

The Future of the PRS

Using Evidence in Policymaking

Scotland's Housing Festival
5th March 2024

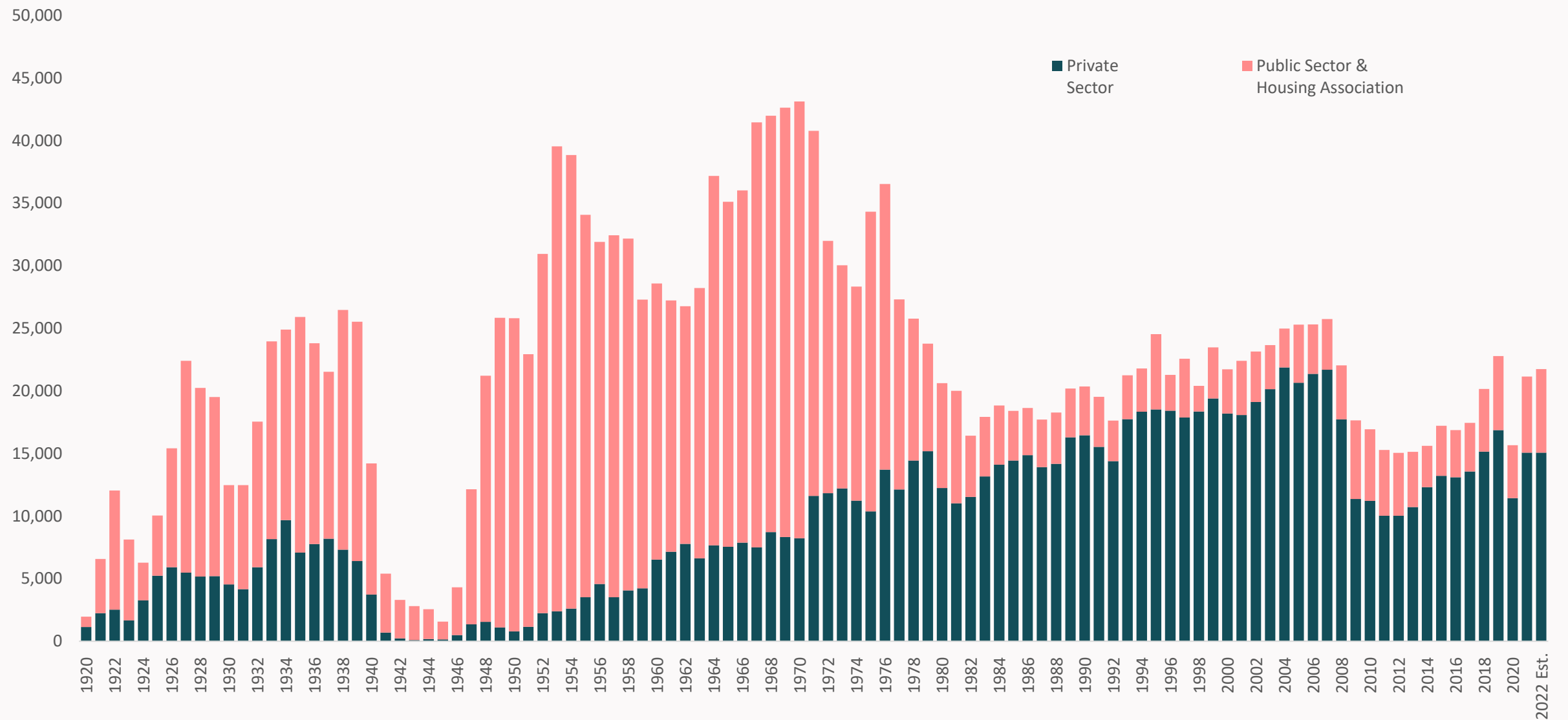
Dr John Boyle
Rettie & Co



A Crisis of Availability and Affordability



