



Voice of the Tenant Survey

October 2022

Commissioned by the



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BACKGROUND

The TDS Charitable Foundation exists to advance education about housing rights and obligations in general, and in particular about:

- (a) best practice in the management of private rented housing and**
- (b) legal rights and obligations which are of particular relevance to those who are involved in the provision or management of private rented housing or who hold tenancies within the private rented housing sector.**

It also promotes by education the use of alternative dispute resolution processes for the more efficient and effective resolution of disputes between landlords and tenants within the private rented housing sector.

The Charitable Foundation delivers these objectives primarily through grant funding of organisations to deliver projects which meet these objectives.

A Digest of all of the projects which the Charity has funded can be found on the TDS Charitable Foundation website.

VOICE OF THE TENANT SURVEY

The TDS Charitable Foundation has commissioned Insight Advantage to carry out this Tenant Survey to assist the Trustees in focusing its resources on projects that will best address the education and knowledge gaps that landlords and tenants face.

The Trustees also recognise that these issues can change as the private rented sector changes in relation to socio-economic challenges and the Voice of the Tenant survey will be repeated on a regular basis to ensure that the Foundation's work remains relevant and targeted.

For more information on the TDS Charitable Foundation please visit our website at www.tdsfoundation.org.uk

SURVEY PARTICIPANTS

The 2,002 participants of the survey were tailored to ensure that the survey samples was representative of the Private Rented Sector, as set out within the English Housing Survey.

SURVEY PARTICIPANTS BY AGE

Age	Survey Participants
18-24	12.6%
25-34	30.9%
35-44	21.4%
45-54	15.6%
55+	19.5%

SURVEY PARTICIPANTS BY GENDER

Gender	Survey Participants
Male	48.5%
Female	50.6%
Non-binary, other, prefer not to say	0.9%

In order to provide further context to the data, we created a number of 'life stages' to categorise tenants. The breakdown of survey participants by life stage is set out in the tables.

SURVEY PARTICIPANTS BY LIFE STAGES

Life Stage	Survey Participants
IGens U25	12.6%
Nesters 25-49	12.9%
Soloists 25-49	6.8%
Sharers 25-49	6.0%
Families U35	18.9%
Families 35+	24.2%
Couples 50+	12.0%
Soloists 50+	11.6%

SURVEY PARTICIPANTS BY HOME ENVIRONMENT

Home Environment	Survey Participants
In a city/large town	38.4%
In the suburbs of a city/large town	28.0%
Urban	66.4%
In a small town	22.5%
In a village/hamlet/countryside	11.1%

SURVEY PARTICIPANTS BY REGION

Region	Survey Participants
Greater London	20.6%
Midlands	16.9%
North East	4.0%
East	9.5%
North West	11.6%
Wales	3.8%
South West	10.0%
Yorkshire & Humberside	10.1%
South/South East	13.5%

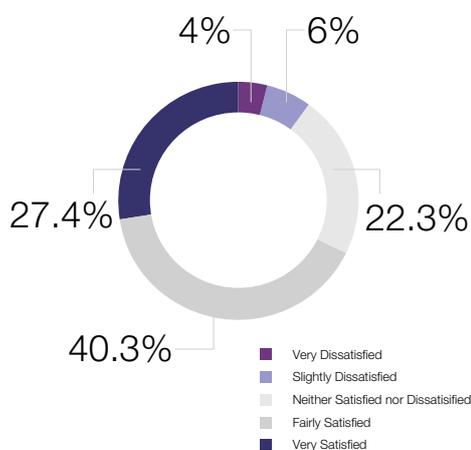
OVERALL TENANT SATISFACTION

The survey looked at the overall levels of tenant satisfaction across the private rented sector.

