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National reports on the Scottish Social Housing Charter

National Report on the Scottish Social Housing Charter - Headline Findings - 2023-2024

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About our National Reports

Each year we report on the information submitted to us by social landlords on their performance in achieving the standards and outcomes in the [Scottish Social Housing](#)

[Charter](#). Social landlords are registered social landlords (RSLs) and local authorities (LAs). This report is our analysis of landlords' Annual Return on the Charter (ARC) for 2023/24.

We publish all of the [statistical information](#) provided by landlords in their ARC, as well as performance data by Charter standard and outcome. We also publish a landlord report for each landlord on our [landlord directory](#).

Our National Report and suite of performance data should be used by social landlords to report their own performance to their tenants and other service users. When doing this, landlords must include relevant comparisons (including to previous years, with other landlords and national performance) and give tenants and other service users a way to feed back their views on the style and form of the reporting. More detail on these requirements can be found in [section 3 of our Regulatory Framework](#).

Context

It is important to consider the wider global and economic context when assessing social landlords' performance. 2023/24 was a challenging year for those who rely on social housing and for those who provide it.

During 2023/24 the cost-of-living crisis continued to put pressure on household budgets. Our most recent [National Panel of Tenants and Service Users report](#) found that around one in five Panel members were not managing well financially at the time of the survey. Increased food and energy costs were the biggest contributors to this. Social landlords, meanwhile, continued to be impacted by high inflation, higher interest rates and the tightening of public finances.

We published a [thematic review of homelessness services in Scotland](#) in February 2023, and an [update](#) to this in December 2023. Drawing on our engagement with every local authority about their homelessness service, homelessness statistics published by the Scottish Government and information from a range of external stakeholders, we concluded that the demands on some LAs around homelessness now exceed their capacity to respond. As a result, we are of the view that there is systemic failure in the services provided to people who are homeless by some LAs and heightened risk of systemic failure in others.

In May 2024 the Scottish Parliament declared a national housing emergency. The declaration is significant and sits alongside the declaration of local emergencies in multiple LA areas.

Headline findings

The general picture shows:

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

Areas that matter most to tenants

- Emergency repairs response time improved slightly to 4 hours
- Tenants satisfied with the quality of their homes remained at 84%
- Tenants satisfied that their rent is good value for money remained at 82%
- Average weekly rent in 2023/24 increased to £91.81
- Tenants satisfied with their landlord's contribution to neighbourhood management increased to 85%
- Anti-social behaviour cases which were resolved remained at 94%
- First stage complaints responded to in full remained high, increasing slightly to 97%
- Average rent increase applied in 2024/25 was 6%

Progress against the Charter

Social landlords continue to perform well across most of the standards and outcomes of the Scottish Social Housing Charter. They maintained performance during 2023/24 for

most of the Charter outcomes.

Charter outcome	Progress
Equalities	Improved
Communication	Improved
Participation	Improved
Quality of housing	Unchanged
Repairs, maintenance and improvements	Unchanged
Estate management, anti-social behaviour, neighbour nuisance and tenancy disputes	Unchanged
Housing options	Improved
Access to social housing	Improved
Tenancy sustainment	Unchanged
Homeless people	Declined
Value for money	Unchanged

Rents and service charges

Unchanged

Gypsy/travellers

Declined

More detail on the indicators which contribute to each outcome and standard, and how performance has changed over time, is available in the Charter Indicators and Data by Outcomes and Standards publication which is available [on our website](#).

Analysis

Homes

- **Homes available to rent increased to 630,732 - LAs up by 2,398, RSLs up by 4,366**
- **Average days to re-let homes increased to 57 days - LAs increasing to 73 days, RSLs decreasing to 39 days**
- **The number of homes let by social landlords increased to 51,342 - LAs increasing to 25,462, RSLs decreasing to 25,880**

The national housing emergency declared by the Scottish Parliament in May 2024 has further intensified the focus on the supply of new homes and the best use of existing homes. To this end, in July 2024 we published an [early analysis](#) of the ARC data for 2023/24 that social landlords submitted on empty homes and lettings, as well as data submitted by RSLs on their plans to build new homes.

