



Acuity Briefing August 2022



DATA → INFORMATION → INSIGHT → SERVICE IMPROVEMENT

CONTENTS

- 1 Introduction
- 2 Tenant Satisfaction Measures – Early Findings
- 11 Understanding resident Satisfaction
- 15 Acuity Updates

Welcome to the first Acuity briefing!



Our first briefing focuses on an early look at the Tenant Satisfaction Measures (TSMs) which were introduced into our client surveys from 1st April 2022. We have also included an update on annual satisfaction levels in the sector and potential external influences, as well as the exciting changes at Acuity which have taken place over the last year.

All of our clients in England are awaiting the confirmation on the TSM questions, hopefully, due in September. In order to get ahead, all our clients changed any similar question to the equivalent new TSM question and introduced almost all of the new TSMs into their surveys in Q1 2022/23. This meant for most of our clients, the surveys either got longer - increasing the cost to landlords and residents time commitment or some questions had to be dropped. Whether the new questions bring additional added value to the surveys will take some time to assess and no doubt will form part of the discussions we have with our clients.

The second part of the briefing takes a look at annual satisfaction levels, the impact of the covid pandemic and other external factors which may or may not be impacting performance levels.

And the final section highlights the changes at Acuity – our new team, system and security improvements and new services to look out for.

Hopefully, this newsletter provides you with some useful insight and do let us know your thoughts.



Denise Raine
Director



Alison White
Director



Regulator of Social Housing

Tenant Satisfaction Measures – Early Findings





Overall Satisfaction

Overall satisfaction with services

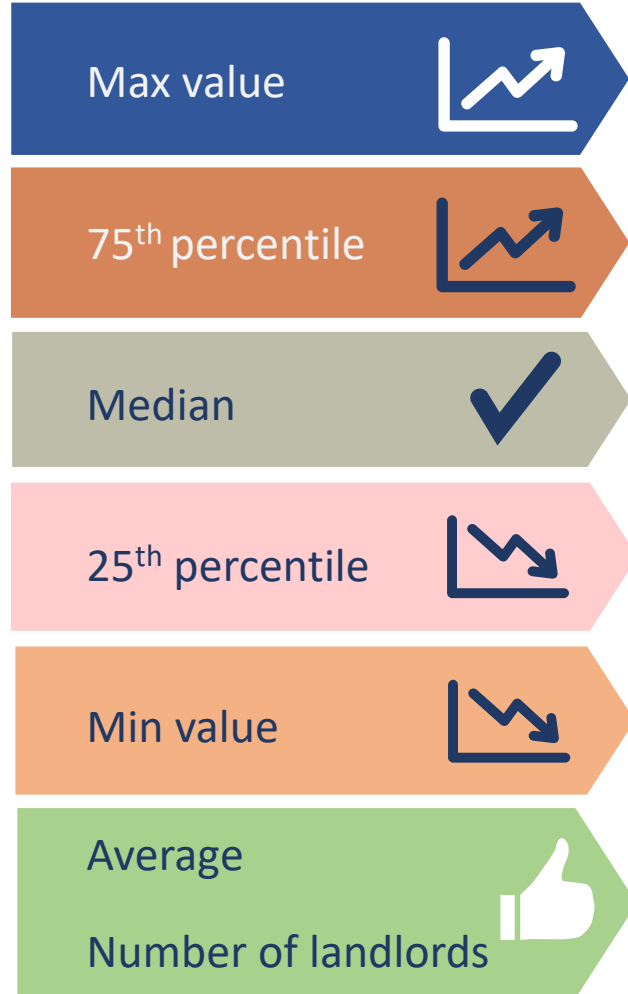
On average 72% of residents are satisfied with the services provided by their landlord. The rating is 6% lower than three years ago.

Landlords in the group

Note – not all of our clients have run TSM based surveys (some clients survey every four or six months, and others are based in Wales or Ireland where the TSMs do not apply).

The group of 29 landlords include 7 based in London and 2 national landlords, 4 ALMOs and 5 Councils.

In terms of size – two have under 1,000 homes, 9 have between 1,000 and 4,999 homes, 7 between 5,000 and 9,999 homes, 6 between 10,000 and 19,999 homes and 5 have over 20,000 homes.



