Tenant Satisfaction Measures Exclusive First Look

2024/25 year-end results – only with Housemark

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Contents

This report offers a first look at the latest 2024/25 results for English regulatory Tenant Satisfaction Measures (TSMs), providing a snapshot of performance, perception, and sector trends.

Introduction

This exclusive report brings you a first-look at 2024/25 results for regulatory Tenant Satisfaction Measures (TSMs).

Our analysis reveals a sector that is responding well to a huge change in regulation with positive year-on-year movement across the 22 TSMs.

As the sector continues to grapple with operational complexity and squeezed finances, landlords must maximise value from running efficient business to providing the best front-line services that make a real difference to tenants' lives.

To conduct our TSM research, we have analysed data collected from individual landlords alongside results published by the regulator and Housing Ombudsman.

Together with unique insight taken from our monthly Pulse analysis, we are starting to see the distinguishing features of high-performing organisations.

Our research highlights the clear relationships we found between organisation design, service delivery, inspection grading, and satisfaction.

Since TSMs became part of the regulatory landscape in April 2024, the sector has been using Housemark data to understand the complex relationship between services and how they are perceived by tenants.

The results in this report give you the earliest opportunity to make decisions based on the latest figures for the year to March 2025.

- 2024/25 year-end results for all 22 TSMs
- Data from 217 Registered Providers of social housing
- Managing 2.6 million units – 62% of English social homes

Headline results 2024/25

Overall satisfaction rises to 72.5%

English landlords' average satisfaction rates have turned a corner following several years of decline. While some of this is driven by flexing survey methods, management data suggests that landlords are working to develop service performance and improve perception.

Stage 1 complaint volumes increase by 18%

Complaint satisfaction rates and volumes have risen as landlords improve services to meet the mandatory Ombudsman code. We estimate that around 200,000 Stage 1 complaints were recorded by landlords during 2024/25 – around 30,000 more than the previous year.

Repairs services remain the strongest driver of overall perception

TSM repairs satisfaction and performance both rose alongside increased demand and higher costs. Perception improved as repairs satisfaction increased to 74% while volumes rose by 400,000, adding an estimated £80m to already significant repairs costs.

Overall satisfaction

Headline satisfaction rises to 72.5% as sector responds to regulatory demands.

English landlords' average satisfaction rates have turned a corner following several years of decline. While some of this is driven by flexing survey methods, management data suggests that landlords are working to develop service performance and improve perception.

Compared to 2023/24 results, TSM satisfaction rates have all risen – with an average improvement of 1.5 points.

Many of the patterns emerging from the first year of TSM data have carried forward into 2024/25:

- Local authorities score lower than housing associations, by an average of 8.6 points.
- Smaller landlords' satisfaction rates tend to be higher: 3.1 points separate the below 5,000 units size band from those with above 20,000 units.
- The 'London-effect' remains evident with rates 10.4 points lower in the capital compared to the national average.

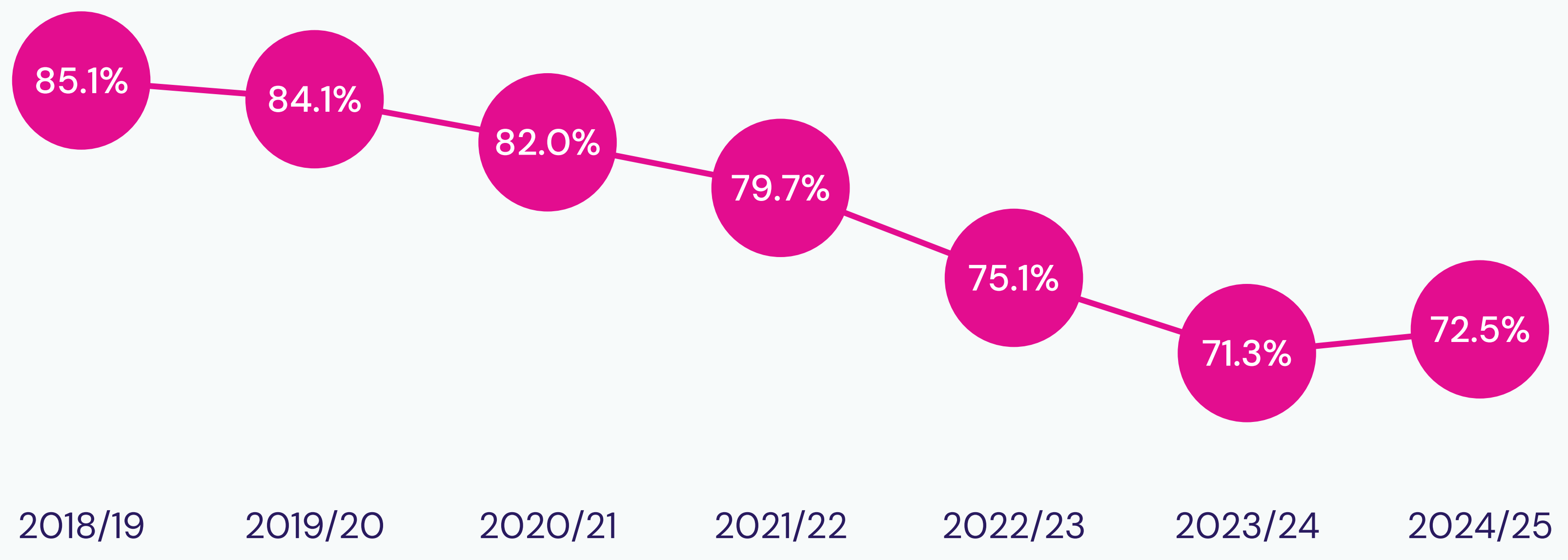
The biggest drivers of overall satisfaction are the TSM questions on safety and maintenance, closely followed by repairs and respect.

We have conducted research comparing these latest TSM results to RSH consumer inspection reports.

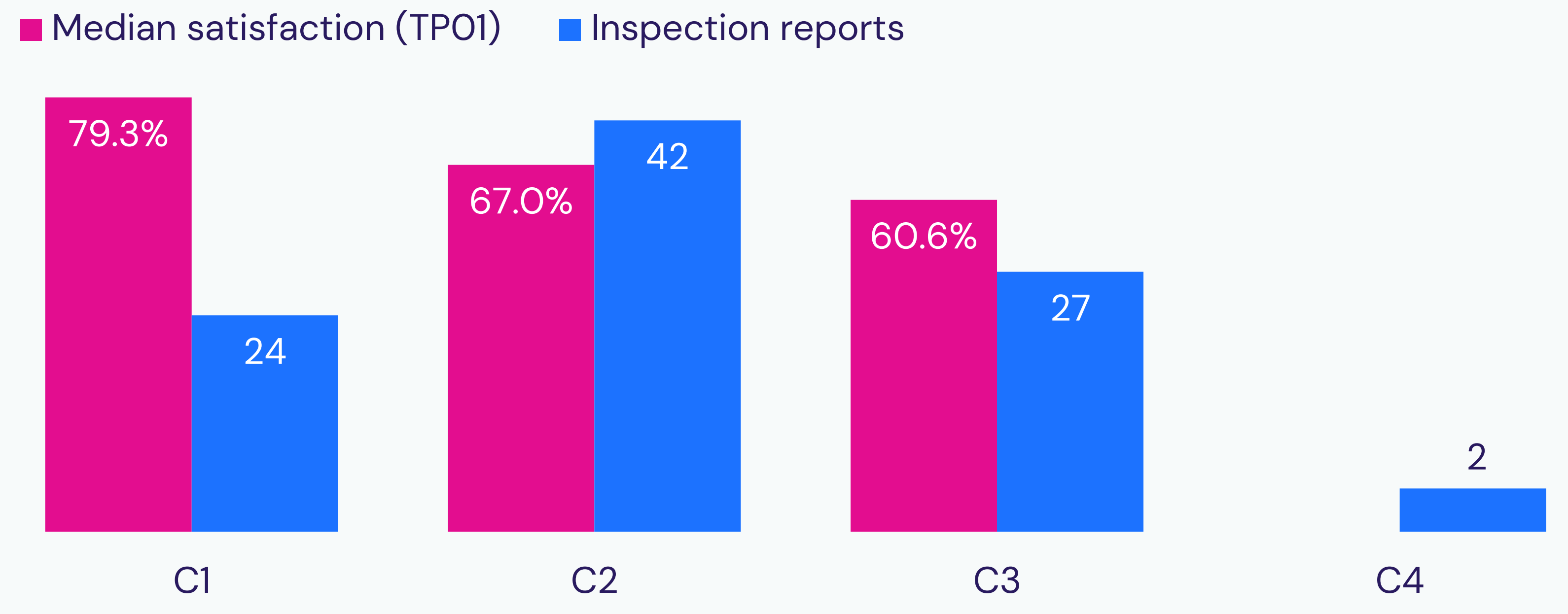
There is a clear relationship between inspection grading and overall perception, with C1 graded landlords' satisfaction comfortably above the national average.

