

Housing Support Redesign Tenant Insight Research

Viewpoint Housing Association

Summary Report

July 2021

indigohouse

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1. Introduction

1.1 Background and brief

Viewpoint Housing Association (Viewpoint) appointed Indigo House to carry out Tenant Insight research on its housing support services. The findings of this research will inform the redesign of Viewpoint's housing support offering. The context is that Edinburgh Health and Social Care Partnership (HSCP) confirmed that it will cease funding for housing support services for older adults. The Association's aim is to ensure that any future housing support model will meet the diverse and changing needs of tenants, promotes independent living and is financially sustainable.

The objectives of the research are to gain insight on the following:

- how tenants understand the current offering;
- understand of the changing needs and expectations of tenants;
- understand the role technology plays and the future aspirations of tenants;
- understand what, if any, financial contribution tenants would be willing to consider for future support services.

In considering this research it should be noted that there are three main types of relevant housing and associated support or housing services:

- **Sheltered** - currently have alarms, inactivity monitoring, staff on-site and support plans. There is sheltered and enhanced sheltered with the difference being the amount of time staff are on-site.
- **Alarmed** - currently only have alarms and inactivity monitoring – there is no staff on-site or Housing support planning.
- **Fife** – Currently have alarm, inactivity monitoring, staff on-site part time undertaking only housing management tasks and no support plan.

1.2 Research Methods

This research was carried out using a mixed method approach of qualitative and quantitative methods. This involved:

- Review of documents, and series of focus groups with 10 staff involved in leadership and service delivery of the housing support service, to provide initial navigation of the service;
- A programme of in-depth, semi-structured interviews and focus groups with 36 tenants living in retirement, alarmed, sheltered, and enhanced sheltered housing across Edinburgh, Fife, and Midlothian.

- Quantitative surveys undertaken across the same housing. The survey covered a total population of 983 tenants, with a substantial total response rate of 572, or 58%. Indicatively, a random sample of 572 from a population of 983 households provides a margin of error of +/- 2.65%.¹

Separate Appendices have been provided setting out the detailed qualitative and quantitative findings. Detailed findings are broken down by the different types of housing and location. This Summary Report brings together key findings and provides overall conclusions.

¹ Based on a 50% answer and a 95% confidence level. Assumes that the characteristics of respondents reflect those of the population and therefore have the characteristics of a random sample.

2. Key Findings

2.1 Reasons for first moving into sheltered/retirement housing

The single most common reason that individuals cited for moving into sheltered or retired housing in the first place was **‘wanting to feel safe’**, this option being selected by 49% of survey respondents overall, with a high of 52% of Edinburgh Sheltered respondents. The second most common response was the more general **‘I needed a home’**, and Edinburgh Alarmed respondents were more likely to choose this option over ‘wanting to feel safe’. Some people in Edinburgh in particular identified applying for sheltered housing as the best route to get an affordable home.

“I was homeless. Housing Officer said to bid for sheltered housing as being over 60 years.”

“I was in private rented accommodation. Rent increases were too high. I was trying for Edindex for years.”

(both Edinburgh sheltered)

There was also a sense of anticipating future needs. Survey respondents identified health needs, either current or future, and potential change in people’s lives which drove them to consider sheltered housing. Despite this, a significant proportion of tenants suggested they lived, and wished to continue living independent lives – this was particularly the case in Alarmed, Sheltered and Fife, but to a lesser extent in Enhanced Sheltered. This is a recurring theme throughout the findings and is important for Viewpoint’s redesign of services to make sure the approach is sufficiently nuanced to meet individual needs.

2.2 The current service offering

Overall service satisfaction

The survey and interviews considered the tenants’ opinion of current service and their opinion of the importance of different aspects of the support service.

Overall, 80% of tenants were satisfied with the existing service provision, ranging from 82% from Edinburgh Enhanced Sheltered tenants to 74% in Fife retirement homes where satisfaction was generally lower (see Chart 1 below).

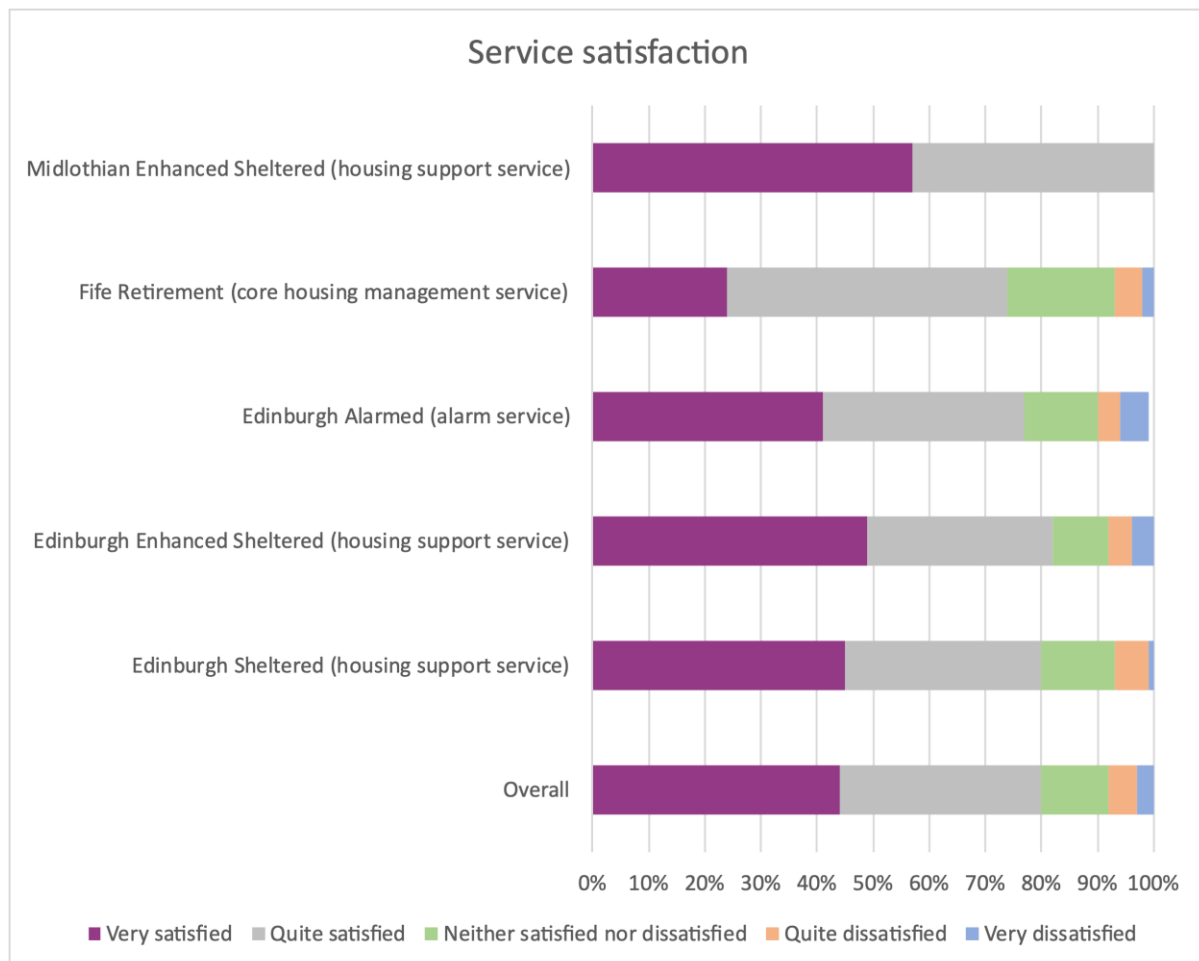
The main reasons for satisfaction related to staff attitudes and performance, and the existence of staff on-site was commonly referenced.

