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# **THE PREFERENCES, POSITIONS AND PRIORITIES OF RESIDENTS OF EXTRA CARE AND RETIREMENT HOUSING**

**A Q METHODOLOGY STUDY TO EXPOSE, EXPLORE AND SEEK EXPLANATIONS FOR THE MICRO PREFERENCES,  
MESO POSITIONS AND MACRO PRIORITIES OF OLDER PEOPLE LIVING IN AFFORDABLE AND SOCIAL RENTED  
EXTRA CARE AND RETIREMENT HOUSING PROPERTIES IN ENGLAND**

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## **Abstract**

**This thesis seeks to provide insights into the interdependence of the micro preferences, meso positions and macro priorities of older people living in affordable Retirement Housing and Extra Care properties in England.**

**Despite Extra Care and Retirement Housing being long established and much discussed forms of specialist housing provision for older people, there still appears to be a lack of clarity or understanding about why these forms of provision exist, what services and facilities they should provide and how to address the priorities of the residents who live in them.**

**In order to expose and explore the mix of similar and different perspectives of residents and avoid the study being confined to existing theories and assumptions, Q methodology was adopted to support an abductive research strategy. Q studies were undertaken with 68 Extra Care residents from 5 sites and 157 Retirement Housing residents from 11 sites to provide the variables that were subject to factor analysis.**

**Patterns of preference are identified that provide an indication of the features and aspects of living in Extra Care or Retirement Housing that influence micro level satisfaction within different segments of the population of residents. The extent and basis for consensus or divergence of meso perspectives within and between sites and communities are revealed in order to give scope to speculate about how and why these differences occur. A second order analysis of factors also gives insight into tensions inherent in the macro intent and purpose of older people living in Extra Care or Retirement Housing.**

**The results and conclusions provide the basis for proposing a theoretical model that recognises the interdependence of micro, meso and macro perspectives and provides a means to combine them in order to gain an integrated appreciation of the preferences, provision and purposes of Extra Care and Retirement Housing.**

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# Chapter 1

## Intent, Interest and Investigation

*This chapter introduces the aim and intent of this thesis to understand the preferences, positions and priorities of residents of Retirement Housing and Extra Care properties. It sets out my personal motivations as well as the demographic, policy and practical imperatives for undertaking this study. It makes the case for an abductive approach to generate new insights from a resident perspective and provides an indication of how the thesis intends to address this. The chapter also provides an overview and guide to the content and structure of the rest of the thesis.*

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## **1A: My Intent and Interest**

### **1A.1 My Aim and Intent**

I embarked on the research journey that led to this thesis wanting to expose and explain the priorities and perspectives that older people living in social rented and affordable Extra Care and Retirement Housing settings have about where they live. Although Extra Care and Retirement Housing are familiar forms of provision that have been the subject of considerable evaluation and exploration in previous research, there remains a lack of clarity about the aspirations of the people who live in this type of specialist housing provision, what facilities and services this accommodation should offer and even more fundamentally why it exists. My aim was to take a fresh look at these issues and seek a basis to establish a better understanding.

I took the view that it was preferable to forego the certainties of prior wisdom for the potential to discover new possibilities, so rather than being limited to research strategies that made the tracks and grooves of existing knowledge wider or deeper, I went 'off-piste' with the methodology and research strategy adopted in search of alternative vistas and theories with which to survey the territory. My intention is that, by offering insights and innovation in the assessment and conceptualisation of the subjective opinions and preferences of residents, I might inform future policy, provision and practice with regard to specialist housing for older people.

### **1A.2 My Motivation and Position**

Although this thesis is not about me, it is relevant to disclose at the outset my perspective and position since, as Weick (1995, p20) suggests, who I am will inevitably have influenced my attitude and approach to this research. It is now the norm for researchers to identify themselves and acknowledge any differential in power or status between themselves and the participants in their studies (e.g. Rosaldo, 1989; Van Maanen, 1998). Having previously encountered difficulties with divided loyalties when undertaking insider research (Moore, 2007) I am aware of the importance of confessing my motivation and relationship with the research being undertaken.

I have worked in leadership roles concerned with the provision of specialist housing for older people for over 25 years. Whilst undertaking the research and studying for this PhD I was also employed as the Chief Executive of Housing 21<sup>1</sup>, which is a large not-for-profit provider of Extra Care and Retirement Housing specifically for older people of modest means operating throughout

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<sup>1</sup> When the research was commenced 'Housing 21' was called 'Housing & Care 21', but in April 2019 it changed its name back to Housing 21 (the name that it had previously been known by since 1992 up to 2014) and to avoid confusion this is the name of the organisation that will be used throughout this thesis.

England. I have previously served as Chief Executive of Hanover Housing Association and Deputy Chief Executive of Anchor Trust which are also major national providers of specialist housing for older people<sup>2</sup> as well as a trustee/board member of a Bristol based specialist provider of care and housing for older people (Brunelcare) and Deputy Chair of Age UK (Birmingham).

Whilst Chief Executive of Hanover Housing Association, I expressed the view (Moore, 2013, p10) that providers of specialist housing for older people were “complicit in the process of making assumptions and imposing solutions” and noted that “with the best of intentions, professionals often assume they know best and organisations have an inherent tendency to just carry on doing more of what they did previously”. I had also previously concluded (Moore, 2010, p12) that providers “often put the cart before the horse and ... end up telling older people what service they are going to get, rather than asking what they want”. I suggested that not only are older people living longer than they did some 50 years ago, but their attitudes and expectations had also been dramatically transformed by new social, economic and political realities over the past half century or more, which meant that providers of specialist housing for older people could not simply expect to carry on doing what they had done before. Whilst these views set the premise for my desire to undertake this study, it wasn’t until 2017, having completed a PhD in social policy in which I had used Q methodology to consider the ‘Competing Perspectives on the Governance Role of Boards of English Housing Associations and Attitudes to Board Payment’ (Moore, 2017), that I saw the potential to use Q methodology to address them. I then felt compelled to embark on this new research journey to explore these concerns.

I am fortunate that my position as Chief Executive of a major provider of Extra Care and Retirement Housing not only gave me an appreciation of the issues affecting these services, but also provided me with ready access to potential study sites and residents, as well as other stakeholders. I have, however, been conscious that this privilege also came with a responsibility to ensure that I did not abuse my status or allow this to affect the integrity of my research. This has been demonstrated in my approach to the recruitment and obtaining the informed consent of participants, as well as my research strategy and methodology that sought to avoid simply reaffirming or imposing the biases and preconceptions of my own world view.

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<sup>2</sup> Anchor Trust and Hanover Housing Association subsequently merged in November 2018 to form The Anchor Hanover Group

## **1B: The Significance of Specialist Housing for Older People**

### **1B.1 Why This Thesis?**

It is important to establish why research to study the perspectives and priorities of residents of affordable and socially rented Extra Care and Retirement Housing properties should be regarded as a necessary and worthy undertaking.

This investigation is required because long-standing contradictions and inconsistencies in perceptions about the nature, purpose and efficacy of specialist housing for older people still persist. In 1983 Tinker (1983, p291) considered that uncertainty and questions about the provision of sheltered housing were not only being experienced by the people who lived in this form of accommodation, but also by those that commissioned and delivered it. This echoed the challenges and conflicts of provision and purpose that had been exposed by Butler et al (1983) after an extensive four year study funded by the Joseph Rowntree Memorial Trust and the Centre for Policy on Ageing. Fifteen years later, the Audit Commission (1998) concluded that there was still no clear vision for the future of sheltered housing or evidence that it was being considered as a part of a wider strategic approach to the provision of services for older people. In 2016, the year before I commenced this research, the All Party Parliamentary Group on Housing and Care for Older People produced a third 'HAPPI Report' (Best and Porteus, 2016, p9) which recognised that, despite the powerful arguments that had been made for good design<sup>3</sup> and a compelling economic case<sup>4</sup> for more and better homes specifically for older people, there were still concerns about loss of autonomy and control, costs and charges, the provision of care and support services and the imposition of institutional and old fashioned management practices. Unless these issues are resolved, Extra Care and Retirement Housing will continue to appear as confused propositions and lack the clarity required to address the fundamental questions about why these forms of provision exist, what services and facilities they should provide and how to address the priorities of the residents who live in them.

The subject of this study is also considered worthwhile because, as the population ages it is necessary to ensure that the housing and support options available to older people are both sufficient and suitable. Even though most older people live in general rather than specialist housing and are home owners rather than tenants of housing associations, the provision of social and affordable rented Extra Care and Retirement Housing is not unsubstantial, so questions about how this resource should be utilised or further developed are important considerations. The

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<sup>3</sup> HAPPI (Homes and Communities Agency, 2009) Housing our Ageing Population Panel for Innovation

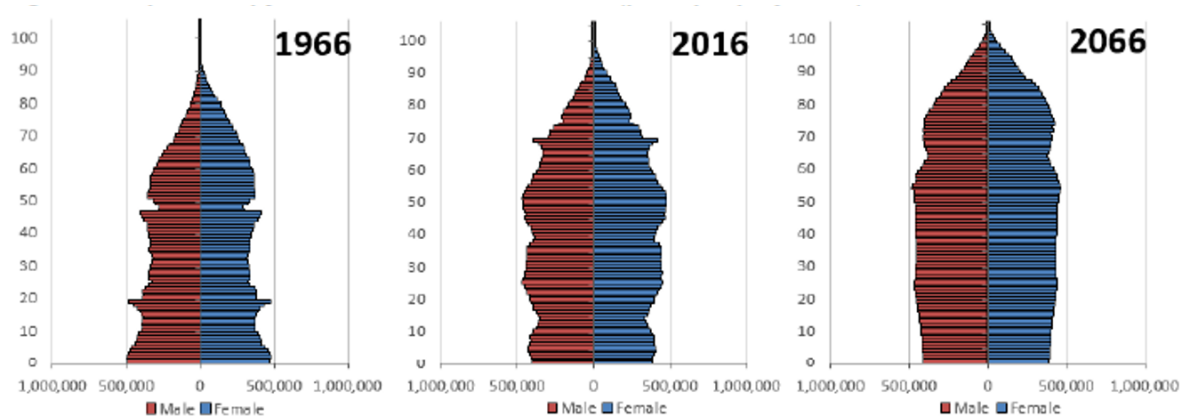
<sup>4</sup> Best and Porteus (2012) Housing our Ageing Population: Plan for Implementation (HAPPI 2)

success and desirability of Extra Care and Retirement Housing, however, is not likely to be determined by their efficacy as models of provision, but will depend upon the opinions of older people themselves and hence it is appropriate to consider how these views should be ascertained and interpreted.

## 1B.2 An Ageing Demographic

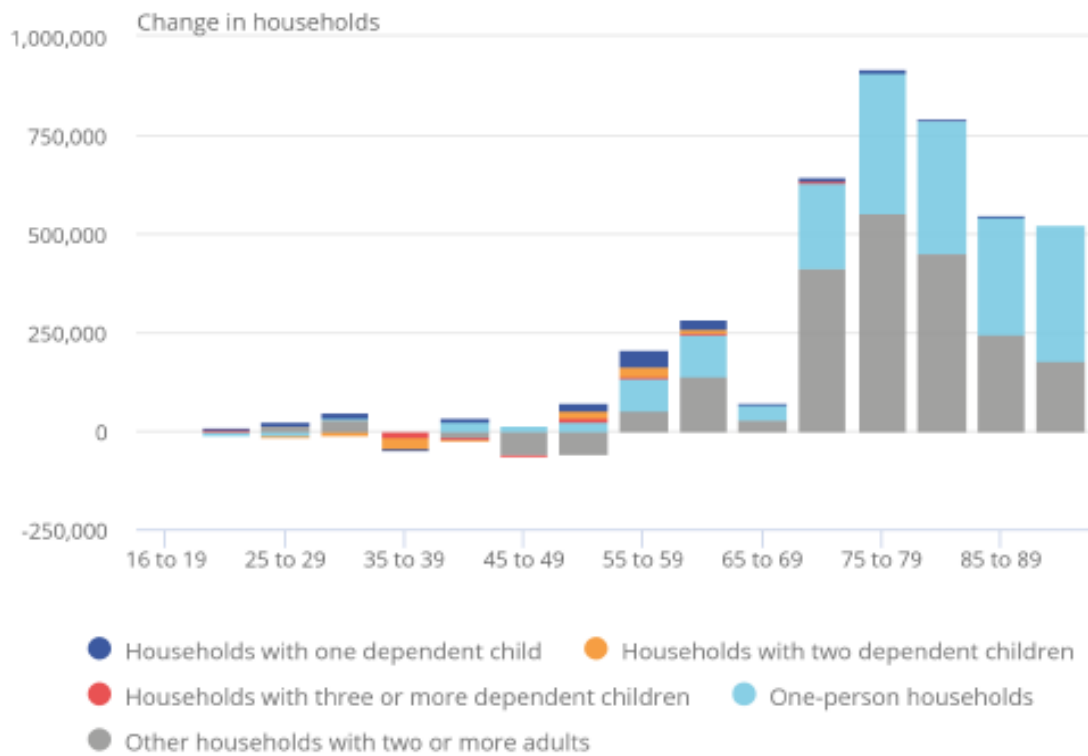
It is evident from past shifts and future projections that the population of England and the United Kingdom has an ageing demographic profile. Between 1998 and 2008 the percentage of the population of England aged over 65 increased from 15.9% to 18.2% and by 2038 is set to reach 23.9% (Office for National Statistics, 2019). The population is at a point where there are more people aged 65 or over than aged 16 or under and Figure 1B.1 shows how the shape of the United Kingdom’s population profile has changed over the past 50 years and is predicted to continue to change over the next 50.

**Figure 1B.1: UK Population Pyramids for 1966, 2016 and Projection for 2066** (Office for National Statistics, 2017)

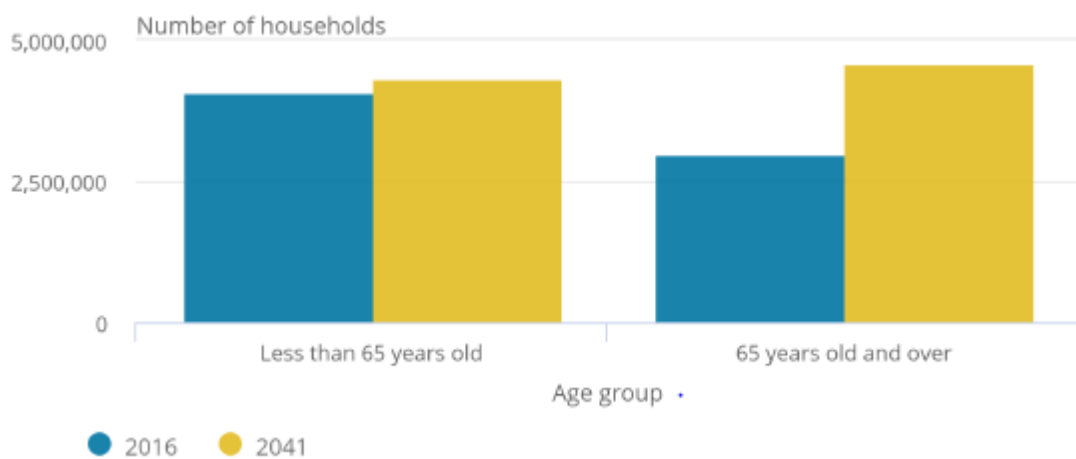


As the population ages more households are being formed by older people. Figure 1B.2 shows that most of the new households expected to be formed in England between 2016 and 2041 will be headed by an older person and Figure 1B.3 shows how the growth of one person households in England headed by a person aged 65 or over is also projected to increase relative to those under 65 over the same period. Of particular significance are the projections for growth in the numbers of ‘older old’ households, as they typically experience higher degrees of frailty and are most in need of support. Figure 1B.4 shows the anticipated increase in households headed by a person aged 90 or over.

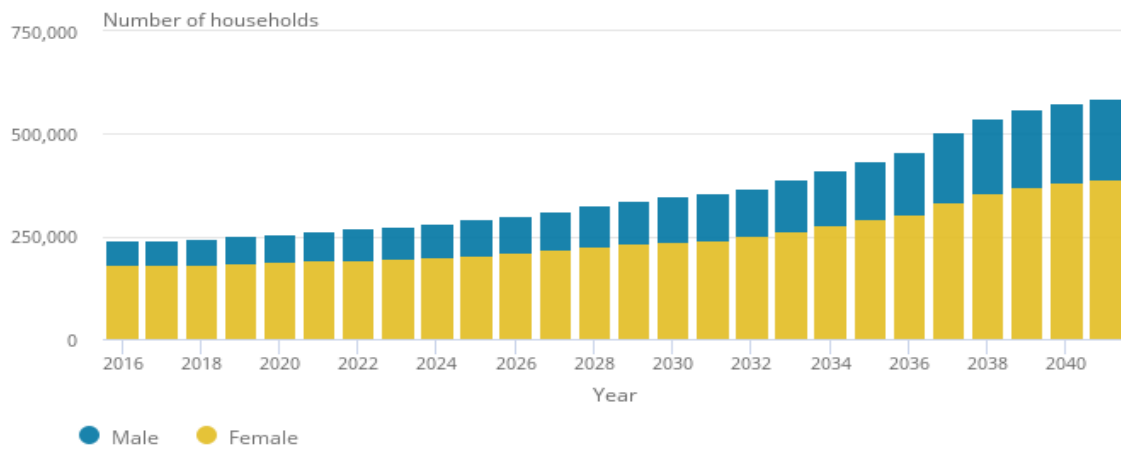
**Figure 1B.2: Projected Change in Number of Households by Type and Age of Head of Household in England from 2016 to 2041 (Office for National Statistics, 2018b)**



**Figure 1B.3: Projected Number of One-Person Households by Age in England for 2016 and 2044 (Office for National Statistics, 2018b)**

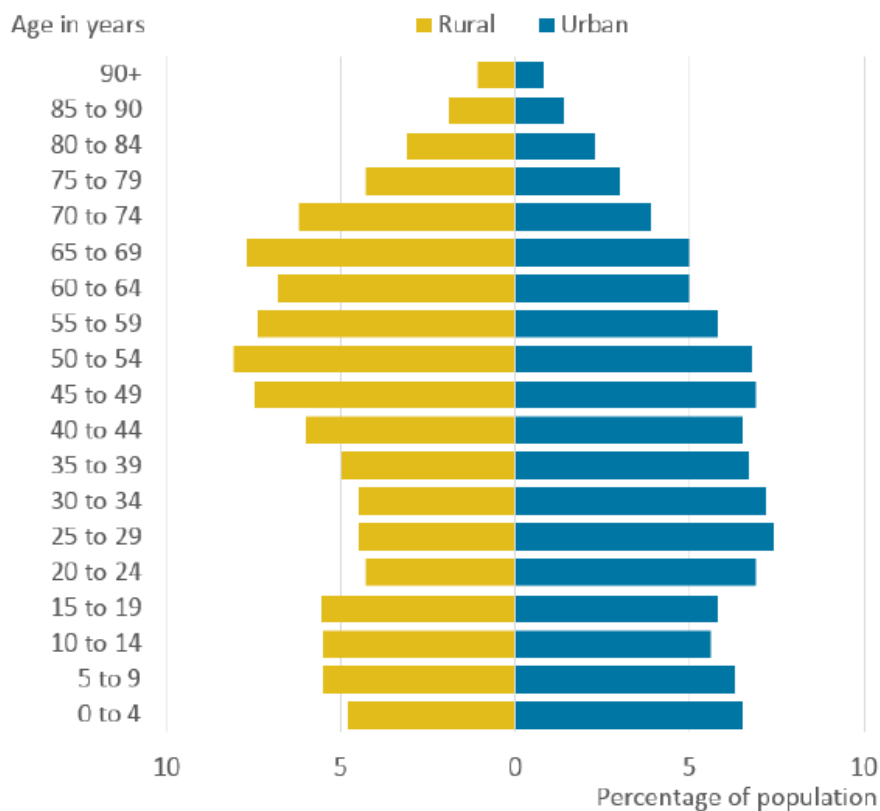


**Figure 1B.4: Projected Numbers of One-Person Households Headed by a Person Aged 90 or Over in England from 2016 to 2041** (Office for National Statistics, 2018b)

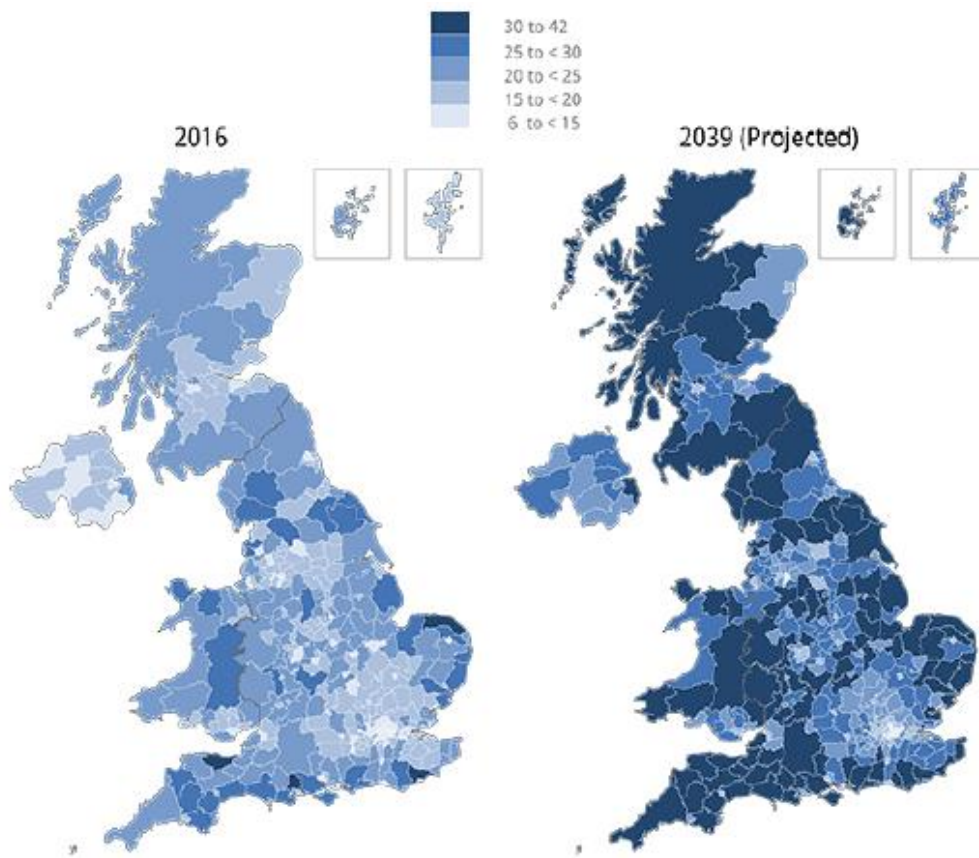


Although the whole country is ageing, not all parts of the United Kingdom are ageing at the same rate. As Figure 1B.5 shows there is a higher proportion of older people in rural than urban areas and Figure 1B.6 indicates the anticipated increase and changes in the patterns and density of older populations across the United Kingdom from 2016 to 2039.

**Figure 1B.5: Percentage of English Population in Rural and Urban Areas by Age Bands** (Department for Environment Food and Rural Affairs, 2018)



**Figure 1B.6: Percentage of UK Population Aged 65 or Over in 2016 and 2039 (projected)**  
 (Office for National Statistics, 2018a)



### 1B.3 The Importance of Housing

Baroness Andrews, in the foreword to the 2008 National Strategy for Housing in an Ageing Society (Department for Communities and Local Government, 2008), commented that “while the demography of ageing in our society may be well documented, the transformational scale of the change is less understood” (p9) and considered that “good housing would be critical in order to manage the mounting pressures of care and support expenditure” (p13). The Local Government Association (2017) predicts that between 2008 and 2039, 74% of household growth will be made up of households with someone aged 65 or older, thus making older people key stakeholders in the consideration and determination of the nature and need for future housing provision. Airey (2018) also emphasised the importance, as the population ages and changes, of ensuring there is suitable and sufficient housing to meet the demands of older people.

It is widely considered that housing and the nature of a person’s home assumes a greater significance and plays a bigger part in defining their identity and shaping their lives as they get older (Heywood et al, 2002). The Audit Commission (1998, p3) found that despite an

acknowledgement that housing provides “a stable base for independent living and affords access to other services” it had not received the same degree of attention and consideration as health and social care. The British Medical Association (2003) also recognise that there is a link between poor housing and ill health and that providing the right form of housing and living environment can play an important part in helping people to live well in older age. But the concern should not just be about ensuring that there will be sufficient numbers of properties for older people, it is also necessary to consider the nature, context and characteristics of the housing that is provided for older people, since as Airey (2018, p30) points out, “a deeper understanding is also needed of what older people want and like in their homes”.

## 1B.4 The Significance of Specialist Housing

The vast majority of older people do not live in Extra Care or Retirement Housing properties. Estimates for the proportion of older people who live in age specific specialist housing vary but is generally thought to be around 5% (Pannell and Blood, 2012). The English Housing Survey (Department for Communities and Local Government, 2016, Annex Table 2.6) estimated that in 2014, some 4% of households with the oldest person aged over 55 lived in sheltered housing, but as Table 1B.1 shows this percentage varies from under 2% for those aged 55-64 to almost 9% of those aged 85 years or over.

**Table 1B.1: Sheltered Housing Occupation by Age of Oldest Person in Household in England (2014)** (DCLG, 2016, Annex Table 2.6)

Age of Oldest Person	Sheltered Housing		Other Housing		All Households	
	No. ('000)	%	No. ('000)	%	No. ('000)	%
55-64	56	1.5	3,686	98.5	3,742	100
65-74	113	3.3	3,316	96.7	3,429	100
75-84	160	6.5	2,312	93.5	2,472	100
85 or over	88	8.8	907	91.2	995	100
<b>ALL</b>	<b>417</b>	<b>3.9</b>	<b>10,222</b>	<b>96.1</b>	<b>10,639</b>	<b>100</b>

Part of the difficulty in measuring and assessing the level of provision of specialist housing for older people is in defining what it is and who it is for. The term ‘sheltered housing’, although considered historic and unsuitable by many residents and providers, is still widely used as an umbrella term to refer generically to a broad spectrum of specialist housing provision for older people, while an array of alternative terms and descriptions are deployed by different providers to describe what are essentially the same services. The patterns of provision and the challenges of assigning definitions to a panoply of specialist housing and support for older people are



considered further in Chapter 2, but in this thesis a distinction is drawn between Retirement Housing (with support but no care) and Extra Care (with on-site care, catering and enhanced communal facilities).

In 2015 the Elderly Accommodation Counsel indicated there were around 515,000 homes specifically aimed at older people in England (Elderly Accommodation Counsel, 2015) of which some 455,000 were designated as Retirement Housing and 60,000 as Extra Care (including Retirement/Care Village developments). The prevalence and penetration of specialist housing for older people generally, and of Extra Care (or equivalent models of housing with care) in particular, are reported to be much greater in countries such as USA, Australia and New Zealand than in the United Kingdom (e.g. Sutherland and Tarbatt, 2016; Airey, 2018). Whilst it may be of interest to see how specialist housing is provided for older people in other parts of the world, the differences in their political, physical, social and economic conditions and circumstances as well as in their climate means that, what happens in one country will not necessarily translate to another, so caution is needed in making any international comparisons. Yet this has been interpreted as an indication that the United Kingdom has an under-supply of housing specifically for older people (Local Government Association, 2017) and it is claimed that demand for specialist Extra Care and Retirement Housing provision is advancing in excess of supply by some 15,000 to 25,000 units per annum (Communities and Local Government Committee, 2018).

Wanless (2006) suggested that 27% of older people would consider living in retirement housing if suitable options were available, while Hughes (2012) reported the results of a YouGov poll that had found that 33% of people over 55 were interested in the idea of retirement properties. Wittenberg et al (2006) predicted that demographic and attitude changes would also produce a substantial increase in demand from older people for specialist supported housing in preference to being cared for in an institutional setting, and Bebbington et al (2001) had forecast that, without more specialist housing, one in four older people could end up in a care home and thereby produce dramatic increases in social care expenditure. Although Wood (2013) also considered there was a huge potential demand for suitable specialist and supported housing for older people, she cautioned that, notwithstanding the assessed under-supply of this type of accommodation and service provision, the reality would also be dependent upon a range of practical, personal and emotional considerations.

Advocates for specialist housing for older people suggest that “sheltered housing schemes represent an attractive option for those seeking to maintain their independence as they grow old” (Swan, 2010, p9). Wood and Salter (2016) considered that older people living in age specific housing were less likely to feel lonely, while Dutch researchers (Van Bilsen et al, 2008) claimed that this type of accommodation provided residents with greater autonomy, sense of security

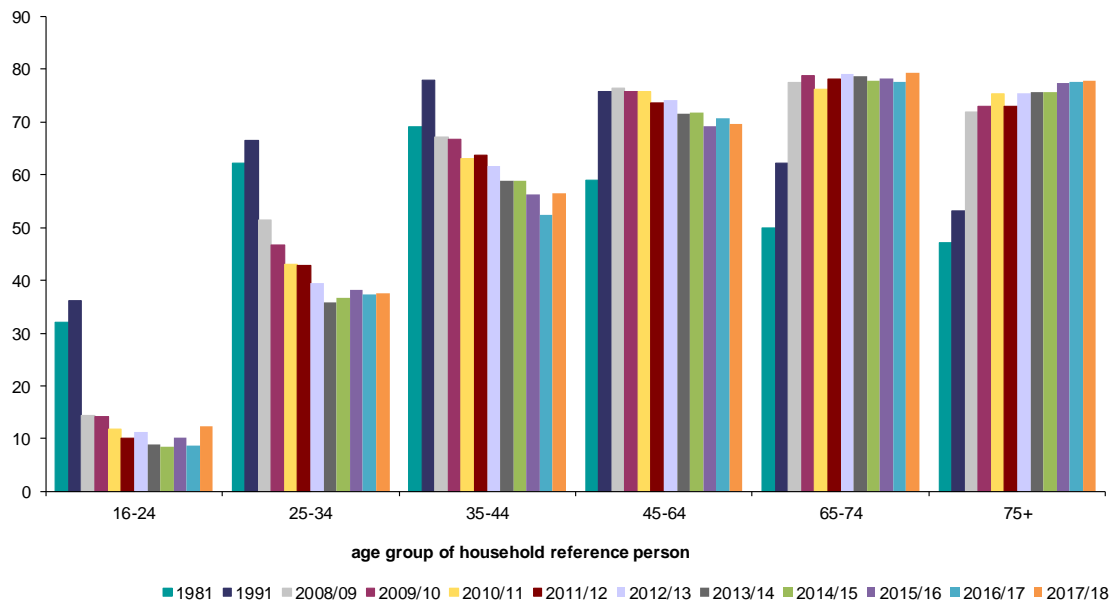
and quality of life than living in general housing in the community. It is also claimed that, as well as enhancing the well-being of residents, Extra Care and Retirement Housing produces significant savings in social care and health costs (Holland, 2015; Berrington, 2017), but it has been hard to quantify or substantiate whether this is actually the case. There are others though who have actively challenged and opposed the continued provision of specialist housing for older people suggesting it is inherently ageist, divisive and paternalistic in nature. The array of alternative opinions and perspectives that have been articulated with regard to specialist housing for older people will be considered further in Chapter 2. It does appear though that there is a justification and need to seek a better understanding of what it is that residents like and don't like about Extra Care and Retirement Housing in order to ensure best use is made of the existing provision and guide decisions regarding the potential future development of specialist housing for older people.