With 83% of top-grade inspection reports highlighting positive practice in building safety and repairs, improving these services is crucial to achieving top consumer grades, which also benefits tenant perception.

TP01: Overall satisfaction (LCRA)



Consumer standard gradings and overall satisfaction



Understanding your context

Each landlord's individual context has a measurable impact on tenant perception.

The complex interplay between survey methods and actual perception adds a dynamic to TSM satisfaction analysis which is important to understand before making any judgement about comparisons or trends over time.

The pattern of methods that landlords use to conduct TSM surveys has changed since 2023/24 – with many landlords using analysis published by RSH to adjust survey methods.

Collecting satisfaction responses online is low-cost but is now known to produce lower satisfaction scores. As a result, the proportion of landlords using mainly internet surveys has plummeted from 1 in 8 in 2023/24 to fewer than 1 in 20 in 2024/25.

Conversely, in-person surveys have increased, particularly amongst London Boroughs, where 10% of tenants were surveyed face-to-face in 2024/25. This compared to a national average of 3.4%.

Changes to survey methodology have driven some of the improvement in overall satisfaction. We have reported a 2-point increase year-on-year overall.

However, when we adjust for survey method, this reduces to 1 point.

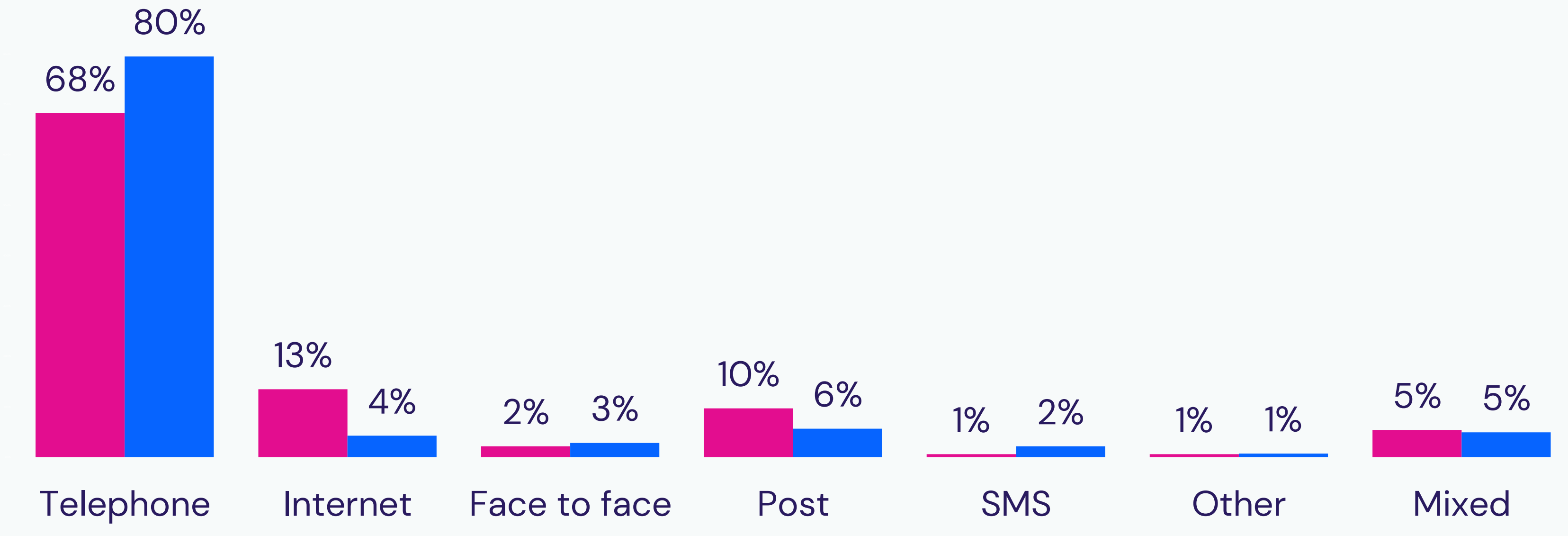
Operating conditions also affect satisfaction results. Mergers and historic development strategies have given some housing associations (HAs) geographically diverse portfolios.

HAs operating in more areas tend to score lower satisfaction. For example, landlords with stock concentrated in a single region scored 3.5 points higher than the national average. Those with stock across over half of England scored 5.5 points lower.

Access exclusive insight through Housemark membership. With data on survey methods and frequency, stock location, and organisational structure, we show how your context and operating decisions are driving performance.

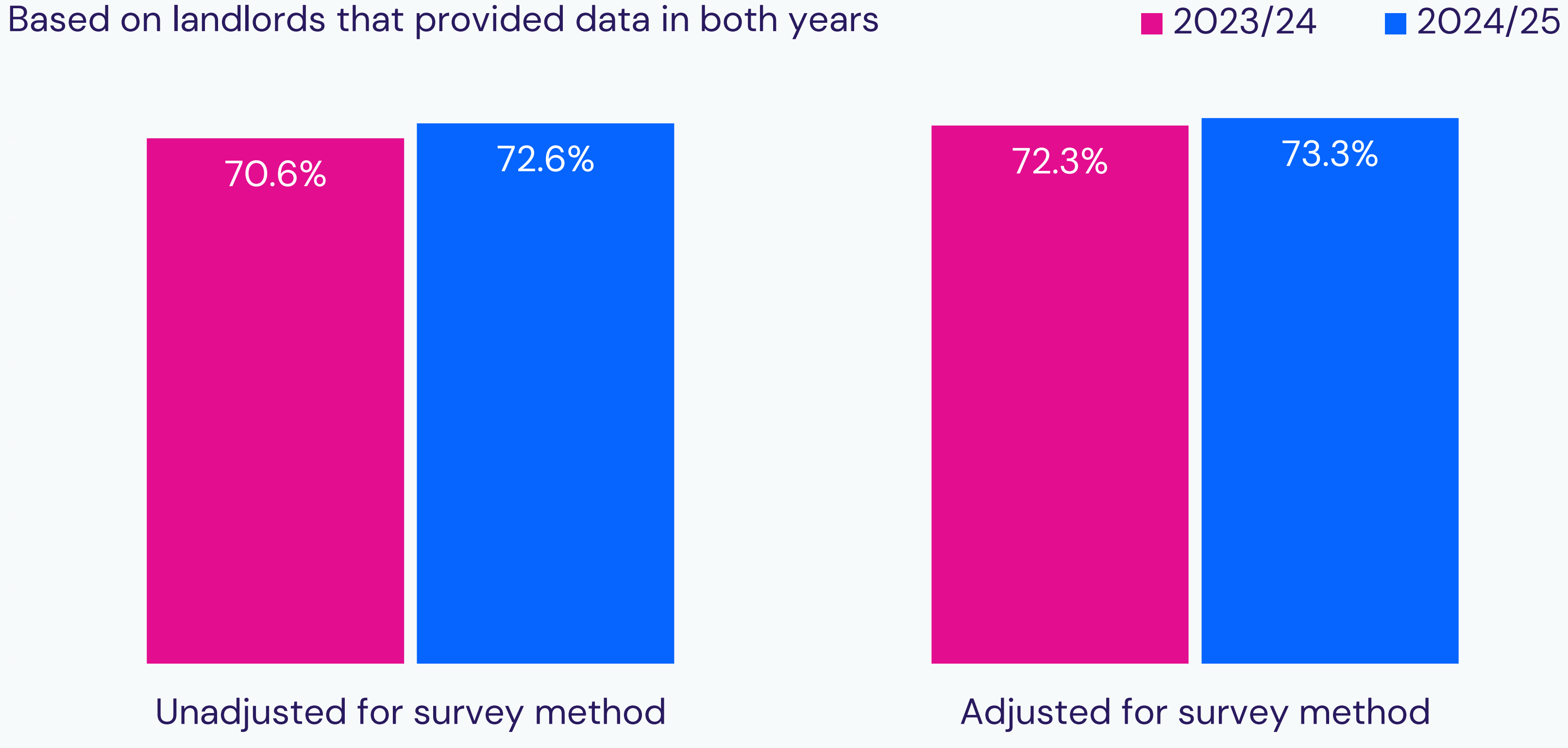
Survey collection method

Based on predominant method (over 50% of surveys collected)



TP01: Overall satisfaction (median)

Based on landlords that provided data in both years



Keeping tenants informed

Positive perception results build up from an effective communications strategy.

As well as getting the service working well, landlords can improve perception with good communication.

After safety and quality, communication is the most important factor driving satisfaction rates – questions on ‘respect’, ‘listening’ and ‘informed’ all strongly correlate to each other and overall satisfaction.

Often this is as simple as keeping in touch with tenants about individual transactions. Forward-thinking landlords are taking this further, using empathetic PR, which acknowledges everyday experiences of tenants and demonstrates what is being done.

The idea works on the notion that positive perceptions are built up from what tenants see and believe. They feel safe in their home because they see and believe their landlord is taking action - meeting regulations, making improvements and maintaining quality.

