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Consultation – summary of response

Securing a path towards adequate housing including fair rents and affordability

April 2024

Mae'r ddogfen hon ar gael yn Gymraeg hefyd / This document is also available in Welsh
Rydym yn croesawu gohebiaeth a galwadau ffôn yn Gymraeg / We welcome correspondence and telephone calls in Welsh

Overview

This document summarises the Green Paper consultation on securing a path towards adequate housing including fair rents and affordability.

Action Required

This document is for information only.

Further information and related documents

Large print, Braille and alternative language versions of this document are available on request.

Contact details

For further information:

Housing Policy Division
Welsh Government
Cathays Park
Cardiff
CF10 3NQ

Email: privatesectorhousing@gov.wales

Additional copies

This summary of response and copies of all the consultation documentation are published in electronic form only and can be accessed on the Welsh Government's website.

Link to the consultation documentation: [Securing a path towards adequate housing including fair rents and affordability | GOV.WALES](#)

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Green Paper Consultation Events

The Green Paper was published for consultation on 6th June 2023, and over the summer workshops were held with various stakeholders, including private landlords and tenants. A total of 6 workshops were held in 3 venues, Llandudno, Carmarthen, and Cardiff, and were attended by 168 people. A summary of the main contributions provided by participants is available as an annex to this report (Annex 1).

Local Government and Housing Committee: The Right to Adequate Housing

The Minister for Climate Change gave evidence at the Local Government and Housing Committee's Inquiry (LGH Committee) on the "Right to Adequate Housing" on 4th May 2023. The LGH Committee published a report on its findings on 12 July 2023.

The LGH Committee report provided 10 recommendations, the evidence has been reviewed and we have responded to the report. The report and response can be accessed here: [The Right to Adequate Housing \(senedd.wales\)](https://www.senedd.wales/legislation-and-reports/the-right-to-adequate-housing).

The evidence submitted to the LGH Committee has been used as part of the analysis of the responses to the Green Paper Consultation. Several of the organisations who gave evidence to the LGH Committee also responded formally to the Green Paper consultation and included very similar evidence.

The evidence submitted to the LGH Committee has helped to develop our understanding of adequate housing and fair rents. Following the LGH Committee recommendations, we have invited Care and Repair Cymru to our Stakeholder Advisory Group to ensure older people's representation on the group. Additionally, in our response we outlined that we had commissioned Beaufort Research to publish a report into tenant's views on housing adequacy.

Overview of Responses to the Green Paper Call for Evidence

The Welsh Government received a total of 371 completed responses to the consultation.

- 269 of these were received through the online consultation.
- 102 of these were received via email response.

101 of the responses were duplicate responses or very similar responses which were part of a write-in campaign linked to Acorn the Union (one of the responses being from Acorn directly). These responses have been considered as part of the evidence provided. These responses are included under the 'Undeclared/Other' category under the summary of "Respondent Type" below as while it was possible to identify that the responses were linked to a campaign by Acorn, it was not possible to identify the type of respondent in further detail than this. 25 responses were duplicate or very similar responses which expressed disappointment that the Green Paper did not include proposals for a 'Property Act' which would prioritise homes for local people. These responses have been considered as part of the evidence provided and included under the 'Undeclared/Other' category.

One respondent did not answer the consultation questions, but instead provided a video as their evidence to the Green Paper, which outlined some of the affordability challenges for landlords in the private rented sector (PRS). One respondent provided a link to an article against policy on second home ownership and against rent control. This evidence has been noted but has not been considered in detail within the summary. Both have been included under 'Other/Undeclared'.

27 respondents responded to the consultation in Welsh.

Summary of Respondent Type

A summary of the type of respondents is outlined in the table below. Where it was not possible to identify a respondent, they were recorded as 'Other/Undeclared'.

Respondent Type	Number of Responses
Representative bodies	45
Local authorities	12
Political parties	1
Registered Social Landlords	1
Letting Agents/Management Companies	12
Private landlords	90
Industry experts	3
Trade Unions	2
Other/Undeclared	204
Total	371

Responses received via email varied in structure, where some followed the structure of the consultation questions, and some provided a general commentary rather than answering each question. The responses also varied significantly in length and the amount of commentary provided, where some responded to each question, many only responded to some questions, or did not respond to any question directly but provided a general commentary.

Methodology

This document summarises the responses to the 24 consultation questions. Whilst it cannot capture every comment, it tries to convey the key messages. Several matters were raised that did not have a direct bearing on the consultation. We have noted these matters but not considered them in any detail within this summary.

The consultation response form consisted of 24 questions, 22 questions on the subject matter of adequate housing, fair rents, and affordability, and two questions on the effects of this work on the Welsh language. The online consultation response form included four closed 'yes/no' agreement questions and opportunities to provide open-ended responses about the questions.

A thematic approach has been taken to outline respondent's key comments in response to the questions. An approach was taken to consider a 'theme' as a comment mentioned more than once in the responses. It is important to note that the frequency of key themes cannot be used to interpret the balance of views in the

same way that a closed question can. It should also be noted that where a proportion of respondents have commented in support of parts of a proposal, it does not necessarily follow that those not making these comments are opposed to those parts of the proposals.

Summary of Responses

Q1. Do you think that the 7 factors of adequacy are something to aspire to achieving in Wales? If so, what mechanism or combination of mechanisms do you think are required to achieve the 7 factors of housing adequacy in Wales?

278 respondents answered this question. Most respondents provided a commentary as their response, rather than directly answering whether they agree or disagree. It is important to note that some respondents disagreed due to the barriers to implementation in Wales, not that they disagreed with the seven factors of adequacy in principle.

The type of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	44
Local authorities	10
Political parties	1
Registered Social Landlords	1
Letting Agents/Management Companies	4
Private landlords	60
Industry experts	3
Trade Unions	2
Other/Undeclared	153
Total	278

The main themes, views and considerations to this question included:

- Calls to implement a right to adequate housing into Welsh law.
- The need for increased availability of housing (including both PRS and social housing) to achieve housing adequacy.
- How housing adequacy should be considered as part of a wider housing strategy for Wales.
- How housing adequacy should be considered for all housing tenures, rather than just in the PRS.
- To what extent are there already existing mechanisms/levers to achieve housing adequacy and whether implementing this would cause duplication with existing legislation/regulations (for example, the Renting Homes (Wales) Act 2016 was cited as improving security of tenure).
- More detail would be needed on the definition of adequate housing and how the criteria would be defined and measured against, including the need for further data.
- Some of the factors may be considered more of a priority, for example affordability, habitability, and security of tenure.

- The challenge for local authorities to discharge potential functions in relation to housing adequacy, due to concern over funding and resource.

Further observations and comments included:

- The importance of considering the link between housing and health.

Respondent Quotes:

‘...the rental sector is one element of a broad range of tools and interventions that is required to implement adequate housing for all as a fundamental human right.’ – Representative Body

‘... there is already legislation in place from either the UK or Welsh Government’s to achieve the seven factors, and surely it would be more advantageous to concentrate on better enforcement of this current legislation rather than to introduce new legislation. For example, to achieve security of tenure, the Renting Homes (Wales) Act 2016 has introduced increased notice periods for possession via a Section 173 Notice.’ – Propertymark

‘We need to look at housing and its impact on health- rather than looking at the rental sector alone.’ – Representative Body

‘Tai Pawb (and the Back the Bill coalition) see the right to adequate housing and rent controls as two separate policy issues. One being a systematic, long-term, and joined up approach to resolve the housing crisis, with the other being a more targeted (and limited) policy intervention’.- Tai Pawb

Q2. What considerations should be taken into account when establishing a minimum core for Wales against the 7 factors of housing adequacy?

233 respondents answered this question.

The type of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	33
Local authorities	7
Political parties	1
Registered Social Landlords	0
Letting Agents/Management Companies	5
Private landlords	42
Industry experts	3
Trade Unions	2
Other/Undeclared	140
Total	233

The main themes, views and considerations included:

- Support for the 'Back the Bill' position of 'progressive realisation' of the incorporation of the right to adequate housing (RTAH) (how a minimum core would work towards the progressive realisation of housing adequacy).
- A minimum core should consider the International Covenant on Economic, Social and Cultural Rights (ICESCR), ensuring the socio-economic rights of people.
- A housing strategy should be developed which would outline a minimum core and how action will be taken to achieve housing adequacy.
- Further data would be needed to establish a minimum core against the factors of housing adequacy.
- Housing adequacy should be considered across all tenures, including PRS, social housing and owner-occupied housing.
- There should be consideration into the impact of existing legislation and interventions and how this could support progress towards a minimum core (for example, the Renting Homes (Wales) Act 2016 and Fitness for Human Habitation Regulations).
- The Welsh Government should consult with marginalised groups and people with lived experiences of the issues regarding housing adequacy, e.g., older people, people who have experienced homelessness, people with varying immigration status, people in receipt of benefits, disabled people, and young people. A minimum core should consider equality for all groups of people.
- A minimum core should consider how to increase housing supply in both the PRS and social housing.
- When establishing a minimum core, consideration should be given to providing more detail for the local context if there will need to be regional variation in how the factors are achieved (such as urban/rural differences in existing housing stock and infrastructure).
- Rent control should be considered as an aspect of affordability in the PRS.
- There should be minimum legal standards regarding housing conditions.
- There should be incentives to ensure accessible housing for disabled people.
- There should be investment in transport infrastructure to support availability of services.
- There should be community engagement/cultural impact assessments regarding cultural adequacy.
- The improvement of energy efficiency should be considered.
- There should be a ban of no-fault evictions.
- There should be more regular inspections of PRS property.

Further comments and observations included:

- Concern for the potential for unintended consequences, such as any future reform causing landlords to leave the PRS and the negative impact this could have on PRS supply.
- The Welsh Government should consider financial incentives to encourage homeowners to improve their properties, such as council tax relief or Land Transaction Tax (LTT) relief).
- The Welsh Government should consult with landlords/ landlord costs should be considered to ensure they are able to remain the PRS.

- Comments that stated there has been too much government intervention in the sector.
- Comments that stated that measures regarding housing adequacy should not lead to rent control measures.
- Using a minimum core for housing adequacy could be useful for the development of Local Development Plans.
- There should be consideration into the challenge of ensuring all housing stock is adequate, particularly for older housing stock in Wales.
- Further detail on any proposals would be needed to answer.

Respondent Quotes:

‘The Welsh Government should make it clear that a minimum core should be viewed as the minimum essential level of services and that over time, it aspires for housing in Wales to exceed these minimum standards. While the housing sector in Wales is facing significant challenges at the current time, consideration should be given to how standards can be raised once the minimum has been achieved.’ - Cymorth Cymru

‘When establishing the minimum core for Wales against the 7 factors of housing adequacy, consideration should be given to determining a vision of adequate housing. A long-term vision is key to building a shared aspiration for the future of housing and to creating a shared sense of purpose and understanding of tasks and processes that need to be set up and implemented to achieve the vision.’ – Representative Body

‘We believe that incorporating the 7 factors into devolved legislation will allow for joined up policy and strategy to implement long term and long-lasting change.’ – Welsh Women’s Aid

Q3. What type of monitoring arrangements and/or enforcement measures should be available to ensure the delivery of housing adequacy?

225 respondents answered this question. Respondents outlined views on different housing tenures including both the PRS and social housing.

The type of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	30
Local authorities	12
Political parties	0
Registered Social Landlords	1
Letting Agents/Management Companies	5
Private landlords	38
Industry experts	3
Trade Unions	2
Other/Undeclared	134
Total	225

The main themes, views and considerations included:

- Support for the suggested approach to monitoring and enforcement from the 'Back the Bill' proposals by the Chartered Institute of Housing (CIH), Tai Pawb, and Shelter Cymru. These suggestions included the incorporation of a right to adequate housing (RTAH/RAH) and for any monitoring arrangements to demonstrate progress towards the realisation of the right. For example, suggestions included the gathering of data to monitor progress towards a right and the ability for enforceable rights by actions taken by individuals in courts/tribunals (linked to the 'Strengthening and Advancing Equality and Human Rights in Wales' research report).
- Suggestions to look at international examples of how the right to adequate housing has been incorporated and to consider their monitoring arrangements (for example, some countries have appointed a Housing Commissioner/independent body to measure progress).
- There should be consideration into how existing mechanisms can be utilised further where applicable, such as the current enforcement options open to local authorities, Rent Smart Wales (RSW) in the PRS, The Welsh Housing Quality Standard (WHQS) in social housing, the Residential Property Tribunal, the Deposit Protection Scheme, and the Renting Homes (Wales) Act 2016.
- Consideration into whether there is already sufficient legislation and measures to ensure housing adequacy, and whether focus should be placed on the implementation of this, such as the Renting Homes (Wales) Act 2016, rent committees for rent appeals, RSW etc.
- Suggestion to utilise RSW further in the PRS. Suggestions around utilising RSW included:
 - RSW could collect data.
 - RSW could use the ability to revoke a landlord license as an enforcement measure in relation to housing adequacy.
 - RSW could be given further enforcement powers.
 - There should be continued promotion of RSW and efforts to target landlords who remain unregistered.
- Suggestion for a national body to measure progress towards housing adequacy, such as a housing ombudsman (potentially to discern if local authorities have carried any potential duties regarding housing adequacy).
- Penalties to landlords for non-compliance.
- Routine or regular inspections in the PRS by local authorities.
- Concern over additional resource and funding that would be needed to ensure housing adequacy, particularly for local authorities to carry out any duties regarding housing adequacy in the PRS/for any training requirements needed.
- The need for data on progress towards achieving the seven factors of housing adequacy/a minimum core through appropriate indicators.
- Further data would be needed on housing prior to decisions, such as data on the quality of PRS properties, data on homelessness statistics, data at a local level, a Welsh Housing Survey/Welsh housing conditions survey, and tenant surveys.

- There should be reporting into progress towards housing adequacy, and these reports should be publicly available.
- There should be public awareness campaigns regarding tenant's rights/ensure tenants understand their routes for raising complaints/concerns.
- The system for tenants to report issues should be strengthened.
- Further enforcement relating to hazards in the home and the challenge of enforcement of the Housing Health and Safety Rating System (HHSRS).
- There could be a local register which measures against landlord compliance with the factors of adequacy.
- The PRS should be further aligned with the social housing sector, such as by improving data.

Further suggestions included:

- The Welsh Government should work with third sector stakeholders who collect data on individuals' lived experiences such as tenants and members of marginalised communities.
- Enforcement regarding landlords should be balanced with ensuring any measures are not too burdensome on landlords, to prevent landlords from leaving the PRS. Financial support could be provided to landlords.
- Monitoring should focus on the barriers to increasing adequate housing supply.
- Efforts should be focused on increasing housing supply.

Respondent Quotes:

'UN Guidance provides examples of how rights can be monitored, but this is down to each individual country, however "at a minimum, all accountability mechanisms must be accessible, transparent, and effective."- CIH Cymru, Tai Pawb and Shelter Cymru (Back the Bill).

'Incorporation of the RAH is necessary to achieve effective enforcement and would not prejudice the introduction of Alternative Dispute Resolution mechanisms (such as arbitration or reference to the Ombudsperson). However, not incorporating the RAH would, in effect, rule out court-based mechanisms which enable individuals to challenge decisions made in relation to housing which directly affect them, or to hold relevant public authorities fully to account for progress made to realise (progressively) the RAH.' – Professor Simon Hoffman, Professor of Human Rights, Swansea University.

'Ongoing and proactive monitoring and enforcement measures are vital if housing adequacy is to be achieved. As an example of why this matters, the Bevan Foundation's response to the Welsh Government's consultation on the Welsh Housing Quality Standards in 2022 highlighted how properties are currently only assessed for compliance with the Standards at the beginning of a new tenancy. We provided numerous examples of tenants living in properties which were compliant at the start of their tenancy, but as a result of repairs not being undertaken in a timely manner, the property would probably

no longer comply. This had seen tenants lose faith with the system, feeling that the Standards were not there to work for them. –‘The Bevan Foundation

‘Regular assessments of landlords and properties through self-assessments and assessments carried out by a range of partners (not just the Councils but could include other public services such as Fire and Rescue services), spot checks, tenant surveys and having an accessible route for the reporting of any breaches.’ – Wales Safer Communities Network

‘Talking about ‘delivery’ implies an ultimate end point regarding housing adequacy, however we would argue that what is adequate for each person can change over time. A right to adequate housing would mean that Welsh Government would be constantly working towards a minimum standard and deploying use of resource to get there – including adapting delivery to meet changing needs of individuals. This is not a stagnant, tick box exercise. However, monitoring must be incorporated into the Right to provide consistent and useful progress reports. ‘ – Care & Repair Cymru

Q4. Are there any other considerations or potential implications of working towards delivering the 7 factors of housing adequacy you wish to highlight?

120 respondents answered this question.

Respondent Type	Number of Responses
Representative bodies	31
Local authorities	7
Political parties	0
Registered Social Landlords	1
Letting Agents/Management Companies	7
Private landlords	36
Industry experts	2
Trade Unions	0
Other/Undeclared	36
Total	120

The main themes, views and considerations included:

- Comments that the approach taken in the Green Paper did not acknowledge how a right to adequate housing could be incorporated into law.
- Support for the ‘Back the Bill’ position of an incorporation of a right to adequate housing/calls for a right to adequate housing via progressive realisation.
- The Welsh Government should consider the ICESCR when considering how to deliver the 7 factors of housing adequacy.
- The Welsh Government should continue to work with stakeholders in the third sector to ensure lived experience of marginalised groups is at the core of work on housing adequacy.
- The need for further data to monitor progress of towards the factors of housing adequacy.

- Increasing the supply of housing should be seen as a priority/housing supply is the biggest issue in the housing sector.
- There will be wider benefits of working towards housing adequacy, such as benefits to health, savings to the NHS, and increased economic stability.

Further observations and comments included:

- Concern over the funding, resource, and any training needed to deliver on housing adequacy, particularly for local authorities.
- The potential for unintended consequences in the PRS if looking to deliver the 7 factors of housing adequacy, such as landlords choosing to leave the market and reducing the supply of PRS stock, or increased rents.
- There should be increased investment in the housing market and investment should be encouraged.
- Financial incentives should be considered for landlords if they were expected to achieve the 7 factors of adequacy/concern that landlords will be unable to deliver on all the factors of adequacy (e.g. cultural adequacy).
- Consideration should be given to the impact on smaller landlords compared to larger landlords.
- A timeframe for the delivery of housing adequacy would need to provide the opportunity for the PRS market to adapt to any changes.
- Comments that the Local Housing Allowance (LHA) rate is too low, particularly in certain BRMA areas.
- Comments against rent control measures.
- Consideration should be taken to long-term solutions to affordability issues linked to second home ownership and short-term holiday lets.

Respondent Quotes:

‘Taking a rights-based approach will require a whole system review and provides opportunity to develop a housing strategy and action plan to deliver a right to adequate housing covering all seven areas of adequacy.’ - Care & Repair Cymru

‘The timeframes need to be considered to allow the market to adapt to any changes in a manageable way and to manage the demand for specific contractor skills. The Renting Homes (Wales) Act 2016 has recently demonstrated that individuals make decisions on masse when significant changes are made which create uncertainty and risk in business models. Whilst this may not have a significant impact over the long term (still to be assessed) it certainly does create short term pressures presenting as increased demand for accommodation on housing advice services.’ – All Wales Expert Housing Panel

‘We would urge the Welsh Government to consider the seven aspects as ‘enabling devices’ to help to identify and tackle particular barriers that groups and communities face’. – Just Fair

‘Adequate housing is a key building block for a healthy life. Poor quality housing in Wales costs the NHS over £95m per year in first year treatment

costs alone, and the cost to Welsh society is over £1bn. The benefits of working towards delivering the 7 factors of housing adequacy therefore extend far beyond the housing system, with gains and cost savings applying across a number of policy areas and budgets.’ - Representative Body

Q5. Do you agree with the proposal to define “fair” in its broader context?

283 respondents answered this question.

The type of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	27
Local authorities	13
Political parties	0
Registered Social Landlords	0
Letting Agents/Management Companies	10
Private landlords	67
Industry experts	2
Trade Unions	2
Other/Undeclared	162
Total	283

170 said yes and 106 said no, while the rest of the respondents provided a general commentary in their response. However, many of the responses outlined detail in their answers which included caveats to their response and outlined issues regarding the definition of fairness, which has shown the difficulty in defining ‘fair’.

The main themes, comments, and suggestions from this question included:

- Fairness should be balanced between the landlord and the tenant.
- The definition could be unfair to landlords due to their rising costs, such as rising interest rates and management fees.
- ‘Fair’ may be too subjective and too broad of a definition and further detail will be required (particularly on how to ensure fairness for both tenants and landlords).
- Agreement with the definition, but concern that this definition will be used to lead to rent control measures, which would not be seen as fair by landlords.
- Whether the definition should apply on social housing, but not in the private rented sector.
- The definition of ‘fair’ should encompass social justice, equality and wider socio-economic factors.
- Fair should consider location (but responses also identified that looking at fairness in relation to location has the potential to have a detrimental effect due to the possibility of discrimination to lower incomes).
- Fairness should include fairness to lower incomes.
- Fairness should consider socio-economic factors, such as the cost-of-living crisis and inflation.

Further observations and comments included:

- The market determines rent levels/disagreement with government interference on this.
- The potential unintended consequence of landlords leaving the sector if they perceive any reform on the private rented sector as unfair, which will impact on the supply of private rented properties.

Respondent Quotes:

'We agree with the principle of defining 'fair' in its wider context but believe we must ensure people with protected characteristics are not overlooked' – Care & Repair Cymru

'Welsh Government should go further in its ambitions and be clear on how this whole piece of work is framed and to emphasise the push for increased quality and equitable provision across Wales. What this means in practice will need to be considered carefully to ensure equity of provision, recognising that different people will need different levels of support – and this support needs to be available both when and where they need it. For example, we know through our charity partners that there are unique challenges facing different people across Wales, whether that be women who have experienced domestic violence in Pwllheli, refugees seeking new homes in Newport, or young LGBT adults facing homelessness in Carmarthen'. - Lloyds Bank Foundation

'It is going to be difficult to get the "fair" to be equitable for all parties. No system of fair rents should create a situation which falls short of the landlords reasonable required income needed to maintain a healthy property and cover their costs such as mortgages, outgoings/taxes, compliance and produce a yield that makes their investment worthwhile. '-Touchstone Corporate Property Services

'When we consider what fair looks like in the private sector, we also need to be mindful of any possible impact on landlords ensuring that landlords can be encouraged to remain in the market and be part of the solution to solve the rent crisis' – Representative Body

'Whilst a rent cap would seem fair to a tenant it may not be evaluated as being fair for a landlord. Our research into rent regulation in Northern Ireland found that between 41 per cent and 60 per cent of landlords would look to leave the rental market if a rent freeze was brought in. This was due to regulation impacting those landlords with mortgages. A decrease in rental income could make some of these unaffordable resulting in the landlords leaving the market. So, whilst rent control may be seen as being a fair solution to solve affordability issues it is not always seen as fair by private landlords and could result in a significant shrinking of the private rental market. '- CIH Cymru

Q6. What considerations do you think should be taken into account when defining what is meant by fair rents – and how might we avoid unintended consequences?

289 respondents answered this question.

The types of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	30
Local authorities	11
Political parties	1
Registered Social Landlords	1
Letting Agents/Management Companies	11
Private landlords	69
Industry experts	1
Trade Unions	2
Other/Undeclared	163
Total	289

The main themes, suggestions, and considerations included:

- The quality of homes should be considered when looking at fair rents. This included suggestions that rent can be set based on the quality of private rented sector (including energy efficiency and investment in the property)
- Opposition to the definition of fair rents if this would be used as the basis for implementing rent control as a policy intervention.
- Fair rents should be fair to both the landlord and the tenant. Suggestions for what this would mean included that the rent charges must return a profit for the landlord/the landlord must be able to afford the additional costs of performing their duties as a landlord, such as maintaining a property. Two respondents added to this by suggesting there should be financial incentives to encourage landlords to remain in the PRS.
- Fair rents should encompass multiple factors, including household size and composition, Energy Performance Certificate (EPC) rating, lower incomes, local incomes, and all costs relating to housing expenses such as bills, tax, service charges etc.

The main potential unintended consequences identified included:

- If fair rents led to rent control as a policy intervention, there is the risk private landlords will sell their properties and reduce availability of private rented sector supply.
- If rent control was implemented, private landlords may increase their rent incrementally, to account for any potential restrictions on rent increases. For example, the National Residential Landlord Association (NRLA) provided evidence which showed that landlord rent increases are often below the rate of inflation. Therefore, they suggested that if rent controls were introduced and landlords raised the rent to a maximum allowable amount annually, rent controls could increase rents.
- If rent control/a rent cap was set, this could lead to reduced or minimal investment in properties from landlords, leading to a lower quality of PRS stock.