## **1B.5 Focus on Affordable**

Over 70% of older people are home owners. However, perceptions that the entire baby boomer generation are affluent and were all able to buy their own homes are based on misleading generalisations (Sinclair, 2015). There is considerably more diversity and inequality within the 'baby boomer' generation (i.e. people born between 1946 and 1964) and the preceding 'greatest' generation (i.e. people born between 1911 and 1925) and 'silent' generation (i.e. people born between 1926 and 1945) than is often appreciated (Corlett, 2017).

However, as Figure 1B.7 shows, over recent years rates of home ownership have declined in the under 65 age groups. The reality is that amongst the 55-64 age group only 48% own their property outright so there is an increasing likelihood that more people from this age range will be entering older age as tenants of rented properties. In 2015 24% of people aged 55-64 were renting but ten years earlier the percentage had been just 18% (Department for Communities and Local Government, 2016). The potential future consequences of this were highlighted by the All Party Parliamentary Group on Housing and Care for Older People's report on Rental Housing for an Ageing Population (Best and Martin, 2019). This raised concerns regarding the affordability, lack of security and suitability of private rented housing for older people and hence it called for "a substantial increase in social housing for older people" (p31) and specialised housing provision in particular to be given an enhanced role in addressing the housing needs of older people and averting a future crisis.

**Figure 1B.7: Owner Occupation Percentage for Age Groups from 1981 to 2017** (Ministry of Housing and Local Government, 2019 Table FC2101)



The majority of specialist housing for older people is provided on a social rent or affordable tenure basis. 74% of all Retirement Housing and 78% of Extra Care in England is provided for rent (Elderly Accommodation Counsel, 2015) and virtually all of this is provided by housing associations or local authorities at social or affordable rents (Pannell et al, 2012). Although sheltered housing accounts for less than 5% of all social housing provision it still represents a substantial public investment to support the older population. Even applying a modest valuation of just £40,000 per dwelling it still has an asset value of over £19 billion (ADASS, 2011; Institute of Public Care/Oxford Brookes University, 2012). Wood (2013) and Ball et al (2011) make the case for more specialist housing to be developed for sale, but there is arguably an even greater need to provide suitable housing for those without the physical and financial security of home ownership and to ensure that the existing social and affordable rented provision of Extra Care and Retirement Housing remains suitable and effective in meeting the needs and preferences of the less affluent older people of only modest means. It is therefore appropriate for the focus of this thesis to be directed towards affordable and social rented forms of Extra Care and Retirement Housing provision.

# 1C: Research Approach, Perspectives and Intent

## 1C.1 Over or Under Researched?

Appleton (2002, p1) complained that “much of the literature dealing with the housing needs of people in later life is concerned with specialised forms of housing ... occupied by only a small proportion of older people” while “the housing circumstances, needs and aspirations of the majority of older people who live in ordinary housing ... has been little remarked upon”. Means (1987) and McGrail et al (2001) had similarly noted the tendency for research to over emphasise the prevalence of sheltered accommodation and regard it as synonymous with all housing provision for older people, notwithstanding evidence that most older people want to remain in mixed-age mainstream housing (Hughes, 2012; Oldman; 2014).

It would be hard to deny that age specific housing, in the form of Retirement Housing and more recently Extra Care, has dominated the policy discourse on the provision of housing for older people. In the 1980s the suitability of sheltered housing provision received considerable scrutiny, prompting Johnson (1985, p1) to comment that it was ‘in fashion’, while Oldman (1986, p174) thought that the ‘buzz of excitement’ about special housing for older people was deflecting attention away from the underlying issue of inadequate investment in general housing provision.

However, this research has presented contradictory and apparently irreconcilable differences of perspective about the merits of specialist housing for older people. Goldberg and Connelly (1982) reported on numerous studies that provided a positive view of sheltered housing and Wirz (1982, p100) considered sheltered housing to be ‘highly successful’ in improving housing conditions, maintaining the health of residents, providing security and reassurance and creating companionship whilst maintaining links with the wider community. Thompson and West (1984) found that up to the mid-1980s sheltered housing had a predominantly positive perception amongst professionals and policy-makers as well as with the general public and was seen as “the most appropriate means of meeting the needs of the frail elderly” (p305). But doubts were raised by Butler et al (1983) about the validity of some of the claims being made about the merits and effectiveness of sheltered housing, while others raised more fundamental concerns about the fairness and desirability of this type of provision (e.g. Middleton, 1982a; Bytheway, 1984; Wheeler, 1986).

By the year 2000 much of the attention of research had shifted away from Retirement Housing and onto Extra Care and evaluations of some of the larger Retirement/Care Village developments (e.g. Bernard et al, 2004, 2007; Callaghan, 2008; Croucher et al, 2003, 2006, 2007; Darton et al, 2008; Evans and Means, 2007; Evans and Vallely, 2007; Peace and Holland, 2001; Peace et al,

2005; Tinker et al, 2007; Vallely et al, 2006). But, despite an assumption that the achievement of health and social care benefits was a prime driver for the provision of specialised retirement accommodation (Ball and Nanda, 2013), Atkinson et al (2014) found a paucity of literature that specifically evaluated the effectiveness of these aspects of housing with care provision for older people. Much of the focus of research has been on the design and physical character of the buildings and the social interactions that occurred within them, but determination of whether they were a 'success' remained largely anecdotal and dependent upon the value judgements of the assessor (Bartlett and Peel, 2005, p104).

Thus, despite the privileged position that specialised housing for older people has had in terms of research attention, there is still no clear consensus about what exactly it is or who should be living in it (Clapham and Munro, 1990; Croucher et al, 2006; Tinker et al, 2007). The National Strategy for Housing in an Ageing Society (Department for Communities and Local Government, 2008, p142) had acknowledged evaluations of the outcomes achieved by specialised housing were "small in number" and not robust. Taylor and Neill (2009, p18) similarly considered that, notwithstanding high levels of reported satisfaction, "there is relatively little research on what sheltered housing schemes provide and what makes them work well".

It is therefore suggested that research is still needed to understand and appreciate, what Satsangi and Kearns (1992, p329) referred to as, the 'composites of experience' of specialised Extra Care and Retirement Housing that looks beyond simplistic assessments of contentment.

## **1C.2 If Professionals Know Best, Residents Know Better**

Whilst it might be supposed that the primary purpose of Extra Care and Retirement Housing should be to serve the needs and desires of the older people who live in these settings, the benefits and merits of this type of provision are frequently expressed in terms of policy aims and objectives, such as achieving savings in health and social care budgets or freeing up under-occupied housing. Young and Lemos (1997) said the insistence on allocating funding and access to specialist housing based on criteria set by professionals led to the establishment of dysfunctional and unsustainable communities. The themes used by Croucher et al (2006) in their literature review of housing with care for older people of: 'promoting independence'; 'health, well-being and quality of life'; 'social integration'; 'home for life'; 'an alternative to residential care'; 'cost effectiveness'; and 'affordability' appear to reflect the policy constructs and criteria of professionals and providers rather than residents' demands and desires. Although the National Strategy for Housing and Ageing Society (Department for Communities and Local Government, 2008, p133) proposed that specialised housing "should be considered from the

perspective of older people, in terms of the quality of housing, location, services and lifestyle it offers” there is little evidence of changes having occurred to give effect to this.

Riseborough (1996) found that the views of tenants were even missing from studies that sought to assess the quality and appropriateness of the services that sheltered housing provided. Gabriel and Bowling (2004) suggested there was a need to do more to increase understanding of the preferences and perspectives of older people themselves about the places where they live. For Neuberger (2008) the greatest concern was not that providers were making mistakes by misinterpreting what older people want, but that many simply had not thought it was sufficiently important for them to find out. Velzke and Baumann (2017) found that older people, and especially those with care needs, were often not listened to or assumed to lack the capacity to give a considered view.

Tinker (1983) noted that many of the assessments and guides to the development of sheltered housing were focused on the physical construction and characteristics of the properties and this appears to still be the case in respect of Extra Care housing (e.g. Robson et al, 1997; Fischer et al, 2012). There is, however, a growing recognition that the places people call ‘home’ also need to be ‘pleasurable’, ‘manageable’ and ‘social’ (Park et al, 2016), and suggestions that the social dynamics of a community or an individual’s psychological character could potentially play an even greater part in determining their sense of contentment than the physical features of a building or place (Callahan, 1993). But, because a person’s views and attitudes about their home are likely to involve a combination of physical, social and personal considerations (Sixsmith, 1986), they may require more than a simple assessment of satisfaction to be properly appreciated. Foord et al (2004) demonstrated that when considering the satisfaction of residents of sheltered housing ‘not everything that can be counted counts and not everything that counts can be counted’ and thus made the case for exploring alternative methods of gathering feedback and seeking to understand the purpose and priorities for Retirement Housing and Extra Care from a residents’ perspective.

It is only by being able to capture, connect and prioritise the subjective views, motivations and preferences of the people who live in Extra Care and Retirement Housing settings will it be possible to appreciate the complexity and interconnectedness of their attitudes and opinions with regard to the priorities of policies and realities of existing forms of provision.

### **1C.3 Complex, Dynamic and Contingent**

There is a recognition that decisions about where to live in later life are highly complex and hold great significance for older adults and that the factors that influence where people live as well as being underpinned by a mix of hopes and expectations are also contingent upon a myriad of other factors that are prone to change over time (Clough et al, 2004). The housing preferences of older people are likely to be shaped by a combination of physical, social and emotional influences (Oswald and Wahl, 2004). After considering contradictory and ambiguous reports of the quality of life experienced by older people living in sheltered housing, Beaumont and Kenealy (2004) concluded that these were complex and multidimensional constructs dependent upon psychological and social as well as physical considerations.

Menec et al (2011) emphasised the importance of studies needing to adopt a holistic and dynamic perspective, and Biggs and Tinker (2007) saw a holistic approach as being essential in order to avoid each aspect or influence on the decisions of older people being seen in isolation without understanding their inter-relationships with other considerations. Oswald et al (2007) also recognised that a holistic perspective needed to be 'negotiated', in order to take account of the multiplicity of people's preferences, and could not simply be imposed or prescribed.

It is generally accepted that it is meaningless to consider 'age' as conferring a single social identity or to regard all older people as having shared concerns or interests, yet the overwhelming concern of empirical studies appears to be about identifying consistent causal relationships (Gilleard and Higgs, 2010). Even in ambitious studies that have sought to define and measure the multi-faceted and inherently personal views of older people (e.g. Valchantoni, et al, 2016), the focus has still been on analysing the various influences as independent variables, disconnected from the interdependencies of each individual's experiences and perspectives. Older people also appear to be particularly adept and willing to adapt to the circumstances of their living conditions and often profess to have high levels of housing contentment (Rowles et al, 2004) and hence it is necessary to look beyond mere rankings or scores of satisfaction in order to test the relative importance of different features and factors.

Franklin (2006) noted the need to resist the temptation to collapse geographical, cultural, social and individual variables into a simple fixed or unified view. Rather than seek to combine, resolve and unify separate strands and colours of opinion into a single proposition, it is necessary to embrace the detail of different views in order to expose and appreciate the complexity that this creates. My aim is to find a way of make sense of the plurality of perspectives that residents of Extra Care and Retirement Housing have about their living environments without homogenising

these into a definitive formula and thereby risk losing the strands and colours of perspective to the 'Plasticine Effect' (Coombes, 2005).

**Figure 1C.1: The Plasticine Effect**



*Data may start out bright and colourful, but if you simply mix it together, as with Plasticine, all you end up with is an unappealing lump. (Coombes, 2005)*

As times change so inevitably will the aspirations and expectations of older people. The views that older people have about living in specialist housing are thus likely to be dynamic and fluid rather than remaining static and fixed. Attitudes and opinions will shift and be influenced by policy (macro) political, cultural and economic factors, the changing physical (meso) context and features of the service provided and the personal (micro) influences of changing preferences and priorities. Phillipson et al (1999) noted that, in a longitudinal study of housing preferences, it was likely that not only would attitudes and expectations change over time, but the questions being asked might also need to be adapted to avoid becoming outmoded or irrelevant due to changing circumstances. Levenson et al (2005) also highlighted the difficulties of expecting people in their middle age years to be able to anticipate in advance what they will want and the choices, priorities they may make in later life.

Although some changes occur in a manner that is dramatic and obvious, many shifts of position or perception are more subtle and incremental so may not always be immediately apparent. As with the fable of a frog that can be slowly boiled alive because it is unable to sense the danger as the temperature of the water gradually increases, Bernard (2008) warned there is also a risk that attitudes towards specialised housing might be similarly imperceptibly shifting from a position of complete satisfaction to one of peril and being seen as outmoded and undesirable. To guard against this, it is suggested that regular 'temperature checks' are required to ascertain the attitudes of residents and others about this form of provision.

Critical gerontology, as advocated by Phillipson and Walker (1987), calls for a commitment to understand the social constructions of older people and involve them in the process of conducting research that goes "above and beyond the platitudinous claims about simply needing to 'hear the voice' of older people" (p7). Phillipson (1998) also implored researchers to seek new insights and explanations free from the inherent bias and limitations of their own perspectives and



tendencies towards social control. However, Holstein and Minkler (2007) also recognised that the process of seeking understanding may also require a degree of methodological risk taking and epistemological radicalism.

#### **1C.4 An Abductive Approach**

As indicated, this is not intended to be a prescriptive or normative thesis that sets out to prove or disprove a particular hypothesis. Instead, my aim is to provide an appreciation and insight into the personal positions and perspectives of residents who live in and have first-hand experience of Extra Care or Retirement Housing, in order to establish a basis for explaining and understanding what matters to them and why. To do this I have adopted an exploratory abductive approach to navigate, what Tavory and Timmermans (2014, p1) referred to as, the “treacherous waters” between purely descriptive accounts that lack theoretical foundations and the equally problematic tendency to filter findings to confirm preconceived beliefs.

The process of abduction was developed and championed by Charles Peirce (1931/1958) as a means of studying facts and devising a theory to explain them and provides a distinct alternative to both deductive and inductive research strategies. Deduction starts with a theory or rule and looks for evidence to test whether it can be proved or disproved in particular settings. Because deductive evidence is scrutinised according a set of a priori assumptions, there is a risk that this will exclude consideration of extraneous influences or circumstances (Blaikie, 2010, p85). By contrast, inductive research seeks to gather evidence in order to test and either strengthen or problematize an established position or perspective (Blaikie, 2010, p83). Glaser and Strauss (1965), however, recognised that there is an inherent danger with inductive research that only what is being looked for will be found. Although both deduction and induction are important modes of research, they are not ‘ampliative’ (Will, 1988). Blaikie (2010, p89) characterises abduction as seeking to generate new insights by detaching observations from existing theories so inviting speculation not only about ‘what’ the data could be demonstrating but also prompting insights into ‘why’ the results appear as they do.

Abductive research seeks to construct theories that interpret and give meaning to the motives and intentions which direct the behaviours of people in their everyday lives. It involves a combination of logical inference with creative insight and hence there are two stages to the abductive process.

The first step is to capture the accounts that people give of their views and experiences in order to reveal the concepts, assumptions and judgements that are often taken for granted so not normally seen. The intention is to see the social world as perceived and experienced from the

inside by the participants rather than having an outside view imposed upon it. Giddens (1976; 1979) suggests that research cannot expect to describe or explain a setting or situation without appreciating how it is negotiated and evaluated by the participants who live within it.

The second step uses these accounts as the clues and inspiration to help synthesize and propose new theoretical possibilities (Blaikie, 2010; Tavory and Timmermans, 2014). Abduction involves an examination of the potential influences and means by which different conceptions were developed and arrived at (Heider, 1988), in order to suggest a 'best explanation' (Harman, 1965) or a 'plausible framework' (Weiss, 1968) to fit them. It is essential that in developing theories and proposing concepts that this is done 'bottom up' from the accounts of participants rather than imposed 'top down' to fit with some prior point of view (Blaikie, 2010, p91).

Abduction is said to be typical of the sort of 'backwards reasoning' employed by Sherlock Holmes, whose detective genius lay in close observation of apparently ordinary points of detail and then developing hypotheses to explain what events or circumstances might have led up to the situation in question (Fann, 1970; Sebeok and Umiker-Sebeok, 1983; Shank, 2001). Theory developed by abduction is also interpretive so it is possible to consider the interaction of multiple scenarios and possibilities, rather than being limited to seeking to establish the validity of a single set perspective.

Einstein (Einstein and Infeld, 1938, p29) recognised that "to raise new questions, new possibilities and to regard old problems from a new angle requires creative imagination" and could be more significant than finding a solution. Beveridge (1957) also argued that ideas did not need to be logically derived in order to be worthy of investigation, hence it should not be a concern that abduction depends upon conjecture and speculation in order to produce its explanatory propositions.

Because abduction is 'theory generative' rather than 'theoretically evaluative', it is accepted that the inferences and assessments made will inevitably be logically weaker than those developed by deduction or induction. However, it is suggested that this limitation is more than outweighed by its potential to offer new theoretical insights and explanations as an alternative to the confirmation of current theoretical positions that will be considered in Chapter 3.

## **1C.5 Q Methodology**

Q methodology, when used as a method of social constructionism, is "capable of identifying the currently predominant social viewpoints and knowledge structures relative to a chosen subject matter" (Watts and Stenner, 2012, p42). When embarking on this research process I did so with a view that Q methodology could provide the means to achieve my aim of undertaking an

exploratory and abductive study that embraced the complex, contingent and varied conceptions held by residents of Extra Care and Retirement Housing. This is because Q methodology provides a mechanism that encourages reflection, articulation and capture of the accounts and positions of participants without distorting or contaminating them with the researcher's own bias and constructions. Collecting and reporting on the attitudes and perceptions of older people living in specialist housing settings is of value in itself, but because Q methodology also provides the means for the systematic analysis and interpretation of those accounts it also offers the potential for the identification of patterns, theories or concepts that may help to explain them. Details of how Q methodology fits with and integrates the aims, context and theoretical framework set out in Chapters 1, 2 and 3 will be considered further in Chapter 4.

This will not be the first study involving older people to use Q methodology, so the original contribution of this thesis is not solely based on its use of Q methodology, but on the understanding and insights that Q methodology can bring about. However, because Q methodology is still not widely known about or understood, there is nevertheless merit in demonstrating the distinctive ways in which it can be deployed, configured and analysed to expose the perspectives of older people living in Extra Care and Retirement Housing. Wolf et al (2011, p53) saw virtue in any and all studies that sought to enhance or advance an appreciation of the value of Q methodology. But Q methodology is not "a quick and easy trick" (van Exel and de Graaf, 2005, p17) and hence Chapter 5 will set out the steps and stages involved in undertaking the Q study as well as emphasising the ontological commitment inherent in its formulation and the need for statistical integrity in its interpretation. The patterns, differences and commonalities in the priorities and preferences of residents of Extra Care and Retirement Housing that are exposed by the Q studies are identified and interpreted in Chapters 6, 7 and 8.

## **1D: Synopsis of Thesis Structure and Approach**

### **1D.1 Contents and Contributions**

This section provides a guide and overview of the structure of the thesis and an indication of what each chapter will cover and its contribution to the overall thesis. The thesis has three parts. The first three chapters set out the scope, context and aims of the thesis which are considered and summarised in a short fourth chapter that provides a precis of its promise and the potential. The fifth chapter outlines the steps and stages of the Q studies undertaken and sixth, seventh and

eighth chapters set out the results. The final two chapters consider the meaning, theoretical potential, contribution and consequences that arise from the study.

### **Chapter 1 – Intent, Interest and Investigation**

This introductory chapter makes the case for a study of residents' attitudes and preferences for specialist socially rented and affordable Extra Care and Retirement Housing. It explains that, because of a lack of clarity or consistent understanding about the purpose that these forms of specialist housing play in the spectrum of provision for older people, there is a need for research to try to find a theoretical perspective that can provide the context and basis for its evaluation. It also demonstrates why this is a worthwhile endeavour, because, even though the majority of older people do not live in this form of accommodation, Extra Care and Retirement Housing do still represent a significant resource and opportunity to meet growing needs and changing expectations. It sets out my aims, intentions, motivations and basis for undertaking this study and the underlying assumptions that have influenced the choices that were made about the methodology and approach with which it was undertaken.

### **Chapter 2 – Development, Definitions and Dispositions**

This chapter provides the context for the study by considering the evolution, challenges and circumstances that have produced the current patterns of provision of Extra Care and Retirement Housing. It considers the spectrum of services and problems of definition before considering the range of attitudes and perspectives that have been taken with regard to the nature and potential of past, current and future provision that set the scene for the research within this thesis.

### **Chapter 3 – Theoretical, Critical and Holistic Perspectives**

This chapter makes the case for establishing theories in the realms of housing and ageing and considers the issues that may have influenced or impeded the development of theory in these domains. It considers the different theories and perspectives that have been proposed in respect of housing and gerontology as well as the assumptions and attitudes inherent within them. This demonstrates the need for a more critical frame of reference in order to challenge the traditional narratives of decline and dependence amongst older people. It proposes the adoption of a holistic perspective that emphasises the need to search for a contingent and multi-dimensional approach that seeks to incorporate micro, macro and meso perspectives.

### **Chapter 4 – Precis of the Promise and Potential**

This chapter considers the need for a new and methodologically innovative approach with which to respond to the challenges identified in the first three chapters. It describes the origins and

applications of Q methodology and uses the metaphor of the blind people and the elephant to describe its distinctive epistemological characteristics. Previous applications of Q methodology to study housing and care settings are also critically assessed and distinguished from the scope and purpose with which it is applied in this study.

### **Chapter 5 – The Elements of a Q Methodological Investigation**

This chapter outlines the elements and stages of a Q study and demonstrates how each of these component elements was scoped and established. This starts with the formation of a concourse drawn from the views of residents of Extra Care and Retirement Housing that is distilled into a representative 'Q Set' of statements. It explains how the 'P Set' of participants that form the variables of the study were selected from 5 Extra Care and 11 Retirement Housing sites and the process, practicalities and ethics for gathering data in the form of 'Q Sorts'. Even though the analysis of the data is undertaken with the aid of a simple computer programme it examines the judgements that were needed to determine the basis on which the results should be analysed and seeks to justify how these decisions were made.

### **Chapter 6 – Micro Findings and Personal Perspectives**

This chapter sets out the results from the factor analysis of the Q sorts provided by 68 Extra Care residents and 157 Retirement Housing residents on a combined basis to identify the distinct sets of preference within each group. It also considers the results obtained by undertaking factor analysis on a site by site basis for the 5 Extra Care sites and 11 Retirement Housing sites and looks at the correlations between the perspectives identified. In addition the results are analysed to identify the best fit single common view with the suggestion that this might serve as a basis for making potential comparisons with other categories of participant.

### **Chapter 7 – Meso Findings and Provision Comparisons**

This chapter makes comparisons of the perspectives identified within and between the Extra Care and Retirement Housing sites to identify the issues of contention and the distinctiveness of each setting and seeks to understand the nature of the relationships between site characteristics and participant perspectives.

### **Chapter 8 – Macro Findings and Population Priorities**

This chapter provides the results of a 'second order' analysis based on analysis of the initial sets of perspectives identified for Extra Care and Retirement Housing in order to identify underlying distinctions within these populations of participants. It also assesses the extent of the influence of the demographic profile of participants on their positions and perspectives.

## **Chapter 9 – Identifying Insights into the Preferences, Positions and Priorities of Residents of Extra Care and Retirement Housing**

This chapter assesses the scope of the studies undertaken and insights that they provide into patterns of preference as well as supporting an understanding of the significance of place based provision and possible policy implications.

## **Chapter 10 – Theorising Micro Preferences, Meso Positions and Macro Priorities**

This chapter isn't seeking to give answers or reach a definitive conclusion, but does seek to use the insights and understanding of the research to suggest a theoretical framework based on the process of abduction. The model proposed recognises the dynamic inter-dependence of micro, meso and macro considerations and speculates about how their interaction may be influencing the conceptions and scope for future development of Extra Care and Retirement Housing provision.

## **Chapter 11 – Contribution, Consequences and Critique**

This concluding chapter considers the credibility of the contribution made in terms of: 'what' new knowledge and insights the research has provided; 'how' it was provided by deploying Q methodology; and the understanding of 'why' that comes from the theoretical model proposed. It assesses the implications and consequences of the research for policy, provision and practice and ends with a critique of Q methodology, its mode of application and a reflection on the journey undertaken.

### ***Chapter 1 Contribution***

*This chapter has made the case for seeking new ways to appreciate and understand the purpose, provision and priorities of Extra Care and Retirement Housing, in order to find a way to resolve the apparent contradictions and lack of clarity about the merits of these forms of specialised housing for older people. It has called for this to be done holistically and with consideration of the range and variety of potential preferences of residents rather than homogenising them into a single idealised solution. There has also been a recognition of the need for the views being studied to have been derived on a 'bottom up' basis, in order to capture the essence of the subjective perspectives of the older people living in these forms of specialised housing, rather than being imposed 'top down' by professionals or providers.*

## Chapter 2

### Development, Definitions and Dispositions

*The intent of this chapter is to set the context for the thesis. To do this it starts by considering the origins and evolution of specialist housing for older people as well as the circumstances and influences that have led to the current position and patterns of provision. It also seeks to position, identify and define Retirement Housing and Extra Care within the array of different modes and forms of housing, care and support for older people. It then concludes with a review of some of the competing evidence, attitudes, opinions and expectations about the provision and potential of specialist housing for older people.*

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## **2A: The Evolution of Specialist Housing for Older People**

### **2A.1 Origins and Evolution of Retirement Housing and Extra Care**

The origins of specialist housing for older people have been traced back to medieval hospitals and the almshouses established by wealthy benefactors. Despite their often elegantly designed exteriors, these offered only very basic and sparse facilities for the elderly and infirm who were deemed deserving of support (Fisk, 1999; Howson, 1993). Amidst the industrial revolution of the 19<sup>th</sup> century, the Poor Law Amendment Act of 1834 initiated a major program of workhouse provision, but these institutions imposed such a harsh regime on their inhabitants that they were only ever seen as an option of last resort for the elderly in desperate need. Although the workhouse system was formally abolished in 1930 (by the Local Government Act 1929), many continued as Public Assistance Institutions and it was not until after the Second World War that the National Assistance Act 1948 finally removed the last vestiges of poor law provision. It has, however, been suggested that the legacy of almshouses and the workhouse still resonate in the architectural assumptions and designs of modern day specialist housing and care environments for older people (Hanson, 2002, p167; Torrington, 2002, p186).

The assumption of responsibility for the provision of social housing by local authorities, as well as some notable philanthropists, at the end of the nineteenth century and its expansion in the early twentieth century, contributed to significant improvements in the availability of good quality affordable housing (University of West of England, 2008). However, during the Second World War, more than half a million homes were destroyed and post-war Britain faced a major housing crisis. To address this pre-fabricated houses were constructed to help fill the gap (Grindrod, 2014) and there was a substantial increase in local authority housing provision, with the percentage of people living in social rented housing increasing from under 10% in 1939 to 23% by 1961 (Ministry of Housing Communities and Local Government, 2019).

As well as the many families in need of housing, it also became evident that there were significant numbers of older people who also needed better accommodation, but who did not necessarily require family sized properties. This set the context for the development of smaller flats and bungalows specifically for older tenants to move to and the genesis for the concept of 'sheltered housing' (Morton, 2015). It is evident that sheltered housing was thus conceived as a response to a housing need in order to give older people a decent and secure home that would enable them to live comfortably independently and so was of a different genus from the workhouses and hospitals whose origins were more closely aligned with the role of modern day residential care and nursing homes (Peace et al, 1997).

The drive and priority to develop specialist social housing for older people took hold in the 1960s and continued to expand through the 1970s and into the 1980s. There appeared to be an emerging view that 'sheltered housing' was a panacea that not only met housing needs but could also address many of the other needs, demands and desires of an ageing population (Thompson and West, 1984) and so avoid the necessity for people to live in residential care (Townsend, 1962). Smith-Bowers (2004) thus noted that the rapid increase in sheltered housing provision in the 1960s into the 1970s had been accompanied by a shift of emphasis from this being seen as a 'general' to a 'special' form of housing provision.

In 1977, Jefferys (1977, p12) expressed the view that "the single greatest housing need is for more purpose-built sheltered accommodation, where the elderly alone or in couples can continue to look after themselves in comfortable, functionally appropriate surroundings, secure in the knowledge that if they fall sick or have an accident someone will come quickly to their rescue". In fact, the belief that sheltered housing represented the ideal solution to address the housing and support needs of older people, became so ubiquitous and entrenched that Wheeler (1986) complained that it remained virtually unquestioned despite evidence and studies that had since the early 1970s started to raise doubts about the role, purpose and merits of sheltered housing (e.g. Page and Muir, 1971; Boldly et al, 1973; Gray, 1976). The government did acknowledge that there might be a need "to widen the range of housing for older people" (Department for the Environment, 1976). However, it was the comprehensive study undertaken by a team of researchers at the University of Leeds (Butler et al, 1979; Butler et al, 1983) that perhaps played the most significant role in raising concerns about the efficacy and occupancy of sheltered housing. This found that many older people without a need for support or assistance were opting for sheltered housing, simply because it offered the prospect of modern and well managed place to live, and that they were not concerned that this was a relatively expensive option, as in most cases housing benefit was covering the cost. Middleton (1982a) and Bytheway (1984) also raised objections that too much emphasis and resource was being allocated only to a 'lucky few' older people who were housed in sheltered accommodation. It was, however, acknowledged that if sheltered housing was only let to frail tenants they would overwhelm the warden/manager with their care and support needs (Clapham and Munro, 1990). Despite these questions and misgivings the expansion in provision of sheltered housing continued with a 69% increase in the number of sheltered housing units between 1979 and 1989 (Peace et al, 2001).

