

Tenant Satisfaction Survey 2024

Survey Report

MORAY COUNCIL HOUSING SERVICES

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Authored by: Alan Kennedy, Knowledge Partnership

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TABLE A - SUMMARY OF KEY SATISFACTION RESULTS FROM TENANT SATISFACTION SURVEY 2024

<u>Measure</u>	<u>% Tenants satisfied 2015</u>	<u>% Tenants satisfied 2018</u>	<u>% Tenants satisfied 2021</u>	<u>% Tenants satisfied 2024</u>	<u>% all Councils satisfied</u>	<u>% Peer Group satisfied</u>
1-Satisfaction with Council's overall service	80.0%	79.6%	82.8%	81.7%	79.4%	81.3%
3-Satisfaction with being kept informed about services and decisions	77.7%	76.3%	91.3%	83.7%	82.6%	83.2%
5-Satisfaction with opportunities to participate in decision making	60.3%	68.8%	96.2%	74.9%	80.3%	80.7%
7-Satisfaction with quality of home	86.0%	73.9%	82.7%	81.0%	79.0%	81.5%
12-Satisfaction with repairs in last year	79.4%	76.6%	83.7%	78.1%	86.2%	88.1%
13-Satisfaction with contribution of the Council to management of neighbourhood	76.0%	80.3%	89.6%	73.6%	78.5%	80.9%
25-Rating of rent as very good or fairly good value for money	84.0%	83.0%	86.4%	78.0%	78.8%	82.5%

Executive Summary

This tenant satisfaction survey was carried out by Knowledge Partnership on behalf of Moray Council's Housing Service (the Council) using an interviewer led telephone questionnaire. The survey was administered between 11th August 2024 and 7th September 2024 and by the conclusion of the survey period, 1,500 tenants had been surveyed, representing 38.9% of all available sampled tenants.

Overall satisfaction

- Taking everything into account, 81.7% of tenants are satisfied with housing services in 2024. Approx. one in ten tenants (11.0%) are dissatisfied with the Council's service overall. The comparable Council satisfaction figure for 2021 was 82.8% satisfied whilst the Scottish council sector average is 79.4%¹.
- Analysis of the responses for overall tenant satisfaction by property details illustrates some degree of variation, e.g. the most satisfied tenants are those who live in bungalows (86.0% satisfied) and smaller properties (0-1 bed, 85.1%). Conversely, the least satisfied tenants overall live in houses or flats (both 79.7% satisfied) or larger homes (3 or more bed, 74.9%).
- In relation to tenant profile, tenants who are retired (89.2% satisfied overall, single person households (86.3%), and those who are aged 55 plus (85.1%) or have no children at home (83.6%) are amongst the most satisfied with services overall. Amongst the least satisfied tenants overall are those living as two-or-more person households (76.5% satisfied), younger tenants aged 16 to 35 (76.4%) and tenants who are unable to work (74.3%).
- Overall tenant satisfaction by housing market area (HMA) is distributed as follows; Forres HMA (85.1% satisfied), Speyside HMA (82.6%), Elgin HMA (81.9%), Buckie HMA (80.0%), Keith HMA (80.0%) and Cairngorm HMA (57.1% - caution 7 surveys only).

Housing quality

- Most tenants (81.0%) are satisfied with the quality of their home whilst 13.5% are dissatisfied in 2024. The current year satisfaction figure for this measure is approx. 2% points adrift of that found during the 2021 survey (82.7% satisfied). The Scottish council average for housing quality satisfaction is currently 79.0%.
- Housing quality satisfaction is highest for tenants living in smaller properties (0-1 bed, 86.6% satisfied with housing quality) and bungalows (85.9%). Satisfaction on this measure is lowest for tenants who live in houses (77.4%) and larger, 3 or more bed properties (73.5%).
- In relation to tenant profile, satisfaction with housing quality is highest amongst tenants who are retired (92.1% satisfied), live as a single person household (87.4%), are aged 55 plus (87.4%) and have no children at home (85.0%). Conversely, satisfaction is lowest amongst tenants who are aged 16 to 34 (69.7% satisfied), classed as other not working² (68.1%) and tenants whose homes include children (66.9%).
- An analysis of housing quality by housing market area (HMA) shows the following order of satisfaction; Cairngorm HMA (85.7% - 7 tenants only), Forres HMA (83.6%), Elgin HMA (81.6%), Speyside HMA (80.7%), Buckie HMA (80.4%) and Keith HMA (75.5%).

¹ Scottish Housing Regulator ARC average for Scottish Councils (excluding Moray Council) published on 30/8/2024

² Carer, job seeker, student, stay at home e.g. parent

Repairs service

- Amongst tenants whose homes have been repaired in the last year, 78.1% are satisfied with the last repair whilst 17.5% are dissatisfied. In 2021, a larger proportion (83.7%) were satisfied with their most recent property repair. The social housing sector average (which includes landlords' in house transactional repairs data that generally results in higher levels of recorded satisfaction) is 86.2% satisfied.
- Analysis of repairs service satisfaction by HMA and property details shows for example that the most satisfied tenants live in Cairngorm HMA (100.0% satisfied with last repair) and Speyside HMA (81.5%), or in flats (81.1%). The least satisfied tenants live houses (76.4%) or in Buckie HMA (73.6%).
- Based on repairs completed in the last year, the most satisfied tenants are those who are retired (85.9% satisfied) whilst the least satisfied with this service are tenants who are 'other not working' (70.0%).

Damp and mould

- Across all tenants, the proportion whose property has damp and mould is approx. one in four (26.1%).
- Most tenants who are aware of damp and mould in their home have reported this to their landlord (67.8%) and when considering the outcome of this report, over half (56.6%) are waiting on the Council to address this matter whilst 29.1% say that the issue has re-occurred after reporting it.
- For those tenants who have reported damp and mould to the Council, the three main ways in which this problem has presented itself to them are black mould (22.2%), condensation (21.7%) and wet patches on walls or ceilings (19.2%).

Information, participation and contact

- ✓ In 2024, 83.7% of tenants rated 'being kept informed' as good, whilst 8.7% said that the Council was poor on this measure (and 7.7% replied 'neither good nor poor'). Tenant satisfaction with being kept informed has declined somewhat compared to the 2021 survey (91.3% saying good). The latest Scottish council average for keeping tenants informed is 82.6% satisfied.
- Most tenants (63.5%) have read 'Tenants Voice' during the last 12 months (36.5% have not). Of those tenants who have read the newsletter, three quarters (75.1%) said they found it to be useful whilst 18.8% did not and 6.1% responded 'don't know'.
- All tenants were asked if they would read the newsletter if it were sent to them by email rather than post. Across all tenants, 31.5% would be happy to read a digital version of the newsletter whilst 9.4% had no strong view either way (giving a possible digital/email figure of 40.9%). Most tenants however (57.8%) would prefer to stay with the paper version of the newsletter, including 62.9% of those who currently read Tenants Voice.
- The main channel used by tenants to contact the Housing Service is telephone (82.4%), followed by e-mail (9.9%).
- Approx. three in four tenants (74.9%) are satisfied with opportunities to participate in 2024 whilst 7.9% are dissatisfied (17.3% of tenants are neutral on this question answering 'neither-nor'). In 2021, 96.2% of tenants were satisfied on this measure whilst the current Scottish council average is 80.3%. We would note here that the Scotland wide social housing change in the participation indicator between 2021/22 and 2024 is -16.3% (points).
- Tenants who said they were not satisfied with participation were asked to say why this was the case. An example of some of the comments made in relation to this question reflects issues related to not being aware of

participation options and an unwillingness to participate through lack of interest/time or trust in the Council's decision-making process

Rent and cost of living

- Most tenants (78.0%) rate rent as good value for money, whilst 9.3% say that rent is poor value (and 12.7% answered 'neither good nor poor' value). In 2021, 86.4% of tenants rated rent as good value. The latest Scottish council average for this measure is 78.8%.
- Analysis shows that the tenants who tend to be the most positive about rent value live in smaller properties (0-1 bed, 80.6%). The least positive tenants on this measure are those who live in larger homes (3 or more bed, 74.6%).
- In terms of tenant profile, the most positive tenants on rent value are those who are retired (82.8% say that rent is good value), single person households (80.9%) and tenants on rent benefit (80.7%). Conversely, amongst the least positive on this measure are tenants with children at home (75.7% say rent is good value), employed tenants (75.7%), and larger households (two-or-more person households, 74.8%).
- Tenants' rating of rent value for money according to HMA is as follows; Cairngorm HMA (100.0% rating rent as good value), Forres HMA (81.6%), Elgin HMA (80.5%), Speyside HMA (78.6%). Keith HMA (71.8%), and Buckie HMA (71.8%).
- Excluding those tenants whose rent was paid in full using housing benefit or universal credit, 2/3rds (66.0%) said that their rent was affordable whilst 34.0% disagreed with 25.9% saying their rent payments were just about affordable.
- Approx. one third of tenants (34.4%) agree that they have, during the last 12 months, chosen not to put their heating on because they could not afford to. The tenant segments that are most likely to say that they had not put their heating on during the last 12 months include; tenants who are unable to work (45.1% of these tenants), tenants living in Speyside HMA (41.8%), and those with larger, 3 or more bed properties (40.5%).

Neighbourhoods

- Tenants were asked if they were satisfied or dissatisfied with how their landlord managed the neighbourhood they lived in. The results for this enquiry show that 73.6% of tenants are satisfied on this measure whilst 17.9% are dissatisfied. In 2021, 89.6% of tenants were satisfied with 'neighbourhood management' whilst the Scottish council average is 78.5%.
- Satisfaction with neighbourhood management by HMA reveals the following distribution:
 1. Cairngorm HMA (85.7% of tenants satisfied – caution 7 tenants only)
 2. Forres HMA (76.6%)
 3. Elgin HMA (73.9%)
 4. Keith HMA (73.4%)
 5. Speyside HMA (72.4%)
 6. Buckie HMA (71.1%).

Conclusions

The 2024 tenant satisfaction survey indicates that most tenants (81.7%) are satisfied with the overall service they receive from their landlord. In addition, around seven to eight in ten tenants are satisfied with key elements of the housing service such as repairs, quality of home and rent value for money. All tenants were asked to say what the Council's Housing Service was particularly good at and this question elicited the following responses:

Q - What do you think that the Council's housing service is particularly good at?

1. Repairs, especially emergency repairs (15.5%)
2. Responsive, generally in the context of repairs (4.1%)
3. Having good staff/housing officers (2.1%)
4. Communicating well (1.2%).

Possible areas for further investigation

Whilst most tenants have expressed satisfaction with the housing service they receive from the Council, a minority have identified scope for improvement and based on the tenant feedback in these and other areas, we would propose the following as having potential for further investigation:

Housing quality and condition

- All tenants were invited to comment on any improvements that could be made to the quality of their home and the top five responses to this question were:
 - Improve/upgrade the windows (11.9% of all improvement comments)
 - Improve/upgrade the bathroom (10.1%)
 - Improve/upgrade the kitchen (8.9%)
 - Reduce cold/draughts/better insulation (7.0%)
 - Improve/upgrade the boiler/heating system (5.7%).

Repairs

- From the perspective of their last property repair, tenants four main areas for improvement are:
 - Reducing the time it takes to start a repair (12.3% of all improvement comments).
 - Improving the quality of the repair (8.5%)
 - Communication with Council staff (8.1%)
 - Reducing the time to complete a repair (6.9%).

Damp and mould

- Whilst most tenants (67.8%) have reported damp and mould in their home to their landlord approx. one in three (32.2%) have not. This suggests a need to provide tenants with further information on how to report this issue to the Council.

Tenants Voice

- We note that 31.5% of tenants would be happy to read a digital version of Tenants Voice whilst 9.4% had no strong view either way (giving a possible digital/email figure of 40.9%). This may indicate some scope for reducing communication costs by issuing the newsletter by email rather than by post to those four in ten tenants who would prefer this format.

Tenant participation

- We observe that 25.2% of tenants were not satisfied with participation and that this reflected issues related to not being aware of the participation options and an unwillingness to participate, generally because of a lack of interest/time or trust in the Council's decision-making process. In the context of this feedback, there may be a need to provide further information to tenants on participation opportunities and to evidence (to tenants) that engaging in participation can lead to beneficial change.

Cost of living

- Approx. one third of tenants (34.4%) agree that they have, during the last 12 months, chosen not to put their heating on because they could not afford to. The Council therefore may wish to examine ways in which they can promote assistance to tenants to help them heat their homes more easily.

Neighbourhoods

- The three HMAs with the lowest level of neighbourhood satisfaction are Keith, Speyside and Buckie HMAs suggesting some further action is needed to investigate this matter. Across all HMAs the main neighbourhood issues that tenants would like the Council to address are:
 - Maintaining trees, shrubs and grass areas (10.6% of all improvement comments)
 - Dealing with anti-social behaviour (9.3%)
 - Reducing noise (3.4%)
 - Tackling drug use (3.3%)
 - Improving communal areas (3.3%).

Priority issues

- When, at the conclusion of the survey, tenants were asked to suggest any improvements or changes to the service provided by the Council the most frequently mentioned service areas/assets were:
 - Communication/responsiveness (13.7% of all improvement comments)
 - Maintenance/repairs (12.2%)
 - Property repairs (7.9%).
- In addition, when tenants were asked to say what could be done to improve the housing service overall, the three main items identified were communications, repairs and housing condition.

Introduction

This tenant satisfaction survey was carried out by Knowledge Partnership on behalf of Moray Council's Housing Service (the Council) using an interviewer led telephone questionnaire. The survey was administered between 11th August 2024 and 7th September 2024 and by the conclusion of the survey period, 1,500 tenants had been surveyed.

Survey sampling and survey response

The survey sampling frame comprised a stratified sample of approx. 4,000 tenant properties drawn at random from a population comprising all housing units³. Telephone interviewing took place using a proportionate sampling method whereby interviews were administered across different towns, property types and bed numbers. From the initial sample of 4,002 units, 115 tenants declined to be surveyed after issuing the sample warm up letter. This meant that the effective sampling frame for the survey was reduced from 4,002 to 3,887. The adjusted survey response rate based on completing a total of 1,500 interviews using this revised sampling frame is 38.9%.

