

Tenant Satisfaction Measures

2023/24 mid-year results

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Introduction

The Tenant Satisfaction Measures (TSMs) represent the biggest change to English social housing regulation for more than decade – with landlords being required to report standardised satisfaction and management figures for the year to March 2024.

Housemark is the data-driven solutions provider for the UK housing sector. To help our members understand TSM results in context, we invited English registered providers to take part in a project to compare data during October 2023.

Based on results up to the mid-point in the year (April-Sept 2023), this report gives you an exclusive early-look at sector-wide comparisons for all 22 TSMs alongside contextual analysis and Housemark insight.



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



Data from 189 Registered Providers of social housing



Managing 2.2 million properties – half of all social homes in England

At a glance...

Overall tenant perception	Overall satisfaction has been tracking downward over the last five years with negative perceptions building up from layers of unsatisfactory customer experiences.
Customer experience	Social landlords have much to learn from complaints. TSM results show that tenants are not satisfied with complaint handling with many feeling that they are not being listened to.
Responsive repairs	While repairs performance is in line with Housemark trend data, the move from transaction to perception surveys for repairs satisfaction has resulted in much lower figures for many landlords.
Building safety	Safety compliance TSMs average close to 100% across all five activities covered, with tenants largely satisfied that their home is safe and well-maintained.
Neighbourhood management	Tenant satisfaction with neighbourhood management is lower than overall satisfaction for TSMs covering communal upkeep, community contribution and approach to tackling ASB.

Overall tenant perception

Just over half the TSMs are based on figures taken from a tenant perception survey. These use standardised questions and response scales, and landlords need to achieve statistically robust sample sizes. In response to residents' feedback about gaming, the survey must either be a full census of all tenants, or a completely random and representative sample.

The data in this report is based on surveys carried out between April and September 2023. We found that 77% of landlords are carrying out phased or rolling surveys, so these scores represent approximately half their required sample. The remainder have carried out the survey as a one-off annual exercise. Around 1 in 5 participating landlords were not able to provide figures as they plan to conduct their TSM survey later in the year.

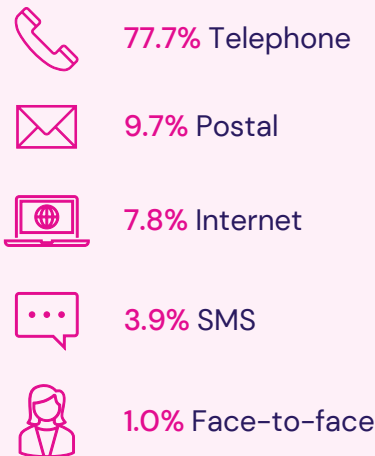
Survey method bias?

TSMs allow landlords to conduct surveys using a variety of methods including telephone, online, face-to-face and SMS.

While in-person surveys are a more expensive option than online, the results tend to be more favourable towards the landlord.

Our data shows that most landlords prefer the 'middle way' of telephone surveys.

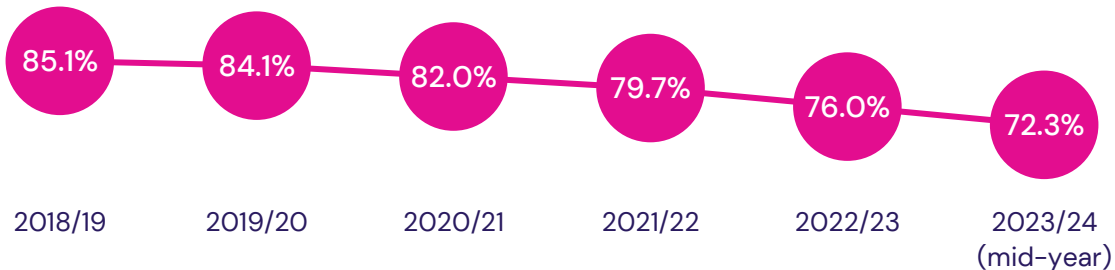
Percentage of landlords by their main survey method



Satisfaction decline over time

Overall service satisfaction has been tracking downward over the last five years. While the precise reasons for this are varied, the simple headline is that landlords are failing to meet tenants' expectations, with negative perceptions building up from layers of unsatisfactory customer experiences.