In 2023/24 Scottish social landlords provided 630,732 homes to rent, up 1% from the year before. The number of LA homes increased by 2,398, while the number of RSL homes increased by 4,366.

For the five years to the end of March 2020 the number of homes that became empty was consistently around 50,000 each year. In 2020/21, the year the pandemic first impacted, the number of homes becoming empty dropped by 17% to just under 42,000, before rising to just over 47,000 in 2021/22. However, the number of homes becoming empty dropped in each of the next two years. The reductions in turnover may indicate positive outcomes from the work social landlords do to prevent homelessness and sustain tenancies, that more tenants are happy with their home or that tenants are less keen to move in a time of such economic challenges. Whatever the underlying cause, lower turnover means that social landlords have significantly fewer homes available to let to people in need, including those who are experiencing homelessness, than they had ten years ago.

Homes were, on average, empty for 57 days in 2023/24, marginally up on the previous year and significantly up on 32 days in 2019/20. The time taken by local authorities to re-let empty homes increased to 73 days in 2023/24 from 67 in 2022/23. RSLs reduced the time taken to re-let empty homes to 39 days in 2023/24; this is down from 44 days in 2022/23, but not yet back to the low of 26 days in 2019/20. Social landlords lost £40.9m in 2023/24 rent from homes being empty in 2023/24, marginally up on the year before.

	2019/20	2020/21	2021/22	2022/23	2023/24
Homes that became empty during the year	50,200	41,806	47,213	45,551	44,501
% of homes that became empty during the year	8.4%	6.9%	7.8%	7.4%	7.2%
Average days empty	32	56	52	56	57
Total lets made	55,320	42,387	52,894	50,996	51,342

Social landlords have told us about a range of challenges they are experiencing that are negatively impacting on how quickly they can bring empty homes back in to use. These include availability of labour and materials, contractor difficulties and problems with getting utility companies to move quickly on installing or updating gas and electricity meters. Landlords have also told us about a growing problem of homes being left in a poor condition by departing tenants, and so requiring more work to bring them back to a lettable standard; many landlords attribute this emerging problem to increasing levels of vulnerability amongst tenants.

For the five years to the end of March 2020 the number of homes let by social landlords ranged from around 53,000 to just over 56,000. The number of lets dropped significantly in 2020/21 as pandemic-related restrictions took effect. Since then, the number of lets has ranged from just under 51,000 to just under 53,000. In 2023/24, social landlords let 51,342 homes, up less than 1% (346) on the previous year, and down nearly 7% on 2019/20. Between 2022/23 and 2023/24, LA lets increased to 25,462 homes and RSL lets decreased to 25,880 homes.

Rent

- **Average satisfaction of tenants with rent being good value for money remained at 82% - LAs 80%, RSLs 82%**
- **Average weekly rent in 2023/24 increased by 4.8% to £91.81**
- **Gross rent arrears decreased to 6.7% - LAs 9.5%, RSLs 4.4%**

Average tenant satisfaction with rent being good value for money remained at 82% for all landlords, and for RSLs. There was a small decrease among LA tenants to 80%.

The average weekly rent in 2023/24 was £91.81, up 4.8% on the previous year. Average LA rents were £84.31; 18% lower than average RSL rents of £99.71.

At 31 March 2024 social landlords had total arrears of rent of £197,601,356. This is 6.7% of the total rent due. This is the second highest level of arrears reported in the ARC since the introduction of the Charter, after the highest level of 6.9% in 2022/23. The total rent arrears for both RSLs and LAs decreased by 0.1 percentage points, but the level for RSLs continues to be half that of LAs. RSL arrears fell to 4.4% and LA arrears fell to 9.5%.

In relation to rent arrears, some landlords told us that their tenants continue to be impacted by the cost-of-living crisis, and that there has been an increased focus on

providing or signposting households to services to maximise their income.

The number of households for which landlords are paid housing costs directly (through Universal Credit or Housing Benefit) increased by 2% to 401,289 in 2023/24, while the value of those payments increased by 6.6% to £1.515bn. This is the highest value of direct housing costs payments since the introduction of the Charter.

