



# The social value of moving into social housing in Scotland

Year 2 interim research report



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The social value of moving into  
social housing in Scotland  
Published June 2024  
© HACT 2023  
978-1-911056-31-7

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# 1. Introduction

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Understanding the social value of social housing is a 3-year primary data research project that commenced in Autumn 2021 as a partnership between Shelter Scotland and HACT, with support from a research consortium.

The project aims to capture and measure the social value generated through the provision of new social tenancies in newly built, refurbished, and non-refurbished social housing stock in Scotland over a three-year time period.

By addressing gaps in the evidence base about the impact that moving into social tenancies has on wellbeing and life circumstances, it is hoped to inform and support the case for more investment in social housing in Scotland.

The research consortium includes an expert advisory panel consisting of representatives from social housing, public, academic, and voluntary sectors, and the partner organisations, as well as partner organisations who are either Registered Social Landlords (RSLs) or local authorities. There are currently 14 Registered Social Landlords (RSLs) and four local authorities participant organisations actively engaged in the research project.

This report builds on previous publications for this project and presents findings from the analysis of all of the quantitative data provided by partner organisations up to the start of February 2024. It is intended to provide interim findings based in available data submitted by social housing residents and landlords to date.

# 2. Research project overview

## 2.1. Purpose and focus

The overarching research project aims to capture and measure the social value generated through the provision of social tenancies in newly built, refurbished, and non-refurbished social housing stock in Scotland over a three-year time period.

Through this project, HACT and Shelter Scotland have set out to:

- Better understand how social housing tenancies impact on individuals, including health, wellbeing, and life circumstances, such as economic and employment status.
- Better understand how new social housing developments can drive positive impacts for local communities and the environment.
- Broaden the understanding of the lived experiences of new social tenancies in new build and refurbished properties.
- Explore the role of social housing in resolving homelessness, improving affordability, improving physical housing conditions, improving energy efficiency, creating a positive environmental impact, improving neighbourhood cohesion, and providing more suitable and specialist housing.
- Connect data collected on the lived experience of living in social tenancies to the objectives of the Scottish Affordable Housing Supply Programme (AHSP) 2021-2026 programme, the national performance framework, national housing and regeneration outcomes and other stakeholder strategies.
- Produce information and insights to strengthen the case for more social housing tenancies.

In order to achieve this, HACT has proactively sought to curate a consortium of partner organisations in order to build a dataset based on resident perspectives to assess the impact of social tenancies.

There are currently 18 partner organisations involved in the project. Initially the project set out to target four urban areas: Aberdeen, Dundee, Edinburgh, and Glasgow, as these are four key areas where Shelter Scotland deliver focused work. However, as the project has progressed, additional RSLs and LAs have joined the partner consortium, therefore increasing the geographical spread of the project.

## 2.2. Research methodology

At the core of this research, is the use of pre- and post-occupancy surveys designed to capture changes in key social outcomes. The design and development of the survey methodology and data collection tools used in this project have been shaped by the research framework evaluation developed in early 2022 in collaboration with Shelter Scotland and the expert advisory panel.

These surveys are intended to compare the experience of the new tenancy with previous circumstances, and the positive changes residents have experienced since moving into their new tenancy post occupancy. They have been designed to capture data that can be used to measure the social value created in key areas, as well as speak to a range of indicators, measurements, and outcomes frameworks such as the National Performance Framework, Housing and Regeneration outcomes framework, human rights principles. Partner organisations have been directly surveying their residents and submitting collated data to HACT for analysis.

The pre-occupancy survey is the first step in establishing to what extent social value outcomes are realised in social tenancies (new, refurbished, and non-refurbished social housing). These surveys are conducted either before or shortly after moving into the new property. The data allows HACT to establish the baseline that will be used to calculate social value create by social across Scotland.

During the pre-occupancy surveys, lead residents for the tenancy were surveyed on behalf of the household on their experience and life outcomes while living in their old housing. Demographic data was also collected at this point, including age, ethnicity, gender, and the reasons for the move to provide a profile of residents moving into new social tenancies.

## 2. Research project overview continued

At set time points, these same lead residents are re-engaged to capture post-occupancy surveys to capture changes for residents.

Over the course of the three-year project, we expect to collate data for four waves of data collection, including:

- Wave 1: Pre-occupancy data collected prior to, or at the very start of a tenancy.
- Wave 2: Post-occupancy data collected 3-6 months after the start of the tenancy.
- Wave 3: Post-occupancy data collected 12 months after the start of the tenancy.

- Wave 4: Post-occupancy data collected 24 months after the start of the tenancy.

### 2.3. Project progress to date

Partner organisations have continued to collect data directly from residents, typically through a phone call or in person visit, and submitted this to HACT using the project data collection tool. The next section details the analysis of all data submitted to date. The table on pages 5-6 details the progress of each partner organisation in collecting and submitting data for HACT to analyse.