Further comments included:

- There needs to be support for people who struggle to pay market rents. Suggestions included raising the Local Housing Allowance (LHA) rate and that fairness should be linked to ensuring the LHA rate is fair.
- The model of rent control in Scotland could be used as a case study for how rent control caused higher rents.
- More data will be needed to define fair rents.
- Further detail will be needed for any definition of fair rents.
- Any definition of fair rents needs to be dynamic in response to changing interest rates/economic change.
- There could be stronger regulation of landlords, potentially via the submission of rent information.

Respondent Quotes:

'In London many homes were converted into 'studios' and a minimum rent was set via the Local Housing Allowance. A fair rent should be based on floorspace of the property and EPC ratings should be part of this. In Paris, rent controls are in place and rents are set on a per square metre basis and other factors considered such as age of the property impacting on the maximum rent chargeable'. – Representative Body

'There is the threat of an increase in landlords exiting the rental market due to their investments no longer seeming financially profitable (though the idea of profiting from housing does not support any of the seven principles proposed by the UN). This is a potential negative unintended consequence on the housing sector, although the Bevan Foundation has suggested that there is very little evidence that this is the case. – Care & Repair Cymru

"For rent to be fair, it can't just be based on one thing, one outgoing, because that is not the reality of manging a home.... how can you set one policy when it is all so subjective?" – quote from a tenant as part of TPAS Cymru Focus Group.

'Any definition should, in addition to fairness, include "reasonableness". If Landlords are unable to charge a reasonable rent - which covers their costs and provides a reasonable return on their investment, they will withdraw from the private rented sector. This would be a very clear unintended consequence' - Other/Undeclared

'The problem is that there are multiple factors at work here: wages, landlord costs, local demand, local wages and 'desirability'. Either you have a 'fair' rent which, as is mostly the case in such things, a crude 'best fit' which will be great for some, ok for most and unacceptable for others or you will get bogged down in a matrix of local and national statistics of wages, expenses and rents'. – Other/Undeclared

Q7. What considerations do you think should be taken into account when defining “local incomes” – and how should it be defined?

There were 253 responses to this question.

The type of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	31
Local authorities	9
Political parties	0
Registered Social Landlords	1
Letting Agents/Management Companies	8
Private landlords	55
Industry experts	1
Trade Unions	2
Other/Undeclared	146
Total	253

The main themes, considerations and suggestions from respondents included:

- 'Local incomes' could be explored by looking at averages of incomes within local authority areas.
- 'Local incomes' could be explored by looking at data on inequality across local authority areas.
- Office for National Statistics (ONS) data could be used to define 'local incomes'.
- Affordability could be defined as a percentage base of income spent on rent, rather than looking specifically at 'local incomes'. For example, exploring whether 30% of household income on rent should be an indicator of affordability.
- Data on defining 'local incomes' may need to be more specific than just by local authority or by Broad Rental Market Areas (BRMA).
- Whether there should be a focus on lower incomes rather than 'local incomes'. (for example, three respondents suggested to consider the Welsh Index of Multiple Deprivation which explores income deprivation by local area).
- It may be challenging to define 'local incomes' due to individual differences of people within a local area. Examples for such differences were:
 - Household size
 - Incomes of young people
 - Income which is separate to salaried income, such as student loans and benefits
 - Employment within an area
 - Salaries for self-employed people
 - Caring responsibilities
 - Bills
- The challenge of defining local incomes due to individual differences and the link to wider equality issues that need to be considered.

Further observations included:

- Defining 'local incomes' may be complicated, difficult to define and measure, and costly to implement.

- Whether it is appropriate to consider ‘local incomes’ regarding the private rented sector, which operates as a free market.
- The potential for unintended consequences of looking at regional/local averages.
- There should be engagement with experts in the housing sector, particularly the third sector, if looking to define ‘local incomes’.

Respondent Quotes:

...our affordability assessment is designed on the principle that rent is unaffordable if customers on low incomes spend more than 28% of their income on their rent.’ – Newport City Homes

‘Areas of different affluence should be noted- deprivation and wealth in close areas.’ – Other/undeclared

‘There are significant limitations to using data on “pay” as a proxy for “incomes”. First, employee data does not give us a full picture when it comes to incomes. It does not take into account incomes that people receive through benefits, through pensions, dividends, or the incomes of self-employed workers, or if several people in a household work.’ – The Bevan Foundation

‘A focus on local incomes makes sense on a macro level but also incomes differ for certain communities of people. e.g. sole parent families, refugees, disabled people, or people from diverse communities are more likely to have a lower income than average. These lower incomes could be due to a range of socio-economic factors including health conditions, wider inequalities or through domestic abuse. Need to account for these differences in income to prevent further entrenching disadvantages for groups of people.’ – Tai Pawb

‘Area-based deprivation measures which look at the distribution of deprivation are often used to target interventions. Research shows that defining local incomes using an area-based measure may be an inefficient way of improving affordability for households. (Not all households experiencing income deprivation will live in deprived areas). The Welsh Index of Multiple Deprivation (WIMB) can link poorly with income deprivation in an area- 62% of income-deprived people were missed when looking at the 20% of the most deprived areas.’ – Representative Body

Q8a. What measures should be used to assess affordability, and why?

246 respondents answered this question.

The types of respondents are outlined below:

Respondent Type	Number of Responses
Representative bodies	26
Local authorities	11
Political parties	0
Registered Social Landlords	1

Letting Agents/Management Companies	10
Private landlords	51
Industry experts	2
Trade Unions	2
Other/Undeclared	143
Total	246

The main themes, considerations and suggestions from respondents included:

- Receipt of LHA allowance and other housing related benefits should be included in any measure of affordability.
- The LHA rate may be insufficient and need to be adjusted to reflect the reality of market rents, particularly in response to the cost-of-living crisis and inflation.
- Affordability could be measured by the number of properties available to rent at or below the LHA rate, or the market cost of an area compared to the LHA rate.
- Affordability could be measured by 30% of household income on rent- the ONS measure of affordability.
- Considerations into when using a 30% metric is unsuitable.
- Affordability should not include benefits as income when looking at income-based affordability measures (for example, disability benefit).
- Affordability could be measured by the Joseph Rowntree Foundation 'living rent' model.
- Affordability for single people can be an issue as they can be disadvantaged when 'household' income is used as a measure of affordability.
- Affordability measures should consider landlord costs and their viability to remain the PRS- such as the rent charged compared to their mortgage cost, interest rates, cost of letting agents, cost of compliance with legislation, and other related costs.
- If affordability measures led to setting a rent at 30% of household income, this would have the potential for unintended consequences, such as reducing the quality of PRS stock and reducing supply of PRS stock.
- Affordability should consider the energy efficiency of properties.
- Affordability should consider local incomes/average wages in areas.
- Affordability should consider the type of property, including size and quality.
- Affordability should consider the circumstances of households and household composition, such as household size, age, disability, access to services, financial circumstances etc, as what would be affordable for one household is unaffordable to another.
- Affordability should consider other housing costs in addition to rent, such as bills, council tax and insurance.
- Affordability should be measured by an income to rent ratio.
- Measures should consider affordability for lower incomes as the 30% metric does not reflect the reality for people on lower incomes. Affordability could consider a median income ratio of lower incomes.
- An affordability formula/index should be developed (this formula could potentially indicate when financial support is needed for people on lower incomes).

Further comments included:

- Statements on the difficulty of measuring affordability and/or disagreement of using measures of affordability within the PRS.
- Suggestions that affordability should be decided by the renter and the landlord, without government intervention.
- Further data would be needed to effectively measure affordability in the PRS.
- There should be a focus on improving the supply of housing, which will improve affordability in the sector.

Respondent Quotes:

'Local Housing Allowance is a useful benchmark, since this is the figure which is built into people's Universal Credit award. However, it is no longer closely linked to the real housing market, as it is not routinely updated in accordance with open market rents. A very small proportion of Welsh (or UK) rents are even within LHA + 10%'. – Carmarthenshire Council

'The lack of consensus on the issue of calculating affordability demonstrates why we need to better understand how housing affordability impacts on lower income households before adopting particular definitions.' - Cymorth Cymru

'RBL has long called for military compensation to never be treated as income when assessing eligibility for Housing Benefit'. – Royal British Legion

'Amongst our debt clients who rent privately, those in the highest income bracket spent on average, 21% of their income on rent and of those on the lowest income bracket, they spent 62% on average'. - Citizens Advice Cymru

'Determining affordability in an area and informing consequent policy interventions should be informed by data on the rent to median-income ratio of low-income private renters as well as overall ratios and averages.'
Other/Undeclared

'We would propose that any calculations on fair rents should take into account any wider economic factors that could impact rents. For example, runaway mortgage rates due to global economic changes have in some cases led to rents rising in order for landlords to keep up with buy-to-let mortgage payments.' - PayProp UK

'Differences in inequalities and deprivation between urban and rural areas in Wales should also be considered.' – Representative Body

Q8b. Do you agree that 30% of a household's income is an appropriate indicator of affordability?

275 respondents answered this question. 155 answered yes and 109 said no, while the remaining respondents did not answer directly but provided a commentary of their views in their response.

The types of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	24
Local authorities	10
Political parties	0
Registered Social Landlords	1
Letting Agents/Management Companies	9
Private landlords	67
Industry experts	2
Trade Unions	2
Other/Undeclared	160
Total	275

The main themes from respondents who said yes included:

- 30% of a household's income is an industry standard, and therefore is a useful benchmark for assessing affordability.
- It is a recognised percentage by ONS.

The main themes from respondents who said no included:

- Affordability depends on individual circumstances and cannot be defined by a percentage for all people. For example, affordability for a single person compared to a parent will differ massively.
- Basing affordability on 30% is unfair to those on lower incomes, as 30% of a household income for a household on a higher salary could lead a significant amount of income left, whereas 30% for a lower income household could put them into poverty.
- A higher percentage may be a more realistic indicator of affordability, due to the increased cost of rents.
- Any percentage is an arbitrary figure and may be too blunt a tool to measure affordability.
- Household income can change over time, including during a tenancy.
- It may be unrealistic due to the increased cost of living.
- Using a percentage as a measure of affordability would not be appropriate when considering local incomes.
- One response suggested a Welsh Housing Survey could look at creating a Welsh criterion of affordability.
- TPAS Cymru, in collaboration with Single Parents Wellbeing, produced a report which draws on data from renters in Wales, and found that almost 65% of respondents agreed with the 30% measurements. The two key themes from 35% of respondents who felt that this wasn't an appropriate indicator was that the current cost of living makes 30% on rent unaffordable, and the setting of one affordability percentage leads to unfair bias.
- Further work is needed to ensure that Local Housing Allowance (LHA) reflects market rates.
- The Joseph Rowntree Foundation provides an estimation of affordability which should be considered.

Respondent Quotes:

'With so many renters paying above this, particularly those on lower incomes, the 30% of income threshold could be perceived as being fairly meaningless in the current climate. However, we believe having a threshold does help to provide an important barometer of affordability in the rental market, for both private and social renters. We suggest it could be useful to also have an additional, higher threshold, such as 40%, to help capture the number of households who spend a greater proportion of their income on housing - similar to thresholds used to monitor 'fuel poverty' and 'severe fuel poverty'. This would give a more detailed picture of housing affordability in Wales.' – Citizens Advice Cymru

'The 30% measure is arbitrary and for very low-income households potentially leaves tenants without enough income for food and heating.'
– The Bevan Foundation

'Households on the lowest incomes typically spend the largest proportion of their income on renting costs, so any reduction from the current average of nearly 40% will be beneficial' – The Wallich.

'The 30% of household income as an indicator of housing affordability may be considered to be the best that we currently have but it is time to review how accurately it reflects reality.' – Representative Body

'There are limitations to all established mechanisms of affordability assessment and expert understanding of the detailed context is vital to accurate and meaningful assessment. With this in mind, Crisis suggests that the Welsh Government commissions further specialists research to develop a mechanism appropriate for the Welsh context' - Crisis

Q9. Can you provide any additional data or evidence which has not been considered?

91 respondents answered this question.

The type of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	11
Local authorities	5
Political parties	0
Registered Social Landlords	0
Letting Agents/Management Companies	7
Private landlords	40
Industry experts	1
Trade Unions	0
Other/Undeclared	27

Total	91
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The main themes, considerations and suggestions from respondents included:

- Landlord costs and reasons why landlords are leaving the PRS.
- Data on the impact of the rent control measures implemented in Scotland.
- International examples of rent control measures which have been considered unsuccessful.
- ONS data.
- The impact of the lack of housing supply on the issues in the PRS, including the shortage of social housing.
- NRLA evidence on what the impact would be of rent control measures on the PRS.
- Evidence on affordability issues and measuring affordability, such as the Joseph Rowntree Foundation measures of housing affordability and the Bevan Foundation report into the shortage of rental properties for low income households.

Respondent Quotes:

‘The Bevan foundation has produced a report on the Local Housing Allowance and the private rental market in Wales which concludes that “There is an acute shortage of properties available for rent for low-income households in the private rental sector in Wales. Across Wales, as of February 2023, just over 1 in 100 properties were advertised for rents that were at or below LHA. Nearly 75 per cent of Welsh local authorities did not have a single property available at LHA rates”. ‘- Flintshire County Council

‘Research has been undertaken in San Fransisco, Berlin & Sweden which provide evidence that rent controls are barriers to mobility, reduced the supply of homes, & led to higher rents than may have otherwise occurred. All of these factors would have had significant negative impacts on the tenants with the lowest incomes’ – Management company

Q10. Do you agree that better data on incomes and affordability is necessary to inform policy interventions – and how could this data be obtained?

230 respondents answered this question. 157 respondents agreed with the question and only 30 said no, while remaining respondents just provided commentary as their response.

The type of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	20
Local authorities	12
Political parties	0

Registered Social Landlords	1
Letting Agents/Management Companies	11
Private landlords	52
Industry experts	2
Trade Unions	1
Other/Undeclared	131
Total	230

108 responses called for a Welsh Housing Survey to provide this data.

The main themes from respondents who agreed better data is needed included:

- The data should be obtained on a national level, led by the Welsh Government.
- Information could be obtained by local authorities- and this information could be useful for measuring progress towards achieving affordability in the PRS.
- Research could be carried out with third sector organisations.
- Data on a local level is needed on incomes and local rent prices.

The main themes from the 30 respondents who disagreed with better data included:

- Market rates should define affordability.
- There should not be any delay ahead of policy intervention to improve affordability.

Some of the suggestions for how this data could be obtained included:

- HM Revenue and Customs (HMRC) data on rental income
- ONS data on rent levels
- Data on tenant affordability, including the cost of bills.
- Existing data, such as data on benefits from the Department of Work and Pensions (DWP) to measure affordability.

Respondent Quotes:

‘Yes, although there is already data available on the private rented sector in Wales, there is very little data available at a local level, which one could argue is one of the reasons for the incorrect grouping of [the local authority] BRMA. Where data is available at a local level this is not always accessible’. - local authority

‘The NRLA is calling for the introduction of a Welsh Housing Survey. This would be the equivalent of the English Housing Survey, which collects data from across the housing sector – including information on rent levels - to ensure policy is developed against a solid evidence base.’- NRLA.

‘It is evident from the number of individuals struggling to make ends meet during the cost of living crisis that urgent intervention from Welsh Government is needed. It is vital not to delay critical policy decisions for the sake of collecting concrete quantitative data, when the evidence of the crisis can be seen across Wales. NUS Wales would say, however, that any immediate policy

interventions (i.e. rent controls) are sticking plaster solutions. They are desperately needed, however they are not long term solutions. Following immediate intervention, it is important to develop a plan to prevent the exacerbation of the housing crisis at the end of any controls.’ – NUS Wales

Q11. What data do you consider needs to be captured on rents and relevant affordability factors, at what scale, and how often?

195 respondents answered this question.

The type of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	22
Local authorities	9
Political parties	0
Registered Social Landlords	0
Letting Agents/Management Companies	6
Private landlords	34
Industry experts	1
Trade Unions	2
Other/Undeclared	121
Total	195

The main themes, considerations and suggestions from respondents included:

- Data analysing the LHA rate and the comparison to market rents.
- Local data including LHA data, rental market data, household incomes, and data for each local authority.
- Data from local authorities should be collected annually.
- Data on rent information (suggestions included that the rent information should be logged by landlords on RSW).
- RSW should be utilised for data collection, including data on rent information and the quality of PRS housing.
- Property portals such as Rightmove and Zoopla should show if a property was let at the advertised/asking rent or if the agreed rent was lower.
- Data should be acquired by a Welsh Housing Survey, like the English Housing Survey.
- Any data collection should be Welsh specific, and not use English data to make any decisions on any future interventions.
- Data on the quality of PRS homes/bringing quality to the same standard as social housing.
- Data on the energy efficiency of PRS housing.
- Data on landlord costs/equity between landlords and tenants, including consideration into ensuring affordability measures do not impact on the ability of a landlord to meet their mortgage payments.
- Data on the availability of social housing.

- Data should be captured annually (but responses did not indicate what type of data in particular).

Respondent Quotes:

‘Rental data needs to be at the smallest geography possible to reflect local characteristics. This could be obtained from the property portal websites who can provide information on advertised rents and date provided by large agents and landlords on a quarterly basis showing rents achieved when a property was let’. – Propertymark

‘If administered correctly, Rent Smart Wales could provide an online portal where landlords can update details on their dwellings in relation to the amount of rent charged per dwelling and deposit required, along with the type and location of dwelling’- local authority

‘Ideally access to portals such as Rightmove or Zoopla would be best in that it provides a current snapshot of activity. It may need to be enhanced to confirm that property let was let on the advertised rent. The likelihood of landlords and agents providing the information through a registration scheme is unrealistic. Many landlords fail to update the details in the registration for the whole of the 5-year period’. – All Wales Housing Expert Panel

Q12. Are there other considerations and potential impacts (including other data sources) you wish to highlight in regard to the current and future private rental market?

135 respondents answered this question.

The type of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	20
Local authorities	10
Political parties	0
Registered Social Landlords	0
Letting Agents/Management Companies	10
Private landlords	55
Industry experts	2
Trade Unions	1
Other/Undeclared	37
Total	135

The main themes, views, and considerations included:

- The shortage of housing supply, both in the PRS and in social housing. This included comments that said the PRS cannot be looked at in isolation within the housing sector.

- The impact of short term/holiday lets on the PRS and policy interventions to regulate holiday lets.
- The impact of empty homes on availability of housing.
- Considerations into providing incentives for landlords to remain in the PRS. For example, one response suggested that Welsh Government should support 'accidental' landlords, such as people who inherit properties, to continue their investment in the PRS.
- Considerations into how to prevent smaller landlords or 'accidental' landlords from exiting the PRS due to the costs of being a landlord.
- Consideration into landlord costs and how to ensure equity for both landlords and tenants (such as considering the impact of increased interest rates on landlords).
- Statements on the need to increase investment in the PRS.
- Concern over the impact of any potential rent control measure on the supply of PRS stock/statements against the introduction of rent control measures.
- International examples of rent control measures as evidence of rent control being an unsuccessful intervention.
- Reference to the British Property Foundation report into the effects of rent control in Scotland.
- The need to increase energy efficiency of PRS stock. This included how to support landlords to undertake works needed to improve the EPC rating of their property.
- Reference to research from The Bevan Foundation which has shown that landlords are concerned they do not have the correct skills to support tenants who have additional needs and therefore would prefer to let to individuals who are not in receipt of benefits, and the impact of this on already marginalised groups.
- Statements from landlords expressing their intent to sell, evidence provided of research which has shown a high level of landlords who intend to sell, and evidence that there is low landlord confidence in the sector. This included reference to evidence from NRLA's landlord confidence index that states landlord confidence in Wales is the lowest in the UK.
- Calls for an assessment of the impact of The Renting Homes (Wales) Act 2016 on the rental market. Examples of suggested impacts included increased possession claims.

Respondent Quotes:

'Research from the Bevan Foundation has highlighted that many landlords have concerns that they do not have the correct skills to support tenants who have additional needs, and therefore would prefer to let to individuals who are not in receipt of benefits 28. We believe that in order to work towards to achieving the right to adequate housing, there must be a commitment to ensure that those within the private sector understand the impact that only renting to specific tenants can have on groups that are already marginalised'.
 - Welsh Women's Aid

‘There is a need for a whole-systems approach to housing supply and quality that recognises that the private rental sector is only one part of the wider housing system, and must not be considered in isolation from or distinct from it, since these are interconnected parts of a larger system, which impact on one another in complex and sometimes difficult to predict ways (the history of the Right to Buy policy being one case in point here).’ - Faculty of Public Health

‘The NRLA’s landlord confidence index supports the argument that the Welsh Government should be looking to incentivise landlords to stay in the sector as well as enticing more entrants into the PRS in Wales’. – Private Landlord

Q13. What other sources of data on rent might we draw on to inform policy development and future monitoring and evaluation?

78 respondents answered this question.

The type of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	14
Local authorities	9
Political parties	0
Registered Social Landlords	0
Letting Agents/Management Companies	7
Private landlords	26
Industry experts	1
Trade Unions	0
Other/Undeclared	21
Total	78

The main themes, views, and considerations included:

- Considerations into landlord costs, such as mortgage payments/ increased interest rates, financial profit of their investment, and concerns of landlords exiting the market. Suggestions for data sources included HMRC tax data.
- Rent information should be shared more with Rent Officers to provide more accurate data on actual market rents.
- Data from property marketing sites such as Rightmove and Zoopla.
- Calls for a Welsh Housing Survey.
- Suggestions that RSW could publish rent information by requiring landlords submit this information. It was suggested that rental figures could be provided at the start of a new tenancy and for any rent increases.
- Data on household incomes.
- Data on individuals in receipt of LHA in the PRS.
- Data on those with lived experiences of living in PRS properties and those who have been excluded from the PRS market, obtained from data collected by third sector organisations.
- Data from tenants.

- Data from letting agents.
- Further data should be obtained via a central system.
- Availability of PRS properties compared to those looking to access PRS property.
- Data on the availability of social housing and calls generally to increase the availability of social housing.
- Data on landlord behaviour, including statements that included that landlords do not tend to raise rents within a tenancy and will reset the rent to market rates at the start of a new tenancy.
- Statements against rent control, and reference to the Scottish model of rent control as a data source.

Respondent Quotes:

‘To improve the Welsh Government’s understanding of rent levels across Wales, they should create a Welsh Housing Survey to gather information on rent levels achieved to let a property and use data from the online property portals, such as Zoopla, On the Market and Rightmove more effectively to create a clearer picture of advertised Welsh rental levels.’ – Propertymark

‘The lack of reliable data in relation to private sector rents has long been a concern for us. Robust data collection is essential to inform future policy decisions and monitor their impact.’ - Representative Body

‘The views and lived experience of those living in private rented properties, as well as those who are or have been excluded from the private rental market including those in the temporary accommodation (e.g. due to unaffordability, lack of supply, lack of adequate or suitable options, or discrimination) and other forms of insecure housing and homelessness will be crucial to understanding the state of the private rental market as it currently stands in Wales.’ – Faculty of Public Health

‘Sharing up to date information on rents with the VOA (the rent officer) may lead to more accurate figures on rent in the private rented sector’. - Private Landlord

Q.14. Do you think there should be a requirement to provide rent information to Rent Officers?

263 respondents answered this question. 158 said yes and 98 said no to this question, while the remaining respondents provided commentary as their response.

The type of respondents to this question are outlined below:

Respondent Type	Number of Responses
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Representative bodies	21
Local authorities	11
Political parties	1
Registered Social Landlords	1
Letting Agents/Management Companies	9
Private landlords	61
Industry experts	2
Trade Unions	2
Other/Undeclared	155
Total	263

The main themes, suggestions and considerations from respondents who agreed this should be a requirement included:

- Proving rent information should be a mandatory landlord licensing condition.
- This should be a mandatory requirement to ensure that the LHA rates reflect market rates.
- Private landlords could be asked to provide rent information at the start of a tenancy and whenever there is a rent rise within a tenancy to support better data collection on rent levels.
- This would ensure transparency and fairness in the rental market.
- There should be a central database for this information (often, Rent Smart Wales was suggested for this).

