

ARC Data Release

Empowering Leaders and Managers

Online briefing
17th October 2024

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Housemark
Scotland



Housekeeping



Open 'people' to see a list of the attendees joining today's event.



We will make a recording of today's event for CIH & Housemark members to watch afterwards



The host will mute all attendees on arrival and during presentations.



Please use the 'chat' button to add questions, comments or share information throughout the event.



If someone asks a question you have in mind 'up vote' it by using the like icon.



We will look at the chat regularly throughout the event.

Who are Housemark?



Leading data and insight company for the UK housing sector



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



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

Get in touch

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What we do



Targeted data strategy and quality, VFM, compliance and service design consultancy



Make sense of a changing landscape and navigate change



Performance and cost comparisons at your fingertips



Shared learning and networking through our clubs and events



Save time, reduce costs and ensure compliance with Photobook

Agenda

1. Welcome and introductions
2. Why the ARC?
3. Sector overview
4. Tenant satisfaction
5. Responsive repairs
6. Lettings
7. Arrears
8. Damp & mould first look
9. Next steps

Hello!



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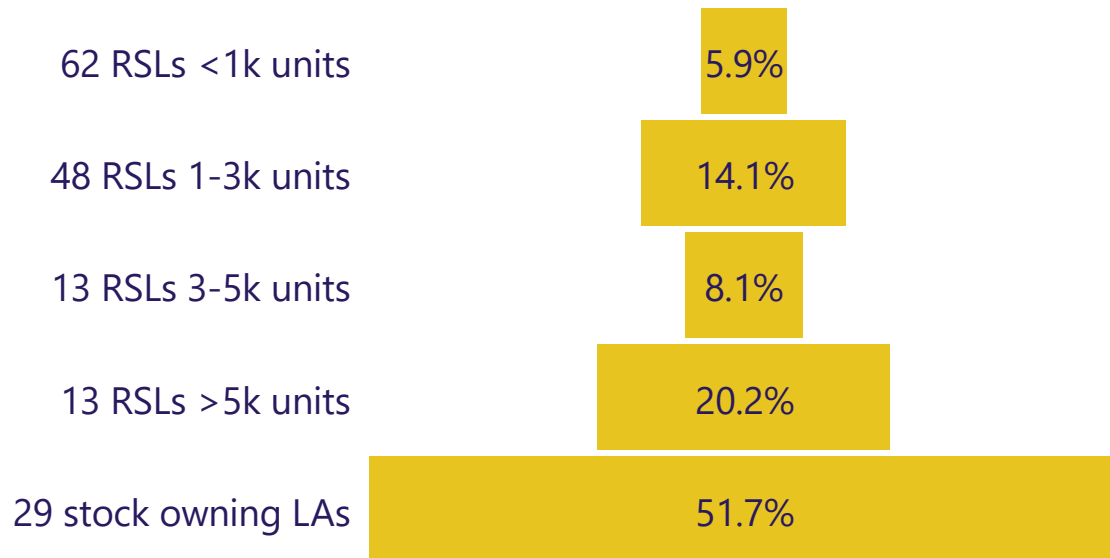
Why the ARC?

- Annual Return on the Charter (ARC)
 - It has existed in various forms since 2013/14 and is the most comprehensive social housing performance public dataset in the UK
 - Minor changes for 2019/20, and planned for 2025/26, but very little change in 10 years
- ‘Drowning in data, starved for insights’
 - Over 900,000 pieces of data in 10 years with 88,000 from 2023/24
 - With so much variation since March 2020 what’s important?
- What does ‘good’ currently look like?
 - In 2019/20 75% of the organisations could re-let in under 30 days, in 2023/24 only around 50% managed this

Sector overview

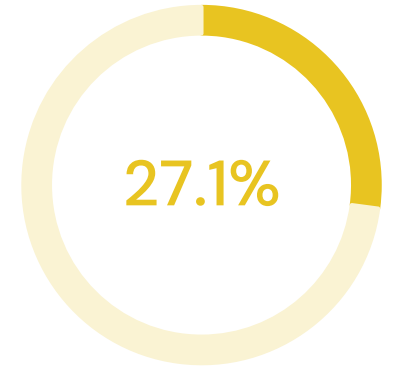
- Scottish social rented sector overall nearly 630,000 units, just under half owned by RSL's
- Multiple lenses to look at the sector. As we have an hour, we're going to break down into 5 reasonably broad categories
- Today we'll generally look at medians not mean averages