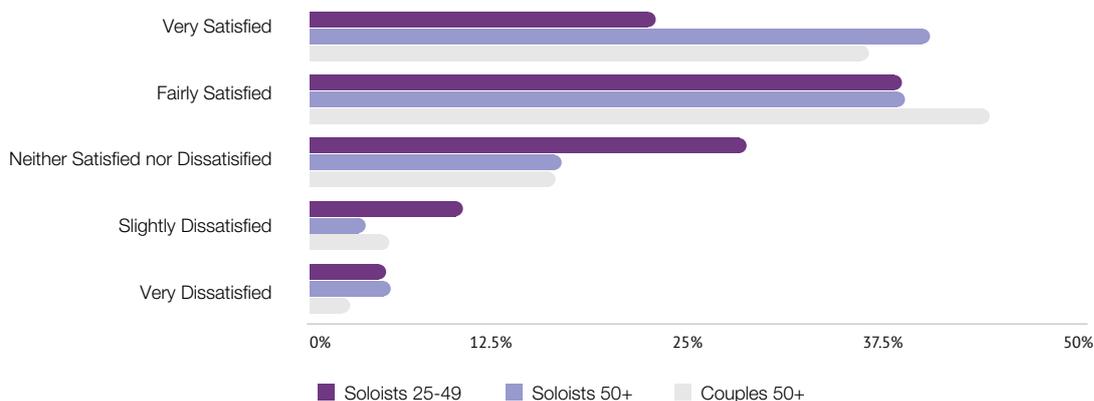
Overall, 67.70% of tenants were satisfied with their experience as a renter in the private rented sector, with 22.30% neither satisfied nor dissatisfied, and 10% expressing dissatisfaction.

This is similar to the levels of satisfaction with their tenure that was found in the most recent English Housing Survey which said that 63% of private tenants sector were satisfied with their current accommodation.

Overall tenant satisfaction



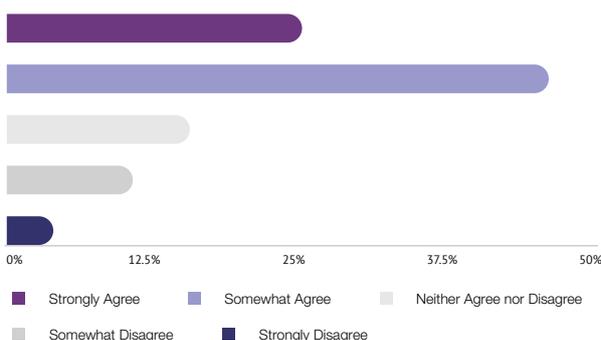
Satisfaction by life stages



Tenant understanding of their rights and responsibilities

A key role of the TDS Charitable Foundation is to advance the education of tenants and landlords about their respective rights and responsibilities. The Tenant Survey asked a number of questions of tenants about how well they understood what it means to be a tenant.

Understanding of rights and responsibilities



70.4% of participants agreed that they understood their rights and responsibilities as a renter, with 14.2% disagreeing.

Tenancy documentation

Much of the legislation and regulations relating to the private rented sector relies upon landlords providing key documentation to tenants [such as the Government’s “How to Rent Guide in England”].

The survey asked whether tenants in England and Wales were familiar with some of the important documents they should have as part of their rental agreement. Participants were asked whether they had received each document.

RECORD OF DOCUMENTATION RECEIVED

Document	Yes, I have been given this document	I’m unsure whether I have been given this document	No, I have not been given this document
Government’s How to Rent Guide	34.6%	21.8%	43.5%
Deposit Protection Certificate	54.8%	18.7%	26.5%
Prescribed Information	48.5%	19.8%	31.7%
Gas Safety Certificate	63.5%	12.8%	23.7%
Tenancy Agreement	82.6%	7.4%	10%
Energy Performance Certificate	51.3%	18.9%	29.8%

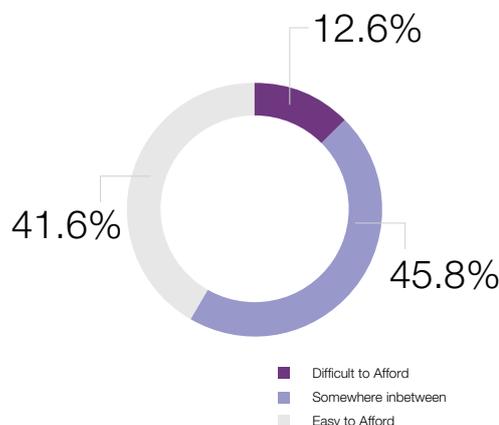
Given it is likely that in most cases all of these documents will have been supplied to tenants, the challenge for landlords is to ensure that tenants are fully aware [and therefore will later recall] the importance of each of these documents to them as a tenant.

