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# CMA Leaseholder Survey 2014

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# **1 Introduction and methodology**



# 1 Introduction and methodology

## 1.1 Background and objectives

Following publication of its Scoping Paper<sup>1</sup> on the Residential Property Management Services (RPMS) study<sup>2</sup> at the end of 2013, the Competition and Markets Authority (CMA)<sup>3</sup> wanted to use survey research of leaseholders to support its market study (launched March 4<sup>th</sup> 2014), the primary objective being to examine whether there were barriers to RPMS working well for consumers. The requirement was to survey several distinct groups of leaseholders across England and Wales.

Having sought views on the scope of the study, the OFT decided to widen its investigation to include residential property management services for properties where local authorities and housing associations are the freeholders, as well as those with private sector freeholders. These were brought within scope because of similarities in the concerns expressed by respondents in relation to the provision of property management services to leaseholders in local authority (LA) and housing association (HA) properties.

The survey was intended to inform an assessment of consumers' dealings with property managers (often known as managing agents) and freeholders, value for money, satisfaction with overall service, whether and how consumers are seeking redress if they have a problem, as well as their experiences of switching property managers.

In addition, the CMA wanted the survey to enable assessment of the following:

- Whether leaseholders in developments that have set up a Right to Manage Company (RTMC)<sup>4</sup> or are managed by a Residents' Management Company (RMC)<sup>5</sup> are able to secure better service provision and value for money than where a freeholder acts on their behalf.
- Whether certain groups are more vulnerable, in the sense that they will be more likely to be impacted if service charges rise suddenly or are less likely to be able to challenge poor service.

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<sup>1</sup> <https://assets.digital.cabinet-office.gov.uk/media/53355cdf5274a571e000011/OFT1513s.pdf>

<sup>2</sup> <https://www.gov.uk/cma-cases/residential-property-management-services>

<sup>3</sup> The CMA acquired its powers on 1 April 2014 when it took over many of the functions of the Competition Commission (CC) and the Office of Fair Trading (OFT).

<sup>4</sup> A RTMC is formed when a group of leaseholders of flats take control of the management of the development they live in and appoint their own managing agent without having to buy the freehold, see Glossary at Appendix B,

<sup>5</sup> A limited company owned by the leaseholders of a development that has legal responsibility to provide residential property management services and the right to collect service charges.

- Whether the experiences and views of owner occupiers in retirement developments are different from other leaseholder groups.
- The comparative experiences and views of those leaseholders living in developments owned by LAs and HAs and those in the private sector.

Ipsos MORI was commissioned in April 2014 to carry out the survey on behalf of CMA.

## 1.2 Groups of interest

The CMA identified seven groups of interest for the research, outlined in Figure 1.2.1 below. The key characteristics of these groups included whether they are owner occupier or buy-to-let<sup>6</sup> leaseholder, whether or not they have exercised their Right to Manage (RTM)<sup>7</sup> or are in developments managed by an RMC. Other characteristics include whether the freehold of the property is held privately or by a registered social landlord (LA or HA) and whether or not the property is in a retirement development. A retirement development is likely to be in a specialist development and only available to be purchased by an individual over a certain age, typically 55. Prior to fieldwork, these seven groups of interest were subsequently expanded into ten individual groups, as Table 1.2.1 outlines.

Figure 1.2.1 – Leaseholder groups of interest

- Owner occupiers in the private sector but not retirement developments, who do not belong to the RTMC/RMC group;
- Owner occupiers in the private sector but not retirement developments, who do belong to the RTMC/RMC group;
- Buy-to-let leaseholders in the private sector but not retirement developments, who do not belong to the RTMC/RMC group;
- Buy-to-let leaseholders in the private sector but not retirement developments, who do belong to the RTMC/RMC group;
- Owner occupiers in LA developments, but not retirement developments;
- Owner occupiers in HA developments, but not retirement developments;
- Owner occupiers in retirement developments.

The requirements for the survey also identified criteria for those in and out of scope. Figure 1.2.2 below quotes direct from the Statement of Requirement (SoR).<sup>8</sup>

<sup>6</sup> For the purposes of this survey this phrase is used to denote all cases where the leaseholder is not resident but lets the property to tenants whether or not originally bought for that purpose.

<sup>7</sup> A group right for leaseholders of flats to allow them to take control of the management of the development they live in and appoint their own managing agent without having to buy the freehold.

<sup>8</sup> SoR appended in Appendix A.

Figure 1.2.2 – Details of those who are out of scope

- Property developments which are primarily commercial.
- Property developments without common areas, or where only the grounds are common and require maintenance.
- Properties that are not within the definition of property units e.g. houses and bungalows, even if leasehold/using a property manager.
- Leaseholders who maintain the development themselves or other circumstances where a property manager is not contracted to arrange this.
- Tenants of any description.
- Those who are effectively acting as a business in respect of their ownership of leasehold property units. Where more than one property unit is owned by a leaseholder in scope, the questionnaire will need to be designed to target a specific property unit.
- Friends or relations of the leaseholder, unless also a leaseholder of the selected property in their own right.

Table 1.2.1 – Groups of interest

Groups of interest – Original		Groups of interest – Final	
A	Private owner occupier - non RTMC/RMC	A	Private owner occupier - non RTMC/RMC
B	Private owner occupier - RTMC/RMC	B	Private owner occupier - RTMC/RMC
C	Private buy-to-let - non RTMC/RMC	C	Private buy-to-let - non RTMC/RMC
D	Private buy-to-let - RTMC/RMC	D	Private buy-to-let - RTMC/RMC
E	Owner occupier LA	E1	Owner occupier LA - TMO and non-TMO
		E2	Buy-to-let LA - TMO and non-TMO
F	Owner occupier HA	F1	Owner occupier HA - RTMC/RMC and non-RTMC/RMC
		F2	Buy-to-let HA - RTMC/RMC and non-RTMC/RMC
G	Owner occupier – retirement development	G1	Owner occupier – retirement development
		G2	Buy to let – retirement development

### 1.3 Key challenges

The requirements for this study and the nature of the target audience presented a number of challenges when designing and conducting the survey. The low numbers in the target population we wanted to survey (about which very little was known), the lack of a comprehensive sample source covering all of the underlying groups of interest, and budget and time considerations were pivotal in shaping the final survey methodology.

Table 1.3.1 provides an overview of these key challenges. Of greatest significance is the estimated low incidence level of the target audience, in particular when combined with the lack of profile information. The selected survey methodology was intended to overcome these challenges in the most efficient and effective way possible, balancing the various requirements for the survey. It should be noted that, inevitably, there was no perfect solution and compromises were necessary to complete the survey.

**Table 1.3.1 – Key challenges overview**

Challenge	Detail	Consequence
Low incidence target population <sup>9</sup>	Estimated incidence rate of between 5% and 10%. No comprehensive information source on which to base this estimate.	Increases the difficulty of completing sufficient interviews and therefore the overall cost of the survey.
Lack of available profile information	No comprehensive source of profile information for the target audience overall or key sub-groups.	Impossible to know what representative means and difficult to set targets other than to achieve a “good mix”.
No comprehensive sample source	No source of contact or location details for the overall target audience, and very limited sources for key sub-groups.	In combination with low incidence rate, this makes this a very hard (and costly) to reach key sub groups.
Complex sub-group requirements	The number of groups of interests being targeted, and in particular the restriction on eligibility that accompany these, adds complexity to the requirements.	The difficulty of estimating the incidence of these groups within the target audience overall, and no profile information, makes setting/achieving targets problematic.
Time limitations	Total time available for design, fieldwork and reporting of only 13 weeks.	This time limit ruled out some methodologies and made piloting (recommended by Ipsos MORI) very difficult to accommodate.
Budget considerations	Survey cost must come within CMA's available budget.	Budget considerations limited the available methodologies, in particular ruling out a random digit dialling approach (with further implications for the limitations of the survey findings).

<sup>9</sup> Explored in more detail in section 1.4.

## 1.4 Estimating the incidence of target groups

One pivotal factor in the choice of methodology was the estimated incidence of the target population overall and the specific groups of interest. In Ipsos MORI's experience, leaseholders are not generally a 'hard-to-reach' group or difficult to engage in research<sup>10</sup>. However, understanding the incidence level of the target audience for the survey was crucial to selecting the most appropriate methodology given CMA's research objectives, timescales and budget.

As the Leasehold Knowledge Partnership/Carlex report cited in CMA's SoR highlights: "to date, there is not agreement over the size of the leasehold sector in England and Wales". Estimates within that report, based on Census data, placed the leasehold market in England and Wales at 5.37 million properties (circa 21% of properties overall), based on the overall figure for flats, maisonettes and apartments. For the CMA survey the target audience is smaller given the requirement for leaseholders to be in receipt of residential property management services for a flat, apartment or maisonette, looking at the subset of properties where the leasehold is privately owned and excluding those rented in the social sector.

Using 2011 Census data, Ipsos MORI calculated that owner occupied non-commercial flats, maisonettes or apartments (a proxy for owner occupier leaseholders) account for around a quarter (26%) of all residential flats, apartments and maisonettes in England and Wales. However, this is just five percent of properties overall. So for five of the seven groups of interest<sup>11</sup>, the incidence rate was estimated as being at least as low as five percent, but potentially lower given the additional eligibility criteria.

Estimating the incidence rate for the other two groups of interest (both buy-to-let leaseholders)<sup>12</sup> was further complicated as the Census and other sources of profile information (such as the English Housing Survey) typically record the personal tenure of the respondent. This means that buy-to-let leaseholders could feature within any tenure type and so are difficult to isolate and estimate incidence levels for. As the target property for the CMA survey (i.e. the property for which they are a leaseholder but in which they do not live) would likely be in the private rented sector, using Census 2011 data Ipsos MORI estimated that buy-to-let leasehold properties account for up to six percent of properties overall in England and Wales.

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<sup>10</sup> This is despite response rates typically being lower among leaseholders relative to general tenants in Ipsos MORI's experience of conducting research within the social housing sector on behalf of Registered Providers.

<sup>11</sup> Groups A, B, E, F and G (owner occupier leaseholders) from the original seven groups outlined at Table 1.2.1, but not restricted to those in receipt of residential property management services.

<sup>12</sup> Groups C and D in Table 1.2.1 but not restricted to those in receipt of residential property management services. See SoR at Appendix A.

These estimates placed the incidence of the target overall as, at best 1, in 10, but likely much lower given the eligibility criteria already discussed. Table 1.4.1 presents 2011 Census figures for England and Wales for accommodation type within tenure type, used to estimate incidence rates for the survey target population.

Table 1.4.1 – 2011 Census data – accommodation type within tenure type

	All households	Owned or shared ownership: Total	Owned: Owned outright	Owned: Owned with a mortgage or loan or shared ownership	Social rented: Total	Social rented: Rented from council (Local Authority)	Social rented: Other social rented	Private rented or living rent free: Total	Private rented: Private landlord or letting agency	Private rented: Other private rented or living rent free
<b>All categories: Accommodation type</b>	<b>23,366,044</b>	<b>15,031,914</b>	<b>7,206,954</b>	<b>7,824,960</b>	<b>4,118,461</b>	<b>2,208,080</b>	<b>1,910,381</b>	<b>4,215,669</b>	<b>3,566,467</b>	<b>649,202</b>
Whole house or bungalow: Total	18,374,535	13,717,312	6,623,716	7,093,596	2,263,774	1,250,228	1,013,546	2,393,449	1,936,490	456,959
Whole house or bungalow: Detached	5,311,152	4,725,683	2,645,644	2,080,039	137,113	78,079	59,034	448,356	329,539	118,817
Whole house or bungalow: Semi-detached	7,305,250	5,308,006	2,496,423	2,811,583	1,137,853	662,422	475,431	859,391	674,895	184,496
Whole house or bungalow: Terraced (including end-terrace)	5,758,133	3,683,623	1,481,649	2,201,974	988,808	509,727	479,081	1,085,702	932,056	153,646
Other: Total	4,991,509	1,314,602	583,238	731,364	1,854,687	957,852	896,835	1,822,220	1,629,977	192,243
Other: Flat, maisonette or apartment in a purpose-built block of flats or tenement	3,763,947	939,904	409,494	530,410	1,690,834	896,798	794,036	1,133,209	1,012,469	120,740
Other: Flat, maisonette or apartment that is part of a converted or shared house (including bed-sits)	920,451	265,517	90,901	174,616	147,410	52,197	95,213	507,524	472,764	34,760
Other: Flat, maisonette or apartment in a commercial building, or mobile/temporary accommodation	307,111	109,181	82,843	26,338	16,443	8,857	7,586	181,487	144,744	36,743
<i>Residential (non-commercial) flats, maisonettes or apartments</i>	<i>4,684,398</i>	<i>1,205,421</i>	<i>500,395</i>	<i>705,026</i>	<i>1,838,244</i>	<i>948,995</i>	<i>889,249</i>	<i>1,640,733</i>	<i>1,485,233</i>	<i>155,500</i>
<i>% of tenure type</i>	<i>20%</i>	<i>8%</i>	<i>7%</i>	<i>9%</i>	<i>45%</i>	<i>43%</i>	<i>47%</i>	<i>39%</i>	<i>42%</i>	<i>24%</i>

Owner occupied residential flats	1,205,421	Social rented residential flats	1,838,244	Private rented residential flats (excl. Other private rented/living rent free)	1,485,233
% of all households	5%	% of all households	8%	% of all households	6%
% of all residential flats	26%	% of all residential flats	39%	% of all residential flats	32%



Related to the difficulty in estimating incidence levels was the lack of sufficient profile information. The Census data does not identify leaseholders and while the English Housing Survey (a possible source of profile information) does ask if respondents are leaseholders, this is not the case for the Welsh equivalent (a number of other characteristics needed to profile the target population were also unavailable). Consequently, understanding what proportion of the target population each group of interest makes up (and by extension the setting of targets and achieving a representative sample without using a random sampling approach) is extremely difficult.

## 1.5 Chosen methodology

The survey methodology was selected in conjunction with CMA to maximise the chances of achieving 1,050 target interviews and to achieve a good mix of leaseholders by age and region within the available timescales and budget. A telephone methodology using a Computer Assisted Telephone Interviewing (CATI) approach was employed, with fieldwork conducted between 30 April and 1 June 2014. Interviewing was conducted by trained Ipsos MORI interviewers using a single script version and purchased sample.

In light of the lack of a viable comprehensive sample source covering all groups of interest, and the extremely high cost of a random sampling approach due to the estimated very low incidence level of the target population, it was decided that a purchased consumer sample would be used for the survey. Ipsos MORI purchased the sample from the UK Changes “Lifesketech” database, which is drawn from multiple data sources including lifestyle and product surveys, warranty and financial application forms, and other data feeds, and included contact details and some demographic information for circa 62,000 (self-identified) leaseholders.

Based on the ability to identify leaseholders specifically, and previous experience of using UK Changes sample<sup>13</sup>, Ipsos MORI estimated that the incidence level of the target population would be much higher than among the general population. While it was not possible to accurately estimate what the incidence level of the target population would be among the purchased sample, the main advantage of using UK Changes sample was the likely higher incidence level would be high enough for the fieldwork to be far more efficient and therefore completed at a much lower cost than possible via a Random Digit Dialling (RDD) approach.

The UK Changes sampling approach also had the advantage over free-find approaches such as RDD because the sample was flagged with age and region categories and therefore allowed targeting of groups to provide an adequate cross section of the sample (further details on the profile of participants by age and region are presented in Section 2).

While the UK Changes approach was a cost effective way of targeting leaseholders given the lack of a suitable sample frame providing universal coverage, it was subject to some limitations. Information received from UK Changes showed that leaseholder data is drawn from four main data sources, which cover over 120 feeds. UK Changes were unable to name the exact sources due to commercial confidentiality, but Ipsos MORI was informed that they were a broad mix including lifestyle surveys, insurance quotations, holiday questionnaires, warranty cards and similar data that is regularly refreshed. However, it is possible that the nature of these sample sources affects the profile of the achieved sample.

The extent of this effect – how much the achieved sample is skewed away from the target population – cannot be calculated due to the lack of adequate profile information. Using UK Changes sample also

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<sup>13</sup> Not specifically leaseholder sample

inevitably skews the achieved sample towards owner-occupier leaseholders given the circa 62,000 leaseholders are self-identified as leaseholders based on their personal tenure (so any buy-to-let leaseholders are picked up by chance rather than design). In addition, UK Changes could not ensure that each of the groups of interest was proportionally represented, or that specific targets for these groups could be reached.

Whereas a random sampling approach provides the highest probability that the achieved sample represents the population as a whole, using purchased consumer sample means results cannot be described as representative, or weighted to be such, as there is insufficient profile information to compare and weight the achieved sample profile to. This means that any inferences that are made have to be treated with caution as there is uncertainty over the extent to which the survey population reflects the target population.

A further limitation of the chosen methodology is that standard calculations of statistical significance cannot be applied. This means that caution should be taken when making comparisons between sub-groups (such as leaseholder type) and any differences observed are indicative only.

As the likely incidence level of the target population within the UK Changes sample was unknown, Ipsos MORI recommended a pilot phase (as well as a pilot of the questionnaire). However, following cognitive interviewing and discussion with CMA it was decided to move straight to fieldwork and test incidence levels as fieldwork was completed. This meant that careful monitoring and controlled targeting of sample was necessary during fieldwork to achieve the target interviews within the available budget and time.

Managing the sample during fieldwork was a challenging and evolving process. The approach adopted was to control the release and use of certain sections of the overall available sample to target either all sample, specific regions or specific age groups as necessary based on available proxy profile information from the Census and English Housing Survey. Targeting of sample during fieldwork was employed to ensure a good mix of respondents, boost certain sub-groups to more closely match the available proxy population figures, to boost the overall incidence rate, and ultimately to ensure the target 1,050 interviews were completed. For example, initial fieldwork results highlighted a significantly lower incidence rate among the sample in the North West than elsewhere<sup>14</sup>. Given the importance of carrying out the fieldwork efficiently to achieve the required sample size within the agreed timescale, after consultation it was decided to restrict the use of North West sample to improve the overall incidence rate and therefore the efficiency of the fieldwork.

To assist in the management of the available sample, on the basis that the UK Changes database would predominantly identify owner occupier leaseholders rather than buy-to-let (given the identification of a leaseholder for the database based on their own personal tenure), the following sources were used for proxy profile information:

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<sup>14</sup> One possible reason for this is the higher prevalence of non-flat, apartment or maisonette leaseholder properties in the North West compared to other regions.

- Census 2011 data for non-commercial owner occupied flats, apartments and maisonettes was used to provide a proxy for the regional distribution of owner occupier leaseholders
- English Housing Survey 2011/12 data for leaseholders was used as to provide a proxy for the age profile of owner occupier leaseholders

## 1.6 Questionnaire development

The survey questionnaire was developed in close conjunction with CMA and incorporated feedback from leaseholders via cognitive testing. A preliminary draft of the questionnaire was developed based on the initial drafting by CMA prior to Ipsos MORI being commissioned. This preliminary draft was taken forward into cognitive testing with leaseholders in early April 2014.

A total of eight leaseholders were recruited to each take part in one-to-one facilitated cognitive interviews lasting up to 60 minutes. Leaseholders were recruited on the basis of a recruitment screener agreed with CMA (see Appendix F). Table 1.6.1 presents the profile of the cognitive interviewees.

**Table 1.6.1 – Profile of cognitive testing interviewees**

	Interviews achieved	
QUOTA A. Owner occupiers in the private sector but not retirement developments	3	An analysis session was held by the research team at Ipsos MORI following each day of cognitive
QUOTA B. Buy-to-let leaseholders in the private sector but not retirement developments	2	
QUOTA C. Owner occupiers in LA or HA developments, but not retirement developments	3	
QUOTA D. Owner occupiers in retirement developments	0	

interviewing, to discuss the findings and any changes needed to the questionnaire. The questionnaire was updated in light of these, with the revised version taken forward into the next interviews. In total, three iterations of the questionnaire were used during the cognitive testing.

The final questionnaire agreed with CMA following the cognitive interviews was scripted and quality checked by Ipsos MORI. Interviewing commenced using this questionnaire version on the 30 April 2014, but a series of small amendments were made in light of initial feedback from interviewers and participants, and following review of interim data by Ipsos MORI and CMA. These changes are outlined in Appendix C.

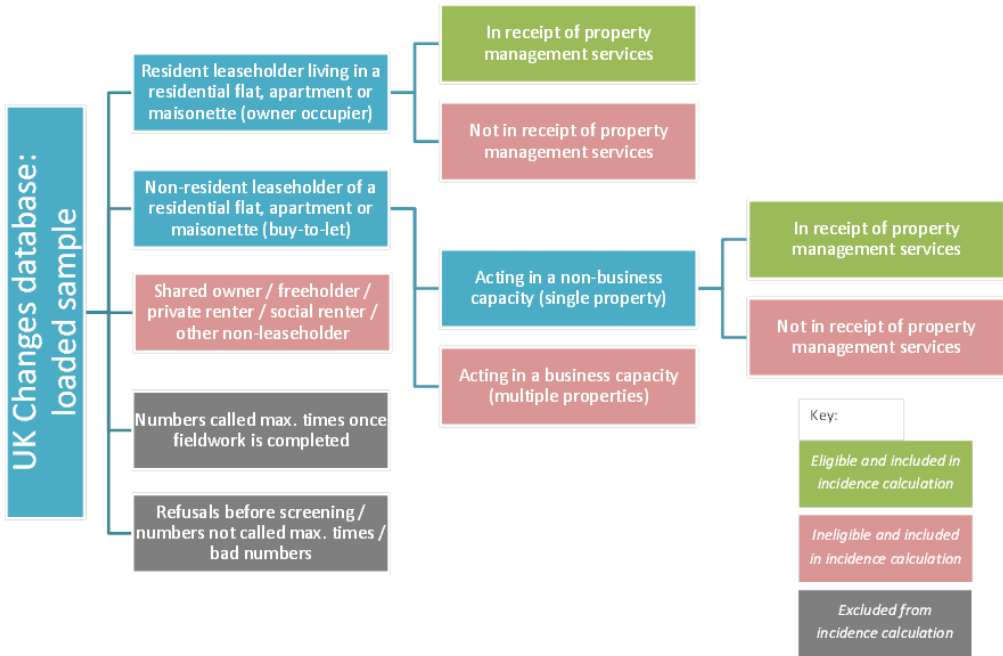
## 1.7 Sampling and fieldwork outcomes

A total of 1,050 interviews were completed, with interviews achieved in all Government Office Regions (GORs) in England and Wales and across the three broad target age bands<sup>15</sup> (section 2 of this report presents an overview of the profile of the achieved sample, including against available proxy profile information).

The incidence rate was calculated as the number of eligible respondents (those passing through the screener questionnaire, i.e. 1,215 respondents) divided by the total number of screened respondents (those screened in added to those screened out, i.e. 4,334 respondents) giving an overall incidence rate of 28% (see Figure 1.7.1). Aspects of non-response are not incorporated into the incidence calculation. Throughout the report, where percentages do not sum to 100, this is due to computer rounding, multiple responses or the exclusion of 'don't know' categories.

The survey questions were preceded by a detailed screener questionnaire, designed to screen out ineligible sample leads as quickly as possible. The screener questionnaire established if each sample lead was eligible as an owner occupier and/or buy-to-let leaseholder, in accordance with the eligibility criteria stipulated by CMA. Key sample and incidence figures are presented in Table 1.7.1.

Figure 1.7.1 – Calculating incidence



<sup>15</sup> 18-34, 35-54, 55+

Table 1.7.1 – Key sample and incidence figures

Region	Total sample available	Unusable sample	Refusals	Number reached max. tries	Cases through to screener	Cases not passing screener	Cases passing screener	Incidence (row %)	Interviews completed
East Midlands	1,314	236	475	49	176	130	46	26%	40
East of England	2,840	519	900	96	347	207	140	40%	119
London	5,923	1,207	1527	209	681	390	291	43%	255
North East	2,607	433	877	72	432	379	53	12%	47
North West <sup>16</sup>	5,310	594	645	0	460	439	21	5%	17
South East	5,127	897	1,729	197	716	395	321	45%	278
South West	2,695	485	954	98	374	232	142	38%	125
Wales	1,616	273	589	44	234	201	33	14%	28
West Midlands	3,325	568	1,148	108	424	337	87	21%	75
Yorkshire & The Humber	3,836	631	1,413	118	490	409	81	17%	66
<b>Overall</b>	<b>34,593</b>	<b>5,843</b>	<b>10,257</b>	<b>991</b>	<b>4,334</b>	<b>3,119</b>	<b>1,215</b>	<b>28%</b>	<b>1,050</b>

<sup>16</sup> \*Due to the very low incidence rate in the North West, the CMA and Ipsos MORI chose to suspend the available sample in this region halfway through fieldwork (a total of 2,419 leads were suspended)

## **2 Sample profile**



## 2 Sample profile

### 2.1 Overview

Details of the achieved sample by region, age and type as well as the relationships between age and regional data by type of development and leaseholder are shown in Appendix G. By way of summary, of the 1050 leaseholders interviewed half (51%) were resident in London/South East and three fifths (62%) were over 55 years of age.

We have focused on age and region in particular given that these were among the key variables considered when sampling and analysing the survey results (in line with the SoR). We have also considered leaseholder types and RTMC/RMC given the research objective to understand differences in perspectives on property management services among these groups.

Understanding the characteristics of the 1,050 leaseholders we interviewed is important context for the analysis but so too is understanding the relationships between such characteristics. We should avoid describing differences in the survey data by region, age etc. at face value, without understanding how, if at all, these overlap.

To illustrate further, the London sample of leaseholders is younger than those in other regions – among our sample 27% are aged 44 or under compared to just 9% in the West Midlands (joint lowest in terms of younger leaseholders with the South East) and 19% of our leaseholders overall. In addition, LA leaseholders make up a higher proportion of our London sample than is the case elsewhere – 30% compared to 12% in the West Midlands – and there is a higher incidence of RTMC/RMC leaseholders among older age groups. As we describe later in this report, older leaseholders, leaseholders in retirement properties and the RTMC/RMC group all have higher levels of satisfaction with property managers while the reverse is true among LA/HA leaseholders. This means that while at face value we may observe differences in results between regions, this may, at least in part, reflect the differences in the characteristics of leaseholders within those regions.