“Coordinator is proactive and empathetic whilst maintaining proper professional separation”
(Edinburgh sheltered)

“Good to have staff in the office near the door for safety and help when needed” (Edinburgh sheltered)

Examples from in-depth interviews with tenants and staff were also provided of staff going above and beyond their formal role with staff helping organise deliveries, organising social activities; assisting in incidents of acute ill-health; assisting with small maintenance jobs.

Chart 1: Satisfaction with existing service provision



Some areas of dissatisfaction also related to staffing presence on-site – this was reiterated in interviews with tenants which showed this was more to do with diminishing on-site service over the years rather than individual staff performance. Reference was made to services being withdrawn, or less intensive than previously, and although tenants largely stated that they led independent lives, they also did expect Viewpoint to be proactive in offering extra-support if needed, and face-to-face. Continuity of staff was valued for building rapport, with mobile/rotating staff being less popular. The lack of contact from co-ordinators and housing officers during the pandemic has been felt acutely by tenants.

“We don’t have a warden, we care for ourselves” (Alarmed)

“I don’t feel as secure here as I did before, mainly because of non-attention” (Fife).

It should be noted that some of these comments confirmed the current services/were a statement of fact (e.g. no on-site staff in Fife and Alarmed) but these comments were also made in a way to assert what they felt was lacking/what they wanted.

A common area of dissatisfaction related to the quality of repairs service and the condition of homes. This was raised in both the survey, and the interviews with tenants. In part this appeared to be about communication about repairs, but others referred to standard of house condition and repairs, in particular in relation to kitchens and bathrooms.

“My biggest gripe is communication, it just gets to a point where you just give up”. (Enhanced Sheltered)

“Viewpoint aren’t willing to put money into our complex as it is so run down” (Sheltered)

However, many referenced that their home was in an excellent location, particularly those in central Edinburgh, being close to amenities.

Importance of elements of a support service

Tenants were asked what was important to them in terms of a support services. As noted above, it should be noted that some services are not available in some types of housing, but all tenants were asked the same questions in terms of what was important to them.

In terms of the most important element of the support service, the alarm systems were most commonly identified amongst respondents’ top 5 priorities (74% overall) followed by having someone to maintain the safety and security of the building (64%), having someone as a point of contact about issues to do with their tenancy (62%), having someone to ensure communal repairs, bins and cleaning are dealt with (56%), inactivity monitoring (48%), having regular checks on welfare (45%), and liaising with other services (33%). When considering these aspects in terms of potential service redesign it should be noted that tenants in sheltered housing currently have all these services, whereas tenants in alarmed housing only have the alarm and inactivity monitoring and tenants in Fife have all with the exception of regular checks on welfare & liaising with other services.

Areas of the support service that were seen as less important included helping with small tasks, having someone available just in case, having someone available to help with letters etc., organisation of social activities and someone to help with technology.

Comparing these results for specific types of properties we can see what is significantly more or less important than all tenants on average. For tenants living in Alarmed properties, having someone present to deal with property matters (communal repairs, bins, cleaning etc) and small tasks was significantly more important, but they were much less concerned with having someone to help welfare, liaison with services and inactivity monitoring. Likewise, Fife tenants saw contact on property matters as significantly more important, but matters relating to

welfare and inactivity monitoring were less important. For sheltered housing tenants having regular checks on welfare and inactivity monitoring was significantly more important. These responses suggest the services currently provided broadly matches what tenants say are most important for them now.

A very significant proportion of respondents indicated that they do not need a regular welfare check, this being 45% overall - 60% amongst Edinburgh Alarmed respondents, 48% for Fife and 41% for Sheltered tenants. This was correlated with age with more of the older tenants requiring more regular checks. **Those that do want a check suggest that this should be weekly** (23% overall; 10% for Alarmed, 28% for Fife and 23% for Sheltered). A significant minority (15% overall; 12% Alarmed, 3% Fife and 16% Sheltered) do suggest a preference for daily checks on their welfare and this correlates to older age and mainly in Sheltered properties as may be expected. **Telephone is the most preferred method of having a welfare check** (62% overall; 63% in Alarmed and Sheltered and 46% in Fife) followed by contact through schemes' pull cord / alarm systems (although Alarmed tenants much less likely), with older tenants over 75 years expressing more of a preference for face-face contact. Alarmed tenants were much more likely to want contact through text messages compared to Fife and Sheltered tenants.

Overall, 75% of respondents considered having face-to-face contact with staff to be important but this varies very significantly by respondent type, with 90% of Edinburgh Enhanced Sheltered tenants considering this to be important but only 33% of Edinburgh Alarmed tenants and 57% of Fife Retirement tenants. These findings appear to correlate to the tenants' current experience i.e. what face-to-face service is available.

