

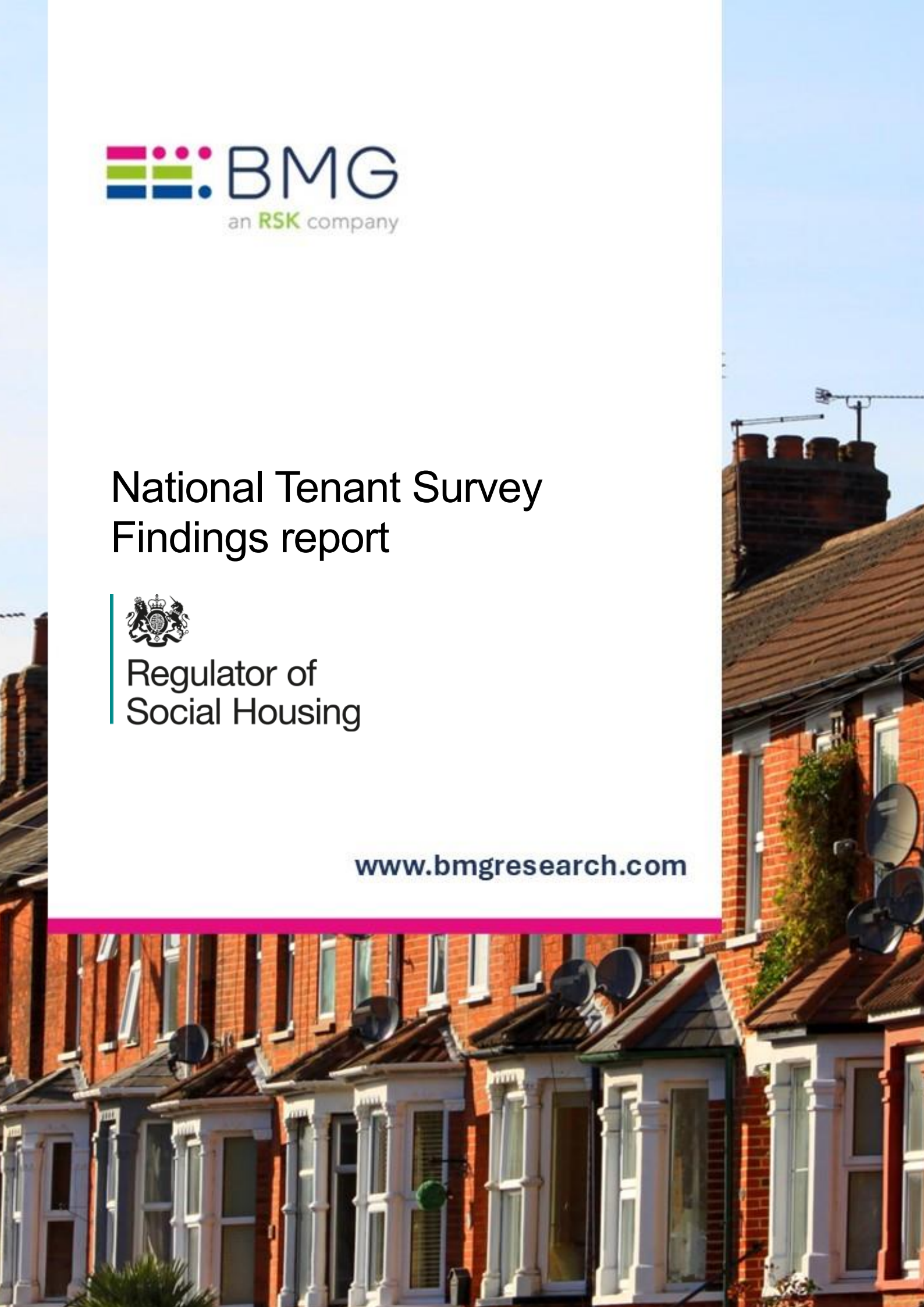


# National Tenant Survey Findings report



Regulator of  
Social Housing

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## Foreword from Regulator of Social Housing



### Regulator of Social Housing

Tenant surveys are an important part of the new approach to consumer regulation introduced from April 2024. Every registered landlord must conduct surveys to generate published Tenant Satisfaction Measures, which support tenants in scrutinising their landlord's performance and provide a source of intelligence to the regulator on whether landlords are meeting new consumer standards. Tenant surveys are also used by landlords to gain greater insight into tenant experiences and opportunities to improve services.

Alongside landlords' own surveys, we consider it is important for the regulator to have a robust and independent understanding of tenant satisfaction across the sector. To this end, a National Tenant Survey (NTS) has been conducted of more than 3,500 social housing tenants and shared owners, with some of them also providing further information through follow-up cognitive interviews. We would like to take this opportunity to thank them for their involvement. This is similar to the approach taken by many other regulators, who complete their own surveys of service users.

The NTS included all perception TSM questions, collected in line with our TSM requirements, as well as additional questions to explore tenants' responses in greater depth. This provides a rich source of information on the type of tenant perspectives reflected in satisfaction scores. In general, this evidence underlines that TSMs reflect direct tenant experience of landlord services and illustrate where there may be opportunities to improve services and outcomes. It also provides greater insight on the tenant perspectives reflected in more novel perception TSMs on complaints, building safety and neighbourhood management.

One aim of the NTS is to understand how average satisfaction scores vary across different groups of tenants. This includes careful statistical analysis to understand the impact of tenant or property characteristics on average satisfaction scores. Tenant age, for example, is the most important contextual factor that influences average satisfaction. While there could be particular factors that influence scores for individual landlords, across the sector there are only a small number of characteristics that have a statistically significant impact on average satisfaction once other characteristics are taken into account. Moreover, the evidence suggests that landlord service delivery is a more important driver of overall satisfaction than tenant or property characteristics.

These NTS findings are published alongside the regulator's analysis of the 2023/24 TSMs. The NTS is part of the evidence that the regulator has used to inform how TSM scores generated by landlords are interpreted and analysed: more information is set out in the [2023/24 TSMs Headline Report](#). The NTS will be considered alongside evidence from landlord surveys and other sources as we continue to develop the approach to using TSMs in regulation and consider refinements to TSM requirements.

# 1 Introduction

## 1.1 Background

The Regulator of Social Housing (“RSH”) is a non-departmental public body, sponsored by the Ministry of Housing, Communities & Local Government (“MHCLG”).

RSH regulates registered providers of social housing in England for a viable, efficient, and well governed social housing sector able to deliver quality homes and services for current and future tenants. Registered providers include local authority landlords and private registered providers (such as not-for-profit housing associations, co-operatives, and for-profit organisations).

In November 2020 the Government published ‘*The Charter for Social Housing Residents: Social Housing White Paper*’ (the “Social Housing White Paper”). In the Social Housing White Paper, the Government set out a commitment to strengthen the regulator’s consumer regulation role, with the introduction of a proactive consumer regulation regime.

The Social Housing White Paper set an expectation that RSH would bring in a set of tenant satisfaction measures (“TSMs”) on issues that matter to tenants. In September 2022, following a sector-wide consultation, the full set of TSMs were published by the regulator alongside detailed technical requirements.

As part of the TSM requirements, all registered providers are required to undertake tenant perception surveys. These surveys must include the 12 set tenant perception questions, with set response scales, as defined in the TSM requirements. Landlords were first required to undertake the TSM surveys in 2023-24 and were required to report their results to the regulator in June 2024.

## 1.2 Research objectives

The National Tenant Survey (“NTS”) was commissioned to support RSH’s understanding of the TSM results collated by providers. The key objectives of the NTS were to:

- Create a robust independent benchmark for tenant satisfaction data across the perception TSMs.
- Give RSH an early idea of tenant satisfaction and an indication of trends or issues that RSH could consider as TSM results are received.
- Improve RSH understanding of contextual and methodological drivers of TSMs.

In particular, the NTS sought to understand some key research questions, including:

- What is the correlation between results from the TSM questions, which are most likely to drive overall satisfaction, and are there any overlaps between questions?
- What can we understand of the reasons behind tenant responses?
- What impact (holding other factors constant) do key stock and tenant characteristics have on the average levels of satisfaction?
- How does satisfaction vary for Low Cost Rental Accommodation (LCRA) and Low Cost Home Ownership (LCHO)?

NTS included detailed qualitative and statistical analysis to answer key research questions. Following a competitive tendering exercise, BMG Research were commissioned to undertake the NTS on behalf of the regulator. The analysis presented in this report is that of BMG Research.

## 2 Executive summary

The National Tenant Survey provides a powerful tool to dig deeper into the TSM perception questions and understand what is driving tenant satisfaction.

Seven in ten Low Cost Rental Accommodation (“LCRA”) tenants (70%) surveyed are satisfied with the service provided by their landlord (TP01), while less than a fifth (17%) are dissatisfied. When exploring what is driving overall tenant satisfaction, the qualitative and statistical evidence suggests that experiences of the responsive repairs service and views on home maintenance are the most important drivers to LCRA tenants – for example, 64% of LCRA tenants that are dissatisfied with overall landlord services cite repairs issues as the reason why. There is also evidence to suggest the TSM questions on neighbourhood management have the weakest impact on overall satisfaction. However, it is necessary to note that neighbourhood management is still an important aspect of service delivery for at least some tenants surveyed.

When carrying out statistical analysis of the NTS results by key stock and tenant characteristics, the findings suggest that a tenant’s age, their landlord size, their sex, whether they live inside or outside of London, or whether they have a disability, all have an independent influence on average overall satisfaction (TP01) for LCRA tenants. Of these characteristics, tenant age is the most influential – tenants over 65 have significantly higher overall satisfaction (82%) compared to other age groups. Once these factors have been controlled for, there is no evidence to suggest that other characteristics examined – such as neighbourhood deprivation, ethnicity, or property age – have any significant influence on overall satisfaction.

The statistical analysis carried out on the NTS results also suggest that tenants’ experiences with the services provided by their landlord – reflected across the range of TSMs – have a stronger influence on their overall satisfaction than the stock and demographic characteristics of a tenant.

Complaints handling has the lowest level of satisfaction amongst all the TSM perception questions (TP09: 35% for LCRA tenants). This question is answered by those tenants who state that they have made a complaint to their landlord over the last 12 months (28% of LCRA tenants). The NTS has provided an opportunity to understand the experience of these tenants in more detail. Feedback from these tenants on the nature of their complaint suggests that around a fifth of these can be clearly classed as complaints under the Complaint Handling Code that applies to landlords, while the remainder are either ambiguous or might be classed as service requests.

Shared owners (LCHO tenants) indicate significantly lower levels of satisfaction than LCRA tenants – half are satisfied with the service provided by their landlord (49%) and over a quarter (29%) are dissatisfied (TP01). Shared owners typically have more limited interaction with their landlord, and lower satisfaction is partly accounted for by ‘neither satisfied nor dissatisfied’ being a more prevalent response than for LCRA tenants. Where shared owners are dissatisfied, stated reasons include rent or service charges (38%), repairs issues (33%), and general customer service (26%). Some of the responses appear to reflect perceptions over the value of money offered by shared ownership in general compared to other tenants – however, many shared owners cite specific issues with communal repairs, safety checks or other services for which landlords are likely to be responsible.

The questionnaire used in the NTS contained all 12 TSM perception questions as well as additional questions to uncover further insight and will be similar to those employed by landlords to generate TSMs. The vast majority stated that the NTS survey was easy to understand (96%), of an appropriate length (95%) and flowed well (94%). A minority (26%) agreed that the survey was repetitive – which is likely to reflect related TSM questions – although most (58%) disagreed with this statement.

### 3 Methodology

This section provides a brief description of the methodology used for the NTS. More detailed information can be found in the accompanying NTS Technical Report.

