



Scottish Housing Regulator

National Report on the Scottish Social Housing Charter Headline Findings 2016/17

August 2017



About us

We are the independent regulator of social landlords in Scotland.

We regulate:



nearly
200
social landlords



around
160 Registered Social Landlords (RSLs)



32 Local Authorities (LAs)

We safeguard and promote the interests of:



nearly
610,000
tenants

who live in homes provided by
social landlords



around
118,000
owners

who receive services of social
landlords



around
40,000
**people and
their families**

who may be homeless and seek
help from local authorities



over
2,000
Gypsy/Travellers

who can use official sites
provided by social landlords

Our role

Is to monitor, assess and report on social landlords' performance of housing activities and RSLs' financial well-being and standards of governance. We intervene, where we need to, to protect the interests of tenants and service users.

Our **Regulatory Framework** explains how we regulate social landlords. It is available on our website www.scottishhousingregulator.gov.uk

Our National Reports

Provide an analysis of the information reported to us by Scottish social landlords on their performance in achieving the standards and outcomes in the [Scottish Social Housing Charter](#).

In this report we outline our analysis of landlords' Annual Return on the Charter (ARC) for 2016/17. It covers the same areas as our landlord reports and is published alongside them on 31 August. We comment on:

- » landlords' progress towards achieving the Charter standards and outcomes; and
- » the extent to which landlords have improved the services they provide to tenants and other service users.

We use the findings from our analysis to inform our regulatory activity and engagement and in our annual risk assessment of RSLs and local authorities.

This year for the first time we also provide [data tables](#). These tables show:

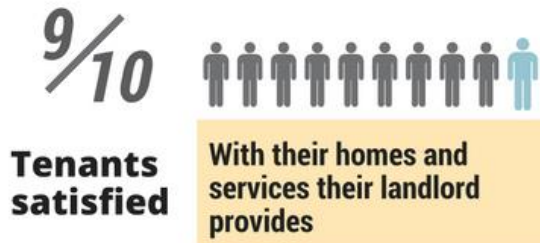
- performance in the social housing sector over the last four years;
- performance in both RSL and local authority housing separately; and
- the change in performance for the social housing sector since last year.

What's inside

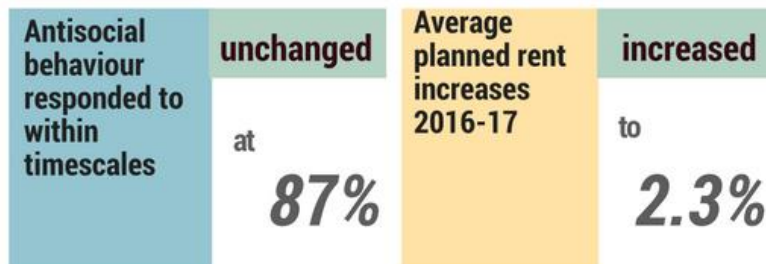
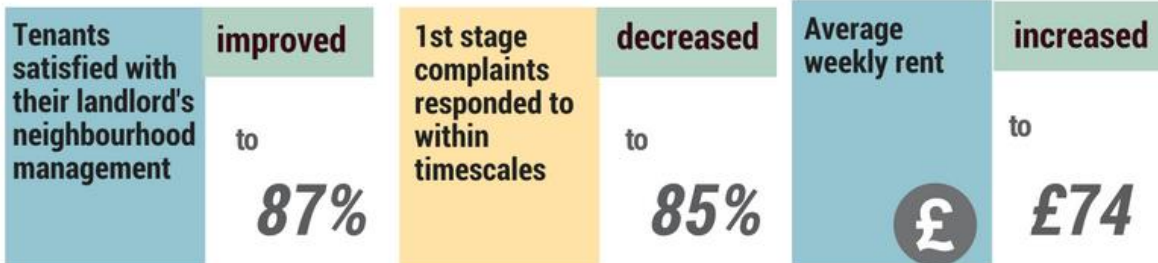
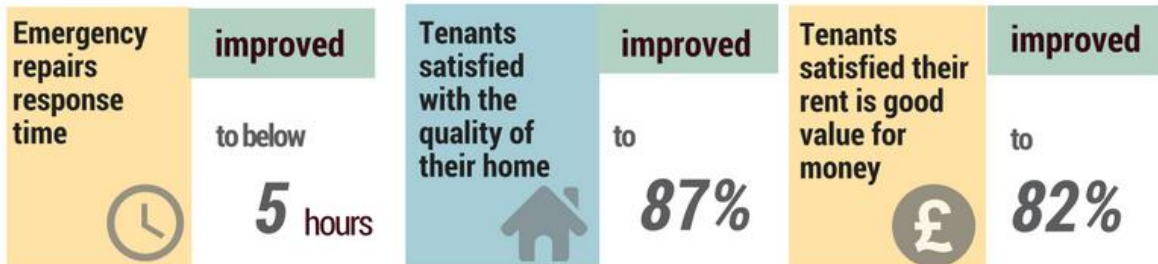
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Key results