Response profile

Location

As illustrated in table B, telephone interviews were completed with tenants living in a variety of Housing Market Areas. Most interviews were carried out with tenants living Elgin HMA (49.6%); this compares to 49.6% of all stock in this area.

Table B – Survey interviews and population by Housing Market Area

<u>Location</u>	<u>Interviews</u>	<u>% Interviews</u>	<u>Stock</u>	<u>% Stock</u>
Buckie HMA	315	21.0%	1239	20.1%
Cairngorm HMA	7	0.5%	23	0.4%
Elgin HMA	744	49.6%	3,054	49.6%
Forres HMA	201	13.4%	836	13.6%
Keith HMA	135	9.0%	569	9.2%
Speyside HMA	98	6.5%	433	7.0%
Total	1,500	100.0%	6,154	100.0%

Bed numbers

Tenants living in 2 bed homes were the largest group to take part in the survey (46.7%). This compares to 45.8% of 2 bed properties in all Council stock.

Table C – Survey interviews and population by bed numbers

<u>Number of beds</u>	<u>Interviews</u>	<u>% Interviews</u>	<u>Number of beds</u>	<u>Stock</u>	<u>% Stock</u>
0-1 bed	457	30.5%	0-1 bed	29.1%	1,791
2 beds	700	46.7%	2 beds	45.8%	2,819
3 or more beds	343	22.9%	3 or more beds	25.1%	1,545
Total	1,500	100.0%	Total	100.0%	6,154

³ Comprising 6,154 units

Property type

As illustrated in table D, all property types were included in the survey sample e.g. 19.3% of surveyed tenants lived in flats. This compares to 21.1% of flatted properties in all Council stock⁴.

Table D – Survey interviews and population by property type

<u>Property type</u>	<u>Interviews</u>	<u>% Interviews</u>	<u>Property type</u>	<u>Stock</u>	<u>% Stock</u>
Bungalow	483	32.2%	Bungalow	1,702	27.7%
Flat	290	19.3%	Flat	1,300	21.1%
House	690	46.0%	House	2,986	48.5%
Maisonette	37	2.5%	Maisonette	166	2.7%
Total	1,500	100.0	Total	6,154	100.0%

Heating

Most surveys (79.6%) were completed with tenants living with gas heating arrangements. This compares to 79.1% of all stock being heated with gas.

Table E – Survey interviews and heating type

<u>Heating type</u>	<u>Interviews</u>	<u>% Interviews</u>	<u>Property type</u>	<u>Stock</u>	<u>% Stock</u>
Gas	1,194	79.6%	Gas	4,866	79.1%
Air source heat pump	228	15.2%	Air source heat pump	983	16.0%
Electric	56	3.7%	Electric	204	3.3%
Other heating type	22	1.5%	Other heating type	101	1.6%
Gas	1,500	100.0%	Gas	6,154	100.0%

Tenant profiling

Table F shows that a broad range of tenant age groups took part in the survey and illustrates for example that 13.0% of those responding were aged 16 to 34 years of age, 21.9% were aged 55 to 64 years etc.

Table F – Survey sample by age group

<u>Tenant age</u>	<u>% all surveys</u>	<u>Tenant age</u>	<u>% All surveys</u>
16 to 34	13.0%	65 to 74	18.9%
35 to 44	14.2%	75 plus	17.3%
45 to 54	14.7%	Totals	100.0%
55 to 64	21.9%		

Table G illustrates the break-down of survey responses by household size/type. This shows a wide range of households for example, 19.7% of all surveyed households comprised one adult under 60 years of age, 33.3% comprised one adult aged 60 and over etc. Households containing children represent 22.0% of all households that were surveyed.

⁴ We tested weighted the survey results by property type, but the effect was insignificant

Table G –Survey sample by household size/composition

<u>Household size/composition</u>	<u>% all surveys</u>	<u>Household size/composition</u>	<u>% all surveys</u>
One adult under 60	19.7%	1 adult with children	11.5%
One adult aged 60 or over	33.3%	2 adults with children	8.2%
Two adults both under 60	8.2%	3 or more adults with children	2.3%
Two adults, at least one 60 or over	11.7%	Declined/other	0.4%
Three or more adults 16 or over	4.7%	Totals	100.0%

As set out in table H, most surveyed tenants were either retired (35.0%), working (33.3%), or unable to work (22.5%). This table will add to more than 100% because tenants may have chosen more than one status e.g. part time work and caring.

Table H –Survey sample by tenant status

<u>Status</u>	<u>% all surveys</u>	<u>Status</u>	<u>% all surveys</u>
Retired	35.0%	Not seeking work/at home with children	2.7%
Full time/part time work	33.3%	Carer	2.9%
Unable to work	22.5%	Student/training	0.7%
Job seeker	3.3%	Declined/other	2.9%

Housing benefit status

Just under half of tenants (49.9%) received government assistance to pay their rent whilst 45.5% were not in receipt of any government help to pay their rent (4.6% declined to say).

Report layout

This report sets out tenant feedback on the questions that were posed in the survey. For each section, figures are provided alongside the relevant commentary. In the case of verbatims, these have been reported separately.

Rounding and small data sets

Note that as a result of the way Excel deals with rounding (rounding up all data), some figures in the charts and tables contained within this report may not sum to exactly 100%. To make it easier to read the Excel charts, any figures of less than 3% have been excluded from the chart displays.

Margin of error and weighting

Based on population of 6,154 households⁵, and a response rate of 1,500 completed surveys, the margin of error for the data contained in this survey is +/-1.9%. The data presented in this report is unweighted because the survey sample when measured against the characteristics of bed numbers, location, heating and property type is a close match to the Council's stock and tenant profile on these measures.

Comparisons

Throughout the report we have made comparisons where possible with the Council's previous tenant satisfaction survey (2021⁶) and with the latest Scottish Housing Regulator figures for council landlords published in August 2024.

⁵ Source – brief but includes tenants who would not have been suitable for a survey

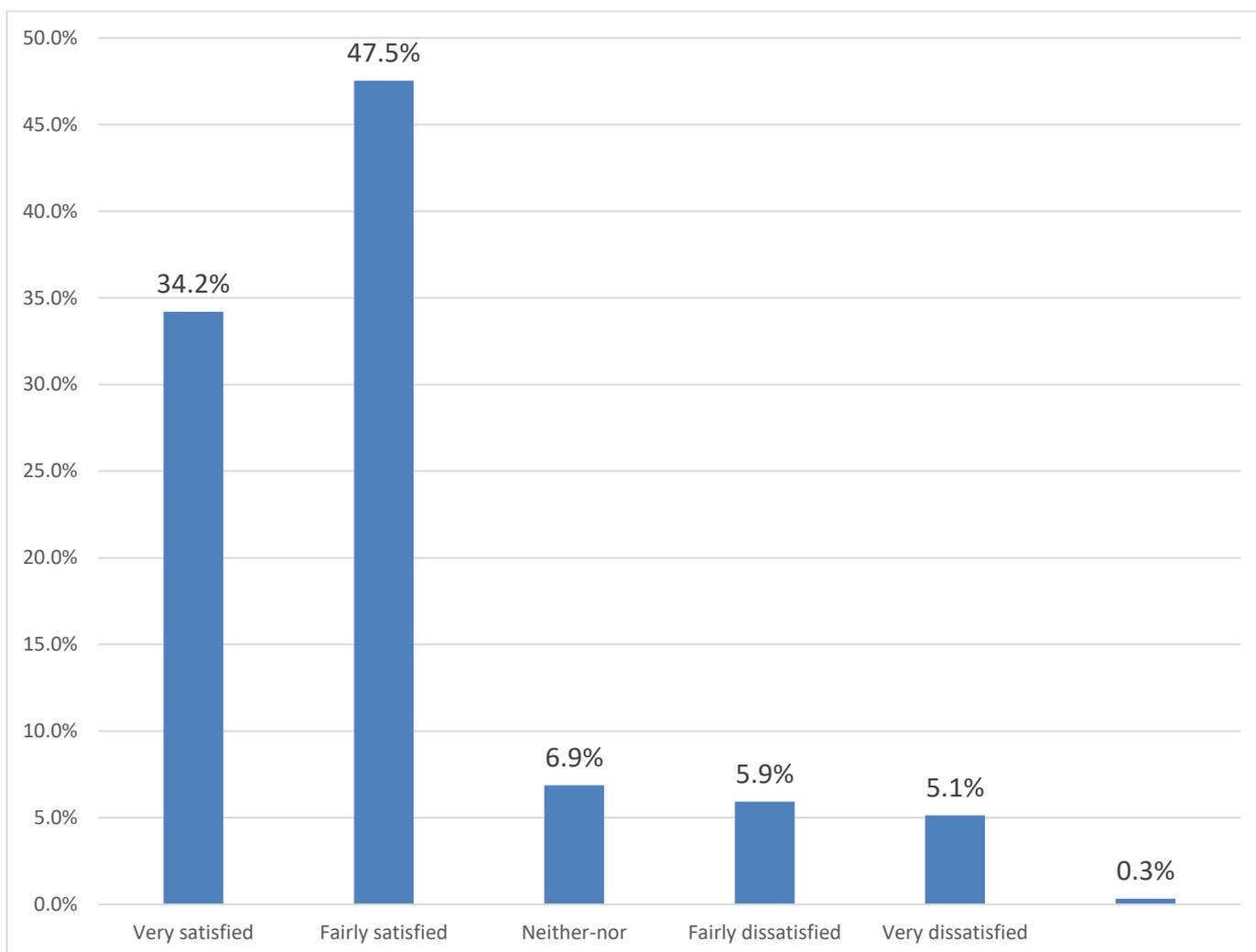
⁶ Data source for the 2021 results is the 2021 survey report

Overall tenant satisfaction

Figure 1 sets out the level of tenant satisfaction with the overall service provided by Moray Council's Housing Service (the Council) and illustrates that 81.7% of tenants are satisfied in 2024. Approx. one in ten tenants (11.0%) are dissatisfied with the Council's service overall. The comparable Council satisfaction figure for 2021 was 82.8% satisfied whilst the Scottish council sector average is 79.4%⁷.

Figure 1 –Satisfaction with the overall service provided by Moray Council (base 1,500)

Q-Taking everything into account, how satisfied or dissatisfied are you with the overall service provided by Moray Council as your landlord?



Observations on 2024 satisfaction level

The 2024 survey results indicate that the overall tenant satisfaction level has declined somewhat when compared to the one achieved in 2021. In our view, this is likely to be due in part to factors others than the performance of the Housing Service i.e.

1. Comparing 2021/2022 (the post Covid period), and 2024, all ARC satisfaction data produced by the Scottish Housing Regulator indicates that for councils, there has been a decline in overall tenant satisfaction of 7.7% points. In addition, all other tenant satisfaction indicators have declined when comparing 2021/2022 with 2024 data e.g. satisfaction with neighbourhood management has dipped by 15.9% points between these two

⁷ Scottish Housing Regulator ARC average for Scottish Councils (excluding Moray Council) published on 30/8/2024

periods. In the context of declining satisfaction across the local authority sector in Scotland, the Council's reduction in satisfaction since the last survey may not be as stark as first appears.

2. Across the social housing sector, there is recognition that whereas tenant expectations have increased post Covid, the cost pressures on councils and housing associations/coops, as well as changes to the supply side have created a situation where landlords are expected to do 'more with less'. Therefore, at a time when tenant demand on the Council's housing services are increasing, the capacity of the organisation to deliver against these is likely to be reducing.

Points 1-2 above suggest some of the potential reasons for the decline in overall tenant satisfaction since the last survey in 2021. This is not to say that there may not have been systemic dips in performance, but rather to provide for an additional set of reasons that could explain why the survey results have changed. In the following paragraphs we consider how overall tenant satisfaction varies by customer segment as this may offer an additional perspective on the reasons for the change in results between 2021 and 2024.

Property details

Analysis of the responses for overall tenant satisfaction by property details (table 1) illustrates some degree of variation, e.g. the most satisfied tenants are those who live in bungalows (86.0% satisfied) and smaller properties (0-1 bed, 85.1%). Conversely, the least satisfied tenants overall live in houses or flats (79.7% satisfied) or in larger homes (3 or more bed, 74.9%).

Table 1 - Overall satisfaction by property details (base 1,500)

Q-Taking everything into account, how satisfied or dissatisfied are you with the overall service provided by Moray Council as your landlord?

<u>Property details</u>	<u>Very satisfied</u>	<u>Fairly satisfied</u>	<u>Neither-nor</u>	<u>Fairly dissatisfied</u>	<u>Very dissatisfied</u>	<u>No opinion</u>
0-1 bed	37.4%	47.7%	5.3%	4.4%	4.8%	0.4%
2 beds	36.0%	46.9%	5.9%	5.9%	5.0%	0.4%
3 or more beds	26.2%	48.7%	11.1%	8.2%	5.8%	0.0%
Bungalow	40.0%	46.0%	4.3%	5.2%	4.3%	0.2%
Flat	34.1%	45.6%	7.9%	4.5%	7.2%	0.7%
House	30.1%	49.6%	8.0%	7.2%	4.8%	0.3%
Maisonette	35.1%	45.9%	10.8%	2.7%	5.4%	0.0%
Total	34.2%	47.5%	6.9%	5.9%	5.1%	0.3%

Tenant profile

Table 2 illustrates tenant satisfaction by profile and shows that tenants who are retired (89.2% satisfied overall), single person households (86.3%), and those who are aged 55 plus (85.1%) or have no children at home (83.6%) are amongst the most satisfied with services overall. Amongst the least satisfied tenants overall are those living as two-or-more person households (76.5% satisfied), younger tenants aged 16 to 35 (76.4%) and tenants who are unable to work (74.3%).

Table 2 - Overall satisfaction by tenant profile (base 1,500)

Q- Taking everything into account, how satisfied or dissatisfied are you with the overall service provided by Moray Council as your landlord?

