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Institute of  
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Cymru

# Sector Snapshot 2025:

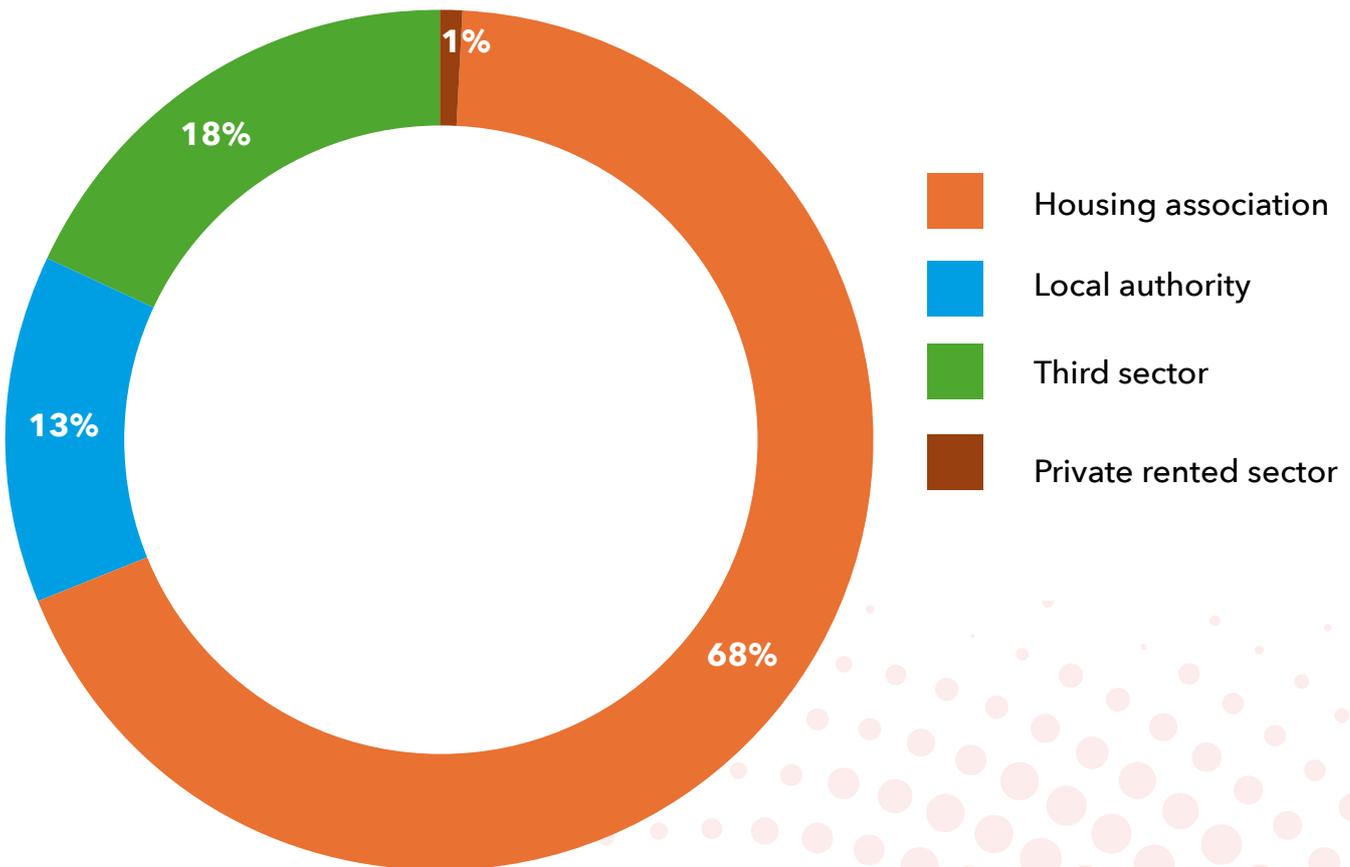
## Survey of housing professionals in Wales

April 2025

## Introduction

This report outlines the findings of our latest sector snapshot survey of housing professionals in Wales. This series of surveys provides invaluable data on the lived experience of housing professionals in Wales. The survey for 2025 sought to establish how the sector is managing the competing priorities of developing the homes we need and retrofitting our existing homes. It also asked the sector about the potential impact of the UK government's decision to increase employers' national insurance contributions.

The survey ran during February 2025 and received a total of 69 responses. Whilst this is lower than the previous responses to our sector snapshots, the results illustrate a continuing narrative of people wanting to work in the sector to make a difference, but who need more support due to the pressures they are experiencing. The respondents worked for the following:



A key difference for this year's sector snapshot is that individuals working in third sector organisations have also responded. This has not been the case on other sector snapshot surveys. Those respondents working in the third sector were employed as outreach workers, support workers and dedicated rough sleeper support. Respondents from housing associations and local authorities were employed as housing officers, policy officers, housing directors and homelessness team leaders. We also received responses from individuals working in finance and HR. This report sets out some of the key trends from the survey responses.

## Executive summary

This survey has continued the narrative that people work in housing as they want to make a positive impact on people's lives and within the communities they work within.

**"The difference we make on a daily basis to people who live in our communities, trying our best to help them thrive rather than just survive."**

Mirroring previous sector snapshot surveys held in 2024 and 2023, respondents were clear that their number one housing priority was to increase the supply of homes. This increased supply of homes was also seen as the key measure to tackle rising homelessness in Wales. Yet despite the recognition that more homes are needed, 83 per cent of respondents are not confident or unsure that Welsh government's current target to build 20,000 low carbon social homes by 2026 will be achieved. Reasons for this is a lack of funding and ongoing issues with the planning system. Some respondents also felt there was a lack of focus from Welsh government in meeting the target.

A lack of resources, high workloads and a reducing workforce were key pressures for our respondents, as seen across the past few years of our sector snapshot reports. Housing associations were also feeling pressure from policy changes with not enough time given to implement a policy change. These pressures are continuing to negatively impact housing professionals' mental health and wellbeing. Two thirds of local authority and housing association respondents stated there was an impact. Yet the introduction of four day weeks and the pride from seeing a good outcome were seen as having a positive impact on mental health and wellbeing.

Respondents were clear in their key asks of Welsh government. They wanted more funding and for them to listen to the sector. To actually hear what the sector is telling them about policy changes. Some were clear that a more joined-up approach was needed to address all the issues facing housing, with the solution being a housing strategy for Wales.

