

National Report on the Scottish Social Housing Charter

Headline Findings

2019/20



About our national reports

Each year we provide an analysis of the information reported to us by social landlords on their performance in achieving the standards and outcomes in the [Scottish Social Housing Charter](#). This report outlines our analysis of landlords' Annual Return on the Charter (ARC) for 2019/20. 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 also publish a [landlord report](#) for each social landlord.

We are publishing this year's report during the COVID-19 pandemic. This has presented unprecedented challenges for social landlords, their tenants, people who are homeless and other service users. While the pandemic continues to have a major impact on the environment that social landlords are operating in, it did not materially affect landlords' performance over the period covered by this report – 1 April 2019 to 31 March 2020.

In response to the impact of the pandemic, we moved the deadline for submitting the Annual Return on the Charter (ARC) to the end of July 2020 and the date for publication of this National Report and our landlord reports to the end of October. The pandemic has limited the volume of qualitative research we carried out this year with our National Panel, but it has still provided useful illustrative information which we include in this report.

Since April 2020 all social landlords have provided us with a monthly return that gives us key information on the impact of the pandemic. We publish this information in a [monthly dashboard and in open data format](#). We use the information to identify emerging issues and serious risks to tenants, people who are homeless and other service users. We provide the Scottish Government and the Social Housing Resilience Group with updates to help in their coordination of the national response to the pandemic.

This is the first National Report based on performance against the new indicators in place from 1 April 2019. We highlight in this report where indicators have changed. 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.

We also publish [performance data tables and performance data by Charter standard and outcome](#). These tables and data show:

- performance of social landlords over the last five years;
- performance in both RSL and local authority housing separately;
- the change in performance since last year; and
- performance by Charter standard and outcome.

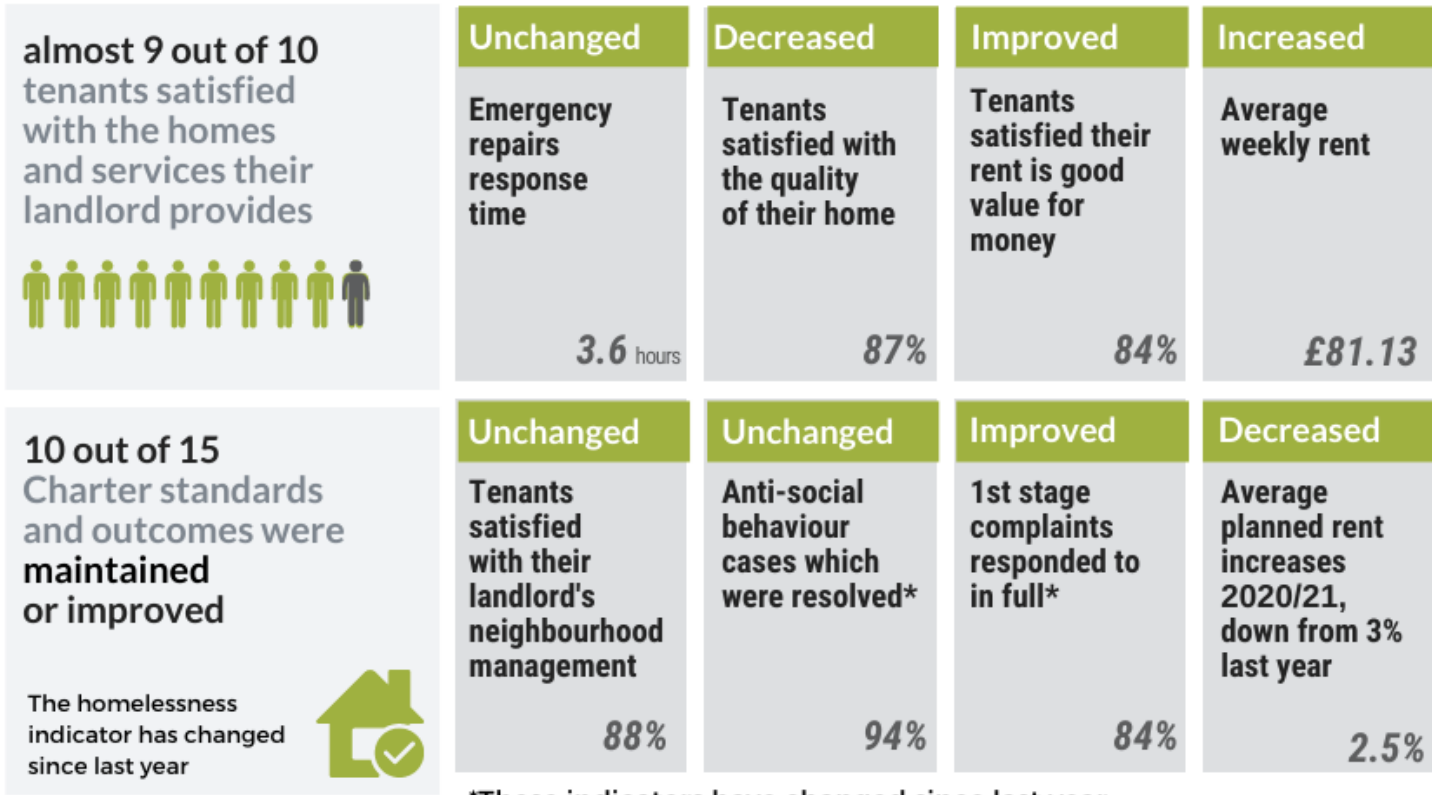
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Key results