Tenant profile	<u>Very satisfied</u>	<u>Fairly satisfied</u>	<u>Neither-nor</u>	<u>Fairly dissatisfied</u>	<u>Very dissatisfied</u>	<u>No opinion</u>
16 to 34	28.2%	48.2%	12.3%	4.6%	5.6%	1.0%
35 to 54	29.3%	48.0%	8.8%	6.9%	6.9%	0.0%
55 plus	38.0%	47.1%	4.7%	5.7%	4.1%	0.3%
Children in home	26.1%	49.1%	10.3%	7.9%	6.4%	0.3%
No children in home	36.4%	47.2%	5.8%	5.4%	4.8%	0.3%
Single person household	39.0%	47.3%	4.9%	4.3%	4.2%	0.4%
Two-or-more person household	28.6%	47.9%	9.0%	7.9%	6.3%	0.3%
Employed	29.9%	52.2%	8.1%	5.8%	4.0%	0.2%
Retired	42.2%	47.0%	2.9%	3.5%	3.9%	0.6%
Unable to work	31.4%	42.9%	7.2%	10.3%	7.8%	0.3%
Other not working	25.0%	45.8%	12.5%	6.9%	9.7%	0.0%
Pay full rent	31.6%	52.0%	6.7%	5.7%	3.7%	0.3%
Rent benefits	36.1%	45.5%	6.0%	5.9%	6.1%	0.4%
Total	34.2%	47.5%	6.9%	5.9%	5.1%	0.3%

Housing market area

Overall tenant satisfaction by housing market area (HMA) is set out in table 3 and illustrates the following order of satisfaction: Forres HMA (85.1% satisfied), Speyside HMA (82.6%), Elgin HMA (81.9%), Buckie HMA (80.0%), Keith HMA (80.0%) and Cairngorm HMA (57.1% - caution 7 surveys only).

Table 3 - Overall satisfaction by housing market area (base 1,500)

Q-Taking everything into account, how satisfied or dissatisfied are you with the overall service provided by Moray Council as your landlord?

HMA	<u>Very satisfied</u>	<u>Fairly satisfied</u>	<u>Neither-nor</u>	<u>Fairly dissatisfied</u>	<u>Very dissatisfied</u>	<u>No opinion</u>
Buckie HMA	31.7%	48.3%	8.3%	6.3%	4.8%	0.6%
Cairngorm HMA	57.1%	0.0%	28.6%	14.3%	0.0%	0.0%
Elgin HMA	34.1%	47.8%	6.6%	5.9%	5.2%	0.3%
Forres HMA	41.3%	43.8%	3.0%	5.5%	6.0%	0.5%
Keith HMA	30.4%	49.6%	8.1%	5.9%	5.9%	0.0%
Speyside HMA	31.6%	51.0%	9.2%	5.1%	3.1%	0.0%
Total	34.2%	47.5%	6.9%	5.9%	5.1%	0.3%

Service strengths

Tenants were asked to say what the Council's Housing Service was good at. Across all tenants, around one in three (35.1%) found this question difficult to answer responding 'Nothing I can think of' or 'Don't know/unsure'. Of the comments made that were examples of the service working well, the more frequently mentioned items were:

Q - What do you think that the Council's housing service is particularly good at?

- ✓ Being good repairs, especially emergency repairs (15.5%)
- ✓ Being responsive, generally in the context of repairs (4.1%)
- ✓ Having good staff/housing officers (2.1%)
- ✓ Communicating well (1.2%).

The full list of tenant comments relating to this question are supplied at annex 1.

Improving the service overall

All tenants were invited to say what if anything should be done to improve the Council's housing service overall. The results of this enquiry are set out in figure 2.

Figure 2 indicates that from the comments made by tenants, the most frequently mentioned improvement items relate to:

1. Improving an aspect of the repair service (which accounts for 17.6% of all comments made at this part of the survey)
2. Improving housing condition and quality, including upgrades (11.3%)
3. Improving communications (9.9%).

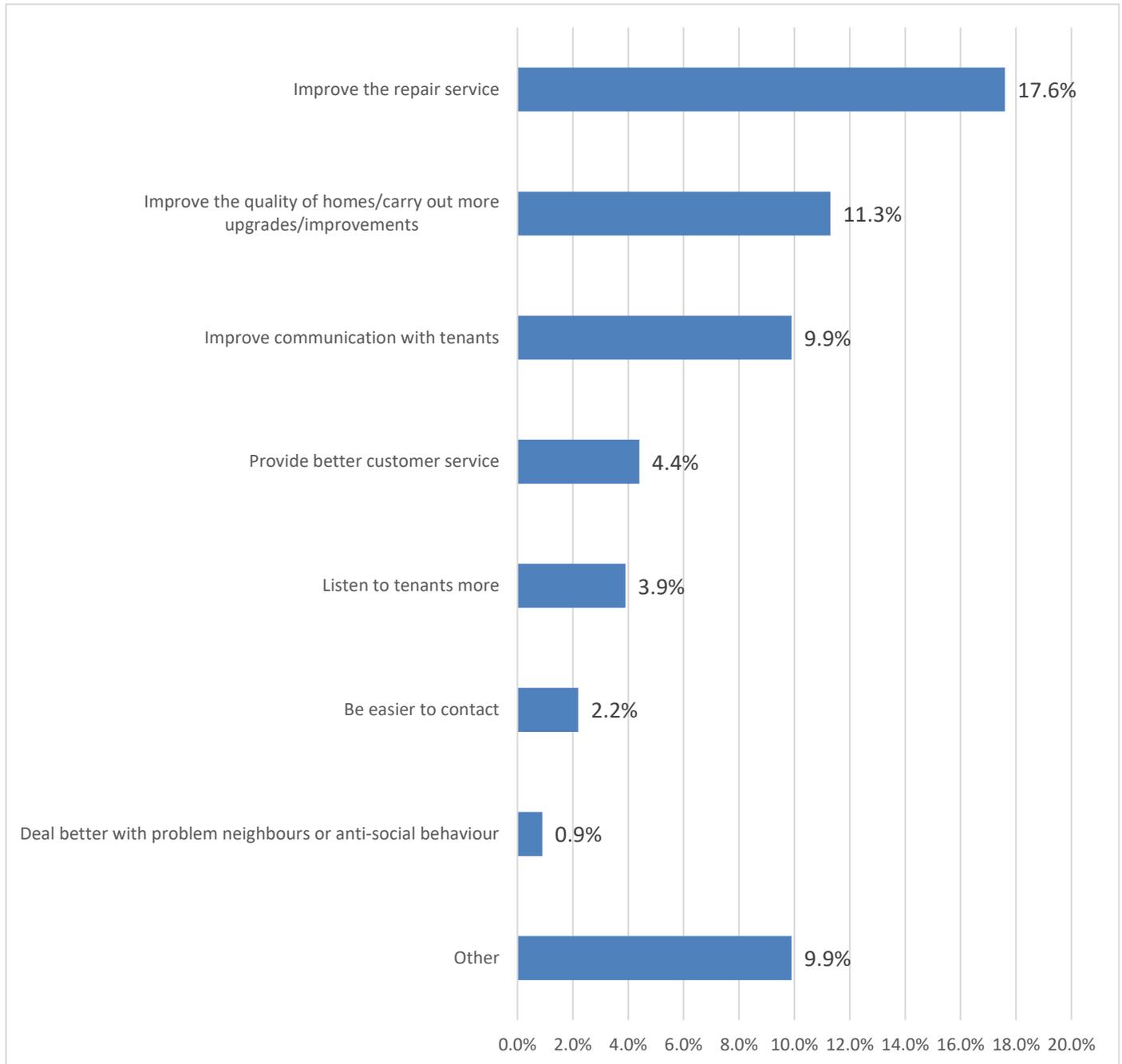
We observe that approximately one in four tenant comments were that nothing needed to be done to improve the service (29.3%) whilst around one in ten comments were 'don't know' (10.6%).

Amongst the other improvement comments made, the most frequently mentioned themes were responsiveness and follow-up, allocations, inspections, rent levels/increases, adaptations, landscaping and grass cutting.

A full list of all the improvement comments made in relation to this theme are provided at annex 2.

Figure 2 –Improving the housing service provided by Moray Council (base 1,867 comments)

Q- What if anything should the housing service do to improve its overall service?

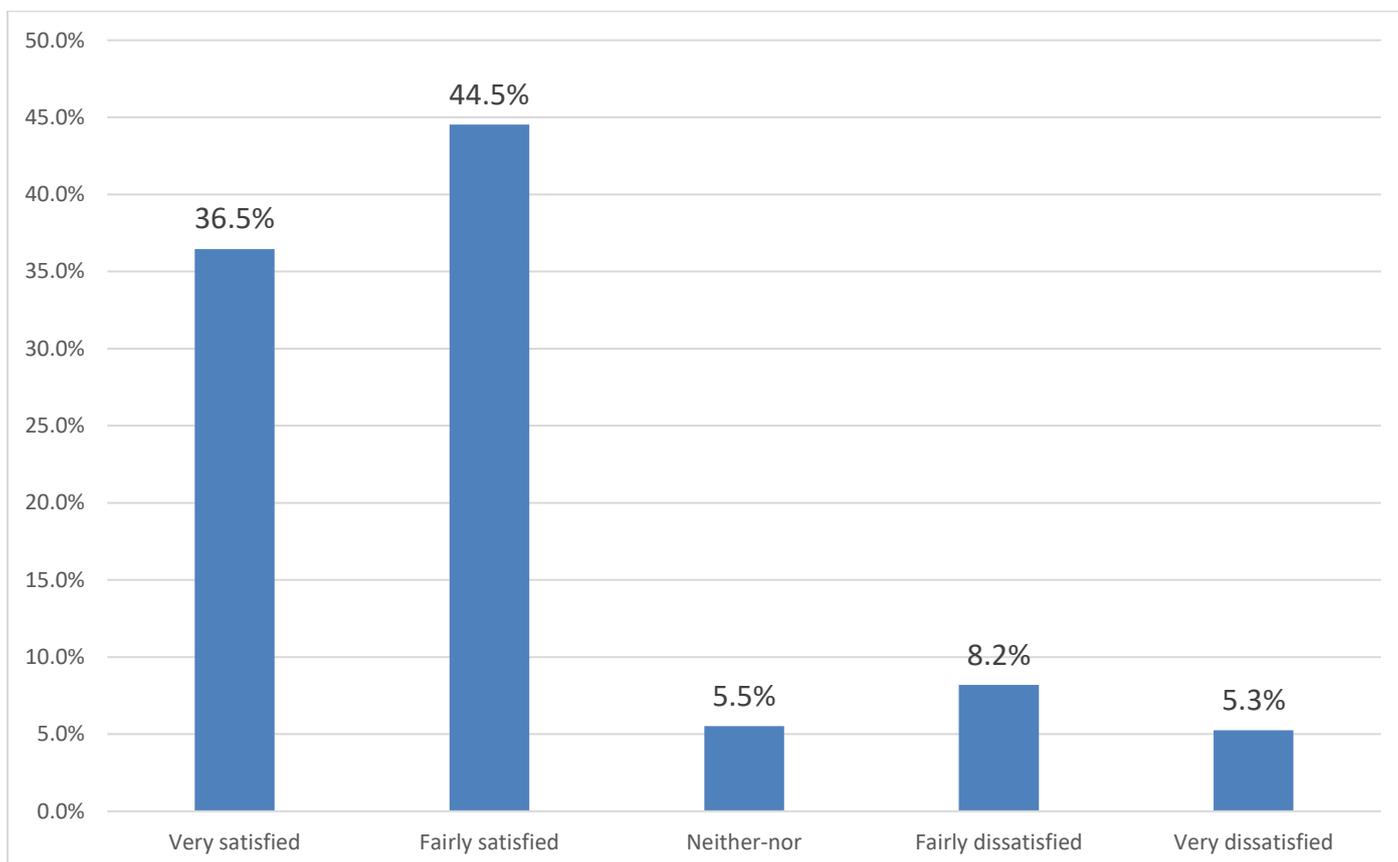


Housing quality satisfaction

Tenant satisfaction with the quality of housing is set out in figure 3 and reveals that 81.0% of tenants are satisfied with their home whilst 13.5% are dissatisfied in 2024. The current year satisfaction figure for this measure is approx. 2% points adrift of that found during the 2021 survey (82.7% satisfied). The Scottish council average for housing quality satisfaction is currently 79.0%.

Figure 3 –Satisfaction with housing quality (base 1,500)

Q- Overall, how satisfied or dissatisfied are you with the quality of your home?



Housing quality satisfaction is highest for tenants living in smaller properties (0-1 bed, 86.6% satisfied with housing quality) and bungalows (85.9%). Satisfaction on this measure is lowest for tenants who live in houses (77.4%) and larger, 3 or more bed properties (73.5%).

Table 4 - Satisfaction with housing quality by property detail (base 1,500)

Q- Overall, how satisfied or dissatisfied are you with the quality of your home?

Property detail	Very satisfied	Fairly satisfied	Neither-nor	Fairly dissatisfied	Very dissatisfied
0-1 bed	42.2%	44.4%	5.3%	4.8%	3.3%
2 beds	34.6%	46.4%	4.6%	8.4%	6.0%
3 or more beds	32.7%	40.8%	7.9%	12.2%	6.4%
Bungalow	43.5%	42.4%	4.6%	5.2%	4.3%
Flat	37.6%	43.4%	4.8%	7.9%	6.2%
House	31.2%	46.2%	6.4%	10.4%	5.8%
Maisonette	35.1%	48.6%	8.1%	8.1%	0.0%
Total	36.5%	44.5%	5.5%	8.2%	5.3%

Tenant profile

In relation to tenant profile, table 5 illustrates that satisfaction with housing quality is highest amongst tenants who are retired (92.1% satisfied), live as a single person household (87.4%), are aged 55 plus (87.4%) and have no children at home (85.0%).

Conversely, satisfaction is lowest amongst tenants who are aged 16 to 34 (69.7% satisfied), classed as other not working⁸ (68.1%) and tenants whose homes include children (66.9%).

Table 5 - Satisfaction with housing quality by tenant profile (base 1,500)

Q- Overall, how satisfied or dissatisfied are you with the quality of your home?

