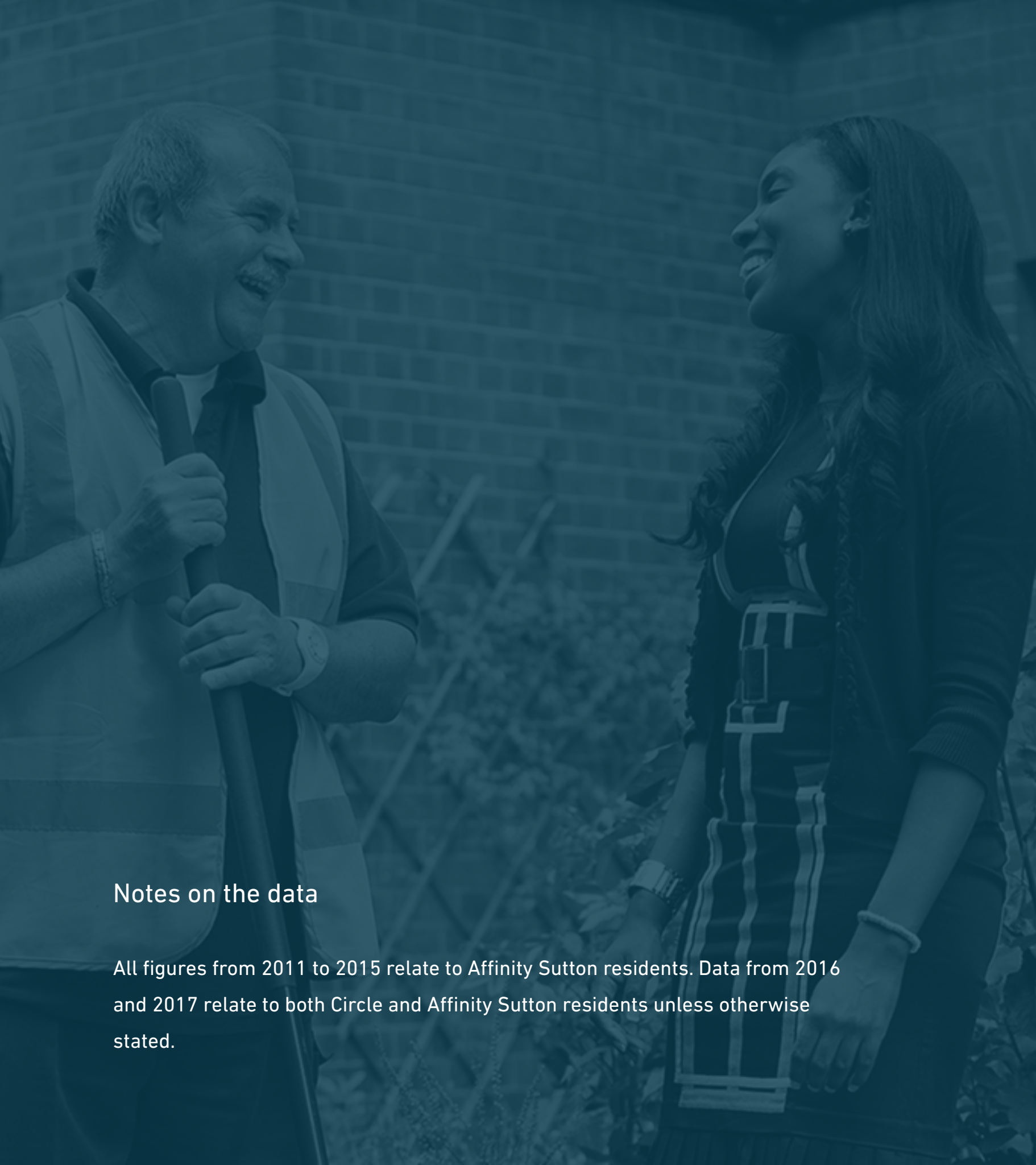




CLARION
HOUSING GROUP

The Clarion Index 2017

Findings from Clarion's annual survey of
2,000 residents in Summer 2017

A photograph of a man and a woman standing on a construction site. The man, on the left, is wearing a high-visibility vest and holding a shovel. The woman, on the right, is wearing a safety harness. Both are smiling and looking at each other. The background shows a brick wall and some construction materials.

Notes on the data

All figures from 2011 to 2015 relate to Affinity Sutton residents. Data from 2016 and 2017 relate to both Circle and Affinity Sutton residents unless otherwise stated.

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Foreword

Welcome to the Index 2017, the summary findings from our first survey of Clarion residents across the country – a sample of 2,000 households - which builds on five years of insight from Affinity Sutton resident surveys and a short survey of Circle residents in December 2016. Following our merger in November 2016 we wanted to quickly understand what is important to them, what their aspirations are and how they are experiencing the myriad changes taking place in the UK from welfare reform to Brexit.

One of the biggest changes for many of our working age residents who currently receive benefits will be the introduction of Universal Credit. The survey found that only just over half (51%) of residents were aware that it was coming. This is a significant concern for us since it represents a sea-change in how those in receipt of benefits will be paying their rent. We know from the experience of residents who have already moved to Universal Credit that lengthy delays for the first payment have caused hardship and an increase in rent arrears¹, so it is essential that we do more to help our residents prepare.

We continue to see a steady increase in our residents transacting online and the proportion of residents going without food to save money has fallen from 17% last year to 14% this year, although it remains troubling that even a single household should ever need to do so.

I am encouraged by the increase (+11%) in the proportion of residents who are finding our services easy to access but appreciate that with 19% finding access difficult, we still have work to do in this area.

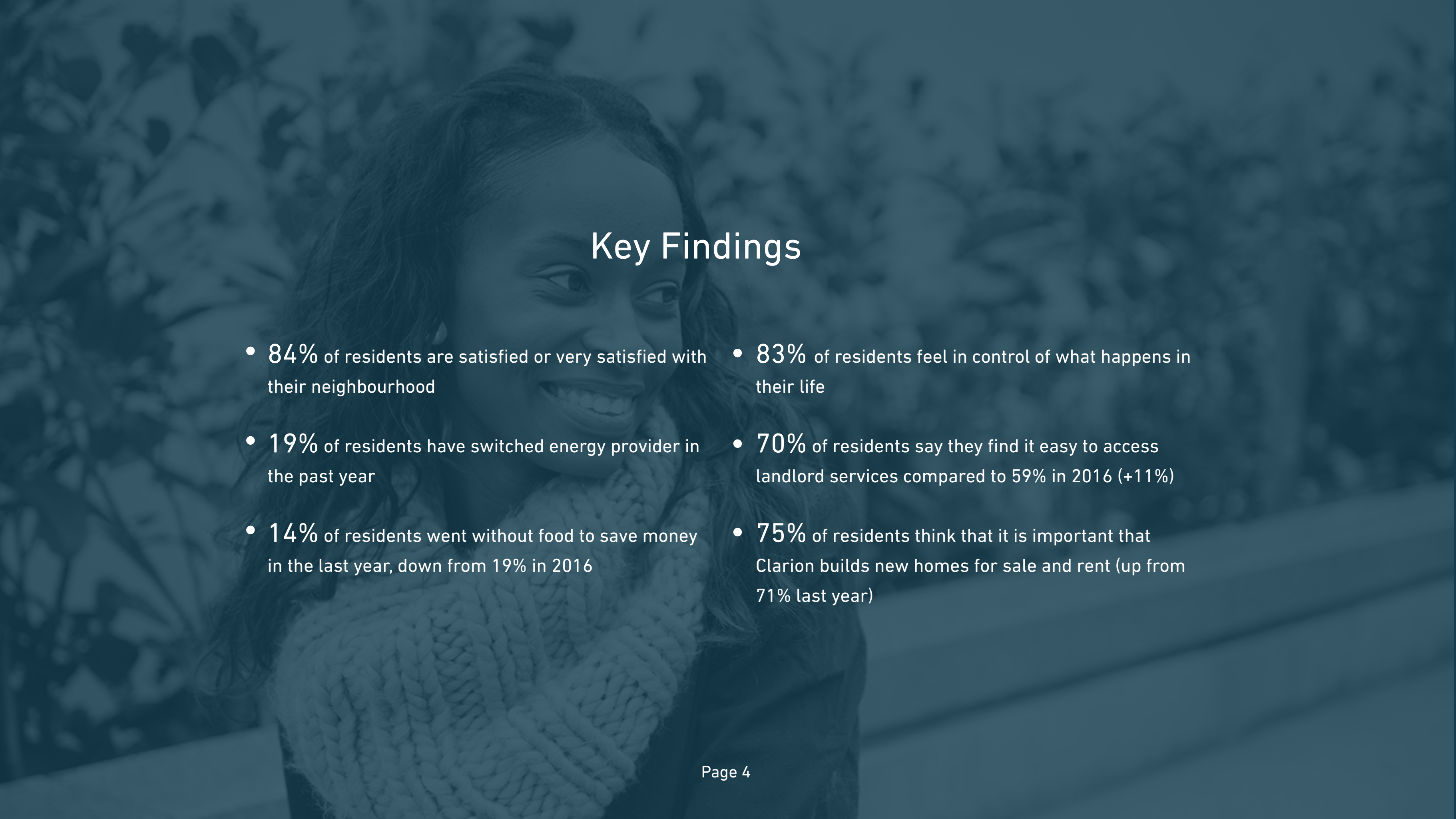
A surprising finding, but one that chimes with Public Health England's findings for UK adults², is that residents are significantly less active than they were a year ago. Last year 29% of residents did not regularly participate in at least one of the activities we listed, this year the same activities were read out but the proportion of residents doing none of these activities has risen to 41% (+12%).

This cannot be linked to financial constraints as walking, a free activity fell off most significantly from 56% of residents regularly walking last year to just 38% this year (-18%). We will be looking for ways to work with other agencies to encourage residents to do more as improved physical and mental wellbeing is strongly linked with an active lifestyle³. We will also carry out further analysis and qualitative study to understand what might be driving this statistically significant shift.

The Index does raise some concerns about the wellbeing and finances of particular groups and the imminent roll-out of Universal Credit clearly presents some risk to a large number of households who are not aware of it. However I am confident that by working with residents we can meet these challenges and see more people in good quality homes, with secure and independent lives.

Neil McCall

Clarion Housing Association Chief Executive



Key Findings

- **84%** of residents are satisfied or very satisfied with their neighbourhood
- **19%** of residents have switched energy provider in the past year
- **14%** of residents went without food to save money in the last year, down from 19% in 2016
- **83%** of residents feel in control of what happens in their life
- **70%** of residents say they find it easy to access landlord services compared to 59% in 2016 (+11%)
- **75%** of residents think that it is important that Clarion builds new homes for sale and rent (up from 71% last year)

Building new homes

Increasing the capacity to build more new homes to help address the housing shortage was a key part of the rationale for the merger between Circle and Affinity Sutton housing associations. When asked, only 57% of residents said they were aware that Clarion builds new homes for rent and sale. However, once informed, three quarters of Clarion residents said they think it is important that their landlord builds more homes.

The Group aims to develop 50,000 new homes across different tenures during the next ten years so it is positive that residents agree that this is an important ambition.