Median satisfaction

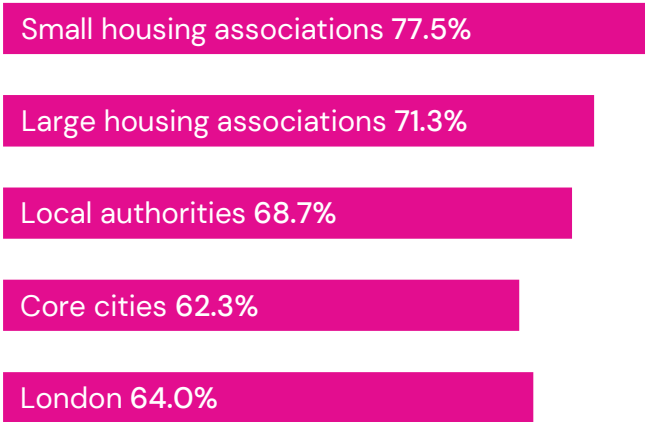


Seeing results in context

Housemark [analysis](#) of satisfaction scores has shown the importance of context in understanding TSM results.

While the quality of customer service is key, the landlord's operating context – its size, type, location and tenant population – will also affect results.

Median satisfaction



Customer experience

The service that social landlords offer tenants has measurably reduced in quality over the last 5–6 years. Housemark data shows that performance around call waiting times, complaint volumes and resident involvement have all been in decline following the ‘rolling back’ of regulation in the early 2010s.

The social housing white paper heralded a return to putting the customer experience at the centre of social landlords’ strategic thinking. While the basic needs of tenants have not changed over the last decade, expectations have risen, and the sector has had difficulty keeping pace.

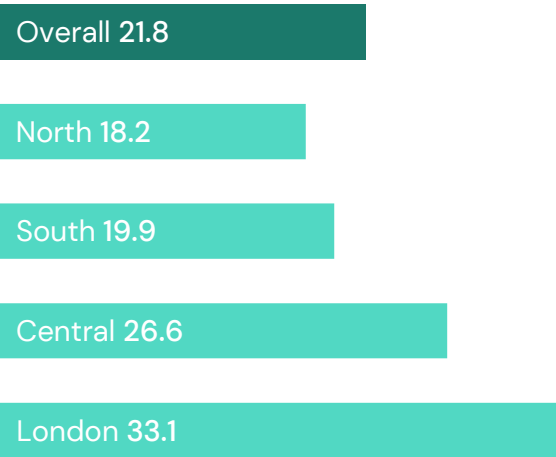
A ‘lot to learn’ from complaints

Mid-year complaint volumes are in line with cumulative monthly figures from Housemark’s Pulse reports. By region, London-based landlords record much larger complaint ratios.

While the figures presented here are averages, our analysis shows that complaint ratios can vary significantly between landlords.

High volumes are not necessarily a bad thing as they may reflect a culture of encouraging and learning from complaints.

Median stage 1 & 2 complaints
(per 1,000 units)

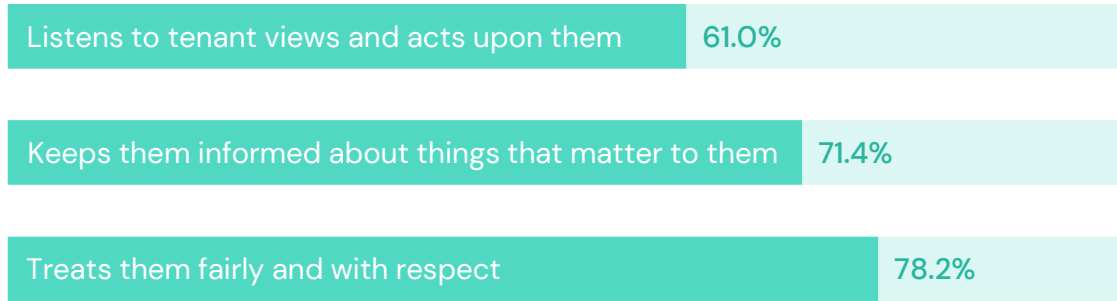


Too many words, not enough action?

Satisfaction that landlords listen to tenants and take action averaged amongst the lowest TSM scores. Being seen to respond to tenant feedback will be one of the hardest tasks for the sector to take away from TSMs.

By contrast, tenants’ perceptions of customer-facing staff being fair-minded and respectful are higher than overall satisfaction rates.

Median satisfaction



Poor perception of complaint handling

Landlords’ approaches to complaint handling drew the lowest scores of all TSMs.

Only 1 in 3 complainants from the last year felt satisfied with the way their case was handled.

Closely related to complaint outcomes, this result suggests that tenants are not getting what they expect from complaining.



Responsive repairs

Housemark data shows that social housing tenants report an average of 3–4 repairs each year. Repairs is the main point of contact between landlords and tenants, making it a crucial service to get right and raise perception levels.