Such analysis is useful but what we cannot do is demonstrate the causal characteristics – e.g. whether lower satisfaction is a result of someone's age, which in turn affects regional results, or vice versa. That said, we have run cross-tabulations to investigate several factors, for example, whether levels of satisfaction are uniformly lower among younger age groups, or among types of leaseholders, regardless of which region they are in. Such analysis finds consistently lower levels of satisfaction, and higher dissatisfaction, among LA/HA leaseholders across regions, despite those regions having

different age profiles. This applies equally to perceptions of value for money and reported reasons to be dissatisfied with RTMC/RMC. In addition, we can see that among the RTMC/RMC group – as with leaseholders more generally – satisfaction increases with age but also that in each age category, the RTMC/RMC group are more positive than those who are not RTMC/RMC.

This analysis, described in more detail in the section which follows, is inevitably somewhat constrained by the sample sizes involved (for example the achieved sample includes 21 RTMC/RMC leaseholders who are aged under 45) though sample sizes are sufficient to draw out valid differences by different age groups, leaseholder types and those who are/are not RTMC/RMC.

Furthermore, it is important to remember that these findings are presented with the qualification that the survey results at aggregate and disaggregated level may not reflect the target population as a whole nor to sub-sets of it, especially given that we cannot describe the achieved sample as 'representative' in a statistical sense.

## 2.2 The sample profile in detail

Table 2.2.1 details the breakdown of achieved interviews by the final ten groups of interest identified by the CMA. The majority of interviews were achieved with owner occupiers, as would be anticipated due to the sample source (further information can be found in Section 1).

**Table 2.2.1 – Interviews achieved by groups of interest**

Groups of interest		Interviews
A	Private owner occupier - non RTMC/RMC	269
B	Private owner occupier - RTMC/RMC	142
C	Private buy-to-let - non RTMC/RMC	6
D	Private buy-to-let - RTMC/RMC	7
E1	Owner occupier LA - TMO and non-TMO	166
E2	Buy-to-let LA - TMO and non-TMO	5
F1	Owner occupier HA - RTMC/RMC and non-RTMC/RMC	97
F2	Buy-to-let HA - RTMC/RMC and non-RTMC/RMC	1
G1	Owner occupier – retirement development	131
G2	Buy to let – retirement development	0
<p><i>The figures above total 824 respondents. A further <b>226 interviews</b> (34 buy-to-let and 192 owner-occupier leaseholders) were conducted with respondents who, due to the responses given (for example saying don't know at key classification questions), cannot be assigned to the ten groups of interest, but can be classified by aggregated groups (such as owner occupier vs buy-to-let).</i></p>		

997  
Owner occupier

53  
Buy to let

171  
RTMC/RMC

456  
Non-RTMC/RMC

It is important to understand the sample profile when analysing by sub-groups or making comparisons, particularly given the non-representative sample frame employed for the survey. For example, it is not uncommon in survey research for age to correlate with satisfaction, with older respondents often more likely to be satisfied. The achieved sample contains a higher proportion of older leaseholders than younger leaseholders and they express greater levels of satisfaction. This means that satisfaction would possibly have been lower with a younger sample.

A breakdown of the 1,050 achieved telephone interviews is provided in Table 2.2.2 along with figures showing available sample. Additional data tables and figures for this section can be found in Appendix G.

Table 2.2.2 – Sample profile

Region	Sample available (column %)	Interviews achieved (column %)
East Midlands	4%	4%
East of England	8%	11%
London	17%	24%
North East	8%	4%
North West*	15%	2%
South East	15%	27%
South West	8%	12%
Wales	5%	3%
West Midlands	10%	7%
Yorkshire and The Humber	11%	6%
<b>Overall</b>	<b>100%</b>	<b>100%</b>
London & S.E.	32%	51%
Rest of England	69%	49%
Age band	Sample available	Interviews achieved
25 to 34	14%	5%
35 to 54	44%	32%
55+	42%	63%
<b>Overall</b>	<b>100%</b>	<b>100%</b>

When looking at differences in experiences or perceptions between regions, it is important to try to understand what effect other key characteristics may be having; there may be correlations between characteristics. In the example above it could be region that is the driving factor in the results or it could be age. For example the London sample profile was younger than the overall sample while the majority of leaseholders surveyed in the South West and West Midlands were aged 55+.

A quarter of leaseholders we spoke to said they have a long-term illness, health problems or a disability. Not surprisingly, this was more likely to be a characteristic of older respondents and, those living in retirement properties.

The majority of leaseholders who participated in the survey stated that their total gross household income per year, from all sources, was £29,999 or less. This again may reflect the age profile of the sample – with almost half of respondents at retirement age.

Reflecting the older age profile of the sample, two-thirds of respondents had been a leaseholder for their current property for 11 years or more. Only two per cent of the respondents interviewed had been a leaseholder for their current property for less than three years.

Most of the leaseholders interviewed, said that other residents in their development were a mixture of owner-occupiers, renting from a HA, a LA or from a private landlord. A further third said that other residents in their development are mainly owner-occupiers.

Fewer than one in five lived in a development where other residents are predominately renting from a private landlord, LA or HA.

Overall, three in ten leaseholders recalled having to pay extra one-off amounts for major works in the last three years. This was more common amongst leaseholders living in developments owned by LAs.

### **3 Property management services**

### 3 Property management services

The section presents a summary of the types of services property managers are responsible for, how leaseholders rate the value for money for the services they receive, and leaseholder satisfaction<sup>17</sup> with specific services and the overall service provided by property managers.<sup>18</sup> It should be noted that the results throughout reflect leaseholders' perceptions, and so results are influenced by both the actual situation and leaseholders' understanding of that situation.

#### Objectives and key findings

- This section covers the services leaseholders receive from property managers and leaseholders' judgements of them, consultation on major works and contractors as well as the ability of leaseholders to communicate effectively with the property manager.
- The comparative experiences and views of those leaseholders living in developments owned by LAs and HAs and those in the private sector (including retirement developments) are discussed throughout.
- Cleaning of internal common areas e.g. hall, stairs, lifts was the best rated service with more than three-quarters of respondents saying the service provided was very or fairly good (78%).
- The worst rated service was maintenance and repairs to external common areas with one-fifth of leaseholders (19%) rating this services as fairly or very poor.
- Almost one fifth of LA leaseholders (16%) rated maintenance & repairs to external common areas as very poor.
- When asked about repairs and maintenance specifically, the best rated aspect was providing information on what the service charge is spent on with just over seven in ten leaseholders (72%) saying this was very or fairly good.
- Two thirds of leaseholders (64%) rated the overall service they receive as good.
- Half of leaseholders (52%) agree that the property manager provides value for money compared with three in ten (28%) who disagree.
- Where contractors were used at a development, seven in ten leaseholders (69%) rated the quality of contractors as good with a quarter (27%) saying they were very good. Just over 1 in 10 (13%) said the quality of contractors was very/fairly poor in.
- Leaseholders with a RTMC/RMC at their property were more likely to rate services as good compared with non-RTMC/RMC developments.

<sup>17</sup> Satisfaction levels were measured in terms of very good, fairly good, neither good nor poor, fairly good, fairly poor, very poor or don't know. Leaseholders were also asked to indicate whether they agree/disagree with a statement and here satisfaction is measured in terms of whether they strongly agree, tend to agree, neither agree or disagree, tend to disagree or strongly disagree or don't know.

<sup>18</sup> This meets objectives in set 1 of the SoR- 'dealings with managing agents and landlords'.

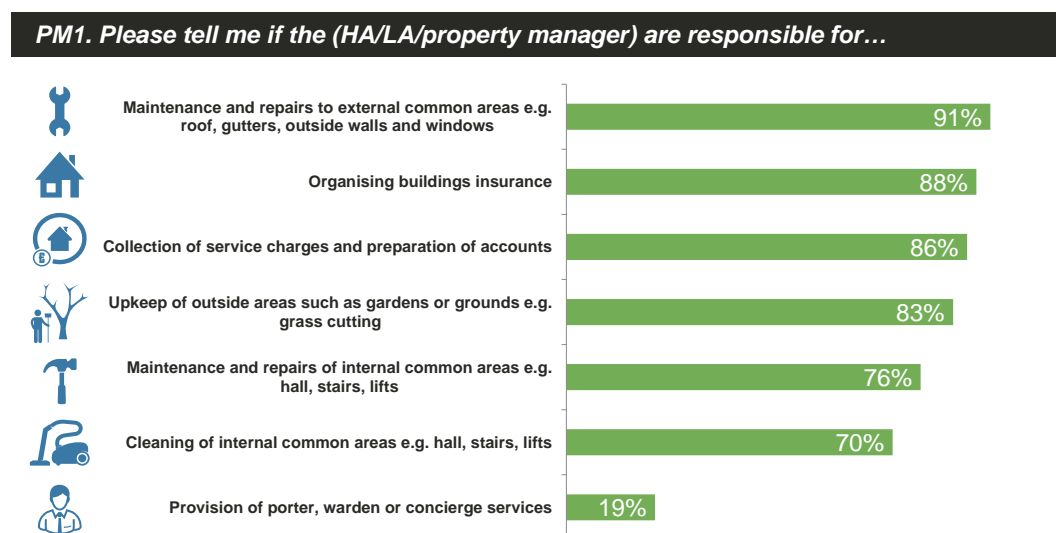
### 3.1 Service provision

Leaseholders were prompted about specific services their property manager is responsible for providing. The survey indicates that the majority of HAs, LAs and property managers<sup>19</sup> are responsible for the provision of most services, with the exception of porter, warden or concierge services, mentioned by only one fifth of respondents (19%). Nine in ten respondents (91%) said that *maintenance and repairs to external common areas e.g. roof, gutters, outside walls and windows* were provided. *Organising buildings insurance* (88%) and *collection of service charges and preparation of accounts* (86%) were similarly high in mentions.

Leaseholders with a RTMC or RMC were more likely to say that the property manager was responsible for all of the services compared with non-RTMC/RMC developments.

Respondents in LA properties were less likely to report services were provided, with the exception of *maintenance and repairs to external common areas e.g. roof, gutters, outside walls and windows*, compared with those in HA developments or those owned by a private individual or company.

Figure 3.1.1 – Service provision



Base: All leaseholders (1,050 ) 30 April – 1 June 2014

Source: Ipsos MORI

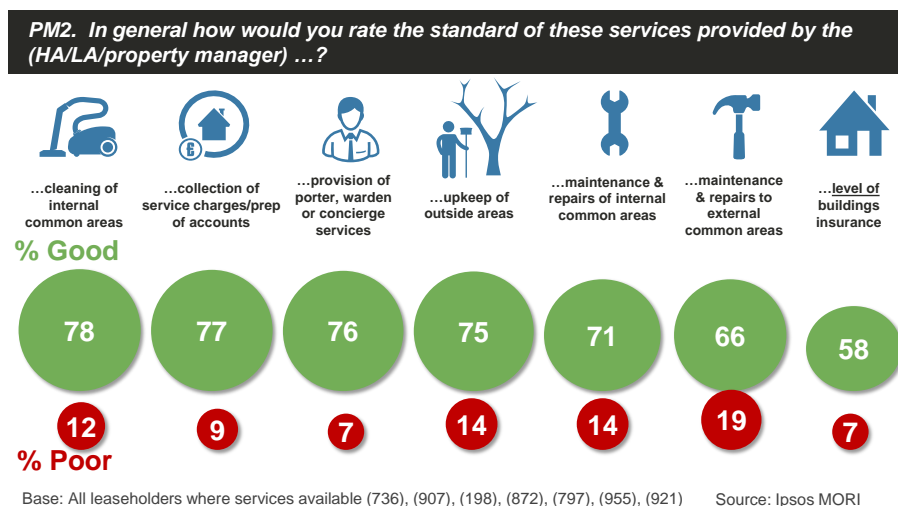
<sup>19</sup>LAs and HAs may provide property management services themselves, through a related organization (such as an Arms Length Management Organization) or might employ a private sector property manager. Where results refer to LA and HA, this refers to who owns the freehold whether or not they actually undertake the property management themselves. The term HA/LA/property manager is used to denote the provision of property management services by whichever entity is applicable for each respondent.



### 3.2 Service rating

The best rated service was *cleaning of internal common areas* with four-fifths of respondents (78%) rating this as fairly or very good. The worst rated service was *maintenance and repairs to external common areas* with one-fifth of leaseholders (19%) rating this services as fairly or very poor.

Figure 3.2.1 – Service rating



Half of the leaseholders interviewed (50%) rated *provision of porter, warden or concierge services* as very good, four in ten (44%) rated *cleaning of internal common areas* as very good, with a similar proportion (41%) rating *collection of service charges and preparation of accounts* as very good. Six percent of leaseholders rated *maintenance & repairs to internal common areas* as very poor.

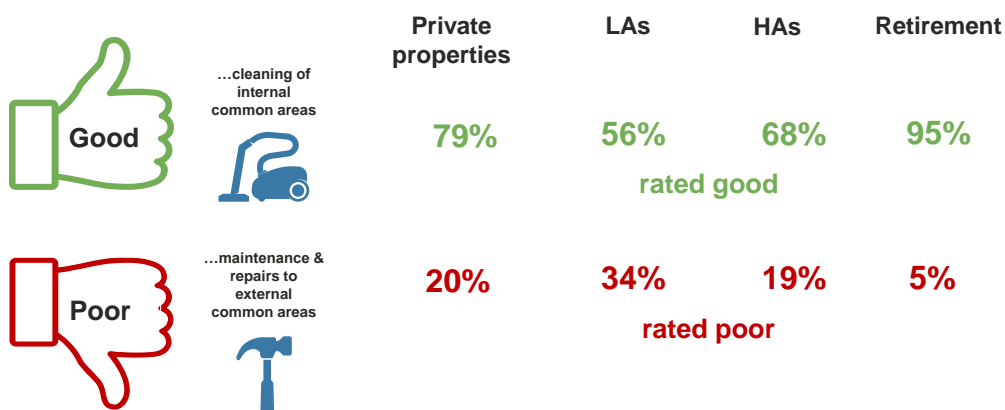
Table 3.2.1– Service rating

	Cleaning of internal common areas (736) (column %)	Collection of service charges and preparation of accounts (907) (column %)	Provision of porter, warden or concierge services (198) (column %)	Maintenance & repairs to internal common areas (797) (column %)
Very good	44%	41%	50%	36%
Fairly good	33%	36%	26%	36%
Neither good nor poor	7%	9%	7%	11%
Fairly poor	7%	5%	6%	8%
Very poor	5%	4%	2%	6%
Don't know/NA	3%	6%	3%	2%

Analysis by freehold ownership shows respondents in LA developments were more likely to give 'poor' ratings and less likely to give 'good' ratings than those in other development types. For example, when looking at service ratings for *cleaning of internal common areas*, leaseholders in retirement properties were very likely to rate the service as good (95%) while under six in ten (56%) of those in LA developments did so.

Figure 3.2.2 – Best and worst rated services by development type

**PM2. In general how would you rate the standard of these services provided by the (HA/LA/property manager) ...?**



Base: All leaseholders where services available, 30 April – 1 June 2014

Source: Ipsos MORI

Almost one fifth of LA leaseholders (16%) rated *maintenance & repairs to external common areas* as very poor compared with private property (7%) and HA leaseholders (7%).

Table 3.2.2 - Service rating of maintenance & repairs to external common areas by development type

	Private properties (523) (column %)	LAs (162) (column %)	HAs (117) (column %)	Retirement (126) (column %)
Very good	36%	14%	32%	48%
Fairly good	35%	33%	30%	40%
Neither good nor poor	8%	15%	17%	2%
Fairly poor	10%	18%	9%	2%
Very poor	7%	16%	7%	2%
Don't know/NA	4%	4%	6%	4%

Leaseholders in properties with a RTMC/RMC were more likely to rate services as good than those in non-RTMC/RMC developments. For example nine in ten leaseholders with

a RTMC/RMC at their development (89%) rated *collection of service charges and preparation of accounts* as good compared with seven in ten non-RTMC/RMC leaseholders (72%).

**Table 3.2.3 - Service rating of collection of service charges and preparation of accounts by RTMC/RMC vs non-RTMC/RMC**

	RTMC/ RMC (159) (column %)	Non-RTMC/RMC (391) (column %)
Very good	58%	38%
Fairly good	30%	34%
Neither good nor poor	4%	9%
Fairly poor	3%	9%
Very poor	2%	4%
Don't know/NA	4%	7%

However in terms of ratings of *the collection of service charges and preparation of accounts*, HA leaseholders judge this worst with 16% rating this as fairly or very poor, compared with private (9%) and LA leaseholders (10%).

**Table 3.2.4 - Service rating of collection of service charges and preparation of accounts by development type**

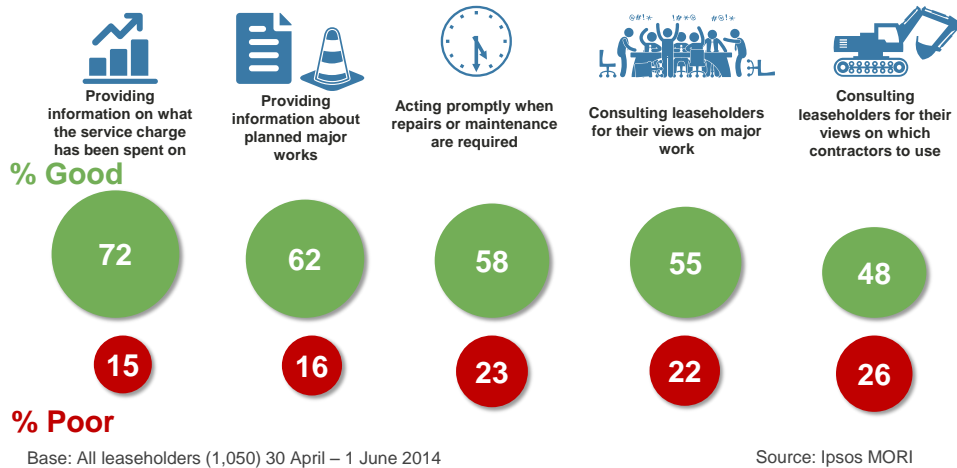
	Private properties (512) (column %)	LAs (147) (column %)	HAs (105) (column %)	Retirement (117) (column %)
Very good	44%	29%	38%	53%
Fairly good	35%	41%	30%	28%
Neither good nor poor	7%	15%	9%	3%
Fairly poor	6%	3%	11%	2%
Very poor	3%	6%	5%	3%
Don't know/NA	6%	5%	8%	12%

\*the combination of fairly poor and very poor for LA leaseholders is reported as 10% above which is correct, and a result of rounding.

When asked about repairs and maintenance specifically, the best rated aspect was *providing information on what the service charge is spent on* with just over seven in ten leaseholders (72%) saying this was very or fairly good. The aspect viewed least favourably was *consulting leaseholders for their views on which contractors to use* with a

quarter (26%) rating this very or fairly poor. One in seven (14%) of those asked rated this as very poor.

Figure 3.2.3 – Rating of different aspects of repairs and maintenance



Leaseholders with a RTMC/RMC at their property were more likely to rate services as good compared with non-RTMC/RMC developments. For example when asked about *consulting leaseholders for their views on which contractors to use*, seven in ten leaseholders with a RTMC/RMC at their property said this was good (69%) compared to just over four in ten without a RTMC/RMC (43%).

Table 3.2.5 - Service rating of consulting leaseholders for their views on which contractors to use by RTMC/RMC vs non-RTMC/RMC

	RTMC/ RMC (171) (column %)	Non-RTMC/RMC (456) (column %)
Very good	42%	22%
Fairly good	27%	21%
Neither good nor poor	7%	8%
Fairly poor	8%	12%
Very poor	3%	19%
Don't know/NA	14%	17%

Leaseholders who feel the property manager provides value for money were more likely to rate aspects of repairs and maintenance as good. For example, when asked about *acting promptly when repairs or maintenance are required*, eight out of ten leaseholders

who feel they get value for money (81%) rated this as good compared with a quarter who did not feel the property manager provides value for money (23%).

**Table 3.2.6 – Acting promptly when repairs or maintenance are required by PM5**

	Property manager provided value for money	
	Agree (549) (column %)	Disagree (290) (column %)
Very good	46%	4%
Fairly good	35%	19%
Neither good nor poor	6%	11%
Fairly poor	4%	21%
Very poor	1%	34%
Don't know/NA	8%	10%

Leaseholders in retirement developments expressed favourable views on services. For example, *providing information on what the service charge has been spent on* was rated as very good by six in ten (62%) leaseholders in retirement developments. Leaseholders in private, LA and HA properties rated this service lower with 40%, 26% and 37% respectively rating *very good*.

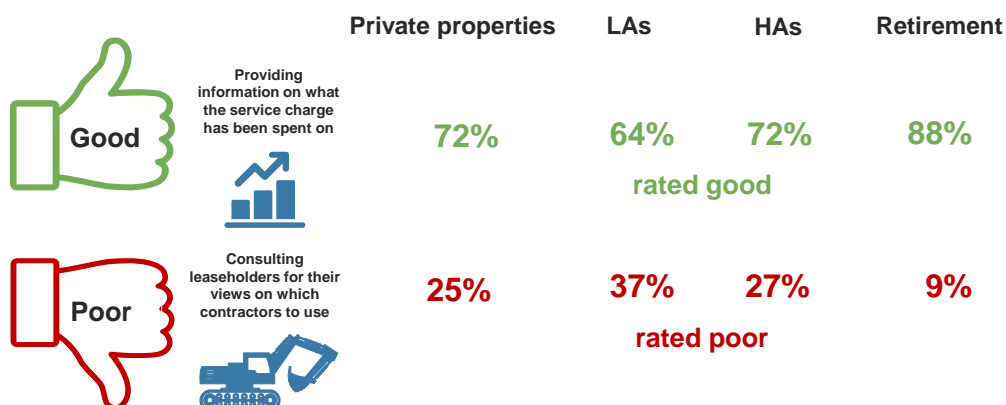
**Table 3.2.7 – providing information on what the service charge has been spent on by development type**

	Private properties (586) (column %)	LAs (178) (column %)	HAs (124) (column %)	Retirement (131) (column %)
Very good	40%	26%	37%	62%
Fairly good	33%	38%	35%	24%
Neither good nor poor	6%	8%	6%	2%
Fairly poor	6%	12%	8%	5%
Very poor	8%	13%	11%	3%
Don't know/NA	8%	3%	3%	5%

Leaseholders in LA properties were more likely to rate *consulting leaseholders for their views on which contractors to use* as poor; 37% compared with 27% of those in HAs and 25% in private properties.

Figure 3.2.4 – Best and worst rated aspects of repairs and maintenance

**PM3. Now thinking about repairs and maintenance, how would you rate (HA/LA/property manager) in terms of the following ...?**



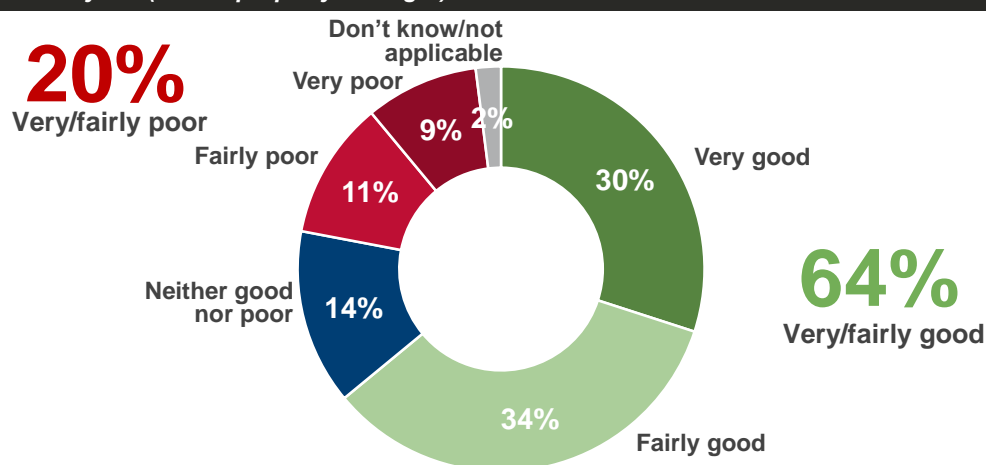
Base: All leaseholders (1,050) 30 April – 1 June 2014

Source: Ipsos MORI

Two thirds of leaseholders (64%) rated the overall service they receive as good. Three in ten (30%) said the service was very good. One in five leaseholders (20%) said they received a very or fairly poor service.

Figure 3.2.5 – Overall service provided by HA/LA/property manager

**PM4. Taking everything into account, would you say that the overall service provided by the (HA/LA/property manager) is....?**



Base: All leaseholders (1,050) 30 April – 1 June 2014

Source: Ipsos MORI

Leaseholders with a RTMC/RMC at the property were more likely to rate the overall service as good (83%) compared with those in non-RTMC/RMC properties (58%).

Table 3.2.8 - Service rating of overall service by RTMC/RMC vs non-RTMC/RMC

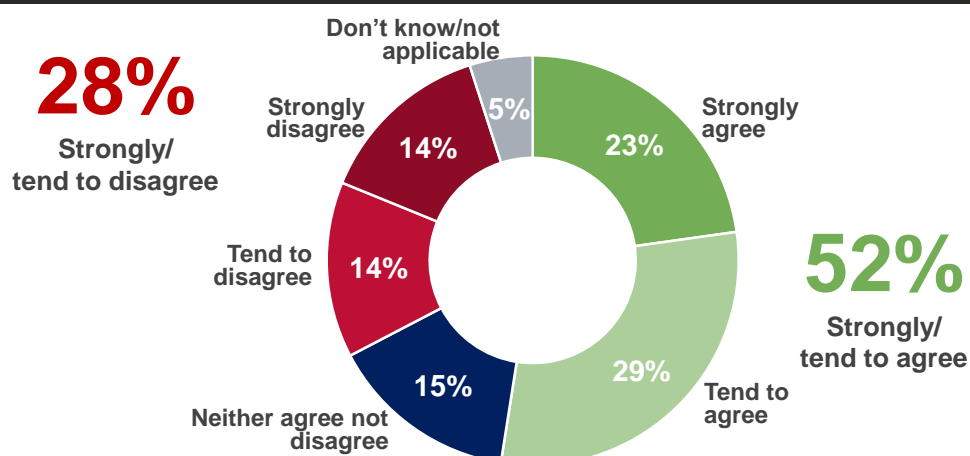
	RTMC/ RMC (171) (column %)	Non-RTMC/RMC (456) (column %)
Very good	46%	26%
Fairly good	37%	32%
Neither good nor poor	8%	16%
Fairly poor	4%	14%
Very poor	4%	11%
Don't know/NA	2%	1%

Half of leaseholders (52%) agree that the HA/LA/property manager provides value for money compared with three in ten (28%) who disagree. One quarter of respondents (26%) who had had reasons to be dissatisfied with the property manager still agreed that they receive value for money, but half of leaseholders (52%) who had reason to be dissatisfied with the property manager disagree that they receive value for money. Half of leaseholders (48%) who have seen a rise in service charge in the past 2 years agreed they receive value for money compared with a third (32%) who disagreed.

