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TENANT VOICE ON ENERGY EFFICIENCY AND AFFORDABLE WARMTH

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Chief Executive Foreword

Croeso and welcome to TPAS Cymru's fifth annual Tenant Survey specifically 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 many tenants said they would like to follow up this survey with 2 more in-depth Net Zero focus groups.

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 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.

"We can't afford to heat our homes properly, and when we do, the heat escapes through old windows."

— Tenant comment from the survey

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 comfortable level?
2. **Attitudes and Perceptions: What EPC Ratings Mean for Tenants** – Do tenants understand their home's energy efficiency rating? Does awareness of EPC ratings influence their housing decisions?
3. **Concerns Around Transition: What Tenants Worry About** – As homes shift from gas to electric heating, what concerns do tenants have? Are they being consulted and supported in this transition?
4. **Rent and Affordable Warmth: Striking the Right Balance** – How do tenants feel about the costs of making homes energy-efficient? Should rent be adjusted based on a home's energy performance, and what are the broader affordability concerns?

By focusing on tenant perspectives, this report provides insights into what's working, what's not, and what needs to change to ensure that **energy efficiency improvements truly benefit the people who live in these homes.**

Key Findings

- **Heating affordability is at a crisis level, with 70% of tenants reporting they are struggling to afford their heating costs.** Unlike last year, where older renters (60+) were most affected, this year's data shows a shift - **younger tenants (18-45) and Black Asian Minority Ethnic (BAME) (83%) now face the highest levels of unaffordability.** This highlights a growing financial burden on these groups.
- **EPC awareness has declined significantly, dropping from 29% to 21%.** The sharpest decline was among 18-30-year-olds (from 43% to just 14%), suggesting that awareness has decreased or that new renters have less access to EPC information.
- **EPC perception vs reality:** Most tenants accurately perceive their home's EPC rating, but some are misinformed. 82% correctly identified their EPC, while 14% overestimated it (believing their home was more efficient than it is) and 4% underestimated it. This indicates a small but notable gap in understanding of their home's energy performance.
- **Windows and insulation remain a major concern for tenants.** Many reported draughts, heat loss, and outdated, poorly sealed windows as significant issues. Tenant feedback repeatedly pointed to structural inefficiencies - not just heating costs - as key factors keeping homes cold and unaffordable to heat.
- **The transition from gas to electric heating is a major concern,** with tenants worried about higher costs, power outages, and a lack of choice - especially in social housing, where many feel excluded from decision-making. Older tenants also raised concerns about the complexity of smart energy controls, highlighting the need for better usability and support.
- **No rent hikes for inefficient homes:** 81% of tenants (and 97% of private renters) say landlords should not raise rent on homes rated EPC E or lower until those homes are improved. This highlights the expectation that landlords take responsibility for making homes more energy-efficient before increasing costs for tenants.
- **Scepticism about rent increases for energy-efficient homes:** While improving energy efficiency is a priority, only 27% of tenants support paying higher rent for homes with better EPC ratings. Many remain unconvinced that

any energy bill savings would outweigh the increased rent, reflecting broader concerns about affordability and trust in the rental market.

- **A lack of choice in the housing market forces many tenants to live in cold, inefficient homes.** Several respondents highlighted that limited housing availability prevents them from prioritising energy efficiency, with some saying: *"Choice isn't an option when you are faced with homelessness."*
- **Despite energy efficiency improvements, tenants are not seeing clear financial savings.** Only 18% reported lower energy bills, while 52% saw no difference, and 30% were unsure. Older renters (60+) and BAME respondents (25%) reported the highest savings, suggesting a need for clearer communication on the long-term cost benefits of energy efficiency upgrades.

Author: Akshita Lakhiwal
Supported by: David Wilton
Promoted by: Eleanor Speer

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 really grateful for this landlord and community support.



- This survey was also promoted via the TPAS Cymru social media channels.
- 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 reached 195,349 people over the entire campaign.
- 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.

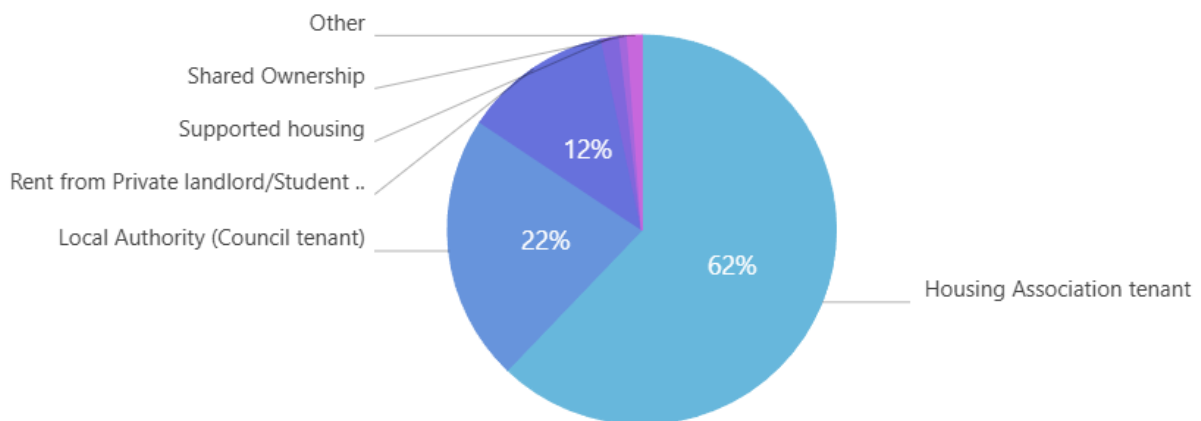
Demographics of respondents

Under the TPAS Cymru Tenant Pulse branding, TPAS Cymru conducted a survey in January 2025 using the Tenant Pulse platform. The survey included 20 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

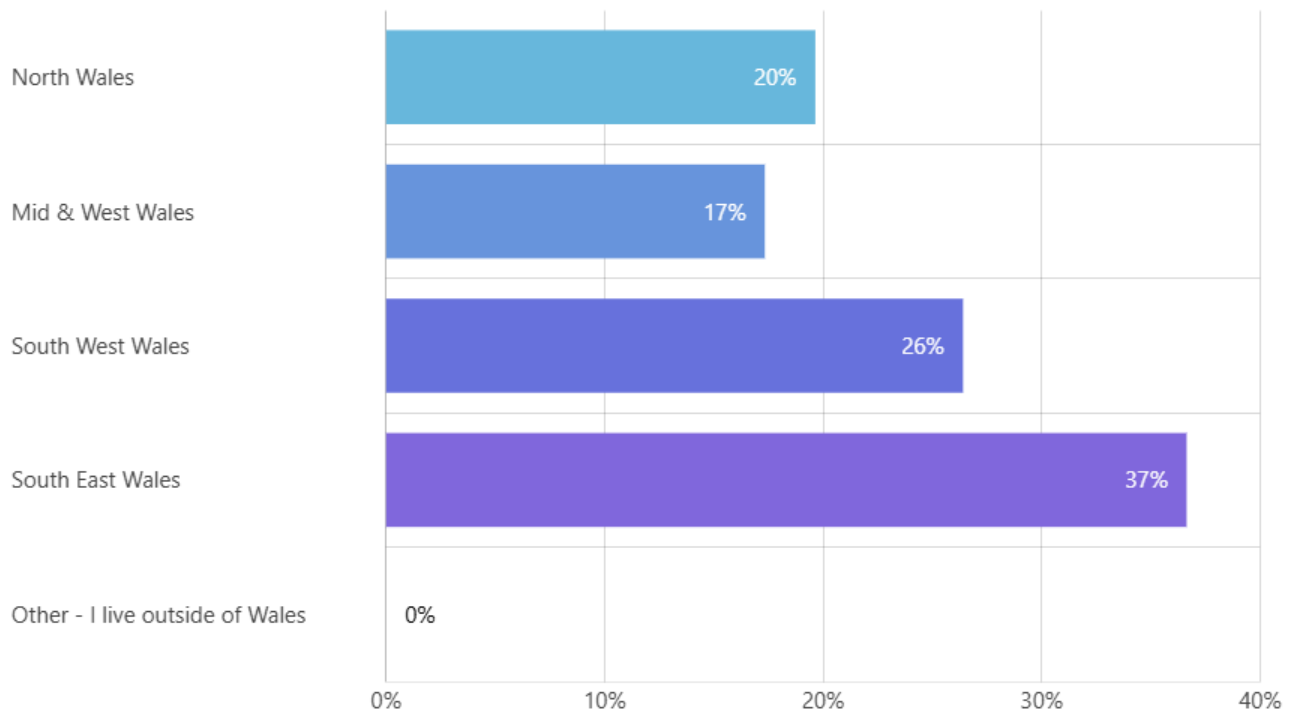
A total of 613 tenant respondents.

Breakdown of the type of Tenants/Renters responses



This year, responses from tenants in Local Authority housing decreased compared to the previous year (25%). However, responses from Housing Association tenants increased to 62%, up from 52% last year. Meanwhile, 12% of respondents were from the Private Residential Sector (PRS).