The main themes, suggestions, and considerations some respondents who disagreed included:

- Mandating providing rent information could be a breach of confidentiality of an agreement between the private landlord and the tenant/a potential breach of data protection law.
- Disagreement with any form of interference in the free market.
- The cost of introducing such a requirement, for both landlords and for the Welsh Government.
- Issues of resources on introducing such a requirement, particularly on the amount of Rent Officers in Wales.
- Concern with the increased burden on private landlords by imposing a requirement.

Further comments and suggestions included:

- This should be voluntary/non-mandatory.
- It may not be possible to prove any information submitted by landlords is accurate/it would be challenging to ensure landlords comply.
- Whether tenants should be asked how much they pay in rent, rather than landlords.
- Providing rent information may provide a more accurate picture of renting (as arguments for rent controls are often based on the cost of new lets rather than in-tenancy rent rises).

Respondent Quotes:

'Data on the true cost of letting is often skewed, as it focuses on the rent for new rental listings, reported from online marketplaces such as Rightmove and Zoopla. Whilst these are the most up to date numbers on the market value of a new tenancy, this doesn't reflect the costs for ongoing tenancies which are typically below market rents. We know from our own research that generally landlords do not raise rents within the term of a tenancy, and instead make any changes to rent levels between tenancies to reflect the market rent at the time. It would be wrong to create rent control policies from incomplete data, based only on the cost of new lets. To address this, we propose landlords should be asked to provide rent information at the outset of a tenancy, and whenever rent level changes within that tenancy.' - NRLA

'The provision of rent data to the rent officer is currently voluntary. There is a need for this requirement to become mandatory as part of a landlords licensing obligations. This data will then enable accurate assessment of the affordability of the private rented sector, including the ongoing impact of the Local Housing Allowance freeze. This data could also assess the impact of any wider economic impacts such as rising mortgage rates and whether there is a direct correlation to increased rental levels.' –CIH Cymru

'Yes, as it is essential that LHA levels are reassessed accordingly in order to achieve affordability in the private sector'. – local authority

'As demonstrated in Scotland, there is a risk that without sufficient rental data, policymaking is made on perceived assumptions. While in some circumstances that is expected, reporting rent information can help provide a more evidence-based approach towards future policy making'. - Royal Institution of Chartered Surveyors (RICS)

Q15. How do you think such a requirement could be enacted and enforced?

173 respondents answered this question.

The types of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	14
Local authorities	7
Political parties	0
Registered Social Landlords	0
Letting Agents/Management Companies	6
Private landlords	25
Industry experts	1
Trade Unions	1
Other/Undeclared	119
Total	173

The main themes, suggestions and considerations from respondents included:

- Landlords should have to submit rent information at the start of a tenancy and whenever there are rent increases, with fines/penalties for non-compliance. Suggestions for monitoring this included RSW and Rent Officers.
- Via RSW. Suggestions for how RSW could be utilised for this included:
 - Landlords should be required to submit rent information to RSW.
 - Making submitting rent information a condition of a landlord license, with a penalty for non-compliance. This could be a condition upon registration.
 - RSW could be used as a central database of rent information.
- Via a centralised system/agency/department for rent monitoring, such as by logging rent information at the start of a tenancy and updated as rent information changes.
- Providing rent information should be a statutory duty.
- There should be clear guidance for any duties to landlords.
- An issue identified with submitting rent information is that it would not account for if a rent was higher due to a refurbishment/renovation or improvements to energy efficiency.
- Letting agents should provide information on rents to support rent information on market rents.
- Inspections could be utilised to verify the rent information provided is correct.

Respondent Quotes:

'The Welsh Government should consider introducing a legal requirement for all landlords to provide rent information to Rent Officers. Analysis by Crisis and Zoopla and The Bevan Foundation shows that limitations in rent officers' datasets is leading to unreliable estimates of the real cost of renting'. – Crisis

'Rent level information should be collected by Rent Smart Wales at the point of registration and through an annual review process, with failure to do so resulting in the revoking of landlord licences.' - Representative Body

'The requirement to provide rent information to rent officers should be mandatory as part of the licencing conditions. It should be provided at the start of the tenancy, then annually.' - CIH Cymru

'Consideration should be given to different options for this, including a consultation with relevant parties and tenants' representatives, but this could make use of tenancy or lodger agreements.' – Faculty of Public Health

Q16. Should such a requirement apply to all landlords or only some, perhaps larger, landlords? Why?

197 respondents answered this question. 138 respondents said the requirement should apply to all landlords, 9 said it should apply to only larger landlords, while the remaining respondents provided a general commentary as their response.

The type of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	17
Local authorities	11
Political parties	0
Registered Social Landlords	1
Letting Agents/Management Companies	9
Private landlords	32
Industry experts 1	1
Trade Unions	1
Other/Undeclared	125
Total	197

The main themes, suggestions and considerations from respondents included:

- If such a requirement was introduced, it should apply to all landlords to ensure the data captured is accurate and to provide a consistent data set.
- It would be challenging to create a definition of a larger landlord.
- Whether such a requirement should apply to letting agents.

Respondent Quotes:

‘From research undertaken by NUS Wales, and from speaking to students, it is clear that the typical landlord who targets students often owns a swathe of properties in a specific area, and is more likely to exploit their tenants for financial gain (e.g. unreasonably withholding deposits). This is as a result of there typically being very few options for students, and students traditionally being less aware of their rights and thus less able to hold their landlord to account.’ – NUS Wales

‘It should apply to all equally. Landlords with small rental property portfolios make up the vast majority of the market. By excluding them, the data set would be weakened beyond usefulness.’ - Grainger PLC

‘Where would the cut off lay for the numbers to be classed as a larger landlord? This would need careful consideration’ - Newport City Council

‘The CLA does not support a requirement to provide information to Rent Officers. Any requirements for landlords must be applied equally across the whole sector, including social housing. It would not be equitable to apply the requirement to only some landlords. There are issues around defining ‘larger landlords’, and any definition would result in an arbitrary cut off point between which landlords are and are not covered by such a requirement. This could result in landlords choosing to restrict the number of properties in their portfolio to remain under the threshold, which may therefore reduce the number of properties being added to the PRS’ Furthermore, if only ‘larger landlords’ were required to provide data to

Rent Officers, it would mean that the data available to Welsh Government via Rent Officers would not be an accurate reflection of the sector, which could result in policies being developed based on unreliable evidence.’. - Country Land and Business Association

Q17. What do you consider to be the advantages and/or disadvantages of first, second, and third generation rent control measures?

230 respondents answered this question.

The type of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	21
Local authorities	9
Political parties	1
Registered Social Landlords	0
Letting Agents/Management Companies	11
Private landlords	54
Industry experts	1
Trade Unions	2
Other/Undeclared	131
Total	230

While comments on the advantages and disadvantages of first, second, and third generation rent control measures were provided, often respondents engaged with this question by providing their views on rent control measures generally, rather than providing comments on the specific generations of rent control.

The main themes and comments from respondents who provided views on the advantages to rent control measures generally included:

- Rent control could control affordability for tenants and provide protection to tenants.
- Controlled rent increases could prevent landlords evicting tenants to either sell or allow for rent increases.
- A temporary rent freeze could be a useful short-term measure in times of economic crisis.
- Rent stabilisation could be used as part of a wider package to support tenants.
- A model which allows set rent increases within a set period could be the most effective model.

The main themes and comments from respondents who provided views on the disadvantages to rent control generally included:

- Rent control could reduce supply of PRS housing as landlords will exit the market.
- There should be a focus on increasing housing supply, rather than implementing rent control.

- If rent control was implemented, it should be only one mechanism to secure adequate housing- there should be a focus on increasing supply of housing.
- There could be reduced investment in maintenance and repairs if private landlords have no financial incentive to maintain or improve a property, leading to reduced quality of PRS accommodation.
- Change in landlord behaviour: landlords may increase rents more than they would have before the threat of a rent cap or if a rent ceiling was introduced.
- Consideration into rent control in Scotland. Respondents who used the example of the implementation of rent control in Scotland outlined:
 - Surveyed landlords in Scotland expressed they intend to sell their properties following rent control in Scotland.
 - Scotland has experienced the highest levels of rent increases in the UK following the implementation of rent control.
 - Rent control in Scotland was unsuccessful as landlords were able to re-set the rents for new tenancies.
- International examples of when rent control was considered unsuccessful.

First Generation rent control

The themes and comments from respondents who outlined the advantages of first generation rent control measures included:

- First generation rent control can be useful in times of extreme financial hardship.
- First generation rent control is the most easily understood form of rent control and less likely to be liable to legal loopholes.

The themes and comments from respondents who outlined the disadvantages of first generation rent control measures included:

- First generation rent control could lead to private landlords leaving the PRS and will reduce the supply of PRS properties.

Second Generation rent control

The themes and comments from respondents who outlined the advantages of second generation rent control included:

- Second generation rent control could provide a financial incentive for landlords to improve their property if rents were controlled based on quality.
- Second generation is easily understood and less likely to be liable to legal loopholes.
- Second generation has been used in other countries and has a broad base of support.

The themes and comments from respondents who outlined the disadvantages of second generation rent control measures included:

- Rents could still rise and be unaffordable- this model would still allow private landlords to raise the rent and therefore does not address the affordability challenges.

- Second generation models could produce a two-tier rental market and force lower income households into poor housing.

Third Generation rent control

The main themes and comments from respondents who outlined the advantages of third generation rent control models included:

- Third generation models could provide an opportunity to take local factors into account.
- Third generation may be considered the most acceptable model to private landlords as it provides them the ability to return their rent to market value when the tenancy changes.

The main themes and comments from respondents who outlined the disadvantages of third generation rent control models included:

- There will be a challenge of measuring and determining the market rate.

Respondents also provided general observations and comments on rent control measures generally, which are outlined below:

- More data would be needed (particularly local data) to determine if a rent control measure should or not should be implemented/there is currently not enough evidence to recommend a particular rent control measure.
- Private landlords could be provided financial incentives to improve properties.
- General disagreement with the concept of rent control and the view that market rates should determine rent levels.

Respondent Quotes:

'It is important to note that rent controls are only one mechanism that could secure a path towards Adequate Housing. Questions around the supply and availability of housing are just as important when it comes to boosting affordability.' – The Bevan Foundation

'As a result of rent controls, landlords may spend less on maintenance and repairs which could lead to poorly maintained properties. This could be the case if the rent controls reduced their rental income, resulting in less money to maintain their properties. Additionally, there could be a reduced financial incentive to maintain or improve the property if the rents chargeable were controlled by government, rather than responsive to the condition of the property. The above would affect all local authorities across Wales, however, more acutely for [this local authority], due to a relatively high proportion of pre-1919 homes with poor energy efficiency' - local authority

'We do not feel in a position to advocate for any one approach to rent control measures until we have a clear strategic direction from Welsh Government on its view of the sector's overall purpose, and its place within future strategy'. - Representative Body

‘NUS Wales sees the immediate benefit of first generation rent controls for tenants – it is clear from both the media and personal testimony that rent, both at its current levels and at the current rate of increase, is causing significant challenges for individuals as they aren’t able to afford to rent properties. For students, the area in which they rent is vital so they are able to access their education. As a result, freezing rents, or installing a strict price ceiling, would create stability and prevent individuals from having to leave their homes.’ – NUS Wales

‘We feel that while Rent Control, as a solution of and on its own (and without other interventions), may have a short-term value in emergency situations, limiting increases and protecting tenants income. However, without addressing the supply, quality and accessibility of homes, we feel it will only have a limited impact on the overall challenges tenants are facing in the long term as these (and other) factors contribute to the cost of housing as well as the level of rent.’ - Tai Pawb

Q18. What factors should apply to determine if a rent control measure is required?

220 respondents answered this question.

The type of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	16
Local authorities	10
Political parties	0
Registered Social Landlords	1
Letting Agents/Management Companies	11
Private landlords	48
Industry experts	1
Trade Unions	2
Other/Undeclared	131
Total	220

While respondents did provide comments relevant to the question, often respondents included comments on their views to rent control generally, rather than engaging directly with the question.

The main themes and comments from respondents included:

- Rent control measures should be considered by examining the increase of homelessness and the numbers of people in temporary accommodation- this should be an indication that action is needed.
- Rent control measures could be considered when actual rent levels are exceeding market rents or when inflation has overtaken salary increases.
- A rent control measure could include thresholds to trigger interventions based on income brackets.

- A rent control measure could be considered based on the ratio of income to rent spent on rent by tenants.

Further themes, comments and suggestions included:

- Robust data, information and research into rent control measures should be obtained prior to any proposed rent control measure.
- Examples of the type of data that should be obtained prior to any proposed rent control measure included: availability of housing, location, existing rental data, socio-economic classifications provided by ONS, planned development, desirability of an area, and the energy performance of rental properties.
- If rent control measures were introduced, private landlords may choose to leave the sector, which could reduce the supply of PRS properties.
- Opposition to rent control measures, either due to case studies which has shown it has provided to be unsuccessful, due to concern of the unintended consequences of rent control, or due to disagreement with any form of government intervention in the sector.
- Wider housing reform is needed rather than just a focus on rent control measures, such as a focus on increasing housing supply, affordable/social housing, improving housing quality, and increasing construction of new housing.
- Any proposed rent control measure should be implemented alongside action to increase housing supply- rent control measures alone may not be sufficient.
- There should be consideration into housing supply in certain areas.
- Concern that any rent control measure would not address the quality of housing available in the PRS or could potentially even worsen the quality of PRS property.
- Private landlord costs should be considered, including the viability of a private landlord to continue their investment if rent control measures were introduced.

Further comments which were not directly relevant to the question, but still were noted included:

- There should be action to ban no fault evictions.
- A rent cap could be a suitable measure which would be agreeable to both private landlords and tenants.
- There should be increased protections for tenants to challenge unreasonable rent increases.
- Tenants can already challenge unreasonable rent levels.
- Private landlords could be given incentives to remain in the sector/to improve their properties (for example, one respondent suggested to provide a form of tax relief to landlords buying new stock).

Respondent Quotes:

'Whilst keeping rents to a minimum would be a benefit to tenants and improve access to accommodation, there are question marks over whether rent controls are the most effective tool to achieve this. It is likely that broader Policy interventions, including building more homes and reviewing the way benefits are paid to cover housing costs would do more to address the challenges faced.'

A failure to look at the issue more holistically could result in private landlords effectively cross subsidising the costs of affordable housing, something they are unlikely to have the appetite to do, especially at a time when they find their own costs going up'. – Vale of Glamorgan Council

'We recognise rent control has been used recently in Scotland as a response to the cost-of-living crisis as a short-term tool to support vulnerable tenants. Yet, given the legislative timetable indicated by the Welsh Government and the limited timeline to introduce change in this Senedd term, legislation around Rent Control may not become law for another 4 years. We are concerned this risks the worst of both worlds; delayed limited change that does little to address the wider issues within the Welsh housing sector, and a long build up that allows unscrupulous landlords a number of years to increase rent ahead of legislative change. Introducing Rent Controls without wider reform risks adding heat to an already over heating market'. - Tai Pawb

'The prospect of not being able to adjust rental prices in response to economic conditions, maintenance costs, or other unforeseen circumstances makes property investment less attractive. This could lead to a reduction in the number of quality rental properties available in Wales.' – Private Landlord

'There should be a ruling that rents cannot be raised by 7% per annum on all properties' – Other/Undeclared

Q19. Who should be responsible for determining if a rent control measure is to be introduced?

192 respondents answered this question.

The type of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	10
Local authorities	7
Political parties	1
Registered Social Landlords	0
Letting Agents/Management Companies	6
Private landlords	35
Industry experts	2
Trade Unions	2
Other/Undeclared	129
Total	192

While suggestions were provided for who should be responsible for determining if a rent control measure is to be introduced, often respondents provided comments on their views to rent control, rather than directly responding to the question.

The main themes from respondents included:

- The Welsh Government/Welsh Ministers

- The Welsh Government should develop the national approach but work with local authorities on the implementation of rent control within local authority boundaries.
- The Welsh Government should work with all relevant bodies in the PRS, including tenants, landlords, agents, industry, local authorities, and registered social landlords.
- A national body.
- Rent Smart Wales
- Local authorities should decide for their own authority.
- Rent Officers

Further observations and comments included:

- Disagreement with all forms of rent control measures or government intervention in the housing market.
- There should be a consultation process ahead of any proposed rent control measure.
- The Welsh Government should further consider what they intend to implement regarding rent control measures and consider if this is the best intervention in the PRS.
- Instead of rent control measures, the Welsh Government could introduce the ability to challenge above market rent rises (potentially via a Tribunal).

Respondent Quotes:

'A single national metric for the whole of Wales would be necessary, and the actual decision would require some sort of dialogue and shared responsibility between the Welsh Government and the relevant local authorities'. – Dr Koldo Casla, Senior Lecturer, Human Rights Centre Clinic, Essex Law School & Human Rights Centre, University of Essex

'Local Authorities as they have a good understanding of the circumstances and challenges operating within their areas'. – Flintshire County Council

'As a Welsh Network we feel it is important that the decisions on rent control are made by elected officials representing the interests of the Welsh populous, where this is not possible then a national body such as Rent Smart Wales and in some instances it may require the action of the Welsh Government.' - Wales Safer Communities Network

'The overall guidance should come from Welsh Government; however, any measures must be considered at a local level and have the flexibility to change with the changing demand of the rental market. Although the guidance should come from WG the method in which to get there should incorporate a consultation period involving PRS landlords and their contract owners. Any policy that has socio-economic impact must have the interests of the people who will be impacted most by its implementation at its fundamental core'. – All Wales Housing Expert Panel

'Government is always responsible for these things but should not use it when so many alternative solutions to problems already exist'. - Other/undeclared

Q20. How could compliance with a rent control measure be monitored and enforced?

175 respondents answered this question.

The type of respondents to this question are outlined below::

Respondent Type	Number of Responses
Representative bodies	11
Local authorities	8
Political parties	0
Registered Social Landlords	0
Letting Agents/Management Companies	6
Private landlords	25
Industry experts	0
Trade Unions	2
Other/Undeclared	123
Total	175

The main themes and considerations included:

- Through Rent Smart Wales (RSW), potentially via:
 - Making compliance a condition of a landlord license and giving RSW the ability to revoke licenses in instances of non-compliance.
 - Data collection/reporting, e.g., using RSW as a centralised system to collect rent information and rent increases.
- Through local authorities.
- A national body/department.
- Penalties for non-compliance/spot inspections.

Further comments and observations included:

- Tenants would need to be made aware of any rent control measure to ensure they are informed to challenge non-compliance/ any measures would need to be publicised.
- Concern over the cost, resource and funding needed to ensure compliance with rent control measure.
- Statements regarding the potential unintended consequences of a rent control measure, such as the potential for landlords to leave the sector.
- Consideration into whether this would be the correct intervention and whether investment should be made into increasing social housing instead.
- Consideration into how to target 'rogue' landlords who do not comply.

Respondent Quotes:

'Compliance could be monitored via Rent Smart Wales or perhaps as part of the Tenancy Deposit Scheme where landlords are required to put a tenant's deposit in a

government approved scheme (the rent information could be required at the same time). WG could assign a rent control officer to each LA area, collecting the data locally and storing it at a national level so that the approach would be consistent throughout Wales.’- local authority

‘If we make it a part of licencing conditions that landlord report on the rents being charged every twelve months and at the start and end of a tenancy it would be clear when a landlord is not adhering to rent control measures. The rents officer would then need to report these breaches to a rent regulator who would be responsible for enforcing rent control measures. It would also need to be considered whether noncompliance with rent control would be a breach of licence requirements and whether a suspension of the licence or removal appropriate depending on the level of non-compliance’. – CIH Cymru

‘As with the question 15 we believe that Rent Smart Wales’ licence requirements provide a vehicle for enforcement. Compliance with rent control measures should be a licencing requirement for all landlords. If rent control measures were introduced alongside a requirement for landlords to share their rent data, then any landlord or agent that submitted data that indicated that their rents were above a relevant rent cap would be notified of this and provided with an opportunity to rectify their rent. Failure to do so would see them have their Rent Smart Wales licence revoked’. – The Bevan Foundation

‘This is an area where more research is needed into the models that have been cited in the consultation paper. It will have to be a relatively robust system, which would also need to be publicised nationally, to raise awareness of its existence as far as it possible. It might also be useful to consider introducing a system that follows the registration introduced for Rent Smart Wales, where training was given’- local authority

Q21. Do you have any views on the models for rent control measures?

198 respondents answered this question.

The type of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	11
Local authorities	8
Political parties	0
Registered Social Landlords	0
Letting Agents/Management Companies	8
Private landlords	41
Industry experts	0
Trade Unions	2
Other/Undeclared	128
Total	198

Respondents provided both their views to rent control generally and views on each generation of rent control.

The main themes and considerations from respondents on views for rent control generally included:

- Support for a model which ensures rent stabilisation with an annual allowed increase/a limit on how much rents can be increased annually.
- Rent control could be based on the income level of tenants and affordability for tenants.
- Rent control could reduce investment in the PRS.
- Rent control could cause higher rents, if rent increases were limited to a set percentage, landlords may arbitrarily increase rents to that level even if they wouldn't have increased them to that level before.
- Rent control could reduce the quality of PRS stock.
- Rent control may encourage landlords to exit the sector and could reduce the supply of PRS stock.
- Data would be needed on landlord views on rent control.
- Calls for an evaluation of the impact of the Renting Homes Act prior to any further policy interventions in the sector.
- Reference to the evidence provided by NRLA of rent control measures which were considered unsuccessful.
- The impact of rent control on landlord costs.
- How further consideration would be needed on potential unintended consequences of rent control.
- Rent control may be needed as only one measure in the PRS, alongside long-term reform.
- Reference to international examples of rent control which has shown measures have been unsuccessful.
- Calls to increase housing stock (including social housing).
- Disagreement with the concept of rent control/disagreement that it would be an effective intervention.

The main themes and considerations from respondents who provided views on specific models of rent control included:

First Generation

- First generation rent control may be the most easily understood model.
- First generation rent control may make rents higher, such as the example of rent control measures in Scotland.
- A yield-based model may discourage landlords from making improvements to their properties.
- In a yield-based model, it may not be equitable to base rents on property value when house prices increase over time.
- An affordable supply model could be ineffective if there is a low amount of new build construction.
- The quasi-social rent model could be ineffective as the LHA rate is insufficient.

Second Generation: Energy/Quality Based Model

- An energy/quality-based model could potentially create a two-tiered rental system by making certain rental properties inaccessible for people on lower incomes.
- An energy/quality-based model would still allow rent rises and could still make rents unaffordable.
- A second-generation model may receive the most support.

Third Generation

- This generation could be the best model because it may be the least impactful on supply.

Respondent Quotes:

‘NUS Wales believes that, ultimately, any model of rent controls is a sticking plaster solution designed to disrupt the current cycle of uncontrollably escalating rents, and to support individuals, such as students, who are being priced out of accommodation. What is needed in order to fix a long-term issue is a radical, large scale reform, and a culture change within Wales’ private rental sector, to ensure sufficient housing is available at an affordable rate, and that the standards of housing available are adequate (and, at the very least, fit for human habitation).’ – NUS Wales

‘It does not seem equitable to base rent caps on property prices as rent caps are designed to improve the affordability of rent which should be linked to income so it would be more equitable to base rent caps on a determined local income ensuring that more households are able to afford the rent levels set. The JRF living rent model is linked to income and is an equitable way of calculating the level rents should be set to within an area.’ – CIH Cymru

‘The most effective way to improve rent affordability in Wales in the medium to long term is to increase the availability of social housing. As such we believe that a version of first or second generation rent controls that regulate increases in rents in the private rental sector, whilst investment is made in increasing the availability of social housing would be the most effective way of using rent controls.’ – The Bevan Foundation

Q22. Do you have any further evidence or observations that you wish to provide?

92 respondents answered this question.

The type of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	15
Local authorities	6
Political parties	0
Registered Social Landlords	0
Letting Agents/Management Companies	7

Private landlords	35
Industry experts	1
Trade Unions	1
Other/Undeclared	27
Total	92

The main themes, considerations and suggestions from respondents included:

- Statements from landlords who have outlined that they intend to leave the PRS if there is further intervention in the sector, particularly if rent control measures were introduced.
- Statements from landlords who have outlined that they already keep rents in line with LHA rates/ that the market already sets fair rents.
- International examples of unsuccessful rent control measures.
- Concern that any cost-based interventions in the PRS could reduce the quality of PRS stock/ discourage landlords from improving the quality of their PRS stock.
- Website links to research on rent control, including the UK Collaborative Centre for Housing Evidence (CaCHE) briefing paper on 'Rent Control: Context, Issues and Options', CIH research into rent control in Northern Ireland, the NRLA literature review into rent control and research into the case for rent control in Wales, and other international examples).
- Calls to increase housing supply to achieve housing adequacy and affordability.
- Calls to implement the right to adequate housing.
- Calls to improve affordability in areas with a high number of visitor accommodation and second home ownership.

