

Welsh Housing Monitor



Llywodraeth Cymru
Welsh Government



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INTRODUCTION

State of the housing nation

Welcome to the Welsh Housing Monitor, a publication that brings together a wealth of data to offer you the most detailed picture available of homes and housing in Wales.

The Monitor draws on official statistics published at Wales and UK level to map out trends across four key aspects of the housing system. The report is based on the most recent data available as at the end of November 2025.

Chapter 1 assesses housing supply and the most recently available estimate of housing need. It considers how Wales has performed on affordable housing supply against the Welsh Government's target of 20,000 new low-carbon social homes for rent in this Senedd term (2021 to 2026). It then broadens the focus to the supply of homes of all tenures, though here the evidence is much less certain, with different measures pointing to different findings. The chapter concludes with a look at the supply of existing homes: transactions in the housing market; lettings in social housing; and empty and second homes.

Chapter 2 considers quality and standards, key issues for a country that has the oldest housing stock in Europe. Evidence is still emerging in this area, with decarbonisation work underway across tenures, social landlords working to meet the Welsh Housing Quality

Standard 2023 and developers and landlords focussed on fire safety issues in their buildings. As the Welsh Government prepares for what will be the first Welsh Housing Survey in ten years, the chapter looks at work on energy efficiency, housing hazards and improvements and building safety.

Chapter 3 looks at affordability. House prices and private rents in Wales may seem relatively affordable by comparison with some other parts of the UK but seen against Welsh incomes there are acute affordability pressures. Some decisions in this area, such as the standard for social rents and policies to control the number of second homes, are taken in the Senedd while others, including levels of housing benefit to support low-income renters, are in the hands of the UK Government.

Finally, **Chapter 4** discusses homelessness. Wider economic and social pressures may trigger this most extreme form of housing need but the response to them is arguably the area in which Wales has made the most progress since devolution. Ten years on from far-reaching reform of the homelessness legislation and five years on from the 'no one left out' response to the COVID-19 pandemic, more action is on the way in pursuit of the aim of ending homelessness in Wales.

CHAPTER 1

Housing need and supply

Introduction

1. Supplying enough homes to meet the need for them is one of the foundations of a well-functioning housing system. Supply can come in different forms, through the building of new homes and the conversion of existing buildings, and a mix of different tenures will be required. A functioning housing system should also feature a healthy turnover of existing homes, whether for sale or for letting, and include action to maximise the available stock of housing by bringing empty homes back into use and addressing high numbers of second homes and holiday lets.

2. This chapter first considers housing need. New Housing need estimates were published in February 2026 are outside the scope of this report, but can be accessed at www.gov.wales/estimates-additional-housing-need-2025-based-html. Next it looks at affordable housing supply, the subject of the Welsh Government's 20,000-home target, before broadening the focus to the overall supply of homes. While the housebuilding starts and completions statistics suggest that supply is falling short of need, alternative measures of supply present a more optimistic picture.

3. The chapter concludes with a section on the supply of existing homes for sale and for let.

Housing need

4. Previous estimates derive from the [Future Wales National Plan 2040](#), which identified a need for 110,000 additional

homes in Wales between 2019 and 2039. However, it said that during the initial five years (2019/20 to 2023/24) an average of 7,400 additional homes would be required annually across all tenures, with close to two-thirds of these homes needed in Southeast Wales.

5. The plan derived from [2019-based estimates of housing need](#) published in 2020. The 7,400 a year figure was the central estimate in a range from 6,200 to 8,300 a year and included 1,100 additional homes a year to clear existing unmet need over those first five years. The plan also made the case that the provision of affordable homes should become 'a key focus' for housing delivery. The central estimate of 7,400 homes was split into 3,500 (48 per cent) affordable homes and 3,900 (52 per cent) market homes per year.

6. In 2022 the Welsh Government introduced a new approach to Local Housing Market Assessments (LHMAs) to provide a consistent framework within which they are undertaken. This includes a tool that supports local authorities and automates calculations to estimate the additional housing need by housing market areas and different tenures.

7. These assessments of need are a key driver for social housing projects that are funded by the Welsh Government and are important in underpinning local plans and investment decisions.

Affordable housing supply

8. The Welsh Government’s Programme for Government committed to a target of 20,000 new low carbon social homes for rent in this Senedd term (2021 to 2026). This section considers progress so far plus the wider picture on affordable housing supply.

9. [Official statistics](#) show that 3,530 affordable homes were delivered towards the target in 2024/25¹. Of these, 2,921 were for social rent (83 per cent), 344 were intermediate rent, 162 were shared ownership and 103 were affordable units delivered by other providers.

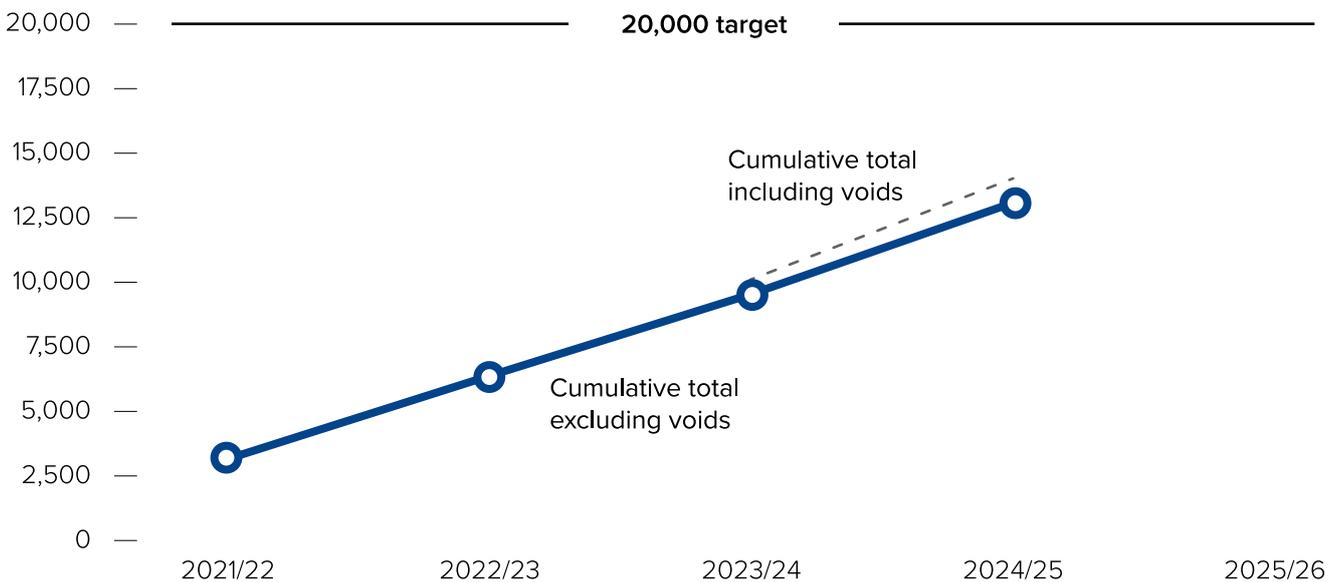
10. The target includes new homes and acquisitions as well as homes leased to provide accommodation for accommodation for families in need where the lease is for more than a year. Following a recommendation from the [Affordable Housing Taskforce](#), social housing

target now include long-term social housing voids brought back into use via the Transitional Accommodation Capital Programme (TACP). An additional 370 voids brought back into use brings the total for 2024/25 counting towards the target to 3,900.

11. Cumulative delivery since April 2021 – the first four years of the five-year target period – at the time of writing stands at 13,399 homes. This includes both new build (which accounts for 78 per cent of the total), acquisitions and 936 voids brought back into use between 2022/23 and 2024/25).

12. This was achieved despite big increases in construction costs. The average cost to build a home via the Social Housing Grant Programme increased by 78 per cent between 2021/22 and 2024/25.

Figure 1: Cumulative number of affordable homes delivered towards the 20,000 social homes target



Source: Stats.gov.wales affordable housing statistics.

¹ The target definition of affordable housing is slightly different to the definition used for additional affordable housing provision (see paragraph 17). The former includes homes leased for more than one year and long-term voids brought back into use that are not included in the latter in addition to homes for social rent, intermediate rent and shared ownership. Additional affordable housing provision (3,643 homes in 2024/25) includes shared equity affordable housing units that are not included in the target definition.

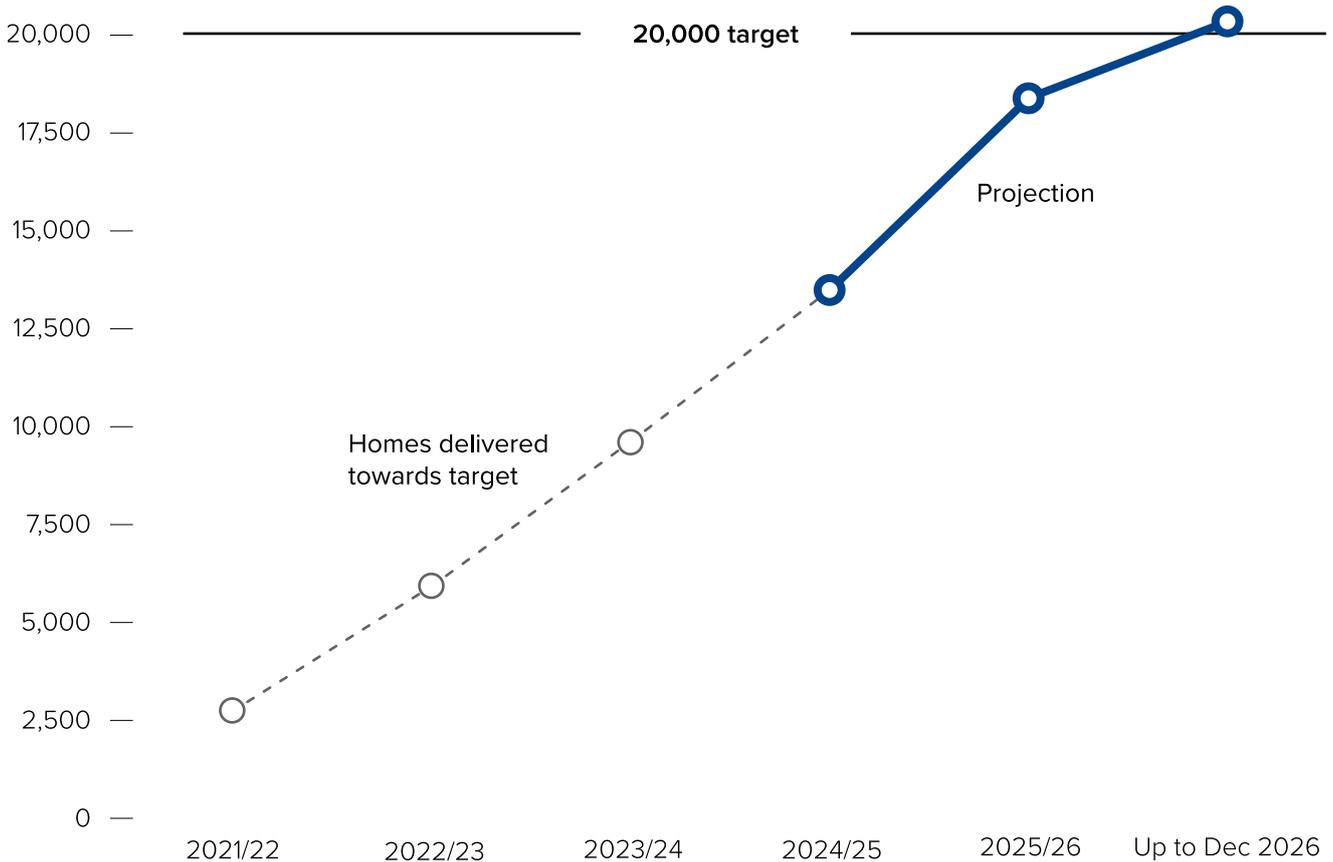
Prospects for 2025/26

13. Local authorities estimate that a further 4,202 affordable homes are planned for delivery during 2025/26, the final year of the target period.

14. The Welsh Government [management information](#) released for the first time alongside the affordable housing statistics² presents a more detailed picture and suggests further progress towards the target. A further 4,936 homes including voids are expected to be delivered in 2025/26, including 977 by the end of September 2025.

15. Delivery is projected to reach 18,652 homes (93 per cent of the target) by the end of April 2026. Cumulative delivery is expected to be 20,182 homes, exceeding the target, by November 2026, seven months after the end of the Senedd term.

Figure 2: Projected affordable housing by September 2027



Source: Stats.gov.wales affordable housing statistics and Welsh Government management information.

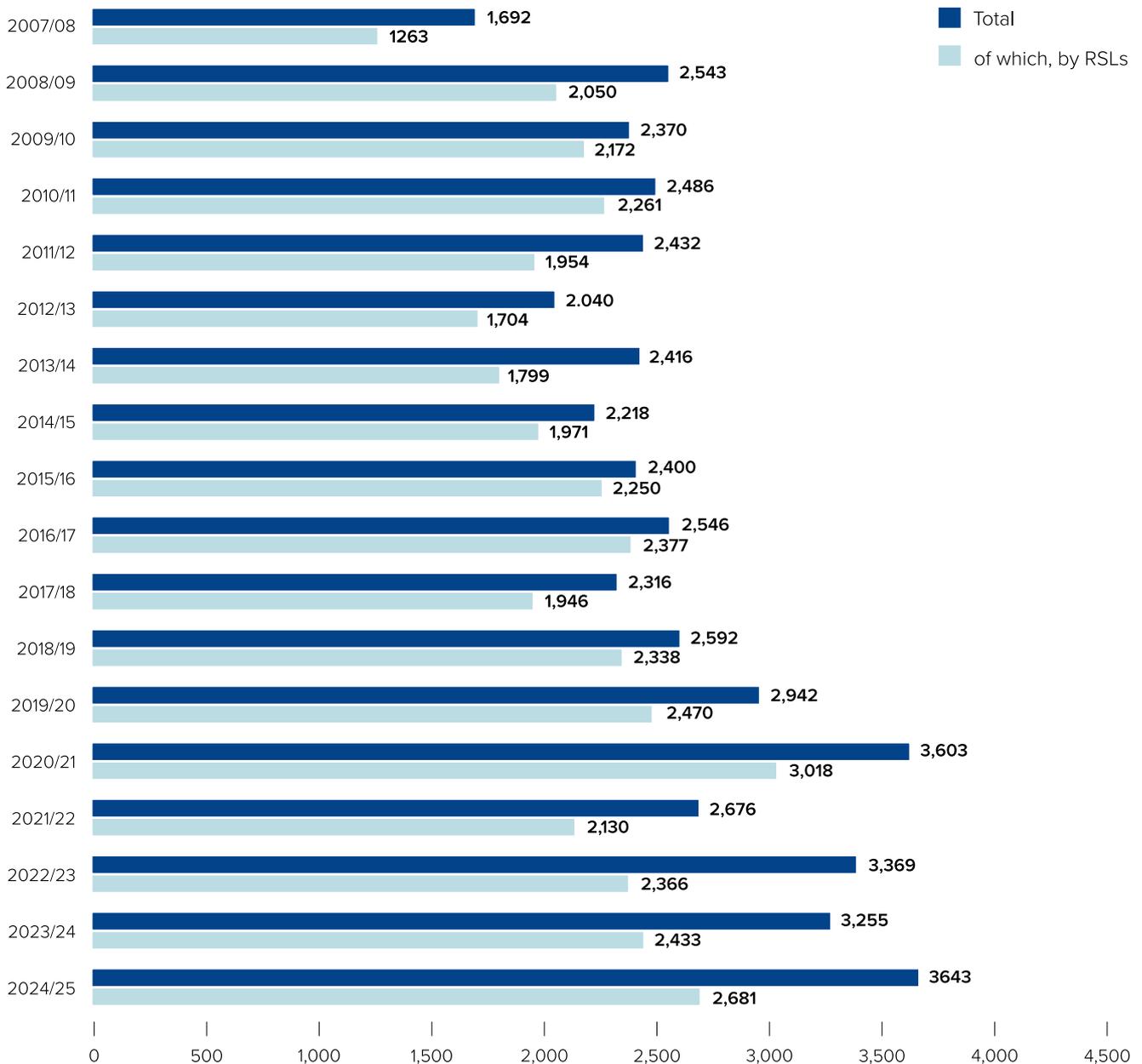
² The Welsh Government’s chief statistician outlines the strengths and weaknesses of the different data sources in a [blog](#).

Affordable housing delivery in 2024/25

16. Data on [additional affordable housing delivered](#) presents an alternative measure of provision. Note that this uses a slightly different definition of affordable housing to the one used for the Welsh Government's 20,000 target³.

17. This shows that 3,643 additional affordable homes were delivered in 2024/25, a 12 per cent increase on the previous year and the highest annual total since records began in 2007/08.

Figure 3: Additional affordable housing provision between 2007 to 2008 and 2024 to 2025



Source: Stats.gov.wales affordable housing statistics.

³ This definition is based on [Technical Advice Note \(TAN\) 2: planning and affordable housing](#). It includes shared equity affordable housing units (but not Help to Buy) and excludes long-term voids brought back into use and homes leased for more than a year, both of which are included in the 20,000 target.

