



## HouseMark STAR features

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Designed and delivered by HouseMark. The leading data-driven solutions provider to the UK housing sector

## Acknowledgements

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<sup>1</sup> Believe Housing, CHS Group, Community Housing Group, Derby Homes, emh group, Great Places Housing Group, Greatwell Homes, Hastoe Housing Association, Housing Plus, Islington and Shoreditch Housing Association, L&Q, Lewisham Homes, Longhurst Group, Muir Group, Optivo, Peabody, Poole Housing Partnership, Progress Group, Radcliffe Housing Society, Radian Group, Sheffield City Council, Shian Housing Association, South Devon Rural Housing, Sovereign, The Wrekin Housing Group, Torus, Tower Hamlets Homes, Town and Country Housing, Wandle, Watford Community Housing Trust, WDH, West Lancashire BC, whg.

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## 1. About this document

This 'HouseMark STAR features' document is one of a series of free publications available on our website. It contains the full list of features and requirements that make up a valid HouseMark STAR survey and is essential reading for anyone who commissions or runs their own surveys. It has been updated in line with the wholesale review of STAR carried out in 2019/20.

This document is aimed at social landlords operating in England, Northern Ireland and Wales<sup>2</sup>, where the use of HouseMark STAR is voluntary. In Scotland there is a regulatory requirement to carry out surveys of tenants and service users that is based on STAR but with some differences. A note on Scotland is included at the end of this document.

Other documents relating to HouseMark STAR are available at [www.housemark.co.uk](http://www.housemark.co.uk) and include:

- **HouseMark STAR question library**  
Full listing of core, recommended and optional satisfaction questions and the suggested demographic questions, grouped according to theme. This is a useful resource in deciding which questions should make up HouseMark STAR surveys to suit your needs.
- **A guide to running perception surveys**  
A detailed guide on how to run a HouseMark STAR perception survey which covers questionnaire design, selecting representative samples, checking returns are representative, different survey methods and more. This is useful reading for anyone commissioning or running a perception survey.
- **A guide to running transactional surveys**  
A detailed guide on how to run HouseMark STAR transactional surveys which covers the different types of transactional surveys and survey methods, how to design your questionnaires and more. This is useful reading for anyone commissioning or running one or more transactional surveys.

We also make available on our website:

- **HouseMark STAR logos**  
This contains logos in various graphical formats which you are free to add to your questionnaires, reports and related documents.
- **STAR review summary**  
This report summaries the recent consultation exercise for STAR in 2019/20 and provides background information on why particular decisions were made as a result of the consultation.

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<sup>2</sup> Additional optional questions for Wales are available in the STAR questions library. These were agreed with the Welsh government in 2011 but are currently voluntary.

## 2. The history of STAR

In 2011 HouseMark launched a successful, voluntary approach to tenant and resident<sup>3</sup> satisfaction measurement for the social housing sector. The approach was essential in providing social housing providers<sup>4</sup> with the means of comparing key satisfaction results – both benchmarking with others and trends over time. The development of the STAR framework was widely consulted on and is available for any social housing provider to follow.

As a voluntary framework<sup>5</sup>, HouseMark STAR is designed to be flexible and recognises differences of opinion and practice in certain areas. We continue to be encouraged by the positive feedback from social housing providers and the numbers that have taken up of STAR as a sector benchmarking tool.

STAR continues to be an invaluable resource for landlords assisting in understanding how tenants and leaseholders feel about the services and informing strategic decision-making.

The STAR framework has undergone two reviews since 2011 (2014/15 and 2019/20).

### Early review of STAR

The earlier review (2014/15) provided the ability to assess the success of the framework and led to the introduction and benchmarking of transactional surveys (StarT) alongside the established perception survey (STAR). Our benchmarking services from April 2016 included transactional customer satisfaction measures for repairs, lettings, ASB and complaints.

### Latest review of STAR

HouseMark's STAR remains the prevailing method of understanding customer satisfaction used in the social housing sector. The framework continues to successfully deliver data-driven insights resulting in measurable improvements for housing providers.

However, over the last few years there have been a number of changes in survey methods used for measuring resident satisfaction reflecting:

- the growth in digital communications
- the growing use of satisfaction questions from other sectors
- an appetite for real-time customer feedback

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3 We use the terms tenant and resident throughout the STAR publications as surveys can apply to tenants of rented properties (typically, general needs, housing for older people and supported housing) and home-owning residents of leasehold and shared ownership properties.