Organisation	Wave 1 data	Wave 2 data	Wave 3 data	Wave 4 data
Angus Housing Association	Submitted	Due to be submitted in 2024	Due to be submitted in 2025	
Argyll & Bute Council / Argyll Community Housing Association	Submitted	Due to be submitted in 2024	Due to be submitted in 2025	
Barrhead Housing Association	Due to be submitted in 2024	Due to be submitted in 2024		
Berwickshire Housing	Due to be submitted in 2024	Due to be submitted in 2024		
Cassiltoun Housing Association	Submitted	Submitted	Due to be submitted in 2024	Due to be submitted in 2025
Glasgow West Housing Association	Due to be submitted in 2024	Due to be submitted in 2024		
Grampian Housing	Submitted	Submitted	Due to be submitted in 2024	
Harbor Scot Housing Association	To be confirmed			
Horizon Housing Association	Due to be submitted in 2024	Due to be submitted in 2024		
Link Group	Submitted	Submitted	Submitted	Due to be submitted in 2025

## 2. Research project overview continued

Organisation	Wave 1 data	Wave 2 data	Wave 3 data	Wave 4 data
New Gorbals Housing Association	Submitted	Submitted	Due to be submitted in 2024	
North Lanarkshire Council	Submitted	Submitted	Submitted	Due to be submitted in 2025
Osprey	Submitted	Due to be submitted in 2024	Due to be submitted in 2024	
Queens Cross	Submitted	Submitted	Submitted	Due to be submitted in 2025
Stirling Council	Submitted	Submitted	Submitted	Due to be submitted in 2025
West Lothian Council	Submitted	Submitted	Due to be submitted in 2024	Due to be submitted in 2025
West of Scotland	Submitted	Submitted	Due to be submitted in 2024	Due to be submitted in 2025

As the table illustrates, partners are at different stages in the project Waves, with up to 7 partner organisations expected to submit data for all 4 waves of data collection and submissions. Therefore, the sample for Waves 1, 2 and 3 has increased between the Year 1 interim research report and this Year 2 interim research report and will likely continue to increase over the remaining year of data collection.

Recognising the potential for attrition in the data samples between Wave 1 and later data collection waves, HACT has continued to recruit partner organisations who are undertaking rolling surveys with different data collection cycles in order to increase the overall sample size for the project data set.

As the project progresses, partners will be delivering more new housing and subsequently conducting more pre-occupancy surveys. The baseline over time will therefore become more accurate and precise. At the moment, for the purposes of this report, the following data should continue to be considered as indicative results until the end of the project.

# 3. Research findings

This section details the findings from all of the data submitted to HACT up to the start of February 2024. It considers engagement in Waves 1, 2 and 3 of data collection, the profile of residents participating in the research and the indicative social value that has been created following a period of occupancy in new tenancies.

## 3.1. Resident engagement

To date, the research has engaged a total number of 316 residents, and this can be broken down by each wave of data collection. A total of:

- 316 residents have completed pre-occupancy survey (Wave 1)
- 129 residents have completed 3–6-month post-occupancy survey (Wave 2)
- 27 residents have completed 12-month post-occupancy survey (Wave 3)

This indicates there has been some attrition, which is to be expected as the research is a longitudinal project, and circumstances change for both residents and the partner organisations. For example, residents may no longer wish to complete a survey about their tenancy a year after moving in and priorities may change for landlords due to staff turnover, mergers, and competing priorities. Additionally, some of those who have completed the Wave 1 survey had not completed a Wave 2 or Wave 3 survey at the time of this analysis. Therefore, it is important to recognise the limitations with the current sample size, particularly with the data available for Wave 3.

Partner organisations have also highlighted the challenges with data collection and re-engaging with residents once they have moved into the property. In an effort to improve response rates, partners have tried different approaches including phone calls, face to face meetings, collecting data as part of existing processes and incentives such as prize draws. This is something that will be explored further in the final report in 2025. Based on available data to date, we can see that compared to Wave 1, the current response rate at Wave 2 is 40% and Wave 3 is 21%.

It is important to note that whilst partner organisations have attempted to synchronise data collection with research reporting periods, there are a number of partners that are not due to collect data until later in the 2024 calendar year therefore missing the reporting period for this report. HACT anticipates the overall figures for Waves 1, 2 and 3 to be much higher in the final reporting period in 2025.

## 3.2. Resident profile

The following data reflects demographics of residents completing the pre-occupancy survey:

- 69% were female, 30% were male, and 1% were joint male and female lead residents (base : 284).<sup>1</sup> In comparison, the makeup of Scottish households is 51% female and 48% male, indicating a higher representation of female lead residents in these new tenancies.
- 30% were between 25 and 34 years old. In comparison, this age group only makes up 15% of residents living in social housing in Scotland.<sup>2</sup> Other age groups are of similar size, suggesting an equal distribution across all age groups, with the Under 25 and 55–64-year groups at 13% and 10% respectively, and the 35-44 and 45-54 age groups both at 17% of the base. The 65+ age group represented 14%. (Base 229).
- 76%, an overwhelming majority were White Scottish, followed by 10% White British (base 186). Across Scotland, it is estimated that 96% of the population are of white ethnicity.

The following data reflects the household composition.

- 29% of households were a single parent household (base 91). In comparison, 11% of social rented households were single parent families.<sup>3</sup>
- 75% of households had people under 18 years old living in the home (base 300).