Overall Satisfaction
89%
82%
73%
69%
35%
72%
29

Client Scores

89%	Landlord 1	73%	Landlord 16
86%	Landlord 2	72%	Landlord 17
85%	Landlord 3	72%	Landlord 18
84%	Landlord 4	72%	Landlord 19
84%	Landlord 5	71%	Landlord 20
83%	Landlord 6	69%	Landlord 21
82%	Landlord 7	69%	Landlord 22
82%	Landlord 8	68%	Landlord 23
80%	Landlord 9	61%	Landlord 24
78%	Landlord 10	60%	Landlord 25
78%	Landlord 11	51%	Landlord 26
76%	Landlord 12	49%	Landlord 27
76%	Landlord 13	49%	Landlord 28
76%	Landlord 14	35%	Landlord 29
73%	Landlord 15		





Building Safety







Providing a home that is well-maintained and safe to live in

Around three-quarters of residents feel that their landlord provided a home that is well-maintained and safe for them to live in (77%), however, it is important to note the impact of the change of wording from “safe and secure” asked in the previous Housemark question, which produced an average rating of 80% in 2021-22.

The average fall in satisfaction for landlords asking the two questions was 6% lower; however, this ranged from a fall of 3% to a fall of 28%. Four out of five landlords who saw the greatest falls were in London. Going against the trend, three landlords increased their scores slightly.

Communal areas

Two-thirds of residents who live in a building with communal areas, either inside or outside are satisfied that the communal areas are clean, safe and well maintained (66%).

	Home Safe & Well-Maintained	Communal Clean, Safe & Maintained
Max value 	90%	91%
75 th percentile 	84%	73%
Median 	77%	65%
25 th percentile 	69%	58%
Min value 	36%	43%
Average 	75%	66%
Number of landlords	29	25

Client Scores

90%/91% Landlord 1	76%/79% Landlord 15
89%/77% Landlord 7	75%/64% Landlord 17
89% Landlord 8	74%/66% Landlord 9
87%/87% Landlord 4	73%/61% Landlord 22
86%/85% Landlord 6	73%/73% Landlord 20
85%/68% Landlord 3	70%/73% Landlord 21
84% Landlord 11	69%/67% Landlord 10
84%/58% Landlord 13	68%/70% Landlord 19
83%/59% Landlord 12	64%/55% Landlord 24
83%/59% Landlord 16	62% Landlord 26
83%/55% Landlord 2	61%/65% Landlord 25
82%/78% Landlord 5	59% Landlord 28
79%/55% Landlord 14	55%/43% Landlord 27
78%/55% Landlord 23	36%/46% Landlord 29
77%/63% Landlord 18	











Repairs & Maintenance

The new TSM questions focus on the views of residents who have used the service in the last 12 months, and their views of the service over that period.

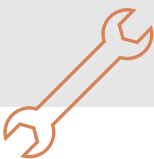
75% of residents are satisfied with the repairs service and 71% with the time taken between the repair being reported and it carried out.

Interestingly, 23 landlords also asked the general Housemark question about the repairs and maintenance service and this was rated much lower, on average at 64%. As this question is not limited to those who had a repair in the last 12 months, the lower result may be reflective of residents' views about repairs over a longer period (including during Covid-19).

	Repairs Service	Time Taken
Max value 	93%	89%
75 th percentile 	82%	79%
Median 	74%	72%
25 th percentile 	68%	62%
Min value 	46%	43%
Average 	75%	71%
Number of landlords	26	25

Client Scores

89% / 84% Landlord 1	74% / 74% Landlord 9
93% / 89% Landlord 6	72% / 62% Landlord 23
88% / 86% Landlord 5	71% / 76% Landlord 14
86% / 84% Landlord 3	70% / 62% Landlord 22
85% / 79% Landlord 7	68% / 63% Landlord 21
85% / 81% Landlord 2	67% / 53% Landlord 18
82% / 72% Landlord 10	66% / 63% Landlord 19
82% / 80% Landlord 16	66% / 58% Landlord 24
81% / 79% Landlord 13	62% / 62% Landlord 25
79% Landlord 11	57% / 62% Landlord 27
79% / 76% Landlord 4	46% / 43% Landlord 29
77% / 79% Landlord 12	
74% / 62% Landlord 15	
74% / 65% Landlord 20	
74% / 72% Landlord 17	











Neighbourhood

In general, most residents are satisfied with their neighbourhood as a place to live (81%), while only 65% are satisfied that their landlord makes a positive contribution to the neighbourhood. It does not make a great deal of sense to make comparisons between the two totally different questions, nether-the-less five clients did ask both questions. The difference between the two questions was on average 19% lower for making a positive contribution (ranging from 13% lower to 25% lower).