Sector Stock By Size/Type



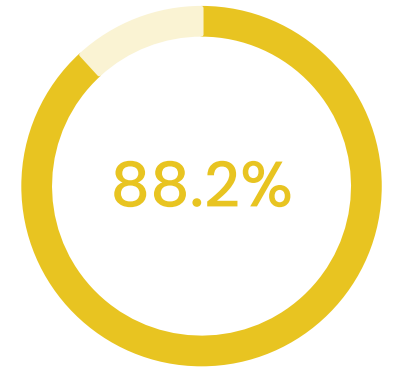
Landlords who had a gas fail in 2023/24

Percentage of landlords who didn't meet at least one gas safety check



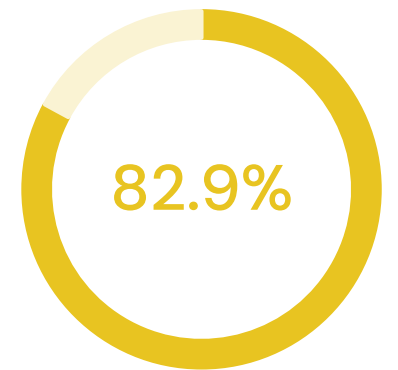
Median overall satisfaction in 2023/24

Sector median satisfaction of tenants with the overall service provided landlord



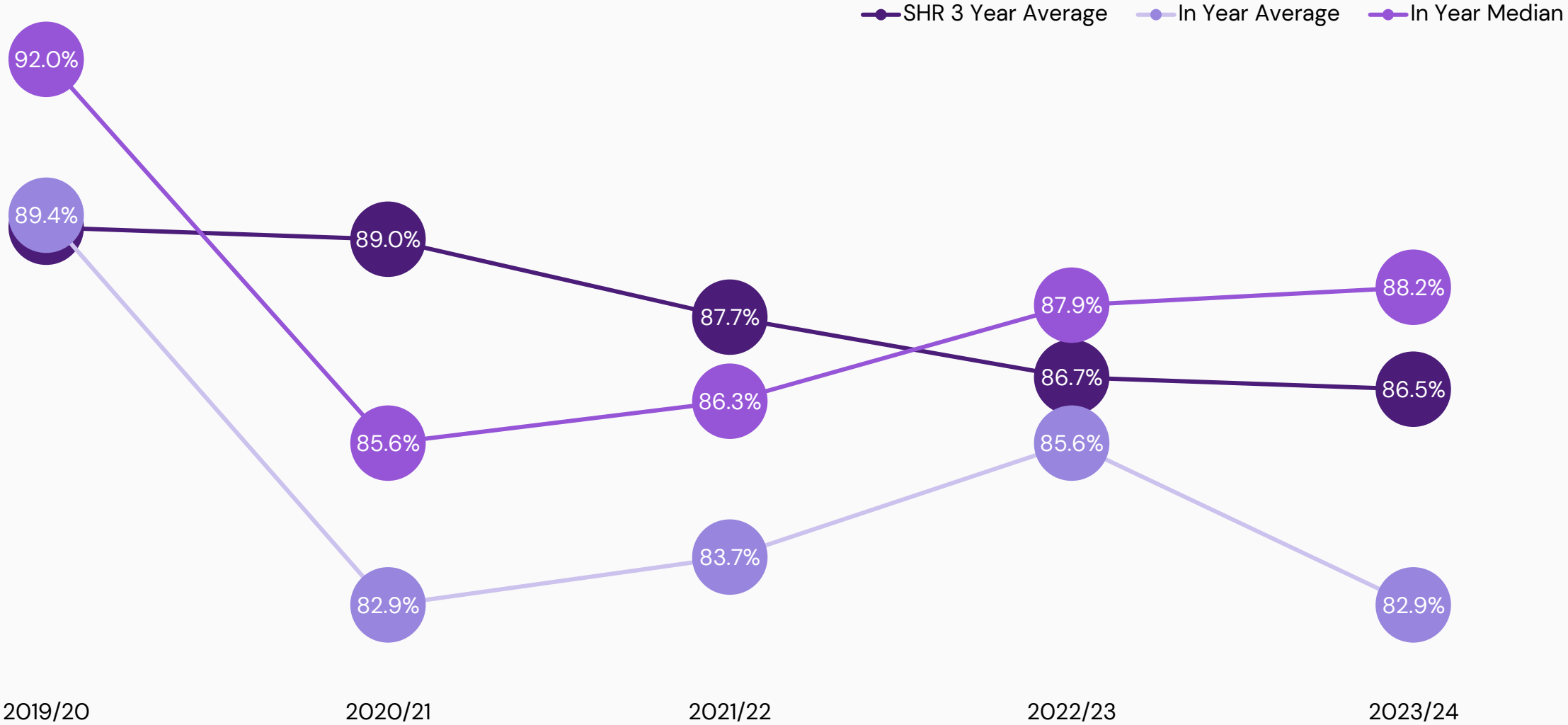
Mean overall satisfaction in 2023/24

Sector average satisfaction of tenants with the overall service provided landlord



