

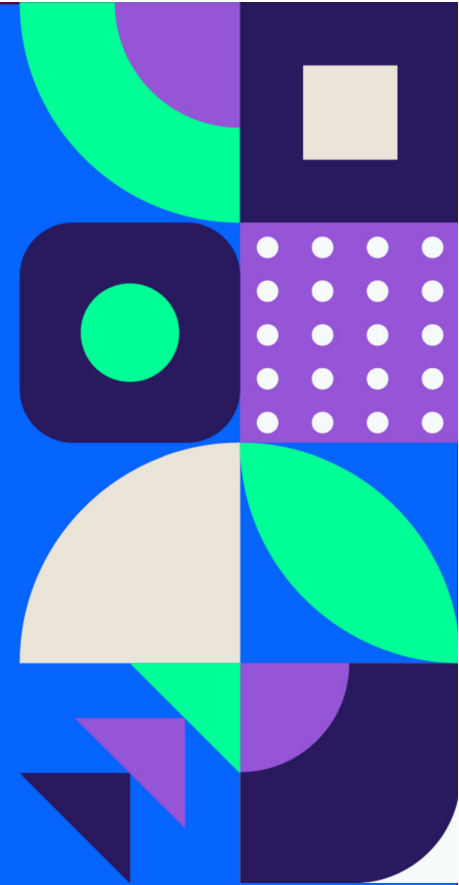
Housemark

Tenant Satisfaction Measures

2023/24 year-end results

June 2024

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Introduction

Following the long-awaited implementation of consumer regulation on 1 April 2024, Housemark is publishing an exclusive first look at Tenant Satisfaction Measures (TSMs) for the full year. All registered providers are required to report TSMs using standardised satisfaction and management figures for the year to March 2024.

While the Regulator of Social Housing (RSH) is due to publish a report in the autumn, as the sector's data experts, we have been tracking TSM performance for the past year. We can now reveal where the sector stands across England using results landlords are submitting to the regulator.

Augmented by Housemark's unique performance data, insight and analysis, this report is the only place to see landlords' TSM performance in context.

With some stark results highlighting the squeeze the sector is facing and the scale of the challenge ahead, at the end of the first full year it's clear that there is still work to do.



2023/24 year-end results for all **22** Tenant Satisfaction Measures



Data from **221** Registered Providers of social housing



Managing **2.3 million** properties – half of all social homes in England

At a glance...

Overall tenant perception dips below 70%

Overall service satisfaction has been tracking downward over the last five years. The median result for 2023/24 has dipped below 70% for the first time.

Landlords 'getting used' to new complaint code

While average stage 1 complaints volumes rose by 15% over 12 months, there is still much for landlords to do to meet expectations and improve tenants' experience of using landlords' services. Informal recording is still masking volumes.

Communication issues impact overall repairs perception

The sector's operational repairs performance is holding steady, but landlords continue to struggle with effective communications and moving the needle on overall perceptions of maintenance services.

Building safety remains solid

Landlords' record-keeping for building safety TSMs remains high, with most landlords reporting full compliance across each activity.

Neighbourhood perception trails overall satisfaction

Satisfaction with the sector's neighbourhood management scores several points lower than overall perception. Tackling ASB and taking an active role in communities are now part of consumer regulation.

Overall tenant perception

Housemark research has found that improvements to operational services such as repairs will take around 18 months to filter through to better perception results. This means that any immediate work to enhance the customer experience may not show in TSMs until 2025/26.

Our latest year-end TSM figures indicate that repairs services and quality standards have the strongest correlation with overall satisfaction rates and are vital to improving perception.

While TSM results up to March 2024 are at an all-time low, our Monthly Pulse data since April is starting to show a modest recovery amongst landlords who have already taken action to improve services. Housemark's exclusive analysis reveals the drivers of increased positive perception, illustrating the levers to pull to improve tenant experience.

Shared ownership below rented sector baseline

Data from landlords with significant shared ownership stock are tracking considerably lower than the sector's rented baseline.

While the overall trend mirrors other tenures' data highs and lows, low cost home ownership satisfaction rates average over 10 points lower.