AFFORDABILITY AND COSTS

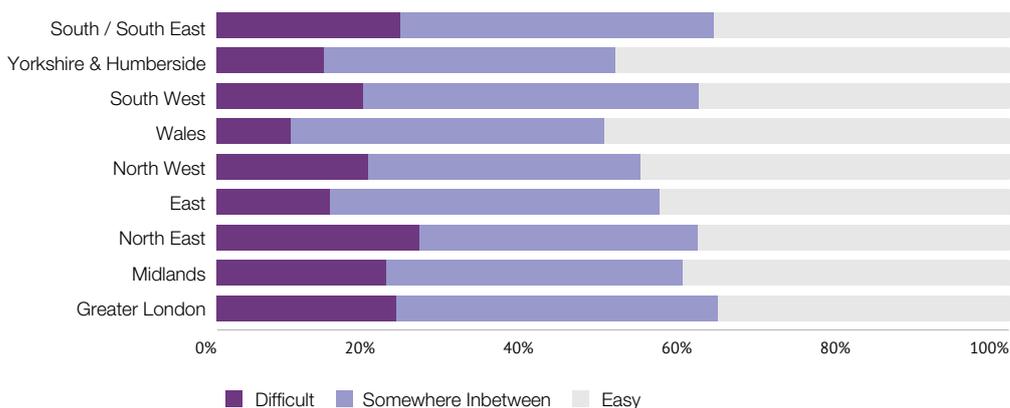
In this section we asked tenants how able they were to pay the rent.

Overall affordability rating

12.6% of participants scored their ability to afford their monthly rental as difficult, with 41.6% asserting they were able to afford the monthly rental more easily. Soloists between the ages of 25-49 found it most difficult to afford their rent [19.6% of participants], with couples over the age of 50 scoring the highest in their monthly rental being affordable [54.1%].



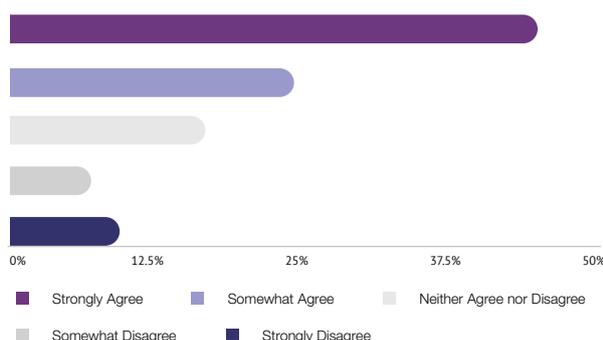
Ability to afford rental by region



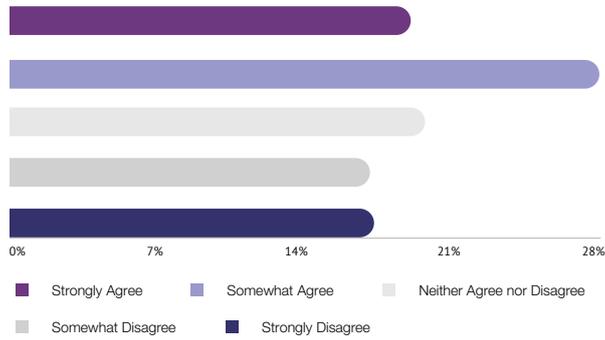
Tenants reported that affording the rent was difficult in all regions but over 20% of tenants reported this in the South/South East, the North East, the Midlands and in Greater London.

Desire to buy own home

67.9% of participants expressed a desire to ultimately buy their own home, with 15.9% asserting that they would not like to purchase a home of their own. However, this desire to become a home owner was also tempered by a degree of realism with a large proportion of tenants [46.6%] being clear that they felt that would not leave the private rented sector in their lifetime.