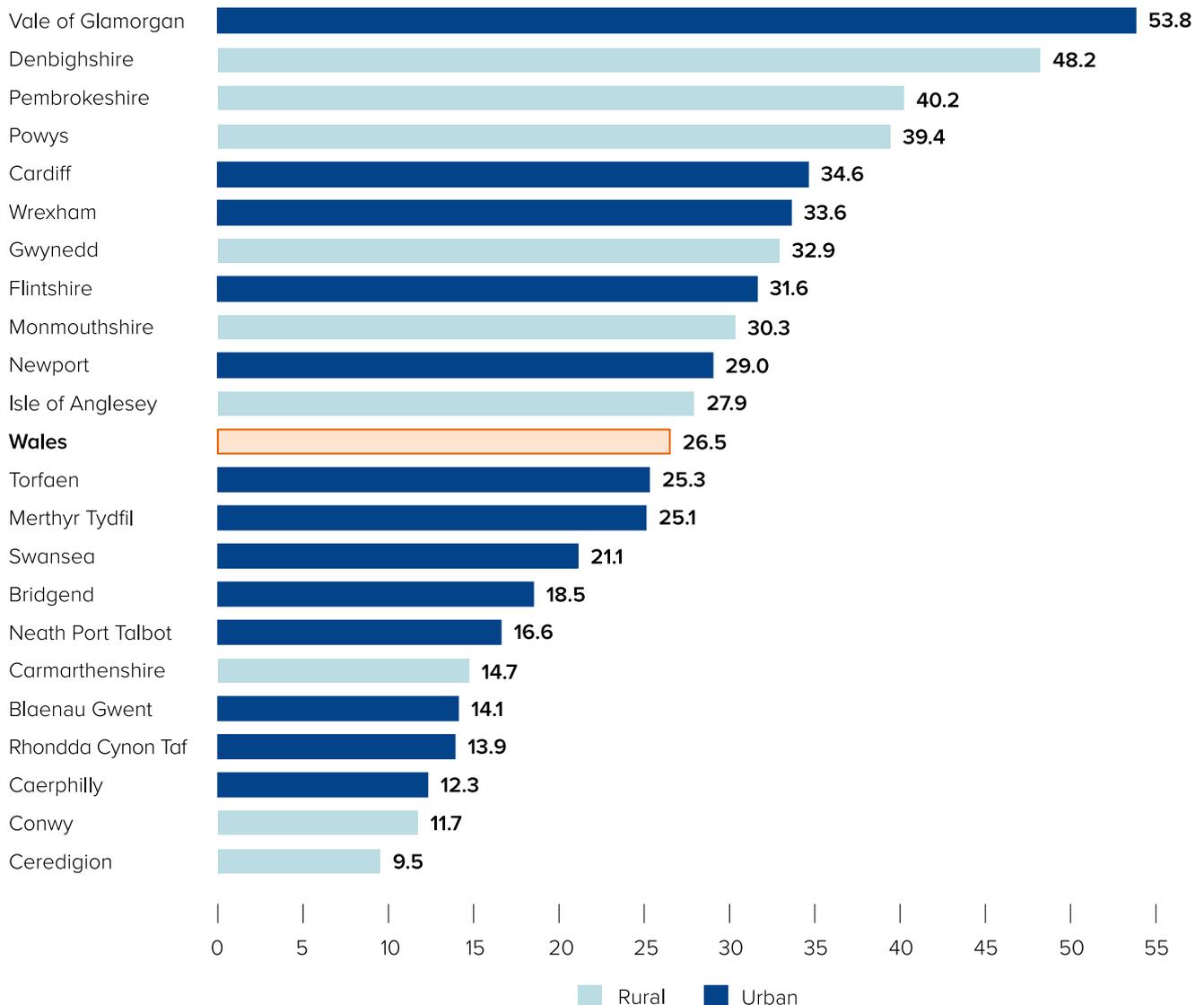
18. Of those the additional affordable homes in 2024/25:

- 76 per cent were new build
- 74 per cent were delivered by housing associations, 23 per cent by local authorities and 3 per cent by other providers including private developers
- 92 per cent were for rent (social and intermediate rent), with 5 per cent for shared ownership and 3 per cent for shared equity

- 79 per cent were delivered through capital grant funding.

19. Rates of delivery varied significantly between local authority areas. Adjusting for population, Vale of Glamorgan and Denbighshire had the highest rate of additional affordable homes delivered per 10,000 households and Ceredigion and Conwy had the lowest. The average delivery rate across Wales was 26.5 additional affordable homes per 10,000 households.

Figure 4: Rate of all additional affordable housing units delivered per 10,000 households, by local authority area, April 2024 to March 2025



Source: Stats.gov.wales affordable housing statistics.

20. On this measure, over the five years to 2023/24, delivery averaged 3,169 affordable homes per year. That was 9.5 per cent below the need for affordable homes identified in the national plan of 3,500 a year.

Overall supply

21. New house building statistics are seen by the Welsh Government as the main source of data on new housing supply. However, the data are subject to quality limitations and different datasets produce different assessments.

Housebuilding

22. Overall completions of new homes have fallen short of identified housing need in recent years, according to [new house building statistics](#)⁴. Over the five years from 2019/20 to 2023/24, completions totalled 26,482, an average of 5,296 per year, 28 per cent below the 7,400 a year requirement identified in the national plan.

23. There is an important caveat to add here, however. The starts and completions data are accredited statistics and are seen by the Welsh Government as the main source of information on new supply. They are based on reports by local authority building control and the National House Building Council. The data release acknowledges that they do not include information from other private approved inspectors ‘likely resulting in an undercount in the total number of new dwellings started and completed’.

24. Bearing that point in mind, the situation appeared to worsen in 2024/25, with just 4,631 new homes completed, which was only slightly higher than the recent low point of 2020/21 (4,616), when building was severely affected by the COVID-19 pandemic. The house building pipeline looked even gloomier, with starts falling 26 per cent to 3,798.

25. Completions were strongest in Monmouthshire, Newport and Vale of Glamorgan (which all reported seven or more completions per 1,000 existing dwellings) and weakest in Neath Port Talbot, Bridgend (estimated), Conwy, Isle of Anglesey and Carmarthenshire (which all reported fewer than two completions per 1,000 existing dwellings).

Dwelling stock estimates

26. House building completions are just one component of net housing supply. [Dwelling stock estimates](#) (of the number of homes in Wales) are adjusted for census data and subtract homes lost to demolitions (though there were only 106 of these in 2023/24) from new build completions so should be an indicator of net supply. However, they are subject to the same caveat as above.

Energy Performance Certificates

27. [Energy Performance Certificates \(EPCs\) for new domestic properties](#) provide an alternative indicator of housing supply, one that includes conversions and change of use as well as new housebuilding (but not demolitions). The data shows that the number of certificates for new domestic properties has run consistently ahead of building control-based completions over the last 10 years, in line with the undercount highlighted above.

28. Certificates for new homes averaged 8,000 a year between 2019/20 and 2023/24, exceeding estimates of housing need over that period. The 6,894 certificates for new homes issued in 2024/25 was down by 4 per cent on the previous year but exceeded housebuilding completions by 49 per cent.

⁴ Note that these statistics cover new housebuilding alone and, unlike the affordable housing supply statistics, do not include empty homes and voids brought back into use.

29. It is possible that there may be some double counting within the Energy Performance Certificates data, for example with certificates being issued at different stages of construction. However, The UK [Ministry for Housing, Communities and Local Government](#) says that multiple certificates have been removed from the data for certificates for new dwellings to provide de-duplicated figures.

Council tax stock of properties

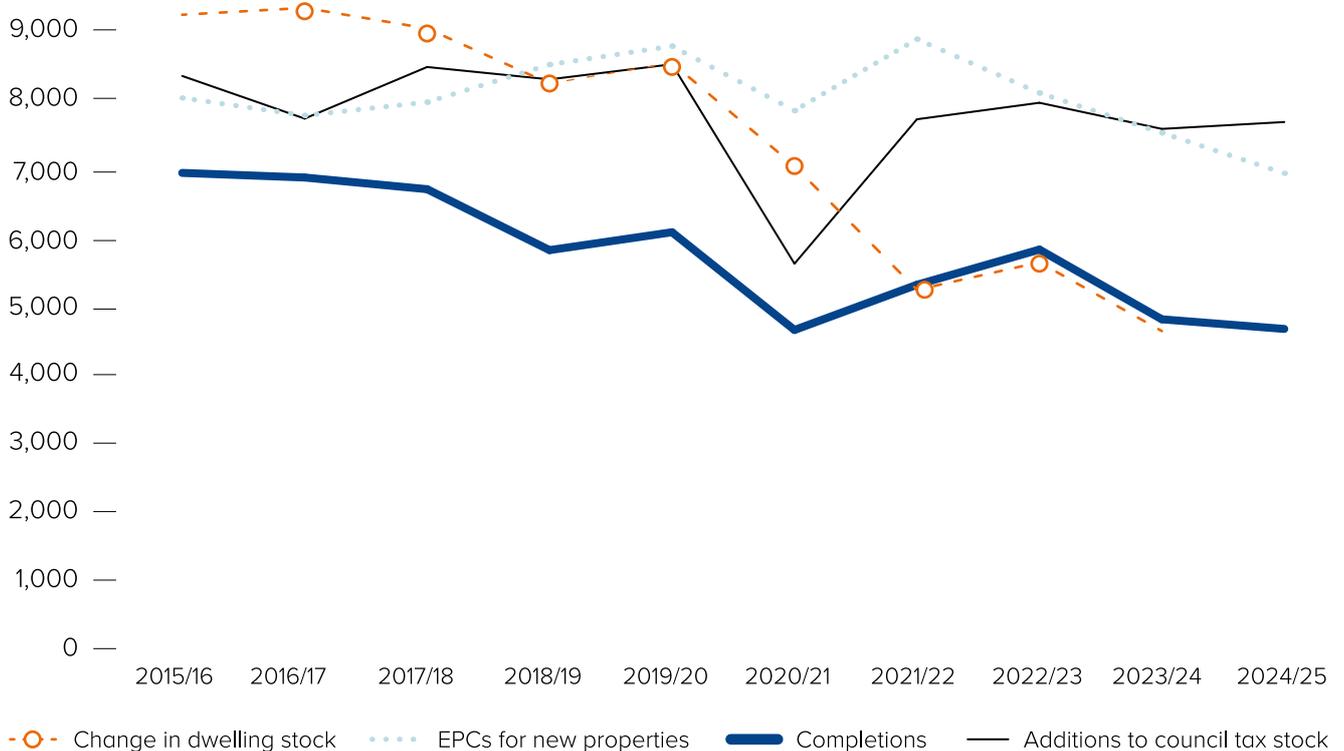
30. Another source of data on supply is the annual change in the Valuation Office Agency’s statistics on the [council tax stock of properties](#) in Wales. With a blip during the pandemic, this has tracked the number of energy performance certificates for new domestic properties over the last 10 years.

The data goes up to April 2025 and records an additional 7,640 properties in 2024/25, a little above the number of new energy performance certificates in the same year. The fact that two different measures of supply present similar results lend them added weight.

Comparing the different measures

31. The graph below shows the supply of additional homes per year in Wales drawn from these four different data sources. Supply as measured by the number of energy performance certificates for new homes and the change in the council tax stock of properties has run consistently higher than housebuilding completions and the change in the dwelling stock estimates.

Figure 5: Four measures of housing supply in Wales



Source: Stats.gov.wales housebuilding and dwelling stock statistics, Valuation Office Agency, Ministry for Housing, Communities and Local Government.

Evidence from England

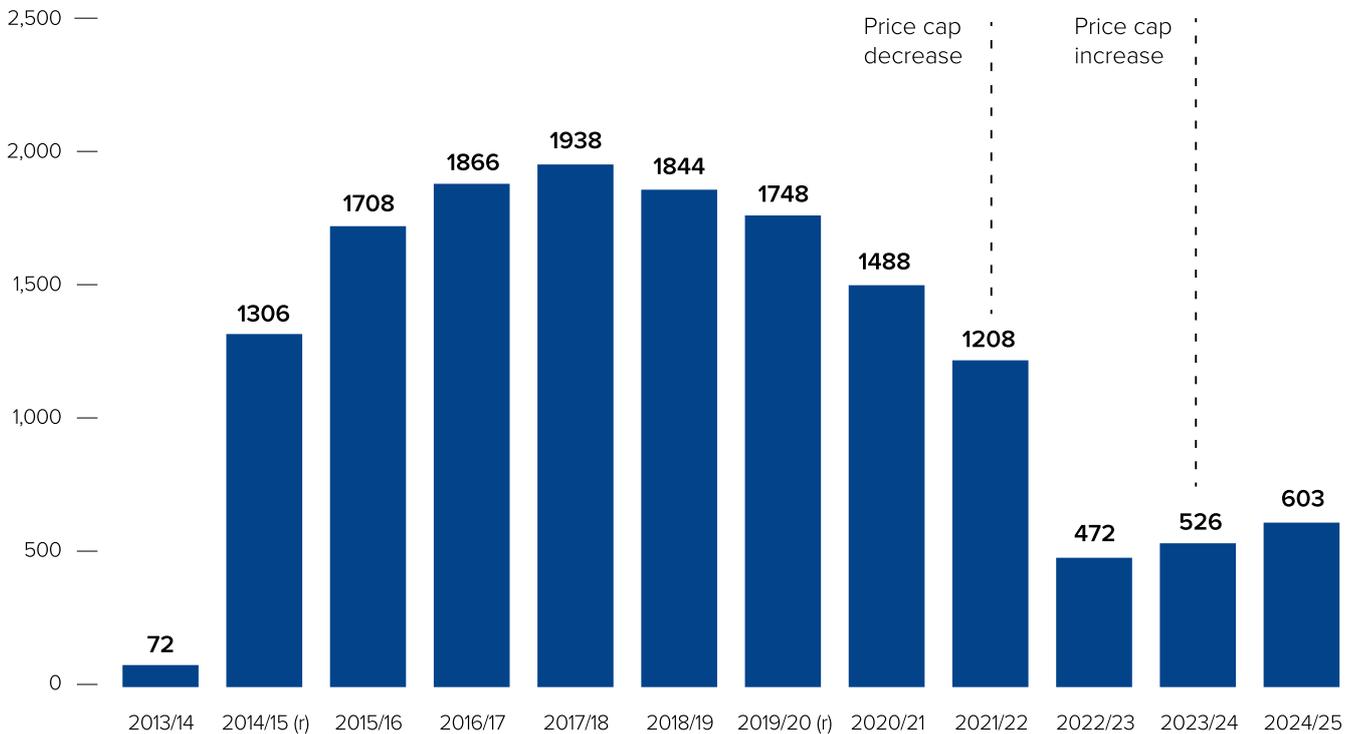
32. England has experienced similar difficulties in [measuring housing supply](#) and has developed data on net additional dwellings as a more accurate measure than building control-based starts and completions, which are estimated to cover around 80 per cent of housebuilding. Net additions include homes created through conversions and change of use (less demolitions) as well as more comprehensive data on new housebuilding. The data on energy performance certificates are now classified as official statistics and the number of certificates for new dwellings is treated as a leading indicator of gross housing supply (and of net additions once adjusted for demolitions).

Help to Buy

33. The [Help to Buy – Wales shared equity loan scheme](#) supported Welsh buyers to purchase 14,779 new-build homes between its inception in January 2014 and March 2025.

34. Help to Buy was originally a UK Government scheme, with different versions of it in the devolved nations. In 2025, Wales is the only UK nation where it continues to operate. The scheme offers 20 per cent equity loans to buyers with a 5 per cent deposit who purchase new homes from a participating builder. Most, but not all, purchasers are first-time buyers. The number of transactions fell after the maximum purchase price was reduced from £300,000 to £250,000 in April 2021. This was restored to £300,000 in April 2023 for homes with an energy efficiency rating of EPC B or above.

Figure 6: Annual completed purchases using Help to Buy – Wales equity loan scheme



Source: Stats.gov.wales Help to Buy – Wales statistics

35. The decline in purchases of homes via Help to Buy since 2020/21 matches the fall in new build completions over the same period and followed the reduction in the price cap. However, there were 603 Help to Buy purchases in 2024/25, an increase of 15 per cent over 2023/24.

Existing homes – Housing market transactions

36. Turning to the total supply of homes (new and existing) in the private market, residential transactions totalled 50,100 in 2024/25, according to [Land Transactions Tax](#) (LTT) statistics. This was a 14 per cent increase on the previous year but around 10 per cent lower than before the pandemic.

37. Looking further back, before stamp duty was devolved to Wales and LTT was established, [HM Revenue and Customs](#) statistics show that transactions peaked at 72,290 in 2006/07 but fell to below 40,000 a year in the aftermath of the financial crisis.

38. Introduced in April 2018, LTT is a tax on the purchase or lease of land and buildings that is primarily intended to raise revenues for spending on the delivery of public services in Wales. LTT, and its associated rates and bands, is kept under review to ensure it meets the Welsh Government's policy aims and generates revenue for public services. It can also potentially support other policy aims through, for example, reliefs or adjustments to the rates charged.

39. LTT brings significant revenue to the Welsh Government and generated £341 million in 2024/25. This includes revenue from the main residential tax rates, higher residential tax rates and non-residential tax rates⁵. The residential tax rates (main and higher residential tax rates) contributed £252 million in 2024/25.

40. On introduction, LTT was not paid by most homebuyers buying homes costing £180,000 or less (that is those paying the main residential rates). In October 2022, that starting threshold was raised so that no tax was paid on homes costing £225,000 or less, reflecting the increase in prices since 2018 and meaning that around 60 per cent of all homebuyers pay no tax.

41. There is no first-time buyers' relief in LTT. As LTT has a higher starting threshold compared to England, where stamp duty land tax is paid, this means most first-time buyers in Wales do not pay tax.