These survey findings are reiterated by the depth interviews. Most participants emphasised that they largely live independent lives, and interviewees stressed that they carry out basic daily tasks, such as laundry, shopping and meal preparation, by themselves or with the assistance of their family.

"I don't really need the services.... I do my own washing and my daughter helps me to get my shopping once a week." (Sheltered)

"I don't use any of their services as I am in my 70s and able to do most things myself"
(Sheltered)

Most interviewees did not consider that they received much formal or informal support from Viewpoint. The main services that people stated that Viewpoint provided them and that were valued were the alarm systems and the shared laundry services which they said is checked regularly by Viewpoint. As discussed above, on-site presence of staff was seen as a valuable aspect of the service. No tenants interviewed acknowledged the housing support planning which is provided by the co-ordinator, even in Sheltered services where these are provided.

2.3 Existing and future needs

The survey and interviews then explored the tenants' opinion of current and future need for various aspects of the support service. Not surprisingly, this reiterated tenants' opinion in relation to their perceived importance of support service aspects (discussed above).

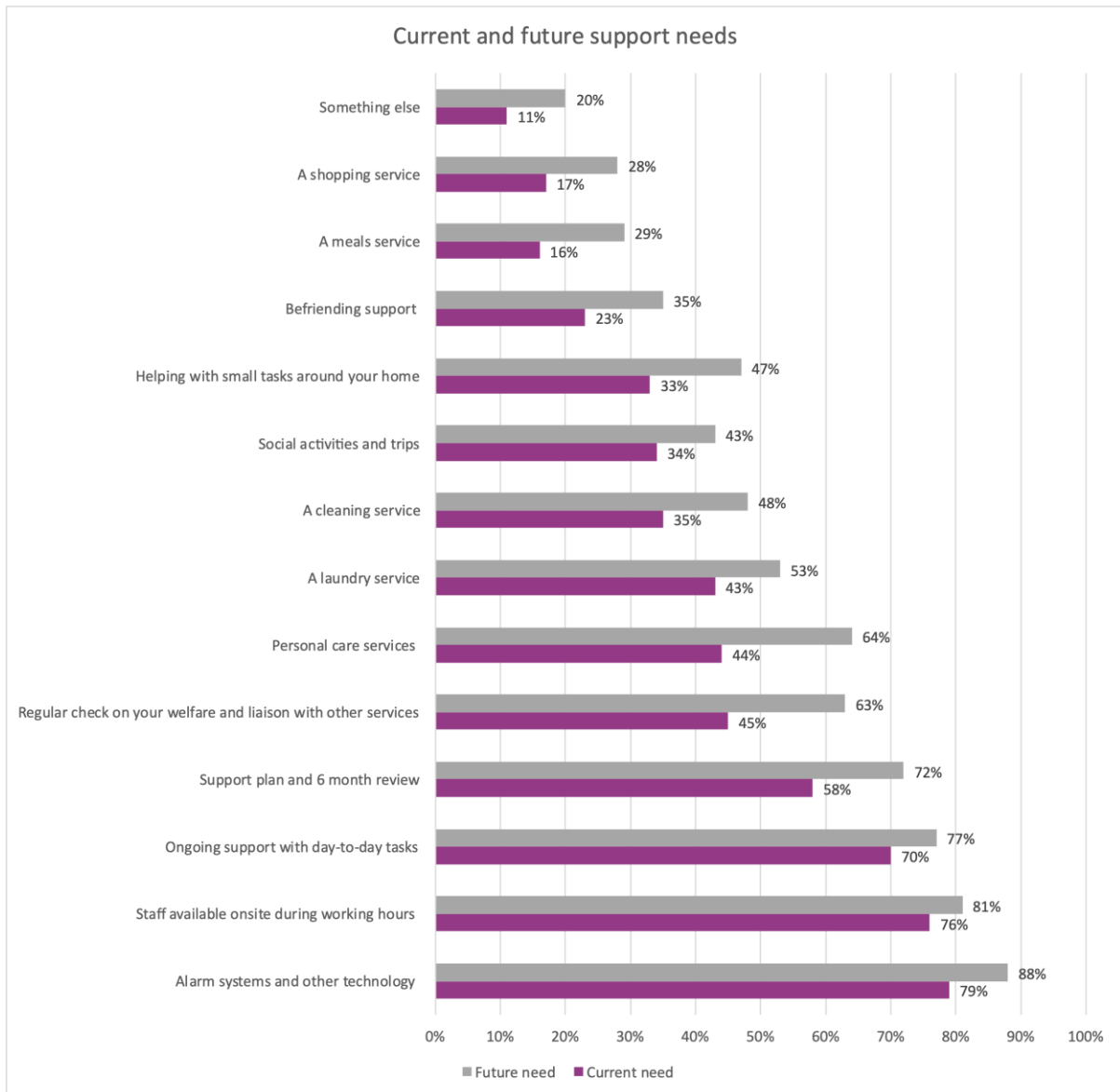
In terms of current needs, a significant proportion of tenants said they have a need for services; 79% expressed a need for alarm systems (which all tenants currently receive - with demand lowest from Fife 65%, followed by Alarmed 69% and highest from Sheltered at 83%); 76% expressed a need for staff available on-site (much less likely for Alarmed at 34%, and Fife 59%, and more likely amongst Sheltered tenants at 86%); and 70% a need for support with ongoing tasks like day-to-day repairs (lower for Alarmed at 60% and Fife 64% and higher for Sheltered at 73%).

Projected future levels of need showed demand for similar areas and are highest in relation to: alarm systems (88% overall but all with similar high levels Alarmed 86%, Sheltered 89% and Fife 82%); having staff available on-site (81% overall but with lower levels in Alarmed at 52%, Fife 62% and a highest in Sheltered at 89%); and ongoing support with day-to-day tasks like repairs (77%, with the lowest in Fife at 69% and highest in Sheltered at 79%).