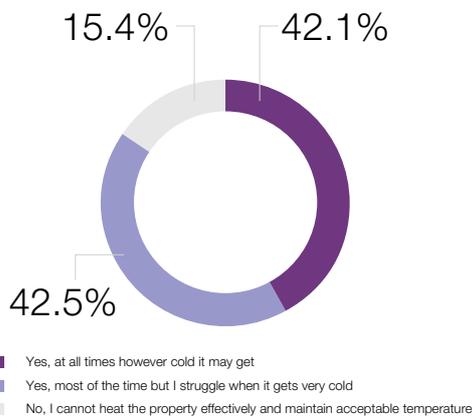


Likelihood to rent for the rest of life



Ability to heat the property effectively

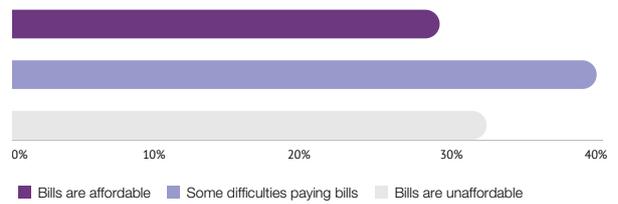
42.1% of participants confirmed they were able to heat the property at all times, with 15.4% stating they have significant difficulties in heating the property and maintaining an acceptable temperature all year round.



Ability to afford energy/utility bills

31.8% of participants find it difficult to afford their energy and utility bills with a further 39.3% stating they had some difficulties.

Just 28.9% of participants were comfortable paying their utility bills on a regular basis.

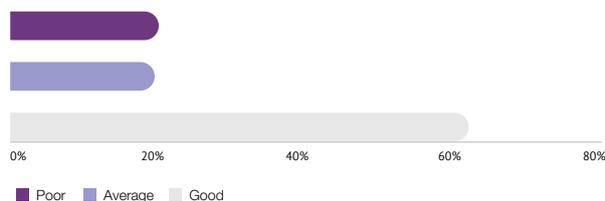


PROPERTY CONDITION

In this section tenants were asked about the condition of their property, whether any improvements were required, and to which areas, and whether there were any outstanding repairs required.

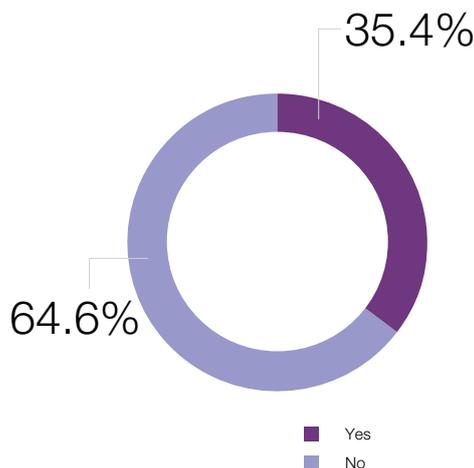
Overall property condition

61.30% of participants rated their property to be in a good overall condition, with 19.90% rating their property as poor.