From our research comparing these TSM results to RSH consumer inspection reports, we found that two-thirds of landlords with a top C1 grade had positive comments in their inspection report about how they communicate with tenants.

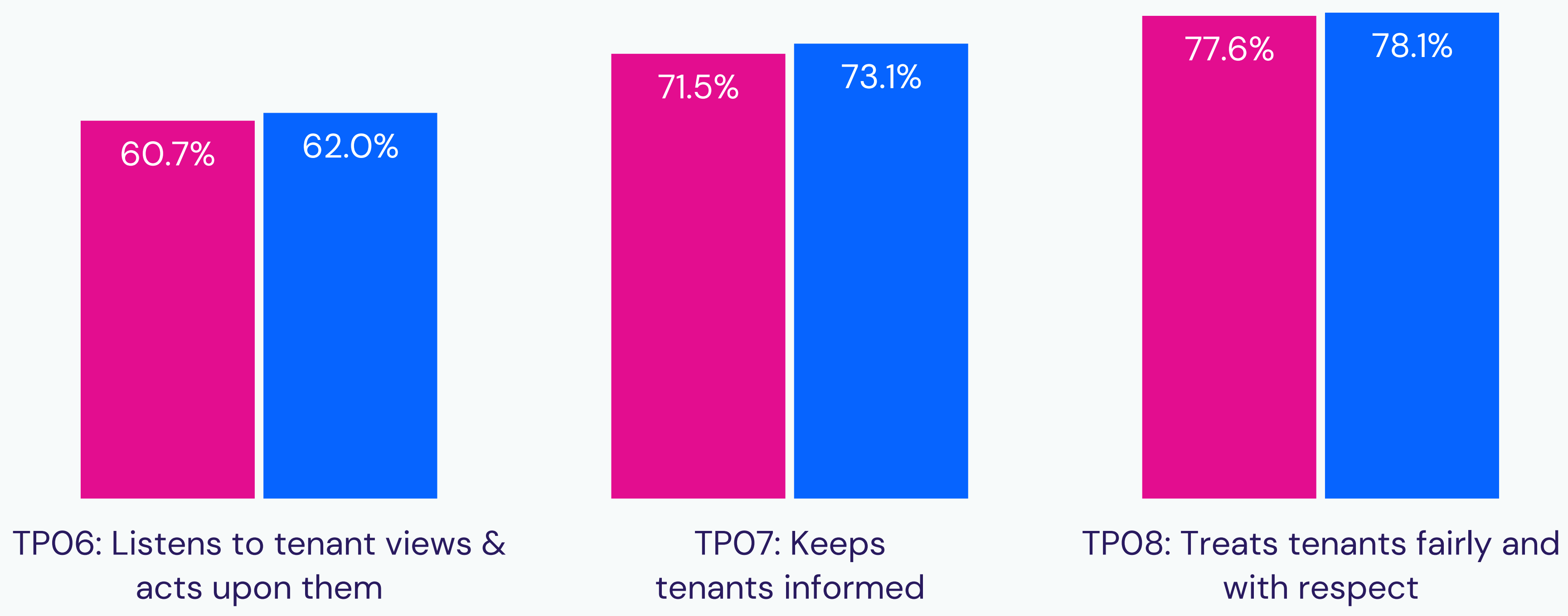
Maintaining a positive flow of information, ensuring alignment between individual activities and demonstrating good personal skills are all vital to raising overall TSM perception results on the back of service improvement.

Only landlords with embedded approaches for customer voice, tenant communications and mechanisms for co-design are achieving top consumer inspection grades. Our consultancy team can help put you on the right track.

Communications perception

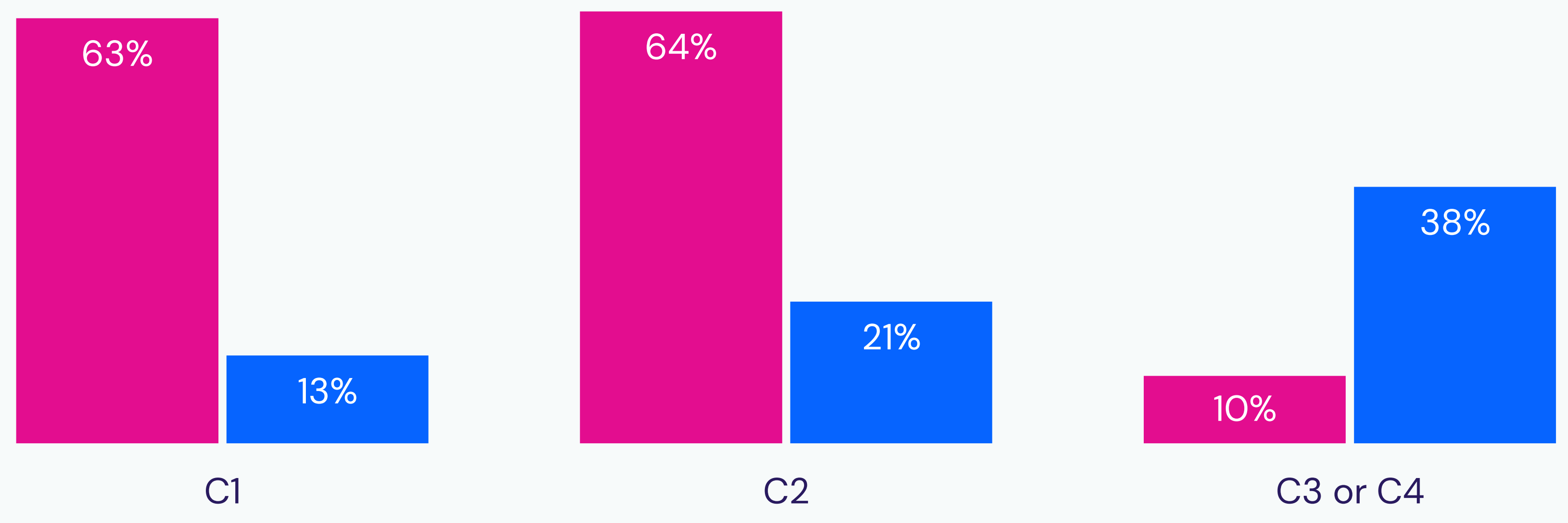
Median result based on landlords that provided data in both years

2023/24 2024/25



Consumer standard grading

Tenant engagement mentioned positively and negatively



Customer experience

Complaint satisfaction rates and volumes both rise as landlords step-up service to meet mandatory Ombudsman code.

Median satisfaction with complaint handling is up 3% year-on-year while Stage 1 complaint volumes increased by 18%.

Across the English social housing sector, we estimate that approximately 200,000 Stage 1 complaints were recorded by landlords during 2024/25 – around 30,000 more than the previous year.

Average satisfaction with complaint handling remains the lowest median result across TSM perception measures, with a modest increase to 35.3% in the same period.

Our qualitative research with landlords shows that the increase in volumes is more due to better recording methods, in line with the Ombudsman code, than a deterioration in service quality.

Between individual organisations, we have recorded considerable variation. Landlords recording the smallest complaint volumes in 2023/24, on average doubled volumes into 2024/25.

As complaints escalate, our analysis shows a closer relationship between complaints volumes and tenant perception.

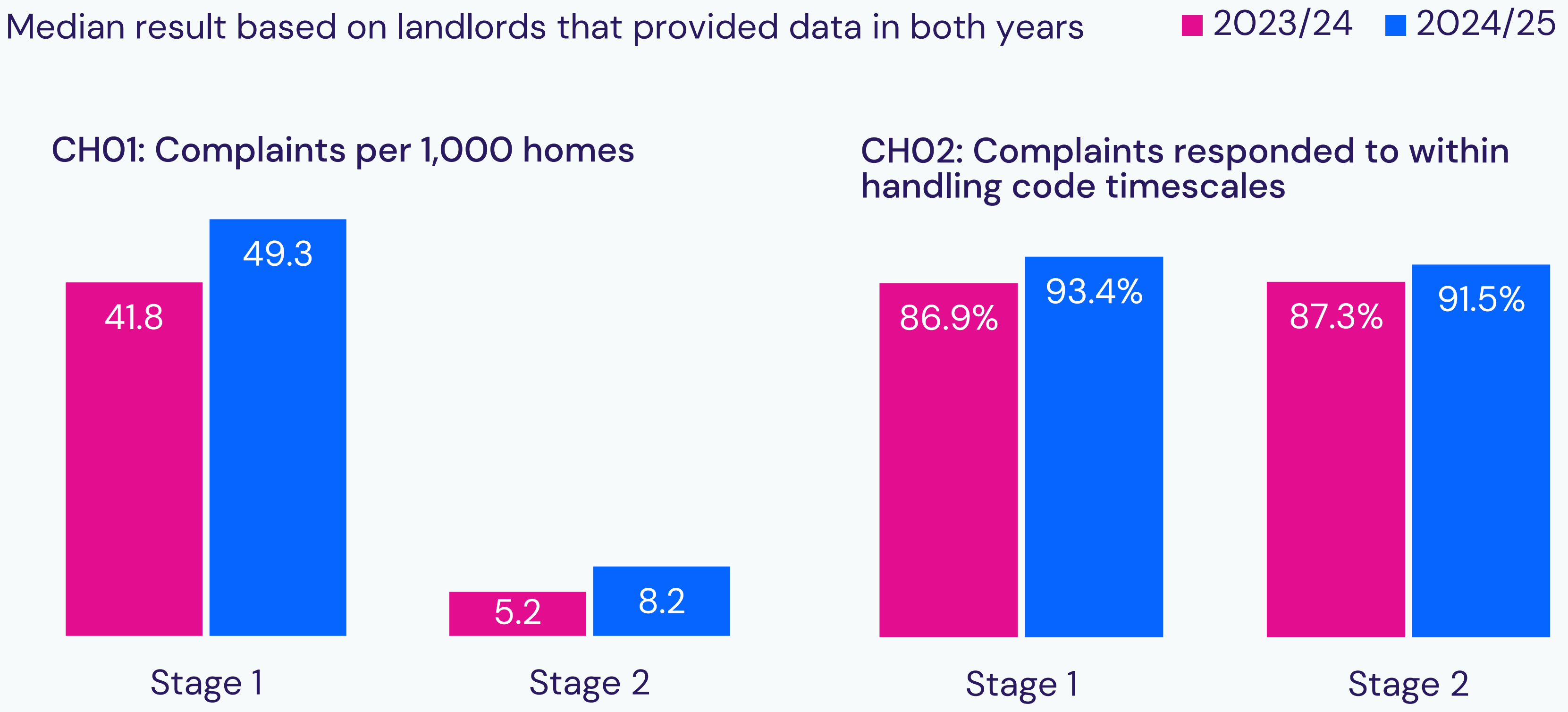
While Stage 1 complaint volumes have little impact on overall satisfaction, where larger proportions remain unresolved and move to Stage 2, satisfaction is lower.

