
Carmarthenshire County Council STAR Survey

2024 Report

February 2024

Prepared by: Acuity Research & Practice

acuity
making sense of housing



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Introduction

Carmarthenshire County Council owns around 9,000 homes in south-west Wales.

In 2023/24, they commissioned Acuity to undertake an independent satisfaction (STAR) surveys of their tenants to collect data on their opinions of, and attitudes towards, their landlord and the services provided. This survey will be undertaken annually and will run until at least 2029/30.

The survey was designed following Housemark and Welsh Government guidelines in conducting a Standardised Tenant and Resident Satisfaction (STAR) survey.

The aim of this survey is to provide data on tenants' satisfaction, which will allow Carmarthenshire County Council to:

- Provide an up-to-date picture of tenants' perceptions of their homes and the current services
- Compare the results with previous surveys where possible
- Compare the results with other landlords where appropriate
- Inform decisions regarding future service development
- Publish results to residents, as per Welsh Government requirements

The survey was undertaken throughout the period from November 2023 to February 2024, and used a postal and online methodology. In November 2023, a randomly selected sample of 5,000 tenants were sent a postal questionnaire to their address. A reminder mailout was then sent out early January 2024 to all non-respondents. Running concurrently alongside this, an online survey campaign was also undertaken. For the same sample, tenants with an email address and mobile number were sent online survey links (plus reminders to non-respondents at different stages) via email and/or SMS, providing them with another opportunity to participate in the survey. The questionnaire was produced in both English and Welsh to give tenants the option to respond in either language. An incentive was also used to boost participation, whereby all tenants who completed the survey were entered into a prize draw to win one of five £100 shopping vouchers.

By the close of the fieldwork period in early February 2024, 1,250 responses had been received, equating to a 25% response rate – or, 14% of the total tenant population. Of these, 370 responses were received online and 880 by post. The responses were checked against the original details of tenure, area and age to ensure the responses were representative of the tenant population as a whole. Following this exercise, it was found that some age groups were either slightly over- or under-represented in the sample response, therefore weighting has been applied on age to make the results representative.

For the overall results, Acuity, Housemark and the Welsh Government recommend that landlords with under 10,000 properties achieve a sampling error of at least $\pm 4\%$ at the 95% confidence level. For Carmarthenshire County Council, 1,250 responses were received, and this response is high enough to conclude that the findings are accurate to within $\pm 2.57\%$, so well within the required margin of error.

The survey was confidential, and the results were sent back to Carmarthenshire County Council anonymised unless tenants gave their permission to be identified – 63% of tenants did give permission to share their name and 88% of these tenants were happy for Carmarthenshire County Council to contact them to discuss any issues they raised.

The majority of figures throughout the report show the results as percentages. The percentages are rounded up or down from two decimal places in the results file to the nearest whole number, and for this reason, may not in all cases add up to 100%. Rounding can also cause percentages described in the supporting text to differ from the percentages in the charts by 1% when two percentages are added together.



67%

Overall Satisfaction

The survey shows that two-thirds of tenants are satisfied with the overall services provided by the Council, which has fallen since the previous survey.

The highest satisfaction is for the neighbourhood as a place to live (80%), followed by the home being safe and secure (73%) and trust in the Council as a landlord (70%)

However, some measures received less than 50% satisfaction, these being how the Council listens to tenants' views and acts upon them (49%), the opportunities to be involved in the decision-making process (43%) and having a say in managing services (40%).

In addition, 45% of tenants would recommend Carmarthenshire County Council to other people, although, 32% wouldn't, making the Net Promoter Score 13, which is positive. However, it is a little below the average for other social landlords.

Key Metrics Summary 2024



65% Quality of home



43% Decision making process



73% Safe and secure



40% Say in how services managed



60% Repairs - Overall satisfaction



70% Trust



62% Grounds maintenance



69% Rent - Value for money



80% Neighbourhood as a place to live



62% Service charge - Value for money



55% Anti-social behaviour



45% Promoters



49% Listens & Acts

National Context

The results from the previous survey in 2021 have generally fallen, but is this to do with Carmarthenshire County Council's performance or other factors?

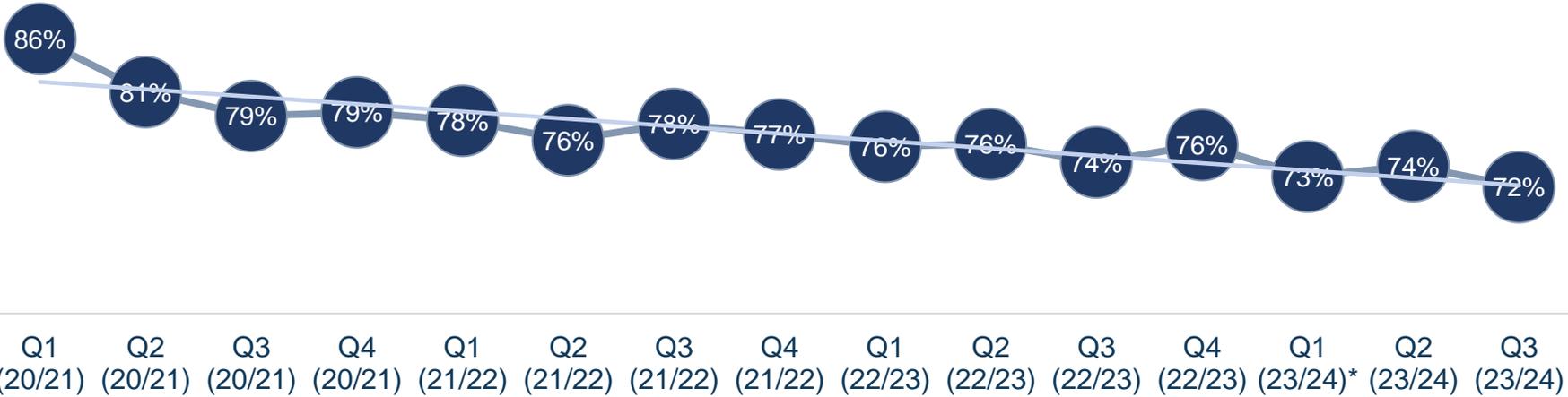
When considering the results, it is important that the national context and external factors should also be taken into account. For example:

- Cost of Living Crisis, rising poverty and reduced local authority funding
- Government & Political Changes
- Uncertainty about the Future
- Brexit and the economy

Satisfaction is based on perception rather than specific values so can be affected by these factors and how positive people feel about their lives. Factors such as the pandemic also altered the way social landlords operate, perhaps making them less accessible and responsive.

The top graph demonstrates how overall satisfaction has changed over time for Acuity's clients (tracker only). The trendline is downward over the last few years. The lower chart shows the results from Housemark members with a peak in 2015/16 and a slow decline since, this starting even before the disruption caused by the pandemic.

Overall Services (Acuity Clients)



Satisfaction with services provided (NHF/Housemark median - general needs)



*LCRA only onwards

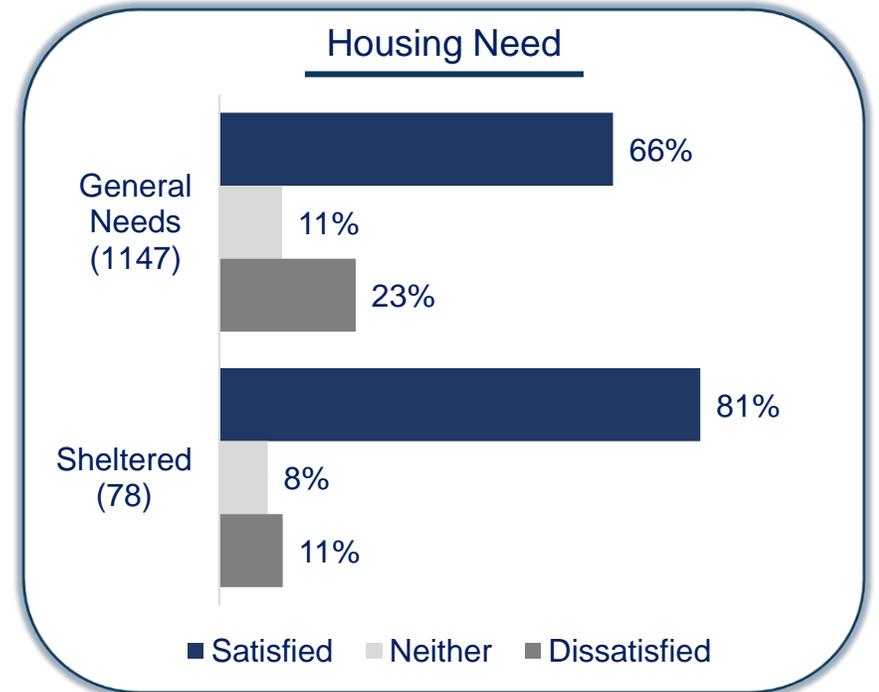
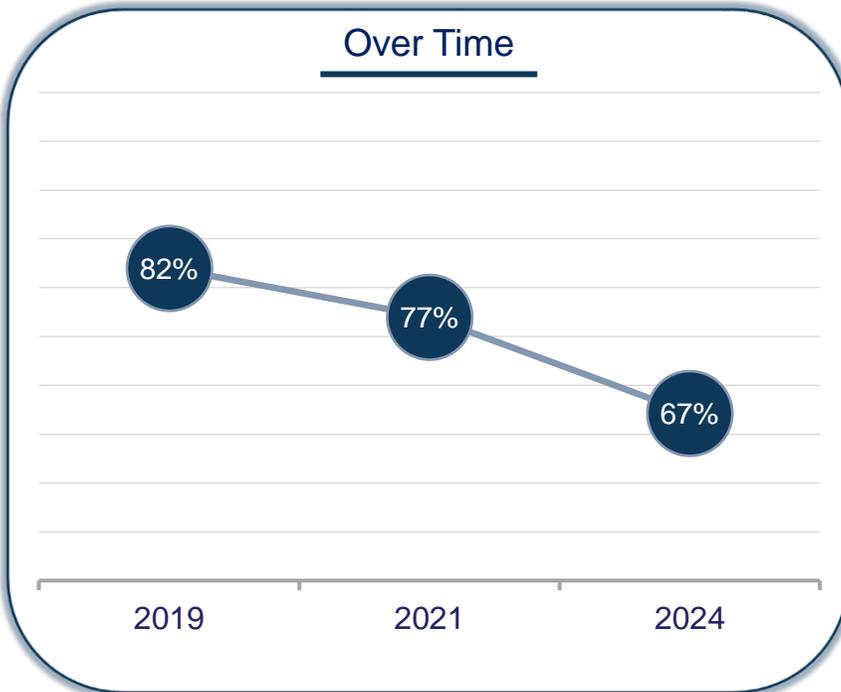
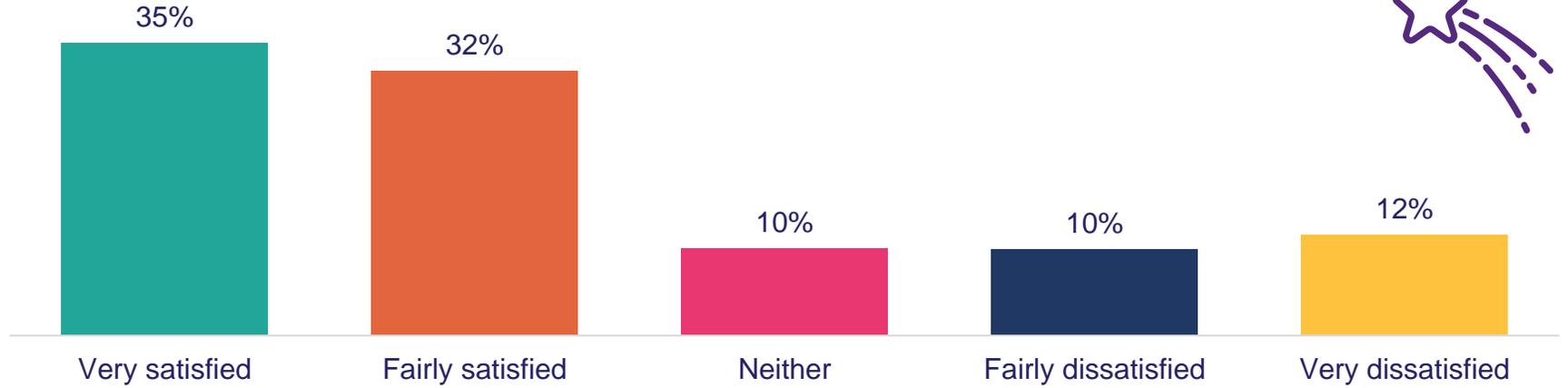


Overall Satisfaction





Overall Satisfaction



Firstly, tenants were asked, “How satisfied or dissatisfied are you with the service provided by the Council’s housing services as your landlord?” This is the key metric in any tenant perception survey.

Two-thirds of tenants are satisfied (67%), with more very satisfied (35%) than fairly satisfied (32%). However, 22% of tenants are dissatisfied, with the remaining 10% neither satisfied nor dissatisfied.

The Council carried out similar STAR satisfaction surveys in 2019 and 2021, so it is possible to plot changes over time. The 2024 results are generally lower than those in 2021; for overall satisfaction, this is down by 10 percentage points (p.p). Although as shown previously, this is consistent with a general fall in satisfaction across the sector.

A relatively small number of tenants in sheltered accommodation responded to the survey, and satisfaction tends to be higher for this group than for general needs tenants, which is commonly the case. Overall, 81% of sheltered tenants are satisfied compared with 66% of general needs tenants. The combined figure will always be close to the general needs result who make up the vast majority of responses.

The ‘understanding satisfaction’ section of this report, further analyses the results by a range of different groups, including tenure, age, gender and response method.



The Home & Repairs



The Home & Repairs

Around two-thirds of tenants are satisfied with the quality of their home, although a quarter are dissatisfied and a further 10% neither satisfied nor dissatisfied.