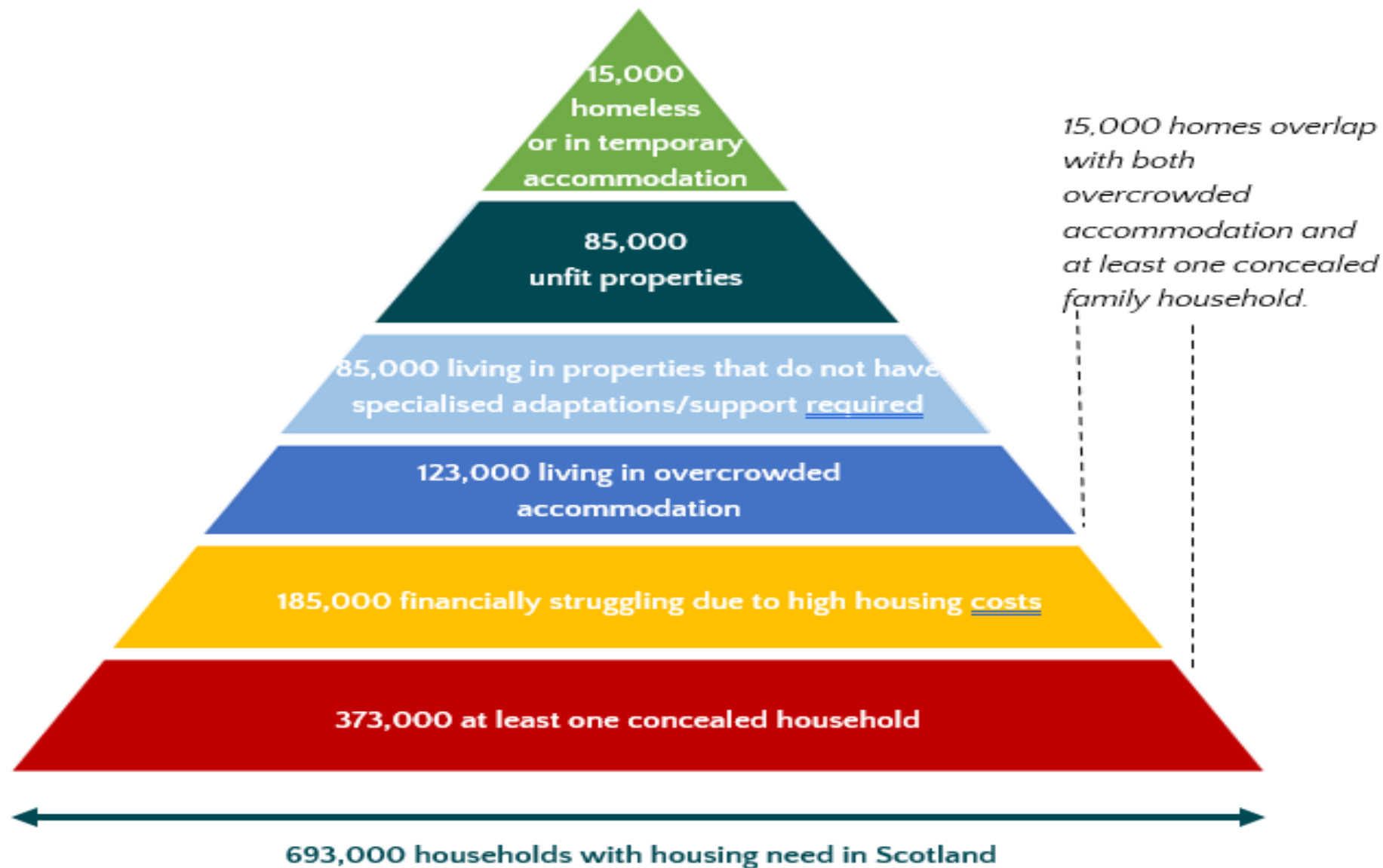
Scotland Housing Completions since 1920



Source: Rettie/Rightmove

Scotland's Housing Needs Crisis

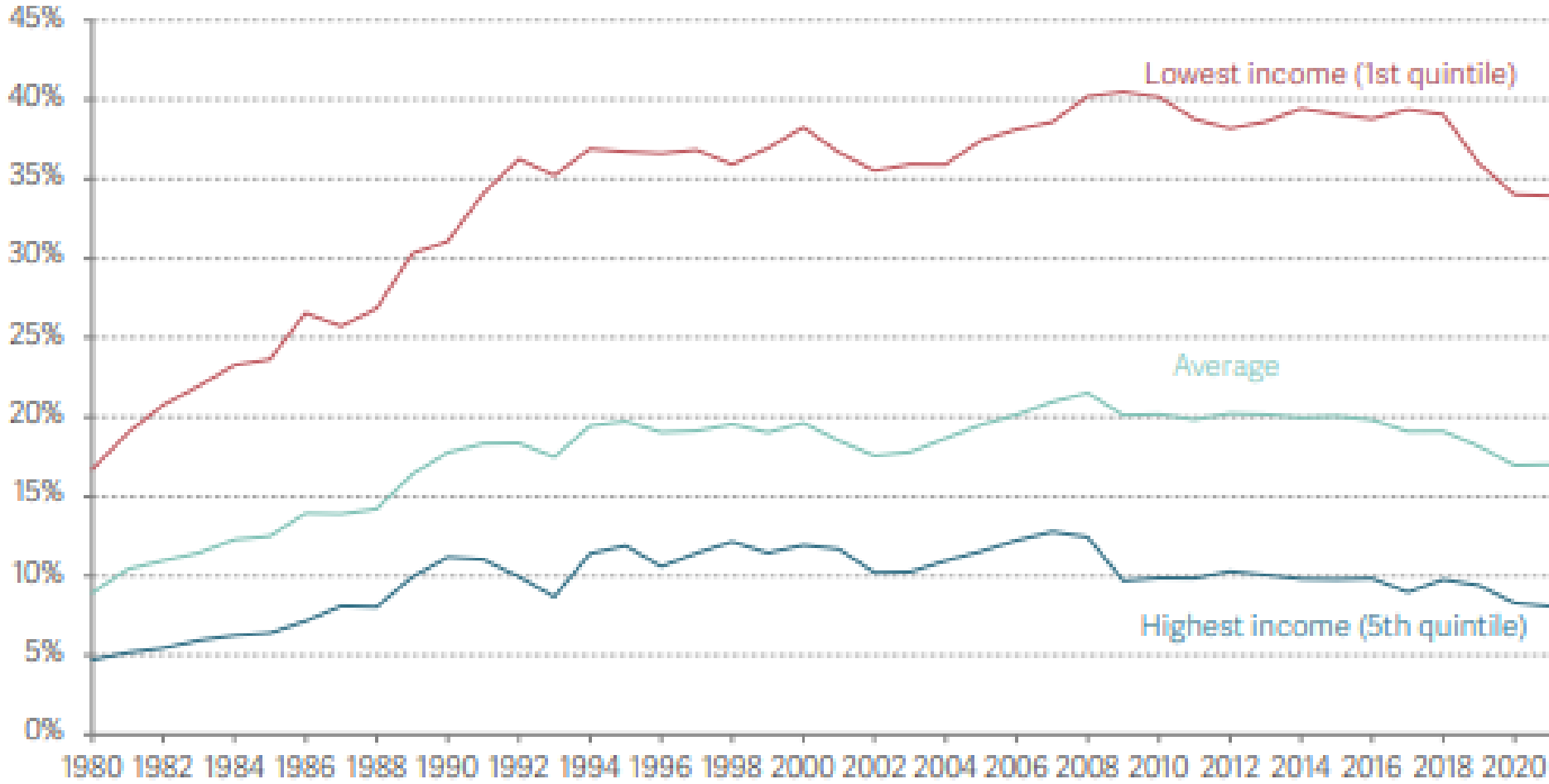
Figure 1: Summary of estimates of existing housing need in Scotland