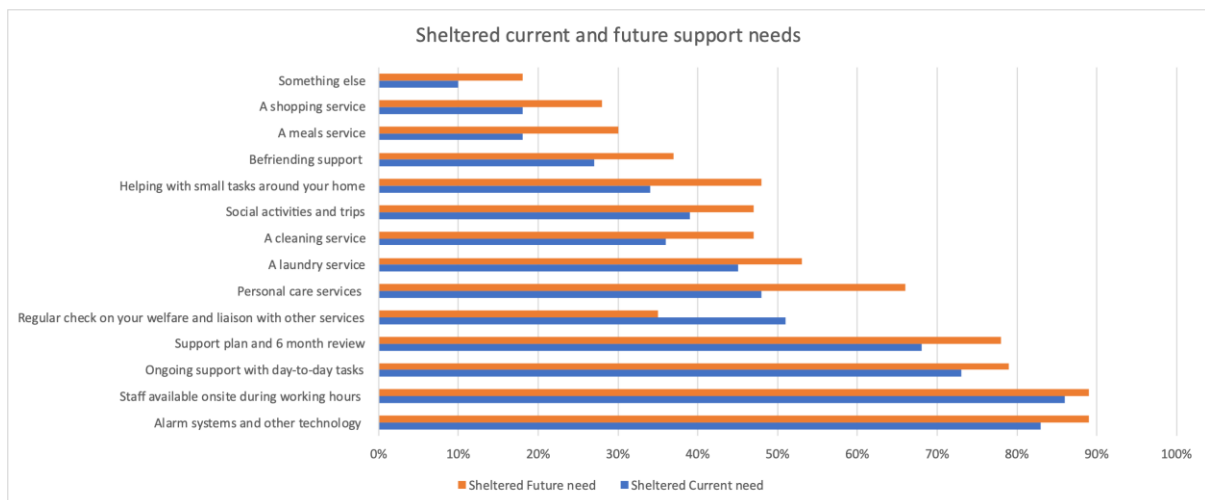
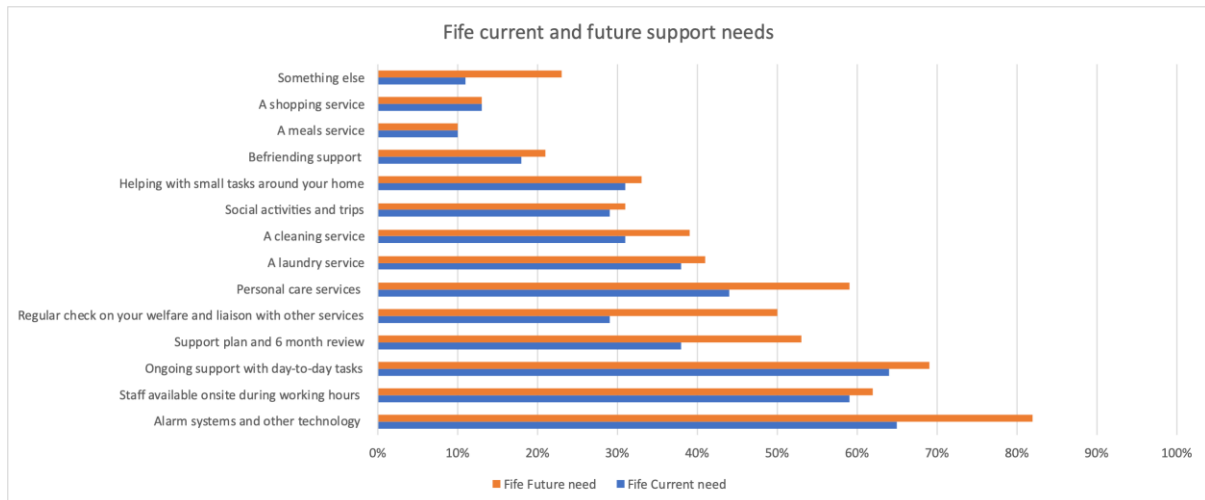
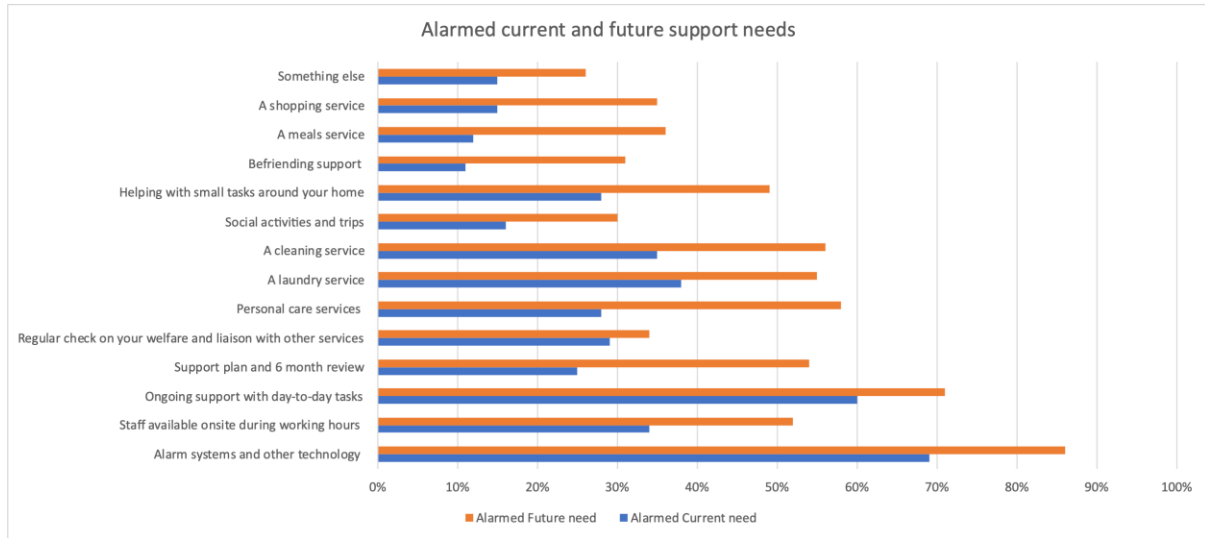
Overall, only 58% see themselves as having a current “need” for a support plan and regular 6-monthly review. This varied from a low of 25% in Alarmed, Fife 38% and high of 68% in Sheltered and was also clearly correlated to age. **However, future need increased to 72% of tenants** seeing themselves having a future need for a support plan and regular 6-monthly review (low of 54%/53% for Alarmed and Fife, and 78% for Sheltered). This broadly correlate to the services that are currently received i.e. higher current and future need is seen in as greater where these support plans are provided.

