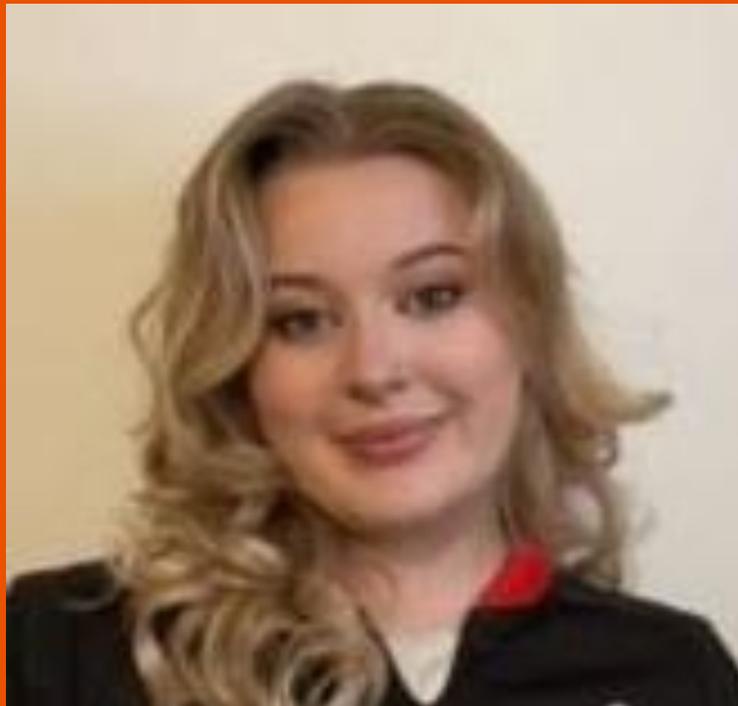


# What Wales can learn from England's Tenant Satisfaction Measures



**David Wilton**  
**Chief Exec**

**Caitlin Brown**  
**Events & Comms**  
**Co-Ordinator**



**Since the late  
1990s,  
Housing  
Regulation in the  
4 Nations has  
gone on different  
paths**



# Quick Overview

## Scotland

- Local Authorities are included in regulation in Scotland
- The Regulator is a stand-alone organisation
- Traditionally good at transparency of data for comparison

## Northern Ireland

- 85% of social homes in NI are owned and managed by NI Government under 'The Housing Executive'
- There is no local authority housing, but there is a small but growing housing Association presence
- 'The Executive' are also the Regulator, the funder, policy etc

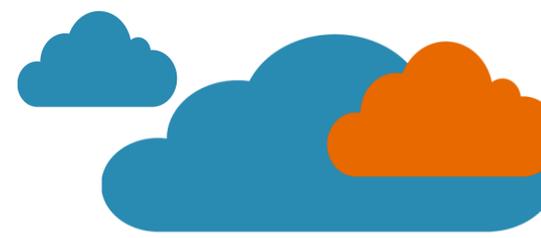
## Wales

- The regulator is an internal dept of Welsh Government housing.
- Local Authorities are not included. They get sporadic visits from Audit Wales
- Welsh HA are judged on 2 categories (Governance and Finance)

# Welsh Regulation Standards

Rating	Governance (including Service Delivery)	Rating	Financial Viability
Green	The RSL meets our requirements.	Green	The RSL meets our requirements.
Yellow	The RSL needs to make improvements in some areas to continue to meet our requirements.	Yellow	The RSL meets our requirements and needs to continue to manage material risks to maintain this position.
Amber	The RSL does not meet our requirements and is working closely with the Regulator to ensure that serious regulatory concerns are addressed.	Amber	The RSL does not meet our requirements and is working closely with the Regulator to ensure that serious regulatory concerns are addressed.
Red	The RSL does not meet our requirements, and it is necessary to take statutory action in response to serious regulatory concerns.	Red	The RSL does not meet our requirements, and it is necessary to take statutory action in response to serious regulatory concerns.