Responses by Region

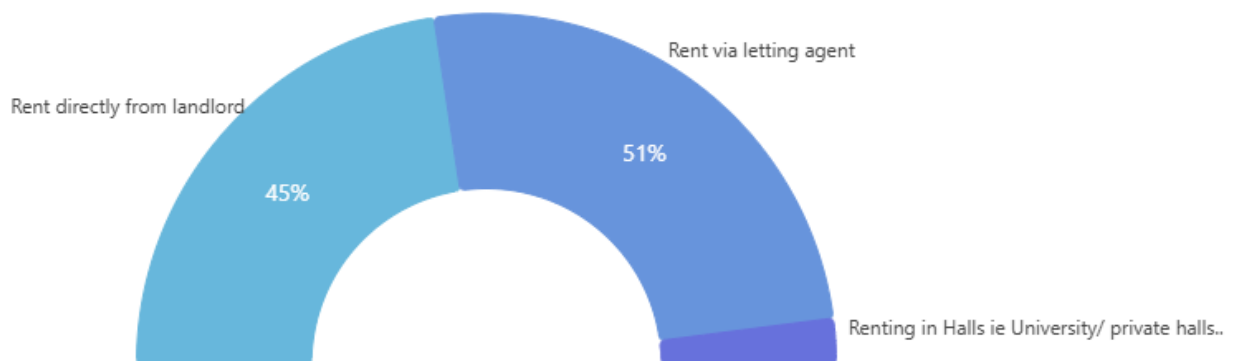


As in previous surveys and in line with overall housing stock distribution in Wales, the highest number of responses came from South East Wales (37%) and South West Wales (26%).

Respondents self-identified their region, as no boundary guidelines were provided. In terms of age distribution, the youngest respondents—those under 45—were primarily from South East Wales.

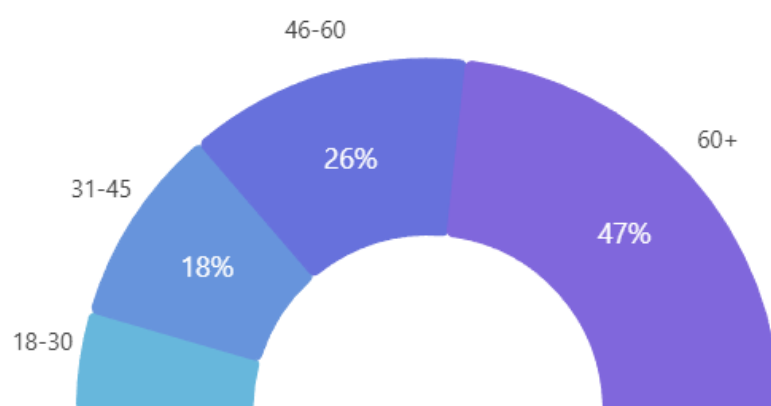
Private Renters Breakdown

We also asked Private Residential Sector (PRS) respondents about their rental arrangements. Of these, 44% rented directly from a landlord, 51% through a letting agent, and the remaining from a university or private halls. This fairly equal split helps us understand different tenant experiences.

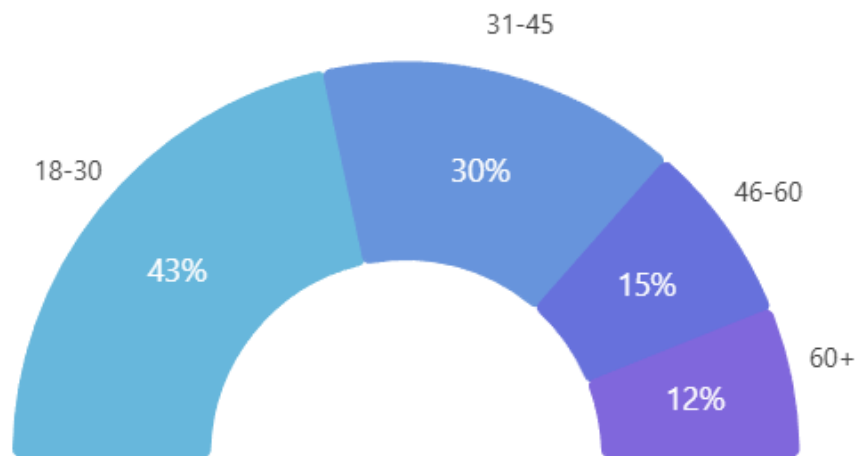


Age Groups

The age breakdown of respondents shows a strong representation from older demographics, largely driven by social housing tenants. In contrast, private renters were more evenly distributed across age groups. However, there was an improvement compared to last year, with responses from the 30-45 age group increasing by 3% and the 18-30 age group by 5%.



However, when you look at the age breakdown in the **private rental sector**, you see a stronger response level from younger people. (Chart below)



Age demographics vary significantly between social and private renters. Only 4% of social housing respondents were aged 18-30, compared to 45% in the Private Residential Sector (PRS).

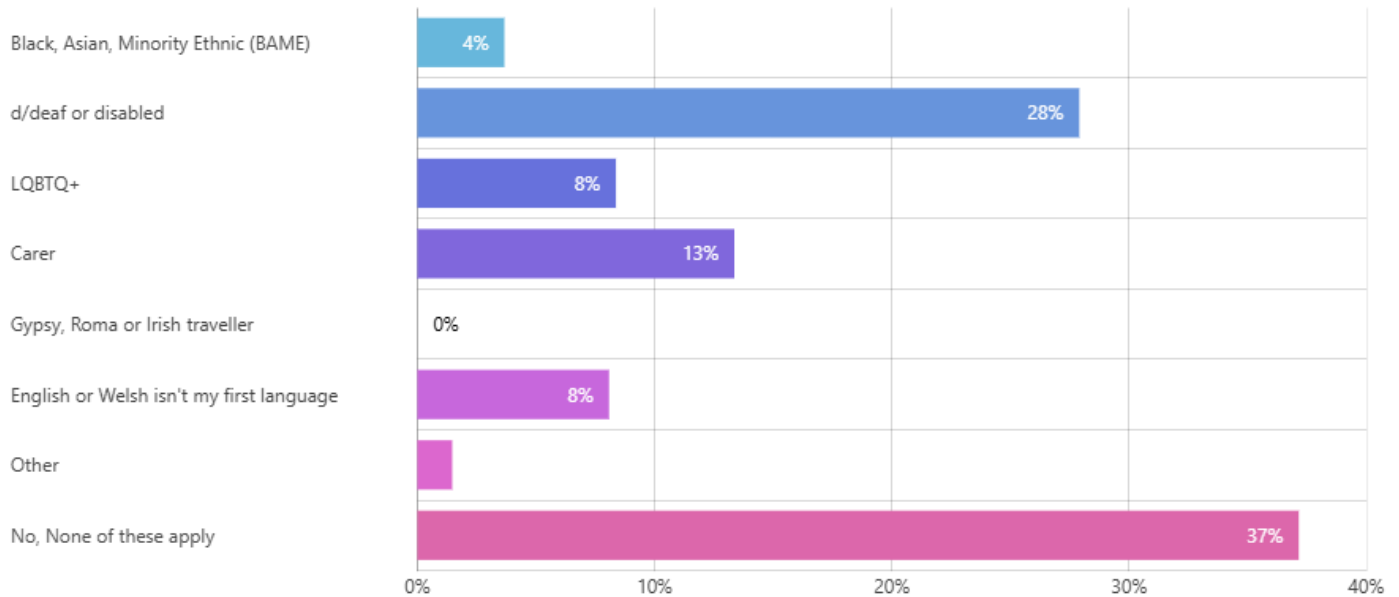
Overall, the 2025 survey reflects a more balanced distribution across age groups compared to 2024, aligning with TPAS Cymru’s goal of broadening engagement through the Tenant Pulse platform.

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)



4% from all the respondents who responded overall identified as having a Black Asian Minority Ethnic (BAME) background. This is a slight decrease of 1% compared to the 2024 Net Zero Survey.

The highest responding group in this survey was d/Deaf or disabled tenants, making up 33% of respondents.

- Among those identifying as d/Deaf or disabled, 66% live in Housing Association properties, while 5% are in the Private Rental Sector (PRS).
- Responses were distributed across all four regions, with the lowest participation from Mid and West Wales. The regional breakdown of responses was: South East Wales (38%), South West Wales (24%), North Wales (21%), and Mid/West Wales (18%).

16% of tenants in private rental housing identified as being from a Black, Asian, or Minority Ethnic (BAME) background, reflecting a 3% increase from last year.

Other key findings among respondents identifying as BAME include:

- 48% lived in the Private Rental Sector (PRS).
- 52% were based in South East Wales.
- 40% were aged between 31-45.

TPAS Cymru remains committed to working with staff, tenants, and communities of social landlords to ensure broader representation in future Tenant Pulse surveys. To better understand these perspectives, every response from individuals identifying in this group was personally reviewed by the lead author, both individually and in relation to the overall response data.