1 Hereafter “base” refers to the number of respondents who answered that particular survey question.

2 “Social tenants” (2017), Scottish government <https://www.gov.scot/publications/social-tenants-scotland-2017/>

3 ibid

### 3. Research findings continued

In the full and final research report, HACT will compare the profile of sample of survey respondents with the Scottish Household Survey to consider how the research sample compares with the social housing resident population in Scotland

The following data considers different aspects of the new tenancy, including reasons for moving, routes to the tenancy and the type of property residents have moved into.

#### Reasons for moving

Moving to the tenancy from homelessness and overcrowding were two of the main drivers for moving, as illustrated in the table below (base 217).

Overcrowded (previous property too small for the household)	45	21%
Formerly homeless	45	21%
Decanting (property being demolished)	29	13%
Downsizing	22	10%
Other [open text]	19	9%
ASB/ harassment	17	8%
Condition of the property was poor and not suitable to live in	14	6%
Health reasons (including mobility)	13	6%
Domestic violence / abuse	12	6%
Employment or training	1	0%
Relationship breakdown	-	-
Evicted due to mortgage default payments	-	-
Could not afford private accommodation or other social housing	-	-
Leaving care	-	-
<b>TOTAL</b>	<b>217</b>	

#### Type of property

In terms of the types of properties that residents have moved into, the overwhelming majority of property were new builds, (91%), with a smaller number of properties being older non refurbished properties (base 315). Encouraging the development of more new build social properties is a key focus for Shelter Scotland and therefore this research is largely focused on residents moving into new builds.

New build	287	91%
Older (non-refurbished) property	28	9%
Older but refurbished property	0	0%
<b>TOTAL</b>	<b>315</b>	

#### Routes to be awarded property

The main routes to the tenancy included landlord's transfer list and landlord's waiting list, see below (base 278).

Landlord's transfer list	67	24%
Landlord's waiting list	55	20%
Statutory homeless	53	19%
Choice based lettings	41	15%
Management transfer	31	11%
Local authority priority list	30	11%
Mutual exchange	1	0%
<b>TOTAL</b>	<b>278</b>	

#### Previous housing situation

The majority of lead residents were previously living in another social housing property with the same landlord (see table on next page, base 235).



### 3. Research findings continued

Another social housing property with the same landlord	99	36%
Another social housing property with different landlord	33	17%
Moving from privately rented property	32	15%
Moving from homeless or temporary accommodation	21	4%
Moving from property that you owned	10	5%
Moving from family home – first rented property	15	5%
Other [open text]	50	18%
Moving from care home or foster care – first rented property	0	0%
<b>TOTAL</b>	<b>235</b>	

18% of survey respondents selected 'other' for this question, and some of these provided more detail. The Other response can be categorised as temporary council accommodation, temporary accommodation, homelessness accommodation sofa surfing and living with family and/or friends.

#### 3.3 Wave 1 data analysis

The following section considers the Wave 1 data submissions to provide a baseline.

From a social value measurement perspective, it is important to concentrate on what changes for residents moving into the properties. We have paid particular attention to financial and employment status at the point of moving into the new tenancy.

- Ability to pay for housing: 17% of survey respondents reported that they had struggled to pay their rent in their previous property. 80% reported that they had not experienced any issues (base 234).
- Financial comfort: 20% of survey respondents reported that they had been unable to afford essentials after paying rent when living in their previous property. 72%

reported that they had been able to pay for essentials after paying rent (base 237).

- Ability to heat the household in the winter: 20% of survey respondents reported that they had been unable to heat their previous property in winter, compared with 72% who reported that they had been able to heat the property (239).
- Employment & training outcomes: 24% of survey respondents were in full-time employment and 15% were in part-time employment at the point of starting the new tenancy, and 23% were unable to work due to health reasons (base: 234).

We have also paid particular attention to how residents felt about their housing prior to moving into the new tenancy.

- Pollution: 20% of survey respondents were worried about the impact of pollution on their health in their old property, whereas 46% were not worried (base: 243).
- Greenspaces were within walking distance: 63% of survey respondents reported that greenspaces around their old property were easy to access, whereas 16% reported that they had not been easy get into and around (base: 250).
- Good neighbourhood: 63% % of survey respondents reported that they had liked living in their old neighbourhood, whereas 32% did not (base: 230).
- Feel part of community: 50% of survey respondents reported that they had felt part of their old community, whereas 28% did not (base: 235).
- Not worried about crime: 37% of survey respondents reported they had been worried about crime in their old neighbourhood, whereas 49% had not (base: 244).

## 3. Research findings continued

We have also paid particular attention to how residents felt about the impact of their previous housing situation on their health and wellbeing.

- **Accessibility:** 54% of survey respondents reported that their previous homes had been easily accessible to people of all abilities, whereas 35% reported that their previous property had not been accessible for everyone in the household (base: 248). Accessibility here means suitable for different ages and abilities.
- **Impact to health:** 50% of survey respondents reported that their previous property had made them less healthy, 15% reported that it had made them healthier, and 35% reported that it made no difference to their health (base: 235).
- 23 residents stated that their mental health was negatively affected while living in the old property.
- 23 residents referenced mobility or disability issues, such as stairs, that negatively affected their health.