## Survey findings

### What motivates you to work in the housing sector

The majority of respondents stated that they worked in housing to make a difference and help residents and communities, with 84 per cent stating this as the reason they worked in housing. This mirrored the response in 2024 where 77 per cent of respondents worked in housing to make a difference. Other responses to the survey highlighted the culture and values of their organisation and job satisfaction.

**"The ability to make positive impact on people's lives by providing them with accommodation, contributing to their overall wellbeing and quality of life"**

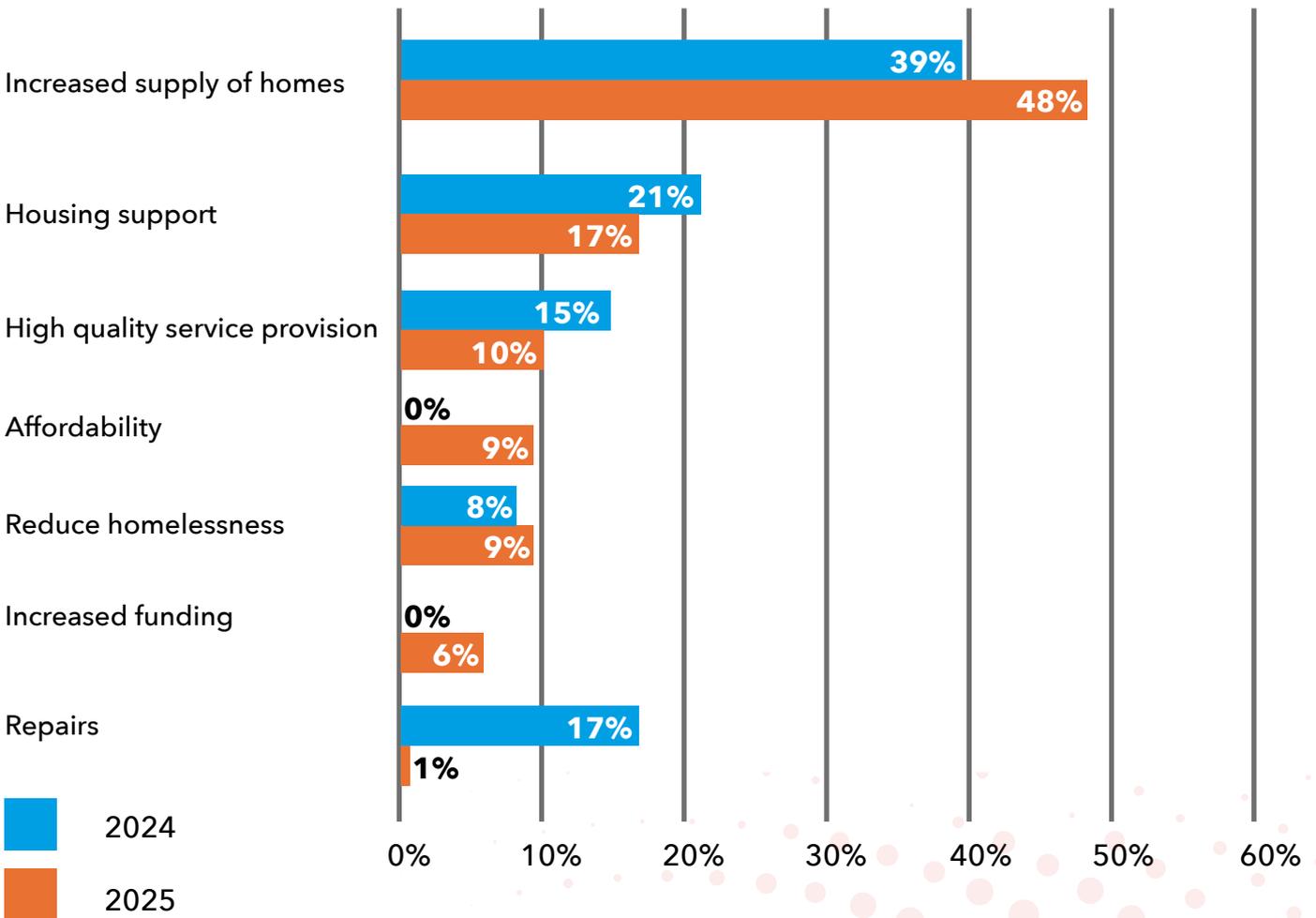
**"People can only thrive if they have good quality homes and communities. I like the fact I contribute to this. I also enjoy being part of a community of Welsh housing professionals"**

**"Having a safe, warm, affordable home is the foundation for life. I'm choosing to use my skills and experience to ensure our organisation can have the greatest possible impact in an area of significant deprivation. That's motivation enough."**

## What is the number one housing priority?

As seen in the 2024 sector snapshots, the main housing priority for respondents was to increase the supply of homes, with 48 per cent stating this was their main priority. Respondents also felt that housing support and ending homelessness was a priority and this was often linked to a need for more homes, of the right type, with the right support for the individual. In this snapshot, the need for rents to be more affordable was a priority for nine per cent of respondents. As shown in figure one, this is a new priority for 2025, possibly an indication of the ongoing impact of the cost of living crisis on our tenants and communities.

