



Regulator of  
Social Housing

# Stakeholder survey results 2019

November 2019



# Introduction

- This is the second consecutive year that the Regulator of Social Housing has carried out a stakeholder survey and we intend to conduct a similar survey annually
- We have sought the views of registered providers and other stakeholders on a range of issues
- We will use the results to inform
  - our performance monitoring
  - continuous development of our operational approach
  - our corporate planning

# Key findings

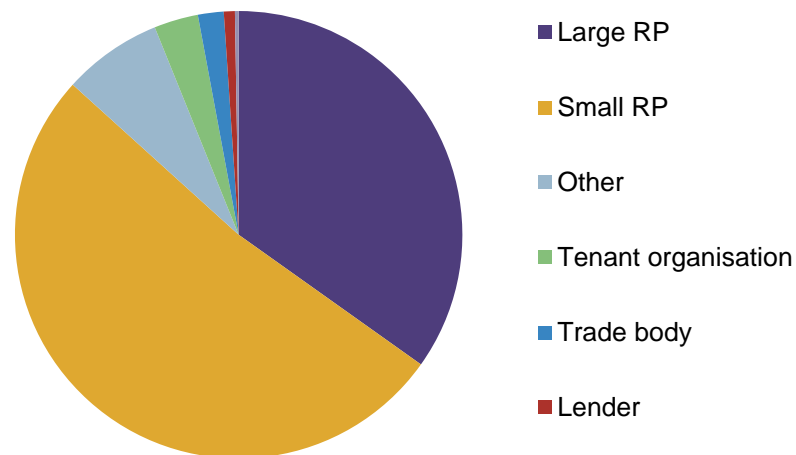
- 531 responses in total, up from 363 in 2018
- 91% of respondents agree that the regulator takes action to ensure confidence in the sector is maintained
- 88% of respondents agree that the regulator takes appropriate action in respect of the consumer standards
- Overall, 74% think that our approach to regulation is risk-based and assurance-based.
- Overall, 84% of respondents find the range of regulator's publications very or somewhat useful with the Codes of Practice and Regulating the Standards rated as very or somewhat useful by at least 90%

# Responses

- 531 stakeholders started the survey, with 376 (71%) completing every section – this is a 59% increase in the number of completed responses (237) compared with last year's survey
- 82% of respondents were registered providers (RPs) compared to 93% in 2018
- 131 large providers completed the survey, representing 59% of all providers within this group. 195 completed responses were received from small providers, representing 19% of this group.
- Respondents also included tenant organisations, trade bodies, lenders/investors and other stakeholders.

Q1: Which stakeholder group do you fall into? (Complete responses)	2019 All Responses	Complete responses	% of total completed responses
Large Registered Provider	167	131	35%
Small Registered Provider	247	195	52%
Other	47	27	7%
Tenant organisation	28	12	3%
Trade body	9	7	2%
Lender	3	3	1%
Investor or credit rating agency	1	1	0%
Government department	1	0	0%
No Answer	28	0	0%

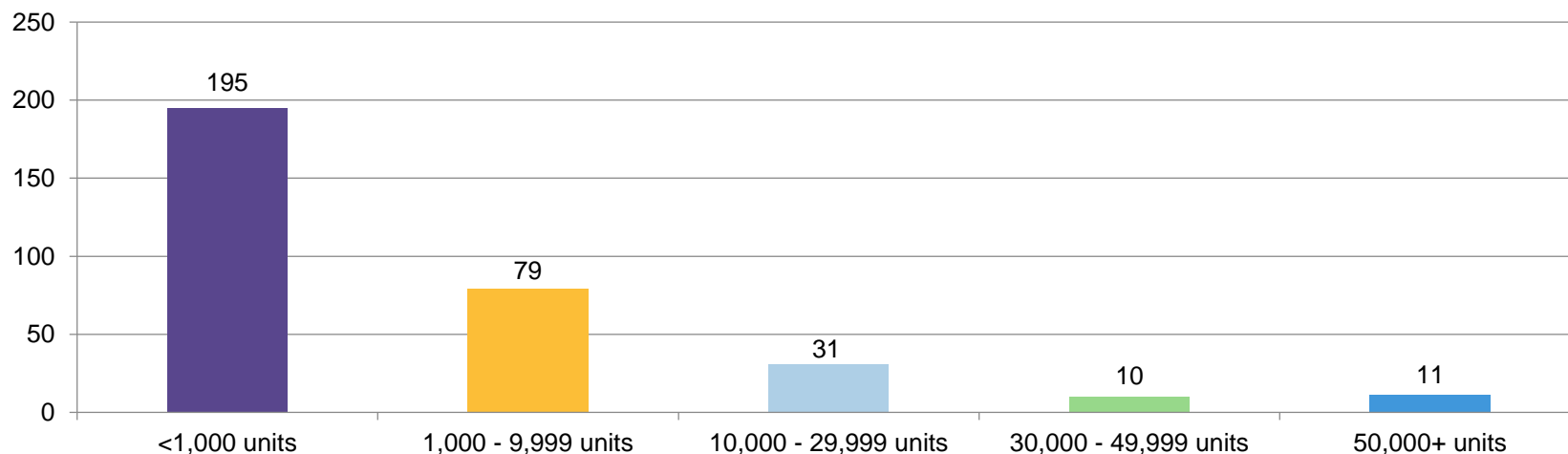
**Proportion of complete responses by stakeholder group**