Advice from the charity Age Concern on the housing options for older people in 1987 (Bookbinder, 1987, p22) still indicating that "demand for sheltered housing [is] very heavy and there is no sign of this changing" such that securing a move to rented sheltered housing can be very difficult or, in some areas, almost impossible. Yet, by the late 1980s, there were also signs that some older sheltered housing was, because of its lack of space or privacy, becoming 'difficult to let' (Tinker,

1989; Lupton, 1989). A study of under-occupation in local authority and housing association properties found that sheltered housing was easy to let when it was well located and up to modern standards, but “there was some sheltered housing which was unpopular because it comprised bedsit accommodation with shared facilities, had no lifts and was poorly located” (Barelli, 1992, p35). It was suggested that problems of demand had arisen because of a failure to appreciate that the aspirations and expectations of older people were rising in accordance with general advances in incomes and standards of living, with the result that older people were becoming more selective and discerning about the standards of sheltered housing they would accept (Fletcher, 1991). Despite 92% of local authorities and 79% of large housing associations having some difficulty letting sheltered housing schemes, it was thought to be over simplistic to assume that this meant there was too much of this type of accommodation (Tinker et al, 1995). Yet, even with these warnings, there still did not appear to be any particular “cooling-off of the considerable popularity” that sheltered housing seemed to enjoy (Arnold and Page, 1992, p51).

The development of sheltered housing in the 1970s and 1980s, however, pre-dated the concept of ‘Care in the Community’. Since 1981 the stated policy has been “to enable elderly people to live independent lives in their own homes wherever possible” (Department of Health and Social Security, 1981) and in the White Paper ‘Caring for People’ (Department of Health, 1989) the government sought to reduce dependence on institutional care by advocating for support to be provided to people in their own homes, rather than necessitating a move by the person to the source of the support. But in 1998 the Audit Commission concluded that, there was still no clear vision for the future of sheltered housing or evidence that it was being considered as a part of a wider strategic approach to the provision of services for older people in order to relieve pressures on social care budgets (Audit Commission, 1998).

A few local authorities, such Warwickshire County Council (Reed et al, 1980) and Hammersmith (Tunney, 1981), were quick to spot the potential benefits and social care savings that ‘very sheltered’ housing could offer in supporting frailer residents and avoiding a need to move into residential care. Several housing associations also pioneered the development of the concept of ‘Extra Care’ housing in the 1980s<sup>5</sup> including the Abbeyfield Society, Hanover Housing Association and Housing 21. But there seemed to be no consensus amongst housing associations (Anchor Housing Association, 1981) or local authorities (Association of Metropolitan Authorities, 1978) about what Extra Care housing should offer or the level of frailty that should be regarded as necessary or sufficient for eligibility to live in this form of accommodation. Butler et al, (1983) thus concluded that the debates about very sheltered housing were ‘political and

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<sup>5</sup> The term ‘Extra Care’ appears to have come from an Anchor Housing Association (1978) study on the Challenges of Caring for Frail Elderly in Sheltered Housing.

subjective' (p128) with the view taken depending upon the extent to which it was seen as fulfilling either a 'housing' or a 'social care' need (p129). Almost twenty five years later Tinker et al (2007, p34) concluded that there was still "a fog of confusion surrounding the concept" of Extra Care "and little consensus over its definition". Pannell and Blood (2012) considered that the difficulty in understanding what Extra Care is was a consequence of the co-existence of descriptions of the different levels of support and assistance residents required alongside definitions based on the physical attributes of the buildings and the services provided.

The Housing Corporation admitted that it had also initially been cautious about funding the development of very sheltered housing (Housing Corporation, 1996), but by the late 1990s there was very little 'ordinary' sheltered housing (i.e. Retirement Housing) being built for social rent and development of specialist housing for older people by housing associations was almost entirely focused on the provision of Extra Care (Galvin, 2016). As well as offering potential savings in social care budgets, Extra Care was widely seen as providing a more enabling housing and support model as well as being a considerably more appealing prospect than residential care (Fletcher et al, 1999; Oldman, 2000). Wolverhampton City Council (Bailey, 2001) was one of the first of a series of local authorities to announce an intention to entirely replace residential care homes with Extra Care schemes. Although Tinker (1989) had suggested there was evidence that Extra Care could accommodate people with dementia, Oldman (2000) felt this needed to be caveated primarily because of the potential impact that their behaviour could have on other residents. In 2009 Hanover Housing Association commissioned a review of the evolution of the concept of Extra Care over a period of 20 years to commemorate the anniversary of the opening of its first Extra Care scheme in 1989 (King, 2009). This celebrated the benefits and qualities of Extra Care with its extensive facilities and the availability of personalized care and support to maintain independence and dignity, but alongside this report Hanover Housing Association also raised questions about its cost effectiveness and future sustainability and suggested there was still a need to "reinvent retirement housing" and look for "alternatives to extra care" (Best and Moore, 2009).

This account of the evolution of specialist housing for older people provides an indication of how the current expectations, manifestations and attitudes towards Extra Care and Retirement Housing may have been influenced by changing political, economic, social and demographic circumstances. Massey (1984), in her influential insights on the 'Spatial Divisions of Labour', highlighted how place based inequalities were constructed and reconstructed over time by the cycles of economic, social and political influence. In the same way, it does not make sense to try to study or understand sheltered housing as an abstract concept isolated from the social context of the time, place and people who live in it.

## 2A.2 Changing Political, Economic, Social and Cultural Landscapes

Attitudes, expectations and opinions are not only a product of an individual's character and position, they are also a reflection of their personal history and experiences through the evolution of the political, economic and social environment. But, because change is constant and incremental, it is often only when we look back that we realise how much has changed and how distant the events and lifestyles of the past can seem today. Hartley (1953) thus described the past as being like a foreign country where they do or did things differently.

Smith-Bowers (2004) provided an assessment of how perceptions and provision of social-rented sheltered housing had shifted and changed between 1950 and 2000. By way of background and in order to provide an appreciation of how the political, economic and social context in the United Kingdom may have influenced the evolution of Retirement Housing and Extra Care over the past 60 years, five arbitrary dates set at fifteen year intervals (i.e. 1955, 1970, 1985, 2000 and 2015) have been selected to provide an indication of how the character and position of specialist housing provision for older people has altered as times have changed.<sup>6</sup>

### 1955 – A New Era

#### Economic and Political

The Labour Party had won a decisive election victory in 1945 with a promise to 'win the peace'. Although they had introduced a radical programme to tackle the five 'Giant Evils' of Want, Sickness, Squalor, Ignorance and Idleness identified in Beveridge Report (Beveridge, 1942) including the National Health Service Act 1946, the National Insurance Act 1946 and the National Assistance Act 1948, the expectations had been raised so high the overall assessment was one of "hopes deflated by failures" (Calvocoressi, 2008) and that they were ultimately judged to have failed (Seabrook, 1978). As a consequence the Conservatives came back to power in the 1951 with Winston Churchill as Prime Minister. Until April 1955 when, at the age of 80, he resigned due to ill health and was succeeded by the Foreign Secretary Antony Eden. In May 1955 a general election was held which the Conservatives won with an increased majority.

Food rationing had finally ceased in 1954, and in 1955, a decade after the end of the Second World War, and there were some tentative signs of recovery. But it was clear that the War had taken its toll on the United Kingdom as it struggled to reconstruct and find a role in a new world order where the United States was dominant and Britain was losing what remained of its Empire.

<sup>6</sup> References or sources are not provided for every statement made about past events and circumstances as much of this is a matter of record. However, in producing this assessment I have drawn upon various accounts of the United Kingdom's post Second World War social, economic, political and cultural history provided by Marwick (1982), Turner (2008; 2010; 2013), Beckett (2009), McSmith (2011), Stuart (2013), Todd (2015) and Marr (2017). I have also taken note of the housing situation at these points in time provided by Grindrod (2014) and Turner (2015).

### **Social and Cultural**

The universal welfare provision introduced after the Second World War had done little to remove class distinctions and it is clear that in 1955 social class was still a key part of people's identity. Over 60% of the working population did manual work of one form or another and were inevitably seen as being working class. The prosperity that was emerging was not necessarily uniformly or universally experienced with evident inequalities in society.

Independent Television first started to be broadcast in 1955, but only a third of households had a television set.

### **Housing and Ageing**

In 1955 housing was a national priority. There was a need to both build to address the shortage of homes and replace those that had been damaged and destroyed in the Second World War but also address the squalor and unsuitable conditions in many of the existing homes that remained. In the post-War period the building industry was in disarray and the vast majority of the 800,000 new homes built between 1945 and 1950 were developed by local authorities. A key factor in the Conservatives return to power had been their promise to build more new homes, which they did. In 1954 over 350,000 new homes had been created and over 300,000 more were built in 1955. But to achieve these targets it had been necessary to adopt 'Modern Methods of Construction' including use of prefabricated housing that was intended to provide only a temporary solution while more traditional houses were being built.

Many of the new houses were being built in housing estates or even in New Towns being created away from the existing neighbourhoods so breaking the social ties and support of extended family structures. Although the study of Young and Willmott (1957) on the effects these shifts had on an East London community was critical of process of relocation, the reality was that most people were delighted to relocate if it meant that they could escape from appalling conditions and have a home with an inside toilet, bath, running hot water and fridge all of which, though now taken for granted, were far from universal amenities in 1955.

It was against this backdrop of housing shortages, with the need to provide better housing options for older people living in larger properties or in slum conditions combined with the loss of family and community support that sheltered housing was conceived as a suitable solution. 1955 was possibly the first year in which more than 1,000 sheltered housing properties were developed, but this was a very small proportion of the total number of properties being developed.

In 1955 the average life expectancy was 67 years for a man and 73 years for a woman.

## 1970 – What We Always Wanted?

### Economic and Political

Harold Wilson had become Labour Prime Minister in 1964 (won an even bigger majority in 1966 after a 'snap election') with a promise to promote Britain's position and prospects as a booming meritocracy by embracing the 'white heat of technology'. Although there had been an increase in affluence and rise of consumerism under Harold Wilson, in the 1970 election the uncharismatic Edward Heath became Prime Minister when the Conservatives won a surprise election victory (and a vote against Wilson rather than a vote for Edward Heath) due to a lack of confidence in the economy (following a forced devaluation of the pound in 1967). Although in 1970 British Petroleum announced that it had discovered a major oilfield in the North Sea, but it was some time before this would have an impact on the United Kingdom's economy

### Social and Cultural

By 1970 more working class people were starting to share in the affluence of the consumer society. In 1950 an average manual worker had to work for 34 minutes to buy a pint of beer, but (taking account of inflation) in 1970 this had reduced to just 18 minutes. A particular consequence of the improved standards of living was the increase in ownership of household appliances. In 1960 less than a third of households in the United Kingdom had a fridge or a washing machine but by 1970 more than half did. In 1970 household consumption patterns were also changing behaviours with dramatic increases in the sales of frozen pizza and oven chips as more households had freezers as well as fridges.

Although in 1970 less than half of households had a telephone, over 90% of households had a television. Most televisions were black and white (with numbers of colour televisions not exceeding black and white sets until 1977) and there were only three channels yet families spent on average 18.6 hours per week watching television. Classic programmes of the time were Coronation Street, Doctor Who and the comedians Morecombe and Wise. The Sun newspaper had been bought by Rupert Murdoch in 1969 and commercial radio, having been resisted by Labour, was introduced in 1971.

Hoggart (1957) had foreseen the importance of the media on culture and class and despite the increased affluence of society, class still played an important role in how this was experienced. The 1960s had challenged the moral code that had been established in the Victorian era and replaced it with a more permissive outlook. Society had been sexually liberated by the National Health Service (Family Planning) Act 1967 which opened up access to the contraceptive pill, abortions had also been permitted by the Abortion Act 1967 and the 1967 Sexual Offences Act had legalised homosexuality. 1970 was the first year of the Glastonbury Festival, the year the Beatles disbanded and Dana won the Eurovision song contest with 'All Kinds of Everything' and there were chart hits that year from a wide variety of artists from Elvis Presley and Simon & Garfunkel to Jimi Hendrix and Black Sabbath

## Housing and Ageing

The house building boom had continued and had reached a peak output of 425,000 properties in 1968. Houses in the 1970s lacked architectural interest being 'box like' in design with few features and even chimneys omitted in properties with electric or gas heating. Central heating, however, was still not common with just a quarter of houses having this. Many of the new properties being built were flats rather than houses with a considerable number of these also being in tower blocks. But a gas explosion and collapse of a tower block at Ronan Point in East London just weeks after it had been opened in 1968 undermined public confidence in modernist high rise living. There was also a recognition that Britain would not only be able to build its way out of its housing problems and the Housing Act 1969 had shifted the emphasis away from the demolition of unsuitable or unfit housing towards its restoration with the aid of home improvement grants.

Sheltered housing was becoming increasingly popular as a source of warm, safe and secure accommodation for older people and over 10,000 sheltered housing properties were developed for social rent in 1970. Demand for sheltered housing remained strong and a number of housing associations had been formed specifically to provide this form of housing (e.g. Hanover Housing Association formed in 1963 by National Corporation for the Care of Older People; Housing 21 formed in 1964 as the Royal British Legion Housing Association; and Anchor Trust formed in 1968 as Help the Aged (Oxford) Housing Association).

The demand for sheltered housing was particularly associated with the increasing number of widowed women living alone with 3.14 million widowed women compared with 0.76 million widowed men in 1970 which was a consequence of the numbers of men killed in the Second World War combined with the tendency for women to live longer and to have married older men. The National Insurance (Old Persons and Widows Pension and Attendance Allowance) Act 1970 recognised that older people were getting older and frailer so introduced an additional pension entitlement for those over 80 and attendance allowance as a non-means tested benefit for those with additional support needs.

In 1970 the average life expectancy was 69 years for a man and 75 years for a woman.

## 1985 – Ambition and Antagonism

### Economic and Political

1985 was in the middle of Margaret Thatcher's period as Conservative Prime Minister (from 1979 to 1990) and was two years into her second term of office. Any post Second World War political consensus had certainly disappeared and this time has been characterised as a period of success for some and strife for others. The emphasis was on self-interest and advancement, privatisation of state undertakings and free-market economics. Margaret Thatcher is famously said "there is no such thing as society" to emphasise that people should take personal responsibility for themselves rather than seek assistance from the state.



The 1980s had seen a period of sustained global economic growth and prosperity with increasing affluence and exceptional wealth for those with links to financial services and the City. 1985 was also the year of peak production and revenues from North Sea Oil. It was a time when growth and greed were considered to be good. For some class seemed to matter less than money and many people saw themselves as moving from working class into the middle class, for those left behind, the gap between the 'haves' and the 'have nots' may have felt like an unbridgeable gulf. The divisions were not just between rich and poor, but also South and North, employed and unemployed, white and black. In 1985 there were racial tensions and disturbances in Handsworth and Brixton and Lord Scarman delivered his verdict on earlier race riots in 1981 in Toxteth and Peckham citing economic deprivation and racism as the underlying causes.

Perhaps one of the biggest divisions and disputes of 1985 was with the National Union of Mineworkers who had been on strike since March 1984 until they were forced to capitulate in March 1985. 1985 also saw the formation of the Anti-Apartheid movement and on-going protests about United States nuclear cruise missiles being deployed at Greenham Common.

But the political divisions were not all confined to the policies and positions of the Conservatives as leading members of the Labour Party had split off to form a more moderate Social Democratic Party in 1981 whilst in 1985 the Labour Party was also engaged in a struggle to suppress the rise of the Trotskyist Militant Movement from within its ranks and in Liverpool in particular.

### **Social and Cultural**

The increased affluence of the 1980s fuelled spending on consumer goods and designer brands. Supermarkets became superstores, cinemas became multiplexes, building societies became banks and everything became bolder and brasher as typified by the television series Dallas and Dynasty.

There was at least one television in virtually every home, with Channel 4 being added to the choice of channels in 1982 and people accessing films via VHS tapes from video rental shops. As more people got cars the road network became increasingly congested with the M25 reaching capacity almost as soon as it was completed in 1986. 81% of homes had a telephone and the network to allow mobile phone calls was established in 1985, but there were few such phones in use as they were not particularly mobile and very expensive. The decision was also taken in 1985 to phase out traditional red telephone boxes. The 1980s also saw the start of home computing with the introduction of the Sinclair 'ZX80' computer in 1980 followed by the 'Spectrum' in 1982 and the Commodore 128 KB computer in 1985 and by 1985 13% of households in the United Kingdom had a home computer. 1985 also saw the first registration of an internet domain name.

Compact Disks (CDs) were introduced in 1982 and in 1985 the Dire Straits album 'Brothers in Arms' was the first music CD to sell a million copies in the UK. 1985 was also the year of the Live Aid concert to raise money for famine relief in Africa.

## Housing and Ageing

By 1985 most homes had central heating and double glazing as well as many modern conveniences including microwave ovens and freezers. There were also more homes than households in the United Kingdom such that the housing problem became one of suitability, desirability and affordability. By 1985 many local authority homes had been already been purchased and converted to home ownership under the Right to Buy scheme introduced by the Housing Act 1980 that gave local authority tenants the right to buy their Council House at a substantial discount and within ten years over 1.9 million Council homes had been sold. Housing association properties were exempted from the Right to Buy scheme as were sheltered housing properties for older people. House prices were starting to rise with an increase of 7% in 1985 but with an overall increase of over 100% during the 1980s making it harder for those not already on the property ladder to get on it, but also creating additional wealth for those with properties compared to those without.

The Building Act 1984 had introduced improved building standards to make new homes safer and more energy efficient. People were heating their homes to temperatures 5°C above the average home temperatures in 1970. Fire safety was a priority with the requirement for fire escape routes, fire resistant construction and regulations for fire resistant furnishings being introduced in 1988.

Some sheltered housing was facing demand issues and classified as being 'difficult to let', especially where the properties were small studio flats, had shared facilities or were in poor locations. Questions were also raised about the purpose and costs of sheltered housing compared with other forms of housing for older people (Butler et al, 1983) with suggestion that this created a division between the 'lucky 5%' (Bytheway, 1984) and 'the few who got so much' (Middleton, 1982a) compared with the majority who received little support.

In 1985 the average life expectancy was 73 years for a man and 78 years for a woman.

## 2000 – Extra Spin

### Economic and Political

Tony Blair and 'New Labour' came to power in the 1997 general election with a huge swing from Conservatives of John Major who had come to be seen as the 'nasty party'. This was the first Labour majority government since 1966 and widely acknowledged to have been achieved as a result of a triumph of marketing and repositioning of the Labour Party. It consciously branded itself as being 'new' to break the link with past associations and rewrote the symbolic commitment to socialism in Clause IV of the Labour Party Constitution calling for common ownership of the means of production, distribution and exchange. Much of the success of New Labour has been attributed to its chief 'spin doctor' (Press Secretary) Alastair Campbell who professionalised the management of the media messaging. Tony Blair proved himself to be adept at capturing and representing a public mood of popularism and modernism without actually making many radical changes. One rare exception was when he tried to give a political speech at the Women's Institute and was heckled. Although the politics of New Labour were not so different from the more moderate elements of the Conservative Party it was far more successful in getting its message across.

The divisions in the Labour movement however had not entirely gone away and the former leading Labour Party member, Ken Livingstone, became the first elected Mayor of London in 2000 standing as an independent with the official Labour candidate Frank Dobson in 3<sup>rd</sup> place.

Although the European Union was going through a tough economic period in early 2000s, the United Kingdom's economic position remained relatively strong in 2000 with GDP growth of 3.7%, inflation of under 3% and unemployment at 5.4% and on a downward trajectory.

### **Social and Cultural**

Society was becoming more diverse but cultures were also becoming more homogeneous. There was a desire for culture to become more democratic and participative as evidenced by the emergence of reality TV with Big Brother launched in 2000 and the talent show Pop Idol (the fore-runner of X Factor) in 2001. Desire to participate in mass movements had been demonstrated by the public grieving following the death of Princess Diana but was also manifest in public enthusiasms for the likes of Mr Blobby, Tim Henman and Harry Potter books. Public affection and fascination with footballer David Beckham and his pop star wife Victoria (Posh Spice), who despite their extreme wealth were still seen and portrayed by the media as being 'ordinary' people who had done well and made good.

The Queen Mother celebrated her 100<sup>th</sup> Birthday in 2000, but her profile and popularity as the face of the Royal Family during the Second World War was becoming less significant. Margaret Thatcher was the last Prime Minister to have any memories of WWII and Tony Blair declared himself to be child of the 1960 and to have grown up with the Beatles. As the United Kingdom became more diverse it also became more secular and religion was parodied in television shows such as Vicar of Dibley and Father Ted.

Annual sales of DVDs (first launched in 1998) went above 1 million copies for the first time in 2000, but VHS video tapes still remained the dominant format for home video. From virtually no penetration in 1985 by 2000 47% of households had a mobile phone and 42% of households had a home computer.

### **Housing and Ageing**

In 2000 68% homes had double glazing and 79% had central heating. Housebuilding had declined to around 150,000 properties per annum. There was increasing pressure for new housing to be built on previously developed 'brownfield sites' with a target set for this to apply to 60% of development by planning policy (PPG3). The Egan Report (1997) 'Rethinking Construction' also called for a re-evaluation of prefabrication and greater adoption of 'Modern Methods of Construction'.

In 2000 the concept of Extra Care housing was emerging as a new alternative to traditional sheltered housing providing more extensive communal facilities, meals in an on-site restaurant and access to care staff on a 24 hour 7 days a week basis if required. Since 2000 virtually all development of specialist housing for older people for rent has been of Extra Care rather than Retirement Housing.

In 2000 the average life expectancy was 76 years for a man and 81 years for a woman

## 2015 – Suitability and Sustainability

### Economic and Political

David Cameron had been the Conservative Prime Minister since 2010 in a coalition government with Liberal Democrats, but after the general election in May 2015 became the Prime Minister with the first Conservative majority government since 1997.

After an initial need for stimulus in response to the 2008 Global 'Credit Crunch' and Financial Crisis the government embarked on a policy of 'austerity' to bring down government borrowing. By 2015 the public sector deficit was half what it had been in 2010, but the government still maintained that further cuts and savings were needed across the public sector with the exception of the NHS.

### Social and Cultural

Environmental concerns were starting to enter the public and political consciousness. In 2015 the Conservatives, Labour and Liberal Democrats came together to make a cross party commitment to tackle climate change and to end coal power generation and the Supreme Court had ruled that the government had a responsibility to take immediate action to tackle air pollution. 2014 had been the hottest year in the United Kingdom ever recorded. Storms were becoming so frequent that in 2015 the metrological office started giving them names. 2015 also saw the hottest ever United Kingdom July temperature of 36.7°C (in London) and hottest United Kingdom November temperature of 22.4°C in Wales. In December 2015 storms caused extensive flooding across northern England.

2015 was the year when the Volkswagen cheated the emissions tests on their diesel cars with 1.2 million of vehicles in UK affected. David Cameron pledged £300 million to address the challenge of dementia affecting the ageing population and make the United Kingdom a 'dementia friendly' nation. The first female Bishop was ordained in 2015.

95% of households had a mobile phone in 2015 and the Apple iphone was in its 6<sup>th</sup> iteration (iphone 6s and 6s Plus) having been first launched in 2007 and this was the year when the Apple watch was introduced. In 2015 the percentage of households with a 'landline' telephone had reduced from 95% in 2000 to 88%. 88% of households had a home computer in 2015.

### Housing and Ageing

In 2014 'Approved Document L' had been introduced into Building Regulations as a penultimate step before the introduction of requirements for homes to be built to a zero carbon standard

The emphasis of the Conservative government shifted away from social and affordable rented housing towards development of housing for sale or shared ownership and under pressure from the government the National Housing Federation agreed to accept the introduction of a voluntary Right to Buy arrangement for housing association properties. The Chancellor of the Exchequer, George Osborne, announced in his 2015 budget that housing associations would be required to reduce their rents by 1% in the subsequent four years in a drive to both cut expenditure on housing benefit but also drive efficiencies within the housing association sector. Later in 2015 the government also announced plans to cap housing benefit for supported housing (including specialist/sheltered housing for older people) at Local Housing Allowance (LHA) rates that would have required such schemes to apply to local authorities for top up funding and would have meant that only schemes that were being actively supported and the services commissioned by the local authority would have been viable. This presented a major threat to the sustainability of Retirement Housing and Extra Care and although the plans were finally abandoned some two years later, questions about the future purpose and funding of specialist housing for older people first raised in the mid-1980s still remain.

In 2015 the average life expectancy was 81 years for a man and 84 years for a woman. This is 14 more years of life expectancy for a man and 11 more years for a woman than in 1955.

These 'moments in time' provide a reminder that events of the past are likely to have had an influence on present day perspectives of residents as well serving to explain the shape, nature and purpose of the Retirement Housing and Extra Care services that currently exist. They also act as a prompt to recognise that we are unlikely to have reached the end of history and the way Retirement Housing and Extra Care are perceived, configured and understood today will inevitably be subject to new influences and expectations in the future. It is therefore necessary to develop an appreciation that is dynamic and contingent rather than stable and static.

At an individual level the economic and cultural experiences that older people will have encountered through their life course are likely to play a significant role in shaping their attitudes and expectations. As fewer older people recall the austerity and inadequacy of post-War housing and more will have grown up with the cultural liberation and modernism of 1970s, the consumerism of the 1980s this may alter views and opinions about the nature of housing and services that they will consider to be desirable or unacceptable.

The building and design standards of the past when Retirement Housing and Extra Care schemes were developed continue to play a significant part in shaping the size, design and features of that these forms of housing can offer. The micro attitudes and meso opportunities can also be seen to have been both shaped by as well as playing a part in influencing the macro social, political and economic opportunities and constraints that are applicable in different eras.

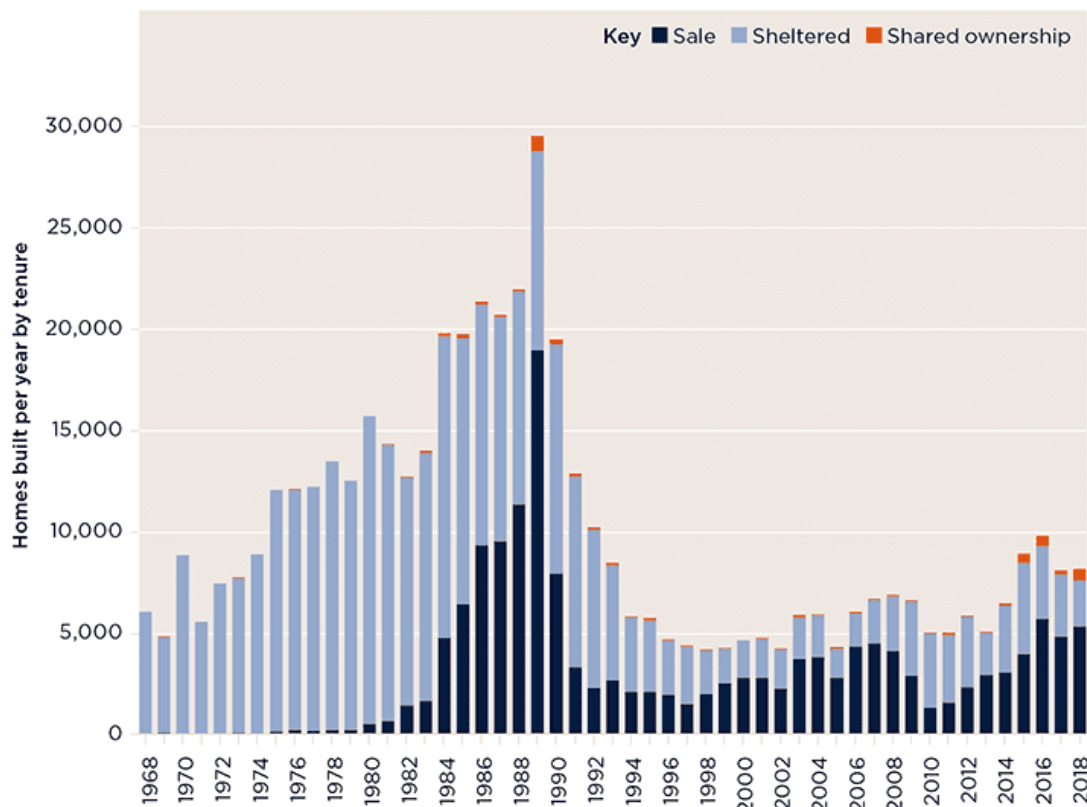
## 2A.3 Patterns of Provision

In 2015 the Elderly Accommodation Counsel database showed there were some 515,666 age specific 'sheltered housing' properties in almost 16,000 developments across England (Elderly Accommodation Counsel, 2015). Of these the vast majority 455,644 (88%) are classified as Retirement Housing (i.e. age specific housing with some design features and/or support) compared with just 60,022 (12%) as Extra Care (i.e. with access to personal care and/or meals). Of these 75% (388,630) of properties are provided for rent and 25% (127,036) are owned outright or on a shared ownership basis.

The Elderly Accommodation Counsel (2015) data suggests that on average there were 123 units of sheltered housing with support (Retirement Housing) and 16.2 units of sheltered housing with care (Extra Care) per 1,000 population aged over 65 in England. However, as the Audit Commission (1998) noted, levels of provision of sheltered housing varied considerably across the country. Wyre in Lancashire has 22.7 units of Retirement Housing per 1,000 population over 65 compared with Wyre Forrest in Worcestershire that has 284.7. Some areas have no Extra Care provision while others have more than 80 units of extra care per 1,000 population aged over 65 (e.g. Milton Keynes 84.8 and Hartlepool 82.7) (Elderly Accommodation Counsel, 2015). This haphazard pattern of provision had arisen as a consequence of the absence of any coherent central or local government policy on the provision of specialist housing. Decisions about what and how much specialist housing for older people was developed and the extent to which the interests and position of older people were considered in planning and policy has largely been left to local discretion, opportunism and the preferences of particular providers and individuals. The absence of any consistent rationale or strategy for the development of 'sheltered housing' was highlighted by Butler et al (1983) and again by the Audit Commission (1998). It was still identified as an issue by the National Strategy for Housing in an Ageing Society in 2008 (Department for Communities and Local Government, 2008) which acknowledged that "planning has not provided the kinds of housing that older people needed, in the places where they want to live" (p109) and concluded that "specialised housing must be planned more strategically in the future" (p139). However, without greater clarity of purpose, provision and preference with regard to Extra Care and Retirement Housing it does not seem likely that this position will change. The differences in the patterns and character of provision are though relevant and important considerations and context for seeking to understand the position and perspectives of residents, as each Extra Care or Retirement Housing site will have its own specific characteristics and circumstances which may both influence and also be affected by their residents' preferences.