Figure one: Number one housing priority



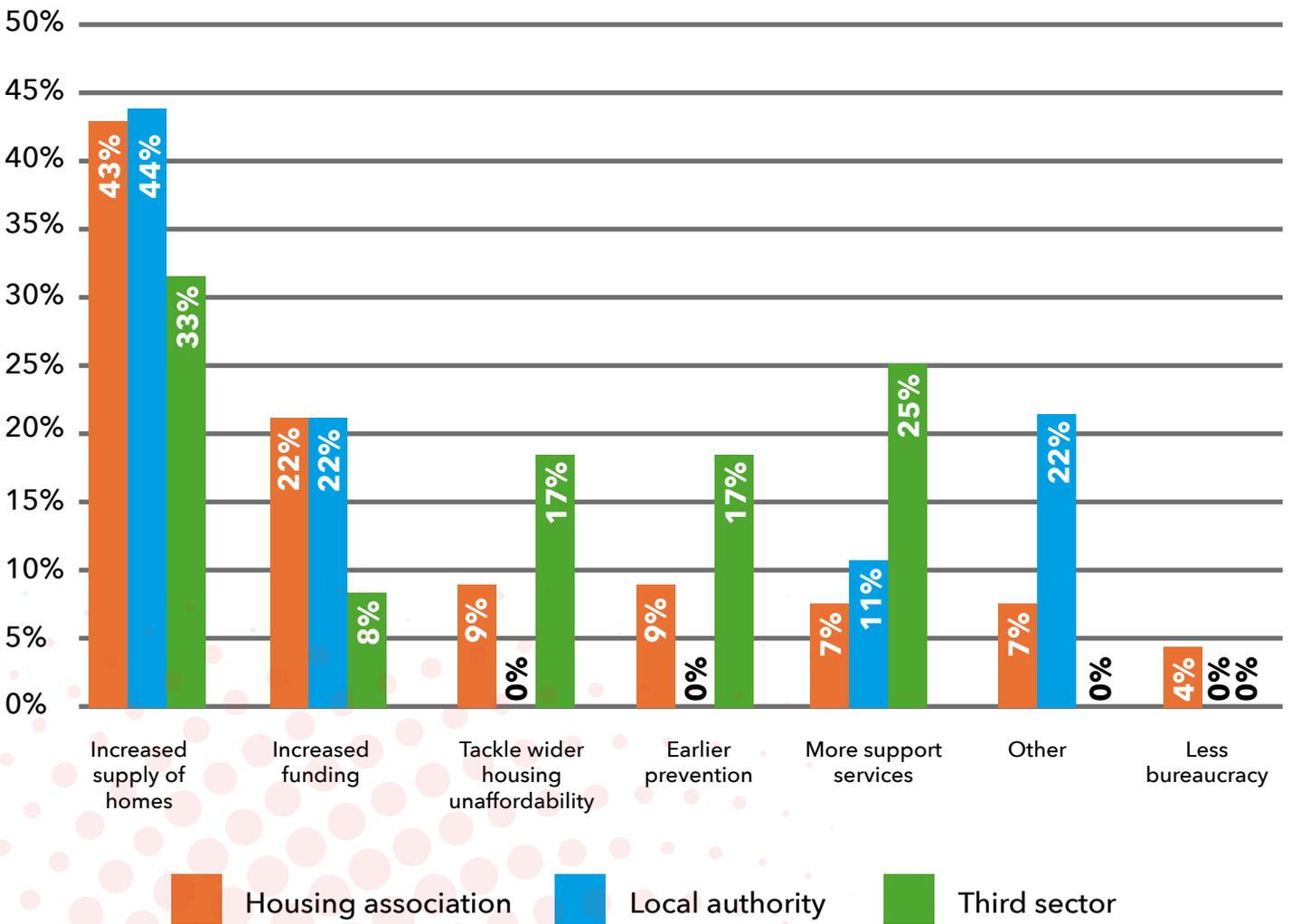
**“Given the current housing crisis that exists in Wales; with record number of homelessness and people living in temporary accommodation; the number one housing priority must be on developing and delivering more social homes across Wales.”**

## What additional measures are needed to adequately tackle homelessness in Wales?

Our 2024 sector snapshot outlined that 44 per cent of respondents saw an increase in homes as a key measure to tackle homelessness in Wales. This has been mirrored in our 2025 sector snapshot, with 42 per cent seeing an increase of homes being needed in order to tackle homelessness. Also mirroring our 2024 sector snapshot, local authorities and housing association respondents also wanted to see an increase in funding though the proportion has increased slightly. In 2024 it was 14 per cent of respondents, in 2025 it was 19 per cent of respondents. This increase in funding is related to developing more homes, providing the right level of support services and ensuring the workforce was properly resourced.

A key difference in our 2025 sector snapshot was a need to tackle housing unaffordability which was a key priority for third sector respondents, coupled with a need to prevent homelessness earlier. Figure two provides a full breakdown of the measures.

**Figure two: Additional measures needed to tackle homelessness**



**“Resources, always easy to request these things, but it is desperately needed to provide the support and provisions required. Properties are also required and there is a substantial amount of difficulties faced when building homes.”**

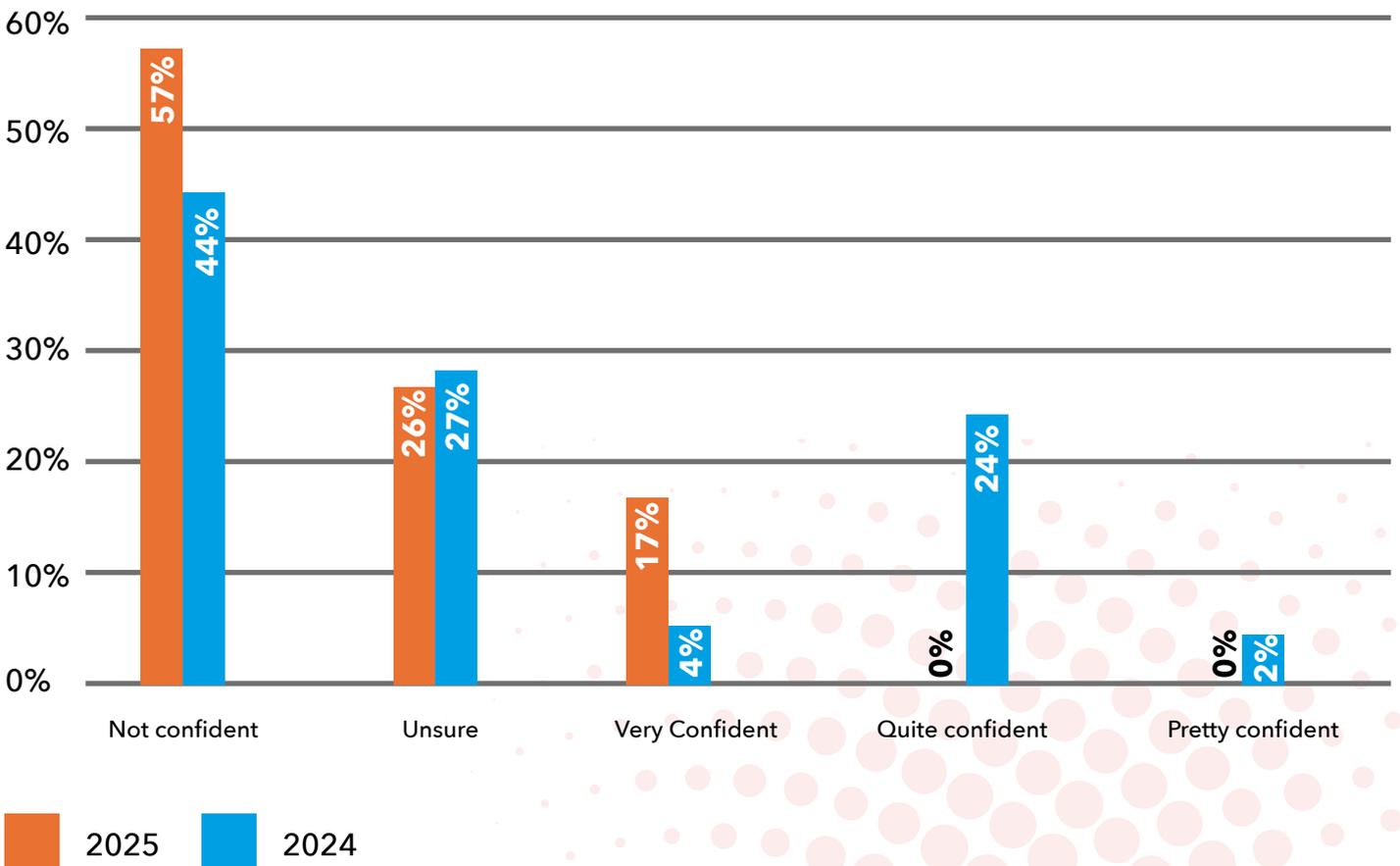
**“A greater supply of housing and a less bureaucratic process”**

