



Crisis

The homelessness monitor: Wales 2025

Beth Watts-Cobbe, Glen Bramley, Rhiannon Sims, Hal Pawson, Gillian Young & Suzanne Fitzpatrick. Institute for Social Policy, Housing and Equalities Research (I-SPHERE), Heriot-Watt University; City Futures Research Centre, University of New South Wales; Newhaven Research Ltd.

Executive summary
April 2025



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The Homelessness Monitor series is a longitudinal study providing an independent analysis of the homelessness impacts of recent economic and policy developments in Wales and elsewhere in the UK. This fifth Wales-focused Monitor report provides an account of how homelessness stands in 2024 (or as close to 2024 as data availability allows), and focuses in particular on ongoing implementation of the Ending Homelessness in Wales High Level Action Plan including pursuit of extensive legal reforms, as well as the homelessness impacts of the ongoing cost of living crisis and mounting pressures in temporary accommodation. The report also includes updated modelling estimates and forward projections of 'core' homelessness.

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About Crisis

Crisis is the national charity for people experiencing homelessness. We help people directly out of homelessness, and campaign for the social changes needed to solve it altogether. We know that together we can end homelessness.

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Disclaimer: All views and any errors contained in this report are the responsibility of the authors. The views expressed should not be assumed to be those of Crisis, or of any of the key informants who assisted with this work.

Foreword



This latest edition of the Homeless Monitor for Wales comes at a key juncture for the homelessness and housing sector.

As the cost of living crisis continues and rents rise, more and more people are facing difficulties with housing insecurity and forced into the trauma of not having somewhere to call home.

Last year, the number of people living in temporary accommodation – often for months on end and without basic facilities – hit record highs. The pressure on unsuitable temporary accommodation, like Bed and Breakfast rooms is now greater in Wales than elsewhere in Great Britain.

This means more people and families struggling with the trauma and uncertainty of homelessness. It means frontline workers trying to balance increased caseloads where budgets are squeezed. And, in some cases, devastatingly, it has meant people have been forced to sleep rough.

However, this is also a time where the Welsh Government is seeking change, pressing ahead with commitments set out within the national ending homelessness high level action plan.

This monitor demonstrates that, if we are to move away from consistently firefighting with high levels of homelessness and start to turn the tide in Wales, change is imperative. Without bold action, homelessness will continue to rise.

It shows that the best chances we have of reducing homelessness is to take forward a range of policy developments – both in the Senedd and Westminster.

Using economic modelling, the report projects that policy changes in Westminster, such as raising Local Housing Allowance and ensuring that Universal Credit supports those facing destitution could have a significant impact for reducing homelessness in Wales.

It also emphasises the importance of bringing forward bold change to reduce homelessness at the Senedd. For example, illustrating the significant benefits – in the immediate, medium and long term – of taking a more consistent approach to allocations of social homes to homeless households.

This research demonstrates the importance of striving forward with the building affordable social homes and expanding Housing First support across the country.

Furthermore, it sends a clear message that we must do more to prevent people from becoming homeless in the first place. It shows that homelessness prevention is limited within the constraints of current legislation and that professionals across the sector warmly welcome current proposals for changes to the law to drive homeless prevention upstream.

However, in these difficult times, this monitor also shows that people working across local authorities are anxious about some aspects of proposals for change. Their voices are clear – reform must be accompanied by investment in housing supply and support services.

While this Monitor reinforces the need to progress many of the commitments outlined within the Welsh Government's Ending Homelessness National Action Plan and within the White Paper on Ending Homelessness – this must be supported by long-term investment and a drive that extends beyond the end of this Senedd term in 2026.

As challenging as change can be, if we do not seek policy change, the numbers of people facing the dangers of homelessness across Wales will continue to rise. We must act now to prevent homelessness in the future.

Matt Downie MBE

Chief Executive at Crisis

Chair of the Ending Homelessness National Advisory Board in Wales

To note: This research was drafted in autumn 2024 and as such, may not reflect all relevant policy developments after this time.