- 4 residents suggested that overcrowding or not having enough space negatively affected their health.
- 3 residents states that they did not have stable housing previously, and this affected their overall health.
- 3 residents stated that the housing was not secure or private, which also affected their health.

### 3.4. Social value based on changes reported between Wave 1 and 2 surveys

To calculate social value, we need to understand what changes occur. Comparing Wave 1 and Wave 2 data, we can identify where positive changes have occurred and use this data to run a social value calculation. It focused on the data set created by the 129 responses to the Wave 2 survey.

The table below details the number of positive financial, employment and community outcomes that have been achieved between the pre-occupancy and 3–6-month post occupancy survey. HACT has run a social value assessment using this data and HACT's social value methodology and

	Number	Total wellbeing value	Total Exchequer value	Total social value
Able to pay for housing	8	£9,498.16	£259.29	£9,754.45
Financial Comfort	21	247,117	2,261	249,478
Able to heat household in the winter	19	115,363	1,160	116,523
Full-time employment	5	34,616	29,335	63,951
Part-time employment	3	22,559	4,779	27,338
Training	2	0	2,608	2,608
Pollution	42	172,939	2,164	175,103
Greenspaces are within walking distance	19	78,347	621	78,969
Good neighbourhood	18	91,405	741	92,146
Feel part of community	10	75,417	638	76,055
Not worried about crime	32	139,514	828	140,342
<b>Total social value achieved</b>		<b>£1,004,725</b>	<b>£55,223</b>	<b>£1,060,049</b>

### 3. Research findings continued

UIK Social Value Bank. The UK Social Value Bank provides three key values, including:

- Wellbeing values, which is the primary direct impact experienced by an individual.
- Exchequer value, which is the secondary in direct impact experienced by the public purse.
- Total social value, which is the wellbeing and exchequer values combined and adjusted for deadweight (what could have happened anyway without the intervention). More details about the HACT methodology can be found in the Appendices.

Using the UK Social Value Bank, we have calculated that the changes reported between the pre-occupancy survey and 3-month survey generated a social value of £1,060,049.

This suggests that the provision of social rented accommodation has a positive impact of the life circumstances and wellbeing of residents and contributes towards social value.

In order to measure social value using HACT's methodology, we need to see a certain level of change happen between the pre-occupancy and 3–6-month post-occupancy surveys. Depending on the outcome, this may need to be a substantial amount of change to be able to claim to social value. This change is captured through the survey questions asking about people's living and life circumstances. Using the same questions enables us to track change and determine if the required level of change has occurred to claim social value outcomes. Only those changes that match the required level of change have been included in these social value calculations.

The values where most survey respondents have reported a significant enough change to claim social value were:

- Pollution – 33% (42) of survey respondents in wave 2 reported a positive change.

- Not worried about crime – 25% (32) of survey respondents in wave 2 reported a positive change.
- Financial comfort – 16% (21) of survey respondents in wave 2 reported being more financially comfortable.
- Able to heat household in winter – 15% (19) of survey respondents in wave 2 reported a positive change.
- Good neighbourhood – 15% (19) of survey respondents in wave 2 reported a positive change.
- Accessible green spaces - 14% (18) of survey respondents in wave 2 reported a positive change.

Using the demographic information, we can explore the extent to which social value has been created with specific groups. Emerging insights from this analysis suggests that:

- On average, those individuals who reported positive improvements in outcomes between the pre-occupancy and post-occupancy surveys, attained an average of £11,027.41.
- Male respondents reported higher average social value per individual than female respondents.<sup>4</sup> This is something HACT will be exploring further with partner organisations and residents in the final year of the research project through qualitative engagement.
- Residents who moved from an owner-occupied property and from another social housing property with different landlord reported higher average rates of social value per individual compared to other routes to tenancy. This is something HACT will be exploring further with partner organisations and residents in the final year of the research project through qualitative engagement.

<sup>4</sup> Some responses were lacking gender data, therefore the overall number of responses for gender analysis is lower than the total number of responses.

### 3. Research findings continued

This indicates that housing associations and council can deliver the most impact for male residents and those who have moved into the tenancy from a private property or social rented property from another landlord.

Survey respondents reported positive changes that has not been significant enough to apply a social value calculation, however, it is important to note these changes.

- 94% of survey respondents reported they enjoy living in their new property more than the one they lived in previous.
- 92% of survey respondents reported that they felt the overall condition of the new property was better than their previous property.
- 52% of survey respondents reported that they felt their new property had a positive impact on their health. Health outcomes can take longer to improve, and housing is just one factor that can influence this. We assume that we will see a greater health improvement with a larger sample size at the end of Year 3.