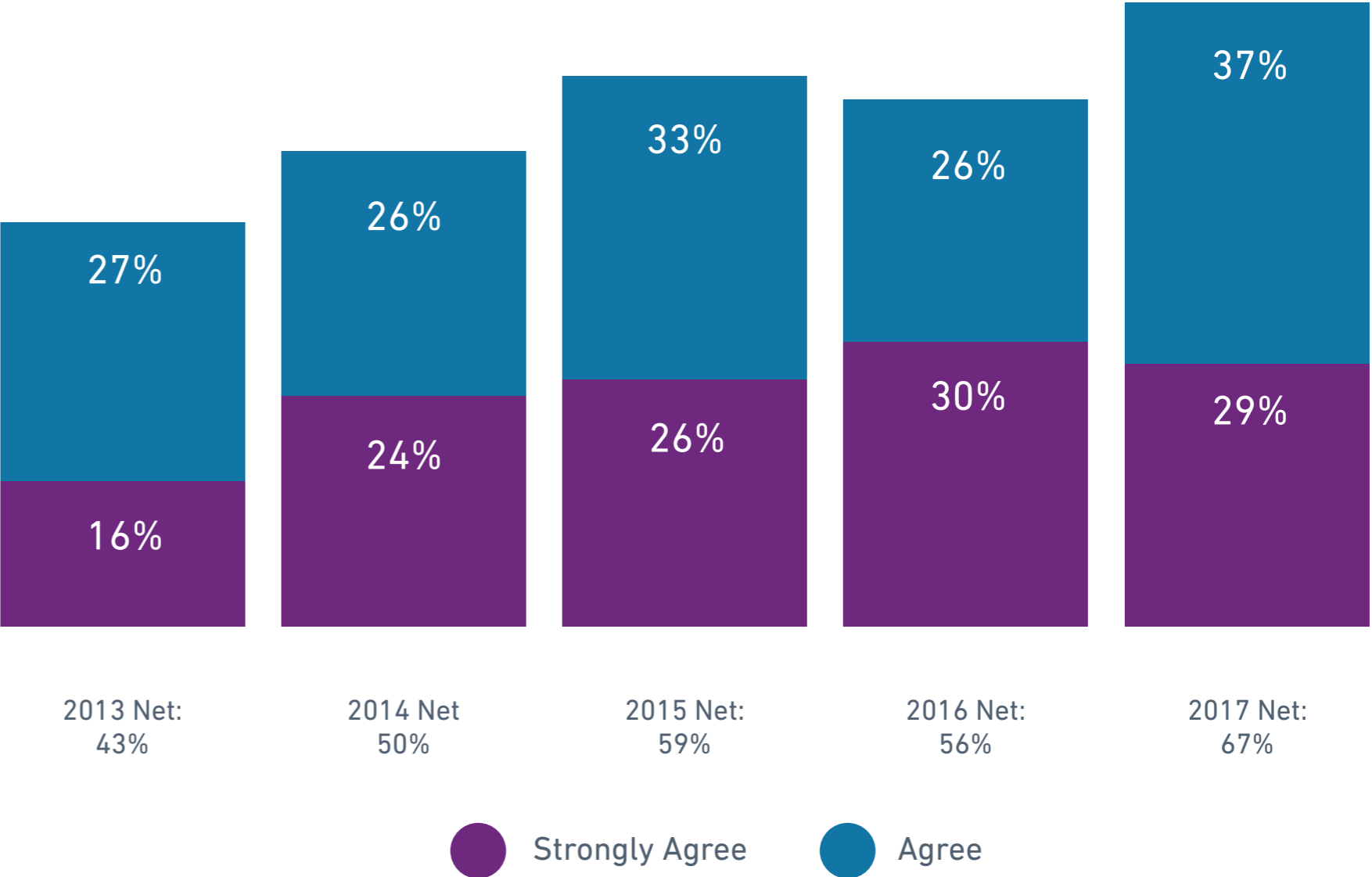
75%

of residents say it is important to them that Clarion builds more homes

How far do you agree with the statement, “There is a need for more homes in my area”?

Base: All respondents (2017:n2000, 2016:n1000 AS only, 2015:n1004, 2014:n1001, 2013:n1051)

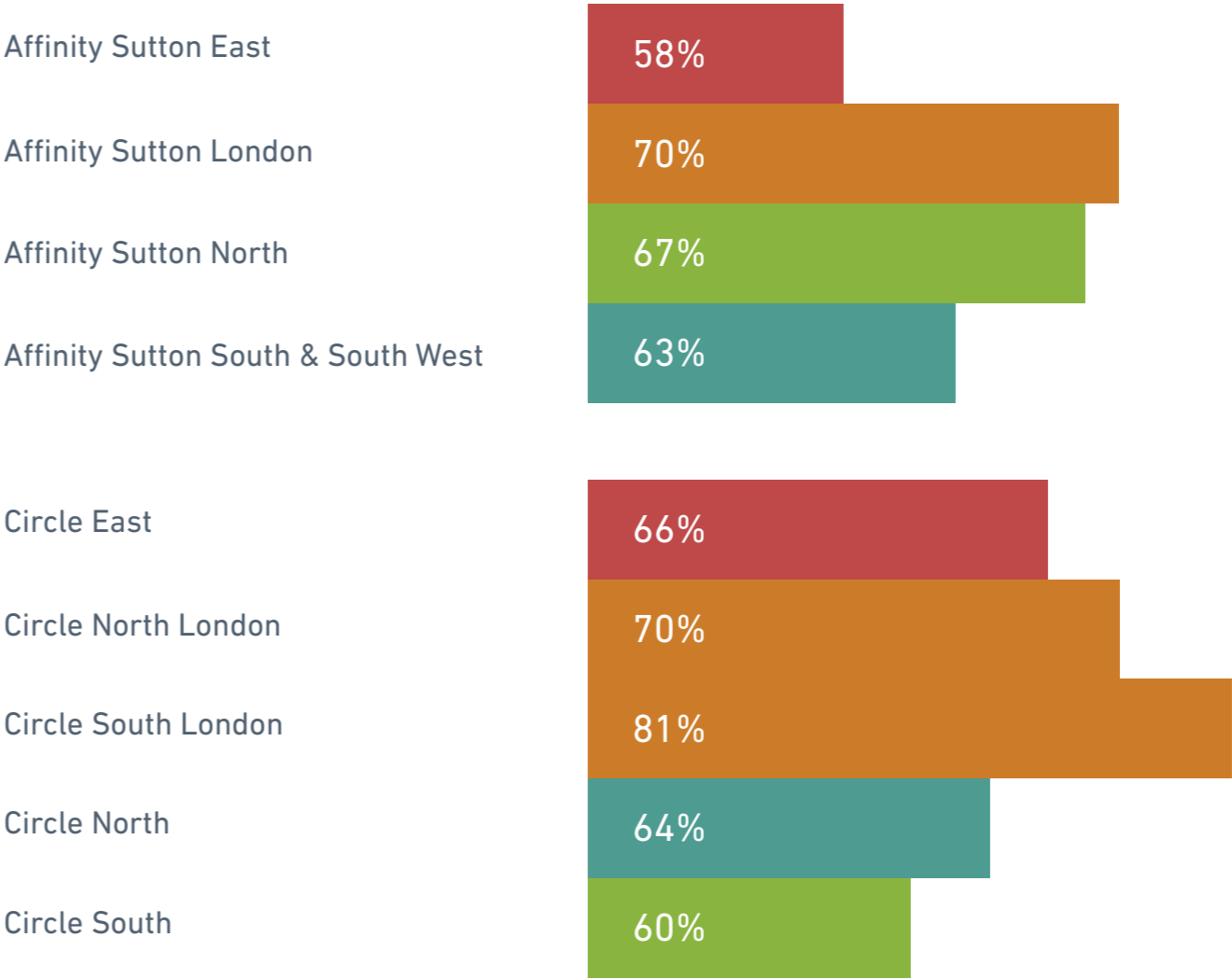
Last year saw a slight decrease in the proportion of residents agreeing that there is a need for more homes in their area, following steady year on year increases from 2013 to 2015. Whether this result marked a plateau or the start of a decline in concern about the housing shortage was one of the outstanding questions posed in The Index 2016. This year the overall proportion in agreement has significantly increased to 67% from 56% in 2016 indicating that last year’s finding was likely an anomaly as opposed to a trend shift.



How far do you agree with the statement, “There is a need for more homes in my area”? by operating region

Base: All respondents (n2000)

In 2016 the Affinity Sutton East region showed the lowest level of agreement with the statement that more homes were needed in their area at 46%, with London the highest at 62%. This year, the highest proportion in agreement overall is driven again by London regions. Like last year, those living in areas where housing is under the most pressure are feeling the greatest need for new homes. Circle and Affinity Sutton use different operating areas so these are reported separately here but the London effect is quite clear.

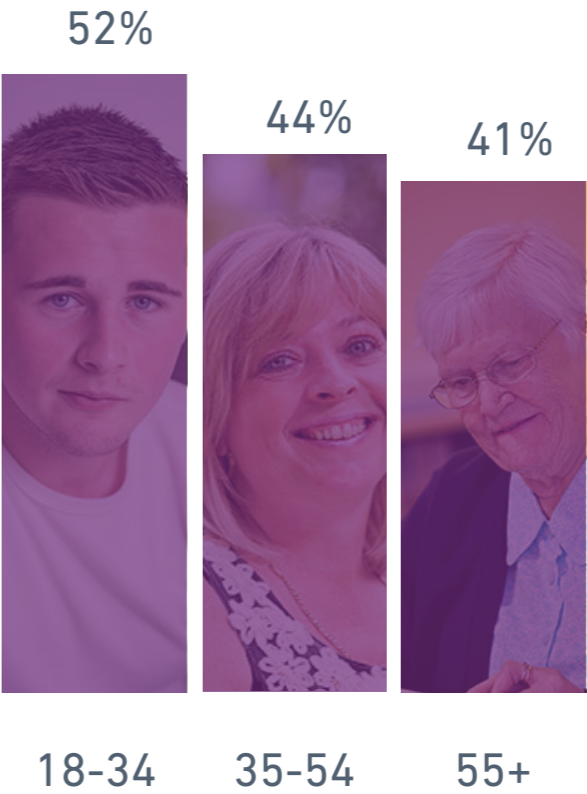


Whether new homes should be built on land that has not been built on before ('greenfield' sites) is a question that splits opinion among residents every year. Last year 42% agreed that homes should be built on greenfield sites and 46% disagreed; this year 44% agreed and 43% disagreed. Households with children living at home continue to be more supportive of building on greenfield sites, with 49% in agreement compared to 42% of those without children at home.

Younger residents are significantly more likely to agree that new homes should be built on greenfield sites and this marks a shift from last year where results were relatively flat across age bands with older residents slightly more likely to agree.

Percentage of residents by age band who agree that new homes should be built on greenfield sites

Base: All respondents (n2000)



Landlord-Resident relationship

As the largest housing association in the country, Clarion is acutely aware that it needs to retain a local focus and deliver services well. How far residents trust and have confidence in Clarion is a key measure that can be used to understand how residents view the new merged organisation.

When Affinity Sutton residents were surveyed last year 67% agreed that they had trust and confidence in Affinity Sutton; this has now increased to 74% (+7%) in 2017. Circle residents were asked this question in December 2016 and just 57% agreed with the statement “I trust and have confidence in my landlord” but this has increased significantly to 69% this year – a 12% upsurge in just 6 months.

71%

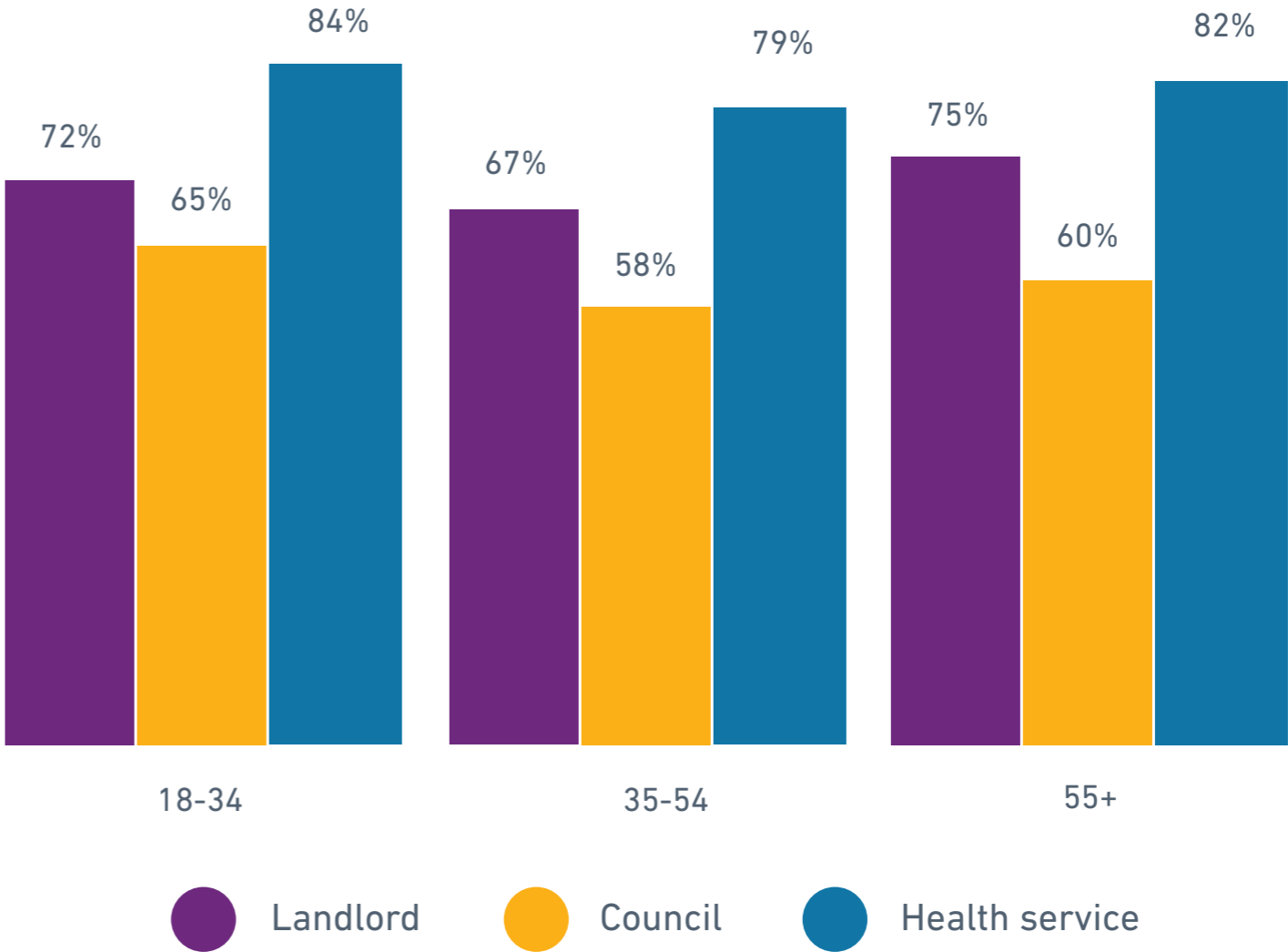
of residents agree that they have
trust and confidence in Clarion

To provide context for the findings about the extent to which Clarion is trusted, two new questions were added to this year’s survey. Rather than just looking at their relationship with their landlord, residents were asked if they have trust and confidence in the Council and their local health service. Clarion finds itself situated almost exactly in the middle of these two services with 81% of residents having confidence in the local health service and 60% having confidence in the Council.