Executive summary

The Homelessness Monitor series is a longitudinal study providing an independent analysis of the homelessness impacts of recent economic and policy developments in Wales and elsewhere in the UK.¹ This fifth Wales-focused Monitor report provides an account of how homelessness stands in 2024 (or as close to 2024 as data availability allows), and focuses in particular on ongoing implementation of the Ending Homelessness in Wales High Level Action Plan including pursuit of extensive legal reforms, as well as the homelessness impacts of the ongoing cost of living crisis and mounting pressures in temporary accommodation. The report also includes updated modelling estimates and forward projections of 'core' homelessness.

Key points to emerge from this latest analysis are as follows:

- Wales faces a challenging social-economic context in which to address homelessness, characterised by a stagnant economy, high levels of economic inactivity, and falling living standards. Public finances are in a perilous state, with Welsh Government and local authorities facing a widening deficit. Measures to bolster incomes during the pandemic and cost of living crisis have prevented a rise in the overall rate of poverty, but destitution and child poverty are on the rise, reflecting the continuing inadequacy of the social security safety net.

- Housing construction output remains insufficient, and without additional spending will miss its target of delivering 20,000 social homes by 2026. Private rental vacancies have declined as the sector has contracted, leading to sharply rising rents, compounded by the lack of shared accommodation and one bedroom properties and the continued inadequacy of Local Housing Allowance levels despite their recent reset.
- The numbers of social lettings to new tenants have declined over the last decade but the proportion of such lettings to homeless households has increased since 2018/19, and the gap between the proportion of new lets to homeless households for local authorities (46%) and housing associations (42%) has narrowed. Despite an increase at national level, the proportion of social lets to homeless households across local authority areas remains extremely variable.
- The focus of homelessness policy in Wales has been strengthening prevention, rapid rehousing and removing barriers to housing and support, with key changes in recent years including the development and implementation of Rapid Rehousing Transition Plans and the extension of priority need to people sleeping rough. These changes have made a positive difference to homelessness responses, especially in some areas, but barriers to further impact include a lack of suitable housing options and a lack of staff capacity within local authority teams, poor data infrastructure and a lack of buy-in to the approach in some LAs.
- White Paper proposals seeking to 'End Homelessness in Wales' garnered

widespread support from local authorities and key informants, with proposals to introduce new duties to prevent homelessness on wider public bodies and the extension of the LA prevention duty to six months especially welcome. Proposals to remove or alter the tests determining access to housing assistance were supported by key informants who saw them as essential to lowering barriers to assistance, but were controversial among some LAs who felt that these changes would increase demand and diminish people's sense of personal responsibility to resolve their own housing needs. Funding, more access to suitable housing, appropriately phasing implementation, securing buy-in from wider public services and creating culture change within local authorities were identified as the required enablers of implementation of these proposals should they progress into legislative change.

- Notwithstanding measures to improve responses, estimated levels of rough sleeping rose by 86% in the three years to July 2024. A key driver has been the unlawful failure of some local authorities to accommodate some homeless households in the context of acute pressures on temporary accommodation. Prison leavers and those with No Recourse to Public Funds are seen to be at particular risk of sleeping rough.
- The flow of homeless households subject to local authority prevention or relief duties has remained fairly level for the last few years, standing at 12,939 in 2023/24. Other statutory homelessness data reveal a system under strain. Since 2018/19, the proportion of prevention and relief actions judged successful has declined substantially and temporary accommodation use now stands at a record high, having increased by 189% in the three years to March 2024. Placements in B&B accommodation overall and for families have risen astronomically, with B&B now the dominant form of TA provided in Wales and the country more reliant on unsuitable forms of TA than either England or Scotland.