#### 3.1 Questionnaire

The questionnaire used for the NTS contained all 12 TSM perception questions, stock and tenant socio-demographic questions to be used for analysis purposes, and additional key areas of further exploration designed by BMG and RSH to understand:

- Why tenants provide the response they do for 'TP01: Overall satisfaction'
- Why tenants are not satisfied with the repairs service
- Why tenants provide the response they do for 'TP05: Satisfaction that the home is safe'
- For those tenants who state that they have made a complaint to their landlord over the last 12 months: the nature of a complaint, whether tenants have received a written response to a complaint and how, if at all, complaints handling could have been improved
- Whether tenants have reported anti-social behaviour to their landlord in the last 12 months
- Which aspects of service delivery tenants would most like their landlord to improve
- Feedback on survey length, repetition, and whether questions were easy to understand

#### 3.2 Pilot

A pilot survey was undertaken in February 2024 consisting of 398 LCRA tenants and 20 shared owners (LCHO tenants) using a mixture of telephone and online methods of data collection. Following analysis of the survey responses minor survey amendments were made to how tenant tenure was captured at the beginning of the survey, and to the repairs follow up question. These changes were only minor, and the pilot responses are still comparable and have been included in the final dataset.

Table 1: Number of responses to the NTS pilot survey conducted in February 2024 by tenure and method of data collection

Tenure	Online surveys	Telephone surveys	Total
LCRA	202	196	398
LCHO	18	2	20

#### 3.3 Main fieldwork

The main fieldwork for the NTS was conducted in May and June 2024 using an online, telephone and face-to-face methodology. In total 3,287 LCRA tenants and 394 LCHO tenants participated in the survey.

For the online survey, respondents were recruited using a selection of online panel providers. For the telephone survey, a telephone database was purchased in areas of known high stock density of LCRA / LCHO tenants using 2021 Census information stratified by geographic regions. For the face-to-face survey, sample points were selected in areas of known high stock density of LCRA / LCHO tenants using 2021 Census information stratified by geographic regions. Monitoring targets were set during fieldwork to ensure a representative sample of tenants nationally.

Survey collection methods are similar but not identical to those used by landlords to generate TSMs. The context to the NTS conducted by telephone, online or face-to-face is slightly different to landlords contacting tenants directly using these methods. This is likely to mean, for example, that the observed relationship between average satisfaction and survey collection method may be slightly different in the NTS.

Table 2: Total number of responses to the NTS by tenure and method of data collection (including pilot interviews)

Tenure	Online surveys	Telephone surveys	Face-to-face surveys	Total
LCRA	1,885	1,017	385	3,287
LCHO	184	10	200	394

### 3.4 Cognitive interviews

Following the main fieldwork, 29 in-depth interviews were conducted by BMG amongst 24 LCRA tenants and 5 LCHO tenants to ascertain what tenants are thinking about when they are answering each TSM perception question. This included tenants with varied stock and tenant characteristics and differing levels of satisfaction.

### 3.5 Weighting and confidence intervals

The data presented in this report for LCRA tenants has been weighted to ensure it matches the England profile of LCRA tenants for landlord type, tenant age, region, ethnicity, disability and landlord size. Following weighting, the total effective sample size for LCRA tenants is 2,813 respondents which provides a confidence interval of  $\pm 1.85\%$  for an observed statistic of 50% at 95% confidence level.

The LCHO dataset has been weighted to ensure it matches the England profile of LCHO tenants for property type and region. Following weighting, the total effective sample size for LCHO tenants is 380 respondents which provides a confidence interval of  $\pm 5.03\%$  for an observed statistic of 50% at 95% confidence level.

### 3.6 Analysis

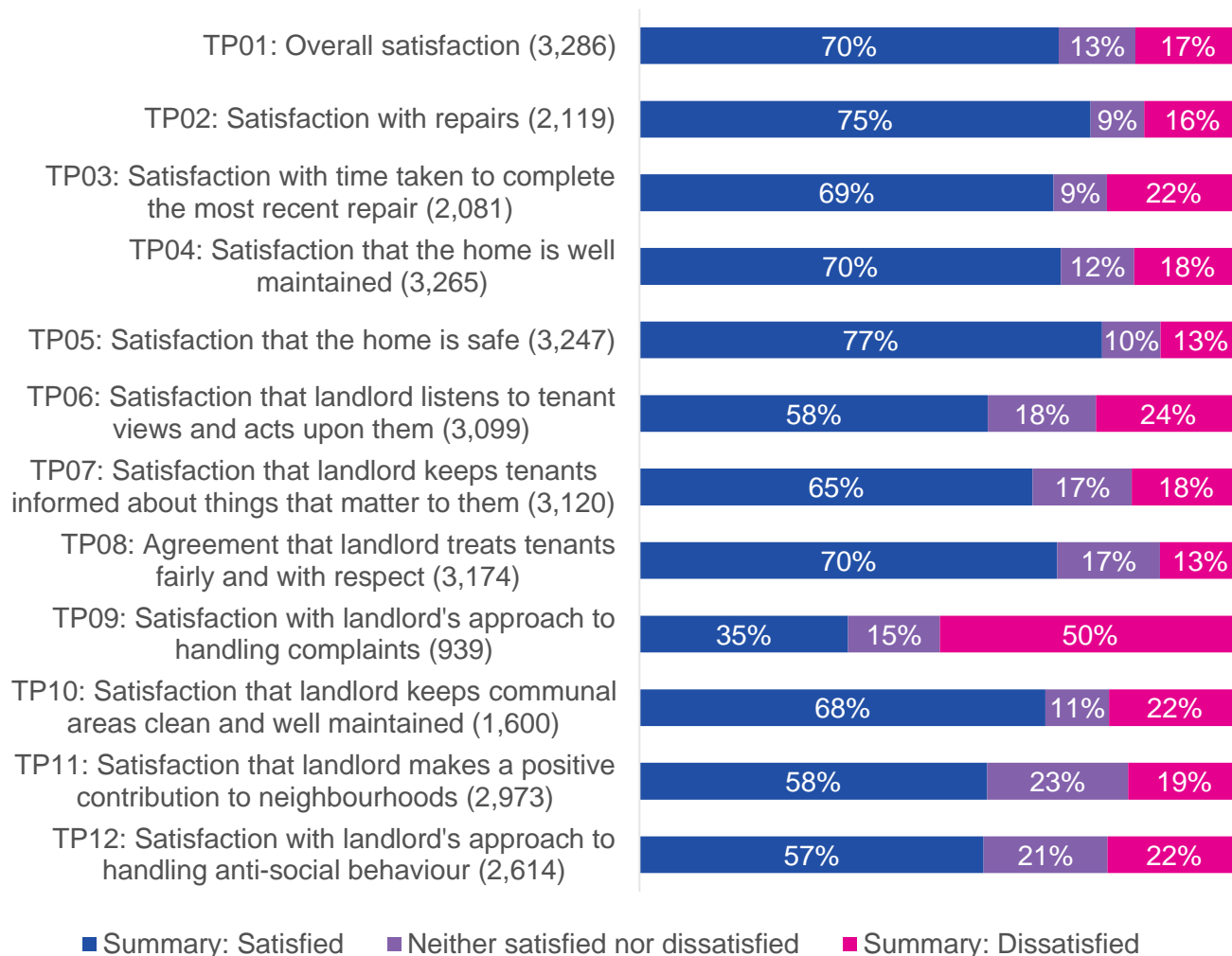
NTS included in-depth statistical and qualitative analysis of survey responses. Reflecting the approach for TSMs, satisfaction scores for LCRA and LCHO tenants are calculated and analysed separately. Due to the larger sample size, the in-depth statistical analysis summarised in this report is limited to responses from LCRA tenants.

## 4 Overview of TSM perception questions

### 4.1 LCRA tenants

Seven in ten LCRA tenants (70%) are satisfied with the service provided by their landlord. Amongst other TSM questions, views are most positive for 'TP05: Satisfaction that the home that is safe', and 'TP02: Satisfaction with repairs'. Perceptions are most negative for 'TP09: Satisfaction with the landlord's approach to handling complaints', indeed, half of LCRA tenants who state they made a complaint to their landlord in the last 12 months indicate they are dissatisfied with their landlord's approach to complaint handling.

Figure 1: Perceptions of TP01 – TP12 indicated by LCRA tenants



Unweighted base sizes shown in parentheses.

TP02 & TP03 are filtered by those who stated they had a repair completed in their home by their landlord in the last 12 months.

TP05, TP06, TP07, TP08, TP11 & TP12 is based on valid responses (removing not applicable / don't know).

TP08 uses a different scale; Strongly agree, Agree, Neither agree nor disagree, Disagree, Strongly disagree. Summarised %'s of agreement and disagreement are shown in the figure above.

TP09 is filtered by those state they made a complaint to their landlord in the last 12 months.

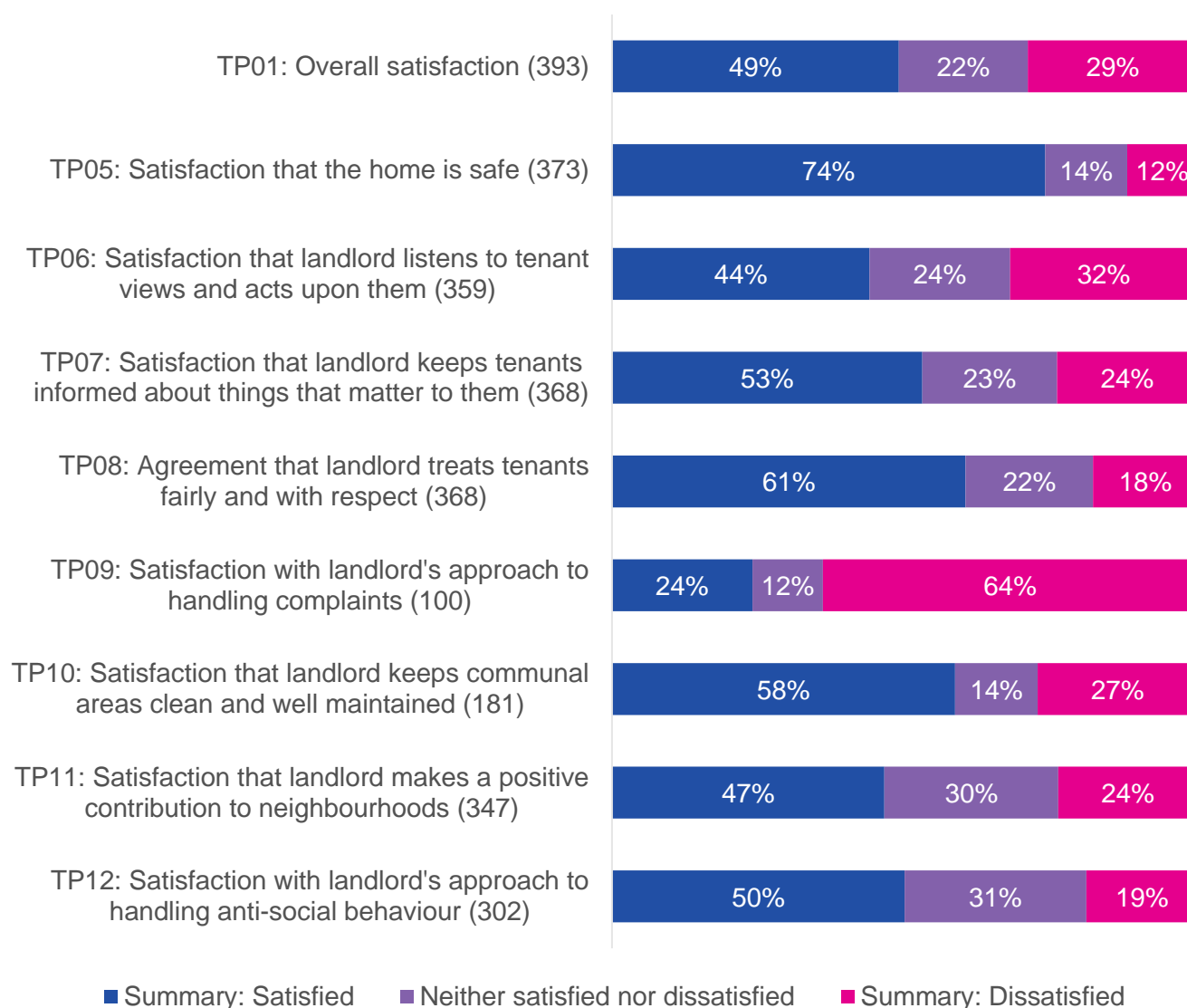
TP10 is filtered by those who state those who state that they live in a building with a communal area, either inside or outside, that their landlord is responsible for maintaining.