Not only are some clients questioning the validity of asking about their contribution to the neighbourhood, but it also seems that residents may be struggling with this question. Of the 3,696 residents who were asked the question in Q1 22/23, 888 residents (24%) answered "Not applicable or Don't know".

	Positive Contribution	Place to Live
Max value 	76%	90%
75th percentile 	74%	88%
Median 	67%	84%
25th percentile 	59%	77%
Min value 	36%	57%
Average 	65%	81%
Number of landlords	16	12

Client Scores

90%	Landlord 2	62%	Landlord 18
88%	Landlord 5	60%	Landlord 19
83%	Landlord 1	60%/85%	Landlord 13
78%	Landlord 17	58%/80%	Landlord 14
76%/88%	Landlord 7	57%	Landlord 25
75%	Landlord 6	56%	Landlord 23
75%/90%	Landlord 21	54%	Landlord 24
75%	Landlord 28	36%	Landlord 29
75%	Landlord 4		
74%	Landlord 12		
73%	Landlord 26		
71%	Landlord 20		
68%	Landlord 15		
67%	Landlord 3		
67%/87%	Landlord 9		











Communications & Information

Three out of five residents feel that their landlord listens to their views and acts upon them (61%) and 76% said they are kept informed about things that matter to them as a tenant.

Impact of don't know

The impact of introducing a Not applicable / Don't know option to the listen to views and acts question has on average increased satisfaction scores by 4% for those landlords who previously included the question in their surveys without this option. The overall average masks mixed fortunes, with ten landlords experiencing only slight changes in satisfaction, while six landlords have seen dramatic increases in satisfaction (8% to 18% higher).

Listens & Keeps Informed

	Listens & Acts	Kept Informed
Max value 	78%	87%
75 th percentile 	71%	83%
Median 	62%	77%
25 th percentile 	54%	73%
Min value 	27%	51%
Average 	61%	76%
Number of landlords	28	25

Client Scores

78% / 87%	Landlord 7	60% / 75%	Landlord 17
78% / 82%	Landlord 2	60% / 77%	Landlord 15
77% / 87%	Landlord 1	58% / 73%	Landlord 9
76% / 87%	Landlord 5	57% / 63%	Landlord 23
76% / 86%	Landlord 6	56% / 73%	Landlord 22
72% / 84%	Landlord 13	55% / 70%	Landlord 19
71% / 85%	Landlord 4	51% / 71%	Landlord 25
71% / 83%	Landlord 10	49% / 67%	Landlord 24
71% / 79%	Landlord 12	49% / 78%	Landlord 18
71% / 83%	Landlord 3	45%	Landlord 26
68% / 77%	Landlord 21	36%	Landlord 28
66% / 74%	Landlord 16	35% / 52%	Landlord 27
65%	Landlord 11	27% / 51%	Landlord 29
62% / 78%	Landlord 14		
62% / 75%	Landlord 20		

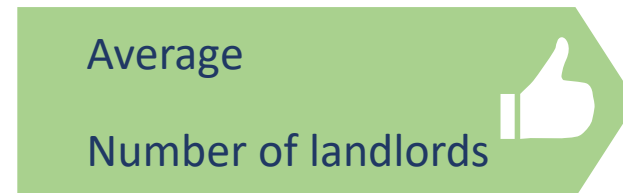
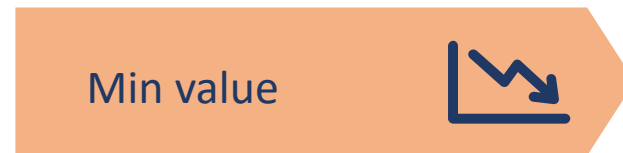
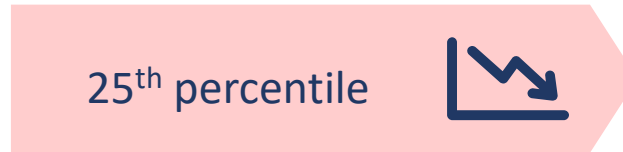




Treat Fairly & With Respect

This question produced one of the highest ratings in the survey with four out of five residents agreeing that their landlord treats them fairly and with respect (79%).

Very few landlords performed below average on this measure, with only one scoring below 50%.



