



## 2. Executive summary

Bench mark	2019 result	Change over time	2023 result	Tenant Satisfaction Measure
72%	85%	↓	81%	satisfaction overall
72%	90%	↓	82%	home is safe
67%	N.A.		72%	home is well maintained
58%	N.A.		59%	communal areas clean and maintained
70%	N.A.		88%	repairs service in last 12 months
65%	N.A.		85%	time taken to complete last repair
57%	82%	↓	65%	listens to views and acts on them
61%	81%	↓	76%	being kept informed
72%	85%	↔	85%	treated fairly and with respect
33%	N.A.		47%	approach to handling complaints
58%	N.A.		48%	makes a positive contribution to area
52%	65%	↓	54%	approach to handling ASB

statistically significant improvement  
 no statistically significant change  
 statistically significant decline

## 2. Executive summary

### Overall satisfaction

1. Overall tenant satisfaction with the services provided by SHAL has fallen to 81% compared to the 85% achieved in 2019. However, this isn't a statistically significant change and is consistent with sector wide trends as customer satisfaction scores have been significantly impacted by the pandemic, cost of living crisis, inflationary rent increases and shortages in labour and materials.
2. SHAL's overall satisfaction score is nonetheless considerably higher the ARP Research benchmark median of TSM questions (72%). Notably, amongst clients that have completed TSM regulatory surveys this year the average drop in satisfaction is 8% (section 3).
3. Most of the results across the survey are also generally above the average benchmark scores, with particularly high repairs satisfaction scores.
4. A 'key driver' analysis is a statistical test to check which other results in the survey are best at predicting overall satisfaction. In descending order of strength, there are only two factors most closely associated with overall tenant satisfaction which are:
  - Treats tenants fairly and with respect (85% satisfied, section 6)
  - Repairs and maintenance overall (74%, section 5)

### Improvement priorities

5. Survey respondents were able to rate a list of fourteen possible service improvements in terms of which would be the most important to them. This uses the 'Priority Search' methodology, which ensures that the rankings are a true reflection of the importance of all the items on the list relative to one another. The top six for the sample as a whole are:
  - i. Invest in maintaining and improving the standard of homes
  - ii. Invest in improving the energy efficiency of our homes
  - iii. Support people who are struggling financially
  - iv. Do more to help people with disabilities get the support they need
  - v. Support people who want to maintain and improve their homes themselves
  - vi. Help people improve their mental health and wellbeing (section 11).

### The home

6. Investment in maintain and improving the standard of homes is the top priority for tenants, and property maintenance is the main theme of the survey results.
7. Just under three quarters of tenants feel that SHAL provides a home that is well maintained, which is above the current ARP benchmark average (72% v 67%, section 4).
8. Satisfaction with the quality of the home fell significantly from 84% to 80% since the last survey, but this is normal post-pandemic.
9. Satisfaction with the safety of the home is well above the ARP benchmark target (82% v 72%), although it has fallen by a significant margin since last year. This is common across the country, in part due to national media reporting.
10. Only just over half of respondents with communal areas are satisfied with how they are cleaned and maintained (59%), although this is on par with other landlords.

## 2. Executive summary

### Repairs

11. Overall repairs and maintenance rating has fallen by 5% since the last survey (now 74%), although this isn't quite enough to pass the threshold for statistical significance. Nevertheless, it is the lowest score for this rating since the first STAR survey in 2012 (section 5).
12. However, satisfaction with repairs services received in the last 12 months is far higher (88% satisfied), as is the completion time for those repairs (85% satisfied).
13. These two scores are around twenty points higher than average across ARP Research's other clients. This means that whilst property maintenance remains an important issue for tenants, the service provided once an appointment is made is very well regarded.