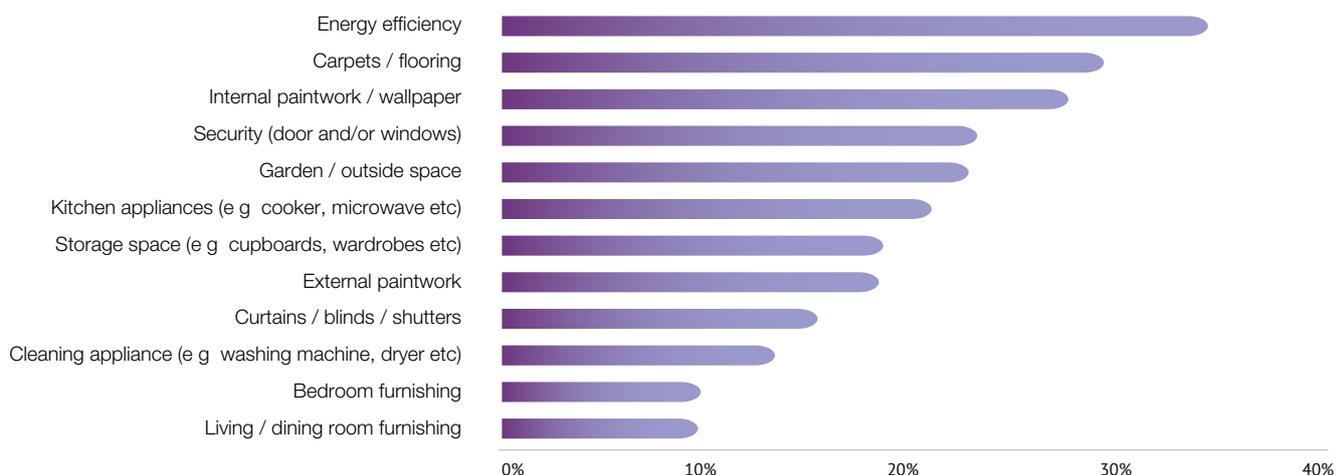
Outstanding repairs

The majority of participants [64.6%] confirmed that there were no repairs outstanding exceeding a four-week waiting period. However, 35.4% reported that they did have outstanding repairs required to the property.

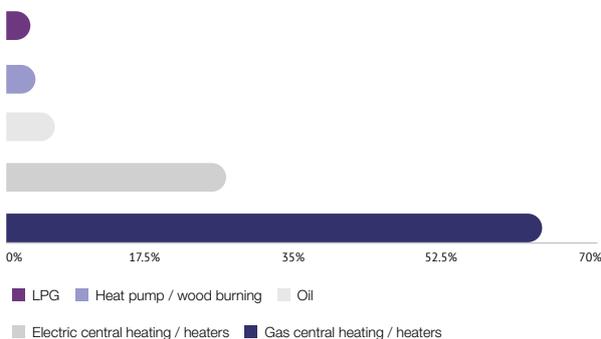


Improvements required to property

The survey was conducted in September 2022 when there was a lot of concern being expressed at the increases in energy prices. As such it no surprise that 33.9% of tenants were focused on energy efficiency improvements as an area where they thought further work was required.

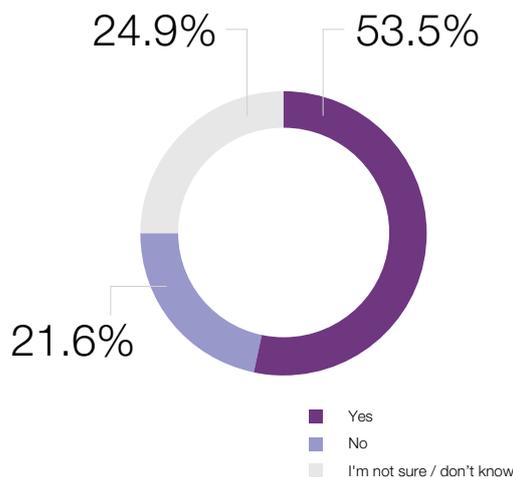


Sources of heating



Can landlords improve the energy efficiency within their property

53.5% of tenants felt their landlord could improve the energy efficiency of their property with 21.6% stating there was nothing more their landlord could do.

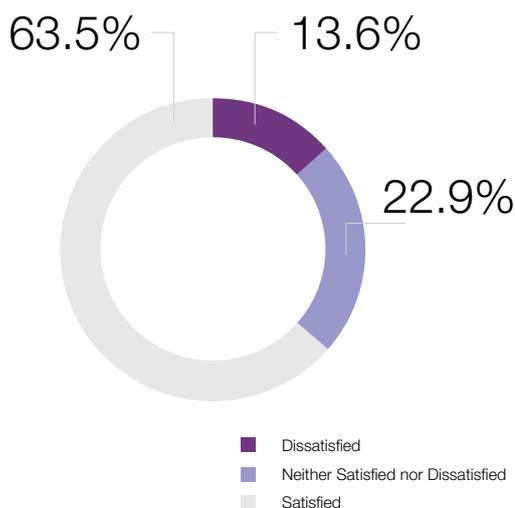


Views on Agents and Landlords

This section focuses on the overall satisfaction of tenants towards their letting agent or landlord.