Respondent Quotes:

'We believe that legislation to incorporate the right to adequate housing into Welsh law is the starting point that provides the paradigm shift in the way we view housing and the investment and prominence it is given in the wider public policy debate in Wales to deliver the long-lasting change that we, as housing professionals, all aspire to delivering.' – CIH Cymru

'As also outlined in our response there is a need for much greater consideration as to how any measures of fair rent and adequate housing are connected with broader housing policy reform, including action to increase the supply of social housing and to better regulate the short-term holiday let sector.' – The Bevan Foundation

Welsh Language

The below questions on the Welsh language were included in the online consultation. Therefore, the total respondents are based on the 269 responses received via the online consultation.

Q23. We would like to know your views on the effects 'Securing a path towards adequate housing including fair rents and affordability' would have on the

Welsh language, specifically on opportunities for people to use Welsh and on treating the Welsh language no less favourably than English. What effects do you think there would be? How could positive effects be increased, or negative effects be mitigated?

59 respondents answered this question.

The type of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	0
Local authorities	2
Political parties	0
Registered Social Landlords	0
Letting Agents/Management Companies	3
Private landlords	31
Industry experts	0
Trade Unions	0
Other/Undeclared	23
Total	59

Q24. Please also explain how you believe the proposed policy could be formulated or changed so as to have positive effects or increased positive effects on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language, and no adverse effects on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.

44 respondents answered this question.

The type of respondents to this question are outlined below:

Respondent Type	Number of Responses
Representative bodies	0
Local authorities	1
Political parties	0
Registered Social Landlords	0
Letting Agents/Management Companies	2
Private landlords	25
Industry experts	0
Trade Unions	0
Other/Undeclared	18
Total	44

In response to both question 23 and 24, most respondents were unaware of any impact that the Green Paper would have on the Welsh language. In the main, respondents saw both issues as disparate. Although not considered themes, individual comments regarding the impact on the Welsh language included:

- The impact of high numbers of second homes on Welsh-speaking communities.
- The impact of increasing rents on the ability of Welsh-speaking people to access the PRS.
- Statements generally against interference in the rental market, as both Welsh landlords may exit the sector and impact on affordability for Welsh speaking renters.

However, the Welsh Language Commissioner, Aberystwyth Council, and Cymdeithas yr Iaith provided views throughout their response on the connection of the Green Paper to the Welsh language. Connections to the Welsh language included:

- Cultural adequacy, and related issues of Welsh speaking people being unable to afford to live in local Welsh speaking communities, and the negative impact on the Welsh language and culture.
- The issues around second home ownership and the impact of affordability for local people in their communities.

The Welsh Language Commissioner outlined that the Green Paper did not acknowledge the link to the Welsh Government's Cymraeg 2050 strategy, nor the link between affordability issues for local people and the Welsh language. The Welsh Language Commissioner also outlined that further consideration should be given to the issues of second home ownership and the impact of short-term lets.

Respondent Quotes:

'Social use of the Welsh language is a cornerstone of the Welsh Government's Cymraeg 2050 strategy, and protecting the sustainability of communities where the language is spoken naturally from day to day is going to be essential in ensuring the viability of Welsh as a community language. A clear challenge for these communities with a high density of Welsh speakers is the lack of adequate housing and affordable rental opportunities.' - Welsh Language Commissioner

'I don't believe that it would have any particular effect on the Welsh language other than potentially preserving existing communities of Welsh speakers at risk of being split due to high prices.' – Other/Undeclared

Next Steps

The Welsh Government is grateful to all who responded to the Green Paper consultation. There was a wide range of evidence submitted, and while not every view can be reflected fully in this summary, each response has been considered. Following the comments and feedback we have received to the Green Paper, we are developing proposals for the White Paper consultation on housing adequacy, fair rents, and affordability.

Glossary

PRS- Private Rented Sector

RSW- Rent Smart Wales

LHA- Local Housing Allowance

ONS- Office for National Statistics

RTAH/RAH- Right to Adequate Housing

ICESCR- International Covenant on Economic, Social and Cultural Rights

LTT- Land Transaction Tax

WHQS- Welsh Housing Quality Standard

HHSRS- Housing Health and Safety Rating System

EPC- Energy Performance Certificate

NRLA- The National Residential Landlord Association

BRMA- Broad Rental Market Area

HMRC- HM Revenue and Customs

DWP- Department for Work and Pensions

CaCHE- UK Collaborative Centre for Housing Excellence

CIH- Chartered Institute of Housing

Annex 1: Green Paper Consultation Events

Housing Adequacy and Fair Rents Workshops

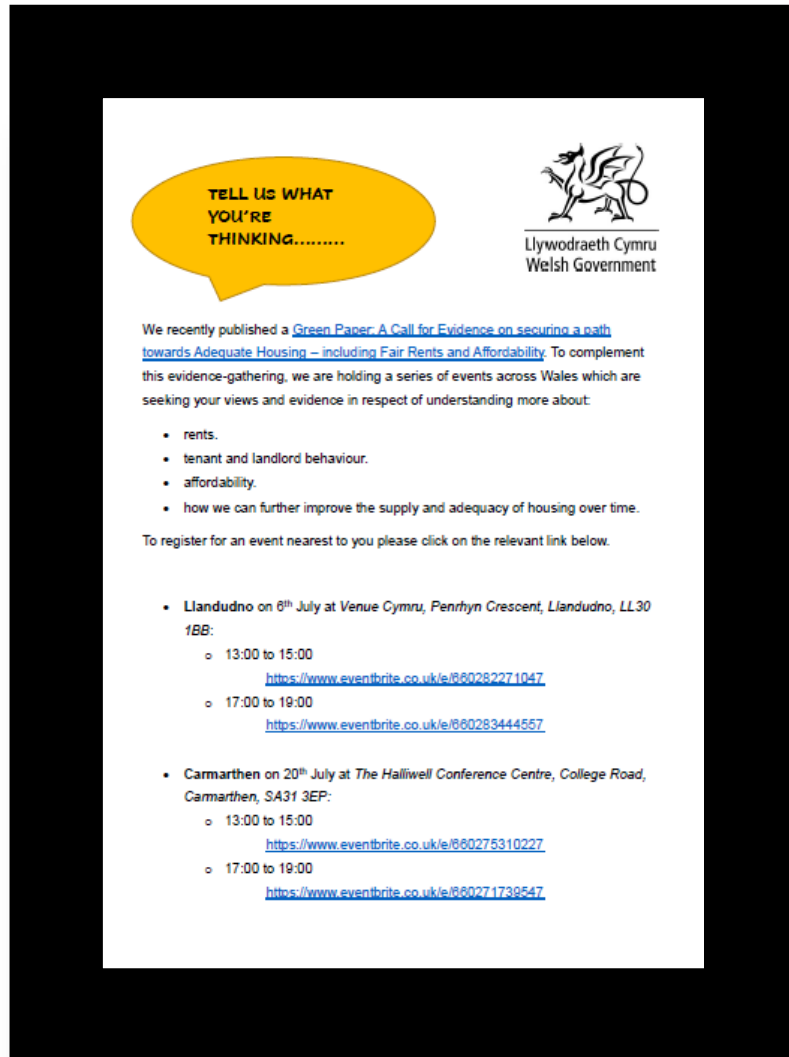
Introduction

As part of the evidence gathering to support the Green Paper Call for Evidence a series of free workshops were held in July 2023. 3 locations were chosen across Wales to try and ensure representation from all parts of the Country. These locations were:

- Cardiff
- Carmarthen
- Llandudno

In order to ensure that the greatest number of participants could attend 2 workshops were held at each venue, one in the afternoon between 1pm and 3pm, and a second in the evening between 5pm and 7pm.

Participants were required to book a workshop slot via Eventbrite, and adverts to publicise the events were distributed via stakeholders on the advisory group in order to try and ensure representation from both landlords, tenants, and interested stakeholders.



TELL US WHAT YOU'RE THINKING.....

**Llywodraeth Cymru
Welsh Government**

We recently published a [Green Paper: A Call for Evidence on securing a path towards Adequate Housing – including Fair Rents and Affordability](#). To complement this evidence-gathering, we are holding a series of events across Wales which are seeking your views and evidence in respect of understanding more about:

- rents.
- tenant and landlord behaviour.
- affordability.
- how we can further improve the supply and adequacy of housing over time.

To register for an event nearest to you please click on the relevant link below.

- **Llandudno** on 8th July at *Venue Cymru, Penrhyn Crescent, Llandudno, LL30 1BB*:
 - o 13:00 to 15:00
<https://www.eventbrite.co.uk/e/860282271047>
 - o 17:00 to 19:00
<https://www.eventbrite.co.uk/e/860283444557>
- **Carmarthen** on 20th July at *The Halliwell Conference Centre, College Road, Carmarthen, SA31 3EP*:
 - o 13:00 to 15:00
<https://www.eventbrite.co.uk/e/860275310227>
 - o 17:00 to 19:00
<https://www.eventbrite.co.uk/e/860271739547>

In total 235 people registered and 168 actually attended across the 6 workshops. The greatest attendance was in Cardiff with 78 people, and the lowest attendance was in Carmarthen with 37 people. Despite emailing a number of tenant organisations to make them aware of the workshops very few tenants attended, though NUS Cymru did attend to represent student renters in Wales.

To ensure that tenants views were captured we commissioned Beaufort Research to survey tenants through the Wales Omnibus Survey. The results of this survey are being published separately.

The workshops used Slido interactive data capture to obtain the views of participants in relation to a number of questions on housing adequacy, rents, and affordability. The Slido data is set out in Annex 2.

In addition participants also raised a number of related points in the discussion sessions and to the facilitators available on each table, and these have been

captured and set out below. The views and statements below are therefore those of participants and not Welsh Government. These views also illustrate some of the levels of awareness and perception within the Private Rental Sector as of Summer 2023.

Llandudno – 6/7/23 – 13:00-15:00

In attendance: 18

- *Renters in North Wales are often on lower income or are retired – different type of tenant means different PRS.*
- *The further West you go in Wales the more people (landlords) owning properties outright. Wrexham has a lot of landlords with buy-to-let mortgages that are rising quickly.*
- *Unfurnished properties are becoming more popular. Letting agent with more than 300 properties said it used to be 50% unfurnished, but not 70%+.*
- *Length of tenancy is increasing. In 2001 average length of tenancy in Wrexham was 6 months; now it is 2+ years.*
- *Lack of new rental developments.*
- *The idea of a tenant registry was raised to make a list of rogue tenants. Could WG make a short questionnaire for end of tenancy to create a reference of the tenant. Central registry so that landlords could check for this reference when doing background checks for a new tenancy. Note: Why did the tenancy come to an end? Moving/arrears/damage/breach of contract.*
- *There needs to be a proportional response to anything as there is already a lot of admin required by landlords.*
- *There are no incentives for landlords to put properties onto the market.*
- *Local authorities should work more with letting agents. Use them as the intermediary rather than going direct to landlords.*

Llandudno – 6/7/23 – 17:00-19:00

In attendance: 35

- *Corporation tax rise has had the biggest impact of on landlord costs. Alongside general inflation, landlords need to increase rents to maintain income.*
- *RSW lack the teeth to deal with bad landlords.*
- *6% yield is expected for a property. With interest in savings accounts approaching 6%, landlords could sell and put money into a high interest account to get the same or better return on investment.*
- *Landlords will increase rent to reach any rent cap just in case.*
- *Meeting like this could put fear into landlords to increase rent in case rent control comes in.*
- *Students are seeing a big increase in rent.*
- *Regulations impact people on the bottom.*
- *Rent increases are not reflected in local landlords. Will keep rents the same. A lot of the data is skewed.*
- *Manage 400 properties. Used to give data to Rent Officers for BHM but don't any longer.*
- *Rent control would be final straw. Landlords would sell and kill the market.*
- *Spun by landlords. Fit for Human Habitation. Legislation is hindering. £10k costs means they just evict tenants. LAs are not buying/building.*
- *In case of HMOs – in Bangor divided into wards – assessed by LA with carrying capacity. LAs assume HMOs are student accommodation. That is not the case. Now it working people living together. If they cap the number of HMOs it would impact on working tenants, not students. Need to keep up with changing make-up of tenants.*
- *As a tenant felt completely powerless. Rents are going up. Power dynamic. No other feasible solution on the table to empower people. Some legislative changes have given some power, but there has to be a system. (NUS).*
- *A snapshot of the rental market in Wales – Zoopla and Rightmove – outnumbers everything else. Big knock-on effects.”*

Carmarthen – 20/7/23 – 13:00 to 15:00

In attendance: 30

- *Why wouldn't landlords increase their rents to maximum now just in case there is a freeze on rents introduced. Current mortgage rates 4.86% for 10-year rate when it was 2.6% before.*
- *Didn't build social housing. Brought in RSW. Brought in Renting Homes Act. EPCs.*
- *Don't need to invest in property as we can invest in other things.*
- *Reasons for rent rises:*
 - *Insurance costs – Gone up 30%.*
 - *In case rent control comes in.*
 - *Stopped charging rent in the pandemic and brought it back in stages.*
- *Represent rural landlords. Must get to EPC 'E' and the potential to get EPC 'C'. Another cost on top of everything else. Members are saying they cannot afford the improvements. Many landlords charge family well below market rent to keep a local family in situ. Policies between tourism and housing are not talking or marrying up.*
- *Landlords think ahead as they are making a long-term investment.*
- *Told EPCs will be coming in. Getting rid of gas boilers and having other forms of heating.*
- *Lack of certainty over potential EPCs is causing landlords to sell.*
- *Are you aware of what is happening in the market? West-Wales – used to have 80 properties on list for people to rent. Now they have 3. Whole market is out of balance. WG is not aware of the market. Do care about tenants. All the changes about 6 months' notice. Don't sense how dire the situation is now.*
- *Where do RSW get their data from? Data does not tally with Savill's data.*
- *Could RSW data be skewed? No incentive to remove from the register so the actual number is significantly different.*
- *Surely Housing Advice Centres should hold that data?*
- *Not sure landlords are buying at the moment.*
- *In the RCT it is going to people that previously had to commute, so they now move out of the city. Local estate agents are leaving the rental market.*
- *How long tenancies are. Before RSW – most of tenants stayed in properties for 6-9 months. Very unusual for people to be in situ for 3-4+ years. Big change – musical chairs because if they move, they may not get a new accommodation. Need to stop the landlords leaving the market.*
- *Up to an hour to find a new tenant. A matter of days. For one property they get 3 figure numbers of people turning up.*
- *Reasons for tenants to leave:*
 - *Tenant moved to a different area.*
 - *Tenant passed away.*
 - *Fixed year contract and renew at 3 years.*
- *Work with tenants – if they want to leave even before contract happy to let them move on.*

- *Shadow a landlord/agent and see what's happening.*
- *Reasons for being a landlord:*
 - *They were not able to sell property so rented it out.*
- *Comfort:*
 - *Draft-proof*
 - *Dry*
 - *Central Heated*
 - *Well repaired*
 - *Well decorated*
 - *Something that you would live in yourself or put your family in*
 - *Well looked after*
 - *If it looks good the tenant will look after it*
- *Rank importance in terms of renting a property*
 - *Location is a choice for people*
 - *Rural properties is specific to individual – it is more a tenant concern*
 - *HSRS*
 - *Poor quality landlord with poor quality landlord won't have changed much – need proper enforcement*
 - *Everyone here probably has property that is suitable – talking to the converted. Sort of understand why RSW introduced. Increasing interest rates has made it a harder pinch. Wouldn't be quite as tense.*
- *Main outcome from today is to take back what the situation is:*
 - *Will EPCs come into force?*
 - *Will a cap come into force?*
 - *What else might RSW think about in the future?*
- *Why talk about something now that could make landlords say, "this is too much". The fear could cause them to leave the market. Won't be looked at. Surely wrong time to talk about it? Is it just a PfG commitment?*
- *In Scotland they dumped it overnight.*
- *4-5 years ago WG said they wanted to work with landlords and they failed. Does not instil confidence because of past action.*
- *Before RSW there was not direct access to landlords. Direct feedback to landlords. Understand what the concerns are.*
- *Demand outstripping supply – this is looking at symptoms rather than the cause. A lot of problems are linked to the planning system. If they give planning in the rural areas, things would improve. Second Homes is an issue. Builders are desperately short of plots to build. Landlords are willing to accept less per plot for rural areas.*
- *WG pays huge amounts of money to planning associations. Adequacy of numbers needing to be built. Shouldn't they be dealing with the lower paid people and dealing with supply.*
- *Land transaction tax is high.*
- *Compare like for like for PRS and RSL. Subsidies on social rents.*

- *Are WG looking at any ways to attract landlords? Get tax back on interest payments? Positive encouragement.*
- *Nothing on Cardiff Council website for landlords and new landlords.*
- *Caerphilly Council – Bringing Homes Back into Use scheme – would take over 12 months to give sort out the grant.*
- *Doing up empty property – once you start works could the rates stop? It takes months to do the repairs.*
- *Most people buying a property to let is an investment. Stamp duty, solicitor's charges, extra costs, repairs, and improvement. Security of tenancy. Main desire for West Wales is get a tenant in and keep them in. System should not jeopardise the market. If it is secure for tenant. Communicated correctly.*
- *Market has not adjusted to the 6-months' notice has affected it*
- *A lot of houses empty. Who knows that? Does that information get given to landlords? Shame to see them empty – there are landlords that would be interested in taking up those properties.*
- *Professional investors have long-term planning goals. Trying to get hold of decent contractors is difficult. Heat pumps are not the answer.*
- *RSW data: 200k properties may not what actually exist in Wales. Do a tick box where every landlord gets a notification from them: Are you still an active landlord? Immediately get live information. Send it out every 6 months? Literally a single tick box.*
- *Tenants are not interested. Have to print out massive contracts and the tenant does not read it.*
- *RSW don't prosecute the bad landlords.*
- *Happy for increased RSW costs if they actually enforce the legislation?*
 - *Should not pay to enforce the law.*
- *Just a box ticking exercise for civil servants – need to have landlords more involved in the process.*
- *How are you tackling those in breach and why should RSW fees paid by the good landlords be used to chase the bad ones?*
- *Feedback on reporting on bad landlords would prompt good landlords to report on the bad.*
- *Tenants don't know they can check landlords on RSW. Hardly anybody knows how to do that. A lot of tenants from abroad so they don't understand the process.*
- *Query over 30% question: competition for properties / landlords overwhelmed with applications.*
- *Reason for rent increases – Other: rents stopped during the pandemic and were brought back in stages.*
- *Potential data in RSW could be skewed by landlord registration is live when they have sold and not de-registered on RSW.*
- *EPC ratings are going to increase costs to landlords to get properties up to standard*
- *Not built social housing – didn't listen to responses in the last consultation. WG doesn't listen.*

- *Costs kept down during the pandemic (and even stopped rent) so the 3 years doesn't represent a fair comparison.*

Carmarthen – 20/7/23 – 13:00 to 15:00

In attendance: 7

- *RSW contract is too long. 42 pages.*
- *If you have a landlord with 5 properties and they sell 2. How does that appear on the RSW register?*
- *If I keep the property to a good standard, I ought to be able to charge what I deem appropriate for my property.*
- *Is the 20% low quality figure for all tenures? Does it break it down for PRS/RSL?*
- *Just to clarify – I would disagree. England have said they would not consider it [Rent Control] because it is not working. Housing crisis in Germany got worse as things were brought in.*
- *Would the WG be looking to make HMOs different to other housing under rent control?*
- *Universities – Swansea university rents are enormous. If the university can charge ridiculous rents, then how would that impact?*
- *Most student landlords include rent. Differential is £175 per month per students against what a bill to rent company would charge. WG policy and policy of local authority is to bring in as many build-to-rent into the area and make as much student accommodation as possible.*
- *If this policy comes in, then who would police it? If RSW can't police their licensing at the moment, what chance is there with further legislation/rent control?*
- *What happens when the mortgages keep increasing and WG are stuck on a rental scheme?*
- *22 properties – some are mortgage. The ones without mortgage are funding the ones with a mortgage. RSW are stopping me putting the rent up. Some of these are social tenants and it requires taking them to court. If they can't pay the rent, they can't pay their court fees.*
- *Is it WG or RSW that introduced legislation that the tenant can withhold the rent if there is a defect in the property? As a surveyor, getting so many calls where the tenant is complaining about damp, but this is actually just condensation.*
- *Did a survey yesterday – tenant complained about damp – 3 bed house, 15 years old, 3 dogs, 2 cats, 1 rabbit, 1 parrot, etc – actually condensation. Why should she be allowed to withhold rent – done by the health visitor. Nobody there to police it. The costs of going to court are huge. Judges were at a RSW meeting to understand the documentation required. Tried to get on a course again, but unable to resit it.*
- *You can't get hold of RSW.*
- *Commercial viability of running a business as a landlord. If your income is stopped by a tenant withholding rent, then it could cause you to default on your mortgage.*
- *30 years involved in letting properties. Don't know of any situation of insurers paying out. Bond boards are a waste of time.*

- *If there is a level playing for everybody. We should be controlling the quality of housing in general -> tackle the bad landlords correctly. If they were made examples of then surely the market would level itself out.*
- *Other reasons for rent increase:*
 - *Stress test on mortgage*
 - *Training costs required by RSW under the Renting Homes Act*
- *The more you legislate against us, the worse it will get.*
- *How long owned property:*
 - *Mostly 15+ years, but some 1-2 years.*
- *Within a day – much quicker than a month.*
- *20 years ago, when buy-to-let wasn't a burden they were letting properties out under the LHA rate.*
- *If the property became empty today, they could get tenants in tomorrow.*
- *Tenant moved to a bigger property.*
- *Law doesn't understand process re: anti-social behaviour.*
- *A lot of landlords inherit or gain property accidentally.*
- *Citizen's Advice – protect tenant – cannot take them to court because they're under protection.*
- *Receipt of regular rent is most important for landlords.*
- *How would you determine what market rent is?*
- *Problem with knowledge of market rent is thinking that every property in a street is the same quality.*
- *NRLA evidence about median rents from 2011/12 to 2021 show they went up 1.06%. Recently they have gone up, but isn't it a special situation because mortgages are going up. Landlords only put up rents when a tenancy ends. You would rather have a tenant, so you keep it level. What is the WG justification because there is no evidence.*
- *English government say they want to get rid of small landlords because they are unprofessional – good landlord sorts things out immediately. Complaints put into a jobs list and it will take weeks with a big company.*
- *How are tenants better off in Wales now than they were 10 years ago.*
- *Rather than a 7 page contract it is 42 pages. No tenant will read it. Still has errors in and needed to be corrected.*
- *You should call a meeting of landlords in Cardiff and invite Julie James. Nobody knows what they're doing any more. Torn up all the statutes and case laws - there are so many loopholes that it needs to go to courts. Will go to judges, then appeal courts, then high courts. All of this before the law is functioning.*
- *Had rolling tenancies and never gave a rent increase to tenants. Now I've told my tenants that there will be a rent increase every year. If anything goes wrong, I will get rid of the tenants. Used to require 1 month evidence – now with 6 month I need to cover myself.*
- *Such a backlog in the courts that it would take months and months.*
- *Madness – everyone understood where they were before Renting Homes. Now nobody understands what such and such clause means. Have I used the*

right form? Made a very complicated system. Now talking about rent controls. Not even mastered the new legislation yet.