## 4.2 LCHO tenants

Half of LCHO tenants are satisfied with the service provided by their landlord. Perceptions are most positive for 'TP05: Satisfaction that the home that is safe', and 'TP08: Agreement that the landlord treats tenants fairly and with respect'. As with LCRA tenants, perceptions are most negative for 'TP09: Satisfaction with the landlord's approach to handling complaints', over three fifths of LCHO tenants who state they made a complaint in the last 12 months indicate they are dissatisfied with their landlord's approach to complaint handling.

Figure 2: LCHO responses to TP01 – TP12



Unweighted base sizes shown in parentheses.

TP05, TP06, TP07, TP08, TP11 & TP12 are based on valid responses (removing not applicable / don't know).

TP08 uses a different scale; Strongly agree, Agree, Neither agree nor disagree, Disagree, Strongly disagree. Summarised %'s of agreement and disagreement are shown in the figure above.

TP09 is filtered by those state they made a complaint to their landlord in the last 12 months.

TP10 is filtered by those who state those who state that they live in a building with a communal area, either inside or outside, that their landlord is responsible for maintaining.

## 5 What is driving satisfaction amongst LCRA tenants

### 5.1 Key messages

In this section we explore what is driving overall satisfaction amongst LCRA tenants. Key messages are as follows:

- The evidence of the NTS underlines that it is direct tenant experience of landlord services that drives satisfaction with their landlord reflected in the TSMs, more so than the stock or demographic characteristics of tenants. This is supported by both statistical and qualitative analysis.
- Repairs and maintenance services appear to be the most significant specific drivers of overall satisfaction among LCRA tenants. For example, throughout the qualitative findings tenants discuss property maintenance, repairs, and overall property condition – of those LCRA tenants that are dissatisfied with overall landlord services, 64% cite repairs issues as the reason why.
- Statistical analysis suggests that experience of specific landlord services, reflected across the range of TSMs (TP02-12), is the primary driver of overall tenant satisfaction with their landlord. Moreover, regression analysis suggests most TSMs have a significant independent impact on '*TP01: Overall satisfaction*'. TSMs on neighbourhood management – '*TP11: Satisfaction that the landlord makes a positive contribution to neighbourhoods*' and '*TP12: Satisfaction with the landlord's approach to handling anti-social behaviour*' – have the weakest impact on overall satisfaction. However, these are clearly important issues for a minority of tenants.
- Factor analysis finds that there are five underlying distinct themes reflected in TSM perception questions: repairs service, safety & maintenance, communication & respect, neighbourhood management & complaints handling.
- Qualitative analysis of NTS responses highlights some of the key issues driving responses to specific TSMs. For example, responses to '*TP05: Satisfaction that the home is safe*' largely reflect perceptions on standard building safety compliance checks, repairs and maintenance, and building security, while a minority of responses reflect crime and anti-social behaviour in the wider neighbourhood.
- There are relatively low levels of satisfaction regarding '*TP09: Satisfaction with the landlord's approach to handling complaints*'. Analysis of qualitative responses to further understand this dissatisfaction suggests that what some tenants consider a complaint, may be logged as a service request by the landlord when following the Complaint Handling Code.

### 5.2 TP01: Overall satisfaction

#### 5.2.1 Drivers of overall satisfaction: tenant feedback

To allow us to understand which key themes are driving satisfaction, when answering '*TP01: Overall satisfaction*', where tenants were satisfied, they were asked to explain why through an open question. These responses were then coded into specified codes that can be quantified and are summarised in the table overleaf.

Several themes are considered for reasons why tenants are satisfied overall. Key themes include a positive customer service (26%) and positive repairs experience (18%). Customer service is the experience tenants have dealing with their landlord and includes communication or support given to tenants with their enquiries. Queries being dealt with promptly, and staff being helpful and caring are frequently mentioned as part of a positive customer service experience. In general, satisfied tenants were less specific about the reasons for their response and 14% suggest they are generally happy or satisfied, whilst 10% have had no issues with their landlord.

Cognitive interviews were undertaken with survey participants to further explore the experiences they considered in answering '*TP01: Overall satisfaction*'. A similar finding was reflected in the cognitive interviews, where tenants were asked about their experiences when answering the overall satisfaction

question. They draw on a variety of experiences, but mainly included how repairs are dealt with and the customer service they receive, with ease of communication and speed of response often cited.

*“If you have anything wrong and you phone them up, they come immediately, they're always very pleasant on the phone. Just the way they help you when you need it.”*

*“If I need any repairs done instead of waiting weeks and months, they will literally send someone out within few days - when I needed a new light put up outside, a new toilet seat or a new door they came within a few days.”*

*“I am fairly satisfied as mostly everything is ok and I understand somethings they can't sort out. The drive needs repairing but they won't do that. The bath broke and they replaced it and they've done other things that needed doing.”*

Table 3: Reasons for satisfaction at TP01: Overall satisfaction. Coded responses to 'Why are you satisfied with the service provided by your landlord?'

<b>Unweighted base of those satisfied at 'TP01: Overall satisfaction'</b>		<b>2291</b>
<b>Summary: Any customer service</b>		<b>26%</b>
	Issues/queries dealt with quickly/promptly/efficiently	12%
	Good customer service	11%
	Good communication/easy to contact/kept informed	2%
	Deal with issues/sort out queries	2%
<b>Summary: Any repairs</b>		<b>18%</b>
	Repairs dealt with quickly/promptly/efficiently	16%
	Carry out repairs	2%
	Good quality of work	1%
	Attend appointments on time/within time slot	>1%
<b>Generally happy/satisfied</b>		<b>14%</b>
<b>No problems/issues</b>		<b>10%</b>
<b>Summary: Any quality/safety of home</b>		<b>3%</b>
	Good quality/condition of home/property	3%
	Feeling safe in home	>1%
<b>Affordable rent</b>		<b>2%</b>
<b>Area is kept clean</b>		<b>2%</b>
<b>Management of ASB</b>		<b>1%</b>
<b>Other</b>		<b>1%</b>
<b>Don't know</b>		<b>6%</b>

### 5.2.2 What impacts overall dissatisfaction

Tenants were also asked what they were thinking about when answering 'TP01: Overall satisfaction', where they were dissatisfied, which is summarised in the table overleaf.

When analysing what tenants consider when they are dissatisfied, repairs dominate (64%). Undertaking repairs are a key part of a property being well maintained and those that take a long time to resolve or are outstanding are a main source of dissatisfaction. Well maintained properties, which is a key driver of overall satisfaction, is mentioned in relation to repairs and more generally (11%). Other wider areas of maintenance such as communal areas (6%) and greenery (1%) are also cited. Customer service is also an area of dissatisfaction (16%), as are costs (8%). In some instances, tenants mention a number of these areas of dissatisfaction within one comment.

Findings from the cognitive interviews show that where there were negative experiences, tenants were able to go into more detail about this experience when explaining their dissatisfaction. They sometimes referred to this experience when answering other questions such as ‘TP02: Satisfaction with repairs’ and ‘TP09: Satisfaction with the landlord’s approach to handling complaints’. As with satisfaction, key themes that were drawn upon for dissatisfaction were centred around repairs, more specifically, how quickly they were resolved, property condition and ongoing maintenance, but also included experiences of anti-social behaviour and complaints not being resolved.

*“The length of time it takes the jobs and work to be done is not the best. It takes a long time to get work completed and sometimes it is not done to the best standard.”*

*“Ongoing repairs that I’ve been trying to get sorted for 6 years. There’s leaky gutters and it pours damp onto the outside of the home and into internal walls. The windows need replacing and the back door doesn’t shut properly.”*

*“They haven’t upgraded this property in years. I’ve had numerous leaks in my roof, and they do a temporary repair, and it never gets finalised properly. It’s impacted me physically as my bedroom always gets leaked. I could see them improving other bungalows which are the same age as mine, but they won’t do mine.”*

*“Lack of communication, lack of resources for repair, poor condition of the housing, poor management on caretaking and no empathy or regards for tenants.”*

Table 4: Reasons for dissatisfaction at TP01: Overall satisfaction. Coded responses to ‘Why are you dissatisfied with the service provided by your landlord?’

<b>Unweighted base of those dissatisfied at ‘TP01: Overall satisfaction’</b>		<b>571</b>
<b>Summary: Any repairs</b>		<b>64%</b>
	Outstanding repairs	39%
	Slow/poor responses to repairs/queries	28%
	Poor quality workmanship	9%
<b>Summary: Any customer service</b>		<b>16%</b>
	Poor customer service/rude/not listening	10%
	Poor communication	6%
	Outstanding queries/issues	>1%
<b>Summary: Any property maintenance</b>		<b>11%</b>
	Poor quality/condition of home/property	9%
	Property maintenance	2%
<b>Summary: Any costs</b>		<b>8%</b>
	Paying for services which we don’t receive	5%
	High level of rent	3%
<b>Summary: Any other maintenance</b>		<b>7%</b>
	Communal maintenance	6%
	Greenery maintenance	1%
<b>Not dealing with problem neighbours</b>		<b>4%</b>
<b>Not looking after vulnerable tenants</b>		<b>4%</b>
<b>Not helping with trying to move</b>		<b>1%</b>
<b>Do not feel safe in home</b>		<b>&gt;1%</b>
<b>Other</b>		<b>2%</b>
<b>Don’t know</b>		<b>&gt;1%</b>

### 5.2.3 Drivers of overall satisfaction: statistical analysis

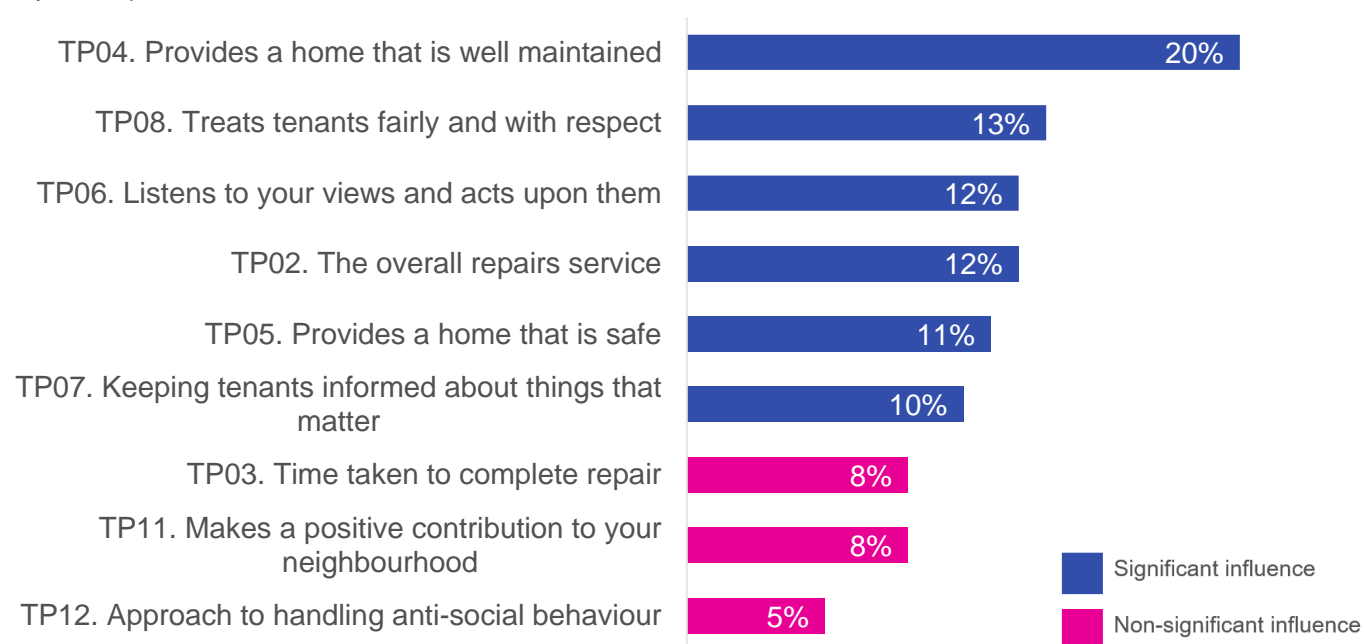
There is a positive correlation between ‘TP01: Overall satisfaction’ and other TSM questions (TP02-12) covering tenant perspectives on particular landlord services: tenants that are satisfied with particular services are more likely to be satisfied overall. Regression analysis can be used to help us understand which specific TSM questions have the largest influence on a tenant’s overall satisfaction (TP01) with their landlord. To understand this, a broad logistic regression model was run using the TSM perception questions asked to LCRA tenants. This model tests the extent to which there is a statistically significant influence of tenant responses to particular TSM questions on overall satisfaction, holding responses to all other TSMs constant.