The general picture shows:

Areas that matter most to tenants



*These indicators have changed since last year

Progress on the Charter

Scottish social landlords are performing well across most of the standards and outcomes of the Scottish Social Housing Charter


We reported improvement in performance across most Charter standards and outcomes in our National Reports from 2014/15 to 2018/19. Landlords have maintained that strong performance over the last two years. This year performance has been maintained or improved in 10 outcomes and declined in five.

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

The table opposite summarises the indicators which contribute to each outcome.

Charter outcomes	Progress
Equalities	Unchanged
Communication	Unchanged
Participation	Unchanged
Quality of housing	Declined
Repairs, maintenance & improvement	Improved
Estate management, anti-social behaviour, neighbour nuisance & tenancy disputes	Improved
Housing options & access to housing	Unchanged
Tenancy sustainment	Improved
Homeless people	This indicator has changed since last year
Value for money	Declined
Rents & service charges	Declined
Gypsy/Travellers	Declined

— Unchanged
 ↓ Declined
 ↑ Improved



**Areas that matter
most to tenants
& service users**

Homes & rents

Homes

In 2019/20 Scottish social landlords provided 605,637 homes to rent, up by 4,781 from the year before. The number of local authority homes increased by 1,328 while the number of RSL homes increased by 3,453.

Rents

The average weekly rent for Scottish social landlords was £81.40 in 2019/20, up 3% from £79.07 the previous year. Average local authority rents were £75.44, 14% lower than average RSL rents of £87.94.

Average tenant satisfaction with rent being good value for money has improved slightly from 83% to 84%. Satisfaction amongst RSL tenants increased very slightly to 84% while satisfaction amongst local authority tenants increased again in 2019/20 from 82% to 84%.

In our seventh National Panel report we explored people's experience of affordability issues and found that...

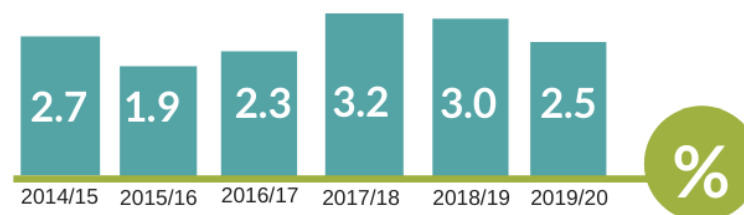
around half of respondents had experienced difficulties affording their rent, including around 1 in 8 who are currently experiencing difficulties. This represents a 14% increase from the 2019 survey. Tenants who don't receive help with their rent or who spend more than 25% of their income on rent are more likely to experience difficulties.