Tenant satisfaction

- **Overall tenant satisfaction remained at 87% - LAs 80%, RSLs 88%**

Tenant satisfaction remained high at 87% in 2023/24. For RSLs, there was a slight increase to 88% from 87% in 2022/23; and a decrease among LA tenants from 83% to 80%. Many landlords told us that they will use the feedback from tenants to sustain and drive improvements in their service.

Landlords should carry out a satisfaction survey with tenants and service users at least every three years. Just under half of landlords carried out their latest survey during 2023/24, and most surveys were carried out either face to face or via telephone.

Quality of homes

- **Tenants' satisfaction with the quality of their homes remained at 84% - LAs 79%, RSLs 85%**
- **Percentage of homes that meet the Scottish Housing Quality Standard (SHQS) increased to 84% from 79% - LAs 78%, RSLs 91%**

Although tenant satisfaction with the quality of their homes across all landlords is unchanged at 84%, it has reduced among LA tenants from 82% in 2022/23 to 79% in 2023/24. This is lower than for RSL tenants (85%).

The number of homes that meet SHQS increased for the second consecutive year, with fewer homes failing, exempt or in abeyance from SHQS. More of RSLs' homes meet SHQS than LAs' (91% compared to 78%, respectively).

	2020/21	2021/22	2022/23	2023/24
Homes meeting SHQS	529,862	449,286	491,653	530,378
% meeting SHQS	87%	73%	79%	84%
% failing SHQS - one criterion	6.6%	12.6%	11.5%	8.4%
% failing SHQS - two or more criteria	0.4%	4.7%	3.8%	2.5%
% exempt from SHQS	3.2%	2.6%	2.3%	1.9%
% in abeyance from SHQS	2.9%	7.4%	3.5%	2.7%

At 31 March 2024, 10.9% of social landlords' homes failed SHQS, with most (8.4%) failing in just one criterion. The number of homes in abeyance from SHQS, which means work cannot be completed for 'social' reasons relating to tenants' or owner-occupiers' behaviour, continued to reduce. Homes exempt from SHQS - which can be because of technical, disproportionate cost or legal reasons - has reduced slightly. SHQS criteria and the classifications used are set by the Scottish Government, and more detail can be found in the Scottish Government's [SHQS technical guidance](#).

Despite the second consecutive increase, the number and proportion of homes that meet SHQS in 2023/24 is still lower than in 2020/21. As described in previous National Reports, the reduction in homes meeting SHQS since 2020/21 has largely been because of failures to meet the requirement to install interlinked smoke and heat detectors and to complete electrical safety inspections; compliance with these was due in February and March 2022, respectively.

This has meant there has been a backlog of outstanding inspections and installations which some landlords are continuing to address, and we are engaging with these landlords about this. From the comments submitted by landlords, by the end of 2023/24, there were more homes failing because of outstanding electrical safety inspections rather than smoke and

heat detector installations. Landlords again told us about difficulties gaining access to some tenants' homes to meet these requirements.

The electrical safety element of SHQS requires landlords to ensure that the electrical system in all tenants' homes is safe. To do this, landlords must arrange an Electrical Installation Condition Report (EICR) at least every five years, and complete any urgent work identified from this. Although many landlords now have up to date EICRs in all of their tenants' homes, some landlords have told us that some EICRs were carried out more than five years after the last one. It is essential that landlords have effective and robust policies, procedures and systems in place to ensure that they meet their tenant and resident safety duties - including electrical safety - on time.

Landlords have projected that their SHQS compliance at the end of 2024/25 will be 90%. This was also what landlords had projected the compliance rate would be for the last two consecutive years but did not achieve.

Repairs and maintenance

- **Percentage of tenants satisfied with their landlord's repairs service has decreased slightly to 87% - LAs 87%, RSLs 87%**
- **Average hours to complete emergency repairs has decreased to 4 hours - LAs 4.3 hours, RSLs 3.6 hours**
- **Average days to complete non-emergency repairs increased to 9 working days from 8.7 working days - LAs 10 days, RSLs 8.1 days**
- **Reactive repairs completed right first time remained at 88% - LAs 89%, RSLs 88%**

Tenant satisfaction with repairs and maintenance fell slightly to 87% in 2023/24. Whilst the average emergency repairs completion time fell slightly to 4 hours, the average time taken to complete non-emergency repairs increased slightly to 9 days.