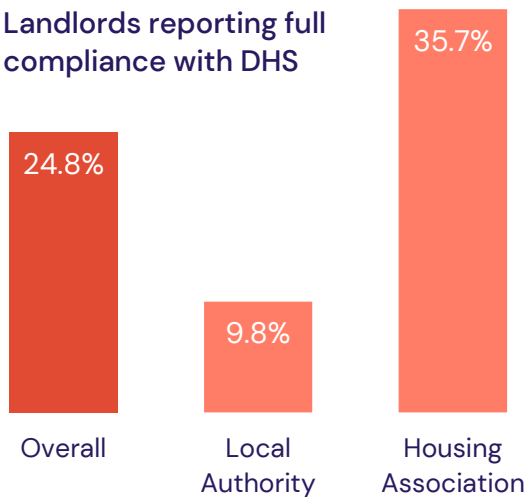
TSMs move away from traditional approaches to measure ‘transactional’ satisfaction when a repair is completed. The regulatory measure surveys tenants’ perception of the service as a whole rather than tying it to a specific person or occasion. The difference in the end results is a drop of up to 20%.

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

Decent Homes compliance remains high

Across the sector, most landlords are close to full compliance with the 2006 Decent Homes Standard (DHS). An updated version due in 2024, will likely result in many more properties failing modern criteria for a decent home.

Decency levels are much lower for local authority landlords. Affecting the largest and smallest size bands, this relates to comparatively low stock investment levels over the last decade.

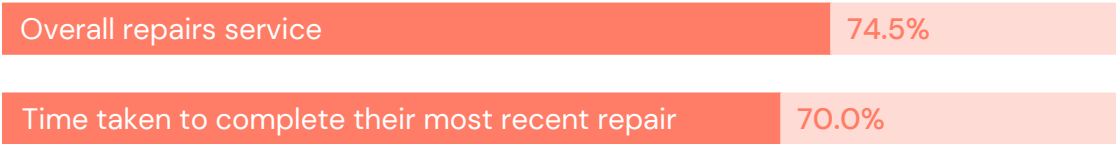


Perception ‘much lower’ than post-repair surveys

Satisfaction with the sector’s repairs services averages around 15 points lower in TSMs compared to the latest transactional post-repair surveys reported to Housemark.

Tenants feel more positive about the time taken to complete their repairs in the last 12 months, even though average days to complete repairs has risen by 36% over the last five years.

Median satisfaction




Landlords complete most repairs within target


Landlords reported completing over 80% of non-emergencies and over 95% of emergency repairs in target.

Some landlords queried the rationale of TSM ‘maximum target timescales’ as non-emergency jobs may become planned works.

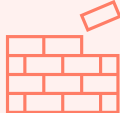
On average, works-in-progress (WIP) account for around one tenth of annualised repairs completions.



The average maximum target for **emergency** repairs was **24 hours** and **95.9%** were completed within target



The average maximum target for **non-emergency** repairs was **28 days** and **82.7%** were completed within target



Works-in-progress average **9.3%** of annualised completions but ranged from less than 1% to above 40%

Building safety

Health and Safety Executive (HSE) regulations have been guiding landlords' work for many years. While activities such as gas safety have regulations that are specifically aimed at landlords, much HSE guidance is generic and must be interpreted to calculate TSMs. This has resulted in confusion around what to count, how to count it and when to report it.

Our mid-year TSM results show that most social homes are compliant with most safety regulations. This appears to be reflected in tenants' perception ratings, which tend to be the highest scores across the dataset.

Tenants 'echo' decent homes compliance

Satisfaction rates that tenants feel their home is safe are the highest of all TSMs. While there are questions about how 'home safety' is interpreted, we found a moderately strong correlation between Decent Homes compliance and satisfaction with this measure.

By contrast, Housemark data shows no such clear link between housing repair costs and scoring high satisfaction for homes that are 'well-maintained'.



