

Our findings highlight that customers still value human interactions, so we need to think carefully as we digitise services and make sure we recognise where people are better suited to deal with certain issues than algorithms.

In 2018 well over half of our residents (57%) said they used the internet several times a day, an increase of 10% on the year before (47%). This year, 60% of residents would fall in to this category, but we're able to separate out those really high users. And we see that 13% of residents (16% of internet users) get online several times an hour. About half of these high frequency users (49%) are aged under 35 and the vast majority primarily use their smartphones, so designing digital services with these users in mind is becoming increasingly important.

Just under half our residents still say they use the internet several times a day (47%), but not as much as several times an hour. 91% of residents aged 18-34 use the internet at least several times a day, compared to a quarter of those aged 55 and over (26%).

Only one in five (19%) online residents said they were not confident in using services on the internet, but this was significantly higher in residents over 55 (32%), the same as last year. As part of One Digital, Digital Champions can help improve other residents' confidence online, at the same time as developing their own skills.

How do you access the internet?

The same proportion of internet users as last year, 78%, prefer to get online using their smartphones. Although this has stayed the same, all the other methods (laptop, PC, tablet etc.) have decreased substantially, becoming less popular, even as a secondary way of getting online (Fig 20). People are focussing their internet usage on just their smartphone rather than using their phone while they are out, and a PC or laptop when at home. As more sites become mobile first, and more companies develop Apps this becomes an obvious and probably cost effective choice.

Almost all residents aged under 35 (96%) primarily use their smartphones - these are also the people most likely to get online several times an hour.

We introduced a new option to this question: smart speakers, such as Google Home or Amazon Echo. These are small speakers connected to an online virtual assistant; the user interacts with them using their voice: "Set a timer for 15 minutes", for example. Voice interfaces can be very useful to older users as they are intuitive to use without having to learn new skills, such as keyboard or mouse usage. They can also be ideal for less able users, with visual or other physical issues. There are only a handful of residents currently using these as their primary way of accessing the internet (2%). We would expect this to grow in the future, in particular as they offer a very different way of getting connected, particularly to the groups of residents least likely to be online now.

78%

of online residents use the internet on their smartphone.

Contacting us

So 81% of our residents use the internet, many of them several times through the day, and 80% of these are confident using services online. However they aren't so confident about contacting us by email or webform on our website; only half say they'd be confident of getting a response if they did so. Less than a third (29%) actually said they weren't confident of hearing back, but 21% didn't know; suggesting they weren't aware of the option, or hadn't used it.

It is important to build trust in our digital channels; design can help but we need to back that up. There is perception that digital is quicker but in reality this may not be the case. We know that our contact centres are efficient and can often resolve issues immediately, so that could be one of the reasons why residents who do everything else online, still call Clarion.

Even if residents log a repair online, hearing back from us by phone is still most popular, actually increasing since last year (from 33% to 41%). Email also increased as a preference

(from 12% to 21%) but fewer people want to hear back by text than last year (down 12% from 34% to 22%).

If there is a problem with their rent payment, 62% (down 2%) of residents say they would prefer to be contacted by phone and 12% would like to receive an email and 11% a text (both up 3% on last year). These findings highlight that customers still value human interactions, so we need to think carefully as we digitise services and make sure that we recognise where people are better suited to deal with certain issues than algorithms.

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BUILDING NEW HOMES



The impact on a person's life of having a secure, affordable home is hard to quantify, though researchers have tried: The University of Birmingham and Vivid Housing Association showed recently that living in social housing can have a positive impact on individuals lives compared to other tenures (such as private renting or owner/occupying).

For example, renting a social home is associated with a reduction in anxiety levels of 7 percentage points, all other things being equal. The research found that what really mattered to residents was feeling secure and having a degree of control over their home; two things not typically offered by the unregulated private rented sector.

Our survey found that our many of our residents are aware of social housing's importance on a more fundamental level. Although Clarion residents are keen for new homes to be built in their area, in particular they want to see more social rented homes, extending the availability of secure, affordable housing to others.