Fairly & With Respect

89%

84%

81%

78%

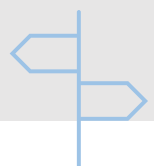
39%

79%

25

Client Scores

89%	Landlord 1	80%	Landlord 16
89%	Landlord 6	79%	Landlord 12
89%	Landlord 7	79%	Landlord 20
87%	Landlord 2	78%	Landlord 22
85%	Landlord 5	77%	Landlord 15
85%	Landlord 13	77%	Landlord 23
84%	Landlord 3	73%	Landlord 24
83%	Landlord 4	66%	Landlord 25
83%	Landlord 18	58%	Landlord 27
83%	Landlord 21	39%	Landlord 29
82%	Landlord 10		
82%	Landlord 14		
81%	Landlord 19		
80%	Landlord 9		
80%	Landlord 17		











ASB & Complaints Handling

Anti-Social Behaviour

Two-thirds of residents are satisfied with their landlord's approach to handling anti-social behaviour (64%).

Complaint Handling

Three out of five residents are satisfied with their landlord's approach to complaints handling (58%).





	Handling ASB	Complaints Handling	Client Scores	
Max value 	80%	76%	80%/76% Landlord 1	56%/54% Landlord 15
75 th percentile 	73%	68%	80%/70% Landlord 6	55%/59% Landlord 19
Median 	63%	60%	75%/72% Landlord 2	55%/45% Landlord 22
25 th percentile 	55%	49%	74%/75% Landlord 5	53%/44% Landlord 25
Min value 	43%	22%	74%/68% Landlord 7	53%/49% Landlord 23
Average 	64%	58%	74%/60% Landlord 21	52%/42% Landlord 24
Number of landlords	22	21	73%/69% Landlord 4	43%/22% Landlord 29
			71%/61% Landlord 9	57% Landlord 20
			67% Landlord 16	
			65% Landlord 12	
			65%/61% Landlord 14	
			62%/48% Landlord 18	
			61%/61% Landlord 3	
			60%/62% Landlord 13	
			59%/59% Landlord 17	





Non-TSM Questions

- 73% of tenants are satisfied with the quality of their home
- 69% find their landlord easy to deal with
- 82% are satisfied with the value for money of their rent (64% service charge)
- Average Net Promoter Score is 13

	Service Charge	Rent	Quality of Home	Easy to Deal With	NPS
Max value 	80%	92%	92%	90%	58
75 th percentile 	73%	87%	81%	80%	32
Median 	62%	85%	72%	73%	12
25 th percentile 	58%	79%	69%	61%	1
Min value 	46%	63%	54%	32%	-35
Average	64%	82%	73%	69%	13
Number of landlords 	8	11	19	23	14



Landlord Characteristics

Landlord	Location	Tenure	Category	No. Properties
Landlord 1	National	HfOP	HA	10,000 - 20,000
Landlord 2	Not London	GN + HfOP	HA	5,000 - 10,000
Landlord 3	Not London	GN + HfOP	HA	10,000 - 20,000
Landlord 4	National	HfOP	HA	> 20,000
Landlord 5	Not London	GN + HfOP	ALMO	1,000 - 5,000
Landlord 6	Not London	GN + HfOP	HA	10,000 - 20,000
Landlord 7	Not London	GN + HfOP	HA	> 20,000
Landlord 8	Not London	GN + HfOP	HA	1,000 - 5,000
Landlord 9	Not London	GN + HfOP	HA	5,000 - 10,000
Landlord 10	Not London	GN	HA	1,000 - 5,000
Landlord 11	London	GN + HfOP	HA	1,000 - 5,000
Landlord 12	Not London	GN + HfOP	ALMO	5,000 - 10,000
Landlord 13	Not London	GN + HfOP + SO	HA	5,000 - 10,000
Landlord 14	Not London	GN + HfOP	Council	5,000 - 10,000
Landlord 15	Not London	GN + HfOP	ALMO	1,000 - 5,000
Landlord 16	Not London	GN + SO	HA	1,000 - 5,000
Landlord 17	Not London	GN + HfOP	Council	> 20,000
Landlord 18	Not London	GN + HfOP	Council	1,000 - 5,000
Landlord 19	London	GN + HfOP	Co-op	1,000 - 5,000
Landlord 20	Not London	GN + HfOP	ALMO	10,000 - 20,000
Landlord 21	London	GN + HfOP	HA	1,000 - 5,000
Landlord 22	Not London	GN	HA	5,000 - 10,000
Landlord 23	Not London	GN + HfOP	HA	> 20,000
Landlord 24	Not London	GN + SO	HA	1,000 - 5,000
Landlord 25	London	GN + HfOP	ALMO	10,000 - 20,000
Landlord 26	Not London	GN + HfOP	HA	< 1,000
Landlord 27	London	GN + HfOP	Council	10,000 - 20,000
Landlord 28	London	GN + HfOP	HA	< 1,000
Landlord 29	London	GN + HfOP	HA	1,000 - 5,000