# Profile of respondents

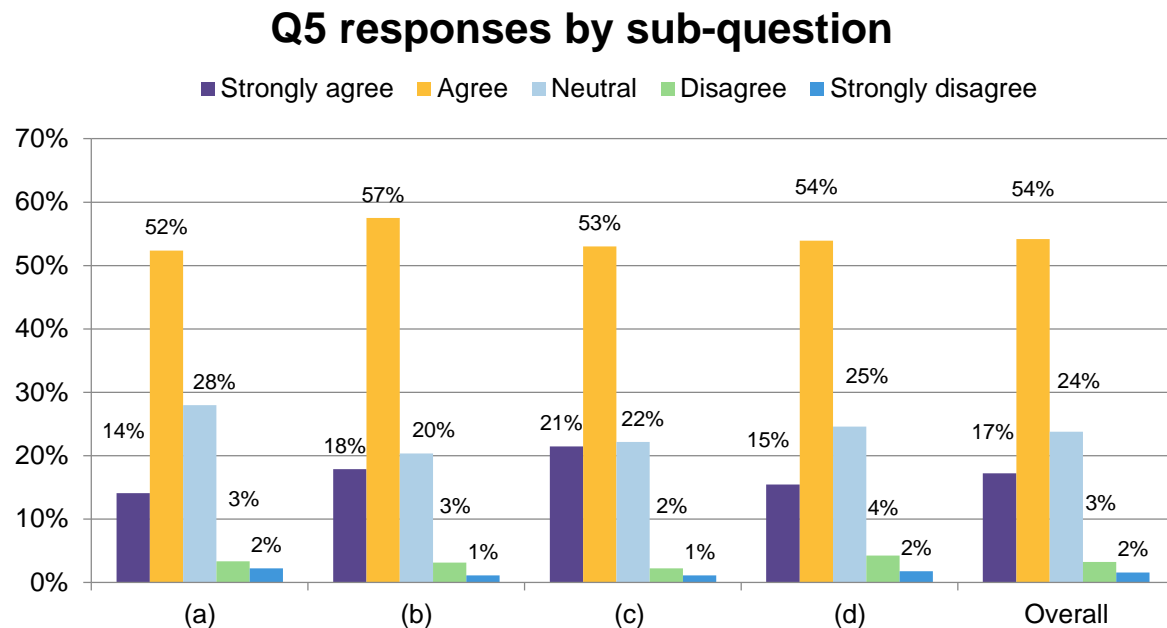
- Among registered provider respondents:
  - 60% represented smaller providers (<1,000 units), and
  - 40% represented larger providers (>1,000 units)
- 304 providers referred to themselves as a “Housing Association”, 9 as an ALMO and 10 as for-profit providers

**Complete RP respondents by stock size**



# Section 1: Regulatory framework (Q5)

Q5: To what extent do you agree that:	
(a)	the regulator's approach is co-regulatory
(b)	the regulator meets its objectives to be proportionate and minimise interference
(c)	the regulatory framework and our approach to regulation are consistent with our objectives on economic regulation
(d)	the regulatory framework and our approach to regulation are consistent with our objectives on consumer regulation

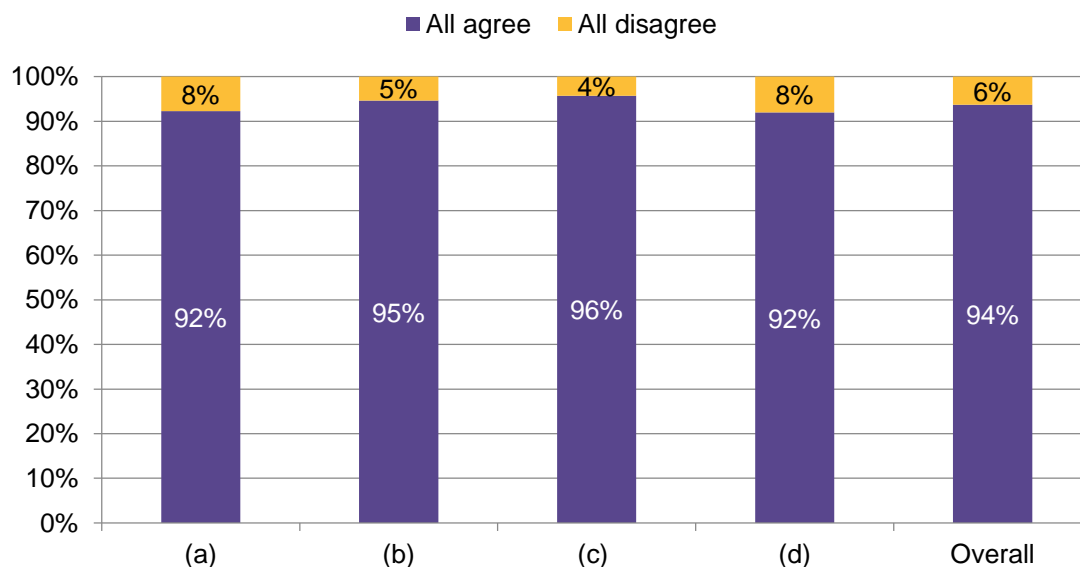


- 71% of respondents answered Q5 positively, and 5% answered negatively. In 2018, these were 91% and 9% respectively, but comparisons should be treated carefully as this year, we gave the option of “neutral” answers for a number of questions.
- The most positively answered question was (b) at 75%
- The least positively answered question was (a) at 66%
- Responses were fairly similar across stakeholder groups

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**Q5 all agree and all disagree**