<u>Tenant profile</u>	<u>Very satisfied</u>	<u>Fairly satisfied</u>	<u>Neither-nor</u>	<u>Fairly dissatisfied</u>	<u>Very dissatisfied</u>
16 to 34	25.1%	44.6%	8.7%	14.9%	6.7%
35 to 54	29.8%	43.4%	7.2%	10.2%	9.5%
55 plus	42.3%	45.1%	4.0%	5.7%	2.9%
Children in home	24.2%	42.7%	7.6%	16.1%	9.4%
No children in home	39.9%	45.1%	4.9%	5.9%	4.1%
Single person household	42.9%	44.5%	3.9%	4.9%	3.8%
Two-or-more person household	29.2%	44.6%	7.3%	11.9%	7.0%
Employed	28.2%	48.0%	7.4%	11.5%	4.9%
Retired	48.9%	43.2%	2.3%	3.7%	1.9%
Unable to work	34.8%	41.4%	5.6%	9.1%	9.1%
Other not working	26.4%	41.7%	11.1%	11.1%	9.7%
Pay full rent	32.8%	49.2%	5.3%	8.5%	4.2%
Rent benefits	39.7%	41.2%	5.3%	7.8%	6.0%
Total	36.5%	44.5%	5.5%	8.2%	5.3%

Housing market area

An analysis of housing quality satisfaction by housing market area (HMA) is set out in table 6. This shows the following order of satisfaction by housing market area: Cairngorm HMA (85.7%), Forres HMA (83.6%), Elgin HMA (81.6%), Speyside HMA (80.7%), Buckie HMA (80.4%) and Keith HMA (75.5%).

Table 6- Satisfaction with housing quality by housing market area (base 1,500)

Q- Overall, how satisfied or dissatisfied are you with the quality of your home?

<u>HMA</u>	<u>Very satisfied</u>	<u>Fairly satisfied</u>	<u>Neither-nor</u>	<u>Fairly dissatisfied</u>	<u>Very dissatisfied</u>
Buckie HMA	32.1%	48.3%	5.7%	7.9%	6.0%
Cairngorm HMA	57.1%	28.6%	14.3%	0.0%	0.0%
Elgin HMA	36.8%	44.8%	5.0%	9.3%	4.2%
Forres HMA	44.3%	39.3%	5.5%	3.5%	7.5%
Keith HMA	34.8%	40.7%	8.1%	7.4%	8.9%
Speyside HMA	32.7%	48.0%	5.1%	12.2%	2.0%
Total	36.5%	44.5%	5.5%	8.2%	5.3%

⁸ Other not working is job seeker, carer, stay at home/look after home, student/trainee

Improving housing quality

All tenants were invited to say what if anything should be done to improve the housing service overall. The results of this enquiry are set out in figure 4.

Figure 4 indicates that from the comments made by tenants, the most frequently mentioned improvement items relate to:

1. Improve/upgrade the windows (11.9% of all improvement comments)
2. Improve/upgrade the bathroom (10.1%)
3. Improve/upgrade the kitchen (8.9%)
4. Reduce cold/draughts/better insulation (7.0%)
5. Improve/upgrade the boiler/heating system (5.7%).

Approximately one in five tenant comments were that nothing needed to be done to improve the service (18.2%) whilst 4.0% answered 'don't know'.

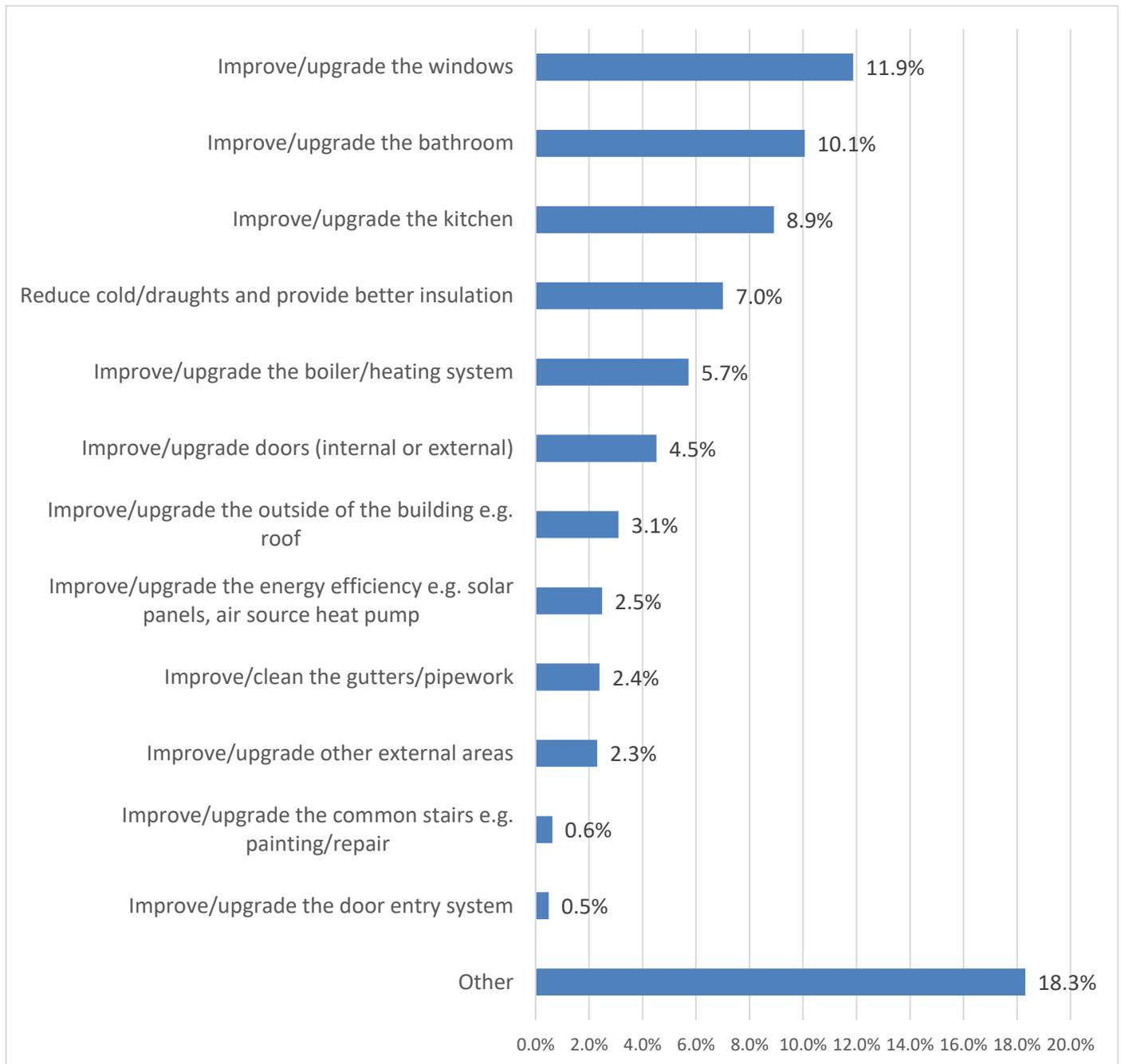
Amongst the other improvement comments made, the components and elements most frequently mentioned were:

- ✓ Damp and mould
- ✓ General maintenance/improvements
- ✓ Adaptations
- ✓ Showers
- ✓ Doors
- ✓ Walls.

A full list of all comments made in relation to this question are provided at annex 3.

Figure 4 –Improving the quality of housing provided by Moray Council (base 2,256 improvement comments)

Q- What if anything should Moray Council do to improve the quality of your home?



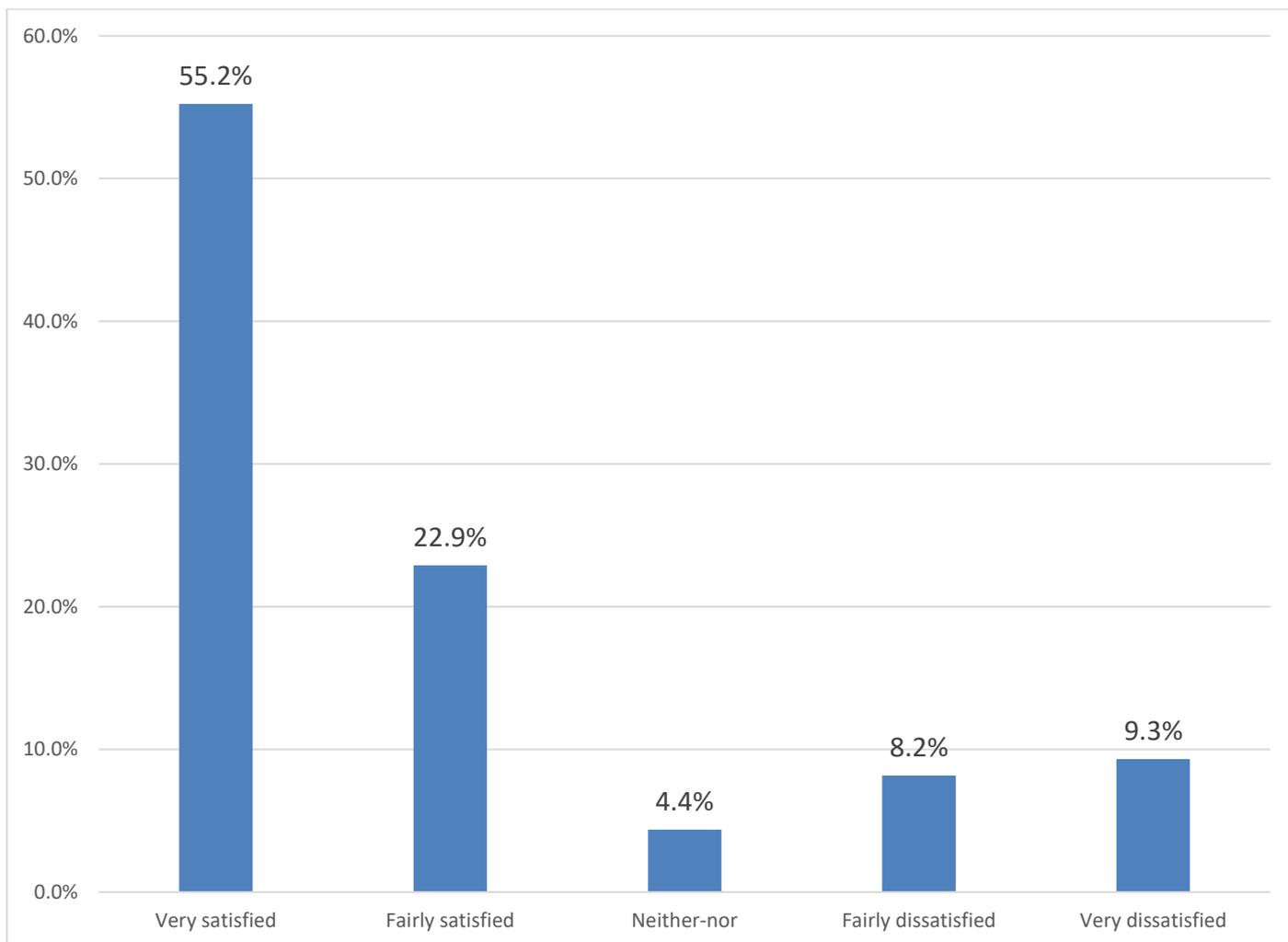
Repair Service

Satisfaction with repairs

Amongst tenants whose homes have been repaired in the last year, 78.1% are satisfied with the last repair whilst 17.5% are dissatisfied (figure 3). In 2021, a larger proportion (83.7%) were satisfied with their most recent property repair. The social housing sector average (which includes landlords' in house transactional repairs data that generally results in higher levels of recorded satisfaction) is 86.2% satisfied.

Figure 5 – Satisfaction with the repair service (base 869-repair in last year only)

Q- Thinking about the last time you had repairs carried out, how satisfied or dissatisfied were you with the repair service provided by Moray Council?



Housing management area and property details

Table 7 illustrates repairs service satisfaction by HMA, and property details and shows for example that the most satisfied tenants live in Cairngorm HMA⁹ (100.0% satisfied with last repair) and Speyside HMA (81.5%), or in flats (81.1%).

The least satisfied tenants live in houses (76.4%) or reside in the Buckie HMA (73.6%).

⁹ Caution – 3 tenants only

Table 7 - Satisfaction with repairs by HMA and property details (base 869-repair in last year only)

Q- Thinking about the last time you had repairs carried out, how satisfied or dissatisfied were you with the repair service provided by Moray Council?