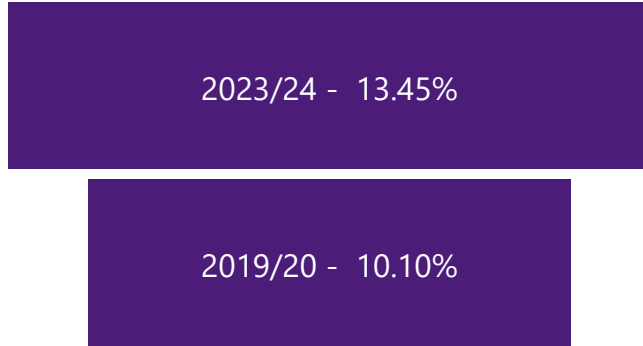
Overall tenant perception

Percentage of tenants satisfied with the overall service provided by the landlord

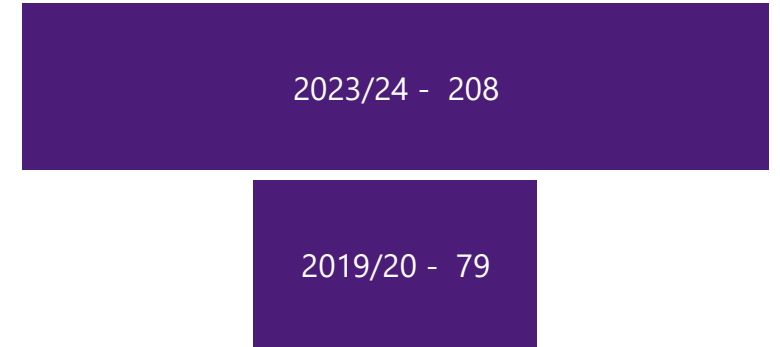


Key changes since 2019/20

UK voluntary staff turnover

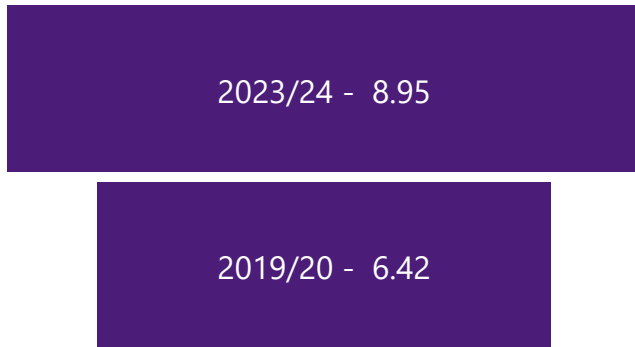


UK average call wait time in seconds

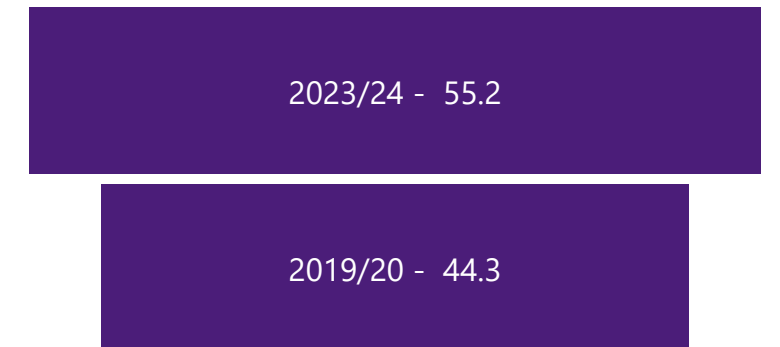


£1,000 more spent per property compared to two years ago

Non-Emergency Repairs Completion Times (Working Days)