4 We use the term social housing providers throughout the STAR publications to describe social housing landlords and their managing agents. This term emphasises that where ownership and management are split between different organisations, it is usually the manager (i.e. the provider) of the housing service who organises surveys of the tenants and residents.

5 In 2015 STAR became a regulatory requirement in Scotland but remains voluntary best practice in England, Northern Ireland and Wales.

- and a desire to use the latest analytical tools to understand satisfaction

The 2018 Social Housing Green Paper in England signalled a new emphasis on consumer standards in the sector and it is important to recognise that while social tenants have less opportunity to switch providers this should not be used as an excuse for poor customer experience and the framework provides tenants and residents the opportunity to have their say.

Motivated to maintain a modern approach to capturing customer satisfaction data and ensure residents voices are heard, HouseMark reviewed the STAR framework to ensure that it continues to provide social housing landlords with the best possible insights to deliver and demonstrate an excellent customer experience.

The latest review was the most extensive piece of research of its kind and involved several consultation stages. The review was overseen by a wide range of sector representatives on our steering group, including the National Housing Federation (NHF), the Chartered Institute of Housing (CIH), tpas, the National Federation of ALMOs (NFA), Association of Retained Council Housing (ARCH), Taroe Trust, and Councils with ALMOs Group (CWAG). Further input from a Welsh perspective was received from Community Housing Cymru (CHC), Tpas Cymru and the Welsh Local Government Association (LGA).

As a first step, HouseMark invited social landlords and sector specialists to complete a survey to share how they currently collect customer feedback and what they do with this data. Over 250 landlords responded, reaching all types of social housing provider – from big to small, ALMOs to associations. These landlords represent close to four million social housing units and the majority of the sector in England and Wales<sup>6</sup>. We also consulted tenants and leaseholders, and over 8,000 people responded to an online survey collecting their views on what matters to them, how they like to be surveyed and what improvements to the framework they would like to see. This forms one of the largest resident consultation activities in recent years and provided invaluable insight to help shape the new framework.

The results from the consultation were then analysed and used to inform discussions around the country. Over 150 landlords attended one of six regional events organised by HouseMark. In parallel, over 150 engaged residents from over 40 landlords attended one of six regional events hosted by Tpas.

The initial findings were presented at HouseMark's Data Summit in October before the final stage of consultation. A set of proposals were published in November 2019 and landlords were invited to provide feedback via two online surveys.

The new framework was also tested with residents throughout December 2019, with over 5,000 tenants and leaseholders from 20 landlords taking part.

More details about the consultation can be found in the STAR review summary report available on our website.

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<sup>6</sup> The 2019 review did not cover Scotland, where STAR already exists as a regulatory framework.

### 3. Why should landlords use the new HouseMark STAR?

The new STAR framework has been designed to provide landlords with questions that are resident-focussed and draw out the insight they need to drive real improvements.

The top five reasons why social housing providers should use the STAR framework are:

1. **This is the only solution for capturing customer feedback that has been co-created with the sector** – with unrivalled levels of consultation throughout – over 300 landlords and 13,000 customers helped shape the framework. By using it, landlords are capturing feedback in line with best practice and resident views.
2. **To ensure consistency with the rest of the sector – allowing providers to compare (given their context) with other landlords and outside of sector<sup>7</sup>.** Comparison allows landlords to identify how they are performing in context and where they may choose to prioritise investment and action.
3. **To get meaningful intelligence on their customer experience** – the STAR framework exists within the context of a range of ways to gather customer feedback. Some alternative methods can provide headline satisfaction figures that do not accurately reflect the resident experience. By following the STAR methodology, landlords can have confidence in their results and use them to drive real improvement.
4. **To share results that residents can trust** – by following a consistent framework that is built with the resident in mind and independently validated demonstrates a commitment to listening to customers and acting upon their feedback – which in turns builds trust.
5. **To be ahead of the curve for changes to consumer metrics, going beyond headline figures to drive performance improvements.** We don't know exactly when the Social Housing White Paper for England will be published or what it will mean for consumer regulation, but by adopting this voluntary framework providers will get a better understanding of their performance and demonstrate their commitment to customer satisfaction. The framework offers the flexibility to respond to emerging policy throughout the UK.

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<sup>7</sup> Only some of the questions in the new framework are comparable with other sectors, others are specific to housing.

## 4. The questions

### 4.1 The three tiers

A key feature of the new HouseMark STAR framework is the standardised question set.