# About English Regulation:



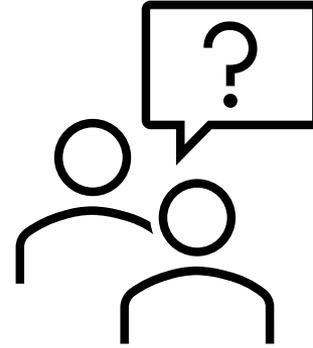
Stand-alone  
Regulator of Social  
Housing.

200 housing  
associations with  
stock of 1,000  
homes, and above.

Officially 800 HA  
which includes  
smaller niche RSLs,  
subsidiaries, for  
profit RSLs, etc

Scrutiny plays a big  
role and landlords  
need to evidence  
supporting tenants  
to scrutinise. '

The Regulatory test to landlords is:



**'What have you  
changed as a  
result of tenant  
engagement?'**

**'Regulations are the floor,  
not the ceiling'**

**'Regulators are not great at  
encouraging or regulating  
innovation.  
– needs to come from  
organisational culture'**



Regulator of  
Social Housing



# HA get 3 GRADES



Governance (G1-G4)



Financial viability (V1-V4)



Customer Satisfaction (C1-C4)

Governance		Viability		Consumer	
Grade	Description	Grade	Description	Grade	Description
G1	Our judgement is that the provider meets our governance requirements.	V1	Our judgement is that the provider meets our viability requirements and has the financial capacity to deal with a wide range of adverse scenarios.	C1	Our judgement is that overall, the landlord is delivering the consumer standards outcomes. The landlord has shown that it identifies when issues occur and puts plans in place to remedy them and help prevent them happening again.
G2	Our judgement is that the provider meets our governance requirements but needs to improve some aspects of its governance arrangements to support continued compliance.	V2	Our judgement is that the provider meets our viability requirements. It has the financial capacity to deal with a reasonable range of adverse scenarios but needs to manage material risks to ensure continued compliance.	C2	Our judgement is that there are some weaknesses in how the provider is delivering against the consumer standards outcomes and improvement is needed
G3	Our judgement is that the provider does not meet our governance requirements. There are issues of serious regulatory concern and in agreement with us the provider is working to improve its position.	V3	Our judgement is that the provider does not meet our viability requirements. There are issues of serious regulatory concern and in agreement with us the provider is working to improve its position.	C3	Our judgement is that there are serious failings in how the provider is delivering against the consumer standards outcomes and significant improvement is needed.
G4	Our judgement is that the provider does not meet our governance requirements. There are issues of serious regulatory concern, and the provider is subject to regulatory intervention or enforcement action.	V4	Our judgement is that the provider does not meet our viability requirements. There are issues of serious regulatory concern, and the provider is subject to regulatory intervention or enforcement action	C4	Our judgement is that there are very serious failings in how the provider is delivering against the consumer standards outcomes. The provider must make fundamental changes so that improved outcomes are delivered.



# Points to note



Local Authorities **are not** regulated for Governance and Financial viability **BUT ARE** regulated for the Customer Satisfaction Standards



The English Regulator is not afraid to dish out C3 judgements on Customer Satisfaction.

## Quick TSM overview

22 tenant  
satisfaction  
measures, over  
5 themes

10 measured by  
landlord's data

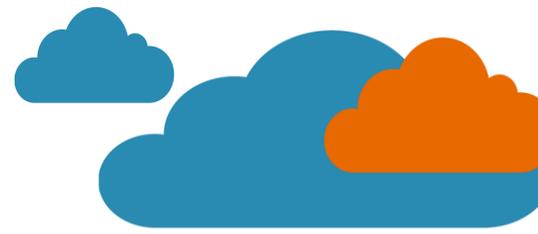
12 measured by  
tenant perception  
surveys



- TP01: Overall satisfaction
- TP02: Satisfaction with repairs
- TP03: Satisfaction with time taken to complete most recent repair
- TP04: Satisfaction that the home is well-maintained
- TP05: Satisfaction that the home is safe
- TP06: Satisfaction that the landlord listens to tenant views and acts upon them
- TP07: Satisfaction that the landlord keeps tenants informed about things that matter to them
- TP08: Agreement that the landlord treats tenants fairly and with respect
- TP09: Satisfaction with the landlord's approach to handling complaints
- TP10: Satisfaction that the landlord keeps communal areas clean and well-maintained
- TP11: Satisfaction that the landlord makes a positive contribution to neighbourhoods
- TP12: Satisfaction with the landlord's approach to handling anti-social behaviour

12 categories  
Tenants are asked  
to give their  
opinion.