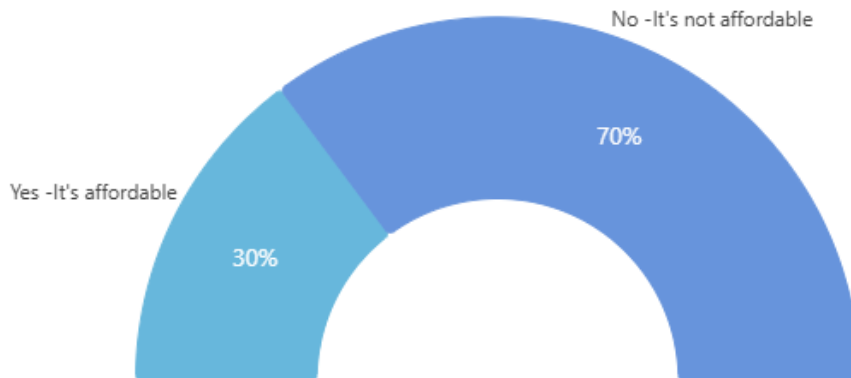
Section 1 - Heating Affordability: The Cost of Staying Warm

Every tenant deserves a home that is warm and comfortable for their needs. However, rising energy prices have made this increasingly difficult, leaving many tenants struggling with cold homes and growing energy debts. Heating costs can place a significant financial strain on tenants, affecting both their budgets and overall well-being.

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

Q. Would you say that the running costs of your heating is affordable?

- 70% of respondents said their heating costs were **unaffordable**.
- Only 30% considered them **affordable**.



When we look in more detail:

Unlike last year, when older respondents (60+) were the most likely to report heating costs as unaffordable, this year, younger age groups (18-45) reported the highest levels of unaffordability.

- **Age 31-45:** 81% found heating costs unaffordable.
- **Age 18-30:** 70% reported unaffordability.
- This marks a significant shift from last year, when the youngest group (18-30) had the lowest unaffordability rate (47%)
- Younger tenants may live in less energy-efficient housing, especially in the **private rental sector**, leading to higher heating costs.
- Older age groups also reported high unaffordability:
 - **Age 45-60:** 70%
 - **Age 60+:** 66%

Underrepresented Groups - Black and Minority Ethnic Renters

- A notable increase was seen among **Black and Minority Ethnic renters**, with 83% reporting heating costs as unaffordable, up from 59% last year. This highlights heating affordability as a widespread issue across age groups and communities.

Energy Price Increase

- At the time of writing, Ofgem has announced a **£110 (6%) increase** in the energy price cap from April, marking the third consecutive rise.
- The average **dual-fuel Direct Debit energy bill** in Great Britain will increase to **£1,849 per year**.
- In Wales, rates are even higher:
 - **North Wales:** £1,947 (highest in GB).
 - **South Wales:** £1,873 (3rd highest in GB).
- These rising costs are approaching **April 2022 levels**, when the Welsh Government estimated that up to **45% of households could be in fuel poverty**.

Regional & Housing Sector Comparison

- **North Wales has the highest energy costs in Great Britain (£1,947/year) and also reports the highest level of unaffordability (74%).**
- **South East Wales:** 60% reported unaffordability.
- The disparity suggests that localised energy efficiency programs in North Wales could help close the affordability gap.

- There was little difference between **private renters and social housing tenants** in their views on heating affordability:
- **Private renters:** 29% considered their heating costs affordable.
- **Social housing tenants:** 32% found heating affordable.

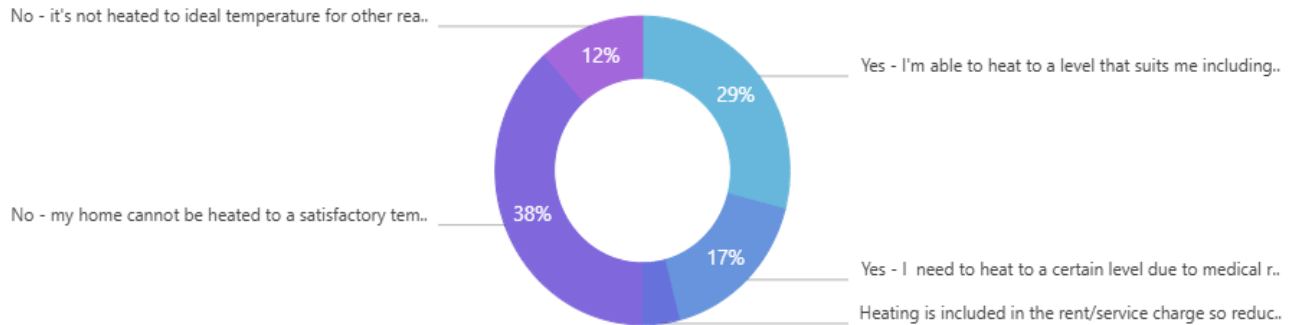
Q. Can your home be heated to an ideal temperature that suits you? (and any others living in your home)

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 about their heating situation.

Given the variety of living spaces, respondents were provided with several options:

- **29%** said they could heat their home to a comfortable level for themselves and others in their household.
- **17%** reported needing to heat their home to a certain level for medical reasons, including the needs of others in the household.
- **4%** stated that heating costs were included in their rent or service charge, so lowering the temperature did not result in savings.
- **38%** said they could not heat their home to a satisfactory temperature due to affordability.
- **11%** indicated that their home was not heated for other reasons, such as already being at an ideal temperature.

When we look in more detail:



PRS vs Social Housing Comparison below

PRS | Social Housing

Answer	Percent	20%	40%
Yes - I'm able to heat to a level that suits me including others living at the address	32.79%	<div style="width: 32.79%;"></div>	
	28.27%	<div style="width: 28.27%;"></div>	
Yes - I need to heat to a certain level due to medical reasons including others living at the address	4.92%	<div style="width: 4.92%;"></div>	
	19.2%	<div style="width: 19.2%;"></div>	
Heating is included in the rent/service charge so reducing the temperature makes no savings	6.56%	<div style="width: 6.56%;"></div>	
	3.16%	<div style="width: 3.16%;"></div>	
No - my home cannot be heated to a satisfactory temperature due to affordability.	36.07%	<div style="width: 36.07%;"></div>	
	38.82%	<div style="width: 38.82%;"></div>	
No - it's not heated to ideal temperature for other reasons	19.67%	<div style="width: 19.67%;"></div>	
	10.55%	<div style="width: 10.55%;"></div>	

PRS | Social Housing

- Young renters (18-30) are the most affected, with 50% unable to afford adequate heating.
- Policy efforts should focus on reducing rental costs or providing heating subsidies for this group.
- Among those aged 60+, 30% can afford adequate heating - 9% more than young renters.

60+ Years Old

- 30% of those aged 60+ can heat their homes adequately - 9% higher than 18-30-year-olds.
- While affordability remains a challenge, older adults have greater medical heating needs, making them especially vulnerable to rising energy costs.
- The 45-60 age group has the highest medical-related heating needs, while affordability issues remain critical for those aged 31-45.

Heating Affordability is a Health Necessity, Not a Choice

- Among d/Deaf and disabled respondents, **28% reported needing to heat their home to a certain level due to medical needs**, the highest of any group.
- This means that while affordability is a struggle for many, for disabled tenants, it directly impacts their health and well-being. Many also reported issues with **fixed heating settings that they could not control**, making affordability even more challenging.

Social Housing & Energy Affordability

- Social housing tenants face both the worst affordability issues and the highest medical heating needs, highlighting the need for targeted support programs.
- Private renters (PRS) may benefit less from energy cost relief measures if heating is included in their rent

Underrepresented Groups - Black and Minority Ethnic Renters

- **42% of BAME respondents** reported struggling with heating affordability - higher than PRS tenants (36%) and even social housing tenants (39%).
- This suggests **disparities** in energy affordability, likely linked to income levels, employment patterns, and housing conditions within these communities.

Section Highlights

- Affordability is the top issue across all groups, but it's most severe among BAME respondents (42%) and younger individuals. (50%).
- Medical heating needs are highest in the 45-60 age group (21%) and social housing tenants (19%).
- Social housing tenants have the worst affordability issues, even worse than private renters.
- This means that any intervention (policy, funding, or support) should focus on affordability relief for younger renters and BAME individuals, while prioritising heating assistance for older adults and social housing tenants due to medical concerns.

*In our interactions with diverse communities in **EYST**, many tenants shared that they had to use heating even when they couldn't afford it because they had children at home.*

We also gave an option for comments so tenants can elaborate more.