The questions included in the framework have been shaped and tested by over 13,000 tenants and leaseholders and 300 landlords and represent the best combination of standardised questions to get a holistic view of a landlord's services and maximise insight.

The new framework contains three tiers of questions:

Tier	Number of questions	Instructions on use	Benchmarking with HouseMark
Core	5	Must be included	Yes
Recommended	15	Recommended for inclusion subject to survey method and questionnaire length	Yes
Optional	250	For inspiration when selecting additional measures to suit your organisation	No

### 4.2 Perception or transactional

The new STAR framework includes questions for both perception and transactional surveys.

A perception survey measures customers' views, impressions and opinions about their landlord and the services it delivers. Perception surveys can be carried out at specific points in time, for example every one or two years, or as a tracking survey which means running the same survey at set intervals throughout the year, such as weekly, monthly or quarterly. The key feature that makes a survey a perception survey is that respondents should be chosen at random from the full list of tenants and residents, whether or not they have had a recent interaction with the landlord.

Transactional surveys collect customer feedback about an interaction or event, gathering data linked to a recent service while the interaction is still fresh in customers' minds. The survey is triggered by an event such as a responsive repair, a complaint or a letting. These surveys are an invaluable way of measuring the customer experience and views on specific services, obtaining feedback very quickly after the event.

The distinction between the two survey types of perception and transactional is not the actual questions asked, but the trigger for distributing the survey. For one type, the



survey distribution follows an interaction or an event (transactional) whereas the other type (perception) does not.

Both methods can provide valuable insight, but the two can not be compared. When asking a question via transactional survey, satisfaction is between 10% and 15% higher than if the same question is asked in a perception survey. Confusion between the two methods has in the past been the single biggest source of distrust in figures reported by landlords. The new framework therefore makes a clear distinction between questions that are perception questions, and those that are transactional. Landlords wishing to compare will need to ensure they have followed the correct STAR methodology for the metric in question.

### 4.3 Core questions

The below table details the five core STAR questions that must be asked for surveys to be STAR compliant.

Four of the core questions should be collected from a perception survey asking residents for their views, similar to previous STAR surveys. The remaining question on responsive repairs should be collected as part of ongoing research using transactional surveys carried out following the completion of a responsive repair. If a provider does not conduct an ongoing transactional repairs survey, an alternative is provided for inclusion in perception surveys.

**Table 1: The five core questions**

Question	Source	Alternative source	Alternative question
Taking everything into account, how satisfied or dissatisfied are you with the service provided by [your social housing provider]?	Perception		
How satisfied or dissatisfied are you with the overall quality of your home?	Perception		
Thinking specifically about the building you live in, how satisfied or dissatisfied are you that [your social housing provider] provides a home that is safe and secure?	Perception		
How satisfied or dissatisfied are you that [your social housing provider] is easy to deal with?	Perception		

Overall, how satisfied or dissatisfied are you with the repairs service you received this time? <sup>8</sup>	Transactional repairs survey	Perception <sup>9</sup> alternative	Have you had any repairs carried out in the last 12 months? - If 'yes': Thinking about the LAST time you had repairs carried out, how satisfied or dissatisfied were you with the repairs service?
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Analysis from the latest review suggest that these questions form the fundamental cornerstones that need to be met for tenants and residents to be satisfied with their landlord overall. The core questions cover the three key strands of product, people and process/service.

#### 4.4 Recommended questions

As well as the core questions, the following questions are recommended for inclusion in your surveys.

The choice of whether or not to include them, and which ones you include will depend on the collection method you are using, and the size of the questionnaire. For example, for transactional surveys conducted by SMS, research shows that respondents disengage if they are asked more than four questions. However, telephone and postal surveys can be longer.

An additional and important consideration is landlords should choose to include the recommended questions that reflect their strategic priorities, reflect the services they provide and are likely to give them the insight they seek.

All recommended questions will be available for benchmarking.

**Table 2: The fifteen recommended questions**

Question	Source
How satisfied or dissatisfied are you with your neighbourhood as a place to live?	Perception
How satisfied or dissatisfied are you that your rent provides value for money?	Perception
How satisfied or dissatisfied are you that your service charges provide value for money?	Perception

<sup>8</sup> This question should only be asked following responsive repairs requested by the resident. It should not be asked following the completion of planned works of gas servicing.

<sup>9</sup> This perception alternative is recommended for all surveys, even if the landlord already collects the transactional measure.