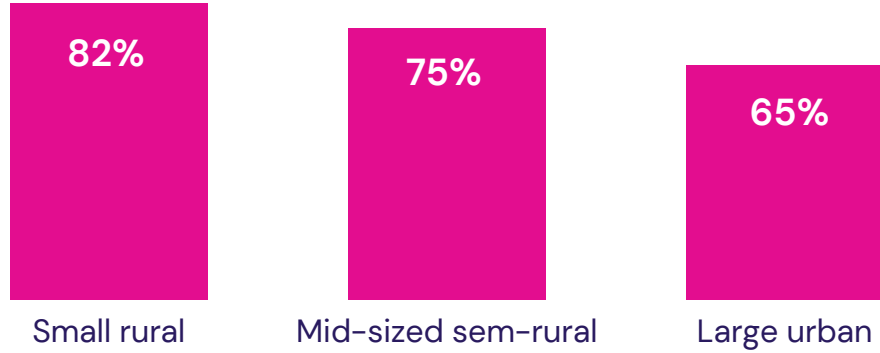
Stage 1 Complaints Per 1,000 Units



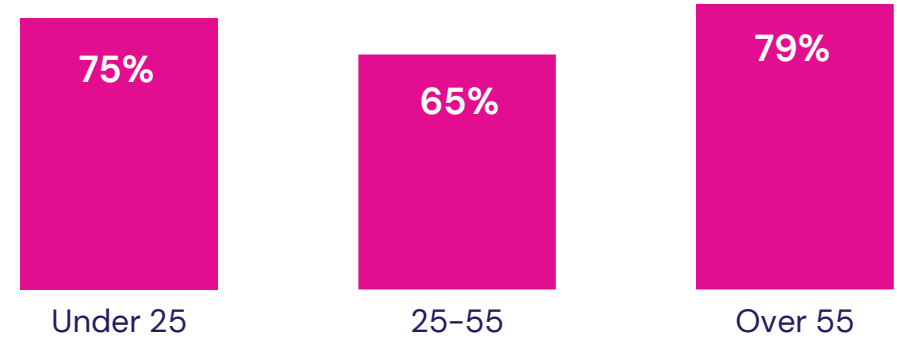
Survey biases

UK average overall satisfaction

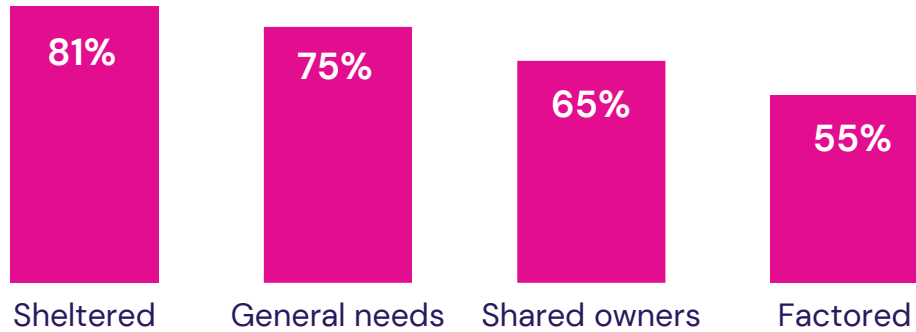
...by size and geography



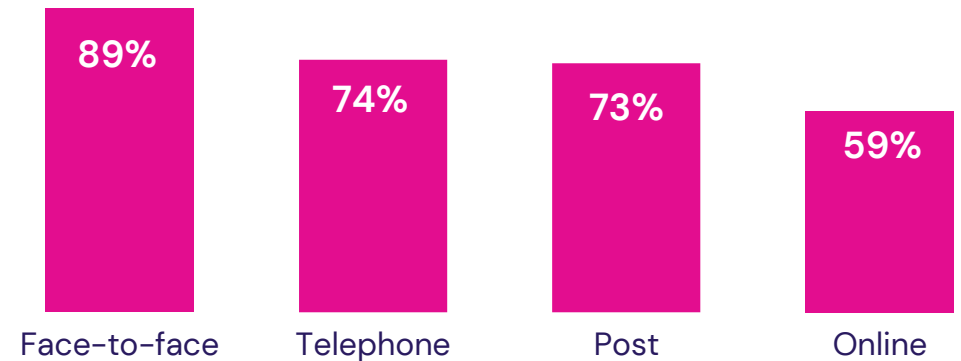
...by tenant age



...by tenure type



...by collection method



Key drivers

- Perception correlations
 - Easy to deal with
 - Quality of home
 - 'Cultural measures' – listening and acting
 - Repairs service
- Free text analysis
 - Speed of repairs / not completing repairs (30%)
 - Poor communication / hard to get hold of (20%)
 - Damp and mould (10%)
 - Vulnerability / not listening (10%)
- Operational correlations
 - Call wait-times
 - Repairs wait-times
 - Delivery model