As described in section 5, landlords have told us about challenges with contractor capacity and the availability and cost of materials which were affecting the delivery of their repairs services and impacted adversely on satisfaction levels amongst tenants.

Gas safety

During 2023/24, social landlords met their requirements on gas safety for 99.6% of their homes. This means that landlords did not carry out an annual gas safety check on gas appliances when required on 2,633 occasions. More than 2,200 of these were for one local authority landlord, which told us that the majority of the missed checks were because of an error in the system used to generate appointments with tenants. The total number of checks that were not carried out when required in 2023/24 is more than double that of 2022/23 (1,032). Although there are more occasions, it is across fewer landlords; 45 landlords had at least one instance of not carrying out a gas safety check when required during 2023/24, compared to 68 during 2022/23.

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

Other reasons for missed or late checks were due to data systems issues, administrative errors, landlords being unable to access the property, and issues with contractor availability or performance.

As highlighted earlier, it is essential that landlords have robust systems and processes in place to ensure they comply with tenant and resident safety duties, including gas safety, at all times.

Adaptations

The average time to complete adaptations decreased to 45 days from 47 days in 2022/23. RSLs maintained the average of 47 days, whilst there was a reduction for LAs to 43 days.

On 31 March 2024 there were 4,206 households waiting for adaptations; 1,901 for RSLs and 2,305 for LAs. This is down from 5,065 households in 2022/23.

Tenant engagement

- **Tenants satisfied with opportunities to participate increased to 88% - LAs 80%, RSLs 89%**
- **Tenants satisfied with being kept informed increased slightly to 91% - LAs 82%, RSLs 92%**

Tenant satisfaction with opportunities to participate (88%) and with being kept informed (91%) have both increased between 2022/23 and 2023/24. Satisfaction among RSL tenants continues to be higher than among LA tenants for both indicators.

Other services

Homelessness

- **Households were not offered temporary accommodation when they should have been on 7,915 occasions**
- **There were 7,400 breaches of the Unsuitable Accommodation Order**
- **The numbers of households and children in temporary accommodation are the highest on record for a fifth consecutive year**
- **Social landlords allocated 44% of their homes to people assessed as homeless, up from 41% - LAs 49%, RSLs 39%**

[Homelessness statistics](#) published by the Scottish Government show:

- The number of new homeless applications in 2023/24 increased by 4% from the previous year to 40,685;
- 1,916 households reported rough sleeping the night before making their homeless application, up 28% from 1,493;
- 33,619 households were assessed as homeless, an increase of 3%;
- The number of open homeless applications - applications that are not yet completed - at 31 March 2024 increased to 31,870, up 8%;

- There were 7,915 cases of households not being offered temporary accommodation by local authorities when they should have been, up 1659% from 450;
- There were 7,400 breaches of the Unsuitable Accommodation Order (UAO), up 41% from 5,240 in the previous year. There is more detail about the UAO [here](#);
- There were 16,330 households in temporary accommodation on 31 March 2024, an increase of 9%;
- 10,110 children were in temporary accommodation at 31 March 2024, an increase of 5%;
- Households spent an average of 226 days in temporary accommodation, a slight increase from 225 days in 2022/23;
- 79% of households assessed as unintentionally homeless secured a tenancy with a social landlord, the same as in 2022/23; and
- The average time from assessment to case closure for applicants assessed as homeless or threatened with homelessness was 278 days, up from 267 days in 2022/23.

ARC data shows:

- Tenancy sustainment for households who were previously homeless has remained at 90%;
- Overall, social landlords let 22,694 homes to people whom LAs had assessed as homeless, up by 8% on 2022/23;
- Social landlords let 44% of all lets to people assessed as homeless, up from 41%;
- LAs let 12,553 homes to people whom they assessed as homeless, up by 9%;
- LAs let 49% of their total lets to people assessed as homeless, the same as in 2022/23;
- RSLs let 10,141 homes to people assessed as homeless and referred by LAs, up by 7%; and
- RSLs let 39% of their total lets to people assessed as homeless, up from 35%.