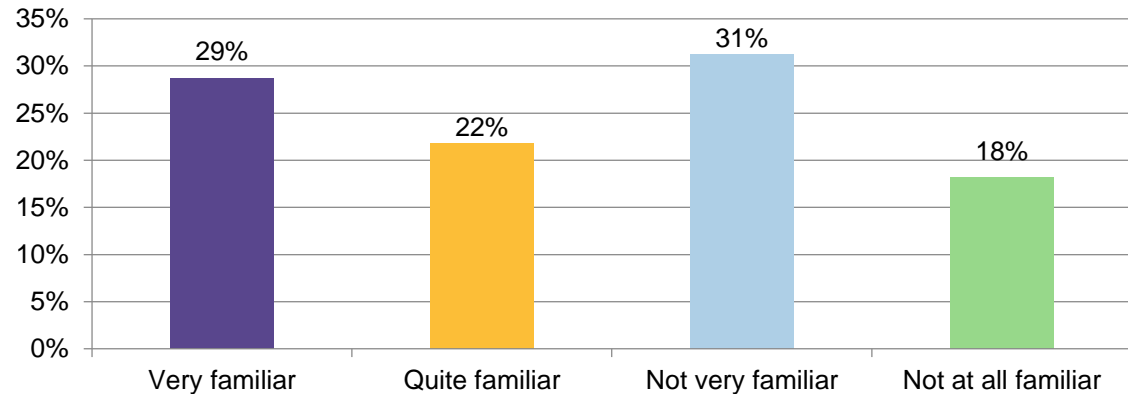
- To enable comparison with 2018 we have looked at the results just for respondents who either agreed or disagreed
- Overall, 94% of respondents who gave either a positive (strongly agree/agree) answer or a negative (strongly disagree/disagree) answer agreed with the question
- 96% of respondents who gave a positive or negative answer to this question agreed to sub question (c)
- When looking only at those who gave a positive or negative response, more than 90% agreed with the question

## Section 2: Regulatory approach (Q6)

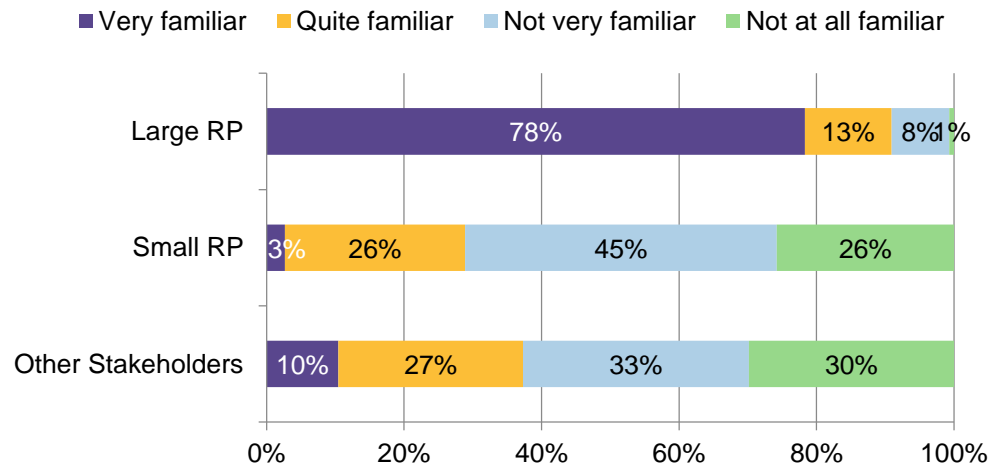
**Q6**

How familiar are you with the key elements of our In Depth Assessment (IDA) model?

**Q6 responses**



**Q6 by stakeholder type**



- 51% of respondents are very or quite familiar with the IDA model
- Large RPs (91%) are very familiar with the IDA model, while other stakeholders and small RPs are less aware



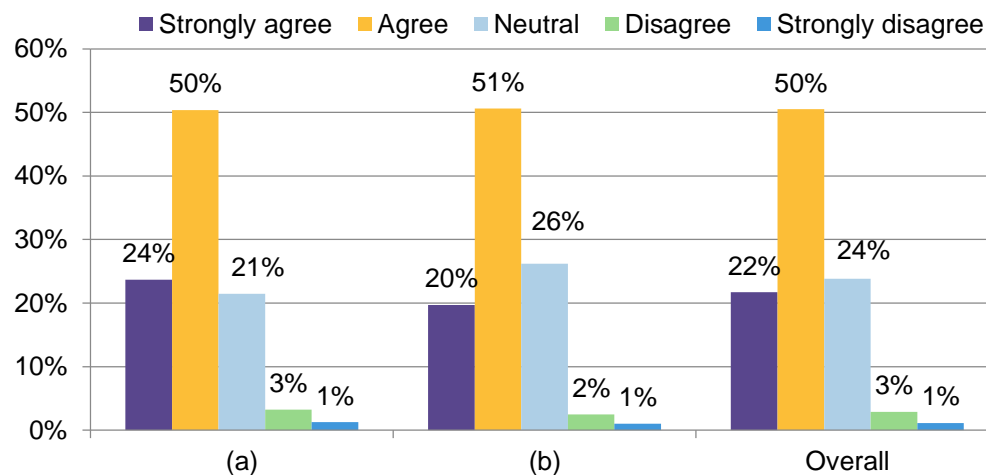
# Section 3: Delivery and practice (Q8)