More than two thirds of those who mentioned difficulties cited heating costs as a factor and one third said it was the most important factor. Over three quarters of respondents expressed concerns about affording their rent over the next few years, an increase of just over 1 in 10 since the 2019 survey. The reasons for these concerns remained the same; future rent increases, benefit changes and changes to income, but concern over future rent increases rose from just over a third of respondents last year to almost a half.

Homes available to rent

605,637  **LAs** \wedge **1,328**
RSLs \wedge **3,453**

Average planned rent increases



Average satisfaction with rent being good value for money

improved to **84%**



LAs **84%** **RSLs** **84%**

Tenant satisfaction

Overall tenant satisfaction remains high

Tenant satisfaction with the homes and services provided by social landlords remains high, albeit marginally down on the previous year. For RSL tenants satisfaction with overall service increased slightly to 91% while for local authority tenants it dropped from 86% to 82%.

Overall tenant satisfaction

decreased

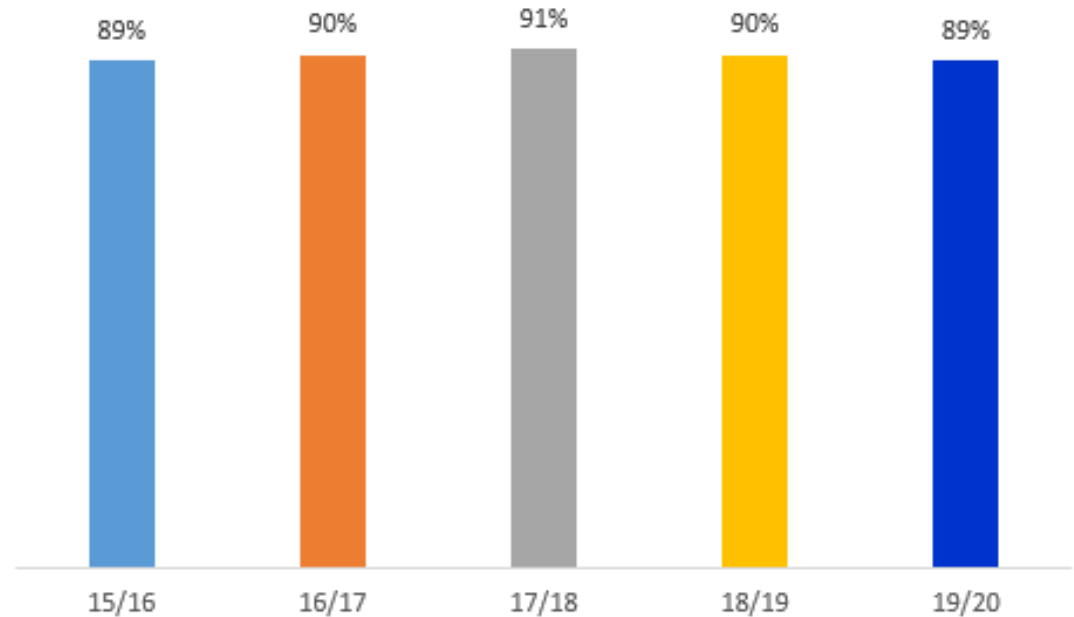
89%



LAs **82%**

RSLs **91%**

The percentage of tenants who said they were satisfied with the homes and services provided by their landlord from 2015 to 2020



Quality of homes

Existing tenants' satisfaction with the quality of their homes remains high

Average satisfaction with the quality of homes for RSL tenants remains high at 87% but dropped for local authority tenants from 85% to 81% for 2019/20.

Compliance with the Scottish Housing Quality Standard (SHQS) remains high at 94%.

Landlords have until December 2020 to meet the first milestone for the Energy Efficiency Standard in Social Housing (ESSH). Landlords have reported to us that 87% of homes in the scope of ESSH already meet this standard.

Landlords will provide their final report on performance against the first ESSH milestone in 2021. Their first report of performance against the next ESSH milestone will be in 2022.

You can get more information about ESSH on the Scottish Government's website [here](#).

