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Who aren't you hearing?

Why representative research matters more than ever for social landlords

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Every satisfaction survey has two results. The first is the score: how satisfied the tenants who took part are. The second is less visible but just as important: who took part, and who didn't.

A landlord can hit its required sample size, publish its Tenant Satisfaction Measures on time and still have heard mostly from the same kinds of tenant: older residents who are at home in the day, people comfortable filling in forms, tenants who are confident online. The tenants it hears least from are often the ones whose experience matters most. They include people with disabilities, families juggling work and childcare, residents who don't speak English as a first language, people who are digitally excluded, and those who have stopped expecting anyone to listen.

This paper explains why representation matters, what the regulator now expects and how landlords can make sure their research reflects every tenant, not just the easiest to reach.

Why it matters now

The regulator's consumer standards put tenants' diverse needs at the centre of what good looks like. The Transparency, Influence and Accountability Standard requires landlords to:

- **Understand diverse needs.** "Understand the diverse needs of tenants, including those arising from protected characteristics", using relevant information and data.
- **Check outcomes are fair.** Assess whether their services "deliver fair and equitable outcomes".
- **Communicate accessibly.** Communicate in a way that is "clear, accessible, relevant, timely and appropriate to the diverse needs of tenants".
- **Give tenants influence.** Give tenants "a wide range of meaningful opportunities to influence and scrutinise" their services.

An updated version of the standard came into force on 1 October 2026.

Inspections show where landlords fall short. The regulator has graded down landlords that held limited information about tenants' diverse needs, or none, and so couldn't show that their services were fair. In its 2025 review it described "poor and incomplete data" as a recurring cause of failure. Recent judgements have also criticised tenant engagement that was "not yet embedded" or didn't reach a representative range of tenants.

A satisfaction survey that over-represents some groups and misses others gives a landlord neither the data it needs nor the assurance its board needs.

Who social landlords serve

Social housing tenants are more diverse in their needs than the population as a whole.

61%

of social renter households include someone with a long-term illness or disability (33% of owner occupiers)

28%

of social renter households are headed by someone aged 65 or over

8.9%

of people in England and Wales have a main language other than English

According to the English Housing Survey 2024/25, the share of social renter households including someone with a long-term illness or disability has risen from 54% in 2019/20. Many more social renters are economically inactive, often because of illness, disability or caring responsibilities. The 2021 Census found around a million people in England and Wales say they can't speak English well or at all, and research suggests digital exclusion is far more common among social tenants than in the wider population.

Each of these groups can be harder to reach with a standard survey. Each is also more likely to rely heavily on their landlord's services.

How surveys can miss people

1

The method shapes who answers

The 2024/25 TSM results show striking differences by survey method. Average overall satisfaction was 80.2% for postal surveys and 60.1% for online surveys. Some of that difference is about how people answer different methods. Some is about *who* answers them. An online-only survey will under-represent older and digitally excluded tenants. A postal survey can miss people with low literacy, sight loss or a first language other than English.

2

Timing shapes who is available

Tenants who work, study or care for others are often unavailable during the working day. If most contact happens between nine and five, results will lean towards those who are at home.

3

Response rates hide gaps

A good overall response rate can hide groups who barely took part. If younger tenants, one estate or one ethnic group are under-represented, overall results may still look robust while saying little about their experience.

4

Weighting can't fix everything

Weighting adjusts results so that groups count in proportion to the tenant population. It is a useful tool. In 2024/25, 22% of TSM submissions used it. But weighting can't create views from people who weren't heard. If only a handful of tenants from a group responded, weighting them up multiplies the uncertainty.

5

Some voices need more than a survey

Some tenants are reluctant to take part because of past experience, mistrust or vulnerability. Reaching them takes trained interviewers, patience and the right approach, not just another reminder letter.

Hearing every voice: six principles

1. Know who you are trying to hear

Start with good data about your tenants: age, disability, household type, ethnicity, language, tenure, area and property type. Without it, you can't tell whether your survey is representative. That gap is exactly what the regulator has criticised.

2. Track representation while fieldwork is live

Don't wait for the final report to discover a gap. Monitor responses against the tenant profile throughout fieldwork, and adjust while there is still time: more calls in one area, a different approach for one age group, translated materials for another.

3. Offer more than one way to take part

Combine methods so tenants can respond in the way that suits them: telephone, online, post or face to face. Telephone interviewing is particularly good at reaching people who won't fill in a form. A trained interviewer can explain the survey, help with questions and reassure people who are unsure.

4. Make it easy to say yes

Call at different times of day, including evenings. Offer booked appointments at a time that suits the tenant. Provide translation, large print and easy-read formats where needed. Small adjustments can make a big difference to who takes part.

5. Train interviewers to recognise vulnerability

Interviewers should be trained to spot signs that a tenant may be vulnerable or at risk, and to respond appropriately. When tenants share concerns about their welfare or their home, those concerns must reach the right team quickly. Our VIRA service, Voice-Informed Risk Alerts, is included with all our social housing research and makes sure every welfare concern and Awaab's Law hazard is passed on in real time, with a full record of what happened next.

6. Report who you heard, and who you didn't

Every survey report should show how the people who responded compare with the tenant population, and be clear about any gaps. Breaking results down by group shows whether some tenants have a very different experience. That is what the Transparency, Influence and Accountability Standard asks landlords to understand.

Questions every board should ask

1. How well do our survey respondents reflect our tenant population, and which groups are under-represented?
2. Do we have the data about our tenants that we need to answer that question?
3. Do satisfaction results differ between groups, such as by age, disability, ethnicity, area or tenure?
4. What do we do to reach tenants who are less likely to respond?
5. How quickly do welfare concerns raised during surveys reach the right team?
6. How do we use what we learn from under-represented groups to change our services?

Conclusion

A satisfaction score is only as good as the voices behind it. Landlords that hear from a representative range of tenants get a truer picture of their services and earlier warning of problems. They also get evidence the board and the regulator can trust.

Hearing every voice takes more effort than sending a survey and waiting for replies. It means knowing who your tenants are, giving them real ways to take part and checking who you have heard. For tenants who are too often unheard, it is the difference between being counted and being overlooked.

Sources

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- Office for National Statistics, Language, England and Wales: Census 2021
- Connecting Cambridgeshire, Experiences of digital exclusion among temporary accommodation and social housing tenants (2025)

Hear every tenant

We'll show you who your surveys are reaching, who they're missing and how to close the gap.

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