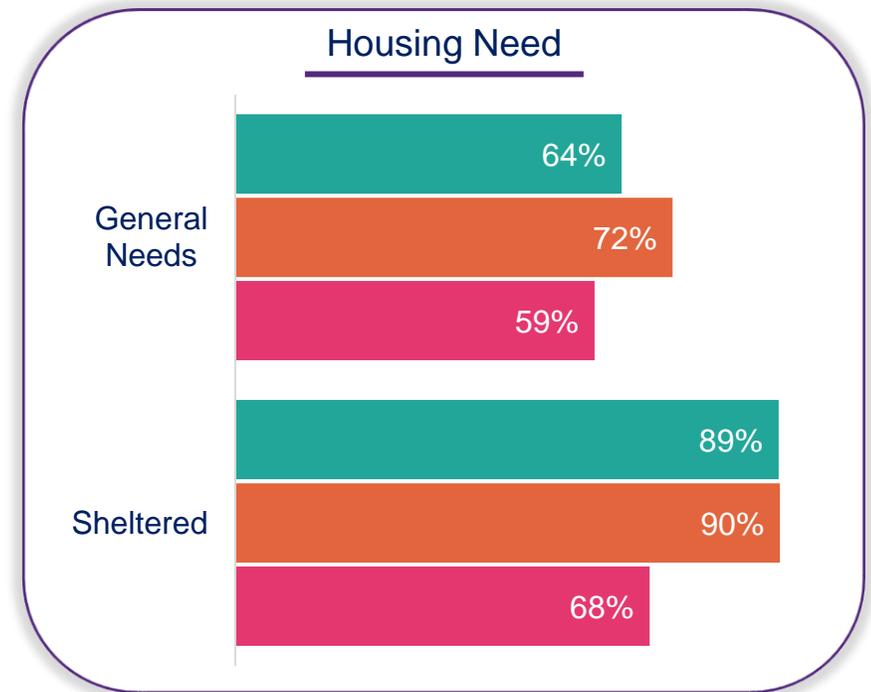
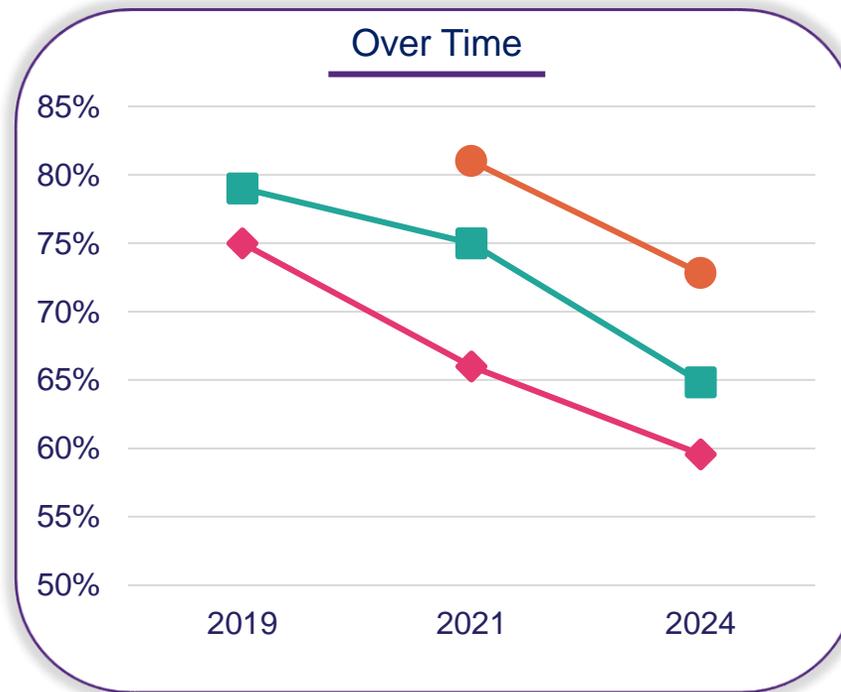
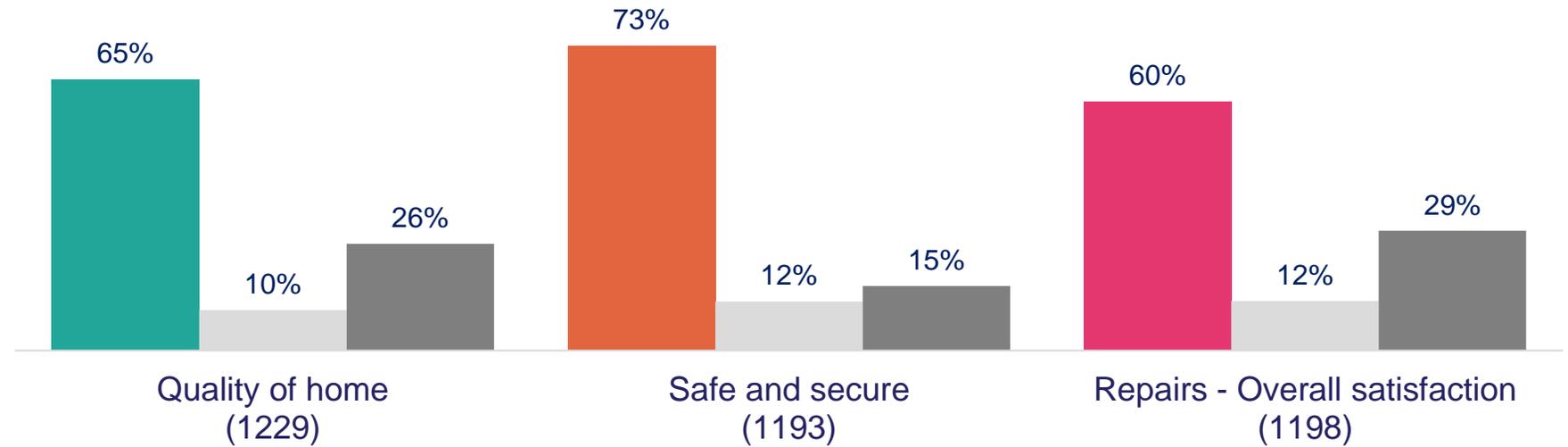
Satisfaction with the home is down by 10p.p since the previous survey.

However, more feel their home is safe and secure (73%), although this has also seen a fall in satisfaction since 2021, down from 81%. There are 15% of tenants dissatisfied with their home's safety and security.

Six out of ten tenants are satisfied with the overall repairs service, although 29% are dissatisfied. Satisfaction has fallen by 6p.p since 2021.

The next page shows satisfaction with the individual aspects of the last completed repair.

Again, sheltered tenants report higher satisfaction with their home and the overall repairs and maintenance service; a 25p.p difference on the quality of their home, 18p.p for its safety and security and a 9p.p difference on the repairs service.



Last Completed Repair

Seven out of ten tenants said they had a repair completed in the last 12 months, which is the same for both sheltered and general needs tenants.

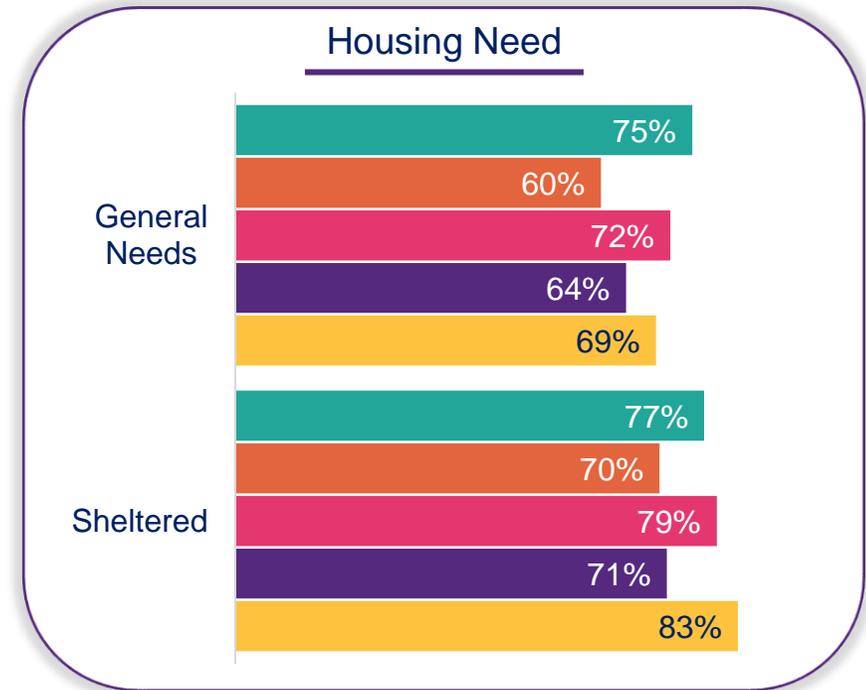
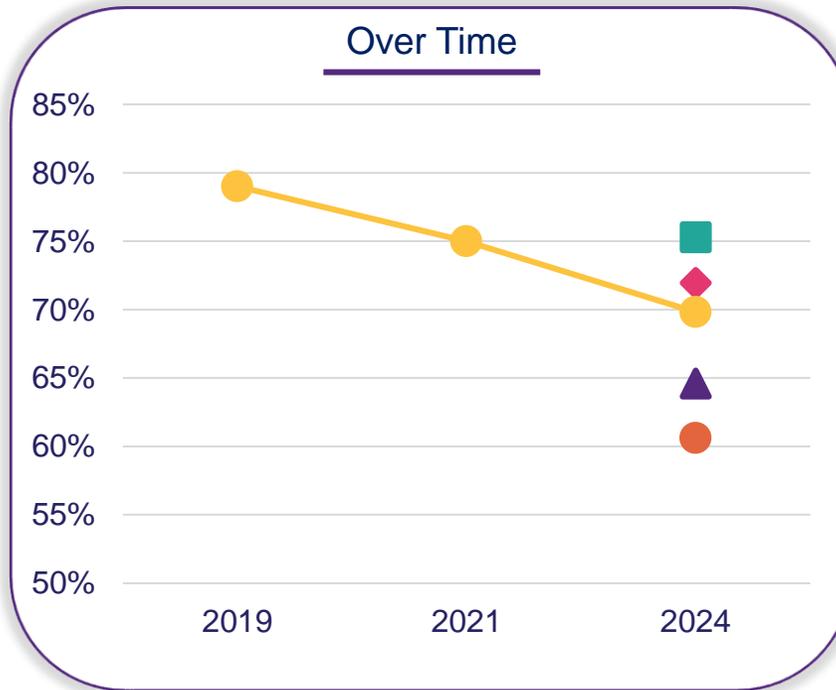
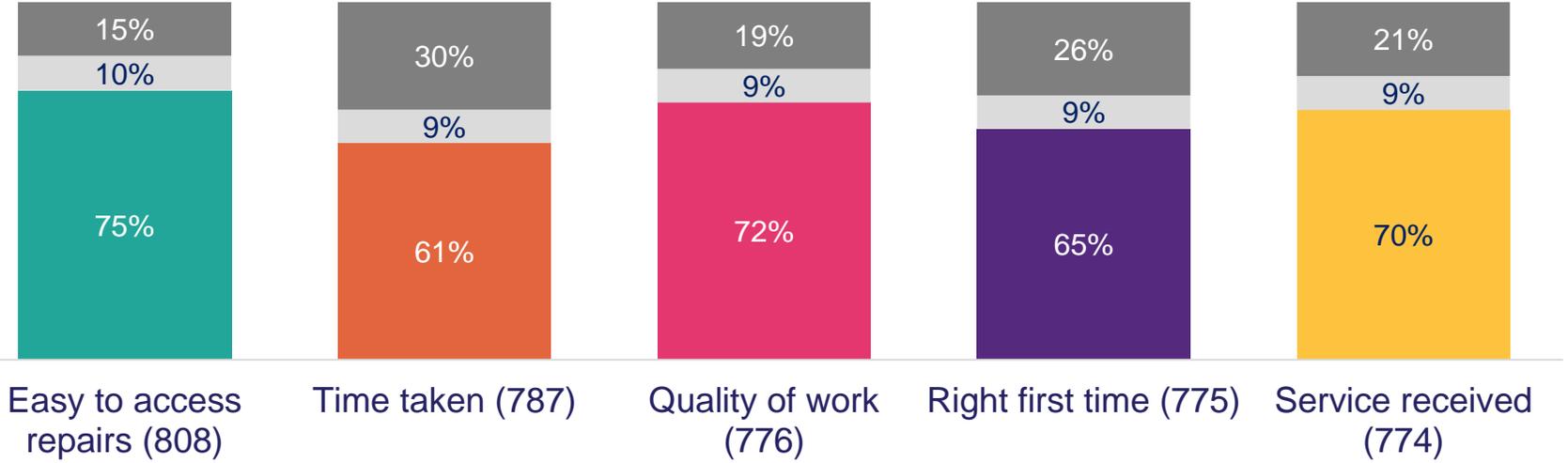
Three-quarters of tenants found it easy to access the repairs service, with similar numbers satisfied with its quality.

However, 65% are satisfied that the work was completed right first time and fewer still are satisfied with the time taken to complete the repair, 61% with 30% dissatisfied.

For the overall service on this occasion, 70% are satisfied, although this is down from 75% in 2021; this being the only one of these measures used in the previous surveys.

Again, sheltered tenants are more satisfied than their general needs counterparts, but the differences are smaller than many of the other measures in the survey - just 2p.p for the ease of accessing the service. The biggest difference is for overall service received where there is a 14p.p difference.

There is similar satisfaction across the three constituencies, suggesting the Council is delivering a consistent service.



Comments – Improve Repairs Service

Tenants were asked how the Council could improve the repairs service and 681 tenants gave suggestions.