And where the Ombudsman found high rates of maladministration, the effect is stronger still, with satisfaction rates 6-points lower, which places these landlords around the lower quartile.

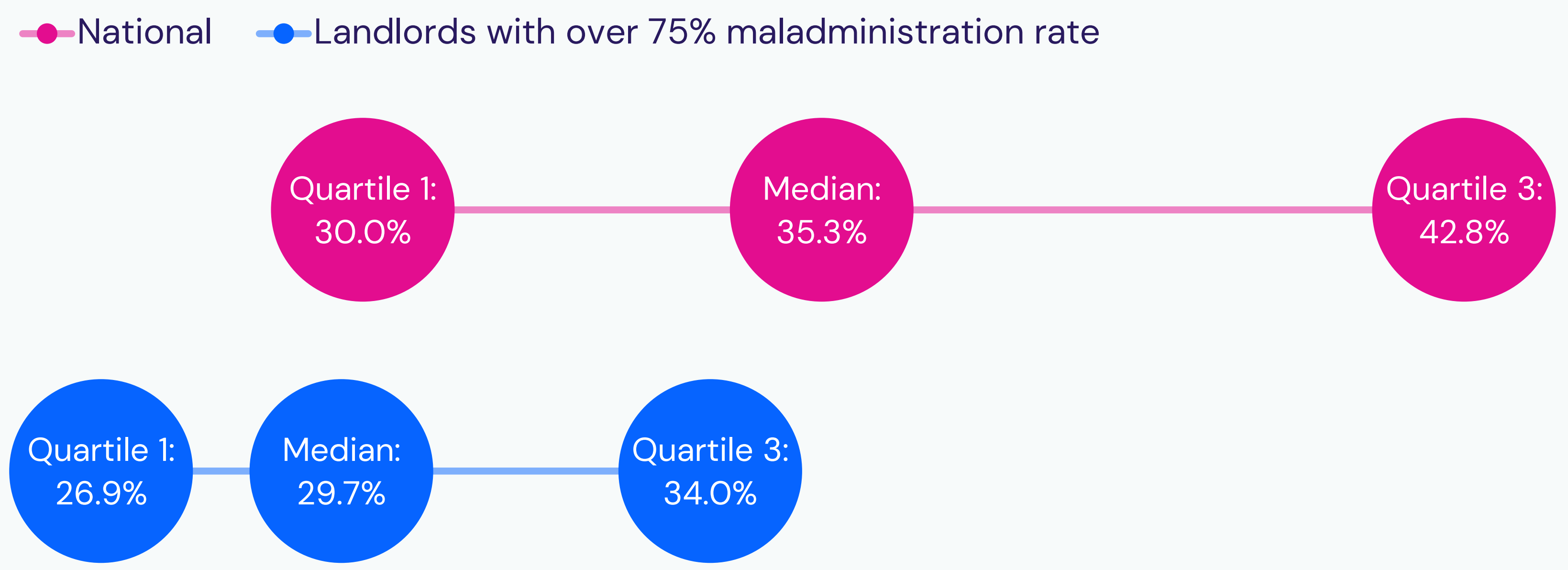
Where landlords are not addressing complaints effectively, perception of the whole organisation suffers. We can help you integrate learning from complaints into your business processes and start to tackle problems before they escalate.

Complaints volumes

Median result based on landlords that provided data in both years



Satisfaction with approach to handling complaints (TP09)



Quality maintenance

TSM repairs satisfaction and performance both rise despite increased demand and higher costs.

Perception improved in 2024/25 as repairs satisfaction rose to 74% while repairs completed within target increased to 96% for emergencies and 83% for non-emergencies. Decent Homes compliance nudged up 0.2 points.

The RSH's quarterly survey up to the end of March 2025 shows that repairs costs continued to rise in 2024/25. Sector investment in existing stock was £9bn, a rise of 13% compared to 2023/24. TSM data shows that these increases are paying dividends in terms of improved satisfaction and better performance.

Our Pulse figures for the same period recorded a national increase in completions of around 400,000 repairs, which our financial data shows would cost the sector around £80m.

This increase in resourcing and capacity is helping to drive positive satisfaction and performance outcomes alongside a reduction in outstanding repairs (WIP), which have fallen by an estimated 11% to 6.7% of repairs ordered.

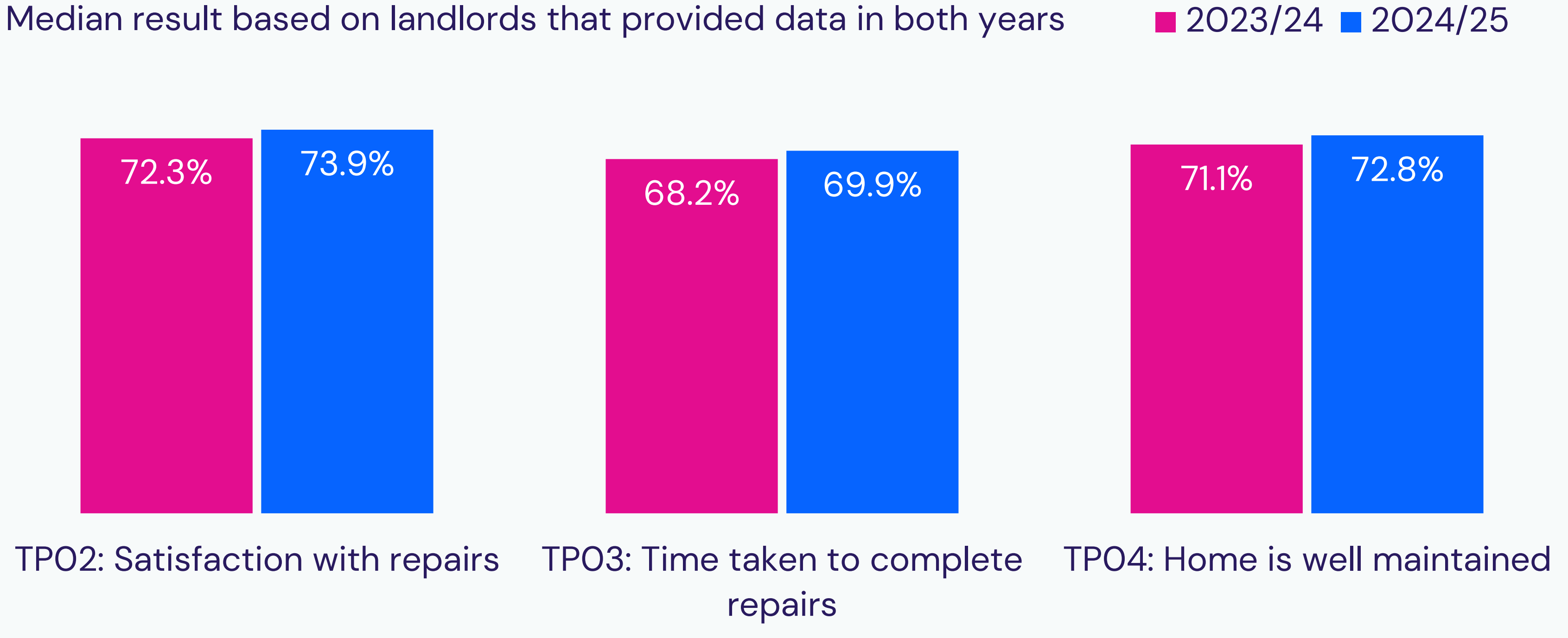
Our qualitative data has found that changes in Decent Homes compliance are often the result of improved record-keeping, in line with consumer regulation, which is a sign of the positive effect that standards can have on performance.