**Q8: To what extent do you agree that:**

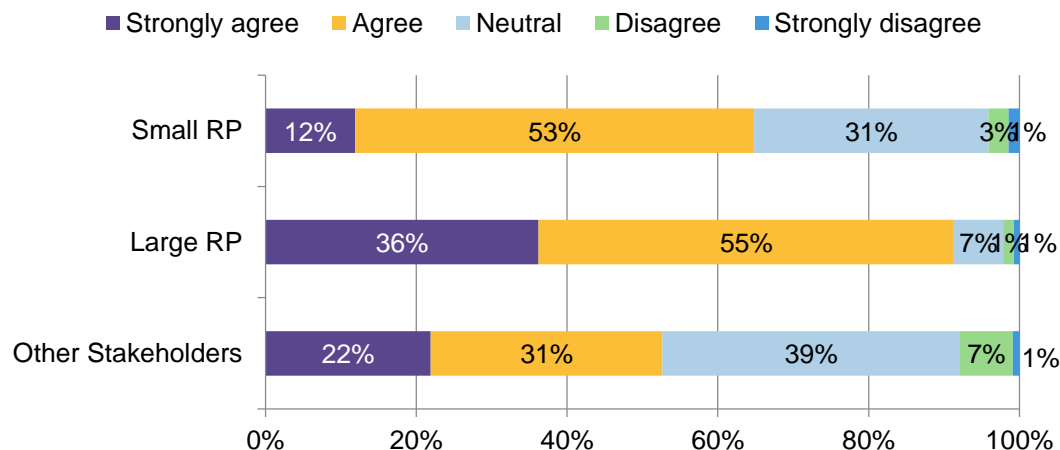
- our approach to regulation is
- (a) risk-based and assurance-based
- this approach is reflected in
- (b) your experience of being a regulated RP or how you understand RPs are regulated

- Overall 72% of respondents agree, with 74% of respondents agreeing with (a)
- Overall 4% disagreed with these statements
- 91% of large RPs agree overall with the statements

**Q8 responses by sub question**



**Q8 by stakeholder type**



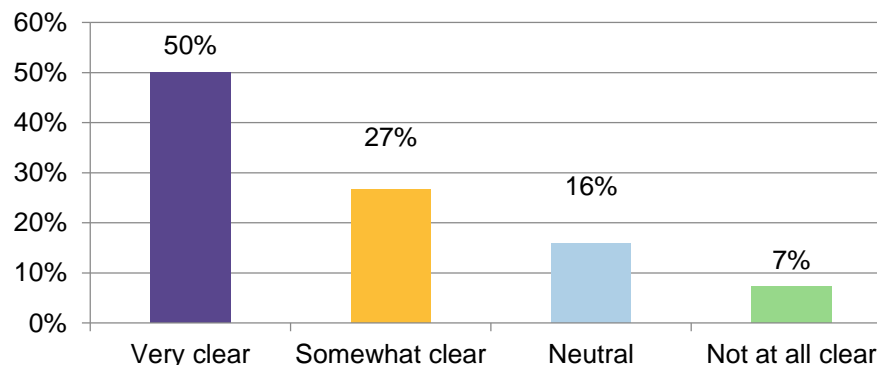
## Section 3: Delivery and practice (Q9)

### Q9

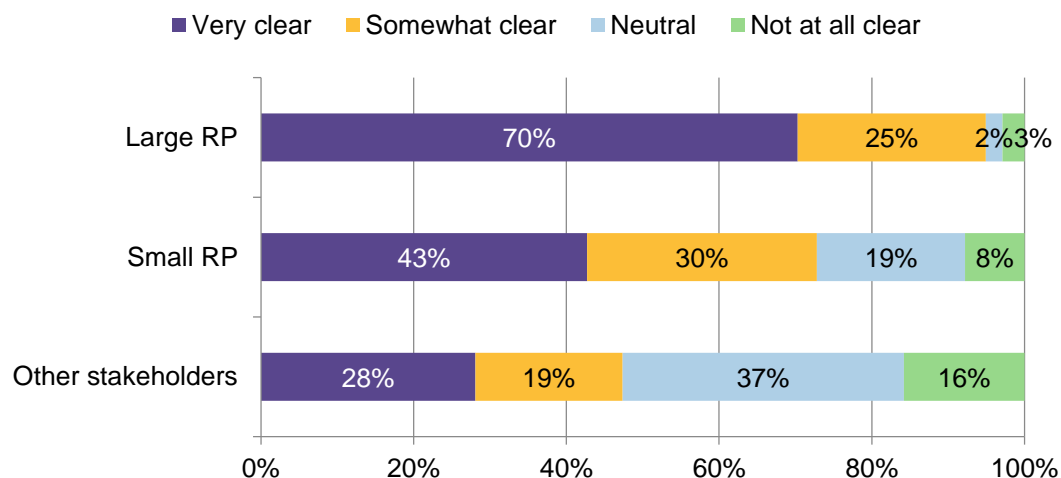
How clear are you about any information and/or evidence you are asked to provide by the regulator and why?

- 77% of respondents (and 95% of large RPs) answered positively, while 7% were not clear
- A smaller proportion of other stakeholders answered positively; however this may be explained by them receiving fewer requests for information or evidence