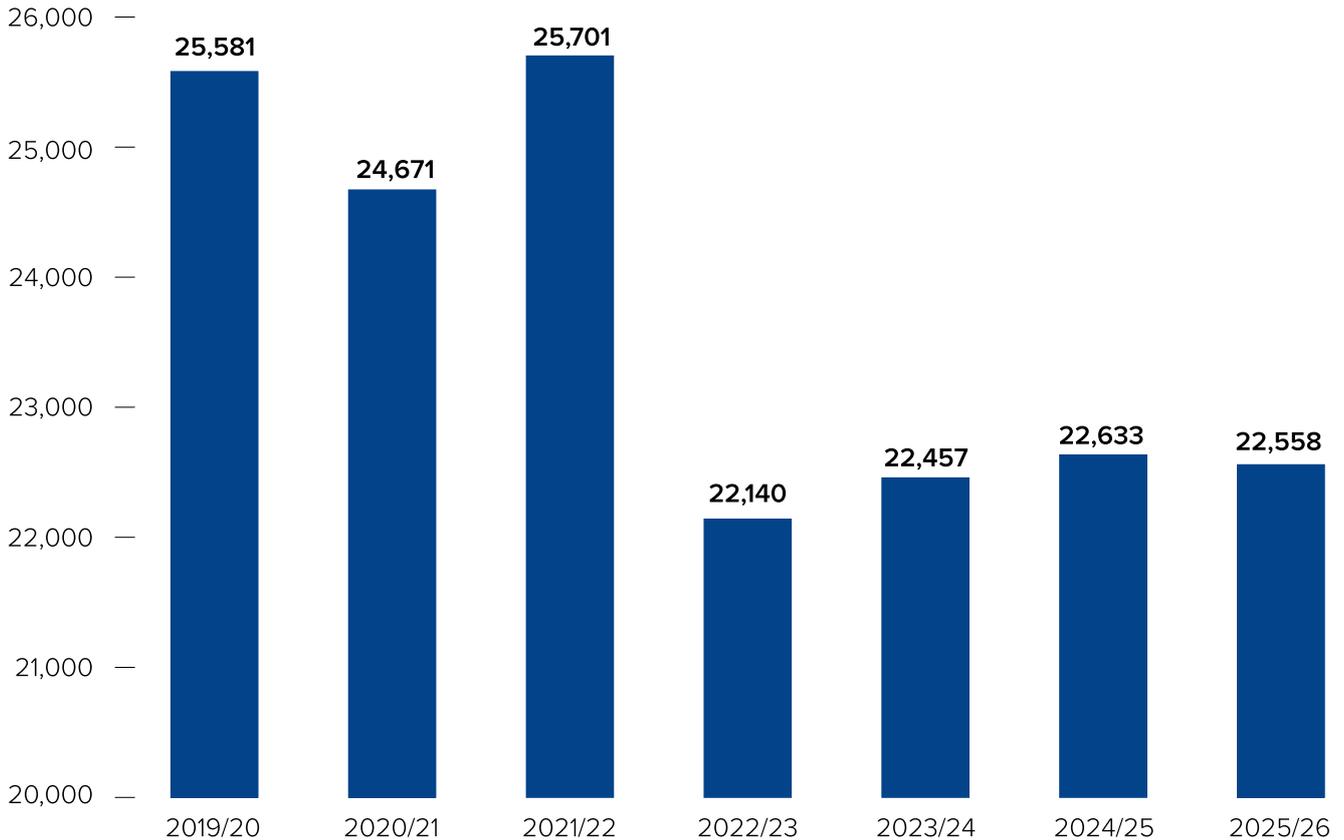
42. The higher residential rates of LTT are paid by those who already own an interest in another residential property (anywhere in the world). It is most commonly paid on transactions involving a buy to let property, a second home, a holiday let or a property for some other purpose (including providing a home for a relative). It is also payable on bridging transactions where a repayment is possible if the former main residence is sold within three years of purchase of the new main residence.

Empty homes

43. Council tax data show that local authorities estimated there were 22,558 [chargeable empty properties](#) in Wales in 2025/26. This was down slightly on 2024/25 (22,634) and represents a fall of 12 per cent over the last six years (25,581 in 2019/20). The highest numbers of empty homes in 2025/26 were recorded in Carmarthenshire (2,090) and Rhondda Cynon Taf (2,042), although the numbers have fallen in both areas since 2019/20.

⁵ [Land Transaction Tax rates and bands | GOV.WALES](#)

Figure 7: Total number of chargeable empty properties in Wales



Source: Stats.gov.wales chargeable empty and second homes statistics.

Social housing lettings

44. There were 12,887 [new lettings by social landlords](#) in 2023/24, down 5 per cent on the previous year and the lowest annual total for 20 years. Of those, 6,737 were to households rehoused from the waiting list (the lowest since this data series began in 1996/97) and 6,150 were to those rehoused on a priority basis due to homelessness (the highest on record) in line with Welsh Government policy on supporting

people in temporary accommodation into homes. These figures do not include 4,352 transfers and exchanges completed in 2023/24, up slightly on the previous year.

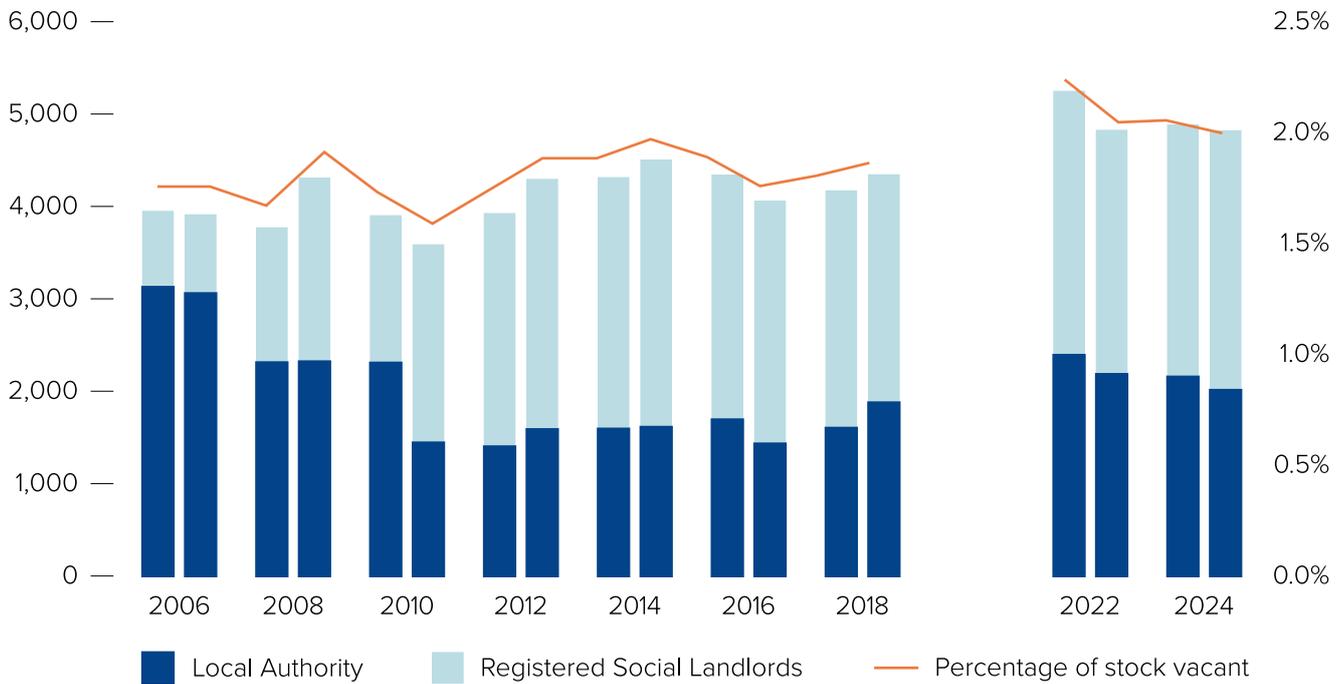
45. Local authorities made slightly more new lettings to homeless households (2,437 in 2023/24) than to those housed from the waiting list (2,131), whereas registered social landlords made more lettings to those on the waiting list (4,606) than to homeless households (3,713).

Vacant social homes

46. There were 4,819 [social housing vacancies](#) in 2023/24, 2,011 of them owned by local authorities and 2,808 by Registered Social Landlords (RSLs). This represented around 2 per cent of social homes. Of these 1,725 had been vacant for six months or more, including

399 that were available for letting and 1,326 that were not available. The remaining 3,094 had been vacant for less than six months, with 1,355 available for letting and 1,739 not available. The total number of vacant social homes was marginally lower than in 2022/23 but should start to fall due to funding to bring long-term voids back into use (see paragraph 11).

Figure 8: Social landlord vacancies as of 31 March annually



Source: stats.gov.wales social housing vacancies, lettings and arrears statistics.

CHAPTER 2

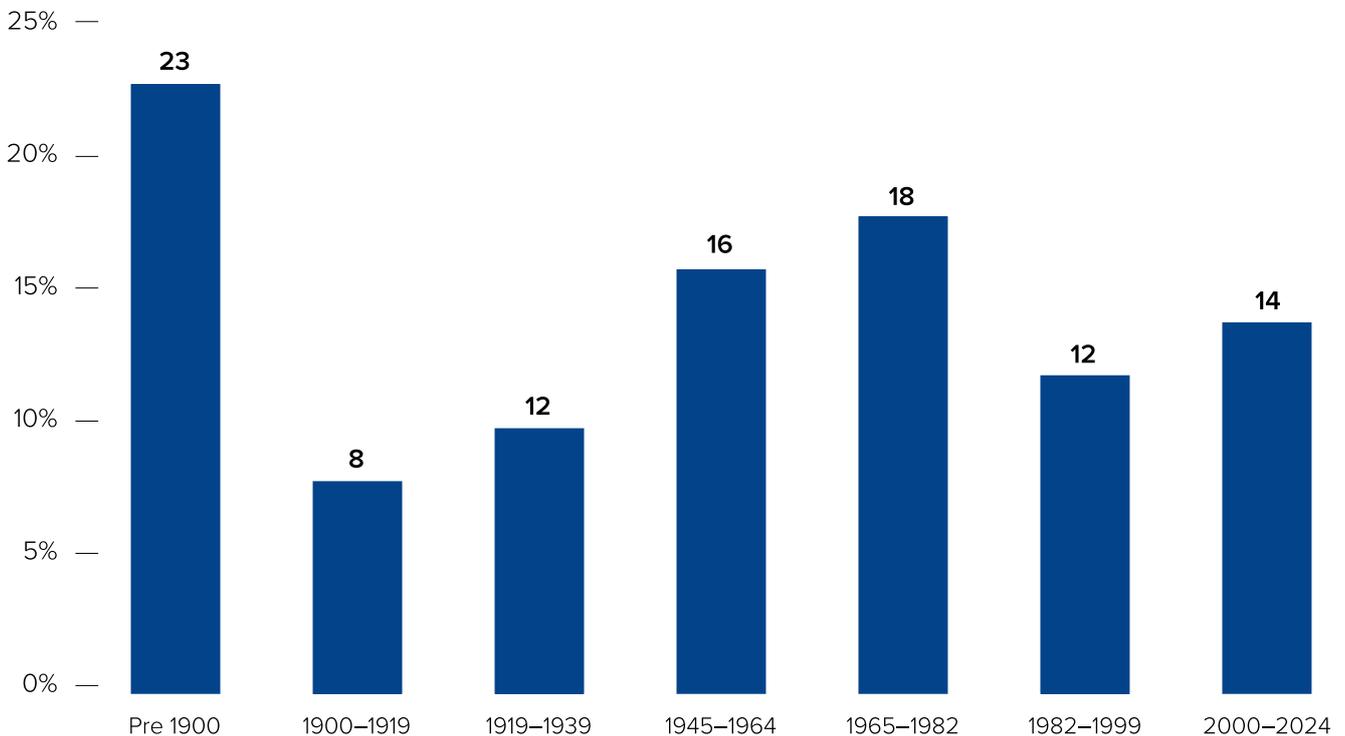
Quality and standards

Introduction

47. The UK has the oldest housing stock in Europe and Wales has the oldest housing stock within the UK.

48. Of the almost 1.5 million homes in Wales in 2024, 334,000 were built before 1900, 114,000 between 1900 and 1918 and 142,000 between 1919 and 1939. By contrast just 214,000 have been built in the 21st century.

Figure 9: Age of Welsh housing stock by period of construction



Source: [Valuation Office Agency, Table CTSOP4.0: Number of properties by Council Tax band, property build period and administrative area, England and Wales, 2024.](#)

49. The quality and standards of the existing housing stock are therefore key issues for Wales. While the age of the house does not always correlate with its quality – for example, well-maintained older properties can manage changes in temperature better than recent new-builds – in general, the older the home, the more likely it is to be less energy efficient and of an inadequate standard. Poor housing conditions can in turn have a direct impact on the health and finances of owners and tenants. Within Wales, the proportion of homes built before 1919 was highest in Rhondda Cynon Taf (49.7 per cent) followed by Blaenau Gwent (46.2 per cent), Gwynedd (46.2 per cent) and Ceredigion (42.9 per cent).

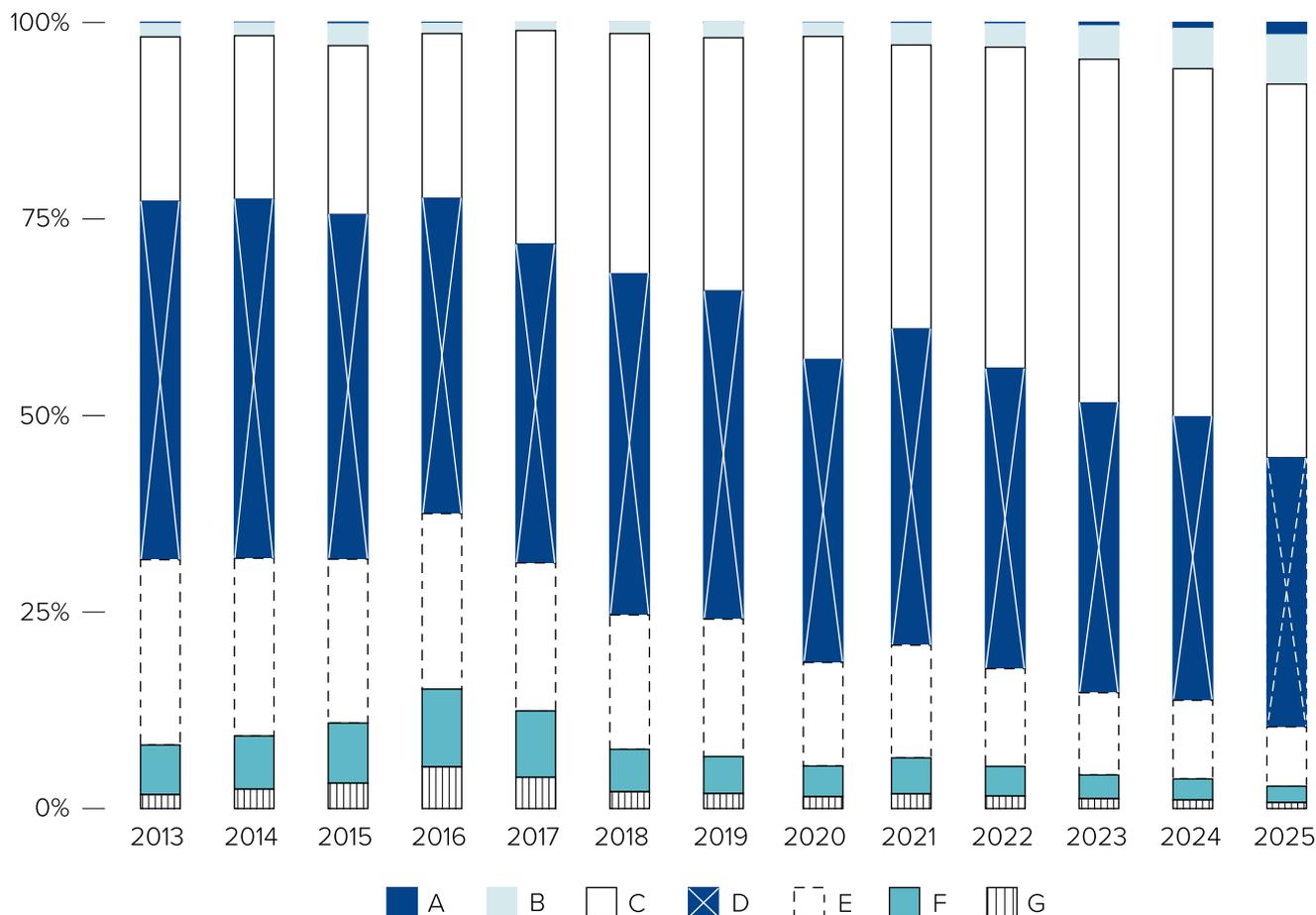
50. Social landlords are currently working to comply with the Welsh Housing Quality Standard 2023. Initial data on this has been made available in 2026 and can be viewed at www.gov.wales/

[welsh-housing-quality-standard-31-march-2025-official-statistics-development.html](#) The Welsh Housing Conditions Survey of homes across tenures was last published for 2017/2018 but the Welsh Government has recently approved plans for a [Welsh Housing Survey](#) to be launched in 2027/28. This chapter presents a broad picture of the data currently available.

Housing conditions – Energy efficiency

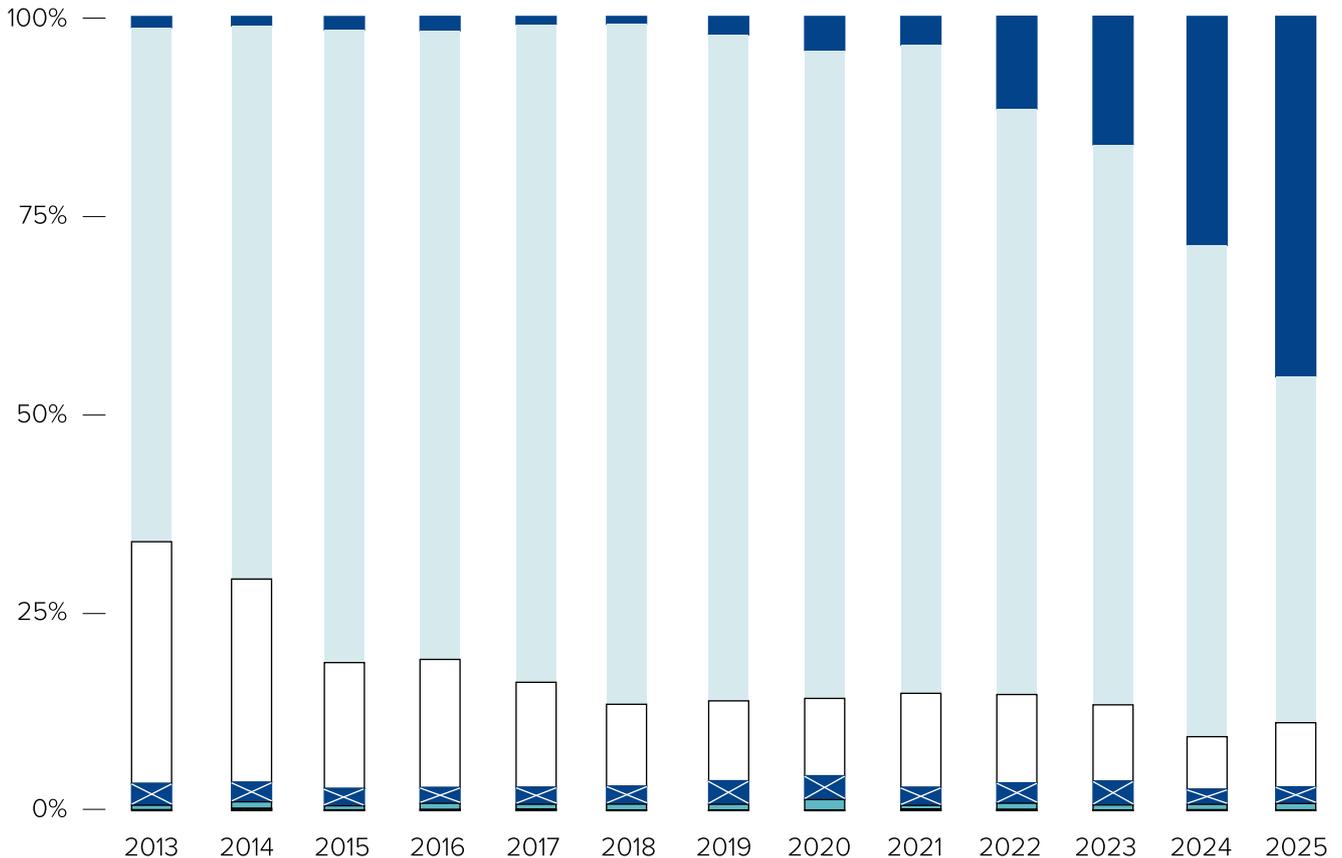
51. [Energy efficiency ratings](#) for homes in Wales have improved significantly since 2013. In the year to March 2024, for the first time, most Energy Performance Certificates (EPCs) issued for existing homes were rated in the more efficient A–C categories. Meanwhile, around half of the new homes rated in 2024/25 were the most energy efficient EPC A.