A substantial minority of tenants expressed the current and future need for other services including personal care (current 44% overall, with a significant future increase to 64%); a laundry service (current 43%, future increase to 54%); a cleaning service (35% to 48%); social activities and trips (34% to 43%); and support with small tasks around the home (33% increasing to 47%). A lower proportion stated the need for other services including shopping or meal services, but again all increased in terms of future needs (see chart 2A below and followed by Chart 2B-D by house type).

Chart 2A: Current and Future needs for aspects of support for ALL responding tenants



Charts 2B-D: Current and Future needs for aspects of support for responding tenants by house type



Exploring current and future needs in more depth, interviews with tenants showed it was their aspiration for their current home to be their final home. Participants showed no appetite for moving to another property because of the upheaval that it would cause. Some tenants specifically mentioned that they did not wish to go to a care home. For example, participants stated:

“The last thing I want is to be put in a care home” (Fife)

*“I would like to think this is where I’ll be, I don’t really want to go to a care home”
(Sheltered)*

Participants generally wanted to remain independent for as long as possible. Most interviewees were content with the current level of support, which they considered generally minimal. However, many interviewees recognised that they may require additional, more intensive support as they grow older. Despite recognising that they may need additional support in future, many tenants struggled to articulate specifically what this would be and stated that it would be dependent on potential ill-health or disability. Others did not want to guess what support they may or may not need in future.

“I don’t want to think ahead beyond this point and just hope that I keep going until I am 90 and able to do things before I pop my clogs....I am quite happy in my wee cottage.” (Alarmed)

A large majority of participants did not receive any care package currently. However, most agreed that if this was needed in future, it would make sense for care and support to be delivered by the same provider, and that continuity of care is very important.

“We do need continuity of care” (Sheltered)

2.4 The Role of Technology

Nearly two thirds, or 64% of respondents had internet access. This figure varied between 61% in Edinburgh Sheltered and 70% Fife (apart from a much lower proportion of 43% in the Midlothian tenants which was only a small number of respondents).

Internet usage was correlated with age, with greater usage amongst younger tenants: 82% amongst those aged under 65, 75% amongst those aged 65-74, 64% amongst those aged 75-84 and 36% amongst those aged 85+. This suggests that over time, with turnover of tenants, internet usage will increase.

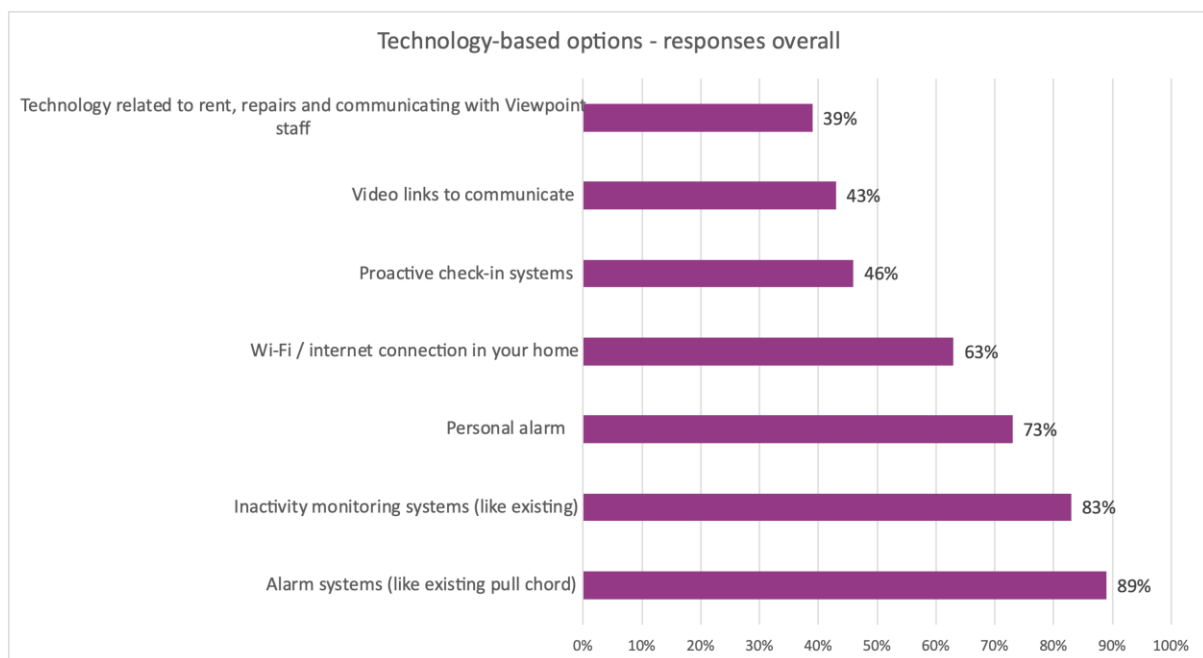
The most common method for accessing the internet was smartphones (40% overall, with a high of 50% in Alarmed and low of 37% in Sheltered) followed by tablets and laptops / computers (32% and 31% respectively).

The survey explored tenants’ interest in existing and emerging technology with the most popular focusing on existing technology: alarm systems (89% overall with similar rates across all house types; highest in Fife 92%, Sheltered 91% and Alarmed 81%), inactivity monitoring systems

(83%, with Sheltered highest at 86%, and Alarmed and Fife the same at 73%) and personal alarms (73% - highest in Fife at 94% followed by Sheltered at 73% and Alarmed at 65%). Slightly fewer (63% overall) expressed an interest in having a Wi-Fi / internet connection from their home (highest in Alarmed at 74%, Sheltered at 63% and Fife at 47%). See chart 3 below).

A significant minority of respondents expressed an interest in other systems including to let tenants proactively checking-in (46% on average; higher in Fife at 57% and broadly similar to the average for Sheltered and Alarmed), a video link to activate door-entry systems and to communicate with others (43%; again higher in Fife at 55% and similar to the average in Sheltered and Alarm) and technology to let tenants pay rent, request repairs and communicate directly with Viewpoint staff (39%; highest in Fife and Alarmed at 57/53%, lowest in Sheltered at 33%).

Chart 3: Interest in technology-based options as part of overall housing support service



These findings are confirmed from the depth interviews. Most tenants felt that the existing technologies in tenants’ homes, such as the pullcord system and activity monitoring system met their needs. These technologies were generally said to offer security, and tenants said they were comforted by the presence of these specific technologies in their homes. Moreover, interviewees felt assured that should an incident occur then these technologies would result in tenants receiving assistance.