Younger leaseholders were the most likely to disagree they receive value for money. Half of 25-34 year olds (51%) disagreed that they receive value for money compared with four in ten 35-44 year olds (41%) and three in ten 45-64 year olds (30%). Leaseholders in low income households (up to £9,999) are the most likely to agree they receive value for money (58%) while those with a household income of £20,000-£39,999 are the least likely to agree (48%) Leaseholders in larger developments are the most likely to agree they receive value for money. Two-thirds of those in developments of 20+ units (63%) agree the HA/LA/property manager provides value for money compared with a third of those in developments which contain 1-5 units (32%).

Figure 3.2.5 – Value for money

**PM5. To what extent, if at all, do you agree or disagree that the (HA/LA/property manager) provides value for money?**



Base: All leaseholders (1,050 ) 30 April – 1 June 2014

Source: Ipsos MORI



### 3.3 Value for money

A quarter of respondents (26%) who had had reasons to be dissatisfied with their HALLA/property manager still agreed that they receive value for money but half of leaseholders (52%) who had reason to be dissatisfied disagreed that they receive value for money.

**Table 3.3.1 –Value for money by ever had reasons to be dissatisfied**

	Had reasons to be dissatisfied with the property manager	
	Yes (444) (column %)	No (590) (column %)
Strongly agree	5%	36%
Tend to agree	21%	37%
Neither agree nor disagree	20%	12%
Tend to disagree	23%	6%
Strongly disagree	29%	3%
Don't know	2%	6%

**Table 3.3.2 – Value for money by service charge levels in past 2 years**

	Change in service charge in past 2 years		
	Has gone up in past 2 years (445) (column %)	Stayed the same (178) (column %)	Has gone down in past 2 years (30) (column %)
Strongly agree	20%	32%	27%
Tend to agree	28%	34%	27%
Neither agree nor disagree	16%	14%	17%
Tend to disagree	16%	9%	13%
Strongly disagree	16%	11%	17%
Don't know	4%	-	-

Younger leaseholders are the most likely to disagree they receive value for money. Half of 25-34 year olds (51%) disagree that they receive value for money compared with four in ten 35-44 year olds (42%) and three in ten 45-64 year olds (31%).

Table 3.3.3 – Value for money by age

	Age group				
	25-34 (49) (column %)	35-44 (152) (column %)	45-64 (348) (column %)	65-74 (231) (column %)	75+ (248) (column %)
Strongly agree	16%	10%	18%	29%	32%
Tend to agree	14%	24%	33%	28%	33%
Neither agree nor disagree	16%	24%	18%	15%	9%
Tend to disagree	22%	20%	16%	10%	8%
Strongly disagree	29%	22%	15%	13%	6%
Don't know	2%	1%	1%	6%	11%

Leaseholders in low income households (up to £9,999) were most likely to agree they receive value for money (59%) while those with a household income of £20,000-£39,999 were the least likely to agree (48%)

Table 3.3.4 – Value for money by household income

	Household income			
	Up to £9,999 (101) (column %)	£10,000-£19,999 (168) (column %)	£20,000-£39,999 (203) (column %)	£40,000+ (177) (column %)
Strongly agree	25%	26%	19%	19%
Tend to agree	34%	25%	29%	31%
Neither agree nor disagree	13%	13%	19%	18%
Tend to disagree	12%	13%	15%	15%
Strongly disagree	14%	20%	16%	17%
Don't know	3%	4%	2%	1%

Leaseholders in larger developments were the most likely to agree they receive value for money. Just over six in ten of those in developments of 20+ units (62%) agreed the HALA/property manager provides value for money compared with one third of those in developments which contain 1-5 units (35%).

Table 3.3.5 –Value for money by development size

	Development size			
	1-5 (170) (column %)	6-10 (250) (column %)	11-20 (200) (column %)	20+ (406) (column %)
Strongly agree	17%	16%	29%	26%
Tend to agree	18%	29%	27%	36%
Neither agree nor disagree	26%	17%	15%	11%
Tend to disagree	14%	16%	15%	10%
Strongly disagree	18%	18%	13%	11%
Don't know	7%	4%	2%	5%

Leaseholders in private properties (54%) were the most likely to agree that their property manager provides value for money. Leaseholders with a RTMC/RMC at the property (78%) were more likely than those at non-RTMC/RMC properties (46%) to agree that the property manager provides value for money. A high proportion of leaseholders in retirement developments agreed they receive value for money with seven in ten (69%) agreeing.

Table 3.3.6 – Value for money

	Private properties (586) (column %)	LAs (178) (column %)	HAs (124) (column %)	Retirement (131) (column %)	RTMC/ RMC (171) (column %)	Non- RTMC/RMC (456) (column %)
Strongly agree	25%	11%	19%	35%	42%	19%
Tend to agree	29%	29%	30%	34%	36%	27%
Neither agree nor disagree	15%	21%	19%	7%	8%	17%
Tend to disagree	12%	19%	14%	6%	7%	15%
Strongly disagree	14%	19%	16%	6%	5%	18%
Don't know	5%	2%	3%	11%	2%	4%

There are a range of reasons given by leaseholders for disagreeing that their property manager provides value for money across *cost, services and communication*. The most commonly cited reasons were; four in ten (43%) said the *cost of management services is too high*, one third (32%) said *repairs and maintenance are not carried out when*

required with a similar proportion (30%) saying services (unspecified) are poor and residents are not kept informed about what is going on (28%).

Figure 3.3.1 - Reasons for disagreeing that they receive value for money from property manager

**PM6. Why do you say that? What else?**



Base: All leaseholders strongly/tend to disagree that property manager provides value for money (290)

Source: Ipsos MORI

Leaseholders in LA properties who disagreed that they receive value for money were the least likely to say *the cost of management services is too high* (41%) compared with other development types such as HA properties (49%) and private properties (44%).

Table 3.3.7 – Reasons for disagreeing that they receive value for money from property manager

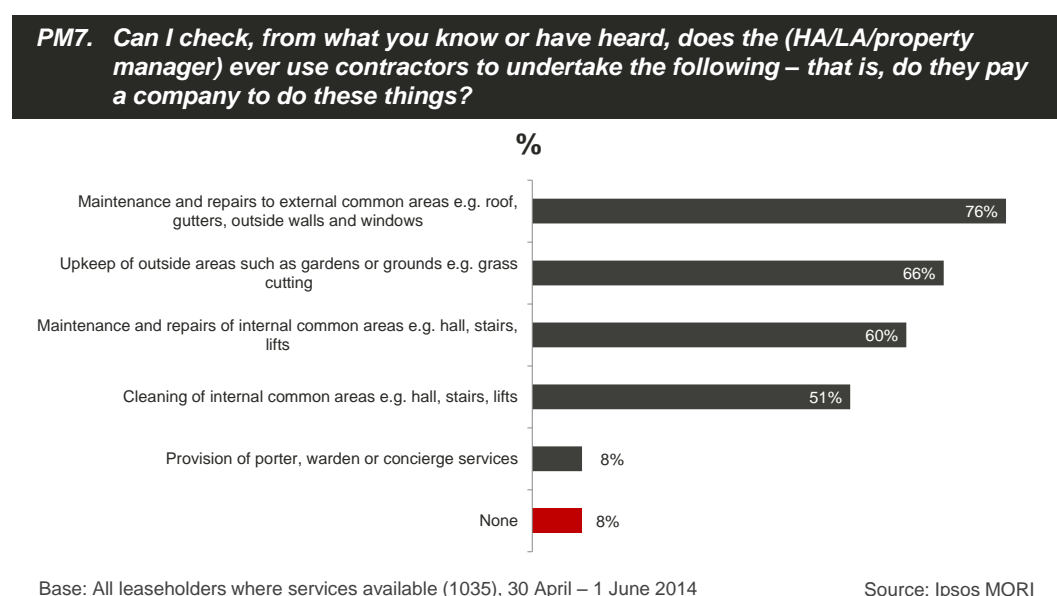
	Private properties (153) (column %)	LAs (66) (column %)	HAs (37) (column %)
Cost of management services is too high	44%	41%	49%
Services (unspecified) are poor	33%	33%	35%

Base: All leaseholders strongly/tend to disagree that property manager provides value for money

### 3.4 Use of contractors

Leaseholders were asked if the property manager used contractors for five different types of service. Three quarters (76%) of all leaseholders where services were available said contractors were used for *maintenance and repairs to external common areas e.g. roof, gutters, outside walls and windows*. Two-thirds of all leaseholders (66%) also said contractors were used for *upkeep of outside areas such as gardens or grounds e.g. grass cutting*. The service type least likely to be provided by a contractor was *provision of porter, warden or concierge services* with one in ten (8%) of leaseholders identifying this as a contracted service.

**Figure 3.4.1 – Use of contractors – where the property manager is responsible for providing the service**



Leaseholders in retirement properties were highly likely to say a contractor was used for *upkeep of outside areas such as gardens or grounds e.g. grass cutting* (79%), *maintenance and repairs of internal common areas e.g. hall, stairs, lifts* (70%) and *maintenance and repairs to external common areas e.g. roof, gutters, outside walls and windows* (81%).

Table 3.4.1 – Use of contractors

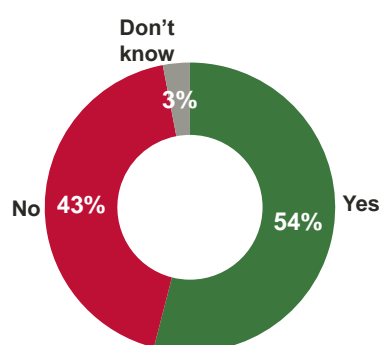
	Private properties (573) (column %)	LAs (178) (column %)	HAs (124) (column %)	Retirement (131) (column %)	RTMC/ RMC (169) (column %)	Non- RTMC/RMC (447) (column %)
Upkeep outside	70%	48%	69%	79%	79%	68%
Internal repair	64%	52%	56%	70%	78%	57%
Cleaning internal	57%	33%	49%	56%	67%	52%
External repair	77%	74%	76%	81%	89%	75%
Porter, warden	9%	5%	9%	28%	9%	8%
None/DK	13%	17%	12%	10%	4%	15%

Base: All leaseholders where services available (1035), 30 April – 1 June 2014

Seven in ten leaseholders (69%) rated the quality of contractors as good with a quarter (27%) saying they were very good. Just over one in ten said the quality of contractors used was very or fairly poor (13%).

Figure 3.4.2 – Quality of contractors used

**PM9. And can I just check, do leaseholders at (the property at.../the property we have been talking about) come together to discuss any issues and concerns about the management of their properties, perhaps at a regular meeting or through a residents committee?**



Base: All leaseholders (1,050 ) 30 April – 1 June 2014

Source: Ipsos MORI

One fifth of leaseholders in LA properties (22%) rated the quality of contractors used as poor, a higher proportion than any other development type (private/HA). Leaseholders in retirement properties viewed contractors favourably with eight in ten (81%) rating the quality of contractors used as very or fairly good.

**Table 3.4.2 – Quality of contractors used by development type and RTMC/RMC vs non-RTMC/RMC**

	Private properties (500) (column %)	LAs (147) (column %)	HAs (109) (column %)	Retirement (118) (column %)	RTMC/ RMC (163) (column %)	Non- RTMC/RMC (380) (column %)
Very/fairly good	73%	53%	61%	81%	87%	65%
Very/fairly poor	11%	22%	15%	6%	6%	14%
Neither/Don't know	15%	25%	25%	13%	8%	20%

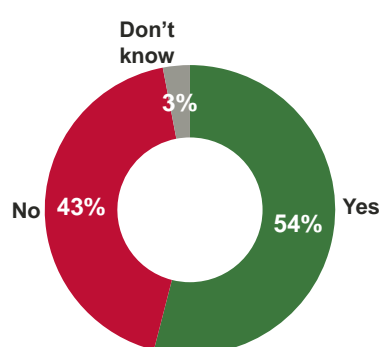
Base: All leaseholders whose property manager uses contractors (890)

### 3.5 Regular meetings and residents committees

More than half of leaseholders (54%) said their fellow leaseholders at the property came together to discuss management of their property.

Figure 3.5.1 – Regular meetings or residents committees

**PM9. And can I just check, do leaseholders at (the property at.../the property we have been talking about) come together to discuss any issues and concerns about the management of their properties, perhaps at a regular meeting or through a residents committee?**



Base: All leaseholders (1,050) 30 April – 1 June 2014

Source: Ipsos MORI

Leaseholders with a RTMC/RMC at their property (87%) were twice as likely to say they regularly come together to discuss management of their properties compared with those in non-RTMC/RMC properties (43%).

Table 3.5.1 – Regular meetings or residents committees

	Private properties (586) (column %)	LAs (178) (column %)	HAs (124) (column %)	Retirement (131) (column %)	RTMC/RMC (171) (column %)	Non- RTMC/RMC (456) (column %)
Yes	59%	42%	44%	75%	87%	43%
No	39%	53%	54%	21%	10%	55%
Don't know	2%	6%	2%	5%	3%	1%

Two-thirds of respondents (67%) who live in developments of 20+ units said they regularly come together to discuss management of their properties compared with four in ten leaseholders (41%) in developments containing 1-5 units.



Table 3.5.2 – Coming together to discuss issues by development size

		Development size			
		1-5 (170) (column %)	6-10 (250) (column %)	11-20 (200) (column %)	20+ (406) (column %)
	Yes	41%	42%	58%	67%
	Know	56%	52%	42%	31%
	Don't know	3%	5%	1%	2%

Leaseholders in developments consisting of mainly owner-occupiers were most likely to say they come together to discuss issues, with two-thirds of leaseholders saying yes (67%). This compares with four in ten leaseholders in developments in mainly renting (42%) or just over five in ten where there is a mixture of different groups (53%).

Table 3.5.3 – Coming together to discuss issues by occupant type

		Come together to discuss issues		
		Mainly owner occupiers (349) (column %)	Mainly renting (195) (column %)	A mixture of different groups (440) (column %)
	Yes	67%	42%	53%
	No	31%	56%	45%
	Don't know	2%	2%	2%

## **4 Right to Manage**

## 4 Right to Manage

This chapter presents findings on awareness and prevalence of RTM among leaseholders and experiences in setting such companies up.<sup>20</sup>

### Objectives and key findings

- This section addresses awareness and prevalence of RTM, the process and experience of setting up a RTMC as well as the reasons for attempting to (or not) setup an RTMC.
- Just over half of the leaseholders with private freehold are aware of RTM (54%).
- A quarter (25%) have exercised, or tried to exercise, their RTM.
- Of those who have exercised their RTM, most (71%) have been successful; only one in five leaseholders recall the attempt to introduce RTM as unsuccessful (20%).
- The reasons why leaseholders tried to take control of the management of the buildings where they live relate to poor service maintenance (18%) and dissatisfaction with the contractors in place at the time (17%), alongside poor value for money (12%). However, with the small base sizes (112), caution should be applied to interpretation of these findings.
- Overall, the view is that the management of the properties and the communal areas has got better since leaseholders have taken control (21 respondents), rather than worse (one leaseholder). That said, in most cases the perception is that things have stayed the same (26 respondents).

### 4.1 RTM

RTM allows leaseholders with communal facilities to take control of the management of the buildings where they live and gives them the right to appoint their own property manager. Just over half of the leaseholders with private freeholds are aware of RTM (54%). As would be expected, awareness of RTM is higher among those who have exercised their RTM or live in developments managed by a RMC (82%, compared with 45% living in non-RTMC/RMC developments).

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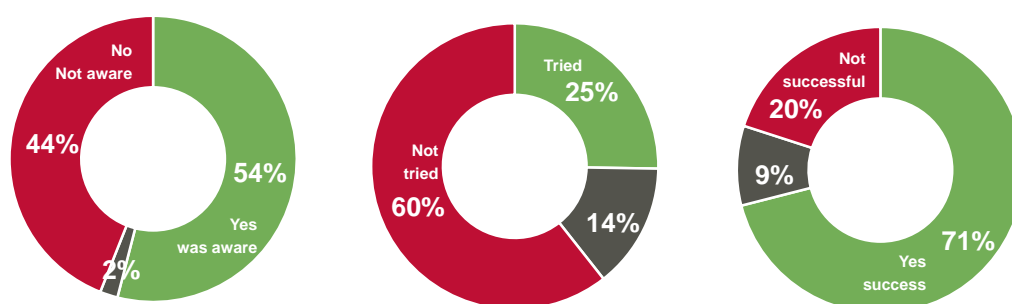
<sup>20</sup> This addresses objectives in set 3 of the Statement of Requirements – ‘Switching to another managing agent/contractors’.

Whilst over half of all leaseholders are aware of the entitlement, only a quarter (25%) have exercised - or tried to exercise – their RTM. Of these, most (71%) have been successful; only one in five recalls the attempt to introduce RTM as unsuccessful (20%).

It is interesting to note that seven per cent of respondents living in non-RTMC/RMC developments say that leaseholders in their development have tried – unsuccessfully - to implement their RTM.

Figure 4.1.1 – Awareness and take-up of RTM

**SW1. Right to Manage....Before this interview were you aware of this or not?**  
**SW2. ...have leaseholders...done or tried to do this...?**  
**SW3. And were they successful or not?**



Base: All leaseholders with private freeholder (SW1/SW2) (577), all who tried to introduce RTM (SW3) (147)

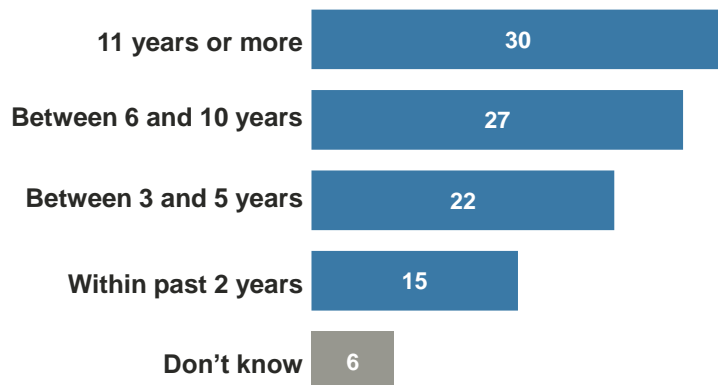
Source: Ipsos MORI

Table 4.1.1 – Awareness of RTM by RTMC/non-RTMC

	RTMC/ RMC (163) (column %)	Non-RTMC/RMC (348) (column %)
Yes, was aware	82%	45%
No, was not aware	17%	53%
Don't know	1%	2%

In most cases RTM was exercised over five years ago (57%). Very few leaseholders say that the RTM has been introduced in their current development within the past two years (15%).

Figure 4.1.2 – The introduction of RTM

**SW4. As far as you know, when did this happen?**

Base: All leaseholders successful i.e. RTMC (105)

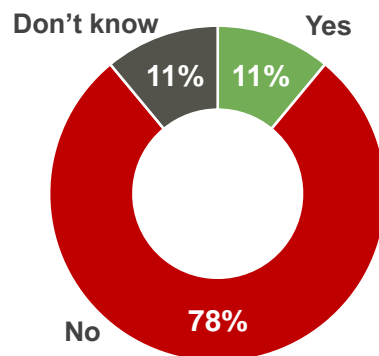
Source: Ipsos MORI

## 4.2 RMC

Only 11% of leaseholders with a private freehold say that their current property is managed through a RMC.

Figure 4.2.1 – RMC

**SW5. Sometimes leaseholders manage the property through a Residents Management Company RMC. From what you know is there a Residents Management Company at (the property at.../the property we have been talking about), or not?**



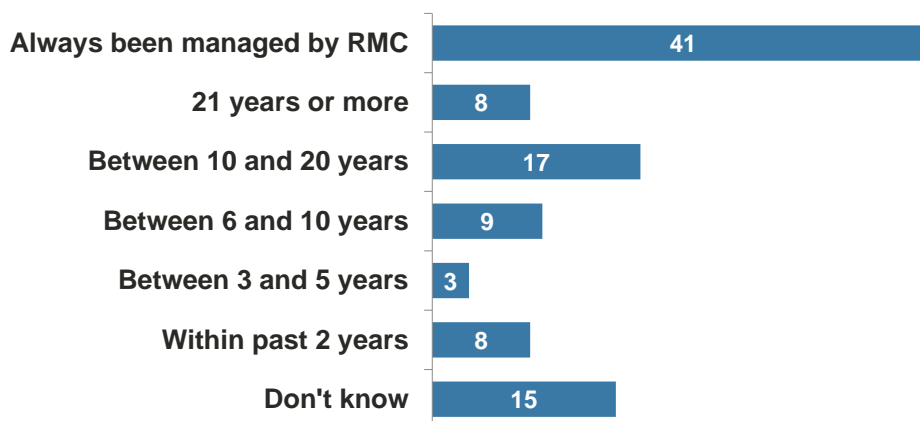
Base: All leaseholders with private freeholder or HA (& not RTMC) (596) 30 April – 1 June 2014

Source: Ipsos MORI

Four in ten leaseholders (41%), living in a property managed through a RMC, believe that this arrangement has *always* been in place, while a further 25% say the RMC was established over ten years ago. Only 11% say that the RMC was set-up within the last five years.

Figure 4.2.2 – The introduction of a RMC

**SW6. As far as you know, when was this set-up or has the property always been managed by a 'Residents Management Company (RMC)'?**



Base: All leaseholders with RMC (66)

Source: Ipsos MORI

The reasons why leaseholders tried to take control of the management of the buildings where they live were cited as poor service maintenance (18%) and dissatisfaction with the property managers in place at the time (17%); alongside poor value for money (12%). However, with the small base sizes (112), caution should be applied to interpretation of these findings.

A quarter of respondents (25%) were unsure as to why leaseholders had taken control of the management of the buildings. This is a legacy of most properties with a RMC having been managed this way for some time – possibly prior to the leaseholder taking on the property, or in the case of new developments RMCs are often established when the properties are initially sold.

Figure 4.2.3 – Reasons for a RTMC/RMC



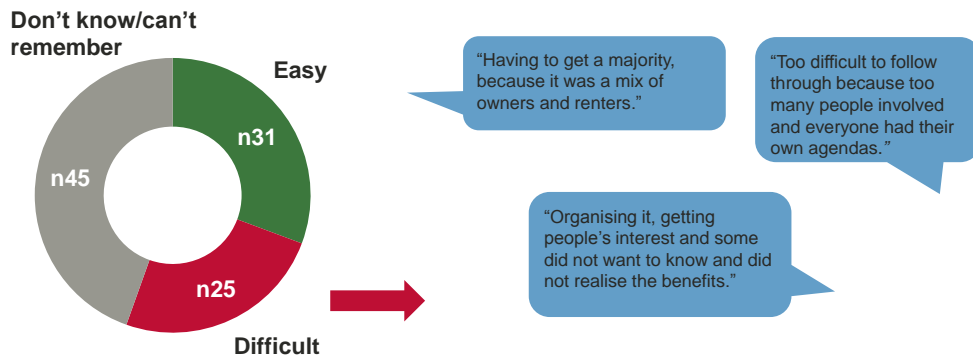
Base: All leaseholders successful i.e. RTMC/RMC (112)

Source: Ipsos MORI

Leaseholders are more likely to say that the process of taking control of the management of the buildings where they live was *easy* rather than *difficult* (31 respondents, compared with 25). Of those who said the process was difficult the main issues relate to difficulties in engaging people; alongside the conflicting agendas and priorities which different groups (e.g. owners and renters) bring with them. However, with the small base size, caution should be applied to interpretation of these findings.

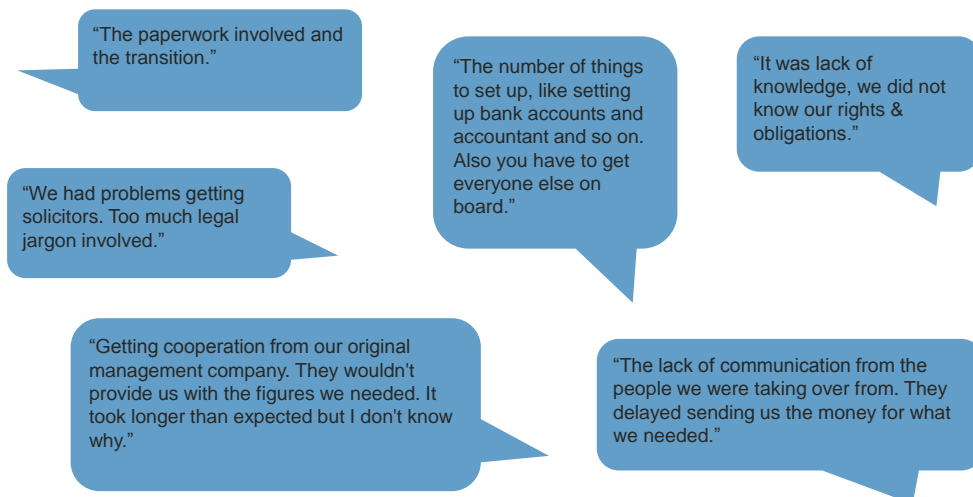
Figure 4.2.4 – Leaseholders experience of taking control

**SW8. And from what you know or have heard, was the process of leaseholders taking control or trying to take control...easy or difficult?**  
**SW9. And what specifically would you say was difficult about it...?**



Base: All leaseholders RTMC/RMC (101) / all finding difficulty (25)

Source: Ipsos MORI



Base: All leaseholders RTMC/RMC (101) / all finding difficulty (25)

Source: Ipsos MORI

Overall, the view is that the management of the properties and the communal areas has got *better* since leaseholders have taken control (21 respondents), rather than *worse* (one leaseholder). That said, in most cases the perception is that things have stayed the same (26 respondents).



Table 4.2.1 Leaseholders experience after taking control

	Would you say that since this happened, management of the properties and the communal areas has got better, got worse or has it stayed the same? (66) (column n)
Got better	21
Stayed the same	26
Got worse	1
Don't know/not sure	18

Given that in certain cases respondents said that the RMC had been in place for some years an increase in prices would be expected even if there was no decision to increase the level or quality of property management services.