Figure 10: Energy efficiency ratings (EER) existing domestic dwellings, Wales – January to March 2025



Source: Live tables EB1 and NB1.

Figure 11: Energy efficiency ratings (EER) new domestic dwellings, Wales – January to March 2025



Source: Live tables EB1 and NB1.

52. It is important, however, to note that less than half (44 per cent) of homes in Wales are currently covered by a valid certificate issued within the last 10 years. [Welsh Government analysis](#) indicates that coverage varies by type of home (57 per cent of flats have a valid certificate compared to 44 per cent of houses) while [ONS analysis](#) of EPC and Census 2021 data highlights variation by tenure (64 per cent of privately rented homes have a valid certificate against 40 per cent of owner-occupied homes).

53. The percentage of dwellings with adequate energy performance is one of the Wellbeing of Wales: national indicators. This is defined as the percentage with a Standard Assessment Procedure (SAP) score of 65 or above (the equivalent of EPC D or above).

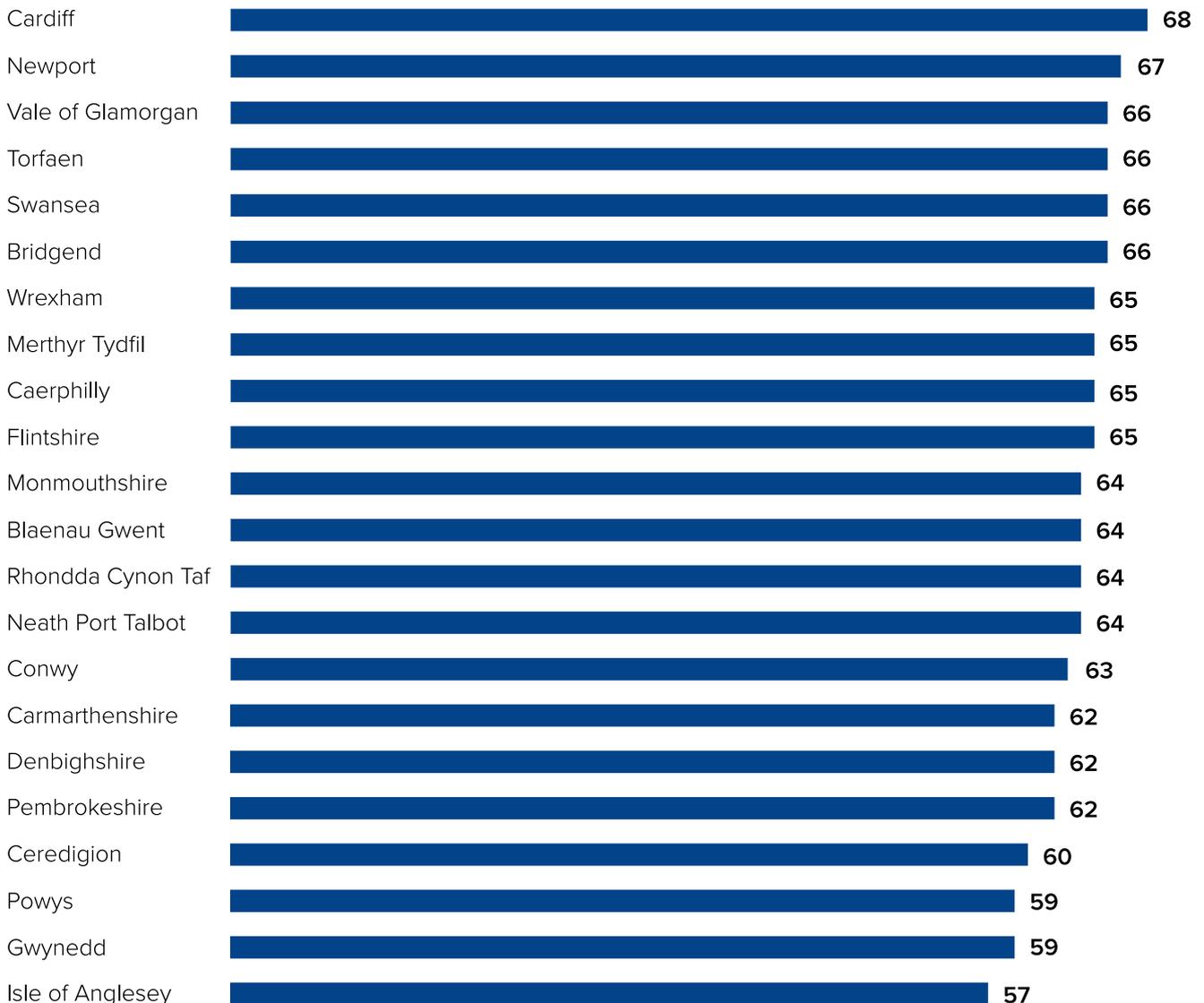
54. Homes in Wales had a median score of 67, according to [ONS analysis](#) of records from the ten years up to March 2024 (although this does not include homes without a certificate). New dwellings had a median EPC score of 84 in the five years to 2024, compared to 81 in the five years to 2013.

55. In general, [the older the home the less energy efficient it will be](#). Homes built before 1929 in Wales had a median energy efficiency score of 59 (EPC D), compared to 66 for those built between 1930 and 1962 (D), 72 for those built between 1983 and 2011 (C) and 84 (B) for those built since 2012.

56. Comparing different tenures in the year to March 2024, existing social rented homes are generally more energy efficient (median energy efficiency score 70) than owner-occupied (63) and private rented homes (65). New social rented and owner-occupied homes had a higher rating (84) than new private rented homes (79).

57. Minimum Energy Efficiency Standards (MEES), unless an exemption is granted, make it unlawful to let out a privately rented property with an EPC rating below E. This is set to be tightened to a minimum of C by 2030. Data on privately rented properties registered with [Rent Smart Wales](#) shows that as at the end of June 2025, there were 2,946 (1.6 per cent) rated G or F and 107,991 (58.4 per cent) rated E or D.

Figure 12: Local authority average domestic energy efficiency ratings in the private rented sector excluding exempted dwellings



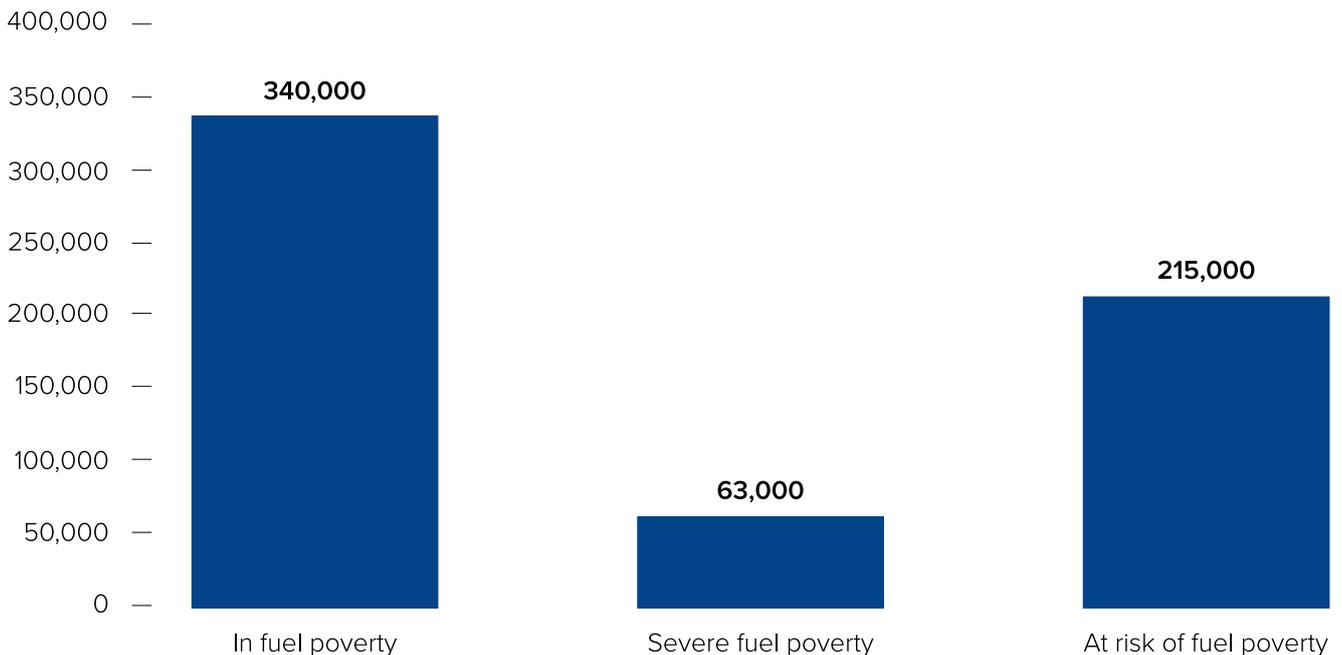
Source: [Rent Smart Wales](#).

Fuel poverty

58. One in four households in Wales (25 per cent) were estimated to [be living in fuel poverty](#) as at October 2024. Fuel poverty is defined as being unable to keep a home warm at a reasonable cost. In Wales, this means households spending more than 10 per cent of income on maintaining

a satisfactory heating regime. Meanwhile, five per cent of households were in severe fuel poverty (spending more than 20 per cent of their income) and a further 16 per cent were at risk of fuel poverty (8 to 10 per cent)⁶.

Figure 13: Welsh homes estimated to be in fuel poverty, severe fuel poverty or at risk of fuel poverty as of October 2024



Source: Building Research Establishment fuel poverty projections 2025.

Housing hazards

59. [The percentage of dwellings free from Category 1 hazards](#) is one of the Wellbeing of Wales: national indicators. The latest available data shows that this applied to 82 per cent of homes in Wales in 2017/18.

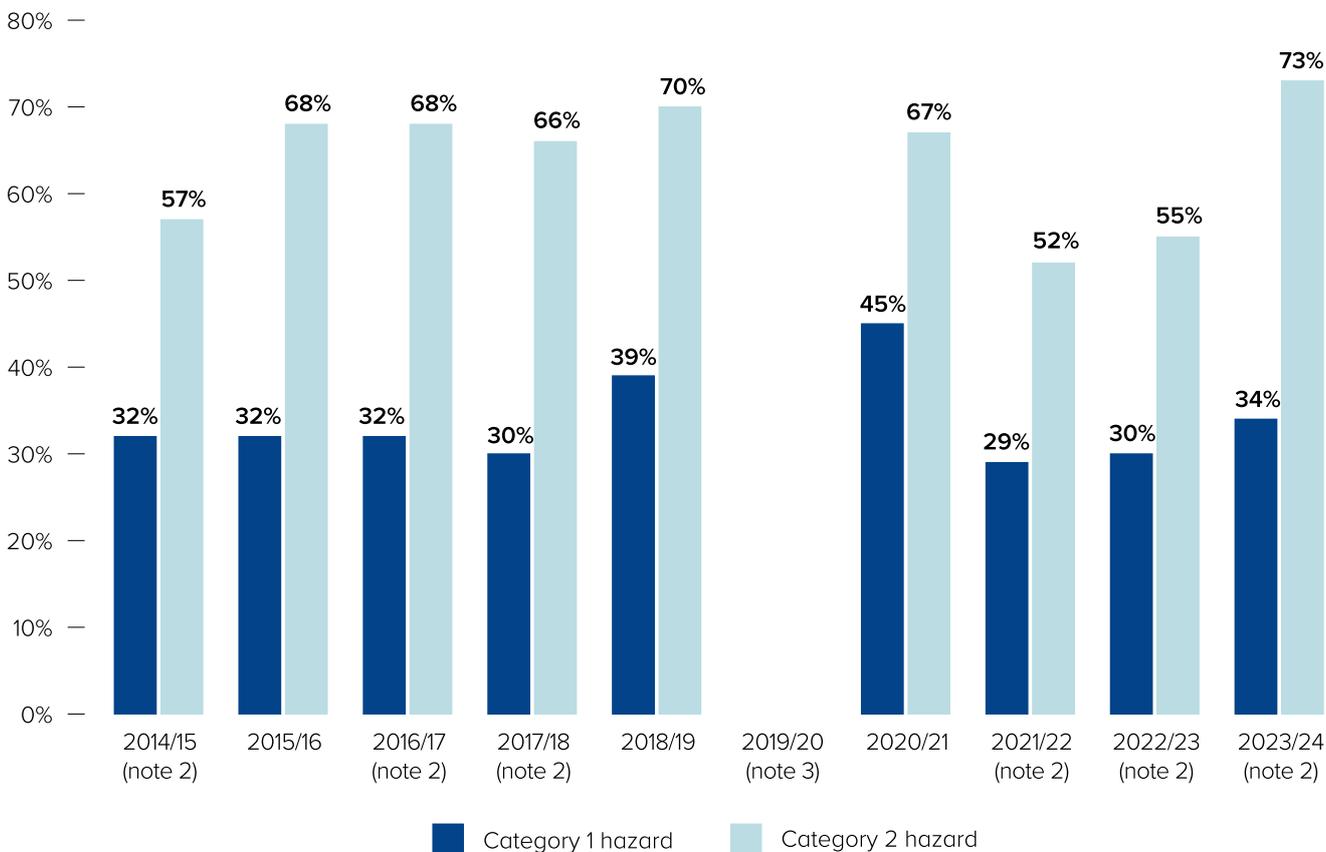
60. Modelling for the [Welsh Index of Multiple Deprivation](#) estimated that Welsh homes had an 18 per cent likelihood of containing a serious hazard, 20 per cent of being of poor quality and 3 per cent of being in disrepair. Work is currently being undertaken to update this modelling and will likely be available by end of 2025/26.

⁶ The figures come from modelled estimates commissioned from the Building Research Establishment by the Welsh Government as part of the periodic review of its plan to tackle fuel poverty. They are not strictly comparable with previous estimates.

61. A total of 4,821 [Housing Health and Safety Rating System \(HHSRS\) assessments](#) were carried out in 2023/24, 6 per cent fewer than the previous year. Half were on Houses in Multiple Occupation (HMOs) and half on non-HMOs.

62. Category 1 hazards (the most serious) were found in 1,659 assessments (34 per cent). The most common of these was ‘excess cold’, followed by ‘damp and mould growth’, ‘fire’ and ‘electrical’. Action by local authorities resulted in the resolution of 985 Category 1 Hazards (59 per cent).⁷

Figure 14: Percentage of assessments found to contain at least one Category one hazard by dwelling type, between 2014 to 2015 and 2023 to 2024



Source: stats.gov.wales housing hazards statistics. Notes 1: Assessments may contain both Category 1 and Category 2 hazards. 2: Includes estimated figures for some local authorities. 3: Data not collected for 2019 to 2020 due to the impact of the COVID-19 pandemic.

63. The highest number of assessments was carried out in Cardiff (1,404) and Swansea (620). By contrast, fewer than 100 assessments were carried out in nine of 22 local authorities (Blaenau Gwent, Bridgend, Carmarthenshire, Flintshire, Merthyr Tydfil, Monmouthshire, Torfaen, Wrexham and Vale of Glamorgan).

64. It is important to note that this information is not likely to be representative of the whole housing stock. Assessments are only undertaken for a particular reason (for example, because a tenant has made a complaint about the safety of their accommodation) and are largely carried out in the private rented sector.

⁷ Note that it is not possible to determine the percentage of hazards that have been resolved within a given year (a hazard can be identified in one year and resolved the following year).

Welsh Housing Quality Standard

65. Welsh social landlords are currently working to meet the Welsh Housing Quality Standard 2023, with the first data on this published on 26 February 2026, which can be accessed at www.gov.wales/welsh-housing-quality-standard-31-march-2025-official-statistics-development-html. The Welsh Government administers [two funds](#) to help housing associations and local authorities improve the quality of their housing stock.

66. The Major Repairs Allowance is paid to the 11 local authorities who continue to manage and maintain social housing. Funding for 2025/26 is as follows:

Caerphilly	£7,300,000
Cardiff	£9,570,000
Carmarthenshire	£6,200,000
Denbighshire	£2,370,000
Flintshire	£4,980,000
Isle of Anglesey	£2,690,000
Pembrokeshire	£4,000,000
Powys	£3,720,000
Swansea	£9,280,000
Vale of Glamorgan	£2,770,000
Wrexham	£7,520,000

67. Dowry gap funding is paid to 10 housing associations that were formed when local authorities transferred their housing stock. In 2025/26 this was distributed as follows:

Trivallis (formerly RCT Homes)	£7,300,000
Newport City Homes	£6,500,000
Tai Tarian (formerly NPT Homes)	£6,200,000
Bron Afon Community Housing	£5,800,000
Tai Calon	£4,200,000
Adra (formerly Cartrefi Cymunedol Gwynedd)	£4,100,000
Merthyr Valleys Homes	£2,900,000
Cartrefi Conwy	£2,600,000
Monmouthshire Housing Association	£2,600,000
Barcud	£1,600,000

Decarbonisation and net zero

68. Two energy efficiency schemes operated by the UK Government apply to Wales: the Energy Company Obligation⁸ and the Great British Insulation Scheme⁹.

69. [UK Government data](#) shows that under the former, up to the end of December 2024, 258,800 measures were in Wales, representing 6 per cent of the UK total. Under the latter, 3,600 measures were in Wales (also 6 per cent of the UK total). Rural areas in Wales benefitted from higher proportions of both schemes than in Scotland or England.

⁸ The Energy Company Obligation is funded by energy suppliers and helps lower-income households improve their energy efficiency. It is currently in its fourth iteration (ECO4), ending in March 2026. The UK Government announced abolishing the ECO scheme in the UK Budget 2025.