How satisfied or dissatisfied are you that [your social housing provider] listens to residents' views and acts on them?	Perception
How satisfied or dissatisfied are you that [your social housing provider] gives you the opportunity to make your views known?	Perception
Generally, how satisfied or dissatisfied are you with the way [your social housing provider] deals with repairs and maintenance?	Perception
How likely would you be to recommend [your social housing provider] to family or friends on a scale of 0 to 10, where 0 is not at all likely and 10 is extremely likely?	Perception
How satisfied or dissatisfied are you that on this occasion [your social housing provider] was easy to deal with?	Transactional – all surveys
How satisfied or dissatisfied are you that the repair was completed right the first time?	Transactional repairs survey
Overall, how satisfied or dissatisfied are you with the way your complaint was handled by [your social housing provider]?	Transactional complaints survey
Overall, how satisfied or dissatisfied are you with the final outcome of your complaint?	Transactional complaints survey
Overall, how satisfied or dissatisfied are you with the way your anti-social behaviour complaint was handled by [your social housing provider]?	Transactional ASB survey
Overall, how satisfied or dissatisfied are you with the final outcome of your anti-social behaviour complaint?	Transactional ASB survey
Overall, how satisfied or dissatisfied are you with the lettings process?	Transactional lettings survey
Overall, how satisfied or dissatisfied are you with how your call was handled by [your social housing provider]?	Transactional contact centre survey

The full rationale for selecting these questions as the core and recommended questions is available in our HouseMark STAR review summary publication.

## 4.5 Question order

The framework does not prescribe an order for asking questions, which can be interspersed with bespoke or optional questions depending on the survey type and collection method, as the landlord sees fit. However, best practice on question ordering is available in a guide to running perception surveys and a guide to running transactional surveys, both on the HouseMark website.

## 5. Valid response scales

For all the core satisfaction questions and most of the recommended and optional satisfaction questions, a five or ten-point response scale should be used. The response scale used should be appropriate to the question.

The standard verbal response options are:

- Very satisfied; Fairly satisfied; Neither satisfied nor dissatisfied; Fairly dissatisfied; Very dissatisfied

An alternative verbal response option is:

- Agree strongly; Agree; Neither agree nor disagree; Disagree; Disagree strongly

If you are using one of these verbal response scales, in order for your survey to be HouseMark STAR compliant, the middle or 'neither' option must be included.

For landlords who do not wish to use a verbal scale, a numeric five or ten-point scale is also allowed. In this instance the prefix for the question should change as follows:

- On a scale of one to five, where one is very dissatisfied and five is very satisfied, how satisfied are you that...
- On a scale of one to ten, where one is very dissatisfied and ten is very satisfied, how satisfied are you that...

This lengthy prefix does not need to be asked before each question. Depending on the collection method used, pragmatic solutions like the one shown below are recommended:

On a scale of 1-10, how satisfied are you with the following:										
	Very Dissatisfied					Very Satisfied				
	1	2	3	4	5	6	7	8	9	10
The overall quality of your home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
[Your landlord] gives you the opportunity to make your views known	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
That [your landlord] is easy to deal with	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your neighbourhood as a place to live	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The exception to the five or ten-point response scale rule is the recommended question used to calculate Net Promoter Score (How likely would you be to recommend [your social housing provider] to family or friends on a scale of 0 to 10, where 0 is not at all likely and 10 is extremely likely?). This should always use an 11-point numeric response scale (0-10). This is to ensure it uses the standardised cross-sector response scale that enables like-for-like comparisons with other sectors.

## 6. Valid response options

The following response options are permissible in a valid HouseMark STAR survey:

- Verbal. i.e. Very satisfied; Fairly satisfied; Neither satisfied nor dissatisfied; Fairly dissatisfied; Very dissatisfied. Or alternatively: Agree strongly; Agree; Neither agree nor disagree; Disagree; Disagree strongly.
- Numeric. i.e. 1-5 or 1-10.
- Emojis 😊
- Star ratings ★

Emojis and Star ratings often work better for online surveys. However, where used the scale should be five point and must be clearly labelled to ensure there is no confusion.

These response options are valid for all questions, with the exception of the recommended question used to calculate Net Promoter Score. This should always use an 11-point numeric response scale (0-10).