- *English government have said they are driving landlords out. WG are doing the same.*
- *Paperwork from Renting Homes is getting rid of the small landlords.*
- *Last summer – investment property in Farnham. Know 4 couples that were going to invest in Wales. WG government doesn't want English landlords in their country.*
- *RSW is different from WG, but...RSW hadn't considered student market when they unleashed documentation in December. Needed to rewrite aspects of the contract. A whole industry created on the back of that. Needed to serve by end of May, which falls outside of the student cycle. A whole raft of other paperwork/documentation had to go out.*
- *Then they added another 3 pages onto the Renting Homes contract.*
- *Supply and demand is the root problem.*
- *One other problem that would alleviate pressure on landlords – the section 24 tax.*
- *Rent Officers: Wide scope like land registry or individual property?. They will get data from local estate agents, but the agent does not go into every single home. Would they get paid for giving that information? A landlord might inflate their information. Would that be governed by areas? Doesn't always work as the borders have to combine with all other borders.*
- *Will they actually listen, or have they already made their decision?*
- *What about large landlords and build-to-rent? Are they being consulted separately?*
- *When I first started renting, I specialised in homeless people, soldiers with PTSD. Now, because of all the onerous pressures put on me, I am thinking about selling up because of you. Turned out 7 in the last year.*
- *If rents dropped would there be a control the other way?*
- *If these rents are capped, what about LAs where they pay the tenants' rent, will there be any help to up the housing benefit?*

Cardiff 25/7/23 – 13:00 to 15:00

In attendance: 36

Italics are viewed expressed by attendees:

- *Long-term but guaranteed income – 3.5% rate would be sufficient for that, but if uncertain then looking for 5+%. The % rate should also factor in maintenance costs, which are often overlooked now.*
- *Put control on supermarket profits as well. Singling out one private business (landlords) when high profits in other private business.*
- *Same answer if over past 10 years. Just the one rent rise.*
- *Are we picking up right information? What is your intent over the next 3 years re: rent rises.*
- *5-10% over 10 years.*
- *Some old tenancies curtailed to follow CPIH.*
- *Fixed term rents are an issue. Cannot fund increase so property must on to sell.*
- *Reasons for rent rise:*
 - *Tenancy ended so bringing up new tenancy to market rent.*
- *When interest rates are low you keep the rent the same for in situ tenants.*
- *Risk to too great – financial penalties are high, so you have to protect yourself just in case.*
- *Change to tax rate is having big impact – cannot offset burden.*
- *Social landlord – reduction in building of social tenancies because the worry of tenants damaging the property. Tenants should not be able to rent again.*
- *Reasons for tenancy ending:*
 - *Professional renters will live in a brand new property for a few years until the property gets tired and then they move on. Not too bad for landlord as they can bring the property back up to standard – new lick of paint etc.*
- *“To be honest, anything will rent at the moment.”*
- *£5000+ in rent arrears plus £300 to repair house.*
- *“Why are we asking about these 7 factors at all? Surely this is for tenants to consider and not for landlords”*
- *Signing 3 year contract rather than a 12 month contract. Might want a longer tenancy agreement to get guarantee to ensure a return that can cover costs.*
- *With RSW, they have a lot more security for tenancy already. Cannot get them out.*
- *Want to give 2 years notice because they know that the fixed-rate mortgage will expire, so they want to give their tenants sufficient warning.*
- *For the next 3 years it would be every opportunity to increase the rent. To add to that, the prospect of rent control would increase chances of rent increase – need to increase in case a cap comes in. If we don't take action now and this becomes a thing in 3/4 years, then we are unable to meet our costs. Not having any rent control would mean that would not happen.*

- *As landlords most tenants have been 10+ years. Not put rent up in that time. Part of the reason looking to put rent up now is because of the potential for rent increases in the future. Much more likely to put up every year just in case.*
- *Another suggestion in one point in green paper – if there was a new tenancy then there would be a restriction on the percentage rate increase. We would reset to market rate, but GP suggested restriction to percentage increase. This would force our hand so that every single year we would increase our rent.*
- *Whenever a landlord is put under financial stress – whether a single property, accidental, large portfolio – the more that the landlords are stressed (tax implications, restrictive legislation, etc.,) the more the landlord will exit the market.*
- *To add: what is the objective with regards to putting caps in place. Basic need of housing. All over last couple of years seen massive increase in living costs. Socially acceptable for tesco to increase margins by a big percent. But unacceptable for landlords to just cover their costs. Causing more damage and harm to restrict.*
- *Basing data on ONS figures, which are wrong. “We all know...”. Zoopla stats are telling you much bigger rise.*
- *Inflation over next couple of years. Huge costs to landlords – don’t want to give anything to us.*
- *Biggest impact is on buy-to-let – 1.8% to 6% increase.*
- *Section 24 tax changes.*
- *Forced to put the rent up.*
- *Looking through questions that have come up. Majority of landlords are good. Everything seemed to be stacked in the way of tenants. Removal of section 21. Tax implications. No support for landlords in sector so they are leaving. More that leave, the higher the rents go. WG need to help landlords keep their property businesses going.*
- *Agent: A lot of landlords have not increased for years. Last 2 years coming off fixed rates. Losing more landlords now than when the housing act came in last year.*
- *Might be in favour of rent control and is a landlord. Reasonable, fair, adequate rent control as long as there is protection against costs. If WG was serious about keeping private landlord, they should offer long term loans of 3.5% interest. Would require control of market, including loan rates. Yields tend to be difficult because the lower end of the market has the most stressed when the costs go up. Fixed costs to cover any property. Biggest risk to a landlord is variable interest costs. Someone has to fund it. Challenge WG to fund long-term investments at a certain rate. Even rates of 3.5% then the margins are preserved.*
- *When will RSW be checking the landlords?*
- *Saville’s: Residential investment market is 2-tier. Buy-to-let and big investment. Big investment is more resilient because they have more headwinds on inflation, voids, etc. Longer term view for big investments, but similar view in terms of rental confidence. When uncertainty comes in, then*

investors have a decision to make and might make investment elsewhere – English housing market or different type of investment.

- *Cost of maintaining a property. Changes massively – 2-bed flat compared to 5-bed house. Got to allow properties that have a substantial average cost of maintenance to be factored in any controls on rent*
- *Comprehensive academic analysis is needed of instances of rent control both historically and abroad*
- *All agreed there is a housing crisis. Reason is not down to PRS, but the poor public sector and RSLs. PRS is being looked at to solve the problems of the WG. Money spent on reducing speed limits could have spent on building housing.*
- *Earlier we had a look on slide and using RSW figures. 70% of landlords are single dwelling landlords. Most landlords don't go on RSW. A lot of single landlords that have sold properties, so all the figures are completely skewed. Elephant in the room is thousands of people sofa-surfing, guesthouses, or in temporary housing. Need to attract landlords back to the market and the harder you make it the fewer properties you have.*
- *Not being the role of the private sector to fix policy failures by public sector with regards to affordable housing. Return was c. 2.7% after tax – that is not enough. Public sector has opportunities to do more to secure provision of affordable housing. Through planning authority, can identify where to build – brown land etc., – should be able to increase building at reasonable cost.*
- *“We've reduced stock by 30% because of constant changes. We also build social housing – in excess of 120 units – but we have stopped because of the demands over and above normal housing but they do not want to put money in to fund it. Get only 2/3 of the value of the property build. They don't want to pay for what they want. Taking this property commercial as it will get a better return. Cost at the end for the risk involved is too high. There is a lot of land, but unfortunately WG decided to take TAN15. Calculations on flood risk is excessive and limiting building.*
- *Couple of people in room have mentioned investment. Key to investment is risk of return. With new living home contracts. New contracts will mean landlords cannot get their property back. A tenant keeps themselves just below the rent arrears and you have a tenant that doesn't want to get out. Takes 12+ months to get them out. Landlord could go under because of the length of time. Needs to be ways to protect landlords financially. Had a tenant causing over £2k damage, but only one month's rent deposit, so there is a huge discrepancy. Want something to be proposed to protect elements of costs. Yield does not show those scenarios. Need protection for PRS landlords.*
- *Where do we feed accurate information into the WG?*
- *Run Wales' largest house-buying company. Daily have landlords disposing properties. Urge people to deregister properties. Only going to find out in 5 years' time when landlords get an automatic email. If they sell a property with a tenant in situ they get a lower price. They evict tenant then sell on open market for higher price to home-owner occupiers. You can look at other*

pieces of information. I can tell you what landlords are telling us. Tired landlords in system.

- *Proactively poll people.*
- *Landlords that have sold are not part of this feedback. This would have more landlords here now if Renting Homes hadn't come in.*
- *Base point is there is a lot uncertainty and a lot of things potentially on the horizon. You know asking a tenant to leave is a difficult task, do you really want to commit to another tenant. Fear factor.*
- *Before today I did not know that there wasn't a date for EPC 'C'.*
- *Missed landlords because they didn't know about the event.*
- *Just to pick up on comments that were made: Are you going to include in analysis any activity with regard to local authority? Don't know many LAs that have invested well in housing in last 20 years. If there were investment, then perhaps we would not be having these issues now.*
- *Good getting people together. Issue is the bashing of the PRS. Need to draw a line in the sand rather than consistently battering you over the years. Make sure that you are working with landlords rather than only supporting tenants. Do you think consistent changes in housing ministers is good for a consistent approach?*
- *Empty homes in LAs. Is there something to tap into because of housing shortage?*
- *According to RSW website, EPC 'C'.*

Cardiff 25/7/23 – 17:00 to 19:00

In attendance: 42

- *Positive relationship with landlords 5 years ago. Now no longer the case.*
- *1 room gone from £475 to £625 for a room, with a 25+ person waiting list.*
- *Increase working from home.*
- *SA units in Merthyr*
- *Build-to-rent developers use information of new developments for where to build their properties. Could information be more readily available for landlords/property developers so that they know where to invest, where to buy, and/or where to build, so that investment can be made.*
- *Figure for registered properties is about 20% of total properties in Wales.*
- *Tenant buyers who in 3-4 years could afford a rent. Pay rent and a facilitation fee and they agree to put away 10% deposit over next 5/10 years. Half the landlord collects. Rent to buy. Puts maintenance onto the tenant, rather than landlord as that is in their own interest. Taking abandoned homes and putting some into landlord portfolio and some into rent to buy schemes. 25k to 50k empty/abandoned home. If you could incentivise landlords to put money to improve homes, then that would help supply issue.*
- *Council should use power to buy empty homes. Some have been bought by developers, but nothing is happening to them.*
- *Good landlords don't increase rent. One tenant hasn't had rent increase in 12 years.*
- *Single let landlords might have most increases in last few years.*
- *Could we break down the type of tenancy on the number of rent increases in past 3 years.*
- *7 years, 1 increase, 30%.*
- *Issue of inadequate housing. PRS is on average better.*
- *Former empty properties that didn't have tenants.*
- *Other reasons for rent increases:*
 - *Damage by tenants – protect against potential damage for properties.*
 - *Increased costs of tradesmen and maintenance.*
 - *Mortgage interest rates/tax.*
- *HMOs are about 2 years maximum.*
- *Single letting family is about 4 years on average before they get itchy feet.*
- *Emotional reaction because a flat rate for years is suddenly increased.*
- *If you improved the property, then they might be happy for an increase in rent.*
- *New investors from Bristol and Bath are ruthless in their rent increases. Unfair to put rent up for existing tenants.*
- *24 hours to find a new tenant. Market is turning over so quickly.*
- *Could take a tenant weeks months to find a place.*
- *Average of 6 to 9 months for a tenant to find a place.*
- *Why did tenancy end:*
 - *If you asked 12 months ago, landlord sold property would be bottom of the list.*

- Undeclared tenants.
- *Social Housing Builders are not building in Wales because of planning regulations.*
- *For 7 factors – if it is important (accessibility/cultural adequacy) then it would be very high, but if not then very low.*
- *Why topic up for discussion? Failure in Scotland and other countries:*
 - *Why did you say other countries have introduced rent controls with varying degrees of successes? No countries have had any success. They don't have PRS like we do.*
 - *Portfolio landlord. Got properties in Ireland where there is rent control. Happy to share experience. Overall comment is that when it was brought in RPZs had a negative effect on housing stock. Many landlords sold up or diversified into service accommodation., or other areas. In my case rent control in RPZs is 2% per year. For many landlords, they just cannot afford that. Many colleagues, including myself, are seriously thinking about pulling out. Same thing would happen in Wales. Same things are happening in Scotland.*
- *How solve housing catastrophe if unwilling to work with landlords*
 - *Point of Information: Energy act in UK government. This EPC would not need act of parliament, could be done by ministerial decree. Not out of the woods yet.*
- *Fair to tenants or fair to landlords and tenants?*
 - *The more you control things as a government the less ordinary people (small landlords) will be happy. If it gets difficult then landlords will sell. This will impact on tenants and most of these are good tenants.*
- *You used the world level playing field and equitable. Questionable words. Do you not feel rent increases at the moment are a symptom of the problem. By doing all this you are only treating the symptom, but not the problem. Surely you need to address the root cause. Free market – private sector. Only reason supplying 1 in 5 is government's have been inadequate in their supply of property. We filled the gap of social housing. There needs to be more social housing. Now PRS is being punished for the failures of government building.*
- *“Some of these issues discussed here should have discussed 8/10 years ago when LAs were reaching out the landlords to help tenants who fell by the wayside. I've had many properties with formerly homelessness people. This has nearly made me homelessness myself. Anti-social behaviour (includes not paying rent). They are called clients by LAs, but that is inappropriate term. Many landlords have problems with anti-social behaviour. Maybe they don't believe in the private sector and should be in the social sector instead. The other thing is re: anti-social behaviour. Used to landlord liaison officer in LA. Now the local authority tells the tenant that they should stay in the property until they are physically evicted. This adds cost to landlord that could be avoided. Would rather have empty property than the risk. Still WG is not listening. Need to put landlords on taskforce group so that we can funnel the information over. The lack of supply is there – landlords have given up and*

leaving empty properties. Made things worse. Extra council tax on empty properties. Too expensive to do things with the properties.”

- *The market is totally different. Young professional, student let is staying for 1 year or 2. Last consultation focused on people remaining 20+ years in a house. One-sized fits all approach. Large companies building lots of property is competition with expensive properties in city centres. REITs and Banks are buying up lets and pushing smaller landlords out of the market.*
- *If the issue is about supply/statistics and data/social housing supply and requirements/government potentially not allowing market rental to play out. What is the purpose of fair rental if the market is driving the rent based on supply and demand. Go back to the original reason – it has nothing to do with fair rent. It is supply. Ease availability in Wales.*
- *In England there is permitted development, which is not allowed in Wales. Areas like Bridgend have areas that could be developed, but the process is cumbersome.*
- *How does that equate to fair rental? How would that help the supply?*
- *Want to highlight the cumulative impact of changes over last 10 years – stamp duty, tax changes on interest relief, HMO requirements, Rent Smart licensing and adhering to rules – could be a risk of landlords leaving the market. Re: social housing supply – amount of social housing now compared to 10 years ago – what has been the increase. With student property that will likely go into the private sector soon, would that be covered by any of these changes.*
- *Talking about fair rent: it seems fair rent is as low as you can possibly get it. It can often be unfair not to charge more rent. Portfolio landlord and run house-buying company. Let's say £1100 a month for rent. Spent £30/40k renovating to high quality. They come in saying it is expensive – well compared to what? Last house was £650, but landlord did no maintenance. You have to charge enough to provide a quality service. Banks are stress tested. They have to prove they can be robust if wheels fall off. As a landlord, you need to be able to weather a tenant that cannot pay – cover lost rent, fees, etc. – at the same time you need a buffer but still make a profit. “We buy run down property in Wales. 120 year old mining cottages. Built as slums. They cost disproportionately more to maintain. Ex-local authority council houses are in poor state. If we did not charge what we charge in rent, we could not maintain properties to that standard. Fair Rent has to be enough to provide the service.”. If you did stress test and tenant couldn't afford it, but if you have to replace a roof then you still need those costs covered.*
- *Empty properties all over Wales. Down to LAs to do more. Bring empty properties back into use. People are content to leave properties empty. LAs have power to bring them into use. LA should enforce and get bad landlords. Stop punishing good landlords.*
- *The empty homes grant is deliberately out-of-reach – means-testing means that landlords don't qualify.*
- *All landlords to keep bad landlords out of sector existed before renting homes act and RSW. The issue was that it wasn't being enforced.*

ANNEX 2 – SLIDO WORKSHOP RESPONSES

Workshop Participants were asked the following questions at each workshop session:

- What is the first thing you think of when you hear "fair rent"?
- During the tenancy how many times has the rent increased (in the last 3 years)?
- If the rent has increased, by how much overall?
- What was the reason for the rent increase?
- How long have you been in your current property?
- How long did it take you to find a property/tenant?
- Why did your last tenancy end?
- What is the main reason why you are a landlord?
- What things make a "good home"?
- In order of preference, which of the following are the most important in renting a property?

Some respondents may have answered a question more than once where they owned more than one property, so not all totals will equal 100%.

What is the first thing you think of when you hear "fair rent"?

Llandudno Workshops

What is the first thing you think of when you hear "fair rent"?

0 1 3

Fair for whom Implies unfair
Risk no investment Concern
Pay rent Social housing rents
Rent control Unrealistic Panic
Location The offer/ facilities Affordable
Risky inflation Fair to whom
Marketplace assessment
Fair rent for the area

What is the first thing you think of when you hear "fair rent"?

037

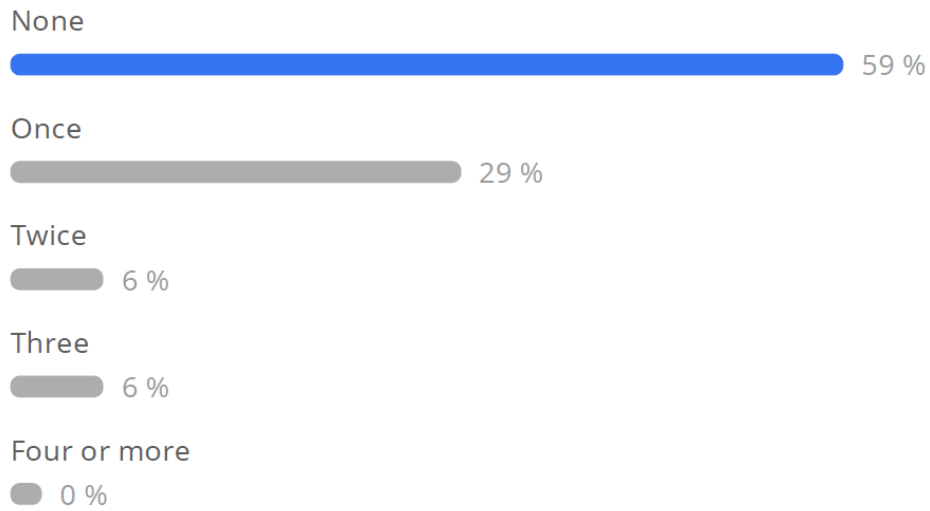


During the tenancy how many times has the rent increased (in the last 3 years?)

Llandudno Workshops

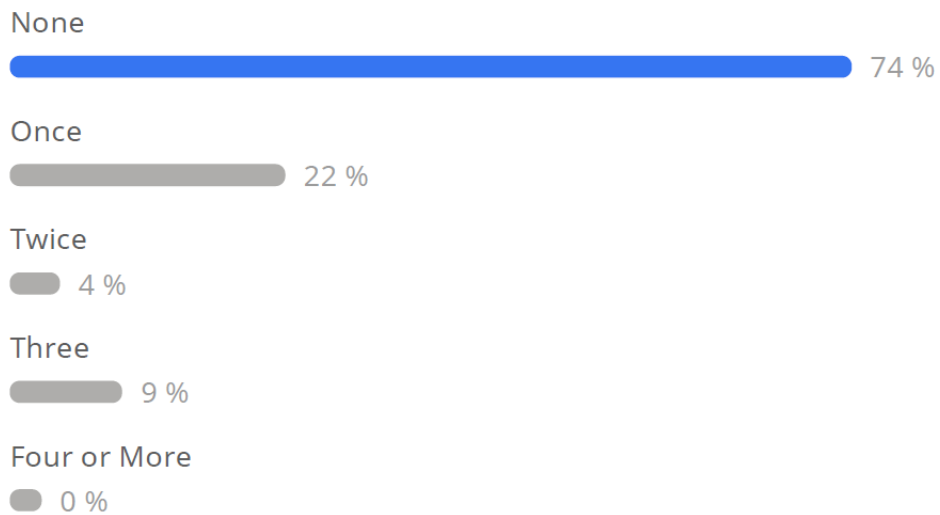
During the tenancy how many times has the rent increased (in the last 3 years?)

0 1 7



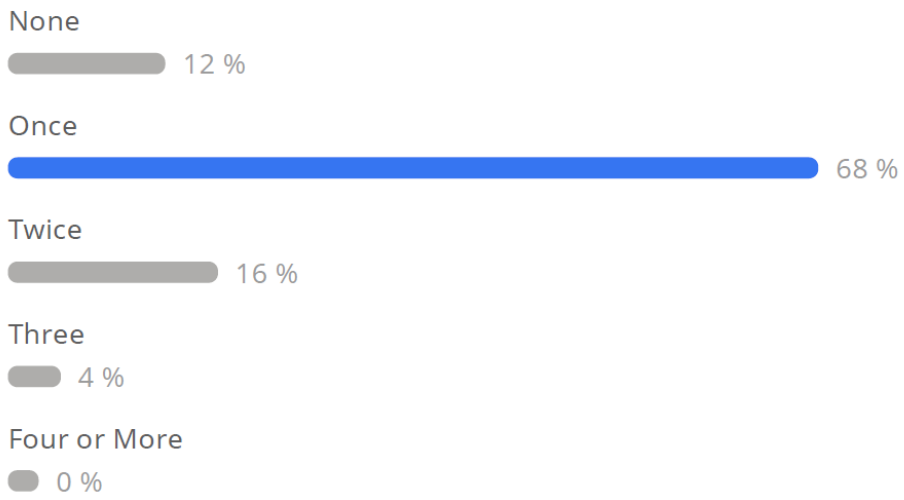
During the tenancy how many times has the rent increased (in the last 3 years?)

0 2 3



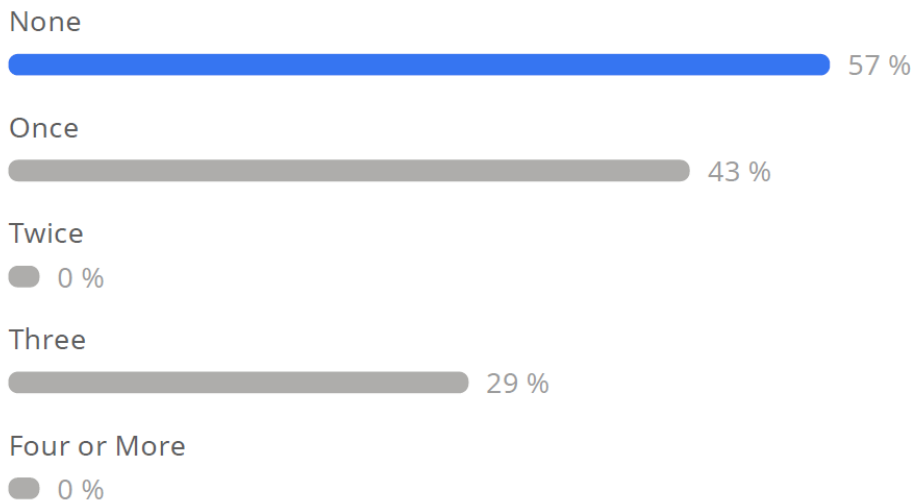
During the tenancy how many times has the rent increased (in the last 3 years?)

025



During the tenancy how many times has the rent increased (in the last 3 years?)

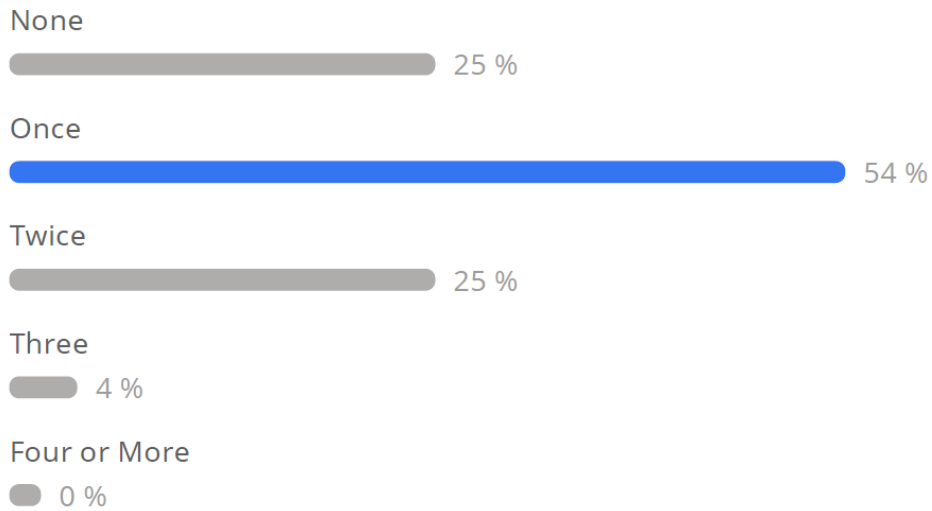
007



Cardiff Workshops

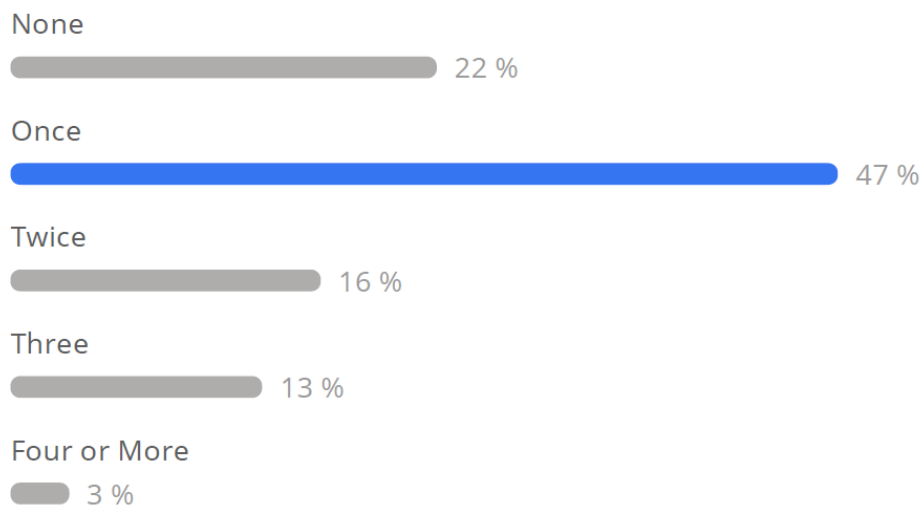
During the tenancy how many time has the rent increased (in the last 3 years)?

