CIH ideas lab:
from customer portals to digital switchover - how does your digital agenda compare with others?

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30 September 2020

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structure of today's ideas lab

► Background

► Research methodology

► Who participated

► Results:

 • Current position

 • Future digital priorities

 • Awareness and approach to Digital Switchover

► Implications for social housing providers

► Panel discussion, including Q&A

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background: why we did this survey

▶ The social housing sector has much to gain from digital innovation:

- cost efficiencies

- greater property management insights

- improved resident satisfaction – more choice in how to access services

▶ Most providers already have some kind of digital agenda

▶ However, there are barriers to increasing digital engagement

▶ The 2025 Digital Switchover may require major investment but offers huge opportunities to adopt new approaches

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background: what is 'digital switchover'?

► Digital Switchover is the term used to represent a programme of changes being undertaken by the telecoms industry in the run up to 2025

► The analogue telephone network will be switched off and all calls will be made by VoIP (Voice over Internet Protocol)

► This not only affects all landline telephone calls but also several other services provided by social housing providers

► Most hard wired alarm systems use analogue technology and may not work from 2025

- 'warden' intercom/call systems

- dispersed alarm systems

- door entry

- smoke alarms

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background: about Alertacall

- Founded in 2004 and based in the North West

- Provide services to around 50 housing providers across the UK

- Deployed in around 20,000 properties

- Suppliers of the award winning housing management service Housing Proactive

- Designed for properties occupied by older residents and other higher needs groups

- Deliver Digital Switchover ready solutions at substantially lower costs

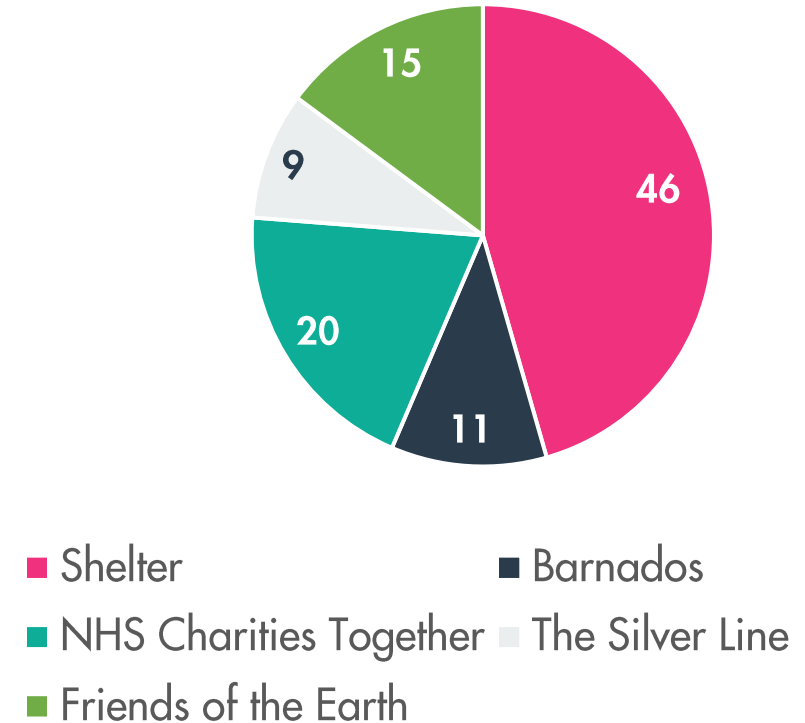- Ideas Lab 3: Preparing for Digital Switchover – November 2020

95% of customers surveyed would recommend our service to a friend

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research methodology

► Smart Survey online questionnaire piloted in July 2020

► Survey issued in August to 3000+ housing sector staff

► Deadline for completion 23 September

► Respondents were offered 2 incentives:

- A £5 charitable donation for each completed questionnaire

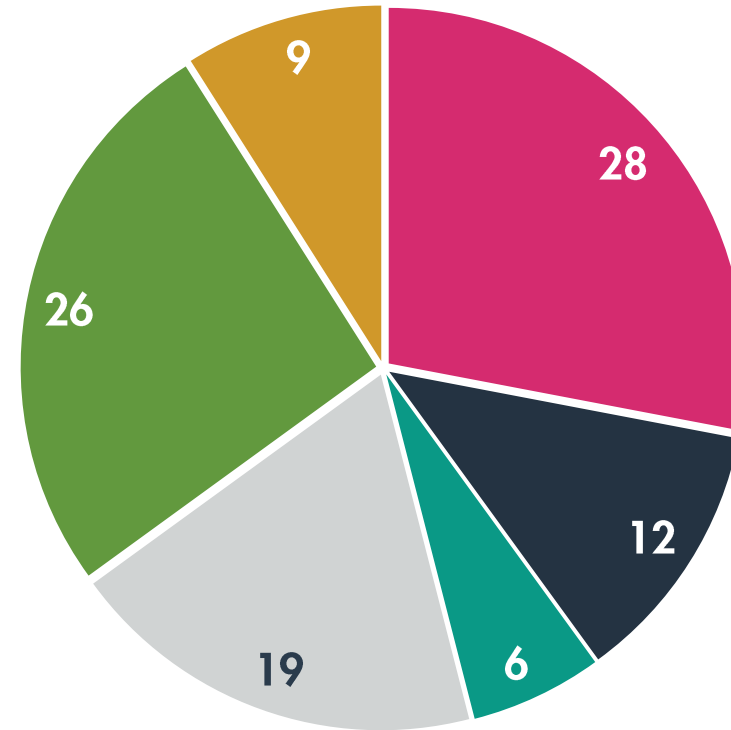- A copy of the final research report

Split of donations (%)

- Shelter
- Barnados
- NHS Charities Together
- The Silver Line
- Friends of the Earth

46
11
20
9
15

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who responded to the survey

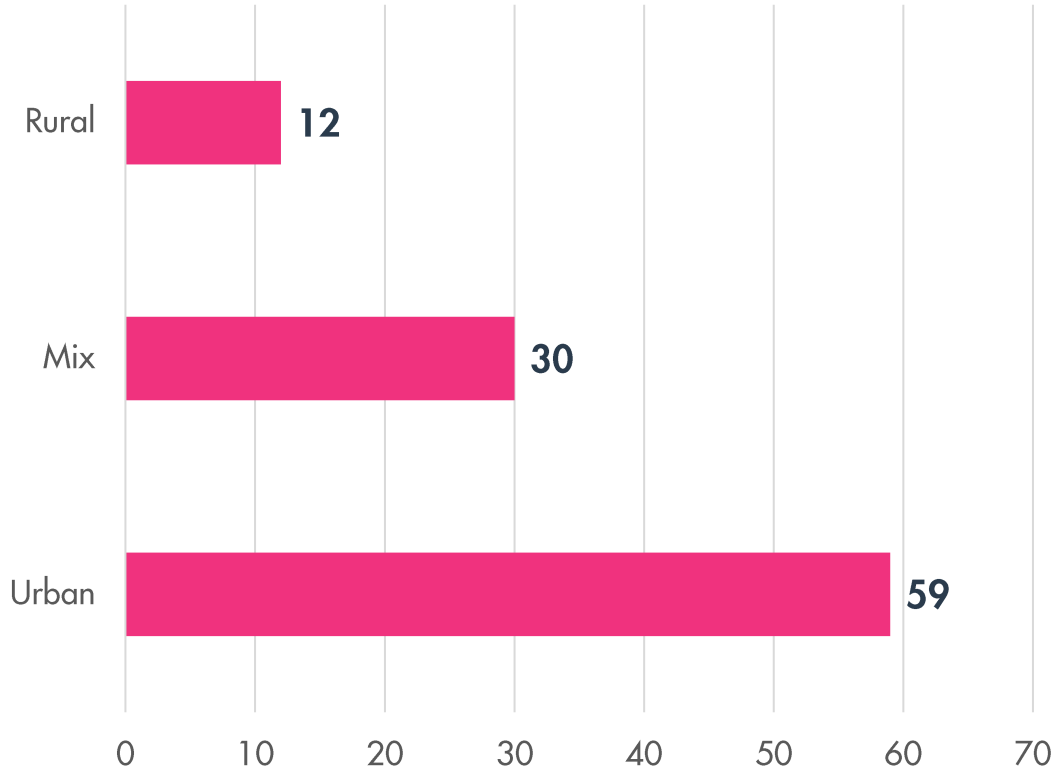## 233 responses in total included in the analysis