Characteristics		Total social value
Overall	Average individual value	£11,027.41
Gender	Female	£10,848.76
	Male	£12,988.10
Age group	Under 25	£12,506.08
	25-34	£8,919.85
	35-44	£13,946.54
	45-54	£13,846.00
	55-64	£12,161.69
	65+	£7,600.73
Route to tenancy	Another social housing property with the same landlord	£10,643.85
	Another social housing property with different landlord	£15,073.68
	Moving from privately rented property	£4,555.87
	Moving from homeless or temporary accommodation	£8,294.40
	Moving from property that you owned	£17,794.92
	Moving from family home – first rented property	£0
	Other	£5,028.23
	Moving from care home or foster care – first rented property	£0

## 3. Research findings continued

- 94% of survey respondents reported that they like living in their new neighbourhood.

The survey also asked lead residents about the impact that moving into the new property will have on their life. Many respondents who answered this question in the 3month post occupancy survey indicated that they felt their life would have been significantly worse. Respondents suggested that if they had remained in their previous home, they would have:

- Been less independent due to mobility issues, not living on the ground floor or living with relatives.
- Continued to struggle with mental health issues, including suicidal thoughts and stress.
- Faced harassment or ASB that they no longer face in their new home.
- Continued to experience health issues themselves or their family members would have suffered poor health.
- Continued to live in overcrowding accommodation, which they no longer experience in their new property.

This indicates that the new social tenancy has improved the life circumstances of residents.

### 3.5. Social value based on changes reported between Wave 1, 2 and 3 surveys

To calculate social value, we need to understand what changes occur. Comparing data from Waves 1, 2 and 3, we can identify where positive changes have occurred and use this data to run a social value calculation.. It focused on the data set created by the 27 responses to the Wave 3 survey. It is important to note, that this is a small sample, and is presented here to provide an indication of the social value that can be created over time. The findings will change as more responses for Waves 3 and 4 are submitted.

The data collected in the 12-month post occupancy survey demonstrates that further positive financial, employment and community outcomes that have been achieved.

HACT has run a social value assessment using this data and HACT's social value methodology and UK Social Value Bank. The UK Social Value Bank provides three key values, including:

- Wellbeing values, which is the primary direct impact experienced by an individual.
- Exchequer value, which is the secondary in direct impact experienced by the public purse.
- Total social value, which is the wellbeing and exchequer values combined and adjusted for deadweight (what could have happened anyway without the intervention). More details about the HACT methodology can be found in the Appendices.

Individuals reported significant enough changes in social outcomes between the pre-occupancy, three month post-occupancy survey and 12-month survey. Using the UK Social Value Bank, we have calculated that the changes reported generated a social value of £107,421 (see table on next page).

To date, there have only been two outcomes against which Wave 3 survey respondents have reported a significant enough change to claim social value. These were financial comfort and good neighbourhood:

- Financial comfort – 3 respondents reported being more financially comfortable (in addition to those who reported a positive change in the 3-month post occupancy survey).
- Good neighbourhood - 11 respondents reported a positive change (in addition to those who reported a positive change in the 3-month post occupancy survey).

With more Wave 3 data due to be submitted by the end of the data collection period, HACT anticipates the number of outcomes being achieved and therefore the social value being captured at this stage to increase.

Where the number of outcomes being achieved does not increase in line with the sample size, HACT will consider the

### 3. Research findings continued

extent to which positive impacts occur in the first 3-6months post occupancy and whether further impact can be achieved from moving into a new tenancy after that initial period.

Social value outcome	Count of outcomes achieved	Total wellbeing value	Total Exchequer value	Total Social Value
Able to pay for housing	0	-	-	-
Financial Comfort	3	£35,302	£337	£35,640
Able to heat household in the winter	0	-	-	-
Full-time employment	0	-	-	-
Part-time employment	0	-	-	-
Training	0	-	-	-
Pollution	0	-	-	-
Greenspaces are within walking distance	0	-	-	-
Good neighbourhood	11	£67,875	£574	£83,661
Feel part of community	0	-	-	-
Not worried about crime	0	-	-	-
<b>Total social value achieved</b>		<b>£106,494</b>	<b>£927</b>	<b>£107,421</b>

# 4. Summary and next steps

## 4.1. Summary

This interim research report details the findings from analysis of all data submitted to HACT up to the start of February 2024. The vast majority (91%) of these findings were from residents moving into new build social tenancies.

The research undertaken so far start to provide a better understanding of how social housing tenancies impact positively on individuals, including health, wellbeing, and life circumstances, such as economic and employment status. The analysis enables us to start to explore the role of social housing in resolving homelessness, improving affordability, improving physical housing conditions, improving energy efficiency, creating a positive environmental impact, improving neighbourhood cohesion, and providing more suitable and specialist housing.

Key headlines from the research so far:

- Data demonstrates a positive social change through pre and post occupancy survey responses in 10 different outcomes from the UK Social Value Bank.
- In the 3-6 months post occupancy survey the largest number respondents recognised added social value in terms of pollution (42 respondents), not being worried about crime (32 respondents) and financial comfort (21 respondents).
- Growing baseline and evidence base through which the impact of providing social tenancies can be assessed as experienced by individuals moving into new social tenancies in newly built, refurbished, and non-refurbished properties. As the baseline data set grows more analysis will be available to understand how responses differ in relation to demographic data, previous circumstances, and reasons for moving.
- In line with the Year 1 interim research report, the data continues to show that respondents are reporting positive improvements in key areas, including neighbourhood outcomes, some improvements to financial employment circumstances and there are some initial indications of improved physical and mental health, reduction

in overcrowding and increased suitability of the new properties.