When trust and confidence results are looked at by age, there is a similarity between this and the familiar inverse bell shaped life satisfaction curve that peaks during youth and a decreases over time before recovering again as people become older. This pattern is loosely adhered to across all three of the services but it is seen most clearly in the trust for landlord results.

Percentage of residents who agree that they have trust and confidence in their landlord, the Council and the local health service by age band

Base: All respondents (n2000)



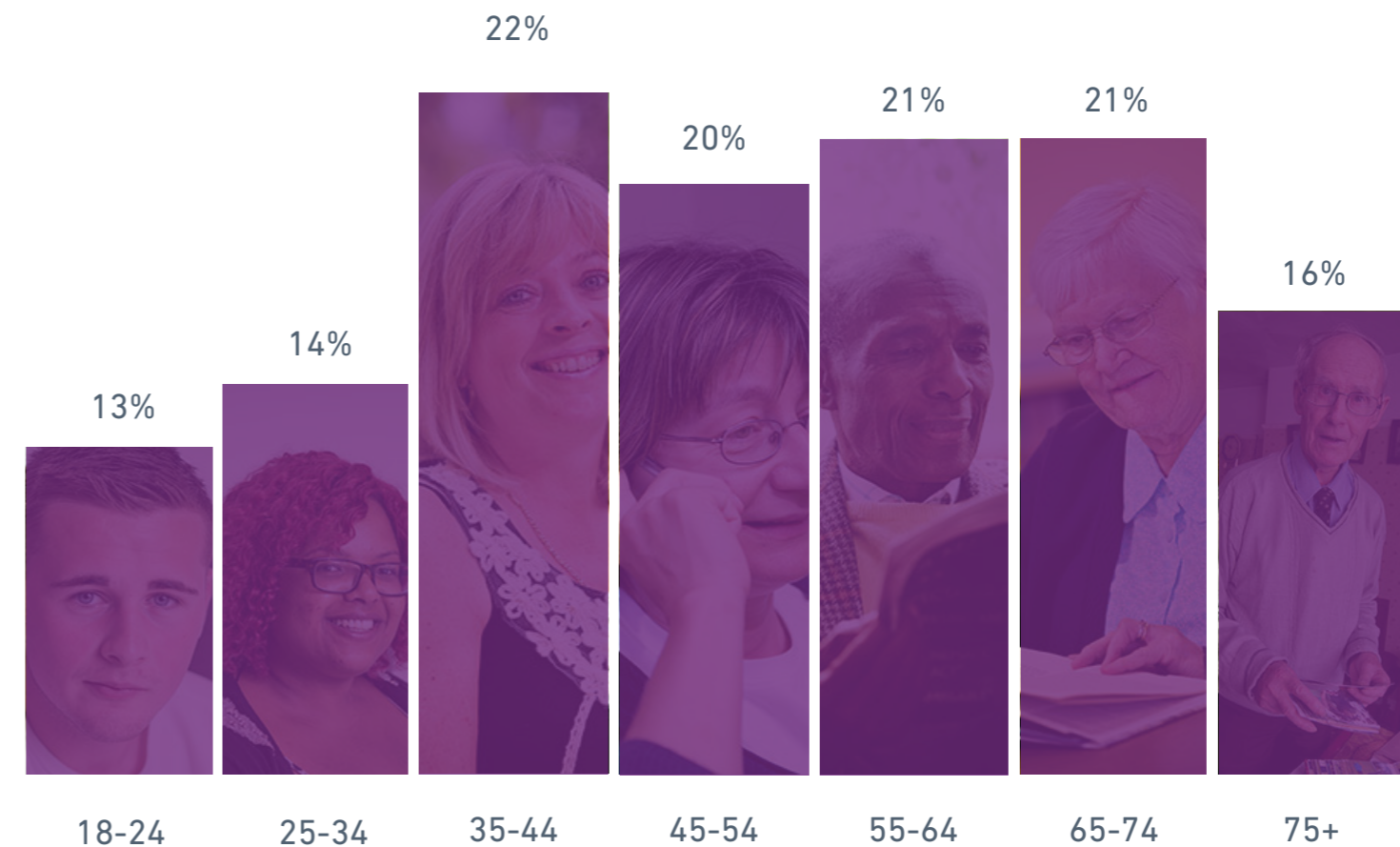
Another way the success of the merger can be measured from a resident perspective is how easy it is to access services. In 2016, 64% of Affinity Sutton residents said they found it easy to access their landlord's services and just 50% of Circle residents agreed. In 2017 both of these figures have increased significantly with 65% (+15%) of Circle residents agreeing with the statement and 75% (+11%) of Affinity Sutton residents. This progress may be driven in part by significant changes made to systems in the Circle contact centre making it easier for staff to answer residents' queries. More services are being made available online so this may also be contributing to the improved result. This is an area Clarion will want to improve, year on year.

It remains a concern that almost a fifth (19%) of residents say they find it difficult to access Clarion services despite this being an improvement on 26% last year (4% did not know). Identifying which groups are finding services harder to access and which are most difficult to use will be key to Clarion addressing this. Follow-up research and service development may be needed.

Percentage of residents who find it difficult to access Clarion services by age band

Base: All respondents (n2000)

The chart shows how experience of accessing services varies with age. Those aged 35-74 find it most difficult with the youngest and oldest residents least likely to have difficulty. This might be linked to these groups being in work and juggling family responsibilities as those in part-time work were most likely to find services difficult to access; this group may require a more flexible out of hours service than is currently offered. Only 9% of those living in supported or sheltered units say they find services difficult to access and this holds the figure down for the 75+ age group as they will tend to have on site staff.



Digital Inclusion

Having a digitally literate customer base has clear benefits to any business as transactions can be made quicker and communications can be smarter and much more cost effective. For a business for social purpose such as Clarion, these efficiencies mean that more resources can be made available to support residents and build more homes to tackle the housing crisis.

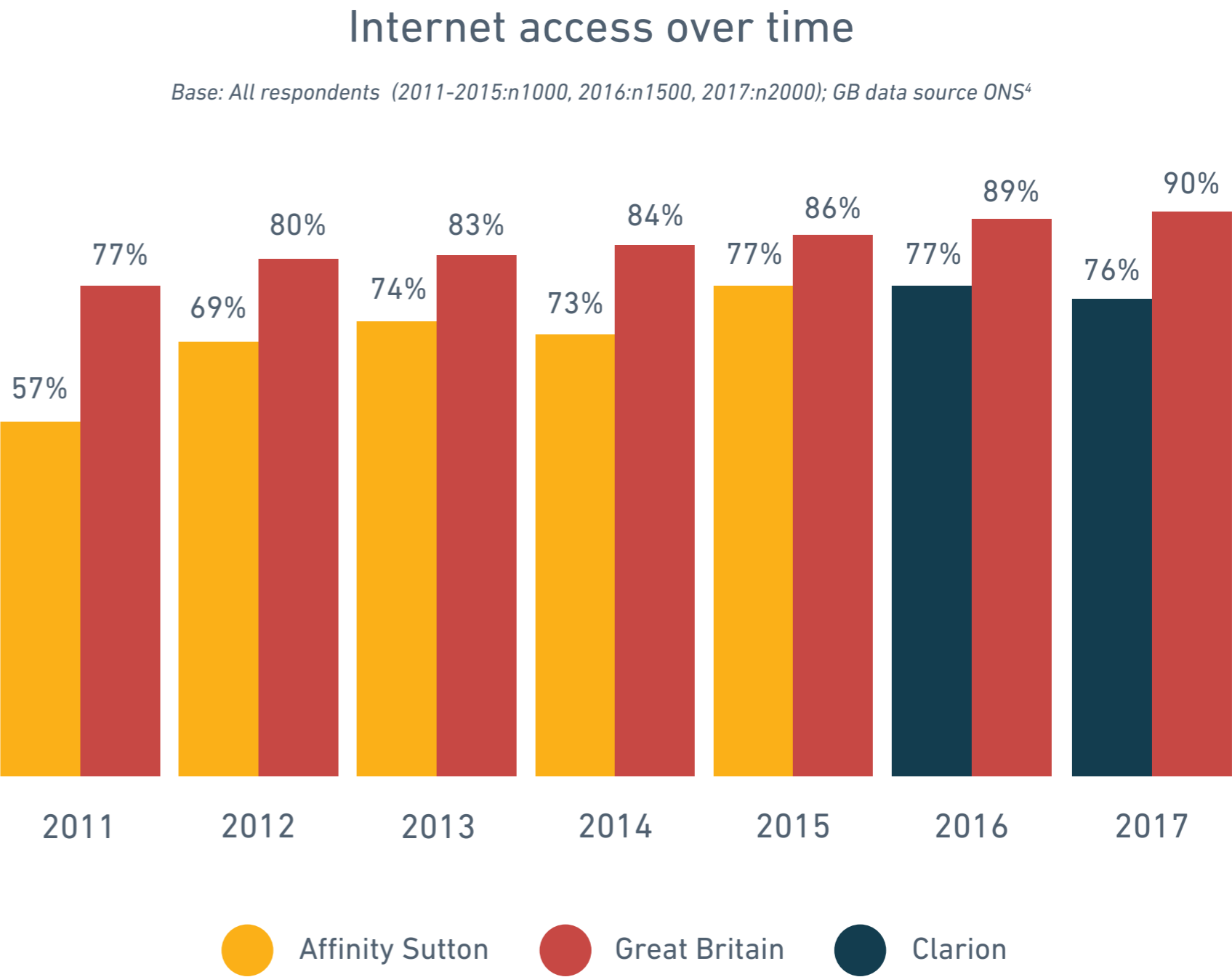
There is also significant social value attached to being online with money saving deals and improved wellbeing resulting from the ability to connect with family and friends. Clarion wants every resident who wishes to get online to enjoy the benefits of being connected and digital inclusion is a key mechanism for delivering social value. The Clarion Futures programme provides residents with the skills to use the internet to enhance their lives by saving money, accessing benefits and connecting with other people.

76%

of Clarion residents have access
to the internet

Since 2011, when just 57% of Affinity Sutton residents were online, the yearly increase and subsequent plateau of residents online has tracked the national picture to a large extent. However, in the last two years progress among residents has fallen a little behind the national digital usage statistics, which continue to increase slowly. Clarion’s digital inclusion team will work to address the barriers to being online to ensure that residents do not get left behind. Among those not online, a lack of ability (43%) or inclination (47%) were the main reasons given for not accessing the internet.