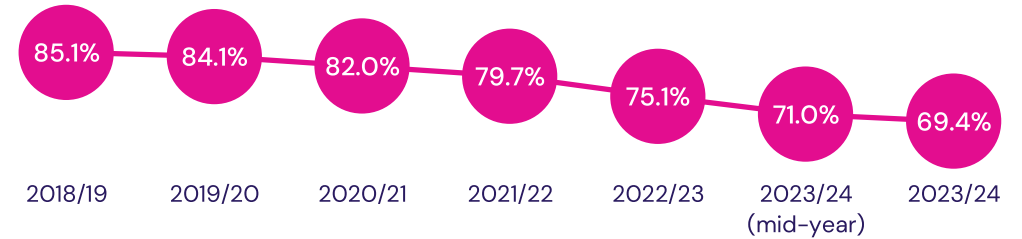
As shared ownership comes under scrutiny, the combined impact of higher rents and repairs responsibility is driving poor perception and value for money concerns.



Satisfaction rates 'can only get better'

Overall service satisfaction has been tracking downward over the last five years. Our analysis of individual results reveals that the decline in satisfaction is proportionately more where landlords started out low, whereas those with higher baseline figures have not reported such large falls.

Median satisfaction

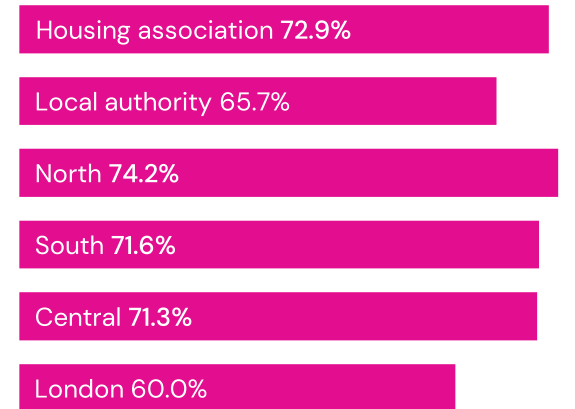


Understanding the results in context

Housemark [analysis](#) has established several contextual factors that can affect landlords' results behind service quality.

It is key to compare satisfaction results in context to understand the drivers, make the right decisions, channel investment and drive service design and ultimately tenant experience.

Median satisfaction



Customer experience

In April 2024, the Housing Ombudsman rolled out the latest complaint handling code, which is now mandatory for all English social landlords. Even though the new code went live after the period covered by these TSMs, Housemark’s exclusive Monthly Pulse data has highlighted a subsequent upward trend in complaint volumes.

However, the results suggest that some landlords are still in the process of moving away from recording complaints informally and continue to perceive lower volumes as intrinsically ‘better’, despite evidence that this ‘masking’ of complaints is driving dissatisfaction.

Service still not meeting expectations

Perception results for each of the key customer experience measures show little sign of changing from previous surveys.

While most tenants feel respected by their landlord, TSM results reveal that expectations are not being met for communicating and listening.

Furthermore, satisfaction with complaints handling fell by 15% between 2022/23 and 2023/24 indicating that there is still much work for the sector to do.

Median satisfaction

Approach to complaints handling



Treats them fairly and with respect



Keeps them informed about things that matter



Listens to tenant views and acts



Annual complaints volumes rise by 15%

Average stage 1 complaints volumes rose by 15% between 2022/23 and 2023/24, while stage 2 volumes rose by 20% over the same period.

This is the first time that median complaints volumes have risen so close to 40 cases per 1,000 properties and shows that many landlords are heeding Ombudsman guidance to formally record all expressions of dissatisfaction.

Capturing and learning from complaints feedback is a great improvement tool. Our analysis shows that landlords ahead of the curve have already adjusted systems to meet regulatory and customer needs.

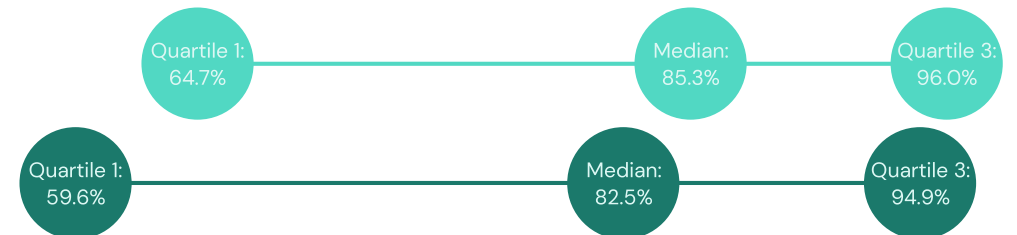


In-target response performance improves

With the Housing Ombudsman setting clear sector-wide response times for landlords, TSM data is starting to show progress with performance at the median improving across each quartile since March 2023.