0 2 8



During the tenancy how many times has the rent increased (in the last 3 years)?

0 3 2

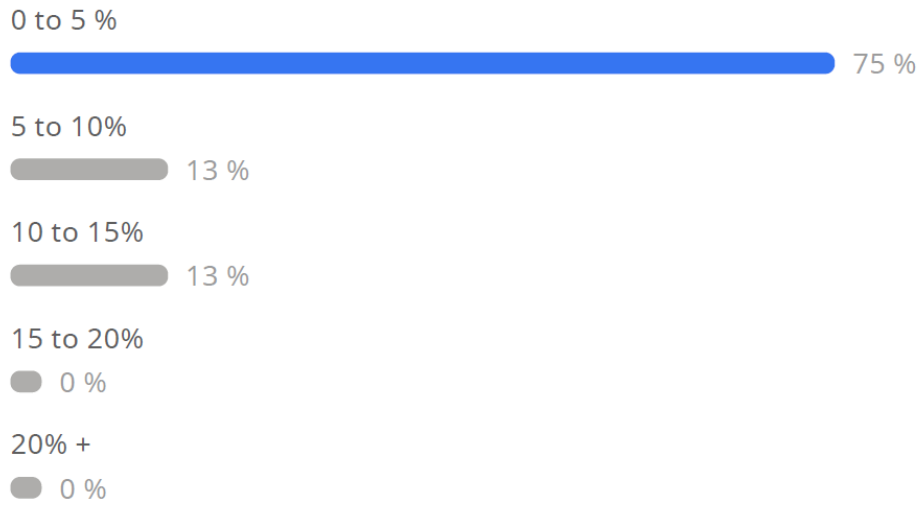


If the rent has increased, by how much overall?

Llandudno Workshop

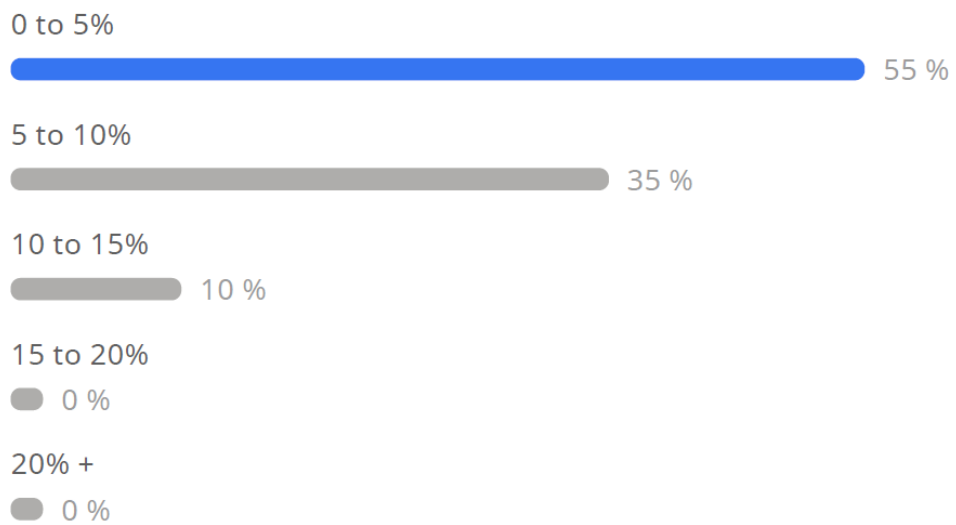
If the rent has increased, by how much overall?

016



If the rent increased, by how much overall?

020



Carmarthen Workshop

If the rent has increased, by how much overall?

0 2 5

0 to 5%



5 to 10%



10 to 15%



15 to 20%



20% +



If the rent has increased, by how much overall?

0 0 7

0 to 5%



5 to 10%



10 to 15%



15 to 20%



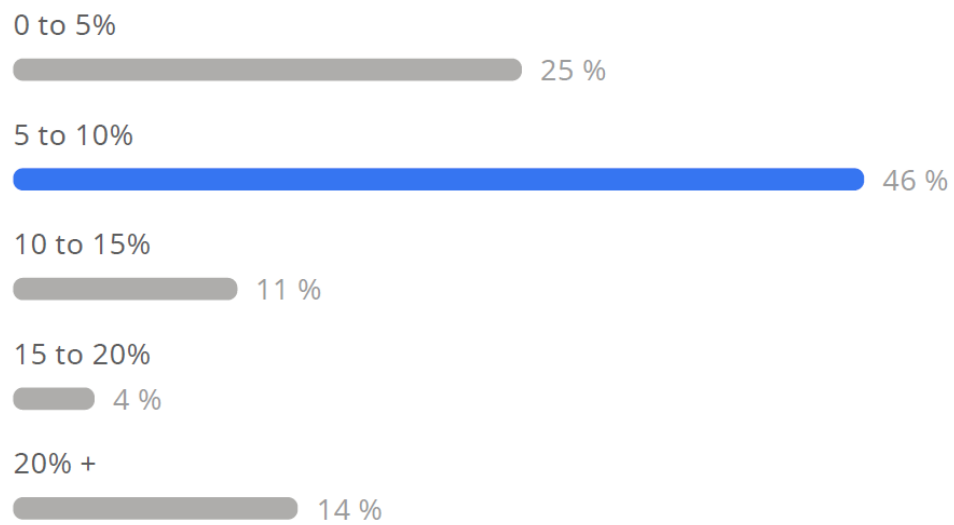
20% +



Cardiff Workshops

If the rent has increased, by how much overall?

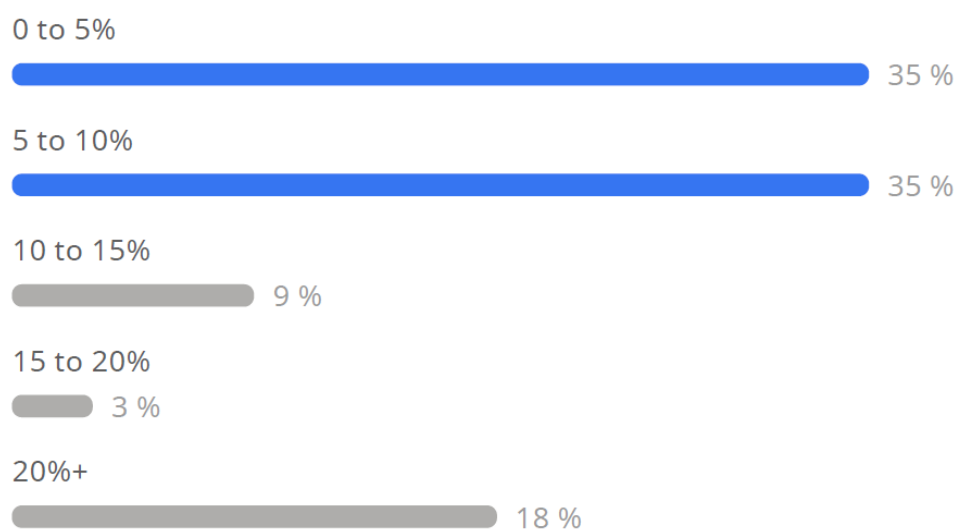
0 2 8



- What was the reason for the rent increase?
- What was the reason for the rent increase?

If the rent has increased, by how much overall?

0 3 4



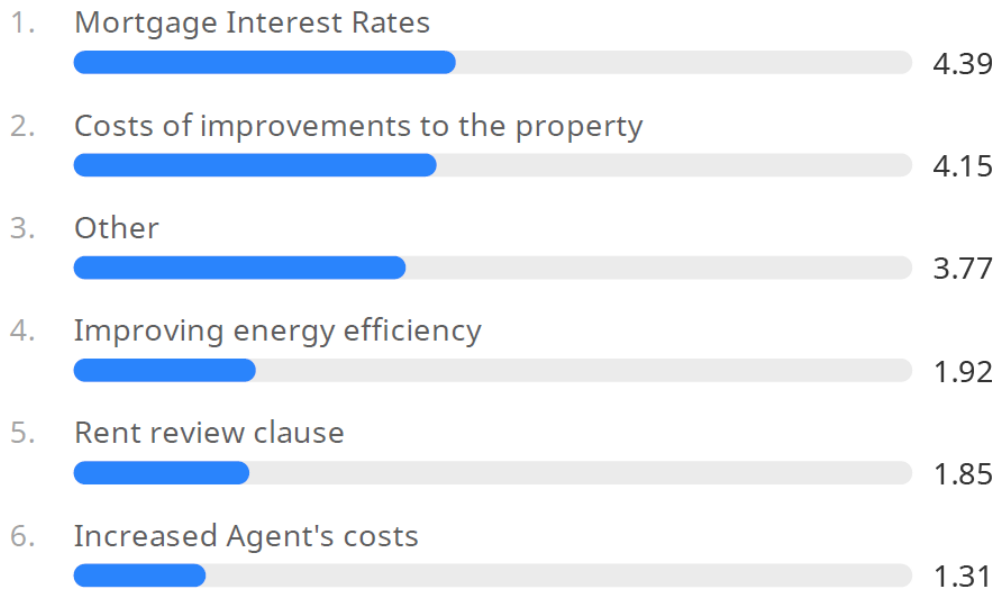
What was the reason for the rent increase?

Llandudno Workshop

What was the reason for the rent increase?

0 1 3

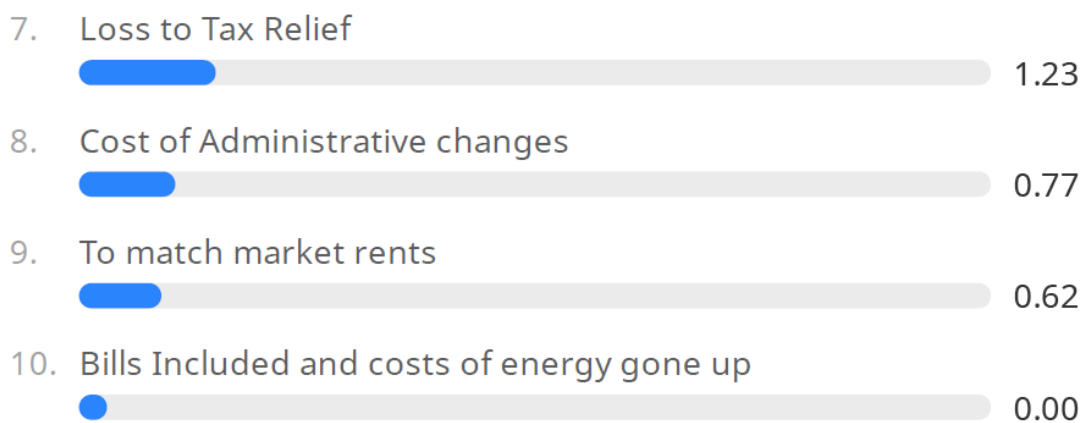
(1/2)



What was the reason for the rent increase?

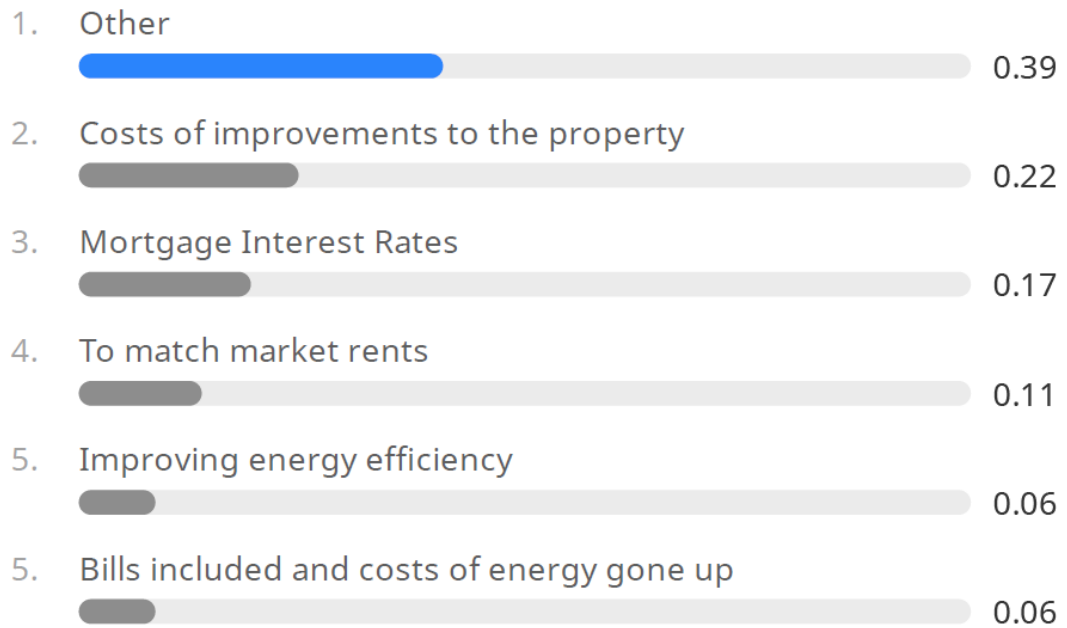
0 1 3

(2/2)



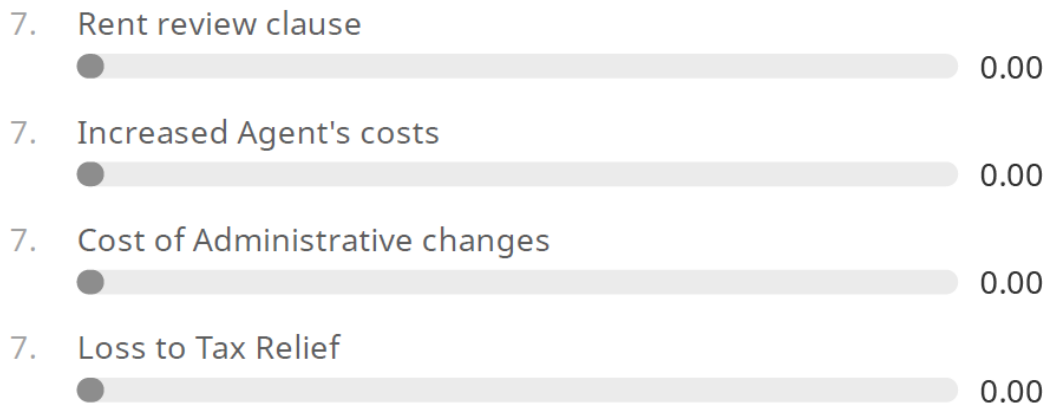
What was the reason for the rent increase? (1/2)

0 1 8



What was the reason for the rent increase? (2/2)

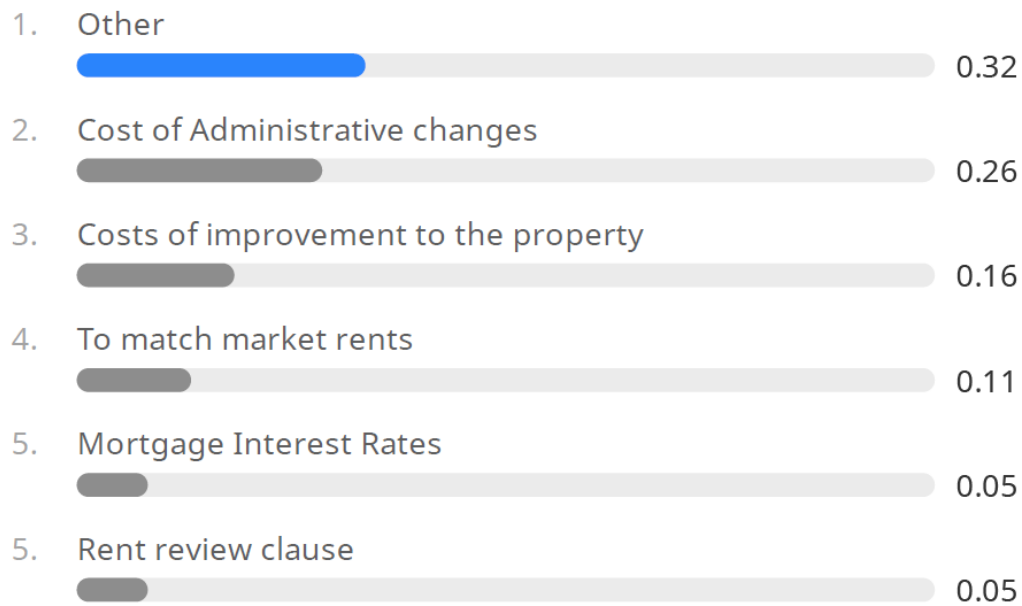
0 1 8



Carmarthen Workshops

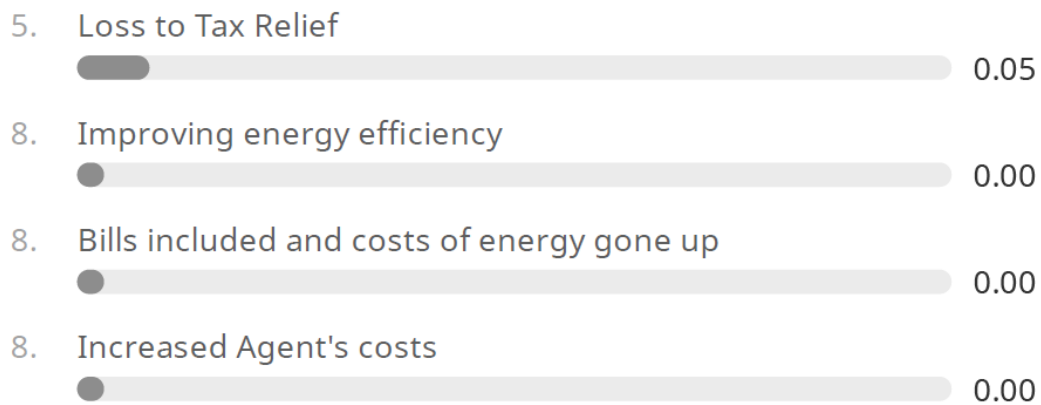
What was the reason for the rent increase?
(1/2)

0 1 9



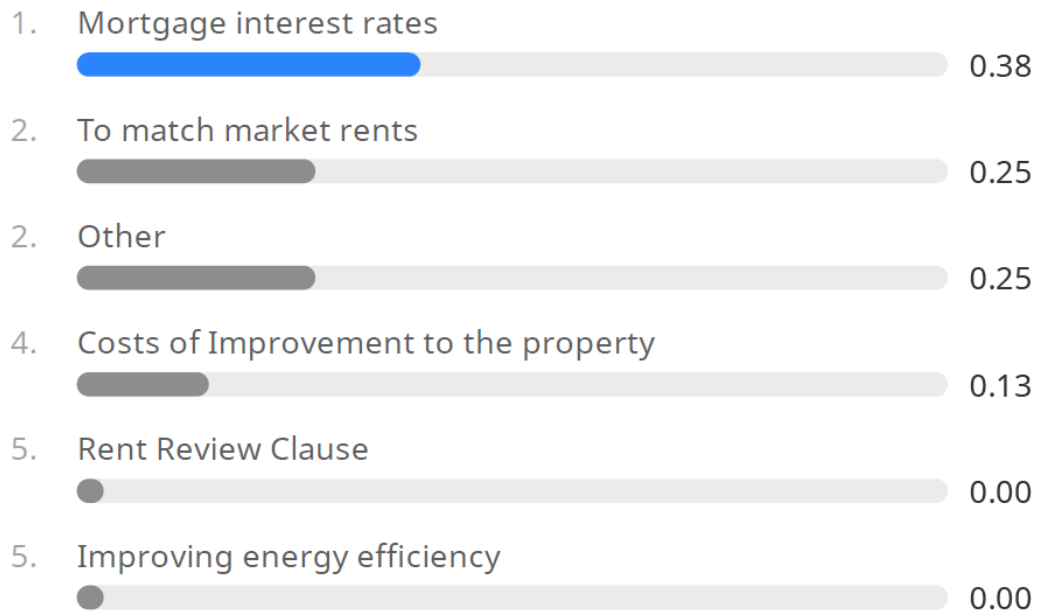
What was the reason for the rent increase?
(2/2)

0 1 9



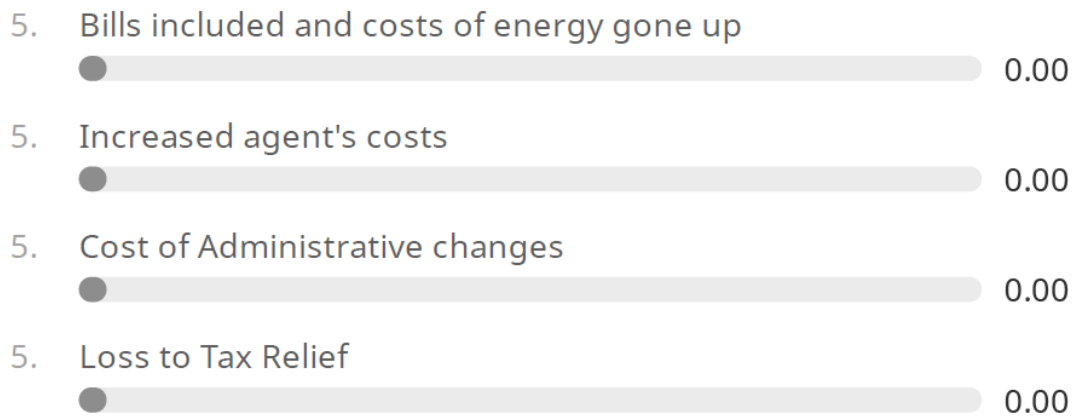
What was the reason for the rent increase?
(1/2)

0 0 8



What was the reason for the rent increase?
(2/2)