## 7. Representative sample surveys

### 7.1 Perception surveys

For perception surveys, it is not always feasible for social housing providers to survey all tenant and resident opinion (i.e. carry out a census). Sampling will have to be carried out in the majority of cases. For all perception surveys, samples need to be representative and achieve the required confidence levels as detailed in the table below:

**Table 3: Perception survey - margins of error (at 95 per cent confidence level)**

Population size	Required margin of error	Required responses
0 – 1,000	+ / - 5 per cent	Up to 278
1,000 – 10,000	+ / - 4 per cent	375 - 566
10,000 and above	+ / - 3 per cent	Over 964

Calculating the number of responses needed to meet these confidence levels is complicated and although the above table provides a broad indication based on population brackets, social housing providers need to calculate the exact number based on their population size. Use of an online sample size calculator is recommended.

It is also important your sample is representative of the full resident population, particularly for self-selection surveys like postal and online. Once the survey fieldwork is complete, checks need to be carried out to ensure the distribution of responses is representative of the survey population as a whole. For example, checking by number of bedrooms in the property is a good test because all providers should have this information and it is a useful proxy for family size. Where bias has been introduced through different response rates for different sub-groups, then either extra surveys should be conducted for the under-represented sub-groups (booster samples) or weighting should be applied to help correct the bias. Weighting is the application of correction factors to make the received responses representative of the whole survey population. Suggested processes for applying weighting are described in a guide to running perception surveys.

One of the advantages of telephone and face-to-face interviews for surveys that cover a large number of interactions is that quotas can be set to ensure that the results of the survey represent the views of all services users. If conducted successfully there is no need to check that the response is representative or weight the results.

It is important that sampling and checking for representative responses is carried out for your surveys, as this is a key criterion that will be validated when HouseMark members submit their core HouseMark STAR results for benchmarking. Those social housing providers wishing to conduct their surveys in-house that do not have any internal statistical expertise may need to invest in some sampling advice from a market research company or a statistician in order to ensure their sample is representative. There are a number of organisations providing this type of service and support to the sector, including HouseMark. For a discussion on this with HouseMark, contact [consultancy@housemark.co.uk](mailto:consultancy@housemark.co.uk) or 024 7647 2703.

## 7.2 Transactional surveys

For transactional surveys, the annual number of survey responses a landlord can achieve will depend on the number of interactions (or transactions) which will vary based on both the size of the landlord and the type of survey (e.g. repair, complaint).

For some transactional surveys which cover services with a relatively low number of interactions (for example, complaints, ASB and lettings), it is recommended all participants in the transaction are given the opportunity to respond, which will ensure the sample size is as robust as possible. For example, with a transactional complaints survey, all complainants should be given the opportunity to provide feedback, regardless of the nature of the complaint and whether or not it was upheld.

For landlords with a significant number of transactions of a certain type (e.g. repairs) where it is not practicable to survey every interaction, a sample of transactions will suffice. However, that sample must be chosen completely at random and in no way selected on the basis of the outcome of the transaction or any feature relating to the products, people or processes involved.

For benchmarking purposes, the table below details the number of responses required.

**Table 4: Transactional survey - margins of error (at 95 per cent confidence level)**

Number of transactions	Required minimum margin of error (annual)	Required number of annual responses	Percentage of users
Under 100	±10%	49	49% +
100 to 199	±10%	49 to 65	49% to 33%
200 to 499	±8%	86 to 116	43% to 23%
500 to 999	±6%	174 to 211	35% to 21%
1,000 to 2,999	±6%	211 to 245	21% to 8%
3,000 to 4,999	±5%	341 to 357	11% to 7%
5,000 to 9,999	±4%	536 to 566	11% to 6%
10,000 to 14,999	±4%	566 to 577	6% to 4%
15,000 to 19,999	±4%	577 to 583	4% to 3%
20,000 to 49,999	±3%	1,013 to 1,045	5% to 2%
50,000 to 99,999	±3%	1,045 to 1,056	2% to 1%
Over 100,000	±3%	Over 1,056	Approx. 1%

More information can be found in a guide to running transactional surveys available on the HouseMark website.

## 8. Which stock types to survey

Social housing providers manage a variety of types of housing stock (e.g. general needs rented, housing for older people, supported housing, leaseholder, shared ownership). We have designed the core and demographic questions so that they can be applied in surveys of any stock type. All but one of the recommended questions also apply to any stock type, but the question 'How satisfied or dissatisfied are you that your rent provides value for money?' should not be asked of leaseholders. Most of the optional questions are also applicable to any stock type, but some optional questions aimed at specific unit types are also proposed (e.g. questions about alarm call systems to tenants of housing for older people). The HouseMark STAR question library indicates the relevant stock type for each individual question.