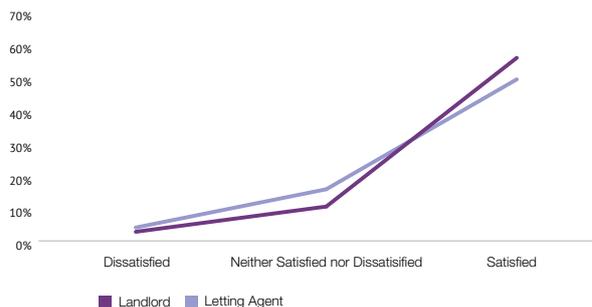
Satisfaction with the agent/landlord

The survey showed that 63.5% of participants were satisfied with their letting agent/landlord compared to a minority of 13.6% who were dissatisfied.



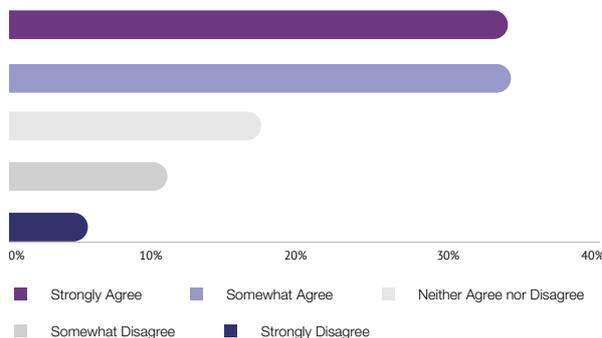
Satisfaction rating letting agent vs landlord

In terms of differentiation between landlords and letting agents there was a similarity of views about landlords and letting agents.

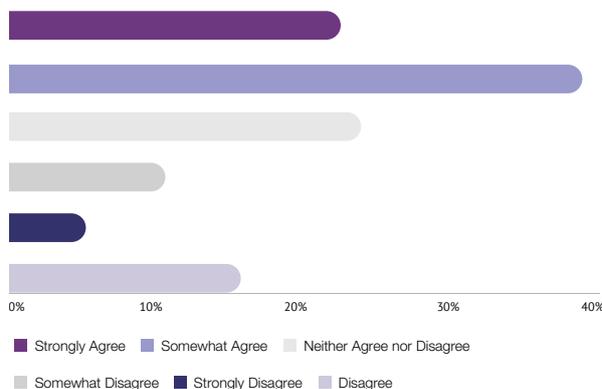


Communication

67.7% say that they find it is easy to communicate with their landlord or agent but 15.7% find this challenging. The earlier survey questions about whether tenants had received relevant documentation about their tenancy showed that there were surprising gaps in the information that tenants said they had received. This chart however shows that tenants are supportive of the efforts made by landlords/agents to help them understand their rights and responsibilities [although 20% do disagree.]

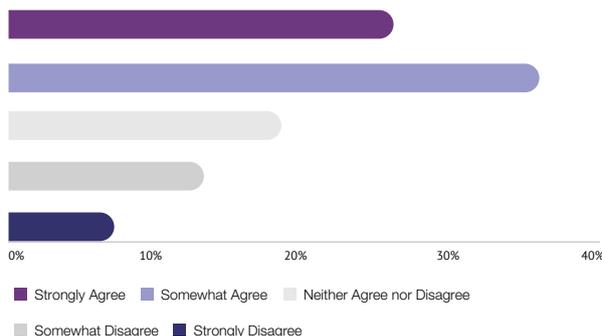


The landlord / letting agent has ensured that I fully understand my rights and responsibilities as a tenant



The landlord / letting agent deals with any repairs or issues with my rental property efficiently

Similarly, this chart shows that most tenants think that landlords/agents deal with repairs promptly, with over 20% of tenants disagreeing

