



Year-in-numbers
2021/2022

About this report

When the COVID pandemic started in March 2020, there were many unknowns – how long it would last, how severe the effect would be, how many people would become infected. As lockdown was introduced we knew that Housemark members needed up-to-the-minute data to help with decision making in an environment where historical comparisons were simply not enough. Our members needed on-time data to compare with others facing the same issues at the same time.

As a response, Housemark started collecting data for a short suite of key performance indicators monthly – helping our members understand critical measures like arrears, repairs and sickness absence in the wider context.

The popularity of this on-time monthly benchmarking has grown with 234 social landlords UK-wide now regularly taking part.

This report includes our hot-off-the press results for the 2021/22 financial year, months before this data is available anywhere else, alongside our high-level analysis of the sector's progress in recovering from the pandemic and addressing key challenges like building safety, resident engagement and channel shift.

Monthly Pulse

Monthly Pulse is a survey covering 15 key performance metrics chosen in consultation with our members, which reflect current landlord and regulatory priorities, as well as providing insight into the ever-changing operating environment. Taking part in Monthly Pulse enables landlords to track performance in context and rapidly adapt.

Our monthly analysis reports are available exclusively to participants and provide insight into performance, enhanced by feedback gathered from interactions with landlords and other stakeholders. Only with Housemark will you receive the on-time data and insight needed to pivot services and build an agile data-driven culture.

Monthly Pulse is just one of many research and analysis tools available to Housemark members. Our [2022/23 member offer](#) has full details of the opportunities we provide members with, to learn from research, analysis and in-person experiences.

Year-in-numbers

We have used Monthly Pulse as the main source of data for this analysis. Where appropriate, figures have been annualised to provide comparisons with the previous year (sourced from Housemark's annual cost, performance and satisfaction benchmarking).

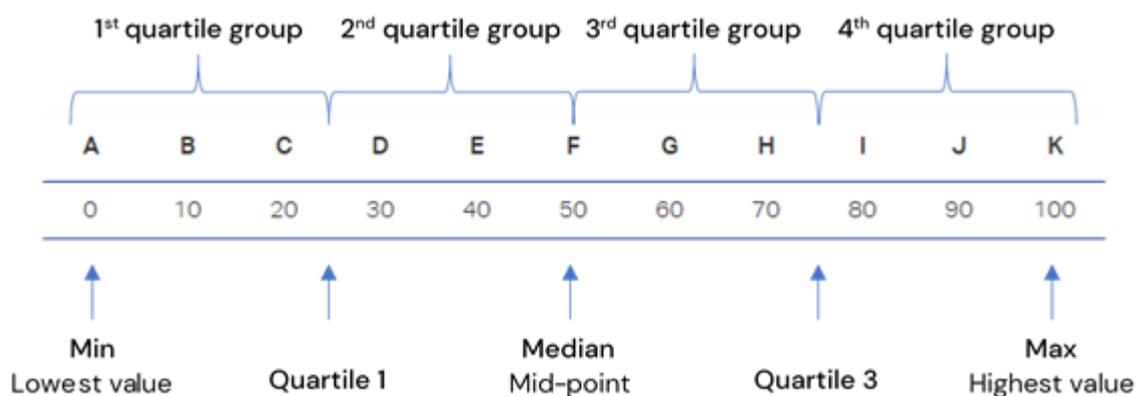
By making a year-on-year comparison, this report highlights how performance in the previous year (2020/21) was significantly impacted by the pandemic. Many services including lettings and non-emergency repairs were suspended at various points in the year, which had a significant impact on repairs volumes and vacancy rates.

The financial year to March 2022, shows performance gradually returning to pre-pandemic norms over the course of the year for many operational measures, but resident feedback remains challenging.

As landlords grapple with new challenges, such as the cost-of-living crisis, price inflation, consumer regulation and net zero targets, reliable and timely data has never been more important. Whilst the below figures represent sector averages, understanding your context is vital to making evidence-based decisions that drive value and improve the tenant experience.