Different stock types can report significantly different levels of satisfaction. It is therefore important for landlords to be able to split the responses by stock type to aid their analysis.

HouseMark benchmarking will allow all core and recommended questions<sup>10</sup> to be benchmarked separately for the following stock types (assuming required samples have been achieved):

- General needs rented
- Housing for older people
- Supported housing
- Leaseholder
- Shared ownership
- Market rented

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<sup>10</sup> With the exception of the VFM for rent question which is not applicable to leaseholders



## 9. Permitted collection methods

As long as the requirements for a statistically robust and representative survey are met, HouseMark STAR perception surveys can be conducted by post, telephone, online (or an online survey link embedded in SMS/text), face-to-face or a combination of those methods.

Transactional surveys can use any of the collection methods used for perception surveys, but in addition may also use SMS/text surveys and Telephone IVR.

We recognise that some social housing providers will select a single method, perhaps with 'top-ups' of an alternative method appropriate for certain hard-to-reach groups, while others may use a combination of collection methods. Online surveys are now permitted as a primary method for any survey; however, we urge that for perception surveys checks are undertaken to avoid any significant response bias (i.e. where the respondents are not representative of the whole tenant and resident population). We would also recommend that similar checks are undertaken for transactional surveys using SMS/text or online survey methods.

We have adopted this flexible position for a number of reasons:

- There are advantages and disadvantages to each of the available collection methods, and providers should be able to choose which method best meets their business needs and the needs of their tenants and residents. Furthermore, there is no firm evidence either way on whether postal self-completion and telephone interviews (the two main survey methods used by providers for perception surveys) produce significantly different results for identical satisfaction questions.
- The recent consultation with the sector found that more perception surveys are now conducted by telephone rather than using a postal self-completion approach, telephone surveys are also the most popular method for transactional surveys, although an increasing number of providers also offer online and SMS/Text surveys.
- Our consultation with tenants and leaseholders showed a preference to be surveyed in a way that suits them, which can differ for certain demographics.
- We wish to maximise the inclusiveness of HouseMark STAR surveys, the number of participating providers, and the availability of comparative performance by limiting the exclusion of data on the grounds of the collection method used.

We accommodate this flexibility in collection methods within our benchmarking services by requiring providers to identify the method or combination of methods used when submitting data to HouseMark, by flagging the methods used in our output results and, in our STAR benchmarking service, by providing an option to filter results by survey method. This means providers have the ability to compare like-for-like methods only if they so choose or to compare across the pooled methods.

Providers may need to flex the collection method to incorporate the needs of certain groups of tenants and residents (e.g. those whose first language is not English) who may need greater levels of assistance in completing a survey. Others may choose different methods for different tenure types (e.g. postal for general needs tenants, face-to-face for supported tenants, telephone for leaseholders or shared owners).

All of this comes with two important caveats. Firstly, in sample surveys, whatever method is used the samples need to be randomly selected for the perception questions and should be representative of the resident population or survey population (annual number of services users in a year) as a whole (see section 7). Secondly, the prescribed wording of the HouseMark STAR survey questions needs to be adhered to whichever method is used if it is to be included within HouseMark's benchmarking data (see section 4).

### **A note on online and SMS/Text surveys**

The use of these surveys has increased considerably over the last ten years and we ask providers to consider carefully the potential implications for online and SMS/Text surveys. It is important to recognise that any survey method carries its own bias – not just in how individual questions are answered but also in terms of how different demographic groups respond to different methodologies.

Online and SMS/Text surveys will have their own survey bias as the type of resident who completes a survey on the internet may differ from the overall survey population. These surveys carry a sampling bias as not all residents have a smart phone, participate in social media or use the internet. Online web-based surveys are often used as part of a multi-channel approach to surveying. If the results from an online survey are added to those collected using a different method, the characteristics of the two populations need to be compared and, if required, weighting applied to correct any under- or over-representation.

Another key consideration when carrying out an online survey is that response rates are likely to be lower than for other collection methods and achieving the required sample more difficult.

### **Taking a digital first approach**

Outside the housing sector many commercial companies are moving to a digital first approach, where surveys are designed to be undertaken using a digital platform and survey questions are deliberately kept short to fit on a digital screen. The HouseMark STAR framework permits digital surveys but the question wording cannot be altered if the survey is to be compliant for benchmarking.