As Figure 2A.1 shows, the peak period for the development of sheltered housing for rent was in the early 1980s. As a consequence there is now a considerable proportion of the stock of Retirement Housing properties that is over 30 years old and potentially requiring investment to keep it up to date and up to contemporary standards and expectations. The Audit Commission (1998) considered that much of the older sheltered housing had become unsuitable or unfit for occupation by older people so should be decommissioned. Although there are suggested ways in which existing provision could be adapted and improved to meet modern expectations and requirements (Torrington, 2004), questions are still being asked about whether traditional sheltered housing has a future (Sinclair, 2009, Institute of Public Care, 2012).

**Figure 2A.1 Numbers of Retirement Properties Developed each year for Sale, Sheltered Rent and Shared Ownership** (source Galvin, 2016)



By 1994 the number of new retirement properties being developed for rent was a quarter of what it had been at its peak in 1984 and Tinker et al (1995) identified a significant problem of sheltered housing that was considered 'difficult to let'. Even though Tinker et al (1995, p143) recognised that the position was complex and there was not one simple solution, they concluded that many older people were only willing to move to small and sub-standard sheltered housing because they were desperate. It was also noted that a particular consequence of sheltered housing becoming difficult to let had been a tendency to try to let properties intended for retired elderly people to those in their late middle age, often with different and more chaotic lifestyles, which was considered likely to lead to more division and dissatisfaction.

The age at which someone is considered to be an older person in order to be eligible of occupation of sheltered housing is commonly set at 55 years<sup>7</sup>, but Best (2013, p165) suggests “today nobody believes that most 55 year olds need the shelter and protection of a live-in warden and the supervision of their daily recreation”. This exposes fundamental questions about what sheltered housing is and who it is for. The Audit Commission (1998, p24) thus found that “the current pattern of sheltered housing provision is entirely historic and is not related to any identifiable levels of need or demand”.

A key principle, and supposedly a positive feature, of specialised housing for older people was its provision of smaller properties that were considered to be more suitable and convenient. But attempts to limit development costs by reducing the size of individual dwellings may have been a false economy. Space standards were set at 30m<sup>2</sup> for a bedsit flat, 39m<sup>2</sup> for a one bedroom flat for a single person and 44.5m<sup>2</sup> for a one bedroom flat for a couple (Hanson, 2002). In 1994 25% of sheltered housing properties were bedsits, 66% were one bedroomed flats and only 9% of sheltered housing had two or more bedrooms (Galvin, 1994). Even though there has since been a move away from further provision of bedsit flats and a trend to build more two bedroom properties, the norm remains for retirement properties to have just one bedroom. It has been suggested that the ‘spatial compression’ created as a consequence of adopting a scientific approach to the assessment of the space requirements of residents of sheltered housing is responsible for imposing an architectural disability on residents (Hanson, 2001, p35) and that quality of life for older people requires more than merely ensuring buildings are safe and functional (Barnes, 2002; Barnes and McKee, 2001).

Figure 2A.1 also illustrates that whilst sheltered housing for rent was being developed at scale by local authorities and housing associations since the 1960s, it wasn’t until the late 1970s and early 1980s that retirement properties started being built for sale to owner occupiers. House builders McCarthy & Stone built their first retirement scheme in 1977 and have since developed more than 54,000 retirement properties for sale (Fenton, 2017). But apart from McCarthy & Stone and Churchill Retirement Living<sup>8</sup>, there are very few other developers that have built significant numbers of retirement properties for purchase and McCarthy & Stone still accounts for some 70% of all developments of owner-occupied sheltered housing (Fenton, 2017).

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<sup>7</sup> 55 was the average life expectancy at birth in 1914, but by 1950 life expectancy had increased to 66 for males and 72 for females and in 2010 was 79 for males and 83 for females (Office for National Statistics, 2015).

<sup>8</sup> Churchill Retirement Living was formed in 1994 by the Sons of the founder of McCarthy & Stone



The development of retirement properties for sale started to take off in the mid-1980s just as critical questions were beginning to be asked by Butler et al (1984) and others about the policy, practice and consumer perspectives on the provision of sheltered housing. In a booming property market, especially in the affluent South-East of England, the development of retirement properties for sale accelerated to a peak in 1989 of some 17,000 properties<sup>9</sup>. But this then dropped back drastically to under 2,000 properties in 1992, because of the effects of the bursting of a property market bubble which saw interest rates rising above 14% and prices falling by some 20%. This appears to have undermined confidence in the market for retirement properties for sale. Although there was a modest increase in levels of development of retirement properties in the rising property market of the 2000s this collapsed again in 2010 as a consequence of the 2008 financial crisis. The specialist developers of sheltered housing for sale claim that the reason more properties are not being built for purchase by owner occupiers is not due to a lack of demand, but because of market circumstances that favour developers of other forms of housing (Ball et al, 2011; Sodha, 2015). It has been proposed that, in order to unlock the potential benefits that the availability of more retirement properties could provide in the housing market, incentives such as stamp duty exemptions or waiver of planning requirements for affordable housing provision or infrastructure payments should be considered (Ball et al, 2011; APPG on Housing and Care for Older People, 2013; Wood, 2013). However, the suggestion that incentives are needed to make retirement properties an attractive purchase proposition, may be an indication (possibly beyond the scope of this thesis) that there is cause for concern about the desirability and degree of consumer connection with the current market models of retirement provision.

## **2B: Variety, Terminology and Purpose**

### **2B.1 Difficulty of Definition**

Attempts to develop clear definitions and a consistent terminology for age-specific housing have been described as being 'vexed' (Biggs et al, 2000). Howe et al (2013) found over 90 different terms in the literature from the United Kingdom, United States, Canada, Australia and New Zealand for accommodation built specifically for older people in which the housing provider also has responsibility for delivery of some form of support and/or care service. Atkinson et al (2014, p17) similarly found a "diverse and confusing terminology" in use across European countries. This complexity can be exacerbated by different providers giving different names and putting

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<sup>9</sup> Approximately double the volume of sheltered housing developed for rent

their own branding on what are essentially the same service models, but there can also be “wide variations in the size, design, accommodation, range of facilities and level of support provided” even when the same name or descriptor is used (Dickinson and Whitting, 2002, p39).

Driscoll (2008) recognised that the array of terms may simply be a consequence of the unstructured way in which these services had developed and evolved, but considered that the variety of terminology used to describe different forms of specialist housing for older people with different degrees of support and/or care was inhibiting understanding and creating problems for both individuals and the industry itself. Howe et al (2013) also considered that this diversity of names and meanings was confounding attempts to undertake a systematic analysis of provision and policies. However, demands from Bligh and Kerslake (2011) for adoption of a standard and consistent approach to classification of provision, based on set criteria linked to the condition, design, location and other local circumstances, do not seem practical given the unique characteristics of each service and setting. Brenton (1998) even suggested that there needed to be more, rather than less, differentiation in order to draw distinctions based on more than the physical features or service specifications in order to also recognise the importance of alternative models of management and control.

## **2B.2 Classifications and Continuums of Provision**

Croucher et al (2006) recognised that there had been a shift from a position when provision of specialised housing for older people could simply be categorised as either a care home or sheltered housing, to a situation in which there is more complexity and diversity. But the market report from property agents Knight Frank (Gilmore and Scaife, 2018) considered that the retirement housing sector in the UK was becoming more defined by the segmentation and separation of retirement housing (with less care on site) and housing with care (with increased provision of communal facilities and on site care). This thesis has similarly drawn a distinction between ‘Retirement Housing’ (with support but no care) and ‘Extra Care’ (with on-site care, catering and enhanced communal facilities) and selected these as the two categories of provision it is seeking to explore the extent and significance of differences and commonalities of preference and perspective within and between. Although this reflects the shift in emphasis and approach to the provision of specialised housing for older people that occurred in the late 1980s, it is acknowledged that this was primarily a pragmatic choice that was significantly influenced by the fact that these are the two service classifications adopted by Housing 21.

There have been various attempts to systematically define and categorise the different types of housing and care provision for older people in order to fit them into a framework or structure.

Robson et al (1997) developed a scale of seven levels of housing options for older people, adapted from earlier versions from Valins (1988) and Salmon (1993).

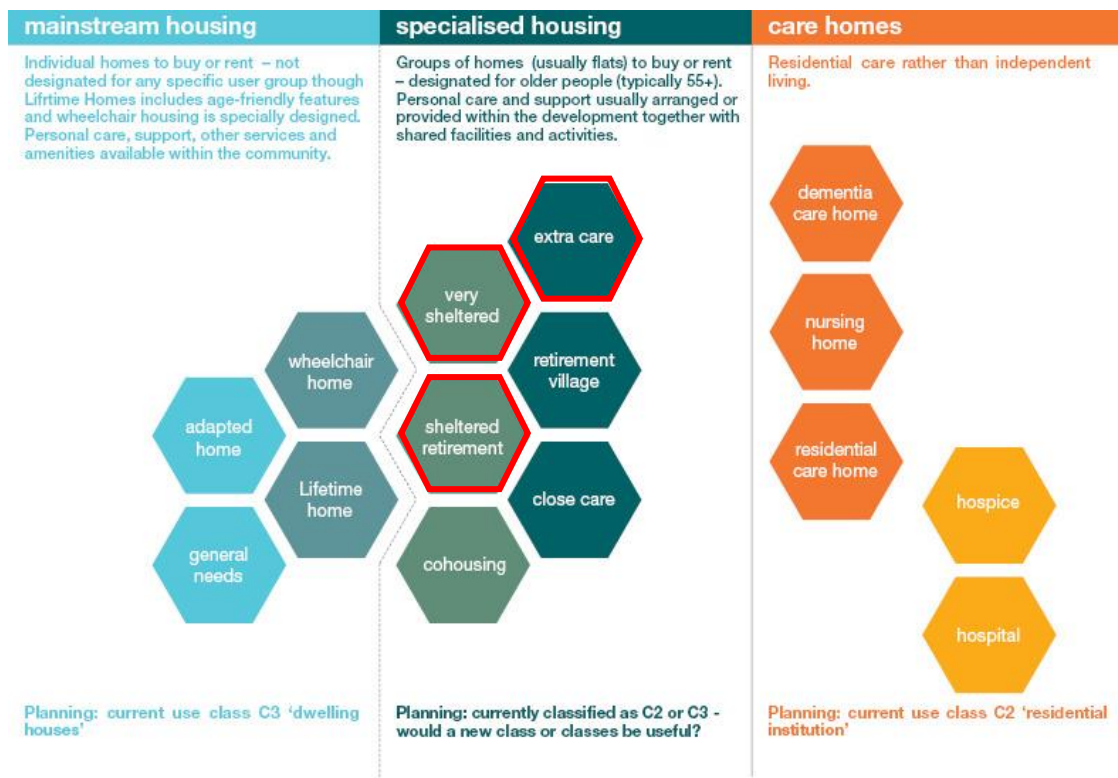
- Level 1: Staying Put (in 'General Needs' Housing)
- Level 2: Moving To a More Suitable Home
- Level 3: Category I Sheltered Housing
- Level 4: Category II Sheltered Housing
- Level 5: Category 2½ Sheltered Housing (Extra Care)
- Level 6: Residential Care Homes (Part III Homes)
- Level 7: Nursing Homes and Geriatric Care Units

Just within the scope of specialised housing for older people McCafferty (1994) identified 4 categories of types of provision as:

- Specially designed housing with no warden support
- Housing with warden support but no communal facilities
- Sheltered Housing
- Extra Care or Very Sheltered Housing

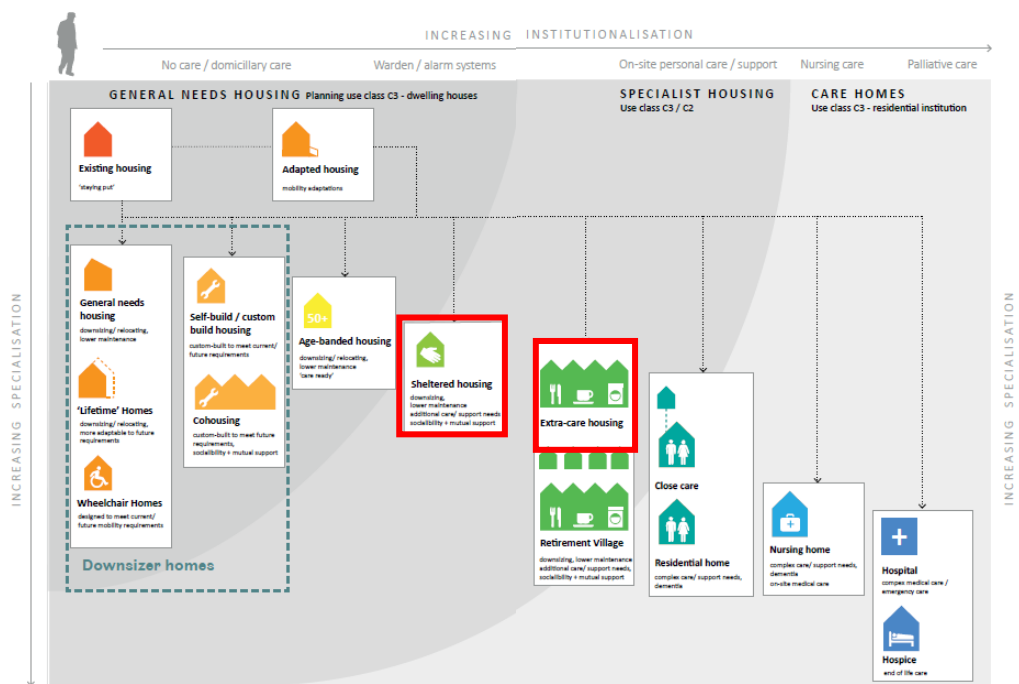
The HAPPI Report (Homes and Communities Agency, 2009, pp10-11) presented a spectrum of different housing options according to the intensity of support and care provided using three categories of 'mainstream housing', 'specialised housing' and 'care homes', as shown in Figure 2B.1.

**Figure 2B.1: HAPPI Spectrum of Provision** (Homes and Communities Agency, 2009)



The DWELL project (Park et al, 2016, pp4-5) produced a similar spectrum that considered the increasing degree of specialisation and institutionalisation in different models of housing and care, illustrated in Figure 2B.2. The emphasis of this thesis is on understanding the preferences and opinions of residents of Extra Care and Retirement Housing but not older people living in retirement or care village settings nor in general housing or institutional care. The elements of the spectrum of provision subject to scrutiny in this study are outlined in red on Figures 2B.1 and 2B.2<sup>10</sup>.

**Figure 2B.2: DWELL Continuum of Provision (Park et al, 2016)**



### 2B.3 From ‘Sheltered’ to Retirement Housing

The term ‘sheltered housing’ has become something of a generic term that is frequently used to refer to a range of specialist housing for older people with support. Butler et al (1983, p53) speculated that the origin of the term came from a 1944 Housing Manual (Ministry of Health, 1944) in which reference was made to the most appropriate location for housing for older people and the need for this to be “within easy distance of churches and shops ... [and] ...to assist in keeping the dwelling warm a sheltered site should be chosen”. This meteorological and geographical perspective has been superseded by a social connotation of being protected from the storms of everyday life rather than the weather<sup>11</sup>.

<sup>10</sup> ‘sheltered retirement’ (2B.1) and ‘sheltered housing’ (2B.2) corresponds to Housing 21’s Retirement Housing and ‘very sheltered’ and ‘extra care’ (2B.1) and ‘extra care’ (2B.2) relate to Housing 21’s Extra Care.

<sup>11</sup> The notion of a safe haven is reflected in the names adopted by two leading housing association providers of sheltered housing (Anchor Housing Association in England and Bield Housing Association in Scotland).

Despite there being no statutory definition of sheltered housing, Circular 82/69 issued under the Ministry of Housing and Local Government Act 1969 did seek to classify sheltered housing as being either Category 1 or Category 2. Category 1 schemes were those without communal facilities or an on-site warden and were typically comprised of bungalows or groups of flats without lifts. The intention was that Category 1 provision should be for the relatively independent and active elderly. Category 2 schemes were normally in a single building and were required to include communal facilities, an on-site warden, a means of summoning help in an emergency and lift access to upper floors. The intention was that Category 2 provision would be for more dependent elderly people. Although these categories have not had any formal status since 1980, and were frequently blurred in their interpretation and application, they are still occasionally referenced in the social housing sector to differentiate types of provision. However, both Category 1 and Category 2 provision fall within the scope of what is considered by Housing 21 to be classified as Retirement Housing.

A statutory reference to 'dwelling-houses for persons of pensionable age' was, however, made by the Housing Act 1985 (Schedule 5, Paragraph 10) as an exception to the Right to Buy provisions for local authority properties. To fit within that exemption properties not only had to be particularly suitable for occupation by older people because of their location, size, design, heating systems and other features, but specifically needed to also have either a resident warden or a non-resident warden with a system for calling for help plus use of a common room in close proximity to the dwelling.

Wood (2013) expressed concern that the term 'sheltered' created a negative perception that had the potential to create confusion and contradict the emphasis otherwise given to 'independent living'. Oldman and Quilgars (1999, pp368-369) had similarly articulated a view that the concept of sheltered housing had become stigmatised and was seen as being a thinly disguised form of institutional care that was inconsistent with independence and personal autonomy. As a consequence the term 'sheltered housing' is seldom welcomed as a descriptor by residents or providers and hence the widespread moves to re-brand and re-classify such services predominantly as Retirement Housing.

## 2B.4 The 'Extra' of Extra Care

The term Extra Care was introduced to describe schemes developed for frailer elderly people that had direct access to 'extra' care services, on-site meal provision and additional communal facilities. These services are sometimes referred to, without any formal regulatory recognition, as 'Category 2½' schemes to indicate they were positioned in the territory between Category 2 sheltered housing, which often did not meet full mobility or wheelchair standards, and residential care established by Part 3 of the National Assistance Act 1948. Although this type of provision is now most commonly described as Extra Care it is also referred to by an array of alternative descriptions including 'very sheltered housing', 'housing-with-care', 'close care' or 'assisted living' as well as also potentially coming within the scope of a 'retirement community' or 'retirement village'.

It has already been noted that Tinker et al (2007) referred to Extra Care as 'a concept without a consensus' because of the lack of clarity about what it is and suggested that the ability for it to be subjectively 'self-styled' to suit the preferences of providers and policy makers created a risk that it would become a description devoid of meaning. Wright et al (2010) had similarly asked what the 'Extra' is in Extra Care and were concerned that the absence of a clear definition and specification made it difficult for older people, their relatives and social workers to know if an Extra Care scheme was likely to be suitable because they could be so idiosyncratic and variable in what they offered.

Riseborough and Fletcher (2003) suggested that the three key features of housing with care (i.e. Extra Care) services were its: primacy as a form of housing and not as an institution; provision of support to allow people to 'age in place'; and promotion of independent living. This, however, said little about the nature of the services provided. Although King (2003) was more specific in providing a list of defining characteristics including: self-contained flats or bungalows; design features and assistive technology to facilitate independence; the provision of flexible packages of care in privacy of each residents' own home; and the availability of 24 hour care and support, these are still open to a many different interpretations and configurations. A consultation on the scope of what Extra Care should include (EROSH et al, 2005), despite proposing what appeared to be a quite general definition and identifying only a limited number of essential components that would be required for a scheme to be designated as Extra Care, failed to achieve a consensus.

The Associated Retirement Community Operators (ARCO), which represents the operators of many housing with care facilities, used the Laing and Buisson (2010) definition of Extra Care in setting the criteria for a scheme to be eligible for registration.

To be eligible for ARCO accreditation facilities must:

- Be primarily for older people
- Offer self-contained accommodation that can be occupied with security of tenure
- Enable residents access to flexible personal care from staff based on the premises
- Have staff on site 24 hours a day
- Make domestic services available to residents
- Make meals available in a restaurant or dining area
- Provide communal facilities and encourage an active social programme
- Aim to offer a home for life

(ARCO, 2017).

The Housing 21 Extra Care sites featured in this thesis fall within the scope of the ARCO criteria, but still require further clarification and specification in order to really understand what they provide and who they are for. Although Burholt et al (2010) confirmed a preference for maintaining a mix of fit and frail residents, Extra Care has consistently been proposed as an alternative or even a replacement for residential care (e.g. Fletcher et al, 1999). However, the findings of a study by Darton et al (2011) indicated that entrants to Extra Care were less physically and mentally impaired than people typically entering residential care. This suggests that moves to Extra Care were being made, at least in part, for positive choice reasons rather than as a response to a crisis. Blood et al (2012) also found that there was a lack of clarity about the purpose and level of care that Extra Care was intended to provide. West et al (2017, p1878) concluded that this ambiguity of purpose was problematic and created tensions as residents sought to “negotiate the dialectics of dependence and independence” and although complaints were dismissed as ‘fantasmatic’ they were clearly very real and intensely held by the residents themselves. Suggestions that more emphasis should be given to Extra Care as a housing rather than a care solution (e.g. Gaul, 2017), however, risk giving substance to the criticism that Extra Care schemes represent “islands of over investment” (Glynos et al, 2014). The conclusion of an evaluation of Extra Care housing in Wales (Batty et al, 2017) was that the evidence of benefits in terms of cost savings were very anecdotal and often over-exaggerated with improvements to well-being and quality of life difficult to quantify or substantiate. As a result it has been hard to make definitive claims or generalisations about what Extra Care is, who it is for and the benefits it produces. Even though this thesis is not seeking to make a formal evaluation of Extra Care, by providing a better understanding of what residents do or do not consider to be the essential or desirable aspects of Extra Care this may help produce a better appreciation of their motivations for living in this type of setting.

## **2C: Attitudes, Evidence and Opinions**

### **2C.1 Dimensions of Evidence and Debate**

As an abductive study, this thesis has not set out to review or evaluate the existing literature in order to find a situation or proposition to test, challenge or validate. Its scope was not set by a formal literature search and so does not have a traditional literature review chapter. It is nevertheless appropriate to establish an appreciation of the scope, extent and variety of opinions which studies and commentators have produced or expressed as a consequence of the different approaches, intentions and outlooks that have been adopted. These set the context for this study and provided the impetus and imperative to seek a way to conceptualise them into a coherent theoretical framework.

Chapter 3 provides a review of the evolution, influences and approaches that have been adopted to the theorising of housing and ageing. Chapter 5B shows how, in accordance with the principles for an abductive inquiry (Blaikie, 2010, p91), the statements that set the scope for this study were developed 'bottom up' from the views of residents rather than 'top down' from a body of existing literature. Appendix 4, however, does provide an overview of the literature and an assessment of debates about the issues identified in respect of each of the statements that set the scope for the research study undertaken. These discussion of the findings in Chapter 9 also seeks to show how the results from this study relate to and can be situated within particular academic fields of study.

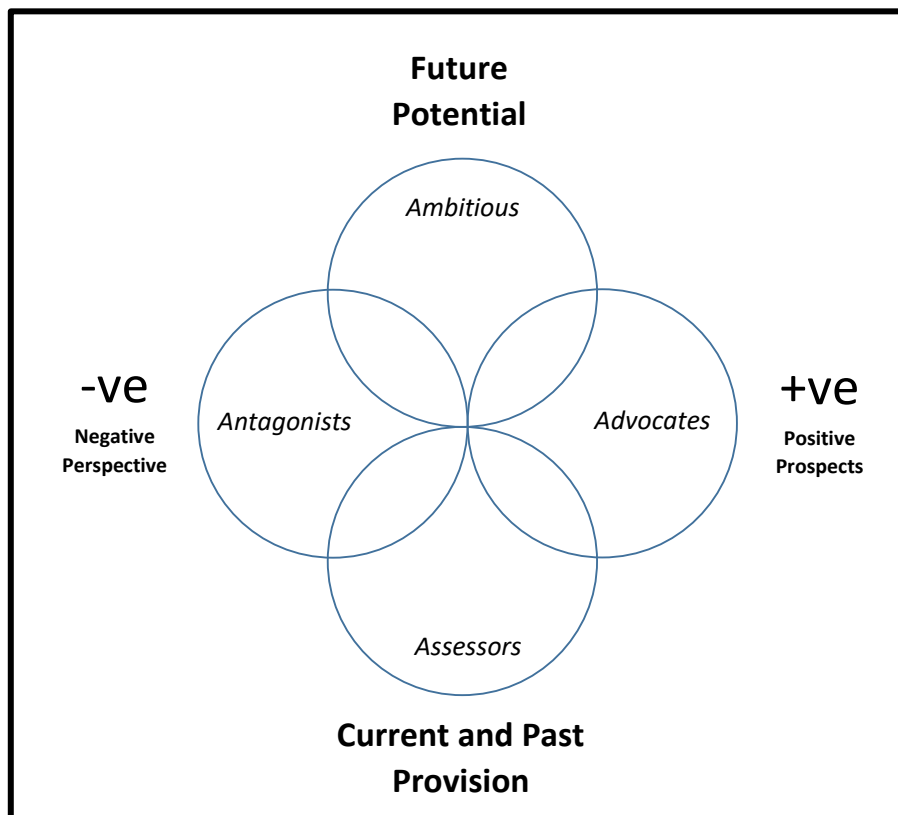
As was acknowledged in Chapter 1, there is no a shortage of literature on specialist housing for older people. However, because of the range and diversity of perspectives and positions that have been produced, attempting to capture and reconcile even a sample of the available evidence and articulations of views about the nature, purpose and provision of specialist housing for older people into a unified typology is a challenge. This may be attributable at least in part to the lack of a clear theoretical framework, but is also likely to be linked to the lack of consensus and clarity of definition to determine exactly what Extra Care and Retirement Housing is and why it is being provided as well being a consequence of the dynamic nature of preferences and perceptions. It is though difficult to reconcile the substance of what different studies have had to say about what specialist housing for older people is, how it should be designed, what it should include, who it is for and the benefits it can produce, because there is no consistency of perspective.

In order to provide a frame of reference within which differences of position and outlook towards Extra Care and Retirement Housing could be conceptualised, I produced a matrix that considered



the time orientation and the apparent disposition of different studies toward specialist housing for older people. As shown in Figure 2C.1, this produces four primary research perspectives characterised as: ‘Assessors’ (past and present orientation), ‘Advocates’ (positive disposition), ‘Ambitious’ (future orientation) and ‘Antagonists’ (negative disposition). Without claiming to provide a conclusive or comprehensive assessment of the literature relating to Extra Care and Retirement Housing, I have sought to present a selection of research studies and comments based on this framework.

**Figure 2C.1: Framework for Mapping the Orientation and Disposition of Studies and Literature on Specialised Housing for Older People**



## 2C.2 The Assessors

Assessor studies consider the nature, character and quality of actual services and the reactions and responses to provision as it is or was when the study was undertaken. Some assessors may approach this task with a view to accentuating either positive or negative aspects of the services provided while others may attempt to maintain a stance of neutrality, but such attitudes appear to secondary to the main purpose of making an assessment.

Although undertaken more than 30 years ago, one of the most comprehensive studies of Retirement Housing was undertaken by Fennell (1987), who considered the nature of the sheltered housing provided at 140 schemes operated by three Scottish housing associations combined with feedback from 801 residents. This report could be seen as the culmination of a series of other similar studies over the preceding five years. Wirz et al (1982) had interviewed 217 residents of 33 local authority and housing association sheltered housing schemes in Scotland and in the same year Middleton (1982a) had interviewed 140 residents from 4 schemes in Merseyside. In 1983 Bulter et al published their comprehensive assessment of sheltered housing provision based on interviews with 608 residents from 52 local authority and housing association schemes in England and Wales. In the following year Cunnison and Page (1984) conducted 270 interviews with residents and wardens from 13 local authority sheltered schemes in Hull and in the year after that Bloomfield (1985) analysed responses from 622 completed questionnaires from residents of 21 local authority sheltered schemes in Coventry. Fennell (1986) had also undertaken a study based on interviews and questionnaire responses from 863 residents of 100 retirement housing schemes in England run by Anchor Housing Association.

As well as confirming the generally high levels of satisfaction of residents, these studies served to highlight the extent and nature of the facilities being provided by sheltered housing. The findings of many of these studies was that the needs of residents of Retirement Housing were not significantly different from the range of needs within the general population of older people (Alexander and Eldon, 1979; Goldberg and Connelly, 1982; Butler et al, 1983). This led to the conclusion of some of these assessments that sheltered housing provided 'so much for so few' (Middleton, 1982) and residents of this accommodation were 'the lucky five percent' (Bytheway, 1984) and hence represented 'an elite' sub-set of the wider older population (Wheeler, 1986).

When nearly 1,700 people over 50 were asked, on behalf of the major developer of sheltered housing for sale (McCarthy & Stone), what they felt sheltered housing should provide, 77% said it should have a resident manager, 73% mentioned having a lounge and communal facilities and 26% though it should include a swimming pool (Harris Research Centre, 1989). But even with the benefits and facilities that sheltered housing does provide, many studies found it was not considered to be a desirable option by the vast majority of older people (Tinker, 1984; Smith 1986; Tinker, 1989; McCafferty 1994). There were signs in the mid-1990s that expectations had altered and increased and as a consequence some older and less suitable sheltered housing was becoming 'difficult to let' (Fletcher, 1991; Tinker et al, 1995). The assessment of the Audit Commission (1998) was that patterns of sheltered housing provision were "entirely historic and not related to any identifiable levels of need or demand" (p24) and that there was "no clear vision for the future role of sheltered housing" (p31). Although the assessment of the Better

Government for Older People project, formed from listening to the views of older people, was that there continued to be support for sheltered housing to be provided as a positive choice for some older people, there were also concerns about the variability in its quality and the level of support it could provide (Hayden and Boaz, 2000, pp11-12).