Only with Housemark membership can you unlock this vital data, insight and contextual analysis that enables you to make the right decisions and evidence progress.

Quartiles



Medians and quartiles are used throughout the report and indicate how your organisation compares to the other participants. With the data points arranged consistently in numerical order, the median is the middle value and the quartiles divide the dataset into four equal parts.

The 4th quartile group represents the organisations with the highest values and the 1st quartile group, the lowest – regardless of whether having a high value is seen as positive or negative. Quartile 1 marks the point between the first and second quartile groups and is a lower number than the median. Quartile 3 marks the point between the third and fourth groups and is higher than the median.

Housemark Monthly Pulse Year-end 2021/22

Measure	Quartile 1	Median	Quartile 3	Median YE 2020/21
Formal complaints received per 1,000 units (cumulative)	13.35	25.41	55.54	21.85
Percentage of complaints resolved within timescale	72.3%	91.4%	100.0%	81.6%
Percentage of customer contact received via digital channels	20.1%	24.4%	36.9%	-
Satisfaction with the service their landlord provides (perception)	77.3%	80.0%	86.5%	82.5%
Proportion of homes with a valid gas safety certificate	99.84%	99.98%	100.00%	99.98%
Proportion of properties with EICR certificates up to five years old	85.00%	98.00%	99.72%	95.3%
Emergency repairs completed per property (cumulative)	0.50	0.68	0.92	0.81
Non-emergency repairs completed per property (cumulative)	1.83	2.23	2.79	2.05
Satisfaction with repairs completed right first time	82.8%	87.7%	93.1%	-
Satisfaction with repairs (transactional)	80.7%	88.6%	93.2%	89.2%
True current tenant Arrears	2.08%	2.89%	3.61%	2.76% ¹
Proportion of social homes let (cumulative)	5.5%	6.8%	8.1%	5.4%
Proportion of dwellings vacant and available to let	0.32%	0.58%	1.05%	0.64%
Cumulative working days lost due to sickness absence per employee ²	7.71	10.14	12.38	8.15
New ASB cases reported per 1,000 units	22.2	35.5	63.6	55.8

Analysis

Complaints

Throughout the 2021/22 year we have tracked some key differences between England, where the complaint handling code was set up in 2020 and Scotland, where the SPSO code is mature and well-established. Scottish landlords have consistently recorded complaints rates at double the size of those in England.

As the English complaint handling code becomes more established, including changes introduced on 1 April 2022, we expect to see a continuation of rising complaints volumes, which over the medium term, will see English landlords start to handle similar volumes to counterparts in Scotland.

Digitalisation

We found that the pandemic led to a huge shift towards digital forms of contact. Within the social housing sector, the proportion of electronic contact rose from a pre-pandemic 12% to 26% in April 2021.

For most landlords, digitalisation has remained level through 2021/22, with communication by telephone continuing to be the most used contact method between landlords and residents. Since May 2021, the overall proportion of digital contact has remained at 25% or 1 in 4 contacts with landlords, though some landlords record more than 50% of contact digitally. However, not all residents are the same and it is important that landlords continue to provide a range of contact channels alongside quick and easy resolution if they wish to provide an excellent customer experience.

Satisfaction

We have tracked falling satisfaction rates over the last year as residents' expectations of services rose faster than landlords' ability to meet demand while still recovering from the pandemic and dealing with external factors, such as labour and materials shortages.

In the years before 2020, average satisfaction rates were around 85%, by March 2022 this had fallen to 80%. Given the time-lag between customer experience and customer perception, we estimate that satisfaction rates will continue to be lower until service improvements start to be felt by residents.