### Communication

14. The single best predictor of satisfaction with SHAL overall is the rating for treating tenants fairly and with respect.
15. The fact that an unchanged 85% of tenants do feel that they are treated fairly and respectfully indicates that this is a positive relationship this is one of SHAL's strengths relative to other landlords (benchmark 72%, section 6).
16. Conversely, the largest fall in satisfaction throughout the results is whether SHAL listens to tenants' views and acts upon them. This rating has gone down by 18% to 65%, which is 10% lower than the previous worst results in 2012. However, this is mainly because more respondents gave an ambivalent, relatively few being actively dissatisfied (10%).
17. Experience of other similar surveys suggest this change is due to property maintenance issues, as the steady fall in satisfaction with being kept informed (76% satisfied).
18. One interesting feature of this score is that unlike most other rating statements, the score gets progressively lower as the respondents get older. Furthermore, it is interesting that tenants who aren't digitally active are more likely than others to prioritise better information about SHAL's services.

### Customer service

19. Being easy to deal with, known as a customer effort score, is a recently added core STAR question. It is very positive to see that 82% of the sample are satisfied this is the case, compared to just 5% that are dissatisfied. This score is 6% higher than the ARP benchmark median (section 7).
20. There has been virtually no change on the ability of staff to deal with the last query, or the level of satisfaction with the final outcome, both being rated very positively (86% and 79% respectively).
21. However, the proportion of respondents that believe SHAL has friendly and approachable staff has fallen by a statistically significant 11% since last year, albeit still remaining at the very high level of 81%. This may be a consequence of how SHAL had to change its customer service offering over the course of the pandemic.
22. Nine out of ten respondents are digitally active, and the proportion that want to have contact with SHAL over email has almost doubled to 61%.

### Neighbourhoods

23. Respondents were asked to specifically rate whether they think their landlord makes a positive contribution to their neighbourhood, something 48% of respondents are satisfied with, compared to 5% that are dissatisfied (section 9).
24. Of all the TSM questions in the survey it compares the least favourably against the benchmark to the extent that it is in the bottom quartile of ARP's recent clients. However, a large proportion ticked the middle point in the scale, and amongst these tenants there is simply a lack of knowledge and/or few other SHAL properties in their area.
25. Just over half of the sample are satisfied with the approach to handling anti-social behaviour (54%), compared to 11% that are dissatisfied. The satisfaction level is on par with the benchmark average.

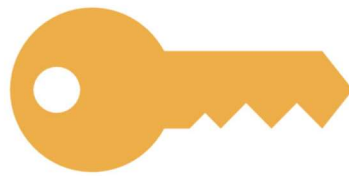
### Money matters

26. Satisfaction with rent value for money value for money has fallen significantly from 92% to 82%, but that is normal in the face of the cost-of-living crisis (section 10).
27. Most tenants feel that SHAL handled the rent increases as well as it could (76%).
28. A fifth of SHAL's customers finding it difficult to manage financially at the moment (21%), including over a third (35%) that are feel they are unable to heat their homes during the colder months which is double the proportion who felt that way in 2019.
29. Support for people who a struggling financially is the third highest future priority, and the top priority for the under 35s (section 11).



### 3. Services overall

**81%**  
satisfied  
overall



top 'key  
drivers'

1. treats tenants fairly & with respect
2. repairs and maintenance overall



Overall satisfaction has fallen since 2019, but cost-of-living has suppressed satisfaction scores across the sector



Most satisfaction scores are well above the TSM benchmarks from other ARP Research clients



SHAL receives a high score from tenants on the best predictor of overall satisfaction - treating tenants fairly and with respect



The main theme of both the satisfaction and priority results is property maintenance



## 4. The home

82%  
▼



safe

72%  
▼



well maintained



Satisfaction with the quality of the home fell significantly since the last survey, but this is normal post-pandemic



Investment in maintain and improving the standard of homes is the top priority for tenants



Satisfaction with safety has fallen, but this is also common amongst other landlords and may be influenced by national media



Two thirds of tenants think theirs is a Home for Life. Amongst those who don't, 1 in 5 aren't happy with maintenance



## 5. Repairs service

88%



service in last  
12 months

85%



time taken to  
complete repair



Satisfaction with repairs and maintenance overall has fallen, but not by a statistically significant amount



