less popular, selected by only 7% and 4% of respondents.
- Additionally, **6% of respondents** said that they **did not prefer any** of the options presented.

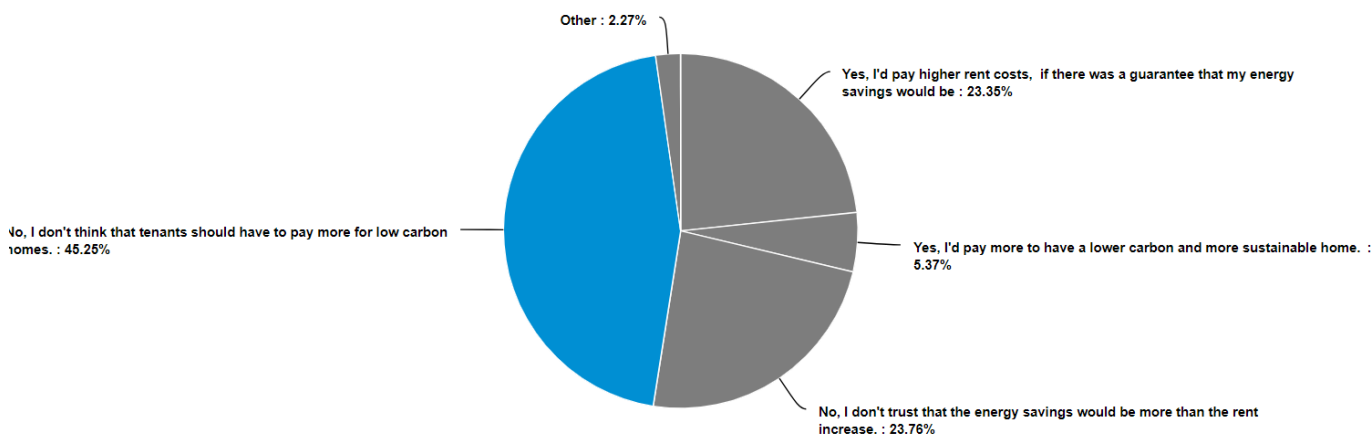
Funding of NetZero

During the NetZero training sessions that we run, the most common question is, **“Who is paying for NetZero?”**

A [report](#) by Future Generations Wales found that £14.75 bn is the total investment needed by 2030 to retrofit all homes in Wales. There are different solutions that have been raised by government officials and the housing sector, some including the **raising of rents** or **more funding** from Welsh Government.

In theory, if a home is more energy efficient, tenants will be left to pay less in energy costs, but there is still scepticism around this. We wanted to see if respondents feel comfortable paying increased rent for a low energy cost home.

Question asked - *Converting an existing home into a low-cost energy home is an expensive process. Would you feel comfortable paying increased rent for a low energy cost home?*



Think point: These results will be disappointing for Affordable Warmth advocates.

Out of the total number of respondents,

- **23%** said yes, they **would pay higher rent if there was a guarantee** that their energy savings would exceed the rent increase.
- Only **5% agreed to pay more for a lower carbon** and more sustainable home.
- Additionally, **24% expressed distrust** that the energy savings would outweigh the rent increase, and
- **45% opposed** paying more for low carbon homes.
- Additionally, **2%** of respondents had **other** views mentioned below:

Concerns about Financial Impact

"My rent has just gone up 15% after solar panels installed."

"Yes, as long as it wasn't too much, I am on a fixed, limited income. Also, the landlord will benefit from the improvements that I have paid for after I have moved on or died, so they should pay most."

"I would need to see how much it would cost compared to how much it would save on energy price."

"Provided that the higher rent cost is covered by housing benefit."

Considerations before Decision

"Unsure, I think I'd want all the information before making a decision. Some alternatives can take space from an already small home. I'm also concerned about greenwashing methods plus the change meaning you're out of control of switched on time and so on."

"The heating is not the problem here for reducing energy. It's the windows that is the issue. The windows are very old metal frames with very thin double glazing, so not efficient."

Attitude Variation

We found notable differences in attitudes towards paying more for low carbon homes across various housing types.