As more data is submitted for Waves 2, 3 and 4 over the next 12 months, we will be able to see if these trends continue. There will also be additional surveys for those who have completed Year 1 post surveys in Year 2 to deepen understanding as to what has changed over a longer period of time.

The analysis of the full data set at the end of the research project will provide more confidence in making a case for the strong impact social housing makes in relation to the national performance framework and the value of the Affordable Social Housing Programme funding.

HACT is also engaging with residents and social housing landlords through qualitative engagement to capture more data and insights about the impact of moving into, and living in, a social housing tenancy and bring the quantitative data to life with lived experience stories.

## 4.2. Next steps

In terms of next steps, partner organisations will continue to collect data from engaged residents and submit this to HACT for analysis. The final data submission point will be early 2025. Following this, we will undertake analysis of all data to identify trends.

In addition to resident data, partner organisations will also be providing more detailed information about the properties that residents have moved into and wrap around activities that they provide to residents. For example, where partner organisations have recruited survey respondents from tenancies in a newly developed scheme, HACT will develop case examples of these schemes to include in the final report alongside the quantitative data analysis to add further detail to the analysis and be used to demonstrate the impact of new developments on the wellbeing of residents and communities.

Partner organisations have also discussed the challenges with re-engaging residents to capture the post-occupancy

## 4. Summary and next steps continued

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data for Waves 2, 3 and 4. HACT plans to capture the key challenges and the ways in which partner organisations have sought to address these challenges to ensure they are able to provide data for analysis and present this as additional learning captured during the project.

The full and final report will detail:

- An overview of the context in Scotland based on the original literature review and supplemented with new evidence that has been released since the literature was published.
- The impact framework for the research, including the theory of change that has been developed and refined during the research project and the social impact methodology that has been used.
- Analysis of the full survey data set submitted by social housing landlords over the course of the research. This will consider the positive changes that have occurred as well as negative changes reported by residents and provide a social value calculation based on available data.
- Analysis of qualitative engagement with residents and social housing landlords.
- Key headlines, conclusions, and recommendations.



# Appendix 1: Acknowledgments

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## 5.1. Project participants

HACT and Shelter Scotland wish to acknowledge the input of social landlords and their residents in this research. Key partners include:

- Angus Housing Association
- Argyll & Bute Council
- Argyll Community Housing Association
- Barrhead Housing Association
- Berwickshire Housing
- Cassiltoun Housing Association
- Glasgow West Housing Association
- Grampian Housing
- Harbor Scot Housing Association
- Horizon Housing Association
- Link Group
- New Gorbals Housing Association
- North Lanarkshire Council
- Osprey
- Queens Cross Housing Association
- Stirling Council
- West Lothian Council
- West of Scotland

## 5.2. Advisory Group

HACT and Shelter Scotland wish to acknowledge the input of the project advisory panel. Member of the panel include:

- Association of Local Authority Chief Housing Officers (ALACHO)
- UK Collaborative Centre for Housing (CACHE\_)
- Glasgow and West of Scotland Forum of Housing Associations
- Joseph Rowntree Foundation (JRF)
- LINK Group
- New Haven Research
- Public Health Scotland (PHS)
- Scottish Federation of Housing Associations (SFHA)

# Appendix 2:

## Resident demographics

### Gender

	Overall	Overall %
Female	197	69.4%
Male	84	29.6%
Other	3	1.1%
<b>Total</b>	<b>284</b>	<b>100%</b>

### Ethnicity

White - Scottish	137	73.7%
White - British	19	10.2%
White - Other British	3	1.6%
White - Irish	1	0.5%
White - Gypsy/Traveller	0	0.0%
White - Polish	5	2.7%
White Other [open text]	2	1.1%
Mixed or multiple ethnic groups	5	2.7%
Any mixed or multiple ethnic groups	1	0.5%
Asian - Scottish	0	0.0%
Asian - British	0	0.0%
Asian - Pakistani	0	0.0%
Asian - Pakistani Scottish	0	0.0%
Asian - Pakistani British	0	0.0%
Asian - Indian	1	0.5%
Asian - Indian Scottish	0	0.0%
Asian - Indian British	0	0.0%
Asian - Bangladeshi	0	0.0%
Asian - Bangladeshi Scottish	0	0.0%
Asian - Bangladeshi British	0	0.0%
Asian - Chinese	0	0.0%
Asian - Chinese Scottish	0	0.0%

Asian - Chinese British	0	0.0%
Other [open text]	0	0.0%
African	6	3.2%
African - Scottish	0	0.0%
African - British	0	0.0%
African - Other [open text]	0	0.0%
Caribbean or Black	0	0.0%
Caribbean	0	0.0%
Caribbean Scottish	0	0.0%
Caribbean British	0	0.0%
Black - Scottish	0	0.0%
Black - British	0	0.0%
Caribbean - Other [open text]	0	0.0%
Arab	4	2.2%
Arab Scottish	0	0.0%
Arab British	0	0.0%
Other ethnic group [open text]	2	1.1%
<b>TOTAL</b>	<b>186</b>	<b>100%</b>