Source: Diffley Partnership/Rettie & Co

Availability Crisis Underpins Affordability Crisis

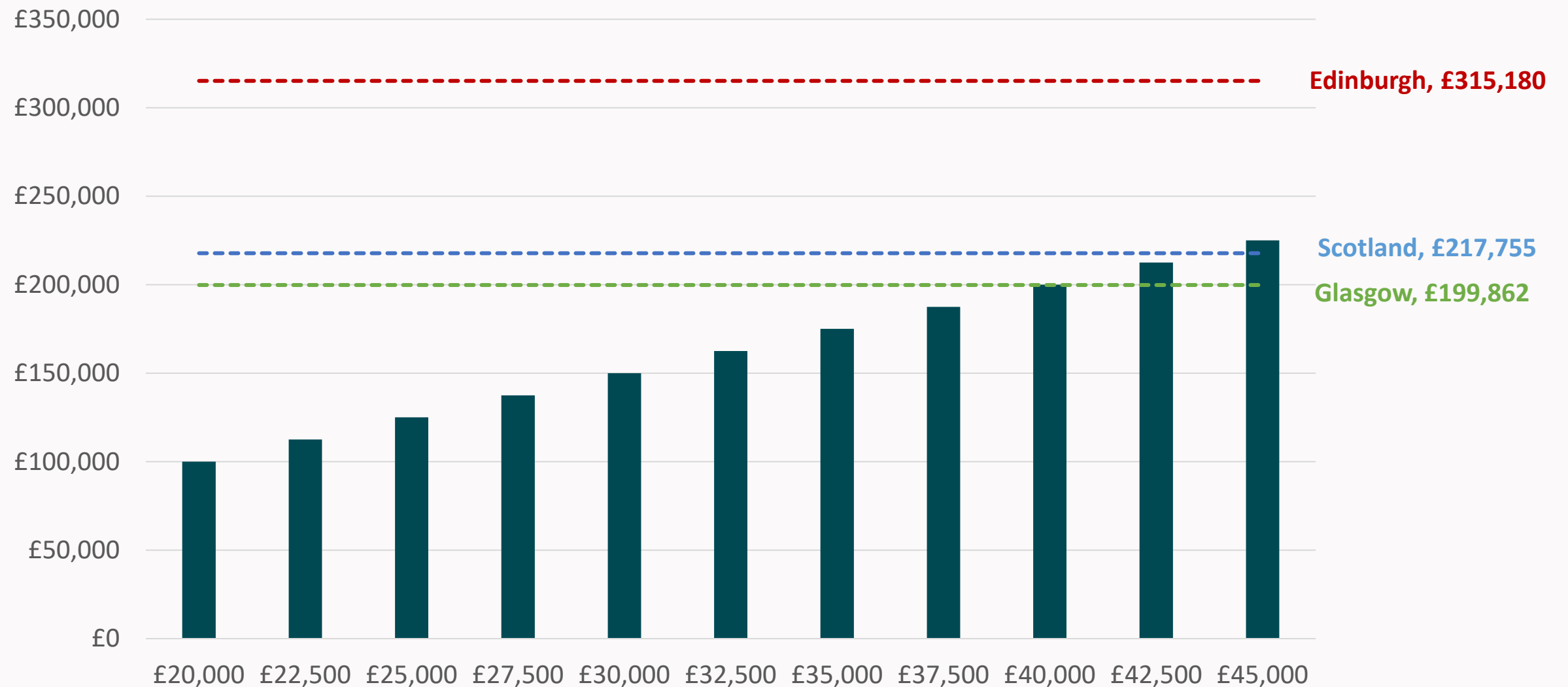
Housing cost to income ratio among working-age family units, gross of housing benefit, by income quintile: GB / UK