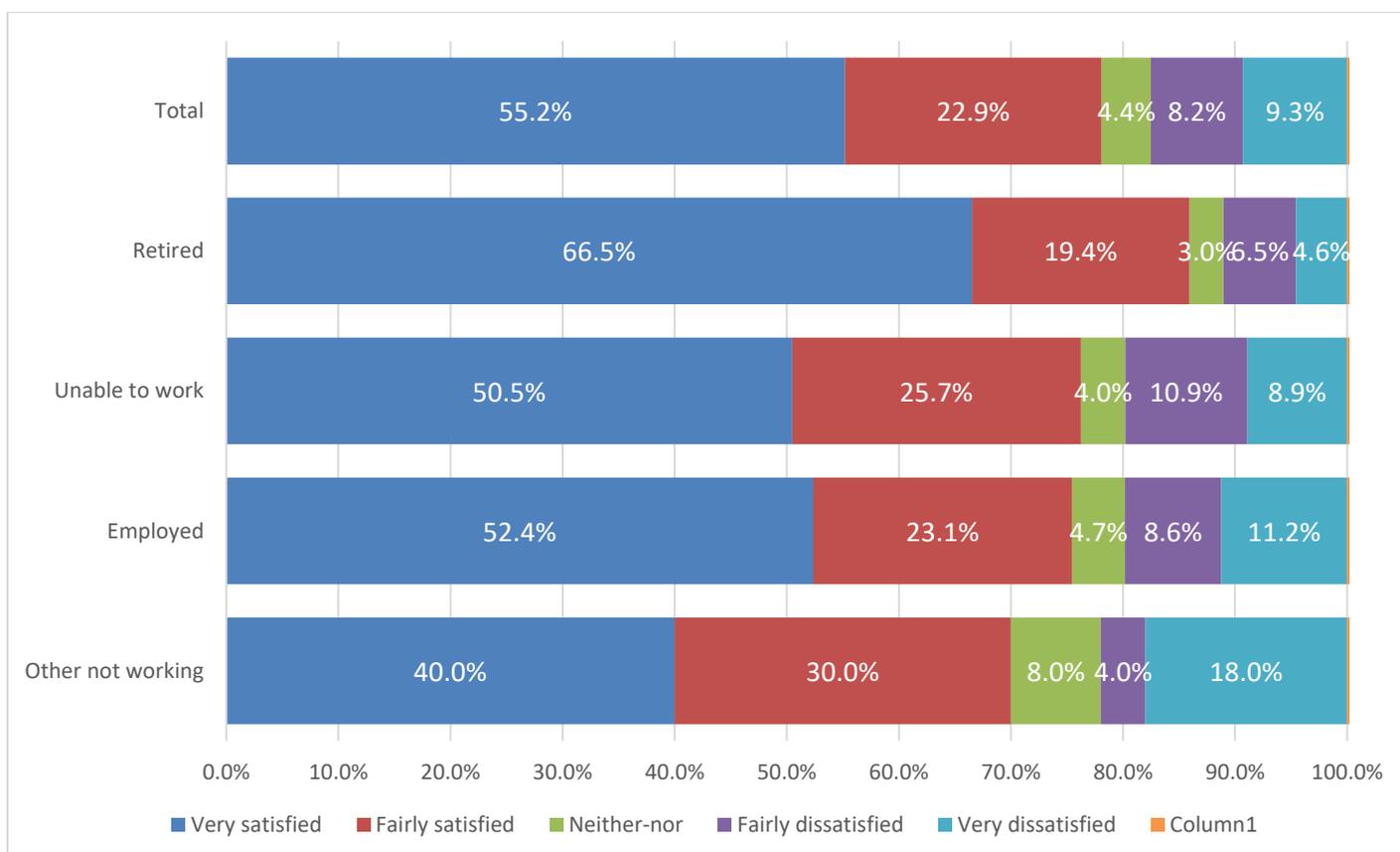
HMA and property detail	Very satisfied	Fairly satisfied	Neither-nor	Fairly dissatisfied	Very dissatisfied
Buckie HMA	54.4%	19.2%	2.6%	10.9%	13.0%
Cairngorm HMA	100.0%	0.0%	0.0%	0.0%	0.0%
Elgin HMA	53.9%	25.2%	6.1%	7.3%	7.5%
Forres HMA	60.5%	19.3%	4.4%	5.3%	10.5%
Keith HMA	56.5%	21.7%	0.0%	11.6%	10.1%
Speyside HMA	53.8%	27.7%	3.1%	7.7%	7.7%
Bungalow	61.1%	17.9%	3.8%	8.8%	8.4%
Flat	59.1%	22.0%	5.5%	7.9%	5.5%
House	50.9%	25.5%	4.2%	8.0%	11.3%
Maisonette	36.8%	42.1%	5.3%	5.3%	10.5%
Total	55.2%	22.9%	4.4%	8.2%	9.3%

Tenant profile

Based on repairs completed in the last year, the most satisfied tenants are those who are retired (85.9% satisfied) whilst the least satisfied with this service are tenants who are 'other not working' e.g. job seekers, stay at home tenants etc (70.0%).

Figure 6 – Satisfaction with the repair service (base 869-repair in last year only)

Q- Thinking about the last time you had repairs carried out, how satisfied or dissatisfied were you with the repair service provided by Moray Council?

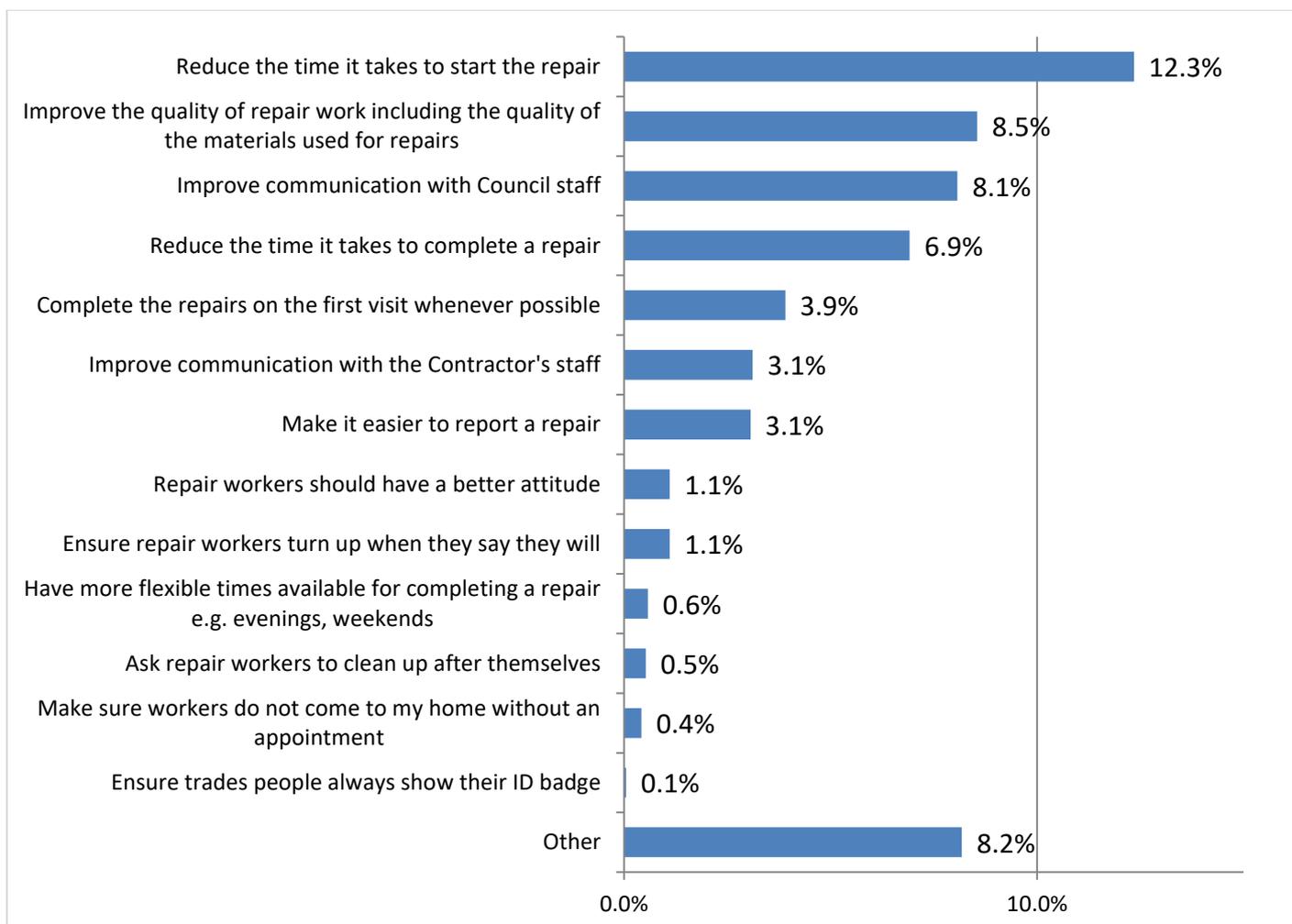


Improving the repair service

All tenants were asked to say what could be improved about the Council's repair service. As illustrated in figure 7, the top four areas for service improvement are reducing the length of time it takes to start a repair (12.3% of all comments), the quality of the repair (8.5%), communication with Council staff (8.1%) mainly comprising keeping tenants updated on a repair, and reducing the time required to complete a repair (6.9%).

Figure 7 – Improving the repair service (base 1,895 improvement responses, all repairs regardless of time frame)

Q- What if anything should your landlord do to improve its repair service?



Other

The other elements of the repair service requiring improvement (8.2%) included:

- ✓ Better coordination of repair service/ trades
- ✓ Completing the repairs requested
- ✓ Tradesmen quality/skills
- ✓ More staff/tradesmen needed
- ✓ Post repair inspections needed
- ✓ More preventative property inspections
- ✓ Ensuring trades return to property after initial visit e.g., returning with parts.

A complete listing of the comments made by tenants in relation to improving the repair service is provided at annex 4.

Damp and mould

Table 8 illustrates tenants' responses to the presence of damp and mould by property factors and location and shows that this problem is most associated with larger homes (3 or more beds, 32.4%), flats (29.7%), and the Speyside HMA (31.6%). We note that 42.9% of tenants in Cairngorm HMA have damp and mould in their property but again we must caution that this figure comprises only 7 tenants.

Across all tenants, the total proportion whose property has damp and mould is approx. one in four (26.1%).

Table 8 – Awareness of damp and mould (base 1,500)

Q- Are you aware of any damp and mould in your property?

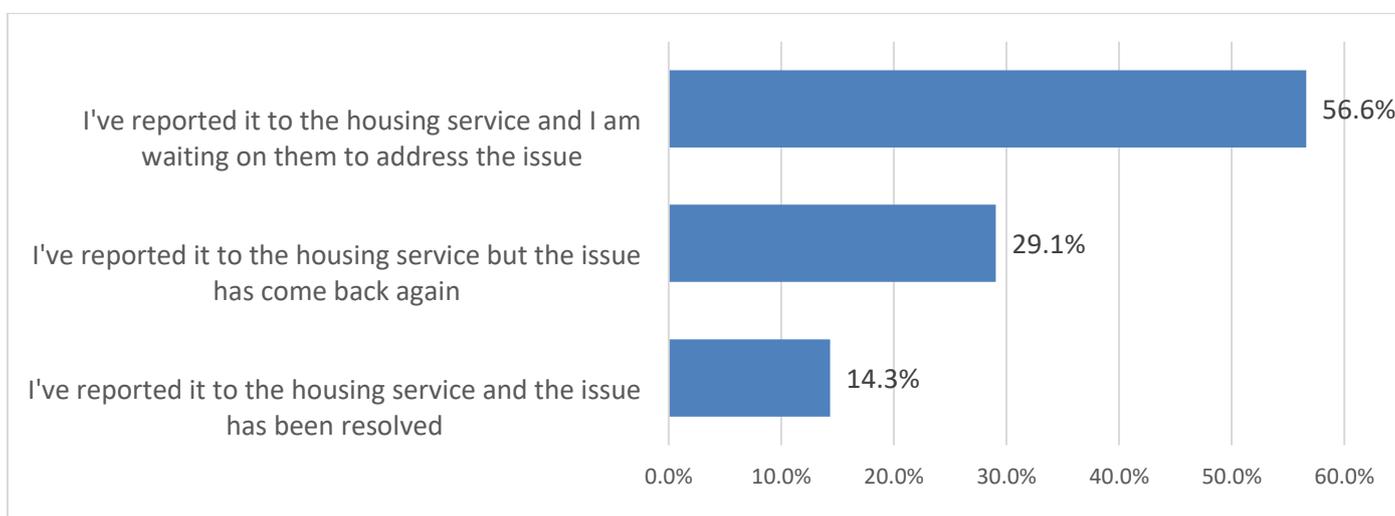
<u>Property and HMA</u>	<u>Yes</u>	<u>No</u>	<u>Don't know</u>
0-1 bed	25.8%	72.4%	1.8%
2 beds	23.1%	75.9%	1.0%
3 or more beds	32.4%	66.5%	1.2%
Bungalow	26.3%	72.0%	1.7%
Flat	29.7%	70.0%	0.3%
House	24.8%	73.9%	1.3%
Maisonette	18.9%	78.4%	2.7%
Buckie HMA	27.3%	71.1%	1.6%
Cairngorm HMA	42.9%	57.1%	0.0%
Elgin HMA	25.4%	73.3%	1.3%
Forres HMA	22.4%	77.1%	0.5%
Keith HMA	27.4%	71.1%	1.5%
Speyside HMA	31.6%	67.3%	1.0%
Totals	26.1%	72.7%	1.3%

Reporting damp and mould, and related satisfaction

Most tenants who are aware of damp and mould in their home have reported this to their landlord (67.8%) and when considering the outcome of this report, figure 8 shows that over half (56.6%) are waiting on the Council to address this matter whilst 29.1% say that the issue has re-occurred after reporting it.

Figure 8 – Reporting damp and mould (outcome) - (base 265 tenants)

Q- Which of the following statements best describes what has happened with the damp and mould in your property?