Which of the following most closely relates to your role? (%)

- Executive Director/Senior Leadership Team
- Head of Housing
- Head of IT/Digital Engagement
- Supported Housing/Independent Living Manager
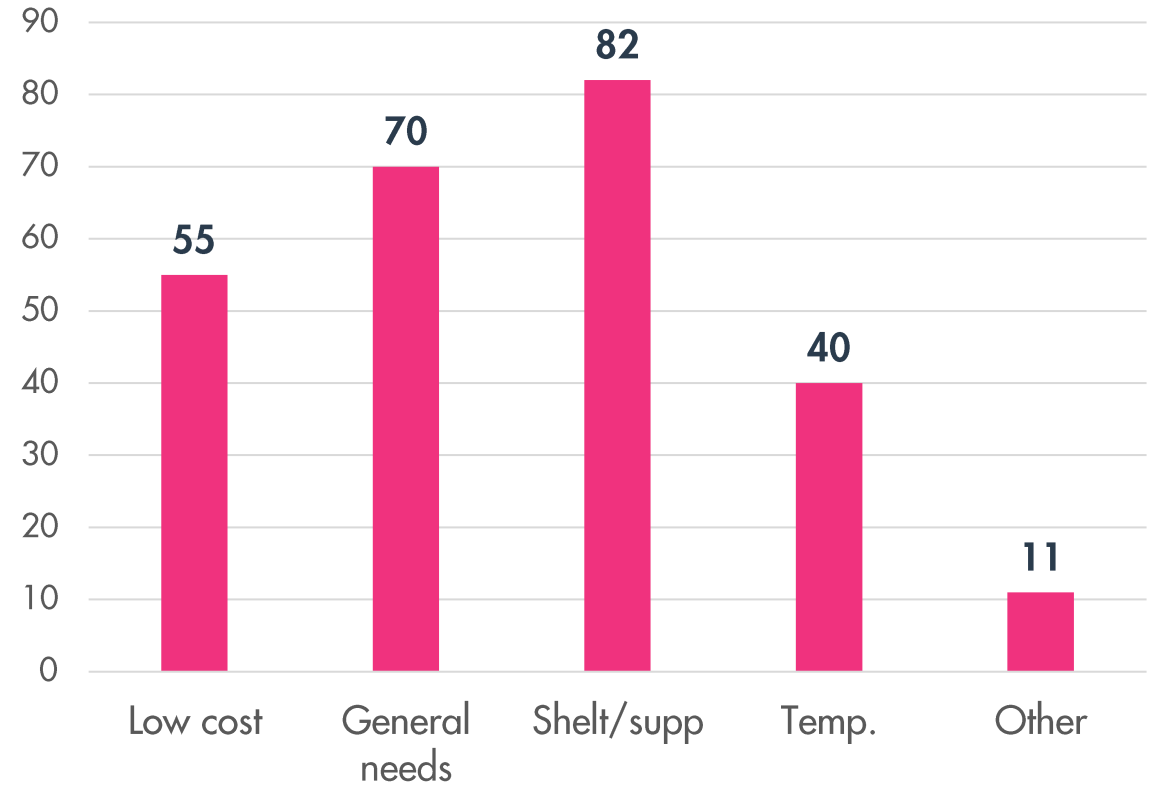- Other
- Prefer not to say/NA

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current position

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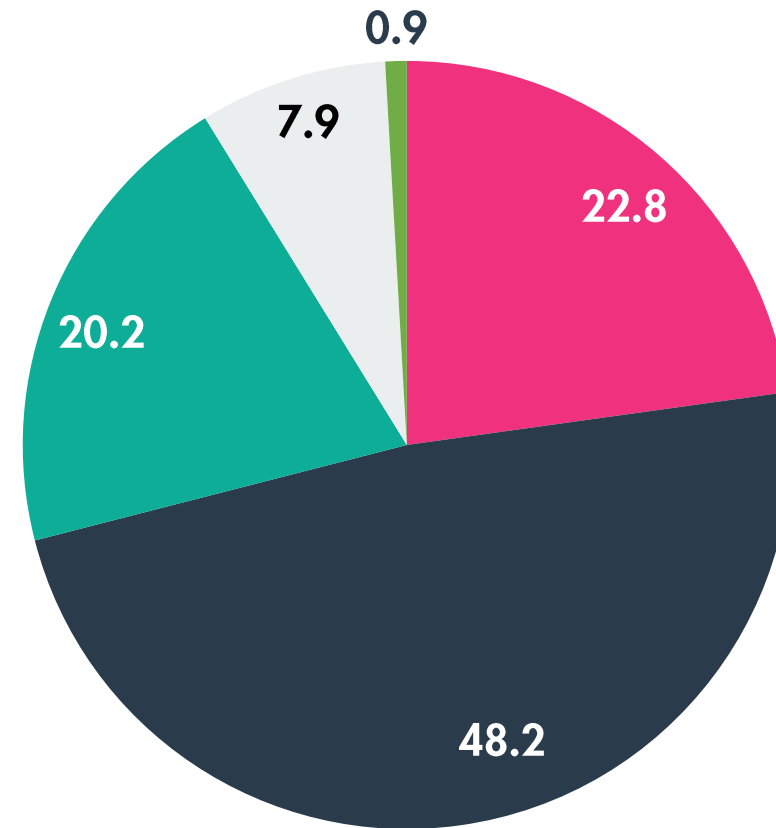
digital engagement across the sector

When it comes to digital engagement with customers (residents) do you think the social housing sector as a whole is ahead or behind other industries? (%)

- Well behind other sectors
- A little behind
- Equal to other sectors
- A little ahead
- Well ahead of other sectors

22.8
48.2
20.2
7.9
0.9

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digital engagement:
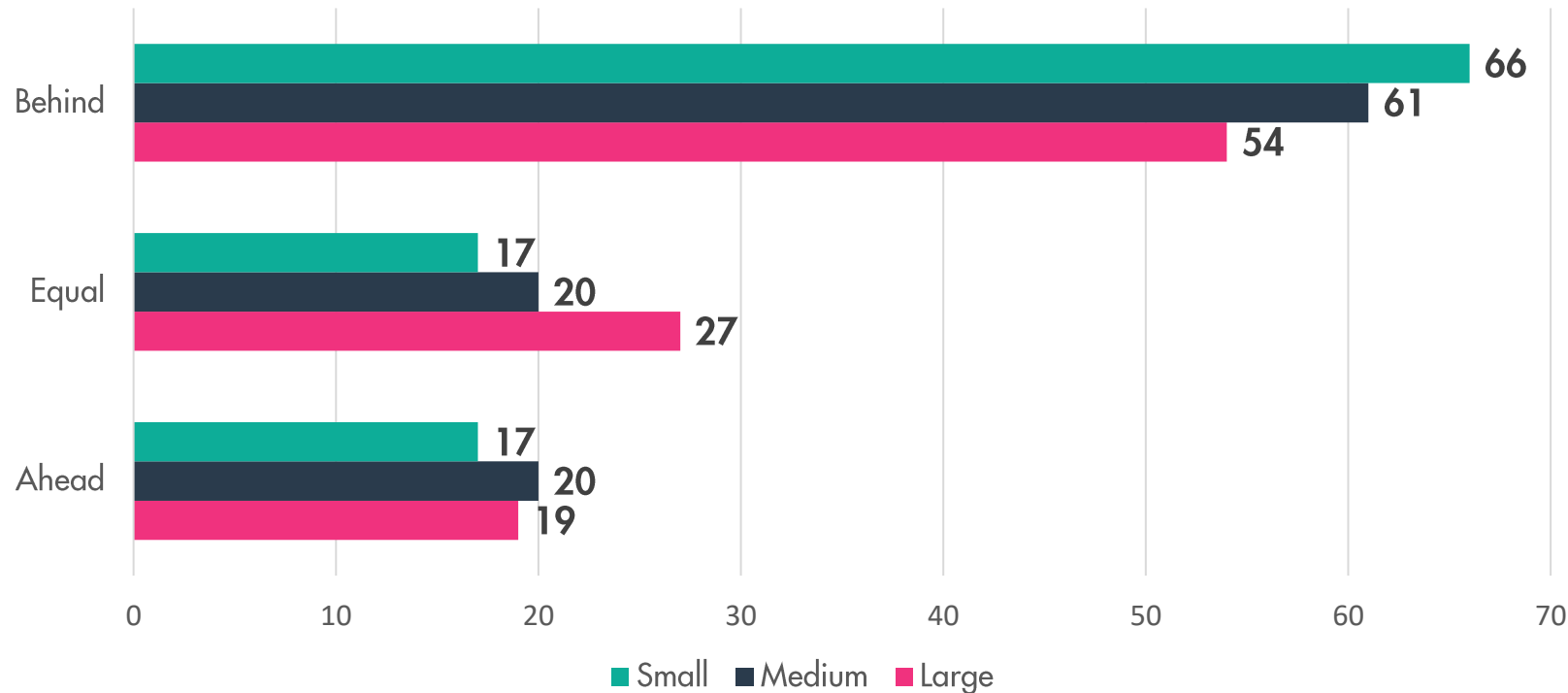# your organisation compared to the sector