- Key factors explaining these acute pressures in the statutory homelessness system include a very challenging structural and housing market context limiting local authorities' ability to prevent evictions from or secure access to appropriate private rented housing, alongside the ongoing impacts of the COVID-19 pandemic and the more inclusive response to homelessness it prompted. Local authorities are reported to be in 'crisis management mode' restricting their capacity to pursue proactive prevention or other transformative policy agendas.
- In 2022, overall core homelessness in Wales is estimated to have stood at 12,250 households. Rates of core homelessness in Wales are lower than in England (0.9% compared to 1.01%), although they have risen more sharply in Wales than in either England or Scotland (where rates are lowest at 0.62%). Assuming a continuation of current policies (i.e. not including proposals for wide ranging legislative change), increases in core homelessness will persist in the short to medium term (to 2031), and rise faster in the longer term (2031-41).
- According to our modelling, effective policies for reducing core homelessness in the immediate term include:
 - increasing the share of social lettings allocated to homeless households
 - raising Local Housing Allowance rates, and
 - making changes to Universal Credit and other benefits to reduce destitution.
- Over the longer term, increased targeted new social housing supply, successful balancing up of the Welsh economy, and increased provision of Housing First are also projected to have a positive impact.
- There is widespread support among stakeholders for proposed legislative reforms that seek to move homelessness prevention measures upstream - including the extension of the prevention duty to 6 months and the proposals for new public sector duties. This appetite for further legislation on homelessness prevention is

¹ Parallel Homelessness Monitors are published for England and Wales. All of the Homelessness Monitor reports are available from <https://www.crisis.org.uk/ending-homelessness/>

perhaps reinforced by our modelling which suggests that prevention measures within the confines of existing legislation are limited.

- A comprehensive and appropriately sequenced policy reform programme is modelled as capable of reducing core homelessness in Wales by half against our baseline scenario by 2041. This scenario would see core homeless rates 22% below the level of 2019. Furthermore, unsuitable temporary accommodation would be down by 83%, hostels by 54%, rough sleeping would be reduced by 45%, and sofa surfing down by 39%. There would also be some reductions in wider measures of statutory homelessness (16%) and in total temporary accommodation (18%), despite the significant widening of eligibility for homelessness support associated with the ending of priority need.

The wider context

Since the pandemic, the Welsh economy, like that of the UK, has stagnated and economic inactivity has increased, especially in Wales, as people exit the labour market due to ill health. Various post-pandemic economic shocks, most significantly the spike in inflation and the resulting sharp rise in interest rates, have seen living standards drop.

Elevated levels of net public debt and taxation, partly to help pay for the costs of supporting businesses and households through the pandemic and cost of living crisis, plus 14 years of public sector austerity, have left public finances in a perilous state. Having boosted the Welsh Government's budget by £1.7bn for the current financial year and 2025/26, the new UK Labour Government's 2024 Autumn Budget should somewhat ease Welsh Government and local authority funding pressures and the risk of unsustainable deficit in the shorter term. In the longer term, the 2025 UK Spending Review should clarify how the currently anticipated tightening of public spending from 2026/27 is to be achieved in terms of which policy area budgets will be most affected. Measures to bolster incomes during the pandemic and cost of living crisis have prevented a rise in the

overall rate of poverty. However, other policy decisions, particularly the imposition of the two-child limit in 2017, have led to a sharp rise in households with three or more children living in poverty. Likewise, decisions that have reduced the real value of benefits, tightened benefit sanctions, and limited access to discretionary funding, especially for those with no recourse to public funds, have seen destitution rise. Whilst still lower than the GB average, the rate of destitution in Wales has risen more sharply than in many other areas of GB since 2017.

Given the limitations of the wider social security safety net, discretionary localised forms of support, particularly Discretionary Housing Payments and the Discretionary Assistance Fund, are very important in helping LAs in Wales prevent and address homelessness, albeit that the nature of these funds mean that people receive inconsistent help and that their effectiveness is limited by budgetary constraints and rules restricting how they can be used.

Too few private market and affordable homes are being built in Wales. Sector stakeholders welcome the Welsh Government's ambitious 2021-26 target to deliver 20,000 social homes and recognise the significant capital investment budgeted to achieve it. However, the £235m capital (covering all policy areas) included in the £1.7bn additional Barnett consequential funding announced in October falls well short of the additional investment - £580m-£740m on top of existing budget - Audit Wales says is required to achieve this target.