*“The alarm system and Hanover Telecare have been a lifesaver...I have no fear anymore.”
(Alarmed)*

“It reassures my family. It’s good to know it’s there if you need it”(Fife)

Some tenants offered an alternative perspective and believed that the current system was ‘antiquated’ and that Viewpoint should invest in better/more modern technologies. There was further discussion around the use of the pullcord in emergencies, particularly in the evenings and weekends. It was mentioned that either the next of kin or an ambulance are called to attend. It was viewed by some tenants that there is a lack of an “in-between” option. One participant stated that the Co-ordinator should play a role in responding here as some tenants’ next of kin live far away. Some interviewees also commented on the odd positioning of pull-chords (e.g. behind a fridge-freezer), or that pullcords were too high, and some had rotted away.

Tenants’ views of the role of technology in future Viewpoint services were mixed. Some tenants stated that they do not feel comfortable with technology or were concerned for their neighbours who do not have the knowledge, skills or desire to engage in new technologies. Others stated that they had disabilities that would prevent them from using more technology and others were sceptical of scams and hacks.

“I don’t do technology. What’s wrong with a pen and a piece of paper?”

“All of this online stuff I find really difficult”

“Some of them [their neighbours] don’t know how to turn on the TV” (Mixed focus group)

Many interviewees referenced Viewpoint’s computer classes that ran prior to lockdown. This was generally viewed positively with many tenants showing a willingness to learn more digital skills. Others believed there was a need for more IT support. One participant mentioned that their Coordinator often assisted them with IT related matters, and that in person assistance was valued.

Despite some scepticism, many interviewees from across all site-types and locations welcomed the use of more technology in Viewpoint services. Many had cited that they were adept and comfortable with various technologies, and some had become accustomed to using online video over the past year to communicate with friends and relatives. One interviewee cited a service whereby residents could arrange to speak to their GP by web-video.

However, for those tenants who welcomed more technology in future services, there was a general feeling that tenants should have a choice between digital services and face-to-face services, as summed up below:

“I think these things are all good and well, but it should be a choice for the individual what they want to have and to use.” (Fife)

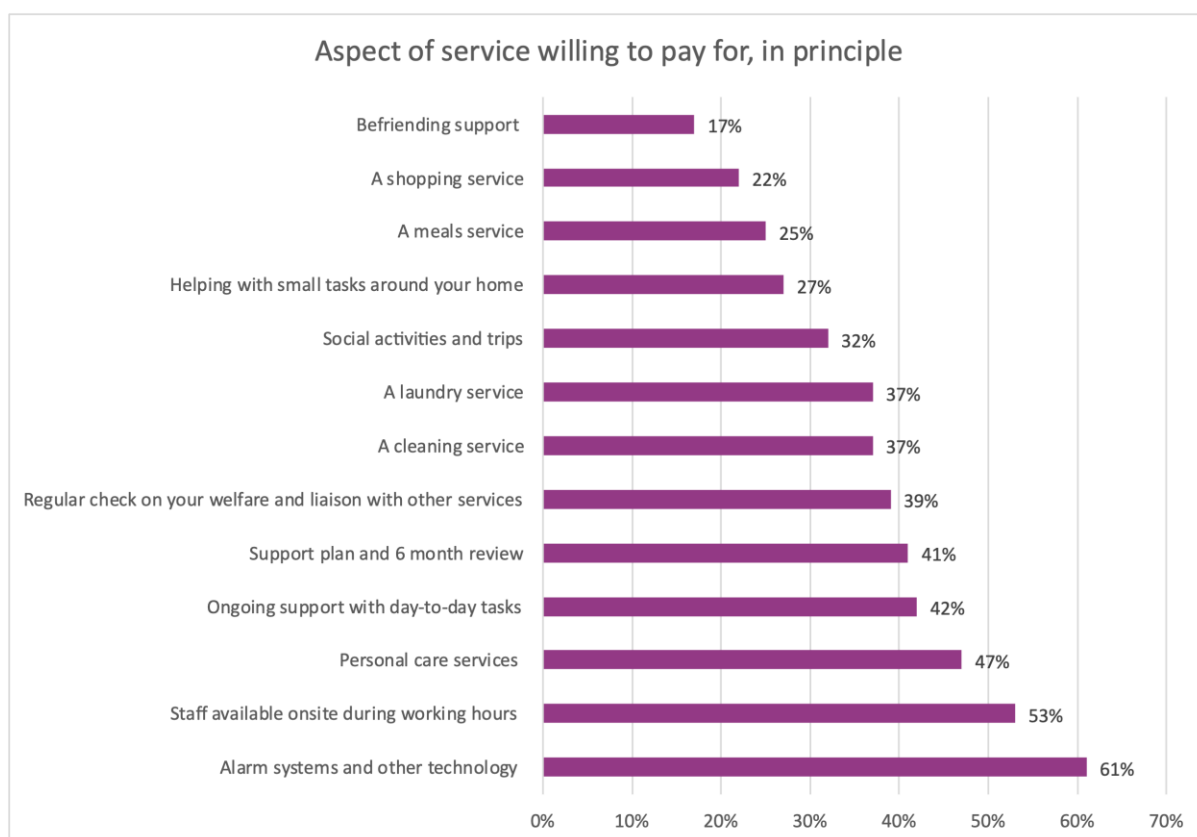
“I am a non-techno gran and I think for the older people here moving more and more to technology, they don’t want that. People need that personal connection, and I would be wary of technology taking over.” (Sheltered)

Tenants also believed that for technology to play a bigger role in any future Viewpoint services, then the buildings would have to be installed with Wi-Fi. Some believed this should be free to residents while others suggested that they would be willing to pay for this.

2.5 Financial sustainability

Using this same list on aspects of support as explored for current and future needs, survey respondents were asked to indicate whether they would be willing, in principle, to make a financial contribution towards these aspects of support. This is shown in Chart 4. The results broadly reflect what support services tenants think are most important, and what they think they need now or in the future. These were most likely to be alarm services, staff being available during working hours, and personal care.