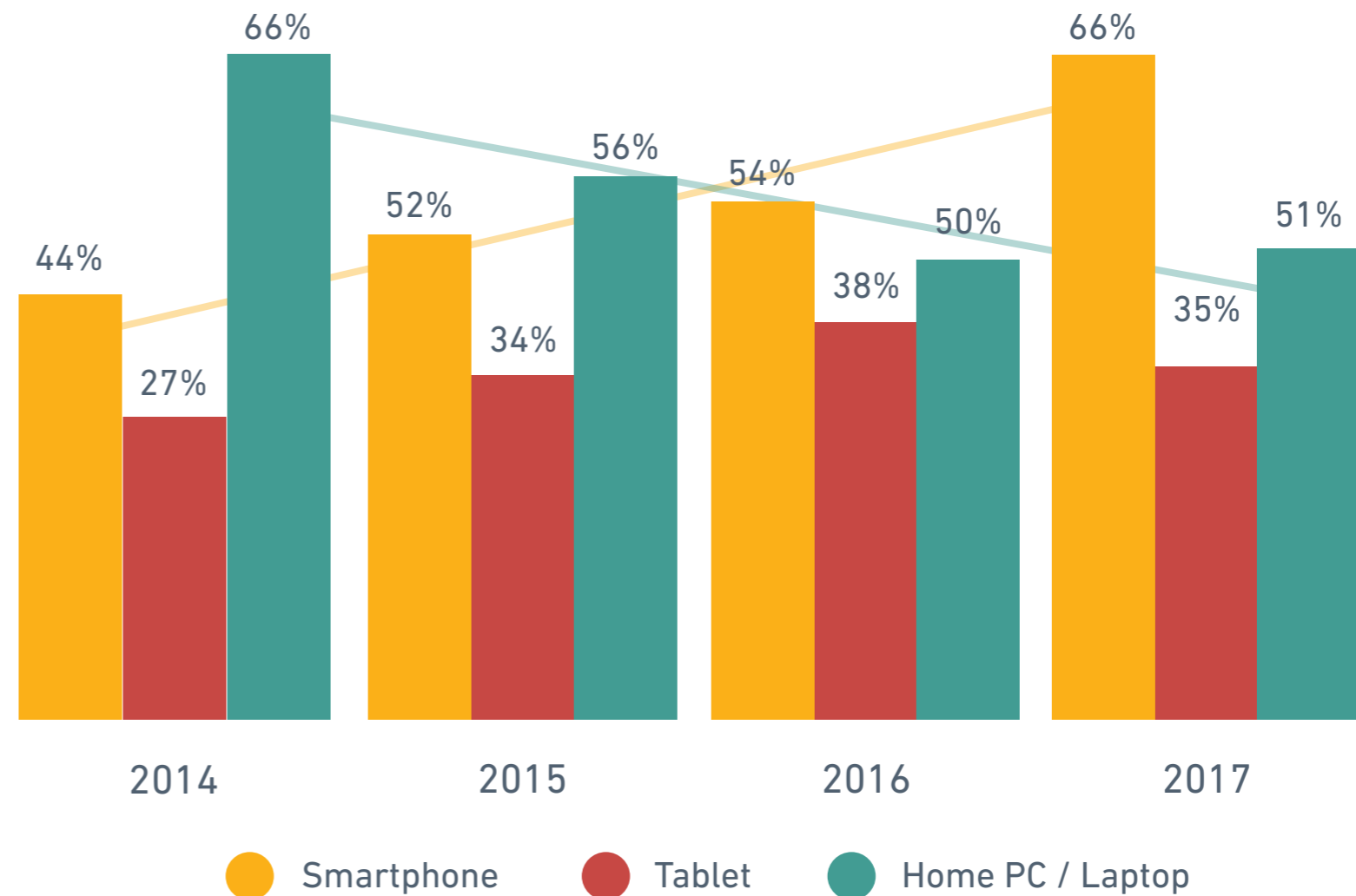
There is a small difference between the proportion of Circle residents (74%) who are online and Affinity Sutton (78%) but no difference in how confident these users are.



As access to the internet has levelled off among residents, another trend is evident in these results. There has been a steady rise in the proportion of residents using smartphones to get online and we see a corresponding decline in access via home PC or laptop. In previous years we also saw a small but steady increase in the use of tablets but this too has started to drop off. This shift may be a result of smartphone handsets becoming more affordable and is certainly youth-driven. In 2016, 88% of 18-34 year old residents said they accessed the internet on their phone, which this year has increased to 91% and this rises to 94% among 18-24 year olds.

Access to the internet via smartphone, tablet and home PC or laptop with trend lines

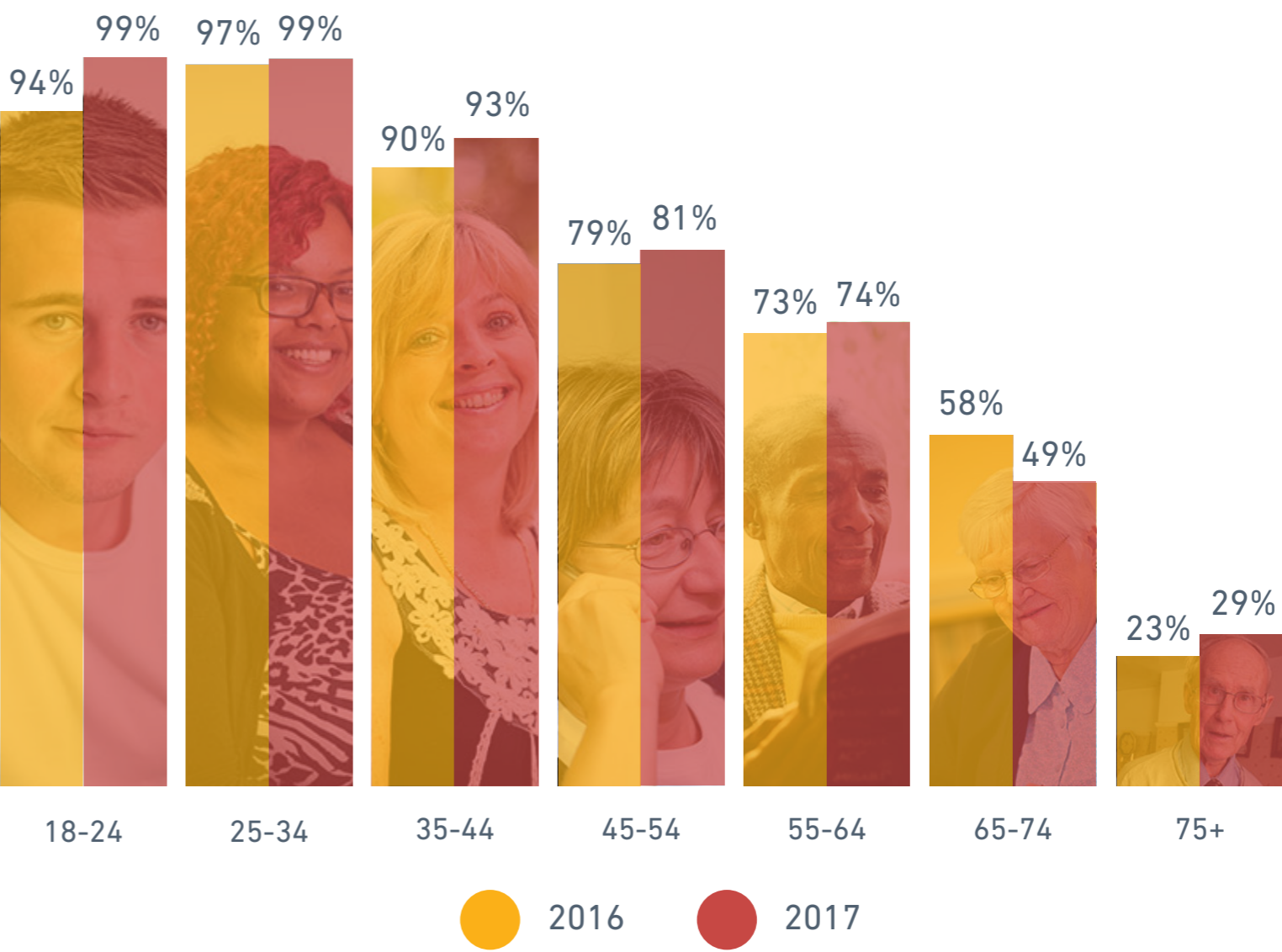
Base: All respondents with internet access (2014:n711, 2015:n749, 2016:n747, 2017:n1518)



Young residents continue to lead the migration online as the most connected sub-group of residents. In 2016, we saw a significant drop in the proportion of 45-54 year olds online and a similar sized increase in the percentage of those aged 65-74. At the time it was unclear whether this was a shift in trend or a statistical anomaly, but this year's results indicate that it was likely to be a sampling effect rather than a genuine change; in 2017 the proportion of every age group online increased except for those aged 65-74 who have returned to their pre-2016 level of 49%.

Internet access by age and year

Base: All respondents (2017:n2000, 2016:n1000)



Employment

The proportion of residents in work at 40% is slightly lower than last year (-4%), but the level of unemployment among residents has remained static at 6.4% whereas nationally it has fallen from 4.9% to 4.4%⁵. An aging population within the merged organisation may account for this to a large extent as those who are retired from work have increased from 19% in 2016 to 24% in 2017.

Among working age residents (18-64) more than half (51%) are in work and there has been no statistically significant change in this figure since the 2016 Affinity Sutton survey. Over two thirds (64%) of those in employment work full-time and 36% work part-time. This is consistent with the findings of the Peabody report⁶ which highlighted the significant economic contribution of social renters.

40%

of residents are in paid work and
this increases to 51% of working
age residents

Among those in work, part-time work is most common among those with children at home with 47% doing fewer than 30 hours a week. Although the same proportion of men and women are in paid work (40%), women are significantly more likely to work part time than male residents and they are also more likely to be engaged in looking after the home and children; only 1% of male residents do this compared to 7% of women.

A higher proportion of men are retired than female residents and at 29% this is an increase of 12% since the Affinity Sutton survey in 2016. Further analysis is required to understand how far the combined demographics of the new housing association may be driving this and how much might be attributed to the sampling process.

Employment status by gender

Base: All respondents (n2000)

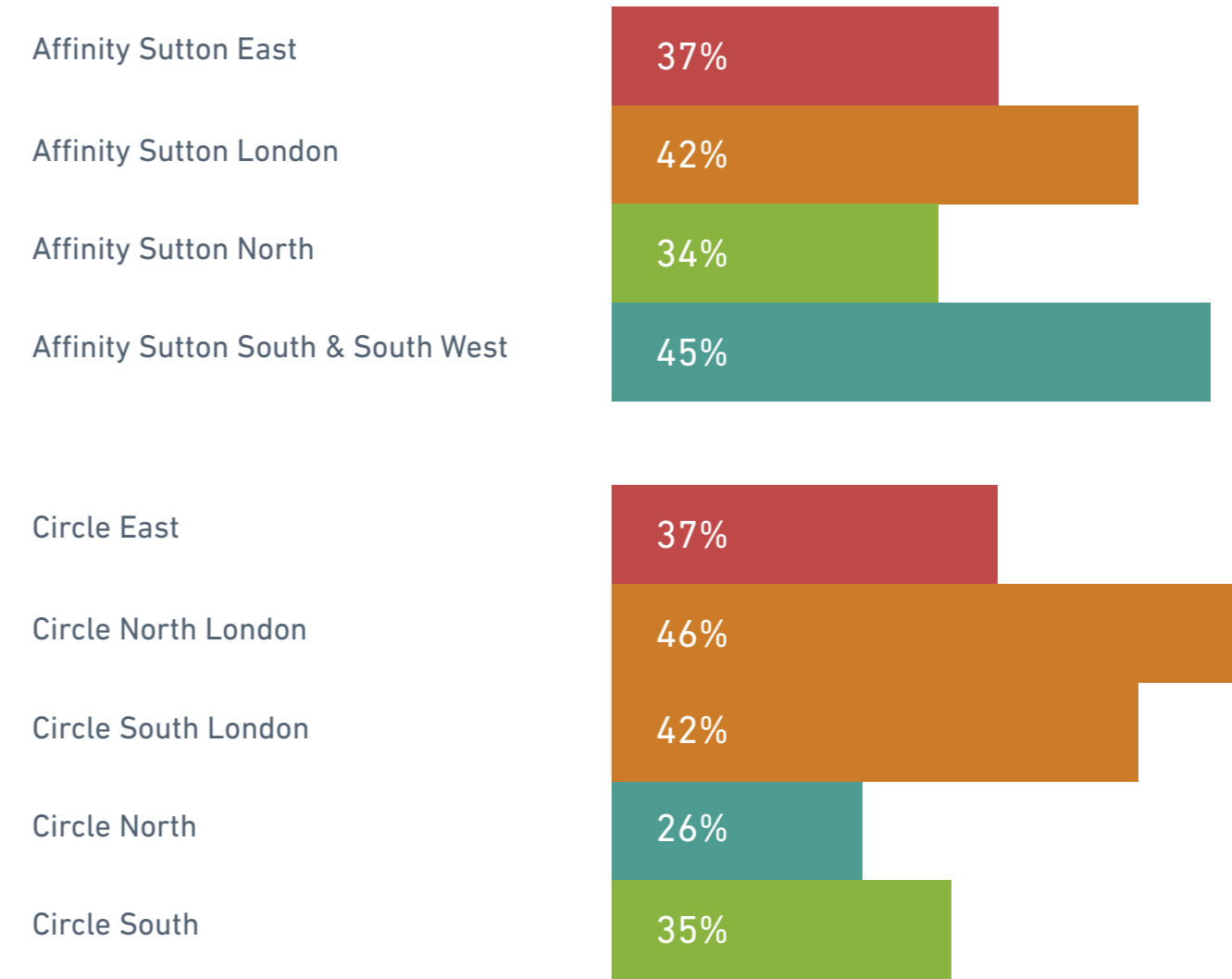
Employment status	Male	Female
Working - Full time	33%	21%
Working - Part time	7%	18%
Full-time education at school, college or university	<1%	<1%
Disabled or long term illness	18%	15%
Retired	29%	21%
Carer	3%	7%
Looking after the home (includes caring for children)	1%	7%
Unemployed / looking for work	7%	6%

Paid employment varies quite significantly across operating regions and as in previous years the lower levels tend to be seen outside of London and the South. This cannot be entirely explained away by the age demographic although it no doubt pays a part, as there is a slightly younger customer base in London and fewer retirees.