Key Tenant Comment Highlights

1. Inefficient Heating Systems
2. Draughty Windows and Poor Insulation
3. Landlords Ignoring Repairs
4. EPC Ratings Not Matching Reality
5. Heating Affordability vs. Energy Waste

Based on key themes we can divide them into:

1. Inefficient or Broken Heating Systems

- *New radiators have recently been fitted, but the boiler is not very efficient.*
- *Heater not working and can't afford it as all electric.*
- *The heating system that is installed is antiquated and run on oil. There is no control of the heat; it's either boiling hot or too cold. There is no proper thermostat control of heating in each room to conserve energy, and the only control is antiquated mechanical on/off switches on the radiators, so the rooms are either bone cold or too hot.*
- *Some of the radiator thermostats have not worked for years and apparently can't be rectified.*
- *I have had the heating engineers up again because on some days the temperature can drop to 4°C. They have again concluded the heating system*

is not fit for purpose—radiators are too small, full of rust, and have no thermostat on them. Yet again, [landlord] will do nothing. I have mold in the living room, bath, kitchen, and passage.

- *We have no heating upstairs and only expensive little electric radiators downstairs, which take hours to heat up a room and do nothing to heat upstairs. Reported every year to the housing association, but no action taken. Local councillor also tried raising it with them, but they never responded. All eight houses in the estate face the same issues.*
- *Can't seem to regulate the right temperature. No one explained how to time the unit or the best way to control the heating.*

2. Poor Insulation and Draught Issues

- *Windows and doors are very old, with drafts and gaps, so it never feels warm.*
- *Draught from windows.*
- *The windows and doors let out too much heat. One bedroom, in particular, doesn't heat up due to two windows that let in too much cold air.*
- *My windows really need replacing. You can hear the wind coming through, and when it's bad, you can't even hear the TV - that's how bad the whistling is. You can even feel the wind if you're sitting by the windows, so I know my heating is just going out through them.*
- *Unfortunately, due to the outdated windows in my property, which are over 30 years old, there are gaps in the windows that let in cold air and let out the heat. My home cannot be heated to a satisfactory standard because the heat seeps right out of the windows.*
- *My windows are old and draughty. Two of my bedroom windows can't shut. My front door is very draughty, and [landlord] has told me I can pay for a new one for £500, even though I have lived here for 25 years and it's the same existing door! My radiators don't heat up properly. The back door fits poorly and is also draughty.*
- *Affordability is a huge issue, but that's due to a lack of insulation. The cavity wall insulation was removed by [landlord] about 8-10 years ago on the premise that it was causing damp issues, and the flats would soon be enveloped with exterior insulation material. This has never happened, and despite yearly promises of "it will be done," it never has. Living in a pre-1960s cold flat on Gower with expensive LPG to keep you warm is not doable.*

3. EPC and Structural Problems

- *My EPC rating is F in a Grade 2 listed property with no insulation and very old 'double glazed' windows. I have an oil boiler and inefficient radiators and a wood burner. The temperature never reaches the required ideal level.*
- *Think it showed as C in my handbook when I moved in, but it's freezing in winter even when the heating is on.*
- *My EPC has expired, and the last grade was D, but the property does not retain heat.*

4. Tenant Experience & Landlord Inaction

- *The heating settings are fixed and cannot be altered.*
- *We could probably technically afford to heat the home to sufficient warmth year-round, but this feels wasteful as the house loses heat so quickly. So it is a balance of comfort vs. feeling wasteful.*
- *You don't know the problems until you are in the property, and when you inform them, they do nothing to resolve it.*
- *EPC means nothing if local councils can't afford to improve properties.*
- *EPC would come after good repair, accessibility, and location.*
- *The parking is limited, and the council refuses to turn the green areas into extra parking. Love where I live, but hate what I have to live in.*

5. Draughty and Inefficient Building Designs

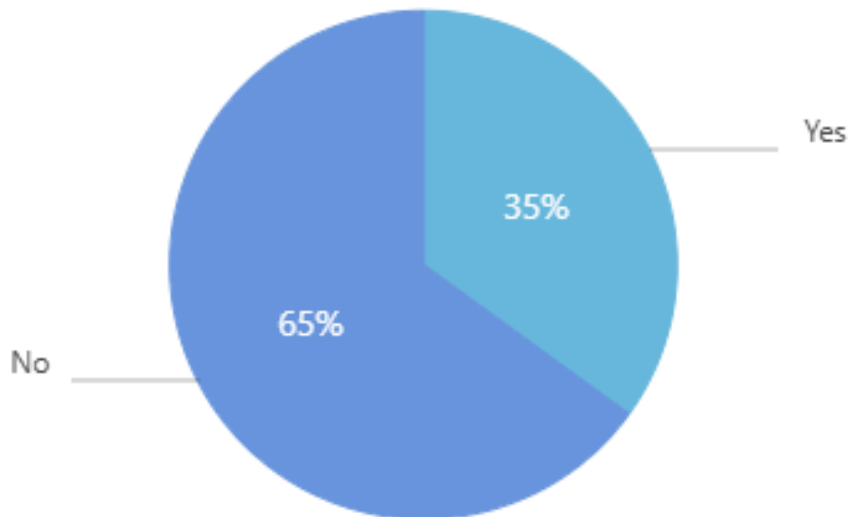
- *The windows are busted, and so the heat escapes out really easily.*
- *My flat is incredibly draughty. I can heat my flat up, and the living room gets warm until the main door to the building is opened downstairs, and the wind and draught blow straight up the stairs, under the flat front door, into my flat, and down the hall straight into my living room. The living room itself has two vents that take in wind from the rugby field into the living room and cancel out any heating.*
- *My heating system is outdated, and my home suffers from rising damp that has existed for over 15 years. Any improvements do not have the full impact.*

Q. Has your home had any energy efficiency improvements? For example - External Wall Insulation, Solar Panels or smaller improvements like draught proofing?

To improve energy efficiency and create more comfortable living spaces, many homes undergo upgrades such as External Wall Insulation or smaller changes like draught proofing. To understand tenants' experiences with these improvements, we asked if they had received any energy efficiency work.

- **35% of respondents** said **yes**, while **65% did not receive any upgrades**.
- **Social housing tenants** were the most likely to receive improvements, with **38% confirming energy efficiency upgrades**.

- **Private renters (PRS) had the lowest rate of improvement**, with only **18% reporting any work done**.
- **Black and Minority Ethnic Renters (BAME) respondents** reported a **33% improvement rate**, aligning closely with the overall average.

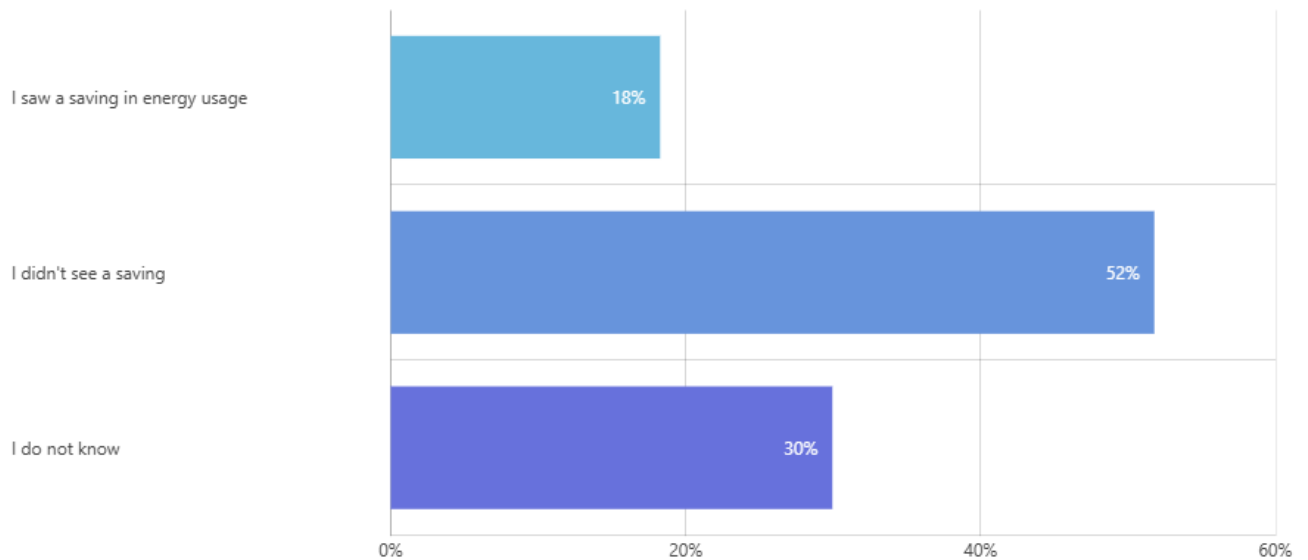


As a follow-up, we asked respondents who had received energy efficiency upgrades whether they noticed savings on their energy bills.

Note: Due to the price disparity between gas and electricity, immediate savings may not always be evident. Additionally, unit costs and standing charges for electricity can further impact overall affordability, making it harder for tenants to see direct financial benefits. However, improvements like insulation and draught proofing enhance overall comfort and can help reduce energy demand, which is key to lowering costs over time.

Findings:

- **18%** of respondents reported **savings on their energy bills**.
- **52%** saw **no savings**.
- **30%** were **unsure** whether the improvements had an impact.