Existing tenants' satisfaction with the quality of their homes

decreased to 87%



LA's **81%** RSLs **88%**

Percentage of homes that meet the Scottish Housing Quality Standard

remains at 94%



LA's **95%** RSLs **94%**

Percentage of homes compliant with ESSH

improved to 87%



LA's **84%** RSLs **91%**

Repairs and maintenance

Overall landlord performance on repairs and maintenance remains in a strong position

Most landlords respond quickly to emergency repairs and non-emergency repairs. In particular, local authorities and RSLs have continued to maintain their response times for emergency repairs.

After improving steadily since 2012/13, tenant satisfaction with repairs and maintenance reduced slightly this year to 91%. Satisfaction is higher amongst RSL tenants at 92% than for local authority tenants at 90%.

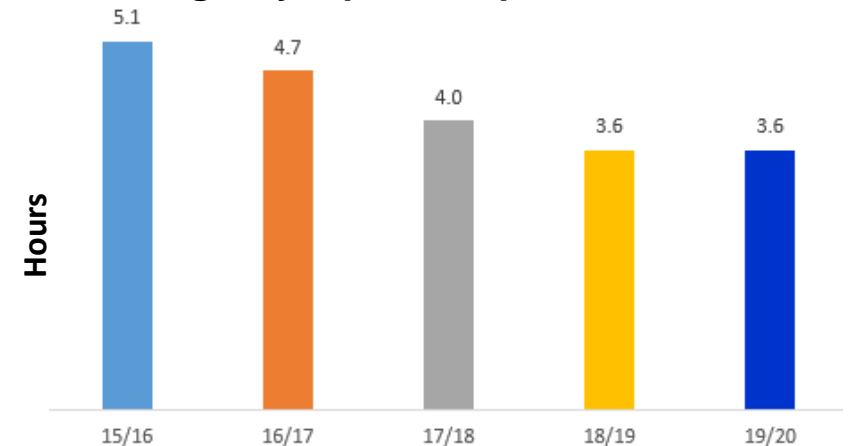
Performance on repairs completed right first time remains high but has reduced marginally to 92%.

Our thematic report on repairs services in Scotland found that...

the areas of repairs service most important to tenants and service users are:

- being treated with courtesy and respect;
- speed and efficiency of repairs;
- landlords having clear and consistent repairs policies;
- flexibility of the repairs service; and
- being kept informed.

Emergency repairs response time



Non-emergency repairs completed right first time

decreased to **92%**



LA 92% RSL 93%

Percentage of tenants satisfied with repairs service

decreased to **91%**



LA 90% RSL 92%

Tenant engagement

Landlords are generally good at engaging with their tenants

Average levels of tenant satisfaction with being kept informed by their landlord remain at 92%, having improved steadily since 2014/15. Average tenant satisfaction with opportunities to participate has remained steady at 87% for 2019/20. Satisfaction amongst RSL tenants increased to 89%, while local authority tenant satisfaction rose by 2% to 79%.

Tenants satisfied with opportunities to participate

remains at

87%



LA 79% RSL 89%

Tenants satisfied with being kept informed

remains at

92%



LA 86% RSL 93%

In our seventh National Panel report we explored members' experience of engaging with their landlords. We found that...

respondents were most likely to feel that their landlord's staff have the skills and knowledge they need, and that their landlord provides information that meets their needs. Respondents were less likely to indicate that their landlord makes them feel valued.



Other services

Homelessness

People who are homeless are spending longer in temporary accommodation waiting for a home.

Homelessness [statistics](#) published by the Scottish Government for 2019/20 show...

- the number of homeless applications has increased slightly in 2019/20 from 36,771 to 36,885. 31,333 households were assessed as homeless, an increase of 4% (1,097) from 2018/19;
- there were 4,595 cases of households not being offered temporary accommodation when they should have been, 3,835 of these were in Glasgow;
- there were 500 breaches of the unsuitable accommodation order (UAO), 375 of these were in Edinburgh. The number of breaches reduced from 645 in 2018/19, a drop of 22% (145). You can find more about the UAO [here](#);
- there were 11,655 households in temporary accommodation on 31 March 2020, an increase of 676 (6%) on the previous year. Households spent an average of 184 days in temporary accommodation, an increase of 2 days from 2018/19. This has increased for the third consecutive year from 176 days in 2017/18;
- 76% of households assessed as homeless secured a tenancy with a social landlord. Local authorities contributed 46% of tenancies and RSLs contributed 30%. ARC returns show that tenancy sustainment for households who were previously homeless has decreased to 88%.