Source: Resolution Foundation

Home Ownership is Becoming Out of Reach for Many

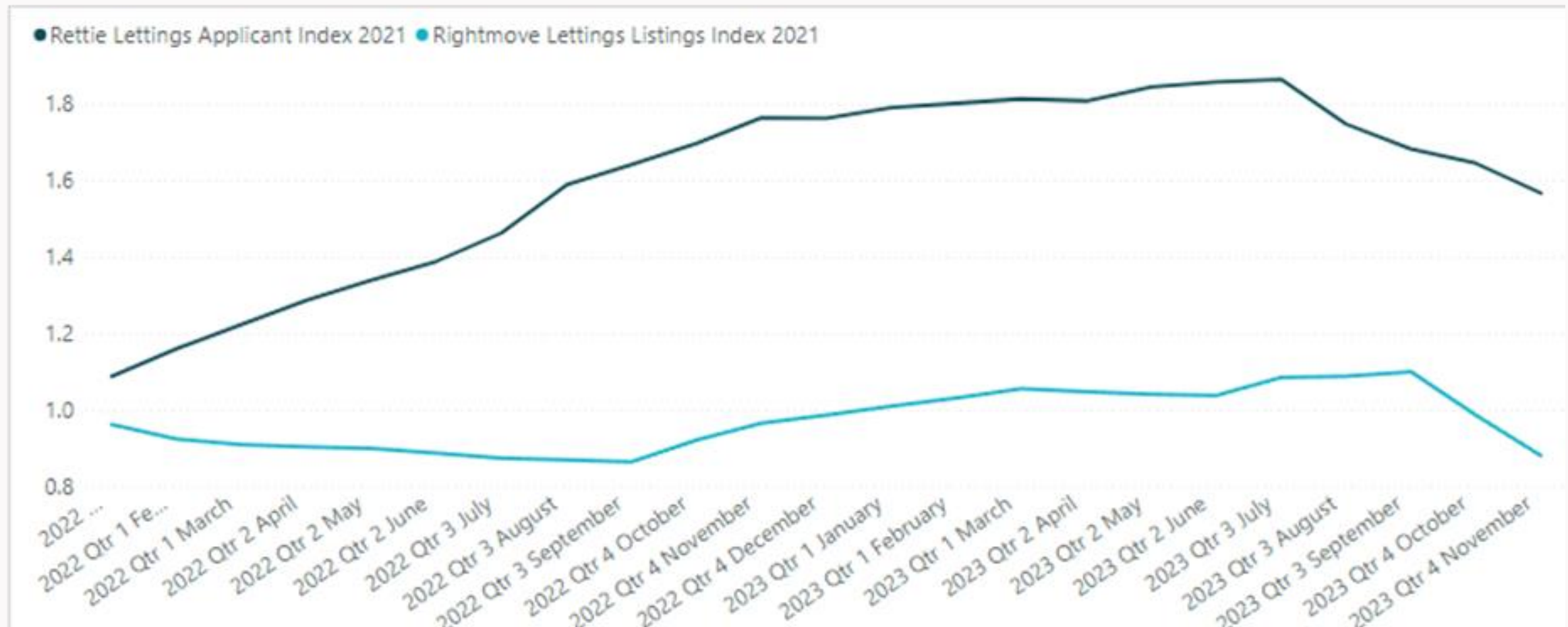
Estimated buying power by salary assuming 4.5 times income and 90% LTV



Source: Rettie & Co, Registers of Scotland

Rental Demand has Surged Ahead of Supply

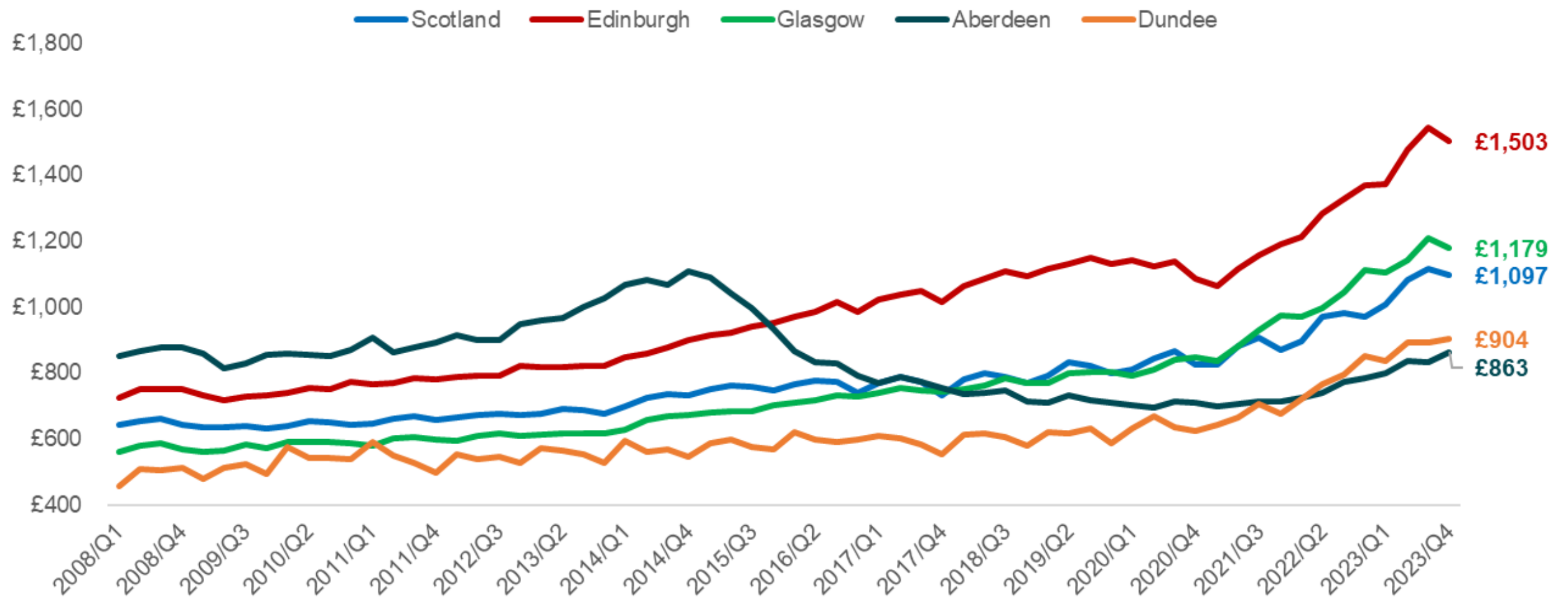
Index of Rettie & Co. Tenant Applications vs Rightmove New Rental Listings