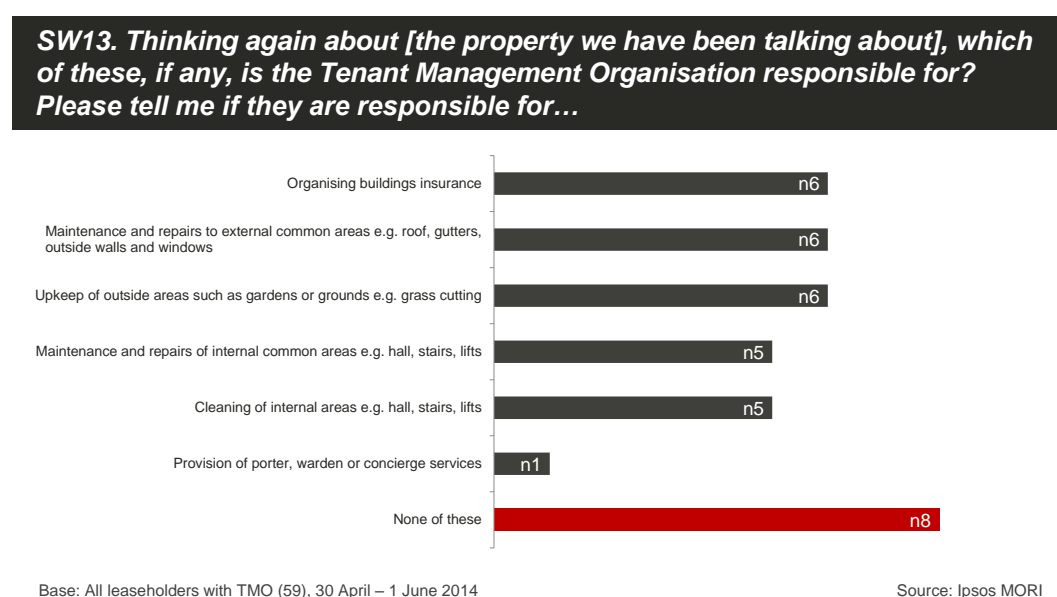
Table 4.2.2 Level of service charge since leaseholders took control

	And since this happened, has the level of service charges for the properties and the communal areas increased, decreased or stayed the same? (66) (column n)
Increased	31
Stayed the same	18
Decreased	5
Don't know/not sure	12

### 4.3 Tenant Management Organisations

Tenant Management Organisations (TMOs) are independent organisations that are set up to manage properties on behalf of the LA. Of the 17 leaseholders with a LA freeholder, 17 reported a TMO being in place at their property. Given the low base sizes here findings are reported in using actual figures rather than percentages. When asked what services were provided by the TMO, eight of the 17 leaseholders said *none of these*.

Figure 4.3.1 – TMO service provision



Six of the 17 leaseholders said the property had always been managed by a TMO while seven said they didn't know. Indeed, there was also low recall among leaseholders with regard to the ease of the process setting up the TMO (4 respondents).

## **5 Dissatisfaction with property managers**

## 5 Dissatisfaction with property managers

This section presents findings on the likelihood of leaseholders ever complaining to their property manager and if so, the main reasons for dissatisfaction.<sup>21</sup> Findings from questions about the procedure for making complaints and the overall satisfaction with outcomes are also included.

### Objectives and key findings

- This section discusses the prevalence and reasons for dissatisfaction with property managers, procedures for making complaints and overall level of satisfaction with outcomes.
- Overall, four in ten (42%) leaseholders said they had ever had a reason to be dissatisfied with their property manager.
- Leaseholders living in LA and HA properties were most likely to have said they had ever had a reason to be dissatisfied with their property manager (57% and 54% respectively)
- Among leaseholders who said they had a reason to be dissatisfied with their property manager, a third (37%) cited maintenance and repairs of external common areas as the main reason for their dissatisfaction.
- Among those who reported having been dissatisfied with their property manager, repairs and maintenance not being carried out when required (32%) and repairs and maintenance being performed to a low standard (25%) were the two most common reasons for dissatisfaction.
- Over half of leaseholders (56%) who contacted the HA/LA/property manager themselves were dissatisfied with the clarity given around how their query would be dealt with, with 55% dissatisfied with the time it took the property manager to deal with their query. Four in ten leaseholders (40%) who made contact with their property manager were dissatisfied with the ease of getting through to the right person.

Overall, four in ten (42%) leaseholders said they had ever had a reason to be dissatisfied with a property manager. Younger age groups were relatively more likely to

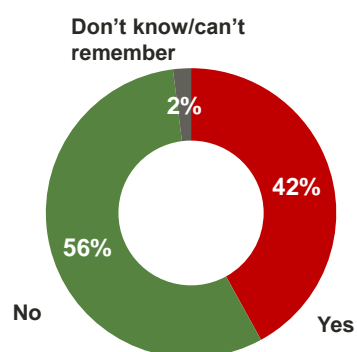
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<sup>21</sup> This addresses the objectives outlined in set 2 the SoR surrounding 'Making Complaints to managing agents/landlords and use of Independent Bodies that seek to resolve grievances'.

answer 'yes' to this, as were leaseholders in London. A fifth (22%) of those who rated their property manager as good overall answered 'yes'.

**Figure 5.0.1 – Leaseholders who have reasons for dissatisfaction with property manager**

**COM1. Still thinking about....have you ever had any reasons to be dissatisfied with...?**



Base: All leaseholders (1,050) 30 April – 1 June 2014

Source: Ipsos MORI

**Table 5.0.1 – Reason to be dissatisfied by overall service rating**

		Overall service provided by property manager?	
		Good (672) (column %)	Poor (213) (column %)
	Yes	22%	87%
	No	77%	11%
	Don't know/can't remember	1%	2%

**Table 5.0.2 – Leaseholders who have reasons for dissatisfaction with property manager by leaseholder type**

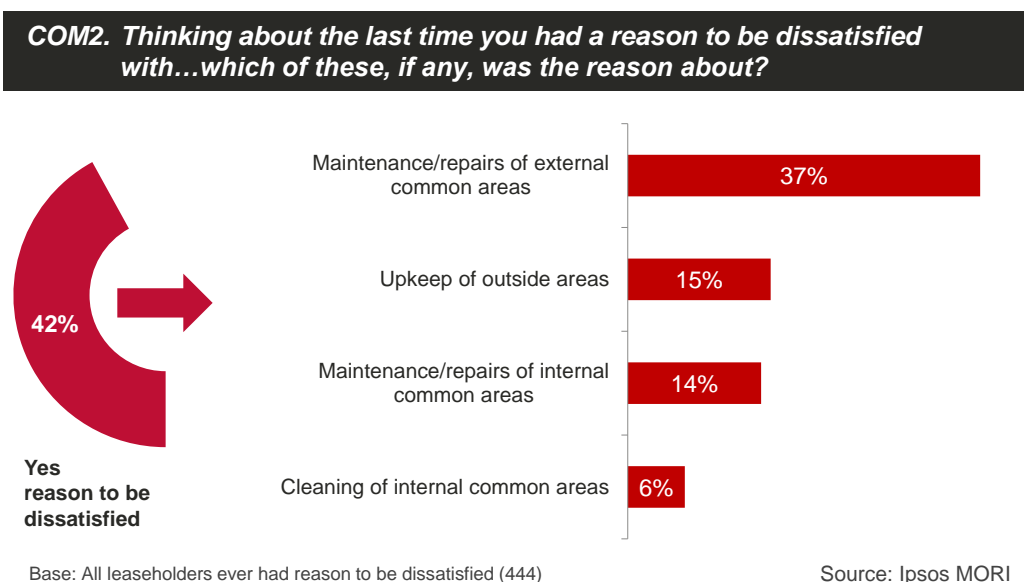
	Private properties (586) (column %)	LAs (178) (column %)	HAs (124) (column %)	Retirement (131) (column %)	RTMC/ RMC (171) (column %)	Non- RTMC/RMC (456) (column %)
Yes	39%	57%	54%	28%	26%	49%
No	59%	41%	45%	72%	72%	50%

Base: All leaseholders (1,050) 30 April – 1 June 2014

Among leaseholders who said they had a reason to be dissatisfied with their property manager, over a third (37%) cited maintenance and repairs of external common areas as the main reason for their dissatisfaction. Other reasons for dissatisfaction included

upkeep of outside areas (15%), maintenance/repairs of internal common areas (14%), cleaning of internal common areas (6%), lack of/poor communication (4%) and accounting and billing issues (3%).

Figure 5.0.2 – Reasons for dissatisfaction with property manager



The table below shows the different reasons for being dissatisfied with property managers by type of property. As can be seen, the reasons to be dissatisfied were the same for all groups.

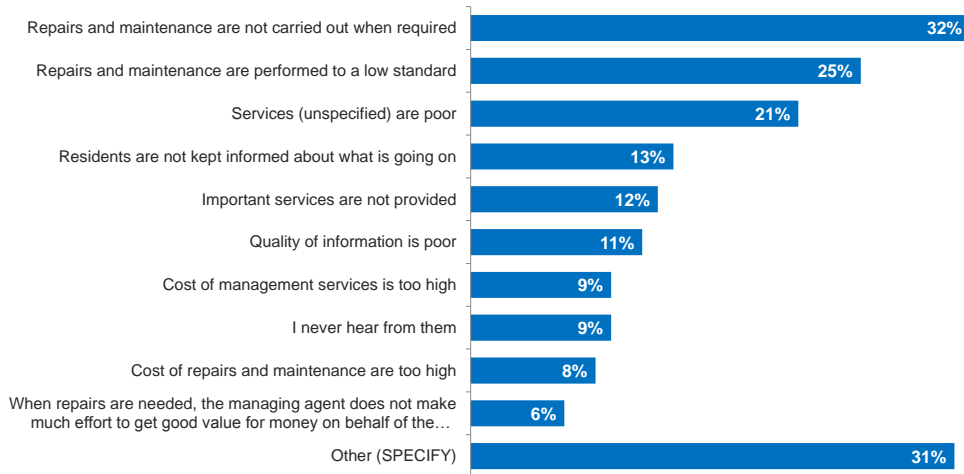
Table 5.0.3 – Reasons for dissatisfaction with property manager by leaseholder type

	Private properties (229) (column %)	LAs (101) (column %)	HAs (67) (column %)	Retirement (37) (column %)	RTMC/ RMC (44) (column %)	Non- RTMC/RMC (222) (column %)
External repair	36%	42%	33%	32%	25%	37%
Upkeep outside	16%	15%	13%	8%	18%	16%
Internal repair	14%	12%	19%	11%	16%	15%
Cleaning internal	6%	9%	3%	-	9%	4%

Base: All leaseholders ever had reason to be dissatisfied (444)

Among the 444 leaseholders who reported having been dissatisfied with their property manager, repairs and maintenance not being carried out when required (32%), and repairs and maintenance being performed to a low standard (25%) were the two most common reasons for dissatisfaction.

Figure 5.0.3 – Specific reason for dissatisfaction

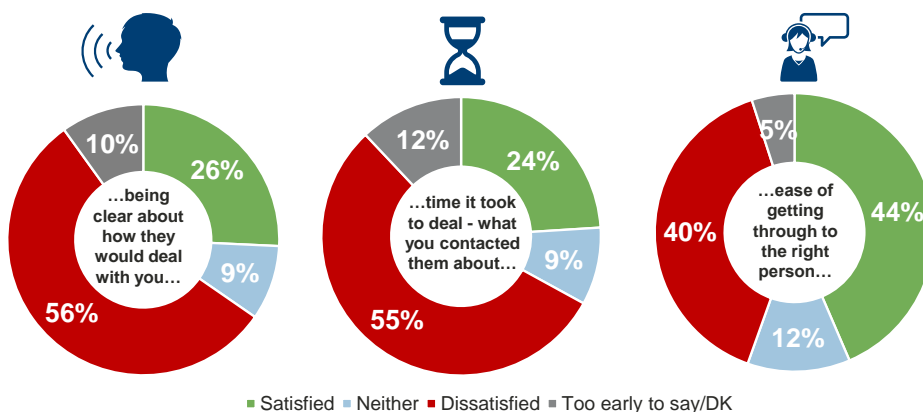
**COM3. And what specifically was the issue about?**

Base: All leaseholders ever had reason to be dissatisfied (444)

Source: Ipsos MORI

For leaseholders who contacted the HA/LA/property manager themselves, over half (56%) were dissatisfied with the clarity given around how their query would be dealt with, with 55% dissatisfied with the time it took the property manager to deal with their query. Four in ten leaseholders (40%) who made contact with their property manager were dissatisfied with the ease of getting through to the right person.

Figure 5.0.4 – Satisfaction with how the issue was handled

**COM7. Still thinking about the last time you contacted...how satisfied or dissatisfied were you with the following...?**

■ Satisfied ■ Neither ■ Dissatisfied ■ Too early to say/DK

Base: All leaseholders who made contact themselves (344)

Source: Ipsos MORI

## 6 Redress



## 6 Redress

This section addresses leaseholders' awareness of the First-tier Tribunal (FTT, formerly the Leaseholder Valuation Tribunal) or Ombudsman schemes and subsequently the awareness of their legal position and rights to take grievances to these bodies.<sup>22</sup>

### Objectives and key findings

- This section addresses awareness of FTT and Ombudsmen schemes and their use to resolve issues where leaseholders are dissatisfied with performance of property manager.
- A small minority of leaseholders interviewed said they have ever contacted either an Ombudsman (22 have), a First Tier Tribunal (33) or a local councillor/MP (78).
- Slightly more than two in five (44%) who had not contacted an Ombudsman were aware of the Ombudsman system.
- One in five (21%) leaseholders who had *not* contacted an LVT (also known as a First Tier Tribunal) were aware of the tribunal system.

Few of the leaseholders interviewed said they have ever contacted either an Ombudsman (22), a First Tier Tribunal (33) or a local councillor/MP (78). Among the 78 leaseholders who had contacted a local councillor/MP opinion is split as to whether the issue was resolved (33 say yes the issue was resolved, 31 say no it was not while 14 say they don't know/the issue is ongoing).

**Table 6.0.1 – Now thinking more generally. Have you ever contacted any of the following about any issues you have had with property management services you received as a leaseholder?**

	...an Ombudsman (column %) (1050)	...a First Tier Tribunal, sometimes known as a Leasehold Valuation Tribunal (LVT) (1050) (column %)	...a local councillor/MP (column %) (1050)
Yes	2%	3%	7%
No	97%	96%	92%
Don't know	1%	1%	*

<sup>22</sup> This addresses the objectives outlined in set 2 the SoR surrounding 'Making Complaints to managing agents/landlords and use of Independent Bodies that seek to resolve grievances'

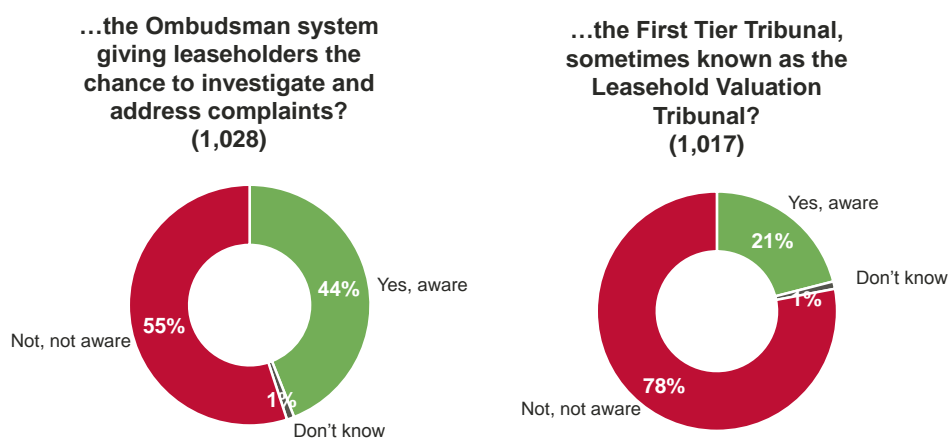
Among the leaseholders who had reason to be dissatisfied with the property manager and who had contacted an Ombudsman, FTT or local councillor/MP about an issue with property management services (468 participants), around one in ten sought advice or support about what to do about the issue from the HA/LA/property manager (12%), other leaseholders (11%), or a solicitor (9%). Just greater than half (54%) said they used 'any source'.

Slightly more than two in five (44%) participants who had not contacted an Ombudsman were aware of the Ombudsman system which gives leaseholders the chance to investigate and address complaints while 55% were not aware.

Awareness of the FTT was lower than for the Ombudsman system among leaseholders taking part in the survey. One in five (21%) leaseholders who had not contacted the FTT said they were aware of the tribunal. Slightly fewer than four in five (78%) were not aware of the tribunal before the interview.

**Figure 6.0.1 – Awareness of the Ombudsman and LVT systems**

**COM17out/COM27. Before this interview, were you aware, or not, of...**



Base: All leaseholders who had not contacted Ombudsman or LVT (1028) (1017)

Source: Ipsos MORI

## **7 Resilience**

## 7 Resilience

The Resilience section presents findings on whether leaseholders have seen any change in service charge in the past 2 years and whether any changes or one off fees have caused them financial difficulty, and if so, how it was dealt with.<sup>23</sup>

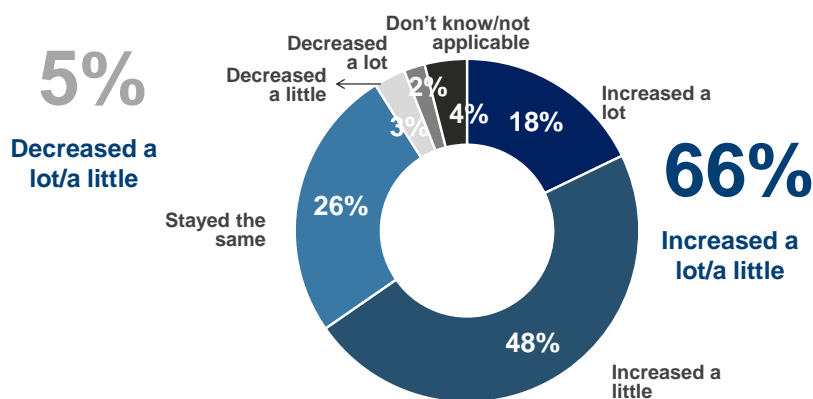
### Objectives and key findings

- This section addresses whether certain groups are more vulnerable, in the sense that they will be more likely to be impacted if service charges rise suddenly or are less likely to be able to challenge poor service.
- Two-thirds of leaseholders interviewed said their service charge increased a little (48%) or a lot (18%) in the last two years compared to 3% and 2% who said service charges decreased a little and a lot respectively.
- On the whole, they had not faced difficulty in meeting payments to the property manager in the last two years – 94% said they had not; 6% said they had.

Two thirds (66%) of participants said their service charge increased a little (48%) or a lot (18%) in the last two years. A relatively small proportion (5%) of leaseholders interviewed said their service charge had decreased in the last two years.

Figure 7.0.1 – Increase in service charge over the last two years

**RES1. You mentioned earlier that you pay...in service charge...  
Compared to 2 years ago would you say it has...**



Base: All leaseholders paying service charge (674)

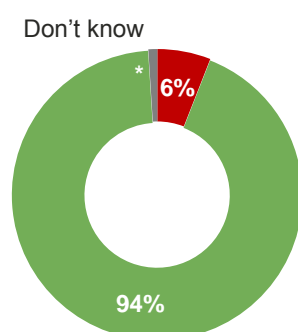
Source: Ipsos MORI

<sup>23</sup> This addresses the objectives outlined in the SoR surrounding whether certain groups are more vulnerable.

Very few leaseholders (6%) said they had had difficulty meeting payments to the property manager. The proportion who had faced difficulties is highest among those leaseholders participating who live in LA properties (11%).

**Figure 7.0.2 – Difficulties making payments to the property manager.**

**RES2. And thinking about the past 2 years have you ever been unable to pay any money that you have owed... or not?**



Base: All leaseholders (1,050) 30 April – 1 June 2014

Source: Ipsos MORI

**Table 7.0.1 – Difficulties making payments to the property manager – by leaseholder type**

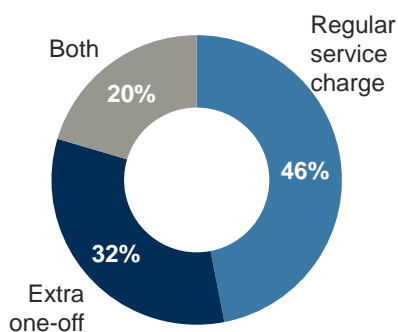
	Private properties (586) (column %)	LAs (178) (column %)	HAs (124) (column %)	Retirement (131) (column %)	RTMC/ RMC (171) (column %)	Non- RTMC/RMC (456) (column %)
Yes	4%	11%	6%	1%	1%	6%
No	95%	88%	94%	98%	99%	93%
Don't know/can't remember	*	1%	-	1%	-	*

Base: All leaseholders (1,050) 30 April – 1 June 2014 \* indicates a figure greater than 0 but less than 0.5%

Among the 59 leaseholders participating in the survey who have had difficulty making a payment, just fewer than half (46%) say this was with their regular service charge, slightly less than a third (32%) said it was an extra one-off payment, and a fifth (20%) said it was both. However given the small base sizes caution should be applied to interpretation of these findings.

Figure 7.0.3 – Type of payment leaseholders faced difficulty with

**RES3. Was this the regular service charge payment, or an extra one-off amount to pay for major works on top of what you normally pay, or both of these?**



Base: All leaseholders paying service charge unable to pay in past 2 years (59)

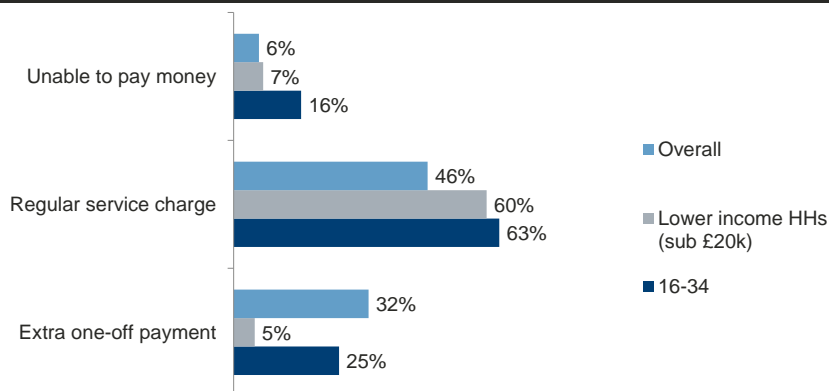
Source: Ipsos MORI

The survey shows younger participants (those aged 25-34) as more likely to have faced difficulty in making a payment to the property manager over the last two years.

Figure 7.0.4 – Proportion of respondents unable to pay money owed to the property manager in the last two years by low income and youngest age band.

**RES2. And thinking about the past 2 years have you ever been unable to pay any money that you have owed... or not?**

**RES3. Was this the regular service charge payment, or an extra one-off amount to pay for major works on top of what you normally pay, or both of these?**



Base: All leaseholders paying service charge (1050)

Source: Ipsos MORI

The main reasons given for individuals having difficulty paying were that they simply could not afford it or the sums owed were too large (19 and 13 participants respectively). In addition, 11 respondents said the reason they could not make a payment was due to unexpected events such as redundancy or sickness. Among the 59 leaseholders who had faced difficulty making a payment, 31 reported they were initially asked to pay the

full amount immediately though some of these respondents were then allowed to pay the amount over a period of time (46 of the 59 were allowed to pay over time).

# 8 Appendices



## 8 Appendices

### Appendix A: Research objectives

The tables below give more detail on the research objectives of the survey and are taken from the CMA's Statement of Requirements (SoR) which is embedded below.



CMA SoR.pdf

<b>Research objectives: Set 1:</b>
<b>Dealings with managing agents and landlords</b>
<b>Measure objectively the extent to which leaseholders:</b>
<ul style="list-style-type: none"> <li>Understand their legal rights to information and consultation.</li> </ul>
<ul style="list-style-type: none"> <li>Are provided by managing agents with information that allows them to understand the basis of current charges and any likely variation in future charges.</li> </ul>
<ul style="list-style-type: none"> <li>Lack of information mean that some leaseholders are in a poor position to plan for future charges increasing the likelihood that they are unable to pay? Does this impact more on certain vulnerable groups of leaseholders such as elderly/infirm/those on low incomes?</li> </ul>
<ul style="list-style-type: none"> <li>Can determine on the basis of information provided by managing agents whether service charges, management fees and reserve funds allow them to reach an informed view about whether or not they are set at reasonable levels?</li> </ul>
<ul style="list-style-type: none"> <li>Consider the level of service they receive from the managing agent is of sufficient standard.</li> </ul>
<ul style="list-style-type: none"> <li>Are consulted on proposed major building works and can influence the choice of contractors.</li> </ul>
<ul style="list-style-type: none"> <li>Are able to communicate effectively with managing agents or landlords about any issues or concerns they have about the level of services or the overall management of the property.</li> </ul>
<ul style="list-style-type: none"> <li>Find that managing agents/landlords have systems in place to deal effectively with any issues or concerns that have been raised about service levels.</li> </ul>
<ul style="list-style-type: none"> <li>Differ in their ability to challenge the actions of managing agents/landlords and for what reasons.</li> </ul>
<ul style="list-style-type: none"> <li>Consider that their incentives, in relation to upkeep of the property, differ from those of managing agents and landlords</li> </ul>

**Research objectives: Set 2:**

**Making Complaints to managing agents/landlords and use of Independent Bodies that seek to resolve grievances**

**Measure objectively the extent to which leaseholders:**

- Have complained to the managing agent/landlord.
- Found that the managing agent/landlord had a clear complaints handling procedure and resolved the matter in a reasonable timescale
- Whose complaints were not resolved were aware of their legal position and rights to take grievances to First-tier Tribunal (Leaseholder Valuation Tribunal) or Ombudsmen schemes
- Whose complaints were not resolved would have liked to use the First-tier Tribunal (Leaseholder Valuation Tribunal) but were unable to do so for some reason.
- Whose complaints were not resolved used the First-tier Tribunal (Leaseholder Valuation Tribunal). How costly and time consuming did they find it? Did they employ lawyers or did they represent themselves? Did the Tribunal find in their favour?
- Whose complaints were not resolved used Ombudsmen scheme to try and resolve the matter and how effective they found it.
- Have a view as to what might be done to improve the system for resolving complaints against managing agents.

**Research objectives: Set 3:**

**Switching to another managing agent/contractors**

**Measure objectively the extent to which leaseholders:**

- Are aware of Right to Manage (RTM) and ability to change managing agent.
- Had to undertake a number of steps to exercise their RTM and any reasons why they were unable to do so?
- Where RTM has been exercised what experience of qualifications do leaseholders have to manage properties?
- Have an effective mechanism in place to come together to discuss issues and concerns about the management of the property.
- Have changed or are taking steps to switch to another managing agent. Or any reasons that prevented them from doing so.
- Are aware of what managing agents offer in terms of management fees and services.
- Have had a good or bad experience changing to another managing agent.
- Have changed or are taking steps to switch to another managing agent. Or any reasons that prevented them from doing so.
- Have had a good or bad experience changing to another managing agent.