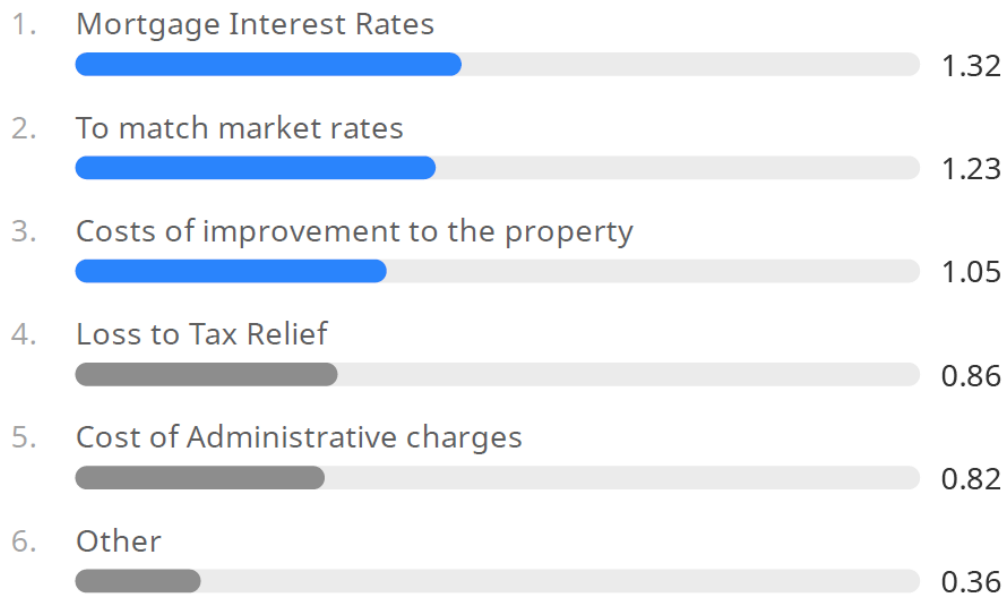
0 0 8



Cardiff Workshops

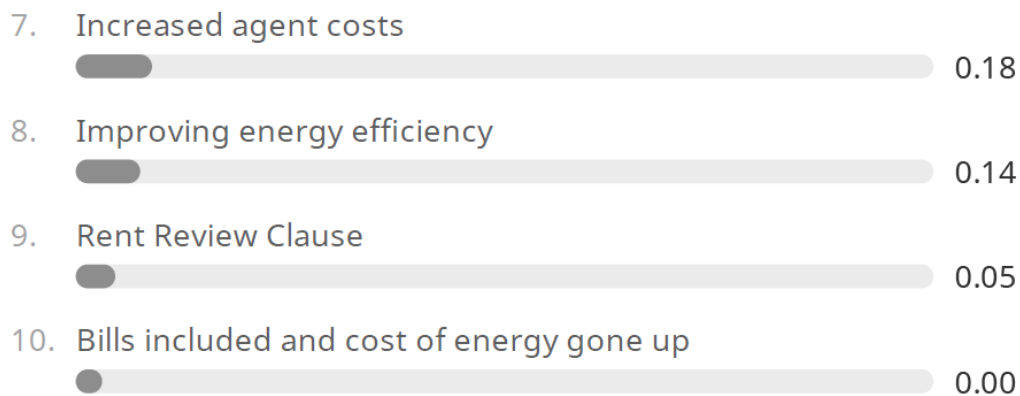
What was the reason for the rent increase?
(1/2)

0 2 2



What was the reason for the rent increase?
(2/2)

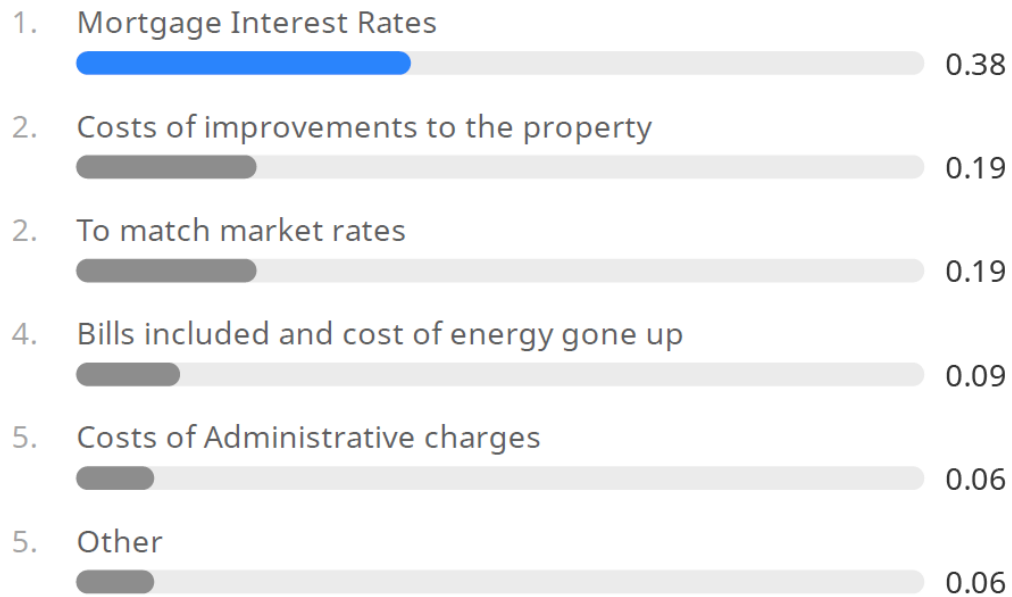
0 2 2



What was the reason for the rent increase?

0 3 2

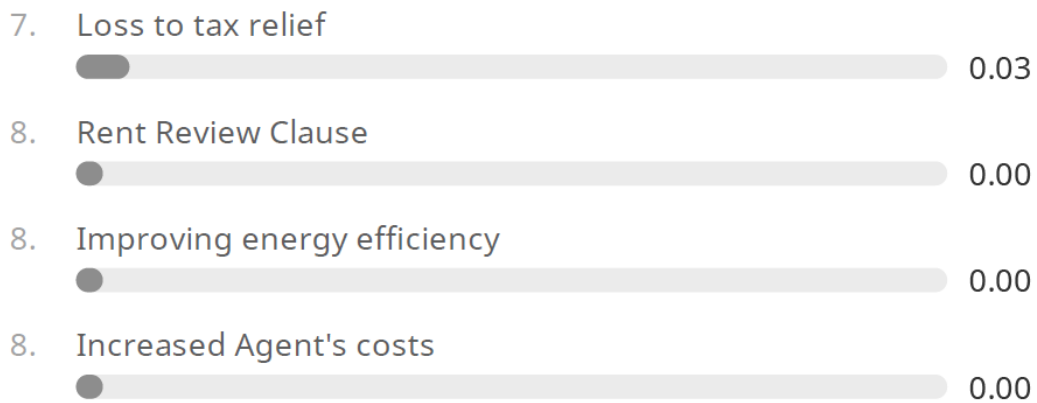
(1/2)



What was the reason for the rent increase?

0 3 2

(2/2)



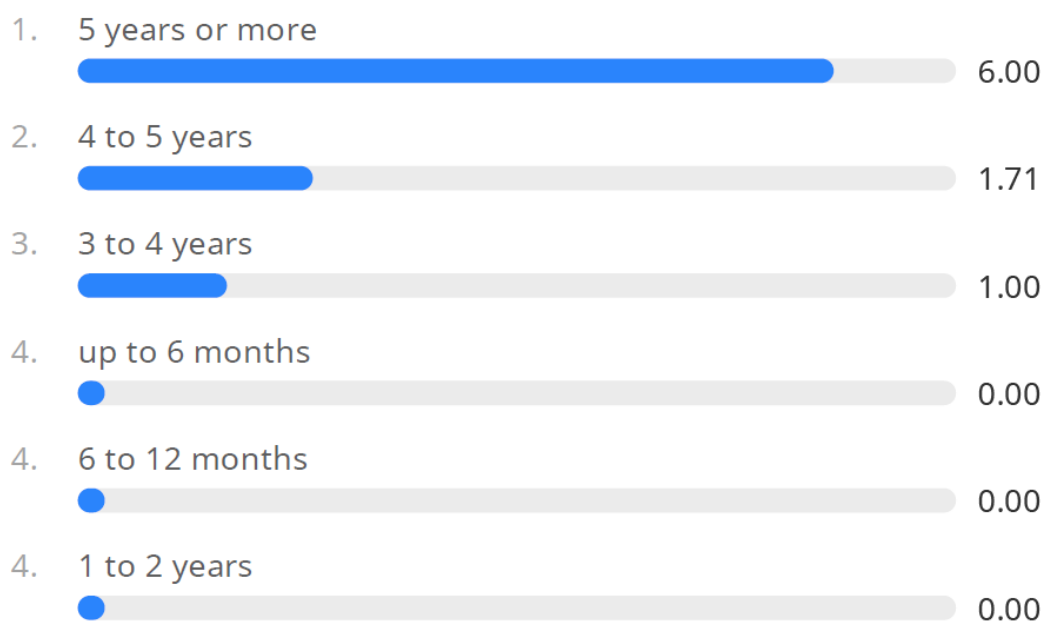
How long have you been in your current property?

Llandudno Workshops

How long have you been in your current property?

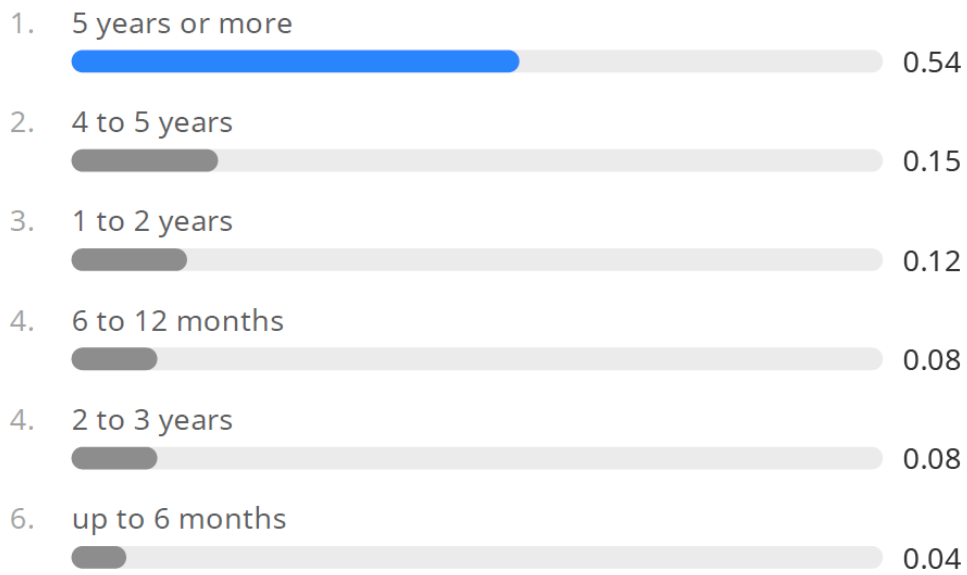
007

(1/2)



How long have you been in your current property? (1/2)

0 2 6

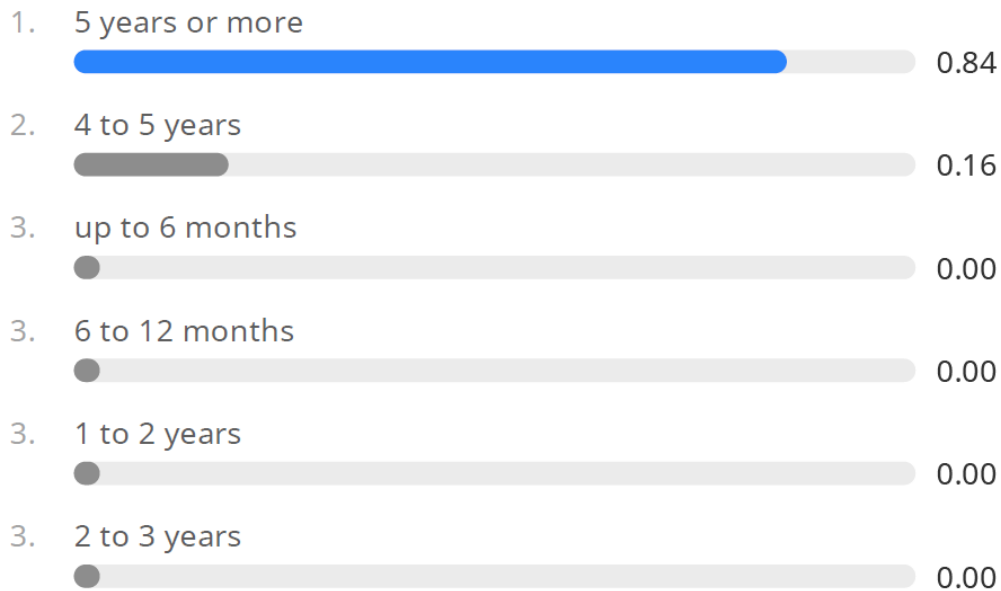


Carmarthen Workshops

How long have you been in your current property?

0 1 9

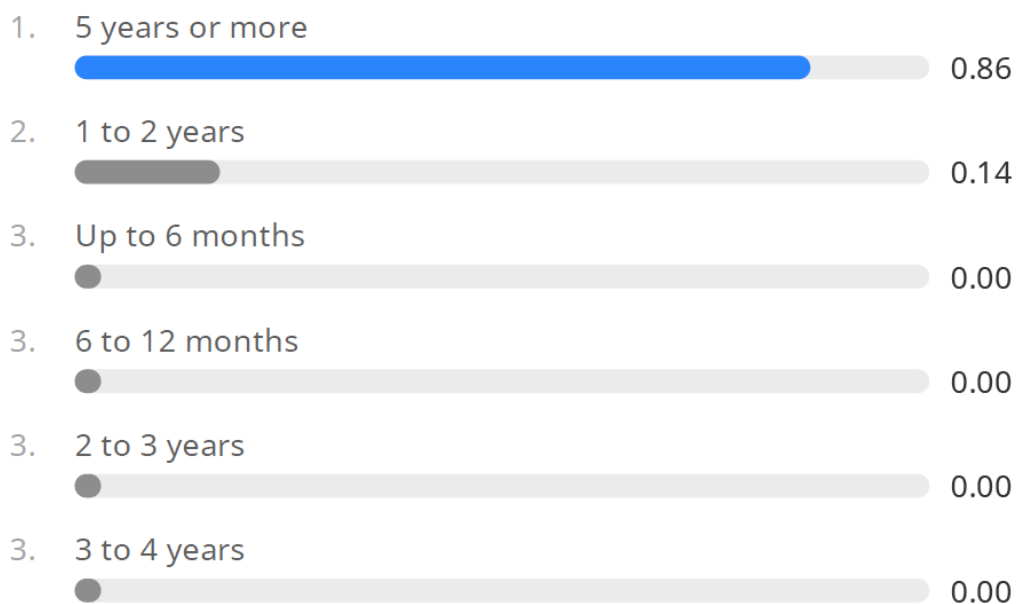
(1/2)



How long have you been in your current property?

0 0 7

(1/2)

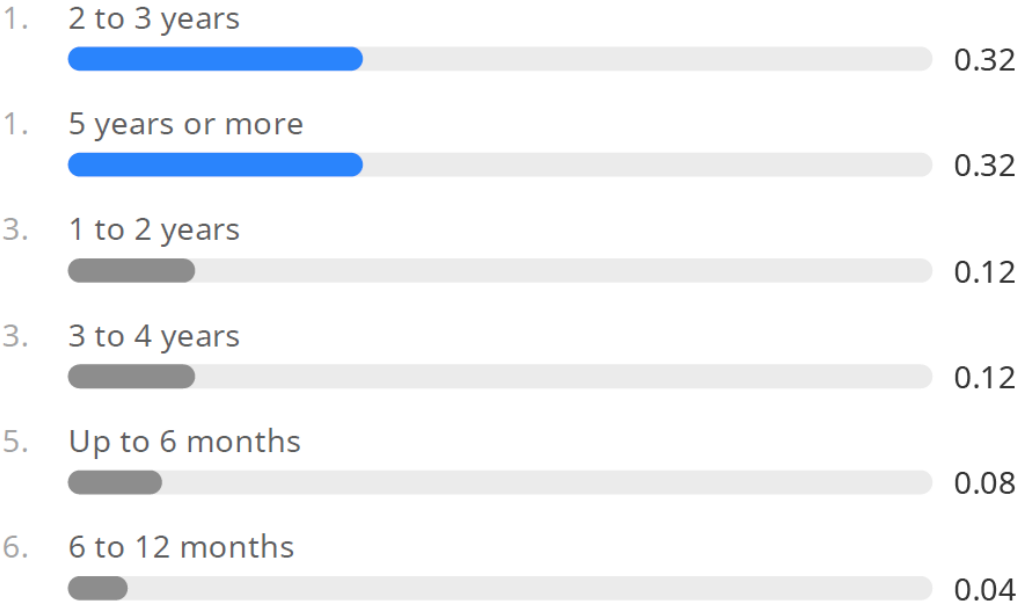


Cardiff Workshops

How long have you been in your current property?

0 2 5

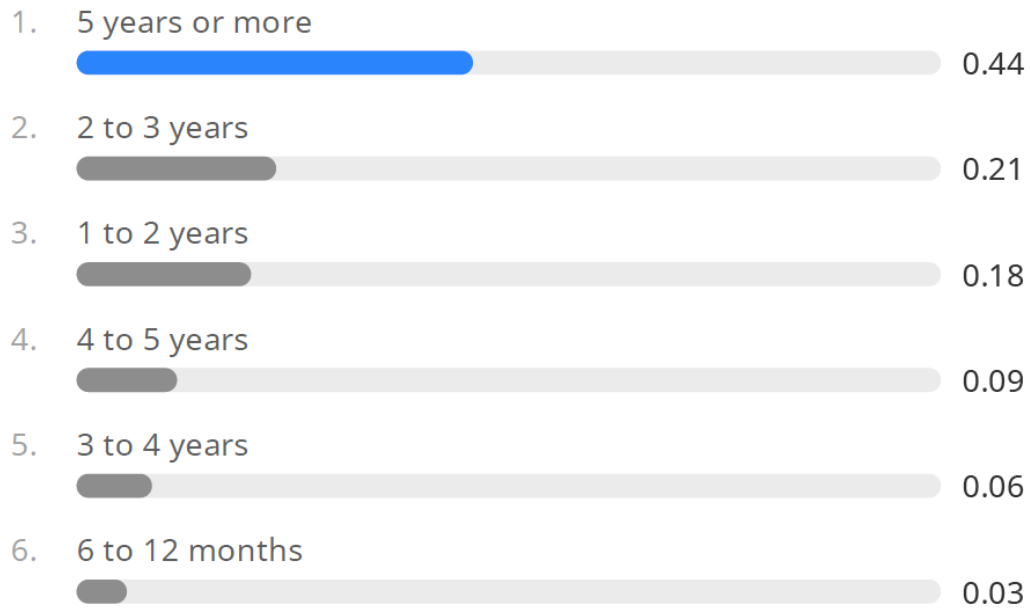
(1/2)



How long have you been in your current property?

0 3 4

(1/2)

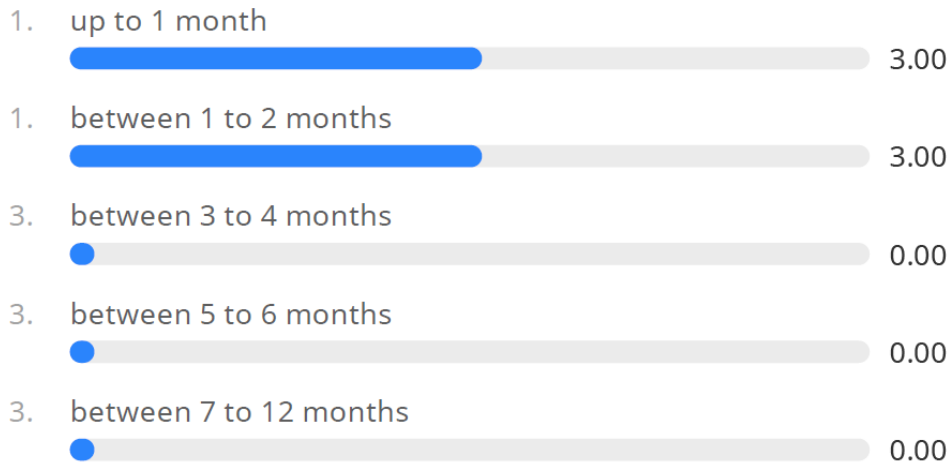


How long did it take you to find a property/tenant?

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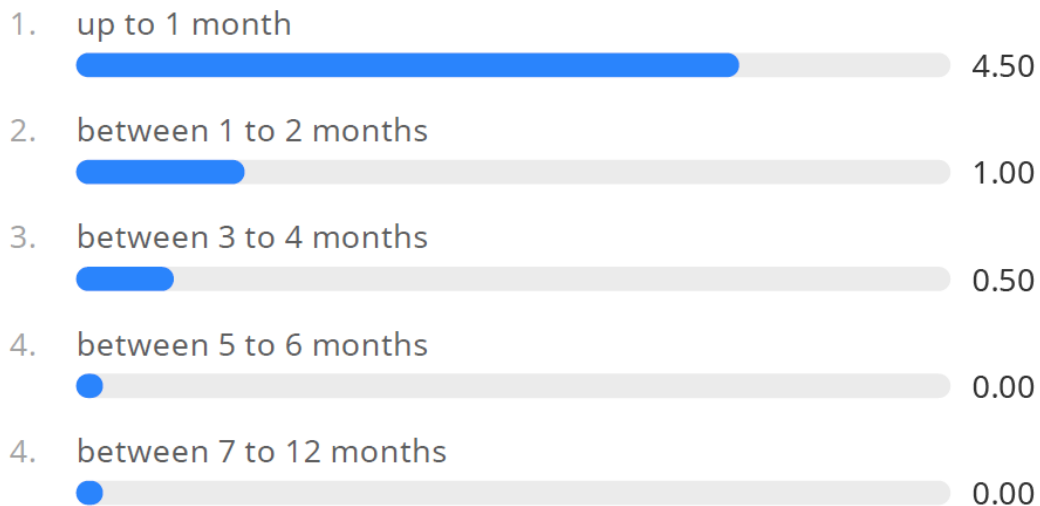
How long did it take you to find a property/tenant? (1/2)

0 1 2



How long did it take you to find a property / tenant (1/2)

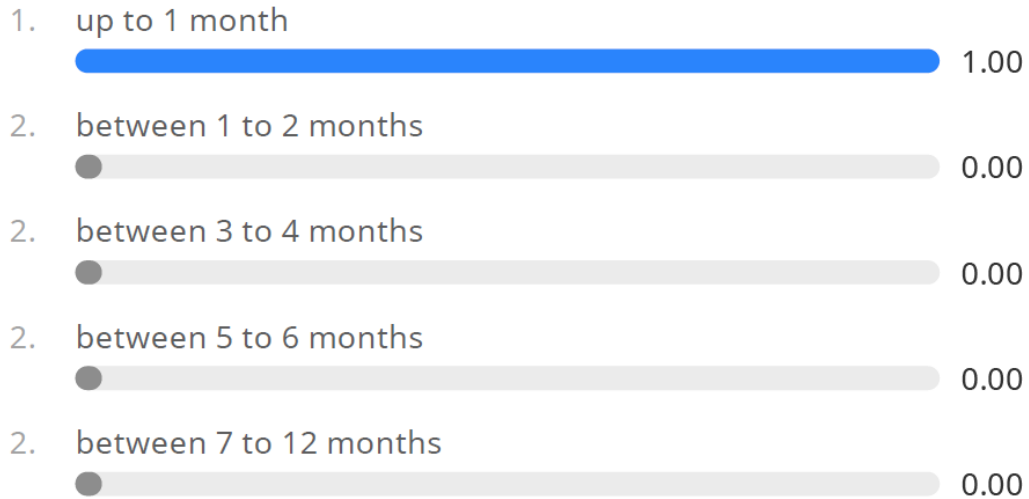
0 2 4



Carmarthen Workshops

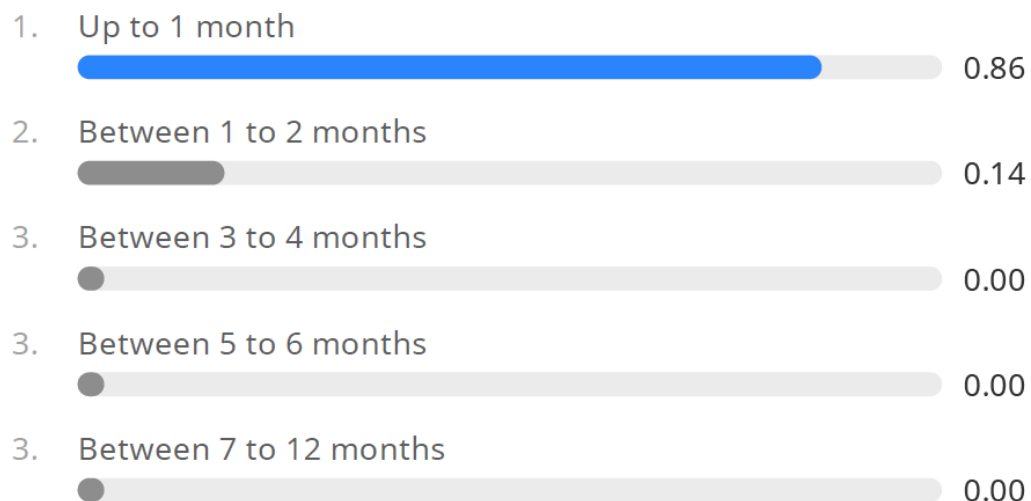
How long did it take you to find a property / tenant
(1/2)

0 1 8



How long did it take you to find a property / tenant?
(1/2)

0 0 7

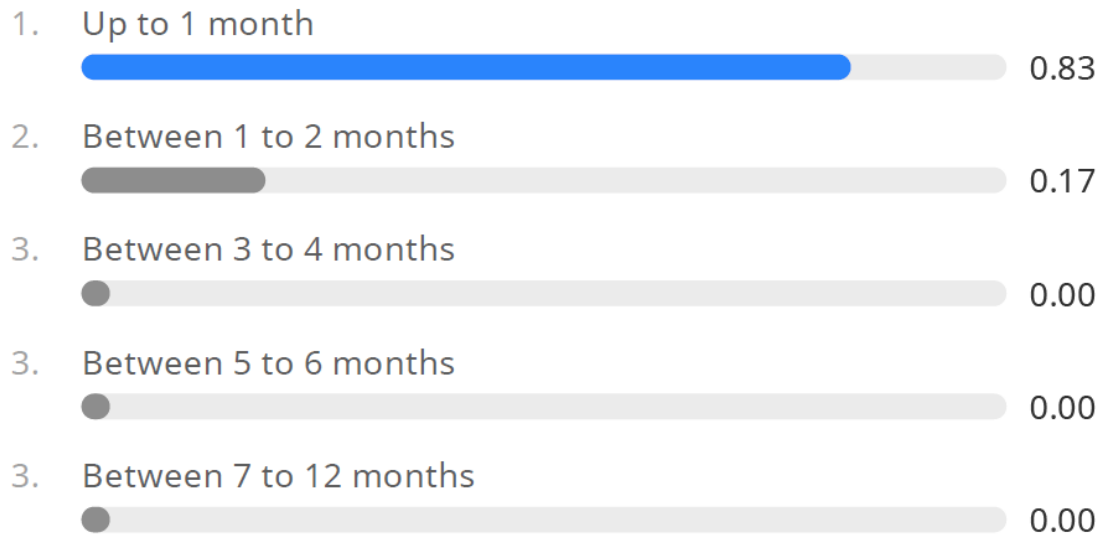


Cardiff Workshops

How long did it take you to find a property / tenant?