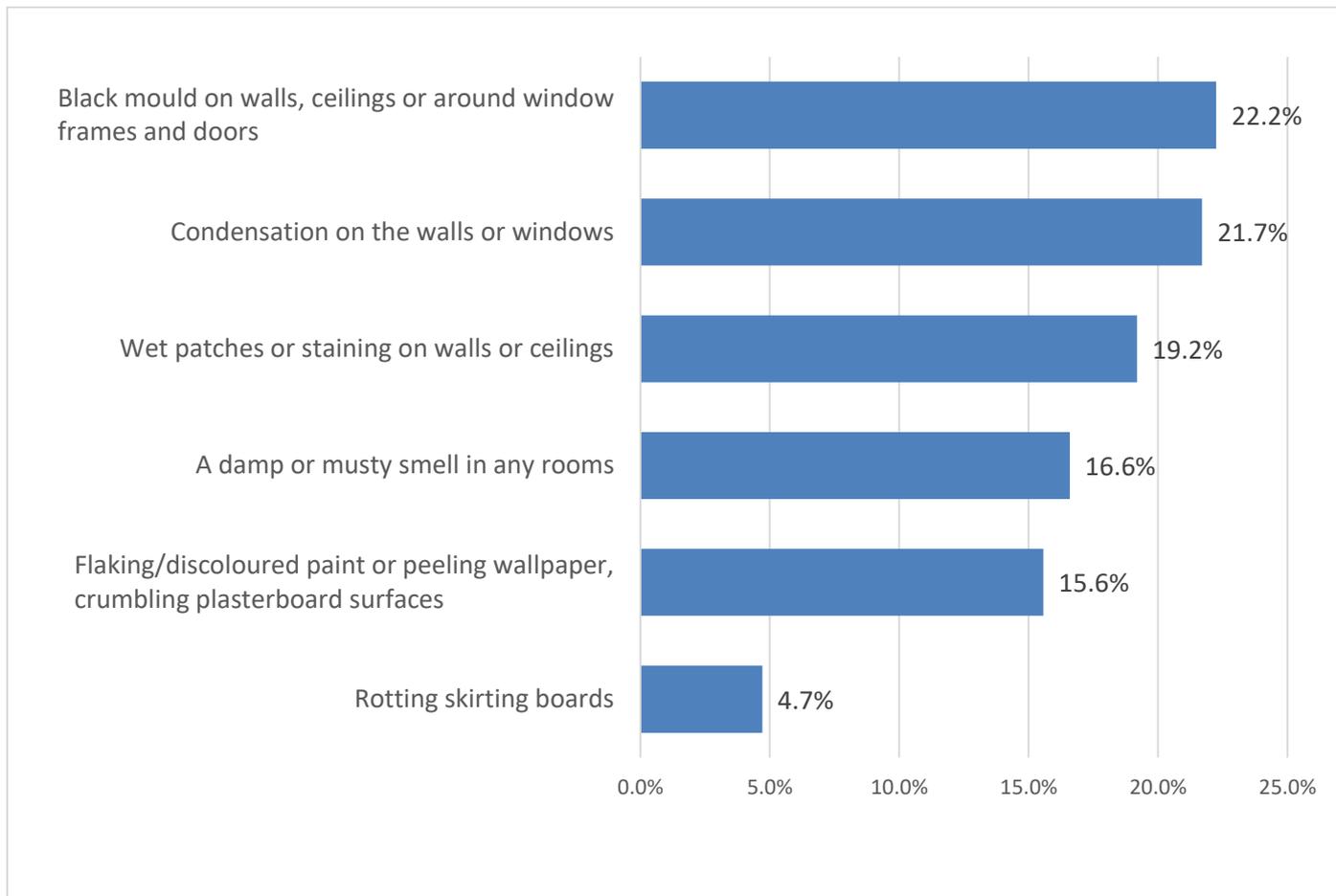


Damp and mould issues

Those tenants (391) who had reported damp and mould to the Council were asked to say how the damp and mould affected their home. As illustrated in figure 9, the three main ways in which damp and mould has presented in tenants' homes are black mould (22.2%), condensation (21.7%) and wet patches on walls or ceilings (19.2%).

Figure 9 – Damp and mould issues (base 1,272 comments made by 391 tenants who have experienced damp and mould)

Q – Which of the following issues have you experienced in relation to any damp or mould in your home?

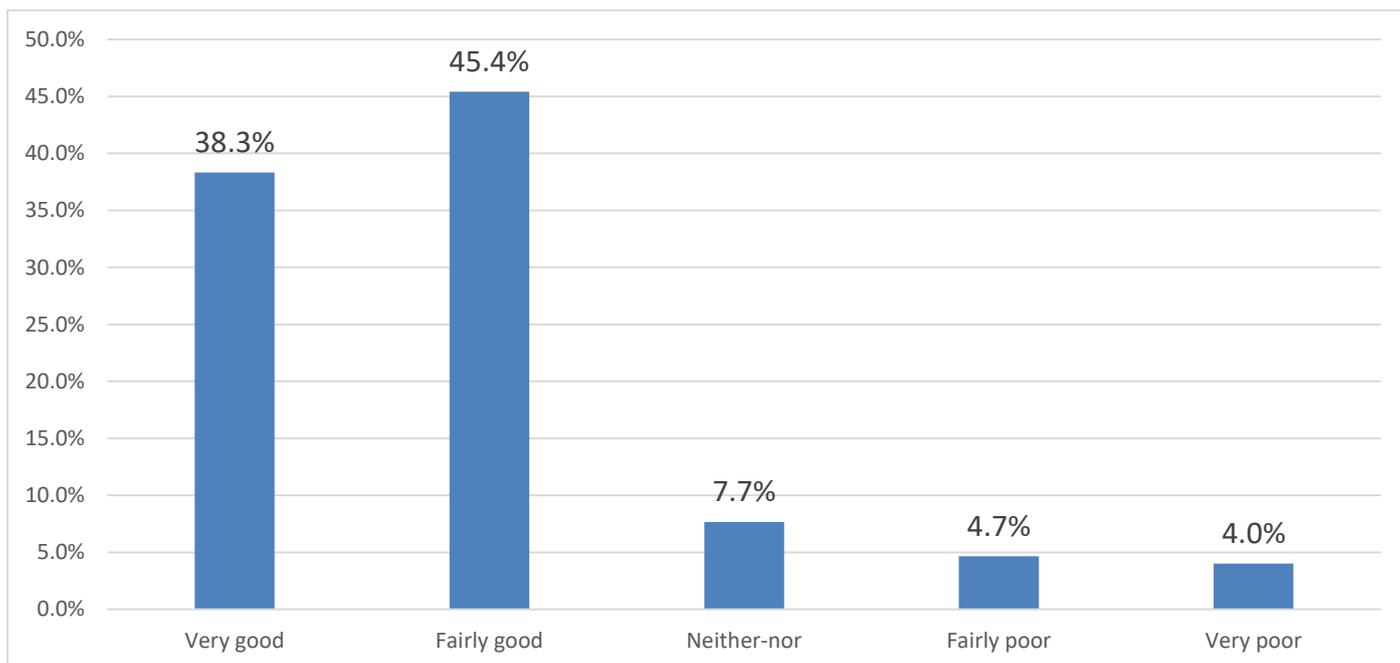


Information, participation and contact

In 2024, 83.7% of tenants rated 'being kept informed' as good, whilst 8.7% said that the Council was poor on this measure (and 7.7% replied 'neither good nor poor') (figure 6). Tenant satisfaction with being kept informed has declined somewhat compared to the 2021 survey (91.3% saying good). The latest Scottish council average for keeping tenants informed is 82.6% satisfied.

Figure 10 – Information (base 1,500)

Q- How good or poor do you feel Moray Council's Housing Service is at keeping you informed about their services and decisions? (This covers how the Housing Service communicates with you through newsletters, social media, the website, annual reports, letters etc.)



Housing newsletter

Most tenants (63.5%) have read 'Tenants Voice' during the last 12 months (36.5% have not). Of those tenants who have read the newsletter, three quarters (75.1%) said they found it to be useful whilst 18.8% did not and 6.1% responded 'don't know'.

For those tenants (18.8%) who did not find Tenants Voice to be useful, the main issues raised were the newsletter content, scope and whether it was value for money. Some example comments setting out why Tenants Voice is not useful are provided below, with the full set of comments set out in annex 5.

Q - If you did not find the newsletter to be useful, why do you say that? (sample comments)

- ✓ Because it's only ever all about good news.
- ✓ Because there is nothing in the newsletter that is relevant to me.
- ✓ Has no bearing on anything I needed to know - just a promotional exercise for the Council which they do very well.
- ✓ I think they could be doing other things rather than spending money on this.
- ✓ It just gives you facts and figures, which are not useful day-to-day for people that live in the houses.
- ✓ Same things every year - nothing new for tenants.
- ✓ They make decisions whether you read it or not.
- ✓ Waste of money; could do better with the money.

Digital newsletter option

All tenants were asked if they would read the newsletter if it were sent to them by email rather than post. As illustrated in table 9, across all tenants, 31.5% would be happy to read a digital version of the newsletter whilst 9.4% had no strong view either way (giving a possible digital/email figure of 40.9%). Most tenants however (57.8%) would prefer to stay with the paper version of the newsletter, including 62.9% of those who currently read Tenants Voice.

Table 9 – Tenants Voice digital (base 1,500)

Q - If an electronic version of Tenants' Voice was to become available, would you prefer to receive it by e-mail rather than in the post?

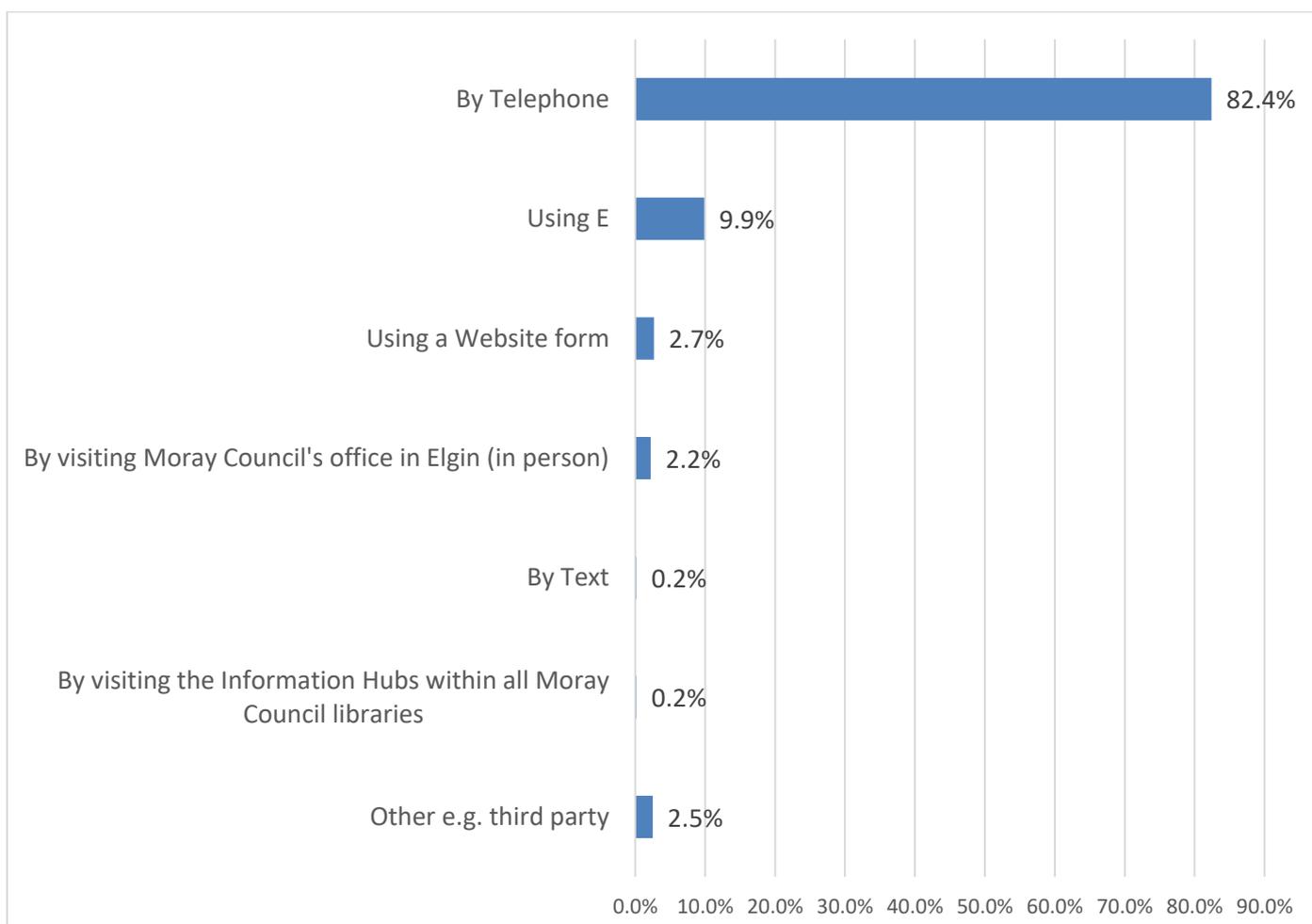
<u>Reading status</u>	<u>Would read email version</u>	<u>Would not read email version</u>	<u>No strong view either way</u>	<u>Don't know</u>
Read last 12 months	29.7%	62.9%	6.9%	0.5%
Not read last 12 months	34.7%	49.0%	13.7%	2.6%
All tenants	31.5%	57.8%	9.4%	1.3%

Contacting the Housing Service

Figure 11 shows that telephone is the contact method most preferred by tenants (82.4%) whilst 9.9% also prefer email. These results are fairly consistent with what we find in other tenant surveys.

Figure 11 – Contact preferences (base 1,683 contact preferences)

Q- When you need to get in touch with the housing service, how do you prefer to do this?

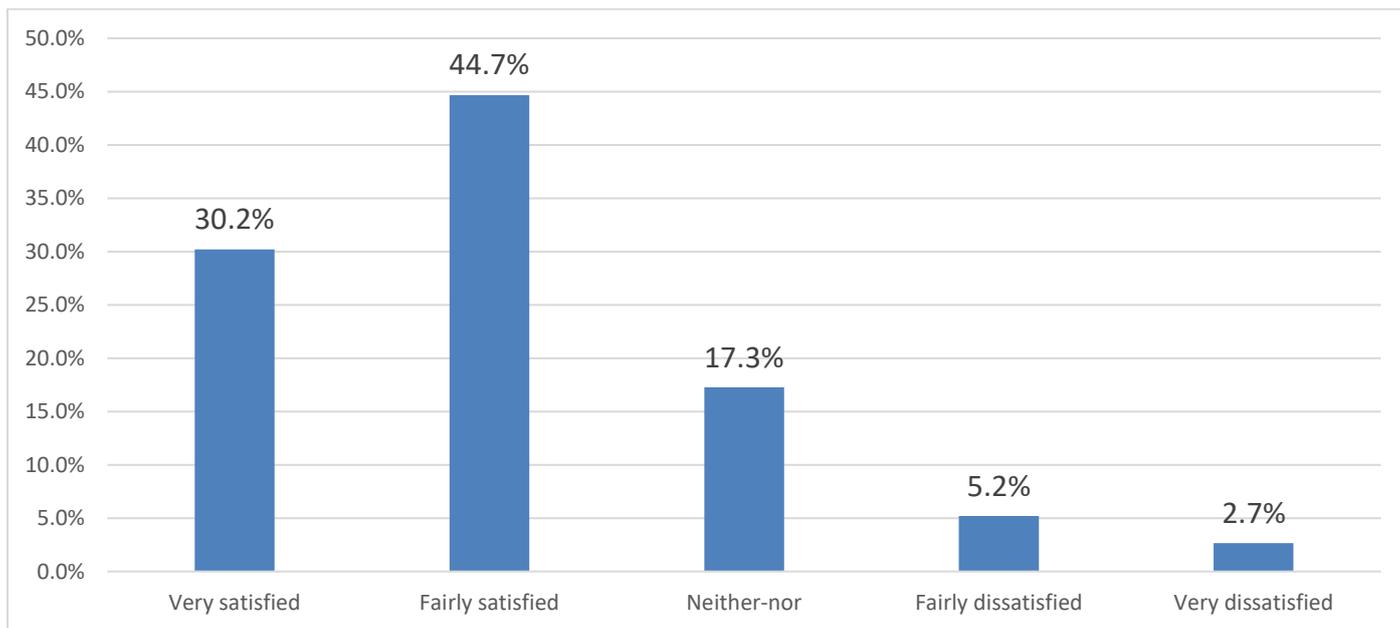


Tenant engagement

As illustrated in figure 12, approx. three in four tenants (74.9%) are satisfied with opportunities to participate in 2024 whilst 7.9% are dissatisfied (17.3% of tenants are neutral on this question answering 'neither-nor'). In 2021, 96.2% of tenants were satisfied on this measure whilst the current Scottish council average is 80.3%. We would note here that the Scotland wide council housing change in this figure between 2021/22 and 2024 is -16.3% points.