# Landlord supplied data for 10



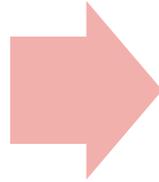
- CH01: Complaints relative to the size of the landlord
- CH02: Complaints responded to within Complaint Handling Code timescales
- NM01: Anti-social behaviour (ASB) cases relative to the size of the landlord
- RP01: Homes that do not meet the Decent Homes Standard
- RP02: Repairs completed within target timescale
- BS01: Gas safety checks
- BS02: Fire safety checks
- BS03: Asbestos safety checks
- BS04: Water safety checks
- BS05: Lift safety checks

# What are the key takeaways from the English Tenant Satisfaction Measures Report?



# CONTEXT MATTERS

This is NOT about how to  
manipulate or massage  
customer satisfaction  
figures



This is about ability to  
scrutinise and compare  
data with confidence

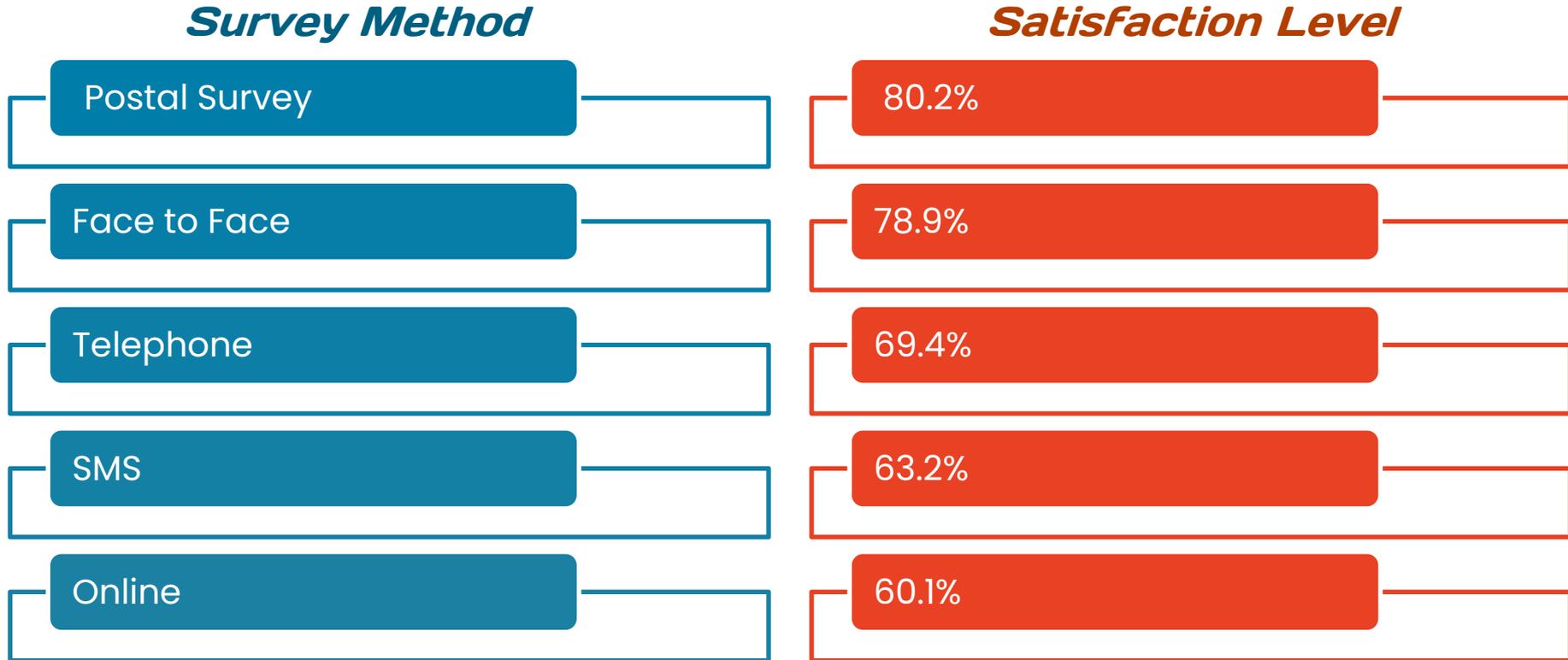


# Channel Matters

**English Landlords  
can choose how  
to run their  
surveys...**

**But they get very  
different results  
depending on  
channel**

# Different survey methods results in different satisfaction levels



## Face-to-Face vs Telephone Surveys

**There was a 5% increase in Face-to-Face surveys - likely increasing overall satisfaction rates**

- GreenSquareAccord (25,000 homes) saw a 14% increase in tenant satisfaction after introducing face-to-face surveys

**Face-to-Face surveys don't always yield higher satisfaction rates**

- The top two social landlords with the highest satisfaction rating came from telephone surveys – these were Cross Keys Homes (92%) and Livin Housing (91%)