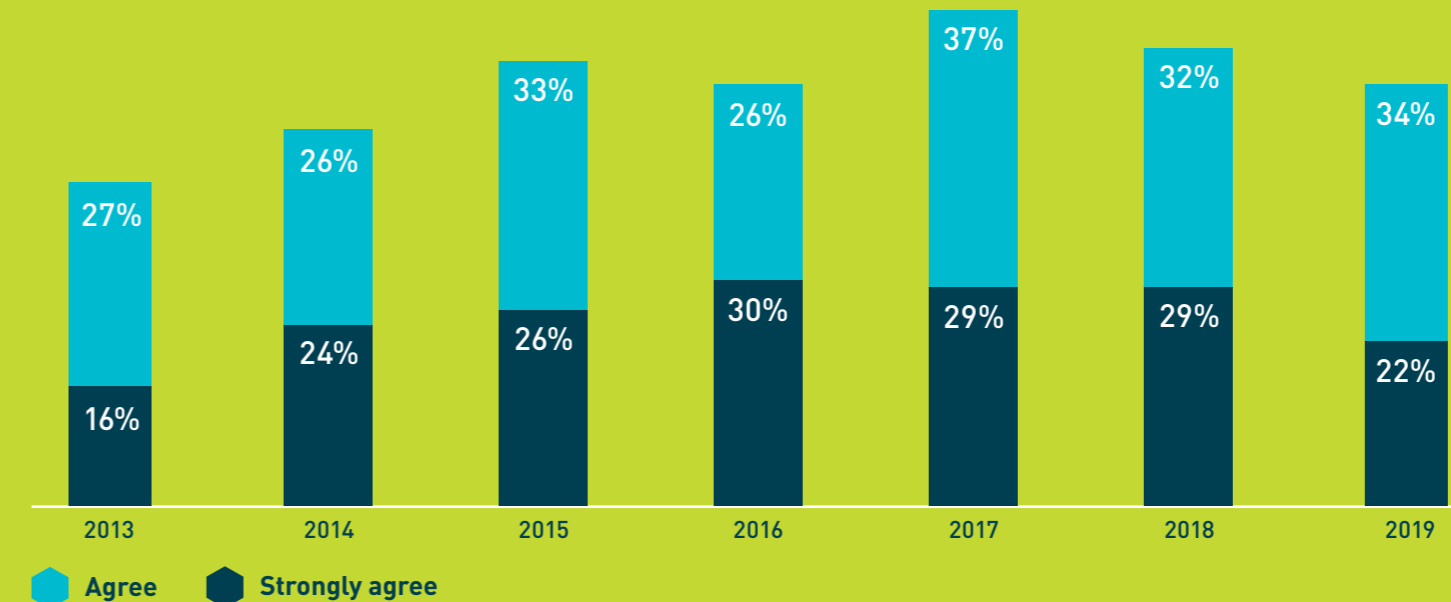
Despite the housing crisis deepening across the country, with affordability at an all-time low in many areas, resident attitudes towards house building shift each year – more so than other areas we ask about in the survey.

In fact, we've seen three years' consecutive decline in residents who agreed that there is a need for more homes in their area: in 2017, two

“
What really mattered to residents was feeling secure and having a degree of control over their home.”

Fig 21: Percentage of residents agreeing with the statement, “There is a need for more homes in my area?”, over time

Base: All respondents (2017-2019: n2000, 2016: n1500, 2013-2015: n1000)



77%
of residents agree it is important to them that Clarion builds more homes.

Clarion is certain that building more social rented homes is a key way to help alleviate the current housing and affordability crisis.

thirds (67%) agreed, this decreased in 2018 to 61% and this year only 55% of residents agreed with this statement.

Support for building new homes varies by geography, with greatest agreement in London (60%), where affordability is particularly poor with private rents being equivalent to between 47% and 127% of local monthly median earnings. Understandably, people who live in areas where housing is under the most pressure and is least affordable are feeling the greatest need for new homes.

Agreement with the need for more homes also varies by tenure: Clarion tenants (55%) are significantly more likely to agree that there is a need for new homes than Clarion shared owners (44%), who are also more likely to actively disagree that there is a need for more homes.

Clarion is certain that building more social rented homes is a key way to help alleviate the current housing and affordability crisis. The majority of our residents agree that there is a need for more socially rented homes in their area, with over two thirds agreeing (67%), and only one in five (20%) disagreeing that there is a need for more of this tenure.

Again, views vary by tenure, age and to a lesser extent geography; here the disparity between tenants and shared owners is even greater with a twenty percentage point difference. 68% of tenants agreed that more socially rented homes are needed in their area, compared with only 48% of shared owners.