### Age groups

	Overall	Overall %
Under 25	30	13.0%
25-34	68	29.7%
35-44	38	16.6%
45-54	38	16.6%
55-64	23	10.0%
65+	32	13.9%
<b>Total</b>	<b>229</b>	<b>100%</b>

# Appendix 3:

## Social value context

### 7.1. Overview of social value

Social value is a measurement of the benefits of the work you do, the services you provide and the programmes you deliver for people and communities from the perspectives of those individuals and communities benefiting from your work. The Public Services (Social Value) Act 2012 broadly defines social value as improvements in economic, social, and environmental wellbeing. It provides a way to quantify how different interventions affect people's lives – the overall impact on people's wellbeing, or their quality of life. It is essentially the quantification of the relative importance that people place on the changes they experience in their lives, through changes in wellbeing. This value can be captured and presented in different ways, including market value.

Social value needs to be located in the real experiences of people and communities. When thinking about social value, we can visualise the golden thread from the change people and communities need and want to see for themselves; through what organisations can do about it (how it fits their mission, purpose, and ambition), what change or impact is made and, finally, what value does this drive.

At its most basic level, social value is about understanding, planning, delivering, and evaluating your services and impacts to learn and provide more effective social outcomes. Organisations generate social value outcomes through their services, spending, policies, and practice. Whether social value is a regulatory requirement or discretionary, it can be planned for, delivered, and evaluated just like any other outcome. Examples of how social value is generated is found in the diagram below.



HACT believes that social value is only delivered when impact is achieved where outcomes meet needs. Social impact is therefore the difference made to individuals, communities, and society through interventions and programmes of work. Everything you do as an anchor institution has a social value, and by understanding the impact of your work, you can identify even better outcomes for residents and communities.

Considering impact through the lens of social value enables you to:

- Evaluate the social and environmental impact of your work.
- Inform decision making to create a more impactful and sustainable organisation.
- Make the best resource and person-centred decisions possible.
- Influence policy makers and stakeholders.
- Be consistent with your social purpose.
- Demonstrate value for money.

By measuring the social value created, organisations can evidence the impact they have on individuals and communities. It will also help to drive informed decision making about how and where to improve services, with increased positive results.

There are eight key principles of social value (as set out by Social Value UK):

- 1) Involve stakeholders to understand those affected and experience the change.
- 2) Understand what changes as the change may be intentional or unintentional, and positive or negative.
- 3) Value the outcomes that matter to your organisation and stakeholders

## Appendix 3: social value context continued

- 4) Only include what is material and relevant to your organisation.
- 5) Do not overclaim beyond what you are responsible for.
- 6) Be transparent about the impact generated, even if it is negative.
- 7) Verify to ensure robustness and subjectivity in all social value reporting.
- 8) Be responsive to insights and ensure decision making is timely and supported by appropriate reporting.

Social Value helps provide improved ability and competitive advantage to winning tenders, however organisationally across Baily Garner, could also be used for the following:

- Gather information that improves service delivery and social outcomes.
- Identify areas of success or areas for improvement.
- Help in decision making processes and project appraisal and demonstrate value for money through cost benefit analysis.
- Communicate progress with key stakeholders.
- Align with corporate Strategies and aims.
- Demonstrate alignment and contribute to national, regional, and local priorities.

### 7.2. Measuring social value

This research used the UK Social Value Bank and HACT wellbeing valuation methodology to measure social value. The UK Social Value Bank (UKSVB) is a HACT resource that offers organisations and businesses a way to understand the social impact of their investment in communities. HACT developed the UKSVB using the wellbeing valuation approach and it features as part of HM Treasury Green

Book guidance that sits at the heart of policy evaluation approaches within UK government. Therefore, the values have been calculated using UK Treasury Green Book compliant methods. All values found in the UKSVB are quality assured and co-created by SImetrica-Jacobs, who are members of the UK Government's Social Impact Taskforce.

The UKSVB is based on person centred principles, using data from national data sets relating to self-reported wellbeing and life circumstances and income levels. It provides a suite of 88 outcomes and measures that have been monetised using wellbeing valuation and calculation of net exchequer value. The UKSVB offers a proportionate way to measure social impact and generate insights around cost: benefits, value for money, investment decisions, service improvements and reporting to stakeholders. It has become the standard method used by the social housing sector to measure social impact, with over 400 organisations attending training and using the model in their business decisions.

The UKSVB is a living bank and is continuously expanding to include new values. It was last updated in 2022 with funding and support from a range of investors and supporters via HACT's Social Value Roadmap project. This consortium of organisation identified a range of outcomes of interest for inclusion in the bank, including those relating to community investment, tenancy sustainment, asset management, maintenance, regeneration, and retrofitting. Where data is available, the bank has expanded to incorporate these values. HACT is open to expanding the bank further to include other values that are currently not included but would benefit organisations as part of their impact measurement and reporting.