Private rental vacancies have declined as the sector has contracted, though it's unlikely legislative changes implemented from December 2022 to strengthen tenants' rights and raise property standards have been a key factor. The shortage of vacancies has led to a sharp rise in private rents, compounded by the lack of shared accommodation and one bedroom properties. The end of a four year freeze in Local Housing Allowance levels, which were reset to the 30th percentile of local rents was welcomed by LAs and somewhat eased affordability pressures for low-income private renters, but this has been short lived following the UK Government's

decision to reimpose a freeze for 2025/26. LAs also report that the role of the Local Housing Allowance in addressing homelessness is limited by the shortage of private lets, especially one bedroom units, and the high rents being set for properties available for let relative to Local Housing Allowance rates across Wales.

The Welsh Government has sought to raise standards across the rented sector, including via the Renting Homes (Wales) Act, in force since late 2022. Alongside a raft of other provisions, it introduced a twelve-month minimum residency period and extended notice periods for most tenancies to six months. The full impacts of the Act are subject to ongoing evaluation, but LAs are concerned that it has led to landlord disinvestment, driving up homelessness and making it harder to resolve. Evidence from across the UK, however, suggests housing market conditions, the aging profile of landlords, taxation policies as well as tighter regulation have all contributed to the decline of private tenancies. Some key informants also say the Act has strengthened their hand in advocating for tenants' rights. Claims for accelerated repossession dropped back in 2023, driven by a sharp drop in the use of 'no fault' evictions notices following the change in the notice period from two to six months in December 2022.

Looking ahead, the White Paper on securing a path towards adequate housing, issued for consultation in late October 2024, centres on the potential for a national housing strategy and proposals to improve the affordability, accessibility and habitability of private lets alongside the collection and use of private rental data. These themes were echoed in the Senedd's Local Government and Housing Committee's Private Rented Homes Review published earlier the same month, though it also called for a review of 'no-fault' evictions in light of recent progress to secure legislation to end such evictions in England.

The numbers of social lettings have also fallen back since 2013/14, albeit at a much slower rate than in England, where the Right to Buy remains in operation. There has been a marked increase in social lettings to homeless households in Wales since 2018/19 and the

gap between the proportion of new lets to homeless households for local authorities (46%) and housing associations (42%) has narrowed. Proposals to improve nominations and housing support for homeless households may see this gap narrow further. That said, there remains a great deal of variation in the proportion of new lets to homeless households across Wales, with the rate ranging from under 20% to over 70% at local authority area level. There has also been little or no increase in the proportion of social lettings to homeless households in a handful of local authority areas since 2018/19. LAs report that the lack of suitable, especially appropriately sized, stock is a key barrier to increasing allocations to homeless households but were split on whether housing association lets to this group are high enough. Key informants were clear, however, that housing association allocations to this group remain far too low in some areas.

Homelessness policy

The focus of homelessness policy in Wales on strengthening prevention, rapid rehousing and removing barriers to housing and support was widely endorsed by sector stakeholders. Barriers to its implementation include poor data infrastructure and a culture in LAs that is at odds with the strategic direction, as well as demand and resource pressures.

The extension of the priority need category to include people who are street homeless, cementing changes introduced during the pandemic, was recognised to have improved responses to rough sleeping and is welcomed by many as the "right thing to do". However, in a pressurised wider context the change has exacerbated housing pressures for LAs and redirected their focus onto crisis responses and temporary accommodation management. Some LAs are concerned that the shift to include those who are street homeless as in priority need has widened the scope for exploitation of the legal safety net.

The majority of LAs report that well-developed Rapid Rehousing Transition Plans are in place and these plans appear to be starting to positively impacted responses to homelessness in many areas,

including via increased access to settled housing, improvements in partnership working and changes in the profile of temporary accommodation used. Meanwhile, stakeholders outline that barriers to progressing Rapid Rehousing Transition Plans include lack of access to suitable (especially one-bed) accommodation, a lack of buy-in to the agenda on the part of LAs and wider partners, and acute service pressures and limited resources.

Housing First operates in the majority of LA areas in Wales, and achieves high tenancy sustainment rates, but levels of provision are insufficient to meet demand in around half of the LAs in which it operates. Key barriers to scaling up provision and ensuring its fidelity to Housing First principles are a lack of suitable accommodation and insufficient support capacity.

