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National reports on the Scottish Social Housing Charter

National Report on the Scottish Social Housing Charter - Headline Findings - 2021 -2022

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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 2021/22.

We publish performance data tables and performance data by Charter standard and outcome. We also publish a landlord report for each social landlord.

From April 2021 to March 2022, all social landlords provided us with a quarterly return that gave us key information on the impact of the COVID-19 pandemic on their operations. We collected this information to support the Scottish Government and the Social Housing Resilience Group (SHRG) in their coordination of the national response to the pandemic. We published it in a [quarterly dashboard](#) and in open data format. In agreement with the SHRG we stopped the collection of this data after the return for information to the end of March 2022.

Earlier this month we published the report on the [National Panel of Tenants and Service Users 2021 to 2022](#) which includes insights on how panel members felt the pandemic affected their financial circumstances and their landlord's services.

The impact of the pandemic

In recognition of the challenging context which 2020/21 created for social landlords, we changed the focus of last year's [National Report](#). We acknowledged that social landlords' services were significantly impacted by the pandemic, and we anticipated that this would continue to be felt during 2021/22.

During 2021/22, landlords were able to start building back the range of services they provide to tenants and other service users. However, the scale of the recovery work required has been significant as social landlords recover out of the pandemic. This, plus the continuing, albeit gradual easing of, COVID related restrictions and emergence of the Omicron variant were important contextual factors in assessing performance in the last year.

The availability and increased cost of labour and materials in the construction industry has also created challenges for social landlords, particularly against the backdrop of the pandemic where backlogs of reactive and planned maintenance had built up. This also affected social landlords' ability to progress with their development programmes to build new homes; many of which were paused during the national lockdowns to minimise the spread of COVID-19.

Key results

The general picture shows:

- **Almost 9 out of 10 tenants are satisfied with the homes and services their landlord provides.**

Areas that matter most to tenants

- Emergency repairs response time remains at 4.2 hours
- Tenants satisfied with the quality of their homes decreased slightly to 85%
- Tenants satisfied that their rent is good value for money remains at 83%
- Average weekly rent increased to £85.36
- Tenants satisfied with their landlord's contribution to neighbourhood management decreased slightly to 85%
- Anti-social behaviour cases which were resolved increased slightly to 95%
- First stage complaints responded to in full remains at 97%
- Average planned rent increases for 2022/23 went up to 3%

Areas that matter most to tenants

Homes

- **Homes available to rent increased to 617,460 - Local Authorities (LAs) up by 2,759, Registered Social Landlords (RSLs) up by 3,124**

In 2021/22 Scottish social landlords provided 617,460 homes to rent, up 1% (5,883) from the year before. The number of LA homes increased by 2,759, while the number of RSL homes increased by 3,124.

Rent

- **Average satisfaction with rent being good value for money remains at 83% - LAs 81%, RSLs 83%**
- **Average weekly rent has increased by 1.8% to £85.36**

Average tenant satisfaction with rent being good value for money remained at 83%, although the average for LAs has decreased slightly to 81%.

The average weekly rent was £85.36, up 1.8% on the previous year. Average LA rents were £79.70, 13% lower than average RSL rents of £91.51.

Average planned rent increase

Year	Percentage
2018/19	3.2%
2019/20	3.0%
2020/21	2.5%
2021/22	1.2%
2022/23	3.0%

The average planned rent increase for 2022/23 is 3%, up from 1.2% in the previous year. Planned rent increases for 2022/23 range from 0% to 6%.

The current economic context has clearly influenced landlords' decisions on rent increases. As well as the impact of the pandemic, landlords will have been mindful of predicted cost of living increases - most notably significant and cumulative rises in domestic energy costs - throughout 2022 and beyond. This context heightens the importance of landlords undertaking comprehensive and regular reviews of

their business plans to ensure they understand and factor in the impact of the current unprecedented economic climate.

Tenant satisfaction

Landlords should carry out a tenant satisfaction at least every three years. We recognised that the impact of the pandemic might affect landlords' ability to undertake face to face surveys, and we advised landlords to tell us about any delay in their survey in the ARC.

Just under half of landlords carried out a survey during 2021/22. This means that almost all social landlords have completed a survey within the last three years. The pandemic has clearly affected the methodology used, with far fewer surveys being carried out face to face.

- **Overall tenant satisfaction is marginally down at 88% - LAs 82%, RSLs 89%**

Overall tenant satisfaction remains high, however there were small decreases for both LAs and RSLs from the previous year.

Quality of homes

- **Existing tenants' satisfaction with the quality of their homes decreased to 85% from 87% - LAs 81%, RSLs 86%**
- **Percentage of homes that meet the Scottish Housing Quality Standard decreased to 75% from 87% - LAs 70%, RSLs 80%**

- **Percentage of homes compliant with ESSH decreased to 88% from 89% in the previous year - LAs 83%, RSLs 93%**

This year, fewer homes meet SHQS. Some landlords reported delays in carrying out electrical safety inspections, installation of interlinked smoke and heat detectors and upgrades to improve energy efficiency; all of which now form part of the SHQS. Landlords told us that they had experienced difficulties both gaining access to tenants' homes, because of the pandemic, and securing materials to complete the work. Many of the landlords who reported an increased level of SHQS failures confirmed that they have plans in place to address these issues during this reporting year. This is reflected in landlords' projections of 90% compliance with SHQS next year. Earlier this month we updated our [Annual Assurance Statement FAQs](#) to advise landlords that if they have not carried out all electrical safety inspections (EICRs) at the point of submitting their Annual Assurance Statement, they should identify this in the Annual Assurance Statement.