Understanding Satisfaction





Satisfaction Shapers

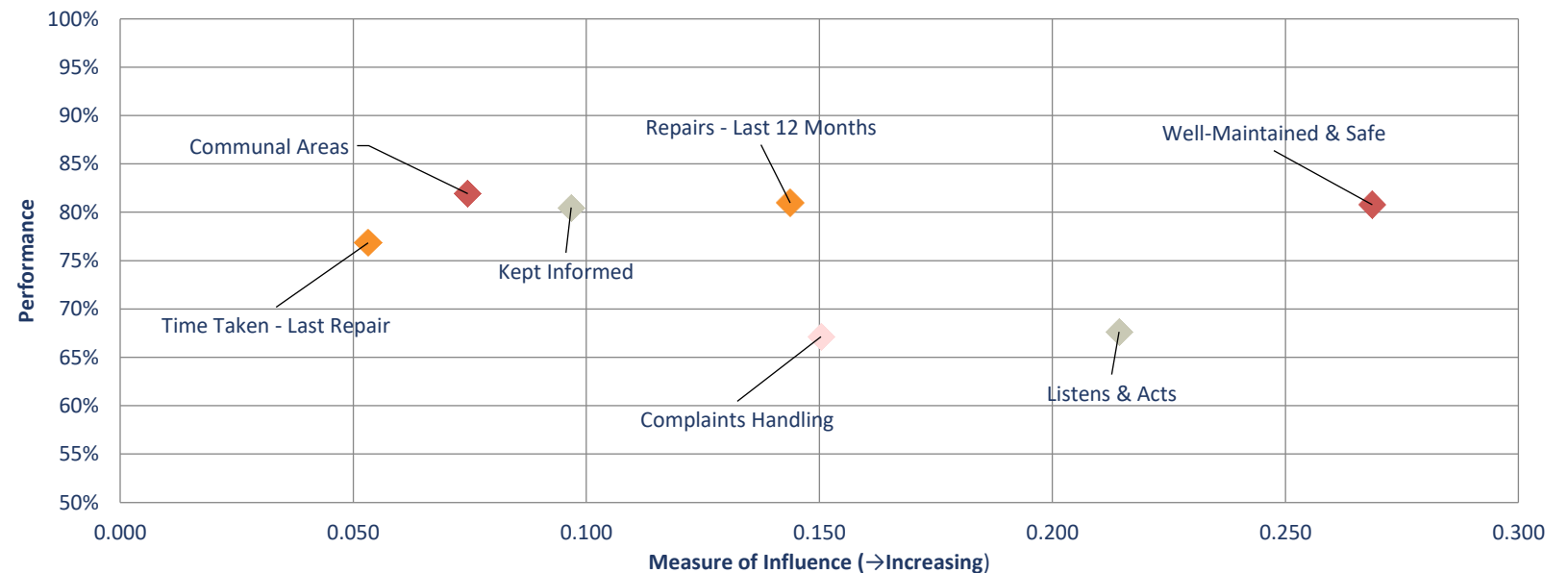
One of the key outputs of resident satisfaction surveys is key driver analysis, which is useful for identifying the service areas in which increases in satisfaction could potentially lead to an increase in the overall satisfaction rating. These are the internal factors that were referred to earlier, in that the landlord can make efforts to improve these areas which are likely to lead to more satisfied residents.

When we run key driver analysis, we use regression analysis in an attempt to understand what is driving satisfaction with a landlord. The analysis reminds us that the information gathered in the survey does not tell the whole story, there are other external factors which influence how a resident responds to a survey. From a statistical point of view, the data captured to produce the chart explains 64% of the pattern. The other factors can be internal (things that landlords can influence) or external (things outside the control of the landlord).

When all of the raw data responses from Q1 2022/23 are taken from the Acuity survey system and multiple regression analysis is performed, a number of measures are highlighted as being significant drivers of overall satisfaction.