⁹ The Great British Insulation Scheme funds free or cheaper insulation with broader eligibility criteria than ECO4 and runs until March 2026.

70. As at the end of December 2024, Wales (75 per cent) had a higher share of insulated cavity wall homes than England and the same levels of loft insulation (65 per cent). Most of these were newer homes built between 2013 and 2024. Wales had slightly lower levels of solid wall insulation (8 per cent).

71. The Welsh Government’s [Optimised Retrofit Programme](#) is open to social landlords to install a variety of home decarbonisation measures in the existing social housing stock. The programme is intended to support the Welsh Housing Quality Standard 2023.

Building safety

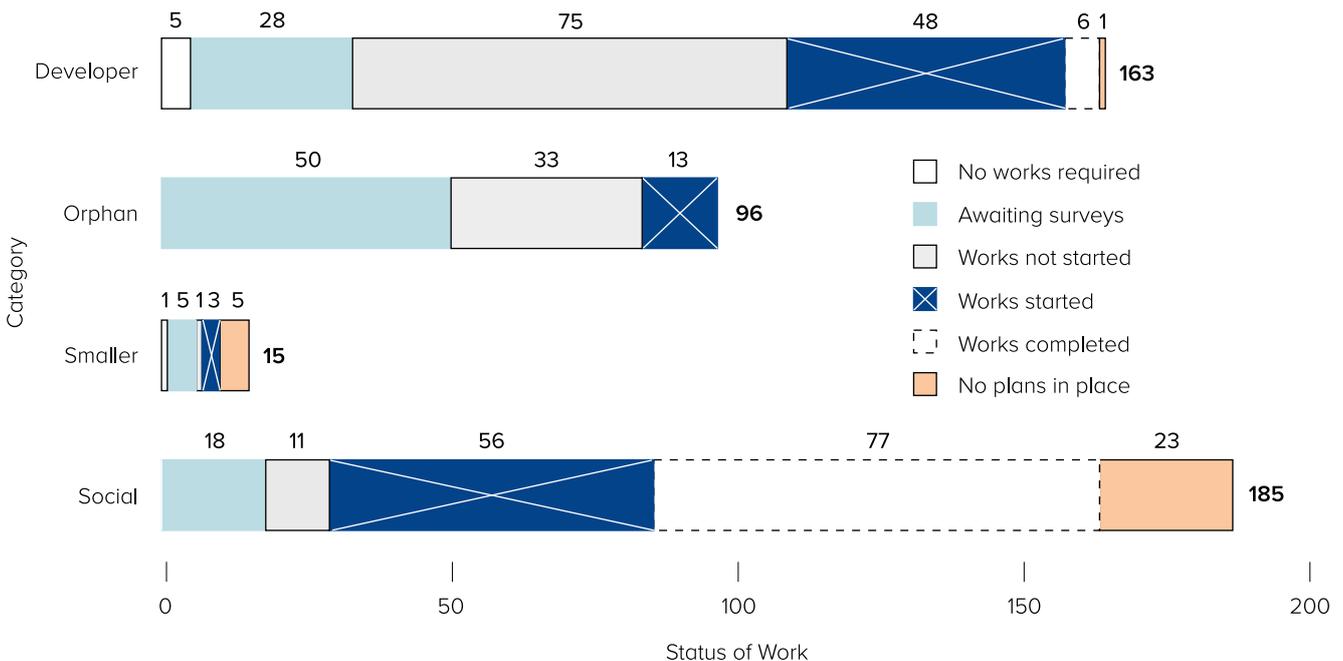
72. The impact of the Grenfell Tower fire in which 72 people died in 2017 continues to be felt by leaseholders and residents of medium and high-rise dwellings in Wales. In response the Welsh Government launched the Welsh Building Safety Programme focussed both on the remediation of internal and external fire safety issues in residential buildings of 11m

and over along with a programme of reform. The Welsh Government introduced the Building Safety (Wales) Bill to the Senedd in July 2025.

73. By September 2025, the [Welsh Building Safety Programme](#) had identified 459 buildings 11m and over; 274 in the private tenure and 185 in the social sector. Works were either complete or underway on 44 per cent and in the planning stages on 47 per cent, with a further 9 per cent either not requiring works or with remediation needs yet to be identified.

74. A dozen major developers have signed the Welsh Government developer contract while the Welsh Building Safety Fund is grant funding the remediation within the social sector and so-called ‘orphan’ buildings where the developer cannot be identified. There is therefore a route to remediation for all buildings of 11m and over in Wales. However, whilst it’s clear that progress being made, the pace has been criticised. This seems to be a common problem across all strands of the programme.

Figure 15: Progress of remediation work in the different categories of building as of September 2025



Source: Welsh Government Building Safety Programme.

Housing Improvement and Disabled Facilities Grants

75. Overall expenditure on [assistance for housing improvement](#) was £56.5 million in 2023/24. After an underspend during the pandemic, and recent increases in costs and demand, this was the highest amount recorded.

76. Mandatory Disabled Facilities Grants (DFGs) accounted for £44.3 million (78.3 per cent) of this total expenditure, with 7,083 homes improved. Average spending per mandatory Disabled Facilities Grant was £9,600.

77. Funding of £8.8 million was spent on housing improvement excluding Disabled Facilities Grants through local authority grants, loans, third-party assistance and resident contributions. Average spending was £2,500 per home, which is consistent with the last 10 years.

78. For those homes where tenure could be identified, most (2,045) were owner-occupied with smaller numbers being social rented (673) and private rented (63). Two thirds of the homes improved were in three local authority areas: Wrexham (1,073), Gwynedd (874) and Rhondda Cynon Taf (452).

79. Spending on area-based renewal schemes, which enable local authorities to focus investment on an area with social and environmental problems and poor housing, declined from £33.6 million in 2012/13 to just £2,000 in 2023/24 because the Welsh Government has increasingly prioritised individual-focused assistance.

CHAPTER 3

Affordability

Introduction

80. Seen from the outside, homes in Wales look relatively affordable. The average private rent is the lowest of the four UK nations and is only lower in one English region, the North East. The average house price in Wales is slightly higher than in Scotland and Northern Ireland, but markedly lower than in England, with prices lower in only two English regions, Yorkshire and the Humber and the North East.

81. Seen from within Wales, though, affordability pressures are acute. Wales has experienced the fastest increase in private rents of any UK nation since the start of 2023 and average rents in three areas of Wales are now beyond the commonly used affordability threshold of 30 per cent of median incomes. The average house price in Wales represents almost six times average earnings. See paragraphs 94-96 and 103-105 for a full discussion of private rental and house price affordability.

82. At the same time, support from housing benefit and the housing costs element of universal credit is under severe pressure, as discussed in paragraphs 110-113. Private renters across the UK have experienced shortfalls between their rent and their Local Housing Allowance (LHA) because of repeated freezes in rates but a higher percentage of Welsh renters have faced shortfalls than in any of the other UK nations.

83. Action to alleviate the affordability pressures caused by second homes and holiday lets in parts of Wales is discussed later in this chapter.

Rents and house prices

Private rents

84. Wales had the lowest average private rents of the four UK nations in September 2025, according to the [ONS Price Index of Private Rents](#). Average rents were £815 in Wales, compared to £1,410 in England, £1,004 in Scotland, and £865 in Northern Ireland¹⁰.

85. Welsh tenants, however, have faced some of the biggest rent increases in the UK recently. Average monthly rents in Wales increased at 7.1 per cent in the 12 months to September, compared with 5.5 per cent in England, 3.4 per cent in Scotland and 7.1 per cent in Northern Ireland. To put this into perspective, [Consumer Price Inflation](#) rose by 3.8 per cent over the same period, while [average earnings](#) (excluding bonuses) rose by 4.6 per cent in the year to July – September 2025.

86. Wales has also seen the greatest increase in rents since the start of 2023. With January 2023 set as 100 in the index, rents in Wales had risen to 123.7 by September 2025 compared to 122.1 in Northern Ireland, 120.9 in England and 119.0 in Scotland.

¹⁰ These figures are subject to the caveat that the Price Index of Private Rents data are official statistics in development by the ONS. In addition, the indices for Northern Ireland and Scotland reflect rents for advertised new lets, which will tend to be higher than rents across all properties, whereas the figures for England and Wales reflect achieved rents for both new and existing lets. Data for Northern Ireland are for July 2025.

87. Analysis of the data within Wales shows considerable variation both in monthly rents and the scale of rent increases. The highest average monthly rents in September 2025 were in Cardiff (£1,143), Monmouthshire (£974) and Vale of Glamorgan (£961). The lowest were in Powys (£574), Blaenau Gwent (£644) and Carmarthenshire (£648).

88. A more varied picture emerges when we look at increases in average rents broken down by local area. Over the last year, renters in Newport (19.5 per cent), Rhondda Cynon Taf (12.5 per cent) and Merthyr Tydfil (12.1 per cent) have seen the biggest rent rises but increases have generally been significantly lower in areas of North Wales, with renters in Gwynedd seeing a small fall (-0.5 per cent).

89. Looking at the index of rents with January 2023 set as 100, the biggest increases have been experienced in Rhondda Cynon Taf (131.0), Cardiff and Merthyr Tydfil (both 130.2). Gwynedd (112.2), Powys (112.7) and Isle of Anglesey (115.6) have seen the smallest increases.

90. Following a white paper consultation on securing a path towards adequate housing, including fair rents and affordability, the [Welsh Government](#) published a summary of responses and set out its next steps in July 2025. These included commencing engagement with Rent Smart Wales and representative bodies for landlords, tenants and agents on developing proposals on the collection of rent data and for an annual property condition record.

Private sector rental affordability

91. Office for National Statistics (ONS) figures for [rental affordability](#) show that private renters on a median household income could expect to spend 25.9 per cent of their income on rent in Wales at the end of 2023/24. This compares with 36.3 per cent in England and 25.3 per cent in Northern Ireland.

92. The ONS considers average rents of 30 per cent or more of median incomes to be unaffordable. Private rents in Wales were last above this threshold in 2017 but have improved since then because incomes have risen faster than rents. Statistics in development that break down affordability by local authority area show that rents were above the 30 per cent threshold in Cardiff (33.4 per cent) and Vale of Glamorgan (32.2 per cent) and close to that level in Newport (29.6 per cent) and Monmouthshire (29.1 per cent).

93. However, these affordability ratios are for households on median incomes. Ratios are likely to be higher for renters on lower-quartile earnings paying lower-quartile rents, but these are not currently available within the ONS Price Index of Private Rents.

Social rents

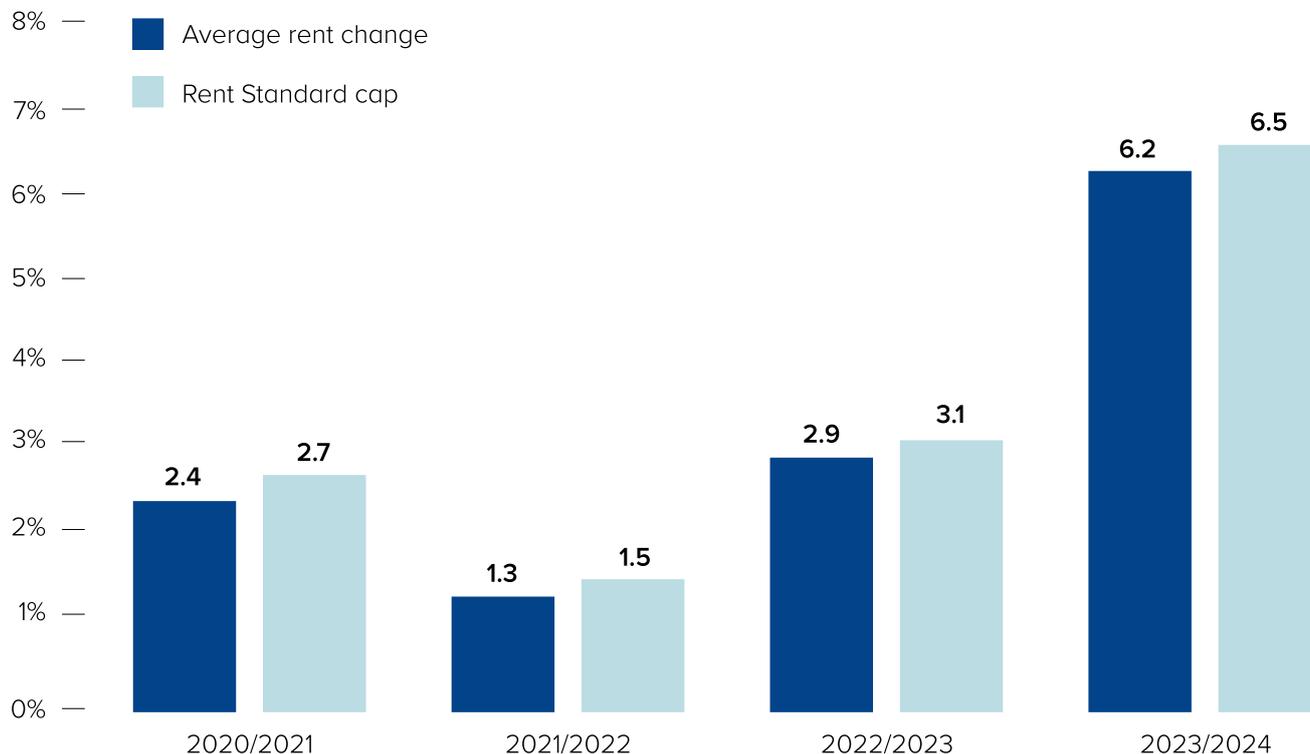
94. Rents for social housing in Wales are set by social landlords within a standard established by the Welsh Government that seeks to balance what tenants can afford with landlords' need to invest in new and existing homes. Between 2020 and 2025, then extended to 2026, the standard set a maximum rent increase envelope of Consumer Price Inflation (CPI) plus 1 per cent, with some flexibility to increase individual rents by a maximum of £2 a week. This applied where inflation fell between 0 and 3 per cent but Welsh Ministers could review and determine the maximum increase for the following year where inflation fell outside that range.

95. A new [Rent and Service Charge Standard](#) that will apply from 2026 to 2036 will also see social rents rise by Consumer Price Inflation plus 1 per cent. As before, this is the maximum increase allowable in any one year where the inflation rate in September falls between 0 per cent and 3 per cent. Where September CPI falls between 3 per cent and 5 per cent (as it did in September 2025 when it was 3.8 per cent) the maximum overall increase will be CPI+0.5 per cent. If September CPI exceeds 5 per cent ministers will determine the appropriate uplift to be applied for that year. In addition, individual tenants' rents can be reduced, frozen or increased by 'up to an additional £2.55 per week' on condition that the overall increase in rental income is no greater than the national formula.

96. Service charge increases will be expected to be 'reasonable and affordable' and landlords will be required to review them annually to ensure that they provide value for money for tenants and are affordable. Further analysis is being carried out before a decision on rent convergence, which could generate extra rental income and promote greater consistency across the sector.

97. Recently published research [on the rent setting practices of social landlords in Wales](#) presents a more detailed picture. It shows that in the four years to 2024/25, the average increase in social rents was slightly lower than the maximum allowed under the rent standard cap:

Figure 16: Average social rent increases in Wales by financial year



Source: [The rent setting practices of social landlords in Wales](#), monitoring return forms, authors' analysis.

98. Data on [social landlords housing stock and rents](#) show that the average weekly rent for a self-contained social home in Wales in 2024/25 was £114.05. This represented an increase of 7.1 per cent on the previous year (£106.50 in 2023/24) and 22 per cent on five years' ago (£93.22 in 2019/20). That is the equivalent of a monthly social rent of £494.21 in 2024/25, which represents 68 per cent of the average monthly private rent in Wales of £728.00 in March 2024.

99. Average social housing rents for 2024/25 varied considerably depending on the provider, housing type and local authority area. Housing association weekly rents were lowest in Blaenau Gwent (£102.27 per week) and Merthyr Tydfil (£103.66 per week) and highest in Flintshire (£125.50 per week), The Vale of Glamorgan (£123.81 per week) and Cardiff (£123.75 per week). Average local authority weekly rents for all self-contained social housing units for 2024/25 continued to be lowest in Pembrokeshire at £97.25 per week and highest in Cardiff at £126.62 per week.

House prices

100. House prices in Wales surged in the wake of the COVID-19 pandemic and recorded double digit annual increases in 2021 and 2022. They showed slight falls in 2023 and 2024 before returning to modest annual increases.

101. The [average house price in Wales in August 2025](#) was £211,000, a seasonally adjusted increase of 2 per cent over the previous 12 months. This compares with £296,000 in England (2.9 per cent), £194,000 in Scotland (4 per cent) and £185,000 in Northern Ireland¹¹ (5.5 per cent).