## Appendix B: Glossary of key terms, definitions and acronyms

<b>Leaseholder</b>	A leaseholder is someone who has bought a property, but does not own the surrounding land or the building that their property is in. Instead, they have bought the right to live in their home for a fixed period of time. While their landlord (the freeholder) has responsibility for building structure and communal areas, the leaseholder is responsible for contributing towards the cost of repairs and maintenance of these.
<b>Freeholder</b>	A freeholder is someone who has bought the property including the surrounding land and the building the property is in. They own the property and provide a long term lease to the leaseholder.
<b>Buy-to-let</b>	For the purposes of this survey this phrase is used to denote all cases where the leaseholder is not resident but lets the property to tenants whether or not originally bought for that purpose.
<b>Local authority / housing association (social sector)</b>	Sometimes the owner of the land and building (the freeholder) may be a local authority or housing association. While these predominantly cater for social tenants, some social sector properties are owned by the resident on a leasehold arrangement. They work in essentially the same way as someone owning a flat in the private sector, although it is the council or housing association which will provide the upkeep of communal areas.
<b>Retirement developments</b>	In some cases, someone may buy the leasehold to a property within a retirement development. These are developments specifically aimed at retired people. For the purpose of this questionnaire, retirement developments are properties where there is a minimum age condition (e.g. 55+) and include housing without support and housing with support.
<b>Residential property management services (RPMS)</b>	<p>This is the maintenance and upkeep of communal areas of the building, usually paid for by the leaseholders through a service charge. This is typically carried out by a managing agent on behalf of the freeholder.</p> <p>The managing agent is remunerated through the management fee element of the overall service charge agreed with the landlord. Leaseholders may also pay regular instalments into a 'reserve fund'. The reserve fund is a mechanism for funding significant planned expenses, such as roof maintenance or other major works.</p> <p>The precise services managed by the agent vary, but are likely to include some or all of:</p> <p>Services</p> <ul style="list-style-type: none"> <li>• Lighting, and cleaning of shared areas</li> <li>• Provision of central heating</li> <li>• Servicing of: lifts; security, alarm and entry</li> </ul>

	<p>systems; heating systems etc.</p> <ul style="list-style-type: none"> <li>• Servicing of emergency call systems</li> <li>• Warden services (for retirement developments)</li> </ul> <p>Repair and Maintenance</p> <ul style="list-style-type: none"> <li>• Buildings decoration and basic maintenance of shared areas</li> <li>• Buildings repair and major maintenance</li> </ul> <p>Other</p> <ul style="list-style-type: none"> <li>• Building surveys – to ascertain the need for works</li> <li>• Insurance</li> </ul>
<b>Complaint</b>	Any correspondence or communication that indicates that there was an issue with the provision of services (either in terms of delivery or cost). Note that each communication related to the initial complaint is to be considered part of the original complaint and should not be counted again.
<b>Managing Agent</b>	Alternative descriptor for property manager - a person or organisation that acts on behalf of the Landlord (the freeholder), or RTM/RMC to provide property management services.
<b>Residents' Management Company (RMC)</b>	A limited company owned by the leaseholders of a development has legal responsibility to provide residential property management services and the right to collect Service Charges.
<b>Right to Manage (RTM)</b>	RTM is a group right for leaseholders of flats to allow them to take control of the management of the development they live in and appoint their own managing agent without having to buy the freehold.
<b>Right to Manage Company (RTMC)</b>	An RTMC is formed when a group of leaseholders of flats take control of the management of the development they live in and appoint their own managing agent without having to buy the freehold. RTMC is defined in the Commonhold and Leasehold Reform Act 2002. Please note this is different to a Residents' Management Company.
<b>Service Charge</b>	An amount payable by a leaseholder as part of, or in addition to ground rent, in respect of services, repairs, maintenance, insurance, improvements and costs of management.

## Appendix C: Questionnaire changes

### 1st May

Added code 4 (shared ownership) to BK3 and BK3\_2

### 2nd May

Added text substitutions at SW5 and SW6

SW5. Sometimes leaseholders manage the property through a [IF CODE 1 at SW3 use 'Right to Manage Company (RTMC)' ELSE USE 'Residents Management Company (RMC)']. From what you know is there a Residents Management Company at [the property at [BK1 TEXT/the property we have been talking about], or not?

SINGLE CODE

1. Yes
  2. No
- Don't know

ASK SW6 IF SW5 = 1

SW6. And, as far as you know, when was this setup, or has the property always been managed by a [IF CODE 1 at SW3 use 'Right to Manage Company (RTMC)' ELSE USE 'Residents Management Company (RMC)']. Residents Management Company?

SINGLE CODE

1. Within past 2 years
  2. Between 3 and 5 years
  3. Between 6 and 10 years
  4. Between 10 and 20 years
  5. 21 years or more
  6. Always been managed by Residents Management Company
- Don't know

### 2nd May

COM12 instruction changed to DO NOT READ OUT.

### 21st May

Removed code 'shared ownership' from BK3 and subsequently removed question BK3\_2

### 21st May

Added text substitution at SW5

SW5. Sometimes leaseholders manage the property through a [IF CODE 1 at SW3 use 'Right to Manage Company (RTMC)' ELSE USE 'Residents Management Company (RMC)']. From what you know is there a [IF CODE 1 at SW3 use 'Right to Manage Company (RTMC)' ELSE USE 'Residents Management Company (RMC)'] at [the property at [BK1 TEXT/the property we have been talking about], or not?

### 21st May

Changed routing from ASK SW5 IF BK3 = 1 or 2 to ASK SW5 IF BK3 = 1 or 2 and SW3 ≠ 1

## Appendix D: Questionnaire

### INTRO AND SCREENER

#### INTERVIEWER READ OUT

**Good morning/afternoon/evening, my name is XXX calling from Ipsos MORI the research organisation.**

**We are conducting a study on behalf of the CMA, to better understand leaseholder's experiences of the management of properties.**

**I'd like to assure you that all of the information you provide will be treated in the strictest confidence and used for research purposes only. It will not be possible for our client to identify any particular individuals or addresses in the results.**

**Would you be able to help us with our research just now?**

**INTERVIEWER NOTE - If respondent is unsure who the CMA is please explain that they are the Competition and Markets Authority which was known as the Office of Fair Trading.**

#### **EMAIL CONFIRMATION**

Dear Sir/Madam

#### **Research among leaseholders**

The Competition and Markets Authority is seeking to build a detailed understanding of leaseholder's experiences of the management of properties such as flats, apartments or maisonettes that share communal parts of buildings.

To help achieve this, Ipsos MORI has been commissioned to conduct research among the target audience. We hope to hear views from people like you and aim to enhance our understanding of your needs and experiences, and use the results as part of a review investigating how well the market for managing common areas of residential flats, apartments and maisonettes in England and Wales is working. The CMA wants to assess whether leaseholders are receiving adequate services, value for money and that actions are taken to maintain the property.

Ipsos MORI would like to conduct a short telephone interview to better understand leaseholder's experiences of the management of properties.

Ipsos MORI is an independent research organisation and your responses will be completely confidential. One of Ipsos MORI's professional telephone interviewers will give you a call to agree a suitable time and date. The interview will take about 20 minutes, depending on your pattern of answers.

If you have any queries on this please contact the Ipsos Project Co-ordinator, James Stannard 0207 347 3914, james.stannard@ipsos.com who is managing the interviewing process. If you would like to arrange a time, or you would rather not be contacted, then please let James know.

Thank you in anticipation of your help. I do hope you will be able to participate as your views are greatly valued.

Yours sincerely



Ben Marshall, Research Director

IF ASKED:

The interview will take 15-20 minutes depending on your answers.”

**S1. We are interested in speaking to [NAME FROM SAMPLE]. Are they available please?**

SINGLE CODE

1. Yes
2. No

ASK IF S1=2, OTHERWISE S3

**S2. Is there someone else you think it would be appropriate for me to talk to?**

INTERVIEWER IF NECESSARY: The subject we are researching is the management of properties, like flats, apartments or maisonettes that share communal parts of the building, like hallways, stairs and roof.

SINGLE CODE

1. Yes – MAKE APPOINTMENT
2. No – CLOSE

ASK ALL

**S3. Thinking about the main property where you live most of the time, which one, if any, of the following best describes how you occupy it. Are you...**

SINGLE CODE

IF DON'T KNOW, PROBE: From what you know or have heard, does someone in the property pay a monthly mortgage, or do they pay rent to a landlord to live here, or perhaps they have paid off the mortgage in the past and do not have to anything to pay anyone ?

READ OUT

1. The owner of the property either outright or on a mortgage – GO TO S4
2. Buying on a mortgage as a shared owner (i.e. part-rent, part-own) – GO TO S4
3. Renting from a private landlord – GO TO S7
4. Renting from a social landlord such as a housing association or council – GO TO S7
5. Other (SPECIFY) – GO TO S7
6. Don't know – GO TO S7

ASK IF CODE 1 or 2 at S3, OTHERWISE S7

**S4. Still thinking about the main property where you live most of the time, are you a leaseholder or are you a freeholder, or are you both?**

A leaseholder is someone who owns a property on a long lease giving them the right to live in the property for a specified number of years on a lease, usually set at 99, 125 or 999 years to start with. The length of the lease decreases year by year until it eventually runs out. The lease sets the leaseholder's and freeholder's rights and obligations.

A freeholder owns the freehold of a property which includes the building, and if there are common parts of the building will include these. They might be an individual, business, housing association or a local council.

SINGLE CODE



1. Leaseholder – GO TO S5
2. Freeholder – GO TO S7
3. Leasehold with a share of the freehold – GO TO S5
4. Don't know – GO TO S7

ASK IF S4 = 1 or 3, OTHERWISE S7

**S5. Still thinking about the main property where you live most of the time, is it...**  
SINGLE CODE

READ OUT

1. A flat or apartment in a block of flats/apartments – GO TO S6
2. A flat within a converted house – GO TO S6
3. A maisonette – GO TO S6
4. A property which is separate from others and does not contain dwellings or flats within it – this might be a house or bungalow – GO TO S7
5. Some other type of property – GO TO S7
6. Don't know

ASK ALL S5 = 1-3, OTHERWISE S7

**S6. Still thinking about the main property in England or Wales, do you receive property management services there – that is, do you pay a service charge or fee?** This might be for maintenance or upkeep of the building and communal areas like shared stairs or hallways or for other shared services such as grass cutting or cleaning.  
SINGLE CODE

1. Yes – receive property management services
2. No – no property management services
3. No – not in England and Wales
4. Don't know

ASK ALL

**S7. Some people own a flat, apartment or maisonette which they do not live in, and rent them out to tenants, friends or family. How about you? Do you own a flat, apartment or maisonette which you do not live in and which you rent out?**  
SINGLE CODE

1. Yes – GO TO S8
2. No – CLOSE IF S6 NOT EQUAL TO 1, OTHERWISE GO TO Q1
3. Don't know – CLOSE IF S6 NOT EQUAL TO 1, OTHERWISE GO TO Q1

ASK IF 1 AT S7, OTHERWISE GO TO ELIGIBILITY SUMMARY

**S8. And for how many, if any, leaseholder properties based in England or Wales do you receive property management services?**

INTERVIEWER IF NECESSARY:

A leaseholder is someone who owns a property on a lease, typically for 99, 125 or 999 years. Property management services might include maintenance or upkeep of communal areas or other services such as shared stairs or a hallway.

RECORD NUMBER

1. None of these

Don't know

IF S6 NOT EQUAL TO 1 AND S8 > 4 CLOSE



## ELIGIBILITY SUMMARY:

S6 = 1 – own property

S8 = 1-4 – buy to let

## CLOSING STATEMENT:

## READ OUT

We are looking for other types of people on this occasion and do not need to ask you any further questions. Thank you for your time.

**BACKGROUND****READ OUT**

IF S6 = 1 AND S7 = 2/3: For the rest of this interview, please think about the main property where you live.

IF S6 = 1 AND S7 = 1 AND S8 = > 4: For the rest of this interview, please think about the main property where you live.

IF S7 = 1 AND S8 = 1 to 4: For the rest of this interview, please think about the most recent leaseholder property you bought but do not live in.

IF S7=1 and S8 = 0 and S6=1 For the rest of this interview, please think about the main property where you live.

## ASK ALL

**BK1. Just so I can refer back to it, what is the name of the street this property is on?**

## RECORD NAME

1. Don't know/can't remember
2. Refused

## ASK ALL

**BK2. And the postcode?**

## RECORD POSTCODE

INTERVIEWER: COLLECT AS MUCH OF POSTCODE AS POSSIBLE

1. Don't know/can't remember
2. Refused

## ASK ALL

**BK3. Please can you tell me who owns the freehold of the property? A freeholder may be an individual, business, housing association or a local council that owns the freehold of a property which includes the building, and if there are common parts of the building, such as a garden, will include these.**

## SINGLE CODE

## READ OUT

1. Private individual or company
2. Housing association
3. Local council
4. Someone else (SPECIFY)
5. Don't know

## ASK ALL

**BK4. For how long have you been a leaseholder of this property?**

RECORD EXACT NO. OF YEARS AND CODE BAND

1. 2 years or less
2. Between 3 and 5 years
3. Between 6 and 10 years
4. 11 years or more
5. Don't know

## ASK ALL

**BK5. And please could you tell me if it is in a retirement development or not?**

SINGLE CODE

1. Yes
2. No
3. Don't know

## ASK BK6 IF YES, code 1 at BK5

**BK6. And is specialist personal or medical care provided by the freeholder or property manager?**

1. Yes
2. No
3. Don't know

## ASK ALL

**BK7. Still thinking about [the property at [BK1 TEXT/the property we have been talking about], as far as you are aware, how many property units are there within the development (for example how many flats are there in your block)?**

INTERVIEWER IF NECESSARY: IF EXACT NUMBER NOT KNOWN ESTIMATE IS FINE

RECORD NUMBER

## ASK ALL

**BK8. As far as you are aware, are other residents in the development...**

SINGLE CODE

## READ OUT

1. Mainly owner-occupiers
2. Mainly renting from a private landlord
3. Mainly renting from the council or a housing association
4. None of these, it's a mixture of different groups
5. Don't know

## ASK ALL

**BK9. Still thinking about [the property at [BK1 TEXT/the property we have been talking about], who manages and looks after the common parts of the building, like hallways, stairs and the roof in the development in which the property is based? Is it?**

SINGLE CODE

## READ OUT

1. **Property management company or managing agent**
2. **Housing association**
3. **Local council or organisation providing housing services on behalf of a council**
4. **Someone else (SPECIFY)**
5. **Don't know**

## ASK ALL

**BK10. What is the name of the [BK9TEXT/IF DK AT BK9 use 'PROPERTY MANAGER']?**

RECORD NAME

1. **Don't know/can't remember**
2. **Refused**

IF CODES 1/2 AT BK10, SET TO SUBSTITUTE [BK10 TEXT] WITH [BK9 TEXT]

ASK IF S8 = 1-4

**BK11. You said earlier that you rented out the property at [BK1 TEXT]. Which of these best applies to how often you visit the property?**

## READ OUT

- a. **About once a week**
- b. **About once a fortnight**
- c. **About once a month**
- d. **About once every three months**
- e. **About once every six months**
- f. **About once a year**
- g. **Less often**
- h. **Never**
- i. **Don't know**

ASK IF S8 =1-4

**BK12. And, how often are you in touch with the tenants at [the property at [BK1 TEXT/the property we have been talking about]?**

## READ OUT

- a. **About once a week**
- b. **About once a fortnight**
- c. **About once a month**
- d. **About once every three months**
- e. **About once every six months**
- f. **About once a year**
- g. **Less often**

- h. Never
- i. Don't know

## ASK ALL

**BK13. Do you pay a regular service charge for the services provided by [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER']?**

## SINGLE CODE

- 1. Yes
- 2. No
- 3. Don't know/can't remember

## ASK BK14 IF CODE 1 AT BK13

**BK14. Approximately, how much do you pay in service charge? Please do not include any one-off payments or ground rent charges.**

## INTERVIEWER IF NECESSARY: AN ESTIMATE OF THE MOST RECENT SERVICE CHARGE IS FINE

## RECORD NUMBER

- 1. Don't know/can't remember

## ASK IF NUMBER PROVIDED AT BK14

**BK15. For what period does that amount cover?**

## SINGLE CODE

- 1. Month
- 2. Quarter
- 3. Year
- 4. Other (SPECIFY)
- 5. Don't know

## ASK IF CODE 1 AT BK13

**BK16. Thinking about the service charge, does [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] provide the following or not? Firstly...**

## READ OUT

- a. ...a summary of the costs on which the charge is calculated?
- b. ...annual accounts?
- c. ...receipts and other documents which show how the monies raised have been spent?

## SINGLE CODE

- 1. Yes
- 2. No
- 3. Don't know/can't remember

## ASK IF CODE 1 AT BK13

**BK17. Does the service charge include payment into a maintenance fund or account – sometimes called a reserve or sink fund – that everyone pays into to fund major works in the future?**

## SINGLE CODE

- 1. Yes
- 2. No
- 3. Don't know/can't remember

## ASK ALL

**BK18.** In the last 3 years, have you had to pay **extra** one-off amounts to pay for major works?

SINGLE CODE

1. Yes
2. No
3. Don't know/can't remember

ASK BK19 IF YES, CODE 1 AT BK18

**BK19.** On that occasion did the managing agent do the following or not. Firstly...

## RANDOMISE

- a. ...provide leaseholders with details of proposed major works and estimates for the work?
- b. ...provide leaseholders with the opportunity to respond to these proposals and the estimates?
- c. ...explain why the contractor was selected if they did not choose the contractor that provided the cheapest estimate?

SINGLE CODE

1. Yes
2. No
3. Don't know/can't remember

IF YES, CODE 1 AT BK18

**BK20.** Still thinking about that time, how satisfied or dissatisfied were you with the following...?

## READ OUT

- a) The works being carried out in a timely manner
- b) The quality of the work carried out

1. Very satisfied
2. Fairly satisfied
3. Neither satisfied nor dissatisfied
4. Fairly dissatisfied
5. Very dissatisfied
6. Don't know
7. Can't remember

**DEALINGS WITH PROPERTY MANAGERS**

## ASK ALL

**PM1.** Thinking again about [the property at [BK1 TEXT/the property we have been talking about], I am going to read out a list of things that [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] may or may not be responsible for. Please tell me if they are responsible for...

SINGLE CODE

RANDOMISE ORDER OF a)-g)

## READ OUT

- a. Upkeep of outside areas such as gardens or grounds e.g. grass cutting
- b. Maintenance and repairs of internal common areas e.g. hall, stairs, lifts
- c. Cleaning of internal common areas e.g. hall, stairs, lifts

- d. **Maintenance and repairs to external common areas e.g. roof, gutters, outside walls and windows**
- e. **Provision of porter, warden or concierge services**
- f. **Collection of service charges and preparation of accounts**
- g. **Organising buildings insurance**

- 1. Yes,
- 2. No,
- 7. Don't know/unsure
- 8. Not applicable

ASK PM2a-g IF PM1a-g = 1

**PM2. In general how would you rate the standard of these services provided by [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] ...?**

SINGLE CODE

RANDOMISE ORDER

READ OUT

- a. **Upkeep of outside areas such as gardens or grounds e.g. grass cutting**
- b. **Maintenance and repairs of internal common areas e.g. hall, stairs, lifts**
- c. **Cleaning of internal common areas e.g. hall, stairs, lifts**
- d. **Maintenance and repairs to external common areas e.g. roof, gutters, outside walls and windows**
- e. **Provision of porter, warden or concierge services**
- f. **Collection of service charges and preparation of accounts**
- g. **Level of buildings insurance**

Would you rate them as...

READ OUT

- 1. **Very good**
- 2. **Fairly good**
- 3. **Neither good nor poor**
- 4. **Fairly poor**
- 5. **Very poor**
- 6. Don't know
- 7. Not applicable

ASK ALL

**PM3. Now thinking about repairs and maintenance, how would you rate [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] in terms of the following ...?**

SINGLE CODE

RANDOMISE ORDER

READ OUT

- a. **Acting promptly when repairs or maintenance are required**
- b. **Consulting leaseholders for their views on major work**
- c. **Consulting leaseholders for their views on which contractors to use**
- d. **Providing information on what the service charge has been spent on**
- e. **Providing information about planned major works**

Would you say they are...

READ OUT

1. **Very good**
2. **Fairly good**
3. **Neither good nor poor**
4. **Fairly poor**
5. **Very poor**
6. Don't know
7. Not applicable

#### ASK ALL

**PM4. Taking everything into account, would you say that the overall service provided by [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] is...?**

#### SINGLE CODE

1. **Very good**
2. **Fairly good**
3. **Neither good nor poor**
4. **Fairly poor**
5. **Very poor**
6. Don't know
7. Not applicable

#### ASK ALL

**PM5. To what extent, if at all, do you agree or disagree that [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] provides value for money?**

#### SINGLE CODE

1. Strongly agree
2. Tend to agree
3. Neither agree nor disagree
4. Tend to disagree
5. Strongly disagree
6. Don't know

#### ASK IF PM5 = 4/5

**PM6. Why do you say that?**

PROBE: **What else?**

#### MULTICODE

#### Communication

1. I never hear from them
2. Residents are not kept informed about what is going on

#### Services

3. Services (unspecified) are poor
4. Repair and maintenance are performed to a low standard
5. Repairs and maintenance are carried out unnecessarily
6. Repairs and maintenance are not carried out when required

#### Costs

7. Cost of management services is too high
8. Cost of management services keeps rising
9. Cost of repairs and maintenance are too high
10. The managing agent does not do enough to get good deals on services like cleaning
11. The cost of insurance is excessive

12. When repairs are needed, the managing agent does not make much effort to get good value for money on behalf of the residents
13. Other (SPECIFY)
14. Don't know

ASK PM7a-e IF PM1a-e = 1

**PM7. Can I check, from what you know or have heard, does [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] ever use contractors to undertake the following – that is, do they pay a company to do these things?**

MULTICODE

RANDOMISE ORDER

READ OUT

- a. Upkeep of outside areas such as gardens or grounds e.g. grass cutting
  - b. Maintenance and repairs of internal common areas e.g. hall, stairs, lifts
  - c. Cleaning of internal common areas e.g. hall, stairs, lifts
  - d. Maintenance and repairs to external common areas e.g. roof, gutters, outside walls and windows
  - e. Provision of porter, warden or concierge services
  - f. None of these
- Don't know

ASK PM8 IF CODES 1-5 AT PM7

**PM8. Overall, would you say that the quality of contractors is...**

SINGLE CODE

READ OUT

1. Very good
2. Fairly good
3. Neither good nor poor
4. Fairly poor
5. Very poor
6. Don't know
7. Not applicable

ASK ALL

**PM9. And can I just check, do leaseholders at [the property at [BK1 TEXT/the property we have been talking about] come together to discuss any issues and concerns about the management of their properties, perhaps at a regular meeting or through a residents committee?**

SINGLECODE

1. Yes
2. No
3. Don't know

## **SWITCHING**

READ OUT

**Now on a different subject...**

ASK IF BK3=1 [PRIVATE]

**SW1. Right to Manage allows leaseholders with communal facilities to take control**



of the management of the buildings where they live. It gives them the right to appoint their own managing agent. Before this interview, were you aware of this or not?

SINGLE CODE

1. Yes, was aware
2. No, was not aware
3. Don't know

ASK SW2 IF BK3 = 1

**SW2. And from what you know or have heard, have leaseholders at [the property at [BK1 TEXT/the property we have been talking about]] done or tried to do this, or not?**

SINGLE CODE

1. Yes, have tried
2. No, have not tried
3. Don't know

ASK IF CODE 1 AT SW2

**SW3. And were they successful or not?**

SINGLE CODE

1. Yes, successful
2. No, not successful
3. Don't know

ASK SW4 IF CODE 1 AT SW3

**SW4. As far as you know, WHEN did this happen?**

SINGLE CODE

1. Within past 2 years
2. Between 3 and 5 years
3. Between 6 and 10 years
4. Between 10 and 20 years
5. 21 years or more
6. Always been managed by a Right to Manage Company
- Don't know

**RMC/RTMC**

ASK SW5 IF BK3 = 1 or 2 and SW3 ≠ 1

**SW5. Sometimes leaseholders manage the property through a 'Residents Management Company (RMC)'. From what you know is there a 'Residents Management Company (RMC)' at [the property at [BK1 TEXT/the property we have been talking about]], or not?**

SINGLE CODE

1. Yes
2. No
3. Don't know

ASK SW6 IF SW5 = 1

**SW6. And, as far as you know, when was this setup, or has the property always been managed by a 'Residents Management Company (RMC)'?**

SINGLE CODE

1. Within past 2 years

2. Between 3 and 5 years
3. Between 6 and 10 years
4. Between 10 and 20 years
5. 21 years or more
6. Always been managed by Residents Management Company  
Don't know

ASK SW7 IF SW2 = 1 OR SW5 = 1

**SW7. You said that leaseholders have taken control or tried to take control of the management of the buildings where they live and appoint their own managing agent. What was the reason for this?**

OPEN ENDED

Don't know

ASK SW8 IF SW2 = 1 OR SW5=1

**SW8. And from what you know or have heard, was the process of leaseholders taking control or trying to take control of the management of the buildings where they live easy or difficult? Was it...**

SINGLE CODE

READ OUT

1. **Very easy**
2. **Fairly easy**
3. **Fairly difficult**
4. **Very difficult**
5. Don't know/can't remember

ASK IF SW8 = 3/4

**SW9. And what specifically would you say was difficult about it?**

OPEN ENDED QUESTION

Don't know

ASK SW10 IF SW3 = 1 OR SW5 =1

**SW10 Would you say that since this happened, management of the properties and the communal areas has got better, got worse or has it stayed the same?**

1. Got much better
2. Got a little better
3. Stayed the same
4. Got a little worse
5. Got much worse
6. Don't know/not sure

ASK SW11 IF SW3 = 1 OR SW5=1

**SW11. And since this happened, has the level of service charges for the properties and the communal areas increased, decreased or stayed the same?**

1. Increased
2. Decreased
3. Stayed the same
4. Don't know/not sure

TMO

ASK IF BK3 = 3

**SW12.** Sometimes leaseholders of local council properties manage the property through a Tenant Management Organisation (TMO). From what you know is there a Tenant Management Organisation at [the property at [BK1 TEXT/the property we have been talking about], or not?

SINGLE CODE

1. Yes
2. No
3. Don't know

ASK SW13 IF SW12 = 1

**SW13.** Thinking again about [the property at [BK1 TEXT/the property we have been talking about], Which of these, if any, is the Tenant Management Organisation responsible for. Please tell me if they are responsible for...