There is considerable scope to further strengthen partnership arrangements supporting LA responses to homelessness. Existing partnerships are strongest with housing associations, though practice varies substantially, with some continuing to 'cherry pick' tenants. Partnerships with social services, criminal justice and health are in place to some degree in a majority of LAs areas but often depend on personal relationships rather than embedded practices. Partnerships with schools and education services appear weakest, though it should be noted that these are areas of policy and practice development under proposals for the upcoming Ending Homelessness Bill.

The Housing Support Grant saw an uplift of £13 million in 2024/25 after a three-year freeze. According to most LAs this will enable homelessness services to be maintained at current levels, but will not enable enhancements in service provision despite acute service pressures. A majority of LAs report challenges recruiting and retaining staff with the required skills within LA homelessness services and commissioned services, driven by high workloads, low remuneration and a lack of recognition of the contribution of the workforce.

The overall package of proposals in the White Paper on Ending Homelessness in Wales garnered widespread support from LAs and key informants. Elements of the proposals that were particularly welcomed include the introduction of new duties to prevent homelessness on wider public bodies and the extension of the LA prevention duty to six months. Proposals to remove the intentionality test and soften local connection rules were welcomed by key informants but controversial among LAs who are concerned they will increase demand and diminish people's sense of personal responsibility for resolving their own housing needs. Funding, more access to suitable housing, appropriately phasing implementation, securing buy-in from wider public services and creating culture change within local authorities were identified as the required enablers of implementation.

Trends in rough sleeping and statutory homelessness

Estimated levels of rough sleeping rose by 86% in the three years to July 2024. Key drivers have included the unlawful failure of some LAs to accommodate some homeless households in the context of acute pressures on temporary accommodation. Prison leavers and those with No Recourse to Public Funds are seen to be at particular risk of sleeping rough.

Having peaked in 2019/20, the flow of homeless households subject to local authority prevention or relief duties fell back slightly in 2020/21 and has subsequently remained fairly level, standing at 12,939 in 2023/24. There is a lack of statutory data available on the profile of households facing homelessness in Wales or its triggers, though efforts are underway to improve this. Our LA survey indicates widespread perceptions of 2023/24 increases in demand from people with complex needs, single adults and those leaving prison.

Since 2018/19, the proportion of prevention and relief actions judged successful has declined, from 68% to 58% of prevention duty outcomes and from 41% to 26% of relief outcomes. These trends are seen to be driven by LA capacity being diverted from prevention

and relief efforts to crisis management and by a very challenging structural and housing market context, limiting LAs ability to prevent evictions from the private rented sector and secure appropriate and affordable alternative housing.

As a result of the declining efficacy of prevention and relief interventions, alongside the extension of priority need, the number of households owed the Main Rehousing Duty has rapidly escalated in recent years – doubling over the period 2019/20-2023/24. The majority of such households are 'positively discharged' into secure housing, though around a fifth do not secure this outcome, and instead lose contact with services.

Only a very small number of households are now excluded from the Main Rehousing Duty on the basis of being judged not in priority need or homeless intentionally. In 2023/24 only 90 households were excluded from rehousing on this basis, 5% the number impacted in 2018/19. Nevertheless, single people continue to be over-represented among those not substantively or effectively helped via the statutory homelessness system.

Total temporary accommodation placements grew by 189% in the three years to March 2024, from 2,232 to 6,444. B&B placements rose fivefold (452%) to 2,730 from only 495. Since 2017, such placements have risen well over tenfold. The number of families (as opposed to single people) in B&B hotels has also escalated, from 33 to 408 over the three years to March 2023 – again, more than a tenfold increase.

The key drivers of these dramatic surges in temporary accommodation use are the impacts of the COVID-19 pandemic and the more inclusive response to homelessness it prompted, alongside a challenging housing market context, and in particular increasing challenges accessing appropriate private rented sector accommodation. While access to social housing – in particular housing

association accommodation - seems to have improved in many areas, two thirds (11 of 16) of LA survey respondents reported a decline in access private rented accommodation for homeless households in the last year. Single people, those with complex needs, and prison leavers are especially difficult to accommodate.