The most important driver of overall satisfaction across all clients combined appears to be residents feeling that their homes are well-maintained and safe for them to live in. This is followed by the landlord listening to the views of residents and acting upon them.

There are a further five significant factors considered to be less important than the preceding two however still significant drivers of overall satisfaction. These factors are; complaints handling, repairs service in the last 12 months, being kept informed, the safety and maintenance of the communal areas and the time taken to complete the most recent repair.





External Factors Potentially Affecting Satisfaction

COVID-19

From March 2020 until March 2021 the country endured three lockdown periods and has been emerging from lockdown ever since. Social landlords radically changed the way they deliver their services and continue to operate in a different way than before the pandemic. When reviewing national patterns over time it is also important to remember that different parts of the country were locked down at different times.

Grenfell

The ramifications of the tragedy which took place at Grenfell tower just over five years continue to have an impact on the sector and are often in the news.

Brexit

Brexit has impacted the sector in many ways, including creating sudden impacts on many tenants' financial circumstances brought about by changes in employment and also the financial impacts upon organisations within the sector and supply shortages.

Government & Political Changes

The continual turbulence and rising distrust of the government (Edelman Trust Barometer, 2022) is likely to be impacting many tenants' satisfaction with their landlords, organisations they often perceive as being closely linked to local authority.

Cost of Living Crisis

Rising energy and living costs are undoubtedly influencing factors towards tenant satisfaction, with recent research from the Food Foundation finding that more than 2 million adults in the UK have skipped meals for the whole day in the past month as they cannot afford to eat.

Well-being and mental health

The pandemic and many of the issues mentioned here have had a tremendous impact on people's mental health and their well-being.

Blended Working Patterns

As people are encouraged to return to the office the working patterns of many households have not returned to normal with a high percentage of the workforce still working from home. The trend for open plan living and lack of space/spare bedrooms means for some residents working from home is not ideal.

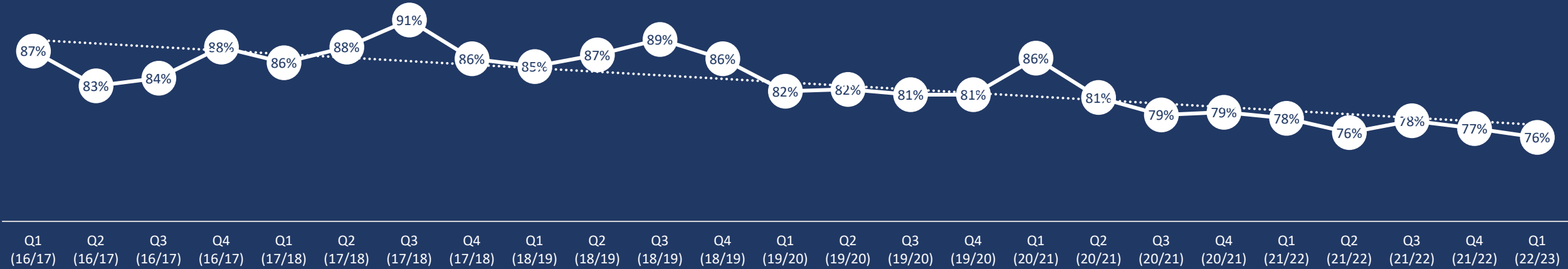
Anti-Social Behaviour

One of the impacts of lockdowns was people were at home more often and the recent warm weather has also contributed to increased levels of anti-social behaviour. Landlords are also experiencing an increase in the number of complaints they receive.



Changing Satisfaction – Acuity Clients

Overall Services (Acuity Clients, Median Scores)



Over the last three years, Acuity has been monitoring satisfaction levels from around 50 of our clients that undertake quarterly tracker surveys. The chart shows the impact of Covid-19 on the median scores for our clients, as well as the scores prior to the pandemic, and backs up Housemark’s findings. The dotted line shows the trendline is downward over this period (Q1 16/17 to Q1 22/23).