Stage 1 complaints per 1,000 homes

Sample based on landlords submitting data in both years



Responsive repairs

Housemark data shows that in 2023/24 social landlords recorded an average of 3.3 repairs per property – around 14m across England. As repairs is the main point of contact between landlords and tenants, it is a crucial service to get right and raise perception levels.

TSMs consciously move away from traditional transactional satisfaction surveys. By measuring tenants' perception of the service as a whole, TSMs are designed to provide a better general indication of landlords' performance. Resolving process, culture and communication challenges will be key to overall improvement.

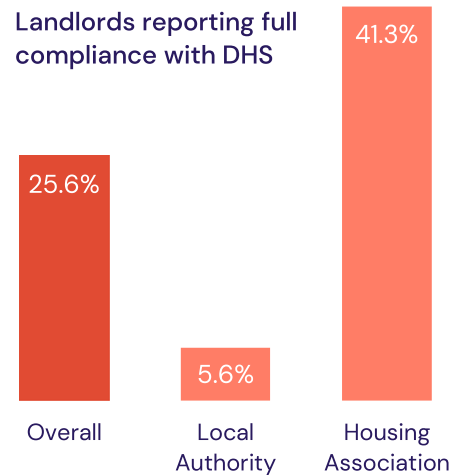
Tenant perception surveys are backed by management TSMs covering the quality and efficiency of maintenance services.

Decent Homes compliance reduces by 29%

The TSM measuring the quality of social housing is based on non-compliance with the 2006 Decent Homes Standard.

The results show that, on average, local authorities report non-decency rates 95x higher than housing associations, flagging some deeper issues with public sector housing.

With the RSH inspecting the sector's stock condition data, we forecast a sharp rise in non-decency as the quality and quantity of surveys increases.



Maintenance TSMs 'driving' overall perception

Satisfaction with the three maintenance TSM questions all have strong correlations to overall perception rates. Alongside two-way communications, improving tenants' experience of their landlord's repairs service is key to driving up overall satisfaction.

Median satisfaction



Year-end WIP falls alongside stable completions

Unlike complaints, social landlords have considerable freedom to set target timescales for repairs.

Over 12 months, the proportions of 2023/24 emergency and non-urgent repairs completed within target have changed little.

Housemark monthly data on repairs volumes identified a year-end 'push' to reduce backlogs. Compared to mid-year, works-in-progress fell 21% to 7.4% of all completed repairs.



94.8% emergency repairs completed in target – down 1.3 percentage points on 2022/23



94.8% non-emergency repairs completed in target – down 2.2 percentage points on 2022/23



Works-in-progress average 7.4% of completions – down 21% since mid-year

Building safety

The RSH’s new consumer standard for safety and quality went live in April 2024. This requires landlords to physically inspect all properties and keep records up-to-date, using this data to inform the provision of good quality, well maintained and safe homes for tenants.

Addressing some of the findings of the Grenfell Inquiry, landlords must also ensure that the safety of tenants is considered in the design and delivery of services while taking steps to mitigate risks. For many, meeting this standard requires additional resources, at a time when supply chain and operating margin pressures, combined with skills shortages, are proving challenging. Despite these pressures, performance remains solid.

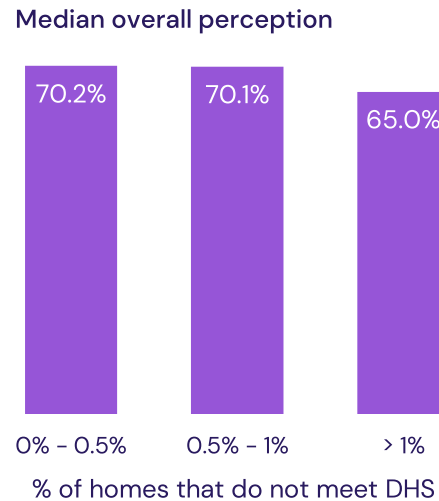
Safety and quality driving satisfaction

Satisfaction that tenants feel their home is safe is among the highest scoring TSMs.

This is evident across all landlord types and locations with rates averaging seven points higher than overall perception; for LCHO residents, the gap was 18 points.

Our year-end data shows a clear relationship between perception of safety and decent homes compliance TSMs with overall satisfaction.

Work to improve safety and quality has a measurable impact on outcomes.