Since 2000 much of the focus of assessments has switched from Retirement Housing to the provision of Extra Care, but rather than simply considering the facilities and services provided, greater emphasis has also been given to trying to assess and evaluate the impact that this type of accommodation had on the well-being of its residents (e.g. Croucher et al, 2006; Vallely et al, 2006; Croucher et al, 2007; Evans and Vallely, 2007; Callaghan et al, 2008; Darton et al, 2008; Callaghan et al, 2009). But the results from these assessments remain inconclusive. Although larger Retirement/Care Village developments fall outside the scope of this thesis, there has also been a particular interest in assessments of the dynamics within these facilities (Phillips et al, 2001). Some of the pioneer developers and providers of Retirement and Care Villages were keen to have them evaluated and assessed by academics, but these assessments did not always provide the ringing endorsements that had been anticipated as impressive buildings and facilities alone did not necessarily guarantee the formation of a harmonious community (e.g. Croucher et al, 2003 – Hartrigg Oaks; Bernard et al, 2004 and Bernard et al, 2007 - Berryhill Retirement Village; Bartlam et al, 2006; 2013 and Bernard et al, 2012 – Denham Garden Village; Evans and Means, 2007 – Westbury Fields Retirement Village).

More recently a number of assessments have been made, not of specific services, but of the levels of provision and projections of future need for specialist Retirement Housing and Extra Care within particular regions and localities (e.g. Steele, 2010 - Leicester; Carter-Davies and Hillcoat-Nallétamby, 2015, Batty et al, 2017, Institute of Public Care, 2017 and Housing LIN, 2018 – Wales; Archer et al, 2017 – Greater Cambridge; Three Dragons, 2017 – London).

Cutchin et al (2003) responded to the call from Moore (2000) for assessments to be made not only of the provision of Extra Care itself but also the ease of adaptation to and transitions within it. Assessments of the consequences of living in Retirement Housing and Extra Care can, however, appear inconsistent or contradictory. Nocon and Pleace, (1999, p14) noted that sheltered housing is popular with residents and Jerrome (1992) found it was conducive to the formation of new friendships and a sense of community, but evidence from Field et al (2002) suggested that some people felt more lonely when living in sheltered housing and Walker et al (1998) discovered that a move to sheltered housing often fractured previous social links and relationships. It is perhaps not surprising therefore that Hadjri (2010) identified a continuing need for assessments in order to better understand the experiences and preferences of older people living in Retirement Housing and Extra Care which this thesis is seeking to help address.

## 2C.3 The Advocates

**Advocates are those who conduct studies or produce reports that accentuate the positive aspects of specialist housing for older people, whether in the form of Retirement Housing or Extra Care. Advocates often link their promotion to assessments and descriptions of the desirable features that such properties and service offer. Some advocates look critically at current provision in order to suggest future changes and improvements that are required, but their motivation and intent in doing so is to emphasise the potential benefits that such enhancements would bring.**

Some researchers and independent commentators have a genuine commitment and consider there to be a sound basis for their conviction that specialist housing is a desirable and positive option for older people. However, it is recognised that many advocates are also providers of Retirement Housing or Extra Care or others who have a vested interest in the success of the specialist housing sector and who have sought to gain legitimacy and support for their provision of properties and services by either producing their own studies and reports to promote the merits of such services or sponsoring others to do this on their behalf.

Advocates seem certain that more specialised housing for older people will be needed as the population ages (Wittenberg et al, 2006; Oldman, 2014). Studies have shown that one in four older adults will require care at some stage as they age (Bebbington et al, 2001) and it is estimated that a considerable proportion of these people could be better accommodated and looked after in Extra Care or Retirement Housing setting than in a care or nursing home (Pannell et al, 2012).

Analysis has shown that there is a substantial differential between the costs of residential care and the rent and service charge costs of both Retirement Housing and Extra Care (Curtis, 2007). A report by Frontier Economics (2010) suggested that the net benefit of capital investment in providing more supported housing for older people could be in the order of £219 million per annum, based primarily in savings on more expensive hospital and care home costs. An assessment by Cap Gemini calculated that an investment of £198.2m in Retirement Housing had created a net financial benefit of £646.9m and £32.4m invested in Extra Care had produced a benefit of £123.4m (Department for Communities and Local Government, 2009). However the assessment of McCafferty (1994) was that Retirement Housing and Extra Care were more expensive than general housing and studies by Bäumker et al (2010) and Bäumker et al (2011) found that whilst the health care costs of residents decreased these were more than off-set by higher accommodation, social care and support costs. Yet, despite recognising that around 79% of the older people living in rented supported housing claim Housing Benefit, the Department for Communities and Local Government (2017, p5) concluded that the higher costs of this type of provision should continue to be funded through the welfare system because of the vital role it

plays. To try to counter a perception that the costs of Retirement Housing are higher than for general housing (Age UK, 2011), Hanover Housing Association (2014) got accountants PWC to validate its assessment that downsizing from a private rented family home to a typical housing association sheltered housing property could produce savings, for someone meeting all their own housing and associated costs, of over £5,500 per annum.

It is also claimed that specialist housing for older people has a major impact on the health of residents and hence creates cost savings for the National Health Service and social care. From a review of 52 academic papers and policy reports, the Demos policy think tank calculated that sheltered housing provided an overall social value of £486 million per annum from reduced inpatient stays in hospital, reduced care costs from fall prevention and avoiding the health costs associated with loneliness (Wood, 2017). Similarly Holland (2015) had suggested that the health improvements achieved by residents moving into Extra Care represented the equivalent of a 38% saving in costs to the NHS, and Strzelecka et al (2019) claimed that the National Health Service benefited by approximately £2,000 per annum for every person living in a housing with care property. Irrespective of the cost benefits it is also maintained that “sheltered housing can have a major preventative and enabling role for vulnerable older people who wish to remain in the community and out of institutional care” (Mills and Prophet, 1998). Pannell and Blood (2012) found that some 60% of people moving to affordable Retirement Housing or Extra Care properties reported doing so for a ‘disability related requirement’.

It is claimed that “the value driven from sheltered housing and extra care housing can be found in benefits to the individual, to the community and to the taxpayer” (Berrington, 2017, p6). Advocates clearly believe that “good quality retirement housing ... has huge potential to help people live healthier and longer lives” (Sodha, 2015, p8), but this does not mean that they are not aware or willing to be critical of some of the shortcomings of existing provision. In making the case for development of more Extra Care and Retirement Housing to be a national priority Lord Richard Best also acknowledged that “a good deal of sheltered housing from yester-year now needs substantial upgrading” (Best, 2010, p9) and Beaman (2007) recognised that perceptions of sheltered housing were that it had become ‘stale and outdated’. It is because of this that many commentators rather than simply being advocates are also ambitious to establish a new paradigm of specialist housing to address the needs and aspirations of older people.

## 2C.4 The Ambitious

**Ambitious studies seek to set aspirations and ascribe the characteristics of the housing options and opportunities that older people would most desire. Ambitions tend to be inherently future oriented and focused on improvement and articulate how current provision should be improved. This may or may not be linked to provision of specialist housing and the ambitions tend to be more concerned with general principles rather than the specifics of current service classifications.**

Following on from the launch of a National Strategy for Housing and Ageing Society (Department for Communities and Local Government, 2008), the Homes and Communities Agency commissioned a panel of architects, housing developers and providers, commentators, policy experts and older people chaired by Lord Richard Best to consider the needs and aspirations of the ageing population. This became known by the acronym HAPPI (Housing our Ageing Population: Panel for Innovation) and they sought to address their brief by listening to stakeholders before then embarking on a tour of 24 specialist housing for older people schemes in six countries across Europe. From this the panel produced a set of 10 overarching design criteria that epitomised what they considered aspirational 'age-ready' housing should have (Homes and Communities Agency, 2009). The 10 HAPPI features are summarised as:

- Generous internal space standards
- Plenty of natural light in the home and circulation spaces
- Balconies and outdoor space, avoiding internal corridors and single-aspect flats
- Adaptability and 'care aware' design which is ready for emerging telecare and tele-health technologies
- Circulation spaces that encourage interaction and avoids an 'institutional feel'
- Shared facilities and community hubs where these are lacking in the neighbourhood
- Plants, trees and the natural environment
- High levels of energy efficiency, with good ventilation to avoid overheating
- Extra storage for belongings and bicycles
- Shared external areas such as 'home zones' that give priority to pedestrians

(Best and Porteus, 2016, p21)

The HAPPI acronym has since been used in further studies and reports under the sponsorship of the All Party Parliamentary Group on Housing and Care for Older People in order to continue to question how provision of housing for an ageing population can be improved (e.g. Housing our Ageing Population: Plan for Implementation (Best and Porteus, 2012) and Housing our Ageing Population: Positive Ideas (Best and Porteus, 2016)).

The National Housing Federation had previously set a vision for housing care and support in an ageing society (Swan, 2009) but, following the HAPPI report, picked up on the idea of promoting what housing for older people should offer, rather than describing or evaluating existing provision. The National Housing Federation's 'Breaking the Mould' report (Boyle, 2011)

identified 9 themes that were considered to be central to what older people wanted and hence recommended a home for older people should be one that:

- is accessible
- is spacious and attractive
- is safe and secure
- is in an age-friendly environment
- offers freedom choice and flexibility
- has help at hand
- provides flexible, personalised support
- lets you socialise and feel included
- allows you to make decisions

(Boyle, 2011, p10)

A further project, referred to by the acronym DWELL (Designing for Wellbeing in Environments in Later Life) (Park et al, 2016) was established to consider the aspirations and principles that needed to be considered when developing and designing housing suitable for an increasingly diverse population of older people with different desires, but without specifically focusing on specialist provision. The DWELL project proposed 8 themes suggesting a home should be:

- Connected
- Spacious
- Accessible
- Adaptable
- Pleasurable
- Manageable
- Sociable
- Green

(Park et al, 2016)

Although the study by Park et al (2016) was multi-disciplinary, questions of design appeared to be central to their assessment of how these ambitions and principles for the future provision of housing for an ageing population should be addressed. A tool for Evaluation of Older People's Living Environments (EVOLVE) (Lewis et al, 2010) had previously been developed and this similarly appeared to be premised on the assumption that solutions would be highly influenced by design.

The tendency to emphasise the physical characteristics and the design of properties has been persistent (e.g. Tinker, 1983; Robson et al, 1997; Fischer et al, 2012), despite indications that family, social and community networks and an individual's psychological character may also play a significant role in the decisions older people make about where they live (Sykes and Leather, 1996; Callahan, 1993). It is likely that the views and attitudes older people have about the desirability and suitability of their housing will in practice be the product of a combination of physical, social and personal considerations (Sixsmith, 1986; Peace et al, 2006).

Barac et al (2007) proposed a vision for an aspirational 'Elderflowers' model of retirement living based on high quality purpose built accommodation, constructed to generous space standards, with communal facilities that included features such as a swimming pool or tennis courts, the provision of broadband and wireless internet services for all residents but with very few staff so that people would maintain their independence and service charges would be kept low. But ambitions and aspirations, such as this, do not exist in a vacuum. Bourdieu (1984) and Bourdieu and Wacquant (1992) developed the appreciation that aspirations are not limitless but are contingent upon a person's setting, circumstances and experiences. This is recognised in this thesis by use of Q methodology because it requires participants to prioritise and rank their preferences so does not allow residents to identify multiple top priorities.

Senior Cohousing, that involves older people living 'apart and together' as members of an intentional community created and run by its residents, has been proposed as an ambitious alternative to the traditional models of specialist housing provision for older people (Brenton, 2001; Brenton, 2013). Whilst many positive attributes are ascribed to such communities (Quinio and Burges, 2019) utopian outcomes cannot be guaranteed (Sargisson, 2012; Fernandez et al, 2018) and they have proved exceptionally difficult to fund and develop (Brenton, 2013; Scanlon and Arrigoitia, 2015). Interest in senior cohousing could be interpreted as being a response to problems of both poor quality and design of many sheltered housing schemes of the past and perceptions of unresponsive and unaccountable management (Stevens, 2013). But older people can be given the opportunity to have greater say and control without necessarily implementing a full cohousing solution (Mullins and Stevens, 2016). There are also concerns that co-living and communal models may run counter to what many older people want, with Boys-Smith (2018) pointing out that history has shown that as societies become more affluent their preference has always been for more space and privacy with a trend away from rather than towards collectivism and communalisation.

## **2C.5 The Antagonists**

**Antagonists are opposed to specialist housing for older people, often as a matter of principle and regardless of the satisfaction many people who live in that type of accommodation claim it gives them. Their disapproval may be due to perceived deficiencies and a view that current provision is inadequate or inappropriate. Alternatively it might be based on their assessment of the implications and consequences on society and others of housing older people in special age segregated settings and an attitude that such settings are considered irredeemable even with improvements to the design or specification of the services they offer.**



Kuhn (1977) labelled retirement communities “playpens for the old” that become “ghettos of increasing dependency”. Bytheway (1982) similarly suggests that sheltered housing is inherently ageist, institutional and equivalent to “living under an umbrella” that reinforces a sense of dependency.

Many of the criticisms and much of the antagonism towards housing specifically for older people appears to be because of its inherently special and age segregated character. Evans (2009) questions the basis for assertions and assumptions that older people want to live in age segregated settings and suggests that the lack of diversity may ultimately undermine their sustainability. Oldman (1986) and Wheeler (1986) both suggest that the focus on specific and segregated housing for some serves to disguise and divert attention away from the social and economic disadvantage of a wider spectrum of older people. McGrail et al (2001) noted the prominence given to research and discourse regarding sheltered housing was disproportionate to the proportion of older people who live in this type of accommodation. Although Middleton (1982) and Bytheway (1984) referred to so much being given to the ‘few’ and the ‘lucky five percent’, Clapham and Smith (1990) suggest that the older people who live in specialised housing in fact pay a high price for the convenience, facilities and reassurance that specialist segregated housing provides in terms of stigma and institutionalisation.

It cannot be assumed that age specific retirement communities will necessarily be age friendly (Hrybyk et al, 2012; Liddle et al, 2014). Kastenbaum (1993) noted that residents in age segregated settings had a tendency to opt out of society and develop aggressively age-conscious identities, while Laws (1995) observed a tendency to criticise those who maintained intergenerational links and exclude those who due to physical infirmity or mental capacity did not live up to image of a ‘positively ageing community’. Biggs et al (2000) also found that retirement communities could create unrealistic expectations of positive and active ageing with associated pressures to conform.

Fisk (2002) questioned not only the spatial impositions of sheltered housing, but also suggested that the surveillance and supervision from a warden could serve to infantilise residents. Tinker (1989) found little evidence to support assertions that residents in sheltered housing provide mutual help and support to one another and Brenton (2001) suggested this was because sheltered housing in its traditional form was a paternalistic concept with “a third party providing and managing accommodation for older people who are essentially strangers to each other” (p180).

## 2C.6 Irreconcilable Perspectives

In the context of whole systems analysis, predicaments and situations that are complex, multifaceted and appear to be irreconcilable have been called ‘elephant problems’ (Harries et al, 1999). This appears to be a metaphorical reference to the fable of ‘the blind people and the elephant’ that has its origins in early Hindu teachings (Woodward, 1974; Case 2004) and is now popularised in western culture by the poem of John Godfrey Saxe (1936)<sup>12</sup>. In the tale six blind people each encounter a different part of an elephant and draw conclusions about what it resembles. The person touching its side thinks it is a wall, the tusk is mistaken for a spear, the trunk is like a snake, a leg is taken to be the trunk of a tree, the ear regarded as a form of fan and the tail considered to be a rope. While each was partially accurate they were of course all wrong, but that did not stop them arguing ‘stiff and strong’ for their own interpretation.

This metaphor has been used in multiple contexts but might also provide an insight into the apparently irreconcilable differences of position and perspective of researchers with regard to the nature and merits of Extra Care and Retirement Housing. Rather than continuing to engage in ‘theologic wars’ between disputed factional views this thesis is seeking to find a theoretical framework that will allow perspectives to be combined and reconciled. This metaphor will also be revisited in Chapter 4 when considering the epistemology of Q methodology and its potential to do what Puchala (1972, p269) described as “one of the most difficult intellectual feats” of research, namely “to confront a phenomenon, recognise its novelty and then go on to describe and explain this novelty without destroying it with blunt and analytical instruments”.

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12

It was six men of Indostan  
To learning much inclined,  
Who went to see the Elephant  
(Though all of them were blind),  
That each by observation  
Might satisfy his mind

The First approached the Elephant,  
And happening to fall  
Against his broad and sturdy side,  
At once began to bawl:  
God bless me! but the Elephant  
Is very like a wall!

The Second, feeling of the tusk,  
Cried, Ho! what have we here  
So very round and smooth and sharp?  
To me tis mighty clear  
This wonder of an Elephant  
Is very like a spear!

The Third approached the animal,  
And happening to take  
The squirming trunk within his hands,  
Thus boldly up and spake:  
I see, quoth he, the Elephant  
Is very like a snake!

The Fourth reached out an eager hand,  
And felt about the knee.  
What most this wondrous beast is like  
Is mighty plain, quoth he;  
'Tis clear enough the Elephant  
Is very like a tree!

The Fifth, who chanced to touch the ear,  
Said: Even the blindest man  
Can tell what this resembles most;  
Deny the fact who can  
This marvel of an Elephant  
Is very like a fan!?

The Sixth no sooner had begun  
About the beast to grope,  
Than, seizing on the swinging tail  
That fell within his scope,  
I see, quoth he, the Elephant  
Is very like a rope!

And so these men of Indostan  
Disputed loud and long,  
Each in his own opinion  
Exceeding stiff and strong,  
Though each was partly in the right,  
And all were in the wrong!

Moral:  
So oft in theologic wars,  
The disputants, I ween,  
Rail on in utter ignorance  
Of what each other mean,  
And prate about an Elephant  
Not one of them has seen!

## **Chapter 2 Contribution**

*This chapter has sought to define and frame the features and facets of Extra Care and Retirement Housing that form the basis for this study. It has demonstrated that not only has the nature and character of these services evolved over time, but also suggested that perceptions of them are likely to have been influenced by the effects of the changing political, economic and social environment and the personal circumstances, characteristics and experiences of the people making the assessments. It is evident that there are different interpretations and attitudes towards specialised housing for older people and this chapter has suggested that these are an inevitable consequence of the apparently irreconcilable nature of the various approaches, intentions and outlooks that had been adopted to make assessments. It is thus suggested that a new approach is needed in order to better understand and integrate the influences that shape the perceptions that residents of Extra Care and Retirement Housing have of these services and settings.*

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## Chapter 3

### Theoretical, Critical and Holistic Perspectives

*This chapter indicates the importance of theoretical insights in order to aid understanding and assesses how theory has been developed and shaped in a housing and gerontological context by normative assumptions and perspectives. It recognises that critical thinking can, by considering the positioned and subjective nature of perception, challenge assumptions and create opportunities to find new perspectives. The chapter concludes by identifying the need to adopt a holistic approach that considers the implications of multiple influences and the interconnected nature of micro, meso and macro experiences that can serve to integrate and triangulate different positions.*

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## **3A: Need for a Theoretical Perspective**

### **3A.1 The Importance of Theory in Housing and Ageing**

Theory involves “the construction of explicit explanations in accounting for empirical findings” (Bengtson et al, 1997, p5). Theory provides the crucial conceptual foundations for developing hypotheses and propositions that serve to frame research questions, explain findings and inform interventions. Theories help to systematize knowledge in order to explain the ‘how’ and ‘why’ behind the ‘what’ of data (Putney and Bentson, 2008). It is said that “there is nothing as practical as a good theory” (Lewin, 1951, p169) as theory also guides decisions to determine whether interventions will achieve their desired effect (Hendricks et al, 2010).

However, studies in the fields of both housing and gerontology have been criticised for being more empirical than theoretical. Despite interest and debate about age and ageing, this remains a topic that is relatively underdeveloped in terms of theory (Bury, 1995; Bengtson and Schaie, 1999) with gerontological research being characterised as ‘data-rich and theory-poor’ (Birren and Bengtson, 1988; Birren, 1999). Housing research has similarly been seen as being confined to a ‘narrow empiricism’ of measuring and specifying rather than developing theoretical understanding (Kemeny, 1992).

Crawford (1971) considered that studies of ageing had become too focused on assessing policies and practice, with the consequence that systematic theorising of the needs and circumstances of the ageing population had been discouraged. Estes (1979) felt that, because gerontologists had been too content to provide descriptions of the lifestyles and activities of older people, they had failed to look for causal links between ageing and the social, economic and political environment.

Bengtson et al (1997) found that 72% of gerontological research studies published between 1990 and 1994 lacked any specific theoretical reference. Bengtson and Schaie (1999, p16) observed that “many researchers in gerontology seem to have abandoned any attempt at building theory” and there was a sense of “disenchantment with ‘general theories’ of ageing”. Although ten years after their first observation Bengtson et al (2009) considered that “theory appears to be growing in importance in gerontology”, a subsequent study (Alley et al, 2010) found that between 2000 and 2004 61% of gerontological research studies still lacked any specific theoretical point of reference.

Gerontology has from its inception been an interdisciplinary field of study, involving medicine and biology as well as behavioural and social sciences, which Estes et al (1992) suggested may have contributed to the lack of consensus and a range of fragmented and contested views about what constitutes a valid theory of gerontology. It has likewise been argued that “housing is so large in

scope and impinges on so many areas of life, that it cannot be conceptualised under the rubric of only one discipline” (Franklin, 2006, p2). Whilst there are potential benefits and advantages to be gained from working across multiple disciplines and paradigms, if something is multi-faceted it can also be more difficult to theorise. Elzinga et al (1985) warned of the dangers of slipping into ‘abstract empiricism’ or ‘epistemic drift’, while Kemeny (1992, p13) suggested that if not integrated and reconceptualised into a new understanding then multi-disciplinism “too easily becomes non-disciplinary or a-disciplinary, resulting literally in a lack of discipline in the organisation of research”.

### **3A.2 Developing Theory by Abduction**

This thesis has adopted an abductive approach that seeks to discover and describe the lived experiences and perceptions of older people as residents of Extra Care and Retirement Housing. However, the aim of abduction is not simply to expose and elaborate on existing ideas about a situation, it also seeks to use the insights obtained as a basis for proposing and identifying new theoretical perspectives.

Whilst deductive or inductive research strategies are play an important part in the validation of theories and propositions, they are not ‘ampliative’ (Will.1988) and do not generate new concepts or conjectures. Abductive analysis rejects the notion that research can only be undertaken in logical manner when it is known what is being looked for and avoids the use of ready-made categorizations and conceptions.

Glazer and Strauss (1967, p37) suggested that “an effective strategy is ... literally to ignore the literature of theory and fact of the area under study, in order to assure that the emergence of categories will not be contaminated”, but their ‘grounded’ approach to theory was nevertheless still essentially a method of induction. Although ‘grounded theory’ seeks to avoid the constraint of having pre-determined the categories into which findings should be allocated, it is nevertheless still seeking to test and substantiate known propositions. This may avoid what Robertson (2002, p790) referred to this as an ‘academic paint-by-numbers’ approach, but it is still bound by a particular ‘frame of reference’ through which the structures and features of the landscape are viewed. An abductive study, by contrast, does not start out on a particular path and by not following down the already well-trodden routes it seeks to find new vistas and create the opportunity for new theorising based on conjecture and speculation.



Even within an abductive study it is, however, helpful to have a familiarity with the topography of the various academic fields likely to be encountered. This can avoid a repetition of what is already well established and familiar, but also provides a basis for comparison of abductive theory to consider the degree of coherence or contradiction with what has gone before.

This chapter of the thesis is thus not seeking to explore existing theories and theorising of housing and ageing in order to locate propositions to test or prove. It is instead trying to appreciate and assess the existing theoretical context in order to understand the scope and potential for new ways in which Extra Care and Retirement Housing might be better explained and conceptualised on a theoretical basis.

## **3B: Theorising Housing**

### **3B.1 Theories of Housing, Home and Identity**

Allen and Gurney (1997) suggested that the study of housing is not distinctive enough to be regarded as an academic discipline that is capable of being theorised in its own right. Although Kemeny (1992) accepted that housing depended on being conceptualised in terms of the theories also applicable to other disciplines, he did not consider this meant that housing needed to be a theoretical parasite and suggested that housing studies should seek to contribute to debates and the development of theories applicable to other domains and across the social sciences. King (2009, p41) similarly took issue with the 'apologetic' view that whilst housing studies might apply theories developed elsewhere, it was not substantive enough to produce or sustain theories of its own. King maintained that housing, as with any other social science, is concerned with social relationships so should not be precluded from being a source of theoretical development.

A problem with trying to develop a theory of housing however, is that the term housing is unspecific and can be interpreted both as a noun (a structure that can be built and demolished, produced and consumed, bought and sold) as well as a verb (describing the process of people being housed, the provision, allocation and experience of living in houses). In order to be theorised the specific aspects and dimensions of housing that are being considered do first need to be identified and defined.

King (1996) had noted the tendency to study housing at a macro level, concerned with matters of policy, supply and consumption, and as a consequence ignore pertinent (and potentially more interesting) questions about how housing is designed, provided and used as well as considering what happens within and behind front doors once dwellings are occupied. Saunders and

Williams (1988) have though sought to shift the focus of housing studies away from the dwelling and towards issues of household identity and the social processes associated with the environment in which people live. A person's home not only provides a physical setting, it also sets the social context for their lived experiences as well as shaping their sense of self and identity (Marcus, 1995; Proshansky et al, 1983). As was noted in Section 2A.2 above, because the significance of a person's home is rooted in their own personal history and circumstances, this will inevitably also be subject to change and will evolve with their changing and cumulative experiences and expectations over their life course (Marcus, 1992; Rowles and Ravidal, 2002; Rowles and Watkins, 2003; Watkins and Hosier, 2005).

This thesis will thus seek to consider issues relating to the attitudes and preferences regarding specialist housing for older people not just from a physical point of view in terms of the features and setting, but also from a social perspective in terms of the support and connections it provides and in terms of the personal and psychological impact and impression it creates. The challenge, however, is to find a way to integrate these different elements into a theoretical frame of reference that does not seek to impose a static ideal solution but rather is dynamic and able to address the inherent variability of purpose, provision and perspective.

The concepts of 'home' and 'place' have been criticised for being vague, ambiguous, and used inconsistently, leading to the creation of 'folk theories' (Rapoport, 1993), but they have nevertheless helped to provide an appreciation that housing is experienced in different dimensions. Rowles (1983) applied the concept of 'insideness', as developed by Relph (1976), to identify three aspects and dimensions of the meaning of home in old age as 'physical insideness', 'social insideness' and 'autobiographical insideness'. A number of other triadic conceptions and classifications have also been proposed. Sixsmith (1986) identified three modes of experiencing the home as 'physical home', 'social home' and 'personal home'. Rubinstein (1989) described a corresponding trio of psychological processes linking person to place as being 'body centred' (involving the physical environment that surrounds and supports it), 'social centred' (concerned with social norms and relationships) and 'person centred' (linking environment with identity and status). Oswald and Wahl (2004) also emphasised the importance of considering the personal, social and environmental context within which housing is experienced, while Peace et al (2006, pp6-10) simply identified the need for a multi-layered appreciation and conception of housing concerns and choices.

Many of the theories and views of housing in the context of ageing adopt a frame of reference that assumes that ageing is dominated by processes of economic, social and physical decline. Lawton and Simon (1968) proposed an 'environmental docility hypothesis' that suggested the less competent a person was the greater the impact that environment factors would have on

their housing choices. This was developed by Lawton and Nahemow (1973) into a 'press-competence' model with the concept of 'environmental press' that considered the impact of a person's environment, housing, neighbourhood as well as attitudes prevalent in wider society, in determining their level of comfort and satisfaction in any setting. These ideas formed the basis for a theory of 'person-environment fit' which holds that people will age well in a location if there is a fit between their housing environment and their personal preferences as moderated by their levels of frailty and competence (Kahana et al, 2003; Pope and Kang, 2010). This predicts that as competence declines due to age related impairments the person-environment fit will decline to a point where it undermines the person's health and quality of life and prompts them to relocate to a place and setting with a better fit.

Despite the limitations of binary models that assume that decisions can be reduced to a simple single dimensional choices, Wiseman (1980) sought to categorise the trigger mechanisms that prompted relocation decisions as either 'push' or 'pull' factors. Push factors are those that drive older people away from their current homes and include deteriorating health, difficulty with daily living tasks, home maintenance and worries following loss of a spouse. Pull factors are the influences that attract older people to other housing options, such as being easier maintain, security, social networks and access to amenities. Stimson and McCrea (2004) suggested that this push-pull dichotomy could be used as a basis for the evaluation of housing situations and the attractiveness of other options. But decisions about where to live and satisfaction with different features or aspects of a person's home and environment are likely to depend on multiple influences and circumstances, that cannot be reduced to a simple either 'this' or 'that' preferences. This thesis is therefore seeking to appreciate the more complex and contingent nature of housing and the interaction of multiple competing factors in order to propose a theoretical framework to conceptualise the choices and trade-offs made by residents in Extra Care and Retirement Housing settings according to their particular preferences, position and purpose for living in that setting.

Theories and conceptual models have also been criticised for assuming that older people all behave in a rational manner and make choices on a consistent basis. Clough et al (2004) considered that an individual's housing decisions were likely to be more influenced by emotions than logic and to be subject to a myriad of personal circumstances, life experiences and hopes, dreams and expectations for the future. It is necessary therefore to look beyond reductionist explanations of complex phenomena in order to appreciate the messiness of the real-world housing decisions being made by older people.

## **3B.2 The Challenge of Theorising Housing Decisions**

There has been significant academic interest in the study of housing behaviour to understand the basis for the decisions people make about where they live (Van Ham, 2012). This thesis seeks to advance and address this interest by capturing and considering the insights and perspectives of residents who live in and therefore have first-hand experience of particular Extra Care or Retirement Housing settings. It seeks to capture and analyse the personal preferences, positions and priorities provided as the basis for speculation and proposing of a theoretical basis to enhance understanding of these forms of housing provision. It does not, however, address the question of how or why these residents came to be living in these settings or enquire about the extent or nature of the choices they made or their expectations and aspirations prior to moving. As Coulter et al. (2011, p2758) point out, considerations of housing need, choice, expectation, aspiration and preference are not synonymous, but “are formed in different ways and have different implications”. It is therefore important for these concepts to be defined and distinguished in order to be clear about the distinctions between these different dimensions of housing decisions and help to clarify the scope of this thesis.

- **Housing Needs**

There is a basic human need for shelter, recognised by the United Nations Universal Declaration of Human Rights (United Nations, 1948), but as the most fundamental physiological and safety concerns are satisfied and addressed other higher order needs for matters such as belonging and control then start to become more pertinent. Michelson (1977) thus suggests there is a hierarchy of housing needs in accordance with Maslow’s (1943) theory. It can, however, be difficult to determine where housing needs ends and shifts to become a matter of housing choice and consumer preference. Although needs are concerned with a shortfall against a normative standard based of what is regarded as essential to meet basic requirements (Bramley et al, 2010, p25), those standards vary over time and will be dependent upon differing societal expectations. Because a person’s home performs a multitude of functions in addition to providing basic shelter it can also be difficult to distinguish between true housing needs and other needs that housing helps to address (MacLennan, 1977).