This analysis suggests that LCRA tenants’ views on ‘TP04: Satisfaction that the home is well maintained’ is the individual TSM with the strongest influence on their perceptions of ‘TP01: Overall satisfaction’. The influence of repairs is also relatively important and is covered across ‘TP02: Satisfaction with repairs’ and ‘TP03: Satisfaction with time taken to complete most recent repair’.

In general, this regression analysis found that there was generally significant evidence that individual TSMs had an independent influence on overall tenant satisfaction. The influence of ‘TP11: Satisfaction that the landlord makes a positive contribution to neighbourhoods’ and ‘TP12: Satisfaction with the landlord’s approach to handling anti-social behaviour’ is weakest, and in the regression shown below there is no significant evidence that these impact on overall satisfaction. However, these are clearly important issues for some tenants and in particular there is strong evidence that TP12 has an impact on satisfaction for those tenants who reported anti-social behaviour to their landlord in the last 12 months.

Importantly, when reviewing the variation in satisfaction that can be explained by this model (i.e., the Nagelkerke R Squared value of 69%) this research finds that tenants’ perspectives on services provided by their landlord has a much stronger influence on their views of ‘TP01: Overall satisfaction’ than the stock and demographic characteristic of a tenant. The analysis shows that some tenant characteristics, such as age and region, can have an influence on reported satisfaction (see below section ‘The impact of stock and tenant characteristics on LCRA satisfaction’ for more details). However, it suggests that experiences with the services provided by their landlord have a stronger influence on overall satisfaction.

Figure 3: Broad regression and streamlined shapely regression model undertaken on TP01: Overall satisfaction (% relative importance)



Nagelkerke R Squared for broad regression model = 69%. This regression has TP01 as a dependent variable, and specific TSMs as independent variables (TP02, TP03, TP04, TP05, TP06, TP07, TP08, TP11, TP12).

#### 5.2.4 Themes reflected in the TSM questions: statistical analysis

Correlation analysis allows us to understand the extent to which tenants tend to respond in the same way to different TSM questions. For example, tenants that are satisfied that the home is well-maintained are also more likely to be satisfied that the landlord provides a home that is safe. When data is highly correlated, like the TSM questions are, factor analysis<sup>1</sup> can be used to understand what relationships exist between the correlated questions, and by grouping responses together, we can extract what underlying themes (or factors) exist within the data.

BMG factor analysis on the TSM perception questions shows there are five distinct underlying themes captured across TSM perception questions TP02 – TP12:

- **Repairs service:** i.e., TP02: Satisfaction with repairs & TP03: Satisfaction with time taken to complete most recent repair.
- **Safety & maintenance:** i.e., TP04: Satisfaction that the home is well maintained & TP05: Satisfaction that the home is safe.
- **Communications & respect:** i.e., TP07: Satisfaction that the landlord keeps tenants informed about things that matter to them & TP08: Agreement that the landlord treats tenants fairly and with respect.
- **Neighbourhood management:** i.e., TP11: Satisfaction that the landlord makes a positive contribution to neighbourhoods & TP12: Satisfaction with the landlord's approach to handling anti-social behaviour.
- **Complaints handling:** i.e., TP09: Satisfaction with the landlord's approach to handling complaints.

Although this research finds that there are distinct underlying themes it is important to recognise these are not exclusively linked to individual TSM perception questions, highlighting how each individual TSM perception question may influence the views of another. For example, the table overleaf highlights one set of factor analysis undertaken on the TSM perception questions and shows the extent to which each TSM perception question contributes to each theme. A figure lower than 0.4 is generally considered to mean that the question does not contribute to that theme, whilst a figure greater than 0.6 is generally considered to mean that the question has a significant contribution to that theme. This shows that views on '*TP08: Agreement that the landlord treats tenants fairly and with respect*' are linked to views on safety & maintenance and communications & respect.

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<sup>1</sup> Principal component analysis  
National Tenant Survey  
Regulator of Social Housing

Table 5: Factor analysis undertaken on TP02 – TP12 (excluding TP10) filtered on those who have had a repair completed in their home by their landlord, and made a complaint to their landlord, in the last 12 months.

TSM perception question	Repairs service	Safety & maintenance	Communications & respect	Neighbourhood management	Complaints handling
TP02: Satisfaction with repairs	<b>0.75</b>	<b>0.40</b>	0.21	0.17	0.19
TP03: Satisfaction with time taken to complete most recent repair	<b>0.87</b>	<b>0.16</b>	0.22	0.17	0.20
TP04: Satisfaction that the home is well maintained	<b>0.43</b>	<b>0.62</b>	0.35	0.20	0.29
TP05: Satisfaction that the home is safe	0.25	<b>0.85</b>	0.22	0.23	0.20
TP06: Satisfaction that the landlord listens to tenant views and acts upon them	0.36	0.34	<b>0.52</b>	0.28	<b>0.52</b>
TP07: Satisfaction that the landlord keeps tenants informed about things that matter to them	0.29	0.25	<b>0.80</b>	0.30	0.21
TP08: Agreement that the landlord treats tenants fairly and with respect	0.25	<b>0.48</b>	<b>0.58</b>	0.27	0.32
TP09: Satisfaction with the landlord's approach to handling complaints	0.26	0.25	0.25	0.30	<b>0.81</b>
TP11: Satisfaction that the landlord makes a positive contribution to neighbourhoods	0.23	0.26	0.29	<b>0.63</b>	<b>0.44</b>
TP12: Satisfaction with the landlord's approach to handling anti-social behaviour	0.16	0.18	0.22	<b>0.90</b>	0.17

### 5.3 Improvements

All LCRA tenants were asked to select from a list of TSM perception question themes, which three areas they would most like their landlord to improve. Reiterating what was found in the previous section, the top two service aspects that tenants would like to see improved are the repairs service and keeping homes well maintained. A tenant’s likelihood to select these two service aspects increases significantly amongst those who are dissatisfied with the overall service provided by their landlord; amongst this cohort 62% state they would like their landlord to improve the repairs service, and 41% state they would like their landlord to improve home maintenance.

All the TSM perception themes are a priority for at least some tenants, and tenants who have experienced a particular service are likely to see this as more important. In particular, of those tenants who stated they have reported anti-social behaviour to their landlord in the last 12 months, around half (48%) state they would like to see their landlord improve their approach to handling anti-social behaviour and this is the top service improvement for this cohort. For all other groups (those who claimed they have had a repair completed in their home by their landlord or made a complaint to their landlord in the last 12 months, or those who state they live in a building with a communal area that their landlord is responsible for maintaining) the repairs service remains the top service priority to be improved.

Figure 4: In which areas would you most like your landlord to improve the service you receive? Responses to prompted list



Unweighted base = 3,287. Multiple response (respondents could select up to 3 options).



## 5.4 Responsive repairs

Nearly two thirds (64%) of tenants state that their landlord carried out a repair to their home in the last 12 months. When undertaking regression analysis to understand drivers of overall satisfaction filtered by this group, it shows that although views on 'TP02: Satisfaction with repairs' have a significant impact on a tenants' overall satisfaction with their landlord, 'TP04: Satisfaction that the home is well maintained' is the strongest driver.

Three quarters of tenants who have received a repair in the last 12 months are satisfied with the repairs service. Those tenants who were dissatisfied with the repairs service were asked to select from a list, the main reasons why they were not satisfied.

Amongst the 16% of tenants dissatisfied at with the repairs service, the quality of work (52%), repairs being incomplete (44%) and the time taken to resolve repairs (time taken before work start 52%, speed of completion 44%) are reasons for dissatisfaction. These are issues that also dominate reasons for dissatisfaction on 'TP01: Overall satisfaction'. Amongst those tenants with a disability, 'not considering disabilities and vulnerabilities' was significantly higher at 28%, compared to the total sample (19%).

Other mentions include poor communication and repairs not being carried out as well as more specific issues. Tenants in the cognitive interviews also highlighted the convenience of repair appointments, communication amongst staff and contractors, and the number of visits needed to complete the repair, as components of a good repairs service and reasons for their dissatisfaction.

Figure 5: What are the main reasons why you are not satisfied with the repairs service? Responses to prompted list for those who are dissatisfied with overall repairs service



Based on those dissatisfied at 'TP02: Satisfaction with repairs'. Unweighted base: 525

In the cognitive interviews 'quality of work' was explored in more detail to try to gain an understanding of what tenants thought about this, and it tended to focus on the work being done to a 'good standard'. Tenants were also thinking about whether the root cause of the issue was resolved, the time taken, and the number of visits needed to complete the repair. Tenants consider not only the quality of the work, but the quality of the overall repairs process.

When thinking about time frames for repairs in the cognitive interviews, tenant expectations were based on a mix of personal expectations and given timeframes from the landlord. Most think of the repairs process timeframe from initial reporting until it is completed. Where repairs were carried out well, this was recognised in the cognitive interviews.

*"Come and do a repair but overlook the rest of the problems. Repair one thing in bathroom, but don't fix the other."*

*"Overall quality of work because they haven't finished the issues, it doesn't feel applicable."*

## 5.5 Safety & maintenance

### 5.5.1 Feeling safe in the home

77% of tenants are satisfied that their landlord provides a home that is safe and these tenants were asked why they feel this way to understand feelings of safety through an open question. These responses were then coded into specified codes that can be quantified. The key themes that were raised by tenants were building safety compliance (17%), the security of the building (12%) and repairs and maintenance (10%). As seen for responses to understand 'TP01: Overall satisfaction', tenants are less specific if they are satisfied that their home is safe, with 14% talking more generally about feeling safe.

Building safety compliance includes standard checks such as annual gas safety checks and good fire safety measures. Many tenants are aware of required safety checks that should be carried out in their homes and mention these unprompted as a source of satisfaction with safety. Tenants drew a distinction between safety compliance and building security, which detailed more about access points into their property such as secure windows and doors.

*"Repairs are always done and gas and electrical tests are kept up to date."*

*"Fire alarms and carbon monoxide detector, boiler maintenance all are kept functioning by them."*

*"They have put new windows in that are better and stronger than the ones previously. Also installed a more solid front door."*

*"Home is maintained and safe to live in with kids."*

### 5.5.2 Not feeling safe in the home

Tenants who were dissatisfied with the safety of the home were also asked to detail their reasons through an open question. 13% of tenants are dissatisfied with home safety and their reasons for this can be split into three main areas: repairs (50%), building security (17%) and crime or anti-social behaviour issues (14%).

Dissatisfaction with repairs in general cover the waiting time (26%) and poor quality of the workmanship when repairs are completed (4%). There are also frequent mentions of damp and mould (17%) being left untreated and the impact that has on the health and safety of those living in the property.