When we look in detail -

- BAME respondents reported the highest savings, with 25% noticing a reduction in energy bills.
- Social housing tenants followed closely, with 19% reporting savings.
- PRS tenants had the lowest reported savings (9%), which aligns with their low rate of energy efficiency improvements (18%).
- The 60+ age group saw the highest reported savings (26%), possibly due to longer tenancy periods or greater awareness of energy efficiency measures.
- Younger renters (18-30) and middle-aged groups (31-45, 45-60) reported lower energy savings while a significant portion of 18-30-year-olds (50%) were unsure whether they had saved money, possibly indicating a lack of awareness about energy efficiency improvements or limited time in the property to notice changes.

Section Highlights

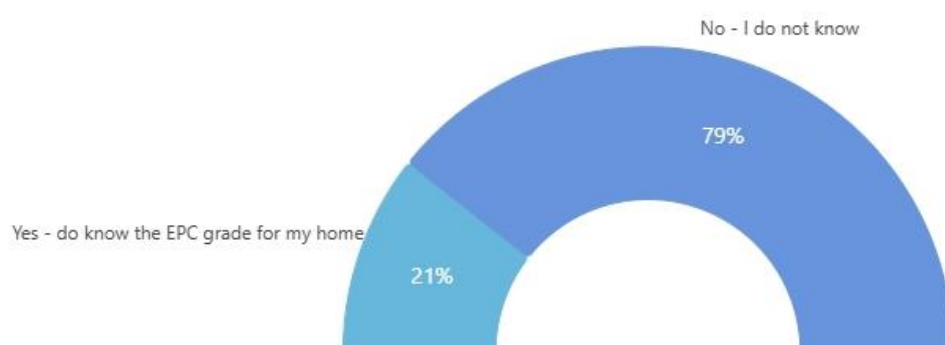
- Energy efficiency upgrades don't always result in immediately noticeable financial savings, as factors like energy price fluctuations and usage patterns play a role.
- 36% of respondents were unsure if they saved money, highlighting the need for better communication on energy cost changes after retrofits.
- Older and BAME respondents reported the highest savings, while PRS tenants and younger renters saw the least financial benefit from these improvements.

Section 2 - Attitudes and Perceptions: What EPC Ratings Mean for Tenants

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.

To understand awareness, we showed respondents an EPC rating chart and asked if they knew their home's rating:

- **21% of respondents knew their EPC rating**, a decrease from **29% last year**.
However, this change may be influenced by how the question was asked—last year, respondents were first shown an EPC chart before being asked about their rating, whereas this year, they were asked directly.
- **79% said they did not know their home's EPC rating**, highlighting lack of awareness about energy efficiency ratings among tenants.

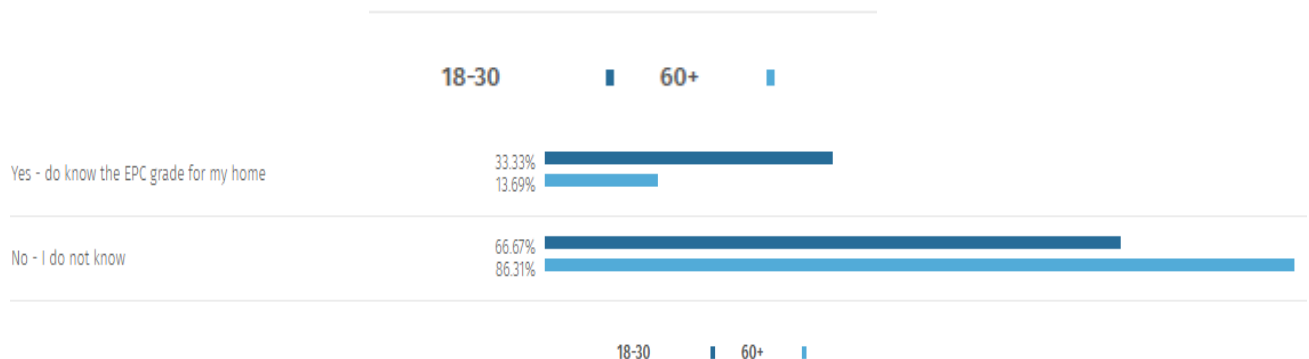


Addressing Accessibility Barriers for d/Deaf and Disabled Tenants

- Among d/Deaf and disabled tenants, EPC awareness remains low, with 79% unaware of their home's EPC rating.
- This suggests that accessibility in communication about energy efficiency may be a barrier. Ensuring energy efficiency programs are explained in accessible formats could help improve engagement and awareness.

EPC Awareness by Occupancy Type

- Private renters (PRS) had the highest awareness of EPC ratings, with 48% knowing their home's rating—a 3% increase from last year.
- In contrast, awareness was much lower among **housing association tenants (17%)** and **local authority tenants (20%)**.
- **BAME respondents (42%)** and **PRS tenants (48%)** were significantly more aware of EPC ratings compared to social housing tenants (**Local Authority: 20%, Housing Association: 17%**).
- This suggests that private renters and BAME tenants may be more engaged with energy efficiency information, while awareness remains low among social housing tenants.

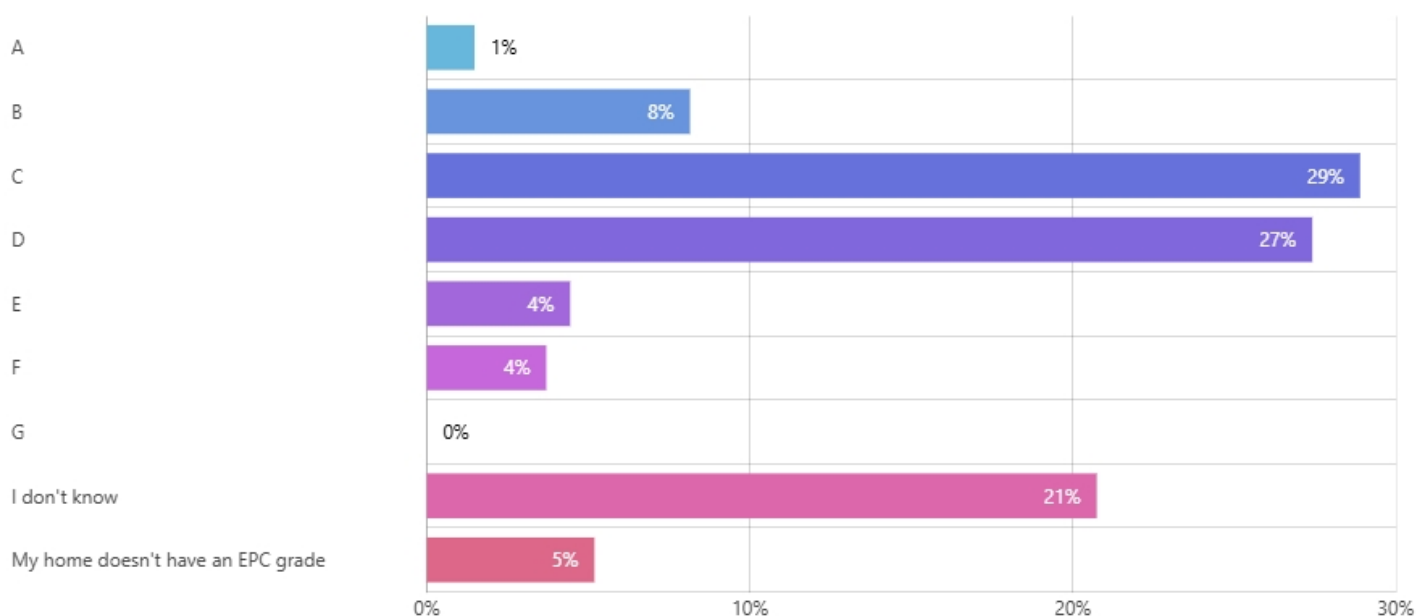


Among d/Deaf and disabled tenants, **a significant number reported being unsure of their EPC rating**, suggesting that accessibility in communication about energy efficiency may be a barrier. **Ensuring energy efficiency programs are explained in accessible formats could help improve engagement and awareness.**

Shift in EPC Awareness by Age Group

- Unlike last year, where younger respondents had higher EPC awareness, this year showed a different trend.
- EPC awareness among 18-30-year-olds dropped sharply from 43% last year to just 14% this year.
- This decline may indicate a lack of sustained awareness efforts or that newer renters in this age group are less informed than those surveyed previously.
- In contrast, awareness among the 60+ age group increased from 23% last year to 33% this year.
- This suggests better engagement among older tenants, possibly driven by energy efficiency initiatives targeting older and vulnerable households.

**Q. You said you know the EPC rating (energy efficiency) of your home.
Can you tell us what it is? (A-G)**



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?