When it comes to digital engagement with customers (residents) do you think your organisation is ahead or behind others in the social housing sector? (%)

- ■ Well behind other sectors
- ■ A little behind
- ■ Equal to other sectors
- ■ A little ahead
- ■ Well ahead of other sectors

1.3

16.7

39.5

23.7

18.9

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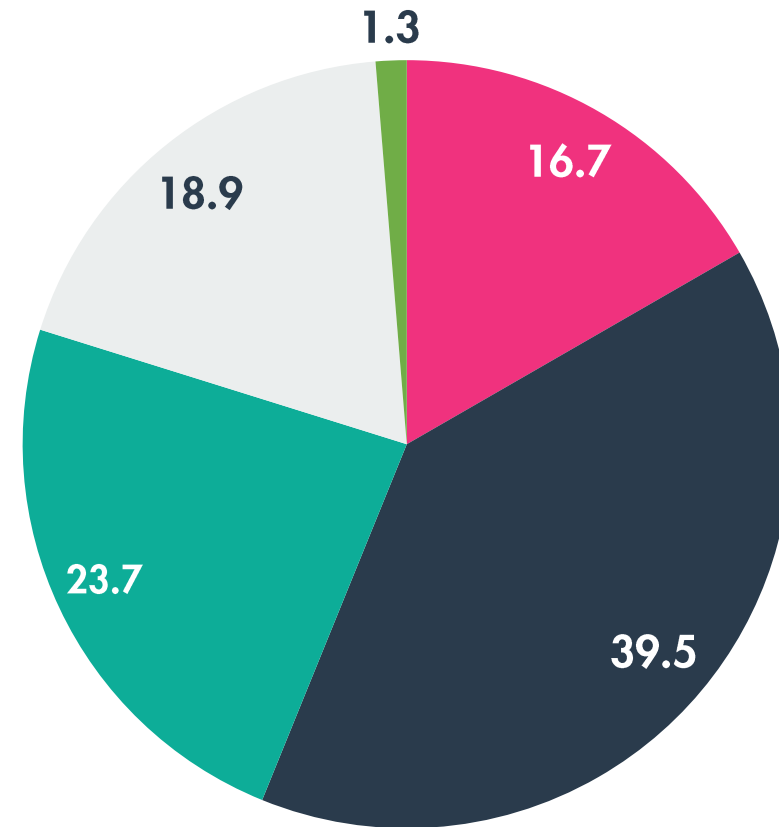
smaller providers with fewer resources are more likely to feel they are behind

How do you compare with other providers? (%)

Category	Small	Medium	Large
Behind	66	61	54
Equal	17	20	27
Ahead	17	20	19

Legend: ■ Small ■ Medium ■ Large

Few are taking comfort that even if the sector is behind they are ahead of their peers

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while it is standard to provide devices to staff most do not for residents – will this be a barrier?

Current Digital Capabilities (%)

|	Most/all	Some
Device for staff	67	17
Resident website (area)	45	12
Customer app	27	11
Free wifi in comm areas	18	45
Digital training for tenants	18	45
Free wifi in homes	10	21
Digital door entry	10	51
Free device for tenants	6	39
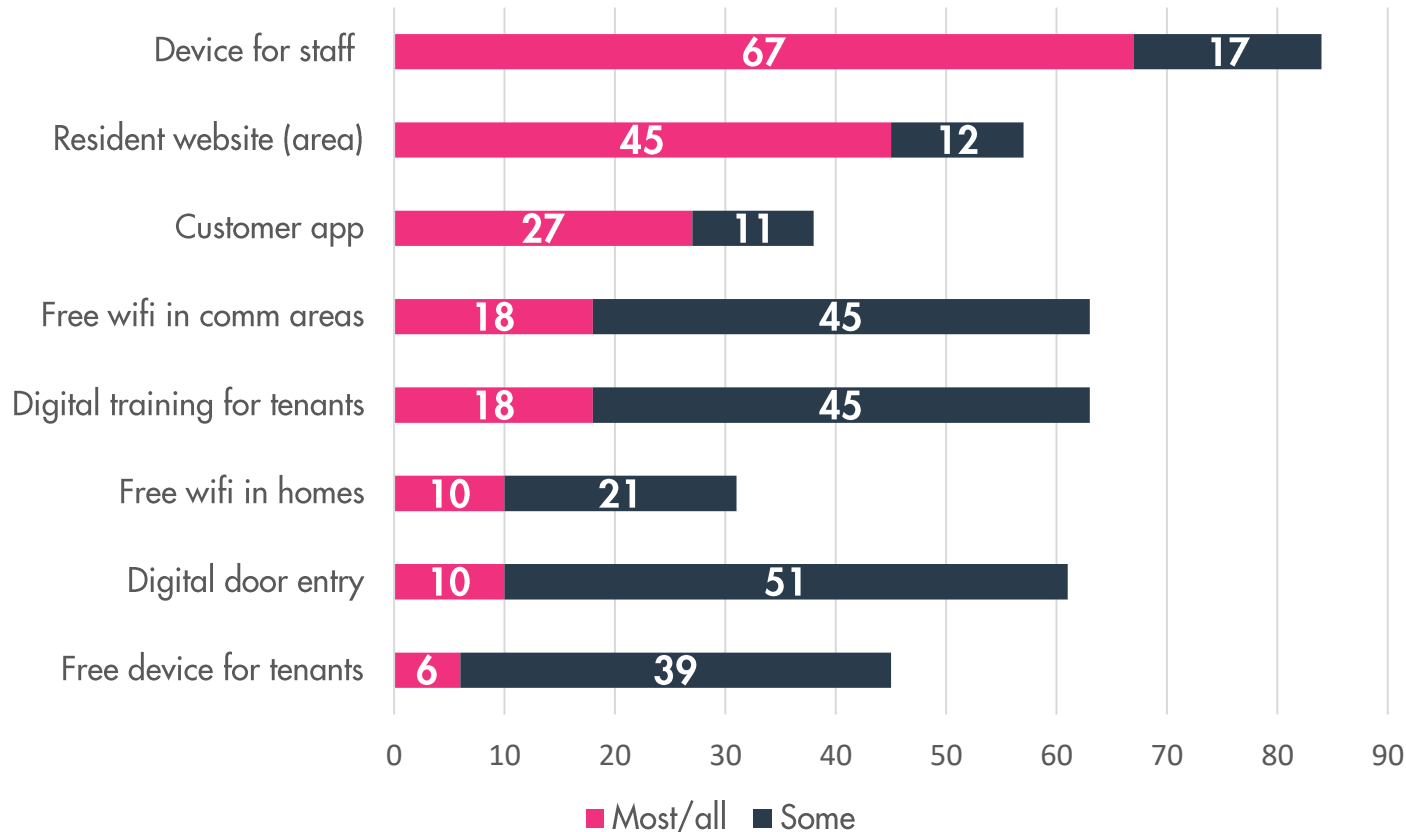
- Two thirds provide devices to most or all staff
- Resident apps and websites are not yet the norm
- Extra facilities in some areas, however…
- Potential risk of higher needs groups without devices or connectivity being left out