Chart 4: Willingness to make a financial contribution to aspects of support



In relation to responses by type of property, in all but one of the questions the Fife respondents were much less likely to be willing to pay for services than Alarmed and Sheltered tenants. The only exception was for personal care services where all the respondents by property type provided a similar positive response. Alarmed respondents were more positive for ‘Help with small tasks’, ‘Befriending’ and a ‘Shopping service’ than other property types. Sheltered responses were generally in line with the average shown above.

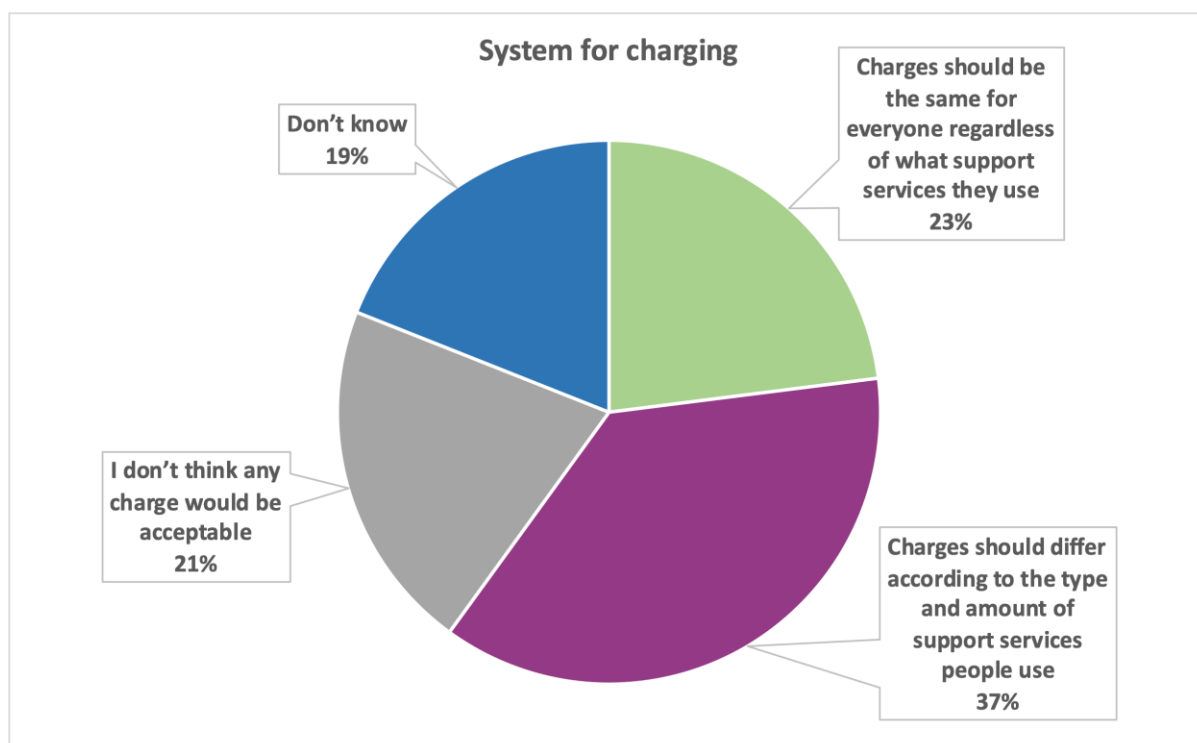
It is also notable that the proportion of respondents that do not think any charge would be acceptable is correlated with existing dissatisfaction. Amongst all survey respondents, 22% of those that express satisfaction with whatever their current service is say they do not think any charge would be acceptable, but this rises to 33% amongst those that are neither satisfied nor dissatisfied with their current service and to 45% amongst those that are dissatisfied with their current service. Five respondents are more likely to be dissatisfied with their service, and less willing to pay for future support services.

There was not clear consensus from tenants about what an acceptable charge would be for these services; a significant proportion of respondents (29%) gave a “Don’t know” response, and 26% indicated that they did not consider any charge to be acceptable. Five respondents were most likely to say no charge would be acceptable. When respondents did indicate a charge would be acceptable it is most **commonly in the “Up to £10” category for a monthly contribution.**

Respondents were also asked about several options for charging – whether the charges should differ according to the type and amount of service used, whether there should be the same charges regardless of services used, or whether there should be no charges.

There was again no clear consensus about charging options. Most commonly 37% considered that charges should differ according to the type and amount of support services people use compared to 23% who felt that charges should be the same for everyone regardless of the support services that they used (see Chart 5). 19% of those that responded to this question gave a “Don’t know” response and a further 21% indicated that they did not consider any charge to be acceptable. When expressed as a proportion only of those that gave a view (i.e. excluding “don’t knows”), **62% considered that charges should differ according to the type and amount of support services people use** compared to 38% who felt that charges should be the same for everyone regardless of the support services that they used.

Chart 5: Approach to charging in relation to service used



A question was also posed in relation to **approaches to charging in relation to ability to pay**. There was again no clear consensus around this issue. A significant proportion (27%) of those that responded to this question gave a “Don’t know” response and a further 24% indicated that they did not consider any charge to be acceptable. **The remainder were fairly evenly split overall**, between the 24% that considered that charges should be the same for everyone and the 25% that considered there should be a subsidy for people on low incomes or resources.

The in-depth interviews with tenants around contributing financially to Viewpoint services were also mixed – these could be broadly categorised as those that would not pay under any circumstances, and those that may pay, but this depended on the tenants’ level of need and services offered.

For those tenants that explicitly stated that they would not personally contribute to any service the reasons revolved around affordability and value for money. Some referred to reliance on social security and therefore inability to afford to pay extra; some tenants believed that their rent and service charges were already high and they felt it would be unfair to pay more. Some tenants felt that they were not currently getting value for money. Others believed they did not require any support services and thus would not be willing to pay extra.

“I don’t have the financial means to pay for any more services” (Fife)

“I think I am contributing enough and it is adequate, and no I do not think I should or want to contribute more.” (Alarmed)

However, others stated that they would be willing to pay for support services in future. A few tenants stated that they already use private services and that co-ordinators had helped to arrange these private services for them e.g. cleaners, shopping services.