Repairs satisfaction

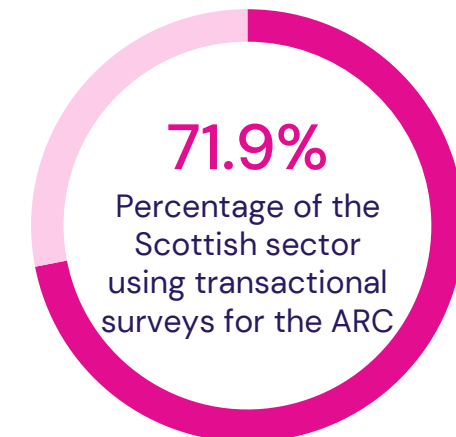
- For Indicator 12, repairs satisfaction there are differences in the methodology which impact the results
- When analysing the results it's possible to determine using the numbers surveyed which organisation uses which method; perception or transactional
- The perception surveys are part of the 3 yearly survey, transactional are asked separately after the repair is done
- From our research we've found that outstanding repairs, between **4%-12%** of yearly repairs volumes, has a big impact on perception
- The new Tenant Satisfaction Measures, introduced in England for 2023/24, only allow perception surveys on repairs to be reported to the English Regulator of Social Housing
- Adjusting for context, the average difference between perception and transactional is **15 percentage points**

Perception vs. transactional 2023/24 averages

Scotland overall average **87.3%**

Scotland perception average **81.4%**

Scotland transactional average **90.3%**



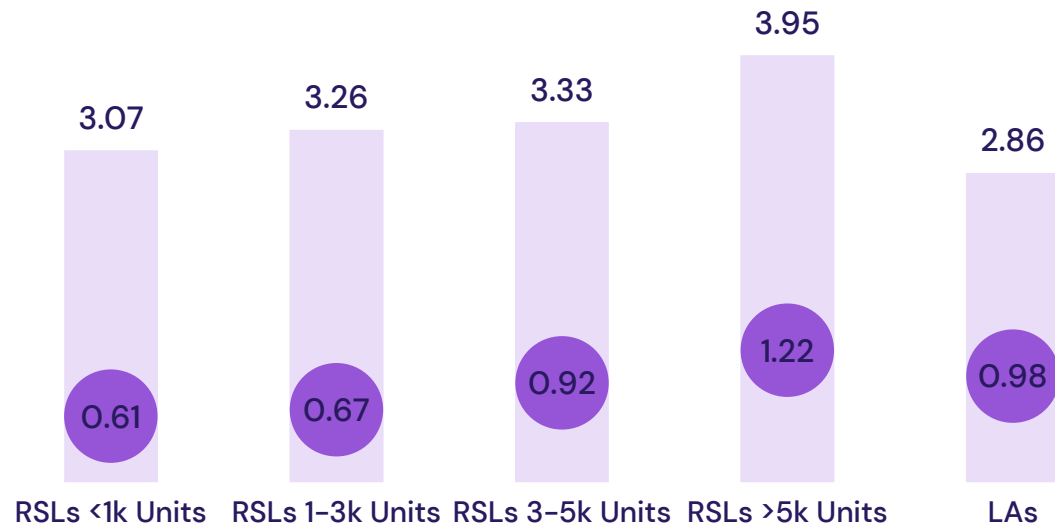
Repairs

- Across the sector there are an average of 3.2 repairs per property, 1 of these being an emergency repair
- Delivering these is getting more expensive; from Housemark's cost data the average cost of a responsive repair in 2023/24 is £160
- Generally, we've seen organisations with a lower ratio of emergency repairs have lower responsive repair costs

Median of the average repairs per property



■ Responsive repairs ● Emergency repairs



Wide variation in responsive repair split



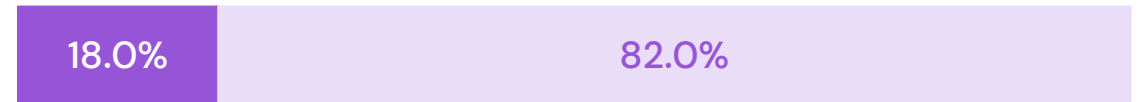
Medians of repairs split by emergency/non-emergency