#### Wellbeing values

To estimate the monetary equivalent of the impacts of the outcomes on individuals, we use the wellbeing valuation method. This approach relies on a comparison between the change in wellbeing from the outcome to be valued with the change in wellbeing from income.

The Wellbeing Valuation methodology estimates value by inferring the impact of social outcomes associated with

## Appendix 3: social value context continued

specific projects or interventions on the subjective wellbeing (life satisfaction) of individuals who experience these outcomes. To calculate the outcomes, large national datasets have been analysed to identify how people's self-reported wellbeing changes due to different life circumstances.

Analysis reveals the impact of these various outcomes on life satisfaction and calculates the amount of money that produces the equivalent impact on life satisfaction. Impact is then converted into a monetary amount by estimating the sum of money which would have an equivalent impact on subjective wellbeing. Wellbeing valuations in the UK Social Value Bank provide a £ proxy equivalent uplift in wellbeing the same amount as the outcome. Wellbeing valuation is therefore a financial measure of how effective a social intervention is, by the positive impact it has on an individual's wellbeing. More technical detail about the wellbeing valuation approach can be found in the wellbeing values methodology guidance notes.

### Exchequer Values

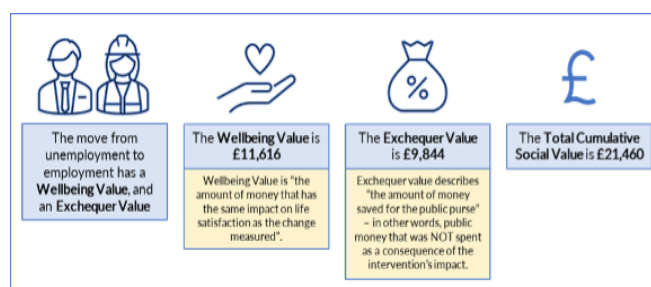
A secondary complementary approach found in the UK Social Value Bank 2022 is the valuation of outcomes via exchequer values, the indirect, secondary impacts of an outcome in net fiscal terms to the government in the

The UKSVB also includes exchequer values, which are the indirect, secondary impact of an outcome in net fiscal terms to the government in the form of tax receipts consistent with the UK average income, saving to the Government in Universal Credit savings, decrease in cost of crime motivated by economic gain associated with transition from unemployment to employment, savings to Government from benefit to the NHS. Cost-savings are referred to as secondary values because they do not capture the benefits directly to the individual (in terms of their wellbeing) but to society more widely, in the form of 'secondary benefits.'

Using the latest available Government data and respected reports, HACT and SImetrica Jacobs have calculated the net exchequer values. For example, these could include reports on graffiti removal costs, reduction in costs associated with crime, reduction in GP visits, reduction in unemployment

benefits or less frequent use of health services associated with being in a secure job as opposed to being unemployed. Please note, for some outcomes such as 'Apprenticeship,' there is a negative impact shown in total social value figure for the exchequer value, as this is something that is primarily government funded. More technical detail about the exchequer valuation approach can be found in the exchequer values methodology guidance notes.

The diagram below demonstrates how the UK Social Value Bank 2022 works in relation to the value to be gained using wellbeing and exchequer valuation.



It is possible to break this value down further so that we can understand the impact on health. HACT has also considered the impact on health in terms of the indirect impact this has on subjective wellbeing and indirect impact on health care costs. We capture these indirect wellbeing impacts and exchequer impacts in the form of health top-up values, designed so that they can be added together with the direct wellbeing values and exchequer estimates through the core analysis.

The Bank includes two types of values: activity based where an individual takes part in an activity – e.g., training or an apprenticeship; and outcome values are applied to an observed change experienced by an individual – e.g., improvement in confidence.

Effective practical use of measures and metrics from the UK Social Value Bank requires selecting the most appropriate outcomes, avoiding double counting, and applying

## Appendix 2: The UK Social Value Bank **continued**

“deadweight.” Deadweight, or “what would have happened anyway” without an intervention, is an important part of social impact analysis. To give an accurate picture of social impact, we have applied a percentage reduction in the HACT wellbeing valuation model, reflecting that a proportion of outcomes would have happened anyway. More technical detail about deadweight can be found in the deadweight methodology notes.

- Wellbeing value – this is the direct impact to an individual in terms of wellbeing and has been adjusted for deadweight. Wellbeing values are from UK Social Value Bank.
- Exchequer value – this is the indirect impact on the public purse from an exchequer point of view. Wellbeing and Exchequer values are from UK Social Value Bank.
- Deadweight – this is the probability that this outcome would have happened anyway and is applied to social value calculations.
- Total Social Value – this is Wellbeing Value plus Exchequer value (and includes the deadweight that has been applied to the wellbeing value).

$$\begin{array}{c} \text{Wellbeing Value} \\ + \\ \text{Exchequer Value} \\ - \\ \text{Deadweight} \\ = \\ \text{Total Social Value} \\ \text{(adjusted for deadweight)} \end{array}$$

The total social value is then multiplied against the number of individuals who have achieved the relevant project outcome to calculate the social impact for a project or programme.



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