**“More support to sustain tenancies. Partnership working to deliver different types of homes and more joined-up thinking about mental health support and addiction support.”**

## How confident are you in the housing sector meeting the Welsh government's target of 20,000 low carbon social homes?

As shown in figure three, the majority of respondents (83 percent) are not sure or not confident that the Welsh government's 20,000 social homes target will be met. This is higher than the 71 per cent of respondents who were not sure or not confident that the target would be met in the 2024 sector snapshot survey.

Figure three: Level of confidence in meeting 20,000 additional homes target



We have also looked at the level of confidence within housing associations, local authorities and the third sector and found that:

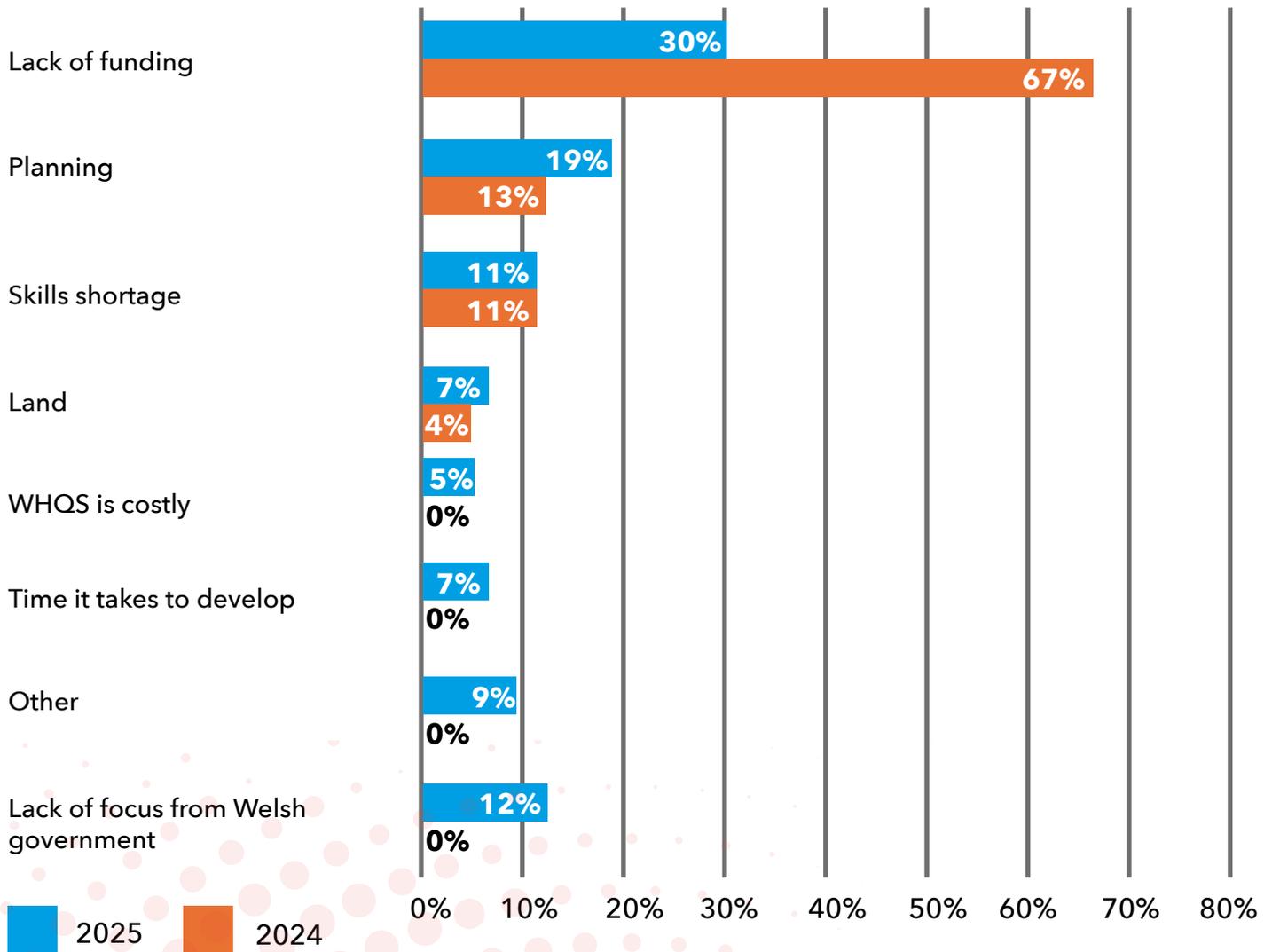
- 80 per cent of housing association respondents were not confident or unsure that the target will be met
- 100 per cent of local authority respondents were not confident or unsure that the target will be met
- 83 per cent of third sector respondents were not confident or unsure that the target will be met.

When we look at the level of seniority of respondents within their organisations, 83 per cent of respondents who were in a senior leadership position were not confident that the target would be met. In our 2024 sector snapshot it was 70 per cent of those respondents in a senior leadership position.

## The reason for level of confidence in meeting the Welsh government's target of 20,000 low carbon social homes

As the majority of respondents were not confident or unsure that the target would be met, figure four provides the reasons for this low level of confidence. As shown in figure four, in 2025, there was a wider range of reasons for respondents being not confident that the target will be met, than in 2024. Yet the main reason across both 2025 and 2024 is still insufficient funding, closely followed by planning constraints and the skills shortage. What is interesting in the 2025 responses is that just over a tenth of respondents feel that there is insufficient focus from Welsh government on overcoming the barriers to increasing development or that housing does not play a big enough role in government priorities. Figure four provides an overview of the other reasons why there is a lack of confidence in the target being met.