Average length of stay in temporary accommodation

increased



184
days

The number of households offered a secure tenancy after presenting as homeless

76%



In our seventh National Panel report we explored people's experiences of the homelessness system and although the Covid-19 pandemic meant fewer interviews were conducted we found that...

- access to alternative accommodation had a significant bearing on how people experienced services – for some who needed emergency accommodation, feedback was focused exclusively on whether services had found suitable accommodation;
- some participants highlighted their emotional needs at the time of accessing services, in addition to their requirement for accommodation. This appeared to be a particular concern for those without previous experience of homelessness services;
- participants generally felt that the temporary accommodation provided met their needs, although some needed multiple moves to find a suitable option;
- the transition to settled accommodation was a key stage in terms of them subsequently sustaining a tenancy. Participants referred to this as a significant relief and a clearly positive step, but also one which brought practical and emotional challenges; and
- the importance of support from service staff and informal support networks was highlighted in relation to participants' initial engagement with services, their time in temporary accommodation, and sustaining their own tenancy. Some felt that more emotional support was required as they settled into their accommodation.

Gypsy/Travellers

Satisfaction amongst Gypsy/Travellers continues to be well behind those for other services provided by social landlords

All of the outcomes in the Charter apply to Gypsy/Travellers who use the 28 sites provided by 18 local authorities and one RSL. Average satisfaction with landlords' management of sites has decreased from 79% in 2018/19 to 73% in 2019/20. The average weekly pitch rent has increased from £66.02 in 2015 to £72.14 in 2019. The average for LA sites is £73.25 and for the two RSL sites is £52.02.

During 2019/20 we continued to engage with landlords that provide Gypsy/Traveller sites about their compliance with the minimum site standards set out by Scottish Government which you can find more about [here](#) and about their obligations in relation to fire safety. This included monitoring, assessing and reporting on site providers' performance in delivering the Scottish Social Housing Charter.

Of the 28 sites, 16 currently comply with Scottish Government's minimum standards and with fire safety requirements; eight comply with the minimum standards but have yet to meet fire safety requirements; three sites comply with fire safety requirements but have yet to meet minimum standards and one site, provided by Aberdeen City Council, does not comply with either the minimum standards or fire safety requirements.

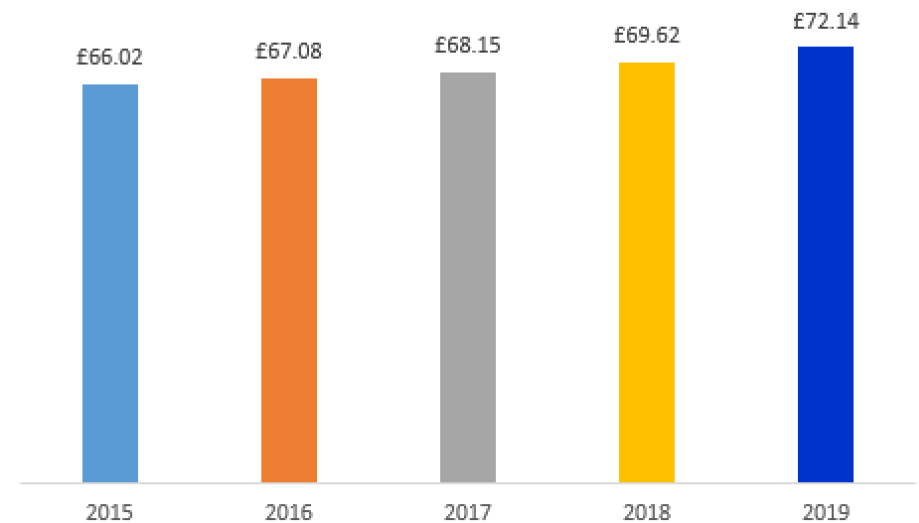
Average satisfaction with landlords' management of sites

decreased to

73%



Increase in pitch rents



Gypsy/Travellers

In our seventh National Panel report we explored members' experience of Gypsy/Traveller site standards. The Covid-19 pandemic meant that fewer interviews took place but we found that participants....