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current usage of apps/portals is largely unknown but is thought to be low – driving this up is the key to realising efficiencies

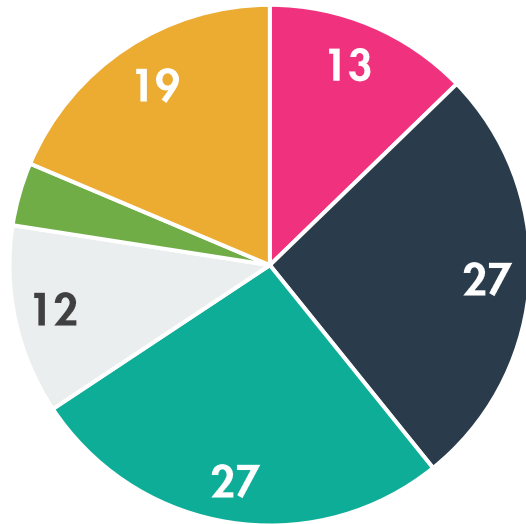**% of residents using app/portal in past 12 months**

Bar chart values:
- <5%: 3
- 5-10%: 7
- 10-20%: 16
- 20-50%: 14
- >50%: 6
- Don't know: 55
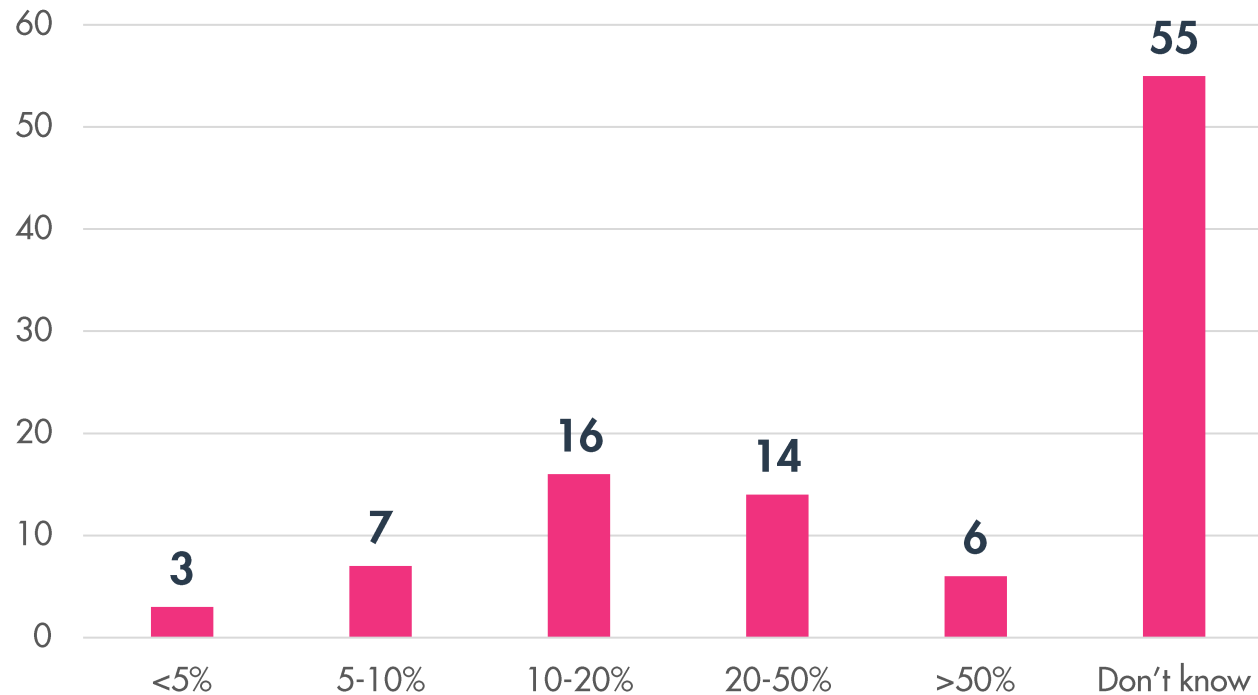
Have no app/portal 37% (chart based on only those with an app/portal)
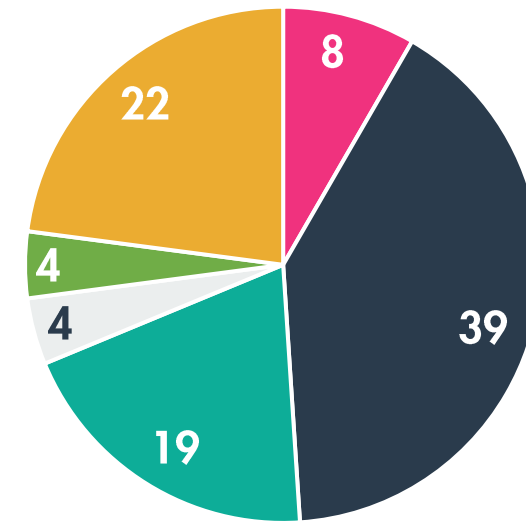
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almost half see their resident website/app as easy to use, though low usage may contribute to 1 in 5 not knowing

All providers (%)

- Very user friendy
- Quite user friendly
- Average
- Not very user friendly
- Not at all user friendly
- Don't know

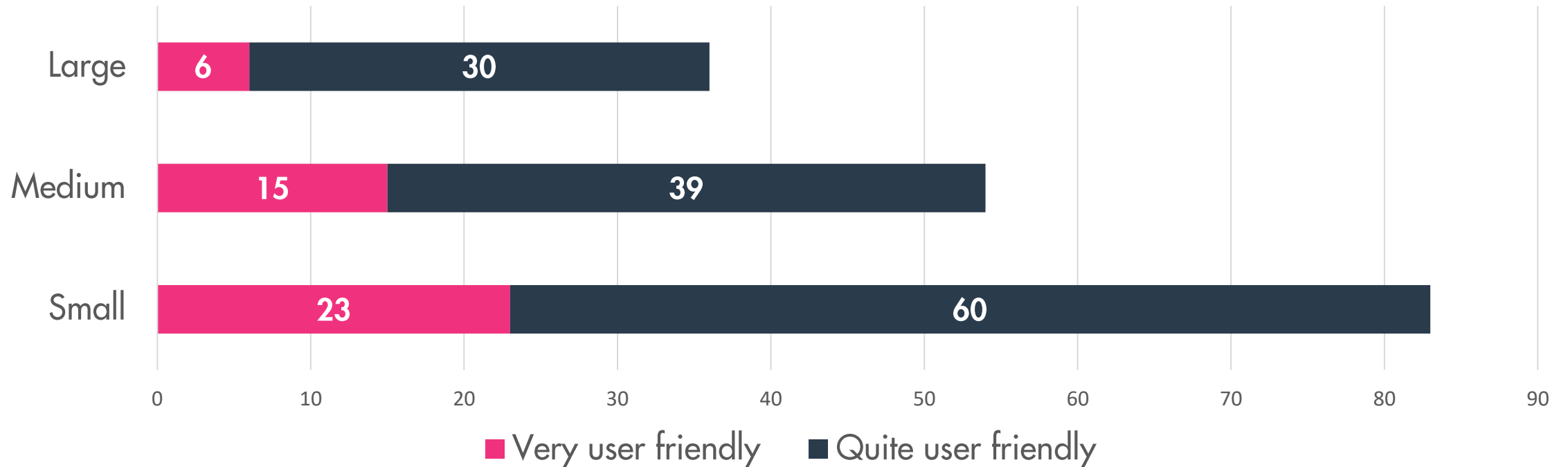## Sheltered/supported providers (%)

- Very user friendy
- Quite user friendly
- Average
- Not very user friendly
- Not at all user friendly
- Don't know

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future digital priorities

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the main priorities are to improve internal processes and offer digital options to residents

