

Committee: Housing Management and Almshouses Sub-Committee	Dated: 30/01/2024
Subject: Tenant Satisfaction Survey Results: 2023-24	Public
Which outcomes in the City Corporation's Corporate Plan does this proposal aim to impact directly?	4
Does this proposal require extra revenue and/or capital spending?	/N
If so, how much?	£
What is the source of Funding?	
Has this Funding Source been agreed with the Chamberlain's Department?	Y/N
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Summary

As part of the new regulatory regime for social housing which came into effect on 1 April 2023, social housing landlords who own or manage over 1,000 homes are required to submit annual returns against a set of Tenant Satisfaction Measures (TSMs), with the first submission to the Regulator for Social Housing due by 30 June 2024.

The Housing Division carried out its first mandatory TSM survey in November 2023, through an independent market research provider, Acuity. This report summarises the results of the survey and provides some context for the results, both in London and nationally.

The final results were received in December 2023, so this report is simply intended to bring the results to Members' attention as soon as possible after the survey closed. Further analysis of the results will follow, and it is intended that the results will be used to inform discussions on priorities and service improvements across Housing and Property Services.

Recommendation

Members are asked to:

- Note the report.

Main Report

Background

1. With effect from 1 April 2023, the Regulator for Social Housing requires social housing landlords with over 1,000 homes under their management to submit an annual return against a set of 22 Tenant Satisfaction Measures (TSMs). Twelve of the measures are obtained through an annual tenant satisfaction survey, with the remaining ten measures being collated from data held by landlords. The full set of TSMs are shown at Appendix One.

Current Position

2. The headline results from this year's survey are shown at Appendix Two (table one), alongside the results of the previous (2022/23) survey, in which the TSM questions were used as a pilot, despite not yet being a regulatory requirement.
3. For ease of reference, some key results are:

Measure	%	% change since 2022/3	Upper Quartile London %
TP01 Overall satisfaction	66.9	+9.9	64.5
TP02 Satisfaction with repairs	67.0	+4	71.3
TP03 Satisfaction with time taken to complete most recent repair	66.2	+7.2	76.3
TP07 Satisfaction that the landlord keeps tenants informed about things that matter to them	74.0	+15	68.5
TP08 Agreement that the landlord treats tenants fairly and with respect	71.6	11.6	70.8
TP10 Satisfaction that the landlord keeps communal areas clean and well maintained	73.5%	22.5	64.7

The orange colour denotes areas where the City of London Corporation satisfaction levels are below the top quartile for London and green for where the results sit in the upper quartile.

4. Members will note from Appendix Two (table one) that satisfaction levels have increased since last year in all but one area, complaints handling, which decreased by a small amount. In some areas, the increases are significant. This is likely to be due in part to the change in methodology (the use of telephone interviews), which

enabled us to canvass the views of people who might not have previously responded to a paper or online survey.

5. It is not yet known how the City Corporation's latest results compare to other landlords, as that information is not expected to be publicly available until later in 2024, following the submission deadline of 30 June 2024.
6. However, comparison can be made to information collated from satisfaction survey data collected in 2022/23. A report prepared by HouseMark on behalf of London Councils in April 2023 showed the performance of 25 local authority landlords in London. This data has been used above and in Appendix Two to give an indication of how the City Corporation compares to other local authority landlords in Greater London.
7. Members will note that, according to the HouseMark report, our most recent survey results exceed the 2022/23 median for London Councils in each of the 12 areas surveyed, with eight measures placed in the upper quartile. Our current results will be reviewed once the latest results for other landlords are published.

Wider Context for Social Landlords

8. Satisfaction levels should be viewed in the context of local issues and the many challenges affecting landlords nationally. National trends have shown declining tenant satisfaction for several years, for both local authority and housing association landlords. There was a notable drop in satisfaction in 2020, which could be explained in part by the survey coinciding with the first national lockdown.
9. Further detail about previous years' results can be found in Appendix Two (table two). Data collated by HouseMark from 189 social landlords in England showed that overall satisfaction has fallen for the past five years and, as of Q2 of 2023/24, stood at an average of 72.3% nationally.
10. Satisfaction levels also vary quite drastically depending on the size of the landlord and their location. For example, median satisfaction levels for large, urban local authorities stood at 62.3% at the end of September 2023, with smaller housing associations outside large urban centres reporting a median of 77.5% satisfaction.
11. The picture for local authority landlords in London appears less favourable when viewed in the national context, however it should be remembered that these landlords operate within a more challenging environment, with more severe overcrowding, older and higher-density stock in need of more maintenance, a higher proportion of high-rise residential buildings and higher costs for repairs and maintenance.
12. The latest information (published in April 2023) for local authority landlords in London shows a median overall satisfaction level of 60.2%, with a range from 37% to 73%.
13. Our lowest performing measure is complaints handling, which is true of most landlords. Tenant satisfaction with complaints handling is low across England;

HouseMark analysis in Q2 of 2023/24 showed that 34% of tenants were satisfied with their landlord's handling of complaints. In London, the median figure for local authorities in 2022/23 was even lower at 25.5%. Our current performance of 38.3% compares relatively favourably when viewed within this context, however this will be an area in which service improvements are targeted in order to increase service performance and tenant satisfaction.