Safety compliance ‘close to 100%’

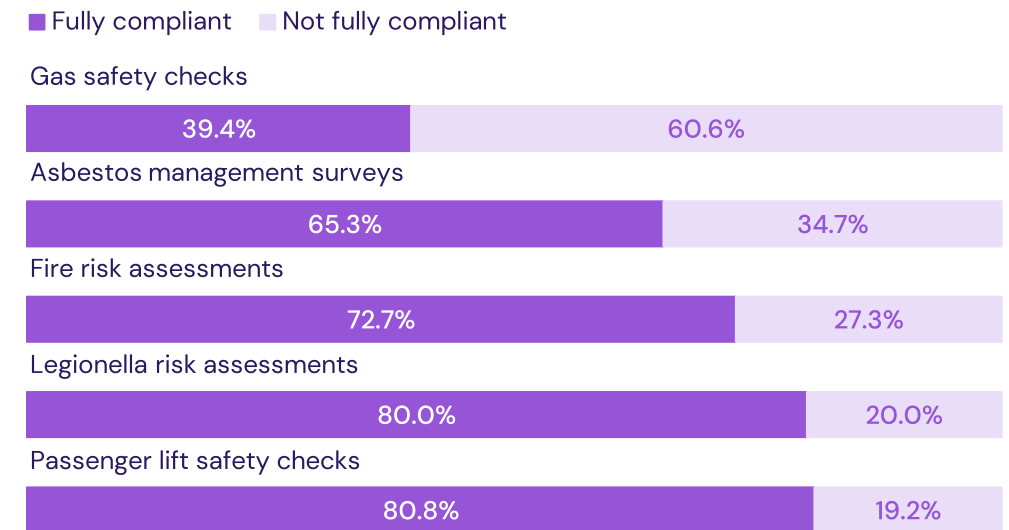
TSM building safety compliance results reveal most landlords are at or close to full compliance with each set of regulations.

Where more than half the landlords in a sample have recorded full compliance, the median is 100%. Gas safety is the only building safety measure where fewer than half of landlords achieved full compliance.

At the mid-year point, we found some diversity amongst landlords in their interpretation of HSE guidance underpinning building safety measures – especially legionella. The emphasis on standardised regulation for tenant satisfaction appears to be missing from the definitions for safety reporting.

We expect that this is an area the RSH will tighten up as it reviews the first year of regulatory TSM submissions.

Percentage of landlords who are 100% compliant



Neighbourhood management

The updated Neighbourhood and Community standard looks outside tenants' front doors and considers the landlord's role in the local area. It defines regulatory expectations for the work performed by the sector to help neighbourhoods to function and communities to flourish.

After more than a decade of pared-down services, the need for landlords to gear up, invest and become active participants in communities will take time.

Initial TSM results show that tenants are not yet convinced that landlords have made progress in making neighbourhoods safe and pleasant spaces.

Case rates rise as ASB recording improves

Housemark analysis shows that recorded ASB is strongly influenced by the strategic value landlords place on the service. Landlords working in areas with similar characteristics often have vastly different ASB volumes due to internal priorities.

Even with a regulatory emphasis on dealing with ASB and hate incidents, overall case volumes are less than 60% of the [figure from 2013/14](#). This TSM gives landlords the opportunity to become more proactive in tackling anti-social behaviour.



38.6 ASB cases were opened per 1,000 homes in 2023/24



0.7 hate related ASB cases were opened per 1,000 homes



1 in 8 landlords recorded zero hate-related ASB cases

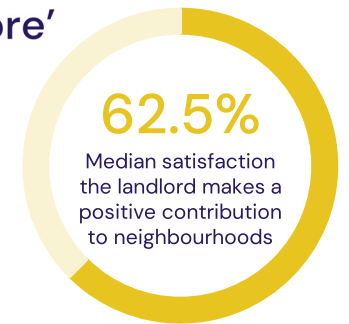
Communal areas 'score lower' than homes

Around two-thirds of tenants are satisfied with the cleanliness and maintenance of communal areas. This will become an area of regulatory focus with new consumer standards' specific expectations for communal areas and shared spaces.



Landlords 'could contribute more'

TSM satisfaction that landlords make a positive contribution to tenants' neighbourhoods is ambiguous. While some landlords have maintained positive relationships with local partners throughout the last decade, many others will be starting from a low base.



Approaches to ASB 'not meeting expectations'

While only 1 in 25 tenants report ASB, the TSM measures the service's perception amongst all respondents. This question's comparatively low score suggests the sector needs to improve communications about work tackling ASB.