### Q9 responses



### Q9 by stakeholder type

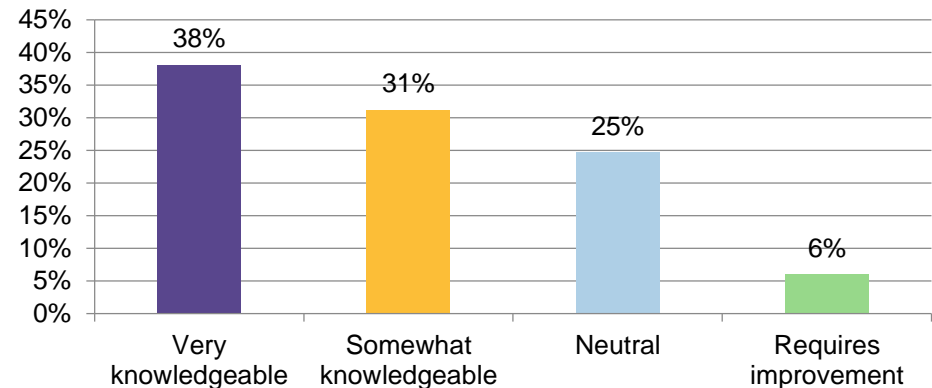


# Section 3: Delivery and practice (Q10)

## Q10

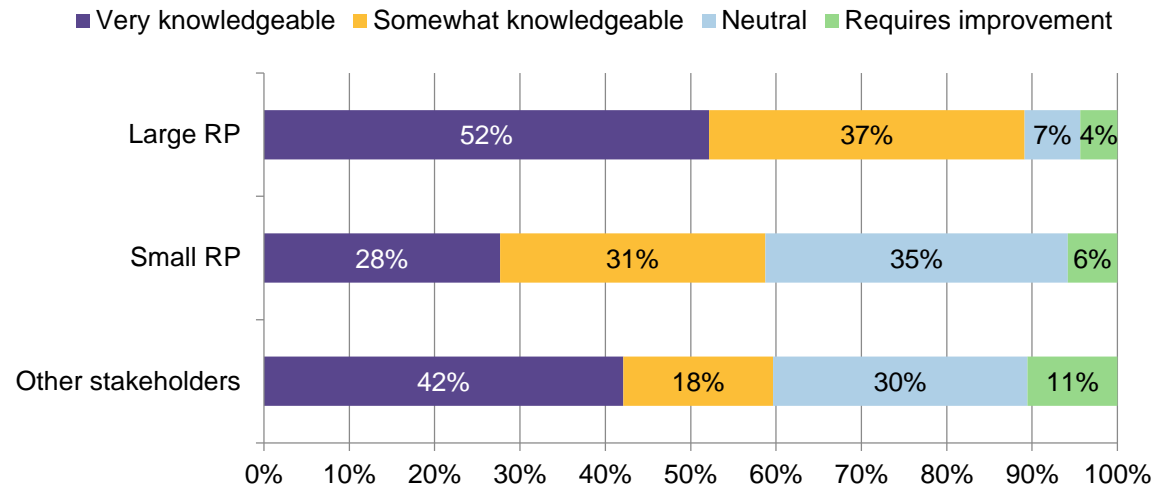
From engaging with our regulatory staff, how knowledgeable are they about the nature and complexity of the sector?

## Q10 responses



- 69% of respondents answered positively, while 6% answered negatively
- 89% of large providers answered positively