Repairs and maintenance

The pandemic had an immediate and significant impact on social landlords' ability to undertake both reactive repairs and planned maintenance on tenants' homes. This was reflected in the 2020/21 performance in last year's National Report. During 2021/22, the gradual reduction in restrictions meant that social landlords could begin to address backlogs.

- **Non-emergency repairs completed right first time decreased to 88% from 92% - LAs 89%, RSLs 88%**

- **Percentage of tenants satisfied with their repairs service decreased to 88% from 90% - LAs 87%, RSLs 88%**
- **Average days to complete non-emergency repairs increased to 8.9 working days from 6.7 working days - LAs 9.2 days, RSLs 8.6 days**

Tenant satisfaction with repairs and maintenance reduced to 88%, with small reductions among both RSL and LA tenants.

Emergency repairs completion times remained stable at 4.2 hours, and there was an increase in the time taken to complete non-emergency repairs. Landlords have told us that the pandemic has had a significant impact on their performance. This includes addressing the backlog of repairs which may have been on hold during 2020/21 due to the restrictions in place. Landlords undertook 22% more repairs during 2021/22 (1,896,347 in total) compared to the previous year (1,559,650 in total).

Emergency repairs response time

Year	Hours
2017/18	4.0
2018/19	3.6
2019/20	3.6

2020/21	4.2
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2021/22	4.2
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Tenant engagement

- **Tenants satisfied with opportunities to participate remains at 87% - LAs 79%, RSLs 88%**
- **Tenants satisfied with being kept informed decreased to 91% from 92% - LAs 85%, RSL 92%**

Average tenant satisfaction with opportunities to participate has remained steady at 87% for 2021/22. Satisfaction amongst RSL and LA tenants is also unchanged, at 88% and 80% respectively.

The average satisfaction with being kept informed decreased marginally at an aggregate level, and for both RSL and LA tenants.

Other services

Homelessness

- **Instances of households not being offered temporary accommodation rose by 17%**
- **Average length of stay in temporary accommodation increased slightly to 207 days**
- **There were 2,015 breaches of the Unsuitable Accommodation Order**
- **The number of lets to people assessed as homeless increased by 8%**

Throughout 2021/22, the pandemic continued to affect local authorities' homelessness service provision. The Scottish Government's publication on homelessness statistics for 2021/22 highlights the contextual factors which have affected performance, including:

- legislation and policies which reduced the number of people being evicted;
- restrictions on the ability of landlords to move people in to permanent homes;
- high levels of backlogs as there are more households in temporary accommodation and for longer periods of time; and
- shortage of tradespeople and building materials, and the increased costs of these.

The Scottish Government's statistics show:

- the number of homeless applications in 2021/22 increased by 3% (994) from the previous year to 35,230;
- 28,882 households were assessed as homeless, an increase of 3% (840) from 2020/21;
- there was an increase in the number of open homeless applications – applications that are not yet completed – at 31 March 2022 of 5% (1,332) to 26,166;
- there were 690 cases of households not being offered temporary accommodation when they should have been, up 17% from 595 in the previous year;
- there were 2,015 breaches of the Unsuitable Accommodation Order (UAO), up from 510 in the previous year. It is worth noting that the UAO was extended to all households (it previously only applied to households with children or pregnant women) during the reporting year. You can find more about the UAO [here](#);
- there were 13,945 households in temporary accommodation on 31 March 2022, an increase of 4% (586) on the previous year. Households spent an average of 207 days in temporary accommodation, an increase of 3 days from 2020/21; and
- 78% of households assessed as unintentionally homeless secured a tenancy with a social landlord, up from 74% in 2020/21 – 45% by LAs (up from 42%) and 33% from RSLs (up from 32%).

ARC data shows that:

- tenancy sustainment for households who were previously homeless has remained at 90%;
- overall, social landlords let 20,683 homes to people who LAs had assessed as homeless, up by 11% (2,104) on the previous year, although that is in the context of an increase in all lets of 25%;

- social landlords let 39% of all lets to people assessed as homeless, down from 44% in 2020/21;
- LAs let 11,387 homes to people who they assessed as homeless, up by 15% on the previous year;
- LAs decreased the proportion of lets to people assessed as homeless to 46% of all lets, down from 50% in 2020/21;
- RSLs let 9,296 homes to people assessed as homeless and referred by LAs, up by 7% (618) on the previous year; and
- RSLs let 33% of their total lets to people assessed as homeless, down from 38% in 2020/21.