EPC Ratings – Key Trends

- **EPC 'C' was the most reported rating this year (29% of responses), improving from EPC 'D' as the most common rating last year.** However, EPC 'A' remains rare, with only 1% of homes reaching the highest energy efficiency standard.
- However, tenants raised concerns that EPC ratings do not always match their lived experience.
- *"Think it showed as C in my handbook when I moved in... but it's freezing in winter even when heating is on."*
- *"My EPC has expired, and the last grade was D, but the property does not retain heat."*

Housing Association Vs Local Authority Performance

- Housing Associations scored better than Local Authority housing, with more homes rated B (11%) and fewer in D (17%). However, EPC awareness still needs improvement—over 27% of HA tenants do not know their home's EPC rating.
- Local Authority homes continue to lag in energy efficiency, with 41% of homes still in EPC D—a significantly larger share than HA homes (17%).
- This suggests that many Local Authority homes remain less energy efficient, which can lead to higher energy costs for tenants.
- Lower EPC ratings may be influenced by multiple factors, including the age of housing stock and tenant perceptions of damp and mould.
- In Wales, around 33% of homes were built before 1930 (ONS data), meaning that many properties may require significant upgrades to meet modern energy efficiency standards.
- More investment is needed to bring social housing stock up to at least EPC C. This would not only improve affordability for tenants but also contribute to wider sustainability and decarbonization efforts.

Energy Efficiency Remains a Concern in PRS and BAME Homes

- EPC D is the most common rating in both groups, affecting 43% of PRS homes and 40% of BAME homes.
- BAME respondents reported a higher share of EPC E-rated homes (20%) compared to PRS tenants (13.33%), suggesting that this group may experience higher energy costs due to less efficient housing.

Black and Minority Ethnic Renters Have Lower EPC Awareness

- 20% of BAME respondents didn't know their EPC rating, compared to just 3% of PRS tenants.
- This suggests a gap in awareness and information accessibility for BAME tenants, potentially impacting their ability to make informed housing decisions.

Homes Without an EPC Rating

- 3.33% of PRS tenants reported their home had no EPC rating. This suggests some PRS homes may not be fully compliant with EPC disclosure regulations or are not aware of it.
- Housing associations had the highest share of respondents reporting homes without an EPC grade, possibly due to delays in certification or outdated records. It could also be linked to length of tenancy which is usually longer in social housing.

Q. You have selected what you think the EPC for your home is.

We wish to sample responses to look up the actual EPC v's your perception.

Note: Results would never be published on an individual basis. Would you be willing to share your postcode and first line of your address so we could check your EPC rating against your perception for research purposes?

Given the lack of understanding around EPC, our third question in the EPC series asked respondents to enter the EPC rating of their home—whether based on a guess or what they had been told. We appreciate the many respondents who shared their addresses with us. Without using any individual data, we compared 100 responses to actual EPC records to evaluate how accurate these perceptions are.

Unlike a study by Shipton Building Society (2023), where 84% of homeowners overestimated their EPC rating, we found that tenants were much more accurate—but some gaps remain.

Perception Vs Reality

- **Most tenants got it right** – 82% of people correctly identified their EPC rating, which is reassuring.
- **Some overestimated** – 14% thought their home was more energy efficient than it actually is. This might be because of recent home upgrades or just assuming things are better than they are.
- **A few underestimated** – 4% thought their home was worse off than it actually is, which could mean they feel colder or struggle with heating, even if their home is rated better on paper.
- **Missing records** – In some cases, we couldn't find an EPC record, making it unclear whether tenants were guessing or if their property simply doesn't have an up-to-date certification.

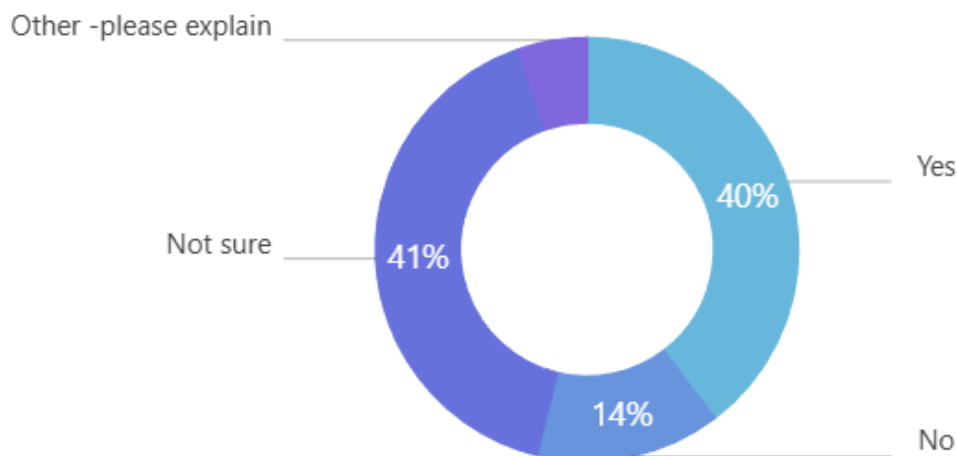
This tells us that while most tenants have a decent idea of their home's energy efficiency, there are still gaps.

Some may be under false impressions, thinking their home is better (or worse) than it really is. Better communication and clearer access to EPC details could help tenants make more informed choices about their homes and energy costs.

Final note: We also recorded two separate PRS tenants (Cardiff area) who both stated their EPC was C, but we found no record of an EPC or any registration with Rent Smart Wales. Both came from ethnically diverse backgrounds, raising questions about unregistered landlords or fake documentation.

Q. Energy efficiency significantly impacts the cost of heating and running your home, potentially saving up to £1,500 a year (e.g. between properties graded EPC E and A)

If the EPC was displayed (as it should be by law) would it make any difference in your selection of potential properties to rent?



The Energy Performance Certificate (EPC) plays a crucial role in net zero initiatives, including the Welsh Housing Quality Standard (2023). However, it is also an essential factor for tenants when making rental decisions, influencing both affordability and comfort. Ultimately, EPC transparency helps tenants understand potential energy costs and long-term savings associated with a home.

EPC Ratings Matter to Some, But Awareness Gaps Persist

- 40% of respondents considered EPC ratings, showing that for a significant portion of tenants, energy efficiency plays a role in rental decisions.

- However, 41% of respondents were unsure if EPC ratings influenced their decision, suggesting that many renters may not fully understand or prioritise EPC information when choosing a home.
- 14% did not consider EPC ratings at all, showing that for some, other factors such as location, rent price, or availability took priority.

Low EPC Awareness May Be a Factor

- The high percentage of "Not Sure" responses (41%) suggests a potential lack of transparency or communication about EPC ratings when tenants are searching for a home.
- More accessible EPC information at the point of renting could help tenants make more informed choices.

Is there a choice?

- 5% of respondents selected "Other", indicating that additional factors, such as affordability, property condition, landlord policies, or personal needs, were more decisive than EPC ratings.

Private Rented Sector Vs Social Housing

As per our research and understanding, majority of the properties in Social Housing are not advertised with EPC details at the top or in much detail. However, EPC being an important element for affordability and tenants' right on making a choice basis transparent information we found the following -

- 73% of PRS tenants considered EPC ratings when choosing their home, compared to only 35% of social housing tenants.
- This suggests that EPC ratings are more commonly factored into rental decisions in the private sector, likely due to the rental model.

A small but important group of respondents (**5%**) selected "**Other**" when asked whether EPC ratings influenced their housing choice.

Their responses highlight significant barriers that prevent tenants in vulnerable situations—from making energy efficiency a priority when choosing a home.

1. Lack of Choice in Housing Decisions

Many tenants emphasised that choice was not an option due to housing shortages, affordability constraints, or homelessness.

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

- *"There are no options due to the housing crisis."*
- *"Social housing tenants do not get a great choice (3 offers)."*

2. EPC Ratings Do Not Always Reflect Reality

Some respondents noted that their EPC rating did not match their lived experience, with homes being colder or less efficient than expected.

- *"Think it showed as C in my handbook when I moved in... but it's freezing in winter even when heating is on."*
- *"My EPC has expired, and the last grade was D, but the property does not retain heat."*
- *"The external cladding and new windows were done after I moved in, so EPC wasn't relevant at the time."*

3. Long-Term Tenants and Secure Tenancy Mean EPC is Irrelevant for Some

Some respondents noted that they had been in their homes for a long time, meaning they never considered EPC ratings when moving in.

- *"Started renting this flat prior to EPC ratings."*
- *"I have a secure tenancy and will not look to rent any other property."*
- *"My house doesn't have an EPC as I've been here for twenty years."*

4. Poor Housing Conditions and Lack of Repairs Reduce EPC Relevance

Some tenants reported serious maintenance issues (e.g., damp, mold, poor insulation) that made EPC ratings feel irrelevant.

- *"You don't know the problems until you are in the property, and when you inform them, they do nothing to resolve it."*
- *"In our case, our home suffers from rising damp and has done for over 15 years. Any improvements do not have the full impact."*
- *"EPC means nothing if local councils can't afford to improve properties."*
- *"EPC would come after good repair, accessibility, and location."*

The responses to this question highlight a wide range of perspectives, from enthusiasm about energy efficiency improvements to deep concerns about affordability, reliability, and tenant choice.