The chart below highlights the anomalous finding that just 35% of those in the Circle South operating region are in paid work. In this case the sample profiled may contribute to this slightly unexpected result, as a significantly higher proportion of over 65s were surveyed in this area than in the Affinity Sutton South and South West regions. This means that the chart underplays the proportion of working age Circle households in the South who are employed and is a result of demographic differences and legacy regional reporting. This is one of the very few examples where differences have been found between Circle and Affinity Sutton residents and this may disappear in future reports when regions are consolidated.

Paid employment by region

Base: All respondents (n2000)



Community

Clarion understands the importance of community and neighbourhood for personal wellbeing and Clarion's community foundation, Clarion Futures, invests £10 million a year to improve the lives of residents and the communities where they live. Through local projects, Clarion Futures works in partnership with residents and the wider community to positively shape their estate or neighbourhood.

The HACT Social Value Bank⁷ is used to help measure the social impact of this work and attribute monetary values to particular outcomes. Feeling in control has one of the highest HACT social values attached to it - equivalent to £12,470 p.a. per person - and the majority of residents say they feel in control of what happens in their life.

83%

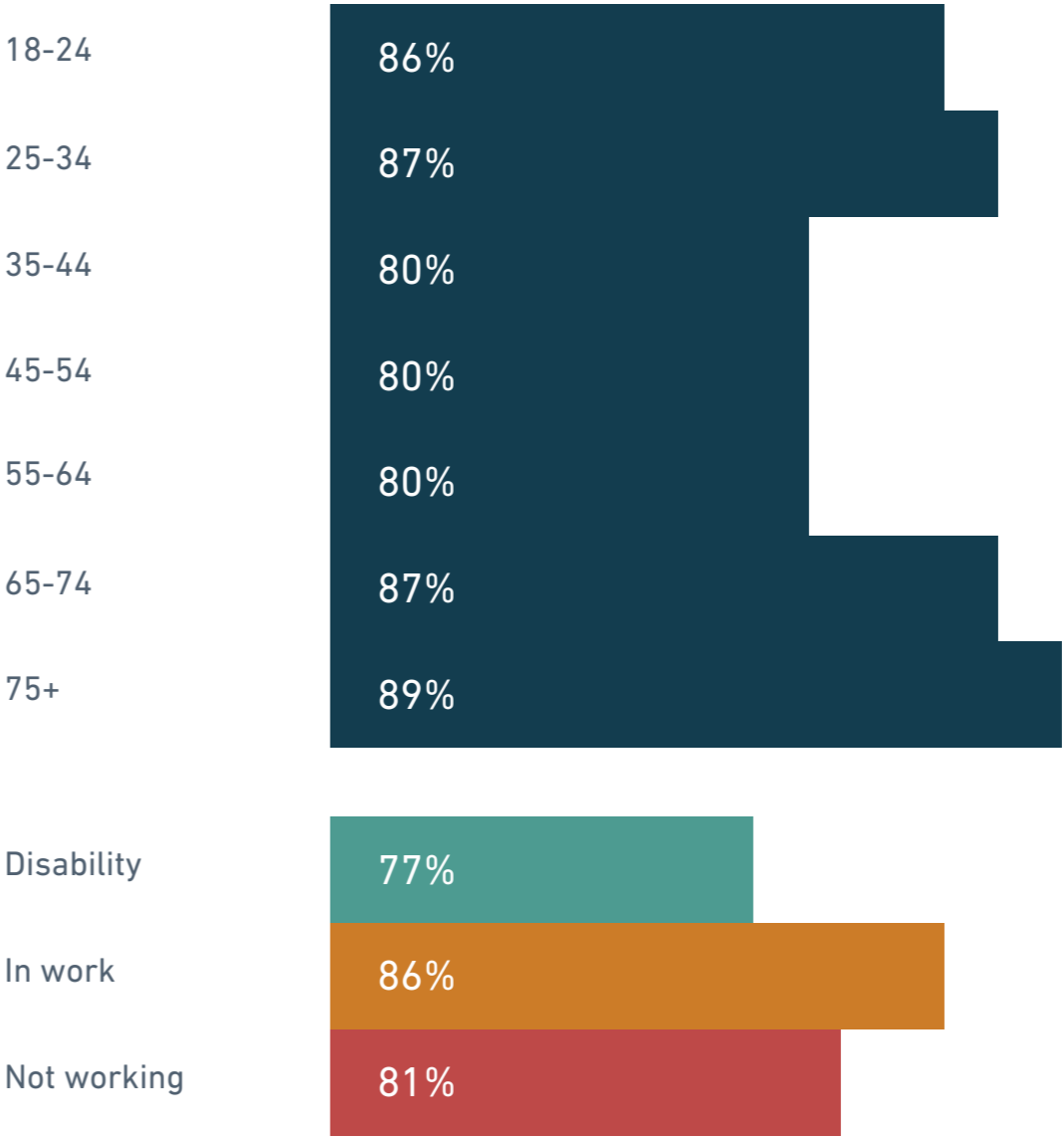
of residents agree with the statement "I feel in control of what happens in my life"

Only 77% of long-term ill or disabled residents⁸ agreed that they feel in control of what happens in their life and this remains a concern. Considering other demographics, there is no variation in responses by gender or by whether there are children living in the household. However people aged 35-64 – those sandwiched between the baby-boomers and millennials – are less likely to feel in control than those in both the older and younger age bands. This is consistent with findings from last year. Welfare reforms have continued to impact on working age households which may help to explain the pick up after 65 years. There is also a link between feeling in control and employment, with those in work more likely to say they feel in control than those not working.

Feeling in control is a key driver of wellbeing so will be important for Clarion to work with those groups less likely to feel in control to help find ways for them to increase the influence they have over decisions that affect them.

Percentage of residents who agree that they feel in control of what happens in their life by key demographic

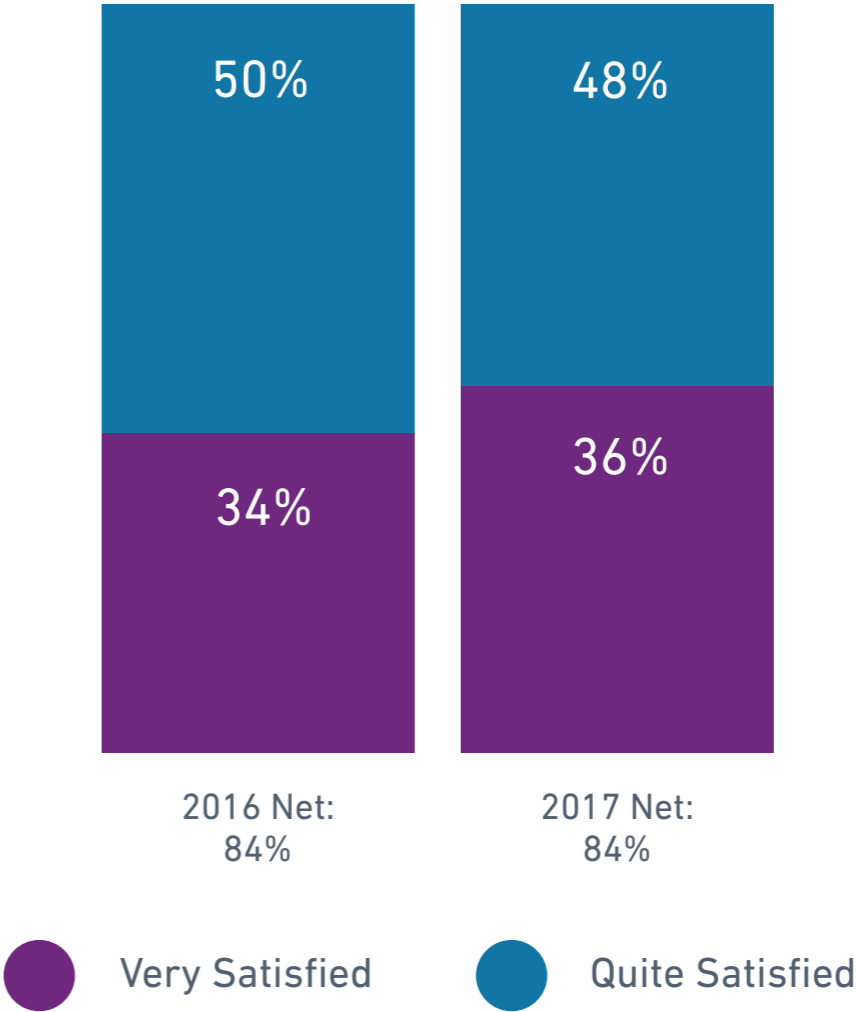
Base: All respondents (n2000)



While it is essential that Clarion maintains homes and delivers housing services to residents, the wider environment in which they live is just as important and a sense of belonging in one’s neighbourhood has a HACT wellbeing value of £3,753 p.a. per person. 82% of Clarion residents agree that they feel that they belong in their neighbourhood and a significant majority (83%) also say they think their neighbourhood is a good place to live. The overall finding that 84% of residents are satisfied or very satisfied with their neighbourhood is the same as last year but there has been a slight increase in the proportion saying they are very satisfied.