MULTICODE

RANDOMISE ORDER OF a-g

READ OUT

- a. Upkeep of outside areas such as gardens or grounds e.g. grass cutting
- b. Maintenance and repairs of internal common areas e.g. hall, stairs, lifts
- c. Cleaning of internal common areas e.g. hall, stairs, lifts
- d. Maintenance and repairs to external common areas e.g. roof, gutters, outside walls and windows
- e. Provision of porter, warden or concierge services
- f. Collection of service charges and preparation of accounts
- g. Organising buildings insurance
- Don't know
- None of these

ASK SW14 IF SW12 = 1

**SW14.** And, as far as you know, when was the Tenant Management Organisation (TMO) set up, or has the property always been managed by a Tenant Management Organisation? To clarify, sometimes leaseholders of local council properties manage the property through a Tenant Management Organisation.

SINGLE CODE

1. Within past 2 years
2. Between 3 and 5 years
3. Between 6 and 10 years
4. Between 10 and 20 years
5. 21 years or more
6. Always been managed by TMO
7. Don't know

ASK IF SW12 = 1

**SW15.** You said that there is a Tenant Management Organisation at [the property at [BK1 TEXT/the property we have been talking about]. From what you know or have heard, what was the reason for this being setup?

OPEN ENDED

**INTERVIEWER IF NECESSARY:** Don't know

ASK IF SW14 = 1-5

**SW16** And from what you know or have heard, was the process of setting up a

**Tenant Management Organisation easy or difficult? Was it...****SINGLE CODE****READ OUT**

1. **Very easy**
2. **Fairly easy**
3. **Fairly difficult**
4. **Very difficult**
5. Don't know/can't remember
6. Not applicable

ASK SW17 IF SW16 = 3/4

**SW17. And, what specifically would you say was difficult about it?****OPEN ENDED**

Don't know

ASK SW18 IF SW12 = 1 AND SW14 = 1-5

**SW18. Would you say that since this happened, management of the properties and the communal areas has got better, got worse or has it stayed the same?**

1. Got much better
2. Got a little better
3. Stayed the same
4. Got a little worse
5. Got much worse
6. Don't know/not sure
7. Not applicable

ASK SW19 IF SW12 = 1 AND SW14 = 1-5

**SW19. And since this happened, has the level of service charges for the properties and the communal areas increased, decreased or stayed the same?**

1. Increased
2. Decreased
3. Stayed the same
4. Don't know/not sure

**REDRESS/MAKING COMPLAINTS****READ OUT****Now on a different subject...**

ASK ALL

**COM1. Still thinking about [the property at [BK1 TEXT/the property we have been talking about], have you ever had any reasons to be dissatisfied with [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER']?**

**SINGLE CODE**

1. Yes
2. No
3. Don't know/can't remember

ASK IF COM1 = 1

**COM2. Thinking about the last time you had a reason to be dissatisfied with [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'], which of these, if any, was that reason about?**

SINGLE CODE

READ OUT

RANDOMISE

1. Upkeep of outside areas such as gardens or grounds e.g. grass cutting etc.
2. Maintenance and repairs of internal common areas e.g. hall, stairs, lifts
3. Cleaning of internal common areas e.g. hall, stairs, lifts
4. Maintenance and repairs to external common areas e.g. roof, gutters, outside walls and windows
5. Something else (specify)
6. Don't know/can't remember

ASK IF COM1 = 1

**COM3. And what specifically was the issue about?**

Communication

1. I never hear from them
2. Residents are not kept informed about what is going on
3. Quality of information is poor

Services

4. Important services are not provided
5. Services (unspecified) are poor
6. Repairs and maintenance are performed to a low standard
7. Repairs and maintenance are carried out unnecessarily
8. Repairs and maintenance are not carried out when required

Costs

9. Cost of management services is too high
10. Cost of management services keeps rising
11. Cost of repairs and maintenance are too high
12. Insufficient information provided on service charges or fees
13. Mistakes in billing
14. The managing agent does not do enough to get good deals on services like cleaning
15. The cost of insurance is excessive
16. When repairs are needed, the managing agent does not make much effort to get good value for money on behalf of the residents
17. Other (SPECIFY)
18. Don't know

ASK IF COM1 = 1

**COM4. And did you contact [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] about the issue yourself, did someone else such as another leaseholder or a residents group contact them, or did no-one contact them?**

SINGLE CODE

1. Respondent contacted
2. Someone else contacted.
3. No-one contacted them

4. Don't know

ASK COM5 IF COM4 = 1

**COM5. For which of these reasons, if any, did you contact them?**

READ OUT

MULTICODE

READ OUT

1. To find out what was happening
2. To obtain information
3. To express my dissatisfaction
4. To make a complaint
5. To find out where I could get advice or support
6. Something else (SPECIFY)
7. None of these
8. Don't know/can't remember

ASK COM6 IF COM1 = 1 and COM4 = 2/3

**COM6. Thinking about the last time you were dissatisfied but did not personally contact [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'], what prevented you from doing so?**

MULTICODE, DO NOT READ OUT

1. Someone else in the properties/block contacted them
2. The problem was resolved before I got the chance
3. I didn't know how to go about contacting them
4. The process of contacting them was too difficult
5. I didn't have time
6. I just didn't get around to it
7. I didn't think it would be worthwhile as nothing would be done
8. I didn't think it was serious enough
9. Other (SPECIFY)
10. Don't know/can't remember

ASK IF COM4 = 1

**COM7. Still thinking about the last time you contacted [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] how satisfied or dissatisfied were you with the following...?**

SINGLE CODE

RANDOMISE ORDER

READ OUT

- a. [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] being clear about how they would deal with you
- b. The time it took to deal with what you contacted them about
- c. The ease of getting through to speak to the right person

READ OUT

1. Very satisfied
2. Fairly satisfied
3. Neither satisfied nor dissatisfied
4. Fairly dissatisfied
5. Very dissatisfied
6. Too early to say as the issues has not yet been resolved or is ongoing

## 7. Don't know

### ASK COM7 IF COM4 = 1

**COM7out.** And how satisfied or dissatisfied were you with the outcome, or has there not yet been an outcome?

#### SINGLE CODE

#### READ OUT

1. Very satisfied
2. Fairly satisfied
3. Neither satisfied nor dissatisfied
4. Fairly dissatisfied
5. Very dissatisfied
6. There has not yet been an outcome
7. Don't know

### ASK COM8 IF COM7out = 1-5

**COM8.** Taking everything into account, and regardless of the outcome, how satisfied or dissatisfied were you with the way in which your issue was handled by [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER']?

#### SINGLE CODE

#### READ OUT

1. Very satisfied
2. Fairly satisfied
3. Neither satisfied nor dissatisfied
4. Fairly dissatisfied
5. Very dissatisfied
6. Too early to say as the issues has not yet been resolved or is ongoing
7. Don't know

### ASK COM8out IF COM7out = 6

**COM8out.** Taking everything into account how satisfied or dissatisfied are you with the way in which your issue has been handled by [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] up to this point?

#### SINGLE CODE

#### READ OUT

1. Very satisfied
2. Fairly satisfied
3. Neither satisfied nor dissatisfied
4. Fairly dissatisfied
5. Very dissatisfied
6. Too early to say as the issues has not yet been resolved or is ongoing
7. Don't know

### ASK COM9 IF COM4 = 1

**COM9.** What other comments or observations, if any, would you like to make about how you were dealt with when you contacted [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] about the issue?

**PROBE:** What else?

#### OPEN ENDED

Don't know

ASK ALL

**COM10. Now thinking more generally. Have you EVER contacted any of the following about any issues you have had with property management services you received as a leaseholder?**

MULTICODE

RANDOMISE ORDER

READ OUT

- a. ...an Ombudsman
- b. ...a First Tier Tribunal, sometimes known as a Leasehold Valuation Tribunal (LVT)
- c. ...a local councillor/MP

- 1. Yes
- 2. No
- 3. Don't know

ASK COM11 IF COM10c = 1

**COM11. Still thinking about the last time you contacted a local councillor/MP about the issue you had with [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] was the issue resolved or not?**

SINGLE CODE

- 1. Yes
- 2. No
- 3. Too early to say as the issue is ongoing
- 4. Don't know

ASK IF COM1 = 1 or COM10A, B or C = 1

**COM12. And at any point what other sources did you use to find advice or support on what to do about the issue?**

DO NOT READ OUT

MULTICODE

- 1. Other leaseholders
- 2. LEASE - leasehold advisory service
- 3. [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER']
- 4. The managing agent
- 5. Citizens Advice Bureau (CAB)
- 6. Solicitor
- 7. Family/friends
- 8. The local council
- 9. Internet search
- 10. An ombudsman
- 11. First Tier Tribunal, sometimes known as Leasehold Valuation Tribunal (LVT)
- 12. MP
- 13. Someone else (SPECIFY)
- 14. None of these
- 15. Don't know
- 16. Can't remember

ASK COM13 IF COM10a = 1



**COM13. Thinking about your experience of the Ombudsman system, did you go through the whole process or did you just contact them for advice on an issue?**

**SINGLE CODE**

1. Whole process
2. Contacted for advice
3. Don't know

**ASK COM14 IF COM13 = 1**

**COM14. Thinking about your experience of the Ombudsman system, to what extent do you agree or disagree that it...?**

**SINGLE CODE**

**RANDOMISE ORDER OF a-d**

**READ OUT**

- a. **Was costly**
- b. **Was time consuming**
- c. **Was straightforward to understand and use**
- d. **Dealt effectively with your issue**

1. Strongly agree
2. Tend to agree
3. Neither agree nor disagree
4. Tend to disagree
5. Strongly disagree
6. Don't know

**ASK COM15 IF COM13 = 1**

**COM15. And do you have any other comments about the Ombudsman system you would like to make?**

**OPEN ENDED**

Don't know

**ASK COM16 IF COM13 = 1**

**COM16. Overall, how satisfied or dissatisfied were you with the outcome?**

1. Very satisfied
2. Fairly satisfied
3. Neither satisfied nor dissatisfied
4. Fairly dissatisfied
5. Very dissatisfied
6. Too early to say as the issue has not yet been resolved or is ongoing
7. Don't know

**ASK COM17 IF COM13 = 1**

**COM17. Did the ombudsman find in your favour or not?**

**SINGLE CODE**

1. Yes, found in favour
2. No, did not find in favour
3. Not yet resolved
4. Don't know/can't remember

ASK IF COM10a = 2/3

**COM17out. Before this interview, were you aware, or not, of the Ombudsman system giving leaseholders the chance to investigate and address complaints?**

1. Yes – was aware of this
2. No – was not aware of this
3. Don't know

ASK IF COM10b = 1

**COM18. Thinking about your experience of the First Tier Tribunal, sometimes known as Leasehold Valuation Tribunal (LVT), did you go through the whole process or did you just contact them for advice on an issue?**

SINGLE CODE

1. Whole process
2. Contacted for advice
3. Don't know

ASK COM19 IF COM18 = 1

**COM19. And did you represent yourself at the tribunal or did you instruct a representative or lawyer?**

SINGLE CODE

1. Yourself
2. Representative
3. Lawyers
4. Don't know

ASK IF COM18 = 1 or 2

**COM20. And were you offered mediation by the Tribunal, or not?**

INTERVIEWER IF NECESSARY: **By mediation we mean an attempt to bring about a settlement between both parties through the intervention of a neutral party.**

1. Yes
2. No
3. Don't know

ASK COM21 IF COM20 = 1

**COM21. Did you use it, or not?**

1. Yes, used it
2. No, did not use it
3. Don't know

ASK COM22 IF COM21 = 1

**COM22. And what was the outcome of the mediation**

OPEN ENDED

Don't know

ASK COM23 IF COM18 = 1

**COM23. Still thinking about your experience of the First Tier Tribunal, sometimes known as Leasehold Valuation Tribunal (LVT), to what extent do you agree or**

**disagree that...?**

SINGLE CODE

RANDOMISE ORDER OF a-e

## READ OUT

- a. It was costly
- b. It was time consuming
- c. It was straightforward to understand and use
- d. Being represented by a lawyer was necessary
- e. It dealt effectively with the issue

1. Strongly agree
2. Tend to agree
3. Neither agree nor disagree
4. Tend to disagree
5. Strongly disagree
6. Don't know

ASK COM24 IF COM18 = 1

**COM24. And do you have any other comments about the First Tier Tribunal, sometimes known as Leasehold Valuation Tribunal (LVT) you would like to make?**

## OPEN ENDED

Don't know

ASK COM25 IF COM18 = 1

**COM25. And overall, how satisfied or dissatisfied were you with the outcome of the tribunal?**

1. Very satisfied
2. Fairly satisfied
3. Neither satisfied nor dissatisfied
4. Fairly dissatisfied
5. Very dissatisfied
6. Don't know/too early to say as the issue has not yet been resolved or is ongoing

ASK COM26 IF COM18 = 1

**COM26. Did the tribunal find in your favour or not?**

SINGLE CODE

1. Yes, found in favour
2. No, did not find in favour
3. Don't know/can't remember

ASK COM27 IF COM10b = 2/3

**COM27. Before this interview, were you aware, or not, of the First Tier Tribunal, sometimes known as Leasehold Valuation Tribunal**

1. Yes – was aware of this
2. No – was not aware of this
3. Don't know

**RESILIENCE**

ASK RES1 IF BK4 = Codes 2, 3, 4 and BK14 > 0

**READ OUT**

**RES1.** You mentioned earlier that you pay [NUMBER FROM BK14] in service charge [IF BK15 1-4 on a BK15 TEXT basis]. Compared to 2 years ago would you say it has...

SINGLE CODE

**READ OUT**

1. A lot higher
2. A little higher
3. Stayed the same
4. A little lower
5. A lot lower
6. Don't know/can't remember
7. Not applicable

ASK ALL

**READ OUT**

**RES2.** And thinking about the past 2 years have you ever been unable to pay any money that you have owed [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] or not?

MULTICODE (1/2) SINGLE CODE (3/4)

1. Yes
2. No
3. Don't know/can't remember

ASK IF RES2 = 1

**READ OUT**

**RES3.** Was this the regular service charge payment, or an extra one-off amount to pay for major works on top of what you normally pay, or both of these?

SINGLE CODE

1. Regular service charge payment
2. Extra one-off
3. Both
4. Don't know/not sure

ASK RES4 IF RES2 = 1

**READ OUT**

**RES4.** And thinking about the last occasion you had difficulties, why was that?

INTERVIEWER PROMPT: What else?

**DO NOT READ OUT**

MULTICODE

Amount

1. It was a large sum
2. Couldn't afford it

Change in circumstances

3. Loss of income due to unexpected event (redundancy, sickness etc.)
4. Unexpected expense at the time
5. Increase in mortgage payments at same time
6. Over-committed financially

Other reasons

7. Confusion over the due dates for payment
8. Some other reason (SPECIFY)
9. Nothing/none of these
10. Don't know

ASK RES5 IF RES2 = 1

RES5 Did [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER']?

MULTICODE

RANDOMISE a)-f)

READ OUT

- a) **Send a letter about non-payment**
- b) **Visit you to discuss the situation**
- c) **Ask you to pay the outstanding amount immediately**
- d) **Allow you to pay over a period of time**
- e) **Refer you to financial advice or other support services**
- f) **Make a claim against you in the County Court**

1. Yes
2. No
3. Don't know
4. Refused

**CLASSIFICATION**

READ OUT

**Thank you very much. To finish off we'll now move on to some questions about you. As with the rest of the questionnaire, I would like to assure you that your answers are completely confidential.**

ASK ALL

**DEM1. What was your age last birthday?**

SINGLE CODE

INTERVIEWER RECORD EXACT AGE AND CODE BAND IF REFUSE

1. 16-24
2. 25-34
3. 35-44
4. 45-54
5. 55-64
6. 65-74
7. 75+
8. Refuse

**DEM2. RECORD**

SINGLE CODE

1. Male

## 2. Female

**DEM3. Do you or does anyone in your household have any long-term illness, health problems or disability which limits your/ their daily activities or the work you/ they can do, including any problems which are due to old age?**

**SINGLE CODE**

1. Yes
2. No

**DEM4. What is your total household income per year from all sources before tax and other deductions? Please include any tax credits or social security benefits you receive, including housing benefit. If you're not sure, please give us a range or your best estimate.**

**SINGLE CODE**

INTERVIEWER: DO NOT READ OUT  
IF NECESSARY, PROMPT WITH RANGES

1. Up to £4,999 (up to £417 per month)
2. £5,000 - £7,499 (£418 to £624 per month)
3. £7,500 - £9,999 (£625 to £832 per month)
4. £10,000 - £14,999 (£833 to £1,249 per month)
5. £15,000 - £19,999 (£1,250 to £1,666 per month)
6. £20,000 - £29,999 (£1,667 to £2,499 per month)
7. £30,000 - £39,999 (£2,500 to £3,332 per month)
8. £40,000 - £49,999 (£3,333 to £4,166 per month)
9. £50,000 or more (£4,167 or more per month)
10. Prefer not to say

**DEM5. It is possible that Ipsos MORI, on behalf of the Competition and Markets Authority, would like to contact you again over the next twelve months to undertake further research. Can we take your details to contact you again about this study in the future?**

**SINGLE CODE**

1. Yes
2. No

COLLECT CONTACT DETAILS  
THANK AND CLOSE

## Appendix E: Topline

### CMA - PROPERTY MANAGEMENT SERVICES TOPLINE

- *Fieldwork took place between 30th April 2014 and 1st June 2014. Ipsos MORI conducted 1,050 telephone interviews with adults in England and Wales.*
- *Results are based on all respondents unless otherwise specified.*
- *Data are unweighted*
- *An asterisk (\*) indicates a figure smaller than 0.5% but greater than 0.*
- *A '-' indicates a figure of 0.*
- *Where percentages do not sum to 100, this is due to computer rounding, multiple responses or the exclusion of 'don't know' categories*

#### IF ASKED:

The interview will take 15-20 minutes depending on your answers."

- S1. We are interested in speaking to [NAME FROM SAMPLE]. Are they available please?**  
SINGLE CODE. Base: (1003)

	Yes	%
	No	92
		8

ASK IF S1=2, OTHERWISE S3

- S2. Is there someone else you think it would be appropriate for me to talk to?**  
INTERVIEWER IF NECESSARY: **The subject we are researching is the management of properties, like flats, apartments or maisonettes that share communal parts of the building, like hallways, stairs and roof.**  
SINGLE CODE. Base: (125)

	Yes	%
	No	100
		-

ASK ALL

- S3. Thinking about the main property where you live most of the time, which one, if any, of the following best describes how you occupy it. Are you...**

SINGLE CODE

IF DON'T KNOW, PROBE: **From what you know or have heard, does someone in the property pay a monthly mortgage, or do they pay rent to a landlord to live here, or perhaps they have paid off the mortgage in the past and do not have to anything to pay anyone?**

READ OUT. Base: (1050)

	%
<b>The owner of the property either outright or on a mortgage</b>	95
<b>Buying on a mortgage as a shared owner (i.e. part-rent, part-own)</b>	5
<b>Renting from a private landlord</b>	-
<b>Renting from a social landlord such as a housing association or council</b>	-
<b>Other (SPECIFY)</b>	-
<b>Don't know</b>	-

ASK IF CODE 1 or 2 at S3, OTHERWISE S7

- S4. Still thinking about the main property where you live most of the time, are you a leaseholder or are you a freeholder, or are you both?**

**A leaseholder is someone who owns a property on a long lease giving them the right to live in the property for a specified number of years on a lease, usually set at 99, 125 or 999 years to start with. The length of the lease decreases year by year until it eventually runs out. The lease sets the leaseholder's and freeholder's rights and obligations.**

**A freeholder owns the freehold of a property which includes the building, and if there are common parts of the building will include these. They might be an individual, business, housing association or a local council.**

SINGLE CODE. Base: (1050)

	%
Leaseholder	89
Freeholder	1
Leasehold with a share of the freehold	10
Don't know	*



ASK IF S4 = 1 or 3, OTHERWISE S7

**S5. Still thinking about the main property where you live most of the time, is it...**

SINGLE CODE

READ OUT. Base: (1034)

	%
<b>A flat or apartment in a block of flats/apartments</b>	78
<b>A flat within a converted house</b>	8
<b>A maisonette</b>	13
<b>A property which is separate from others and does <u>not</u> contain dwellings or flats within it – this might be a house or bungalow</b>	1
<b>Some other type of property</b>	-
Don't know	-

ASK ALL S5 = 1-3, OTHERWISE S7

**S6. Still thinking about the main property in England or Wales, do you receive property management services there – that is, do you pay a service charge or fee? This might be for maintenance or upkeep of the building and communal areas like shared stairs or hallways or for other shared services such as grass cutting or cleaning.**

SINGLE CODE. Base: (1024)

	%
Yes	100
No	*
Don't know	-

ASK ALL

**S7. Some people own a flat, apartment or maisonette which they do not live in, and rent them out to tenants, friends or family. How about you? Do you own a flat, apartment or maisonette which you do not live in and which you rent out?**

SINGLE CODE. Base: (1050)

	%
Yes	6
No	94
Don't know	*

ASK IF 1 AT S7, OTHERWISE GO TO ELIGIBILITY SUMMARY

**S8. And for how many, if any, leaseholder properties based in England or Wales do you receive property management services?**

INTERVIEWER IF NECESSARY:

**A leaseholder is someone who owns a property on a lease, typically for 99, 125 or 999 years. Property management services might include maintenance or upkeep of communal areas or other services such as shared stairs or a hallway.**

RECORD NUMBER

	%
1	50
2	23
3	13
4	2
More than 4	8

None of these	3
Don't know	-

IF S6 NOT EQUAL TO 1 AND S8 > 4 CLOSE

ELIGIBILITY SUMMARY:

S6 = 1 – own property

S8 = 1-4 – buy to let

CLOSING STATEMENT:

READ OUT

**We are looking for other types of people on this occasion and do not need to ask you any further questions. Thank you for your time.**

### **BACKGROUND**

### **READ OUT**

IF S6 = 1 AND S7 = 2/3: **For the rest of this interview, please think about the main property where you live.**

IF S6 = 1 AND S7 = 1 AND S8 = > 4: **For the rest of this interview, please think about the main property where you live.**

IF S7 = 1 AND S8 = 1 to 4: **For the rest of this interview, please think about the most recent leaseholder property you bought but do not live in.**

IF S7=1 and S8 = 0 and S6=1 **For the rest of this interview, please think about the main property where you live.**

ASK ALL

**BK1. Just so I can refer back to it, what is the name of the street this property is on?**

RECORD NAME. Base: (1012)

	%
Don't know/can't remember	21
Refused	79

ASK ALL

**BK2. And the postcode?**

RECORD POSTCODE

INTERVIEWER: COLLECT AS MUCH OF POSTCODE AS POSSIBLE

Base: (99)

	%
Don't know/can't remember	12
Refused	88

ASK ALL

- BK3. Please can you tell me who owns the freehold of the property? A freeholder may be an individual, business, housing association or a local council that owns the freehold of a property which includes the building, and if there are common parts of the building, such as a garden, will include these.**

SINGLE CODE. Base: (1050)

	%
Private individual or company	56
Housing association	12
Local council	17
Leaseholders/tenants/residents/owners/everyone	2
Management committee	*
Other	1
Don't know/na	12

READ OUT

ASK ALL

- BK4. For how long have you been a leaseholder of this property?**

RECORD EXACT NO. OF YEARS AND CODE BAND

Base: (1050)

	%
2 years or less	2
Between 3 and 5 years	1
Between 6 and 10 years	31
11 years or more	65
Don't know	1

ASK ALL

- BK5. And please could you tell me if it is in a retirement development or not?**

SINGLE CODE. Base: (1050)

	%
Yes	12
No	87
Don't know	*

ASK BK6 IF YES, code 1 at BK5

- BK6. And is specialist personal or medical care provided by the freeholder or property manager? Base: (131)**

	%
Yes	11
No	87
Don't know	2

ASK ALL

- BK7. Still thinking about [the property at [BK1 TEXT/the property we have been talking about], as far as you are aware, how many property units are there within the development (for example how many flats are there in your block)?**

INTERVIEWER IF NECESSARY: IF EXACT NUMBER NOT KNOWN ESTIMATE IS FINE

RECORD NUMBER

	%
1-5	16
6-10	24
11-20	19

20+	39
None of these	*
Don't know	2

ASK ALL

**BK8. As far as you are aware, are other residents in the development...**

SINGLE CODE

READ OUT. Base: (1050)

	%
Mainly owner-occupiers	33
Mainly renting from a private landlord	9
Mainly renting from the council or a housing association	9
None of these, it's a mixture of different groups	42
Don't know	6

ASK ALL

**BK9. Still thinking about [the property at [BK1 TEXT/the property we have been talking about], who manages and looks after the common parts of the building, like hallways, stairs and the roof in the development in which the property is based? Is it?**

SINGLE CODE.

READ OUT. Base: (1050)

	%
Property management company or managing agent	66
Housing association	1
Local council or organisation providing housing services on behalf of a council	15
Board/board of directors	*
Residents' association/residents' committee/management committee	1
Freeholder	*
Landlord	*
Our own company/residents' management company	*
Residents/tenants/owners/leaseholders/ourselves	2
RMC	*
Other	*
Don't know	3

ASK ALL

**BK10. What is the name of the [BK9TEXT/IF DK AT BK9 use 'PROPERTY MANAGER']?**

RECORD NAME. Base: (150)

	%
Don't know/can't remember	79
Refused	21

IF CODES 1/2 AT BK10, SET TO SUBSTITUTE [BK10 TEXT] WITH [BK9 TEXT]

ASK IF S8 = 1-4

**BK11.** You said earlier that you rented out the property at [BK1 TEXT]. Which of these best applies to how often you visit the property?

READ OUT. Base: 22)

		%
A	About once a week	5
B	About once a fortnight	-
C	About once a month	9
D	About once every three months	27
E	About once every six months	27
F	About once a year	14
G	Less often	9
H	Never	9
I	Don't know	-

ASK IF S8 =1-4

**BK12.** And, how often are you in touch with the tenants at [the property at [BK1 TEXT/the property we have been talking about]?

READ OUT. Base: (22)

		%
A	About once a week	9
B	About once a fortnight	5
C	About once a month	14
D	About once every three months	27
E	About once every six months	18
F	About once a year	5
G	Less often	5
H	Never	14
I	Don't know	5

ASK ALL

**BK13.** Do you pay a regular service charge for the services provided by [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER']?

SINGLE CODE. Base: (1050)

		%
	Yes	97
	No	3
	Don't know/can't remember	*

ASK IF CODE 1 AT BK13

**BK16.** Thinking about the service charge, does [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] provide the following or not? Firstly...

