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Beyond TSM compliance

Turning tenant satisfaction results into board-ready improvement

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Three years into the Tenant Satisfaction Measures, most landlords have the process down. The surveys go out, the results come in, the figures reach the regulator and a summary goes to the board.

That is compliance. It is necessary, but on its own it doesn't improve anything for tenants.

The regulator has been clear that "no regulatory judgement is based solely on TSM results". What it looks for in inspections is evidence that landlords understand their tenants, act on what they hear and can show the difference it makes. Boards are expected to have that evidence and to challenge it.

This paper sets out why a compliant TSM survey is not the same as useful insight, what the national data is telling us, and a seven-step model for turning results into improvement a board can stand behind.

What the national picture tells us

The regulator's 2024/25 headline report draws on almost 500,000 tenant surveys from 360 large landlords. The headlines are steady rather than dramatic:

71.8%
median overall satisfaction among social rent tenants, up 0.5 points

35.5%
satisfied with complaint handling, the weakest result

61.6%
feel their landlord listens to their views and acts on them

47.9%
median overall satisfaction among shared owners

The strongest results were being treated fairly and with respect (77.9%) and feeling your home is safe (77.6%). Shared owners are far less satisfied across the board, with only 23.4% satisfied with complaint handling.

Three findings in the report matter more to boards than any single score.

1. Most dissatisfaction never becomes a complaint

About 26% of tenants told surveys they had complained in the past year. Landlords' own complaint records imply a figure nearer 7%. Most of what tenants experience as a complaint never reaches a formal process, so it never reaches the board's complaints report. The survey is often the only place it shows up.

2. How you ask changes what you hear

Average overall satisfaction ranged from 80.2% for postal surveys to 60.1% for online surveys, with telephone at 69.4%. The regulator found that most of the year-on-year national rise came from changes in survey method rather than better services. A board comparing its score with a neighbour's, or with last year's, needs to know whether the method changed before celebrating or worrying.

3. Context explains a lot, but not everything

Results vary by region (a median of 61.2% in London against 76.6% in the North), by size (75.0% for landlords with under 5,000 homes against 64.6% for those with over 40,000) and by the share of supported housing. The regulator still concludes that the quality of landlords' services remains the main factor explaining the differences. Context helps you understand a score. It doesn't excuse one.

Why compliance isn't differentiation

Every large landlord now has a TSM score. Most fall within a few points of each other: half of landlords sit between 64.7% and 78.9% on overall satisfaction. A score that moves a point a year, measured differently from your neighbour's, is a weak basis for a strategy and a weaker basis for board assurance.

Meanwhile, the regulator's inspections keep returning to the same themes. Landlords are graded down where they don't know enough about their tenants and homes, where tenant engagement doesn't visibly change decisions, and where boards aren't given complete, accurate information. In 2025 the regulator described "poor and incomplete data" as a recurring cause of failure. Recent judgements praise landlords that can show a clear line from what tenants said, through the executive and board, to what changed.

The TSM survey is the one time each year you speak to a representative sample of every tenant. Used only for compliance, that is a wasted opportunity.

What is changing

The bar continues to rise:

- **From 1 October 2026**, an updated Transparency, Influence and Accountability Standard, a new Competence and Conduct Standard and a revised Code of Practice come into force, alongside a new TSM direction.
- **A new measure, BS06**, covers the proportion of homes with all required electrical safety checks completed. It applies from the 2026/27 collection year.
- **Awaab's Law** is extending to more hazards, so how quickly landlords hear about, and act on, problems in tenants' homes is under closer scrutiny than ever.

Each of these increases the value of hearing directly from tenants, and of being able to prove what you did next.

A seven-step model for acting on your TSMs

1

Get the sample right

Robust insight starts with who you hear from. A response rate is not the same as a representative result.

- Set quotas or monitor responses by area, tenure, age, household type, property type and needs, and track them while fieldwork is live, not afterwards.
- Make sure shared owners and leaseholders are heard separately. Their experience and expectations are different.
- Plan for residents who are less often heard: call at different times, including evenings, offer booked appointments, provide translation and accessible formats, and use interviewers trained to recognise vulnerability.
- Weight results where needed, and record exactly how, so the board can trust year-on-year comparisons.

2

Keep your method consistent, and know its effect

Choose your method mix deliberately and keep it stable. If you must change it, run the old and new methods side by side for a period, or at least report the likely effect to the board. Telephone interviewing gives you the most control over who takes part and lets interviewers probe for detail, but whichever method you use, consistency is what makes trends meaningful.