## Q10 by stakeholder type

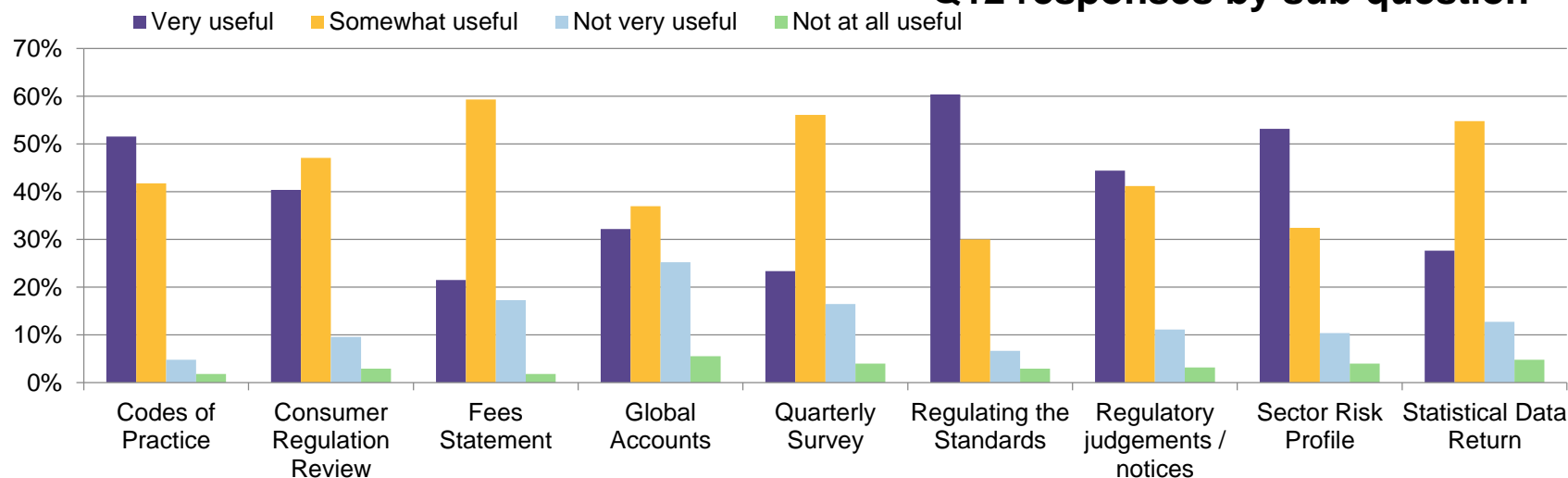


## Section 4: The regulator (Q12)

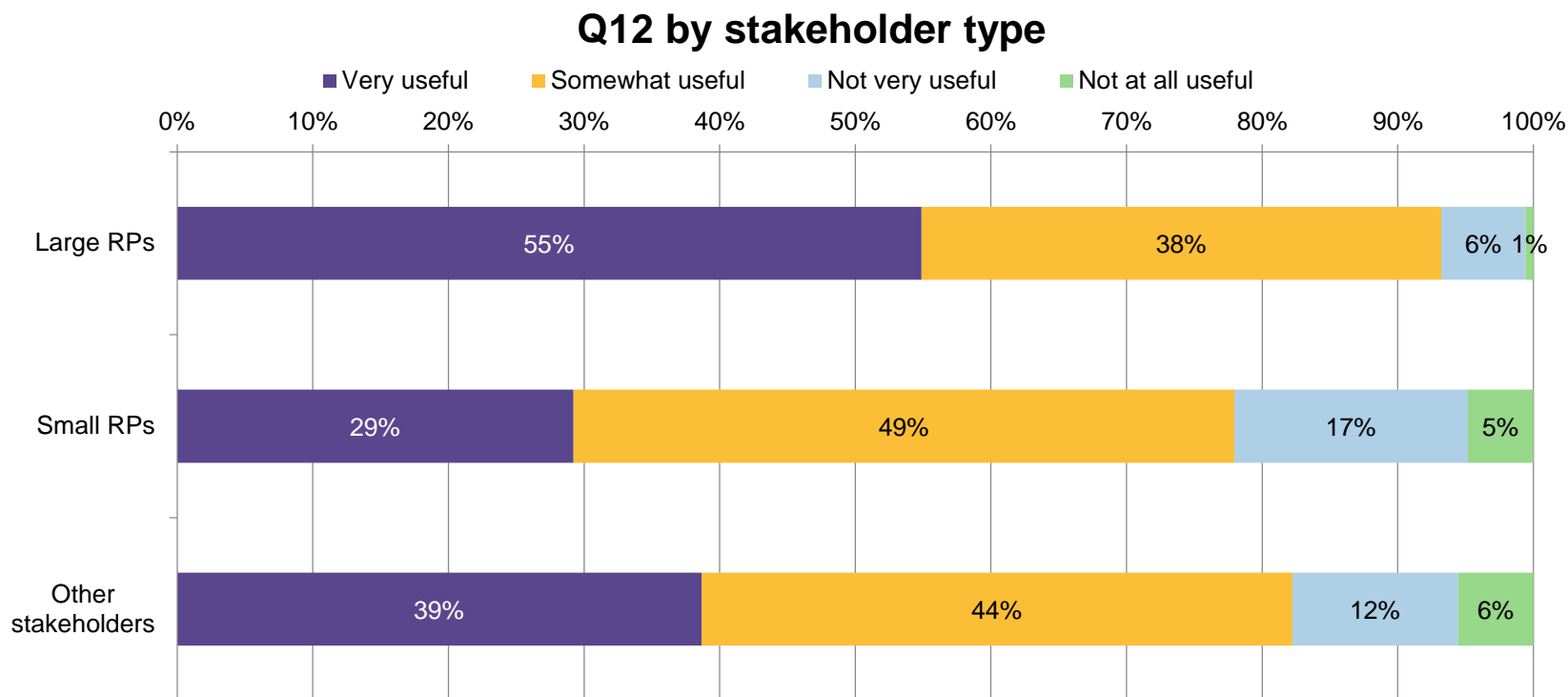
Q12: Please indicate how useful you find the following publications:	All useful
Codes of Practice	93%
Consumer Regulation Review	88%
Fees Statement	81%
Global Accounts	69%
Quarterly Survey	80%
Regulating the Standards	90%
Regulatory judgements / notices	86%
Sector Risk Profile	86%
Statistical Data Return	82%

- Overall, 84% of respondents find the range of regulator's publications very or somewhat useful
- The Codes of Practice and Regulating the Standards were rated as very or somewhat useful by at least 90%
- 69% find Global Accounts and 80% find Quarterly Survey useful – these cover large providers only (which account for a majority of the sector's financing). These publications are therefore principally targeted at these providers and their lenders, rather than the sector as a whole.

### Q12 responses by sub-question



## Section 4: The regulator (Q12)



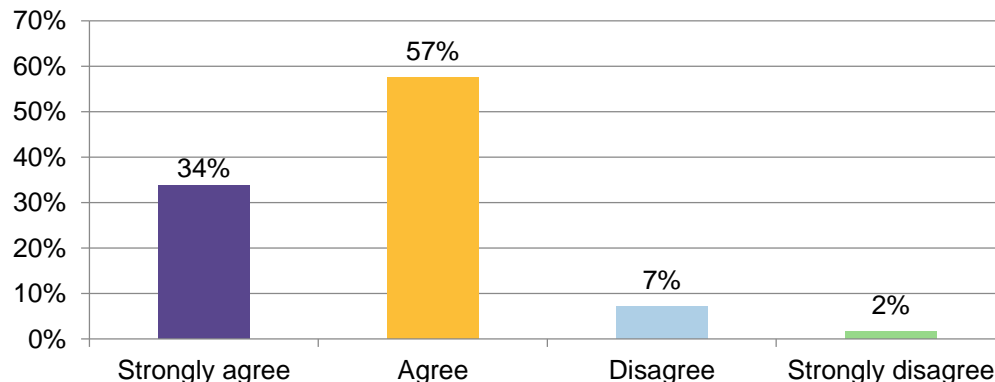
- As in 2018, large providers are most likely to find the regulator's publications very useful (55%) and very useful or somewhat useful (93%)
- 83% of other stakeholders and 78% of small RPs also find the publications useful
- 1 in 20 small providers and 1 in 17 other stakeholders do not find the regulator's publications useful