Satisfaction with neighbourhood by year

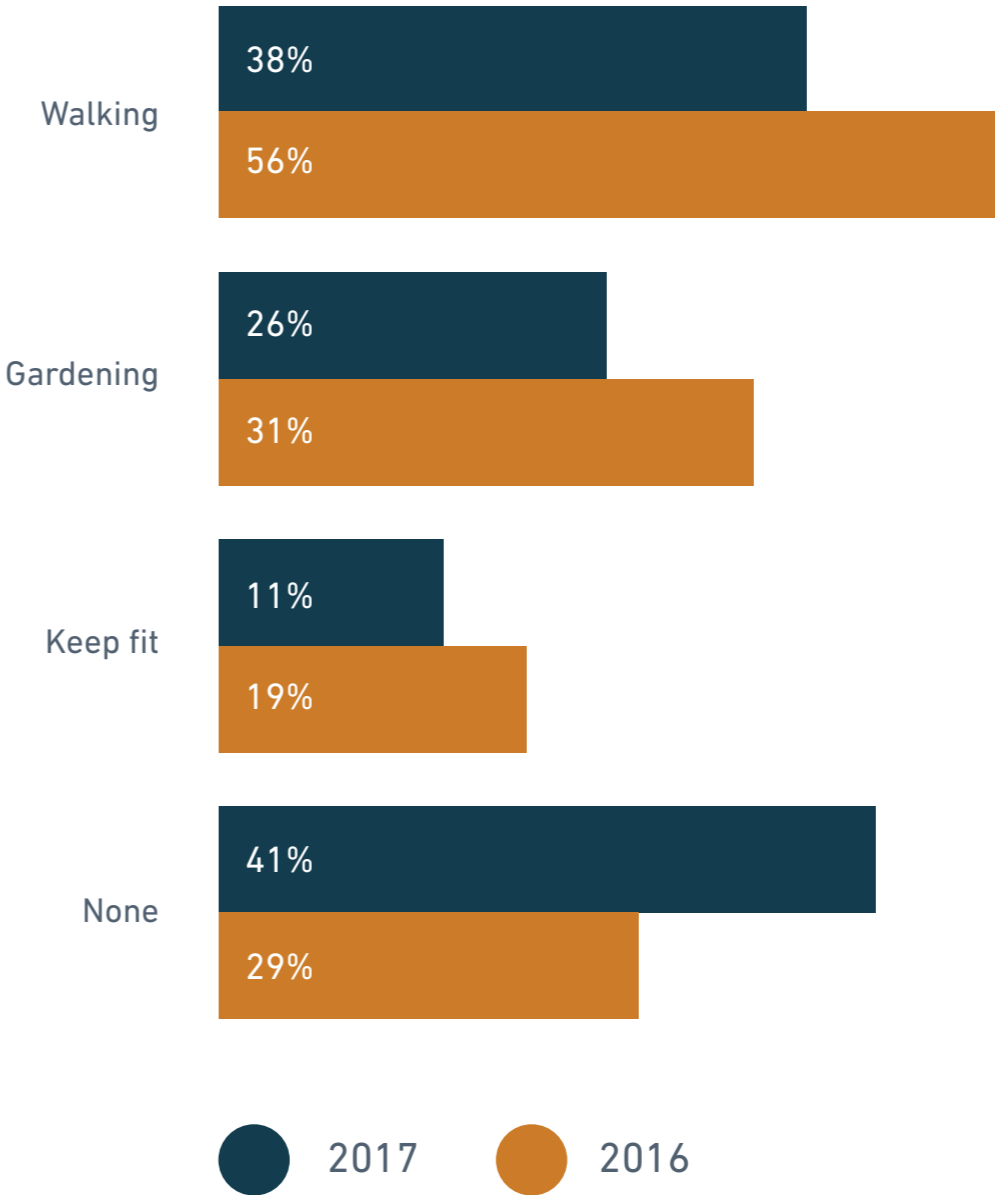
Base: All respondents (2017:n2000, 2016:n1000)



Taking part in physical activity contributes positively towards personal wellbeing and the Clarion Futures team encourages this through targeted interventions such as installing outdoor gyms and commissioning dance classes and exercise sessions. In previous years residents have reported fairly high levels of activity with fewer than a third (29%) last year saying they do not do any of the activities listed in the survey. This year however inactivity has increased significantly and two in five (41%) of residents now say they do not do any activities. This drop in the proportion of active residents cannot be attributed to financial constraints because the free activity of walking has seen the greatest reduction from 56% in 2016 to just 38% in 2017 (-18%). Further analysis and qualitative research will be needed to better understand this result particularly as it complements the Public Health England study.

Proportion of residents who take part in activities

Base: All respondents (2017:n2000, 2016:1500)



Household Finances

As welfare reforms continue to be implemented and preparations are in place for the full roll-out of Universal Credit it is more important than ever that residents know where to turn if household finances become stretched. Clarion provides a wide range of financial inclusion services from access to loans and banking to money management. Together these aim to help residents maximise their income and manage their finances without having to depend on expensive credit.

Only 46% of Clarion residents said they knew about the money guidance service compared to 53% of Affinity Sutton residents last year when there had been a 10% increase on the 2015 figure following a comprehensive communications campaign. The fall this year cannot be credited to Circle residents skewing the figure as there was no statistically significant difference between the housing association results (46% AS; 45% Circle). This highlights the importance of constant targeted communications in this area as the boost provided in 2016 has largely dropped off.

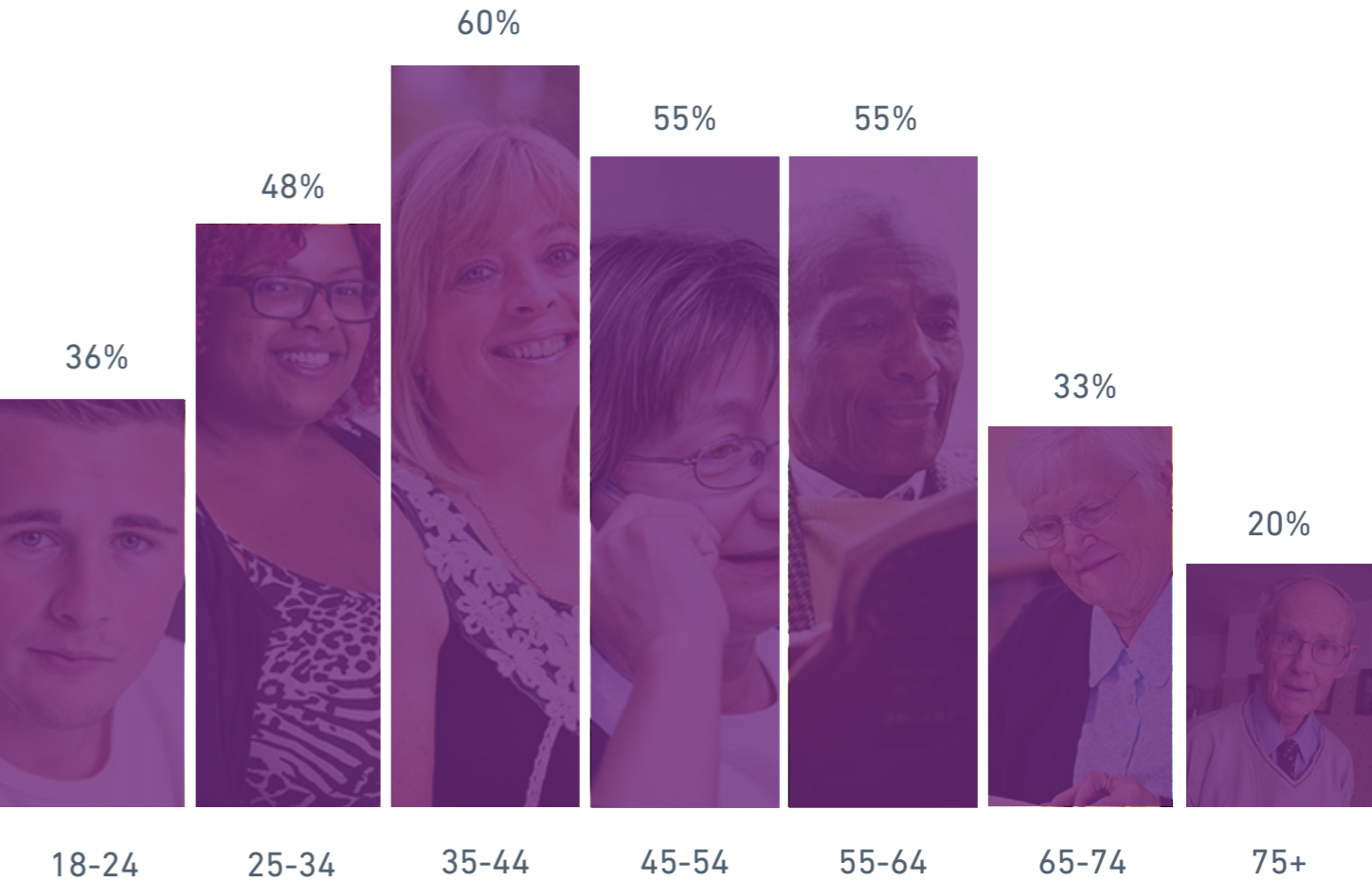
46%

of residents are aware that
Clarion offers guidance to help
them manage their money

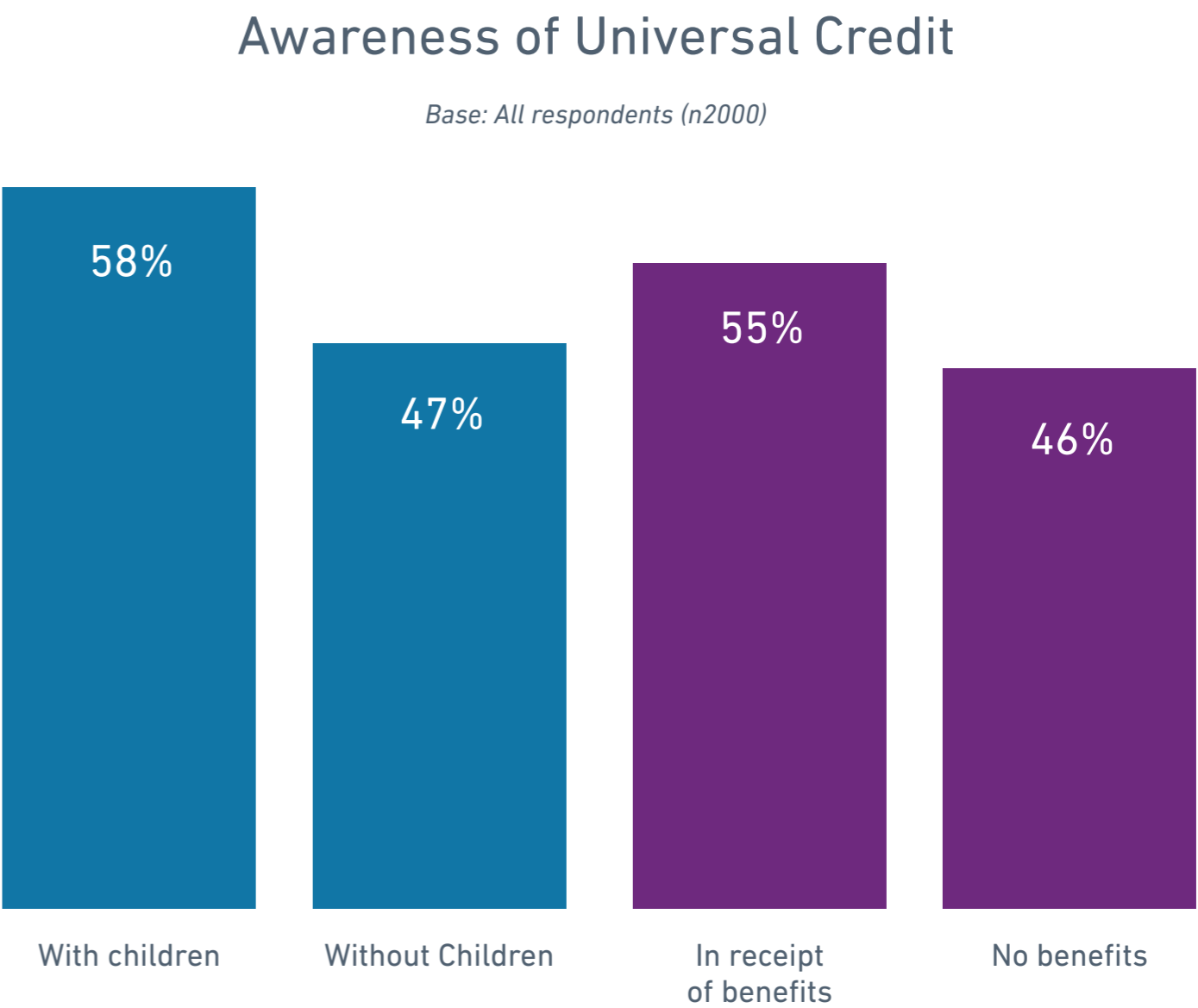
Almost half of Clarion residents are worried about money (47%). There is no statistically significant difference between those who are working and those who are not but those with children living at home are far more likely to worry about money (55%) than those without (43%). Those with a long-standing health issue or disability are also more likely to worry (52%) than those without (43%). Women are also more likely to worry about money issues (50%) than men (43%). In the same pattern as last year, when looked at by age band, it is clear that those of working age are much more worried about money issues than the over 65's. This is a consistent outcome from the working age focus of government welfare cuts.