- In Housing Associations, nearly half of the tenants, 47%, are opposed to paying more.
- This sentiment was slightly less strong among tenants in Local Authority, with 38% against,
- and even more pronounced in the Private Rented Sector, where 49% were opposed.
- In contrast, tenants in Supported Housing showed a more balanced view, with 40% opposed and 20% in favour of paying more.

Age Variation

- Regarding age differences, younger tenants aged 18-30 were more willing to pay higher rents for energy savings, with 39% supportive if the savings exceeded the rent increase.
- This enthusiasm for sustainable living appeared to decrease with age, with 27% of those aged 45-60 and 21% of those over 60 still willing to pay more under the same conditions.

Final Question we asked – why not join the conversation!

We asked:

If you've had or are aware of NetZero/Energy Efficiency works done, or coming to your home, would you be interested in participating in one of our renter focus groups?

	Renters who signed up
YES, I'd like to join a group for Tenants who've had energy efficiency work done at their home	78
YES, I'd like to join a group for Tenants who have an interest in low carbon housing.	107

Conclusion

The 2024 Tenant Pulse Survey by TPAS Cymru has once again provided invaluable insights into the challenges and perspectives of tenants across Wales, particularly regarding energy efficiency, sustainability, and the transition towards NetZero. This year's survey highlights a crucial theme: while there is a noticeable interest in sustainability initiatives, some barriers prevent their full acceptance and integration into everyday living.

Lack of awareness around EPC

The awareness around energy performance certificates (EPC) showed that whilst tenants were aware of what the chart looks like, the majority of respondents did not know what their own rating was, and most tenants guessed their EPC rating was a D or E. Energy efficiency is directly linked to energy costs, so it can be beneficial for tenants to know what contributes to an EPC rating and how it impacts their own home and bills. Tenants would benefit from a greater awareness of the government website for people to look up their property's EPC rating, as currently this is not being utilised by tenants.

Challenges with Smart Meters and Water Butts

The adoption of smart meters and water butts showcased both strong interest and a touch of scepticism. Barriers such as installation difficulties, technical issues, and specific concerns like legionella risks in water butts emphasize the need for better support systems and clearer communication to overcome practical obstacles and health concerns.

Tenant Concerns

Landlord communication with tenants on NetZero contributes to the success of the goal, as tenants will be living with these systems and operating them day to day. Though there is an overall assumption that tenants are not interested in NetZero, this report revealed a different reality, with an increase from 122 to 185 tenants answering that they would like to be included in a TPAS Cymru led tenant focused group. Going forward, TPAS Cymru will run tenant focus group around NetZero.

Communication, Communication, Communication

Throughout the survey, it is evident that while most respondents support decarbonisation efforts, and a significant number simply require more information. Many are not opposed to these initiatives but express a need for practical demonstrations and clear instructions.

It's not a one size fits all communication, and we need to take it into account varied age, cultural and demographic backgrounds of all the tenants. As a sector, we need to do better. To effectively engage and reach all the tenants. TPAS Cymru can help tenants and landlords do this.

Listening and Engagement

Landlords need to listen to tenants as they know their homes *"The heating is not the problem here for reducing energy. It's the windows that is the issue. The windows are very old metal frames with very thin double glazing, so not efficient."*

Recommendations

Landlords and tenants should work together to create a roadmap for communicating about WHQS, NetZero, affordable warmth. This plan can be built on the best practices from within and outside the sector.

To ensure energy efficiency benefits, landlords should collaborate with tenants to develop helpful material. These resources should guide tenants in maintaining energy upgrades even after the installation is complete.

Partnerships are needed with responsible organisations to deliver comprehensive technical support and clear guidance to tenants regarding the installation and advantages of smart meters and other energy-efficient technologies.

Address the practical challenges of installing water butts especially in shared living spaces. Solutions could include smaller, more adaptable technologies tailored to the specific needs of tenants.

Communicate the economic benefits of affordable warmth programs to tenants and the local economy. Show how energy savings can help reduce any potential rent increases. Offer more real examples and case studies.

Organise regular workshops or seminars that focus on practical aspects of affordable warmth. Additionally, create opportunities for tenants and staff to learn more about the forthcoming challenges in decarbonising housing.

TPAS Cymru is here to support you in implementing the above findings and recommendations.

We are here to support you!

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 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:

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

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