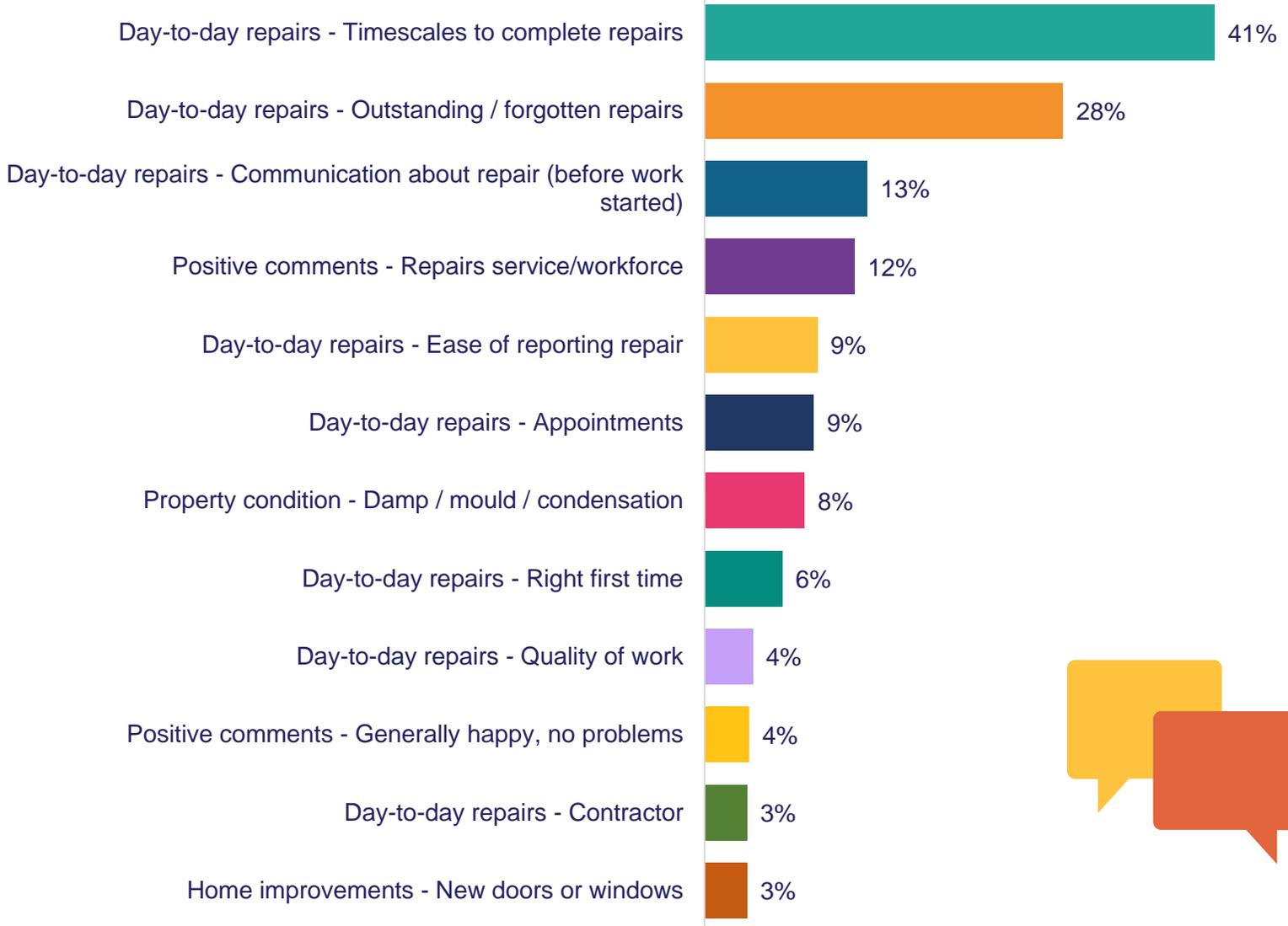
A number of comments, however, are positive about the current service, with 12%, for example, positively highlighting the workforce and the service itself

The most common area for improvement is with the time taken to complete repairs, these amounting to 41% of all the comments made. This is followed by dealing with repairs that remain outstanding or appear to have been forgotten.

These are common issues affecting other social landlords, some of whom are still catching up after the pandemic and now facing increasing costs and in some areas, shortages of materials and labour. Also, the importance of dealing with problems of damp and mould have often taken preference and so added to delays.

Other suggestions include improvements to communications and reporting, appointments and the quality of work.

Overleaf shows examples of these to help gain a better understanding of what tenants feel could be improved with the repairs service.



Number of respondents: 681

Improve Repairs Service – Comments

Day-to-day repairs - Timescales to complete repairs

“They could be quicker in carrying out the repair work, And possibly have more qualified workers and be more willing to delve deeper to find the problem.”

“Get work done to a degree of standard higher than present, faster response times.”

“There needs to be a set time frame for all requests and response and actual repairs to be done and completed fully.”

“Waiting times are too long and you do not communicate with tenants at all, you could do this better.”

“I’ve been waiting months for more repairs to be done, and now the mold is a lot worse.”

“Having a quicker system of doing repairs.”

“Do jobs quicker and to a satisfactory standard.”

“To get the repairs done quicker before it gets worse.”

“Sometimes before a repair an inspector needs to visit. This can delay repairs.”

Day-to-day repairs - Outstanding / forgotten repairs

“Inspector comes to inspect repairs, you don’t see anything being done, you have to keep on to them to have work done; it’s happened several times.”

“They could actually do the work requested instead of us having to report it repeatedly and we are currently still waiting for work to be done.”

“Sometimes they say they’ll send someone, but nobody does.”

“To keep their promises to do the repairs that are needed.”

“I cannot get anything done with them at all. After numerous phone calls, I get no response. I get told they will get it sorted, but no one ever comes out.”

“They don’t do the repairs - Had an inspector out he didn’t know why the internal was wet. I complained again it is still soaking getting higher and worse.”

“When they say they will come out to look, at least do what they say.”

Day-to-day repairs – Other issues

“Make sure the helpline is accessible more easily after hours and at weekend.”

“Not to cancel the job. Or remembering to pass the job on to the right person.”

“Sometimes it can be hard to get a hold of someone as lines are very busy, I would improve this other than this usually no issues.”

“Better communication with putting in for repairs. Provide dates, times, appointments. Regular updates for repair work. Appointments not just turning up. Council to inspect work after contractors leave so that work is done properly and up to standard, so they can return straight away.”

“They should give you a direct line, so who ever is in charge with the repairs know what is needed to be done.”

“As I work Monday - Friday 8.30-4.30 it is sometimes difficult in getting through to the repair line. As the telephone lines are busy at a lunch time when I am able to ring with my request.”

Positive comments

“We have had 1st class service on all repairs.”

“The council have been very quick and efficient in repairing any repairs that I have needed. No improvement needed from my perspective. Dai iawn.”

“In my experience the Council have carried out all repairs perfectly. For that reason, I cannot recommend any ways in which repairs services could be improved.”

“They do a brilliant job. Quick and efficient.”

“The service is first class They are always there for us when we need them.”

“Council workers by far more concerned and helpful than contractors. Far more respect to the property.”

“Please don’t change something that works well.”

“Housing officer came out, got job done straight away, very happy.”

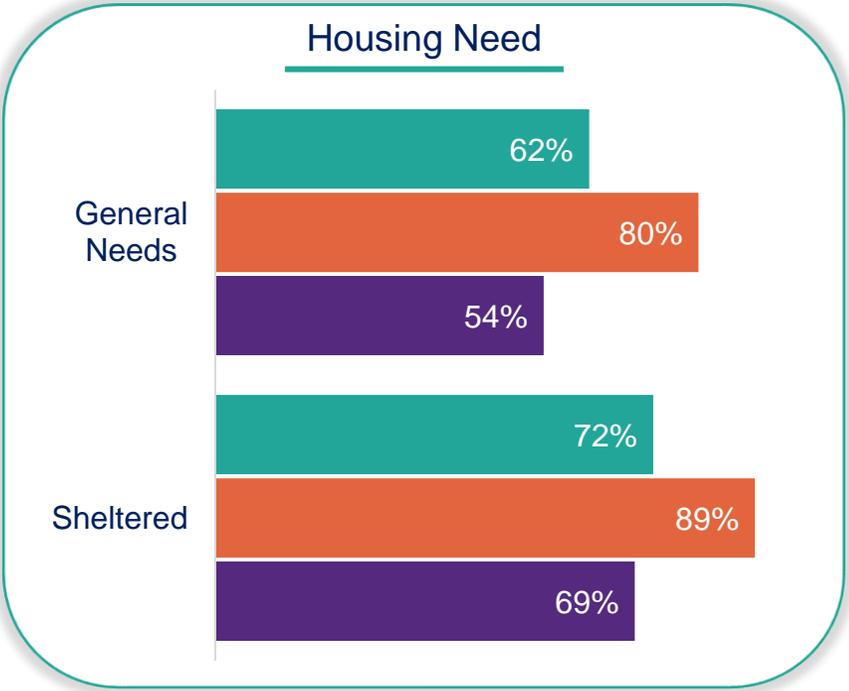
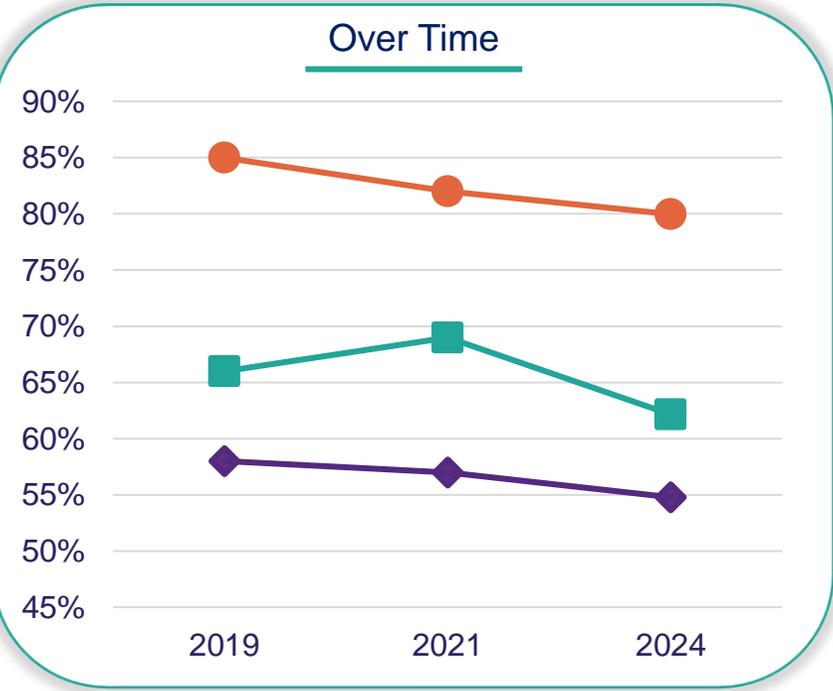
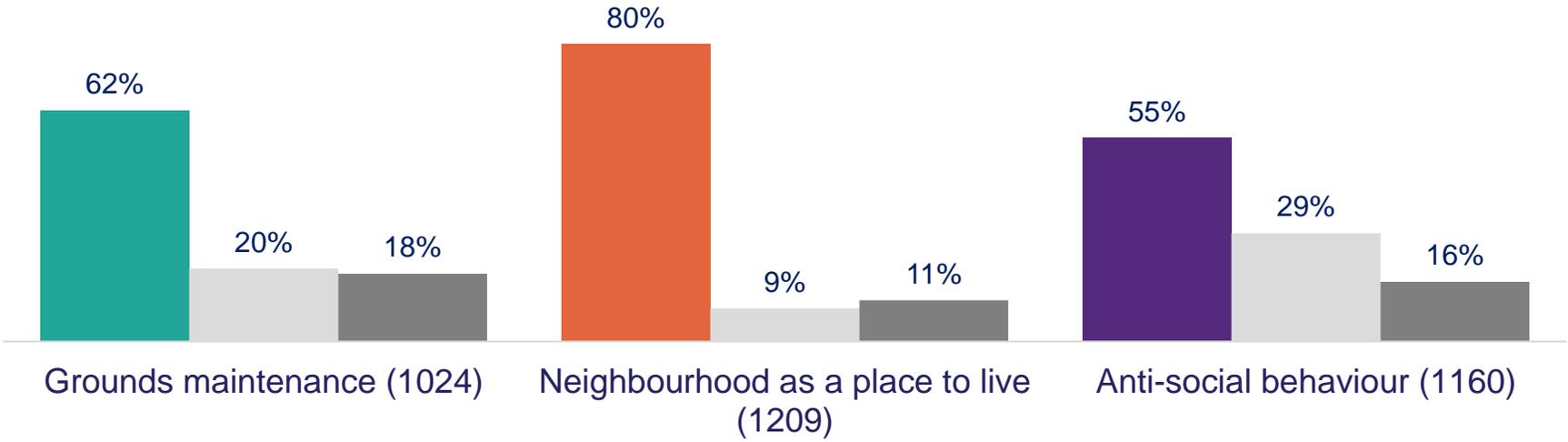
“Happy with everything.”



The Neighbourhood



Responsible Neighbourhood Management



Satisfaction with the neighbourhood as a place to live is the highest performing metric for the Council at 80%, with just 11% dissatisfied. Although this is down a little since the previous survey (82%). Sheltered tenants are again more satisfied with their neighbourhood than the general needs tenants, 89% compared with 80%.

Satisfaction with grounds maintenance, such as grass cutting, is a lower at 62%, down from 69% in 2021. There are 18% dissatisfied and a further 20% are neither satisfied nor dissatisfied. Again, the sheltered tenants are more satisfied, 10% more than the general needs tenants.

Just over half the tenants (55%) are satisfied with the way the Council deals with anti-social behaviour, down just 2p.p since the previous survey; 16% being dissatisfied. However, 29% are neither satisfied nor dissatisfied, perhaps because they haven't experienced ASB first-hand so are unable to offer an opinion. Satisfaction with dealing with ASB is again higher among sheltered tenants.