That question is one of only two key drivers of satisfaction with SHAL overall

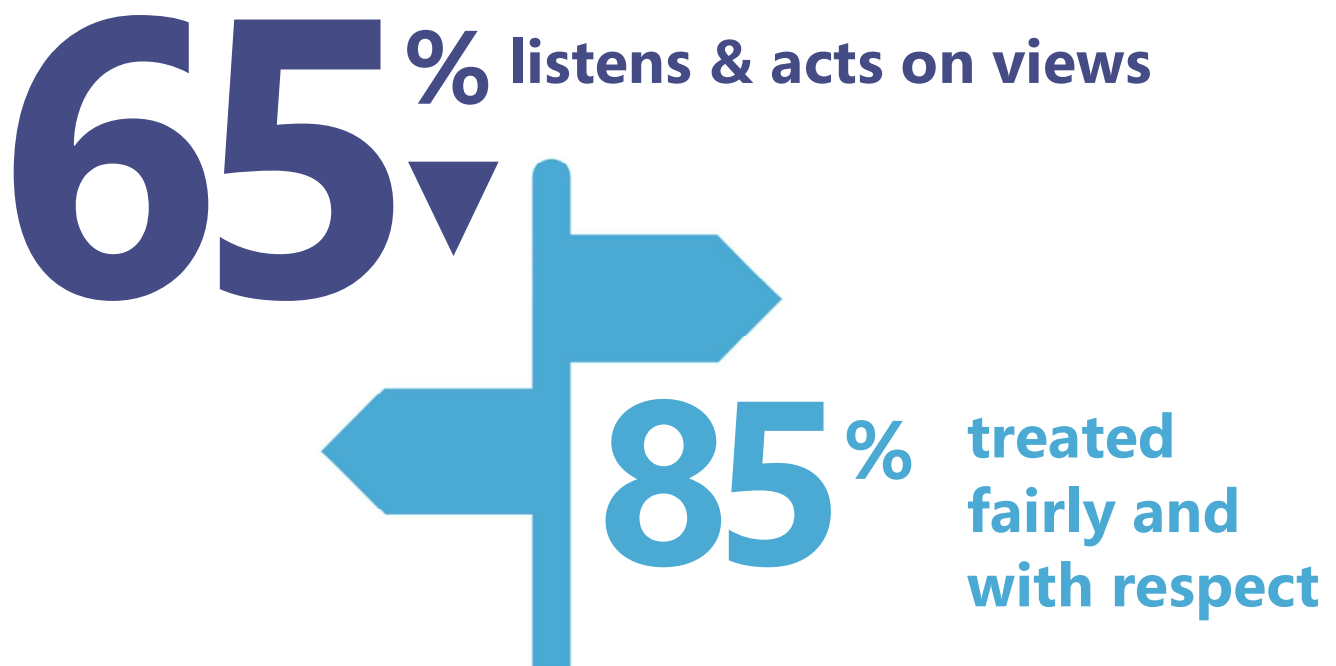


However, satisfaction with recently completed repairs is very high and in the first quartile of ARP Research clients

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## 6. Communication



Being treated fairly and with respect is the strongest key driver of satisfaction overall



An unchanged proportion of tenants are satisfied in this regard, which is well above the benchmark of 72%



However, there is a significant 18% fall in the proportion that feel that they are listened to



Satisfaction with information has also been steadily falling, especially amongst older tenants and/or those that don't read Grapevine





## 7. Customer service



82%



easy to deal with  
(customer effort)



Satisfaction with the handling and final outcome of the last query is unchanged since 2019



However, post-pandemic, fewer now feel that staff are friendly and approachable



Nine out of ten respondents are digitally active, and the proportion that want to have contact with SHAL over email has almost doubled to 61%



## 8. Complaints

47%



complaints handling

19%



said they complained



Be aware that only 1 in 17 respondents that claim to have made a complaint have used the formal complaints system

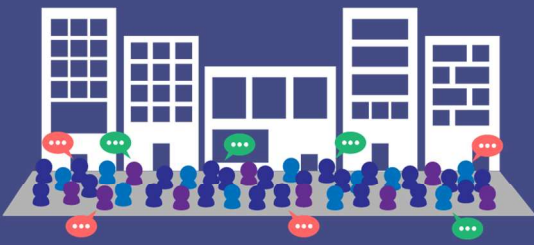


Satisfaction with how it is handled is above the benchmark of 33%



Satisfaction that support and advice provided to tenants when things go wrong has fallen significantly since 2019