# Who Asks Matters

**Only 15% of English Landlords conduct the survey themselves, 85% outsource to external contractors**

Telephone Overall  
Average Satisfaction Rate

71.1%

External Contractors

78.4%

In-House Staff

Face-to-Face Average Overall  
Satisfaction Rate

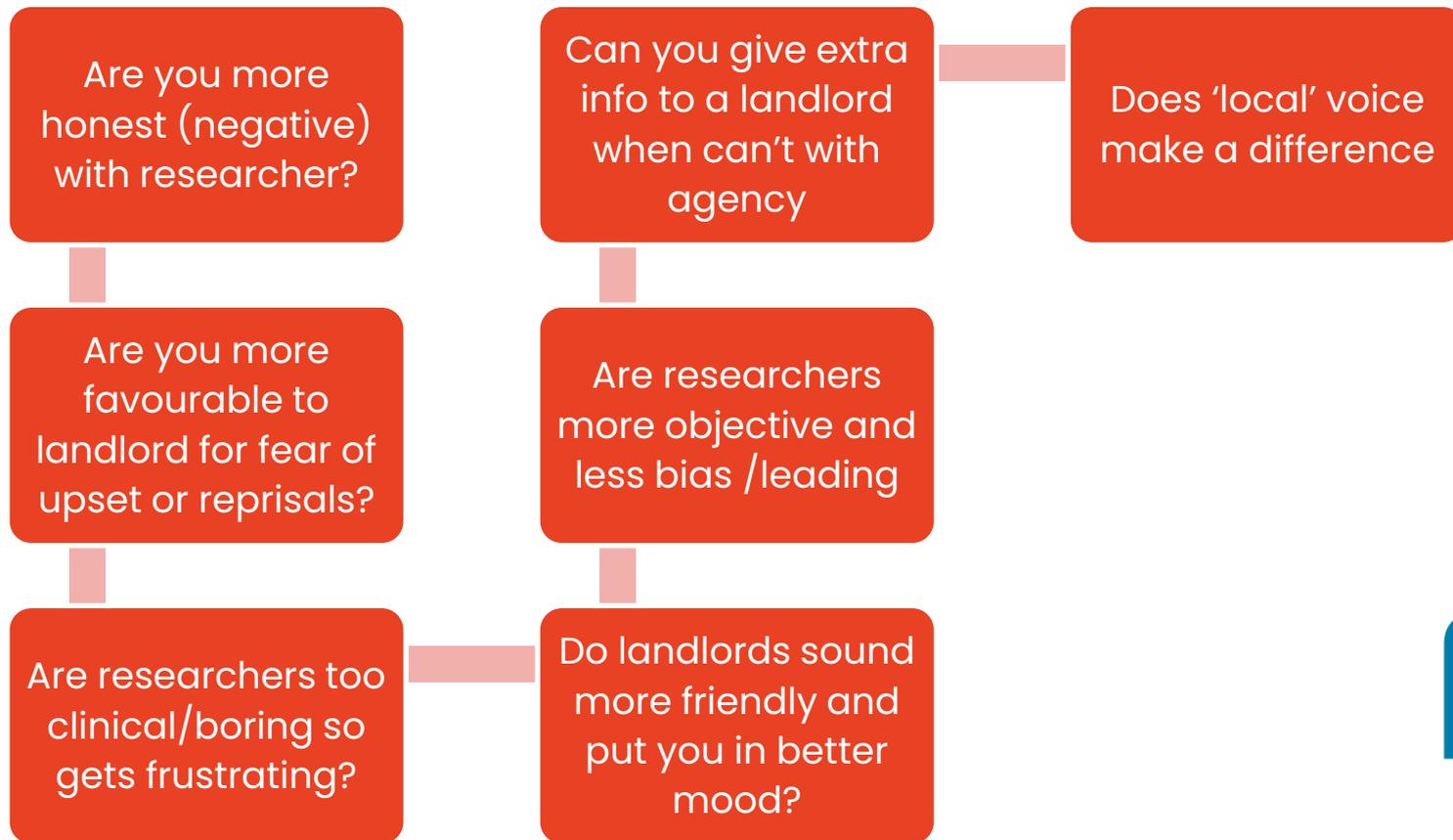
64.9%

External Contractors

75.4%

In-House Staff

# THINKPOINT - why the difference re who asks?



# Location Matters

Local context has a big impact on results

Tenants living in **London** are far less satisfied (**61%**) than tenants in the **Midlands (76%)** or the **North (77%)**



**Satisfaction**



**RSL  
average**

**Time**

# Organisation Matters

Councils score lower than Housing Associations

**WHY?**

Less Money?

Lower Service?

Lower Tenant Perception?

Lack of dedicated communications?

Judged as part of the wider Council view?

# ALMOs vs Local Authority

ALMOs scored better than Local Authorities on most TSMs

Arms-length management organisation (ALMO) is a not-for-profit management company on behalf of a local government.

Ownership of the housing stock itself stays with the local authority

ALMOs in England are declining

2010 = 65

2016 = 35

2025 = 18

# **ALMOs vs Local Authority**

ALMOs scored better than Local Authorities on most TSMs