■ Emergency ■ Non-emergency

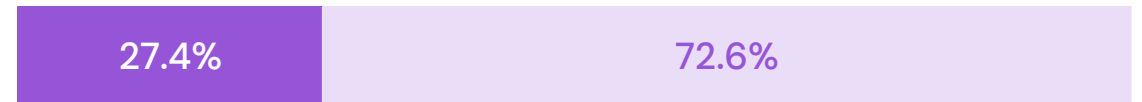
RSLs with less than 1,000 units



RSLs with 1,000 to 3,000 units



RSLs with 3,000 to 5,000 units



RSLs with over 5,000 units



Local authorities



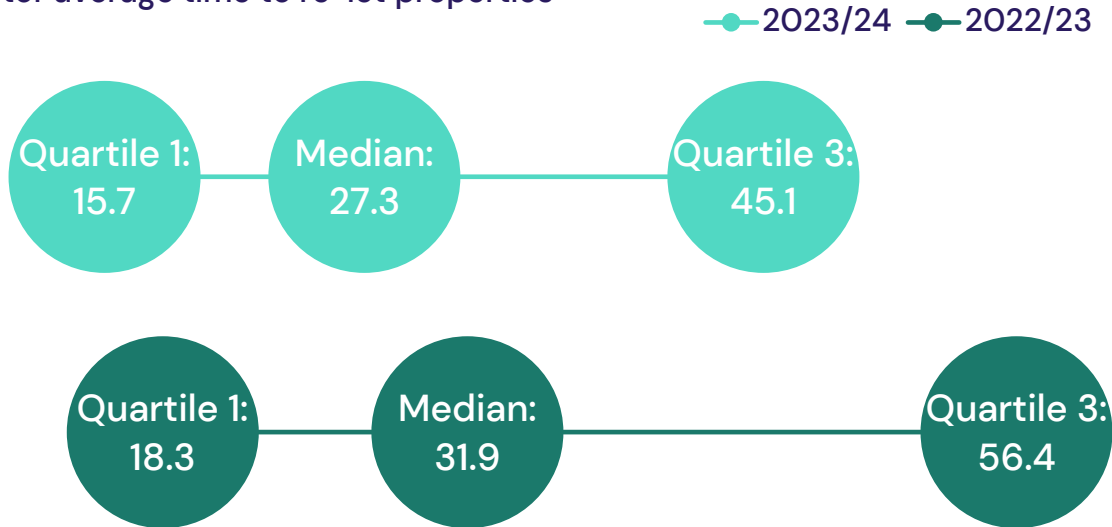
Letting

- While the sector mean average re-let went up slightly from 55.6 to 56.3 days, the picture is more complicated
- Organisations above quartile 3 performance have all improved since 2022/23, around 75% of the sector
- While less units are becoming vacant overall due to external pressures performance differs across the sector roughly tracking with average re-let times

Re-let Times Starting To Improve



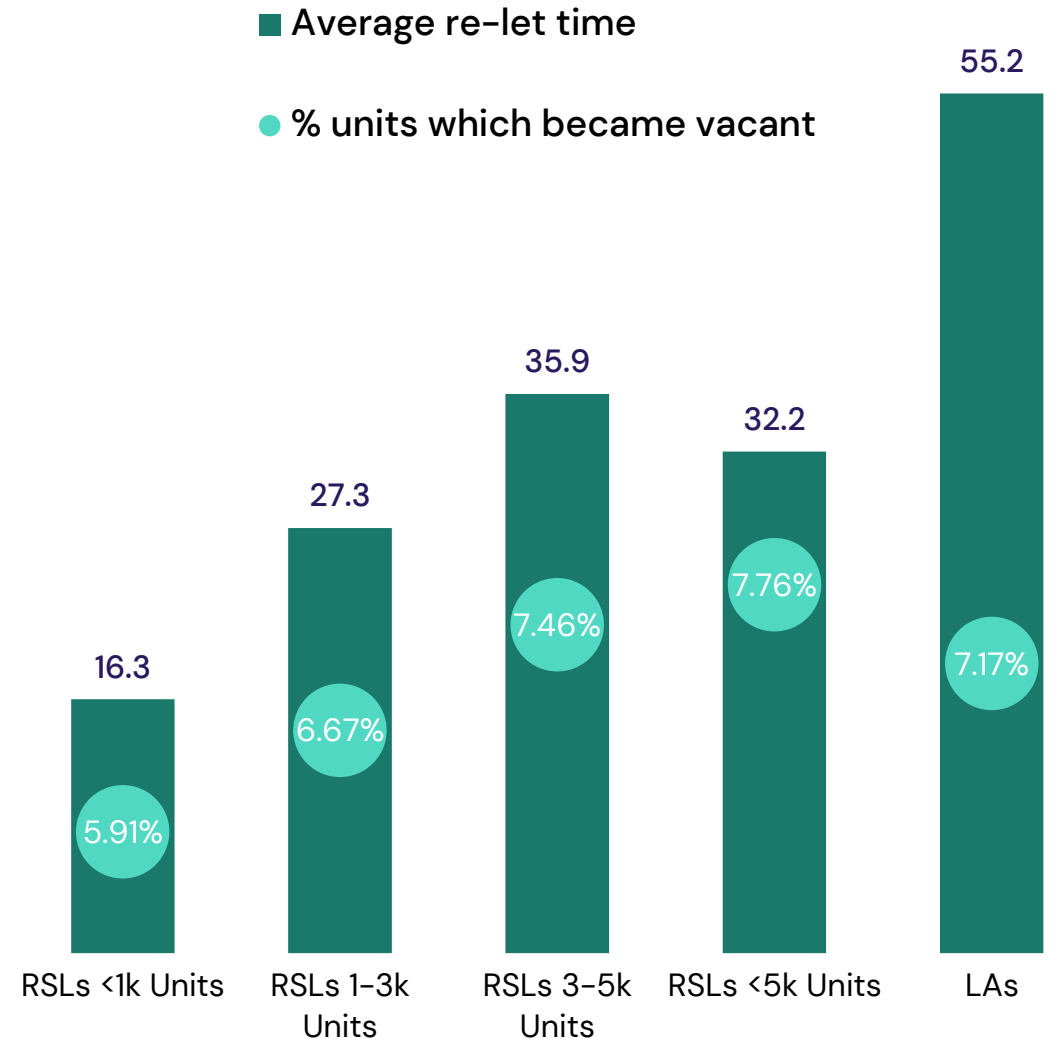
Sector average time to re-let properties