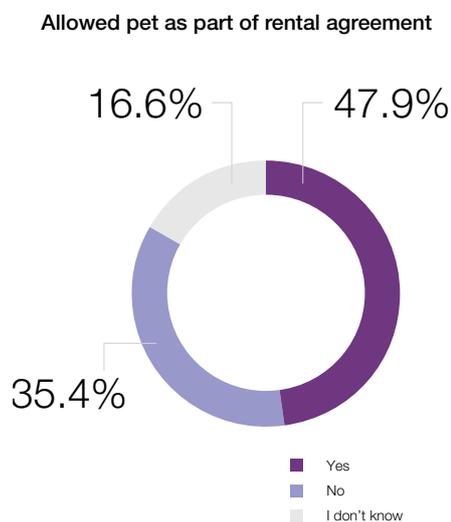
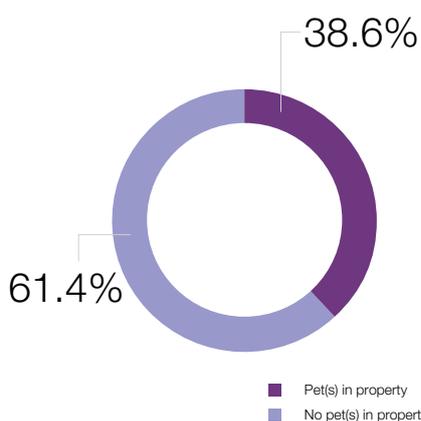


PETS

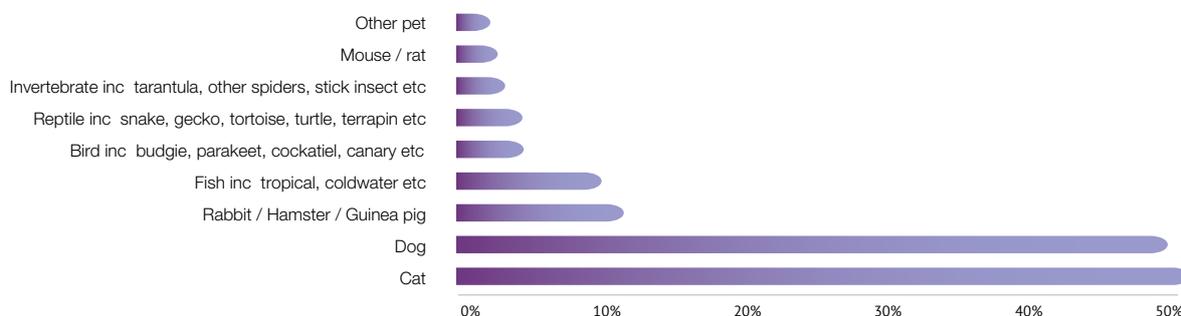
Pets are a big issue in rented housing for both tenants and for their landlords. The government in England is currently proposing that landlords should in most circumstances agree that their tenants should be able to keep a pet. The survey tested the views of tenants on these issues.

Pets in rental property

38.6% of tenants had a pet in their rental property, but only 47.9% of tenants admitted to being allowed a pet as part of their tenancy agreement. However, 87.9% say their agent/landlord is aware of their pet.

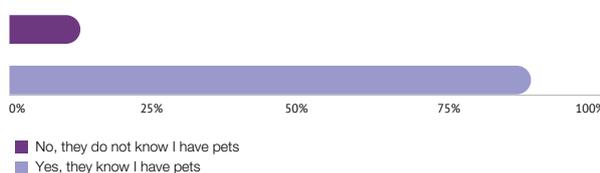


Types of pet in a rental property



Agent/landlord awareness of pet

The most common pets were cats and dogs, followed by rabbits/hamsters, and fish.



RENTAL REFORM

The Department for Levelling Up, Housing and Communities released their Rental Reform White Paper in August 2022 addressing a number of areas of the sector which required change to make renting easier.

Awareness of the Rental Reform proposals

Our data showed that 60.2% of tenants had never heard of the White Paper, and a further 25.9% had heard of it but had no idea what it was proposing.

After providing further detail on a number of key areas, we collected data to establish what tenants thought of the proposals, and how realistic they were.