- **Affordability is the biggest barrier** – Tenants are worried that switching to electricity could increase their bills, particularly in social housing where rent and service charge structures may pass costs onto tenants.
- **Power cuts and infrastructure reliability are major concerns** – Many are worried about failures, questioning how well the grid can handle the increased electricity demand and whether there are adequate backup solutions in place.
- **Tenant engagement is lacking** – Many tenants, particularly in social housing, feel that decisions about energy transitions are made without consulting them.
- **Smart technology is a barrier for some tenants** – While many welcome energy efficiency improvements, older tenants and those unfamiliar with digital systems struggle with smart meters and automation, making user-friendly solutions essential.
- **Broader environmental concerns exist** – While some support net zero, others question the environmental ethics of battery production, energy sources, and the true sustainability of electric-only systems.

BROAD THEMES -

1. Comfortable with the Transition

- a. Many tenants expressed support for the transition, seeing it as an environmentally friendly and necessary change.
- b. Some mentioned personal benefits, such as lower bills and better energy efficiency.

- i. "Yes, I am comfortable with this transition."*
- ii. "I think it's much more energy efficient and saves costs."*
- iii. "I believe we could benefit from this change due to being able to see and understand the way we use energy within the house."*

2. Cost Concerns & Affordability

- a. A major concern was that electricity is currently more expensive than gas, leading to fears that the transition could increase energy bills rather than reduce them.
- b. Some respondents were already struggling with high energy costs, and the uncertainty of price increases added to their hesitation.

- i. "Electricity is more expensive than gas, so I am worried this will cost me more."*
- ii. "The electric is so expensive, I pay £154 monthly."*
- iii. "Any costs would be passed down to tenants through rent increases."*

3. Concerns About Power Cuts & Reliability

- a. Several tenants raised reliability issues, particularly the risk of power cuts.
- b. Some worried that relying solely on electricity could leave them without heating or hot water during outages.
- c. Others pointed out that older homes may struggle with the new infrastructure.
 - i. *"What happens if there is a prolonged power cut?"*
 - ii. *"My concern is that power outages are becoming more frequent due to storms."*
 - iii. *"I would not want to lose any floor space to new technologies and worry about increased costs."*

4. Lack of Choice & Tenant Autonomy

- a. Many respondents in social housing stated that they were not given a choice about the transition.
- b. Some worried that landlords would make upgrades without consulting tenants, leading to higher service charges or changes that do not suit their needs.
 - i. *"Choice isn't an option when you are faced with homelessness."*
 - ii. *"My landlord will take the cheapest option available just to tick a box, then raise the rent."*
 - iii. *"We may transition to all-electric, but electricity must still be generated—what's the long-term plan?"*

5. Technology Concerns & Accessibility

- a. Some respondents, especially older tenants, raised concerns about the complexity of smart controls and new energy systems.
- b. Many did not feel confident using smart meters, digital thermostats, or energy management systems.
- c. Others mentioned that new heating technologies do not always work effectively in all homes.
 - i. *"Too much technology is not easy for older people."*
 - ii. *"I wouldn't want smart controls to be forced on me."*
 - iii. *"I live in a flat, so I don't know how this would work."*

6. Environmental and Ethical Concerns

- a. Some respondents supported the transition but raised questions about the broader environmental impact, such as the sourcing of rare earth metals for batteries.
- b. A few challenged the effectiveness of net zero policies, questioning if electricity production itself is truly sustainable.

i. "Rare earth metals used for batteries have massive human and environmental costs."

ii. "Net zero is a lie. CO2 levels are not what people claim they are."

iii. "We must look at hydrogen and waste-heat recovery as alternatives."

Section 4 - Rent and Affordable Warmth: Striking the Right Balance

Background

The **Welsh Housing Quality Standard (2023)** sets out several key objectives, including **creating affordable warmth**. In addition, the **Welsh Government's Optimised Retrofit Programme (ORP)** takes a whole-house, pragmatic approach to decarbonising existing homes, supporting the Welsh Housing Quality Standard 2023 as the Welsh Government and social landlords work toward establishing a new standard.

However, given the scale and complexity of retrofitting, achieving these standards cannot be met solely through existing funding streams. Depending on the required improvements, properties may need new radiators, upgraded windows, insulation work, and other energy efficiency enhancements. While these upgrades are essential for reducing carbon emissions and lowering energy bills, they come at a significant cost, raising a key question:

“Who is paying for Net Zero?”

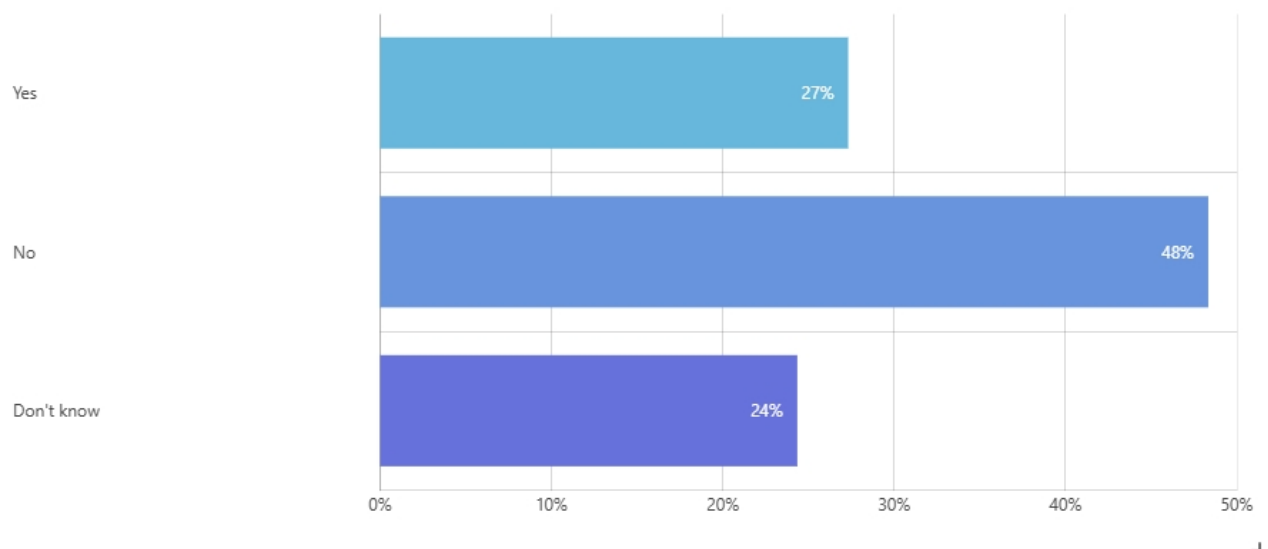
A report by **Future Generations Wales** estimates that **£14.75 billion** in total investment will be required by **2030** to retrofit all homes in Wales. Various solutions have been discussed by government officials and the housing sector, including raising rents to cover upgrade costs or securing additional funding from the Welsh Government.

In theory, a more energy-efficient home should result in lower energy costs for tenants. However, many remain sceptical about whether these savings will materialise or offset potential rent increases. To understand tenant perspectives, we asked respondents whether they feel comfortable paying increased rent for a low-energy-cost home.

Q. To make homes warmer and healthier, heating systems are being upgraded to energy-efficient solutions that reduce energy bills. However, these upgrades can be costly for landlords. Do you agree or

disagree with this idea: Rent should be slightly higher for homes that have lower energy bills (better energy efficiency) and slightly lower for homes with higher energy bills (less energy efficiency)

- A Majority Oppose Rent Increases Linked to Energy Efficiency - 48% of respondents disagreed with the idea of adjusting rent based on energy efficiency.
- 27% of Respondents supported the idea, while 24% were unsure choosing **"Don't Know" responses** suggesting that tenants lack clear information on how this system would work.



COMPARATIVE VIEW 2024 Vs 2025

- This year, 27% agreed to link rent and energy efficiency, compared to 23% last year, suggesting a slight increase in acceptance - possibly due to the rising cost of energy bills.
- However, tenants remain hesitant unless clear guarantees are provided that savings will exceed the rent increase.

- 48% of tenants opposed the idea this year, compared to 45% last year - a small but noticeable increase in resistance.

Note: This year's survey used broader response options, while last year included more specific choices:

- (1) Yes, if energy savings exceed rent increase,
- (2) Yes, for a lower-carbon home
- (3) No, I don't trust that savings will outweigh rent increase
- (4) No, I oppose paying more for low-carbon homes
- (5) Other.

This change may have influenced how opinions were recorded.

Housing Association vs Local Authority

- Housing Association (HA) tenants were slightly more opposed (50%) than Local Authority (LA) tenants (47.11%)
- **Only around a quarter of tenants in both LA (26%) and HA (25%) agreed** that energy-efficient homes should have slightly higher rent.
- Uncertainty is consistent across both groups - 26% of LA tenants and 25.15% of HA tenants were unsure, indicating that tenants may not fully understand the impact of energy-efficient upgrades on their long-term costs.