Figure four: reason for level of confidence in meeting 20,000 target.



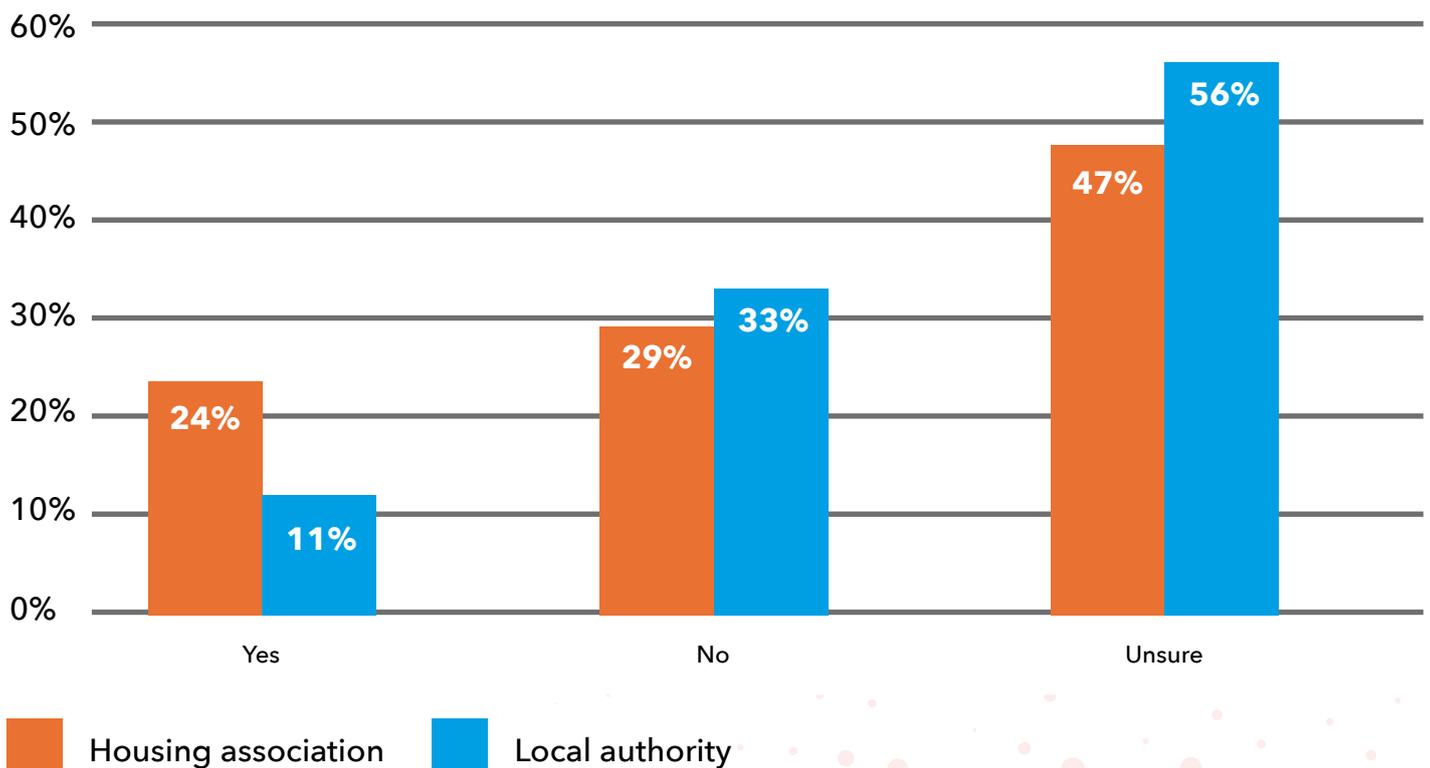
"Capital funding is insufficient to meet target, partly due to inflationary pressures in the house building sector but also insufficient to deliver our reserve schemes for another three years due to programme being fully committed. The Council's own development programme is over-committed as it is, and the costs associated with WHQS23 will further stifle development potential."

"Cost and planning. I am also concerned about how current housing stock will be upgraded when moving people to do the work may not be possible. Escalating costs of materials, and the lack of skilled engineers to do the work. Issue with time scales of being able to do works on and in existing properties. I do not believe the Welsh government fully understands the complexity of the issues."

## Are your organisation's current development and decarbonisation ambitions compatible with the current level of funding received from Welsh government?

When speaking to members, we were hearing that there were conversations being held in some organisations on whether development of new homes would need to be scaled down in order to meet the cost of retrofitting our existing homes. As a result, we added a specific question in this year's survey to establish the scale of this across the sector. The majority of third sector respondents left this question blank or were unsure of the compatibility of the ambitions. As such, our analysis for this question only considers responses from housing association and local authority respondents. As shown in figure five, we cannot make a definite conclusion due to the number of respondents who stated that they were unsure if the level of funding from Welsh government is sufficient to meet both development and decarbonisation targets.

Figure five: Are development and decarbonisation targets compatible with level of funding?



Yet despite this question not providing a definitive answer, some of the narrative provided for the previous question on confidence in meeting the 20,000 target did outline the additional pressure WHQS was creating.

**"The WHQS is a hindrance, although it's needed, the cost of building properties to this standard is excessive. There is a shortage of trades who can build low carbon homes, more should have been done 10-15 years ago to ensure the building industry in Wales was geared up for this."**

**"Capital funding is insufficient to meet target, partly due to inflationary pressures in the house building sector but also insufficient to deliver our reserve schemes for another three years due to programme being fully committed. The Council's own development programme is over-committed as it is, and the costs associated with WHQS23 will further stifle development potential."**