## How important are the following to your organisation? (%)

	Very	Quite
Digitising internal processes	54	35
Self service portal	45	32
Replacing alarms	37	31
AT/Telecare	36	34
Resident digital training	33	50
Video links with residents	31	39
Broadband	24	47
Digital door entry	14	38
Smart in home devices	14	34
5G	9	21

■ Very   ■ Quite

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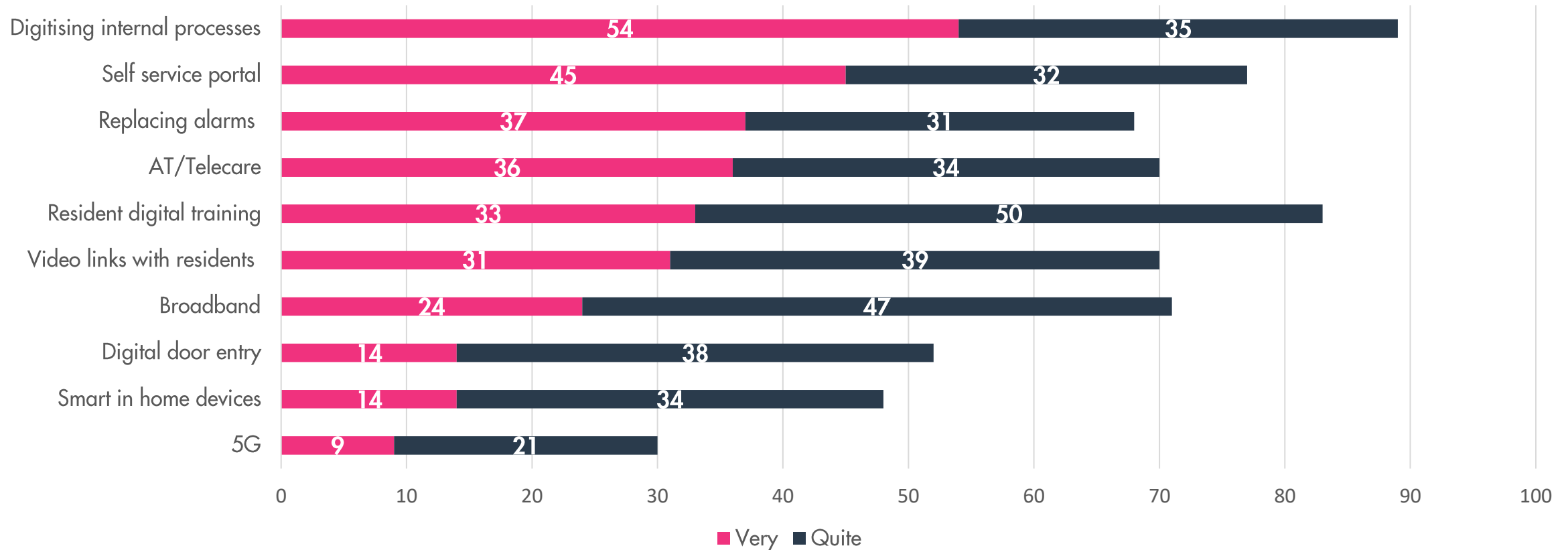
almost all expect to provide devices to staff, and most plan (or already have) resident websites and apps

Staff devices (%)
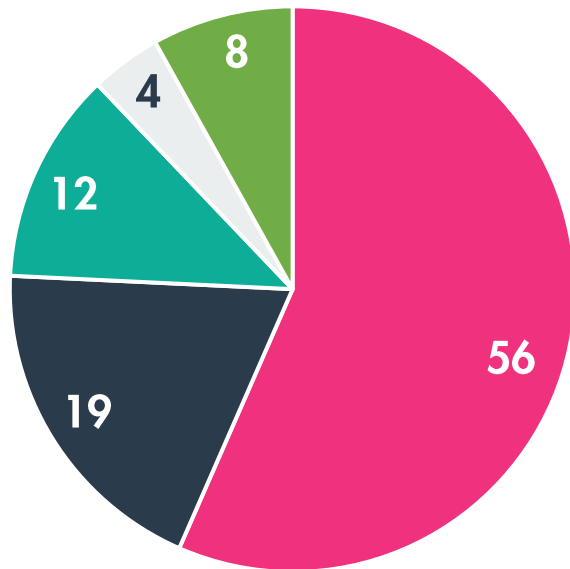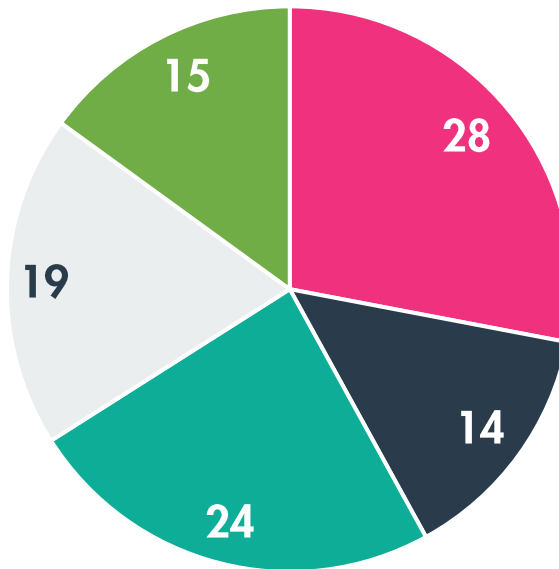
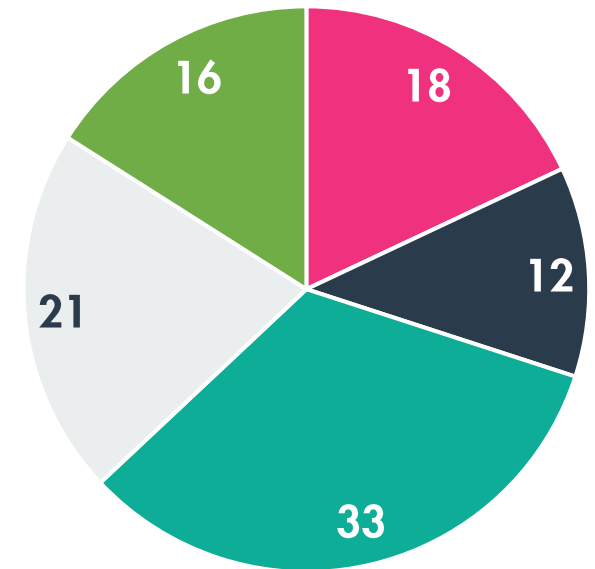56, 19, 12, 4, 8

Resident website (%)

28, 14, 24, 19, 15

Resident app (%)

18, 12, 33, 21, 16

- In place now
- Expand
- Introduce
- No plans
- Don't know

- In place now
- Expand
- Introduce
- No plans
- Don't know

- In place now
- Expand
- Introduce
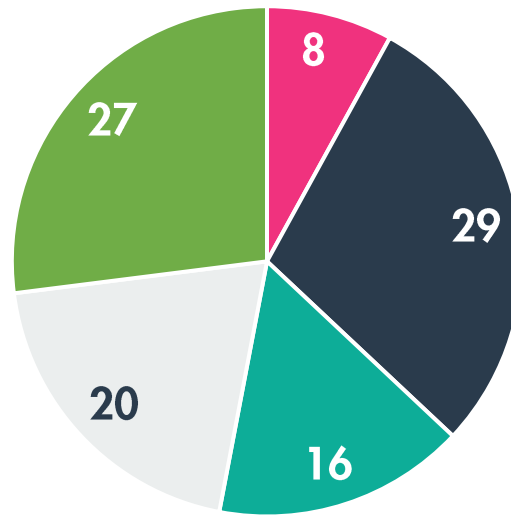- No plans
- Don't know

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around half plan to invest in digital innovations, including devices for residents

Digital door entry (%)