## 10. Survey frequency

STAR perception surveys can be carried out on a one-off or ongoing basis. For the purposes of HouseMark benchmarking, survey results should be no more than two year's old (or three years old if under 1,000 units).

Landlords carrying out a rolling perception survey will be able to report their figures more frequently, but the end-of-year figures must have a sufficient sample to meet the confidence requirements (see section 7.1).

HouseMark recognises that there are additional considerations when comparing a one-off fixed point in time survey with a tracking survey (compiled from surveys taken at various points in the year) and provides this contextual information within the online reporting tool to enable further analysis.

Transactional surveys should be carried out on a rolling basis, following on from each transaction, and results submitted to HouseMark should not be more than one financial year old.

In the case of transactional repairs surveys, the HouseMark STAR framework requires that these are carried out remotely following on from the repair. Operatives collecting satisfaction data face-to-face on site is not permitted, as customers should be given the opportunity to assess the repair after the operative has left. However, it is recommended that the survey is carried out within four weeks of the repair, and normally within a week.

Other transactional survey types can be carried out immediately after the interaction (or in the case of complaints and ASB, ideally within a month of the case being closed). It is not recommended that landlords issue transactional surveys more than six weeks after the transaction in question.

Even if administratively it is not possible to survey the tenant within the optimum window of opportunity, it is recommended that organisations aim to conduct each survey at the same time wherever possible (for example within a week or two-week period) for consistency and comparability.

## 11. Data protection, confidentiality and anonymity

Landlords carrying out or commissioning HouseMark STAR surveys must ensure that they comply fully with the requirements of the Data Protection Act 2018. Further information on this is included in the guides to running perception and transactional surveys available on our website.

For the purposes of HouseMark STAR, there are no specific requirements regarding anonymity and surveys may be carried out completely anonymously if the landlord chooses to.

However, we recognise that some landlords value being able to attribute the responses so that they can act on any specific feedback received. To cater for this, we recommend that all participants' feedback is 'confidential by default'. Once a customer has agreed to take part in the survey, it is important to be clear what will happen to the feedback they provide; therefore it is necessary to explain confidentiality and what that means for them<sup>11</sup>.

To ensure your survey is 'confidential by default', all participants should be given the opportunity to have their details attached to their feedback through two supplementary questions asked at the end of the survey. We would recommend asking these questions at the end of the survey rather than the beginning, as by this stage the participant knows exactly what feedback they have given during the survey and so is able to make an informed decision on whether or not they wish to have their name attached to this feedback.

The exact wording of the question may need to be altered depending on collection method and whether or not the survey is carried out in-house or outsourced, but an example is provided below.

Question	Response options
Your answers are currently confidential. It may be useful for your name to be attached to your responses and passed to [your social housing provider]. Would that be ok?	Yes – I agree to my name being attached to my responses No – I wish to remain anonymous
Are you happy for [your social housing provider] to contact you in connection with your feedback, if they wish to do so?	Yes No

The second question is worded in such a way as to allow the organisation to decide who they want to contact. If you are happy to commit to contacting all customers who want it, you can reword this question to ask customers if they want contact as a result of the

<sup>11</sup> Guidance on the difference between confidentiality and anonymity, and how this can vary depending on whether or not your survey is carried out in-house or is outsourced is available in our guides to running perception and transactional surveys.

survey. In this case the organisation must ensure that this contact is carried out or risk generating dissatisfaction.

If you choose not to offer participants anonymity, and they will be identifiable along with their responses this should be made clear to them at the start of the survey when you ask them to take part, so that they can make an informed decision about whether or not to take part in the survey on this basis. We wouldn't recommend this approach as this will discourage some customers from taking part or may mean that they are not completely honest in their responses if they know that they are going to be shared with the organisation.

## **12. Costs of HouseMark STAR**

HouseMark STAR guidance is freely available to anyone and our benchmarking services incorporating the data are included in our standard subscription fee. All social housing providers adopting HouseMark STAR principles into their surveys have to resource the running of these surveys themselves. You can carry out the surveys in-house or outsource to specialist market researchers.

A live list of research providers and feedback specialists that provide compliant surveys is available on request from HouseMark.

### 13. Building your survey

A key feature of the framework is that providers can decide what and how many questions they wish to ask. There are no standardised survey questionnaires within HouseMark STAR (although examples are available from HouseMark on request), and social housing providers choose the detail and length of their questionnaires themselves. In doing so, the following steps should be followed to build a compliant survey.