- **Housing Choices and Expectations**

The concept of housing choice is often used as an umbrella term to cover all aspects of housing decision making, but is more specifically concerned with the analysis and study of people’s enacted housing behaviours (Kley & Mulder, 2010). Molin et al (1996) asserted that it is only in the act of making an actual choice that true preferences are revealed. Analysis of the decisions

that people say they would make in hypothetical situations are generally seen as providing an expression of stated preferences rather than revealing the real nature of the choices they would make.

Choices are inevitably constrained and require the weighing-up of competing considerations and options in order to find and select the best solution in all the circumstances (Van Ham and Manley, 2009). Choices thus reflect the reconciliation of preferences and desires against the availability and affordability of alternative options (Timmermans et al, 1994). In order for housing choice to be real there need to be credible alternatives available to select from (Brown & King, 2005), but in some situations there may not be any meaningful or acceptable alternatives available thus making these 'sham' or 'fake' choices (Jones and Sugden, 1982; Sen, 1993; Yung and Leung, 2020). Some households are better able to realize their preferences with regard to housing than others because of their income, resources and opportunities (Mulder & Hooimeijer, 1999). However, if social housing is regarded as only providing a safety net, its residents may have been presented with fewer options and alternatives to choose from (Brown & King, 2005). Hence housing expectations are conceptualized as the likely housing outcomes that people anticipate, regardless of their desirability (Coulter et al, 2011).

- **Housing Aspirations and Preferences**

Choices and expectations are contrasted with housing aspirations and preferences, which exist and apply independently of any contemplation of a move or immediate change of circumstances (Clapham et al., 2014, p2028). Even though housing preferences and aspirations tend to provide a hopeful or optimistic assessment of what is desired or considered to be achievable, they are nevertheless still grounded in perceptions of what might be regarded as being a realistic prospect (Bruce and Kelly, 2013; Kintrea et al, 2015).

Preece et al (2019) considered the extent and basis on which housing aspirations may be influenced by changing frames of reference and Crawford and McKee (2018a; 2018b) suggested that aspirations are reconfigured by the landscape of each historical epoch<sup>13</sup>. An individual's preferences will also change over time and according to the stages and transitions that occur over their life-course (Mulder, 1996; Kok, 2007). But whereas the concept of a life-cycle (Bell, 1958; 1968) was normative and deterministic, suggesting a natural progression of changing needs, the life-course view recognises that different people will have their own individual housing careers (Elder, 1985; Kendig, 1990) and that housing preferences are also dependent on personal value judgements as well as an individual's circumstances (Coolen and Hoekstra, 2001).

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<sup>13</sup> Hence the significance of this thesis considering the shifts that had occurred in the political, economic, societal, cultural and generational environment in Section 2A.1

Social psychology suggests that individuals may adjust their preferences in order to reduce the scope for cognitive dissonance and discrepancy between what they have and what they want (Sirgy et al, 2005; Wu, 2008). This is supported by research that shows that people do tend to be generally content with the housing they have, even when it might be considered to be sub-optimal (Amos et al, 1982; Fine-Davis and Davis, 1982; St. John and Clark, 1984; Amerigo and Aragonés, 1990). There is also evidence that people tend to prefer types of housing they are familiar with or have had experience of (Kersloot and Kauko, 2004; Jansen, 2013; Abramsson and Anderson, 2016).

Preece et al (2019, p88) noted that research into housing aspirations has tended to be dominated by younger people's drive to become home owners and climb the housing ladder (e.g. Clark and Mulder, 2000; Ronald, 2008). But, even though there is a growing recognition that the preferences, choices and aspirations of the older population are an important aspect of housing assessments that warrants greater attention, there still appears to be a tendency for studies to segment this into narrow binary choices between 'staying-put' or 'down-sizing' and between the stark alternatives of 'general' or 'specialised' accommodation (Pannell et al, 2012; Robinson et al (2019). Yet it is recognised that the assessments and judgements that older people make about their housing are highly complex and influenced by many factors (Croucher, 2008).

- **Composite, Constructed and Constrained Decisions**

Housing is a composite good with a bundle of different facets and characteristics (Clark and Dieleman, 1996) that deliver value across multiple dimensions of not only of shelter, security and comfort, but also providing a place of belonging, community, support, identity and status. Because of the interaction and interdependency of these aspects it does not make sense to assess the desirability of each element atomistically. Older people's housing does not exist in a vacuum (Hughes, 2012) yet studies still continue to make claims about housing preferences degree of preference for different characteristics and features in isolation from other propositions (e.g. Mulliner et al, 2020).

Preferences are thus constructed and revealed through the processes of prioritisation, decision making and problem-solving (Rossi 1955; Newell and Simon 1972; Holland et al. 1986; Simon et al. 1987). Gregory et al. (1993) suggest that the forming of preferences is thus more like architecture, establishing a defensible set of priorities, rather than archaeology that seeks to uncover values that are already there. Preferences and choices are regarded as value-oriented and goal-directed activities (Coolen and Hoekstra, 2001), but in making such assessments individuals may make trade-offs because of the limitations of the information available, the amount of effort and resources they are prepared to commit and the time available (Simon, 1991)

which may result in less than optimal decisions being made (Payne et al, 1992; Bettman et al, 2006).

Not only do goals and preferences vary between individuals, they also change over time (Mulder, 1996). However, it is likely that there will be a lag between changing political, economic, social and cultural conditions and changing aspirations (Colic-Peisker and Johnson, 2012, p740) such that the dispositions people have towards housing persist beyond the social conditions which shaped them (Crawford and McKee, 2018a).

The preferences that people express are also constrained by the options available to them (Clark and Dieleman, 1996). People like what is familiar, but if there is no diversity of provision then the preferences expressed will be constrained by the nature of what currently exists (Abramsson and Anderson, 2016). Hence it is consistently recommended (e.g. Hughes, 2012; Robinson et al. 2019; Hrast et al, 2020) that not only is there a need for an increase in supply, but also a need for a greater diversity and range of housing options in order to effectively address the preferences of the growing population of older people. But the advance of neoliberalism and retreat of the state from intervention in the provision of social housing (Rolnik, 2013) is said to be having a direct impact on limiting and shaping the preferences that are expressed (Robinson et al. 2019; Preece et al, 2019).

It is perhaps because of the multiple dimensions, complexities and dynamic nature of housing behaviour that an array of methods and analytical techniques have been used to describe, predict, and explain housing preferences and choices (Jansen et al, 2011). But there is still a need for a theoretical framework that can venture beyond exploration of specific aspects to elucidate the inter-relationship between contextualised subjective preferences, the options and opportunities presented by the particularity of provision and the wider political, economic and cultural environment.

### **3C: Theorising Ageing**

#### **3C.1 The Medical Gaze and Theories of Decline or Success**

The discourse of gerontology has been dominated by bio-medical models of ageing for much of the twentieth century (Katz, 1996; Gullette, 1997). The bio-medical approach regarded ageing as a problem, imbued with pathologies of decline, dependency, decay and deterioration (Phillipson, 1998). Ageing viewed from this perspective is seen as being an involuntary but

inevitable and natural process for all organisms that leads to a decrease in efficient functioning, reductions in adaptive capacities and ultimately to death (Strehler, 1962; Ebrahim and Kalache, 1996).

Much of the bio-medical effort has been preoccupied with attempts to regulate and conquer the ageing process and prevent the occurrence of age related betrayals (Turner, 1995). This has produced a master narrative that juxtaposes the view of ageing as an impending disaster with the positioning of medical science as the saviour able to ameliorate or stave off the ageing process. Foucault (1973) noted the development of a 'medical gaze' as the means of creating and shaping a reductionist discourse that emphasised the priority and legitimacy of physiological treatments whilst undermining other views or concerns about the priority of a person's welfare or quality of life. Foucault (1973; 1977) showed that this not only served to reinforce the status and power of medical professionals, but it also tended to dominate and diminish alternative perspectives of ageing (Moody, 1998; Biggs, 1999; Biggs and Powell, 2001).

The psychology of ageing, despite being a distinct domain of gerontology concerned with the mental awareness and identity of older people, has been drawn by medical norms towards negative oriented studies of decline and adjustment to loss rather than more positive notions of later life (Victor, 2005). Similarly social gerontology, despite seeking to incorporate ideas from other social science perspectives, has also been influenced by the medical problematization of old age and thus theorised ageing as a process of adjustment to loss of function.

Cumming and Henry (1961) described ageing as a gradual but inevitable process of disengagement from interactions and relationships and suggested that this process of withdrawal was beneficial as it facilitated the transition of social and economic power across generations and prepared older people for the inevitability of death with the minimum of disruption. This 'disengagement theory' has been criticised for condoning the marginalisation of older people in society (Shanas et al, 1968), while Rose (1965) suggested that the disengagement older people might simply be a consequence of cultural norms and economic circumstances so not an inevitable feature of the ageing process. Even though disengagement theory is now seldom advocated, there is often still an implicit assumption that older people will be less engaged or active and many policies and practices continue to implicitly reinforce age based segregation and ageist stereotypes. Disengagement theory has also had a significant impact on the evolution of other gerontological theories and counter-theories.

'Activity theory' (Havighurst, 1961; 1963) directly challenged disengagement theory by proposing that successful ageing could be achieved by seeking to continue to maintain the level and types of activity experienced in middle age. Various studies have indicated a link between satisfaction and activity levels (e.g. Burgess, 1954; Kutner et al, 1956; Tobin and Neugarten, 1961; Reichard



et al, 1962; Maddox, 1963; Lowenthal and Haven, 1968; Graney, 1975; Brown and Harris, 1978), but formal testing of activity theory has not proved to be conclusive (Lemon et al, 1972). It is just too simplistic to suggest that there is a direct relationship between activity and life satisfaction without also taking account of a variety of other psychosocial factors and the contingent and complex nature of an individual's interactions with their environment (Fernández-Ballesteros et al, 2001). It was also unrealistic to expect the nature and intensity of activities and interactions to remain the same as people aged, so 'continuity theory' was developed. This conceptualised ageing as a dynamic and continuous process of development and adaptation through the life course (Atchley, 1989; Levinson, 1990) which recognised that attitudes, values, beliefs and behaviours would adapt to fit and reflect changing circumstances (Marris, 1986).

It is suggested that the dichotomy that these theories present between either 'successful ageing' (Havighurst, 1961) or negative stereotypes of disengagement (Cumming and Henry, 1961) is far too simplistic and one dimensional to give sufficient recognition to the full range of ageing experiences (Rowe and Kahn, 1987). Attempts to extend the concept of successful ageing beyond the avoidance of disease and disability have continued to be focused on factors that could be objectively measured (e.g. Baltes and Baltes, 1990; Rowe and Khan, 1997; 1998) and failed to fully appreciate the importance of each participant's particular subjective assessments of satisfaction and personal perceptions of success. It is, however, considered essential to recognise and respect the complexity and multiple dimensions and the subjectivity of each participant's unique point of view in assessing the attitudes and preferences of older people living in Extra Care and Retirement Housing properties.

The concept of successful ageing has also been accused of promoting an idealised notion of later life (Baltes and Carstensen, 1996; Stevens, 2001) and Timonen (2016, p33) suggests that it "has become a deeply confused, self-contradictory, schizophrenic concept". Despite ageing being a complex, differentiated and inherently personal process, there is still a tendency to try prescribe what older people should do and how they should live out their lives in order to achieve the nirvana of success. Thus in their best-selling book '100 Year Life' Gratton and Scott (2016) appear to assume that older people will simply be able to choose to throw off any socio-structural limitations in order to be able to age successfully.

Estes (1986) also noted that studies of social gerontology had tended to adopt a predominantly micro perspective that seldom considered the influence that the macro external environment and structure of society played a part in shaping and determining the different experiences of ageing. It was therefore suggested that theories of ageing were needed that were less positivist and functionalist in nature and instead gave greater cognisance to the complex, conflicted and

contradictory character of older people's subjective experiences as influenced by their social, economic and environmental context.

### **3C.2 A Critical Gerontology**

As a response to concern about the deficiencies in these traditional approaches to the theorising of gerontology, a new 'critical' view was developed, that challenged the dominance of micro-deterministic modes of analysis. Critical gerontology sought to address questions, problems and perspectives that had previously been excluded from mainstream studies (Baars, 1991). It viewed issues of ageing from a structural rather than an individual basis and so resisted the tendency towards 'microfication' of social issues (Hagestad and Dannefer, 2001, p4) and saw the experiences of ageing as being influenced by social forces in a political and economic macro context (Estes et al, 1982).

Critical gerontology did not simply seek to passively understand the social process of ageing but presupposed a more value committed approach that actively sought to subvert the dominant discourse and to critique the ideologies it saw as producing distorted accounts of reality and perpetuating asymmetric power relationships (Bottomore, 1983, p183; Phillipson and Walker, 1987, p12). Age divisions were viewed as being embedded in capitalist inequalities that resulted in older people being economically and culturally marginalized (Phillipson, 1982). Notions of dependency were not only criticised for presenting an unduly pessimistic and negative view of old age by emphasising the consequences of embedded inequalities, they also provided the impetus for 'grey activism' to combat and challenge the policies and practices that had legitimated and caused them (Walker, 1986, p37).

Whilst Mills (1959) maintained that sociological theorising called for the disciplined use of imagination in seeking to understand social phenomena, Ossewaarde (2014, p163) considered it essential for that imagination to also be set within a critical and theoretical context and warned that otherwise "aging research runs the risk of serving particular interests, of reinforcing certain powers and correspondingly of being both blind to hidden dangers and smothering others yet unthought-of". Without a critical stance Allen and Gurney (1997) saw the risk of 'knowledge imperialism' taking hold and leading to the entrenchment of existing perspectives and suppression of other points of view. Alvesson and Kärreman (2011, p14) suggested that the discipline required should come from the systematic collection and analysis of empirical evidence in order to allow for the problematization of existing frameworks and the creation of a critical dialogue.

Critical gerontology thus encourages a more reflexive approach to research about experiences of ageing that questions and challenges taken for granted assumptions. It recognises the value and

distinctiveness of multiple geographical, cultural, social and individual variables and resists the neoliberal tendency towards the homogenisation and convergence of thought and theory (Kerr et al, 1960; Walker, 2018) or imposition of a single unified theory or specified solution (Franklin, 2006).

## **3D: Framing Positions and Perspectives**

### **3D.1 Foucault's Frames of Reference**

Foucauldian thought and theory provides an effective response to the calls from critical gerontology for recognition of the social, economic and discursive context within which people age, by focusing on the ways power is exercised and how it effects the norms and relationships they experience (Biggs and Powell, 2000; Tulle and Mooney, 2002; Powell and Biggs, 2003; Powell, 2011). As well as recognising the effects of the 'medical gaze' (Foucault, 1973), Foucault identified the 'disciplining effect' of particular narratives (Foucault, 1977). He showed how this could arise from an 'archaeology of knowledge' in the way knowledge was organised, presented and legitimated (Foucault, 1972) as well as through a 'dominant discourse' established from the interactions and relationships people had with governing systems and structures (Foucault, 1982; 1991; Rose, 1989).

Definitions and descriptions can have a significant impact on how ageing is perceived and understood (Gullette, 2018). Labels and descriptions of ageing carry with them implicit attitudes and assumptions so it evident that terms such as 'demographic time bomb' or 'tsunami of ageing' are not value neutral (Timonen, 2008). As noted in Chapter 2, concerns have been expressed about the perceptions created by use of the terminology of 'sheltered' housing and hence the need for an alternative that is not as value laden (Wood, 2013). Descriptions can also reinforce a dichotomised view of older people, by portraying them as being either a burden or a benefit, as deprived or greedy, and as out of touch or wise. Estes (1979) argues that the mere setting of arbitrary age thresholds in policies and eligibility criteria, as is the case for age specific housing, can also have the effect of ghettoising, marginalising, stigmatising and isolating older people from the rest of society. This can also create assumptions about what behaviour or housing provision is or is not considered to be 'age appropriate' (Neugarten, 1996).

Because older people are collectively problematized as a homogeneous group with particular (mostly negative) characteristics associated with declining bodies and decrepitude (Katz, 1996), this creates the frame of reference that then governs the views about what responses and

approaches are considered necessary and appropriate (Lewis et al, 2000). Foucault used the concept of 'government' to refer to the "techniques and procedures for direction of human behaviour" that included the "government of the self" which had the effect of controlling behaviours, intentions and identities in accordance with what is deemed to be socially desirable or appropriate (Rose, 1989, pp4-5). Foucault (1977) was interested in the way domains of knowledge and power became established and drew attention to the often subtle ways in which behaviour of individuals is shaped and guided by the power of professionals to frame the questions posed and the confirmatory nature of the evidence collected to support it (Rose, 1989). Conrad (1992) argued that the way in which welfare providers, professionals and institutions tend to regard all older people as being dependent was being used to justify their intervention and direction. One of the mechanisms and manifestations of the process of governing older people is through the nature and type of housing that is provided and deemed appropriate for older people.

It has thus been suggested that Extra Care and Retirement Housing are corporeally suited for older people because they provide a space in which the physical bodies and mental faculties of older people are allowed to undergo a managed decline in order to avoid difficulties that would otherwise be encountered in mainstream housing (Peace and Johnson, 1998). But, Harper (1997) claimed that as well as being managed, residents in specialised older housing were also being concealed and Bytheway (1982) considered that the design and location of sheltered housing, rather than promoting social integration, often reinforced the marginalisation of older people through their enclosure within social, administrative and spatial boundaries. There are also those who consider that the very notion of specialist housing exclusively for older people reinforces their separateness (e.g. Kontos, 1998).

Specialist housing for older people may thus be a significant factor in creating and reinforcing a mode of governance that shapes the identities of its residents. Although professing to offer independent living, the environments of Extra Care and Retirement Housing could alternatively be interpreted as being controlled by professional managers in order to create a presumption that they are required to make decisions for and on behalf of residents about the organisation of their lives and management of their properties. Living in specialist housing might be seen as an indication that there has been an acceptance of age based expectations of what is considered as appropriate for older people.

Foucault referred to the process by which narratives become internalised into the ways we construct our thoughts and perceptions as 'technologies of the self' (1982). Foucault saw the study of subjective perspectives as critical to the surfacing of these technologies of the self and development of theoretical perspectives able to challenge the dominant representations of

reality (Dreyfus and Rabinow, 1983). Critical gerontology thus used Foucauldian thinking in what Phillipson referred to as the “reconstruction of later life” (Phillipson, 1998, p140) in order to shift the emphasis away from the imposed homogeneity of medical and professional perspectives and towards consideration of the socially constructed nature of old age and the diversity of experiences, influences, attitudes and identities of older people (Hazan, 1994). The aim of this thesis therefore is to expose the social constructions of residents of Extra Care and Retirement Housing so that they can be analysed, compared and contrasted in order to identify and theorise the norms and influences that shape their realities.

### **3D.2 Socially Constructed Perspectives**

The social constructionist position and approach was articulated by Berger and Luckmann (1966) and is seen as originating from the views of symbolic interactionists such as Becker (1963) and Matza (1969). Social constructionism is concerned with understanding the way in which individuals interpret and attach meaning to taken-for-granted social realities. The view that the lives and perspectives of older people should be seen as being socially constructed came to prominence from the late 1970s onwards (Estes, 1979; Phillipson, 1982).

Clapham (2009) echoed previous calls (Jacobs and Manzi, 2000, Jacobs et al, 2004; King, 2004; Fopp, 2008) for housing theory to be developed from a critical and social constructionist perspective that takes account of the experiences and perspectives that people have of the places where they live. There are critics who claim that this can lead to findings of relativist inconsequentiality that lack substance because everything is rendered contingent and hence uncertain. (e.g. Nozick, 2001; Somerville, 2002; Somerville and Bengtsson, 2002). Social constructionism, however, does not deny the existence of an objective world, but merely suggests that this is only effectively understood when mediated through individual subjective experiences (Jacobs and Manzi, 2000; Clapham, 2009). Social constructionism challenges positivistic prescriptions and places a greater value and emphasis on seeking understanding than on defining solutions. It recognises that what is being measured and researched is not an abstract reality, but the outcome and consequence of individuals’ perceptions. The aim of social construction can be seen as “an attempt to find the organising principle for inter-subjectivity” (King, 2004, p42) and to expose the discourse that frames perceptions. Accordingly the intent of this thesis is not to provide answers, but to endeavour to “understand meanings and actions and how people construct them” (Charmaz, 2014, p230) in the context of Extra Care and Retirement Housing.

### **3D.3 Intersectional Perspectives**

Intersectionality refers to the formation of identities from the simultaneous interaction of multiple influences of oppression. Crenshaw (1989) first used the term 'intersectionality' to demonstrate the inadequacy of anti-discrimination laws in addressing the interconnected prejudices faced by black women from lower socio-economic classes. There are those that consider it is a term that should be confined only to contexts involving a racial dimension (e.g. Collins, 1990; Bilge, 2013; Carbado and Gulati, 2013; Jordan-Zachery, 2013) with warnings of the danger of simply 'name checking' intersectionality (Knapp, 2005) and of it becoming a 'citation favourite' (Alexander-Floyd, 2012) used only for 'ornamental purposes' (Bilge, 2011). It is clear that intersectionality cannot simply be attached or applied across disciplines without recognising the racial inequality and injustice that the concept was created to confront (Hancock, 2013 and 2016; Romero, 2018). Intersectionality has, however, evolved and developed into an established field of study (Cho et al, 2013) and been used to consider the multiple inequalities associated with age (Calasanti and King, 2015). Dill and Zambrana (2009) suggested that addressing the diversity within groups was the 'hallmark' of intersectional analysis and May (2015) recognised intersectionality as part of a growing challenge to the hegemony of 'single-axis' thinking. Choo and Ferree (2010, p131), however, emphasised that complexity and factors of intersectionality need to be embedded from the start of any assessment process and could not be simply added on as after thoughts.

As Percival (2001) noted, evaluations of sheltered housing have tended to examine the satisfaction of tenants with separate services or features, rather than exploring the experiences and interactions that occur within these settings. Whilst this is not claiming to be an intersectional thesis, I have taken the prompt from intersectionality to look beyond mono-dimensional theoretical approaches that maintain the established frameworks of perception and recognise that solutions, like the problems they address, may need to be complex, multi-faceted and interdependent.

### **3D.4 Micro, Meso and Macro Perspectives**

The distinction between micro and macro positions and perspectives is a well-established analytical classification (Alexander and Giesen, 1987) evident in many fields of study including physics, engineering, biology and sociology (Turner, 2010; 2016). The separation between 'micro' and 'macro' economics (Frisch, 1933) has become so institutionalised that economists self-identify as either macro-economists, such as Keynes (1937) focused on inflation, employment and international trade, or micro-economists concerned with supply and demand, choices (e.g.

Akerlof, 1970) and behaviours (e.g. Thales and Sunstein, 2008). But, Pawlak (2018, p20) suggests that the micro-macro divide is symbolic of a wider tendency towards the dichotomisation of theoretical and analytical positions (e.g. subjectivism-objectivism, individual-society, and agency-structure).

Prior to the 1980s, the emphasis appeared to have been on separating and distinguishing micro and macro orientations, seeking to prioritise one perspective over the other, instead of looking for linkages and connections between them. Ritzer (1981), however, suggested that rather than being discreet positions, micro and macro perspectives were merely different ends of a continuum, such that one could not be properly understood without the other. Although Ritzer (1990, 2010) has maintained an allegiance to a binary micro-macro continuum model, there has been a growing recognition of the need for consideration of a third 'meso' category. Hage (1980) suggested it was not possible to properly understand organizational process without an understanding of the meso dynamics. Maines (1982) emphasised the importance of the 'mesostructure' and maintained that the meso level should not be regarded as merely an intermediary position connecting the micro and macro ends of an analytical continuum, but as a valuable frame of analysis in its own right.

Bourdieu (1981; 1993; Bourdieu and Wacquant, 1992) used notions of 'social practice' and 'habitus' as means to challenge what was seen to be a false dichotomy between subjective and objective perspectives. The (micro) biographies of individuals were regarded as both being shaped by and as influencing (macro) societal forces, but Bourdieu's concept of 'fields' (1993; Bourdieu and Wacquant, 1992) also made the case for a further (meso) level that mediated between macro social structures and micro individual actors. The ideas of Bourdieu were developed into a 'theory of fields' by Fligstein and McAdam (2011; 2012) with Kluttz and Fligstein (2016) giving specific appreciation of the importance of meso as well as micro and macro level interactions. The essence of the theory of fields is that perspectives and positions are dynamic and formed from the interaction of micro, meso and macro influences with each vying for prominence. DiMaggio and Powell (1983) also considered the effect of 'organizational fields' in creating isomorphic behaviour by firms as a consequence of 'coercive', 'mimetic' and 'normative' influences. Pawlak (2018) has suggested these could be seen as corresponding to pressures at a macro, meso and micro level. Coercive isomorphism is concerned with legitimacy that comes not only from the state but other societal and policy level macro influences. Mimetic isomorphism involves the search for successful models by comparison with others and is thus a meso level process of operational and organizational interaction. Normative isomorphism comes from the sway of professionals but operates as a consequence of their influence and impact on individual attitudes and behaviours at a micro level.

Jaspal et al (2016), however, found little evidence of research that integrated the analysis of micro (individual), meso (group or community) and macro (ideology or population) level perspectives and were concerned that as a consequence only partial explanations would be produced of complex social and psychological phenomena. Solvang et al (2017) sought to address the missing meso gap in rehabilitation and disability research between society's (macro) demands and individual (micro) abilities, but still interpreted the interaction between these perspectives as a hierarchical relationship rather than as a triadic or symbiotic relationship. Medical anthropologists (Krawczyk et al, 2019), however, did use a micro-meso-macro framework to evaluate the effectiveness of standardised patient outcome and experience measures. They considered the differentiated yet interconnected aspects of individual experiences at the micro level, organisational factors at a meso level and system and population perspectives at a macro level and came to the conclusion that the "micro-meso-macro framework can contribute to theoretical development ... and foregrounding the contextual plurality" of health care priorities (p511).

### **Chapter 3 Contribution**

*This chapter has recognised that the difficulty of conceptualising and theorising the dynamics of Extra Care and Retirement Housing services from both a housing and a gerontological perspective might be because both these disciplines are themselves constituted from different paradigms and theoretical traditions. As a consequence views can often appear fragmented, contested and contradictory. It suggests a theoretical framework is needed that can encapsulate and represent the messiness and complexity of multiple perspectives. To achieve this, it proposes that it will be necessary to surface the social constructions of residents in a way that allows them to be analysed, compared and contrasted, but without losing their distinctiveness or the significance of their subjectivity into a single static explanation. It concludes by considering whether a 'micro-meso-macro' perspective might offer the basis for framing the dynamic influences involved.*



## Chapter 4

# The Applicability and Epistemology of Q Methodology

*This chapter considers the nature and suitability of Q methodology to address the challenge of exposing the preferences, positions and priorities associated with Extra Care and Retirement Housing from the perspective of residents. It suggests that Q methodology may help see the issues holistically in a way that preserves the subjectivity of assessments and without necessarily seeking to resolve diverse views into a single solution. Because Q methodology is still not widely applied and recognised in the context of housing and care research it suggests that there is also a case for research that seeks to demonstrate its potential.*

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## **4A: Why Q Methodology**

### **4A.1 Need for a New Approach**

Chapters 1, 2 and 3 set out the aims, context and theoretical basis for this study of the preferences, positions and priorities of residents of Extra Care and Retirement Housing. My challenge was to find an epistemologically appropriate methodology to satisfy the desire to seek new insights that would help to resolve the confused and contested conceptions of those who live in these settings about what they should provide and why they exist.

A definition of insanity (often attributed to Albert Einstein) is doing the same thing over and over again but expecting different results. If we only look at things in a particular way we should not be surprised if we continue to draw the same conclusions. As has already been identified, this thesis has sought to incorporate a degree of epistemological risk taking and methodological innovation in order to gather the subjective assessments of residents and generate a theoretical appreciation of their significance and potential consequences.

From the outset I had identified that Q methodology could provide a potential means to reveal and consider the range of views that are held by residents about Extra Care and Retirement Housing, as I suspected these would be multiple, complex and contested in nature. Q methodology is a method of social constructionism, capable of identifying the predominant viewpoints and knowledge structures extant amongst a selected group of participants relative to a chosen subject matter that allows those views to be studied systematically and holistically (Watts and Stenner, 2012; Watts, 2008). Q methodology is particularly suited to abductive inquiries where speculative rather than conclusive results are seen as providing a sufficient basis for developing theoretical propositions. However, because Q methodology is not widely applied and adopted beyond the community of Q methodologists<sup>14</sup>, this Chapter will consider the nature of Q methodology in order to demonstrate its applicability to address the issues and satisfy the criteria identified in the preceding three Chapters.

### **4A.2 Origins and Opportunities for Q Methodology**

Q methodology was first proposed over 85 years ago by William Stephenson in a letter to the journal *Nature* (Stephenson, 1935) as a means to study subjective views scientifically and objectively. Q methodology did not have an easy reception and Stephenson's ideas were

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<sup>14</sup> The International Society for the Scientific Study of Subjectivity (founded in 1985)

immediately challenged and dismissed as being “at best an interesting novelty” (Brown, 1980, p10) and nothing more than a “normal data matrix ... turned on its side” (Kline, 1994, p78). Stephenson engaged in an epistemological tussle with Sir Cyril Burt, with each setting out their competing and apparently irreconcilable views and differences (Burt and Stephenson, 1939). Criticisms continued during the 1950s led by Raymond Cattell, who sought to discredit Q methodology by associating it with a series of alternative techniques (Cattell, 1951), followed by further criticisms in the 1960s and 1970 based on other alleged but unsubstantiated defects in its statistical underpinnings.

Because of the hostile reception it wasn't until 1953 that Stephenson produced his definitive treatise on Q methodology, 'The Study of Behaviour' (Stephenson, 1953), that envisaged multiple Q sorts being produced by a single individual under different conditions of instruction as a basis for analysis of personality. Stephenson's work was described by his friend and protégé Stephen Brown (1980, p181) as being “astonishing and frequently bewildering”, while Brown's own book 'Political Subjectivity: Applications of Q Methodology in Political Science' (Brown, 1980) is so comprehensive it is regarded more as a bible than a guide.