The general picture



Services that matter most to tenants



The Charter indicators above show the overall national average and the change since last year.













Progress on the Charter

Landlords are maintaining good performance across the majority of the Charter outcomes

Scottish social landlords continue to perform well across most of the standards and outcomes of the Scottish Social Housing Charter.

We reported steady improvement in performance across most Charter outcomes in our 2013/14, 2014/15 and 2015/16 National Reports. Landlords are maintaining that strong performance.

Landlords continue to report strong performance in the service areas that are most important to tenants.

Charter Outcomes	Progress
Equalities	
Communication	
Participation	
Quality of housing	
Repairs, maintenance & improvement	
Estate management, anti-social behaviour, neighbour nuisance & tenancy disputes	
Housing options and access to housing	
Tenancy sustainment	
Homeless people	
Value for money	
Rent and service charges	
Gypsy/Travellers	

Services that matter most to tenants & service users



Homes & rents

In 2016/17 Scottish social landlords provided 583,941 homes available to rent, down by 770 from the year before. The number of local authority homes fell by 2,300 while the number of RSL homes increased by 1,530.

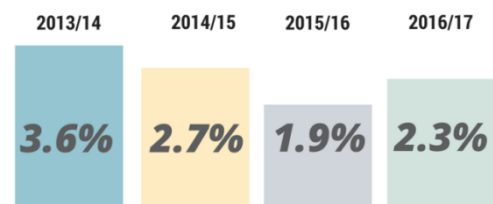
583,941 homes available to rent



Average weekly rents

The average weekly rent for Scottish social landlords was over £74 in 2016/17, up 2.1% on the previous year. Average local authority rents are £11 lower than average RSL rents. This gap is broadly the same as the previous year.

Average planned rent increases



Landlords' average planned rent increases have decreased from 3.6% in 2013/14 to 2.3% in 2016/17, but rose from 1.9% in 2015/16.

Average tenant satisfaction with rent being good value for money has also improved this year from 79% to 82%.

Average satisfaction with rent being good value for money



RSL tenant satisfaction is higher at 83% than local authority tenants at 78% satisfaction.

Our thematic inquiry on how social landlords consult tenants about rent increases said...

Landlords need to know what their current and future tenants can afford to pay when considering any increase to the rents they charge. We found some landlords engage well with their tenants about the costs and options of providing services and seek their views on potential rent increases. But other landlords need to do more to discuss with their tenants what they want their rent to pay for and what they can afford.

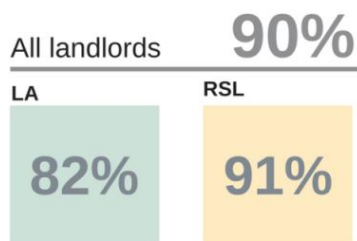


Tenant satisfaction

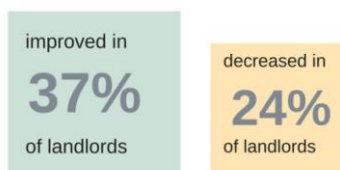
Overall tenant satisfaction remains at 90%

121 landlords collected new satisfaction survey data from tenants this year. The performance of over half of the RSL landlords within the 121 improved while around a quarter of the local authority landlords showed an improvement.