As with satisfaction for safety of the home, building security is an area where tenants are dissatisfied, particularly issues with access points. Crime and anti-social behaviour in the local area also leads to dissatisfaction with feeling safe in the home. This is significantly higher amongst those who have reported anti-social behaviour (26%), than those who haven't (6%).

*“We have a malfunctioning carbon monoxide alarm, and this is one of the issues raised with them, which they have ignored. Their negligence also led to a fire taking place in our block.”*

*“We have black mould everywhere that we have mentioned multiple times to our landlord, and it still has not been sorted. My brother has asthma, so the black mould does not help with his condition. We have a home that was decorated as quickly and inefficiently as possible before we moved in and have been told its down to us to sort when it should have been in an acceptable condition when we moved in.”*

*“The lock on the front door is so weak that it's very easy to break in for somebody. It's happened in the past. So no, I don't feel safe.”*

*“I have had issues with antisocial behaviour from an abusive neighbour, but my landlord has not done anything to resolve this.”*

In the cognitive interviews similar experiences were drawn upon for dissatisfaction with safety of the home. Tenants talked about annual safety checks and the structural safety and security of the building, including doors, locks and windows. Some cited communal issues related to safety in the home, such as issues with shared entry points and damp proofing of the building. There was also an element of personal safety in dissatisfaction with neighbours, impacting on feelings of safety and anti-social behaviour in communal areas such as drug taking or noise.

*“One of my neighbours has left wood boards in the hall for over a year. If we need to evacuate in a fire it's not safe. I've told the landlord and they didn't do anything.”*

*“The next block over from me has a new metal front door put in as has the one next to them, and we've got nothing, so that's a downer.”*

## 5.6 Communication & respect

### 5.6.1 Feeling listened to and having views acted upon

Tenants satisfied that their landlord listens to their views and acts upon them is at 58%, which is a key driver of overall satisfaction and a constant theme throughout the open responses. During the cognitive interviews tenants were asked what experiences they thought about when responding to 'TP06: Satisfaction that the landlord listens to tenant views and acts upon them'. This was to understand whether tenants considered service interactions or more formal engagement opportunities when answering the question.

Most tenants discuss feeling listened to when contacting their landlord for enquiries or service requests. This is predominantly around repairs and complaints, especially if they did not receive a satisfactory response. We have seen in other TSM questions, particularly 'TP01: Overall satisfaction', that not feeling listened to when reporting repairs or complaints leads to a sense of dissatisfaction. Very few mention more formal engagement opportunities like taking part in surveys or resident groups.

*“Landlord only acts on them if they agree with them. Hardly ever see them, so thinking about calling up if need something.” Cognitive interview*

*“Thinking of issues, about repairs and complaints, and how they haven't gotten back to me.” Cognitive interview*

*“Not one to raise things to landlord, haven't really put views forward. Not been given any engagement opportunities. Send a pamphlet every 6 to 12 months to all customers if you have any issues, but no reason to contact them.” Cognitive interview*

## 5.6.2 Keeping tenants informed

65% of tenants are satisfied their landlord keeps them informed, and as seen in the regression analysis this has a significant influence on tenants' overall satisfaction. In contrast to 'TP06: Satisfaction that the landlord listens to tenant views and acts upon them', tenants considered more formal communications from their landlord when answering this question, including newsletters, letters and magazines. There was also a sense that these types of communication are more generic and not personalised or relevant to them.

To a lesser extent, some mention transactional communications, particularly around repairs and complaints when thinking about being kept informed. This links back to overall dissatisfaction, where poor response to repairs and poor communication is cited as a source of dissatisfaction.

*"Receive monthly email newsletter with news and activities, can learn about what is going on with local info."*

*"Thinking of letters, they get from them. Notification of issues or change of housing officer."*

*"Send rent statement with newsletter once a year, can't think of anything else. Send appointment letters."*

## 5.6.3 Treated fairly and with respect

Most tenants (70%) agreed with 'TP08: Landlord treats me fairly and with respect'. In the cognitive interviews we asked tenants what being treated fairly and with respect meant to them to provide a level of understanding about fair treatment of tenants.

The majority of those taking part in cognitive interviews were thinking about how they are treated when contacting their landlord (mainly by phone) when answering this question. It is linked to more general feelings around their customer service experience, for example, whether staff are polite to them and show an active interest in their requests. Those who have less interaction with their landlord find it harder to elicit specific experiences they think about when considering this question.

*"Thinking about ringing them or when need a repair and contractor. Respectful, so treating you like an equal."*

*"Most of the time people are very nice. When you speak to people and say you have a repair issue, they act quickly."*

*"Staff polite and friendly, helpful when ring you up."*

## 5.7 Neighbourhood management

### 5.7.1 Those who live in a building with a communal area

Around half of tenants live in a building with a communal area and 68% of these suggest they are satisfied their landlord keeps the communal areas clean and well maintained. When asked in the cognitive interviews what they considered as communal areas, most tenants mentioned areas inside buildings such as hallways, stairways and lifts. Some also mentioned external communal areas such as gardens and parking. There was little evidence that tenants were considering other facilities outside of the vicinity of their building (e.g. local parks, leisure facilities).

When considering satisfaction with 'TP10: Communal areas clean and well maintained', tenants thought about regular cleaning of hallways and stairwells and whether grass cutting was done sufficiently. No matter the area being discussed, functionality was considered over decoration, meaning that if communal areas are still functional, then tenants were mostly satisfied.

*"The gardeners do the front, but they won't come around to the back, so I actually do the back. I do the flower bed out there because it was just full of weeds. It was depressing."*

*“When they switch over the contracts and get a new person coming in, to start with everything’s fine. They Hoover, they get rid of the cobwebs and things like that. Then as time goes on, different people come in and they only Hoover the bottom bit and then they don’t even go up the stairs. I dread to think what it’s like up there.”*

*“No major issues, could do with a good paint job but other than that it’s fine.”*

### 5.7.2 Positive contributions to neighbourhood

58% of tenants feel their landlord makes a positive contribution to their neighbourhood. Whilst the impact on overall satisfaction is lower for this metric it reflects an important part of regulatory standards. During the cognitive interviews, tenants were asked what type of contributions they were thinking about when answering ‘TP11: Satisfaction that the landlord makes a positive contribution to neighbourhoods’ to understand what that means to tenants and how they interpret the question.

This question received the most variety with regards to how this can be interpreted and experiences that contribute towards it. The appearance of the local area is most cited, such as it being clean, litter free and that the grass is cut. Other mentions included anti-social behaviour, street lighting, social events and facilities, food banks, affordable housing, green areas, paths and litter. Many of the neighbourhood issues cited are not likely to be their landlord’s direct or sole responsibility.

Some local authority tenants think more widely about council services such as waste collections, fly tipping, pavements, parks and putting on events. However, these are also mentioned by housing association tenants, who also cite street lighting and maintaining greenery (cutting grass, hedges etc.). Some tenants explicitly recognised that the landlord was not solely responsible for providing the contributions mentioned and others found it difficult to answer as they were unsure what the landlord contributed.

*“They paid for a tree surgeon to maintain the trees in the local area, they’re not on their land, but they didn’t pass on the costs to us residents.”*

*“The local area is untidy, grass 8ft tall, full of rubbish. Streets are clean and bins emptied, but area is unattractive, looks scruffy and untidy. They don’t keep on top of vandalism or fly tipping. Local shops have closed down. Local parks are lovely.”*

### 5.7.3 Reporting anti-social behaviour

Satisfaction with the landlord’s approach to handling anti-social behaviour (TP12) was 57% across LCRA tenants. A minority of tenants stated that they had reported ASB (16%) to their landlord over the last 12 months – these tenants were much less satisfied with ASB handling (TP12: 31%) compared to those that had not reported ASB (TP12: 64%). Moreover, this suggests that the incidence of ASB in a neighbourhood may influence this satisfaction score (TP12). Amongst those who have reported anti-social behaviour, this generally has an important impact on overall satisfaction with their landlord. In the cognitive interviews we explored what constitutes anti-social behaviour to understand the top-of-mind issues for tenants.

When exploring this question in the cognitive interviews, those who had not experienced or reported anti-social behaviour found it more difficult to answer. In such cases, respondents considered more general neighbourhood issues or issues they had heard about from other neighbours, in place of their own experience. Those who do mention personal experiences suggest they don’t always report it as they don’t think anything will be done based on perceptions of their landlord or others’ negative experiences, or they do not feel it is the landlord’s responsibility. However, those who do think it is the landlord’s responsibility do expect support in resolving the issue.

*“People who don’t have respect for neighbours, revving their car engines outside the gate. Parents that don’t take control of own children, playing up street or in neighbour’s garden.” Cognitive interview*

*“People coming and going at all hours, doing car races, youths blocking paths.” Cognitive interview*

*“Never had to ask them to deal with it, but aware have a department for dealing with it so fairly sat they would deal with.” Cognitive interview*

## 5.8 Complaints handling

Within the survey, 28% of LCRA tenants stated that they have made a made a complaint to their landlord in the last 12 months. Of these, only 35% are satisfied with their landlords’ complaint handling. Understanding the experience of these tenants in more detail is one of the key research questions for the NTS.

### 5.8.1 Nature of complaints

Those tenants who stated that they had made a complaint in the last 12 months were asked to describe the nature of their complaint. This is to understand the issues tenants are raising, but also to seek to reconcile the experience of tenants with the data on complaints generated by landlords. Landlords are required to record the number of complaints as defined by the Complaint Handling Code published by the Housing Ombudsman. The Code draws a specific distinction between service requests and complaints – examples of each are set out in the Code, which defines complaints as follows:

*‘An expression of dissatisfaction, however made, about the standard of service, actions or lack of action by the landlord, its own staff, or those acting on its behalf, affecting a resident or group of residents.’*

For tenants who report having made a complaint, their description suggests that around a fifth of these (i.e. 6% of NTS responses) could be clearly classed as complaints under the Complaint Handling Code. These describe clear issues that tenants are raising with service delivery. The remainder are either ambiguous or might be classed as service requests under the Code. Repairs and maintenance issues constitute the majority of issues that tenants report complaining about (59%). Particular issues include taking too long to deal with repairs, damp and mould, issues with plumbing and heating and poor quality of workmanship.

Examples of the types of complaints cited by NTS respondents are as follows, with reference to whether they might be categorised under the Complaint Handling Code:

*“The roof of the kitchen remains in a state of disrepair, it needs plastering and painting since it was damaged by a leaky roof, almost two years ago.” Complaint*

*“Important work was meant to be done, and we were not contacted at all by the landlord to do the repairs. It took about nine months for the repair to be done, and this was after many attempts at contacting on our behalf. Their communication is awful really.” Complaint*

*“Behaviour, attitude, the staff’s attitude seemed to be like we were being treated like we were children, we were not able to make our own assessments on certain situations and decisions on situations, several others complained it has corrected to a certain extent, sometimes it’s still there.” Complaint*

*“My central heating failed and being gas, I didn’t feel that I should touch it. I spoke immediately the Housing Repairs department, and they told me it would be looked into as soon as was possible.” Service request*

*“It was regarding mould, I contacted them via their helpline.” Service request*

*“Trying to get some movement on new kitchen.” Ambiguous response*

*“Over charging of rent.” Ambiguous response*

### 5.8.2 Improvements to complaints handling

Tenants who stated that they had raised a complaint were asked to explain how, if at all, their landlord could improve the way their complaint was handled. This was to gain further understanding around the complaint process and what could be done to improve the low levels of satisfaction with complaint handling.

When asked how landlords could have improved the complaints handling process, almost one in five (17%) say the process could not have been improved. Customer service is a key area for improving the complaints process, predominantly resolving issues (28%), responding quicker (14%) and better communication (13%). Themes we have seen consistently in response to other TSM questions.