Value for Money



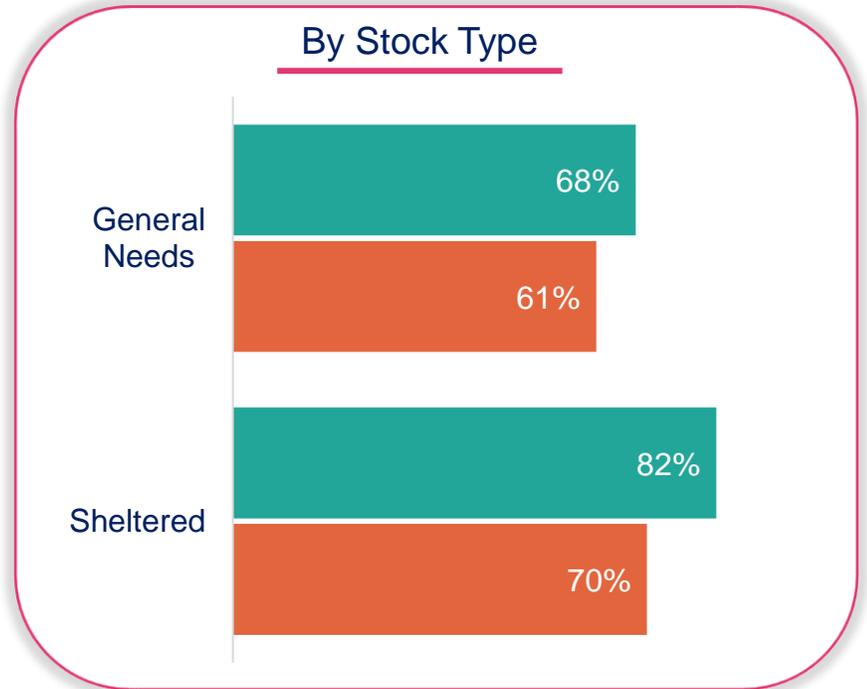
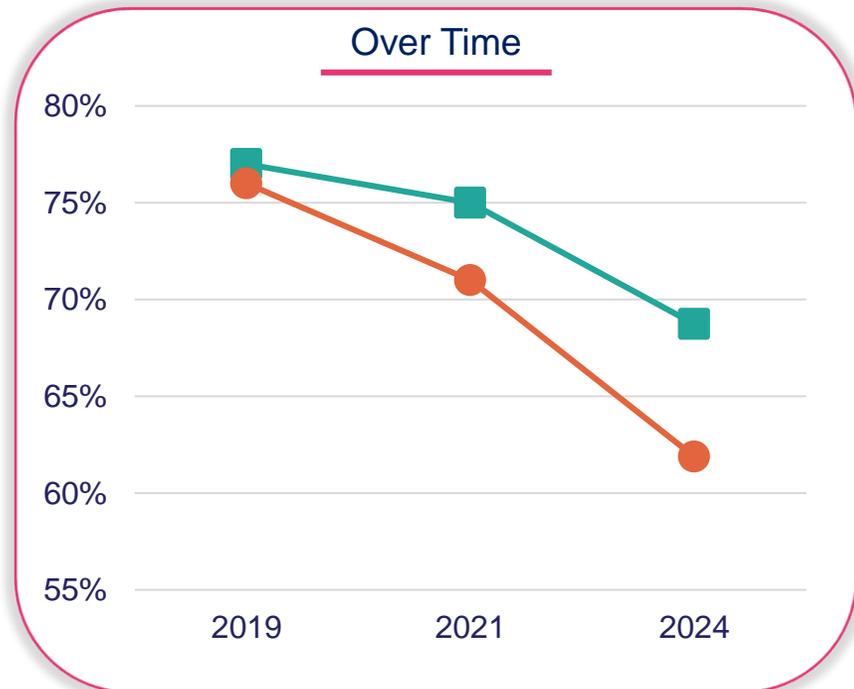
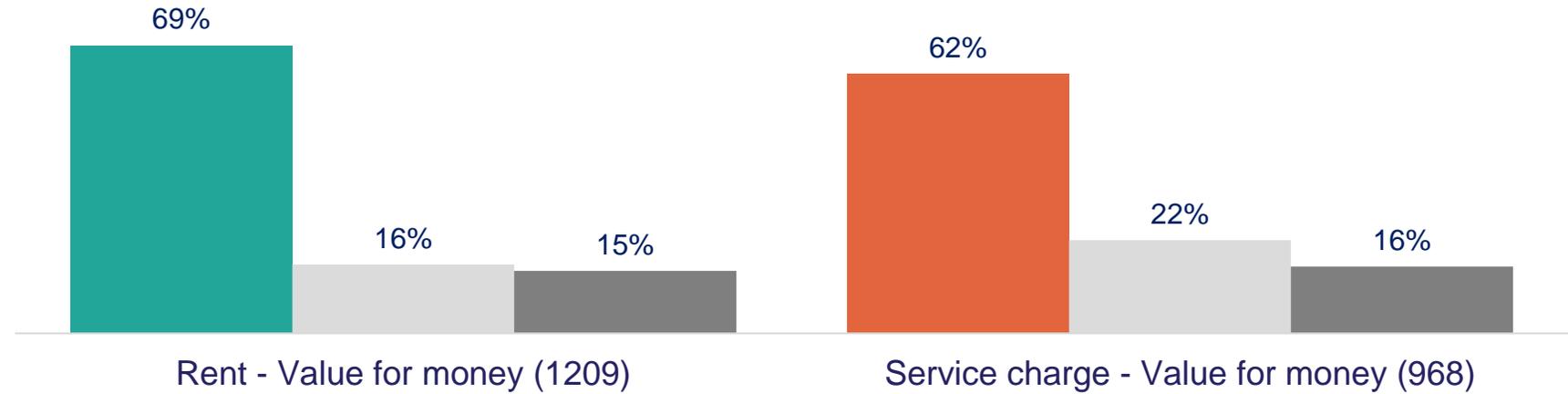
Value for Money

When asked about the value for money represented by the rent and service charges they pay, 69% are satisfied with the rent and 62% with their service charges, with similar numbers of dissatisfied tenants.

Both these have seen a reduction in satisfaction since the previous survey, down 6p.p for rent and 11p.p for service charges. Again, sheltered tenants are more satisfied.

This is perhaps not surprising given the current cost-of-living crisis, with many households struggling with their household bills. At times of increased financial pressures, it is more likely that tenants will look closer at what they get in return for the payments they make. It may even alter their expectations of their landlord and what they should reasonably expect.

Interestingly, for the value for money of service charges, although a 'not applicable' option was included, 968 tenants responded this question, of which just 126 pay service charges. For this group, 57% of respondents are satisfied with the value of money of service charges and 28% are dissatisfied.





Resident Engagement



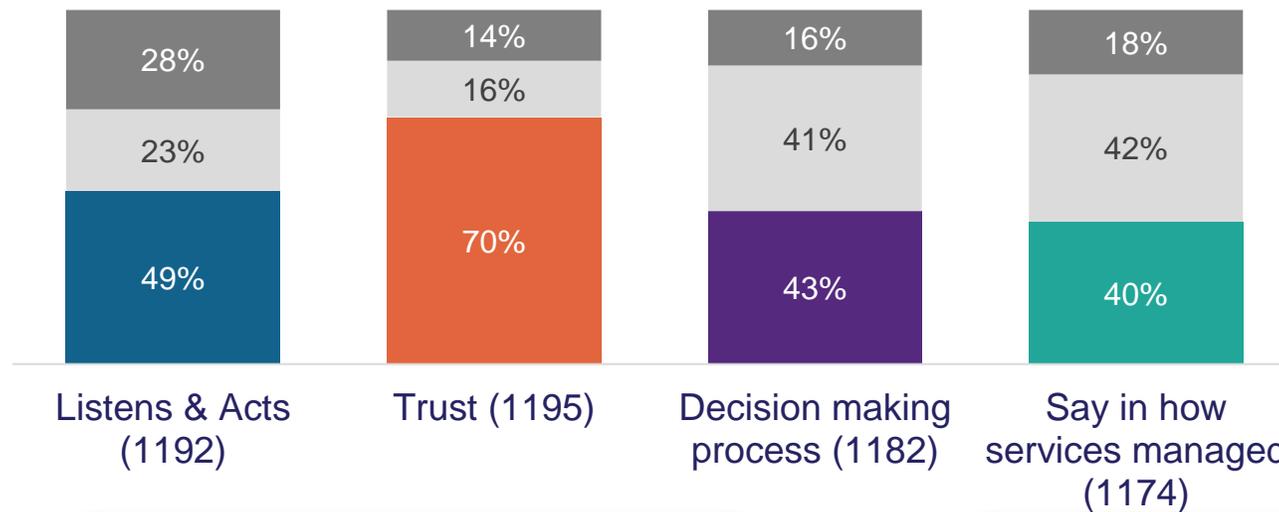
Seven out of ten tenants trust the Council as a landlord (70%), which has fallen by 10p.p since the last survey in 2021.

Fewer (49%) are satisfied that the Council listens to their views and acts upon them, down from 63% in 2021. This also has higher dissatisfaction at 28%.

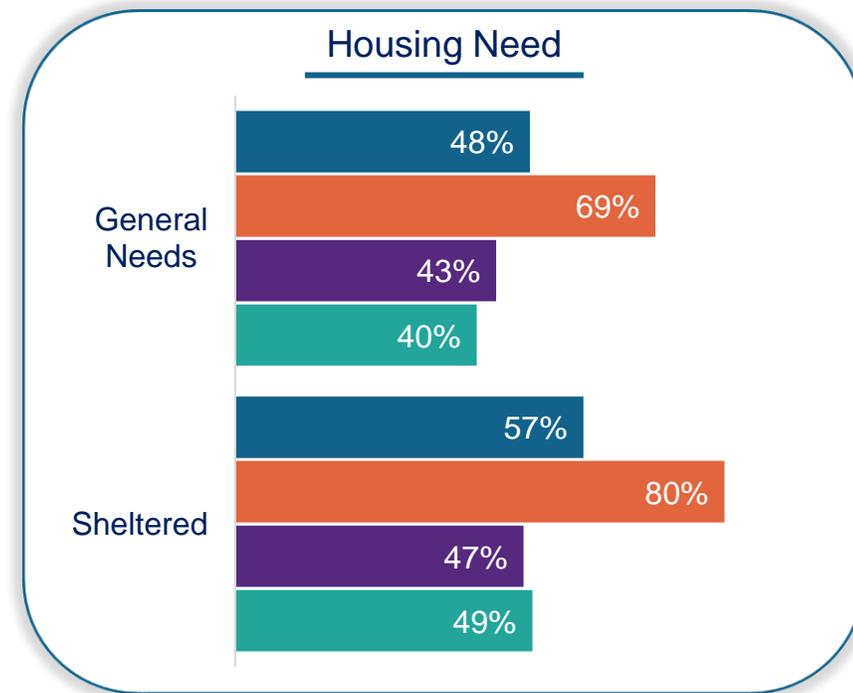
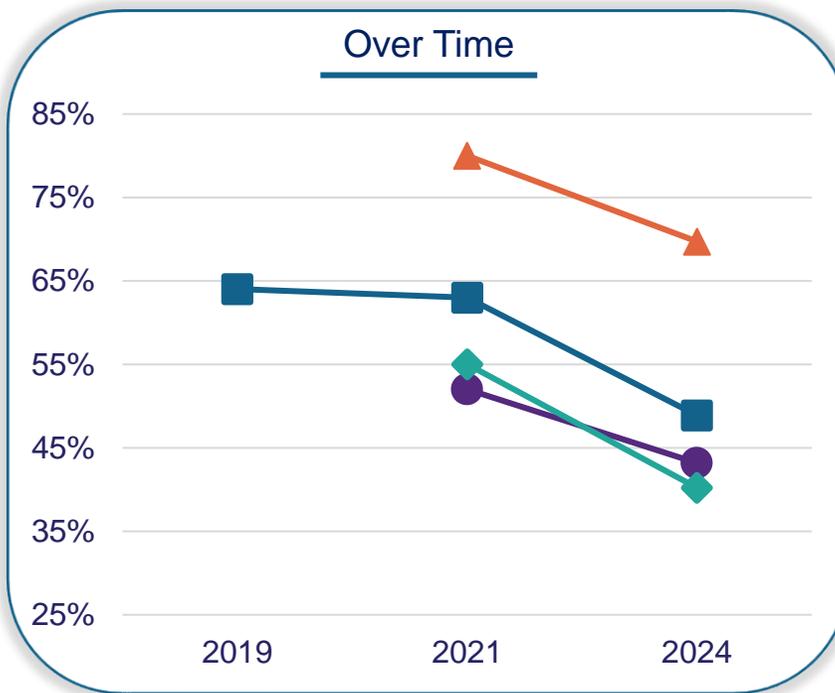
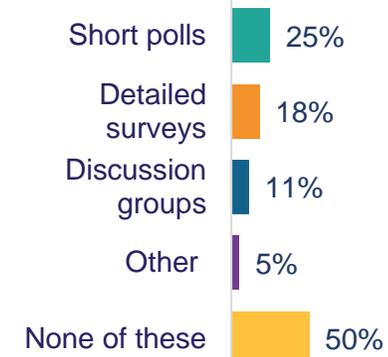
Just 43% are satisfied with the opportunities given to them to participate in decision-making processes. Slightly fewer (40%) are satisfied that they have a say in how services are managed. While there is relatively low dissatisfaction for both, there's a much higher number of tenants who answered neutrally (neither satisfied nor dissatisfied), around two-fifths for each, perhaps suggesting they are unaware of the opportunities that have, which may need increased promotion from the Council.

The Council also asked tenants how they would like to be involved in having a say about the Council's services. Various options were given, the most popular being short polls online or via social media, followed by detailed surveys (online or via telephone). Half of respondents, however, were not interested in any of these options. The names and addresses of those interested have been passed to the Council to follow up on.