0 2 3

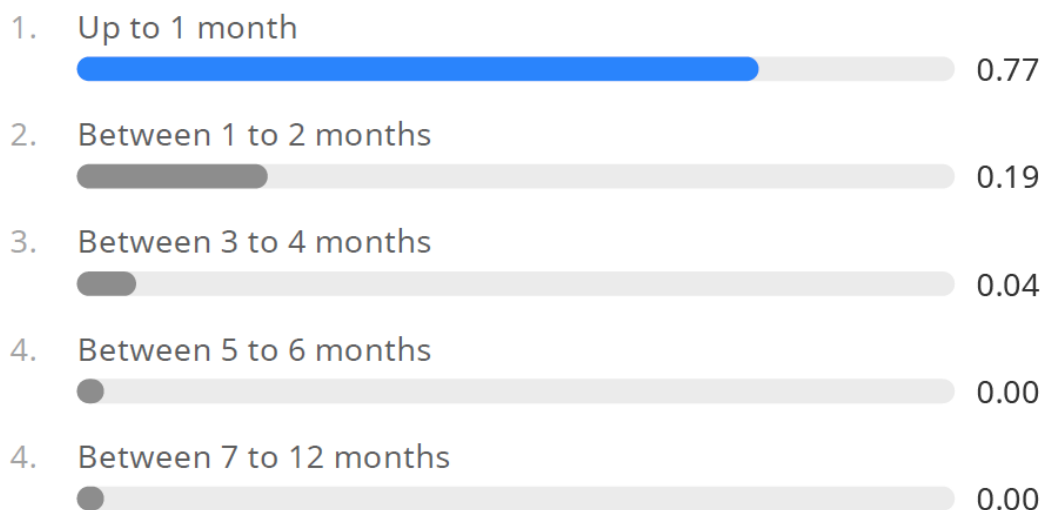
(1/2)



How long did it take you to find a property / tenant?

0 2 6

(1/2)



Why did your last tenancy end?

Llandudno Workshops

Why did your last tenancy end?

(1/2)

0 1 4

Contract ended - tenant found alternative property



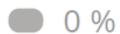
Eviction Notice Served - Rent Arrears



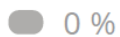
No Fault (No Grounds) Notice Served



Property in poor state of repair



Anti-Social Behaviour - tenant damaged the property



Landlord Sold Property

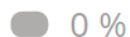


Why did your last tenancy end?

(2/2)

0 1 4

It hasn't - no previous tenancy/tenant



Other



Why did your last tenancy end?

0 2 0

(1/2)

Contract ended - tenant found alternative property



Eviction Notice Served - Rent Arrears



No Fault (No Grounds) Notice Served



Property in poor state of repair



Anti-Social Behaviour - tenant damaged the property



Landlord Sold Property



Why did your last tenancy end?

0 2 0

(2/2)

It hasn't - no previous tenancy / tenant



Other



Carmarthen Workshops

Why did your last tenancy end? (1/2)

0 2 2

Contract ended - tenant found alternative property



Eviction Notice Served - Rent Arrears



No Fault - (No Grounds) Notice Served



Property in poor state of repair



Anti-Social Behaviour - tenant damaged the property



Landlord Sold Property



Why did your last tenancy end? (2/2)

0 2 2

It hasn't - no previous tenancy/tenant

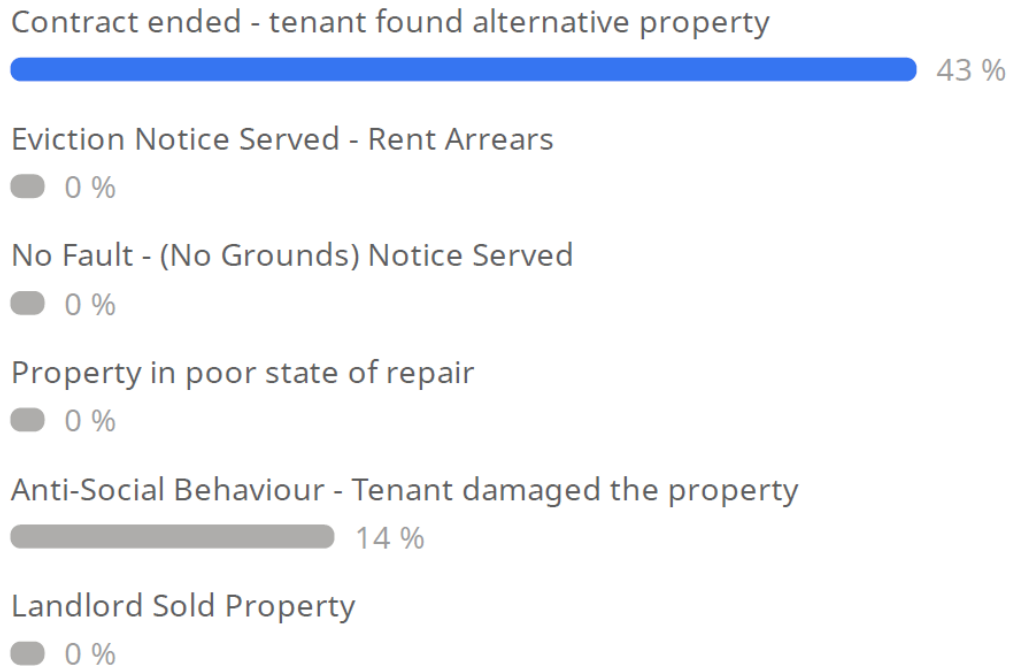


Other



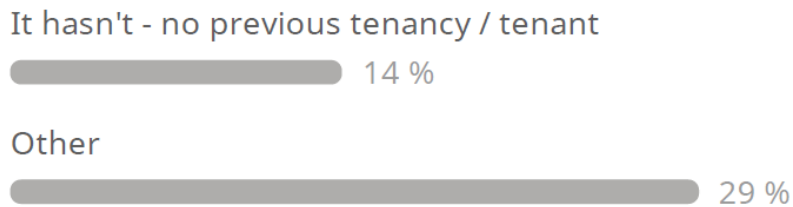
Why did your last tenancy end? (1/2)

007



Why did your last tenancy end? (2/2)

007



Cardiff Workshops

Why did your last tenancy end? (1/2)

0 2 8

Contract ended - tenant found alternative property



Eviction Notice Served - Rent Arrears



No Fault (No Grounds) Notice Served



Property in poor state of repair



Anti-Social Behaviour - tenant damaged the property



Landlord Sold Property



Why did your last tenancy end? (2/2)

0 2 8

It hasn't - no previous tenancy / tenant

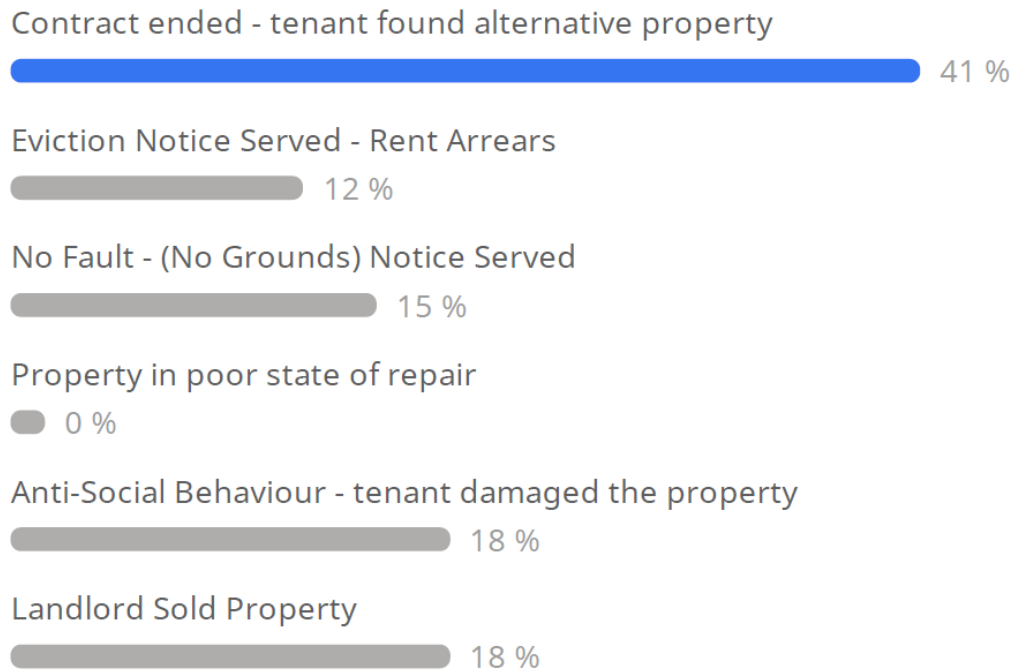


Other



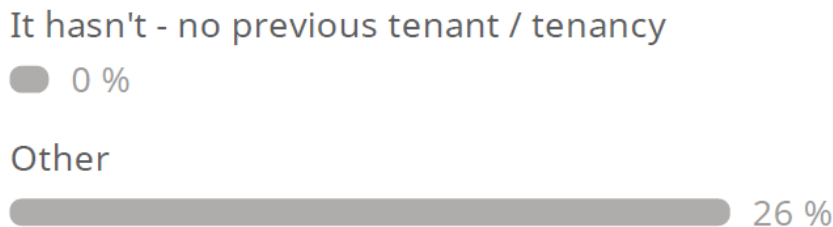
Why did your last tenancy end? (1/2)

0 3 4



Why did your last tenancy end? (2/2)

0 3 4



What is the main reason why you are a landlord?

Llandudno Workshops

What is the main reason why you are a landlord?

0 1 3



What is the main reason why you are a landlord?

0 2 2



Carmarthen Workshops

What is the main reason why you are a landlord?

0 2 2



What is the main reason why you are a landlord?

0 0 5

Business No work in Ceredigion
Pension pot

pension

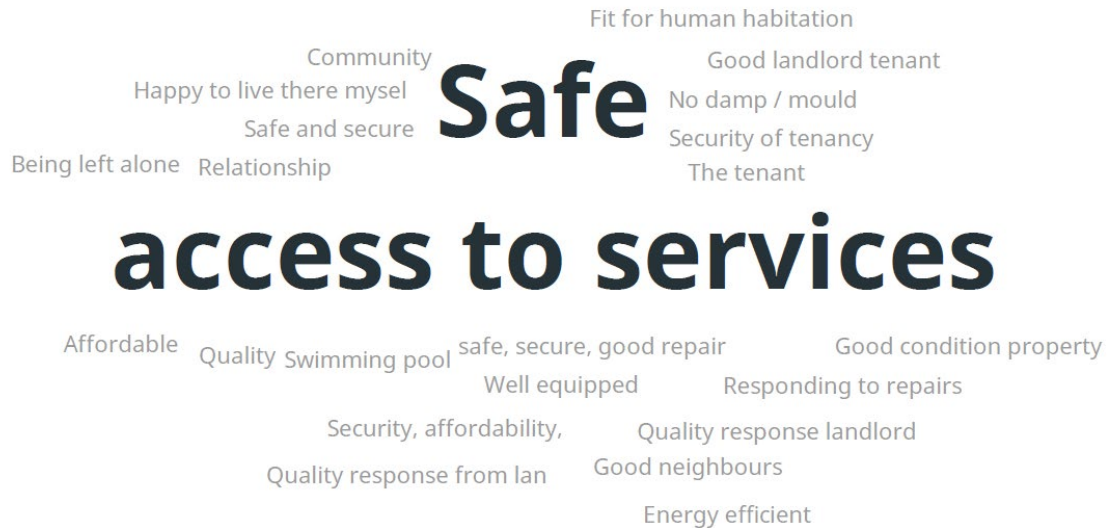
My pension investment retire early Investment
Less work than normal job
Accident to begin with

Cardiff Workshops

Llandudno Workshops

What things make a "good home"?

0 1 4



What things make a "good home"?

0 2 0



Carmarthen Workshops

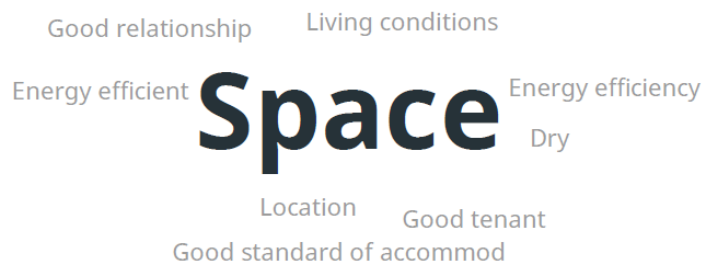
What things make a "good home"?

0 2 3



What things make a "good home"?

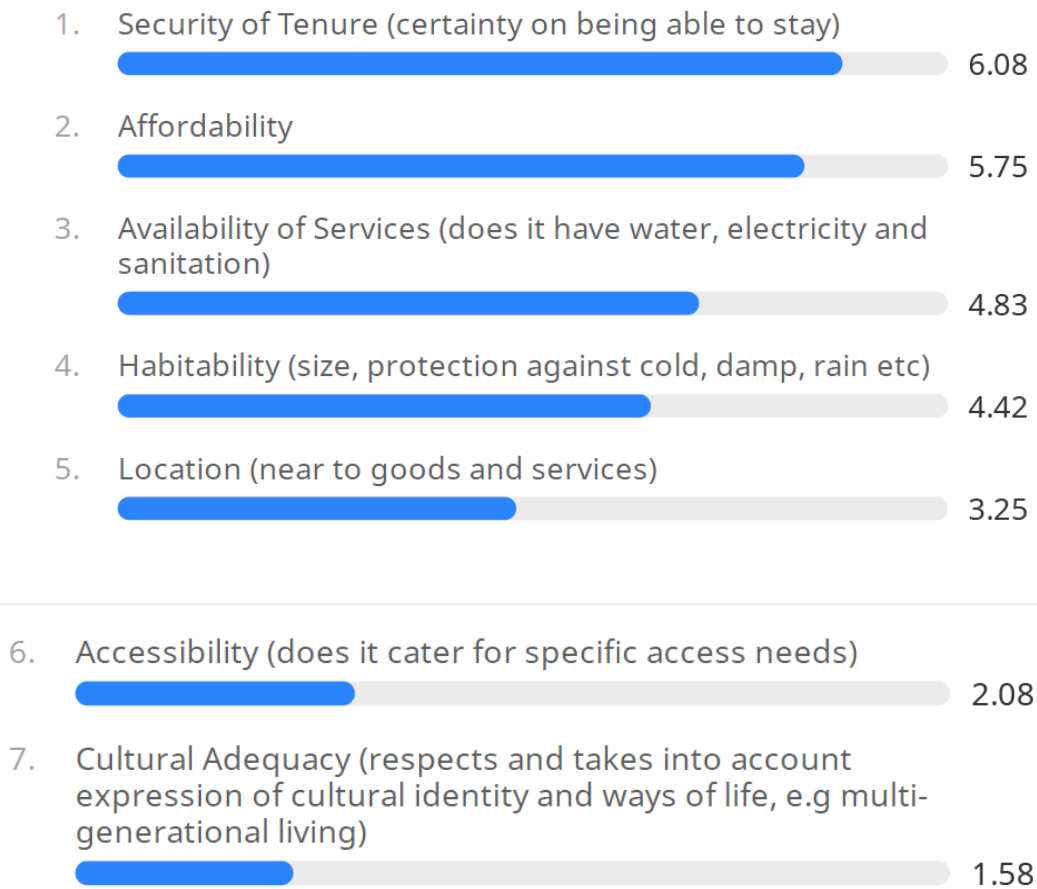
0 0 4



Cardiff Workshops

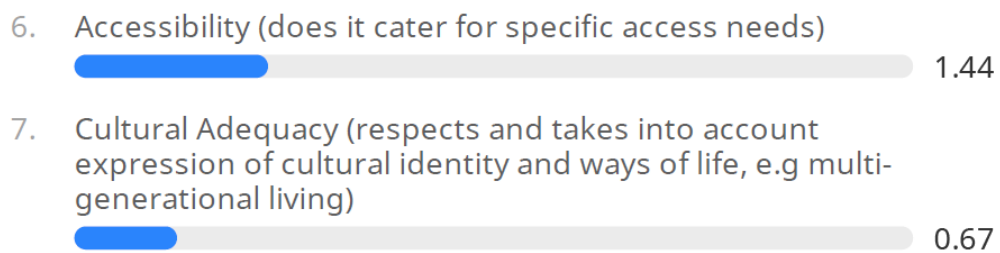
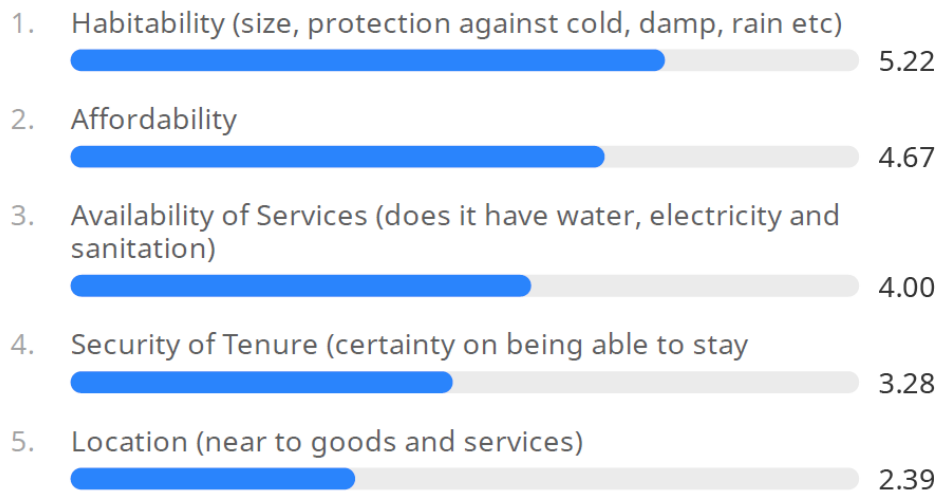
In order of preference, which of the following are the most important in renting a property?
(1/2)

0 1 2



In order of preference, which of the following are the most important in renting a property?
(1/2)

018



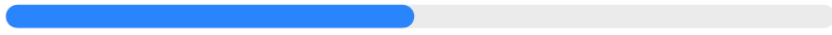





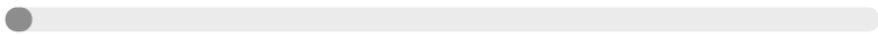
Carmarthen Workshops

In order of preference, which of the following are the most important in renting a property?

0 2 1

(1/2)

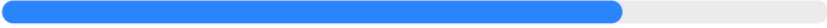


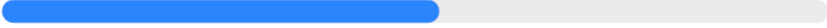
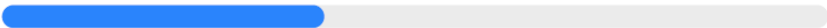
1. Habitability (size, protection against cold, damp, rain etc)
 2.24
2. Location (near to goods and services)
 1.57
3. Availability of Services (does it have water, electricity and sanitation)
 1.43
4. Affordability
 0.43
5. Security of Tenure (certainty on being able to stay)
 0.24

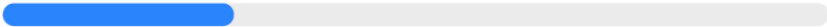

-
6. Cultural Adequacy (respects and takes into account expression of cultural identity and ways of life, e.g multi-generational living)
 0.10
 7. Accessibility (does it cater for specific access needs)
 0.00
-

In order of preference, which of the following are the most important in renting a property?

005

(1/2)

1. Habitability (size, protection against cold, damp, rain etc)
 5.20
2. Security of Tenure (certainty on being able to stay)
 4.60
3. Location (near to goods and services)
 4.40
4. Affordability
 3.60
5. Availability of Services (does it have water, electricity and sanitation)
 2.60

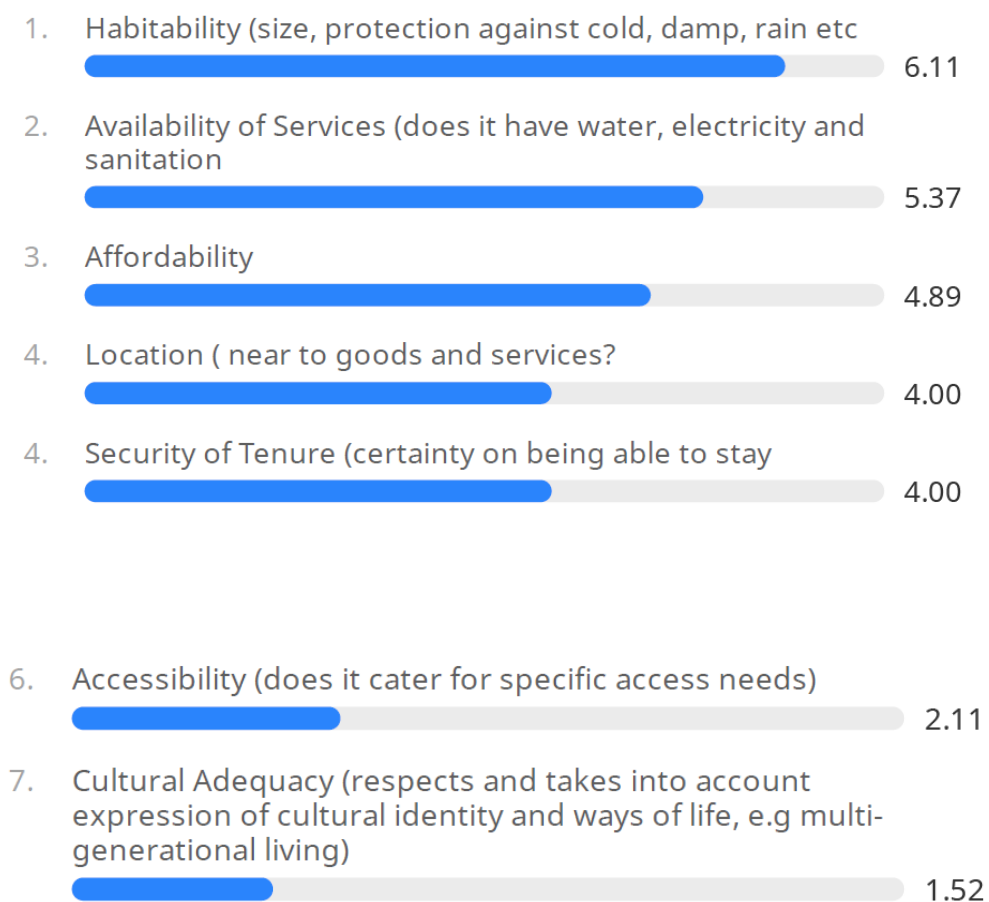
-
6. Accessibility (does it cater for specific access needs)
 1.80
 7. Cultural Adequacy (respects and takes into account expression of cultural identity and ways of life, e.g multi-generational living)
 0.80
-

Cardiff Workshops

In order of preference, which of the following are the most important in renting a property?

0 2 7

(1/2)



In order of preference, which of the following are the most important in renting a property?

0 3 5

(1/2)