1. Be clear on the type of survey you are designing (perception, transactional repairs etc.)
2. Build the survey around the core satisfaction questions for that survey type.
3. Include any recommended questions for that survey type as appropriate.
4. Review the library of optional satisfaction questions with reference to the survey type and characteristics of the survey population and decide which are to be included in the survey (see HouseMark STAR question library).
5. Identify any additional satisfaction questions of your own to be included.
6. Adopt the appropriate rating scale for each question (see sections 5 and 6 and HouseMark STAR question library)
7. Determine the order of the survey questions and what if any headings and pragmatic groupings are to be used.
8. If you wish, add open-ended questions throughout the survey or at the end to allow the respondent to provide qualitative information. For example: Is there anything [your social housing provider] could do better?; What were you thinking of when you answered this question?; Or, Is there anything else you would like to say about your home and/or the services [your social housing provider] provides? When adding open-ended questions, it is important you consider how the data will be analysed and acted upon. Analysing free text can be resource intensive and the data should only be collected if you are going to make use of it.
9. Identify any additional data collection to be included (e.g. email addresses).
10. Add any demographic or contextual questions if appropriate.
11. Add anonymity questions as appropriate.

The result of this could be a survey question set ranging from just the core questions to a more extensive survey incorporating core, recommended and additional questions.

Throughout the question library, we use the general term '[your social housing provider]'. This is not the term to be used in the actual questionnaire: social housing providers should insert the name of their organisation here.

## 14. Benchmarking with HouseMark

HouseMark members can benchmark their HouseMark STAR results with more than 300 social housing providers UK-wide. There is no additional charge for this service which is included within the standard membership package.

Using the HouseMark online reporting solution, landlords can compare their results alongside other performance data and resourcing measures to gain a holistic view of the service they provide.

HouseMark members will be able to benchmark all of the core and recommended questions<sup>12</sup> for each of the following tenure types:

- General needs rented
- Housing for older people
- Supported housing
- Leaseholder
- Shared ownership
- Market rented

Data entry for the new measures will open in June 2020, with the first full annual results available in 2021.

Our online reporting solution provides the following features to aid your analysis:

- A configurable STAR dashboard
- Editable and downloadable reports
- Full datasets available for download, which include contextual information such as sample size and collection method
- The ability to filter peer groups by a wide range of contextual measures, including but not limited to landlord size, location and type.
- The ability to compare figures just for the year in question, or to include data up to three years old.

Data entry for the legacy STAR measures will remain open for one year, running in parallel with the new measures, before closing at the end of March 2021.

From June 2020, HouseMark will also offer its members a Star rating based on the satisfaction levels they have achieved. This Star rating will take account of key methodological and contextual variables that can impact on results, providing landlords

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<sup>12</sup> With the exception of the VFM for rent question which is not applicable to leaseholders.

with a fair overall assessment of the services they provide. This inevitably involves being able to quantify and adjust for key variables, and detailed research into this will be carried out between February and June 2020. The calculations behind these Star ratings will be made fully transparent in subsequent documentation.

HouseMark also provides a data helpline to assist you with all your comparison needs. Telephone 024 7647 2707 or email [data@housemark.co.uk](mailto:data@housemark.co.uk)



## 15. STAR in Scotland

The Scottish Social Housing Charter places a regulatory requirement on landlords to conduct a tenant and service user satisfaction survey and report results annually to the Scottish Housing Regulator (SHR) in their Annual Return on the Charter (ARC).

The Charter was updated and relaunched in April 2017 and although the survey requirements align with the previous STAR framework, the survey questions that Scottish landlords are required to ask have not been updated in line with this review and in some places differ from those detailed in this document.

Scottish landlords should therefore refer to the [SHR website](#) for guidance on how to carry out a STAR survey to ensure they meet their regulatory obligations.

Notwithstanding these changes, members of HouseMark Scotland are still able to benchmark the Scottish regulatory measures with us. As good practice, they can also build into their surveys the non-regulatory questions included in this document as these will provide them with additional insight and results that can be compared UK-wide.

In a number of cases, the core and recommended questions included in this document already match the regulatory questions in Scotland, but Scottish landlords should be mindful that their surveys must, as a priority, comply with the SHR requirements.

### Further information

For further information visit our website

[www.housemark.co.uk](http://www.housemark.co.uk) or call 024 7646 0500.

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