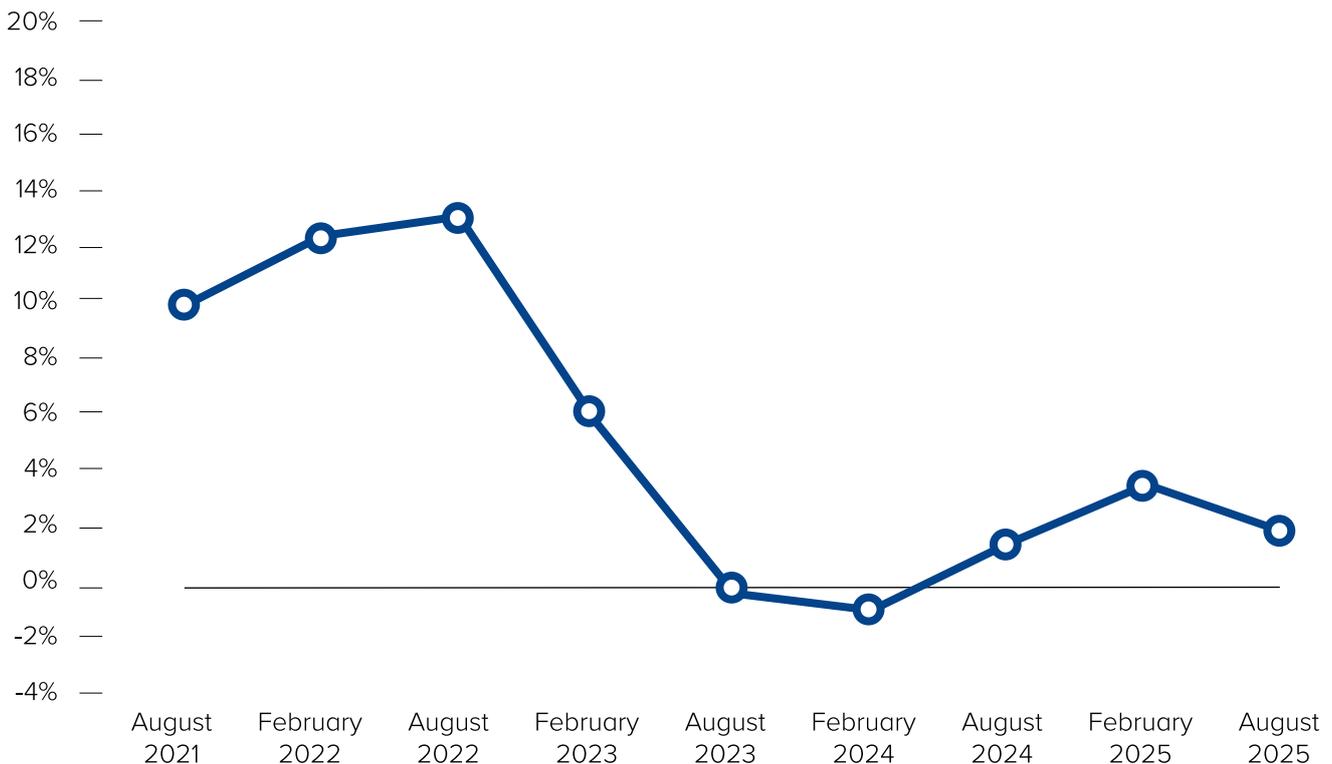
102. Within Wales, 18 out of 22 local authority areas showed an increase in average house prices over the last 12 months, led by Bridgend (6 per cent). Merthyr Tydfil (-8.5 per cent) and Ceredigion (-5.3 per cent) recorded the biggest falls.

103. The most expensive areas to buy were Monmouthshire (£332,000), Vale of Glamorgan (£289,000) and Cardiff (£269,000) while the cheapest areas were Merthyr Tydfil (£137,000) Blaenau Gwent (£141,000), and Rhondda Cynon Taf (£158,000).

104. Prices of all types of houses rose in the last 12 months, with semi-detached houses leading the way (3.8 per cent) but the average price of maisonettes and flats fell by 1.4 per cent.

105. The gap between the prices of new build and existing homes has widened in recent months. In June 2025 the average price of a new build property was £352,000 (up 18.5 per cent in the last year) whereas the average existing property cost £207,000 (up 1.9 per cent).

¹¹ In the April to June 2025 quarter compared to 12 months earlier.

Figure 17: Annual house price change in Wales

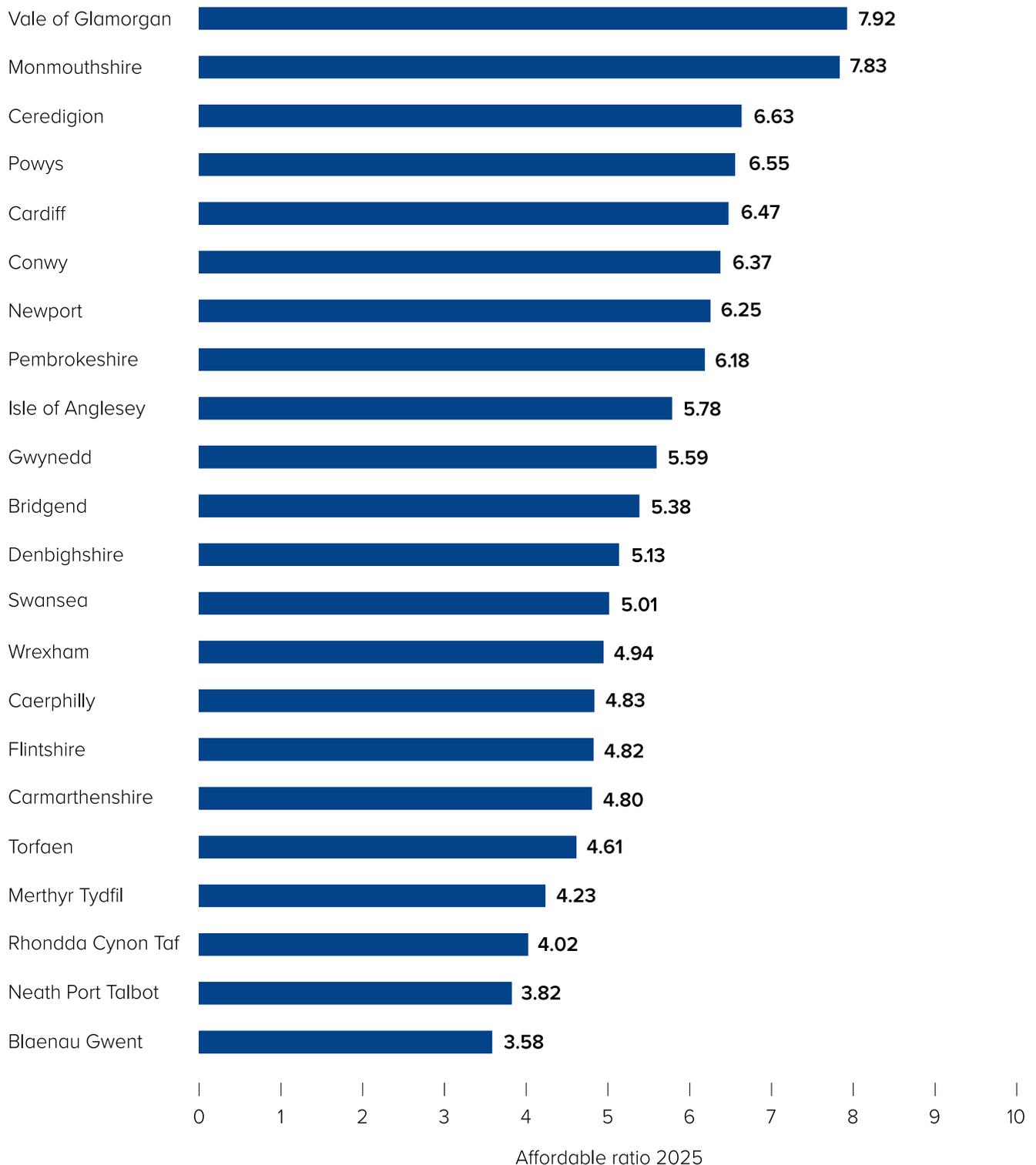
Source: [UK house price index Wales](#).

House price affordability

106. The ONS considers a ratio of 5:1 as a general threshold for affordability when comparing house prices to household incomes. If a home costs more than five times a household's annual disposable income, it is generally deemed unaffordable under this measure.

107. [ONS housing affordability statistics for 2024](#) show that the average price of a home in Wales represented 5.86 times the median average earnings of a full-time employee. This compares with 7.7 times earnings in England. Unaffordability in Wales peaked in 2007 (6.59 times earnings) and 2021 (6.56 times earnings) but has improved since the COVID-19 pandemic.

108. Locally, 17 out of 22 local authority areas in Wales had affordability ratios of more than five times earnings. The most unaffordable areas were Monmouthshire (8.5 times earnings), Vale of Glamorgan (8.4) and Ceredigion (7.5). Five areas (Torfaen, Merthyr Tydfil, Rhondda Cynon Taff, Neath Port Talbot and Blaenau Gwent) had ratios below five times earnings.

Figure 18: Median housing affordability ratio by local authority, 2024

Source: House price statistics for small areas, Annual Survey of Hours and Earnings from the Office for National Statistics.

First-time buyers

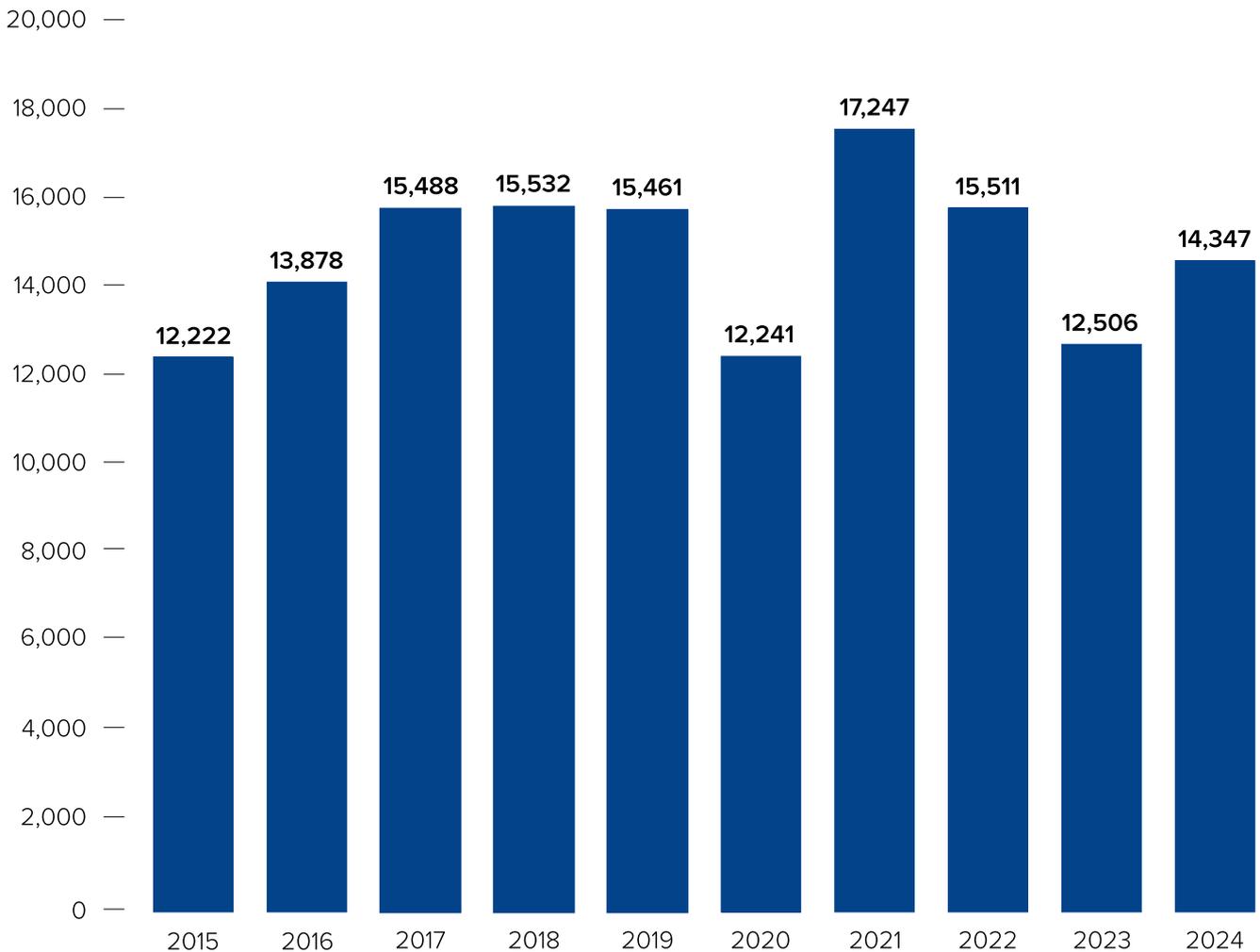
109. There were 14,347 sales to first-time buyers¹² in Wales in 2024, representing 45 per cent of total residential sales, according to the [Financial Conduct Authority](#).

110. The number of first-time buyer sales was up 14.7 per cent on 2023 but down 7.5 per cent on 2022. For context, the number of homes sold to first-time buyers in Wales slumped to a low of just 7,680 in 2008 in the wake of the financial

crisis but recovered after 2013 supported by low interest rates and government schemes such as Help to Buy. Numbers fell again during the pandemic in 2020 and then recovered.

111. First-time buyers paid an average of £180,000 for their home in June 2025, up 2.7 per cent on a year earlier, according to Land Registry data. Existing owner-occupiers paid an average of £251,000 (up 2.8 per cent).

Figure 19: First time buyers by year in Wales



Source: [First-time buyer mortgage sales](#), Financial Conduct Authority.

¹² Note this does not include first-time buyers with no mortgage.

Wellbeing and affordability

112. The percentage of households spending more than 30 per cent of their income on housing costs is also one of the Welsh Government's [Wellbeing of Wales national indicators](#). This is assessed over three-year rolling financial periods. According to the latest figures for 2022 to 2024, 15 per cent of Welsh households have housing costs above the threshold. Some 37 per cent of private tenants and 36 per cent of social tenants are spending more than 30 per cent of their income on housing costs, compared to 8 per cent of owners with a mortgage and 3 per cent of outright owners.

Housing benefit

113. The number of households claiming housing benefit in Wales halved between 2015 and 2025 as more claimants switched to universal credit, according to Department for Work and Pensions statistics collected for the [UK Housing Review](#). By 2025, 90,000 households were claiming housing benefit, made up of 29,000 local authority tenants, 45,000 housing association tenants and 16,000 private tenants. The number of households in receipt of [Universal Credit housing costs element](#) has increased from 3,600 in 2016 to 199,000 in 2025. The overall number of households claiming the two forms of housing support rose 18 per cent from 245,000 in 2016 to 289,000 in 2025.

114. Between 2015 and 2025, the average housing benefit payment increased by 65 per cent for council tenants and 70 per cent for housing association tenants but only 26 per cent for private tenants. This in part reflects repeated freezes in Local Housing Allowance (LHA) by the UK Government.

By 2024, 77 per cent of households in Wales in receipt of universal credit had [a rent that exceeded their LHA](#), the highest proportion in the UK.¹⁴ LHA rates were restored to the 30th percentile of local rents in April 2024 after a four-year freeze only to be frozen again at the new level in 2025. This has meant shortfalls between LHA rates and 30th percentile rents for most sizes of property in most Broad Rental Market Areas (BRMAs) in Wales. Rents for properties that are available on the market may be higher still.

115. This affordability gap varies by area and size of home. [Rent Officers Wales statistics](#) for 2025/26 show the 30th percentile of local rents that would have applied without the freeze and LHA rates by in each BRMA. Taking two-bed homes as an example, there were shortfalls between rents and LHA rates in 22 of 23 BRMAs covering Wales. Shortfalls were highest in Newport (£34.52 a week), Rhondda Taff (£19.56) and Caerphilly (£18.41) and lowest in South Gwynedd (£5.86) Bridgend (£5.76) and Ceredigion (£5.75). In Brecon and Radnor, the two-bed LHA rate was 19p per week higher than the 30th percentile rent.

116. Following the UK Autumn Budget 2025, LHA rates remain frozen for 2026/27. The UK Work and Pensions Secretary confirmed that there would be no uplift to LHA rates, which means they will stay at the same level as in April 2024 until at least March 2027. This freeze is part of a longer-term policy: LHA rates remain 'under review' but government spending forecasts assume expenditure on LHA will remain unchanged in cash terms until at least 2029–30.

¹⁴ LHA is set on the basis of the rental costs of existing tenancies, which are typically lower than the rents of advertised new tenancies.

¹⁵ For council tax purposes, a second home is defined as a dwelling that is not a person's sole or main home and is substantially furnished. The council tax definition of a second home is not limited to properties used as private weekend/holiday homes. It includes for example, dwellings retained for work purposes, dwellings available for sale, seasonal homes and caravans.

Second homes and holiday lets

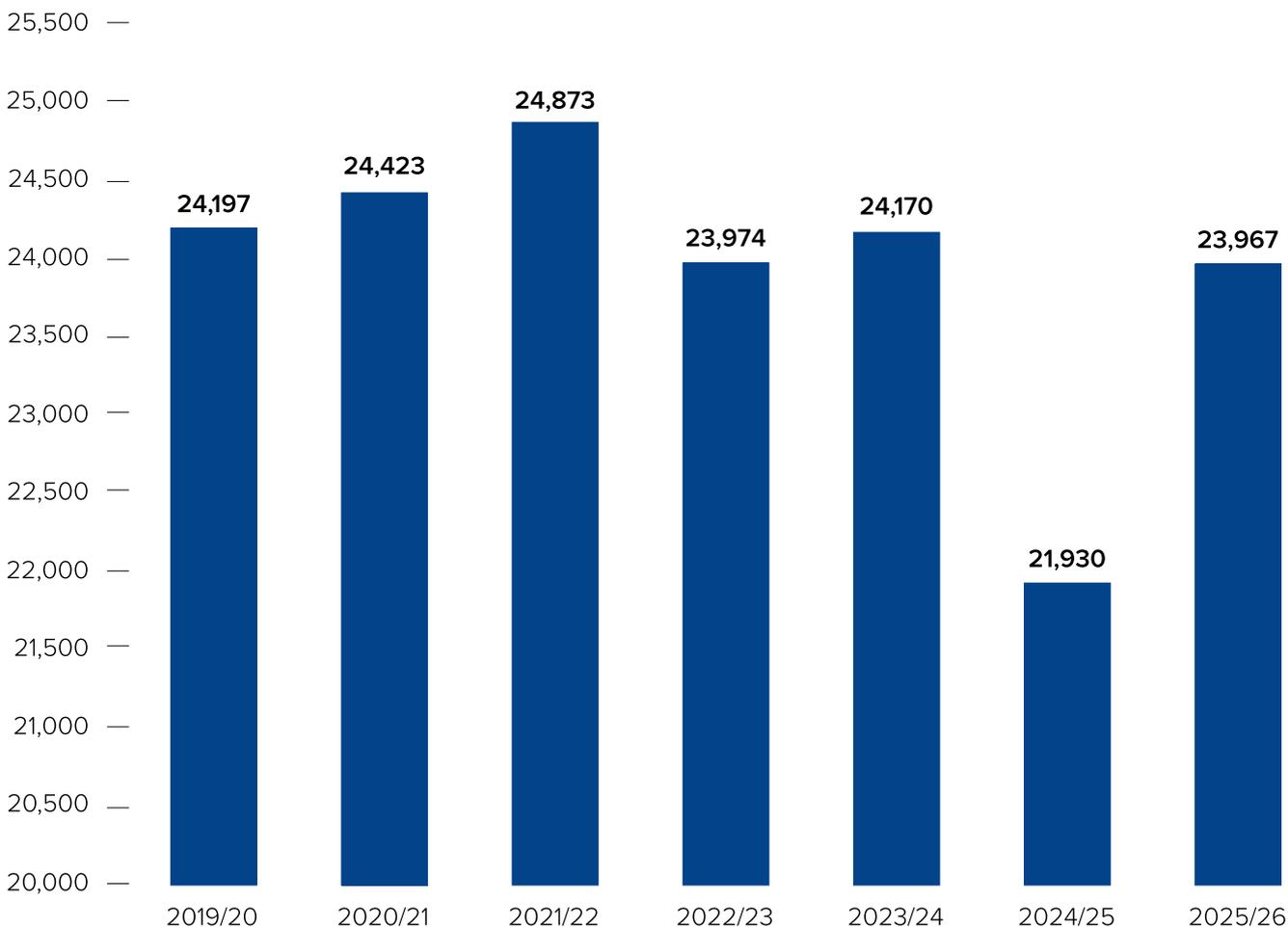
117. [Council tax records](#) show that local authorities estimated that there were 23,967 chargeable second homes¹⁵ across Wales in 2025/26, an increase of 9.3 per cent on the previous year. Second homes were most numerous in Gwynedd (4,588 or 7.8 per cent of council tax dwellings) and Pembrokeshire (3,942 or 6.4 per cent).

