This survey was undertaken with support from the Welsh Government.

Views expressed in this report are those of the researcher and not necessarily those of CHC and the Welsh Government.
Executive Summary

1. The main aim of the Sector Wide Survey was to pilot an all Wales survey with residents only, which would support the housing sector and Welsh Government. This would enable the Welsh Government Regulator to have a clearer understanding and assurance that Housing Associations are delivering outcomes for its tenants and service users. The following pages detail a summary extract of the key research findings.

2. The survey involved a mixed method approach (postal, telephone and online), with the postal surveys as the key methodology.

3. The survey overall is extremely robust and statistically reliable based on the number of returns/completions received. A total of 6,017 surveys were completed, from a total of 41,447 randomly selected Housing Association residents, resulting in a 15% response rate from residents and +/-1.2% confidence interval.

Demographic Breakdown

Mixed age groups but few under 35

4. The age range of the main residents was typically in the mid to older age range with around a third aged 35 to 54 years (32%) and 65 or over (36%), a fifth aged 55 to 64 (21%) but relatively few under 35 (10%).

5. The average age of main residents was 58 and six in ten were female (61%). Where a partner was indicated, just over half were male (53%) and the average age was 67 years.

Many have long term health problems

6. Nearly two fifths (39%) of residents (or any member of their household), do not have any long term health problems that limit their day to day activities.

7. However, six in ten (61%) say that they or someone within their household are either limited a lot (34%) or a little (27%) with long term health issues that affect their day to day activities.

HouseMark’s Core Questions

Most are satisfied with their Landlord

8. In terms of the satisfaction levels, residents are either very or fairly satisfied with their landlord and their home.

9. ‘The service provided by your landlord’, ‘the overall quality of your home’, ‘your neighbourhood as a place to live’, and ‘that your rent provides value for money’, have the highest combined proportions of 81% or more stating very or fairly satisfied. The highest levels are for residents from small stock housing associations and the lowest for large Housing Associations.

10. The areas of least satisfaction are on the extent to which landlords listen to residents’ views and act upon them (69% satisfied, 17% dissatisfied), as well as dealing with repairs/maintenance (77% satisfied, 16% dissatisfied).
Key Priorities

Key priorities are quality of the home, keeping informed and works and repairs

11. 83% of residents were very or fairly satisfied with the overall quality of their home, and this was also the greatest first choice priority (53%). Other key priorities include keeping residents informed (39%), improvement work (37%), responsive repairs (33%) and dealing with anti-social behaviour (33%).

Perceptions of Landlord

Landlords are generally positively perceived, but there are some areas to work on

12. Most residents suggest that their Landlord’s staff are ‘friendly and approachable’ (87%) and 80% say the service provided meets their expectations.

13. There is a slightly lower level of satisfaction with issues affecting the relationship between residents and landlords with 78% saying they can trust their landlord, 79% who feel residents are treated fairly but only 68% agree that their landlord understands and responds to their circumstances and needs. Similarly, 73% say that their landlord is accountable to and open with its tenants. Ratings are highest for small Housing Associations and traditional Housing Associations and lowest for LSVT and large stock Housing Associations. This suggests that developing the relationship and communications with residents will be an important area of action, particularly in large Housing Associations and LSVTs.

A number of residents are satisfied with the accessible services and voicing their opinions

14. Almost four fifths feel fairly or very satisfied that their landlord ‘Makes it easy for people to understand the services it delivers and how to access those services’ (78%) and ‘Gives you the opportunity to make your views known’ (78%).

Majority are proud of their home and feel safe, but issues with transparency

15. The majority of residents are proud of their home (85%), feel safe there (85%) and say that their landlord is open and fair with the information they publish (83%). A lower proportion are satisfied that the landlord is open about what it does (76%) although 15% are unsure. This ties in with perceptions of trust and communication already mentioned above.

Advice and Support

Most residents are satisfied with the rent or income advice and support

16. 71% of residents are satisfied that their landlord provides them with advice and support when ‘Managing your finances and paying rent and service charges’, and a similar proportion are satisfied with the assistance provided when ‘Claiming housing and other welfare benefits’ (70%).

17. Although most residents are satisfied with their landlord’s advice and support, around a quarter of residents (23% and 25% respectively) appear to be unsure on whether they are satisfied or dissatisfied with the advice and support.
Recent movers are generally satisfied

18. 85% of recent movers are very or fairly satisfied with ‘The explanation of the rights you have as a tenant’ and similarly with ‘Ease of understanding and access to allocations scheme’ (86%).

19. The results show some dissatisfaction with the condition of their home, for instance, almost a fifth of residents (19%) are very or fairly dissatisfied with ‘The condition of the property when you moved in’ and nearly a tenth (8%) are dissatisfied with ‘the quality of internal/external design’ of new builds.

Contact and Communication

Many but not all find it easy to get hold of the right person

20. Over two thirds of residents (70%) found it easy to get hold of the right person, a sixth found it difficult (15%) and a similar proportion at 14% were unsure. Although 15% of residents found it difficult to get through to the correct person, 6% found the staff helpful.