Repairs continues to be the strongest driver of overall perception. Top quartile landlords for maintenance perceptions score 9.2-points higher overall than the national average. This is backed by Decent Homes data – landlords with lower compliance tend to report lower overall satisfaction.

Our in-house experts have developed unique methodologies to link repairs costs, performance and satisfaction to consumer regulation. To find out more contact our consultancy team.

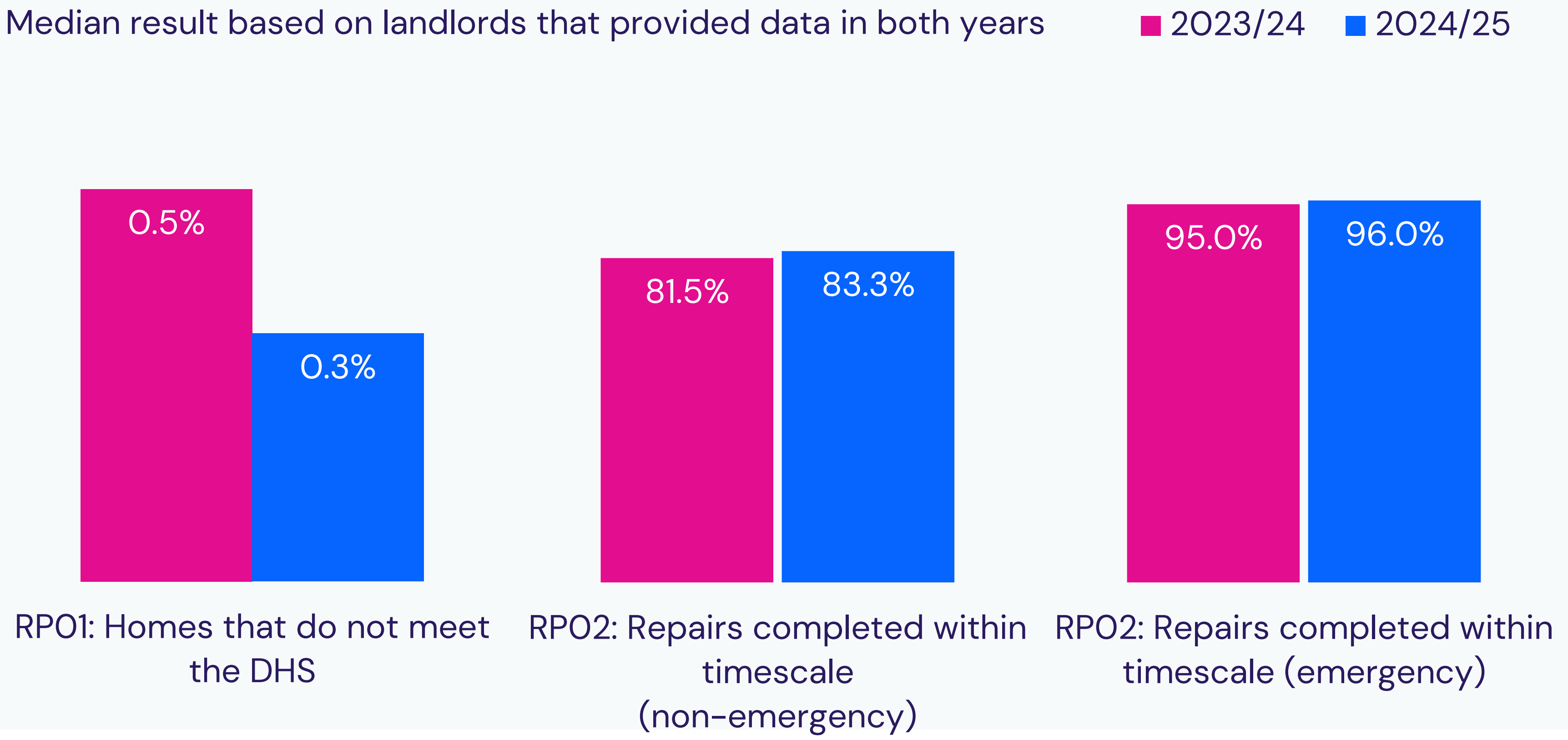
Perception scores

Median result based on landlords that provided data in both years



Management measures

Median result based on landlords that provided data in both years



Building safety

Regulatory emphasis on building safety drives improvements in compliance figures.

Housemark research has found that building safety is highlighted in almost 80% of RSH inspection reports. This clear emphasis on safety is set to continue as Awaab's Law becomes part of the regulatory landscape this autumn.

At first glance, 2024/25 building safety TSM results are virtually unchanged from the previous year – with median 100% results for all measures except for gas (BS01).

However, at an individual landlord level we are recording some significant improvements. The proportion of landlords recording 100% compliance has risen for each TSM in this section.

Asbestos (BS03) shows the largest year-on-year rise as the number of landlords recording full compliance with regulations rose by 24%.

Despite a year-on-year rise in full compliance, landlords are still struggling with gas safety, which at 43% continues to fall short of the pre-pandemic norm of around 66%.

TSM metrics are initial indicators of overall building safety performance and compliance. RSH's inspection reports give much more detail about regulatory expectations and what safety compliance means in practice.

Our qualitative research into consumer inspection reports has found a greater emphasis on safety and quality than any other standard.

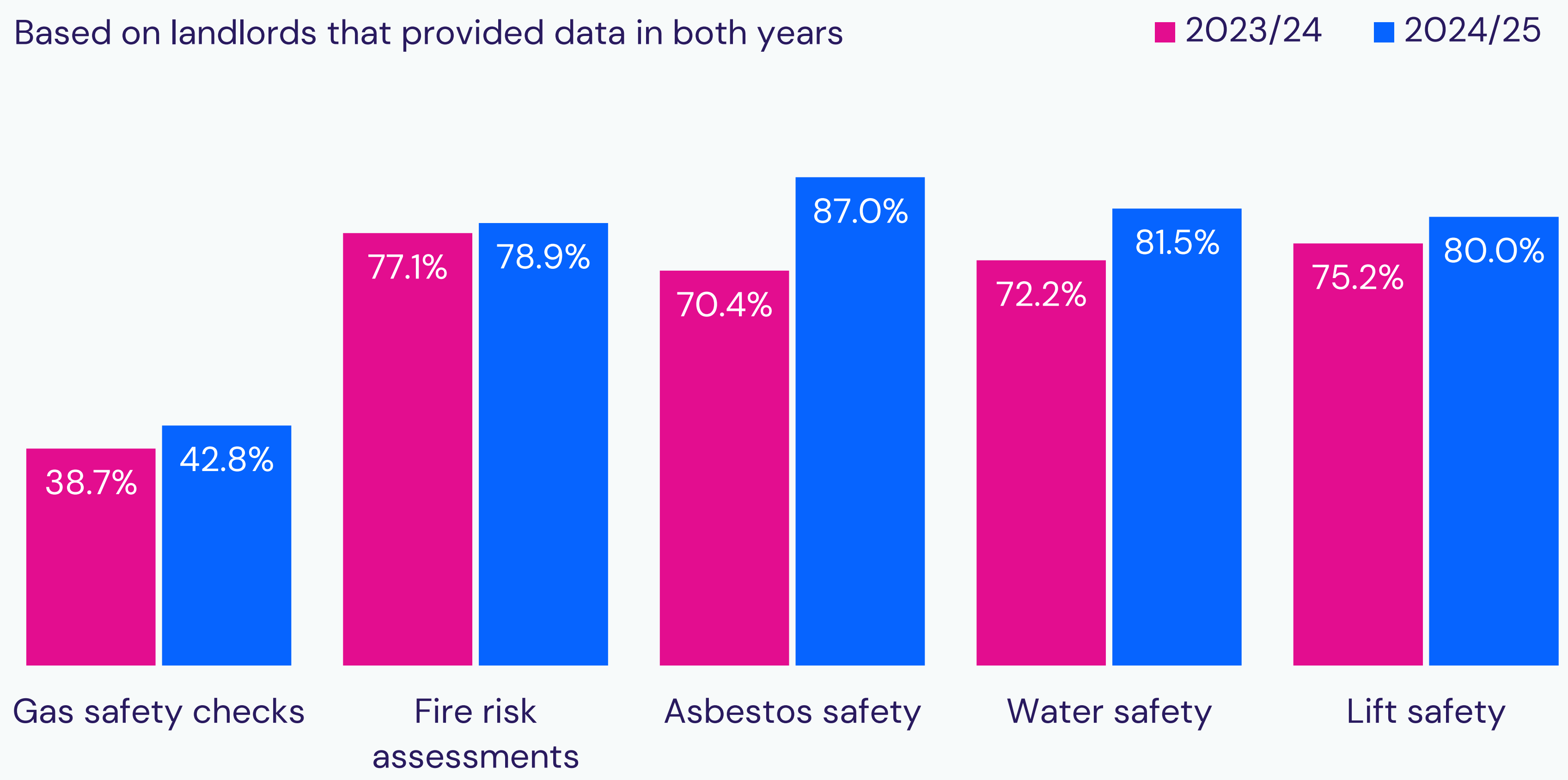
Key findings include:

TSMs do not cover the full scope of inspections, with the RSH also looking at electrical safety, admin processes and remedial actions.