READ OUT

SINGLE CODE. Base: (1014)

		Yes	No	Don't know/ can't remember
		%	%	%
A	...a summary of the costs on which the charge is calculated?	86	9	5
B	...annual accounts?	84	14	3

C

...receipts and other documents which show how the monies raised have been spent?

61 34 5

ASK IF CODE 1 AT BK13

**BK17.** Does the service charge include payment into a maintenance fund or account – sometimes called a reserve or sink fund – that everyone pays into to fund major works in the future?

SINGLE CODE. Base: (1014)

	%
Yes	64
No	21
Don't know/can't remember	15

ASK ALL

**BK18.** In the last 3 years, have you had to pay extra one-off amounts to pay for major works?

SINGLE CODE. Base: (1050)

	%
Yes	31
No	67
Don't know/can't remember	2

ASK BK19 IF YES, CODE 1 AT BK18

**BK19.** On that occasion did the managing agent do the following or not. Firstly...

RANDOMISE. SINGLE CODE. Base: (330)

	Yes	No	Don't know/ can't remember
	%	%	%
A ...provide leaseholders with details of proposed major works and estimates for the work?	81	17	2
B ...provide leaseholders with the opportunity to respond to these proposals and the estimates?	72	24	5
C ...explain why the contractor was selected if they did not choose the contractor that provided the cheapest estimate?	47	33	20

IF YES, CODE 1 AT BK18

**BK20. Still thinking about that time, how satisfied or dissatisfied were you with the following...?**

READ OUT. Base: (330)

		Very satis- fied	Fairly satis- fied	Neither satis- fied nor dissatis- fied	Fairly dis- satis- fied	Very dis- satis- fied	Don't know	Can't re- member
		%	%	%	%	%	%	%
A	The works being carried out in a timely manner	19	38	9	14	16	2	1
B	The quality of the work carried out	22	34	8	15	14	7	-

## DEALINGS WITH PROPERTY MANAGERS

ASK ALL

**PM1. Thinking again about [the property at [BK1 TEXT/the property we have been talking about], I am going to read out a list of things that [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] may or may not be responsible for. Please tell me if they are responsible for...**

SINGLE CODE. RANDOMISE ORDER OF a)-g)

READ OUT. Base: (1050)

		Yes	No	Don't know/ can't remember	Not applicable
		%	%	%	%
A	Upkeep of outside areas such as gardens or grounds e.g. grass cutting	83	14	1	2
B	Maintenance and repairs of internal common areas e.g. hall, stairs, lifts	76	16	1	7
C	Cleaning of internal common areas e.g. hall, stairs, lifts	70	21	1	8
D	Maintenance and repairs to external common areas e.g. roof, gutters, outside walls and windows	91	7	2	*
E	Provision of porter, warden or concierge services	19	55	2	24
F	Collection of service charges and preparation of accounts	86	7	6	*
G	Organising buildings insurance	88	8	4	*

ASK PM2a-g IF PM1a-g = 1

**PM2. In general how would you rate the standard of these services provided by**  
[BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] ...?  
SINGLE CODE. RANDOMISE ORDER. READ OUT.

**Would you rate them as... READ OUT.**

		Very good	Fairly good	Neither good nor poor	Fairly poor	Very poor	Don't know	Not applic- able
	Base	%	%	%	%	%	%	%
A	<b>Upkeep of outside areas such as gardens or grounds e.g. grass cutting</b>	(872)	43	32	9	8	6	1
B	<b>Maintenance and repairs of internal common areas e.g. hall, stairs, lifts</b>	(797)	36	36	11	8	6	2
C	<b>Cleaning of internal common areas e.g. hall, stairs, lifts</b>	(736)	44	33	7	7	5	1
D	<b>Maintenance and repairs to external common areas e.g. roof, gutters, outside walls and windows</b>	(955)	32	34	10	11	8	3
E	<b>Provision of porter, warden or concierge services</b>	(198)	50	26	7	6	2	3
F	<b>Collection of service charges and preparation of accounts</b>	(907)	41	36	9	5	4	4
G	<b>Level of buildings insurance</b>	(921)	27	31	8	4	3	25

ASK ALL

**PM3. Now thinking about repairs and maintenance, how would you rate** [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] **in terms of the following ...?**  
SINGLE CODE. RANDOMISE ORDER. READ OUT

**Would you say they are... READ OUT. Base: (1050)**

		Very good	Fairly good	Neither good nor poor	Fairly poor	Very poor	Don't know	Not applic- able
		%	%	%	%	%	%	%
A	<b>Acting promptly when repairs or maintenance are required</b>	28	30	9	11	12	4	5
B	<b>Consulting leaseholders for their views on major work</b>	29	26	8	9	12	5	10
C	<b>Consulting leaseholders for their views on which contractors to use</b>	25	23	8	12	14	9	9
D	<b>Providing information on what the service charge has been spent on</b>	38	34	6	7	8	3	3
E	<b>Providing information about planned major works</b>	32	31	7	8	8	5	10



ASK ALL

- PM4. Taking everything into account, would you say that the overall service provided by [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] is...?**  
SINGLE CODE. Base: (1050)

	%
Very good	30
Fairly good	34
Neither good nor poor	14
Fairly poor	11
Very poor	9
Don't know	1
Not applicable	1

ASK ALL

- PM5. To what extent, if at all, do you agree or disagree that [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] provides value for money?**  
SINGLE CODE. Base: (1050)

	%
Strongly agree	23
Tend to agree	30
Neither agree nor disagree	15
Tend to disagree	14
Strongly disagree	14
Don't know	5

ASK IF PM5 = 4/5

**PM6. Why do you say that?**

PROBE: **What else?**

MULTICODE. Base: (290)

	%
Cost of management services is too high	43
Cost of repairs and maintenance are too high	20
When repairs are needed, the managing agent does not make much effort to get good value for money on behalf of the residents	16
Service charge accounts are not sufficiently detailed	13
Cost of management services keeps rising	11
Service charge invoices are not accurate	6
Parking charges/lack of parking	2
Cost of buildings insurance / insurance charges too high	1
Bills/charges are divided unfairly/additional fees	1
Repairs and maintenance are not carried out when required	32
Services (unspecified) are poor	30
Repair and maintenance are performed to a low standard	22
Repairs and maintenance are carried out unnecessarily	6
They don't care/they aren't willing to help/we get no help	2
Residents are not kept informed about what is going on	28
I never hear from them	14
Poor Communication	4
Other	6
Don't know	2

ASK PM7a-e IF PM1a-e = 1

**PM7. Can I check, from what you know or have heard, does [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] ever use contractors to undertake the following – that is, do they pay a company to do these things?**

MULTICODE

RANDOMISE ORDER. READ OUT. Base: (1035)

		%
A	Upkeep of outside areas such as gardens or grounds e.g. grass cutting	66
B	Maintenance and repairs of internal common areas e.g. hall, stairs, lifts	60
C	Cleaning of internal common areas e.g. hall, stairs, lifts	51
D	Maintenance and repairs to external common areas e.g. roof, gutters, outside walls and windows	76
E	Provision of porter, warden or concierge services	8
F	None of these	8
	Don't know	6

ASK PM8 IF CODES 1-5 AT PM7

**PM8. Overall, would you say that the quality of contractors is...**

SINGLE CODE

READ OUT. Base: (890)

	%
Very good	27
Fairly good	42
Neither good nor poor	15
Fairly poor	8
Very poor	5
Don't know	2
Not applicable	*

ASK ALL

**PM9. And can I just check, do leaseholders at [the property at [BK1 TEXT/the property we have been talking about] come together to discuss any issues and concerns about the management of their properties, perhaps at a regular meeting or through a residents committee?**

SINGLECODE. Base: (1050)

	%
Yes	54
No	43
Don't know	3

## SWITCHING

READ OUT

**Now on a different subject...**

ASK IF BK3=1 [PRIVATE]

- SW1. Right to Manage allows leaseholders with communal facilities to take control of the management of the buildings where they live. It gives them the right to appoint their own managing agent. Before this interview, were you aware of this or not?**

SINGLE CODE. Base: (577)

	%
Yes, was aware	54
No, was not aware	44
Don't know	2

ASK SW2 IF BK3 = 1

- SW2. And from what you know or have heard, have leaseholders at [the property at [BK1 TEXT/the property we have been talking about] done or tried to do this, or not?**

SINGLE CODE. Base: (577)

	%
Yes, have tried	25
No, have not tried	60
Don't know	14

ASK IF CODE 1 AT SW2

- SW3. And were they successful or not?**

SINGLE CODE. Base: (147)

	%
Yes, successful	71
No, not successful	20
Don't know	9

ASK SW4 IF CODE 1 AT SW3

- SW4. As far as you know, WHEN did this happen?**

SINGLE CODE. Base: (105)

	%
Within past 2 years	15
Between 3 and 5 years	22
Between 6 and 10 years	27
11 years or more	30
Don't know	6

## RMC/RTMC

ASK SW5 IF BK3 = 1 or 2 and SW3 ≠ 1

- SW5. Sometimes leaseholders manage the property through a 'Residents Management Company (RMC)'. From what you know is there a 'Residents Management Company (RMC)' at [the property at [BK1 TEXT/the property we have been talking about], or not?**

SINGLE CODE. Base: (596)

	%
Yes	11
No	78
Don't know	11

ASK SW6 IF SW5 = 1

**SW6. And, as far as you know, when was this setup, or has the property always been managed by a 'Residents Management Company (RMC)'?**

SINGLE CODE. Base: (84)

	%
Within past 2 years	8
Between 3 and 5 years	3
Between 6 and 10 years	9
Between 10 and 20 years	17
21 years or more	8
Always been managed by Residents Management Company	41
Don't know	15

ASK SW8 IF SW2 = 1 OR SW5=1

**SW8. And from what you know or have heard, was the process of leaseholders taking control or trying to take control of the management of the buildings where they live easy or difficult? Was it...**

SINGLE CODE. READ OUT. Base: (142)

	%
Very easy	9
Fairly easy	22
Fairly difficult	12
Very difficult	13
Don't know/can't remember	45

ASK SW10 IF SW3 = 1 OR SW5 =1

**SW10. Would you say that since this happened, management of the properties and the communal areas has got better, got worse or has it stayed the same?**

Base: (66)

	%
Got much better	23
Got a little better	9
Stayed the same	39
Got a little worse	-
Got much worse	2
Don't know/not sure	27

ASK SW11 IF SW3 = 1 OR SW5=1

**SW11. And since this happened, has the level of service charges for the properties and the communal areas increased, decreased or stayed the same?**

Base: (107)

	%
Increased	47
Decreased	8
Stayed the same	27
Don't know/not sure	18

**TMO**

ASK IF BK3 = 3

- SW12.** Sometimes leaseholders of local council properties manage the property through a Tenant Management Organisation (TMO). From what you know is there a Tenant Management Organisation at [the property at [BK1 TEXT/the property we have been talking about], or not? SINGLE CODE. Base: (176)

	%
Yes	10
No	74
Don't know	16

ASK SW13 IF SW12 = 1

- SW13.** Thinking again about [the property at [BK1 TEXT/the property we have been talking about], Which of these, if any, is the Tenant Management Organisation responsible for. Please tell me if they are responsible for...

MULTICODE

RANDOMISE ORDER OF a-g. READ OUT. Base: (17)

	%
Upkeep of outside areas such as gardens or grounds e.g. grass cutting	35
Maintenance and repairs of internal common areas e.g. hall, stairs, lifts	29
Cleaning of internal common areas e.g. hall, stairs, lifts	29
Maintenance and repairs to external common areas e.g. roof, gutters, outside walls and windows	35
Provision of porter, warden or concierge services	6
Collection of service charges and preparation of accounts	29
Organising buildings insurance	35
Don't know	18
None of these	47

ASK SW14 IF SW12 = 1

- SW14.** And, as far as you know, when was the Tenant Management Organisation (TMO) set up, or has the property always been managed by a Tenant Management Organisation? To clarify, sometimes leaseholders of local council properties manage the property through a Tenant Management Organisation.

SINGLE CODE. Base: (17)

	%
Within past 2 years	6
Between 3 and 5 years	-
Between 6 and 10 years	-
Between 10 and 20 years	12
21 years or more	6
Always been managed by TMO	35
Don't know	41

ASK IF SW12 = 1

()

**SW15.** You said that there is a Tenant Management Organisation at [the property at [BK1 TEXT/the property we have been talking about]. From what you know or have heard, what was the reason for this being setup?

PROBE FULLY AND WRITE IN. INTERVIEWER IF NECESSARY:

ANY ANSWER (WRITE IN AND CODE '1)

1

None/no answer

X

Don't know

Y

(-)

ASK IF SW14 = 1-5

**SW16.** And from what you know or have heard, was the process of setting up a Tenant Management Organisation easy or difficult? Was it...

SINGLE CODE. READ OUT. Base: (4)

	%
Very easy	-
Fairly easy	25
Fairly difficult	-
Very difficult	-
Don't know/can't remember	75
Not applicable	-

ASK SW18 IF SW12 = 1 AND SW14 = 1-5

**SW18.** Would you say that since this happened, management of the properties and the communal areas has got better, got worse or has it stayed the same?

Base: (4)

	%
Got much better	-
Got a little better	-
Stayed the same	25
Got a little worse	-
Got much worse	25
Don't know/not sure	25
Not applicable	25

ASK SW19 IF SW12 = 1 AND SW14 = 1-5

**SW19.** And since this happened, has the level of service charges for the properties and the communal areas increased, decreased or stayed the same?

Base: (4)

	%
Increased	50
Decreased	-
Stayed the same	50
Don't know/not sure	-

## REDRESS/MAKING COMPLAINTS

READ OUT

Now on a different subject...

ASK ALL

- COM1.** Still thinking about [the property at [BK1 TEXT/the property we have been talking about], have you ever had any reasons to be dissatisfied with [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER']?  
SINGLE CODE. Base: (1050)

	%
Yes	42
No	56
Don't know/can't remember	2

ASK IF COM1 = 1

- COM2.** Thinking about the last time you had a reason to be dissatisfied with [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'], which of these, if any, was that reason about? SINGLE CODE. READ OUT. RANDOMISE  
Base: (444)

	%
Maintenance and repairs to external common areas e.g. roof, gutters, outside walls and windows	37
Upkeep of outside areas such as gardens or grounds e.g. grass cutting etc.	15
Maintenance and repairs of internal common areas e.g. hall, stairs, lifts	14
Cleaning of internal common areas e.g. hall, stairs, lifts	6
Cost/price/is expensive/no value for money	5
Poor service	5
Lack of/poor communication/hard to get hold of/don't return calls/ emails	3
Accounting and billing system/ getting accounts wrong/sending bills when no work has been done/ sending to wrong person/not on time/clearly presented	3
Noise/anti social behaviour	2
All of the above/all four options	1
Car parking/allocations/ restrictions	1
Contractual matters	1
(Work on) adjacent property negatively affected my property	1
Issues with building insurance/ insurance documents	1
Leasehold extension/is expensive	1
Poor management of finances/ reserve fund	1
Other	4
Don't know/can't remember	1



ASK IF COM1 = 1

**COM3. And what specifically was the issue about?**

Base: (444)

	%
Repairs and maintenance are not carried out when required	32
Repairs and maintenance are performed to a low standard	25
Services (unspecified) are poor	21
Important services are not provided	12
Repairs and maintenance are carried out unnecessarily	5
Communication	24
Residents are not kept informed about what is going on	13
Quality of information is poor	11
I never hear from them	9
Cost of management services is too high	9
Cost of repairs and maintenance are too high	8
When repairs are needed, the managing agent does not make much effort to get good value for money on behalf of the residents	6
Service charge accounts are not sufficiently detailed	4
Cost of management services keeps rising	3
Service charge invoices are not accurate	2
The managing agent does not do enough to get good deals on services like cleaning	2
The cost of insurance is excessive	1
Other issues	11
Problem with flooding/drainage/ leakage	2
Contractual matter	2
Anti social behaviour/noise	2
Parking issues	1
Health and safety issues	1
Problems with contractors/sub contractors	1
A matter of the law/didn't know the law/comply with the law	1
A problem with neighbouring property/damage to next door	1
Application for a leasehold extension/too expensive	*
Replaced my door with the wrong one/one I did not want	*
Key replacement for post box/ door	*
Other	4
Don't know	2

ASK IF COM1 = 1

**COM4. And did you contact [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] about the issue yourself, did someone else such as another leaseholder or a residents group contact them, or did no-one contact them?**

SINGLE CODE. Base: (444)

	%
Respondent contacted	77
Someone else contacted.	16
No-one contacted them	5
Don't know	2

ASK COM5 IF COM4 = 1

**COM5. For which of these reasons, if any, did you contact them?**

READ OUT. MULTICODE. Base: (344)

	%
To find out what was happening	56
To obtain information	50
To express my dissatisfaction	65
To make a complaint	59
To find out where I could get advice or support	19
Something else (SPECIFY)	5
None of these	-
Don't know/can't remember	-

ASK COM6 IF COM1 = 1 and COM4 = 2/3

**COM6. Thinking about the last time you were dissatisfied but did not personally contact [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'], what prevented you from doing so?**

MULTICODE, DO NOT READ OUT. Base: (92)

	%
Someone else in the properties/block contacted them	39
The problem was resolved before I got the chance	1
I didn't know how to go about contacting them	1
The process of contacting them was too difficult	4
I didn't have time	4
I just didn't get around to it	7
I didn't think it would be worthwhile as nothing would be done	11
I didn't think it was serious enough	2
Other (SPECIFY)	39
Don't know/can't remember	5

**COM7.** ASK IF COM4 = 1  
**Still thinking about the last time you contacted [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] how satisfied or dissatisfied were you with the following...?**

SINGLE CODE

RANDOMISE ORDER

READ OUT. Base: (344)

		Very satisfied	Fairly satisfied	Neither satisfied nor dissatisfied	Fairly dissatisfied	Very dissatisfi ed	Too early to say as the issues has not yet been resolved or is ongoing	DK
		%	%	%	%	%	%	%
A	[BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] <b>being clear about how they would deal with you</b>	8	18	9	19	36	7	3
B	<b>The time it took to deal with what you contacted them about</b>	7	17	8	18	38	10	2
C	<b>The ease of getting through to speak to the right person</b>	15	29	12	15	25	2	3

ASK COM7out IF COM4 = 1

**COM7 out** And how satisfied or dissatisfied were you with the outcome, or has there not yet been an outcome?

SINGLE CODE

READ OUT. Base: (344)

	%
Very satisfied	8
Fairly satisfied	17
Neither satisfied nor dissatisfied	4
Fairly dissatisfied	10
Very dissatisfied	16
There has not yet been an outcome	45
Don't know	1

ASK COM8 IF COM7out = 1-5

**COM8.** **Taking everything into account, and regardless of the outcome, how satisfied or dissatisfied were you with the way in which your issue was handled by [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER']?**

SINGLE CODE. READ OUT. Base: (186)

	%
Very satisfied	9
Fairly satisfied	25
Neither satisfied nor dissatisfied	12
Fairly dissatisfied	19
Very dissatisfied	33
Too early to say as the issues has not yet been resolved or is ongoing	2
Don't know	-

**COM8. out** ASK COM8out IF COM7out = 6  
**Taking everything into account how satisfied or dissatisfied are you with the way in which your issue has been handled by [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] up to this point?**  
 SINGLE CODE. READ OUT. Base: (156)

	%
Very satisfied	1
Fairly satisfied	10
Neither satisfied nor dissatisfied	2
Fairly dissatisfied	19
Very dissatisfied	54
Too early to say as the issues has not yet been resolved or is ongoing	12
Don't know	1

**COM10.** ASK ALL  
**Now thinking more generally. Have you EVER contacted any of the following about any issues you have had with property management services you received as a leaseholder?**

MULTICODE. RANDOMISE ORDER  
 READ OUT. Base: (1050)

		Yes	No	Don't know/ can't remember
		%	%	%
A	...an Ombudsman	2	97	1
B	...a First Tier Tribunal, sometimes known as a Leasehold Valuation Tribunal (LVT)	3	96	1
C	...a local councillor/MP	7	92	*

ASK COM11 IF COM10c = 1

**COM11.** **Still thinking about the last time you contacted a local councillor/MP about the issue you had with [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] was the issue resolved or not?**  
 SINGLE CODE. Base: (78)

	%
Yes	42
No	40
Too early to say as the issue is ongoing/Don't know	18

ASK IF COM1 = 1 or COM10A, B or C = 1

**COM12. And at any point what other sources did you use to find advice or support on what to do about the issue?**

DO NOT READ OUT. MULTICODE. Base: (472)

	%
The (HA/LA/property manager)	12
Other leaseholders	11
Solicitor	9
Internet search	8
Citizens Advice Bureau (CAB)	5
Family/friends	5
The local council	5
LEASE - leasehold advisory service	4
The managing agent	3
First Tier Tribunal, sometimes known as Leasehold Valuation Tribunal (LVT)	2
Resident/leaseholder association	2
MP	2
Freeholder/landowner/agent	1
Contractor/tradesperson	1
An ombudsman	1
Age Concern/Age UK	1
Industry body (e.g. ACAS, ARMA)	1
Local Councillor	*
Other	3
None of these	45
Don't know	1
Can't remember	*

ASK COM13 IF COM10a = 1

**COM13.**

**Thinking about your experience of the Ombudsman system, did you go through the whole process or did you just contact them for advice on an issue?**

SINGLE CODE. Base: (22)

	%
Whole process	18
Contacted for advice	73
Don't know	9

ASK COM14 IF COM13 = 1

**COM14. Thinking about your experience of the Ombudsman system, to what extent do you agree or disagree that it...?**

SINGLE CODE

RANDOMISE ORDER OF a-d

READ OUT. Base: (4)

		Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	Don't know
		%	%	%	%	%	%
A	<b>Was costly</b>	50	-	25	-	25	-
B	<b>Was time consuming</b>	50	25	-	-	-	25
C	<b>Was straightforward to understand and use</b>	50	-	25	-	-	25

D	<b>Dealt effectively with your issue</b>	50	-	25	-	-	25
---	--	----	---	----	---	---	----

ASK COM16 IF COM13 = 1

**COM16. Overall, how satisfied or dissatisfied were you with the outcome?**

Base: (4)

	%
Very satisfied	50
Fairly satisfied	-
Neither satisfied nor dissatisfied	25
Fairly dissatisfied	-
Very dissatisfied	-
Too early to say as the issues has not yet been resolved or is ongoing	25
Don't know	-

ASK COM17 IF COM13 = 1

**COM17. Did the ombudsman find in your favour or not?**

SINGLE CODE. Base: (4)

	%
Yes, found in favour	50
No, did not find in favour	-
Not yet resolved	-
Don't know/can't remember	50

ASK IF COM10a = 2/3

**COM17. Before this interview, were you aware, or not, of the Ombudsman system giving leaseholders the chance to investigate and address complaints?**

out

Base: (1028)

	%
Yes – was aware of this	44
No – was not aware of this	55
Don't know	1

ASK IF COM10b = 1

**COM18. Thinking about your experience of the First Tier Tribunal, sometimes known as Leasehold Valuation Tribunal (LVT), did you go through the whole process or did you just contact them for advice on an issue?**

SINGLE CODE. Base: (33)

	%
Whole process	52
Contacted for advice	42
Don't know	6

ASK COM19 IF COM18 = 1

**COM19. And did you represent yourself at the tribunal or did you instruct a representative or lawyer?**

SINGLE CODE. Base: (17)

	%
Yourself	59
Representative	35

Lawyers	6
Don't know	-

ASK IF COM18 = 1 or 2

- COM20. And were you offered mediation by the Tribunal, or not?**  
 INTERVIEWER IF NECESSARY: **By mediation we mean an attempt to bring about a settlement between both parties through the intervention of a neutral party.**  
 Base: (31)

	%
Yes	16
No	77
Don't know	6

ASK COM21 IF COM20 = 1

- COM21. Did you use it, or not?** Base: (5)

	%
Yes, used it	20
No, did not use it	80
Don't know	-

ASK COM23 IF COM18 = 1

- COM23. Still thinking about your experience of the First Tier Tribunal, sometimes known as Leasehold Valuation Tribunal (LVT), to what extent do you agree or disagree that...?**  
 SINGLE CODE. RANDOMISE ORDER OF a-e. READ OUT. Base: (17)

		Strongly agree	Tend to agree	Neither agree nor disagreed	Tend to disagree	Strongly disagree	Don't know
		%	%	%	%	%	%
A	It was costly	24	12	12	29	24	-
B	It was time consuming	47	29	12	12	-	-
C	It was straightforward to understand and use	18	29	12	12	29	-
D	Being represented by a lawyer was necessary	53	12	18	12	6	-
	It dealt effectively with the issue	41	18	6	-	35	-

()

ASK COM24 IF COM18 = 1

- COM24. And do you have any other comments about the First Tier Tribunal, sometimes known as Leasehold Valuation Tribunal (LVT) you would like to make?**  
 PROBE FULLY AND WRITE IN.