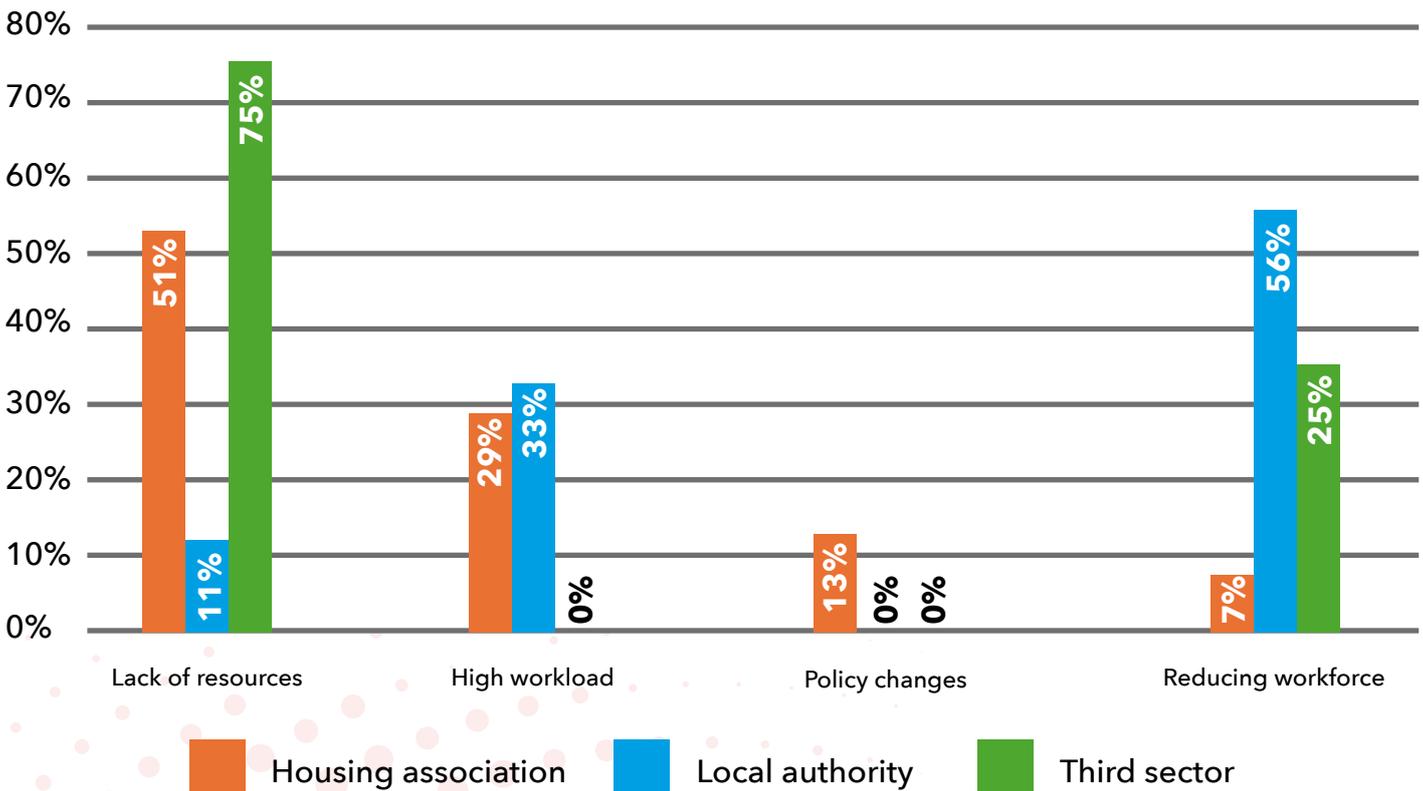
**"We do not have the funds to decarbonise our homes as required by the new WHQS there is not sufficient social housing grant available to meet our ambitions."**

## What are some of the current pressures you are facing in your role?

In 2024, the main pressure was a lack of resources and/or financial constraints, with 40 per cent of respondents citing this a pressure. This has increased to 53 per cent of respondents in 2025. A lack of resources is a significant pressure for those working in the third sector with 75 per cent of third sector respondents citing this pressure. Perhaps not surprising against a narrative of increased complexity of support needs and increasing demand for support services across Wales. For respondents working in local authorities the main pressure is a reducing workforce with 56 per cent of respondents citing this as a pressure. This was not seen as a pressure in 2024.

For respondents working in the private sector, their current pressures were also a lack of resources and a reducing workforce. Figure six provides an overview of the current pressures respondents were facing.

Figure six: Current pressures



NB As the private sector made up just one per cent of respondents, we have not included them on the chart as the proportions for this group were so small.

Unlike in 2024, no respondents stated that they were not under any pressure in their current role. This suggests that the pressure on our housing professionals has increased.

## How would you address some of these pressures?

As outlined by respondents in the 2023 and the 2024 sector snapshots, more funding and resources are needed to increase the size of the workforce. Respondents also echoed sentiments outlined in the 2024 sector snapshot that Welsh government needs to be more realistic around deadlines, for grant submissions, implementing new policies and a need to cut bureaucracy in the system.

**"Local government, Welsh government and UK government all have a different agenda, there is far too much bureaucracy in the system."**

**"Stop Welsh government continually introducing new things. Make the departments in Welsh government talk to each other so conflicting policy is not issued. Welsh government needs to allow time for things to bed down before 'tweaking them'."**

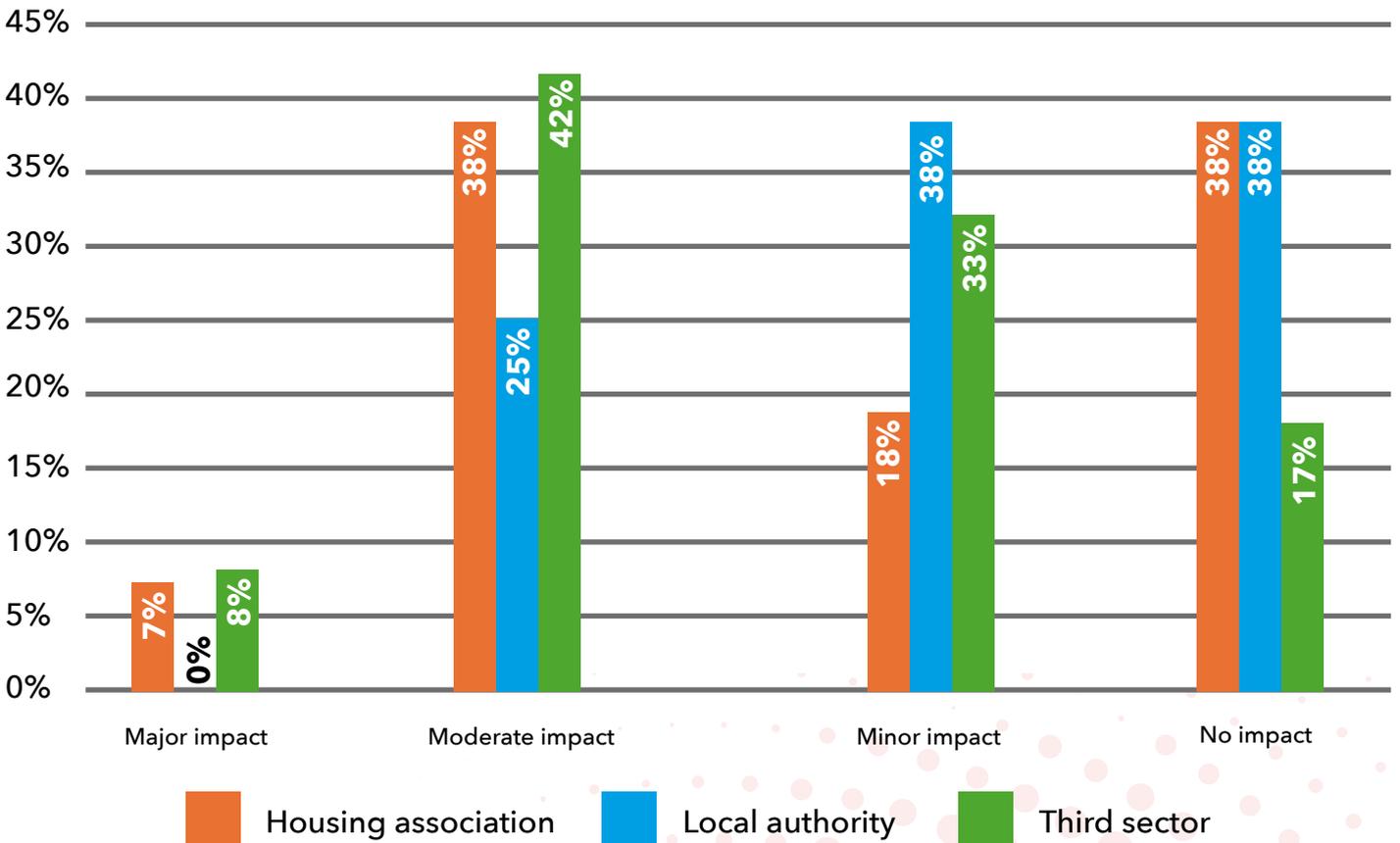
**"The whole housing system is over pressurised and substantial additional funding would be required to address the pressures listed. Forcing additional pressures on the system and on local authorities ultimately, through regulatory and imminent legislative change will only make matters worse. "**