## Section 4: The regulator (Q13)

### Q13

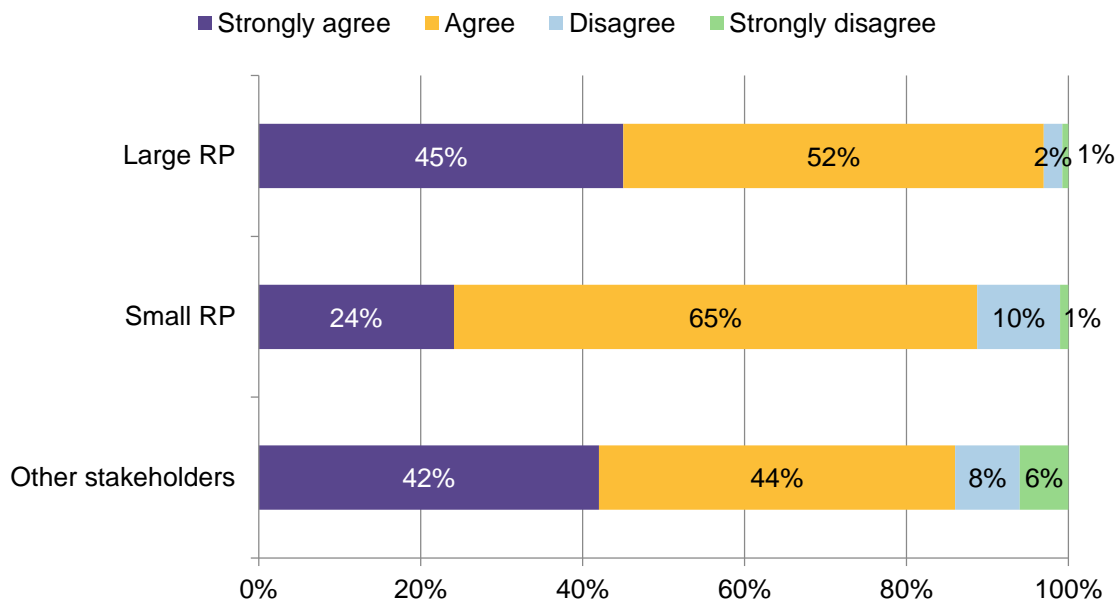
To what extent do you agree that the Regulator takes action where possible to ensure that confidence in the sector is maintained, and access to finance on competitive terms continues?

### Q13 responses



- 91% of respondents agree with this statement
- 97% of large RPs agreed with this statement (a 4% increase from 2018), with 89% of small RPs and 86% of other stakeholders also agreed

### Q13 by stakeholder type



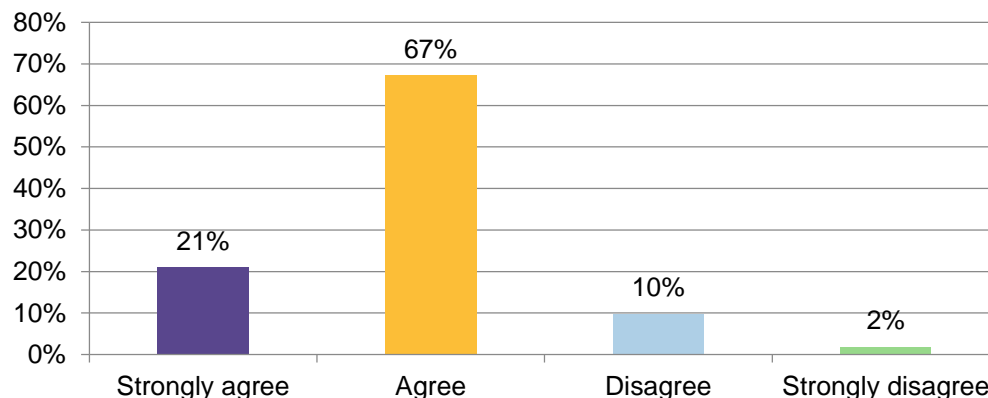
## Section 4: The regulator (Q14)

### Q14

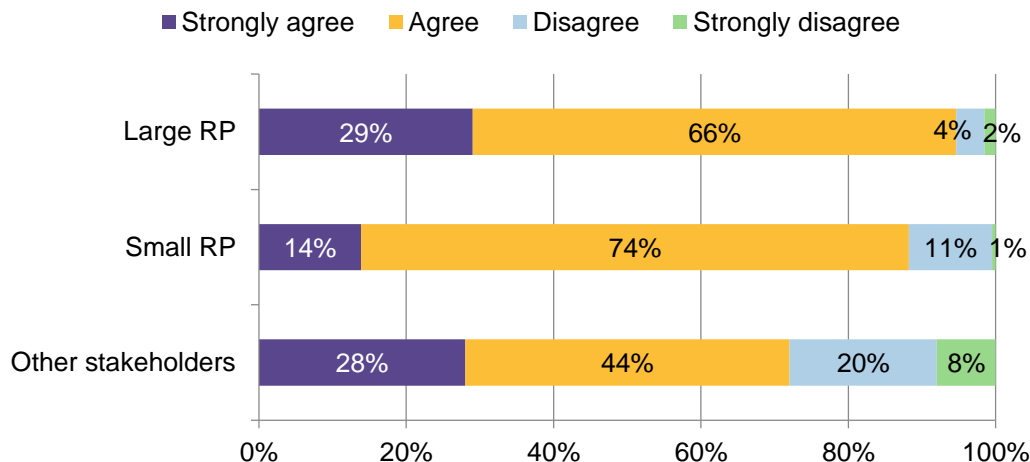
To what extent do you agree that the Regulator takes appropriate action in response to referrals where the Regulator finds consumer standards have been breached and tenants, or potential tenants, have been at significant risk of serious detriment?

- This is a new question in the 2019 survey
- 88% of respondents agreed, with 67% agreeing and 21% strongly agreeing
- 96% of large RPs agree with this question, with 88% of small RPs and 72% of other stakeholders agreeing