## **THINKPOINT - Organisation**

**LA, ALMO and HA?  
Do LAs need to create  
better identity and  
branding?**

# Size of Stock Matters



## THINKPOINT



Does getting bigger mean losing connection with your tenants?

# Regulation Matters

Those facing regulatory action tend to score lower in satisfaction levels



Financial  
Challenges



Poor  
Governance



Bad Press

# Shared Ownership/LCHO Matters

Shared ownership satisfaction rates are often very low (between 10% - 20%)

Low satisfaction rates from shared owners are included in the overall landlord average



**Shared ownership drags down your scores!**



## But does it?

- **'For-profit' social housing providers perform better than benchmarks .**
- There are technically 69 registered, but only a few decent sized ones. They have approx 40,000 homes between them.
- I can understand higher scores at they newer, and they've bought up lots of new S106 properties.
- However, according to UK Gov data 'The majority of the stock owned by for-profit providers is shared ownership (57%)'.

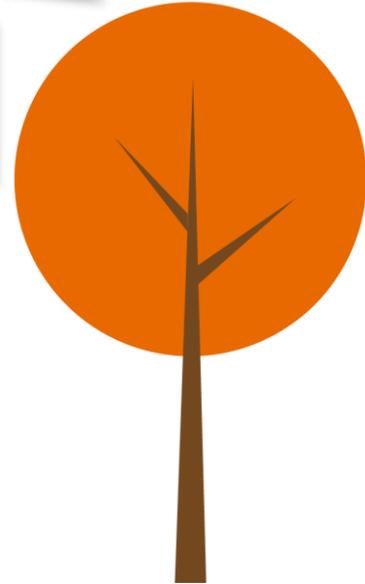
**Surely Shared Ownership should drag them down?**



# Complaints Matter

Complaint TSMs need to be carefully interpreted – higher number of complaints is not inherently a bad thing.