118. The second homes statistics, however, do not include all of the homes in Wales that are not being used as primary residences. [Analysis by Welsh Government](#) in 2023

found that the number of properties in Wales used as self-catering holiday lets (and paying business rates rather than council tax) almost trebled between 2013/14 and 2022/23 to 11,400. This number has fallen slightly since tighter eligibility rules were introduced in April 2023, with some of these holiday lets likely to have been reclassified as chargeable second homes.

119. The same analysis found that 26,000 unique properties were being advertised as short-term lets but could be used as primary homes (though it was not clear how many of these were also in the council tax and business rates categories above).

Figure 20: Second homes in Wales



Source: Stats.gov.wales chargeable empty and second homes statistics.

CHAPTER 4

Homelessness

Introduction

120. Wider economic and geo-political events have increased demand for housing and homelessness services over the 10 years since the Housing (Wales) Act 2014 introduced fundamental reform of the homelessness legislation and a more inclusive system focussed on prevention of homelessness.

121. This chapter looks in detail at the trends over a period which has seen, on the one hand, further improvements to the homelessness system in Wales and, on the other, a cost of living crisis that has increased pressure on household budgets.

122. Improvements include the ‘no one left out’ approach adopted to rough sleeping during the COVID-19 pandemic and the subsequent extension of ‘priority need’ status to include people who are street homeless. In addition, as part of the rent standard, social landlords agreed not to evict tenants in financial hardship where they are engaging with their landlord. Wider policy has focussed on the target of 20,000 homes for social rent in this Senedd term, with the Transitional Accommodation Capital Programme introduced alongside social housing grant (see Chapter 1).

123. The Welsh Government’s high-level action plan for 2021 to 2026, Ending [Homelessness in Wales](#), is part of a commitment in the Programme for Government to fundamentally reform homelessness services to focus on prevention and rapid rehousing.¹⁶

124. The Ending Homelessness Outcome Framework sets a clear strategic direction by aligning long-term outcomes with the Ending Homelessness Action Plan and measuring progress through robust data indicators.

125. A new Homelessness and Social Housing Allocation (Wales) Bill is aimed at transforming the system so that it focuses on earlier identification and prevention, targets action at those most at risk and brings a multi-agency response to homelessness. The statistics cited here reflect the position before this next step in the Welsh Government’s ambition to make homelessness brief, rare and unrepeatable.

126. The chapter assesses recent trends in homelessness prevention and relief, temporary accommodation and rough sleeping before turning to the wider picture on possession actions by mortgage lenders and landlords and rent arrears among social tenants.

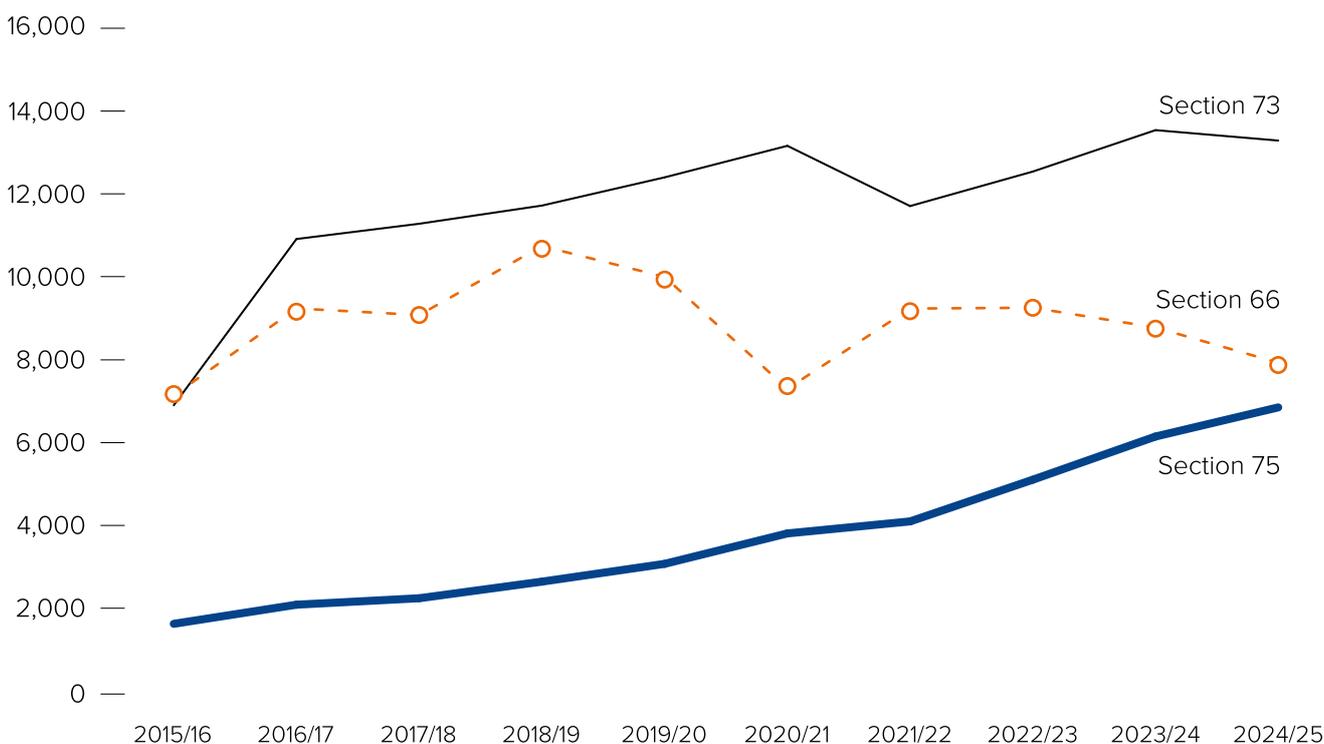
¹⁶ For a more detailed breakdown of progress in preventing and ending homelessness measured against multiple indicators, see the Ending Homelessness Outcomes Framework: 2025 Update Report published in October 2025.

Homelessness prevention and relief

127. A key aim of the Housing (Wales) Act 2014 was to ensure that local authorities intervene to prevent homelessness (Section 66) or relieve homelessness (Section 73) at an earlier stage than previously. The intention was that this would in turn reduce the number of households owed the main housing duty (Section 75).

128. Drawn from the [homelessness statistics for 2024/25](#), the graph below shows trends in the number of households owed the prevention, relief and main housing duties since 2015/16. Further analysis follows in the sections below.

Figure 21: Households threatened with homelessness (section 66), owed a duty to help secure accommodation (Section 73) and in priority need (section 75)



Source: stats.gov.wales [Homelessness: April 2024 to March 2025](#).

129. Local authorities reported similar reasons for households being threatened with homelessness under the three categories of assistance. For those owed the prevention duty, 'loss of rented or tied accommodation' was cited in 33 per cent of cases and 'parent or other relative or friends no longer willing to accommodate' in 26 per cent. For those owed the relief duty, the main reason for homelessness was given as 'parent or other relative or friends no longer willing to accommodate' in 30 per cent

of cases and 'breakdown of a relationship with a partner' in 20 per cent (of which just under half involved a violent breakdown).

130. For those owed the main housing duty, the main reasons were 'parent or other relative or friends no longer willing to accommodate' (29 per cent) and breakdown of a relationship with a partner' (20 per cent). Just over half of the latter involved a violent relationship breakdown.

Homelessness prevention

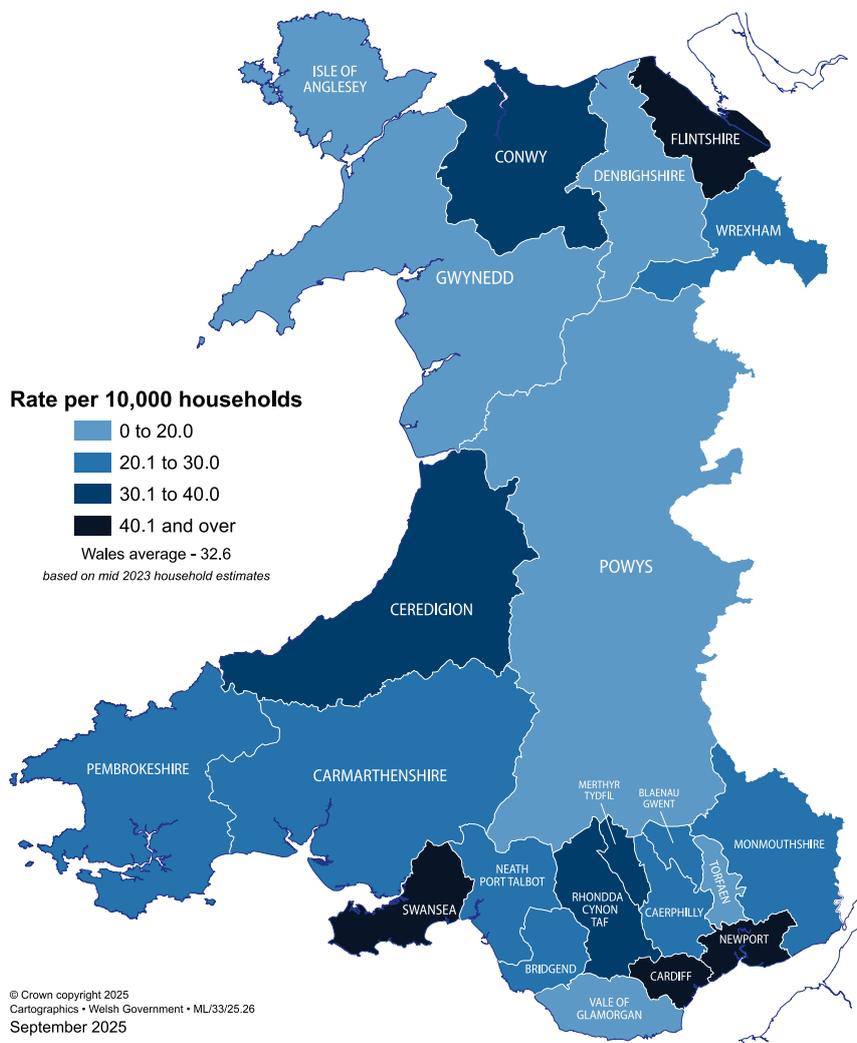
131. The [annual homelessness statistics](#) show that 7,920 households were found to be eligible and threatened with homelessness (Section 66 of the 2014 Act triggering the prevention duty for local authorities) in 2024/25, down 10 per cent on 2023/24.

132. Homelessness was successfully prevented for at least six months in 57 per cent of these cases. However, this proportion of prevention duty outcomes judged successful has declined from 68 per cent in 2018/19.

133. Successful preventions of homelessness for at least six months per 10,000 households is one of the [Wellbeing of Future Generations national indicators](#). The rate per 10,000 households in 2024/25 was 33 per cent, down from 37 per cent in 2023/24 and a peak of 54 per cent in 2018/19.

134. Cardiff had the highest rate of successful homelessness preventions (70.5 per 10,000 households) as well as the highest number of households where homelessness was prevented (1,109) while Gwynedd had the lowest rate (4.8) and the lowest number of households (25).

Figure 22: Households successfully prevented from homelessness, rate per 10,000 households 2024/25



135. Prevention of homelessness for at least six months was unsuccessful in 27 per cent of cases (2,137 households) across Wales, meaning that they became eligible for further assistance (see below). For the remaining 16 per cent of households who were eligible and threatened with homelessness (1,292), the prevention duty ended. The main reasons for this were that the application was withdrawn (315 households) or withdrawn due to loss of contact (690).

Homelessness relief

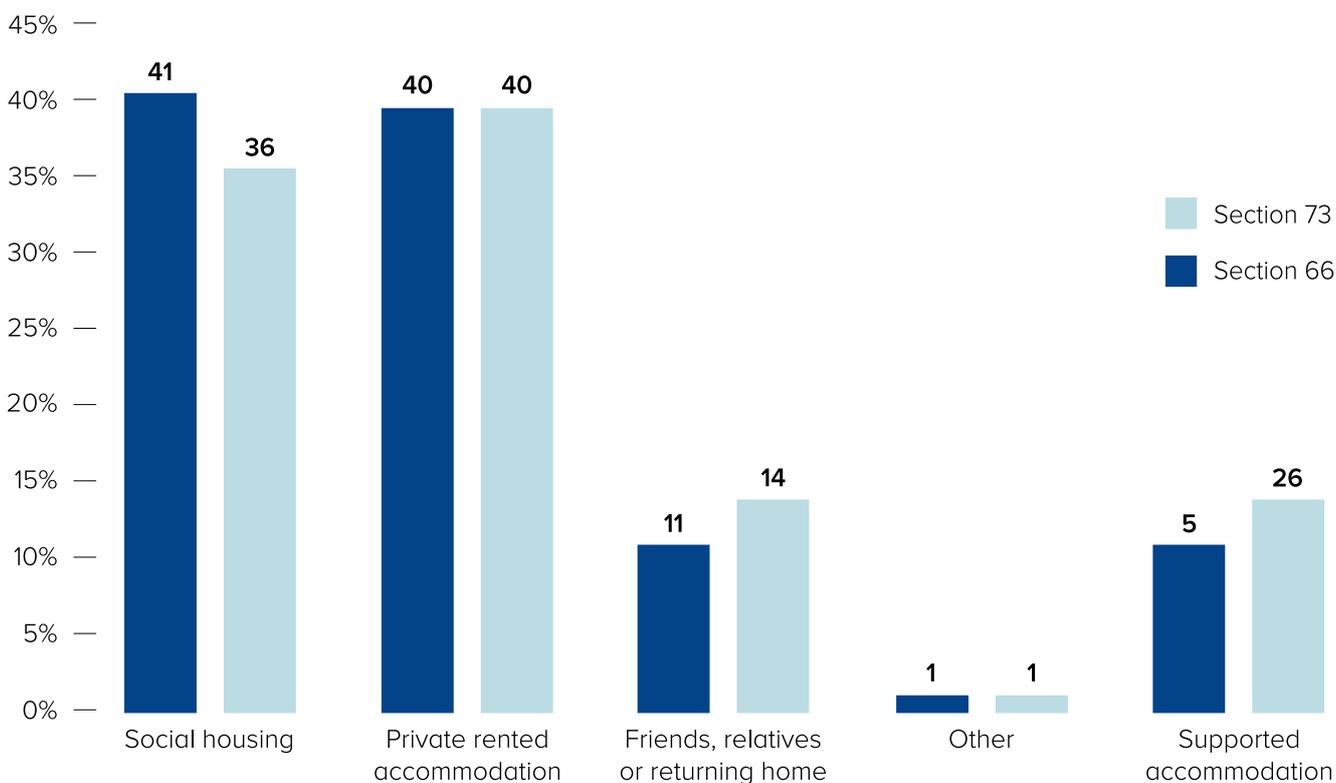
136. The number of households assessed as homeless and owed a duty to help secure accommodation (Section 73 of the 2014 Act, triggering the relief duty for local authorities) has seen a significant increase in the last ten years. There were 13,287 households in this position in [2024/25](#), down 2 per cent on 2023/24 but up 93 per cent on 2015/16.

137. Some 25 per cent of those owed the relief duty in 2024/25 (3,371) were successfully helped to secure accommodation that was likely to last for at least six months following intervention by the local authority (down 1 per cent on the previous year).

Prevention and relief outcomes

138. Local authorities were able to assist 69 per cent of households under the prevention duty (3,084 under Section 66) and 25 per cent of households under the relief duty (3,372 under Section 73) to secure alternative accommodation. The graph below shows the types of accommodation secured under the prevention and relief duties.

Figure 23: Percentage breakdown of alternative accommodation secured to prevent (Section 66) and relieve (section 73) homelessness, April 2024 to March 2025



Main housing duty

139. Some 6,840 households were identified as eligible, unintentionally homeless and in priority need and owed the main housing duty (Section 75) in 2024/25. This was up 11 per cent on 2023/24 and has risen every year since the legislation was introduced in 2015. Of those owed the main housing duty, 1,926 (28 per cent) were households with children and 4,503 (66 per cent) were single households. This rising trend is partly due to the extension of the priority need categories to include people who are street homeless in Autumn 2022 but was established before that. In the 10 years since 2015/16, the number of households owed the main housing duty has more than quadrupled.