Resident Engagement



Interest in Involvement



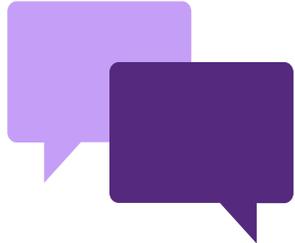
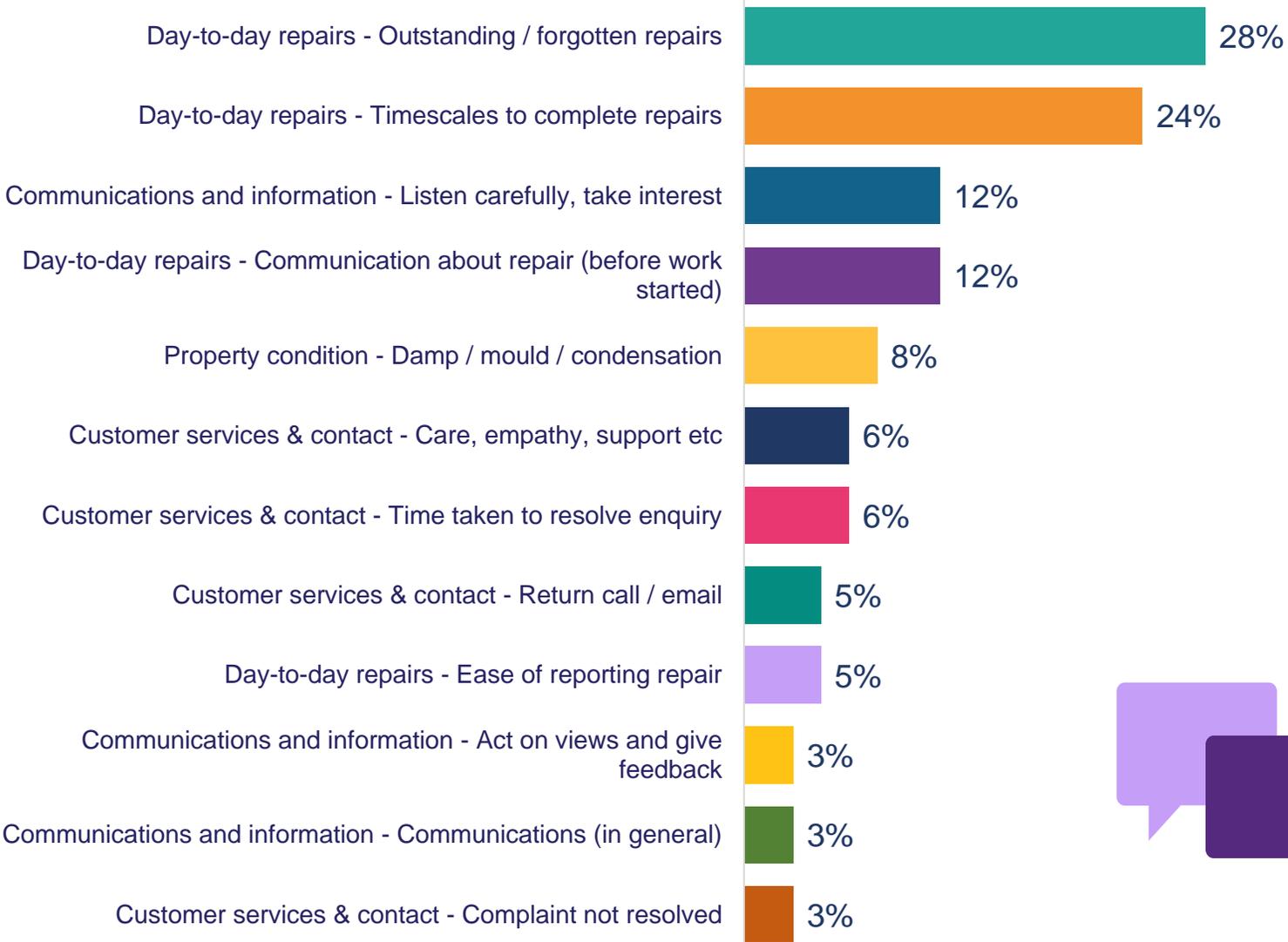
Comments – Improve Listening & Acting

Tenants who were not satisfied with how their views are listened to and acted upon were asked to explain why and what the Council could improve; 235 tenants made comments, the subject areas of which are shown opposite.

The majority of comments are linked to the repairs service, in particular, dealing with outstanding repairs and the time taken to complete repairs. Tenants also mention communication issues around the repairs service and the ease of reporting repairs.

However, general communication is mentioned by some, wanting staff to listen to them more carefully and take an interest in their concerns and also to show a little more care, empathy and support when they do make contact.

Some examples of comments are shown on the next page, which should help the Council to better understand the issues faced by some when contacting the Council, whether that be to report a repair or for some other issue.



Number of respondents: 235

Improve Listening & Acting – Comments

Day-to-day repairs

“Where repairs are concerned, you report it, inspector comes out, don’t hear anything, you have to report it again.”

“Feels like they ignore you. They say they will get the work done or on the phone but its like they are not interested.”

“When I report repairs it takes months and months for someone to come out to check then takes about 6 months for work to be done.”

“Listen to your tenants. Be proactive and not reactive. Windows and doors are leaking and draughty. Been inspected and promised three times that they’ll be replaced. No visit booked. CCC have tenants that look after their properties, but CCC don’t look after them.”

“Don’t act upon anything when requested, have to keep ringing.”

“Better communication with tenant and inspectors and whoever takes the messages etc.”

“Better quality, faster service.”

Customer service & contact

“To call back when promised, and deal with issues in a timelier manner.”

“Tenants aren’t listened to and constantly fob off.”

“Not listened to. A bad service for victims of domestic abuse. Had to appeal and wait weeks for housing.”

“Stop passing people around. Give them answers & results. Reassurance that the issues will be taken seriously & are resolved as soon as possible.”

“I asked for someone to come around re. a shed for my mobility, scooter last year. Still waiting.”

“Taking too long to respond.”

“As they don’t really do much about the complaints and they just keep happening over and over again.”

“Reported numerous times about rubbish collection over the years but nothing done.”

“They don’t care.”

Communications & information

“More communication between the council and tenants.”

“I have made complaints about housing and neighbourhood, but no one listens or does anything, it just gets worse.”

“They could come out and talk to us and when they do come out - they tell no one beforehand & nobody knows who they are in the area.”

“I feel that the council could do more to listen what tenants say, this can be done via surveys, phone, letters holding tenant meetings that all can be included disabled elderly. By clearly knowing who your housing officer is would be extremely helpful when requiring support.”

“If the building inspector listened to the housing officer as to tenants needs. And if building inspector knew the history of the property. If I didn’t treat people like idiots.”

“Because no one listens and no one asks.”

“We see nobody and if you do, they do nothing.”

Other matters

“Make sure all council households are made to a high standard and provide high standard living conditions instead of basic poor conditions.”

“I have been waiting for a number of jobs to be done and been living here six years. Have had jobs done but jobs take too long. Parking could be better and ASB.”

“I have had inspectors out on my bathroom, ceilings, windows, locks, etc all need replacing but nobody ever contacts me.”

“Tenants have requested for speed bumps to be put in place to prevent speeders and safeguard children.”

“Supposed to be a wheelchair accessible home but can’t fit through doors and it is dangerous due to lack of space, wet room etc.”

“I have contacted council about parking spaces for tenants at community matters. Absolutely no response.”

“By lowering curbs & driveways.”



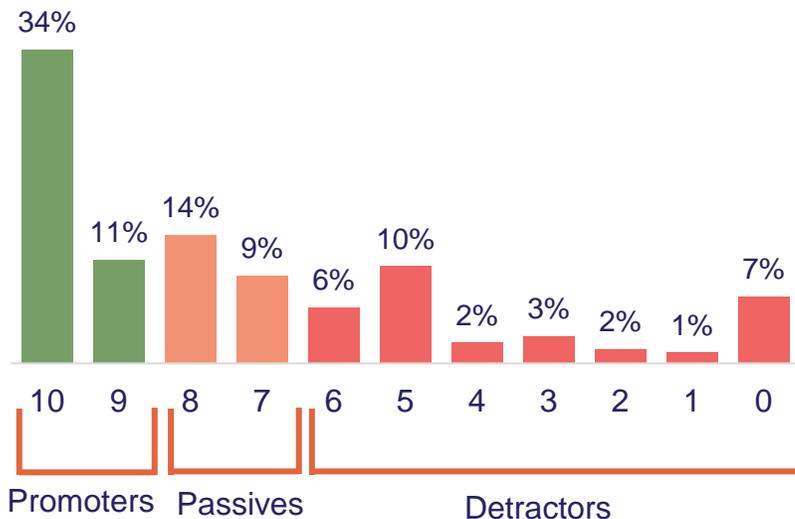
Recommending & Improvements



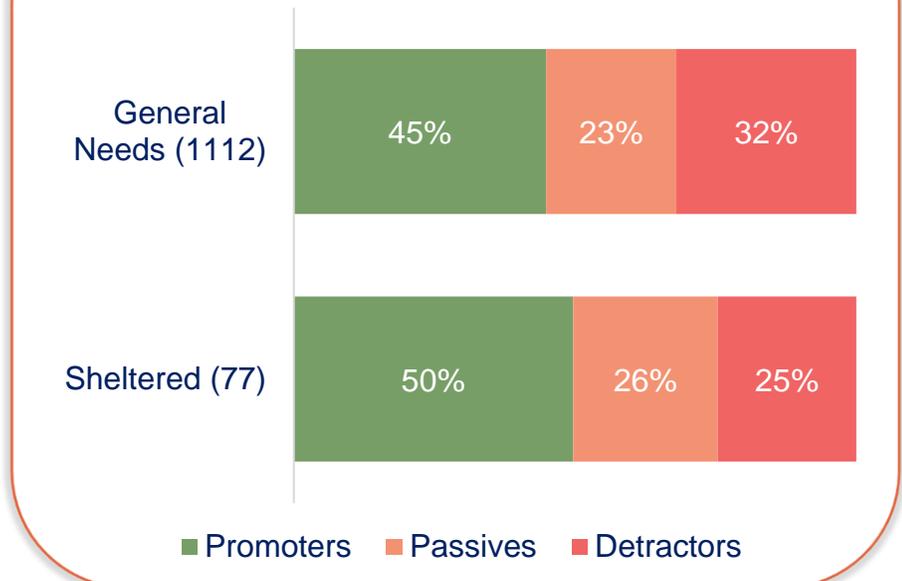
Recommending Carmarthenshire County Council



How likely would you be to recommend Carmarthenshire County Council to other people?



Housing Need



Tenants were asked, “How likely would you be to recommend the Council’s Housing Services to family and friends on a scale of 10 to 0, where 10 is extremely likely and 0 is not at all likely?”

A little under half the tenants are promoters, very loyal and happy to promote Carmarthenshire County Council to other people (45%), with 34% giving a score of 10 out of 10.

Just under a quarter of tenants are currently passive and could be persuaded either way (23%). However, 32% are detractors, and likely to have negative views about Carmarthenshire County Council.

Some 14% of tenants gave a score of 8 out of 10 – this is an important group as with a little improvement they could become promoters.

The Net Promoter Score (promoters minus detractors) is +13. This is a little below average for Acuity tracker and one-off clients of +23 in 2023/24.

Again, there is a difference between the tenures with a score of 25 for the sheltered tenants and 13 for the general needs tenants.

13
NPS

Improvement Suggestions

All tenants were asked what one thing the Council's housing services could improve. 761 tenants gave comments.

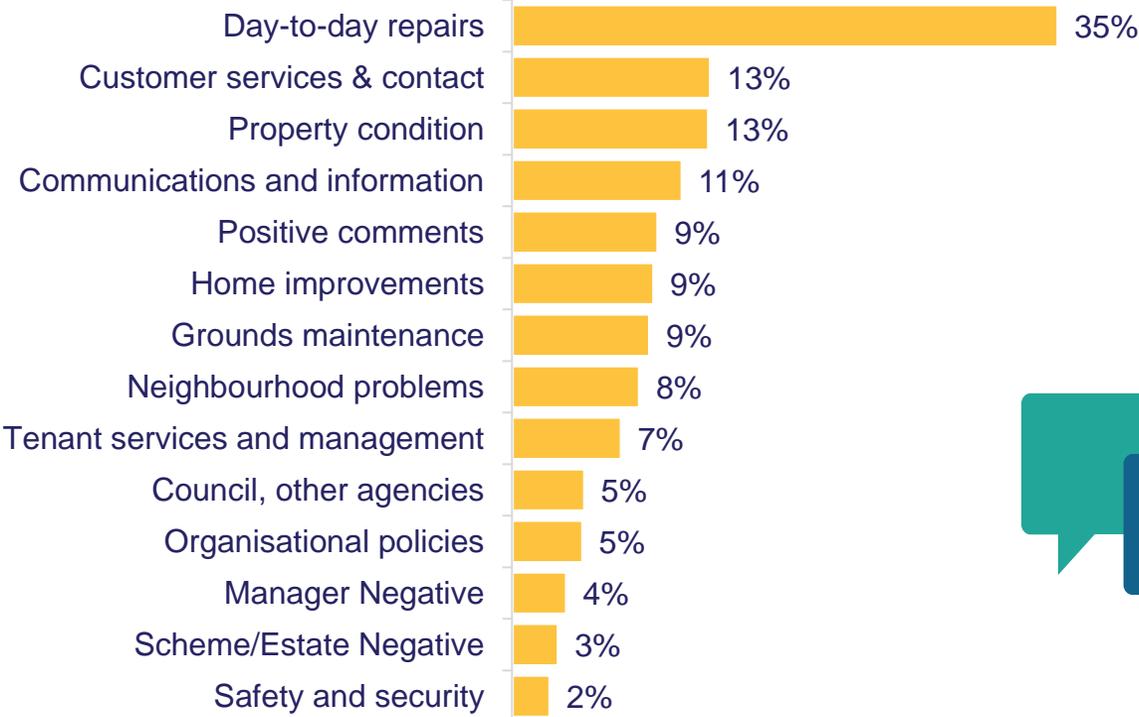
Of these, 9% commented positively about the current services provided, suggesting in most instances that there were no improvements to be made – “*My first year as a tenant has been excellent. More of the same!!*”

As expected, the repairs service attracted the most suggestions for improvement, these making up 35% of all comments made. In particular, tenants want their repairs completed quicker, outstanding repairs dealt with and communications about the repair to improve.