Gypsy/Travellers

- **Average satisfaction with landlords' management of sites provided for Gypsy/Travellers decreased to 71% from 76%**

Satisfaction amongst Gypsy/Travellers fell from 76% in 2020/21 to 71% in 2021/22. This continues to be well behind the satisfaction levels for other services provided by social landlords.

The average weekly pitch rent for gypsy/traveller sites owned by social landlords increased by 2.9% to £75.97 in 2021/22, with a range of £50 to £93.82.

Year

Weekly rent

2017/18	£68.15
2018/19	£69.62
2019/20	£72.14
2020/21	£73.86
2021/22	£75.97

We continue to engage with landlords that provide Gypsy/Traveller sites about their compliance with the [minimum site standards](#) set out by the Scottish Government, and about their obligations in relation to fire safety. Of the 28 sites, 20 comply with Scottish Government's minimum standards and with fire safety requirements; six comply with the minimum standards but have yet to meet fire safety requirements; one site complies with fire safety requirements but has yet to meet minimum standards and one site does not comply with either the minimum standards or fire safety requirements.

Factored owners

- **Average satisfaction with factoring remains at 65%, - LAs 51%, RSLs 67%**

Satisfaction amongst factored owners remains unchanged and continues to be well behind those for other services provided by social landlords. For LAs, satisfaction has decreased from 55% to 51%. In comparison, satisfaction amongst RSLs' factored owners increased marginally to 67%.

The average management fee for factored owners has increased by 1.5% to £104.67 in 2021/22. However, the average fee charged by LAs has decreased to £55.70. This is less than half of the average fee charged by RSLs at £121.68.

Year	Management fee
2017/18	£86.79
2018/19	£93.73
2019/20	£101.64
2020/21	£103.12

2021/22

£104.67

Scale of recovery

The following section provides information on the ongoing impact of the COVID-19 pandemic during 2021/22 on some important aspects of landlords' performance which were particularly affected by the COVID-19 restrictions. Comparisons to previous years' data helps to illustrate the scale of recovery work for landlords.

Empty homes

More homes became empty during 2021/22 than the previous year, although there were still fewer than became empty during 2019/20.

	2019/20	2020/21	2021/22
Number of empty homes	50,200	41,805	47,214
% of homes that became empty	8.4%	6.9%	7.8%
Average days empty	31.5	56	52
Rent lost through empty homes	£23,369,046	£35,794,607	£38,234,561

Homes were, on average, empty for 52 days. This is shorter than the previous year, but still significantly longer than in 2019/20. As a result, landlords lost more than £38.2 million in rent from homes which were empty.

Lettings

The first national lockdown all but suspended the letting of homes, which had a significant impact on landlord performance during 2020/21. As the COVID-related restrictions eased during 2021/22, many landlords started to resume a full lettings service again.

In 2021/22 landlords let a total of 52,895 homes, up 25% (10,508) on the previous year, but still below the 55,320 in 2019/20. In 2021/22, LAs let 24,623 homes and RSLs let 28,272 homes.

Arrears

The support and advice provided to tenants by social landlords and government initiatives to support households financially helped to mitigate potential increases in rent arrears because of the impact of the pandemic . This continued during 2021/22, with the launch of the Scottish Government's Tenant Grant Fund aimed at assisting those who had incurred rent arrears as a result of the pandemic. This coincided with the easing of COVID restrictions and wind down of the UK Government's Job Retention Scheme.

At 31 March 2022 social landlords had total arrears of rent of £169,626,857. This is 6.3% of total rent due; an increase from 6.1% in the previous year, and the highest level of arrears reported in the ARC since the introduction of the Charter. The total arrears for RSLs reduced to 4.2% from 4.3% in 2020/21, while the total for LAs rose to 8.7% from 8.2%.

	2019/20	2020/21	2021/22
Gross rent arrears - combined	£146,831,890	£160,540,302	£169,626,857

As % of rent due

5.8%

6.1%

6.3%

The number of households for which landlords are paid housing costs directly (through Universal Credit or Housing Benefit) increased by just over 3% to 392,641 in 2021/22, while the value of those payments increased by 6%.

Gas safety

During 2021/22 landlords did not meet the requirement to carry out an annual gas safety check on gas appliances in their homes on 3,028 occasions; 1,012 for RSLs and 2,016 for LAs. This compared to 17,446 occasions in 2020/21, and 496 in 2019/20.

We completed a review of the missed gas safety checks in the summer and established that they have all now been completed.

Landlords told us that the vast majority of the missed or late checks were a consequence of the COVID-19 pandemic, including tenants refusing to give access to their homes because they were shielding or self-isolating.

Adaptations

The average time to complete adaptations decreased to 54 days from 58 days in 2020/21, although this is a 31% increase on 2019/20 of 42 days. The average time to complete adaptations for RSLs in 2021/22 was 71 days, and 46 days for LAs.

On 31 March 2022 there were 5,090 households waiting for adaptations; 2,018 for RSLs and 3,072 for LAs.

Want to know more?

You can see the landlord reports, comparison tool and data tables on the [landlord directory](#) on our website. For more analysis, a [full dataset](#) of all landlords' performance information is also available.

Part 2

The impact of the pandemic

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