Response Rates

14. The use of telephone surveys enabled a higher response rate than in previous years, when only paper or online surveys were used. This more active approach enabled the collection of 335 responses from tenants, giving a survey rate of 18% of tenant households. This response rate meets the expectations of the Regulator for Social Housing and gives a high confidence level on the accuracy of the results.
15. In previous years, the response rate was much lower; for instance, in 2022/23, 233 responses were received from tenants (12% return) and the combined tenant and leaseholder return was only 329. Prior to that, response rates had often been much lower and in some years only just exceeded 300 total responses for tenants and leaseholders.
16. Using telephone surveys also enabled us to contact a wider range of residents, including those who might not have responded to a paper or online survey.

Additional Questions on Cost of Living Impact

17. We used the survey as an opportunity to ask additional questions related to the impact of the cost of living crisis on our tenants (please see table three in Appendix Two).
18. The responses show that 11% of respondents said they struggled with paying rent or service charges (70% said they did not), while 25% of tenants reported that they struggled to pay utility or fuel bills.
19. A notable proportion of respondents said that, while they do not currently struggle to pay rent or household bills, they are concerned about the future (i.e. potential price increases or changes in their income). In the case of utility and fuel bills, 18% of tenants said they were worried about their future ability to pay.

Future Surveys

20. The completion of the first TSM survey under the new regulatory regime provided a useful exercise for the Housing Division and several improvements will be made when the survey is conducted again later in 2024:
 - Better introductory publicity to residents, informing them that the survey will be taking place and that an independent organisation will be carrying it out. It is proposed that each household will be written to in advance of the survey for 2024/25. This is intended to address concerns that some tenants had about

being contacted on our behalf by Acuity, as they had not seen the communications sent out via our mailing list and newsletters.

- We will consider setting a higher target return rate and surveying more tenants than the required statistical minimum, to increase participation and give additional assurance that the results reflect current satisfaction levels
- Some improvements will be made to the format of the survey communications, in response to feedback received this year, including making it clear that survey invitations are personal to each household and should not be forwarded

21. It is proposed that, with the exception of the changes mentioned above, the same methodology is maintained for future surveys, to enable more useful comparison to be made year on year. Prior to the introduction of the TSMs, a 'STAR' survey (survey of tenants and residents) was used. The questions were not prescribed as the TSMs are, and landlords were not required to complete the survey every year or report the data to the Regulator. Methodologies varied between years and there was no requirement, as there now is, to ensure that the results were statistically significant. Care should therefore be taken in making comparisons with older survey results, however they have been included to give an indication of trends over time.

Responding to the Results

22. Further analysis of the results will now take place, to determine how the information can best be used to inform service improvements. Members will be aware of the Resident Focus Project, which aims to make improvements to customer services across Housing and Property Services functions. The results of this survey will be used to identify priority areas for service improvements and, where appropriate, the satisfaction results will form the basis of a measurable target for future performance.

23. This report is intended to bring the results to Members' attention at an early stage and a further report will be submitted to inform Members in more detail about the steps to be taken to support improvements to the results. This will include further comparative data once this becomes available.

24. The results will also be published to residents through the website, the @home magazine and monthly newsletter, and the 2023/24 Annual Report for Tenants.

Leaseholder Satisfaction Survey

25. Members may recall that the TSMs are applicable only to homes for social rent, or shared ownership. However, we are completing a survey to measure leaseholder satisfaction, though these results will not form part of the return to the Regulator. At the time of writing, the survey was still underway and is due to be completed in January 2024.

Conclusion

26. From 1 April 2023, the Regulator for Social Housing has required landlords to collect annual tenant satisfaction data against a new set of specified measures, with the results for 2023/24 due to be returned to the RSH by 30 June 2024.
27. The Housing Division completed its first mandatory TSM survey in late November 2023 and the overall satisfaction rate with services was 66.9%.
28. Officers are due to complete further analysis of the results and identify ways in which they can be used to inform service improvement initiatives, for instance those planned or underway as part of the Resident Focus Project.
29. A further report will be brought to this Sub-Committee containing more detail about the steps to be taken to support improvements to the results, as well as comparative data for other landlords once this is publicly available.

Appendices

- Appendix 1 – Tenant Satisfaction Measures
- Appendix 2 – Data tables

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