Overall tenant satisfaction



Average tenant satisfaction has



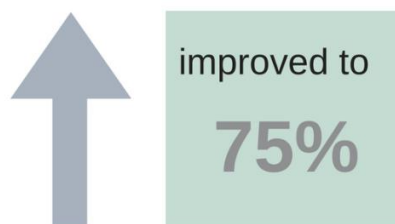
Quality of homes

Existing tenants' satisfaction with the quality of their homes is high – at 87% this year

Average satisfaction with the quality of homes has increased for RSL tenants to 88% and has declined for local authority tenants to 81% over the last year.

Landlords have until 2020 to meet the first milestone for the Energy Efficiency Standard in Social Housing. Landlords have reported to us that 74.5% of homes in the scope of EESSH already meet this standard.

Homes compliant with EESSH



Percentage of homes that meet the Scottish Housing Quality Standard





Other services

Mixed picture on satisfaction with other services

The Charter also covers performance of other services, including factoring, management of sites for Gypsy/Travellers and services for those who are homeless or at risk of becoming homeless.

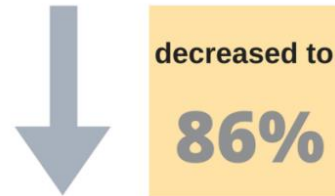
There is a more mixed picture of user satisfaction with these services this year.

Of those households homeless in the last 12 months, average satisfaction with temporary or emergency accommodation has slightly decreased to 86% from 87% last year.

Satisfaction amongst Gypsy/Travellers increased to 79% from 71% last year.

Owners' average satisfaction with factoring services has risen from 65% to 67% since last year. This is the third consecutive year of increasing satisfaction but levels of satisfaction with these services is still well behind those for other services provided by social landlords.

Average satisfaction with temporary or emergency accommodation



Average satisfaction amongst Gypsy/Travellers



Average satisfaction with factoring services





Repairs & maintenance

Overall landlord performance in repairs and maintenance is strong and continues to improve

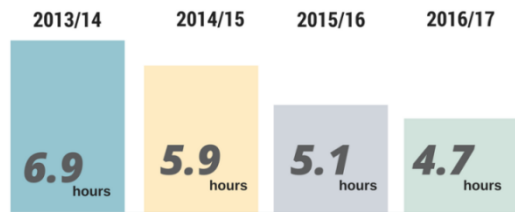
Landlords respond quickly on average to emergency repairs and non-emergency repairs.

Tenant satisfaction with repairs and maintenance remains high at 91% - this has improved steadily since 2012/13.

Average tenant satisfaction with repairs is higher for RSLs (91%) than for local authorities (86%), but there is a broader range of performance across RSLs.

Landlord performance on repairs completed right first time increased to 92% from 90% last year.

Average response times to emergency repairs



Non-emergency repairs completed right first time



Our National Panel of Tenants and Service Users tells us...

Repairs is one of the main things that many of the Panel think of when asked about value for money.

Panel members viewed value for money as being closely linked to the balance between rent levels and the standard of service received, particularly in relation to emergency repairs and overall response times.



Communication & participation

Most landlords are good at engaging with their tenants

Average levels of tenant satisfaction with being kept informed by their landlord remains at 91%, having improved steadily over the last four years.

RSLs perform better in this service area with 9 in 10 tenants satisfied compared to 8 in 10 tenants for local authorities.

For satisfaction with opportunities to participate, average tenant satisfaction has improved from 81% to 84% in the last year. Both RSL and local authority tenants expressed higher satisfaction than they did last year.

Tenants satisfied with opportunities to participate

LA

2013/14

2015/16

2016/17

63%

71%

72%

RSL

2013/14

2015/16

2016/17

81%

83%

86%

Our National Panel of Tenants and Service Users tells us ...

They value having multiple communication options and the landlord ensuring that each communication method is equally effective.

Landlords using communications flexibly, for example changing between telephone and face to face, adds to Panel members viewing them as responsive. This is important as telephone contact and emails are viewed as less responsive to more complex needs and more difficult for users who require support.

Want to know more?

You can see the landlord reports, comparison tool and data tables on our [website](http://www.scottishhousingregulator.gov.uk) www.scottishhousingregulator.gov.uk. For more analysis, a full dataset of all landlords' performance information is also available.

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