**"The workload has always been excessive in social housing due to the reactive nature of the work that we do and the ever-changing external environment. I think that the expectation on social housing providers is ridiculous, and we have gone far beyond having to deliver traditional landlord services. Housing staff make up for the shortfall in service provision by social services, the police, the LA etc. Housing staff are left carrying multiple issues within our stock because other agencies are able to walk away. There should be far more accountability by other service providers and more collaborative working. I think the role of social housing providers in Wales should be completely reviewed and re-specified to ensure that we and all other agencies are clear about what our function actually is and not what they and our tenants think it is. The expectation is massive and ever growing and staff are being subjected to more and more abuse because they are unable to meet the expectations that have grown exponentially."**

## What impact are these pressures having on your mental health and wellbeing?

Our 2025 sector snapshot survey outlined that 66 per cent of respondents were experiencing some impact on their mental health and wellbeing as a result of the pressures they were facing. In 2024 it was 80 per cent. Even though there is some improvement in the numbers experiencing a negative impact on their mental health nearly two thirds of our housing professionals are still experiencing a negative impact on their mental health, and wellbeing due to pressures they are facing in their roles. In 2025 the negative impact was more likely for those working in a housing association, whereas in 2024 it was more likely for those working in a local authority. Figure seven provides a full breakdown.

Figure seven: Impact on mental health and wellbeing



Mirroring previous sector snapshot surveys, we also asked respondents to provide some narrative around the impact they were feeling. These centred around vicarious trauma, the impact of increased workloads and long days. Yet some commented on the positive impact a four-day week was having within their organisation.

**"The nature of front-line housing means that it can be very reactive, and workload can come in waves. There is a lot of vicarious trauma. Currently workloads are high, with some complex cases that are proving difficult to resolve and this adds pressure and affects mental wellbeing."**

**"I am considering moving out of the sector."**

**"I fire fight all day - it is absolutely exhausting there is very little positive news in my day"**

**"We are piloting the four-day week and I feel this is helping with work/home life balance."**

## Are there any other factors negatively affecting your mental health and wellbeing?

Just over a quarter of respondents (29 per cent) stated that their mental health and wellbeing was also being impacted by things outside of the workplace. These centred around cost of living pressures, family ill health and respondents' own health needs.

**"Just the cost of living in general. The pressure to own a home, do well in my job, balance a social life."**

**"Low income (according to a government website) - the role does not pay well, particularly for a single person living alone."**

## What factors are having a positive impact on your mental health and wellbeing?

Some of the common positive impacts respondents outlined were, a good team, the four-day week, when someone benefits from their support coupled with supportive friends and family outside of the workplace.

**"The four day week is helping with my mental health. A day to switch off and look after me"**

**"When a case has a successful outcome or you feel that you have done the job to the best of your ability/gone above and beyond and had a positive outcome for the customer"**

**"Having a loving husband and really good close friends. As well as working with a good, supportive team. The company is really good to work for and I feel they look after their employees."**

**"I like the fact that my work keeps me 'on my toes'. Always having to adapt, react, problem solve etc. I have a great fondness and respect for the people that I work with. They are often like-minded, and I appreciate how hard they work to try and make a difference to people's lives and to help sustain their tenancies. I am massively committed to my role and take pride in knowing that I'm doing the best job that I can. I love being able to help people and although my role is semi-strategic, I love the ability to work with tenants on the more complex cases to find positive resolutions."**

## **The UK government announced a change to the employer contributions for National Insurance in their 2024 Autumn Statement. What is the likely impact for your organisation?**

We took the decision to include this question in this year's sector snapshot due to the news coverage and feedback from members on the likely impact of this UK government decision. Some respondents quantified the cost to the business each year. This ranged from £230,000 to £2.3 million. Others provided narrative around the impact which centred on an inability to increase the workforce as needed, possible reductions in services and possible impacts on repair services.