Figure 12 –Participation (base 1,500)

Q- Moray Council provides various opportunities for tenants to participate in its decision making. Examples include taking part in a survey or consultation, estate walkabouts, the Moray Council Tenants Facebook group, and tenant events and meetings - either online or in-person. How satisfied or dissatisfied are you with opportunities given to you to participate in the Housing Service's decision-making process?



Housing management area

Analysis of satisfaction with opportunities to participate by housing management area is set out in table 10 and shows an even spread of satisfaction with the highest level in Cairngorm HA (85.7% - 7 tenants only) and the lowest level in Buckie (72.7%).

Table 10– Satisfaction with tenant participation by HMA (base 1,500)

Q - Moray Council provides various opportunities for tenants to participate in its decision making. Examples include taking part in a survey or consultation, estate walkabouts, the Moray Council Tenants Facebook group, and tenant events and meetings - either online or in-person. How satisfied or dissatisfied are you with opportunities given to you to participate in the Housing Service's decision-making process?

<u>HMA</u>	<u>Very satisfied</u>	<u>Fairly satisfied</u>	<u>Neither-nor</u>	<u>Fairly dissatisfied</u>	<u>Very dissatisfied</u>
Buckie HMA	29.2%	43.5%	18.1%	6.3%	2.9%
Cairngorm HMA	28.6%	57.1%	14.3%	0.0%	0.0%
Elgin HMA	30.1%	44.1%	18.1%	4.8%	2.8%
Forres HMA	34.8%	43.3%	14.4%	4.0%	3.5%
Keith HMA	26.7%	51.9%	14.8%	5.2%	1.5%
Speyside HMA	29.6%	44.9%	17.3%	7.1%	1.0%
Totals	30.2%	44.7%	17.3%	5.2%	2.7%

Reasons not to be satisfied

Tenants who said they were not satisfied with participation were asked to say why this was the case and these comments are set out in annex 6.

An example of some of the comments made in relation to this question are provided in table 11 and reflect issues related to not being aware of the participation options and an unwillingness to participate in these through lack of interest/time or trust in the Council's decision-making process.

Table 11– Reasons given to rate participation as 'neither-nor satisfied' or dissatisfied (base 377 tenants)

Q – [In relation to being neutral or dissatisfied with opportunities to participate], why do you say that?

<u>Response</u>	<u>Comment</u>
Neither-nor	Because I have never received anything or taken part.
Neither-nor	Because it's not something I'd be interested in. I don't read the newsletter or anything like that, I just get on with my own thing.
Neither-nor	Don't see the point of these opportunities.
Neither-nor	Don't know; have never been aware of this.
Neither-nor	I didn't know there were any opportunities to participate.
Neither-nor	I don't have a lot of ideas or comments on it really.
Neither-nor	I had never heard of any of these opportunities.
Neither-nor	I haven't heard about a lot of it. I don't know about the opportunities.
Neither-nor	Just not something that really concerns me so neither up nor down.
Neither-nor	Makes no difference to me personally so wouldn't be taking part.
Neither-nor	There are no activities in my part of Moray – everything is in Elgin, nothing in Buckie.
Fairly dissatisfied	Because I shouldn't need to go and do a walkabout. In my opinion that is the council's job to go and walk about people's gardens and estates.
Fairly dissatisfied	Did not realise these things were available to tenants.
Fairly dissatisfied	Didn't even know these things existed.
Fairly dissatisfied	Don't believe tenants' views are taken into account so what's the point e.g. rent increases.
Fairly dissatisfied	I have hardly heard of any of these opportunities before.
Fairly dissatisfied	It's a box ticking exercise. When they are putting out rate increases with options, they always go for the higher option rather than what the public say.
Fairly dissatisfied	Not sure about these things and I wouldn't go to that Facebook meeting.
Fairly dissatisfied	They will hold a meeting and listen to what people have to say, but it's just a farce, as they have already decided what to do before the meeting starts.
Very dissatisfied	I think when you go these kinds of things they've already have made their minds up is what I think.
Very dissatisfied	They don't listen so what's the point of tenants' participating in decisions.

Rent and cost of living

As set out in figure 13, most tenants (78.0%) rate rent as good value for money, whilst 9.3% say that rent is poor value (and 12.7% answered 'neither good nor poor' value). In 2021, 86.4% of tenants rated rent as good value. The latest Scottish council average for this measure is 78.8%.

Figure 13 – Rating of rent value for money (base 1,500)

Q- Taking into account the accommodation and the services the Housing Service provides, to what extent do you think that the rent for this property represents good or poor value for money? Is it.....

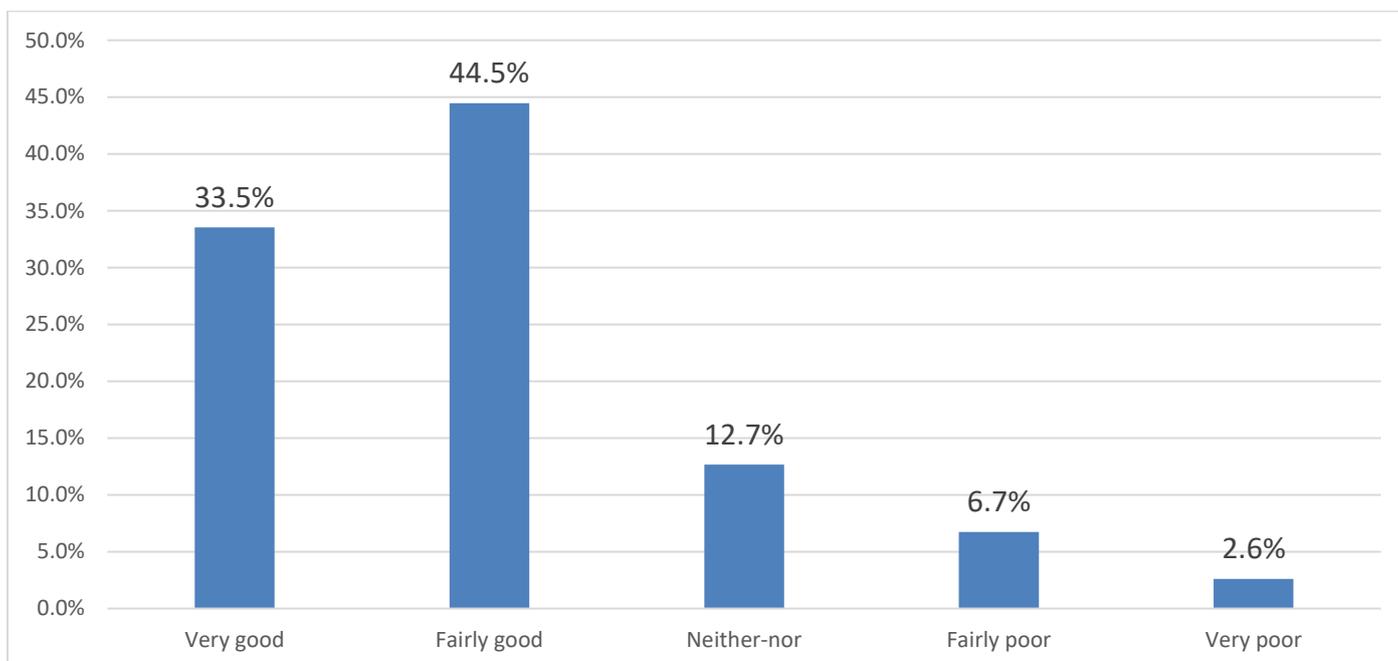


Table 12 indicates rent value by property details. This table shows that the tenants who tend to be the most positive about rent value live in smaller properties (0-1 bed, 80.6%). The least positive tenants on this measure are tenants who live in larger homes (3 or more bed, 74.6%).

Table 12 - Rating of rent value for money by property details (base 1,500)

Q- Taking into account the accommodation and the services the Housing Service provides, to what extent do you think that the rent for this property represents good or poor value for money? Is it.....

Property details	Very good	Fairly good	Neither-nor	Fairly poor	Very poor
0-1 bed	37.9%	42.7%	10.3%	7.7%	1.5%
2 beds	35.4%	42.6%	13.3%	6.3%	2.4%
3 or more bed	23.9%	50.7%	14.6%	6.4%	4.4%
Totals	33.5%	44.5%	12.7%	6.7%	2.6%

In terms of tenant profile, table 13 illustrates that the most positive tenants on rent value are those who are retired (82.8% say that rent is good value), single person households (80.9%) and tenants on rent benefit (80.7%).

Conversely, amongst the least positive tenants on this measure are those with children at home (75.7% say rent is good value), employed tenants (75.7%), and larger households (two-or-more person households, 74.8%).

Table 13- Rating of rent value for money by tenant profile (base 1,500)

Q- Taking into account the accommodation and the services the Housing Service provides, to what extent do you think that the rent for this property represents good or poor value for money? Is it.....

<u>Tenant profile</u>	<u>Very good</u>	<u>Fairly good</u>	<u>Neither-nor</u>	<u>Fairly poor</u>	<u>Very poor</u>
16 to 34	31.3%	47.2%	12.8%	5.6%	3.1%
35 to 54	32.3%	40.6%	15.0%	7.9%	4.2%
55 plus	34.6%	45.8%	11.5%	6.4%	1.7%
Children in home	30.9%	44.8%	12.7%	7.6%	3.9%
No children in home	34.4%	44.3%	12.5%	6.5%	2.2%
Single person household	36.7%	44.2%	11.7%	5.5%	1.9%
Two-or-more person household	30.0%	44.8%	13.6%	8.2%	3.4%
Employed	28.8%	46.9%	12.9%	8.3%	3.1%
Retired	36.4%	46.4%	11.4%	4.2%	1.5%
Unable to work	38.6%	37.3%	13.5%	8.2%	2.5%
Other not working	27.8%	50.0%	11.1%	5.6%	5.6%
Pay full rent	27.7%	48.6%	11.9%	9.5%	2.3%
Rent benefits	38.9%	41.8%	12.4%	4.0%	2.8%
Totals	33.5%	44.5%	12.7%	6.7%	2.6%

Tenants' rating of rent value for money according to HMA is as follows: Cairngorm HMA (100.0% rating rent as good value); Forres HMA (81.6%); Elgin HMA (80.5%); Speyside HMA (78.6%); Keith HMA (71.8%); and Buckie HMA (71.8%).

Table 14- Rating of rent value for money by housing management area (base 1,500)

Q- Taking into account the accommodation and the services the Housing Service provides, to what extent do you think that the rent for this property represents good or poor value for money? Is it.....