Q14 responses



Q14 by stakeholder type

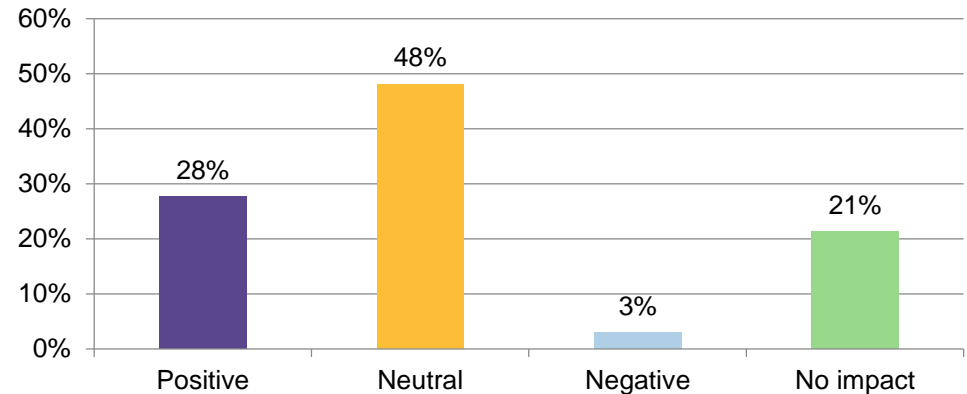


# Section 4: The regulator (Q15)

## Q15

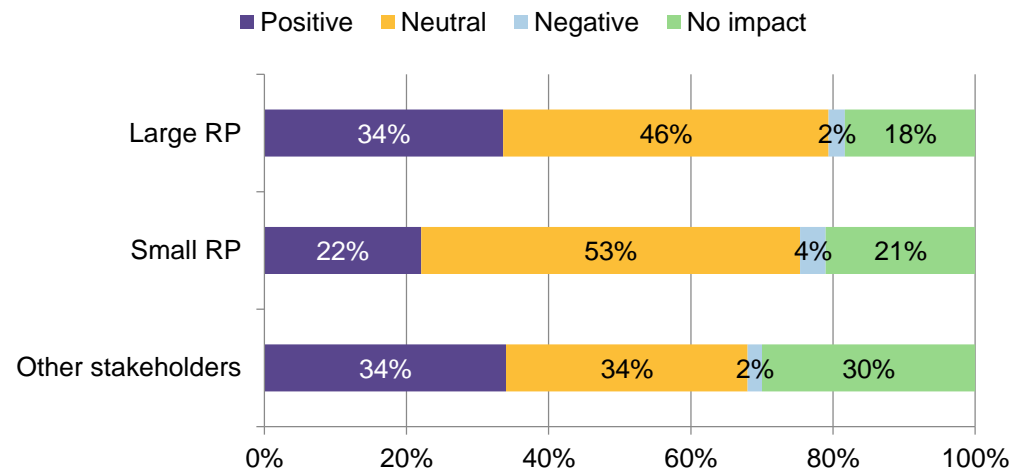
The Regulator of Social Housing became a standalone body on 1 October 2018. Do you think this change has had a positive or negative impact on effective regulation of the sector?

## Q15 responses



- 28% stated the impact was positive and only 3% considered the change to be negative
- 48% of respondents feel the change has had a neutral impact, with 21% stating it has had no impact
- Large RPs and other stakeholders were equally positive

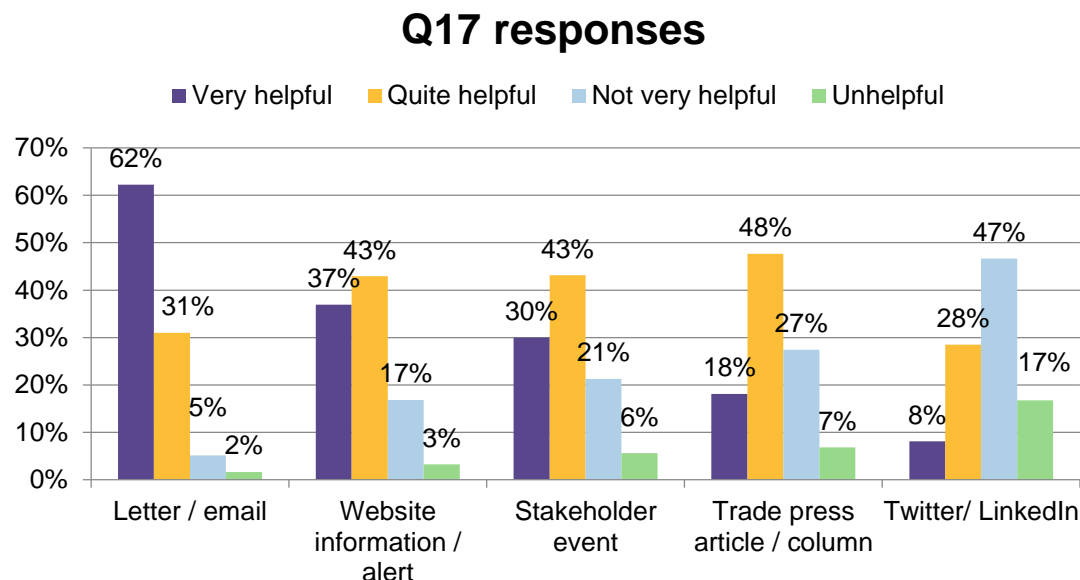
## Q15 by stakeholder type





## Section 4: The regulator (Q17)

Q17: Which of the following do you find helpful in getting information about the requirements of our standards, publications and any other news?	All positive
Letter / email	93%
Website information / alert	80%
Stakeholder event	73%
Trade press article / column	66%
Twitter/ LinkedIn	37%



- 93% of respondents find direct contact via letter or email helpful
- Although social media channels was not as popular overall, 47% of other stakeholders found this method of contact helpful, compared to 35% of providers.
- A different question was asked in 2018 so direct comparison is not possible.

# Next steps

- We aim to conduct another survey in 2020
- Some of the questions will remain the same to enable comparison
- In the meantime we will use the results of this survey to inform the Regulator of Social Housing's performance monitoring, corporate planning and regulatory engagement
- We will be conducting a separate survey of registered providers on our regulatory engagement with providers, including IDAs
- Building on the changes that we have made to the 2019 Statistical Data Return we will consider whether we can make further changes to improve the accessibility of our publications
- We have communicated the results internally and will reflect on the results in our work planning and development plans



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The Regulator of Social Housing regulates registered providers of social housing to promote a viable, efficient and well-governed social housing sector able to deliver homes that meet a range of needs.