*“The complaint hadn't been handled because they haven't done the job yet. they were going to let me know what was going to happen, but they haven't done so.”*

*“First that they respond on time; that they communicate within their different departments; that they do no falsify information saying things were done when they were not.”*

*“Dealt with my request really. Communication to let me know that it's not been forgotten about and they're still going to repair the damage they've caused.”*

Respondents who had complained in the cognitive interviews were asked about the process of complaining and how it could be improved. Tenants who suggested they had complained were more likely to do so over email or phone and it tended to be in relation to dissatisfaction with a repair. Those that appear to be a complaint as defined by the Complaint Handling Code did often receive a written response. Some acknowledged that they had complaints, but did not report them or follow them up as they felt there was little point.

The cognitive interviews highlighted that communication is key in the complaint process, particularly acknowledging and updating tenants. Satisfaction with complaints handling depended mostly on whether they received a response, whether there was an outcome they were happy with, and the time it took to resolve it. Staff attitude also played a role in satisfaction, some respondents felt as if they were not listened to or were being treated with disrespect by staff when complaining. In some cases, tenants felt that landlords blamed contractors, and that the landlord should follow up on repairs to check everything has been resolved. Tenants felt the complaints process would be improved by landlords acknowledging the complaint and receiving a response from them.

*“Lady rang me back and was very understanding and explained how I could take it further.”*

*“They could have got back to me and explained their side of things. I just wanted a response.”*

## 6 The impact of stock and tenant characteristics on LCRA satisfaction

### 6.1 Key messages

This section explores how levels of satisfaction indicated by LCRA tenants to the TSM perception questions differ by key stock and tenant characteristics. Key messages include:

- Of the characteristics tested, tenant age has the biggest impact on overall tenant satisfaction. Tenants over 65 have significantly higher average overall satisfaction (82%) compared to other age groups.
- Tenants of larger landlords (40,000 or more units) have significantly lower average satisfaction (61%) than smaller landlords. This is particularly evident for '*TP09: Satisfaction with the landlord's approach to handling complaints*'.
- Tenants in London have significantly lower overall satisfaction (61%) than tenants outside of London, this is particularly evident for TSM perception questions about repairs & maintenance.
- When controlling for other factors, there is no evidence to suggest that overall satisfaction is different when analysing by landlord type (PRP vs LA), neighbourhood deprivation levels, ethnicity, property age, property size or property type, or household composition.

### 6.2 Overview

The stock and tenant characteristics examined in the NTS below have been carefully derived from information supplied by tenants through the NTS survey. This includes, for example, matching tenant postcode to geographical information on deprivation or urban and rural classifications published by the Office for National Statistics.

The analysis below presents two types of statistical tests. First, simple pairwise results test for significant evidence that average satisfaction for one group of tenants is different from other tenants. This is a descriptive statistic and does not control for the inter-relationships between variables. Second, regression analysis tests for the impact of each characteristic on overall satisfaction *controlling for all other characteristics*. This regression analysis is the most robust test as to whether a characteristic has an independent influence on satisfaction and is the basis for the key messages summarised above.



### 6.3 Differences in satisfaction for TP01: Overall satisfaction

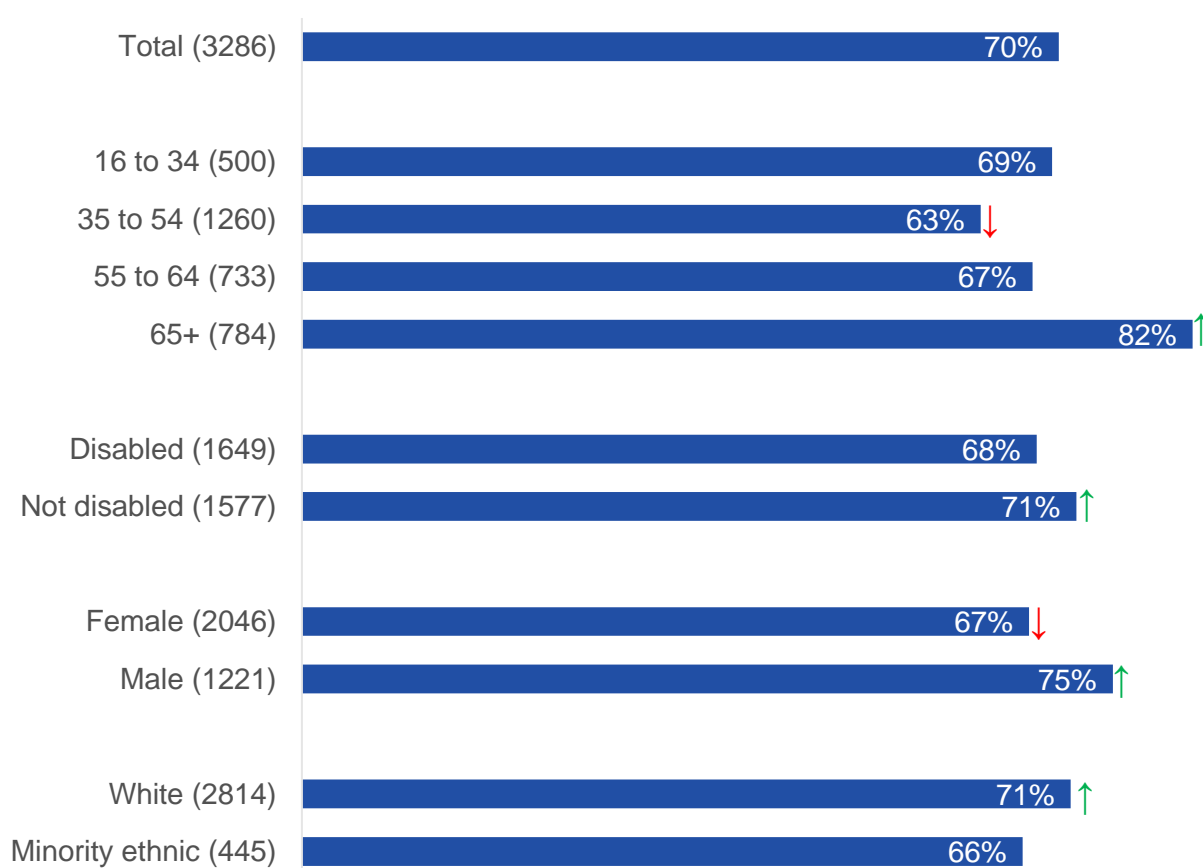
#### 6.3.1 Age, disability, gender, and ethnicity.

When analysing levels of satisfaction to 'TP01: Overall satisfaction' by age we find that those aged 65 or over are significantly more satisfied than tenants aged under 65. Whereas those aged 35 to 49 are significantly less satisfied than tenants of all other age groups.

There is significant evidence that tenants who state they have a physical, or mental health condition are less satisfied than tenants who do not have a disability, although the difference in overall satisfaction between these two groups is relatively small (68% vs 71%). Female tenants are significantly less satisfied with 'TP01: Overall satisfaction' than male tenants.

There is some indication that tenants who would describe their ethnicity as white are more satisfied than other tenants. However, regression analysis suggests that this is likely to be due to other characteristics of this cohort (e.g. 32% of white tenants are aged 65 or over, compared to just 6% of minority ethnic tenants) – there is no significant impact of ethnicity on average satisfaction controlling for other factors.

Figure 6: Levels of satisfaction to TP01: Overall satisfaction by age, disability, and ethnicity



Unweighted base sizes shown in parenthesis.

↑ Satisfaction is significantly higher than the total using a simple pairwise test

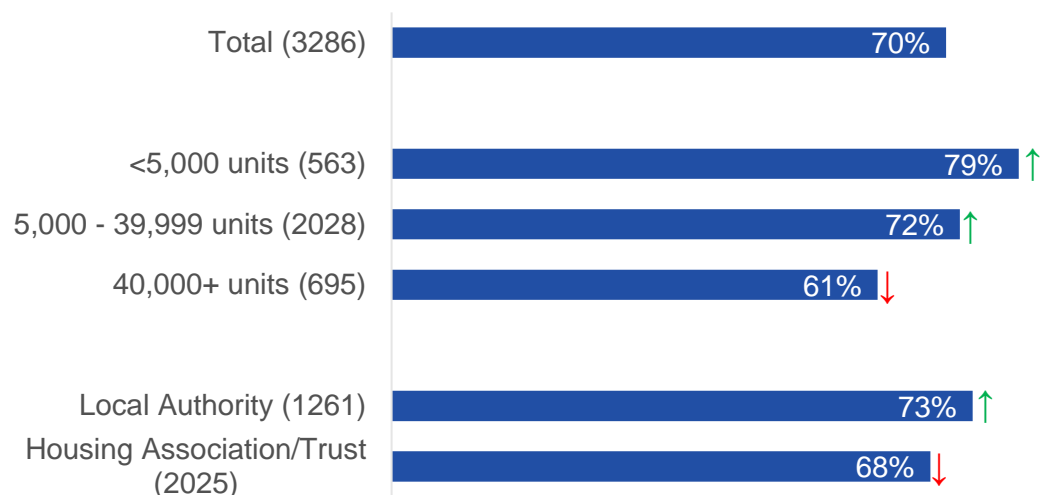
↓ Satisfaction is significantly lower than the total using a simple pairwise test

### 6.3.2 Landlord size and type

LCRA tenants whose landlord own 40,000 or more units are significantly less satisfied with ‘TP01: Overall satisfaction’ than all other tenants. In comparison, tenants whose landlord owns fewer than 5,000 units are significantly more satisfied than all other tenants.

Initial inspection suggests that local authority LCRA tenants are more satisfied with their landlord. However, regression analysis highlighted later in this section finds this is likely to be due to the other stock and tenant characteristics of this cohort (e.g. 35% of Housing Association/Trust tenants live in a property where their landlord owns 40,000 or more units, compared to 7% of Local Authority tenants).

Figure 7: Levels of satisfaction to TP01: Overall satisfaction by landlord size and type



Unweighted base sizes shown in parenthesis.

↑ Satisfaction is significantly higher than the total using a simple pairwise test

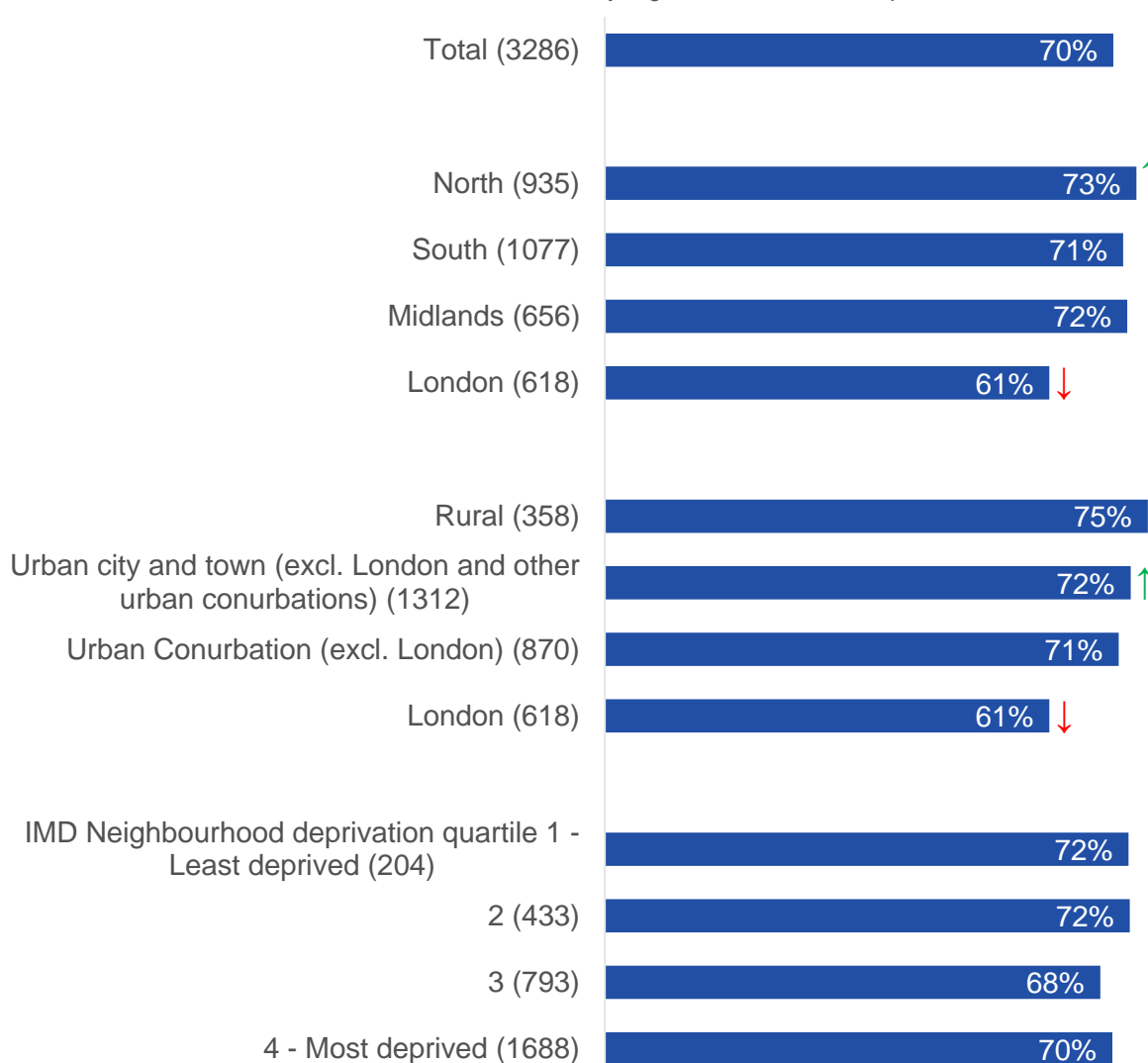
↓ Satisfaction is significantly lower than the total using a simple pairwise test