Whilst much of the acrimony regarding the legitimacy of Q methodology as a tool of psychological analysis was taking place amongst protagonists in the United States, Q methodology was effectively being rediscovered in the United Kingdom in the late 1980s and early 1990s (e.g. Kitzinger, 1987; Stainton-Rogers and Stainton-Rogers, 1990; Curt, 1994) as a general method of social constructionism. It has since been shown that Q methodology can allow views on almost any subject to be studied across a range of participants in order reveal shared or conflicting viewpoints and positions. Q methodology has now been applied in multiple fields and spheres of research in countries throughout the world<sup>15</sup>, and described as being “the best developed approach to the study of human subjectivity” (Dryzek, 1996, p124), but it still remains a relatively niche research method. Practitioners of Q methodology have though been so protective and particular about maintaining its methodological integrity that its adoption has largely been confined to a 'cult of devotees' (Crumley, 1990). However, as has already been noted, Q methodology is not a “quick and easy trick” (van Exel and de Graaf, 2005, p17) and is more than a 'mix and match' technique or process for sorting statements as it presupposes a commitment to a particular 'ology' and mode of application (Stenner, 2008). Even though Watts and Stenner (2012) have now produced a clear and comprehensive guide to the 'Theory, Method and Interpretation of Q Methodology', they emphasise that whilst “it is important the people use Q

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<sup>15</sup> Analysis by Brown et al (2015) found that from 2001-2015 there were on average 92 journal articles published annually that mentioned Q methodology and included titles from the life sciences, health sciences, physical sciences, social sciences and humanities.

methodology ... it is doubly important that they use it well and to full effect” (p21). I have therefore set out in Chapter 5 the rationale for the construction of the Q studies that I have undertaken and sought to provide a critique of the applicability of Q methodology to this research in Chapter 10.

The distinctiveness of Q methodology is that it looks for relationships within and between the views and arrays (referred to as Q Sorts) created by a population of participants (referred to as the P Set) in response to a comprehensive but varied set of stimuli (referred to as the Q Set). These responses can then be subject to systematic and scientific study and compared with other arrays to identify patterns of perspective. This is in contrast with the traditional (R methodology) approach to factor analysis, that involves collecting responses or recording assessments from large numbers of people to look for relationships between their measurements and assessments of a limited set of variables. Q methodology is thus a means to study a population of viewpoints (Risdon et al, 2003) and is concerned with understanding the basis for intra-individual perspectives (McKeown and Thomas, 2013), but it also has its limitations and in particular it does not claim to predict or prove the prevalence of any opinion or preference.

Since Q methodology incorporates both qualitative and quantitative components, some methodologists have sought to position it as a mixed methods technique (Ramlo and Newman, 2011; Ramlo, 2016). However, Q methodology was conceived before the emergence of the mixed methods as a recognised research movement in the 1980s (Fetters, 2016) and does not sit comfortably within the categorisation of the combinations of quantitative and qualitative influences in mixed methods proposed by Tashakkori and Teddlie (2009). Stenner (2011, p201) is clear that Q methodology is one method rather than a mix with its own distinct “ontology in which the ultimate realities are neither subjects nor objects, but actual occasions of experience”. However, this distinct epistemology and insistence on the integrity of the methodological underpinnings of Q Methodology appears to have contributed to its continued position outside of the mainstream of research frameworks and methodologies.

## **4B: Elephant Epistemology of Q Methodology<sup>16</sup>**

### **4B.1 Metaphorical Appreciation**

The metaphor of the fable of the blind people and the elephant was introduced at the end of Chapter 2 as a potential means to consider and reconcile the conflicting and competing views adopted by different studies of specialist housing for older people as part of the quest to consider why it is required, how it should be specified and designed and what benefits it provides. Harries et al (1999) also used the metaphor to suggest complex problems and issues, symbolised by the elephant, could not be adequately understood from just one perspective.

Myths and metaphors should not be dismissed as mere obfuscations or rhetorical embellishments (Cassirer, 1946; Ortony, 1975; Lakoff and Johnson, 1980) and can provide an effective means to guide the interpretation and understanding of ideas through analogical analysis (Nisbet, 1969; Levi-Straus, 1979; Geary, 2011). My intention is to consider the epistemological nature of Q methodology through the metaphor of the story of the encounter between the blind people and an elephant.

### **4B.2 We Are All Blind**

Morgan (1986, p341) recognised that an obvious perspectivist limitation of the metaphor was that “as we look at the plight of the blind men we do so with the privilege of sight” and the reality is that “we are all blind men and women groping to understand the nature of the beast”. No researcher can claim to have the power to see beyond their own senses and experiences in order to be able to conclusively determine how a situation or setting is seen or understood by others. Silverman (1974, p60) dismissed the suggestion that it was possible by continual probing to discover real nature of the elephant, because “there is no neutral ground from which to observe phenomena ‘as they really are’ or to judge the bias of particular accounts”. Holstein and Minkler (2007, p19) said that gerontological research similarly needed to recognise it did not “occupy a value-free realm” and acknowledge “that we all view the world and do our research with a view from somewhere. The view from nowhere, above the fray, does not exist”. As Plank (1932, p217) observed, we “cannot solve the ultimate mystery of nature ... because ... we ourselves are part of nature and therefore part of the mystery that we are trying to solve” and to establish a

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<sup>16</sup> Based on paper presented to ISSSS (International Society for the Scientific Study of Subjectivity) Q Conference in Ancona, Italy 16<sup>th</sup> September 2015 (Moore, 2015)

truth objectively would require the removal of perception itself (Hirsch, 1976). This was also the basis of Pierre Bourdieu's criticism of the 'scholastic fallacy' (Bourdieu, 1998) which held that an 'impartial view' was merely the presentation of an assumed third person's subjective perspective.

The views of a narrator (i.e. researcher) are prone to be as unreliable and dependent upon interpretation as those of the people they observe (Booth, 1961). As only the blind people (i.e. participants) can say what they feel and experience, the role of the researcher should be to analyse the subjective interpretations of the participants rather than seek to impose their own views. Q methodology enables the participants' understandings to be made operant by being expressed and captured in the form of a tangible and analysable arrays. As Q methodology removes the need for researchers to seek to ascertain and recount the views of participants, it reduces the risk of the researcher's own positioned perspectives being imposed under the cover of passive narration and scientific language (Mulkay, 1985; Kitzinger, 1987).

### **4B.3 Substantiating Subjectivity**

The fable also questions the extent to which we can ever fully and completely understand what an elephant is or what it means to be the elephant (to paraphrase Wittgenstein (1953/2001 p190), 'if an elephant could talk, we would not understand'<sup>17</sup>). Rather than trying to use phenomenological techniques or seek to establish the nature of things, Q methodology instead focuses on the interpretations provided by participants. Each Q sort effectively represents that blind person's assessment of the elephant as an expression of their own subjective point of view.

As Brown (1980, p46) confirms, a subjective point of view is not a "trait nor a variable" that a researcher is required to divine as if "a tributary emanating from a subterranean stream of consciousness". Q methodology does not depend upon 'hypothetic-deductivism' (Febbraro, 1995) and avoids the need to infer or assume what participants think or feel and instead allows subjective perspectives to be made operant and capable of being subject to statistical assessment. With Q methodology, the role of the researcher shifts from declaring what each blind person experienced to seeking ways to interpret and make sense of the patterns and relationships within and between the arrays and accounts each participant provides.

The subjectivity of Extra Care or Retirement Housing is not in the setting themselves, but in the assessments and judgements that different people make about them. Extra Care and Retirement Housing settings (like elephants) have an independent objective existence, but their characteristics only gain significance on the basis of the subjective assessments and judgements

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<sup>17</sup> The original reads "if a lion could talk we could not understand him"

that participants (like the blind people) make about their features and facilities. Anaïs Nin (1959) wrote 'we don't see things as they are; we see things as we are' and it is therefore suggested that access to knowledge is best achieved through the accounts that people give based on their own experiences and encounters. Q methodology allows each participant to express their unique point of view by arranging and sorting the set of stimuli provided to create their own distinctive array from a self-referential perspective. It is the arrays, representing the participants' subjective assessments in a substantive form, which can then be subject to objective study and quantitative analysis.

#### **4B.4 Not Just an Inversion of R Factorial Analysis**

Q methodology was initially challenged and dismissed as being little more than an inversion of R factorial analysis (Stephenson, 1936; Burt and Stephenson, 1939; Burt, 1940). But R analysis fractures phenomena into discrete elements, like the separate assessments of the elephant, and disconnects the data from the people that created it. However, without a connection with the person making the assessment, points of view lose their significance and all that can be examined are abstract associations between variables. By linking subjective views with objective analysis, Q methodology does not separate the observer from their observations and so manages to preserve the context and relationship with the people whose viewpoints are being analysed.

The consequences of simply inverting variables can be illustrated in an alternative version of the fable in which six blind elephants start to discuss what humans are like. To find out they decide to find one in order to learn from direct experience. But the first blind elephant ran across a man and then came back declaring they are flat and when the other elephants felt him they also agreed. Heisenberg (1962, p24) drew a moral from this saying that "what we observe is not nature itself, but nature exposed to our method of questioning". This is why it is considered important to be clear about the epistemological basis of Q methodology and the nature of the enquiry it can be used to conduct.

#### **4B.5 More Than the Sum of the Parts**

When the blind people described the element of the elephant they encountered they did so by reference to whole things and distinct objects (i.e. wall, spear, snake, tree, fan and rope). Q methodology challenges the validity of atomistic assessments, where the meaning of each stimulus is considered in isolation, without regard to the context of other concerns and circumstances.



Although each item or statement in a Q set is distinct and requires specific consideration, its significance can only be determined by reference to its position relative to other items and statements within the final array. The consequence of this is that the meaning of any statement ultimately depends on its position compared with the other propositions under consideration, as only in the nexus of a proposition does an object have meaning (Wittgenstein, 1922).

The parts of an elephant have little meaning or significance except as parts of a whole. Gadamer (1989, p291) thus suggested it was necessary to “understand the whole in terms of the detail and the detail in terms of the whole”. Although it is possible to examine different facets and features of Extra Care and Retirement Housing, if we only consider them separately they will not show their significance or contribution to the whole of the service offer.

The metaphor (and Q methodology) thus supports the adoption of a ‘gestalt’ perspective (Ellis and Koffka, 1999) to understand the whole elephant rather than prove (or disprove) any particular element. A completed Q study is more than the sum of its parts and enables comparisons to be made between different Q sorts (created by different participants or under different circumstances) in order to reveal patterns and clusters of understanding.

With Q methodology statements are compared holistically against each other and ordered according to the participant’s own subjective point of view so providing the opportunity to identify and compare preferences against competing statements. The placement of each statement influences the positioning of the other statements so generating a greater understanding of individual attitudes and perspectives. This sets Q methodology apart from the Likert Scale (ten Klooster et al, 2008) and other mechanisms for assessing attitudes, where each response is made independently of the previous statement or question and so does not provide any consistency in the scores or locate an average or mid-point on the scale either between propositions or with the scores of other participants (McKeown and Thomas, 2013).

## **4B.6 Quantum Possibilities**

Bohm (1989) also used the fable of the blind people and the elephant as a basis for understanding wave particle duality in quantum physics. Brown (1992) has suggested that quantum theory and Q methodology apply the same principles and approach to understanding as they both abandon the notion of an objectively knowable world that exists independently of the circumstances or frame of reference for the enquiry being undertaken.

Quantum theory challenges the limitations of Newtonian laws and, by embracing a more contingent perspective questions what is really knowable, enables a wider array of scenarios to

be contemplated. Q methodology similarly provides scope for interpretation and exploration of patterns and possibilities in the plurality of narratives that participants produce. Because Q methodology is not seeking to arbitrate between competing claims of authenticity in order to prove the validity of one view over another by reducing them to a single truth, it can support a more open examination of the influences and methods by which different versions are developed and arrived at.

## **4B.7 Which People, Which Elephant**

With Q methodology the people who produce each of the Q sorts are the variables and it is their subjective assessments that are being studied, hence it is important to have a clear basis for deciding which blind people to select as participants to report on their encounter with an elephant. Although a commitment has been made to consider Extra Care and Retirement Housing from the perspective of residents, the means by which participants were recruited to the P set is considered further in Chapter 5.

Perrow (1974, p11) identified that a further problem with using the metaphor of the blind men and the elephant as a basis for comparing views and perspectives was that sometimes “we are not even looking at the same beast”. Every elephant and every Extra Care or Retirement Housing service is different. As well as the obvious distinction between Indian and African elephants<sup>18</sup> (which perhaps has an equivalence in the differentiation being drawn between Extra Care and Retirement Housing), there will also be variations in appearance, character and disposition that distinguish one elephant from another, or in this study one site location from another.

In order to ensure that all the relevant details and features of the particular ‘elephant’ under consideration have been identified, Q methodology seeks to compile a concourse of all elements of the discourse on the topic under consideration. From this a Q set of provocations are selected in order to provide a heterogeneous representation of the range of potential views and interpretations. Because all participants are required to arrange and rank the same Q set of statements, from their own subjective perspective, this ensures the variety is in their views rather than in the stimuli they encounter. This approach seeks to ensure that it is only the differences in the expectations and experiences of the P set of participants that will influence their subjective interpretations and not differences in the services they have previously encountered.

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<sup>18</sup> *African elephants have wrinkled skin to trap moisture, large ears to cool their bodies, a flat forehead and a trunk with rings all the way down and two fingers at the tip. Indian elephants are smaller, with a rounded back, humped forehead, smaller ear and a smooth trunk with one finger at the tip.*

The encounter that the participants have in a Q study is also not as passive or limited as each blind person's encounter with the elephant appeared to be in the fable. Participants are required to work through the entire Q set of propositions and make choices and express preferences between them. A Q study should force participants to engage with and interpret the materials provided to create a distinctive set of views. This is not intended to be an easy or inconsequential process, because if the stimuli are too vague or generic they may not test and challenge participants to reveal their differences of opinion and preference. The idiom of the 'elephant in the room'<sup>19</sup> is widely used to refer to issues or problems that people are aware of yet seemingly want to avoid and ignore because they are considered to be taboo or too difficult to deal with. It is suggested that a Q study should prompt participants to engage with the elephant and work to decipher and interpret the materials provided to create a distinctive set of views and not simply maintain an easy consensus.

## **4B.8 What Q Can Do**

Q methodology will neither to prove the existence of the elephant nor to define what an elephant is, but what it can do is help to reveal the variety of the accounts that participants (as people blinded by their positions and particular preferences and prejudices) construct.

## **4C: Demonstrating the Applicability of Q Methodology**

### **4C.1 Q Studies for Older People in Housing and Care Settings**

This thesis and my research is not the first Q methodology study to involve older people as participants or to consider their preferences about housing environments or care services. There is nevertheless considered to be merit in continuing to build awareness of Q methodology and demonstrating its potential benefits and applicability within the fields of housing and gerontology.

Critics of Q methodology have suggested the complexity of the sorting task may be beyond the cognitive ability of many people (Bolland, 1985) but, despite the fact that Q studies are not intended to be simple exercises that can be completed without some thought, there is little evidence to support this view. Several studies have been undertaken with young children (e.g. Stephenson, 1980; Brown and Brown, 1981) as well as with older people. An example of Q methodology being used specifically to explore the views of older people was conducted by

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<sup>19</sup> That gained prominence from Terry Kettering's (1989) poem about loss and bereavement

Robinson et al. (2003) who used Q methodology to understand the perceptions of older people about whether examples of stereotyping in the representation of age in magazine advertisements were considered offensive.

Baker et al (2006) proposed that Q methodology could provide a powerful tool in the “methodological armoury” of health economists, the application of which was demonstrated by a Dutch study (Hackert et al, 2019). This considered that a broader and more complex assessment was required in order to understand the views of older people about what constitutes well-being than was provided by measurements of ‘Quality-Adjusted Life Years’ (QALYs) or ‘Health-related Quality of Life’ (HrQoL). It was suggested that because the Adult Social Care Outcomes Toolkit (ASCOT) (Netten et al, 2012) and the ICECAP-O capability measure (Grewal et al, 2006; Coast et al, 2008) focused on discrete aspects of well-being rather than making a holistic assessment they did not appropriately recognise the heterogeneity of older people or appreciate the holistic nature of well-being. Q methodology was thus used to help present the plurality of views in order to guide the development of more person centred assessment measures.

It still remains important, however, for Q methodology to be applied properly with due regard to its methodological and epistemological principles. Despite indicating that it was intending to use Q methodology, a doctoral dissertation (Eldridge, 2010) that considered the needs and preferences of ‘Baby Boomers’ for retirement housing, failed to form the responses from the 20 participants living in a retirement facility to a set of 37 statements into arrays that could be subject to the factor analysis and so lacked the fundamental characteristics or requirements to be classified as Q methodology.

## **4C.2 Different Q Studies for Different Purposes**

Curt (1994) draws a distinction between Q studies considering different types of question and hence has separate chapters considering the typologies of representation (pp134-162), understanding (pp163-184) and conduct (pp185-205). The message given, reinforced by Stainton-Rogers (1995) and Watts and Stenner (2012, pp54-55), is that Q studies should avoid crossing these category boundaries as they each require a separate concourse of statements or questions with characteristics that reflect the particular nature of debate they create.

This study is a study of representations that invites participants to consider and create social representations of how they understand and prioritise the facets, features and experiences associated with Extra Care and Retirement Housing. An act of representation involves showing the understanding of what impression the subject under consideration has on them.

By contrast the study undertaken by Grimshaw et al (2017) used Q methodology to consider the understandings people had of the basis upon which relationships had been formed within an Extra Care setting. Studies of understandings invite participants to signify the meaning of an experience or association to them in a specific context.

The third category is of conduct that is concerned with the potential responses or consequences that participants would propose to a challenge or situation and is thus used to generate solutions to identified issues. Such a study might thus be used to determine how participants might react to changes to the nature or provision of Extra Care or Retirement Housing.

### **4C.3 Different Q Studies for Different Groups**

The study by Grimshaw et al (2017) involved 27 participants (seven residents, five staff members and fifteen other stakeholders including relatives, social workers or providers of ancillary services). Although having a small number of participants is not necessarily a concern for a study using Q methodology, the mixing the different stakeholders in one study may not have given sufficient recognition to or have effectively identified the different perspectives of each of the distinct constituencies involved. As a consequence some of the viewpoints identified were formed only from the perspectives of staff or stakeholder participants and did not include any residents.

Previously Labbé et al (2016) had also combined the sorts of people living with a spinal cord injury with those of their family members in a Q study seeking to understand their housing priorities. Although four perspectives were identified, only one of these had a majority of support from people with a spinal cord injury. As with the study by Grimshaw et al (2017), in this situation it might have been better to have considered the perspectives of both groups separately before trying to make comparisons and understand where the housing priorities and perspectives of people with spinal cord injuries and their families overlapped or differed. Fleming and Kydd (2018), despite considering Q methodology was well suited to establishing, analysing and reporting on viewpoints, attitudes and perceptions of different stakeholders about what makes a nursing home feel 'homely', similarly combined analysis of the perspectives of residents with those of staff and significant others. The result was that the views of four out of the five resident participants were found not to be significant or distinctive for any of the three factors identified and therefore called into question the meaningfulness of the comparisons that involved a view from only one resident.

Watts and Stenner (2012, p54) are clear in their advice that when comparing the views of two or more distinct groups it is necessary appreciate the viewpoints of each group separately before being able to make comparisons and even if the same Q set is used two separate studies will still be needed. Thus when Van Dijk et al (2015) sought to compare the neighbourhood features desired by 'frail' and 'non-frail' older people they deliberately recruited two distinct sets of participants. Each set had 16 people aged 70 but one had people with high levels of frailty and the other with low incidence of frailty, however, the groups were otherwise equivalent in terms of their gender mix, ethnic backgrounds, levels of education and the extent of economic advantage or disadvantage associated with the neighbourhoods in which they lived. Each group of participants was asked to produce arrays from the same Q set of 26 statements, but the sets of results from each cohort were analysed separately and each produced three factors or perspectives. It was only once this analysis had been completed that the results and the two sets of three factors were compared in order to consider the issues over which there were differences of view as well as identifying areas of consensus or connection.

#### **4C.4 Second Order Q Studies**

Ludlow et al (2019) outlined their intention to adopt a similar approach to Van Dijk et al (2015) by conducting separate Q studies for each category of participant in order to gain an understanding the distinct priorities of residents, family members and care staff in an Australian aged care setting using Q methodology. After separately identifying the perspectives or factors for each of the three constituencies of participants they proposed to then perform a 'second-order' factor analysis by taking the factor arrays from the first three sets of analyses and treating these as if they were Q sorts in a new study in order to consider and make comparisons with the priorities of residents, family members and care staff.

Although second-order analysis, whereby the viewpoints identified from initial Q studies are used as inputs for a further Q methodological assessment to find underlying considerations and perspectives, is discussed by Watts and Stenner (2012, p54) and is an established technique in the field of factor analysis (Kline, 1994) it does not appear to be an approach that has thus far been widely used. However, Wong et al (2004) did use second-order Q factors to successfully identify three fundamental concerns for physicians in making care and clinical decisions in end of life cases based on seventeen viewpoints that had been initially been identified from earlier Q methodology studies. There does appear to be merit in considering undertaking this form of second-order analysis in this study to draw out key themes from across the Extra Care and Retirement Housing sites and provide an aggregate (macro) perspective.

## **Chapter 4 Contribution**

*This chapter has considered the epistemological essence of Q methodology and its suitability to conduct a study that is seeking to expose and explore the complexity of multiple perspectives and speculate on their meaning and significance rather than reconcile and reduce opinions into a definitive fixed interpretation or proof. By using a metaphor it has sought to draw out some of the distinctive epistemological features of Q methodology. It considers how Q methodology has been used previously in the fields of housing and care and what distinguishes this study from others as well as emphasising the importance of when using Q methodology to pay due regard to its underpinning epistemological principles.*

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## Chapter 5

# The Elements of the Q Methodological Investigation

*This chapter sets out the elements of the Q methodological investigation undertaken. It demonstrates how the two key components of the Q study (the Q Set of statements that set the scope and parameters for the investigation and the P Set of participants that provide the variables of perspective) were constructed and selected. The processes and practicalities of collecting the data and the approach to its analysis and interpretation are explained in order to give an understanding of the nature of the form of the results that will be obtained and how these will be used, presented and given meaning.*

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## 5A: The Elements of a Q Methodological Study

### 5A.1 Stages of Q Methodology

The practicalities and steps of conducting a Q methodological study (like the instructions for the assembly of flat pack furniture) are best understood when set in the context of an actual study, as demonstrated by van Excel and de Graaf (2005) in their 'Sneak Preview' to Q Methodology. But Watts and Stenner (2005) noted there are still plenty of complexities and considerations that can "muddy the waters of Q methodology" such that "misunderstandings are exceedingly common" even amongst seasoned Q methodologists.

At the most basic level there is though no dispute and hence consistency across all the main guides (e.g. Brown, 1980; van Excel and de Graaf, 2005; Watts and Stenner, 2012; McKeown and Thomas, 2013) about the core components involved in undertaking a Q methodological study. These can be summarised in the following five key stages:

- **Identifying a 'concourse' representing the volume of debate that is refined into a sample 'Q set'.** *These set the scope of the study and are considered in Section 5B of this Chapter.*
- **Selecting participants as the 'P set' who are the variables in the study.** *The approach taken to select participants is addressed in Section 5C of this Chapter.*
- **Administering the 'Q sort' to produce and collect data.** *This is outlined in Section 5D of this Chapter.*
- **Undertaking analysis to find 'Factors' of common perspectives.** *The basis for this is set out in Section 5E of this Chapter.*
- **Analysis, reporting and interpretation to draw conclusions from the results.** *The results from the Q study are set out in Chapters 6, 7 and 8 and subject to interpretation and discussion in Chapter 9.*

## 5B: Compiling a Concourse and Selecting the Q Set

### 5B.1 Criteria for the Concourse and Q Set

The 'concourse' is the collection of all the possible views, perspectives or opinions about the subject in issue and thus represents the 'sum of the communication' (Stephenson, 1978) and 'volume of the debate' (Brown, 1986; 1992). The aim is to expose and incorporate into the concourse the entire repertoire of positions that exist such that "the discourse dictates the sophistication of the concourse" (Brown, 1993, p95).

Phillipson (1998) implored researchers to seek new insights and explanations free from the inherent biases of their own perspectives and tendencies towards social control. In order to achieve this it is common for a concourse of statements to be generated from open-ended survey responses (e.g. Ramlo and Berit, 2013) rather than being derived from the perceived wisdom of existing research.

As it is not practical to try to conduct a Q study with every conceivable statement, the concourse must be refined into a representative sample of statements, referred to as the Q Set. It is important for the statements in the Q Set to cover the entire territory of the concourse and reflect the complexity and detail of the full spectrum of views, as it is the comprehensiveness of the statements that are sorted rather than the number and selection of participants that determines the representativeness of a Q study. Although the formation of the Q Set from the statements in the concourse is said to be of the 'utmost importance', it is also acknowledged to be "more an art than a science" (Brown, 1980, p186) and recognised that "there is no standard Q sample for a concourse" (Brown, 1986, p73).

The selection of statements from the concourse can be done on either a structured basis, according to predetermined categories or criteria, or be unstructured allowing more flexibility in the sampling process (McKeown and Thomas, 2013; Watts and Stenner, 2012). The structured approach breaks down the field of study into a set of themes or issues and then seeks to select statements to achieve a balanced representation of each within the Q Set, which is in accordance with Fisher's (1960) principles of a 'balanced-block' approach to experimental design. Concerns that this structuring could skew the outcome of a study were said to be 'spurious' (Brown, 1980, p189) as it is the participants who give meaning to the statements by sorting so they ultimately decide how they are arranged irrespective of the means used by the researcher to determine which facets of the concourse are included in the Q Set. An unstructured approach does not imply there is no structure or coherence to the Q Set that is constructed, merely that its development is based on an appreciation of the subject setting as a whole rather than in accordance with a set sampling structure. Irrespective of the approach that is taken the aim should be to "cover all the ground smoothly and effectively without overlap, unnecessary repetition or redundancy" (Watts and Stenner, 2012, p59). Watts (2008) used the analogy of statements as carpet tiles needing to efficiently cover all the ground within the relevant conceptual space, leaving no gaps but minimising overlaps.

Statements should ideally also be as heterogeneous as possible and seek to capture "the full gamut of possible opinion and perspective" (Watts and Stenner, 2012, p58), but that does not imply that they need to achieve an equal balance of positive and negative responses. Advice from Brown (1980, p190) is to present statements in the "natural" form in which they were

originally expressed. Although Watts and Stenner (2012, p62) suggest some modification may be required to avoid complex and compound propositions, it is recommended that such changes should be “more akin to cosmetics than to plastic surgery” Brown (1980, p200). Brown (1980, p190) also suggests it is important for statements to ‘evoke a response’, but Stainton Rogers (1995) and Thomas and Baas (1992) are confident that, no matter how the statements are constructed or presented, participants will generally find a way to give them meaning.

There is no fixed view about the number of statements that should be included in a Q Set, but too many will make the sorting process time consuming and unwieldy, while too few risks creating a sample that is over narrow and not sufficiently comprehensive in order to identify all the issues of significance. Brown (1980, p200) suggests that Q sets exceeding 60 items are rarely required.

## **5B.2 Creating a Concourse from a Survey of Residents**

The issues and aspects of Retirement Housing and Extra Care to be included within the scope of my study were derived from responses obtained to a survey sent out in July 2017<sup>20</sup> to 812 residents of Housing 21. These were residents who had attended resident engagement events in the preceding 12 months or otherwise indicated that they wanted to be involved and to have the opportunity to give their views (which included residents who had made complaints). The survey was sent by email to 243 residents for whom Housing 21 had an email address and the local court managers were requested to provide the remaining 569 residents with a paper version and a pre-paid return envelope.

The survey was qualitative and asked just five open questions:

- **What do you think are the best things about living in Retirement Housing/Extra Care?**
- **What do you like least about living in Retirement Housing/Extra Care?**
- **What do you think Housing 21 should do that it is not currently doing?**
- **What are the things Housing 21 should ensure it continues to do?**
- **What do you think that Housing 21 should stop doing?**

96 email responses (40% response rate) and 77 paper returns (14% response rate) were received giving a total of 173 responses and an overall response rate of 21%. The response rate was not considered to be too low as the survey was conducted without any promotion, no checks were made to ensure that paper versions had been delivered and no prompts were sent to encourage completion and some of the residents on the database were also couples who may have provided only one joint response.

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<sup>20</sup> This was undertaken in contemplation of conducting this Q study project, but in advance of my formal enrolment as a PhD research student

Responses were anonymous, but participants were invited to indicate their gender, age and whether they were residents of Extra Care or Retirement Housing. 146 (83%) of the 173 responses were from residents of Retirement Housing and 27 (17%) from Extra Care residents. 89 (61%) of the 146 Retirement Housing responses were from female residents compared with an overall proportion of female residents of 57% in Housing 21's Retirement Housing. 21 (78%) of the 27 Extra Care responses were from female residents compared with an overall proportion of female residents of 62% in Housing 21's Extra Care properties. There were no responses from any residents aged under 55 or over 95.

The response rate and the profile of the participants, however, was not of particular significance as the survey was not seeking to establish the prevalence of any particular point of view or achieve a statistically representative or reliable sample from the entire resident population. The aim was simply to collect a cross-section of views and opinions in order to gain an insight into the spectrum of issues that were considered to be significant from a residents' perspective.

A total of 952 statements of opinion and preference were extracted from the comments made in response to these prompts and thus provided a substantial concourse of issues for consideration. The responses to the survey are shown in Appendix 1 with the extracted statement highlighted in yellow.

### **5B.3 Categorising and Condensing the Concourse into a Q Set**

I sought to group together duplicate and similar statements and use these groupings to categorise the concourse of statements into sets of issues and concerns that captured the essence of the comments made whilst still respecting the plurality of opinions and maintaining a comprehensive spectrum of views. This was done without a formal structure but intuitively based on similarities in the themes and issues raised by the statements. This led to identification of 36 categories of comments that were considered to be applicable to both Retirement Housing and Extra Care plus 2 additional categories specifically for Extra Care. Within some categories more than one statement was considered to be required to capture the different aspects or understanding of an issue as evidenced by the nature of the statements in the concourse. The initial Q Set of 48 statements for Retirement Housing and 50 statements for Extra Care are shown in Appendix 2 with an indication of how many of the survey responses were linked with each theme or statement.

## **5B.4 Piloting the Statements**

The initial Q Sets of 48 statements for Retirement Housing and 50 statements for Extra Care were tested in a pilot study involving eleven Retirement Housing residents, two Extra Care residents and two Housing 21 managers. None of the residents involved in the pilot study had completed the initial survey and they were not residents from any of the sites selected for the main Q study.