Proportion of residents worried about money issues by age band

Base: All respondents (n2000)



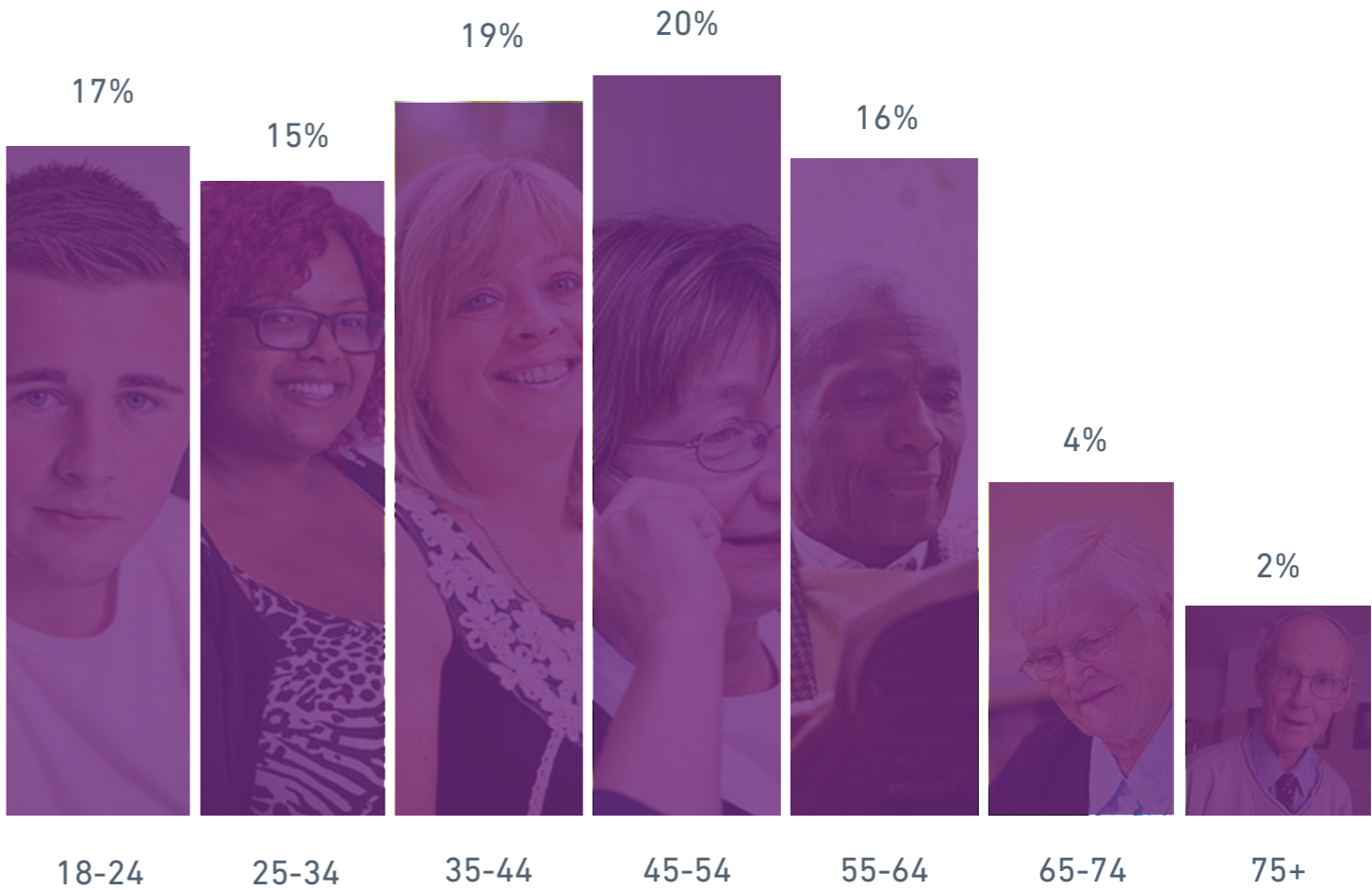
Universal Credit represents a challenge as it is replacing a number of weekly paid benefits – including Housing Benefit - with a single monthly sum paid in arrears to an individual household member. This means that households being moved to Universal Credit need to have saved up enough money to carry them through the first six weeks when no payment is made. This can be very difficult for those on low incomes and requires a good deal of forward planning to avoid hardship. With the national roll-out imminent it is troubling that only 55% of residents in receipt of benefits (n1277) said they were aware of the introduction of Universal Credit. This has fallen slightly since last year (57%, n1022).



When money is tight, households cut back on various non-essentials and may buy fewer luxuries; but when someone goes without food to save money, it is the sign of a serious situation. There has been a decrease (-5%) in the proportion of Clarion residents who went without food to save money since last year (19%), but 14% is still too high. An easy assumption to make is that those going without food will be the elderly or will be parents going without to feed their children. However, this is not the case as only 3% of those receiving state pension said they had gone without food and there is no statistically significant difference in results from those with, or without, children at home. Like other areas of financial worry, the age demographic of those who have gone without food is tightly correlated to where welfare reform is targeted.

Percentage of residents who have gone without food to save money by age band

Base: All respondents (n2000)

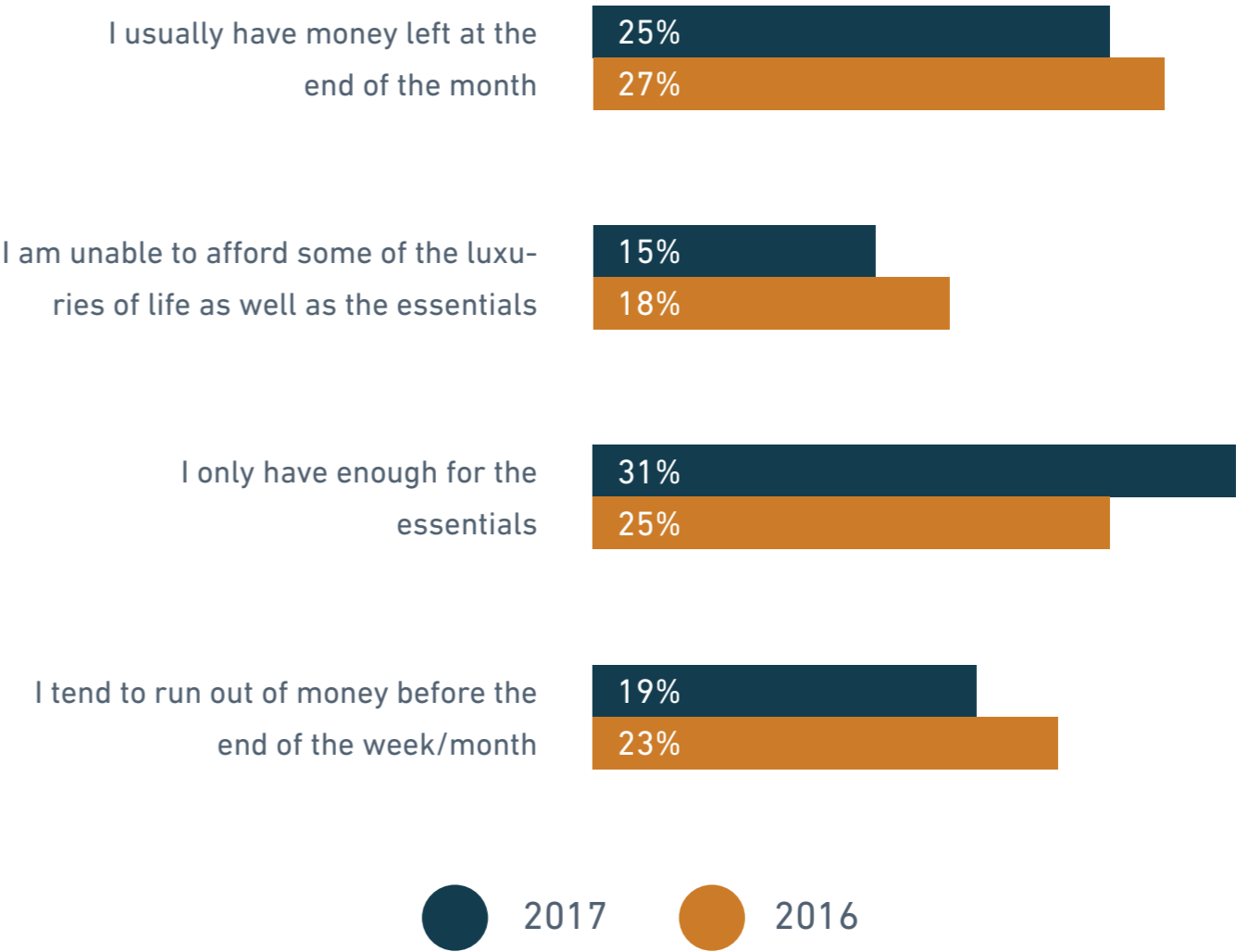


The proportion of residents who tend to run out of money before the end of the week/month has decreased since 2016, driven by an increase in the percentage who say they have enough only for the essentials. Given the lack of movement on employment rates among Clarion residents and the increasingly constrained benefit landscape, this would suggest that residents are budgeting carefully and are managing to do more with less.

The 35-54 age group remains slightly less likely to have money left at the end of the week/month (21%) than 18-34 (26%) and 55+ (28%). This is likely to be partly driven by this group being more likely to have children in the home as 25% of those with children run out of money before the end of the week/month, compared to just 16% of those without children at home.

Resident financial experience

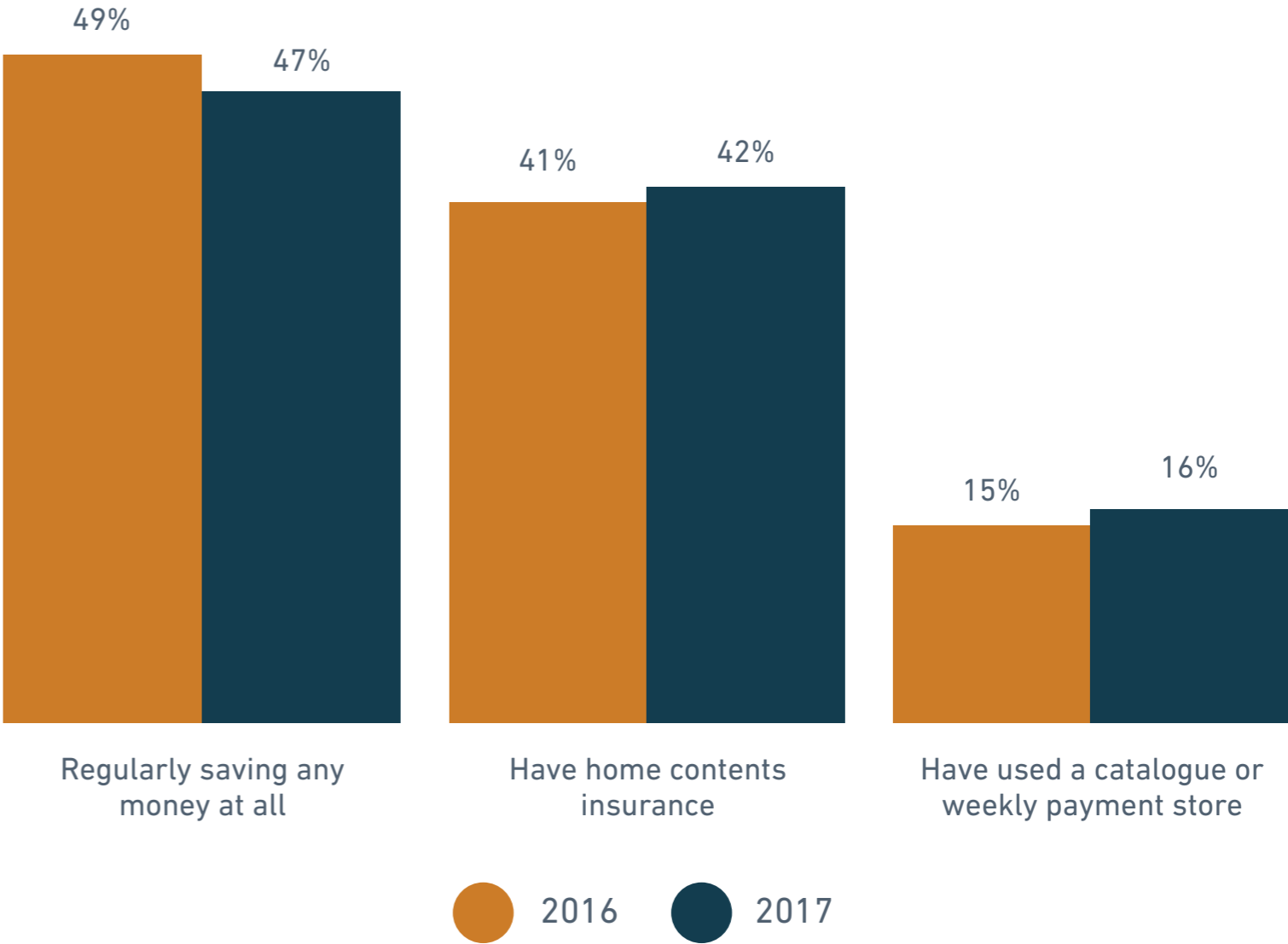
Base: All respondents (2016:n1500, 2017:n2000)



With the exception of the 5% reduction in those going without food to save money in the past year, there has been no statistically significant change across most credit and spending related measures this year. The same percentage (5%) of Clarion residents used a quick cash loan or cash converters as last year and 16% used a catalogue or weekly payment store compared to 15% in 2016. The percentage of households saving money has decreased slightly from 47% to 49% this year following increases in previous years (45% in 2015).