Age Variation

- **Younger tenants (18-30) are the most opposed to rent increases for energy-efficient homes**
- 63% of tenants aged 18-30 rejected the idea, the highest opposition across all age groups.
- This suggests that affordability is a primary concern for younger renters, who may lack confidence that energy savings will offset rent hikes.
- **Tenants aged 31-45 are the most open to the idea (34% said Yes)**
- This age group had the highest support for linking rent to energy efficiency, possibly because they see long-term savings as a worthwhile trade-off.
- **Older tenants (60+) are the most uncertain (29% "Don't Know")**
- This group had the highest share of uncertainty, suggesting they may need more information about how energy-efficient homes impact long-term affordability.

31-45 age group is the most receptive, targeting this group with pilot programs or case studies demonstrating savings could encourage wider acceptance.

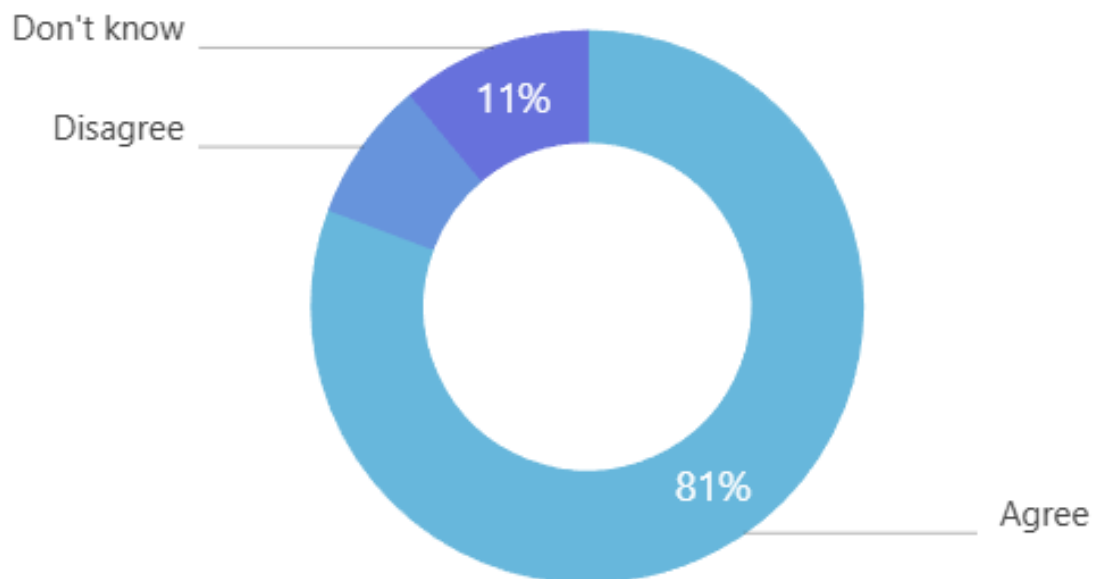
PRS Vs Social Housing

- PRS tenants are significantly more open to rent adjustments for energy efficiency
- 39% of PRS tenants agreed with the idea, compared to only 25%% of social housing tenants.
- PRS tenants may be more familiar with market-driven pricing adjustments, making them more willing to accept changes if they result in cost savings.
- Compared to PRS tenants (15%), social housing tenants were much more likely to say, "Don't know," suggesting a lack of clarity or trust in how the system would work.
- This may reflect concerns about landlords passing on costs without ensuring fair reductions in energy bills.
- Nearly half of both PRS (47%) and social housing tenants (49%) rejected the idea, reinforcing the broader scepticism seen across different groups.
- Affordability concerns likely drive this resistance, as tenants may fear that rent increases will not be offset by lower energy costs.

In our next question, we wanted to explore tenant's views on something which matters to them the most – rent and suitable standard of living.

Through our conversations with tenants, we have always understood that there is an underlying sentiment to see landlords improving the standard before increasing the rent. With rent an important topic for 2025, we wanted to check what do respondents feel about this view, and if they share other's feelings.

Q. Tenants have said that landlords should not raise rents on homes with very low energy efficiency (EPC rating E or below) until they improve the homes to a suitable standard, like an EPC rating of D. Do you agree?



- As expected, **81% of all respondents** agreed that landlords should not raise rents on homes with poor energy efficiency until improvements are made.
- This overwhelming majority suggests that tenants view energy efficiency as a fundamental component of housing quality, rather than an optional upgrade.
- It also reflects concerns about affordability, as homes with poor insulation and inefficient heating systems often result in higher energy bills, disproportionately affecting low-income tenants.
- **Only 8% disagreed with the statement**, indicating that a very small fraction of tenants believe landlords should have the right to increase rents regardless of energy efficiency standards.
- Potential reasons for disagreement might include landlords' costs for maintenance and improvements, market-driven rent adjustments, or a belief that tenants should have options rather than restrictions on rent pricing.
- 11% were unsure, suggesting that some tenants may lack awareness of EPC ratings and their impact on housing costs.
- It may also indicate uncertainty about policy enforcement or who should bear the responsibility - landlords, tenants, or government schemes.

Private Rented Sector (PRS) Vs Social Housing

- **PRS tenants: 97% agreed** that landlords should not raise rents until homes are improved to at least EPC D.
- **Social housing tenants: 79%** shared the same view.

The near-unanimous agreement among PRS tenants, suggests a much stronger expectation for landlords to be held accountable for energy efficiency before raising rents. This could stem from:

- Higher rent levels in the PRS, making energy costs a critical concern.
- Less security in PRS tenancies, leading to greater financial vulnerability
- A perception that private landlords have greater financial capacity to improve energy efficiency than social landlords.

Meanwhile, the social housing agreement rate is lower (79%), though still a strong majority. Social housing tenants might recognise the constraints social landlords face in funding energy efficiency upgrades, particularly in the face of broader affordability.

b. Disagreement: Only Social Housing Tenants Express Opposition

- PRS tenants: 0% disagreed, showing complete alignment in favour of delaying rent increases until homes are improved.
- Social housing tenants: 9% disagreed, indicating that some accept the possibility of rent increases despite low energy efficiency.

c. Uncertainty: Higher Among Social Housing Tenants

- PRS tenants: Only 3% were unsure.
- Social housing tenants: 12% responded with "Don't Know."

The higher uncertainty in social housing could stem from:

- A lack of clarity on how energy efficiency improvements are funded within social housing.
- Less awareness of EPC ratings and their impact.
- Variability in how different social landlords approach energy efficiency and rent-setting policies.

Black and Minority Ethnic Renters

- BAME Tenants: 91% agree that rent hikes should be tied to energy efficiency improvements, showing stronger support than social housing tenants overall. 0% disagreed, indicating a unanimous stance against unfair rent increases.

AGE VARIATION

a. Strongest Agreement Among Younger Tenants (18-30)

- 93% of 18-30-year-olds agree that landlords should not raise rents on homes with poor energy efficiency.

- This is the highest agreement across all age groups, suggesting younger renters may be more cost-sensitive and expect stricter housing standards.
- Only 2% disagreed, and 4% were uncertain, showing a strong consensus.

b. Agreement Decreases with Age

- 60+ group: 81% agree, slightly lower than younger tenants but still a strong majority.
- 31-45 group: 80% agree, very much like previous age group.
- 45-60 group: 75% agree, the lowest agreement rate among all age groups.
- This downward trend suggests that older tenants may be more accepting of rent increases despite poor energy efficiency, possibly due to:
- A greater focus on long-term stability in housing rather than immediate costs.

c. Disagreement and Uncertainty Increases with Age

- **18-30:** Only 2% disagreed and 4% were uncertain (the lowest uncertainty).
- **45-60:** 10% disagreed, and 15% were uncertain, the highest of all age groups.
- Older tenants appear to be less sure or more divided on the issue, possibly due to:
- Experience with past rental market trends.

Final Question we asked – why not join the conversation!

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

Category	Renters who signed up
YES, I'd like to join a group for Tenants who've had energy efficiency work done at their home	101
YES, I'd like to join a group for Tenants who have an interest in low carbon housing.	88

Recommendations

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

Shift the focus from just energy efficiency targets to tenant well-being and affordability. Net Zero policies should not just aim for efficiency improvements but ensure tenants experience tangible benefits in warmth, comfort, and affordability. This includes rent stabilisation, direct cost relief, and prioritising upgrades that actually lower bills.

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.

Improve awareness and accessibility of EPC ratings and heating efficiency benefits. Given the steep decline in EPC awareness (especially among younger renters), housing providers must ensure that EPC ratings and their financial impact are clearly communicated at the point of rental. Policies should encourage landlords to display EPC ratings prominently and provide guidance on expected heating costs.

Address structural housing issues, particularly windows and insulation, as part of Net Zero improvements. Tenant concerns about heat loss due to outdated windows and poor insulation show that heating system upgrades alone are not enough. Landlords should prioritise structural improvements alongside efficiency measures to ensure homes retain heat effectively.

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.

'Against the tide of climate change misinformation, we must remain committed to affordable warmth. With 70% tenants struggling to heat and most homes rated below EPC band C - doing nothing is no longer an option. It is a necessity to improve our housing stock, making homes more energy-efficient, and significantly improving the lives of those who live in them.'

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 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 for Pobl 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.