“I think Viewpoint could maybe offer things like shopping, laundry and cleaning. I don’t need any of these things but may well in the future.” (Sheltered)

“I would be happy to pay for certain things and I already do.” (Sheltered)

“If I use it, I’d be willing to pay for it.” (Alarm)

3. Conclusions

How tenants understand the current offering

It is clear that demand for sheltered housing is mainly driven by a desire for a safe and secure environment. For some this was related to current needs, and importantly was also about anticipating future health needs. Despite this, a significant proportion of tenants suggested they lived, and wished to continue living independent lives. This was a recurring theme throughout the findings and is important for Viewpoint's redesign of services to make sure the approach is sufficiently nuanced to meet individual needs.

Services that drive high levels of satisfaction are alarm services, and the presence and continuity of staff on-site, dealing with both property and people requirements. Most tenants want face-to-face contact with staff, but it is interesting to note that almost half of tenants do not see welfare checks as important, and if there are checks these should be hands-off by telephone. Aspects of the service that are not working so well from tenants' perspective relate to condition of 'out-dated' homes (specifically bathrooms and kitchens), repair services and communication.

The changing needs and expectations of tenants

Tenants' opinion of their current support needs unsurprisingly is similar to what tenants consider to be most important in the current service – alarms, on-site staff, and support with general day-to-day tasks (property and people). The same areas of need for support are identified for the future, but from an increasing proportion of tenants. Those with lower needs currently identify a higher proportional increase in need for support services in the future. While demand for support planning is currently only just over half of tenants, this is seen to increase to almost three quarters of tenants in future. An important finding in relation to future needs is that many tenants do not want to move again, and want this to be their last home, without the need for moving to a care home. The need for personal care is therefore also seen to increase.

Taking the combined findings from why people choose sheltered housing, satisfaction and understanding of the current service, and their current and future needs, it is clear that 'wanting to feel safe' is correlated both with having an alarm service, but also with having on-site staffing presence. This staffing presence is also related to range of other tenancy and general wellbeing/support services, and is particularly important for older tenants over 75. However, there also appears to be a tension between the desire for general on-site presence, and for "hands-off" welfare responses i.e. telephone, although more demand for face-face services for older tenants. This reiterates the diverse range of needs and preferences, and the requirement for an individual person-centred response to meet needs in future. It is also clear that the continuity of support and care is important to tenants which may present an

opportunity for Viewpoint, in a similar way to services offered at Croft-an-Righ with joined up support and care.

The role technology plays and the future aspirations of tenants

The majority of current tenants use the internet (by a variety of means including smartphone, tablet and laptop / PC) with levels of internet usage being closely correlated with age, with younger people being much more likely to be internet users. This demographic is important in relation to service planning; as tenancies turnover it is highly likely that demand for digital based services will increase.

The technology-based options for housing support in which tenants most commonly express interest are alarm systems, inactivity monitoring, personal alarms and, to some extent, internet / Wi-Fi connections in the home. There is limited declared interest in some more “innovative” technology-based options, which may partly reflect a lack of familiarity with those options. Again, this may change as tenants more familiar with digital solutions move into Viewpoint tenancies. There is a general appetite for more hands-on IT support, learning, and training being made available on-site, which again provides an opportunity for Viewpoint to enable digital service engagement.

Financial sustainability

Unsurprisingly, tenants are most willing to pay for services that they need and want – alarms and staff on-site – these are the only areas where over 50% of tenants said they would be willing to pay for service. A minority indicated they would be willing in principle to make a financial contribution towards a support plan and regular 6-monthly review or a regular welfare check. Even amongst those that indicated they would be willing to make a contribution towards such a service, the level of contribution that people would consider acceptable is modest. There is a general (though not overwhelming) preference that any charges should reflect the specific services that people use. There is no clear consensus as to whether and how ability to pay should be reflected in any future charging structure. Again, this suggests that should any fee structure be put in place for future services, then these should be individualised.

Relevance of support services by property type

In overall terms Sheltered tenants see that they have the highest current and future needs, followed by Alarmed tenants and then Fife tenants. Fife respondents are also least satisfied.

However, it is also notable that there is actually a lot of commonality between the different property types in terms of the most important aspects of service. It is clear that the Alarmed and, to some extent, Fife tenants seem much less likely to say they require any kind of check on their welfare – this perhaps reflects their current needs and the services they receive. This

is not to say tenants do not see the importance of some services that they currently do not receive, and there is a widespread recognition of increasing need for support in the future.

As may be expected, the desire for face-to-face contact is correlated with need – higher amongst Sheltered tenants (and particularly enhanced) than others – and this is also strongly correlated by age. This said, age should not be assumed to be an easy proxy for need, and the key challenge for service redesign will be identifying the level at which the face-to-face and on-site services are required. A similar theme is that those currently in Enhanced Sheltered are more likely than others to be interested in those items of technology that give security when things potentially go wrong – for example inactivity monitoring, personal alarms – although these tend to be important across the board.

The stated desire and need for having staff on-site is notably lower amongst Alarmed residents (presumably alarms give sufficient reassurance) and Fife retirement tenants. While some tenants in interviews emphasised the importance of face-to-face contact, research at scale confirms this is currently less important, but in future more important. This likely reflects people valuing what they have, but respondents acknowledge that their need for face-to-face support and care services will increase with age. At the same time, people do not want to move and so the services should be flexible and adaptable to meet people's needs rather than requiring people to move to obtain care and support that they need.

The current needs and demands are reflected in the willingness of people to pay for different services. The willingness to make a contribution to on-site staff is much lower amongst existing Alarmed and Fife respondents, but this willingness would perhaps increase as need increases as shown by Sheltered tenants. It is also clear that Fife respondents were less open to making a financial contribution across a range of services. We are unable to conclude why this may be the case, but one reason may be due to a relatively recent change to service decreasing satisfaction, or tenants readjusting to what is provided (and so expecting less).

In overall terms, as tenants can obviously see their needs increasing in future, there are opportunities to redesign the service as providing benefits (ability to get help when needed), rather than individual features (e.g. staff on-site). The research suggests demand and need for an individualised approach, which adapts to people's needs. So rather than categorising buildings as types of services that someone can expect (sheltered, enhanced, alarmed etc), there is an opportunity to develop a service around components of services that build up over time for people as they get older with higher needs – starting with a basic service with additional elements of housing support / technology etc. being added on as they require them. This may suggest a limited “core” service that can progressively be added to through technology and visiting support as people need and demand it.