- 15 (In place now)
- 25 (Expand)
- 11 (Introduce)
- 22 (No plans)
- 27 (Don't know)
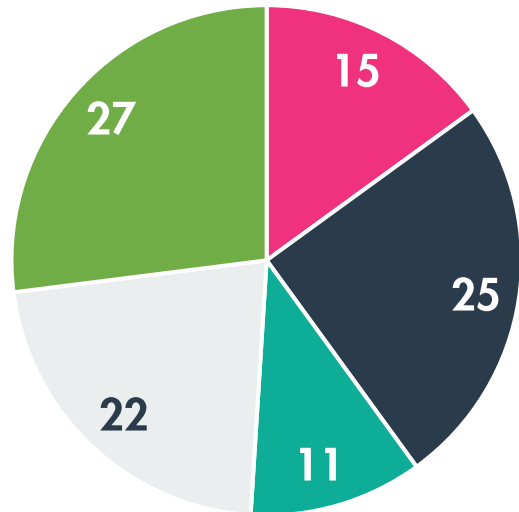
Legend:
- In place now
- Expand
- Introduce
- No plans
- Don't know

Digital Assistive Technology (%)

- 8 (In place now)
- 29 (Expand)
- 16 (Introduce)
- 20 (No plans)
- 27 (Don't know)

Legend:
- In place now
- Expand
- Introduce
- No plans
- Don't know

Free device for residents (%)

- 7 (In place now)
- 25 (Expand)
- 12 (Introduce)
- 36 (No plans)
- 19 (Don't know)

Legend:
- In place now
- Expand
- Introduce
- No plans
- Don't know

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communal WiFi is see as a priority but only a third plan for free/inclusive WiFi in homes

Digital training (%)

16, 30, 20, 18, 15
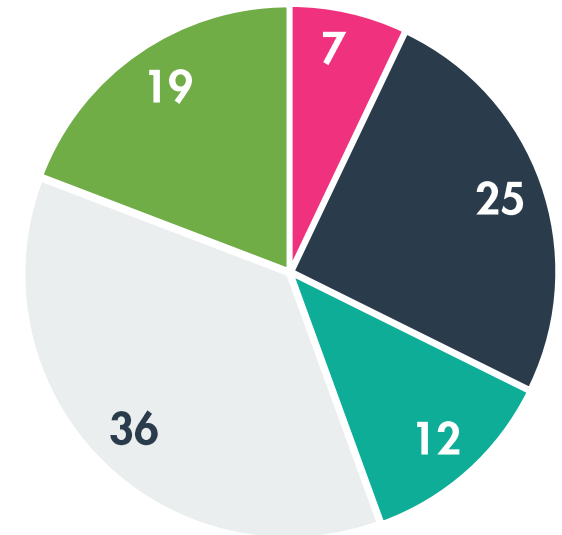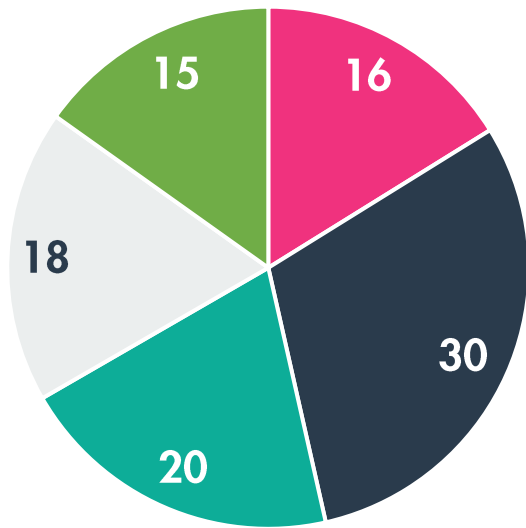
- In place now
- Expand
- Introduce
- No plans
- Don't know

Communal WiFi (%)

20, 28, 11, 25, 15
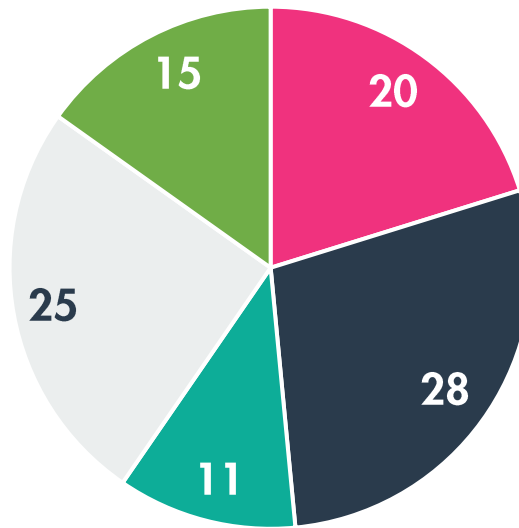
- In place now
- Expand
- Introduce
- No plans
- Don't know

Free/inclusive WiFi in homes (%)

10, 14, 10, 41, 25

- In place now
- Expand
- Introduce
- No plans
- Don't know

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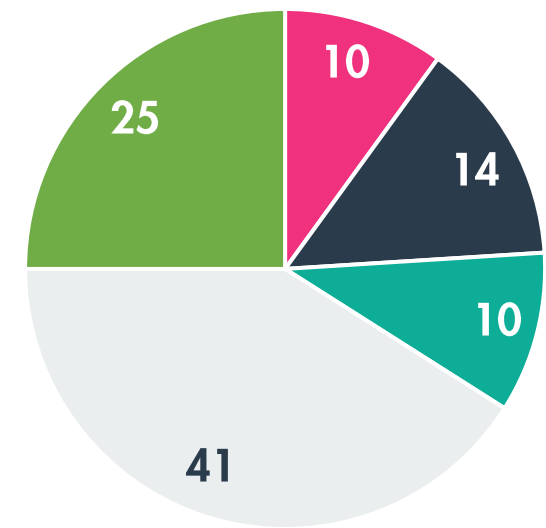
the drive to develop digital capability will be a catalyst to reduce costs in more expensive channels

Future channel strategy (%)

	Add and retain	Withdraw FTF	Withdraw Tel	Make digital only	Don't know
All	50	23	10	13	25
Exec	45	13	13	13	17

■ All ■ Exec

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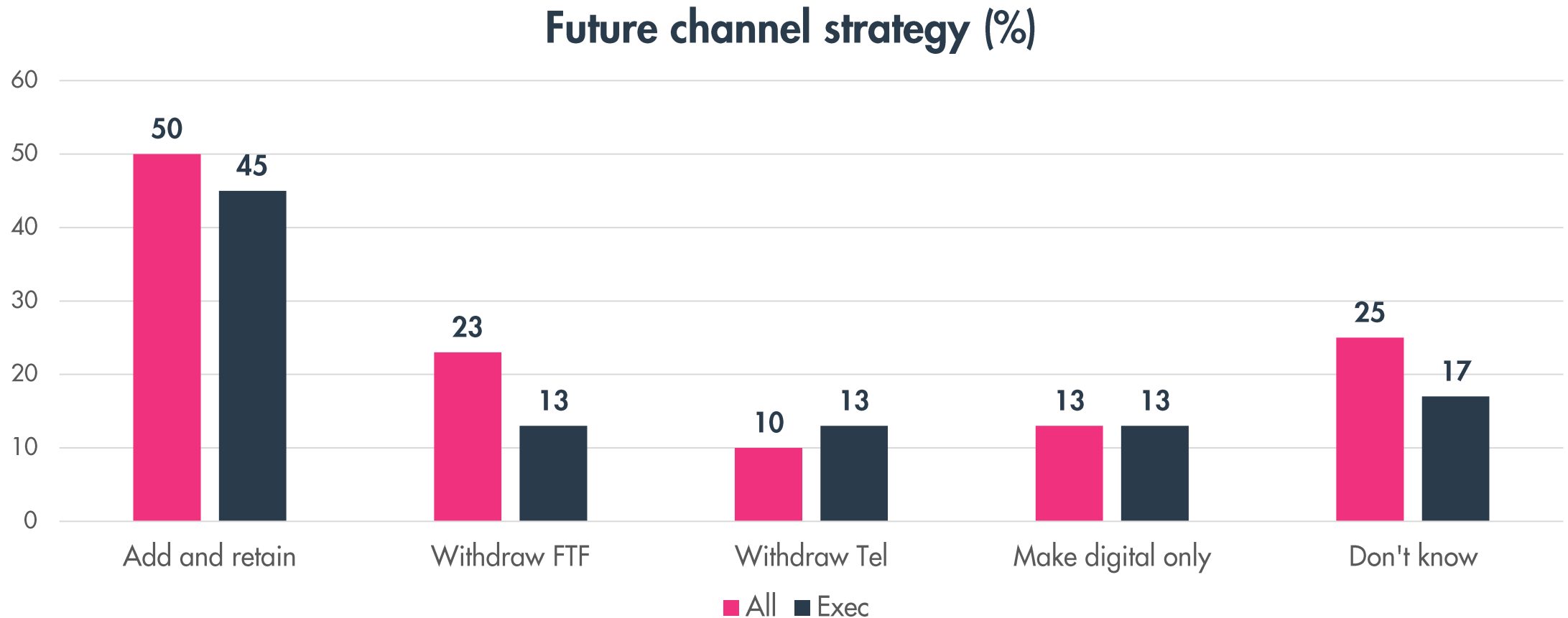
there are many hurdles to increasing digital engagement - having a suitable digital device being the biggest