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## 9. Neighbourhood and community

**48** % a positive contribution to the neighbourhood



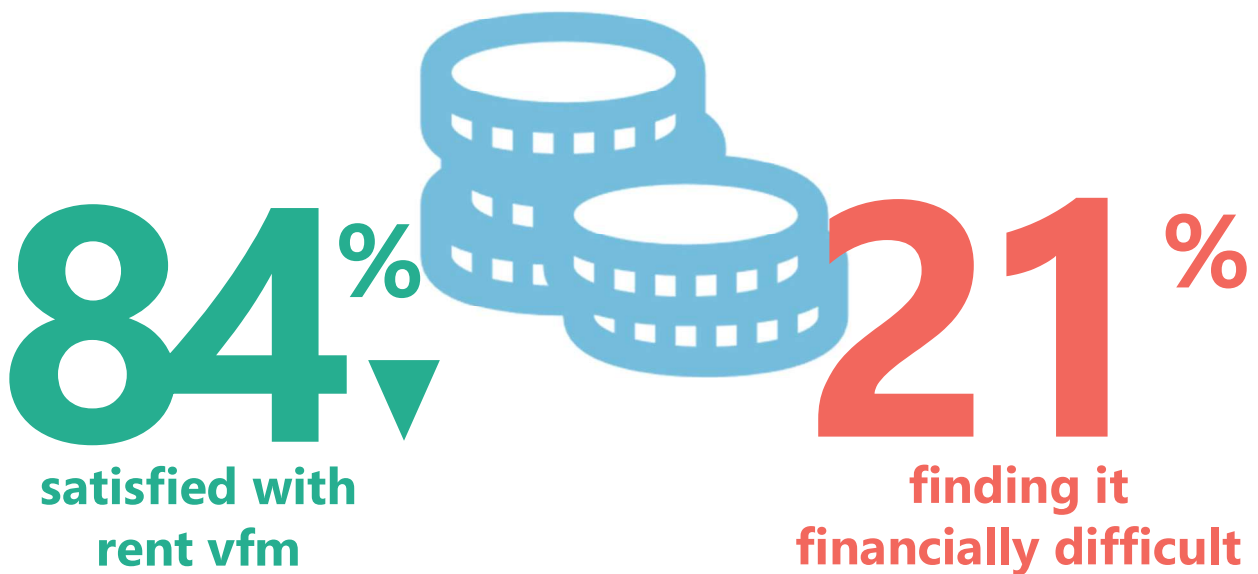
approach to handling ASB

**54** %

- 
- B** The extent to which SHAL makes a positive contribution to neighbourhoods compares poorly against other landlords
  - ?** However, this is because many said they just didn't know, or that they are only a few SHAL properties in their area
  -  Satisfaction with how ASB is handled has fallen, but not significantly. It is still on par with other landlords
-



## 10. Money matters



Satisfaction with value for money has fallen significantly, but that is normal in the face of the cost-of-living crisis



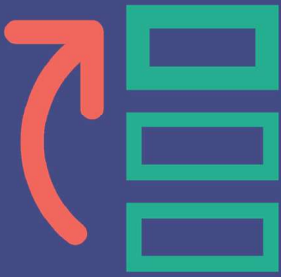
Most tenants feel that SHAL handled the rent increases as well as it could (76%)



A third of tenants find it difficult to heat their homes, which is double the figure in 2019



Support for people who are struggling financially is the third highest future priority, and the top priority for the under 35s



## 11. Priorities for improvement

1

invest in maintaining and improving the standard of our homes

2

invest in improving the energy efficiency of our homes

3

support people who are struggling financially



The priority list is broadly similar to how it appeared in 2019



Support for people who are struggling financially (3rd) is the biggest change, although wording has changed