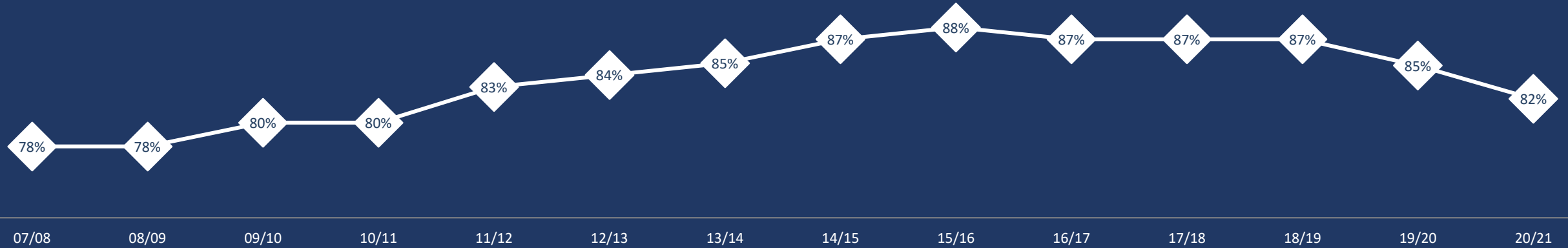
Satisfaction initially rose in Q1 20/21 as landlords reached out to help residents before dropping considerably in the summer (Q2 20/21) as landlords withdrew frontline services and responsive repairs. Over the last two years, satisfaction has remained suppressed and has not reached the higher levels found before the pandemic. Acuity estimates that satisfaction is on average 8% below that found pre-pandemic.

However, not everything is doom and gloom. Early data from Acuity tracking clients who have completed their Q1 2022/23 resident satisfaction surveys indicates that satisfaction with overall services is on the rise for around 30% of our clients. While around half experienced very little change, a further 20% saw further falls. Currently, the average is up by around 2% compared with Q4 2021/22 and while this might not be a rise back to the dizzy heights of 2017/18, hopefully, it is signalling a change to the well-established downward trend. Having said that the emerging cost-of-living crisis is likely to have a significant impact on residents.



Changing Satisfaction – National Pattern

Historical satisfaction with services provided (NHF/Housemark - general needs residents)



National trend prior to the pandemic

While difficult to remember a time before covid, in the year preceding the pandemic we began to notice a slight fall in satisfaction levels.

The chart above is based on the results from around 250 landlords across the country and shows the Housemark overall satisfaction figures over a period of years. There was a steady rise from 2007/08 to a peak in 2015/16 but since then satisfaction has levelled off before it started to fall in the two years just before the pandemic (2019/20 and 2020/21).

Summary

Satisfaction has clearly been on a downward trend for some time, even before COVID, however, this drop was accelerated during the periods of enhanced restrictions and although it might be too early to call it, Q1 2022/23 results are looking promising. Repairs, easy to deal with and listening and acting matter the most to residents with landlords often underperforming with regard to listening and acting. Finally, the TSMs are about to shake up the world of resident satisfaction, with early results showing some positive signs and some potentially more negative ones.



Acuity Updates

acuity
making sense of housing

Team Acuity



Meet the team! We have grown considerably over the past few years, taking on new members of the team and expanding our skillsets to meet the needs of our rapidly growing client base.

NEW



Colin Slocombe
Operations Director

NEW



Jason Thompson
Research Executive

NEW



Beth Leathley
Graduate Research Executive

NEW



Lesley Vuskans
Business Support Officer

NEW



Carla Budd
Team Leader



Denise Raine
Director



Mark Anderson
Director



Alison White
Director



Heather Metivier
Project Coordinator



Pete Lomax
Project Manager



Meet Our Newest Team Members



Colin Slocombe
Operations Director

Colin joined Acuity in June 2022, and as Operations Director is responsible for some of our key business areas. Colin has over 20 years of experience in undertaking research activities for a wide variety of clientele including the social housing sector. He has a wealth of experience in delivering research projects from survey design through to data analysis and reporting.



Beth Leathley
Graduate Research Executive

Beth joined the Acuity team in June 2022. Since completing her BA in History & Politics and MA in Public History, Beth has worked in a number of research and engagement positions involving website design, project coordination and high-level independent research.



Lesley Vuskans
Business Support Officer

Lesley started working for Acuity over 2 years ago as a telephone interviewer. After a brief period away, Lesley has returned as our Business Support Officer applying her considerable housing background to cover a wide variety of business areas.



Data security developments

Each year Acuity works hard to ensure the security of our systems. You may not be aware of all of the things we have done recently to protect our systems and your data.

ISO20252:2019 - Acuity complies with, and holds ISO20252:2019, the industry standard for Information Security within the Market Research sector. QMS International conduct annual Internal and External audits to ensure compliance with Industry standards and Acuity's Information Security policy.