This is followed by improvements to customer service, with tenants wanting staff to show them a little more care, empathy and support when making contact, followed by property condition and communication issues.

These comments are available to view in full in the raw data extract and will give insight to help the Council drive meaningful and purposeful service improvements based on real tenant concerns. A selection of these comments has been provided on the next page.

Categories



Number of respondents: 761

Improvements to Service – Comments

Day to day repairs

“Time they take to complete work needed. Communication letting client know as soon as they can, I have serious problems and my son he had heart surgeries.”

“To actually keep to the date that was said they would come out to view the house.”

“If a repair is required, then it should be done to completion and followed up to check that all done completely to householders’ satisfaction.”

“They could actually do the work the inspector promised to do.”

“More accurate when it comes to being given a specified time - then they sometimes turn up a lot later.”

“Easier access to repair line.”

“Making sure houses have been repaired properly when houses are empty.”

“Better communication with when waiting for repairs.”

“Better call out time.”

Customer service & contact

“To understand older peoples’ requirements and needs.”

“Easier access on the phone to speak to the department you need.”

“Provide tenants with a list of emergency telephone numbers, not everybody has access to them online.”

“Answer the phone faster.”

“Staff seem to move very quickly meaning, no continuity of service.”

“Make contact easier, more people to answer the telephone!”

“Every tenant’s needs are different from another so I would look at what each individual tenant and work out what is best for them.”

“Listen when a complaint is reported.”

“To investigate more promptly when a tenant has a practical problem that needs sorting out as it is having an impact on daily life within their home.”

Property condition

“The state of the houses inside, e.g. mould, damp, walls that need replastering. Help with outdoors e.g. garden maintenance that may be too much for families to take upon themselves.”

“Outer coverage or painting exterior walls as it degrades other properties.”

“Insulation. My house is like a wind tunnel and has no insulation between my ceiling and the upstairs flats floors, and very little wall insulation.”

“I would like to see council check maintenance on all their houses more often. Cleaning gutters and down pipes, will help to keep houses dry and stop dampness.”

“Treating tenants better, better standard of housing, respect, communication, honesty.”

“It would be nice if the grounds where people live could be checked on once in a while to see they are properly maintained.”

“Safety standard of their homes.”

“Insulation and draft proofing.”

Communications & information

“More active housing officer. Who meets us, knows us and visits our area regularly.”

“Nobody asks residents what we would like! Communication between residents & manager.”

“Listen to the tenants (especially long-term tenants) and get the right people to do the jobs they are meant and qualified to do.”

“Inform us about what is happening in the area.”

“Establish facilities for neighbourhood meetings.”

“Would suggest that in order to improve services etc that they listen to complaints and take action.”

“Regular calls/visit from the housing officer to check how things are as a tenant - they change and don’t let you know who they are.”

“Communication with tenants. Approachability please.”



Trends



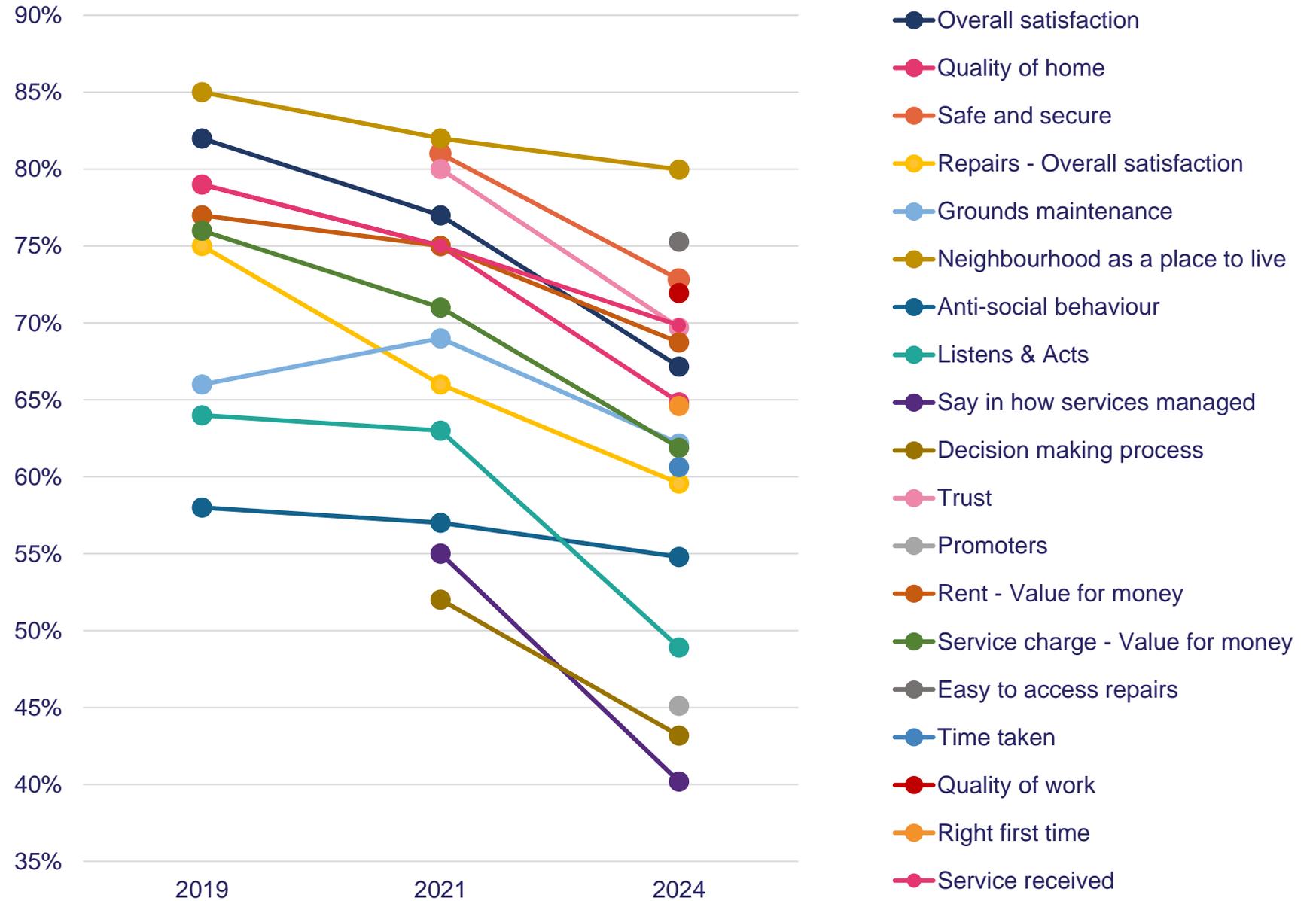
Trend Over Time

As has been shown throughout this report, satisfaction has generally fallen since the previous survey in 2021, which mirrors what is happening generally across the sector. This is not surprising given increasing pressures on households over that time.

This decrease in satisfaction has been between 2p.p and 15p.p on all comparable measures.

To be statistically significant, changes need to be more than the combined margins of error for both surveys, so for the Council this will be around 6%; many of the changes do exceed this figure.

The biggest changes are for having a say in managing services (down 15p.p), listening to tenants' views and acting upon them (down 14p.p), the quality of the home and trust in the Council (both down 10p.p) with overall satisfaction falling by the same amount.



Year on Year Change

The table to the right further illustrates how satisfaction has fallen since the previous survey in 2021, which follows the general trend. Taken together, the average decrease is 8p.p.

Some of the questions in the current survey have been used for the first time so there is no trend information, but this will build up when used again in future surveys.

	2021	2024	Change
Overall satisfaction	77%	67%	-10%
Quality of home	75%	65%	-10%
Safe and secure	81%	73%	-8%
Repairs - Overall satisfaction	66%	60%	-6%
Grounds maintenance	69%	62%	-7%
Neighbourhood as a place to live	82%	80%	-2%
Anti-social behaviour	57%	55%	-2%
Listens & Acts	63%	49%	-14%
Trust	80%	70%	-10%
Rent - Value for money	75%	69%	-6%
Service charge - Value for money	71%	62%	-9%
Promoters	--	45%	
Decision making process	52%	43%	-9%
Say in how services managed	55%	40%	-15%
Service received	75%	70%	-5%
Easy to access repairs	--	75%	
Time taken	--	61%	
Quality of work	--	72%	
Right first time	--	65%	





Understanding Satisfaction



Satisfaction & Dissatisfaction

The charts opposite show both the levels of satisfaction and dissatisfaction with the range of services provided.

Sometimes where satisfaction is low, the remaining tenants can be split between those who fall into the neutral middle ground and those who are actually dissatisfied. This difference can signal areas where tenants do not have strong opinions or areas where a high percentage of tenants are actually dissatisfied.

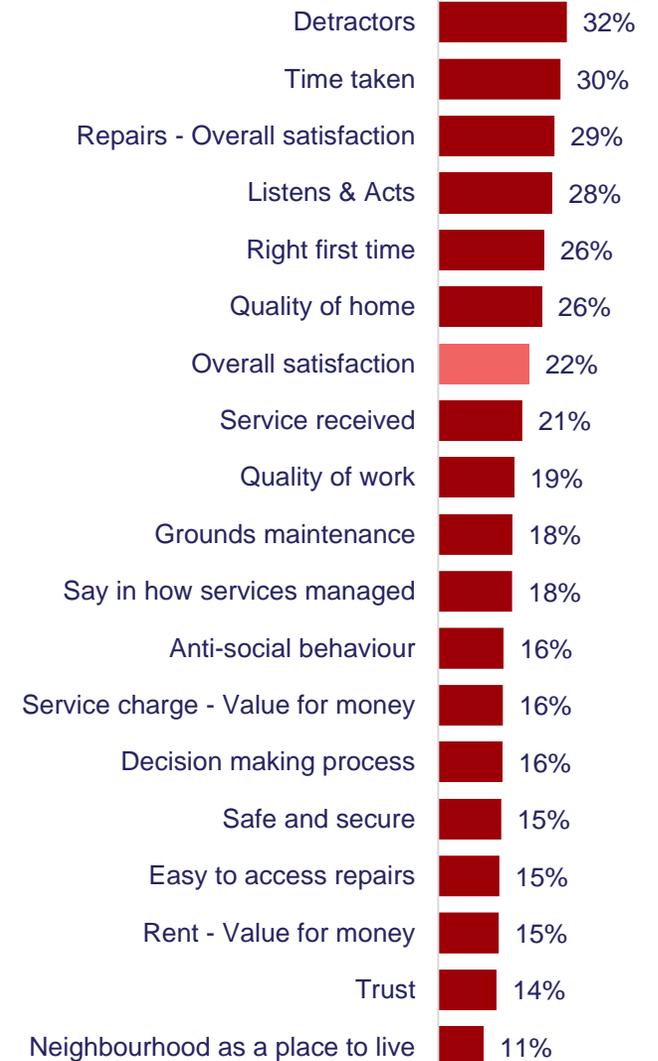
As can be seen here, low satisfaction does not necessarily correspond smoothly with high dissatisfaction. The metrics with the highest dissatisfaction are around repairs (time taken before work started and satisfaction with the overall repairs service). However, these do not draw the lowest levels of satisfaction.

The two metrics with the lowest satisfaction – satisfaction with the opportunities to participate in the decision-making process and satisfaction with having a say in how services are managed – draw a large portion of neutral responses, where tenants are neither satisfied nor dissatisfied, 41% and 42% respectively.

Satisfaction with measures 2024



Dissatisfaction with measures 2024





Combined Comments

The tables to the right include an analysis of all comments received across open-ended questions used in the survey, with positive comments displayed in green.

The repairs service receives over half of the comments made with tenants wanting repairs done quicker, outstanding repairs dealt with, and communication improved, together with better appointments, quality of work and easier reporting.

Linked to this is the comments about the condition of their properties, including problems with damp and mould, whilst some want staff to show them more care and to listen to their needs more carefully.

However, it is good to note that some tenants made the point of leaving positive comments about the service and it should be remembered that the report is here to highlight where improvements can be made but most interactions work well.