3

Ask the questions that explain the score

The twelve TSM perception questions tell you *what* tenants think, not *why*. A few well-chosen additional questions make the difference: ease of contact, getting things right first time, being kept updated during a repair, and whether the tenant would speak highly of their landlord. Keep the interview to around 10 to 15 minutes to protect response quality.

4

Find the drivers

Key driver analysis shows which aspects of service have the strongest link to overall satisfaction and trust. It is often not the measure with the lowest score. In many landlords, communication and being kept informed matter more to overall satisfaction than the repair itself. Driver analysis stops a landlord spending money on the most visible problem when the most influential one is elsewhere.

5

Read what tenants actually said

The open-text comments are the most underused part of most TSM surveys. Every "why did you give that score?" answer is a tenant explaining, in their own words, what would make the difference. Modern text analytics, including AI-assisted theme and sentiment coding, make it practical to analyse thousands of comments by theme, area and tenant group. A human should still check the output and pick the quotes that bring a board paper to life.

6

Connect perception to what happened

The TSM tells you how tenants feel across the year. Transactional surveys, carried out shortly after a repair, a complaint, a new letting or an anti-social behaviour case, tell you which moments shaped that feeling. Combined with your own operational data, they show *where* satisfaction is won and lost, and which teams can act on it. They also give you early warning months before the next annual survey.

The same conversations can surface safeguarding concerns and property hazards that have never been reported. With VIRA, our Voice-Informed Risk Alerts service included in all our social housing research, every welfare concern and Awaab's Law hazard reaches the right team in real time, with a full record of what happened next.

7

Build a board-ready plan, and close the loop

The output of all this should be a short, prioritised plan, not a long report. It should be built around three to five key strategic findings, each tied to evidence from the survey. For larger landlords the detailed recommendations underneath will go further, by area, service or tenant group, but they should still roll up to those few findings so the board can see the wood for the trees.

- A named owner, actions and a measure for each finding.
- Clear notes on method, sample and any caveats, so the board can judge how much weight to place on the results.
- A commitment to tell tenants what you heard and what you are doing about it, and to report progress.

Then measure again. Transactional surveys and quarterly tracking let the board see whether the plan is working well before the next TSM year.

In practice: Folkestone & Hythe District Council

Folkestone & Hythe District Council manages around 3,300 homes. In 2025 we invited all 3,352 tenants to take part in its TSM survey by post, with an online option and telephone interviews to make sure enough tenants responded for robust results. In total, 692 tenants responded.

The council had weekly updates during fieldwork and a live dashboard from day one, with filters by tenant and property characteristics, benchmarks and AI analysis of comments. Overall satisfaction (TP01) reached **76.4%, up 6.9 points** on the previous year.

More importantly, the council used the results. It published an action plan for tenants, shared it with every internal team involved, and presented the findings to its core tenant meetings and to leadership and cabinet. The results showed tenants wanted more say on day-to-day operational matters, so the council created a new Neighbourhood Services and Communications group to give them that voice.

That is the difference between compliance and improvement: a clear line from what tenants said to what changed.

Questions every board should ask

1. **How representative were this year's responses, and who did we hear least from?**
2. **Did our survey method change, and how might that have affected the scores?**
3. **Which aspects of our service drive overall satisfaction most, and are we investing in them?**
4. **What are tenants telling us in their comments that our performance figures don't show?**
5. **How do our TSM results connect with what tenants tell us after a repair, a complaint or an anti-social behaviour case?**
6. **What did we change last year because of what tenants told us, and how do we know it worked?**
7. **How have we told tenants what we heard and what we are doing?**

Conclusion

The TSMs were never meant to be the finish line. They give every landlord a common baseline, and the regulator, tenants and boards now expect more: evidence that landlords understand their tenants, act on what they hear and can prove the difference.

Landlords that treat the annual survey as a source of insight, not a compliance task, will be better placed for inspection, better able to target investment and, most importantly, better at delivering the service tenants want.

Sources

- Regulator of Social Housing, Tenant Satisfaction Measures 2024/25 headline report
- Regulator of Social Housing, Regulatory Casework Review 2025
- Regulator of Social Housing, Tenant Satisfaction Measures Direction (June 2026)
- National Housing Federation, Tenant Satisfaction Measures: key insights

Get more from your TSMs

We'll review your last results, sample and methods, and show you what a better year could look like.

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