National TSM results 2023/24 year-end

The quartiles presented in these tables are numerical, meaning that Quartile 1 represents the lowest values and Quartile 3 the highest. The top performing quartile is highlighted in a darker shade.

TSM Perception Measures (LCRA)	Quartile 1	Median	Quartile 3
TPO1: Proportion of respondents who report that they are satisfied with the overall service from their landlord.	63.0%	69.4%	78.0%
TPO2: Proportion of respondents who have received a repair in the last 12 months who report that they are satisfied with the overall repairs service.	64.5%	70.4%	78.7%
TPO3: Proportion of respondents who have received a repair in the last 12 months who report that they are satisfied with the time taken to complete their most recent repair.	59.0%	66.4%	75.5%
TPO4: Proportion of respondents who report that they are satisfied that their home is well maintained.	63.3%	69.4%	77.8%
TPO5: Proportion of respondents who report that they are satisfied that their home is safe.	70.0%	76.1%	82.2%
TPO6: Proportion of respondents who report that they are satisfied that their landlord listens to tenant views and acts upon them.	51.3%	58.9%	67.3%
TPO7: Proportion of respondents who report that they are satisfied that their landlord keeps them informed about things that matter to them.	62.7%	69.5%	76.7%
TPO8: Proportion of respondents who report that they agree their landlord treats them fairly and with respect.	70.0%	76.3%	83.3%
TPO9: Proportion of respondents who report making a complaint in the last 12 months who are satisfied with their landlord's approach to complaints handling.	26.0%	33.8%	40.0%
TP10: Proportion of respondents with communal areas who report that they are satisfied that their landlord keeps communal areas clean and well maintained.	58.7%	65.5%	72.3%
TP11: Proportion of respondents who report that they are satisfied that their landlord makes a positive contribution to the neighbourhood.	56.0%	62.5%	71.2%
TP12: Proportion of respondents who report that they are satisfied with their landlord's approach to handling anti-social behaviour.	51.0%	57.0%	63.6%

National TSM results 2023/24 year-end

TSM Management Measures	Median	% fully compliant
BSO1: Proportion of homes for which all required gas safety checks have been carried out.	99.97%	39.4%
BSO2: Proportion of homes for which all required fire risk assessments have been carried out.	100.00%	72.7%
BSO3: Proportion of homes for which all required asbestos management surveys or re-inspections have been carried out.	100.00%	65.3%
BSO4: Proportion of homes for which all required legionella risk assessments have been carried out.	100.00%	80.0%
BSO5: Proportion of homes for which all required communal passenger lift safety checks have been carried out.	100.00%	80.8%
RPO1: Proportion of homes that do not meet the Decent Homes Standard.	0.31%	25.6%

TSM Management Measures	Quartile 1	Median	Quartile 3
RPO1: Proportion of homes that do not meet the Decent Homes Standard.	0.01%	0.31%	2.80%
RPO2(1): Proportion of non-emergency responsive repairs completed within the landlord's target timescale.	72.4%	81.5%	88.5%
RPO2(2): Proportion of emergency responsive repairs completed within the landlord's target timescale.	87.7%	94.8%	98.5%
Responsive repairs that had not been completed ('work-in-progress') at period end as a % of completed responsive repairs	3.7%	7.4%	10.5%
CH01(1): Number of stage one complaints received per 1,000 homes.	24.9	39.7	72.4
CH01(2): Number of stage two complaints received per 1,000 homes.	3.0	5.3	10.1
CH02(1): Proportion of stage one complaints responded to within the Housing Ombudsman's Complaint Handling Code timescales.	63.1%	83.3%	98.6%
CH02(2): Proportion of stage two complaints responded to within the Housing Ombudsman's Complaint Handling Code timescales.	63.1%	83.3%	98.6%

About this report

Housemark collected data from 221 English landlords choosing to submit year-end TSM results for the period April 2023 to March 2024. Our data entry fields match the Regulator of Social Housing's TSM guidance and definitions.

Data collection included headline results for all 22 TSMs with a small number of contextual fields. Tenant perception survey satisfaction results are based on responses from low cost rental accommodation, unless specified otherwise.

Data collection took place April-May 2024. This included a thorough data validation and quality assurance check before analysis started.

Type	Count
Housing Associations	118
Local Authorities	103

Region	Count
North	62
Central	71
South	45
London	43

If you want a better handle on tenant satisfaction and its drivers, get in touch to discuss our TSM audits and perception surveys.

Find out more housemark.co.uk

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