Barriers to digital engagement (%)

Barrier	%
Suitable device	72
Connectivity	64
User friendly	40
Cost of devices	37
Prompting usage	35
Not accessing app	21
Creating isolation	19
Not downloading app	12
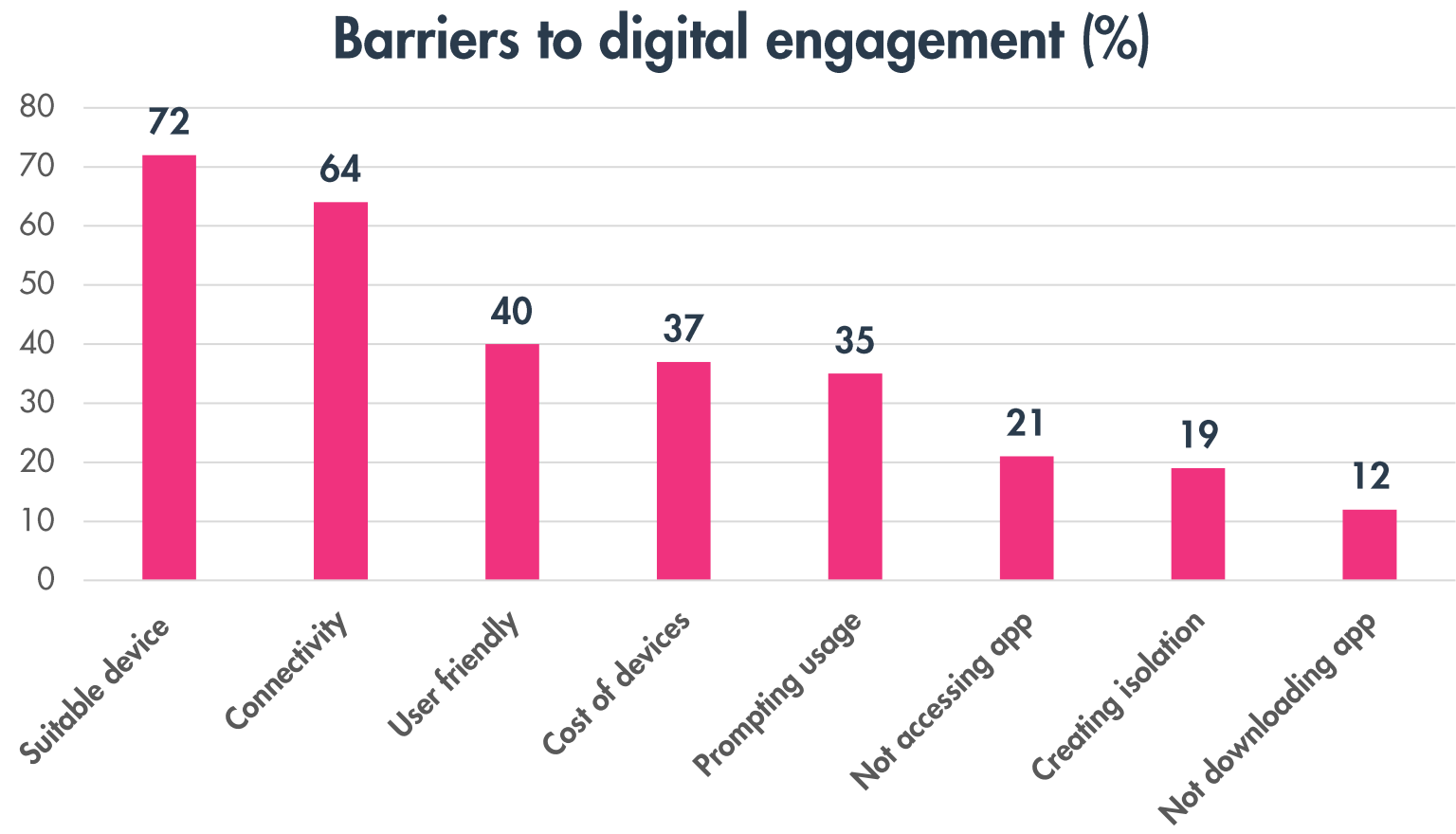
Digital Engagement: 8 challenges and how to overcome them

How social housing providers can improve service delivery and create efficiencies

JUNE 2020

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digital switchover

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just over half are aware of digital switchover – including amongst executive teams
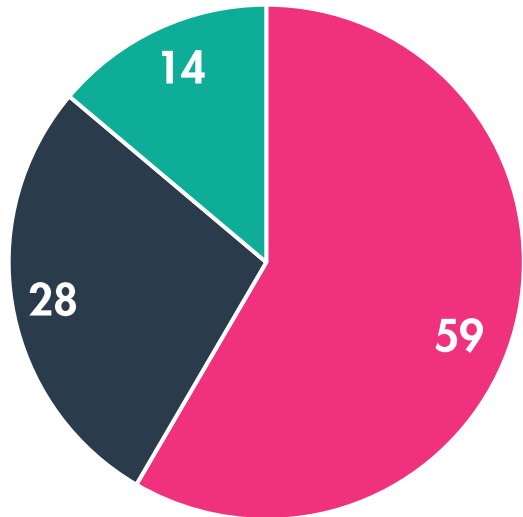
Aware of Digital Switchover (%)
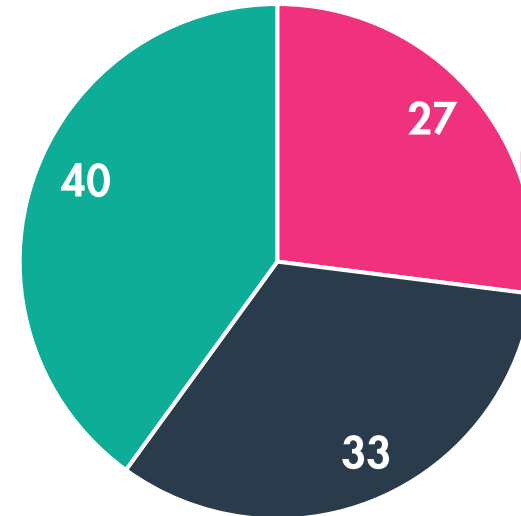

- Yes
- No
- Don't know

9
34
57
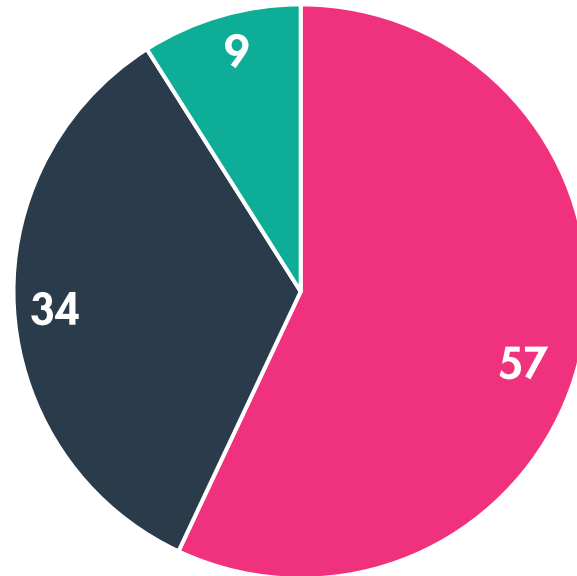
Fewer than 1 in 6 social housing providers have a digital project that has digital switchover in its scope