Wide variation in re-let times / turnover



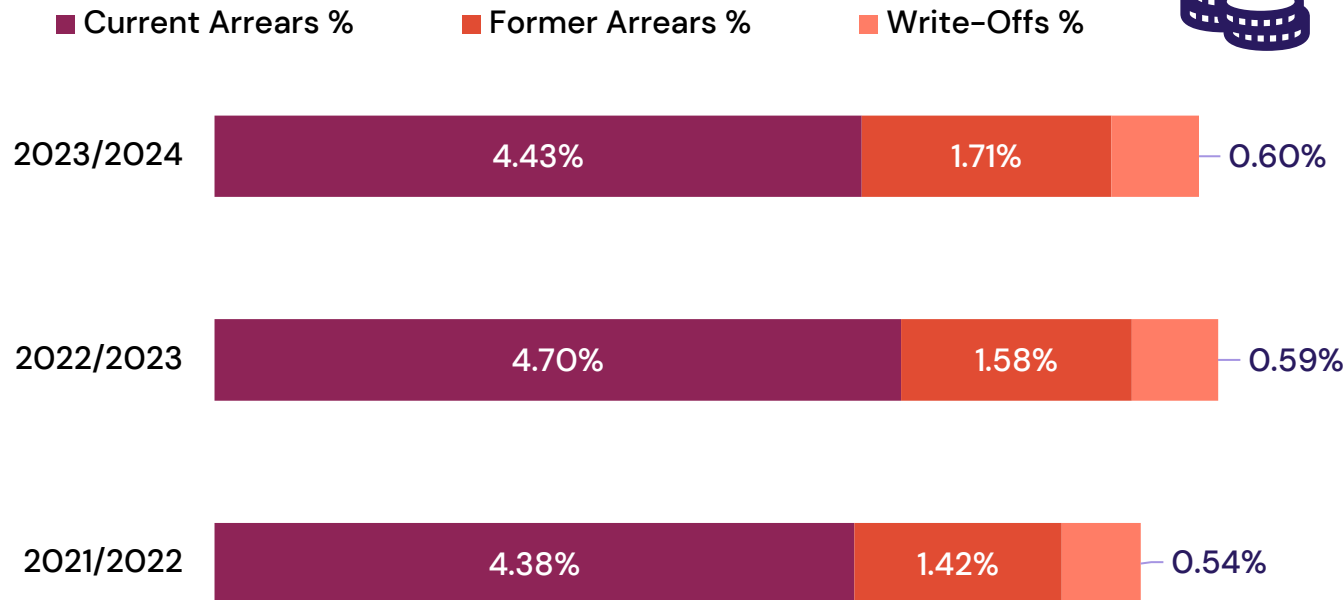
Medians of average re-let times & % units which became vacant in year



Tenant arrears

- While gross arrears have gone down, the main decrease has been in current tenant arrears with former arrears often increasing
- Given external pressures this has unsurprisingly tracked with an increase in staff dedicated to rent arrears collection, usually current tenant's arrears while housing management staff numbers overall stay fairly static