Source: Rettie/Rightmove

Average Advertised Rents have Soared Across Scotland

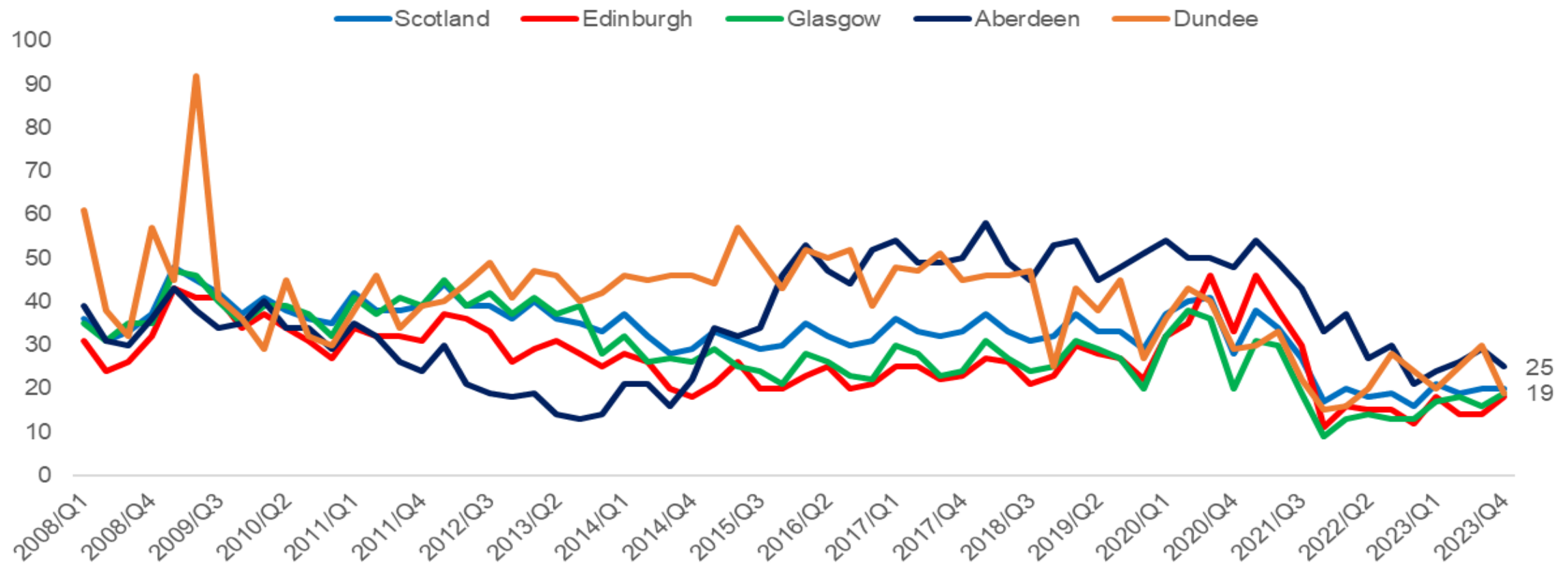
Average Advertised Rents in Scotland and Main Cities, 2007-23



Source: Citylets

Time to Let is at Historically Low Levels

Average TTL in Scotland and Main Cities, 2008-23



Source: Citylets

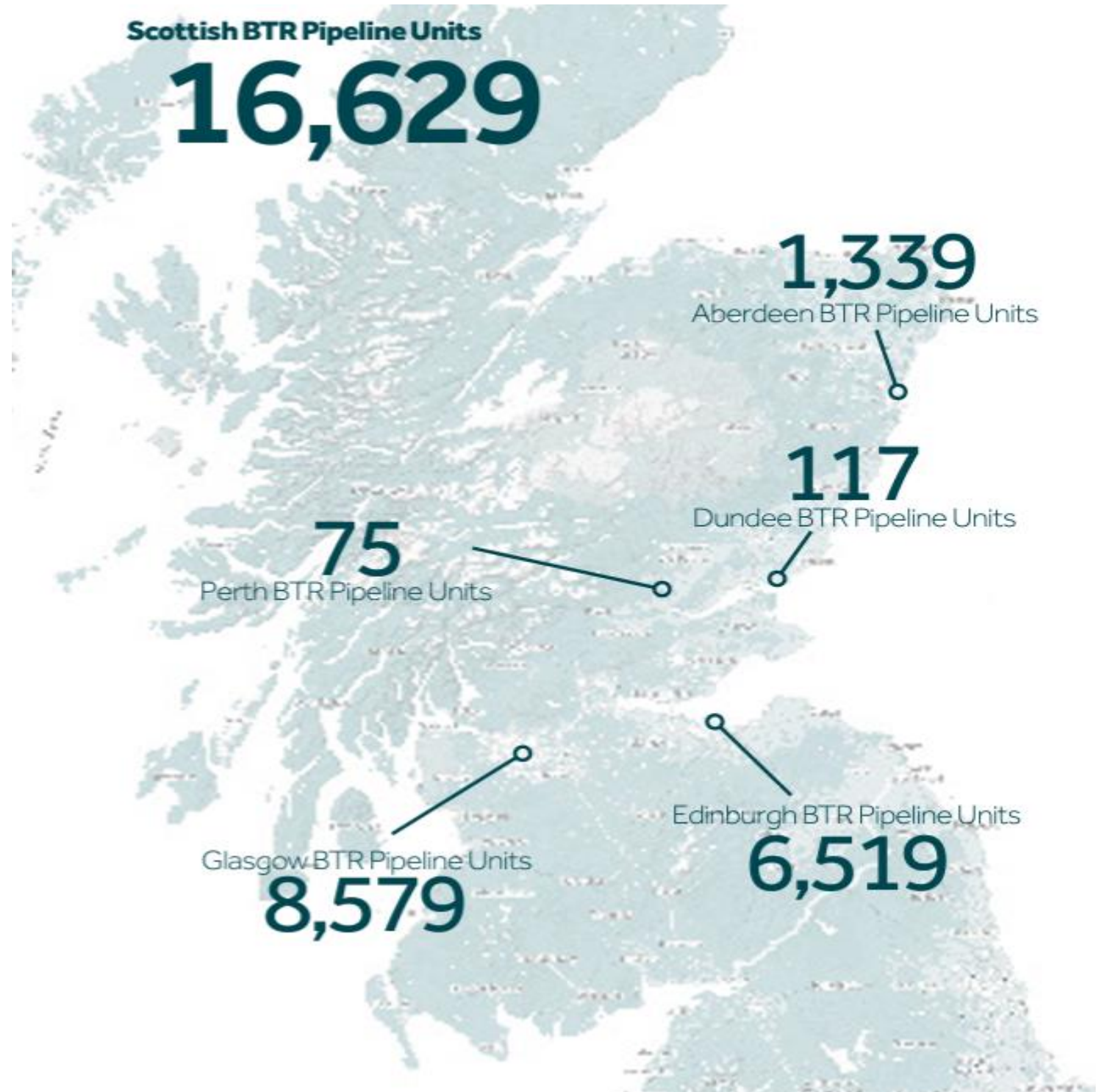
Can Institutional Investment be Part of the Solution?