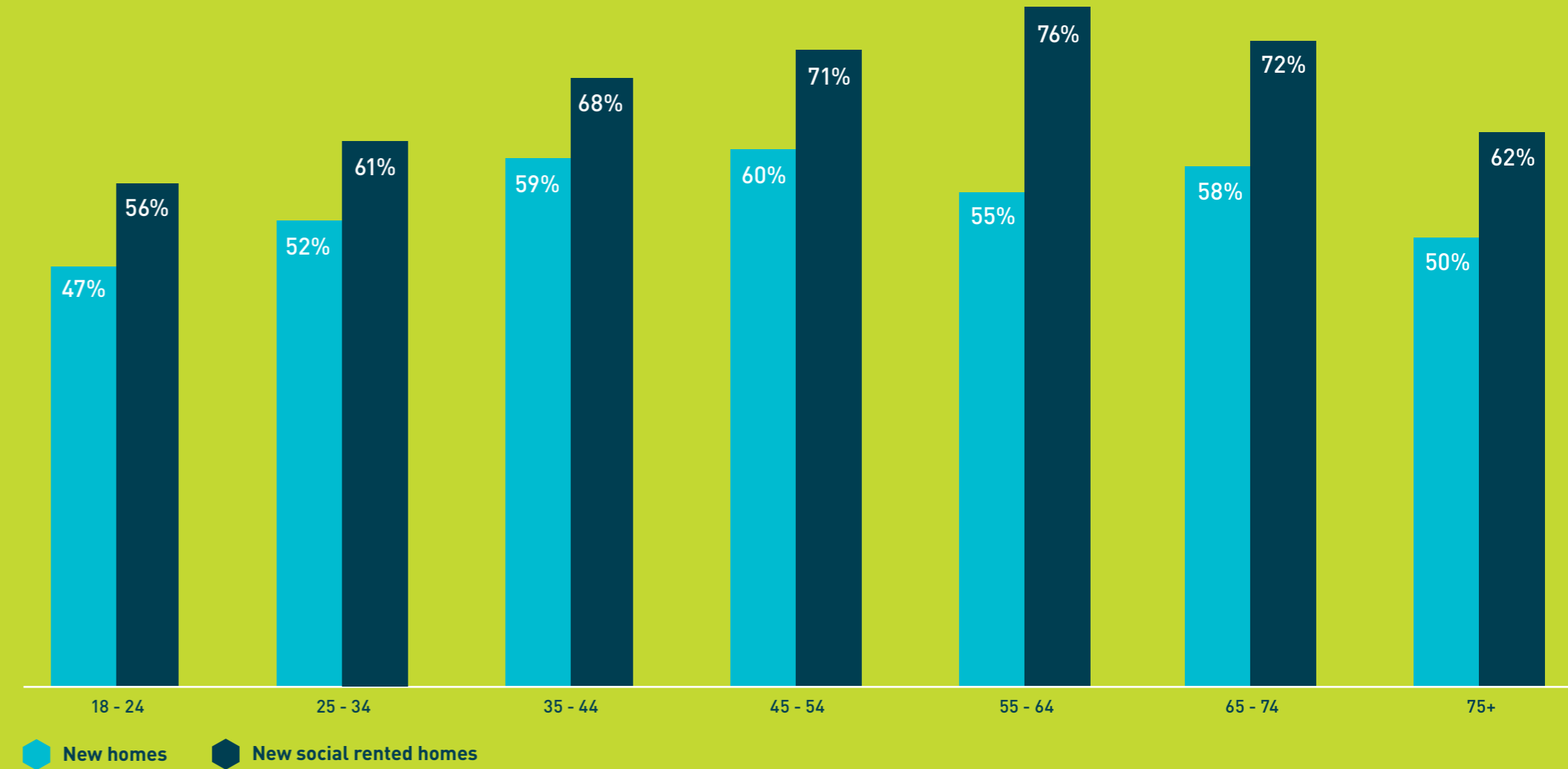
Looking outside of their own local area and experience, over three quarters (77%) of Clarion residents still think it is important that their landlord builds more homes.

67%
of residents agree there is a need for more social rented homes in their area.

While it is disappointing to see the overall agreement with a need for new homes decrease for a second year in a row, this does change year on year and may reflect the prominence of housing in news stories, particularly in election years. Crucially we see that residents still feel that it is important for us to build new homes. Shared owners, around 80% of whom work full-time and tend to view themselves as owner/occupiers, may be more insulated from the housing crisis than renters, hence less likely to see the benefits of providing more homes for social rent.

Fig 22: Percentage of residents agreeing that there is a need for new homes, new social rented homes in my area, by age

Base: All respondents (n2000)



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 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 legacy Housing Association. All calls were completed between 30 May and 21st June 2019.

The questionnaire included a number of the same or similar 'tracking' questions and also new questions were developed. The design closely replicated the order that similar questions had appeared in previous years to ensure results were comparable and was timed to be no more than 15 minutes 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 Clarion data from 2017, 2018 and 2019 is cited, the source is Enventure Research, 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.

There are likely to be interactions between the different demographics reported in this publication. This report mainly focuses on individual characteristics, so differences cited here cannot necessarily be attributed directly to the characteristic being described.


We refer to 'Clarion Housing' and 'Clarion' throughout this report to apply to the activities of Clarion Housing Group Limited which comprises, Clarion Housing Association Limited, Clarion Futures and Latimer Developments Limited.

Please see our website clarionhg.com, for more details.

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 Clarion Housing

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