- commented very positively on landlords' management of improvements to bring sites up to standard;
- were positive about their opportunities to inform improvements, about landlords giving advance notification and about landlords following up to ensure the quality of works;
- said improvements had a positive impact on the appearance of sites and on their quality of life. These improvements most commonly related to the refurbishment of amenity blocks and the installation of fences to pitches. Some participants felt that site improvements could have had a greater impact for tenants, particularly where improvements were perceived to have benefited some more than others, and where there were outstanding safety concerns.

Factored owners

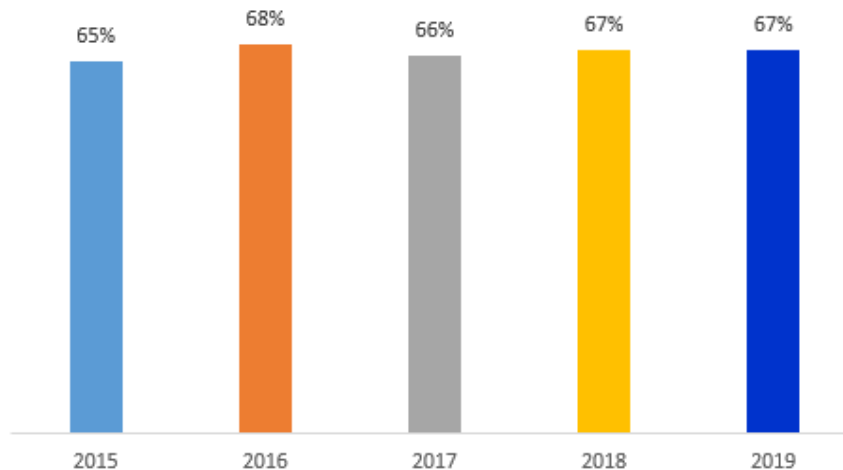
Satisfaction amongst factored owners continues to be well behind those for other services provided by social landlords

121,011 home owners receive factoring services from 141 social landlords across 32 local authority areas.

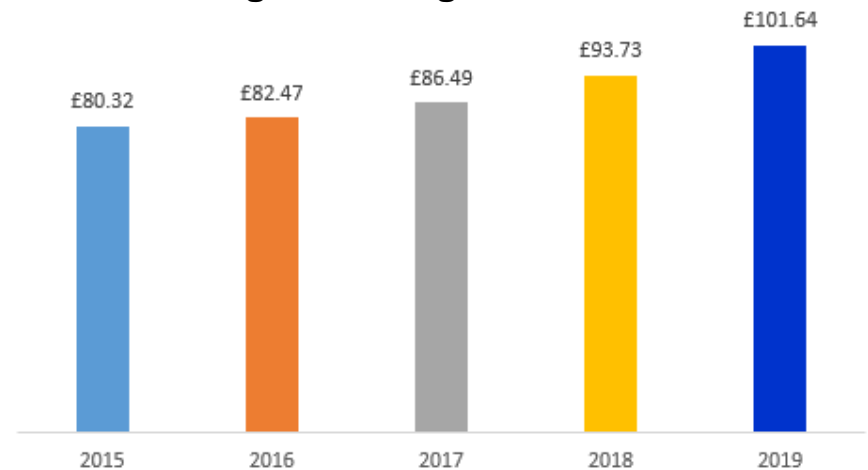
The average factoring fee has increased from £93.73 in 2018/19 to £101.64 in 2019/20. On average factoring fees charged by RSLs are significantly higher than those charged by local authorities.

The average fee for RSL factored owners rose by almost 8% from £108.04 in 2018/19 to £116.31 in 2019/20 while LA factored owners' fees rose by just over 8% from £49.78 to £53.84.

Average satisfaction with factoring service



Average factoring fees



Average satisfaction with factoring fee remains at

67%



LA 56% RSL 68%

Want to know more?

You can see the landlord reports, comparison tool and data tables on our website www.housingregulator.gov.scot. For more analysis, a full dataset of all landlords' performance information is also available.





**Scottish Housing
Regulator**

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