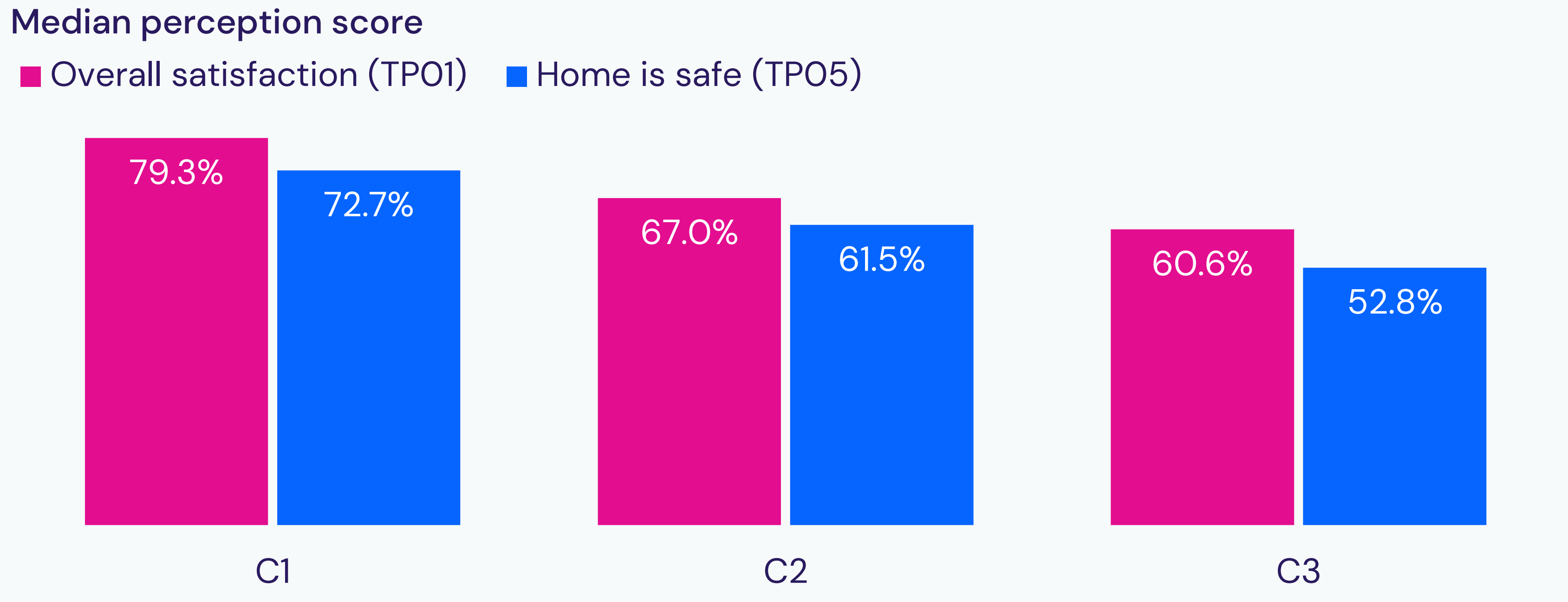
Safety compliance is a governance issue – with boards and councillors expected to have accurate and timely data for appropriate decision making.

Housemark service reviews help you understand the complex relationship between meeting compliance obligations and improving tenant perceptions of building safety. To find out more, contact our consultancy team.

Percentage of landlords reporting 100% (BS01-5)



Consumer standard gradings and satisfaction



Neighbourhood management

Despite varied performance across the sector, ASB satisfaction and case rates remain stable.

Even with a definition anchored in recent legislation, how landlords record ASB cases often differs, leading to large variations in recorded volumes.

Our qualitative data analysis has identified that anti-social behaviour (ASB) reporting varies significantly between landlords.

In contrast to Ombudsman complaints, the sector has no standardised process defining what a case is and how it should be logged. The lack of clarity between what constitutes ASB and what falls under 'Good Neighbour Management' is leading to inconsistent categorisation and underreporting.

The result is that case numbers today appear lower than Housemark data from a decade ago. Our feedback from specialist staff is that, if anything, workloads are increasing.

While only around 4% of tenants have first-hand experience of reporting ASB cases, all tenants are asked for their opinion on their landlord's handling of ASB in the TSM survey. This produces some different, perhaps unexpected results.

The ASB perception TSM relies on effective communication to all residents, rather than just those experiencing ASB, and acts as a different driver for satisfaction rates.

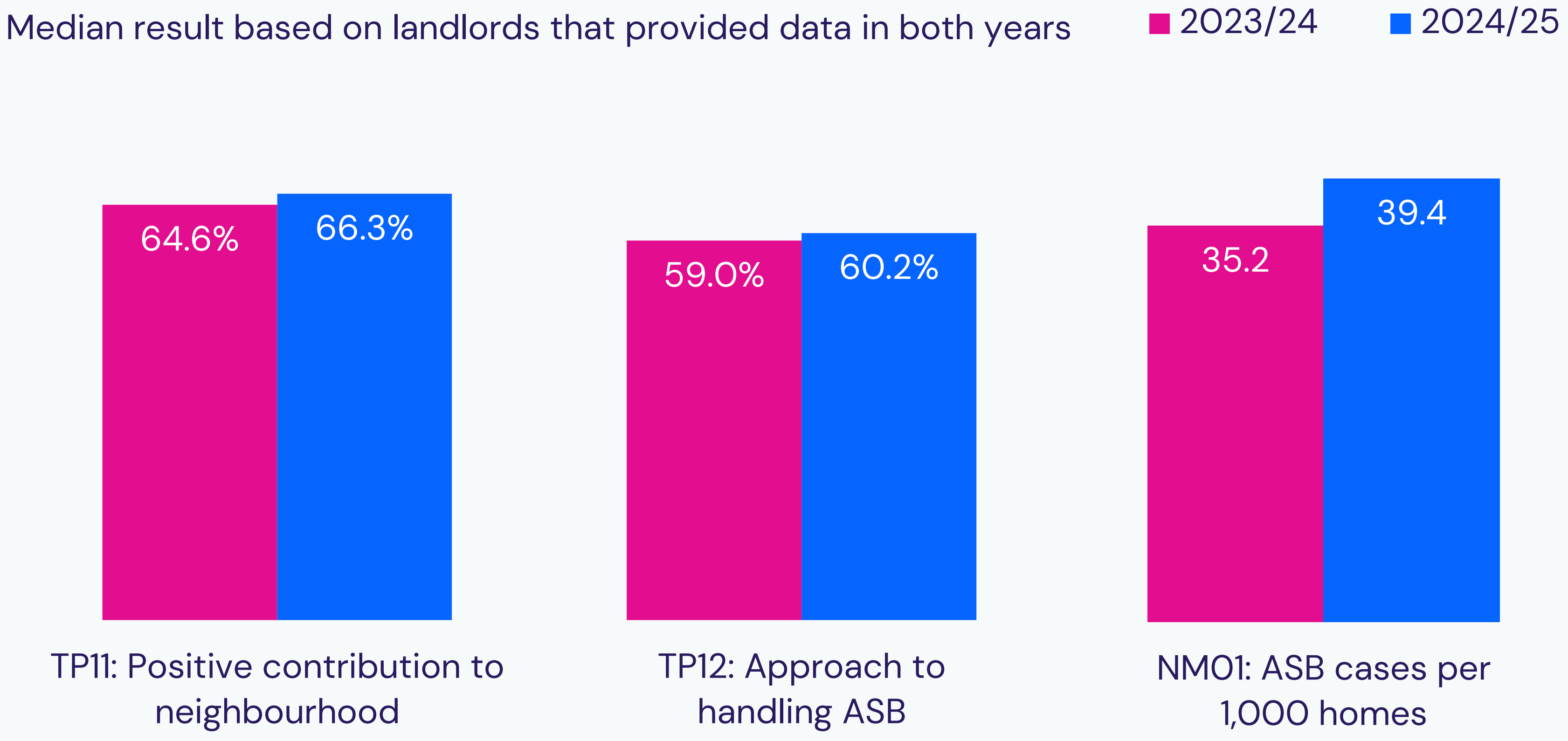
Our analysis has found that large landlords with stock concentrated in major urban areas have the scale to work effectively with other agencies tackling ASB and publicise their work to keep communities safe.