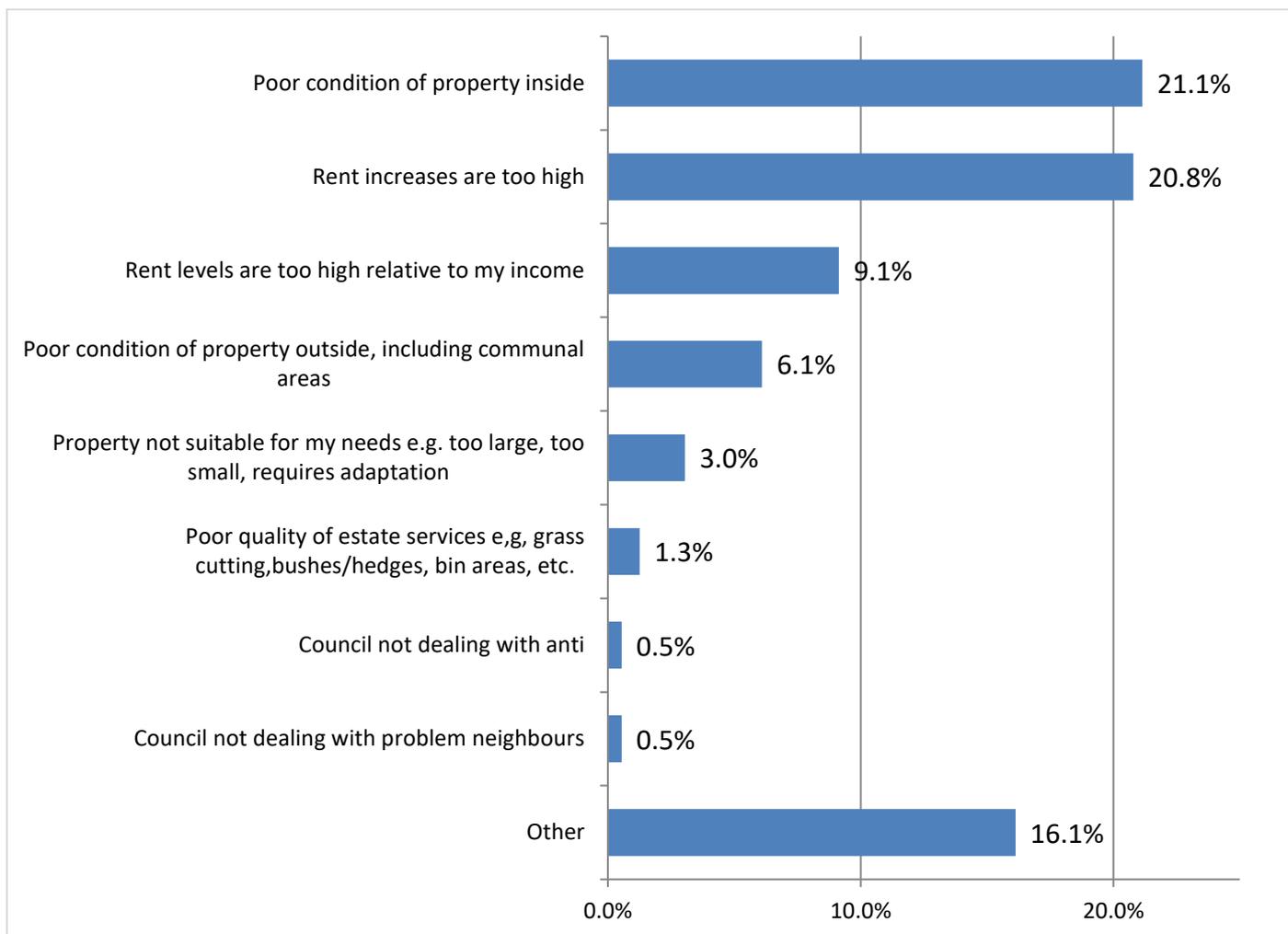
<u>HMA</u>	<u>Very good</u>	<u>Fairly good</u>	<u>Neither-nor</u>	<u>Fairly poor</u>	<u>Very poor</u>
Buckie HMA	28.3%	43.5%	18.4%	7.6%	2.2%
Cairngorm HMA	57.1%	42.9%	0.0%	0.0%	0.0%
Elgin HMA	34.8%	45.7%	11.2%	6.5%	1.9%
Forres HMA	40.3%	41.3%	8.0%	7.5%	3.0%
Keith HMA	29.6%	42.2%	14.8%	6.7%	6.7%
Speyside HMA	30.6%	48.0%	13.3%	5.1%	3.1%
Totals	33.5%	44.5%	12.7%	6.7%	2.6%

Rating rent value as neutral or poor

Those tenants who rated rent value as 'neither good nor poor value' or 'poor value' were asked to say why they had responded to this question in this way. The results of this enquiry are set out in figure 14 and show that the two leading issues are the poor condition of the property (21.1% of all comments) and rents being too high (20.8%). Note that approx. one in four tenants answered 'neither good nor poor value' to the rent value for money question (25.5%) because they did not pay rent i.e., they were in receipt of housing benefits.

Figure 14 – Reasons to rate rent as neither good nor poor or poor value (base 558 comments by 330 tenants)

Q- Why do you say that rent is neither good nor poor or poor value for money?



Other/comments

Other reasons given by tenants for rating rent as neither good nor poor value for money or poor value for money were:

- ✓ Problems relating to damp and mould
- ✓ Issues with the repair service
- ✓ Responsiveness of the service.

The full list of tenant comments made in relation to this question are provided at annex 7.

Rent affordability

Excluding those tenants whose rent was paid in full using housing benefit or universal credit, 2/3rds (66.0%) said that their rent was affordable whilst 34.0% disagreed with 25.9% saying rent payments were just about affordable.

Table 15- Rent affordability (base 802)

Q- How easy or difficult do you find it to afford your rent payments for this property?

<u>Rent status</u>	<u>Very easy to afford</u>	<u>Fairly easy to afford</u>	<u>Just about affordable</u>	<u>Fairly difficult to afford</u>	<u>Very difficult to afford</u>
Receive part housing benefit	16.3%	44.7%	30.5%	7.1%	1.4%
Pay full rent	18.0%	49.0%	25.0%	6.4%	1.7%
All tenants paying rent	17.7%	48.3%	25.9%	6.5%	1.6%

Cost of living

Table 16 illustrates that approx. one third of tenants (34.4%) agree that they have, during the last 12 months, chosen not to put their heating on because they could not afford to.

The tenant segments that are most likely to say that they had not put their heating on during the last 12 months include:

- ✓ Tenants who are unable to work (45.1% of these tenants)
- ✓ Speyside HMA tenants (41.8%)
- ✓ 3 or more bed properties (40.5%)
- ✓ Tenants receiving rent benefits (38.5%)
- ✓ Tenants aged 16 to 34 (38.5%)
- ✓ Tenants aged 35 to 54 (37.9%)
- ✓ Tenants living in houses (37.8%)
- ✓ Tenants with children in home (37.6%)
- ✓ Electrically heated homes (37.5%)
- ✓ Buckie HMA tenants (37.1%)
- ✓ Employed tenants (37.1%).

Table 16- Cost of living and housing (base 1,500)

Q- In the last 12 months, have you ever wanted to put your heating on but chosen not to because you could not afford to?

<u>Segment</u>	<u>Yes</u>	<u>No</u>	<u>Prefer not to say</u>
16 to 34	38.5%	58.5%	3.1%
35 to 54	37.9%	60.0%	2.1%
55 plus	31.8%	65.5%	2.8%
Children in home	37.6%	60.6%	1.8%
No children in home	33.4%	63.7%	2.8%
Single person household	33.3%	64.0%	2.6%
Two-or-more person household	35.5%	61.9%	2.6%
Employed	37.1%	61.5%	1.4%
Retired	26.4%	71.5%	2.1%
Unable to work	45.1%	53.6%	1.3%
Other not working	26.4%	68.1%	5.6%
Pay full rent	30.6%	67.3%	2.0%
Rent benefits	38.5%	60.3%	1.2%

<u>Segment</u>	<u>Yes</u>	<u>No</u>	<u>Prefer not to say</u>
Internet user	38.5%	59.6%	1.9%
Non-user of internet	22.6%	72.7%	4.7%
0-1 bed	31.3%	65.9%	2.8%
2 beds	33.4%	63.3%	3.3%
3 or more bed	40.5%	58.6%	0.9%
Bungalow	31.9%	64.8%	3.3%
Flat	32.1%	66.9%	1.0%
House	37.8%	59.6%	2.6%
Maisonette	21.6%	73.0%	5.4%
Electric	37.5%	60.7%	1.8%
Gas	35.3%	62.1%	2.6%
Other heating type	9.1%	86.4%	4.5%
Air source heat pump	31.1%	66.2%	2.6%
Buckie HMA	37.1%	61.3%	1.6%
Cairngorm HMA	14.3%	85.7%	0.0%
Elgin HMA	32.3%	65.1%	2.7%
Forres HMA	34.8%	63.2%	2.0%
Keith HMA	34.8%	60.7%	4.4%
Speyside HMA	41.8%	54.1%	4.1%
Total	34.4%	63.0%	2.6%

Neighbourhood management satisfaction

Tenants were asked if they were satisfied or dissatisfied with how their landlord managed the neighbourhood they lived in. The results for this enquiry are set out in table 17 and show that 73.6% of tenants are satisfied on this measure whilst 17.9% are dissatisfied. In 2021, 89.6% of tenants were satisfied with 'neighbourhood management' whilst the Scottish council average is 78.5%.

Table 17 also shows satisfaction with neighbourhood management by town and reveals the following distribution:

1. Cairngorm HMA (85.7% of tenants satisfied – caution 7 tenants only)
2. Forres HMA (76.6%)
3. Elgin HMA (73.9%)
4. Keith HMA (73.4%)
5. Speyside HMA (72.4%)
6. Buckie HMA (71.1%).

Table 17 – Neighbourhood management (base 1,500)

Q- Overall how satisfied or dissatisfied are you with your landlord's contribution to the management of the neighbourhood you live in?

<u>HMA</u>	<u>Very satisfied</u>	<u>Fairly satisfied</u>	<u>Neither-nor</u>	<u>Fairly dissatisfied</u>	<u>Very dissatisfied</u>
Buckie HMA	34.3%	36.8%	8.3%	12.1%	8.6%
Cairngorm HMA	57.1%	28.6%	0.0%	0.0%	14.3%
Elgin HMA	34.8%	39.1%	8.1%	9.7%	8.3%
Forres HMA	40.8%	35.8%	8.5%	8.5%	6.5%
Keith HMA	37.8%	35.6%	9.6%	8.9%	8.1%
Speyside HMA	30.6%	41.8%	12.2%	9.2%	6.1%
Total	35.6%	38.0%	8.5%	9.9%	8.0%

Improving the neighbourhood

All tenants were asked to say what might improve their neighbourhood as a place to live.

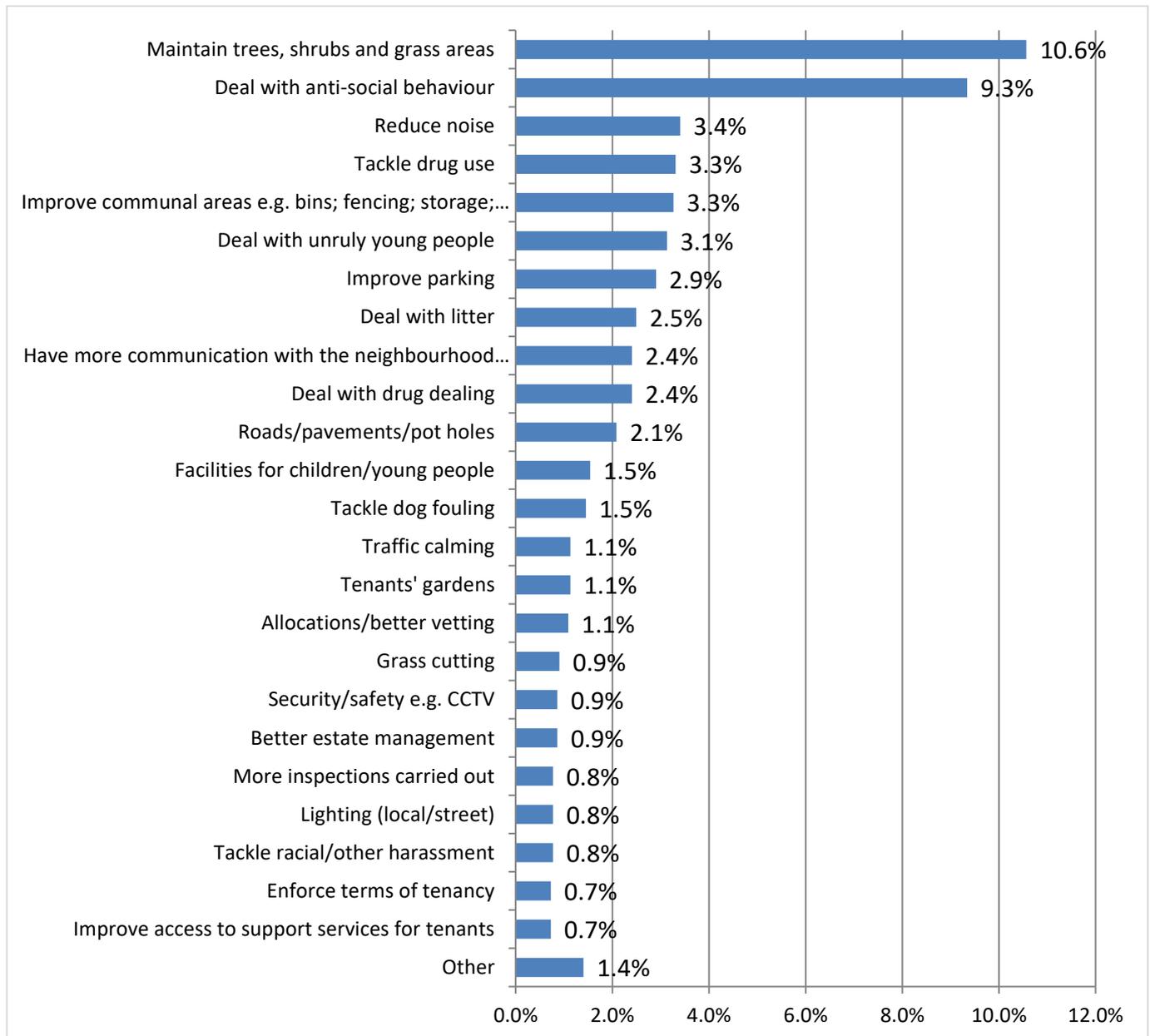
As illustrated in figure 15, tenants are particularly concerned with:

1. Maintaining trees, shrubs and grass areas (10.6% of all tenant comments)
2. Dealing with anti-social behaviour (9.3%)
3. Reducing noise (3.4%)
4. Tackling drug use (3.3%)
5. Improving communal areas (3.3%).

We observe here that approx. one in three comments (32.1%) were that nothing required improvement.

Figure 15 – Improving the neighbourhood (base 2,205 comments)

Q - In your view, what if anything, should be done to improve your neighbourhood as a place to live?



Other neighbourhood issues

A full list of tenant comments made in relation to this question are supplied at annex 8 and include reference to the following themes:

Q - In your view, what if anything, should be done to improve your neighbourhood as a place to live? (other/comments)

- ✓ Bins/rubbish collection
- ✓ Seagulls
- ✓ Drains
- ✓ Fencing
- ✓ More facilities e.g. shops
- ✓ Modernising bin stores.

Tenant Comments

Tenants were asked at the end of the survey if there was anything they wanted to see changed or improved about the housing service. Excluding tenants who had nothing more to add (78.7%) or answered, 'don't know' (0.4%), analysis shows that for the remaining tenants making an improvement suggestion, the 3 key themes were communication/responsiveness (13.7%), maintenance/repairs (12.2%) and property condition (7.9%). The full list of tenant comments made in relation to this item are set out in annex 9.

Figure 16 – Changes or improvements (base 328 tenants making a comment relating to improvement)

Finally, are there any changes or improvements that would you like to see made to the Council's housing service?