However, complaint satisfaction ranks lowly amongst tenant satisfaction measures:



# Does time of year matter?



“Large landlords can do surveys at any point during the reporting year”

“In practice, many large landlords run rolling surveys so there are results received through the year”.

“We have not published analysis relating to survey timing and impact on satisfaction.”

# Tenant Awareness Matters

Around 500,000  
surveys were  
completed for  
2024/25



That equates to 1  
in 8 households  
in social housing  
feeding into  
TSMs

## Is this enough?

### **TPAS England:**

More work needs to be done on the minimal awareness.

### **Mr Caritas Charles:**

"Tenants can't hold landlords to account with information they don't know exists"

# Tenant Engagement Matters

Satisfaction that the landlord treats tenants with fairness and respect is one of the highest scoring perception TSM results

**Landlord Listens  
and Acts**

62%

**Keeps Tenants  
Informed**

72%

**Fairness and  
Respect**

78%

Better tenant  
engagement =



Higher tenant  
satisfaction



**Local  
authority**

**Large  
Stock**

**London  
based**

**Online  
survey**

**+ Outsource and have large  
ratio of Shared owners**



# Example: Havering Council

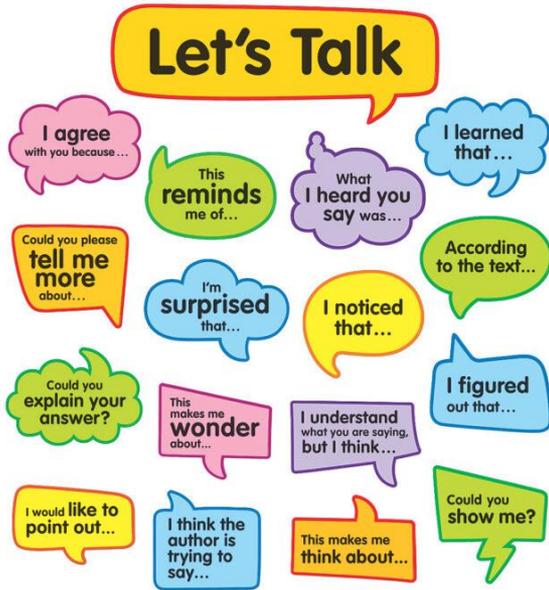
One of those 'perfect storms'  
London Council (Havering) did  
online only !!!

× They got 44%

**Next time they switched to  
telephone survey.**

✓ They said this approach,  
combined with improvements to  
its complaints service, raised its  
overall satisfaction score from  
44% to 71%.

# Summary : Comparing Satisfaction Data is not exact science



**IT'S A CONVERSATION STARTER**

# A Call to Action: 5 'Asks' from Tenants in Wales



# TPAS Cymru's 5 Asks

## Ask 1



### Creating and implementing a Welsh Social Housing Charter

TPAS Cymru does not wish to simply copy Scotland. Instead, we call on:

- The next Senedd Government to commission, within its first year, a task and finish group made up of regulators, social housing tenants, housing staff and others to co-produce a Welsh version of a Social Housing Charter, tailored specifically to the needs of Wales.
- This should include Local Authority housing as well as Housing Associations (in line with the Scottish model).

## Ask 2



### Develop transparent and inclusive Regulation Standards

In England, regulation has been strengthened. Landlords are now assessed across **three** separate pillars of good social housing, with a separate grade for **Customer satisfaction**.

This approach makes it much clearer for tenants, boards and the wider public to understand a landlord's relative strengths and weaknesses.

# DISCUSSION

Channel

Who Asks

Location

Organisation

Size of Stock

Regulation

Shared  
Ownership

Complaints

Tenant  
Awareness

Tenant  
Participation