Compared to the national average, the gap between London-based landlords is much narrower for satisfaction with ASB handling at just 1-point. Similarly, ASB satisfaction for landlords based in northern England (68%) is higher than the 59% national median result.

Our unique ASB gap analysis helps you understand the links between overall satisfaction and ASB performance. It identifies where to develop the service, raising perception that you are working to resolve ASB and improve tenants' lives.

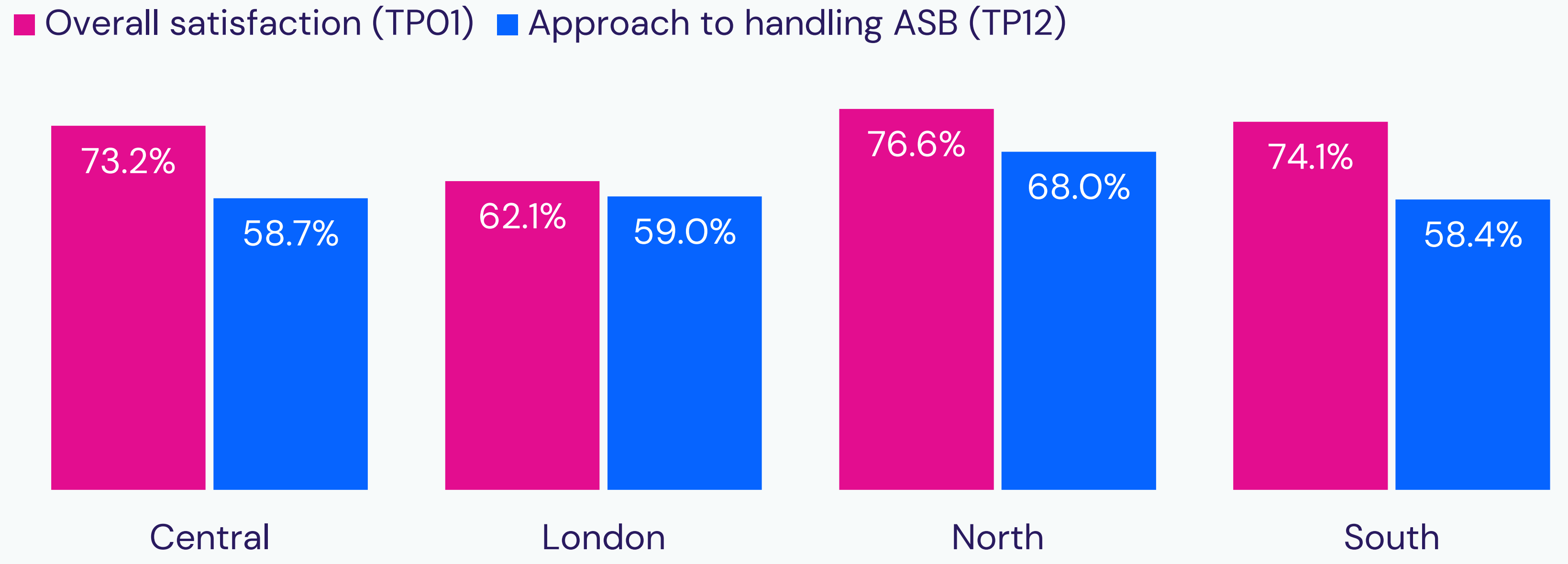
ASB and neighbourhood

Median result based on landlords that provided data in both years



ASB gap analysis

Median perception score



Low Cost Home Ownership

Shared owners' satisfaction continues to score 20-points below counterparts in rented housing.

TSM results from 2024/25 show that there is still much for the sector to learn when it comes to improving relationships with shared owners living in social housing.

Across England, the social housing sector manages around 200,000 LCHO units, with 20,000 new homes added each year.

Around 50 registered providers of social housing own enough LCHO units to require a separate TSM survey – including several for-profit landlords.

Alongside non-social leaseholders, shared owner satisfaction has been lower than rented tenants for many years. The latest median result of 51.4% shows no real change to this pattern.

With shared owners generally responsible for repairing their home, the relationship they have with landlords is based on far fewer transactions, pushing communications to the top of overall satisfaction drivers.

Even though value for money is not included in the TSM suite, our historic STAR data points towards this as a key concern for shared owners: what do I get for my rent?

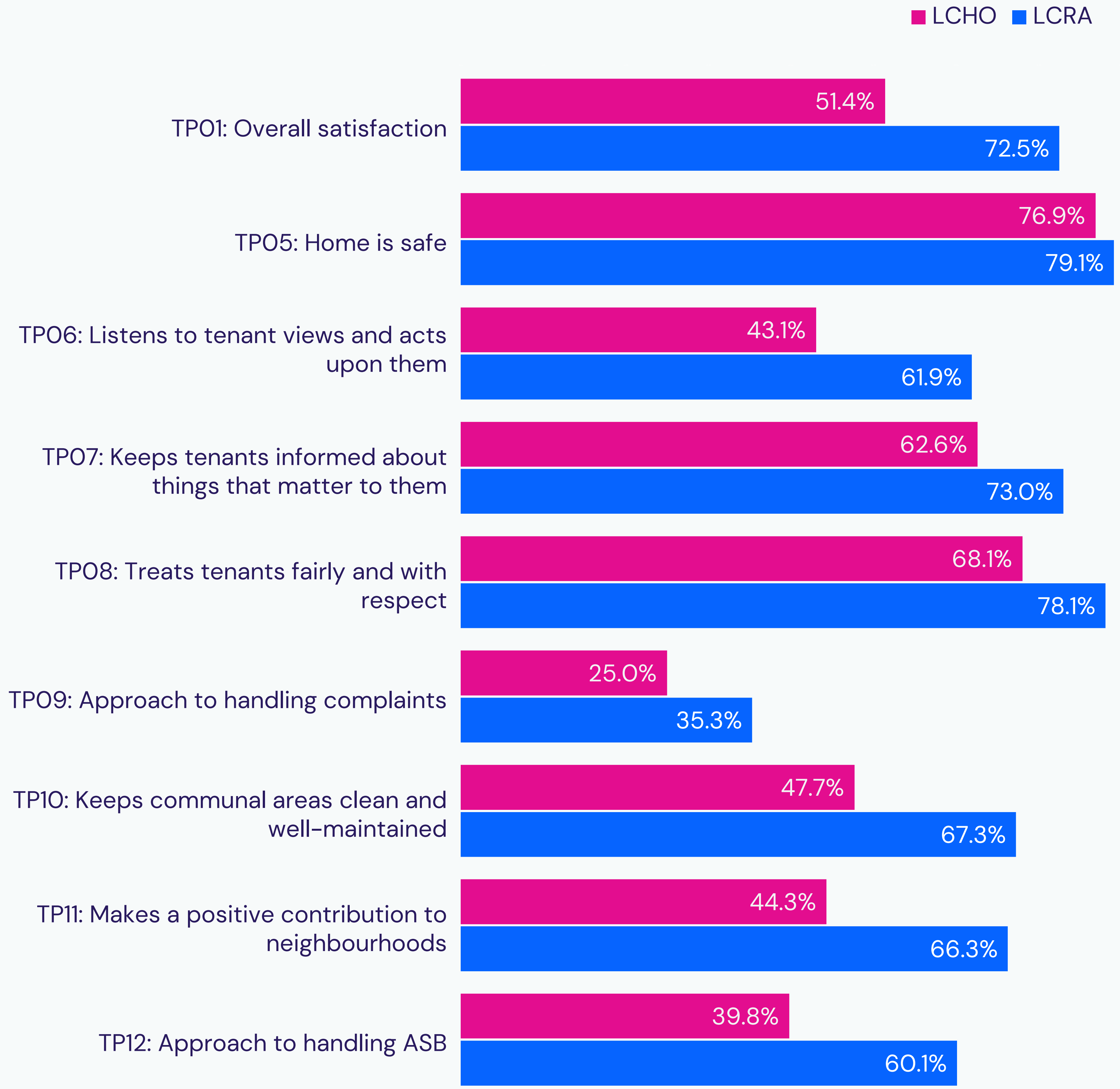
Alongside VFM, the latest TSM figures show shared owner results diverging from rented tenants in other areas, such as complaints.

While the number of Stage 1 complaints is similar across the two tenures, the number of LCHO residents escalating complaints to Stage 2 is almost twice as high as LCRA tenants.

Despite chronically low satisfaction results, landlords' LCHO services are not mentioned in any RSH inspection report published up to June 2025.

Housemark data covers LCHO cost and resourcing and satisfaction trend. We can help you uncover key drivers of LCHO satisfaction and make improvements for this fast-growing cohort of social housing residents.

National perception scores (median)



We're here to help

Our TSM products and services to help you create real change for your organisation, your customers, your homes and your people.

As the UK's leading data and insight company for housing, we offer a complete TSM (Tenant Satisfaction Measures) consultancy service. Our expertise in data and regulation makes us not just a provider, but the perfect partner in your research.

Our proven methodology helps landlords reach more tenants and gather reliable results. Then our insights and analysis quickly identify pain points and areas that could be made better. We understand what excellence looks like, and we'll help you meet TSM regulatory requirements.