Top Comment Areas	
Day-to-day repairs	52%
Property condition	15%
Positive comments	12%
Customer services & contact	11%
Communications and information	9%
Home improvements	8%
Grounds maintenance	7%
Neighbourhood problems	5%
Tenant services and management	5%
Manager Negative	3%
Council, other agencies	3%

Hot Topics	
Day-to-day repairs - Timescales to complete repairs	27%
Day-to-day repairs - Outstanding / forgotten repairs	21%
Day-to-day repairs - Communication about repair (before work started)	9%
Property condition - Damp / mould / condensation	6%
Positive comments - Repairs service/workforce	5%
Day-to-day repairs - Appointments	5%
Day-to-day repairs - Ease of reporting repair	5%
Communications and information - Listen carefully, take interest	5%
Customer services & contact - Care, empathy, support etc	4%
Positive comments - Generally happy, no problems	3%
Home improvements - New doors or windows	3%
Day-to-day repairs - Quality of work	3%
Day-to-day repairs - Right first time	3%

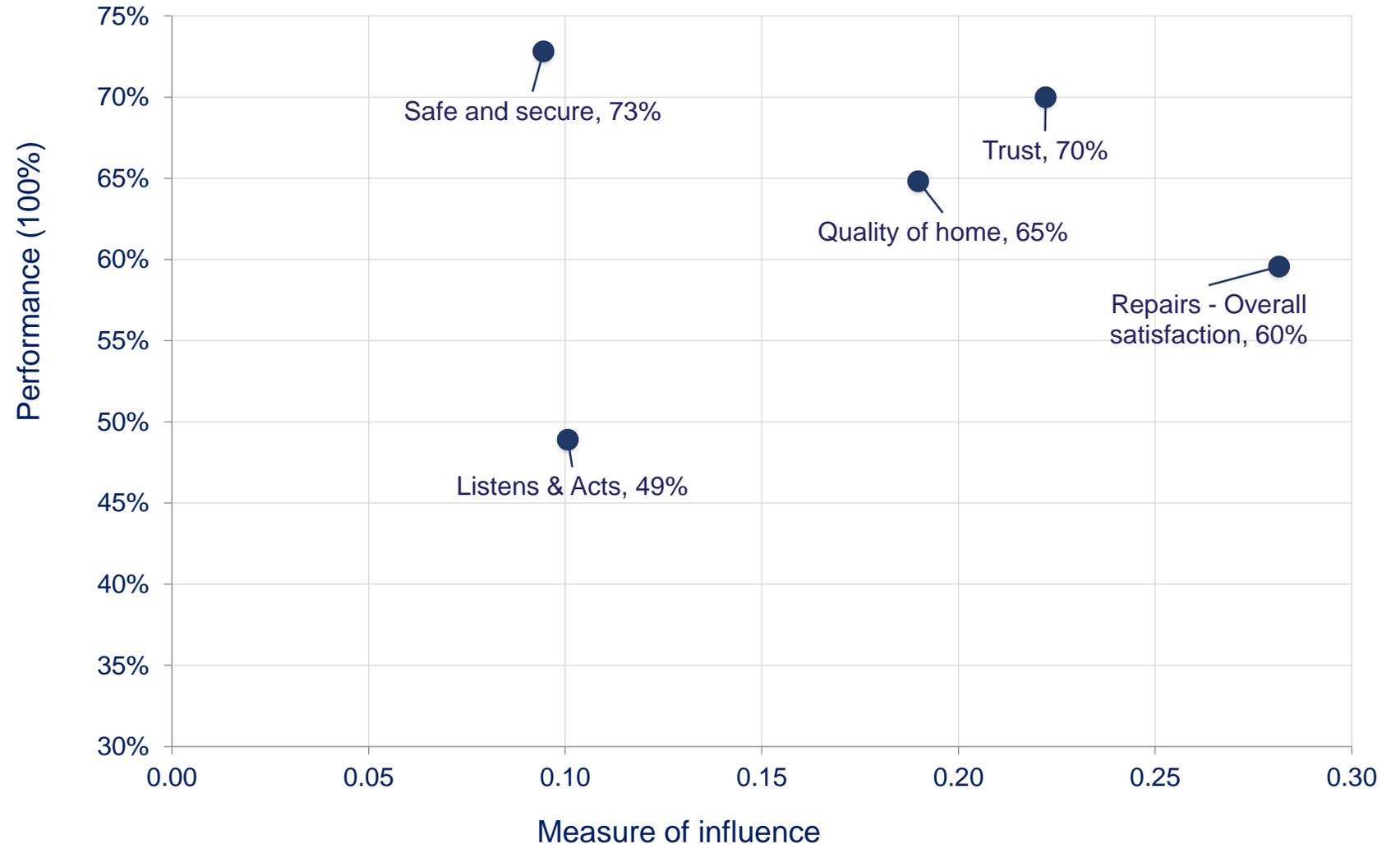
Key Driver Analysis

Key driver analysis is used to examine the relationship between the different variables (the questions asked in the survey) and determine which elements of the service are the key drivers for tenants' overall satisfaction.

Each landlord will produce a unique pattern of influence and for Carmarthenshire County Council the most important driver for tenants' satisfaction with the overall services is the overall repairs service, which is reflected by the number of comments received in this area. Also of importance is the trust tenants have in the Council, the quality and safety of the home and how the Council listens to tenants' views.

The implication of this analysis is that if improvements around the most influential measures can be achieved, it is more likely to lead to increased satisfaction with the overall services provided.

Key Driver Analysis – Overall Satisfaction



Benchmarking – Wales

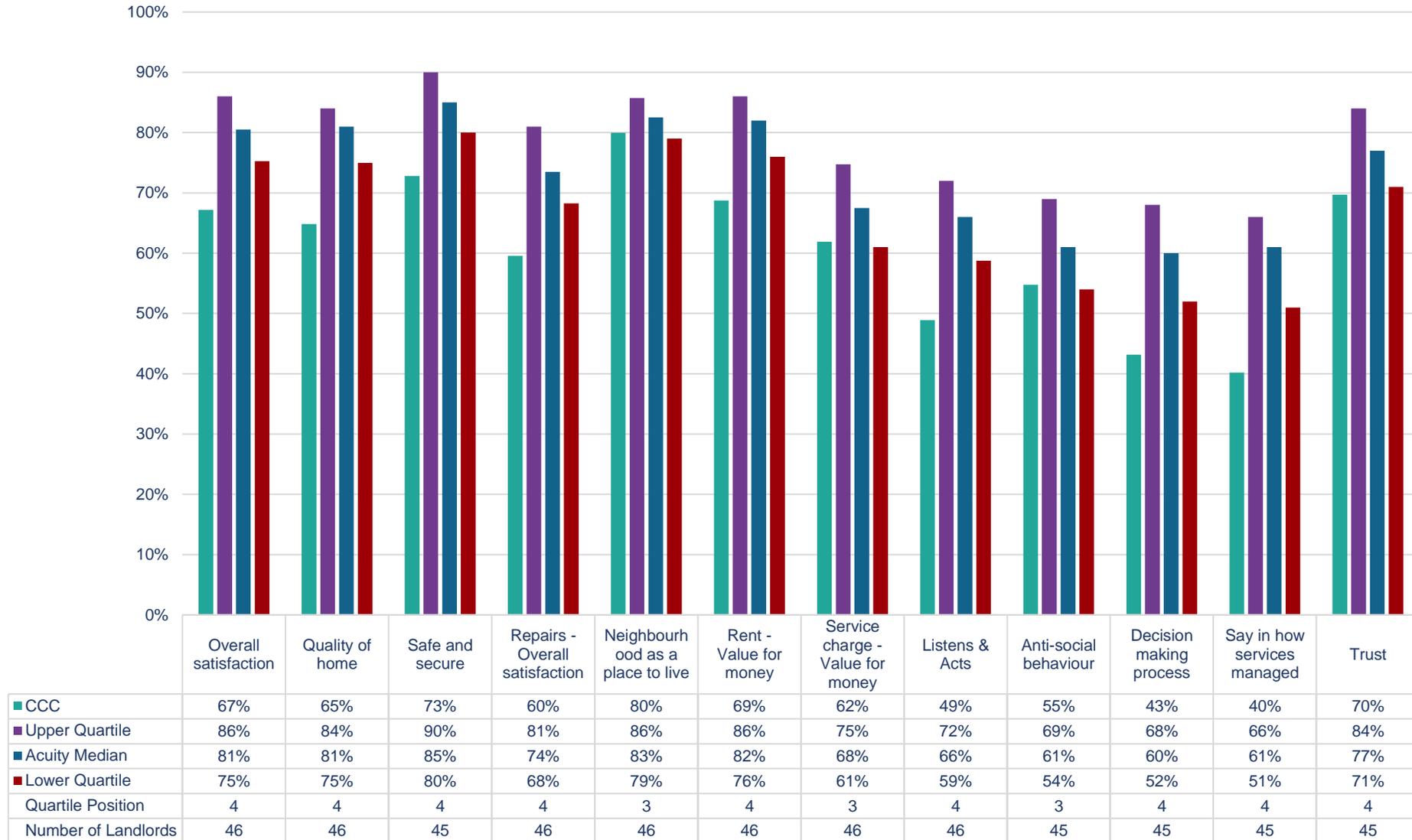
It is also possible to compare performance on the core questions against the Welsh Governments' figures for 2023.

This shows that satisfaction is below the median on all measures listed here, with nine falling into the lower quartile, including overall satisfaction. The remaining three measures are in the third quartile, these being the neighbourhood as a place to live, the value for money of the service charges and dealing with ASB.

Whilst these comparisons are for 46 landlords operating in Wales, they do vary in type, size and location so will not be directly comparable with the characteristics of Carmarthenshire County Council, but they do help provide some context to the results.

This benchmarking exercise also suggests that the Council needs to improve to be able to compare better with other landlords in Wales.

Welsh Government Figures 2023



Housing Need

It is common in surveys of this type that older people, and those in sheltered accommodation, are more satisfied than their general needs counterparts. This is also the case for Carmarthenshire County Council, although far fewer sheltered tenants (80) responded to the survey than general needs tenants (1,170), which reflects general population splits.

In fact, sheltered tenants are more satisfied on all these measures and they are more likely to recommend Carmarthenshire County Council to others.

The differences are also quite large in some areas, 15% for the overall satisfaction, 25% on the quality of the home and 5% more would recommend the Council to family and friends. The average difference is 11%.



	General Needs	Sheltered
Overall satisfaction	66%	81%
Quality of home	64%	89%
Safe and secure	72%	90%
Repairs - Overall satisfaction	59%	68%
Grounds maintenance	62%	72%
Neighbourhood as a place to live	80%	89%
Anti-social behaviour	54%	69%
Listens & Acts	48%	57%
Decision making process	43%	47%
Say in how services managed	40%	49%
Trust	69%	80%
Rent - Value for money	68%	82%
Service charge - Value for money	61%	70%
Promoters	45%	50%
Easy to access repairs	75%	77%
Time taken	60%	70%
Quality of work	72%	79%
Right first time	64%	71%
Service received	69%	83%

Base: General Needs = 1,170, Sheltered = 80

Constituency

There are three main constituencies within the County Council area and satisfaction of the tenants in each are shown here.

Overall, there is very little difference between the areas, which suggests that the service is being delivered consistently across the areas.

Those in Llanelli tend to be a little more satisfied than those in the other areas, with tenants in Carmarthen East and Dinefwr marginally the least satisfied

The results file also shows the results by ward area, but there are too many to be included on a table here.

	Carmarthen East and Dinefwr	Carmarthen West and South Pembrokeshire	Llanelli
Overall satisfaction	64%	65%	70%
Quality of home	64%	65%	65%
Safe and secure	73%	69%	74%
Repairs - Overall satisfaction	57%	60%	62%
Grounds maintenance	63%	59%	63%
Neighbourhood as a place to live	82%	81%	78%
Anti-social behaviour	54%	58%	55%
Listens & Acts	50%	51%	48%
Decision making process	41%	50%	43%
Say in how services managed	38%	43%	41%
Trust	68%	66%	72%
Rent - Value for money	69%	65%	70%
Service charge - Value for money	64%	63%	60%
Promoters	45%	45%	45%
Easy to access repairs	73%	76%	77%
Time taken	59%	61%	62%
Quality of work	72%	72%	72%
Right first time	64%	65%	65%
Service received	69%	72%	70%

Base: Carmarthen East and Dinefwr = 495, Carmarthen West and South Pembrokeshire = 185, Llanelli = 570



Age Group

	0 - 24	25 - 34	35 - 44	45 - 54	55 - 59	60 - 64	65 - 74	75 - 84	85+
Overall satisfaction	74%	65%	55%	58%	62%	69%	76%	80%	86%
Quality of home	47%	50%	49%	56%	67%	71%	79%	82%	87%
Safe and secure	57%	63%	61%	66%	67%	76%	83%	88%	95%
Repairs - Overall satisfaction	50%	59%	45%	50%	56%	60%	69%	75%	77%
Grounds maintenance	45%	55%	60%	54%	58%	61%	68%	75%	74%
Neighbourhood as a place to live	57%	67%	78%	71%	81%	87%	86%	91%	94%
Anti-social behaviour	57%	44%	48%	44%	54%	58%	62%	66%	77%
Listens & Acts	29%	33%	39%	43%	47%	55%	54%	68%	71%
Decision making process	43%	38%	36%	33%	43%	42%	49%	57%	56%
Say in how services managed	50%	39%	32%	29%	38%	36%	45%	54%	55%
Trust	62%	59%	59%	61%	67%	70%	80%	86%	86%
Rent - Value for money	57%	62%	62%	57%	56%	75%	78%	86%	84%
Service charge - Value for money	31%	58%	55%	50%	55%	66%	70%	81%	74%
Promoters	36%	31%	40%	40%	42%	48%	53%	56%	61%
Easy to access repairs	60%	69%	67%	71%	74%	83%	83%	88%	82%
Time taken	50%	55%	52%	49%	58%	62%	76%	76%	74%
Quality of work	70%	63%	61%	65%	75%	78%	83%	82%	88%
Right first time	60%	61%	53%	58%	61%	65%	78%	78%	76%
Service received	60%	62%	63%	57%	68%	70%	85%	86%	88%

Base: 0 - 24 = 19, 25 - 34 = 104, 35 - 44 = 124, 45 - 54 = 167, 55 - 59 = 108, 60 - 64 = 126, 65 - 74 = 296, 75 - 84 = 215, 85+ = 87, NO DATA = 4

As mentioned previously, satisfaction generally tends to increase with age, and that is certainly the case here.

The most satisfied tenants are those aged 85 and over, including with the overall service at 86%. This age group and those others above 65 are the most satisfied on all of the measures in the survey.

Least satisfied for the most measures are those aged under 24. Apart from the value for money of the rent, the least satisfied on all measures are below 55 years in age.

This maybe that older tenants are less likely to complain, whilst younger tenants have higher expectations and are quicker to express dissatisfaction if things go wrong.

Whatever the reason for the differences, age is a major factor in determining satisfaction levels.



Length of Tenancy

It is likely that those with the longest tenancies are the older tenants and as shown above these tend to be the most satisfied. In fact, those who have been with the Council for over 20 years are the most satisfied on 12 of the measures.

It also tends to be the case that newer tenants (with tenancies of less than a year) report higher satisfaction than those with longer tenancies. Satisfaction wanes for a time then picks up again as tenants get older.

There is some evidence of this pattern here. However, satisfaction is higher for tenants with tenancies of between 1 and 3 years than tenants with tenancies of less than a year, with an average difference of 5% across all metrics. It is unclear why this is the case.

The least satisfied are those of 6 to 10 years, just 61% satisfied overall.