Most are satisfied that their query was solved quickly

21. Over three quarters of residents (78%) were satisfied ‘That staff dealt with your query quickly and efficiently’ but just under seven in ten (69%) were satisfied with ‘The final outcome of your query’.

22. 90% of residents are very or fairly satisfied with their language arrangements.

Low internet usage

23. Just under six in ten residents (57%) use the internet either at home or outside of the home. Over two fifths of residents (43%) do not use the internet.

Neighbourhood

Many see no change in their neighbourhoods

24. 43% of residents see neither an improvement nor decline in their neighbourhood in the last three years.

25. Whilst almost a quarter of residents (23%) felt their neighbourhood has declined or greatly declined, only a third felt it has improved (34%). This points to the need for further development of neighbourhoods.

Parking, dog mess and litter are some of the major problems

26. Around two thirds of residents that took part in the survey mentioned one or more problems in their neighbourhood, these are based on combining those that said they had a major or minor problem, the key issues were:

- 56% Car parking (32% major problem/ 24% minor problem)
- 59% Rubbish/ litter (26% major problem/ 33% minor problem)
- 53% Dog fouling/ dog mess (26% a major problem/ 27% minor problem)
Independent Living

**Most are satisfied with adaptations made to their home**

27. Over three quarters of residents (76%) have not had any adaptations undertaken to their home in the past two years, and just under a quarter (24%) have had work carried out.

28. Where work has been done, most residents are satisfied with the level of work carried out; with over four fifths having indicated they are very or fairly satisfied with each aspect stated above.

**Adaptation work has had a significant impact on quality of life**

29. 91% of residents have indicated the amount of work made to their homes has had a positive impact on the quality of their life. This has originated from 69% of residents stating the extent of work on their home has made a significant difference to their quality of life, and 22% have stated the work has made a minor difference.

30. The 87% that do not receive any independent living support, 79% confirmed they do not need this support, however, 6% have stated they need assistance but do not receive it (excluding any ‘not answered’ responses).

Repairs

**Most satisfied with repairs service, but some issues for action**

31. Two thirds of residents (65%) say they had repairs made to their home in the last 12 months. There is general satisfaction with many aspects of repairs such as the attitude of workers (91%), keeping dirt and mess to a minimum (88%) and the overall quality of work (84%).

32. However, there are issues with some aspects of the repairs service. The highest proportion of dissatisfaction amongst residents was on ‘The repair being done right first time’ (18%) and ‘Time taken before work started’ (19%). Although residents are happy with the work carried out, they felt that the time taken and initial phase of work took longer than anticipated.

Anti-Social Behaviour

33. Handling of anti-social behaviour remains one of the most important priorities to residents.

**Many find it easy or very easy to report anti-social behaviour, but not all**

34. Of those that had reported anti-social behaviour, over two thirds found it easy or very easy to report it at 70%. There are many issues with how anti-social behaviour complaints are handled and the communications involved, however.
Complaints

36. Just under two thirds of residents (65%) are aware that their landlord has a complaints procedure in place with the remainder unaware.

**Strong level of dissatisfaction with the outcome of complaints**

37. General complaints have a high proportion of negative satisfaction ratings, as more residents appear to be very or fairly dissatisfied with the final outcome (46%) than are satisfied (38%).

38. Almost half (46%) are satisfied to some degree with the way their complaint was handled but nearly two fifths (38%) are dissatisfied.

Estate Services

**Most are satisfied with the grounds maintenance**

39. A high proportion of residents (72%) were satisfied with the grounds maintenance, such as grass cutting, undertaken by their landlord. However, under a fifth (17%) are either very or fairly dissatisfied with the maintenance of the grounds.

Housing for Older People

**Majority are satisfied with services provided**

40. With fairly low levels of dissatisfaction, housing for older people residents are mainly very or fairly satisfied with the services they receive from their landlord. They are satisfied with how easy it is to access all areas of their home and scheme (91%) and are also satisfied with the safety and security of their home (90%).

Leaseholders

**Mixed views with services provided**

41. Just under 100 leaseholders have mixed views on the level of service received from their landlords, and only around half stated they are very or fairly satisfied with the repairs and maintenance to their communal areas and external buildings.

Shared Owners

**Clearer explanation of service charges**

42. Based on the small number of shared owners that responded to the survey most appear to be satisfied with the level of service received. They would like to see better communication, a clearer statement and more helpful explanation of how service charges are calculated.
Supported Housing

**Majority of residents are satisfied with the service received**

43. Most residents in supported housing gave a positive rating of the level of service provided to them, particularly on the safety and security of their home (95%).

**Other Comments**

**Positive categories**
- Excellent service
- Helpful/ supportive staff
- Very happy with my home
- Very happy with repairs/ upgrades/ adaptations
- Very happy with the neighbourhood/ area

**Negative categories:**
- Contract work not up to standard
- Poor grounds maintenance
- Poor exterior maintenance
- Don't receive window cleaning/ maintenance service we pay for
- Problems of drugs/ crime drunkenness/ anti-social behaviour