We can also enhance your regulatory readiness by accelerating improvements based on data and tenant feedback. TSM Surveys are not just about compliance. They're a chance to engage with tenants, boosting satisfaction in the short, medium, and long term. It's all here, all for you.

We work with over 350 social housing providers across the UK, covering 3.8 million homes. We're housing market specialists with a deep understanding of current regulations and best practices.

We capture over 3,500 datasets annually, providing timely and relevant insights.

Our benchmarking and analytics capabilities are unmatched, offering meaningful insights to stakeholders.

Taker a closer look at our TSM offer

Supporting the entire end-to-end process and going beyond compliance

TSM Survey

Transform regulatory exercises into strategic opportunities. Unlock deep, actionable insights that elevate resident experiences and drive measurable improvements in organisational performance.

TSM Analysis

Maximise the impact of your TSM survey data—drive focused, meaningful improvements that raise your regulatory scores and deliver better, more responsive services to your residents

TSM Audit

Build successful TSM strategies for the future and improve your reporting to the regulator with a deep understanding of your survey performance

Housemark is the leading data and insight company for the UK housing sector.

25 years' experience helping the sector to achieve more.

Jointly owned by the Chartered Institute of Housing and National Housing Federation.

Over 300 members across England, Scotland, Wales and Northern Ireland.

Contact us

Discover how data-driven insight can power your decisions.

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Appendix 1: 2024/25 results

TSM Perception Measures (LCRA)	Quartile 1	Median	Quartile 3
TP01: Proportion of respondents who report that they are satisfied with the overall service from their landlord.	66.0%	72.5%	79.7%
TP02: Proportion of respondents who have received a repair in the last 12 months who report that they are satisfied with the overall repairs service.	67.1%	74.0%	79.6%
TP03: 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.	64.0%	69.9%	76.2%
TP04: Proportion of respondents who report that they are satisfied that their home is well maintained.	66.0%	72.8%	78.8%
TP05: Proportion of respondents who report that they are satisfied that their home is safe.	72.9%	79.1%	83.7%
TP06: Proportion of respondents who report that they are satisfied that their landlord listens to tenant views and acts upon them.	54.7%	61.9%	71.0%
TP07: Proportion of respondents who report that they are satisfied that their landlord keeps them informed about things that matter to them.	67.0%	73.0%	80.3%
TP08: Proportion of respondents who report that they agree their landlord treats them fairly and with respect.	73.3%	78.1%	84.9%
TP09: Proportion of respondents who report making a complaint in the last 12 months who are satisfied with their landlord's approach to complaints handling.	30.0%	35.3%	42.8%
TP10: Proportion of respondents with communal areas who report that they are satisfied that their landlord keeps communal areas clean and well maintained.	62.5%	67.3%	73.3%
TP11: Proportion of respondents who report that they are satisfied that their landlord makes a positive contribution to the neighbourhood.	60.1%	66.3%	74.5%
TP12: Proportion of respondents who report that they are satisfied with their landlord's approach to handling anti-social behaviour.	56.0%	60.1%	67.9%

These quartiles are based on all landlords who had submitted data for 2024/25. 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.

Appendix 1: 2024/25 results

TSM Management Measures	Median	% fully compliant
BS01: Proportion of homes for which all required gas safety checks have been carried out.	99.97%	42.6%
BS02: Proportion of homes for which all required fire risk assessments have been carried out.	100.00%	79.3%
BS03: Proportion of homes for which all required asbestos management surveys or re-inspections have been carried out.	100.00%	87.3%
BS04: Proportion of homes for which all required legionella risk assessments have been carried out.	100.00%	81.7%
BS05: Proportion of homes for which all required communal passenger lift safety checks have been carried out.	100.00%	79.4%
RP01: Proportion of homes that do not meet the Decent Homes Standard.	0.3%	26.7%

TSM Management Measures	Quartile 1	Median	Quartile 3
RP01: Proportion of homes that do not meet the Decent Homes Standard.	0.0%	0.3%	3.7%
RP02(1): Proportion of non-emergency responsive repairs completed within the landlord's target timescale.	75.7%	83.2%	87.9%
RP02(2): Proportion of emergency responsive repairs completed within the landlord's target timescale.	90.2%	95.9%	99.0%
Responsive repairs that had not been completed ('work-in-progress') at period end as a % of completed responsive repairs	4.8%	6.7%%	11.1%
NM01: Number of anti-social behaviour cases, opened per 1,000 homes	22.6	35.2	54.1
NM02: Number of anti-social behaviour cases that involve hate incidents opened per 1,000 homes	0.3	0.7	1.3
CH01(1): Number of stage one complaints received per 1,000 homes.	37.2	49.3	71.2
CH01(2): Number of stage two complaints received per 1,000 homes.	5.6	8.0	13.3
CH02(1): Proportion of stage one complaints responded to within the Housing Ombudsman's Complaint Handling Code timescales.	77.1%	93.4%	98.4%
CH02(2): Proportion of stage two complaints responded to within the Housing Ombudsman's Complaint Handling Code timescales.	77.8%	91.5%	100.0%

These quartiles are based on all landlords who had submitted data for 2024/25. 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.

Appendix 2: Year-on-year results

TSM Perception Measures (LCRA)	2024/25 median	2023/24 median	Difference
TP01: Proportion of respondents who report that they are satisfied with the overall service from their landlord.	72.6%	70.6%	+ 2.8%
TP02: Proportion of respondents who have received a repair in the last 12 months who report that they are satisfied with the overall repairs service.	73.9%	72.3%	+ 2.3%
TP03: 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.	69.9%	68.2%	+ 2.4%
TP04: Proportion of respondents who report that they are satisfied that their home is well maintained.	72.8%	71.1%	+ 2.5%
TP05: Proportion of respondents who report that they are satisfied that their home is safe.	79.1%	77.3%	+ 2.2%
TP06: Proportion of respondents who report that they are satisfied that their landlord listens to tenant views and acts upon them.	62.0%	60.7%	+ 2.1%
TP07: Proportion of respondents who report that they are satisfied that their landlord keeps them informed about things that matter to them.	73.1%	71.5%	+ 2.3%
TP08: Proportion of respondents who report that they agree their landlord treats them fairly and with respect.	78.1%	77.6%	+ 0.7%
TP09: Proportion of respondents who report making a complaint in the last 12 months who are satisfied with their landlord's approach to complaints handling.	35.4%	34.4%	+ 3.0%
TP10: Proportion of respondents with communal areas who report that they are satisfied that their landlord keeps communal areas clean and well maintained.	67.2%	65.9%	+ 2.0%
TP11: Proportion of respondents who report that they are satisfied that their landlord makes a positive contribution to the neighbourhood.	66.3%	64.6%	+ 2.7%
TP12: Proportion of respondents who report that they are satisfied with their landlord's approach to handling anti-social behaviour.	60.2%	59.0%	+ 2.1%

Year-on-year medians and differences are based on a sample of landlords submitting data for that measure in both years.

Appendix 2: Year-on-year results

TSM Management Measures	2024/25 % fully compliant	2023/24 % fully compliant
BS01: Proportion of homes for which all required gas safety checks have been carried out.	42.8%	38.7%
BS02: Proportion of homes for which all required fire risk assessments have been carried out.	78.9%	77.1%
BS03: Proportion of homes for which all required asbestos management surveys or re-inspections have been carried out.	87.0%	70.4%
BS04: Proportion of homes for which all required legionella risk assessments have been carried out.	81.5%	72.2%
BS05: Proportion of homes for which all required communal passenger lift safety checks have been carried out.	80.0%	75.2%
RP01: Proportion of homes that do not meet the Decent Homes Standard.	26.7%	24.4%

TSM Management Measures	2024/25 median	2023/24 median	Difference
RP01: Proportion of homes that do not meet the Decent Homes Standard.	0.3%	0.5%	- 36.8%
RP02(1): Proportion of non-emergency responsive repairs completed within the landlord's target timescale.	83.3%	81.5%	+ 2.2%
RP02(2): Proportion of emergency responsive repairs completed within the landlord's target timescale.	96.0%	95.0%	+ 1.0%
NM01: Number of anti-social behaviour cases, opened per 1,000 homes	35.2	39.4	- 10.5%
NM02: Number of anti-social behaviour cases that involve hate incidents opened per 1,000 homes	0.7	0.6	+ 16.7%
CH01(1): Number of stage one complaints received per 1,000 homes.	49.3	41.8	+ 17.9%
CH01(2): Number of stage two complaints received per 1,000 homes.	8.2	5.2	+ 57.7%
CH02(1): Proportion of stage one complaints responded to within the Housing Ombudsman's Complaint Handling Code timescales.	93.4%	86.9%	+ 7.5%
CH02(2): Proportion of stage two complaints responded to within the Housing Ombudsman's Complaint Handling Code timescales.	91.5%	87.3%	+ 4.9%

Year-on-year medians and differences are based on a sample of landlords submitting data for that measure in both years.

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