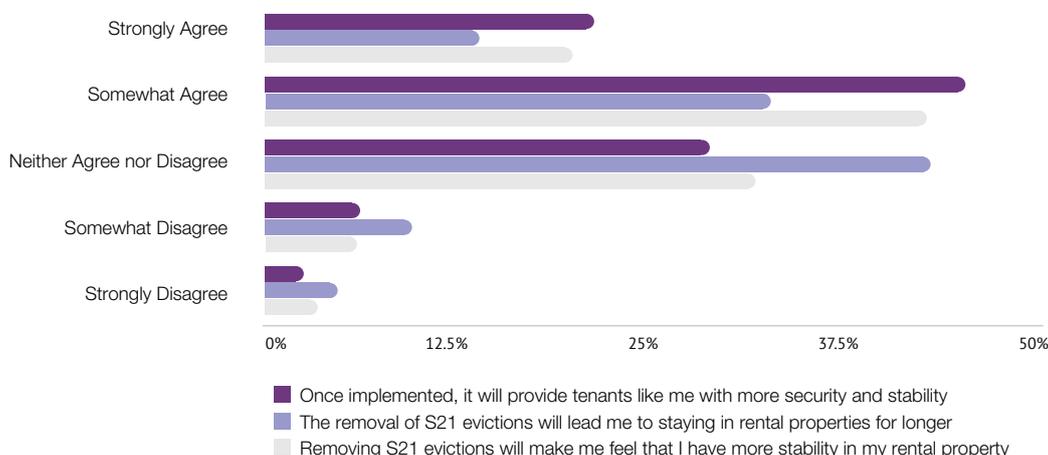
Opinions of tenants on the reforms

We found that 69.3% of tenants agreed that reform of the rental sector is long overdue, but 43.6% also felt the proposals would change very little. 64.7% of tenants felt that the reform will improve their rights.



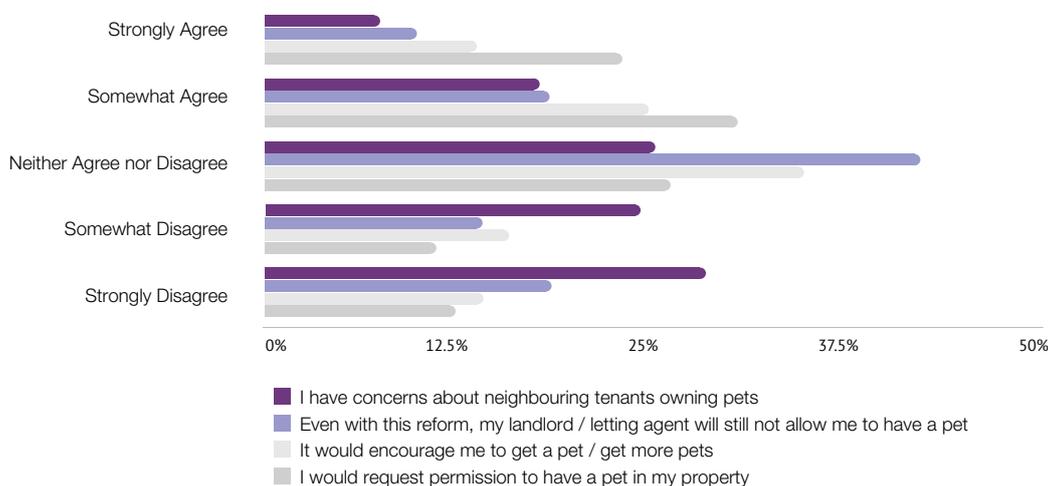
Tenant opinions on stability and security

When asked specifically about security of tenure, and proposals to remove S21 evictions, 60.8% of tenants felt that they would have more security. 45.05% of tenants felt that it would lead to them staying in rental properties for longer.



Tenant opinions on proposed pet reforms

When asked specifically about pets, 52.2% of tenants said they would request permission to have a pet if a landlord was obligated to not unreasonably withhold consent. A further 37.3% indicated they would be inclined to get more pets.





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