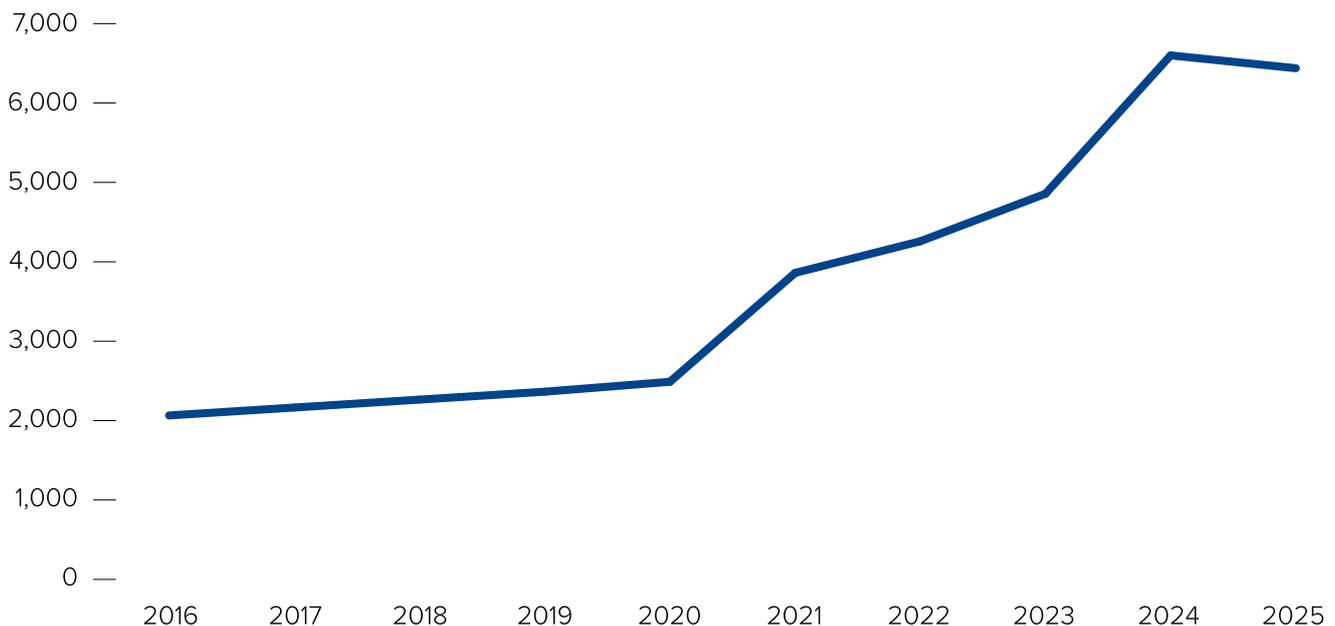
140. Some 71 per cent of these households (4,859) were 'positively discharged' by accepting an offer of suitable settled accommodation, like the previous year but down from a peak of 81 per cent in 2016/17.

Temporary accommodation

141. At the start of the COVID-19 pandemic in March 2020, the Welsh Government applied a 'no one left out' approach so that no-one was forced to sleep rough. The addition of a priority need category for those who are 'street homeless' in 2022 has ensured the continuation of the approach. This has resulted in greater numbers of people being supported in temporary accommodation.

142. At the end of March 2025 there were 6,285 households in temporary accommodation, down three per cent on the previous year¹⁷. This is the first fall on this measure since 2015, a period in which the number of households in temporary accommodation has more than trebled. Most of this increase has taken place since 2020. The proportion of these households who are families with children has fallen from 41 per cent to 24 per cent in the last 10 years.

Figure 24: Number of households in temporary accommodation as of 31 March annually



Source: stats.gov.wales [Homelessness: April 2024 to March 2025](#)

¹⁷ This is a snapshot of the numbers in temporary accommodation at the end of that month and so does not include all households placed in temporary accommodation over the year.

143. Of these households in temporary accommodation at the end of March 2025, 3,714 (59 per cent) had been in temporary accommodation for under six months, 1,408 (22 per cent) for six to 12 months and 1,164 (19 per cent) for over a year. Families with children made up 20 per cent of households accommodated for under 6 months, 28 per cent of those in temporary accommodation for six to 12 months and 30 per cent of those accommodated for over a year.

144. The number of households in temporary accommodation increased in 12 out of 22 local authorities between March 2024 and March 2025. Cardiff accounted for the highest number of households in Wales (1,079), including 573 families with children, while Blaenau Gwent accounted for the lowest (38 households, of which 12 were families with children).

Young people

145. In 2024/25, 16- and 17-year-olds were placed in bed and breakfast accommodation on 118 occasions under the homelessness legislation (down 6 per cent on 2023/24) and on a further 47 occasions under the children's social services legislation (up 31 per cent). Care leavers aged 18 to 21 were placed in bed and breakfast accommodation under the homelessness legislation on 226 occasions in 2024/25 (up 26 per cent).

Temporary accommodation month by month

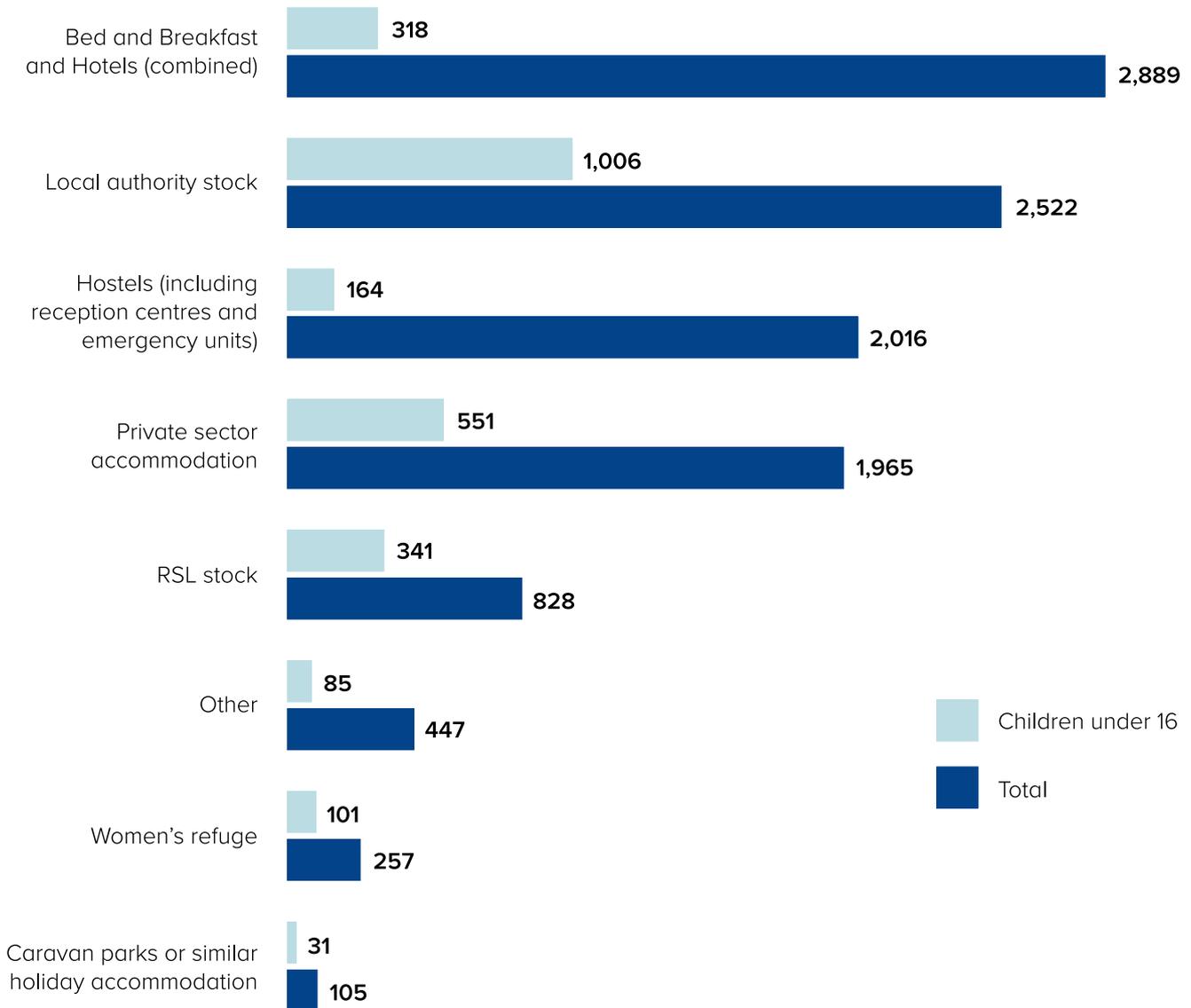
146. Separate monthly statistics present more detailed and up-to-date information about [homeless accommodation provision](#) and also present data on the number of people (rather than households) affected.

147. During August 2025, 1,326 homeless people were placed in temporary accommodation, a decrease of 8 per cent on August 2024 and 26 per cent on August 2023. Of those, 243 were dependent children under 16 and 243 were 16-24 year olds.

148. A total of 11,029 people were housed in temporary accommodation as at the end of August, down slightly on August 2024 and August 2023. Of these, 2,597 were dependent children under 16, a decrease of 9 per cent on August 2024 and 24 per cent on August 2023.

149. [A more detailed breakdown](#) of the statistics shows that the most common type of temporary accommodation was bed and breakfast and hotels (2,889 people and 318 children), followed by local authorities' own stock. The number of people in B&Bs has fallen by 21 per cent over the last two years while the number of children under 16 has fallen by 68 per cent.

Figure 25: Homeless temporarily accommodated by type of accommodation as of 31 August 2025

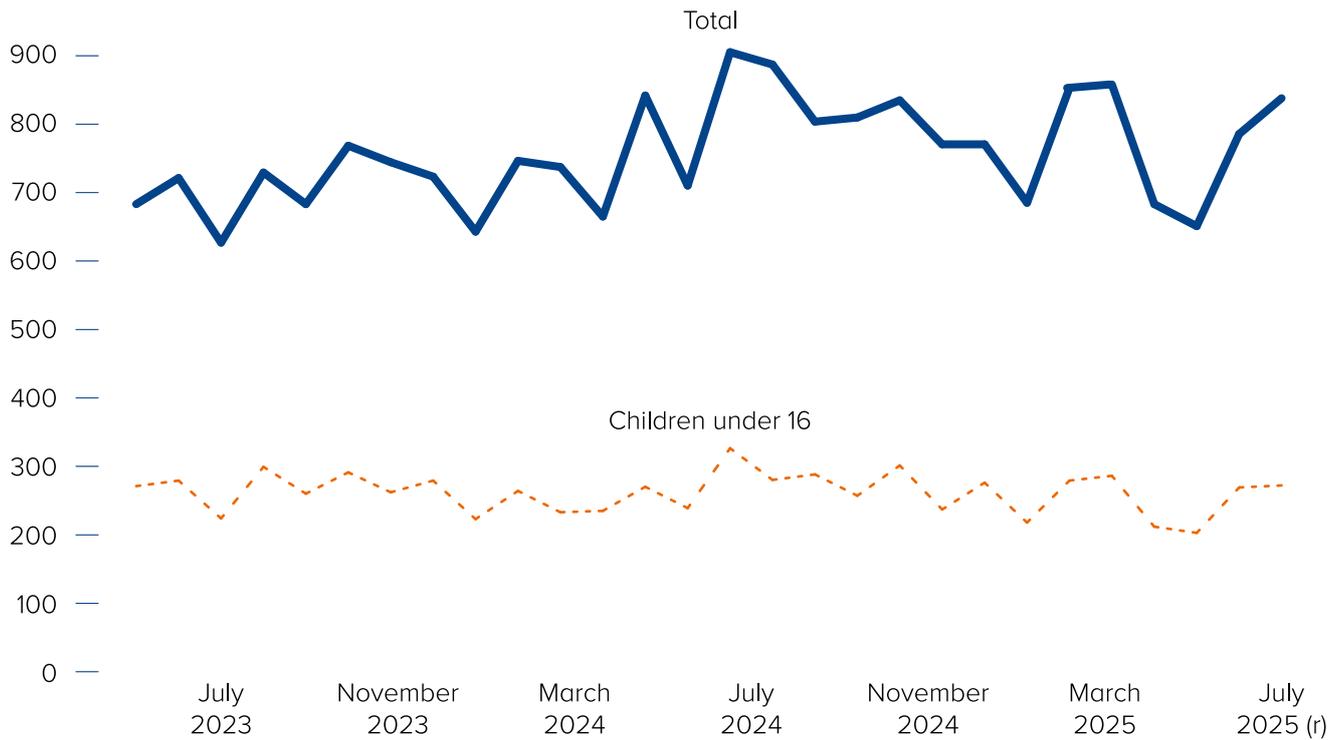


Source: Stats.gov.wales, [Homelessness accommodation provision and rough sleeping: August 2025](#)

150. Some 663 homeless people [moved into suitable long-term accommodation](#) in August 2025, which is at the lower end of a total that has fluctuated between

600 and 900 a month over the last two years. The movers included 202 children under 16, a decrease of 25 per cent from April 2024 and 17 per cent on April 2023.

Figure 26: Homeless individuals moved to suitable long-term accommodation monthly between April 2023 and August 2025

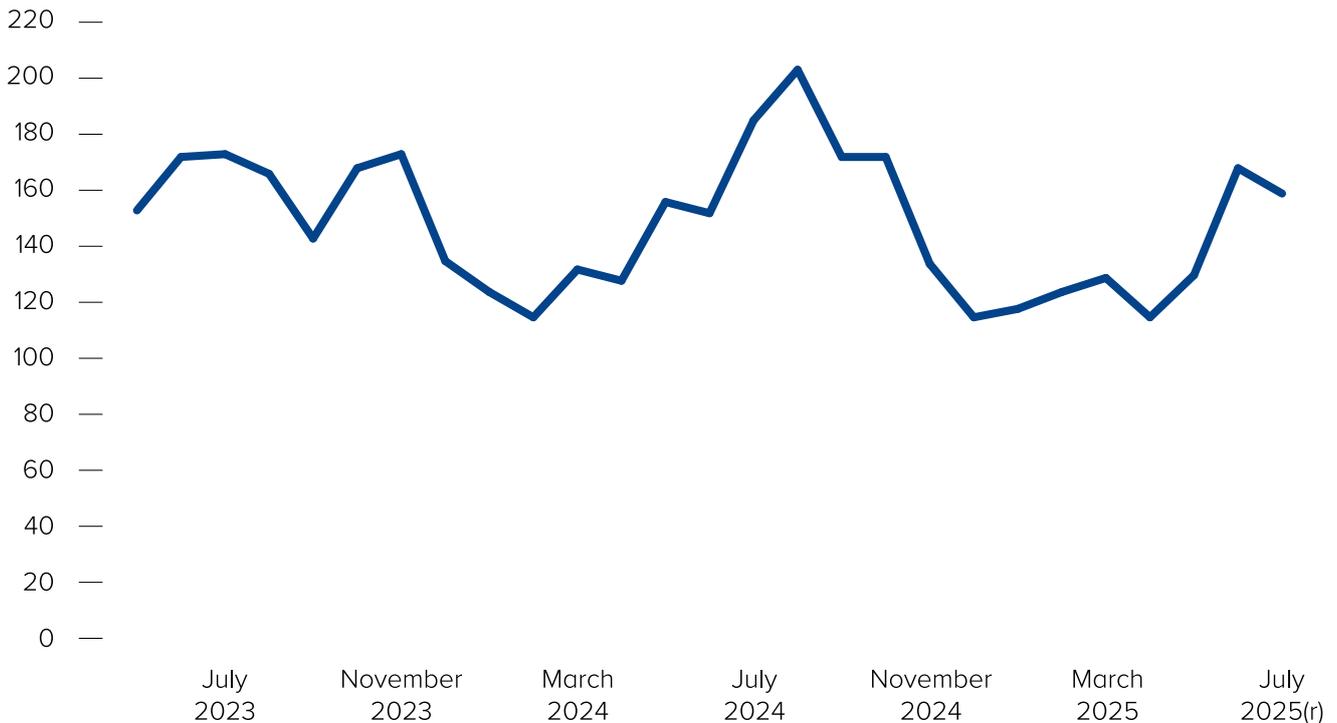


Source: [Stats.gov.wales](https://stats.gov.wales), [Homelessness accommodation provision and rough sleeping: August 2025](#).

Rough sleepers

151. As at the end of August 2025, there were estimated to be 168 people [sleeping rough](#) in Wales. This compares with a peak of 204 in August 2024 and 167 in August 2023.

These are monthly estimates submitted by local authorities, which have replaced the annual snapshot counts conducted prior to the COVID-19 pandemic.

Figure 27: Number of rough sleepers in Wales, April 2023 to August 2025

Source: [Stats.gov.wales](https://stats.gov.wales), [Homelessness accommodation provision and rough sleeping: August 2025](#).

152. Cardiff (27), Pembrokeshire (19), Torfaen (15) and Ceredigion and Bridgend (both 14) reported the highest numbers of people sleeping rough in August 2025. Four local authorities reported no rough sleepers.

Mortgage and landlord possession actions

153. Possession actions by mortgage lenders have been trending upwards in Wales since the moratorium during the pandemic, according to Ministry of Justice statistics. Claims, orders, warrants and repossessions by county court bailiffs in 2024 were up by around 40 per cent on 2023, and numbers for the first half of 2025

also showed a significant increase. However, to put this in context, there were more than 1,000 mortgage repossessions by bailiffs in every year from 2007 to 2013 in the wake of the financial crisis compared to 238 in 2024.

154. By contrast, possession actions by social landlords have fallen sharply. This decline is consistent with their commitment under the rent standard not to evict tenants due to financial hardship where they are engaging with their landlord. In 2019 social landlords made 3,107 possession claims and there were 665 repossessions by county court bailiffs on their behalf but by 2024 these numbers had fallen to 737 and 155 respectively.

155. Claims under the accelerated procedure, which can be made by social and private landlords, rose significantly between the pandemic and 2023. Bailiff repossessions via this route reached their highest ever level (638) in 2023 before falling in 2024.

156. Actions by private landlords rose quickly after the pandemic, with repossessions by county court bailiffs reaching a record high of 350 in 2024, but figures for the first half of 2025 show a slight decline.

Figure 28: Landlord repossessions by county court bailiffs in Wales

	Social Landlord	Private Landlord	Accelerated procedure
2015	953	142	181
2016	862	159	220
2017	775	162	243
2018	766	198	224
2019	665	246	276
2020	226	88	71
2021	88	89	94
2022	164	261	344
2023	173	340	638
2024	155	350	185

Source: [Mortgage and landlord possession statistics](#), Ministry of Justice Note: Data is based on the location of the court rather than of the property.

Social landlord rent arrears

157. Some 108,424 [social housing tenancies were in rent arrears](#) in 2023/24, representing almost half of the 238,700 social tenancies in Wales. Of that total number, 72,397 were tenants of registered social landlords (48 per cent of tenancies) and 36,000 tenants of local authorities (41 per cent). Across Wales, the highest percentage of social housing tenancies in arrears was seen in Newport (64 per cent) and the lowest in Powys (31 per cent).

158. As at March 2024, 98,268 social tenancies had been in arrears for less than 13 weeks and 10,156 had arrears of more than 13 weeks. This was the first year in which the number of social tenancies in longer-term arrears has exceeded 10,000.

159. These numbers are the highest recorded in data going back to 1996/96 but at least some of the increase will be attributable to the 'no evictions' policy introduced under the rent standard for social landlords. Since 2020/21, the total number of council tenants in arrears has risen 15 per cent while RSL tenants in arrears are up 22 per cent.