BTR Pipeline & Operating Locations



- Glasgow 52%
- **Edinburgh 39%**
- Aberdeen 8%



Fundamentals Are Strong



Recent Colliers report on top locations for residential investment in UK has Edinburgh and Glasgow in First and Second positions

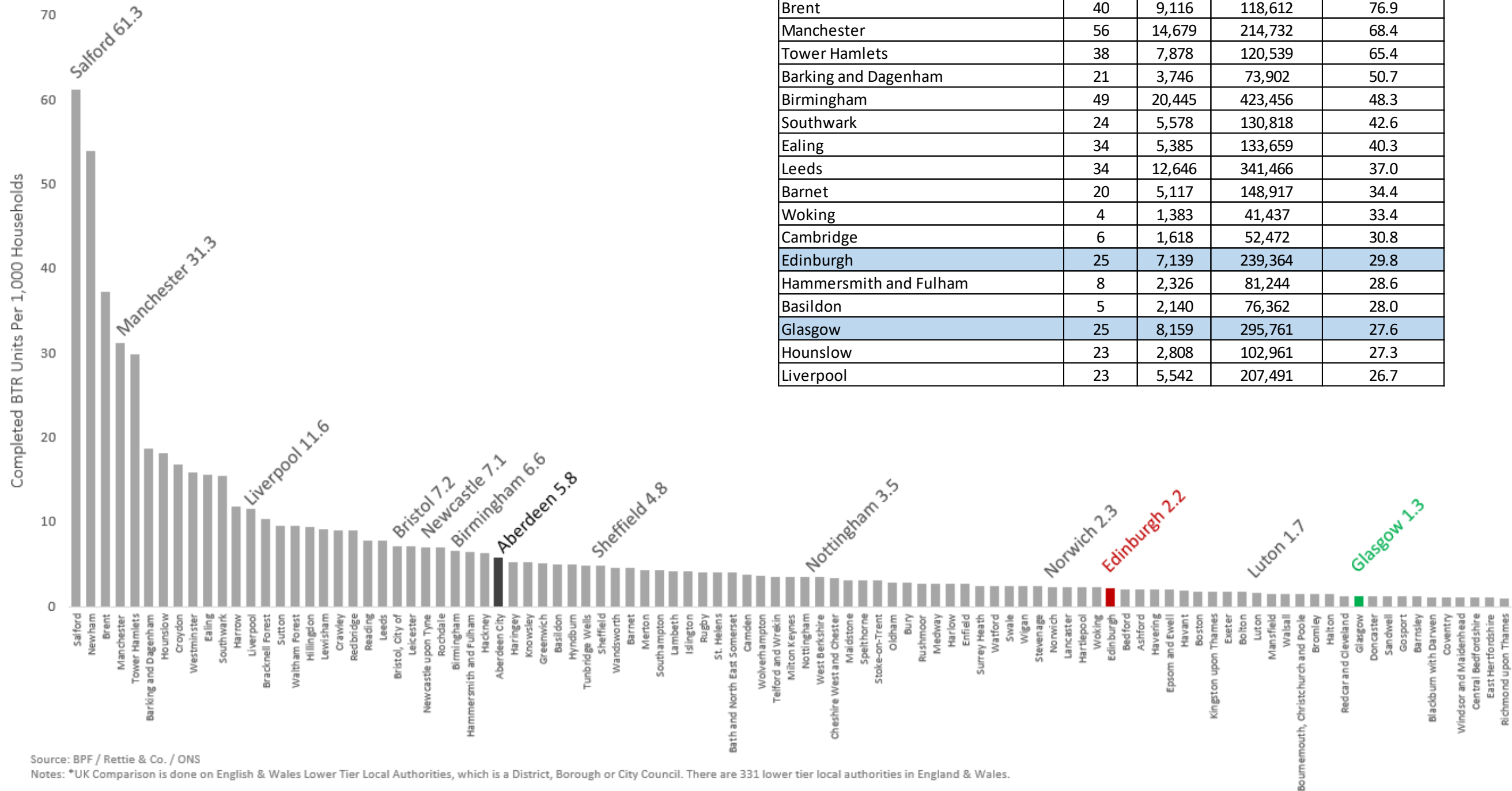
Source: Colliers

But Performance Is Weak



All Pipeline Units per 1,000 Households

Completed Units per 1,000 Households



Source: BPF / Rettie & Co. / ONS

Notes: *UK Comparison is done on English & Wales Lower Tier Local Authorities, which is a District, Borough or City Council. There are 331 lower tier local authorities in England & Wales.

Conclusion

**WE NEED TO DO STUFF TO
BOOST SUPPLY AND NOT DO
STUFF TO REDUCE SUPPLY!**

Contact john.boyle@rettie.co.uk



Dr John Boyle MRICS
Director, Research and Strategy

John leads the Rettie & Co Research Team, providing a cutting-edge research and consultancy function that informs clients on sales, lettings, investment and development opportunities and their viability, as well as providing analysis of where property markets are at and likely to be going. John has built up a wealth of experience from involvement at all stages of property projects, from small-scale developments through to major master-planned schemes of new towns and suburbs. John works for all major house builders in Scotland, the Scottish Government, many local authorities, RSLs and investors. John sits on the Homes for Scotland's Policy Advisory Group and is a member of the Royal Institution of Chartered Surveyors and the Society of Property Researchers.