ANY ANSWER (WRITE IN AND CODE '1)

1

None/no answer

X

Don't know

Y

(-)

ASK COM25 IF COM18 = 1

- COM25. And overall, how satisfied or dissatisfied were you with the outcome of the tribunal?**  
 Base: (17)

	%
Very satisfied	18

Fairly satisfied	35
Neither satisfied nor dissatisfied	6
Fairly dissatisfied	0
Very dissatisfied	41
Don't know/too early to say as the issue has not yet been resolved or is ongoing	-

ASK COM26 IF COM18 = 1

**COM26. Did the tribunal find in your favour or not?**  
SINGLE CODE. Base: (17)

	%
Yes, found in favour	59
No, did not find in favour	29
Don't know/can't remember	12

ASK COM27 IF COM10b = 2/3

**COM27. Before this interview, were you aware, or not, of the First Tier Tribunal, sometimes known as Leasehold Valuation Tribunal.** Base: (1017)

	%
Yes – was aware of this	21
No – was not aware of this	78
Don't know	1

## **RESILIENCE**

ASK RES1 IF BK4 = Codes 2, 3, 4 and BK14 > 0

### **READ OUT**

**RES1. You mentioned earlier that you pay [NUMBER FROM BK14] in service charge [IF BK15 1-4 on a BK15 TEXT basis]. Compared to 2 years ago would you say it has...**  
SINGLE CODE. READ OUT. Base: (674)

	%
Increased a lot	18
Increased a little	48
Stayed the same	26
Decreased a little	3
Decreased a lot	2
Don't know/can't remember	3
Not applicable	1

ASK ALL

### **READ OUT**

**RES2. And thinking about the past 2 years have you ever been unable to pay any money that you have owed [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER'] or not?**  
MULTICODE (1/2) SINGLE CODE (3/4). Base: (1050)

	%
Yes	6
No	94
Don't know/can't remember	*



ASK IF RES2 = 1

READ OUT

**RES3. Was this the regular service charge payment, or an extra one-off amount to pay for major works on top of what you normally pay, or both of these?**  
SINGLE CODE. Base: (59)

	%
Regular service charge payment	46
Extra one-off	32
Both	20
Don't know/not sure	2

ASK RES4 IF RES2 = 1

READ OUT

**RES4. And thinking about the last occasion you had difficulties, why was that?**  
INTERVIEWER PROMPT: **What else?**  
**DO NOT READ OUT**  
MULTICODE. Base: (59)

<u>Amount</u>	%
It was a large sum	22
Couldn't afford it	32
<u>Change in circumstances</u>	
Loss of income due to unexpected event (redundancy, sickness etc.)	19
Unexpected expense at the time	5
Increase in mortgage payments at same time	-
Over-committed financially	7
<u>Other reasons</u>	
Confusion over the due dates for payment	5
Some other reason (SPECIFY)	24
Nothing/none of these	2
Don't know	2

ASK RES5 IF RES2 = 1

**RES5 Did [BK10TEXT/IF DK AT BK10 use 'THE PROPERTY MANAGER']?**

MULTICODE

RANDOMISE a)-f). READ OUT. Base: (59)

		Yes	No	Don't know	Refused
		( )	( )	( )	( )
		%	%	%	%
A	<b>Send a letter about non-payment</b>	71	27	2	-
B	<b>Visit you to discuss the situation</b>	12	88	-	-

C	Ask you to pay the outstanding amount immediately	53	44	3	-
D	Allow you to pay over a period of time	78	20	2	-
E	Refer you to financial advice or other support services	8	88	3	-
F	Make a claim against you in the County Court	19	81	-	-

## **CLASSIFICATION**

READ OUT

Thank you very much. To finish off we'll now move on to some questions about you. As with the rest of the questionnaire, I would like to assure you that your answers are completely confidential.

ASK ALL

### **DEM1. What was your age last birthday?**

SINGLE CODE

INTERVIEWER RECORD EXACT AGE AND CODE BAND IF REFUSE

Base: (1050)

	%
16-24	-
25-34	5
35-44	14
45-54	17
55-64	16
65-74	22
75+	24
Refuse	2

### **DEM2. RECORD**

SINGLE CODE. Base: (1050)

	%
Male	42
Female	58

### **DEM3. Do you or does anyone in your household have any long-term illness, health problems or disability which limits your/ their daily activities or the work you/ they can do, including any problems which are due to old age?**

SINGLE CODE. Base: (1050)

	%
Yes	23
No	77

**DEM4. What is your total household income per year from all sources before tax and other deductions? Please include any tax credits or social security benefits you receive, including housing benefit. If you're not sure, please give us a range or your best estimate.**

SINGLE CODE

INTERVIEWER: DO NOT READ OUT

IF NECESSARY, PROMPT WITH RANGES. Base: (1050)

	%
Up to £4,999 (up to £417 per month)	2
£5,000 - £7,499 (£418 to £624 per month)	4
£7,500 - £9,999 (£625 to £832 per month)	4
£10,000 - £14,999 (£833 to £1,249 per month)	10
£15,000 - £19,999 (£1,250 to £1,666 per month)	6
£20,000 - £29,999 (£1,667 to £2,499 per month)	12
£30,000 - £39,999 (£2,500 to £3,332 per month)	7
£40,000 - £49,999 (£3,333 to £4,166 per month)	5
£50,000 or more (£4,167 or more per month)	11
Prefer not to say	38

**DEM5. It is possible that Ipsos MORI, on behalf of the Competition and Markets Authority, would like to contact you again over the next twelve months to undertake further research. Can we take your details to contact you again about this study in the future?**

SINGLE CODE. Base: (1050)

	%
Yes	74
No	26

COLLECT CONTACT DETAILS  
THANK AND CLOSE

## Appendix F: Cognitive testing recruitment questionnaire

14-018828-01 CMA Leaseholder Survey  
Cognitive testing stage

### Recruitment questionnaire 10/04/2014

Good morning/afternoon/evening, My name is . . . . . from Ipsos MORI, the independent market research company.

We are inviting people to take part in an interview about their home ownership to test a questionnaire we are designing. The interview would be conducted by a researcher at Ipsos MORI and would take around an hour. As part of this you will be taken through the questionnaire and asked about the subject matter, key terms and phrases, and specific questions to understand how you react to them and if the questionnaire is clear.

This would take place in the Ipsos MORI office on Borough Road on 15<sup>th</sup> or 16<sup>th</sup> April. The interview would take place on a weekday at a time that was convenient to you between 10am and 5pm. To say thank you for your time and cover any expenses incurred we would like to offer £30.

**THE INCENTIVE OFFERED REPRESENTS COMPENSATION FOR THEIR TIME, TRAVEL EXPENSES AND ANY CHILDCARE.**

The interview is confidential and no one who takes part in the research will be identified in any findings. Our client may also want to observe some of the interviews but they will not be directly involved.

I wonder if you could help me.

We are looking for particular groups of people; therefore I would like to ask you some questions about yourself.

### INTEREST IN / SUITABILITY TO TAKE PART

ASK ALL

**S1** Would you be interested in taking part?

SINGLE CODE

- 7. Yes – GO TO S2
- 8. No – CLOSE

ASK ALL

**S2** Have you participated in any kind of research (i.e. an interview or a focus group) for a market research company in the last 12 months?

SINGLE CODE

- 1. Yes – CLOSE
- 2. No – GO TO S3

## ASK ALL

**S3** Thinking about the main property where you live most of the time, which one, if any, of the following best describes how you occupy it. Are you...

## SINGLE CODE

1. The owner of the property either outright or on a mortgage – GO TO S4
2. Buying on a mortgage as a shared owner (i.e. part rent-part own) – GO TO S9
3. Renting from a private landlord – GO TO S9
4. Renting from a social landlord such as a housing association or council – GO TO S9
5. Other – GO TO S9
6. Don't know – CLOSE

## ASK ALL

**S4** Still thinking about the main property where you live most of the time, are you personally a leaseholder – that is, you own the property outright or pay on a mortgage on it but have a lease for the land it is built on – or are you a freeholder, owning the land as well as the property?

## SINGLE CODE

5. Leaseholder – GO TO S5
6. Freeholder – GO TO S9
7. Both – GO TO S9
8. Don't know – CLOSE

## ASK IF S4=1

**S5** Do you live in...

## SINGLE CODE

7. **A flat, apartment or maisonette (either in a block or contained within a house) – GO TO S6**
8. **A house which does not contain separate dwellings or flats – GO TO S9**
9. **Some other type of property – GO TO S9**
10. Don't know – CLOSE

## ASK ALL S5=1

**S6** Is this in a retirement development (i.e. properties where there is a minimum age condition (e.g. 55+), include housing without support and housing with support)?

## MULTICODE

1. Yes (**QUOTA D**) – GO TO S7
2. No – GO TO S7
3. Don't know – CLOSE

## ASK IF

**S7** And is the freeholder (the owner of the overall building development) a...?

## SINGLE CODE

6. Private individual or company – GO TO S8
7. Local council or housing association – GO TO S8
8. The leaseholders through a Residents' Management Company which has bought the freehold – GO TO S16 (**QUOTA C**)
9. Someone else (SPECIFY) – CLOSE
10. Don't know – CLOSE

## ASK ALL S4=1

**S8** Thinking again about the main property, do you receive residential property management services – that is, you pay a service charge or fee for

maintenance and upkeep of communal areas or other services? For example, this could include upkeep of a shared stairwell or hallway.

#### SINGLE CODE

5. Yes – GO TO S9
6. No – CLOSE
7. Don't know – CLOSE

#### ESTABLISHING QUOTAS / ELIGIBILITY PART 2 (IF BUY TO LET LEASEHOLDER OF FLAT ETC IN E&W AND IN RECEIPT OF RPMSSs)

**S9** We are also interested in interviewing people who own the leasehold to a flat, apartment or maisonette in England and Wales and rent it out to someone else.

Do you own the leasehold to a flat, apartment or maisonette but rent it out to someone else?

INTERVIEWER IF NECESSARY: By owning, we mean paying on a mortgage or owned outright.

#### SINGLE CODE

4. Yes – GO TO S11
5. No – CLOSE
6. Don't know – CLOSE

ASK ALL S9=1

**S10** How many properties do you own which you do not live in?

RECORD NUMBER – IF 1+ GO TO S12

1. Don't know – CLOSE

ASK IF 1+ AT S10

**S11** And how many of these, if any, are leaseholder properties?

INTERVIEWER IF NECESSARY: By leaseholder, we mean owning the property but not the land it is built on/the building overall

RECORD NUMBER – IF 1+ GO TO S13

2. None of these – CLOSE
3. Don't know – CLOSE

ASK IF 1+ AT S11

**S12** How many of these based in England or Wales?

SINGLE CODE

RECORD NUMBER – IF 1+ GO TO S14

1. None of these – CLOSE
2. Don't know – CLOSE

ASK IF 1+ AT S10

**S13** Please think about your leaseholder properties based in England or Wales. Do you receive residential property management services for any of them – that is, you pay a service charge or fee for maintenance, upkeep of communal areas or other services?

1. Yes – GO TO S14
2. None of these – CLOSE

## 3. Don't know – CLOSE

**S14** Who repairs and looks after the common parts in the development in which the property is based?

## SINGLE CODE

1. Private individual or company – GO TO S16 (QUOTA B)
2. Local council or housing association – GO TO S16 (QUOTA B)
3. The leaseholders through a Residents' Management Company which has bought the freehold – GO TO S16 (QUOTA B)
4. **Someone else** (SPECIFY) – CLOSE
5. Don't know – CLOSE

### ESTABLISHING QUOTAS / ELIGIBILITY PART 3 (IF A COMPLAINANT AND EDUCATIONAL ATTAINMENT)

**S15** Have you ever made a complaint about the services provided for your leaseholder property?

## SINGLE CODE

4. Yes – GO TO S17 (QUOTA G)
5. No – GO TO S17 (QUOTA H)
6. Don't know/can't remember – GO TO S17 (QUOTA H)

**S16** Please tell me which, if any, is the highest educational or professional qualification you have obtained.

(IF STILL STUDYING, CHECK FOR HIGHEST ACHIEVED SO FAR) (READ OUT)

## SINGLE CODE ONLY

1. GCSE / O-level / CSE (QUOTA J)
2. Vocational qualifications (=NVQ1+2) (QUOTA J)
3. A-Level or equivalent (=NVQ3) (QUOTA J)
4. Bachelor Degree or equivalent (=NVQ4) (QUOTA I)
5. Masters / PhD or equivalent (QUOTA I)
6. No formal qualifications (QUOTA J)
7. Don't know

If the respondent asks you for more information or about the legitimacy of the research you can refer them to Danny Slater, Research Executive at Ipsos MORI, on 020 7347 3940.

Interviewer number:

Interviewer name (CAPS):

I confirm that I have conducted this interview face to face with the above person and that I asked all the relevant questions and recorded the answers in conformance with the survey specifications and with the MRS Code of Conduct and the Data Protection Act 1998.

Interviewer Signature:

Date:

CMA Leaseholder Survey

RESPONDENT NO:

PERSONAL IDENTIFIERS

Location:

Date:

Time:

Name/Initial/Title: Mr/Mrs/Ms/Miss

Address:

PLEASE TRY TO COLLECT BOTH MOBILE & LANDLINE TELEPHONE  
NUMBERS IF POSSIBLE.

Tel. Number (WRITE IN INCL. STD code)

Home 1

Mobile 2

Work 3

Refused/Ex-directory 4

e-mail address (WRITE IN)

Is respondent willing to take part and available?

Yes 1

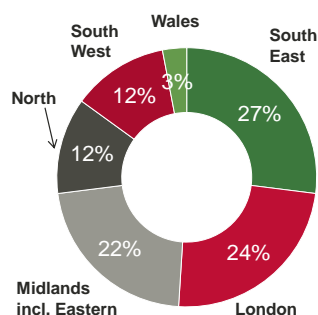
No 2



## Appendix G: Tables for section 2: sample profile

### Interviews achieved by region

#### REGION



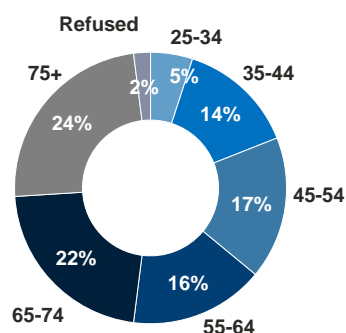
%	Private properties (586) (column %)	LAs (178) (column %)	HAs (124) (column %)	Retirement (131) (column %)	RTMC/RMC (171) (column %)	Non-RTMC/RMC (456) (column %)
London	21%	37%	25%	7%	15%	24%
South East	29%	18%	23%	39%	32%	27%
South West	12%	11%	13%	18%	14%	11%
North	13%	10%	16%	12%	11%	15%
Midlands incl. Eastern	24%	21%	20%	24%	26%	23%
Wales	2%	4%	3%	-	2%	2%

Base: All leaseholders (1,050) 30 April – 1 June 2014

Source: Ipsos MORI/CMA

### Interviews achieved by age

#### AGE



%	Private properties (586) (column %)	LAs (178) (column %)	HAs (124) (column %)	Retirement (131) (column %)	RTMC/RMC (171) (column %)	Non-RTMC/RMC (456) (column %)
25-34	4%	6%	7%	-	2%	6%
35-44	13%	21%	17%	-	10%	15%
45-54	16%	23%	15%	1%	14%	17%
55-64	16%	17%	17%	1%	18%	17%
65-74	23%	22%	23%	18%	33%	21%
75+	24%	11%	22%	79%	21%	23%
Refused	2%	1%	1%	2%	3%	1%

Base: All leaseholders (1,050) 30 April – 1 June 2014

Source: Ipsos MORI/CMA

### Profile of each age group by region

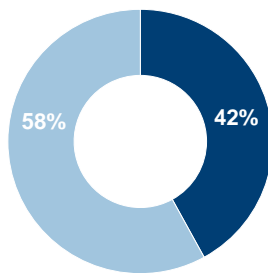
Age /Region	East Midlands (40) (column %)	East of England (119) (column %)	London (255) (column %)	North East (47) (column %)	North West (17) (column %)	South East (278) (column %)	South West (125) (column %)	Wales (28) (column %)	West Midlands (75) (column %)	Yorkshire & the Humber (66) (column %)
25-34	10%	6%	5%	9%	18%	4%	2%	7%	1%	2%
35-44	10%	20%	22%	11%	6%	12%	10%	11%	8%	11%
45-54	15%	15%	24%	9%	18%	17%	13%	14%	9%	20%
55-64	15%	13%	16%	28%	6%	15%	17%	14%	23%	12%
65-74	33%	23%	18%	23%	24%	18%	28%	25%	27%	24%
75+	15%	19%	11%	19%	29%	32%	29%	29%	31%	32%
Refused	3%	4%	3%	2%	-	2%	2%	-	1%	-

### Interviews achieved by gender

#### GENDER

Women

Men



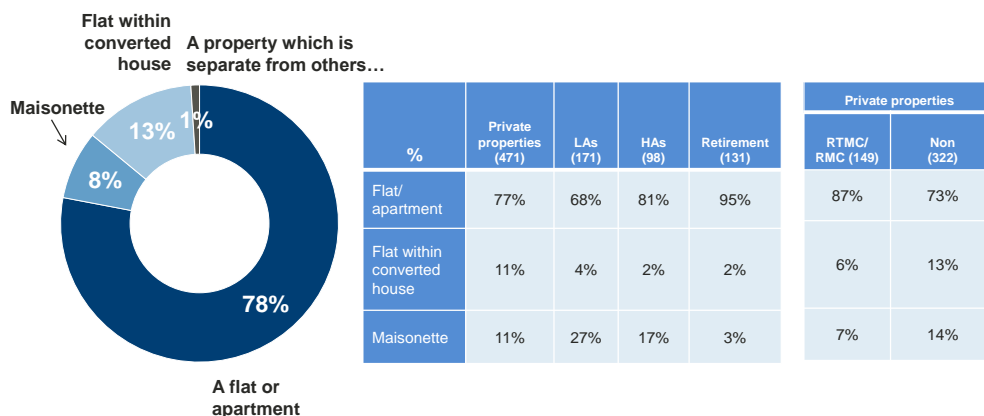
%	Private properties (586) (column %)	LAs (178) (column %)	HAs (124) (column %)	Retirement (131) (column %)	RTMC/RMC (171) (column %)	Non-RTMC/RMC (456) (column %)
Men	44%	39%	44%	30%	46%	43%
Women	56%	61%	56%	70%	54%	57%

Base: All leaseholders (1,050 ) 30 April – 1 June 2014

Source: Ipsos MORI/CMA

### Interviews achieved by property type

#### S5. Still thinking about the main property where you live most of the time, is it...?



Base: All leaseholders (1,050 ) 30 April – 1 June 2014

Source: Ipsos MORI/CMA

## Development size within age

	1-5	6-10	11-20	20+	None of these	Don't know	Total
25-34 (row %)	22%	33%	18%	22%	2%	2%	5%
35-54 (row %)	19%	27%	18%	34%	0%	3%	32%
55+ (row %)	14%	20%	19%	46%	0%	1%	62%
Refused (row %)	18%	18%	23%	32%	0%	9%	2%
<b>Total (row %)</b>	<b>16%</b>	<b>24%</b>	<b>19%</b>	<b>39%</b>	<b>0%</b>	<b>2%</b>	<b>100%</b>

## Development type by region

Region	Private properties (586)	LAs (178)	HAs (124)	Retirement (131)
East Midlands (row %)	56%	25%	19%	13%
East of England (row %)	71%	19%	9%	12%
London (row %)	56%	30%	14%	4%
North East (row %)	74%	12%	14%	13%
North West (row %)	53%	13%	33%	12%
South East (row %)	74%	14%	12%	18%
South West (row %)	67%	18%	15%	19%
Wales (row %)	50%	32%	18%	0%
West Midlands (row %)	74%	12%	14%	16%
Yorkshire & the Humber (row %)	65%	19%	16%	12%

## RTMC/RMC vs non-RTMC/RMC) within age

Age	RTM/RMC	Non-RTM/RMC
25-34	2%	6%
35-44	10%	15%
45-54	14%	17%
55-64	18%	17%
65-74	33%	21%
75+	20%	23%
Refused	3%	1%

## Age within region

	25-34 (column %)	35-44 (column %)	45-54 (column %)	55-64 (column %)	65-74 (column %)	75+ (column %)	Refused (column %)	Total (column %)	25-34 (column %)	35-44 (column %)	55+ (column %)
East Midlands	8%	3%	3%	4%	6%	2%	5%	4%	8%	3%	4%
East of England	14%	16%	10%	9%	12%	9%	23%	11%	14%	13%	10%
London	27%	38%	34%	24%	20%	12%	32%	24%	27%	36%	18%
North East	8%	3%	2%	8%	5%	4%	5%	5%	8%	3%	5%
North West	6%	1%	2%	1%	2%	2%	-	2%	6%	1%	2%
South East	25%	21%	26%	25%	22%	36%	23%	27%	25%	24%	28%
South West	4%	9%	9%	12%	15%	15%	9%	12%	4%	9%	14%
Wales	4%	2%	2%	2%	3%	3%	-	3%	4%	2%	3%
West Midlands	2%	4%	4%	10%	9%	9%	5%	7%	2%	4%	9%
Yorkshire & The Humber	2%	5%	7%	5%	7%	9%	-	6%	2%	6%	7%
Total (row %)	5%	15%	17%	16%	22%	24%	2%	100%	5%	32%	62%

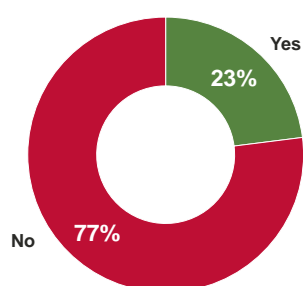
## Profile of each age group by development type

	25-34 (column %)	35-44 (column %)	45-54 (column %)	55-64 (column %)	65-74 (column %)	75+ (column %)	Refused (column %)
Private properties (586)	59%	57%	62%	65%	67%	76%	88%
Local authorities (178)	23%	28%	27%	21%	19%	10%	6%
Housing associations (124)	18%	16%	12%	14%	14%	14%	6%

Retirement properties (131)	-	-	1%	1%	10%	42%	9%
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## Health problems or disability

**DEM3. Do you or does anyone in your household have any long-term illness, health problems or disability which limits your/their daily activities or the work you/they can do, including any problems which are due to old age?**



Do you or does anyone in your household have any long-term illness, health problems or disability which limits your/ their daily activities or the work you/ they can do, including any problems which are due to old age?		
%	Yes (243) (column %)	No (806) (column %)
25-34	3%	5%
35-44	4%	18%
45-64	22%	36%
65-74	29%	20%
75+	42%	18%

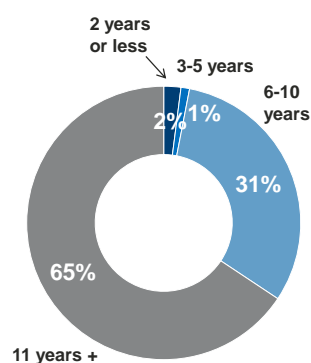
%	Private properties (586) (column %)	LAs (178) (column %)	HAs (124) (column %)	Retirement (131) (column %)	RTMC/RMC (171) (column %)	Non-RTMC/RMC (456) (column %)
Yes	21%	24%	31%	41%	19%	25%
No	79%	76%	69%	60%	81%	75%

Base: All leaseholders (1,050) 30 April – 1 June 2014

Source: Ipsos MORI/CMA

## Length of time as a leaseholder

**BK4. For how long have you been a leaseholder of this property?**



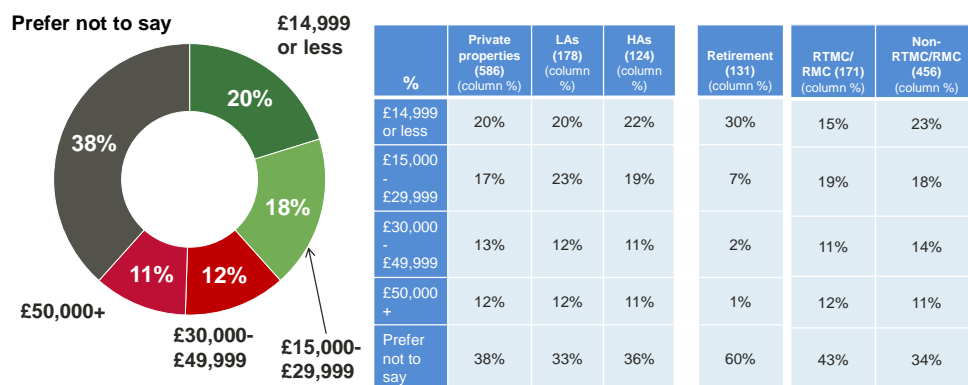
%	Private properties (586) (column %)	LAs (178) (column %)	HAs (124) (column %)	Retirement (131) (column %)	RTMC/RMC (171) (column %)	Non-RTMC/RMC (456) (column %)
2 years or less	2%	2%	1%	2%	-	1%
3-5 years	2%	1%	-	-	1%	1%
6-10 years	31%	31%	40%	32%	28%	33%
11 years +	65%	65%	60%	66%	71%	64%

Base: All leaseholders (1,050) 30 April – 1 June 2014

Source: Ipsos MORI/CMA

## Household income

**DEM4. What is your total household income per year from all sources before tax and other deductions?**

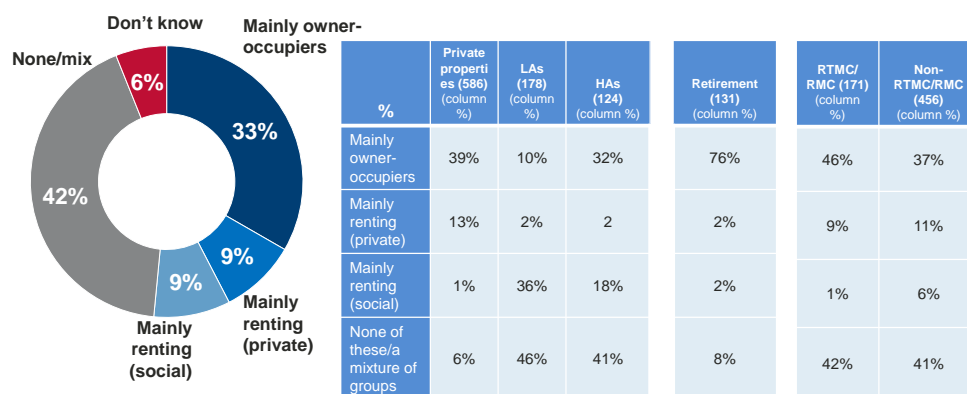


Base: All leaseholders (1,050) 30 April – 1 June 2014

Source: Ipsos MORI/CMA

## Tenancy type

**BK8. As far as you are aware, are other residents in the development...**

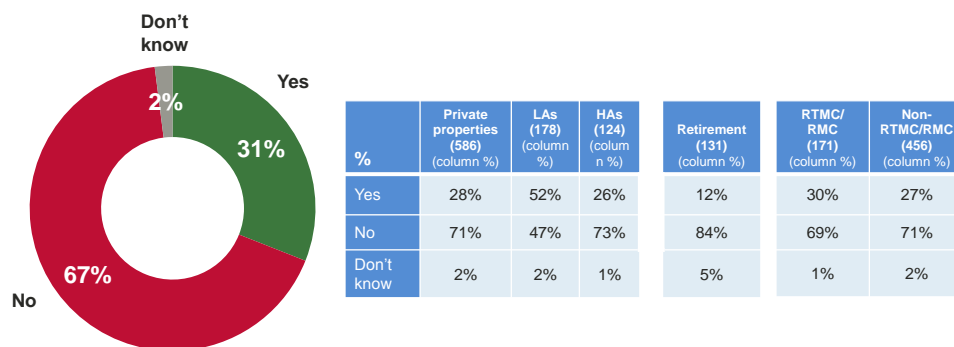


Base: All leaseholders (1,050) 30 April – 1 June 2014

Source: Ipsos MORI/CMA

## Experience of paying for major works

**BK18. In the last 3 years, have you had to pay extra one-off amounts to pay for major works?**



Base: All leaseholders (1,050 ) 30 April – 1 June 2014

Source: Ipsos MORI/CMA

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