Do you have a digital engagement project? (%)

- 59
- 28
- 14

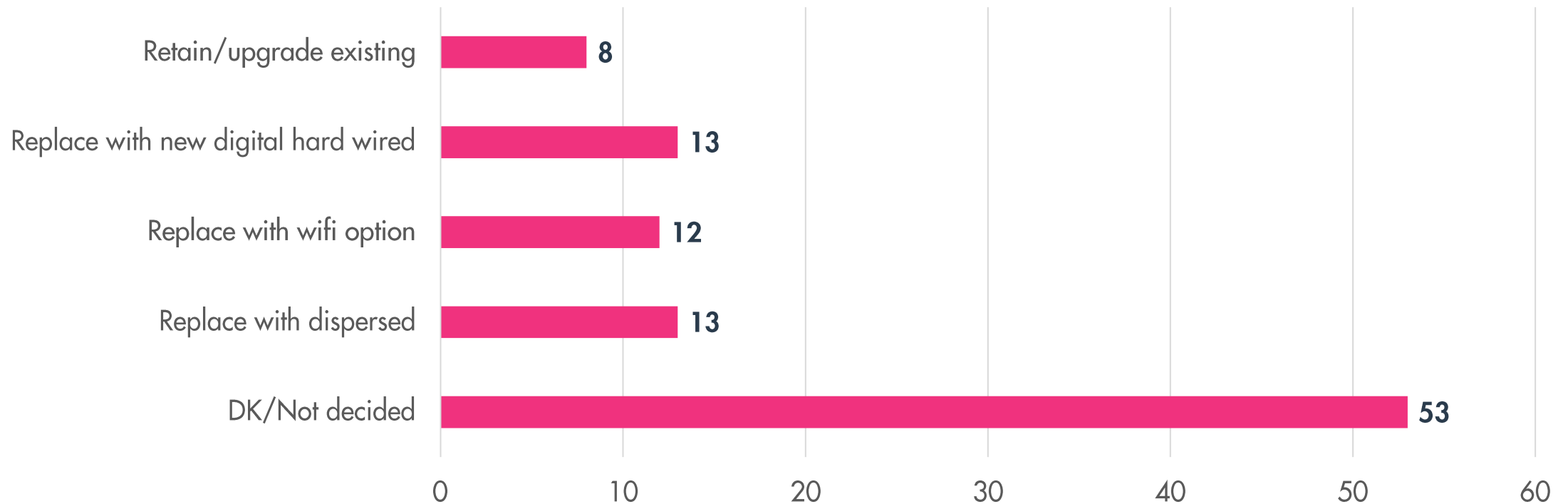■ Yes ■ No ■ Don't know

Does the scope include digital switchover? (%)

- 27
- 33
- 40

46% for those who feel ahead of others

■ Yes ■ No ■ Don't know

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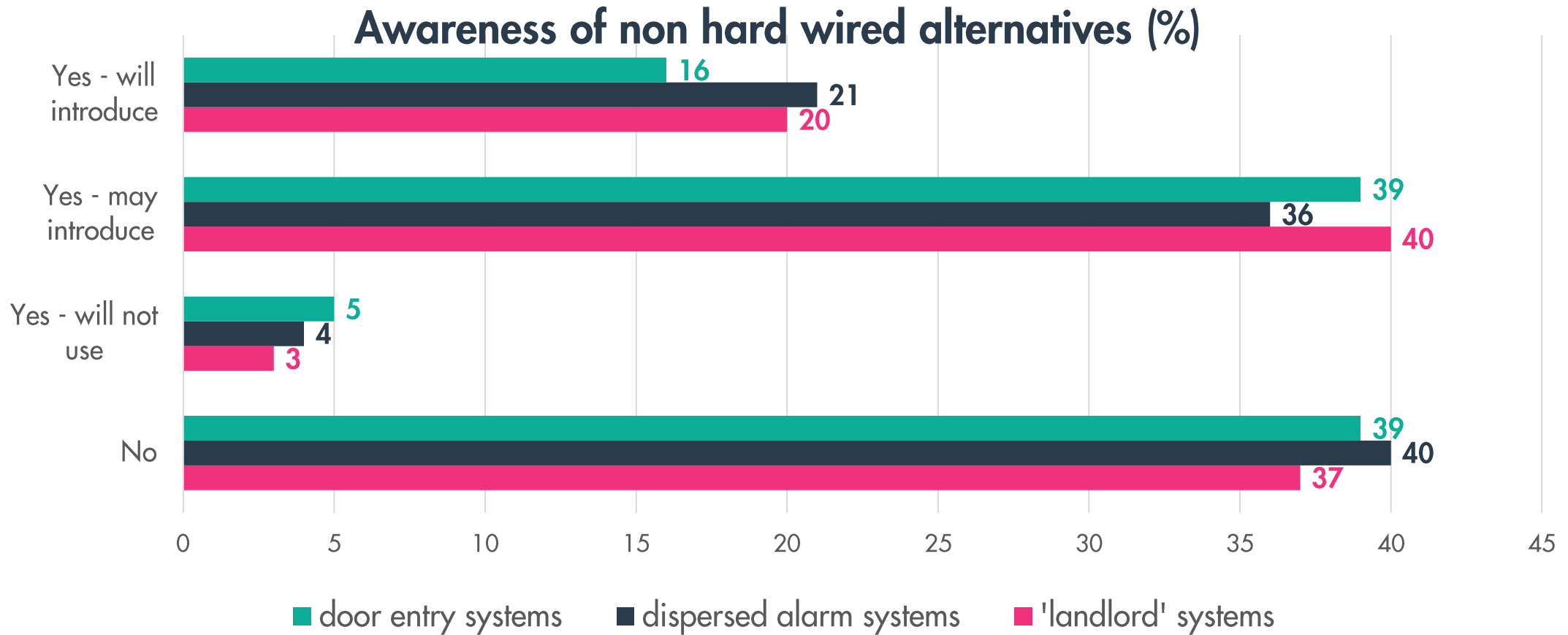
just 8% expect to retain or upgrade their existing hard wired systems, but most are yet to decide

Plan for hard wired systems (%)

Category	Value
Retain/upgrade existing	8
Replace with new digital hard wired	13
Replace with wifi option	12
Replace with dispersed	13
DK/Not decided	53

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implications for social housing providers

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implications for social housing providers (1)

▶ There is clear consensus that the sector is behind others in adopting digital technology – COVID-19 has brought home some of the implications.

▶ Providers who feel they are behind others in the sector are less likely to have projects that incorporate the requirements of Digital Switchover.

▶ Around half have an app or website for residents though a significant proportion think these could be easier to use – a figure that rises with the size of the provider.

▶ Digital improvement plans appear primarily driven by internal efficiencies though barriers to increasing resident engagement are widely acknowledged. This suggests there may need to be incentives to encourage greater adoption.

▶ The biggest of these is residents not having a suitable device though only a minority plan to offer devices themselves - **Alertacall is tackling this by providing devices (inc. touchscreens) at no cost to end users of its services**

▶ Connectivity may be an issue in the future (2 million homes in the UK have no internet connectivity). 10% currently offer free/inclusive WiFi and this is expected to rise to over third.

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implications for social housing providers (2)

► One in 8 plan to make certain processes digital only, and half expect to withdraw some channels of access.

► Tracking of digital engagement is currently low profile – most do not know how successful their app/portal is, but believe engagement to be low.

► Over a third are unaware of Digital Switchover even amongst executive teams, yet for a larger providers the costs could run into ten of millions in the next 5 years.

► The replacement of hard wired alarms systems is a top 5 priority, though awareness of the alternatives and their cost and functionality very variable.

► The majority have yet to decide what approach to adopt with hard wired systems.

► Given most providers revise service charges in line with financial years it will almost certainly be too late to make changes for 2021 – giving just three more opportunities prior to 2025.

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panel discussion and Q&A

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thank you for joining us!

For any questions or follow up, please get in touch:

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martin@alertacall.com