### 6.3.3 Region, urban & rural, and deprivation

When comparing levels of overall satisfaction by region we find that those living in London are significantly less satisfied than those living outside of London. When combining region with urban and rural classifications we find that tenants in London are also significantly less satisfied than tenants living in both rural areas and other urban areas. Regression analysis suggests that lower satisfaction in London is evident even after controlling for all other factors, such as tenant age, property type or neighbourhood deprivation.

There is no evidence to suggest that there is a difference in the levels of overall satisfaction by those living in neighbourhoods with different levels of deprivation (measured by the Indices of Multiple Deprivation).

Figure 8: Levels of satisfaction to TP01: Overall satisfaction by region, urban / rural & deprivation



Unweighted base sizes shown in parenthesis.

↑ Satisfaction is significantly higher than the total using a simple pairwise test

↓ Satisfaction is significantly lower than the total using a simple pairwise test

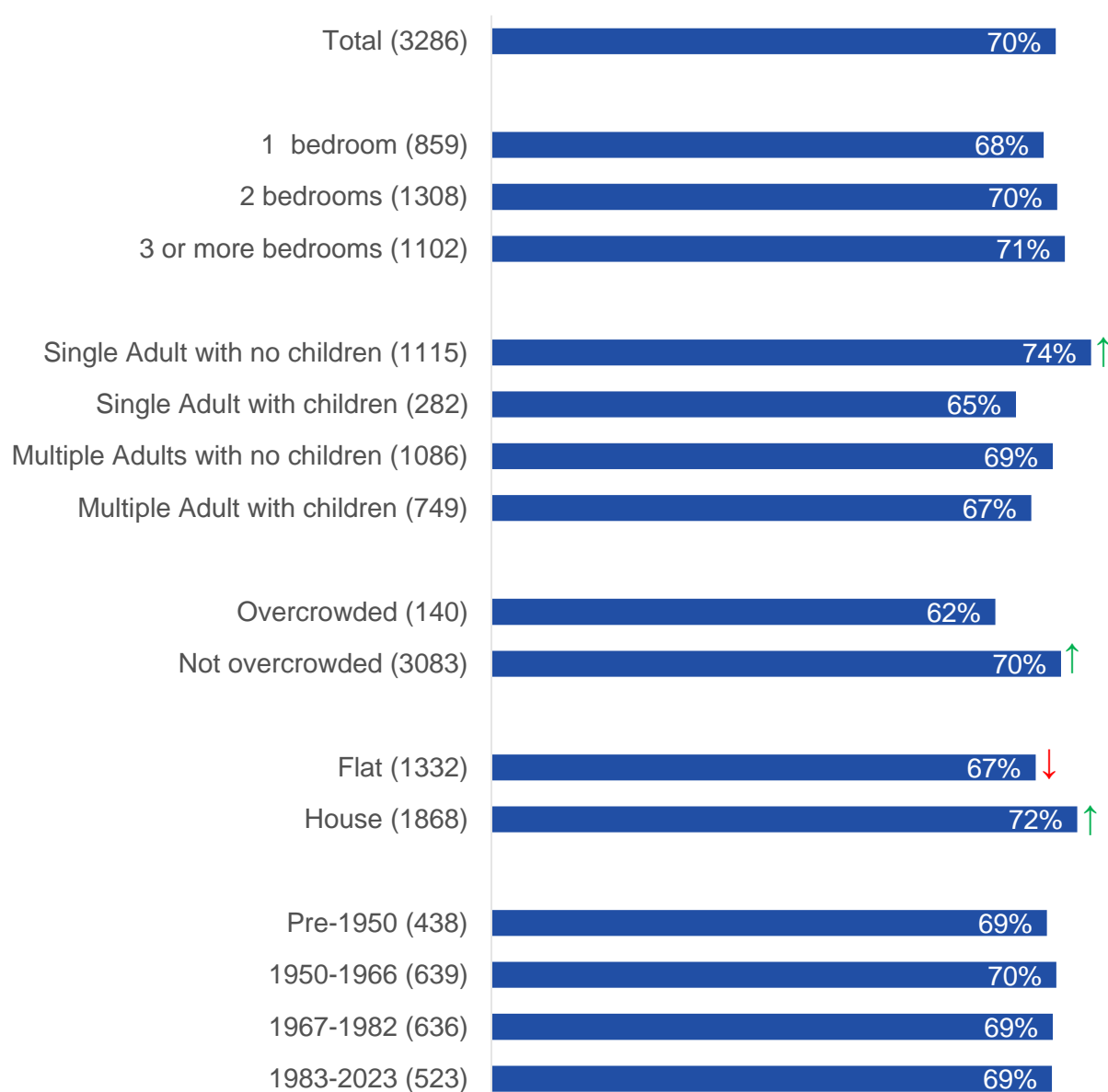
### 6.3.4 Property size, household composition, overcrowding, property type and age

There is an indication that adults who state they live alone with no children, or those who live in a house, are significantly more satisfied overall than tenants in all other households. However, regression analysis finds these are likely to be driven by the other characteristics of these cohorts.

There is also an indication that those living in a household that is not classified as overcrowded are more satisfied overall, however, further regression analysis suggests this difference may be due to other factors. This may also be due to the smaller base size amongst those who are classified as living in an overcrowded household (if the property has two or more people sharing a bedroom).

There is no evidence to suggest that there is a difference in the levels of overall satisfaction when analysing by the age of the property or the number of bedrooms tenants have within their household.

Figure 9: Levels of satisfaction to TP01: Overall satisfaction by number of bedrooms, household composition, overcrowding, property type and age



Unweighted base sizes shown in parenthesis.

↑ Satisfaction is significantly higher than the total using a simple pairwise test

↓ Satisfaction is significantly lower than the total using a simple pairwise test

### 6.3.5 Regression analysis

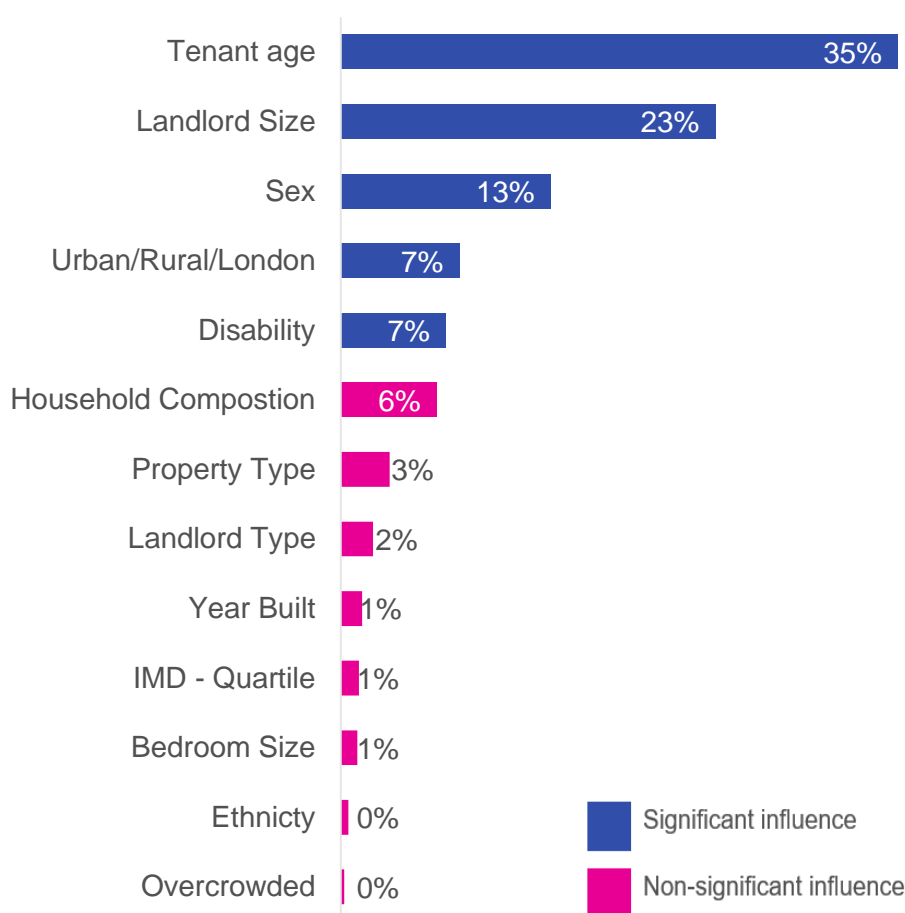
As highlighted throughout this section, when analysing levels of satisfaction by key stock and tenant characteristics we also need to recognise the relationships each characteristic may have with one another. For example, different age profiles for certain groups of tenants may account for different satisfaction by ethnicity or property type. Regression analysis allows us to independently understand the impact each stock and tenant characteristic has on the levels of overall satisfaction taking into consideration the relationship between each characteristic.

This analysis finds that a tenant’s age, their landlord’s size, their sex, whether they live in London, or whether they have a disability, all have a significant influence on their levels of overall satisfaction. Modelling suggests that, of the characteristics measured, these are the fundamental drivers of differential satisfaction. Of these, tenant age is the most important.

There is no evidence to suggest once consideration of the relationship with other characteristics is taken into account, that a tenant’s landlord type, neighbourhood deprivation levels, ethnicity, property age, property size or property type, or household composition, have an influence on their levels of overall satisfaction.

As highlighted in the previous section, when reviewing the variation in satisfaction that can be explained by this model (i.e., Nagelkerke R Squared value of 8%), we find that tenant and stock characteristics can only explain a relatively small proportion in the variation in satisfaction. This research suggests that perceptions of specific aspects of service delivery have a much larger impact on tenant satisfaction than stock and tenant characteristics.

Figure 10: Shapely regression model undertaken on TP01: Overall satisfaction by all stock and tenant characteristics (% relative importance)



Nagelkerke R Squared for broad regression model = 8%

## 6.4 Other TSM perception questions

The key findings when examining satisfaction for the other TSM perception questions by key stock and tenant characteristics are listed below.

### 6.4.1 Age

When taking into consideration the differences in satisfaction between all tenant and stock characteristics for all TSM perception questions, age has the strongest impact on a tenant's satisfaction for all TSM perception questions except for '*TP03: Satisfaction with time taken to complete most recent repair*' and '*TP09: Satisfaction with the landlord's approach to handling complaints*', where it has the second strongest impact (behind landlord size).