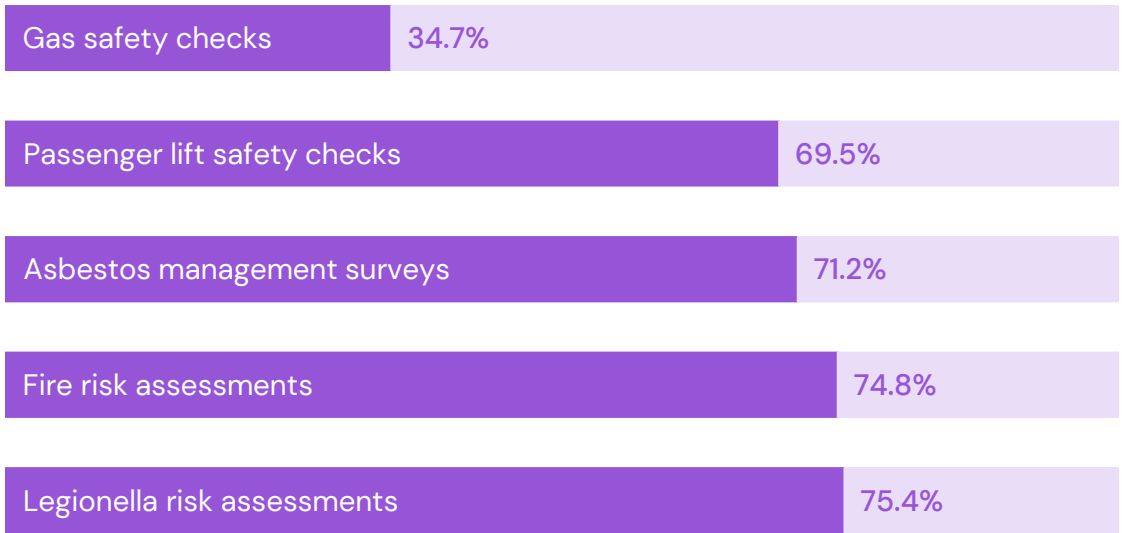
Safety compliance 'close to 100%'

A mid-year snapshot of social landlords' building safety compliance measured through the TSMs reveals most landlords are at or close to full compliance with each set of regulations.

Beneath the headlines, Housemark found considerable diversity in landlords' understanding of the detail. For example, we found that 51% of landlords counted only higher risk water installations for their legionella TSM, while 17% based the figures on all water systems and 33% used other criteria such as only counting communal water systems.

It is unlikely that tenants will be put at risk by differing interpretations of TSM guidance but the emphasis on standardised regulation for tenant satisfaction appears to be missing from the definitions for safety reporting.

Percentage of fully compliant landlords



Neighbourhood management

When the regulator consulted on proposed neighbourhood TSMs, many landlords – especially housing associations – commented that they were not the only agency involved in managing the area around the homes where their tenants live.

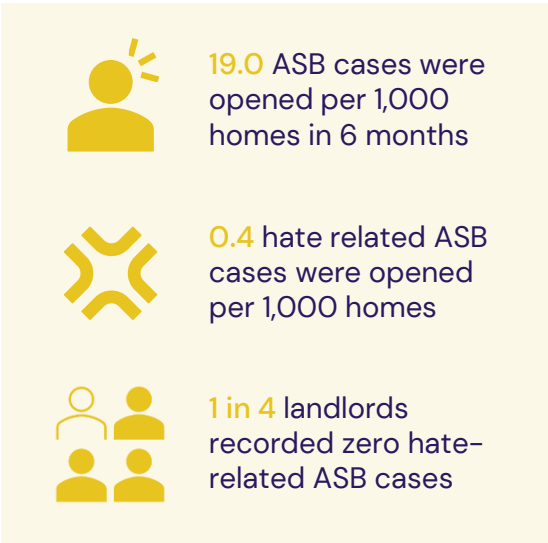
While it is true that other organisations are integral to making neighbourhoods safe and pleasant, social landlords have a key role working alongside local authorities, the police and health services to make a positive contribution and help tenants to maximise their potential.

Fewer than 4% of tenants report ASB in a year

Mid-year results for ASB (anti-social behaviour) case volumes equate to 3.8% of tenants reporting ASB to their landlord over a 12-month period.

ASB case volumes vary between landlords. Driven as much by recording systems as actual incidents, there is scope for greater standardisation in ASB services offered by the sector.

Just over 2% of reported ASB cases were categorised as ‘hate-related’. A quarter of landlords reported zero hate cases in the six-month reporting period.



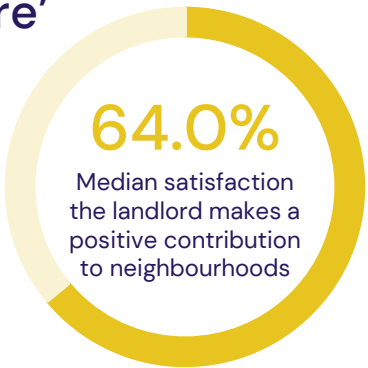
Communal areas ‘score lower’ than homes

Around two-thirds of tenants are satisfied with the cleanliness and maintenance of communal areas. This is 9% lower than satisfaction rates with the maintenance of their home and suggests that shared spaces have been prioritised less in recent years.