The Blueprint for Independent Living

5 March 2024





Scottish Budget implies real-terms cuts to health spending – a fact not revealed in official documentation

Bee Boileau, David Phillips, Sam Ray-Chaudhuri, Tom Waters and Tom Wernham | Published on 6 February 2024

“Neighbourhood of the future” independent living model to launch in Glasgow

Millie York | 4th August 2022

Disabled people’s independent living is under threat. We must fight for it

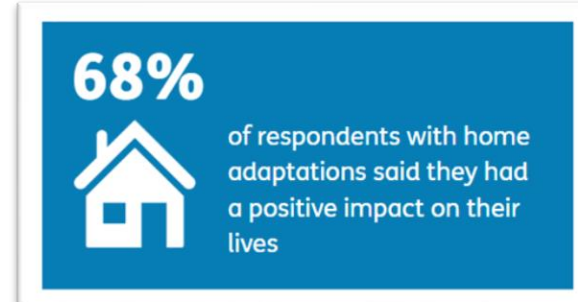
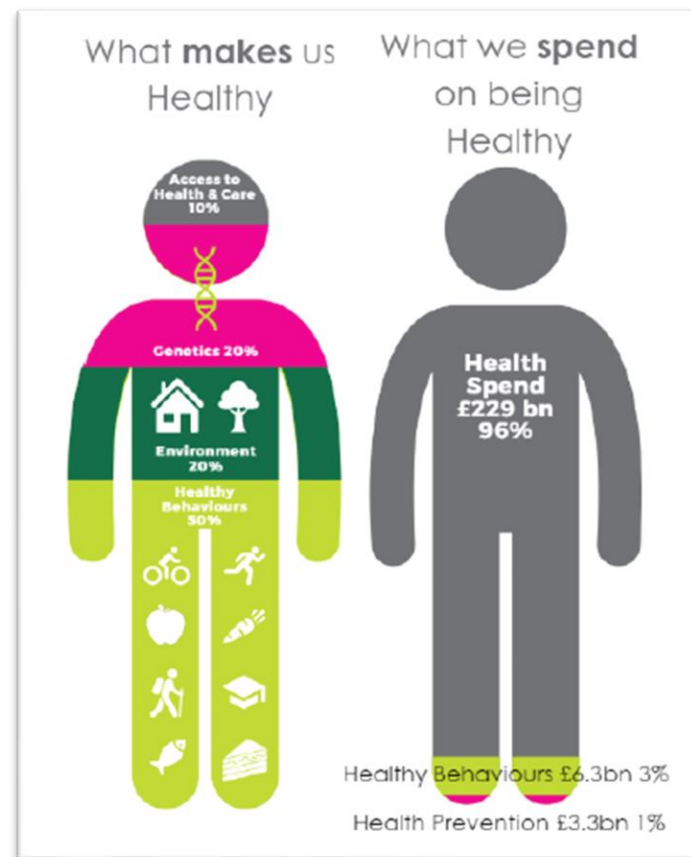
Cash-strapped councils may seek to put us in residential care to save costs, without regard for our wishes

Mikey Erhardt

22 September 2023, 9:55am

EXCLUSIVE: Academic collaboration can help people live more independently

Sarah Sarsby | 17th January 2022



Almost 40,000 disabled people on social housing waiting lists

16 FEB 2024 | Reading time: 3 minutes

Housing ombudsman in England calls to re-establish link between housing and health

Scottish Government must develop a clear national strategy for health and social care, says Audit Scotland

Projects that monitor the health of older people awarded funding to tackle the key impacts of ageing

Millie York | 22nd May 2023



The Blackwood Blueprint for Independent Living is our contribution to promoting innovation and best practice in independent living

What?

Showcase research, innovation and best practice from across the world

Positively **influence** public policy

Raise the **ambition** for independent living across sectors

Demonstrate ideal examples

How?