During 2023/24, there were more new homeless applications made, as well as increases in the number of open cases, instances of rough sleeping, use of bed and breakfast

accommodation, time spent in temporary accommodation and case duration.

There are also more households and children in temporary accommodation than ever before. The snapshot of the number of households and children in temporary accommodation at 31 March has increased year on year since 2017 and 2015, respectively.

Date	Households in temporary accommodation	Children in temporary accommodation
31 March 2019	10,989	6,795
31 March 2020	11,807	7,355
31 March 2021	13,753	7,575
31 March 2022	14,214	8,805
31 March 2023	15,039	9,595
31 March 2024	16,330	10,110

Statutory breaches by local authorities also increased significantly in 2023/24, particularly instances where temporary accommodation was not offered when it should have been. In total, this happened on 7,915 occasions; a 1659% increase on 2022/23. Most of these

(6,260) were in one local authority area, but 10 other local authorities also had at least one instance of not offering temporary accommodation during 2023/24, compared to six in 2022/23.

There was a 41% increase in breaches of the UAO compared to 2022/23. During 2023/24, 25 out of 32 local authorities breached the UAO on at least one occasion; two more local authorities than in 2022/23.

In July 2024 we said in our [early analysis of landlords' 2023/24 data on new homes, lettings and empty homes](#) that both RSLs and LAs have increased both the number and percentage of homes they let to people who were homeless.

Since 2015/16 the number of homes let by social landlords to people who were homeless has steadily increased – except for 2020/21 when the pandemic restrictions limited landlords' ability to let homes – from a total of just over 16,500 in 2015/16 to over 22,600 in 2023/24. That equates to an increase of 37% over the nine-year period, with a 27% increase by local authorities and 52% by RSLs.

The proportion of total lets that social landlords made to people who were homeless has increased over the last ten years. In 2014/15 social landlords let 32% of their total lets to people who were homeless, with LAs letting 39% of their total lets to people who were homeless and RSLs letting 24% of total lets. In 2023/24 this had increased to 44% overall, with 49% for LAs and 39% for RSLs.

Some RSLs told us they are working more closely with their LA partners to provide a greater number of settled lets to those experiencing homelessness, including in areas where there have been local housing emergencies declared.

Gypsy/Travellers

- **Average satisfaction of tenants with landlords' management of sites provided for Gypsy/Travellers decreased to 66% from 76%**
- **Weekly pitch rent increased to £79.59**

Satisfaction amongst Gypsy/Travellers decreased to 66% in 2023/24 from 76% in 2022/23. This is the lowest level of satisfaction amongst Gypsy/Travellers since the introduction of the Charter, and is considerably lower than the satisfaction levels for other services provided by social landlords.

Landlords who manage sites told us that the condition of their site is the main driver for satisfaction levels, and that higher dissatisfaction was mainly because work to upgrade sites was either ongoing, delayed or was required. Conversely, landlords who had recently upgraded sites reported high levels of satisfaction.

The average weekly pitch rent for Gypsy/Traveller sites owned by social landlords increased by 6% to £79.59 in 2023/24, with a range of £50 to £104.94.

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 provided by social landlords, two sites are currently closed whilst being rebuilt or awaiting a decision on being upgraded. Of the remaining 26 sites, 24 comply with Scottish Government's minimum standards and with fire safety requirements; one complies with the minimum site standards but has yet to meet fire safety requirements, and one complies with fire safety requirements but has yet to meet the minimum site standards.

Factored owners

- **Average satisfaction with factoring reduced to 60% - LAs 51%, RSLs 61%**
- **Average annual management fee increased to £115.12 - LAs £65.10, RSLs £131.54**

Satisfaction amongst factored owners has fallen for the second consecutive year to 60%. This is the lowest level of satisfaction among factored customers since the introduction of the Charter.

Many of the landlords reporting low levels of satisfaction amongst factored owners told us that they had a low response rate to their surveys. The information submitted by social landlords shows that across all social landlords, 11% of factored owners responded to the survey. This is in comparison to the 20% response rate which social landlords achieved for their tenant satisfaction surveys.

The average annual management fee for factored owners has increased by 7% to £115.12 in 2023/24.

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
Context

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