**"Reduced budgets. No increase in staff/resources where needed"**

**"It will cost my organisation £230,000 p.a. This is very difficult to accommodate within our budgets. We would prefer to use this money to support vulnerable people and decarbonise our homes"**

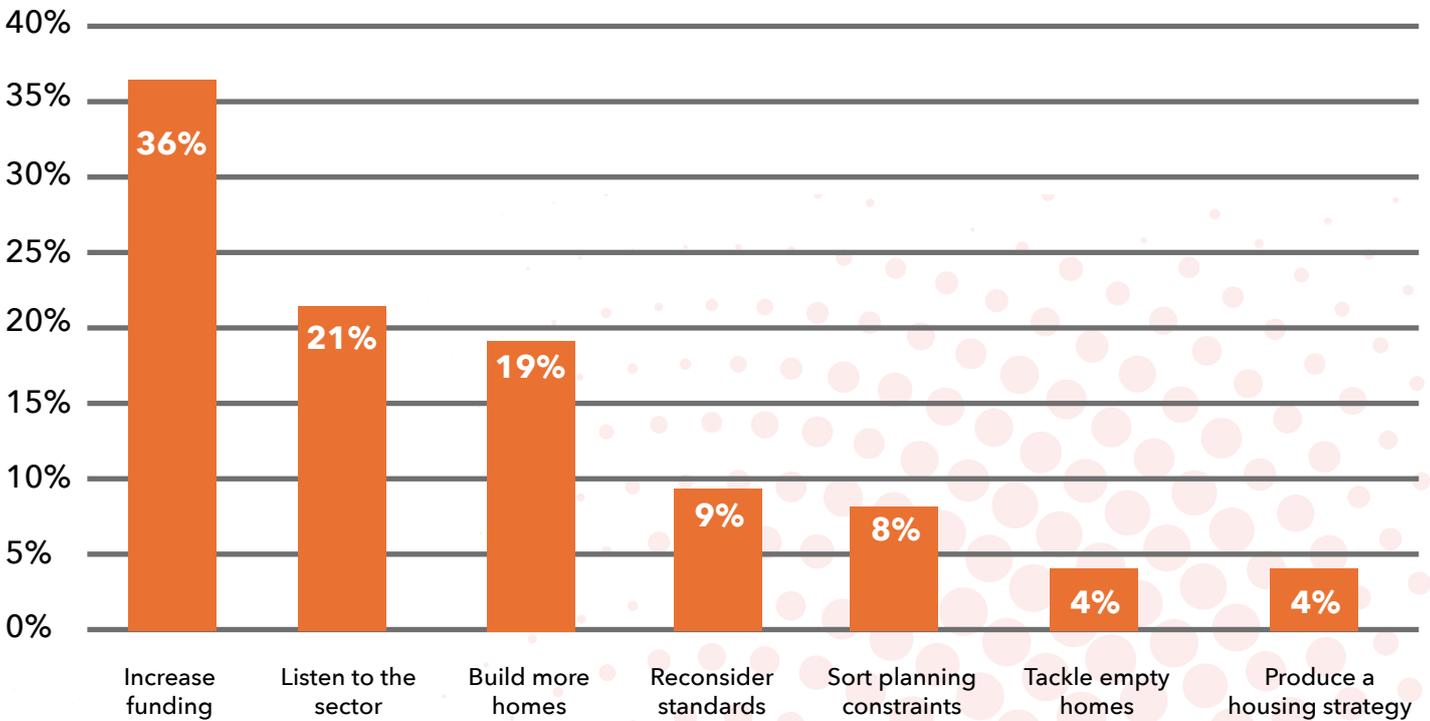
**"Our HSG support service is entirely third sector commissioned and will impact in a reduction of support services going forward increasing the potential of tenancy failure and homelessness."**

**"It places greater strain on us financially as a business and therefore reduces the service tenants receive. You always have to cut something when budget increases and this cost is also revenue, so revenue costs are cut."**

## What is the one thing you would ask the government to do in relation to housing in Wales?

As it has been repeated throughout the responses provided the top thing respondents want Welsh government to do is to increase funding to the sector. Mirroring our 2024 sector snapshot respondents also want Welsh government to listen to the sector more. A new response this year is for Welsh government to produce a housing strategy. Figure eight provides a full breakdown.

Figure eight: One thing Welsh government can do in relation to housing



“Stop bringing in well intentioned policies and targets without understanding the full implications on local authorities and housing associations. An example of this was the Renting Homes Act, which was a ‘sledgehammer to crack a nut’ approach. While with good intentions to help customers with rogue independent landlords, the impact on local authorities and housing associations, who are already heavily regulated, was and is major.”

“Look to invest more in social housing to provide good, affordable housing for those that require it”

“Work more closely with the sector experts and to hear not just listen.”

Develop a long-term housing strategy which pulls together several current and future housing priorities in Wales including developing new homes; investing in current homes; decarbonisation; compliance and safety requirements; social and affordable rent policy would provide clarity to housing providers as to how their investment plans can be shaped in future. Future development programmes through Wales could potentially be affected by WHQS2023 financial requirements. That is an example of why a long-term housing strategy would benefit the housing sector, and, most importantly, the people of Wales. The strategy should also ensure alignment across current housing legislation in Wales including WHQS 2023; Renting Homes Wales Act; Fitness for Human Habitation and the white paper on ending homelessness in Wales.

## Some reflections

The 2025 sector snapshot survey has continued to show that people work in housing to make a difference in the lives of individuals and the communities they work within. Yet despite this ambition there are ongoing pressures from a lack of resources, both monetary and time, coupled with a reducing workforce. Housing associations are continuing to feel pressure from policy changes. Respondents were clear in their responses that policy changes from government were often at a pace that could not be managed or misunderstood what would be needed to implement the policy change.

The wider impact of public sector cuts was evidenced clearly in the 2025 sector snapshot with respondents stating that housing staff are now having to make up for the shortfall in service provision. Respondents also outlined how they were also left out of conversations and that the role of housing was often ignored as summarised by one respondent:

**“Include housing in conversations with the likes of health and crime and acknowledge that housing plays an integral role.”**

The sector continues to be clear that more funding is needed to develop homes, ensure decarbonisation targets can be met and ensure the workforce is sufficiently resourced. Repeating what they asked for in 2023 and 2024.

The sector also wants the Welsh government to listen to them more closely. Another sentiment that has continued from our 2024 sector snapshot. The Ending Homelessness Action Plan includes an action to create a valued housing workforce. A key part of this is listening to the sector and acting on the concerns raised.

**“Welsh government - listen and act on feedback from the sector about legislative change.”**

People work in the housing sector to make a difference, but they need to be supported and adequately resourced to ensure that they can provide the best service they can. As put by one respondent “Housing is not just about the building, it is about the people in it”. It is time that we not only thought about providing the homes we need but ensuring our workforce is well resourced and supported to become that valued workforce that the Welsh government sees as key to ending homelessness in Wales.



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To discuss any matters relating to the work of CIH Cymru and how we can support your organisation please contact:

**Matthew Dicks**, CIH Cymru national director  
matthew.dicks@cih.org  
02475 312018

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**Liza Fleming**, CIH Cymru engagement manager  
liza.fleming@cih.org  
02475 312016

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**Cerys Clark**, CIH Cymru policy and public affairs manager  
cerys.clark@cih.org  
07939 302 566

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