Cyber Essentials Plus – A Government-backed and industry-supported scheme that helps businesses protect themselves against the growing threat of cyber attacks and provides an outline of the controls organisations should have in place to protect themselves. Cyber Essentials Plus is the highest level of certification offered, it involves rigorous testing of our systems to make sure that we are protected against hacking and phishing attacks.

Multi-Factor Authentication - Access to Acuity applications is authenticated by Microsoft Authentication and Active Directory whereby application users are forced to authenticate using a Microsoft account enforcing multi-factor authentication in order to gain access. Access to Acuity MS 365 system (email, SharePoint file system and Azure access) is not possible without Multi-Factor Authentication.

Vulnerability and penetration testing – Acuity works with an external company that provides annual penetration tests and vulnerability scans, assisting Acuity to meet the vigorous requirements needed to achieve and maintain our accreditations.

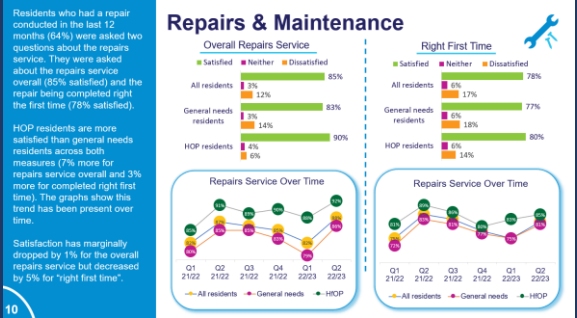


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What else is new? Or in the pipeline?



New report styles – We are currently overhauling our reports, moving away from wordy documents to more colourful infographic reports in PowerPoint slides. We hope the new style will be more interesting to read and distributed more widely. We are also working on providing greater actionable insight in the reports. We will let clients have a copy of the new style reports for approval before changing anything.

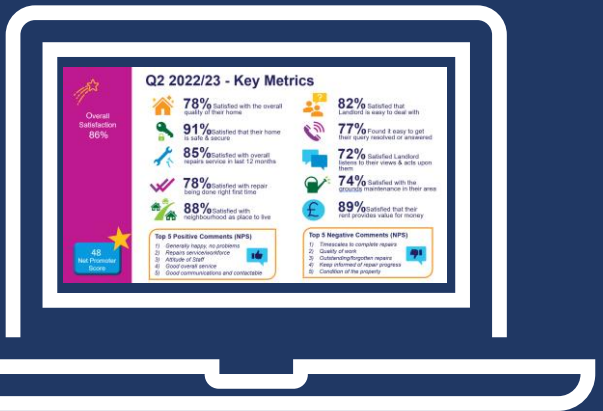
Resident dashboards – Work is underway to produce a range of options to allow clients to share survey results with residents. This could be a one-page pdf document, a resident dashboard or an interactive / animated report viewer for your website.

Sentiment analysis – We are currently in talks with a company that provides sentiment analysis with the aim of bolting their software onto the data we capture from probing and open-ended questions in each survey. It is early days, but we think this will be a great addition to our services.

Client survey – Do watch out for (and hopefully complete) our bi-annual client survey, which will be out in September. We would love to know what you think about Acuity and if there is anything we can do to improve our service.

Resident interviewers - Acuity remains strongly committed to adding social value and providing opportunities for social housing residents to develop as research professionals. We offer opportunities to train and employ residents to work as home-based interviewers in our virtual call centre. Acuity has always been a virtual company, which not only reduces employee commuting; resulting in carbon, money and time savings, but enables us to employ a diverse range of employees who may not otherwise be able to gain employment.

For more information on any of the above, please contact Denise or Alison.



WORK AT HOME

JOIN OUR TEAM!

WE'RE HIRING

acuity

TELEPHONE INTERVIEWER

About Acuity

Acuity Research & Practice provide resident satisfaction (STAR) survey and benchmarking services, helping housing providers to improve services and engage with their tenants through an understanding of satisfaction, performance and profiling data.

We focus on providing information that will inform performance improvement: positive outcomes for providers and tenants, not just box-ticking. Our services are highly flexible, always carefully tailored to the requirements and budgets of our customers.

We have been providing consultancy services to the social housing sector for over 24 years. We work in partnership with Housemark to support the benchmarking activities of smaller and specialist housing providers.

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Registered in England No. 3503391
Registered office: PO Box 395, Umberleigh, Devon, EX32 2HL

UK Tel: +44 (0) 01273 287114
UK VAT Registration No. 889 440 81