This support is an even higher priority for the youngest tenants



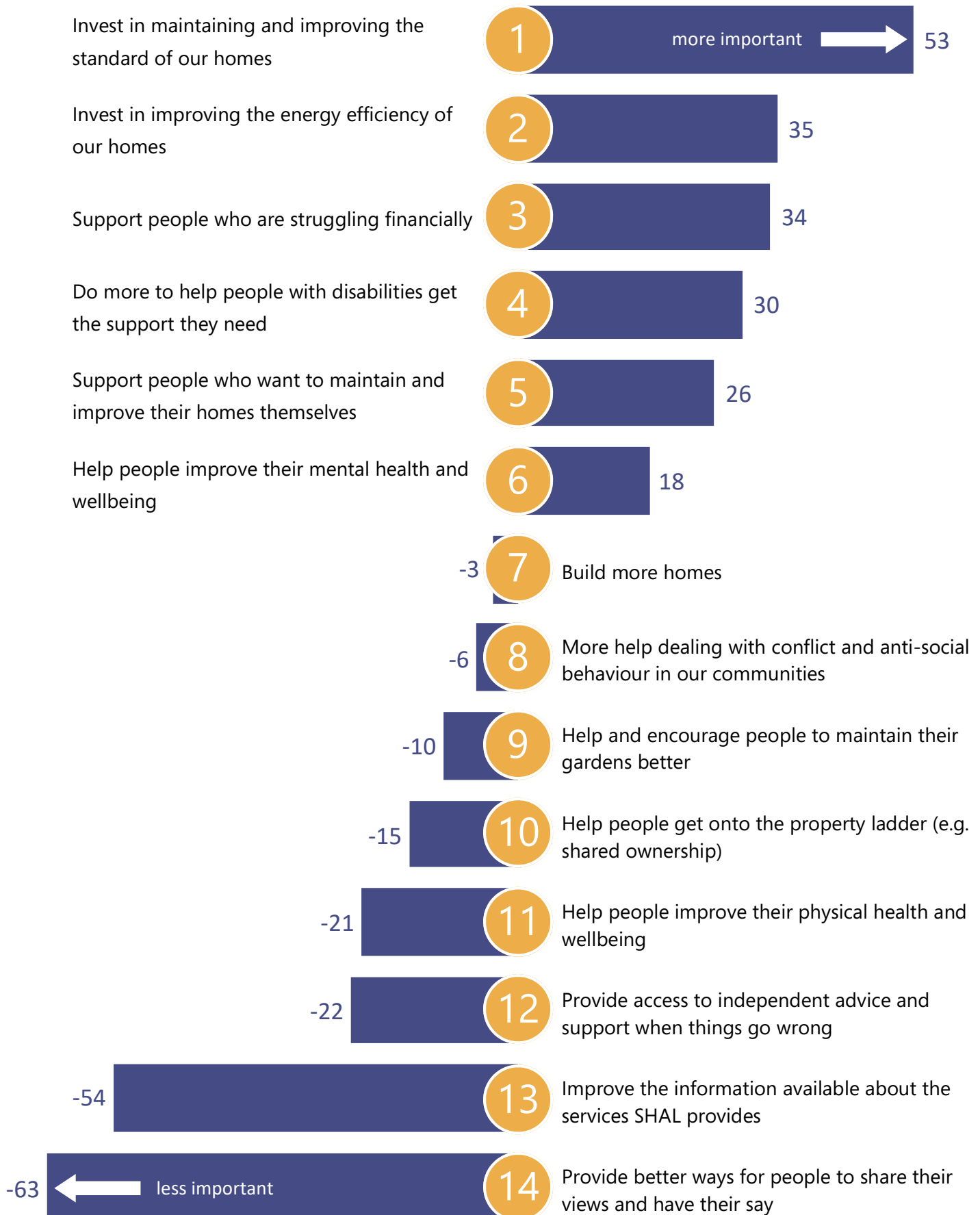
Younger tenants also prioritise support with mental health and wellbeing



Support for people with disabilities is a consistently strong priority (4th) across the survey sample

# 11. Priorities for improvement

## 11.1 Which of the following improvements would be the **most important** for you?



Weighted figures calculated by subtracting % who placed an item in the bottom third of the list from the % who placed it in the top third. Least significant difference at the 95% confidence level = 8.8 | Base 233