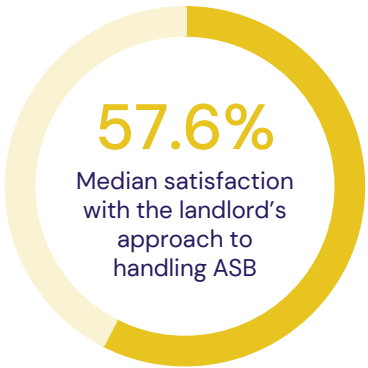
Landlords ‘could contribute more’

TSM satisfaction that landlords make a positive contribution to tenants’ neighbourhoods is decidedly ambivalent. Even if this question is misunderstood, the takeaway is that the whole sector needs to raise its profile and promote its successes.



‘Approaches to ASB’ not meeting expectations

While only a minority of residents actually report ASB, the comparatively low score for all tenants’ satisfaction with the approach to ASB suggests that general communications about these services to all residents need more attention.



National TSM results mid-year

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	Quartile 1	Median	Quartile 3
TPO1: Proportion of respondents who report that they are satisfied with the overall service from their landlord.	65.0%	72.3%	79.2%
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.	67.0%	74.5%	80.0%
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.	62.8%	70.0%	76.3%
TPO4: Proportion of respondents who report that they are satisfied that their home is well maintained.	66.0%	72.2%	80.0%
TPO5: Proportion of respondents who report that they are satisfied that their home is safe.	72.2%	78.7%	85.6%
TPO6: Proportion of respondents who report that they are satisfied that their landlord listens to tenant views and acts upon them.	53.2%	61.0%	69.4%
TPO7: Proportion of respondents who report that they are satisfied that their landlord keeps them informed about things that matter to them.	65.0%	71.4%	78.8%
TPO8: Proportion of respondents who report that they agree their landlord treats them fairly and with respect.	72.0%	78.2%	84.6%
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.	28.0%	34.0%	42.0%
TP10: Proportion of respondents with communal areas who report that they are satisfied that their landlord keeps communal areas clean and well maintained.	58.9%	66.0%	72.4%
TP11: Proportion of respondents who report that they are satisfied that their landlord makes a positive contribution to the neighbourhood.	57.3%	64.0%	74.0%
TP12: Proportion of respondents who report that they are satisfied with their landlord's approach to handling anti-social behaviour.	51.0%	57.6%	64.0%

National TSM results mid-year

TSM Management Measures	Median	% fully compliant	
BSO1: Proportion of homes for which all required gas safety checks have been carried out.	99.95%	34.7%	
BSO2: Proportion of homes for which all required fire risk assessments have been carried out.	100.00%	74.8%	
BSO3: Proportion of homes for which all required asbestos management surveys or re-inspections have been carried out.	100.00%	71.2%	
BSO4: Proportion of homes for which all required legionella risk assessments have been carried out.	100.00%	75.4%	
BSO5: Proportion of homes for which all required communal passenger lift safety checks have been carried out.	100.00%	69.5%	
RPO1: Proportion of homes that do not meet the Decent Homes Standard.	0.33%	24.6%	

TSM Management Measures	Quartile 1	Median	Quartile 3
RPO2(1): Proportion of non-emergency responsive repairs completed within the landlord's target timescale.	70.1%	82.7%	91.2%
RPO2(2): Proportion of emergency responsive repairs completed within the landlord's target timescale.	90.0%	95.9%	99.0%
Maximum target timescale for non-emergency repairs in working days	20.0	28.0	37.8
Maximum target timescale for emergency repairs in hours	24.0	24.0	24.0
CH01(1): Number of stage one complaints received per 1,000 homes.	12.4	19.4	33.4
CH01(2): Number of stage two complaints received per 1,000 homes.	1.2	2.4	4.3
CH02(1): Proportion of stage one complaints responded to within the Housing Ombudsman's Complaint Handling Code timescales.	69.5%	85.0%	96.3%
CH02(2): Proportion of stage two complaints responded to within the Housing Ombudsman's Complaint Handling Code timescales.	61.1%	82.1%	100.0%

About this report

Housemark collected data from 189 landlords choosing to submit mid-year TSM results for the period April to September 2023. The data collection form was based on the Regulator of Social Housing’s TSM provisional guidance, using definitions from its TSM Technical Guidance.

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.

Data collection took place 2–16 October 2023. Housemark conducted a thorough data validation and quality assurance check 16–26 October.

Type	Count
Housing Associations	104
Local Authorities	85

Region	Count
North	56
Central	58
South	41
London	34

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