Context can significantly affect satisfaction scores, with large urban landlords reporting results significantly lower than smaller, more rural counterparts. For an in-depth understanding of your satisfaction drivers, contact data@housemark.co.uk

Building safety

Monthly Pulse picks up on two specific requirements – gas and electrical safety. The year 2020/21 was difficult for many gas servicing teams as many tenants were unsure about

¹ Based on nearest equivalent measure in Housemark Annual Performance

² Cumulative figures converted from Monthly Pulse percentages based on number of working days in each month.

providing access during the earlier stages of the pandemic. However, compliance effectively returned to pre-pandemic levels during 2021/22.

Electrical safety had not been measured in a comparable sense by the sector, so following consultation with members during our Building Safety Research project, we adopted a best practice measure of an inspection every five years. Our first year of data showed a rise from 96% in April to 98% at year-end.

Responsive repairs

For two decades, Housemark repairs benchmarking data showed that, on average, social housing tenants reported 3–4 repairs each year. The unprecedented restrictions brought in by the pandemic disrupted this. Our 2020/21 data shows that volumes dropped by 15% to an average of less than three repairs per property. This equates to around 2.5 million fewer repairs completed by social landlords in the year to March 2021.

Over the course of 2021/22, non-emergency repairs volumes recovered gradually but the annual figures remain lower than the pre-pandemic average. As well as dealing with COVID, repairs teams have suffered from price inflation, material shortages and scarcity of skilled labour. The process of catching up to a pre-pandemic position has taken all year and by the final month (March 2022), the average landlord reported overall repairs volumes similar to pre-pandemic averages. This suggests that most landlords have entered the 2022/23 financial year with repairs services back on track.

Arrears

Since the 2020 increase in arrears stemming from the first lockdown's dramatic drop in economic activity, the pattern of arrears rates over the 2021/22 financial year has been much steadier. In spite of some good performance, the cost of living crisis affecting people across the UK is having some negative impact on arrears figures.

Our investigation of arrears drivers shows that overall sector-wide figures feature some very positive results from groups of landlords managing highly effective rent collection operations. These landlords tend to be smaller, locally focussed housing associations and ALMOs. By contrast, we also have data showing that larger, urban-based local authority landlords are seeing arrears rates as high as 10%.

Housemark forecasts further increases in arrears in 2022/23 as cost-of-living increases continue to bite. We estimate that year-end 2022/23 median results will be closer to 3%.

Lettings

When lettings all but halted at the start of the pandemic, the number of vacant dwellings more than doubled. It has taken the average landlord a considerable length of time to recover from this period. While other landlord activities such as gas servicing and income management recovered fairly quickly from the disruption of lockdown one, we ended 2021/22 with vacancy levels still slightly higher than pre-pandemic with no discernible increase in lettings to fill the voids.

This means void loss figures for the 2021/22 financial year are still likely to be higher than pre-pandemic levels, but top performing landlords will be entering 2022/23 with the voids backlog largely cleared.

Sickness absence

Throughout the pandemic, we have found a relationship between a rise in COVID infections and increased absence. As restrictions eased, the chance for the latest strains of COVID to spread was higher. Even though vaccination and reportedly weaker types of COVID resulted in far fewer hospitalisations than previous waves, people were often too sick to work.

Working from home tends to result in lower sickness absence levels, and despite the pandemic, the overall proportion of days lost to sickness absence in 2020/21 was lower than pre-pandemic levels – albeit with some peaks that closely mirrored the waves of the virus.

In 2021/22 sickness absence levels have increased once more and have now almost returned to pre-pandemic levels. This may in part be due to the lifting of COVID restrictions and the gradual return to the office.

Anti-social behaviour

Our annual anti-social behaviour (ASB) data shows that the number of new cases reported during 2020/21 increased by around 15% – this corroborates our findings early on in the pandemic when ASB reportedly increased as ‘lockdown fatigue’ set in.

Through 2021/22 we have found that new ASB case rates have fluctuated in line with the seasonal norms that we recorded over a decade of detailed data collection, with higher rates in summer compared to winter. However, after a year with demonstrably higher ASB volumes, 2021/22 appears to show a return to more ‘normal’ volumes of ASB.