Resident saving and spending, by year

Base: All respondents (2016:n1500, 2017:n2000)



Communications

Increasingly, residents expect to be able to communicate with their landlord using a variety of channels for different purposes. As Clarion grows, the efficiencies created by moving more communications online increase and savings made can be used to deliver new homes and invest in communities. Given that nearly a quarter (24%) of residents do not use the internet, Clarion cannot move all communications online immediately but there are opportunities to target specific activities and encourage particular resident groups to transact online.

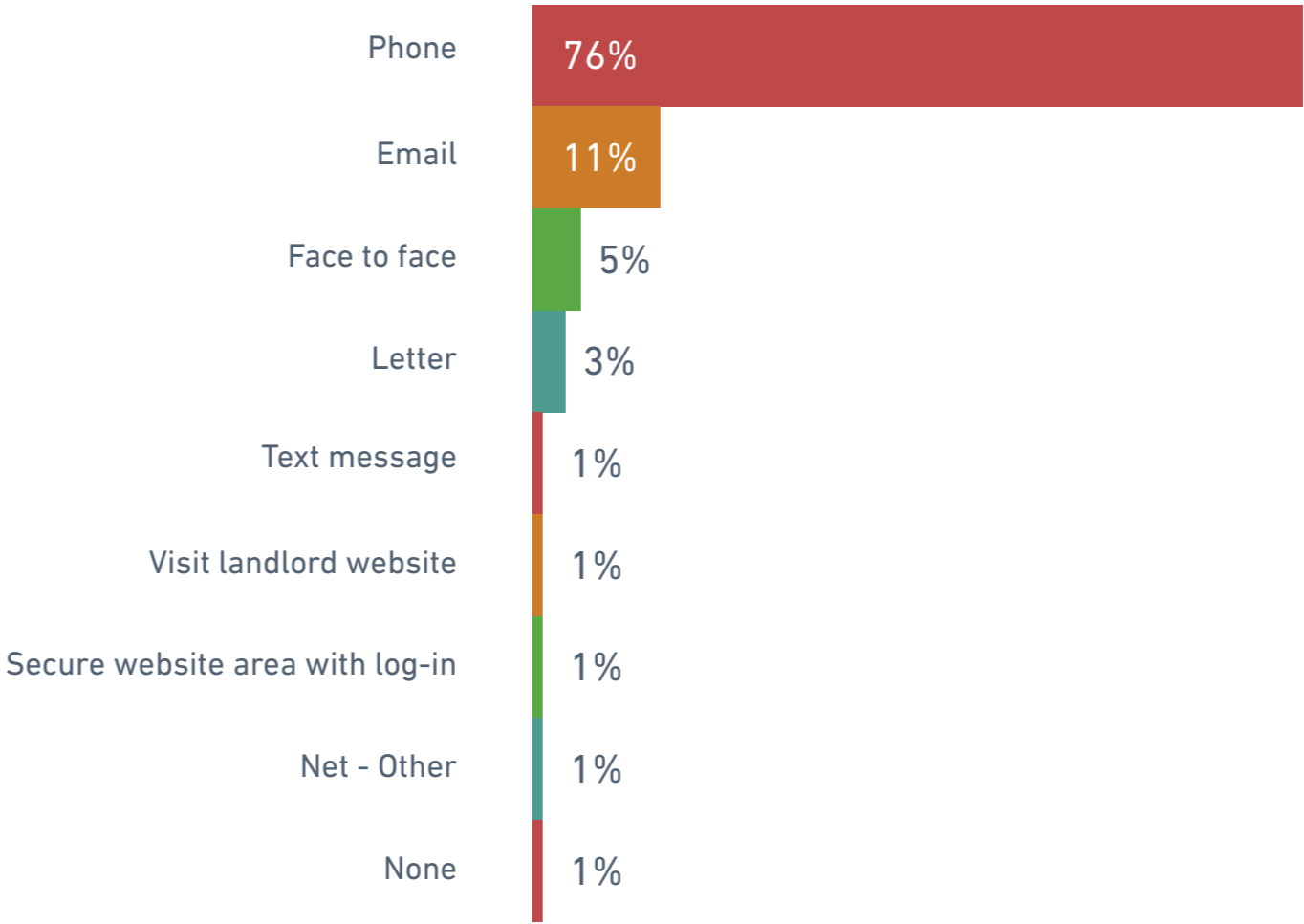
71%

of Clarion residents knew they could report an repair or pay their rent online or had heard of the online portal

Despite the majority of Clarion residents having access to the internet there are some transactions where telephone contact is preferred. If there is a problem with their rent payment, 61% of residents say they would prefer to be contacted by phone whereas only 10% would like to receive an email and 8% a text. If they need to make a complaint, residents are even more likely to prefer to use the telephone with 76% of residents citing this as their preference, although there has been a small increase in email as a preference from 8% last year to 11% in 2017. The immediacy and personal touch of telephone means that it is likely to remain a favourite communication channel for dealing with some issues until digital services such as web-chat advance to mimic this effectively.

Preferred communication channel for making a complaint (single choice, unprompted)

Base: All respondents (n2000)



Energy

Residents are exerting control over their finances with 38% having switched energy provider and 19% having done so in the past year. This compares favourably with national statistics that show 16% of UK households switched electricity provider and 15% switched gas supplier in 2016⁹. Perhaps unsurprisingly, those with access to the internet were more likely (42%) to have switched energy provider than those without (23%). Because some Clarion buildings have communal heating, switching is not an option for everyone. Next year's survey can include this information to provide a clearer picture of how many residents who are able to switch are doing so.

Residents on low incomes disproportionately feel the impact of energy price increases and this year 19% of Affinity Sutton residents said they had gone without heating to save money in the past 2 years. This is even higher for residents with health problems.

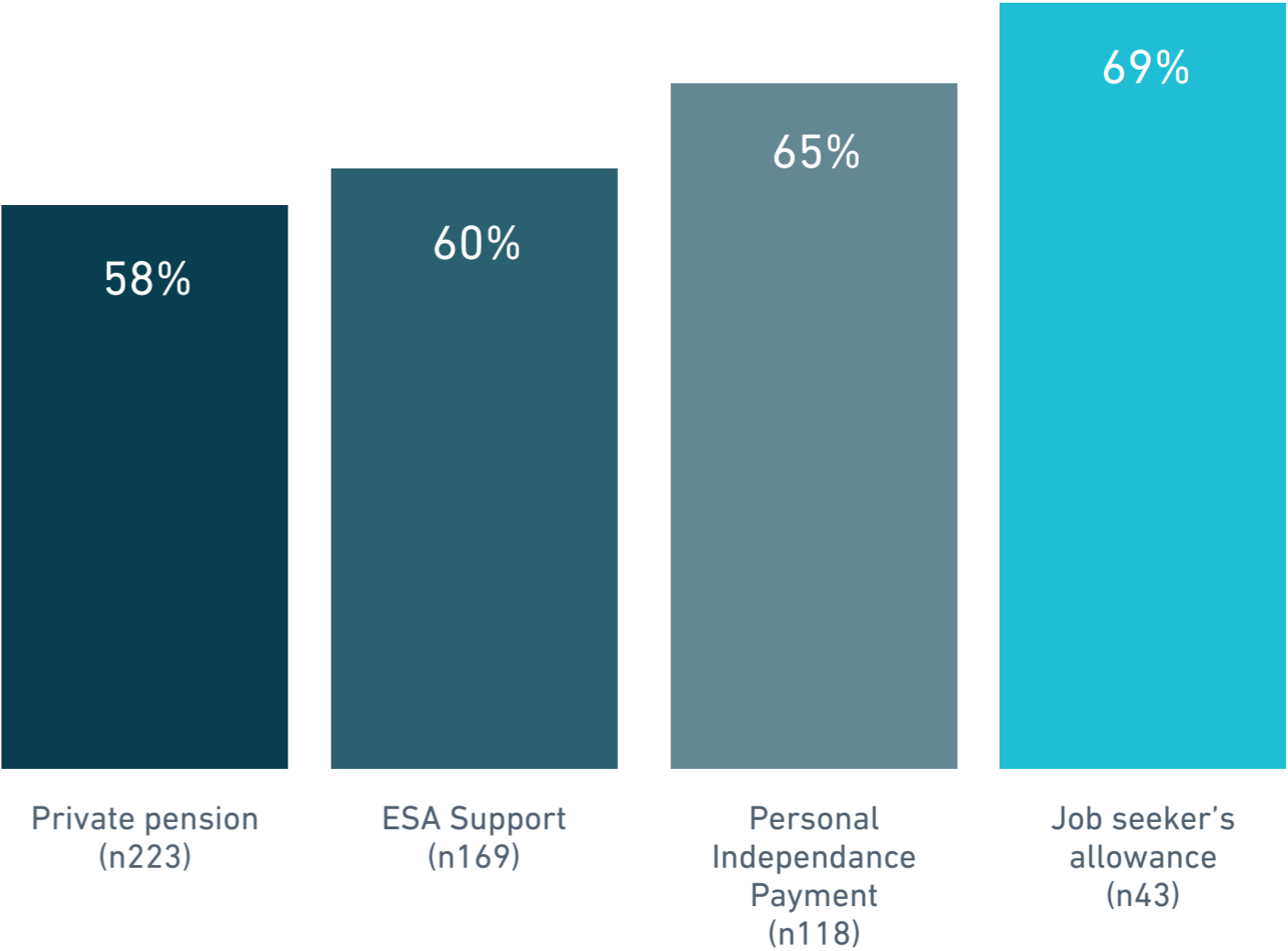
24%

of residents with a disability of
long term health issue went
without heating to save money in
the past 2 years

As in previous years, more residents are anxious specifically about rising energy costs (56%) than they are about money issues generally (47%). The age group most worried about rising energy bills are those aged 55-64 (62%) as they approach retirement age. It is likely that this is linked to them thinking ahead, as they will tend to be on a fixed income after retirement so increasing energy costs present a real issue. Concern about rising energy costs is felt across all resident groups but those in receipt of benefits are significantly more likely to be worried than those not receiving any. Concern about rising energy costs is felt across all resident groups but those in receipt of benefits are significantly more likely to be worried than those not receiving any.

Proportion of residents worried about increasing energy bills, by benefits received

Base: All respondents (n2000)



A woman with long dark hair is smiling and holding a telephone receiver to her ear. The image is overlaid with a semi-transparent blue filter.

Methodology

Market Research Society registered, Enventure Research was commissioned to undertake this year's resident survey with randomised customer contact details provided by Clarion. A similar methodology was used to the Affinity Sutton surveys of previous years and telephone interviews were carried out with a representative sample of 2,000 residents. Quotas were used for age, gender and region as well as Housing Association. All calls were completed between 9 June and 12 July 2017. and 11 July 2016.

The questionnaire design replicated the order that similar questions had appeared in previous years to ensure results were comparable and it was timed to be no more than 15 minutes long to prevent incomplete interviews. To ensure the survey was as inclusive as possible, calls were made at different times of day including evenings and weekends. Where Affinity Sutton resident data from 2012 and 2013 is cited the source is DJS Research Ltd, where figures for 2014-16 and 2011 are used the source is Qa Research Ltd.

Kathy Ellis

Research and Customer Insight Manager

References

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In this survey 43% of Clarion residents (n854 in survey sample) reported having a disability or long standing health problem

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BEIS Quarterly domestic energy switching statistics Table 2.7.1
<https://www.gov.uk/government/statistical-data- sets/quarterly-domestic- energy-switching-statistics>
(Accessed 31/10/17)



Acknowledgements and previous reports

Clarion would like to thank all residents who participated in this survey and made this report possible. Full references to other sources cited in this report can be found on the digital version available on the [Clarion website](#).

Past Index reports

2016: <http://www.affinitysutton.com/digital-index-2016>

2015: <http://www.affinitysutton.com/digital-index-2015>

2014: <http://www.affinitysutton.com/media/808993/theindex2014.pdf>

2013: http://www.affinitysutton.com/media/808989/the_index_2013_.pdf

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