Neighbourhoods & Places

Health & Wellbeing

Design & Technology



Theme 1 – Neighbourhoods and Places

Homes

Design Guides

Adaptations

Community

Outdoor Space

Sustainability

The Award Winning
Blackwood House

Peoplehood – A £12m Co-
funded with UKRI project
creating neighbourhoods
for Independent Living

The Blackwood Design
Guide – helping create
Accessible, Affordable,
Beautiful Homes



Theme 2 – Health and Wellbeing

Health and Social Care

Prevention and Technology

Social Value

Workforce

Active Lives



24/7 Responder
Services



Value Exchange
Platform



MyLife Game



Theme 3 – Design and Technology

Data

AI and Machine Learning

Robotics

Internet of Things (IOT)

Everyday Technology

Robotics
Knowledge
Transfer
Partnership

Blackwood
Design Award

Lifestyle Alert
Project



Recommendations – We’ve got a few...

Neighbourhood & Place

The Blueprint recommendations

- 1 The recent consultation on accessible housing published by the Scottish Government aims to enhance the accessibility, adaptability, and usability of Scotland’s homes. **We call on housing providers to go beyond this standard** and provide homes that enable people to live independently as they age from today onwards
- 2 **We call on housing providers to involve people** with lived experience in the design of homes and neighbourhoods to ensure they meet their needs from today onwards
- 3 **We call on Scottish Government to increase investment** in the Blackwood House and other accessible homes by 2030, to ensure the 24,000 disabled people on the social housing waiting list in Scotland have access to a suitable home
- 4 **We call on everyone to campaign** for increased investment in accessible outdoor spaces that promote health and wellbeing for all from today onwards
- 5 **We call on Scottish Government to introduce** a set of independent living standards and practices for Scotland by 2030, supporting the aspirations of Housing to 2040
- 6 **We call on Scottish Government to recognise** that the current adaptations system in Scotland is complex, underfunded and difficult to navigate. **Invest in a new system** by 2030 that can respond quickly to meet peoples needs, prevent delayed hospital discharge and support people to live independently

Design & Technology

The Blueprint recommendations

- 1 **We call on housing, care and support providers to continue** to invest in easy-to-use digital technology - like Blackwood’s own CleverCogs™ system, that enable people with low levels of digital skills to take advantage of digital products and services
- 2 **We call on the NHS and Scottish Government to mainstream** remote patient monitoring by 2030 - to free up hospital beds, upskill the social care workforce and enable people to recover in their own home
- 3 **We call on housing providers to continue** to invest in low cost shared WiFi/broadband to enable digital connectivity, IoT and support digital care systems like CleverCogs™
- 4 **We call on housing, care and support providers to utilise** Personal Data Stores from today onwards - enabling people to have control, portability and visibility of their data and its use
- 5 **We call on care and support providers, supported by the CCPS, to campaign** for interoperability and common data standards across all health and wellbeing systems from today onwards - ideally introducing a legal requirement on all software systems vendors
- 6 **We call on everyone to demand** full transparency on how AI is used - what data it collects and how this data is hosted, shared and used. Reject any systems that don’t comply with this transparency.
- 7 **We call on the NHS and Scottish Government to implement** AI and machine learning to provide early warning of decline by 2033 - to provide systems that monitor activities of daily living . Use AI to support decisions in healthcare, freeing up time for clinicians

Health & Wellbeing

The Blueprint recommendations

- 1 **We call on care and support providers, supported by the CCPS, to campaign** to increase the base rate of pay for Support Workers by 2024 to ensure Social Care can attract and retain the talent that it requires for the future
- 2 **We call on care and support providers, supported by the CCPS, to create** new roles that focus on prevention and wellbeing to reduce the burden on social care and health services from today onwards
- 3 **We call on the CCPS, SFHA and CIH to create** tailored training and support for the Health and Social Care and Housing workforces by 2025 - by equipping the workforce with the skills needed to support the new technology we will ensure scalability.
- 4 **We call on care and support providers to lead** by example with organisational leaders championing the adoption of digital tools and technologies in care settings making digital leadership an essential criteria of the role from today onwards
- 5 **We call on care and support providers to introduce** career development pathways that identify, encourage and reward the development of essential digital skills from today onwards
- 6 **We call on care and support providers to recognise** and celebrate Support Workers who successfully integrate technology into their practices. Share their stories to inspire other and build a positive action towards technology supported care from today onwards
- 7 **We call on Scottish Government to recognise** the valuable role housing support has in maintaining independent living and along with **Housing providers adopt** the recommendations made in the UK Collaborative Centre for Housing Evidence - The economic and social benefits of housing support report by 2025



Charleston, Dundee Independent Living In Place

66 new homes to the Blackwood House standard

Access to digital care and support

A socially and digitally connected community



Funding the model (Is it possible?)

- ❑ Most existing funding routes are distinct and specific
- ❑ Cost/benefit analysis of preventative action is difficult
- ❑ “a balance is struck between the level of services provided, the cost of the services, and how far current and prospective tenants and service users can afford them”
- ❑ Innovative streams and grant funding are still there
- ❑ Place is key – start small and prove your theory
- ❑ “tenants, owners and other customers receive services that provide continually improving value for the rent and other charges they pay.”





Blackwood was founded 50 years ago by Dr Margaret Blackwood MBE who understood first-hand the challenges of living with a disability and wanted to improve life for herself and others.

The Blueprint for Independent Living is both a legacy of the last five decades of learning and a vision for the next five to fifty



Blackwood

homes | care | support