As a result of these temporary accommodation pressures, some LAs are routinely failing to accommodate those owed a duty, relying on poor quality temporary accommodation, and increasingly resorting to out of area placements. Lengths of stay are increasing, and inadequate support is fuelling management challenges, evictions, repeat homelessness and rough sleeping. These pressures are straining staff capacity and wellbeing, as well as LA budgets.

Core homelessness

In 2022, overall core homelessness in Wales is estimated to have stood at 12,250 households². This overall figure is made up of 6,550 people sofa surfing, 2,600 in unsuitable temporary accommodation, 2,270 in hostels etc., 600 in unconventional accommodation and 250 rough sleeping. These numbers have risen sharply since 2019 driven mainly by responses to the COVID-19 pandemic followed by the cost of living crisis.

Rates of core homelessness in Wales are lower than in England (0.9% compared to 1.01%), although they have risen more sharply in Wales than in either England or Scotland (where rates are lowest at 0.62%). Wales now has relatively more households in unsuitable temporary accommodation than the other two countries, and more of all categories of core homelessness than Scotland, with the exception of rough sleeping.

² Core homelessness numbers are estimated for base year, in this instance FY 2022/23 ('2022' for short), drawing on many sources of data and in some cases modelled estimates. Some of these sources entail significant time lags between the time period they refer to and their becoming available, and the analysis involved in this instance was undertaken in spring and summer of 2024.

Assuming a continuation of current policies, increases in core homelessness will persist in the short to medium term (to 2031), and rise faster in the longer term (2031-41). However, several important policy developments are in progress or under consideration in Wales, which are likely to alter this trajectory.

According to our modelling, the most effective policies for reducing core homelessness are increasing the share of social lettings allocated to homeless (including core homeless) households, raising Local Housing Allowance rates, and making changes to UC and other benefits to reduce destitution.

In the longer term, in addition to the above housing allocations, Local Housing Allowance, and welfare measures, other scenarios are modelled to significantly reduce core homelessness, including increased targeted new social housing supply, successful balancing up of the Welsh economy, and increased provision of Housing First accompanied by appropriate rehabilitation provision and a reduction of traditional hostel accommodation.

A comprehensive and appropriately sequenced programme of policy change is shown to be capable of reducing core homelessness in Wales by half against our baseline scenario by 2041. This scenario would see core homeless rates 22% below the level of 2019. Furthermore, unsuitable temporary accommodation would be down by 83%, hostels by 54%, rough sleeping would be reduced by 45%, and sofa surfing down by 39%. There would also be some reductions in wider measures of statutory homelessness (16%) and in total temporary accommodation (18%), despite the significant widening of eligibility for homelessness support associated with the ending of priority need.

Conclusions

The main stories to emerge from this edition of the Homelessness Monitor: Wales are of pressures mounting on local authority homelessness services in the context of continued efforts to drive forward more preventative, inclusive and housing-led responses. These pressures are particularly apparent in relation to temporary accommodation, with placement levels at a record high and leading to a host of negative impacts both for those facing homelessness and for local authorities. Local authorities' reducing ability to effectively prevent or relieve homelessness is another key marker of a strained system and difficult housing market context. The policy agenda being pursued in Wales is directly focused on reducing temporary accommodation pressures and enhancing local authorities' capacity to effectively prevent and respond to homelessness, and received widespread support for stakeholders, but there is no doubt that the ambitious forthcoming Housing Bill will land at a time when LAs feel acutely ill-resourced to implement new approaches and take on further responsibilities without significant support from wider agencies and further investment.

The next Wales-focused edition of the homelessness monitor will provide an opportunity to review how the ambitious policy agenda on homelessness in Wales is playing out, and the extent to which the challenges identified have been overcome. It will also enable a reflection on the impact of significant changes in homelessness policy in Wales as well as the change of political leadership at the UK level and following the 2026 Senedd election. Key questions are whether the political priority given to homelessness in Wales continues and whether the new UK Government decides to take a different approach in homelessness-relevant reserved policy areas including social security.

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