	< 1 year	1 - 3 years	4 - 5 years	6 - 10 years	11 - 20 years	Over 20 years
Overall satisfaction	73%	73%	63%	61%	63%	72%
Quality of home	64%	70%	61%	58%	59%	74%
Safe and secure	70%	75%	71%	68%	71%	80%
Repairs - Overall satisfaction	60%	65%	56%	52%	56%	67%
Grounds maintenance	60%	62%	59%	66%	58%	66%
Neighbourhood as a place to live	75%	80%	77%	78%	79%	86%
Anti-social behaviour	59%	62%	50%	48%	52%	57%
Listens & Acts	52%	54%	42%	40%	49%	55%
Decision making process	41%	48%	40%	37%	37%	53%
Say in how services managed	40%	49%	36%	31%	37%	46%
Trust	68%	71%	65%	63%	69%	77%
Rent - Value for money	70%	76%	60%	67%	65%	71%
Service charge - Value for money	65%	68%	62%	58%	58%	62%
Promoters	49%	53%	38%	43%	39%	48%
Easy to access repairs	66%	78%	76%	71%	73%	83%
Time taken	61%	69%	53%	55%	55%	68%
Quality of work	69%	78%	68%	62%	71%	82%
Right first time	64%	67%	59%	58%	65%	74%
Service received	68%	73%	70%	61%	69%	77%

Base: < 1 year = 104, 1 - 3 years = 207, 4 - 5 years = 127, 6 - 10 years = 252, 11 - 20 years = 251, Over 20 years = 309



Property Type

The Council principally has three main property types, bungalows, flats and houses, with very small numbers of rooms and maisonettes.

In terms of satisfaction, those in bungalows are consistently more satisfied than those in either the flats or houses.

Whilst bungalows are seen as a desirable type of property, these differences are more likely to be driven by the age of the tenants; older tenants being Younger families, conversely, are more likely to be in houses and there is generally a mix of smaller households in flats.



	Bungalow	Flat	House
Overall satisfaction	73%	67%	65%
Quality of home	76%	72%	56%
Safe and secure	81%	72%	69%
Repairs - Overall satisfaction	70%	57%	55%
Grounds maintenance	68%	60%	59%
Neighbourhood as a place to live	88%	74%	78%
Anti-social behaviour	63%	53%	51%
Listens & Acts	59%	46%	44%
Decision making process	49%	41%	41%
Say in how services managed	43%	41%	38%
Trust	77%	66%	67%
Rent - Value for money	78%	69%	64%
Service charge - Value for money	72%	57%	58%
Promoters	55%	42%	41%
Easy to access repairs	83%	69%	73%
Time taken	74%	56%	56%
Quality of work	80%	69%	69%
Right first time	72%	66%	61%
Service received	80%	68%	66%

Base: Bungalow = 449, Flat = 229, House = 567, Maisonette = 1, Rooms = 4

Number of Bedrooms

	1	2	3	4
Overall satisfaction	68%	71%	61%	75%
Quality of home	73%	68%	58%	61%
Safe and secure	73%	77%	67%	79%
Repairs - Overall satisfaction	59%	65%	53%	58%
Grounds maintenance	62%	64%	59%	73%
Neighbourhood as a place to live	73%	83%	78%	85%
Anti-social behaviour	54%	59%	50%	63%
Listens & Acts	47%	51%	45%	75%
Decision making process	44%	46%	39%	54%
Say in how services managed	43%	42%	36%	45%
Trust	68%	74%	64%	82%
Rent - Value for money	71%	72%	64%	70%
Service charge - Value for money	63%	65%	57%	62%
Promoters	43%	50%	39%	37%
Easy to access repairs	72%	77%	74%	76%
Time taken	59%	66%	56%	36%
Quality of work	74%	74%	70%	55%
Right first time	69%	69%	58%	60%
Service received	74%	74%	64%	61%

Base: 1 = 196, 2 = 625, 3 = 410, 4 = 18, 5 = 1

Contrary to the previous page, those in four-bedroom properties report the highest satisfaction on 9 of the measures. When we look at the age of these respondents, more than half are between the age of 35 and 54, with a third being between 60 and 74. We should note, however, that there were far fewer respondents in four-bedroom properties than other properties, excluding five-bedroom properties where there was just one respondent.

In terms of those in other properties, respondents in two-bedroom properties tend to report higher satisfaction than those in one-bedroom or three-bedroom properties, the latter group being generally the least satisfied throughout and having a greater proportion of younger tenants - 51% are below the age of 55, compared to 26% in two-bedroom properties and 16% in one-bedroom properties.



Service Charge

The results are also split here by those paying a service charge and those not, although relatively few fall into the first category.

The differences between these groups are quite small, just 3% on the overall service, although those not paying a charge are generally a little more satisfied.

However, this does suggest that the payment of service charges alone is not a major factor in determining satisfaction.

As mentioned previously, although a 'not applicable' option was included for the question which asks tenants how satisfied they are with the value for money of service charges, 968 respondents responded to this question, of which just 126 pay service charges. The remaining 842 do not pay service charges.



	Yes	No
Overall satisfaction	64%	67%
Quality of home	75%	64%
Safe and secure	72%	73%
Repairs - Overall satisfaction	59%	60%
Grounds maintenance	66%	62%
Neighbourhood as a place to live	73%	81%
Anti-social behaviour	57%	55%
Listens & Acts	47%	49%
Decision making process	43%	43%
Say in how services managed	44%	40%
Trust	64%	70%
Rent - Value for money	72%	68%
Service charge - Value for money	57%	63%
Promoters	40%	46%
Easy to access repairs	67%	76%
Time taken	57%	61%
Quality of work	71%	72%
Right first time	66%	64%
Service received	70%	70%

Base: Yes = 139, No = 1,111

Gender

Female tenants outnumber their male counterparts by almost two to one, and they are consistently less satisfied. In this respect, this is similar to many other social landlords.

However, again, the differences between the genders are small, just 1% overall which also suggests that gender alone is not a major factor.

	F	M
Overall satisfaction	67%	68%
Quality of home	63%	69%
Safe and secure	72%	74%
Repairs - Overall satisfaction	59%	60%
Grounds maintenance	61%	63%
Neighbourhood as a place to live	79%	82%
Anti-social behaviour	53%	58%
Listens & Acts	49%	49%
Decision making process	42%	46%
Say in how services managed	39%	43%
Trust	69%	72%
Rent - Value for money	68%	70%
Service charge - Value for money	61%	64%
Promoters	44%	48%
Easy to access repairs	78%	69%
Time taken	61%	59%
Quality of work	71%	73%
Right first time	65%	63%
Service received	71%	68%

Base: F = 796, M = 452, N = 2



Response Method

	Online	Postal
Overall satisfaction	64%	69%
Quality of home	57%	69%
Safe and secure	68%	76%
Repairs - Overall satisfaction	54%	63%
Grounds maintenance	59%	64%
Neighbourhood as a place to live	74%	83%
Anti-social behaviour	51%	57%
Listens & Acts	43%	52%
Decision making process	40%	45%
Say in how services managed	37%	42%
Trust	64%	72%
Rent - Value for money	67%	70%
Service charge - Value for money	56%	65%
Promoters	41%	47%
Easy to access repairs	70%	79%
Time taken	55%	64%
Quality of work	65%	76%
Right first time	56%	70%
Service received	65%	73%

Base: Online = 370, Postal = 880

Tenants were given the option to complete the survey either by following a link to an online survey or by returning a postal questionnaire; over twice as many responded by post than online.

It is often in these surveys a survey method bias whereby those who respond online are consistently less satisfied than those who reply by other means. One theory for this is that younger tenants are more likely to respond online, whereas older tenants are more likely to opt to respond by post.

There is evidence of this bias here, with postal respondents on average 8% more satisfied than online respondents across the range of measures. The biggest differences are for the quality of the home (12%), the quality of repairs work (11%) and that repairs work is right first time (14%).

When we look at the ages of respondents who use each method, this shows that 60% of those who used the postal method are over 65, which falls to just 18% for those who respond online. This perhaps confirms this theory and does need to be considered in considering these results and in planning future surveys.





Summary of Results



Satisfaction 2024



Summary of Results

This report presented an analysis of the results based on 1,250 completed surveys between November 2023 and February 2024. Overall, the survey shows some good levels of satisfaction with the services provided by Carmarthenshire County Council. However, satisfaction ranks below the Acuity median for Welsh landlords across all metrics.

On all comparable measures, satisfaction has also fallen since the previous 2021 satisfaction survey, although this mirrors what is happening more widely across the sector. Overall satisfaction is down by 10p.p with even biggest falls for listening to views (down 14p.p) and having a say in managing services (down 15p.p). The average difference is 8p.p.

Two-thirds of tenants are satisfied with the overall service provided by Carmarthenshire County Council (67%), while 22% are dissatisfied. This sits in the middle of the range of measures with the highest satisfaction for the neighbourhood as a place to live (80%) and the ease of accessing the repairs service (75%).

On the other hand, satisfaction is lowest for tenants having a say in how services are managed (40%) and the opportunity to participate in the decision-making process (43%). Both metrics, however, had inflated levels of respondents in the neither satisfied nor dissatisfied category (41-42%). Dissatisfaction was relatively low at 16-18%. The highest levels of dissatisfaction were drawn from the time taken before repairs work started (30%), satisfaction with the overall repairs service (29%) and that the Council listens to tenant views and acts upon them. For overall services, 22% of respondents were dissatisfied.

In addition, 45% would recommend the Council's Housing Services to family and friends, but 32% wouldn't, giving a Net promoter Score (NPS) of 13.

The survey included several open-ended questions which gave tenants the opportunity to expand on their answers and reasons for dissatisfaction. The main theme throughout the report was around the repairs service, principally with tenants wanting work completed quicker, outstanding repairs dealt with and communication and reporting of repairs to improve. Linked to this was the need for some property improvements and for some instances of damp and mould to be addressed.

This report also analysed the ratings by a number of different subgroups. This demonstrated that sheltered tenants are consistently more satisfied than their general needs counterparts as are older tenants, those in bungalows, male tenants and those responding by post. However, there is little difference across the main constituency areas, by length of tenancy, or whether they pay a service charge.

Recommendations

The survey reveals areas of good performance, but it also highlighted some areas where improvements could be made.

The comments made by tenants give insight into what they are most concerned about and will help Carmarthenshire County Council target services that may need some improvement.

Shown opposite are some recommendations that Carmarthenshire County Council may wish to follow up on to help improve satisfaction in the future.



Tenant engagement

Among the lowest satisfaction levels are the opportunities to participate in decision-making (43%) and having a say in managing services (40%), these falling in satisfaction since the previous survey by 9p.p and 15p.p respectively. On these two issues, around two-fifths of tenants gave a neutral response suggesting that some may be unaware of the opportunities that exist, and further publicity is needed. To increase awareness in this area, it is important that information should be accessible to tenants, not just that information should be easy for tenants to *find* but also easy to *understand*.

The Council also asked tenants whether they'd be interested in having their say about the Council's service in one or more of several ways. The most popular method would be for taking part in short online or social media polls, followed by more detailed surveys and discussion groups. However, 50% responded that none of the options given would be of interest to them. The question also included an open-end text box for respondents to state how they would like to be involved, which will be key to review. It may also be worthwhile engaging with tenants in this group, where permission has been given, to explore further how they would like to be involved.

Furthermore, just 49% are satisfied that the Council listens to their views and acts upon them. This measure was found to be one of the key drivers for overall satisfaction, making it a key area for improvement. One crucial starting point may be to reach out to and engage with those tenants who gave permission to be contacted to discuss issues raised in the survey. This can be an opportunity for the Council to demonstrate that it listens to its tenants' views and acts upon them.



Repairs and maintenance

The overall repairs and maintenance service is the key driver for overall satisfaction with the quality and safety of the home also important. Overall satisfaction with repairs is down by 6p.p since the previous survey and the quality of the home is down 10p.p. When asked, tenants cite the time to complete repairs and dealing with outstanding repairs as the main reasons behind the dissatisfaction. Some tenants also mention the quality of work, the communications around the repair and ease of reporting repairs. Some suffer with damp and mould in their homes, and this will be affecting how they feel about its condition and dealing with these issues can have a knock-on effect of delaying other works. However, the Council may wish to review the entire process to ensure repairs are picked up and dealt with quickly and tenants are kept informed of progress and any changes to appointments or work schedules.

Recommendations

The survey reveals areas of good performance, but it also highlighted some areas where improvements could be made.

The comments made by tenants give insight into what they are most concerned about and will help Carmarthenshire County Council target services that may need some improvement.

Shown opposite are some recommendations that Carmarthenshire County Council may wish to follow up on to help improve satisfaction in the future.



Value for money

Given the current cost-of-living crisis and the pressure this puts on household budgets, it is, perhaps, no surprise that satisfaction with the value for money is falling, with the rent this is down by 6p.p and down 9p.p with the value of the service charge. Both these measures now don't compare particularly well with other Welsh landlords, being in the lower and third quartiles respectively. Other surveys suggest that financial pressure can lead to lower satisfaction, so anything the Council can do to help, such as assisting with benefit claims and having a responsible approach to arrears management could help improve satisfaction, as well as providing much needed practical help.



Trust

Trust was the second most influential measure on overall satisfaction. However, 14% of respondents suggested that they didn't trust their Council as a landlord. Similarly, trust with the Council has fallen by 10p.p since the previous survey in 2021. It is difficult to pinpoint exactly what has caused this. However, the growing pressures on landlords (increased costs and scrutiny on their performance, reduced funding, backlog from the pandemic, etc.) and tenants (cost-of-living, etc.) may play a role here which, as we have seen, has also contributed to a general decline in satisfaction across all landlords. It may also be that, given the current climate, tenant expectations of their landlords are changing and, indeed, increasing. Improving trust, therefore, is a difficult task. This is why it is so important that landlords try as much as possible to deliver a consistent service to their tenants across the range of service areas.

This research project was carried out to conform with ISO20252:2019 and the MRS Code of Conduct.

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