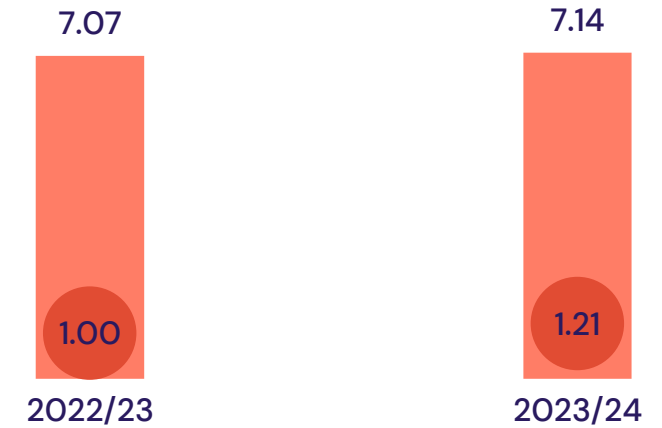
Average gross arrears breakdown across sector



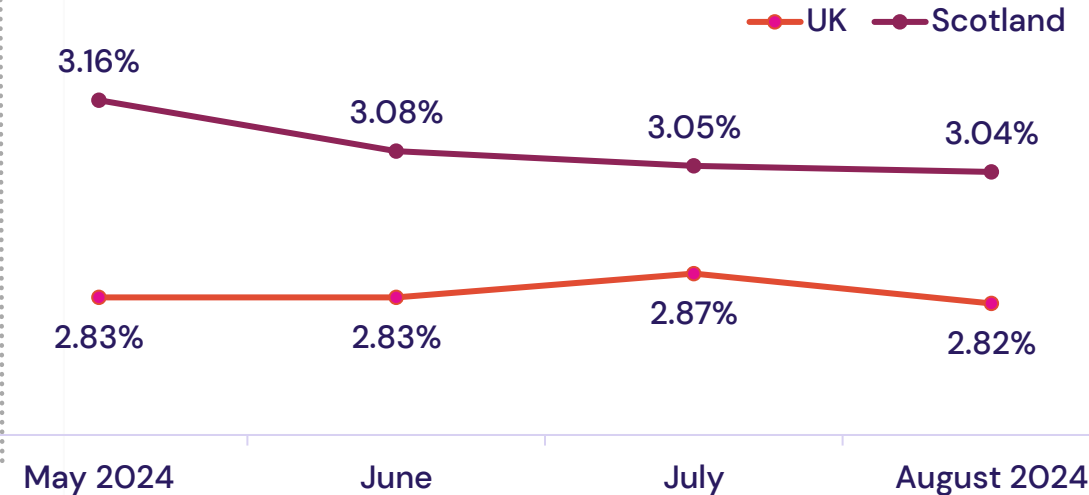
Housing Management Employees Per 1,000 Units



- Housing Management Overall
- Specialist Rent Arrears



'True' Current Arrears Over 2024/25



Taking a proactive stance on damp and mould

Housemark has developed new KPIs covering the size and scale of damp and mould caseloads across the UK social housing sector

Outline definitions

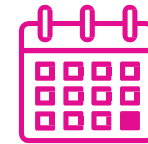
- Live cases – snapshot recorded in line with your organisation's policy and still in progress
- Average time to fix – days between a damp and mould case opening and closing as resolved
- Re-occurring cases – properties where any two or more cases of damp and mould have been opened during the benchmarked period

Median 2023/24 results



3%

OF SOCIAL HOMES HAVE A LIVE DAMP AND MOULD CASE



35 calendar days

25 working days

THE AVERAGE TIME TO FIX DAMP AND MOULD



1 in 5

DAMP AND MOULD CASES RE-OCCUR WITHIN A YEAR



What do you think?



Next Steps

- Have a think about what this means?
 - We've only scratched the surface of the ARC data today, have a think about what else you'd like to know
 - When comparing satisfaction, go behind the figures
 - Are the proposed changes to the ARC for 2025/26 right?
- CIH professionalism
 - Join 'Combatting Damp, Mould and Condensation: A Comprehensive Exploration' on October 24th
- Come and look beyond the ARC with Housemark

Membership mix



Trend and comparison analysis across the three key pillars > **financial, performance & governance**



In-year insights updated monthly > **across 15 major housing management metrics**



Tailored performance & costs reports > **delivered how you'd like and where you'd like**



On demand data requests > **ask us anything and let us fill the data gaps in your organisation**



Exclusive member-only content > **webinars, analysis, reports & events**



Scotland specials > **news, analysis, reports and events designed for the Scottish sector, delivered by our dedicated Scotland team**

Made with you in mind

Our membership package proposals are prepared based on what you value most.

At Housemark, we pride ourselves on delivering unrivalled insights that truly make a difference. We understand what matters to you most and what you're aiming to achieve so we can tailor a membership package that's just right.

To discuss what membership could mean for your organisation, please contact Siobahan Kilby, Head of Customer Success at Siobahan.Kilby@housemark.co.uk for an informal chat.