### 6.4.2 Landlord size

The size of a landlord has a significant influence on tenant perceptions for all TSM perception questions and has the strongest impact on '*TP03: Satisfaction with time taken to complete most recent repair*' and '*TP09: Satisfaction with the landlord's approach to handling complaints*'. For the latter, levels of satisfaction drop to 26% for tenants whose landlord owns 40,000 or more properties, significantly lower than those with fewer than 40,000 properties. Indeed, average tenant satisfaction is lower for tenants whose landlord owns 40,000 or more properties for all TSM perception questions - except for '*TP12: Satisfaction with the landlord's approach to handling anti-social behaviour*' where levels of satisfaction are only significantly lower than tenants whose landlord has fewer than 5,000 properties.

### 6.4.3 Geography

Tenants who live in London have significantly lower levels of satisfaction for TSM perception questions regarding repairs & maintenance ('*TP03: Satisfaction with time taken to complete most recent repair*', '*TP04: Satisfaction that the home is well maintained*', and '*TP05: Satisfaction that the home is safe*'), and for '*TP06: Satisfaction that the landlord listens to tenant views and acts upon them*' & '*TP08: treating tenants fairly and with respect*'.

There is no evidence to suggest there are differences in perceptions between tenants living in London or other urban and rural areas for TSM perception questions relating to complaints or neighbourhood management (TP10 to TP12).

### 6.4.4 Disability

Tenants who state they do not have a physical or mental health condition which is lasting, or expecting to last, 12 months or more, are least satisfied with communication and engagement-based TSM perception questions (TP06 – TP08), and the handling of complaints or anti-social behaviour (TP09 & TP12).

### 6.4.5 Sex

Female tenants are markedly less satisfied than male tenants for all TSM perception questions (with the exception of '*TP09: Satisfaction with the landlord's approach to handling complaints*').

## 7 Satisfaction amongst LCHO tenants

### 7.1 Key messages

In this section we explore what is driving overall satisfaction amongst shared owners (LCHO tenants) (shared owners). Key messages we find include:

- Shared owners (LCHO tenants) indicate significantly lower levels of satisfaction than LCRA tenants – half are satisfied with the service provided by their landlord (49%) and over a quarter (29%) are dissatisfied (TP01).
- Shared owners typically have more limited interaction with their landlord, and lower satisfaction is partly accounted for by ‘neither satisfied nor dissatisfied’ being a more prevalent response than for LCRA tenants.
- The majority of shared owners are satisfied with ‘*TP05: Satisfaction that the home is safe*’ (74%) and ‘*TP08: Agreement that the landlord treats tenants fairly and with respect*’ (61%). However, shared owner satisfaction is lower across TSM measures compared to LCRA tenants. In particular, levels of satisfaction for ‘*TP06: Satisfaction that the landlord listens to tenant views and acts upon them*’ (44%) and ‘*TP09: Satisfaction with the landlord’s approach to handling complaints*’ (24%) are relatively low.
- Where shared owners are dissatisfied, stated reasons include rent or service charges (38%), repairs issues (33%), and general customer service (26%). Some of the responses appeared to reflect perceptions over the value of money provided by shared ownership in general – however, many shared owners cite specific issues with communal repairs, safety checks or other services for which their landlord is responsible.

## 7.2 Drivers of TP01: Overall satisfaction

### 7.2.1 What impacts overall satisfaction: tenant feedback

Around half of shared owners are satisfied overall (49%). Where tenants were satisfied, they were asked to explain why through an open question. The main reasons cited were related to positive customer service (21%), or not experiencing any issues (18%).

*“If I have had any reason to ring them, they have always been helpful.”*

*“I don’t have any issues, but don’t have much contact with them.”*

*“I have never contacted them or needed them, to come out for anything. It’s limited contact.”*

Table 6: Reasons for satisfaction TP01: Overall satisfaction. Coded responses to ‘Why are you satisfied with the service provided by your landlord?’ (Amongst LCHO)

<b>Unweighted base of those satisfied at ‘TP01: Overall satisfaction’</b>		<b>197</b>
<b>Summary: Any customer service</b>		<b>21%</b>
	Good customer service	12%
	Issues/queries dealt with quickly /efficiently	5%
	Good communication/easy to contact/kept informed	4%
	Deal with issues/sort out queries	1%
<b>No problems/issues</b>		<b>18%</b>
<b>Generally happy/satisfied</b>		<b>13%</b>
<b>Affordable rent</b>		<b>4%</b>
<b>Summary: Any repairs or maintenance</b>		<b>3%</b>
	Repairs dealt with quickly/promptly/efficiently	3%
	Good quality of work	1%
<b>Summary: Any quality/safety of home</b>		<b>3%</b>
	Good quality/condition of home/property	2%
	Feeling safe in home	1%
<b>Area is kept clean</b>		<b>1%</b>
<b>Other</b>		<b>3%</b>
<b>Don’t know</b>		<b>14%</b>



## 7.2.2 What impacts overall dissatisfaction: tenant feedback

Shared owners who were dissatisfied were asked what they were thinking about when answering ‘TP01: Overall satisfaction’. Dissatisfaction for shared owners focuses on issues with rent or service charges (38%) and also includes repairs (33%), which includes outstanding repairs (20%), and slow or poor responses to repairs (13%), and customer service (26%). Some of the responses appeared to reflect perceptions over the value of money provided under the shared ownership model – for example, shared owners cite that they pay rent without the repairs service received by other tenants. However, many shared owners cite specific issues with repairs and other services which landlords provide to them (e.g. maintenance of communal areas).

*“Failure to carry out necessary maintenance on grounds, buildings etc. Lack of communication and representation, no consultation about trades and companies used for gardening, window cleaning, tree cutting etc.”*

*“We own half and they own half, but we have to deal with the repairs. An example would be, when I had a brick wall in my back garden and it was wobbly and had to be taken down. I asked if we could go half’s on it, and they pay half and I pay half, but no I had to pay the whole of it. It is the same with if the boiler went I would have to pay for the whole of the boiler repairs.”*

*“They don’t do anything, it is all our responsibility even though we pay rent on 60% of the property, and the full tenants across the road pay less rent than me.”*

*“Service charge is not clear what we pay for and why does it increase so much each year.”*

Table 7: TP01A. Why are you dissatisfied with the service provided by your landlord? (Amongst LCHO)

<b>Unweighted base of those dissatisfied at ‘TP01: Overall satisfaction’</b>		<b>108</b>
<b>Rent and service charges</b>		38%
<b>Summary: Any repairs or maintenance</b>		33%
	Outstanding repairs	20%
	Slow/poor responses to repairs	13%
	Poor quality workmanship	1%
<b>Summary: Any customer service</b>		26%
	Poor customer service/rude/not listening to resident	14%
	Poor communication	13%
<b>Summary: Any other maintenance</b>		11%
	Communal maintenance	8%
	Greenery maintenance	6%
<b>Not looking after vulnerable tenants</b>		6%
<b>Summary: Any property maintenance</b>		4%
	Property maintenance	2%
	Poor quality/condition of home	2%
<b>Not dealing with problem neighbours</b>		3%
<b>Outstanding complaints</b>		1%
<b>Other</b>		3%
<b>Don’t know</b>		2%

### 7.3 Feeling safe in the home

74% of shared owners are satisfied that their landlord provides a home that is safe and these tenants were asked why they feel this way. Those who were satisfied suggested they generally felt safe (16%) or didn't have any issues (12%). However, of the 12% who were dissatisfied, they gave more information on their reasons, with repairs coming out highest (44%) followed by issues with building security (28%).

*“Because we had a fire risk assessment, I was told that someone would come to realign the fire doors in my apartment, and that they would do remedial work to fit a fire barrier in the ducting between my apartment and the one above. This was more than 18 months ago, no one has done anything.”*

*“Things need mending but being Shared Ownership we have to try and fix it all. Not fair when they still own most of it! And rent is very high!”*

### 7.4 Complaint handling

A quarter (26%) of LCHO tenants state that they have made a complaint to their landlord in the last 12 months. When asked the nature of their complaint, two fifths suggested it was around the property maintenance (39%), this mainly related to not undertaking repairs and maintenance or taking too long, as well as damp and mould. Other causes of complaints were customer service (14%) and anti-social behaviour (10%).

*“Damage caused to my flat from an external source, that the landlord does not want to take responsibility for, or remedy.”*

*“It was the construction of the balconies and guttering. This has caused leaks and mould, in the flat.”*

*“They are trying to say we owe them money but we have never missed a payment. A year on I am still waiting for the reason we owe money.”*

When LCHO tenants were asked how complaints could be improved, customer service (62%) was key, a similar finding to LCRA tenants, particularly resolving issues (34%) and quicker response times (13%).

*“They could have been speedier and provided more assurance that things would actually change after the complaint, they didn't!”*

*“Be a little more compassionate and not so robotic. Don't rigidly follow process and perhaps make decisions on a case by case basis.”*

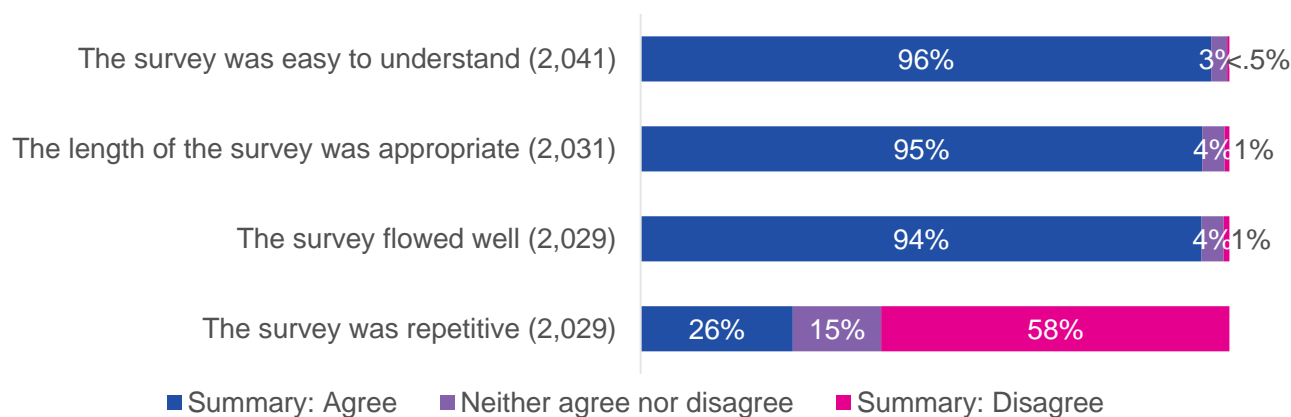
*“I would have preferred if they acknowledged that they gave the wrong information, and to have repaired the wall. I also had my local MP involved and she said that there are around 30 half rent and half buy houses that have lots of complaints.”*

## 8 Survey collection: feedback and impact of collection method

### 8.1 Tenant feedback on survey questions

NTS participants were asked to feed back on the clarity of the survey questions, the overall flow of the survey, its length, and whether it felt repetitive, nearly all agreed that the questions were easy to understand, the survey flowed well, and the length was appropriate. Almost a quarter felt the survey was repetitive. It is important to note that, in addition to TSM perception questions, the survey also included open-ended questions to gather further insights into experiences and satisfaction, as well as demographic questions.

Figure 11: With regards to the survey, how do you agree or disagree with the following statements...



Unweighted base sizes shown in parentheses. Valid responses – don't know removed.

### 8.2 Survey collection method

When analysing levels of overall satisfaction by survey collection method amongst LCRA tenants we find those who responded using a telephone method of data collection reported higher average satisfaction (77%) than those who responded using an online method of data collection (68%). This type of finding usually relates to the positive interviewer bias that is present during telephone interviews. However, caution must be used when interpreting differences in satisfaction by survey collection method seen in the NTS. The context to NTS surveys is slightly different to landlords contacting tenants directly using these methods, and is likely to mean, for example, that the observed relationship between average satisfaction and survey collection method may be slightly different in the NTS.

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