The primary aim of the piloting process was to test the statements for clarity of expression (i.e. that the wording was clear and easily understood) and check on the comprehensiveness of the study (i.e. that no issue of significance had been missed). The pilot study also prompted some general learning points about the practicalities and logistics of conducting the study including the size and design of the grid that the statements needed to be positioned within and the format of the cards on which the statements were printed.

Participants in the pilot study were asked to comment on the suitability and way in which the statements were expressed and were also questioned about whether they felt there was anything missing from the scope of the study. As a result of feedback from the pilot study some relatively minor revisions and changes were made to the wording of 12 of the statements. The participants in the pilot study also identified the practice of the communal lounges being taken over for use by non-residents and the provision and use of guest rooms as issues of potential interest for both Retirement Housing and Extra Care. The necessity for assisted bathing facilities and the use of on-site hairdressing salons were also raised as issues of specific relevance to Extra Care. It appeared that residents in the pilot study were able to cope with the quantum of statements without any significant difficulty, so a decision was made to include additional statements (2 general statements applicable to both Retirement Housing and Extra Care and 2 statements specific to Extra Care only) to address these features and aspects of the service identified by the pilot study that had not been picked up in the initial concourse of statements. The original wording of the statements in the Q-Set and the revised version of the Q-Set statements adopted after the pilot survey are shown in Appendix 3.

## **5B.5 Substantiating the Statements**

Because of the abductive intent of this thesis, the statements in the concourse and Q-Set were not constructed 'top-down' by reference to pre-existing literature and guides, but developed 'bottom-up' by asking residents to give their views and opinions, free from the constraints of prior expectations. This approach gives the statements and issues identified an obvious legitimacy, but it does also run the risk that it might give prominence to matters that could be considered to be frivolous or of marginal importance. Even though this is not a real risk, since the issues

originated from comments made by residents and it is the participants who ultimately determine the significance and meaningfulness of any statement, a review of the literature associated with each of the themes and statements was undertaken to provide a degree of familiarity with some of the issues and prior consideration of the issues identified and to assess whether they were likely to be matters of genuine interest.

A summary of the literature and debate pertaining to the entire set of statements is provided in Appendix 4. This assessment is only included as an Appendix rather than in the main body of this thesis because it did not directly influence which statements were selected for the study or how they were expressed. Although only intended as a check that the statements were likely to be issues of substantive concern or importance that could contribute to an understanding of the preferences and perspectives of residents with regard to either Extra Care or Retirement Housing, this does nevertheless provide a valuable resource that identifies a number of specific issues and features of specialised housing for older people that might benefit from separate and subsequent specific attention. These considerations will also be referenced and incorporated, where relevant, into the discussion of the findings from the Q studies undertaken in Chapter 9 in order to consider whether these challenge or corroborate the conventional wisdom.

The aim and purpose of the Q methodology is to look for meaning and insights within the patterns of perspective and preference amongst the participants rather than necessarily seeking to validate the legitimacy of the stimuli they are presented with. This review, however, did serve to demonstrate that all the statements generated from the survey appeared to have merit and justification for inclusion within the Q-Set because of their contribution in raising matters where there are differences of position and opinion about the extent or nature of the views, expectations and preferences for Extra Care and Retirement Housing. It also suggests that the statements would be sufficient to express and expose some of the enduring disputes and differences of disposition and orientation that are associated with the alternative perspectives and interpretations of specialist housing for older people suggested in Section 2C above.

I ensured that all the statements were 'representations and descriptions' of the Extra Care and Retirement Housing 'offer' in order to prompt participants to consider how these correspond to their own subjective preferences and priorities. But, following the advice of Curt (1994) and Watts and Stenner (2012, p55) (considered above in section 4C.2), the study did not also include experiential statements of 'understandings' or propositions for future 'conduct'.

Even though the identification of categories within the concourse and selection of statements to form the Q-Set was undertaken without reference to a pre-determined structure or framework, I did subsequently consider how they might also be capable of being grouped into nine potential



domains or themes and how these were balanced and distributed across the conceptual territory defined by the dimensions or axes of 'People'↔'Property' and 'Individual'↔'Communal' as shown listed below and illustrated in Figure 5B.1.

### **RE-ASSURANCE (Supported, Safe and Secure)**

- #1 A court manager to turn to if you need help and advice
- #2 A resident manager or warden who lives on-site
- #3 A court manager who is only employed on a part-time basis
- #48 Good staff who provide consistency of service
- #51 **Care staff on-site 24 hours 7 days a week if needed (EC)**
- #17 Feeling safe and secure
- #10 Peace of mind that comes from being looked after
- #14 Having security of tenure
- #42 Checks on fire, electrical, gas, asbestos and water safety
- #21 Pull-cord or pendant to summon help in an emergency
- #5 No need to worry about maintenance and repairs
- #6 Repairs or problems are addressed and fixed quickly

### **AUTONOMY (Choice and Control)**

- #26 Being seen as a form of care home
- #31 Residents are treated with dignity and respect
- #27 Freedom to live as you choose: no requirement to join in or conform
- #28 Independent living
- #29 Able to have your say and raise matters with senior management
- #30 Residents are engaged and able to exercise choice and control
- #43 Everyone is kept informed and up to date about local plans and activities
- #44 Information about costs and charges is correct, clear and comprehensive

### **TOGETHERNESS (Community Compatibility)**

- #8 Companionship of neighbours so you are never lonely
- #19 Social events and activities to get involved in
- #23 Community spirit and friendship with people of similar age and outlook
- #37 Living in close proximity to others in a compact community
- #32 Some other residents behave badly
- #33 Residents who take control and assume responsibility for organising things
- #34 People don't respect privacy or confidentiality
- #35 Gossip spreads quickly
- #11 Living around people of a similar age and outlook
- #12 Occupancy restricted to only retired people aged over 65
- #36 Residents with dementia or who need to be looked after
- #13 Residents are able to have dogs, cats or other pets

### **ACCESSIBILITY**

- #45 Wide doors, that are easy to open, for people with reduced mobility
- #46 A reliable lift
- #47 A suitable storage area for buggies and other large items
- #54 **An accessible bath for those that want or need it (EC)**

## PERSONAL SPACE

- #24 You have your own home with your own front door
- #38 Small flats

## FEATURES AND AMENITIES

- #16 An effective and efficient heating and hot water system
- #18 A garden or balcony so you can sit out in private
- #20 Availability of a good internet connection and/or wifi

## MODERNITY

- #39 Properties and facilities that are modern and well designed
- #41 Contemporary kitchens and bathrooms

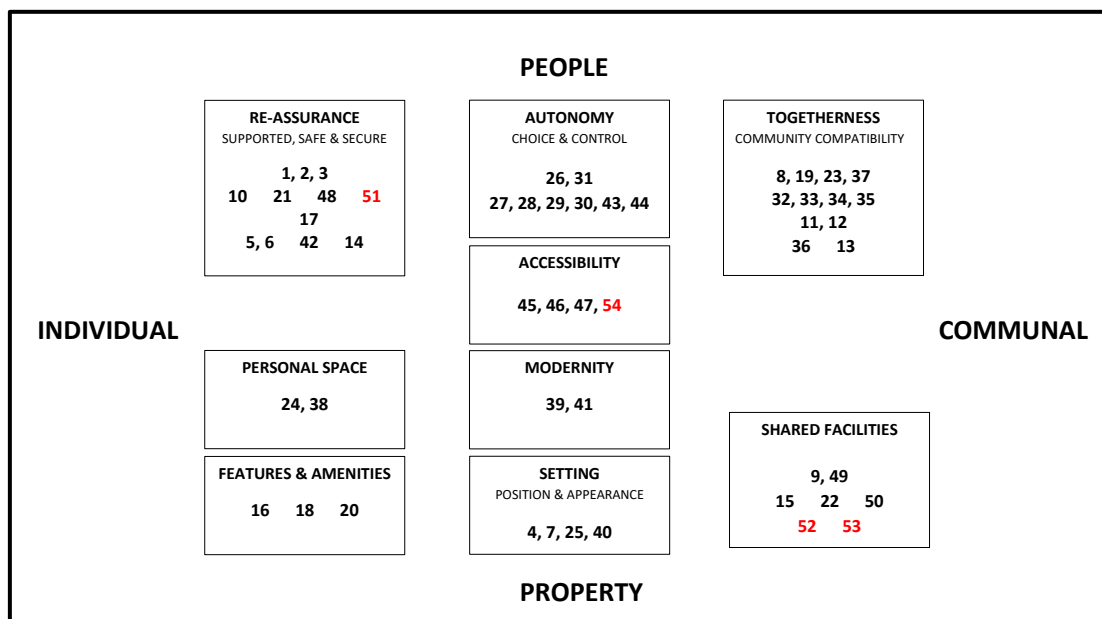
## SETTING (Location and Appearance)

- #4 Close to shops, amenities and transport
- #7 The appearance of the Court creates a good impression
- #25 In a nice area with attractive surroundings
- #40 Buildings and gardens are kept clean and tidy

## SHARED FACILITIES

- #9 Use of a communal lounge and other shared facilities
- #49 Common lounge used by external organisations and groups
- #15 A communal laundry room with washers and dryers
- #22 Sufficient car parking spaces
- #50 Guest room available for visitors
- #52 An on-site restaurant (EC)
- #53 Hairdressing salon on-site (EC)

Figure 5B.1: Mapping the Q-Set Statements across the territory defined by the axes of 'People'-'Property' and 'Individual'-'Communal'.



Despite the difference in the number of statements in each domain there does appear to be a reasonable spread of statements across the dimensions of 'People' ↔ 'Property' and 'Individual' ↔ 'Community'. It is emphasised, however, that these domains and dimensions have only been suggested as a potential constructs after the statements had all been extracted from the responses provided to the survey undertaken and there was no predetermined theoretical stance. The extent to which that these axes of emphasis may be judged to be relevant or meaningful can only be assessed *a posteriori* through interpretation and analysis of arrays produced by participants rather than through *a priori* postulation (Brown, 1980, p54). These issues will though be considered as part of the comparison and assessment of different patterns of preference between Extra Care and Retirement Housing in Section 8A.4 as well as in the discussion and conclusions in Chapters 9 and 10.

## **5C: Seeking Perspectives from P Sets of Participants**

### **5C.1 Participants as Study Variables**

In a Q study, while the Q Set of statements represents the population of views (i.e. the concourse) under consideration, it is the population of participants (collectively referred to as the P Set) who, by giving their different perspectives and interpretations on the topic under consideration, create the variables. Q methodology seeks to understand, explicate and compare the relationships between the variables, in the form of the arrays produced by each participant, by seeking to establish the basis for shared viewpoints (often referred to as factors) within and amongst the participants. The expectation, derived from Keynes' (1921) principle of 'limited independent variety', is that there will be a 'finite diversity' (Stainton Rogers, 1995) in the range of views and positions that people will adopt with regard to a given subject or situation. The aim of Q methodology is to collect and explore these shared perspectives (Cross, 2004, p209).

Because Q methodology does not profess to establish the prevalence of a particular point of view or determine what proportion of people will be aligned to different factors, only a limited sample of participants will normally be needed to reach a position of 'data saturation' (Glaser and Strauss, 1967). As Brown (1980, p192) points out "all that is required are enough subjects to establish the existence of a factor" and ensure that all relevant viewpoints are revealed. To illustrate this Brown (1980, p194) quotes Benedict's (1946, p16) observation that in considering the customs and greetings of Japan, "one quickly reaches the point where the testimony of great numbers of additional informants provides no further validation".

The reliance of Q methodology on only a limited number of participants is in marked contrast to traditional survey studies that require large numbers of responses in order for the results to be considered representative and generalizable. It has been proposed that the number of people in the P Set of participants should be smaller than the number of statements or objects in the Q Set (Brouwer, 1999) and Kline (1994) also suggests that since conventional (R methodological) factor analysis studies are expected to have at least twice as many participants as there are variables, in Q methodological studies there should be at least twice as many statements as there are participants. Even though Watts and Stenner (2012) did not accept that there is any statistical logic support to the positions of Brouwer or Kline, they did nevertheless indicate that having large numbers of participants in a Q methodological study could be problematic and had the potential to negate some the subtle nuances, complexities and distinctions that could be discovered with a more select sample of participants (Watts and Stenner, 2005). They recognised, however, that because researchers do not necessarily know how many factors there are going to be in a study or which participants are going to produce arrays that are distinctive of a particular factor, there is a natural temptation and tendency to 'over sample' (Watts and Stenner, 2012).

Since each participant in a Q study produces a variable it is clearly important and desirable to try and select people whose viewpoints matter. Brown (1980, p192) suggests that a P Set should be selected on a basis that is more "theoretical ... or dimensional ... than random or accidental". In some cases, this can involve the purposive selection of participants who belong to a certain group or category and in others it will involve strategic sampling to gather responses from participants across a spectrum of circumstances and characteristics in the expectation that they will present a mix of distinct points of view. Although demographic diversity may provide an indication of the breadth of a sample of participants, this alone does not guarantee a difference in their outlook. The sampling and recruitment of participants may, however, need to be extensive and opportunistic if there are limitations on the ability to effectively locate and select a set of participants who are known to be characteristic of different views and opinions related to the research question or issue under consideration. As Duay and Bryan (2006) and Hilton et al (2009) point out, it is not unusual to be limited to a 'population of convenience' when conducting research with ageing adults.

## **5C.2 Selecting a P Set of Resident Participants**

Although resident participants for this study were opportunistically recruited from people living in Housing 21's Extra Care and Retirement Housing properties, efforts were made to encourage as heterogeneous a mix of residents as possible to put themselves forward and thereby establish

a diverse set of participants willing to express their particular points of view. To help create a diversity of participants they were recruited from a range of different Extra Care and Retirement Housing sites with different settings and characteristics.

As people living in different areas are often said to demonstrate particular local or regional characteristics (Rentfrow et al, 2015) the sites were identified for studies to be undertaken and participants recruitment were located in different regions of England. In order to increase scope for diversity of outlook I also sought to recruit participants from a mix of Extra Care and Retirement Housing sites that varied in their setting (rural, town, urban or city), demographic context (% of population over 65), extent of alternative provision of equivalent specialist housing in the area, the scale and character of the offer in terms of the total numbers of properties, age of construction, size of properties, tenure and service propositions and the nature and extent of the facilities provided. Studies were undertaken at 5 Extra Care sites (1-5) and 11 Retirement Housing sites (A-K). The locations of these sites is shown on the map in Figure 5C.1.

**Figure 5C.1: Map Showing Location of Study Sites (Retirement Housing A-K, Extra Care 1-5)**



Summary descriptions of the five Extra Care and eleven Retirement Housing sites are provided below, but with further details of the context and characteristics of each of the study sites, together with additional demographic information on the profile of the resident participants, provided in Appendix 5.

- **Extra Care Sites**

**Site 1**

A relatively small (38 property) rural Suffolk Extra Care scheme built in 2004. It is in an area with (7%) over the national average of people aged over retirement age. It has mainly (30/38) large 1 bedroom properties suitable for 2 people and a few (8/38) 2 bedroom properties – all for social rent. A high level of care is provided (over 10 hours per resident per week on average) by Housing 21's own care staff (rated as outstanding by the Care Quality Commission).

15 residents from Site 1 (39%) participated in the study<sup>21</sup>.

**Site 2**

A typical but larger sized (80 property) Extra Care scheme in a naval city built in 2015. It is in an area with (5%) under the national average of people aged over retirement age but with a relatively high provision of Extra Care accommodation. It has a majority (61/80) of large 1 bedroom properties suitable for 2 people and a minority (19/80) 2 bedroom properties – all for affordable rent. The care services are provided by a third party provider.

9 residents from Site 2 (11%) participated in the study.

**Site 3**

A typical but smaller (60 property) Extra Care scheme in a Cotswold market town built in 2011. It is in an area with (6%) over the national average of people aged over retirement age. It has a minority (20/60) of large 1 bedroom properties suitable for 2 people and a majority (40/60) 2 bedroom properties – all for affordable rent. The average care services provision of 8.3 hours per week per resident is fairly typical for Housing 21's Extra Care and provided by Housing 21's own care staff.

14 residents from Site 3 (17%) participated in the study.

**Site 4**

A typical standard sized (70 property) Extra Care scheme in an East Midlands market town built in 2016. It is in an area with (2%) over the national average of people aged over retirement age. All its properties have 2 bedrooms – all for affordable rent. The average care services provision of 8.5 hours per week per resident is fairly typical for Housing 21's Extra Care and provided by Housing 21's own care staff.

9 residents from Site 4 (13%) participated in the study.

**Site 5**

A larger than usual (130 property) Extra Care scheme in an urban area of the North East built in 2016. It is in an area that matches the national average of people aged over retirement age (19%). Over half the properties are 2 bedroom flats, but there are also two bedroom bungalows (23%) and some larger one bedroom properties suitable for 2 people (24%) - 45% of the properties are available for purchase on a shared ownership basis and 55% for affordable

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<sup>21</sup> Percentage participation is based on number of participants as a proportion of the number of properties so this will be an over representation of the level of engagement where there are couples living in some properties.

rent. The average care services provision is under 7 hours per resident per week and lower than the norm for Housing 21 but is provided by Housing 21's own care staff.

21 residents from Site 5 (16%) participated in the study.

- **Retirement Housing Sites**

**Site A**

A relatively small (27 property) Retirement Housing scheme in rural Norfolk Broads, built in 1976. It had new kitchens installed in 2007 and new bathrooms in 2013 and has communal oil central heating. It is in an area with (13%) above the national average of people aged over retirement age. 40% of the properties are studios (5) or small 1 bedroom 1 person flats (6) – all for social rent. There is a part-time Court Manager. The property has 2 storeys and has a lift.

10 residents from Site A (37%) participated in the study.

**Site B**

A large (43 property) Retirement Housing scheme in an East Anglian city location, built in 1979. It had new kitchens installed in 2007 and new bathrooms in 2015 and has communal gas central heating. It is in an area with (4%) under the national average of people aged over retirement age. 32% of the properties are studios, 65% are large 1 bedroom properties suitable for 2 people and there is one larger former manager's property – all for social rent. There is a full-time Court Manager and a part-time assistant Court Manager. The property has 2 storeys but no lift.

18 residents from Site B (42%) participated in the study.

**Site C**

A relatively small (27 property) Retirement Housing scheme in an East Anglian city location, built in 1973. It had new kitchens installed in 2000 and new bathrooms in 2013 and has communal gas central heating. It is in an area with (7%) under the national average of people aged over retirement age. 33% of the properties are studios, 59% are large 1 bedroom properties suitable for 2 people and there are two 2 bedroom properties – all for social rent. There is a part-time Court Manager. The property has 2 storeys but no lift.

9 residents from Site C (33%) participated in the study.

**Site D**

A large (49 property) Retirement Housing scheme in a port town on the South East, built in 1982. It had new kitchens and bathrooms installed in 2015 as well as general make-over and has communal gas central heating. It is in an area with (4%) over the national average of people aged over retirement age. 31% of the properties are studios (15) plus one small 1 bedroom 1 person flat, 63% are large 1 bedroom properties suitable for 2 people and there are two larger former managers' properties – all for social rent. There is a full-time Court Manager. The property has 3 storeys and a lift.

16 residents from Site D (33%) participated in the study.

**Site E**

A medium sized (30 property) Retirement Housing scheme in a port town on the South East, built in 1973. It had new kitchens installed in 2003 and new bathrooms in 2009 and has electric storage heaters. It is in an area with (5%) over the national average of people aged over retirement age. 47% of the properties are studios and 53% are larger 1 bedroom

properties suitable for 2 people. There is a full-time Court Manager who also lives in accommodation on the site. The property has 2 storeys and a lift.

9 residents from Site E (30%) participated in the study.

#### **Site F**

A large (43 property) Retirement Housing scheme in a seaside town in the South West, built in 1978. It had new kitchens installed in 2006 and new bathrooms in 2009 and has electric storage heaters. It is in an area with (11%) over the national average of people aged over retirement age. 40% of the properties are studios (7) or small 1 person 1 bedroom flats (10) with 60% larger 1 bedroom properties suitable for 2 people. There is a full-time Court Manager who also lives in accommodation on the site. The property has 2 storeys but no lift.

21 residents from Site F (49%) participated in the study.

#### **Site G**

A medium sized (33 property) Retirement Housing scheme in an a large Cotswold market town, built in 1978. It had new kitchens installed in 2001 and new bathrooms in 2010 and has electric storage heaters. It is in an area that matches the national average of people aged over retirement age (19%). 36% of the properties are studios (8) or small 1 person 1 bedroom flats (4), 55% are large 1 bedroom properties suitable for 2 people and there is two 2 bedroom properties – all for social rent. There is a full-time Court Manager. The property has 2 storeys but no lift.

13 residents from Site G (39%) participated in the study.

#### **Site H**

A very large (86 property) Retirement Housing scheme in urban West Midlands, built in 1984. It had new kitchens and bathrooms installed in 2016 as well as a general make-over and has communal gas central heating. It is in an area with (1%) over the national average of people aged over retirement age. 42% of the properties are studios (20) or small 1 bedroom 1 person flats (18), 52% are large 1 bedroom properties suitable for 2 people and there is three larger 2 bedroom properties – all for social rent. There is a full-time Court Manager plus a full-time assistant Court Manager. The property has 3 storeys and one lift.

14 residents from Site H (16%) participated in the study.

#### **Site I**

A small (24 property) Retirement Housing scheme in an East Midlands market town, built in 1973. It had new kitchens installed in 2003 and new bathrooms in 2009 and properties have individual gas heating. It is in an area with (3%) over the national average of people aged over retirement age. 83% of the properties are studios and the others are small 1 bedroom 1 person flats – all for social rent. There is a part-time Court Manager. The property has 3 storeys and a lift.

10 residents from Site I (42%) participated in the study.

#### **Site J**

A very large (67 property) Retirement Housing scheme in a West Yorkshire urban area, built in 1976. It had new kitchens installed in 2000 and new bathrooms in 2009 and has communal gas central heating. It is in an area with (2%) under the national average of people aged over retirement age. 9% of the properties are studios and 91% are large 1 bedroom properties suitable for 2 people – all for social rent. There is a full-time Court Manager. The property has 3 storeys and a lift.

24 residents from Site J (36%) participated in the study.



### **Site K**

A medium sized (30 property) Retirement Housing scheme in Northumbrian market town, built in 1983. It had new kitchens installed in 2013 and new bathrooms in 2010 and has communal gas central heating. It is in an area with (5%) over the national average of people aged over retirement age. The majority (63%) of the properties small 1 bedroom 1 person flats and the others are larger 1 bedroom properties plus a 2 bedroom former manager's property – all for social rent. There is a part-time Court Manager. The property has 2 storeys but no lift.

13 residents from Site K (43%) participated in the study.

Although the participants at each site were recruited on an opportunistic basis, a check was made to assess the extent to which the combined P Sets for Extra Care and Retirement Housing reflected the mix and diversity of residents across the specific sites selected as well as the overall profile of residents in that type of accommodation in Housing 21. This assessment was based on the age profile, length of residence, gender and whether the participant lived alone or with a partner.

### **5C.3 Ethics of Participation**

It is essential that any research is conducted with integrity and in an ethical manner. Ethical issues were formally addressed by obtaining ethical approval to my research proposals at the outset. Ethical approval was given by University of Sheffield School of Health and Related Research (Reference Number 019090) on 31<sup>st</sup> May 2018. A copy of the ethical approval letter and supporting documents (Participant Information Sheet, Participant Consent Forms, Instructions for Q Methodology Sorting) are provided as Appendix 6.

Ethical considerations guided my actions throughout the research process as this progressed from collection of data, to interpretation and on to drawing conclusions and dissemination of findings. A former Chief Scientific Advisor, Sir David King (King, 2007), summarised research ethics as requiring a combination of Rigour, Respect and Responsibility.

- **Rigorous**

The rigour of research depends upon adopting a methodology appropriate for the investigation being undertaken and applying it skilfully in accordance with accepted standards and safeguards. I have set out my reasons choosing to use Q methodology and demonstrated my appreciation of the need for rigour in its application in Chapter 4. A particular “attraction of Q method ... is its transfer to participants of at least some of the power to define what constitutes the stories being told” (Curt, 1994, p26). Q methodology enables each participant to create and present their own unique subjective point of view in the form of a tangible array which can be subject to objective

study without damaging the potency of the views expressed (Risdon et al, 2003; McKeon and Thomas, 2013).

Before undertaking the research I ensured I had an up to date enhanced Disclosure and Barring Service (DBS) check certificate that permitted me to have unsupervised access to older people that are considered 'vulnerable'. All adults living in sheltered housing were previously automatically classified as being 'vulnerable', but since the merger of the Criminal Records Bureau and the Independent Safeguarding Authority as the Disclosure and Barring Service under the Protection of Freedoms Act 2012, the definition of a vulnerable adult is now linked to the person's dependence upon care, support or assistance. As I was seeking to engage a diverse range of residents as participants a DBS certificate was necessary as it was likely that at least some of the participants would have been considered to be 'vulnerable adults'.

- **Respectful**

All older people, whether or not they are deemed to be vulnerable, are entitled to be treated with respect and this should start with a presumption that they are autonomous and able to make decisions and determine whether they want to participate in research. Velzke and Baumann (2017) suggest that calls for greater engagement and empowerment of older people in gerontological research (Phillipson and Walker, 1987; Wahl et al, 2010; Wahl and Weiseman, 2002) too often went unanswered because older people are assumed to lack capacity to make a meaningful contribution. Although I sought to avoid recruiting residents where there was any doubt about their ability to understand the nature of the research being undertaken or capacity to give informed consent, I started with a presumption of competence, as people with mild or even moderate dementia may still be capable of giving informed consent (Buckles et al, 2003; Terson and Wallin, 2003; Warner et al, 2008). The views of relatives or professionals are not considered to be acceptable surrogates for the opinions of older people, but I considered it appropriate to also engage with family members and support staff who could help residents understand the nature of the research being undertaken and so decide if they wished to participate. Even though residents of Retirement Housing and Extra Care are considered to have the capacity for 'independent living', I was guided by the advice and assistance of local staff at each of the research sites in order to avoid causing distress or embarrassment by seeking to engage residents for whom understanding and providing consent could have been problematic.

Ensuring that participants gave informed consent was considered to be a fundamental requirement to show respect and gain assurance that they were fully aware of the nature of the study being undertaken and of any risks or potential consequences of involvement. Obtaining informed consent is essential in order to ensure the engagement and understanding of participants regarding the nature and reasons for the research being undertaken. To ensure

informed consent was obtained, I sent the local manager for each intended research site multiple copies of a Participant Information Sheet, Participant Consent Form and Instructions for Q Methodology Sorting before the intended date for visiting the site so these could be distributed to potential participants and considered in advance. The Participant Information Sheet provided a synopsis of the nature of the study I was intend to undertake, the Instructions for Q Methodology Sorting gave a description of the procedure for gathering data via a Q sorting process and the Participant Consent Form acted as a checklist of the requirements for informed consent. I discussed these documents with each potential participant prior to undertaking a study. I asked participants to sign or initial each paragraph of the Participant Consent Form to indicate that they understood it and they were also given a copy of the signed document.

It is an essential aspect of giving informed consent that participants have the ability to freely decide whether or not they wish to participate and should not feel under any pressure or coercion to do so. Because I was recruiting residents (as well as staff and stakeholders) of Housing 21 as participants, I had to be especially mindful to ensure that my position as Chief Executive of Housing 21 did not create an inference or impression that participants were being compelled to take part in the study. To try to overcome this I emphasised that the research was being undertaken in my capacity as a PhD student and I made it clear that the decision to participate or not was entirely voluntary and that no special treatment or consequences would ensue either to those who did or did not take part. I also confirmed to participants that whilst, as Chief Executive of Housing 21, I was willing to hear any complaints, compliments or comments, the data provided as part of the research process would only be used for my research project.

- **Responsible**

There is a responsibility in undertaking research to not only respect human participants by protecting them from harm (non-maleficence) but also by identifying the benefits the research will bring (beneficence). I did not consider it was necessary to offer any inducements to ‘soften up’ residents in order to encourage them to participate in my research (Homan, 1992). Whilst I did explain that the intention was that the findings and assessments made from my research might generate insights and improve understanding that would inform future provision and management of Extra Care and Retirement Housing for older people, I was careful not to overstate or exaggerate the positive impact that any individual’s contribution could make (Littlechild et al, 2015, p32). Although the views of residents and others about what they most like and dislike about Extra Care and Retirement Housing may not appear to be a particularly sensitive or contentious topic, it was still important to ensure that the case for participation did not gloss over any of the potential practical implications and realities of involvement (Doyle and Timonen, 2009, p259).

The general assumption of ethical approval processes tends to be that the anonymity of research participants should always be preserved, which was described by Heggerty (2004) as being symptomatic of 'ethics creep'. It has been suggested that this could have unintended consequences, of allowing the power of the dominant to remain hidden and protected whilst denying those without influence an opportunity to see their story being told (Alder and Alder, 2002). Although I have not named the research locations or identified individual resident participants (or Housing 21 staff members), this does not provide absolute privacy protection. It would be possible, by checking the details and locations of Housing 21 properties, to put names and addresses to Retirement Housing sites A-K and Extra Care sites 1-5. Because I have also recorded the antecedents of participants (such as the gender, age, relationship status and length of residence or residents and the job titles of staff members) it might be possible for a participant to identify their own data within the study or for someone familiar with the participant or the identities and demographic profile of the residents at the particular site to also recognise them as a participant. This prospect was expressly raised and confirmed as being accepted by all participants as part of the process of ensuring informed consent was obtained. I also took the decision to not to use pseudonyms or offer any anonymity protection to External Opinion Shapers who also participated in the study in order to allow the reader of the research to assess the status, reputation and credibility of the opinions of these participants. This was made explicit to these participants in the Participant Information Sheet and hence two versions of the Participant Consent Form were required.

The Q sorting process allowed participants to play an active role in shaping their own contributions to my research, but I recognised that this "does not unproblematically guarantee better data, improved understanding ... or power-free relations" (Roy, 2012, p15). There is still a risk that any discourse could become 'appropriated' (Cowden and Singh, 2007) or interpreted in a manner that leads to "a different ... more sophisticated type of exploitation" (Carey, 2010, p17). My intent has been to minimise the scope for embarrassment or any adverse impact on participants whilst ensuring that their involvement and contributions are respected in the quality of the research (McLaughlin, 2009; Staley, 2009; Fudge et al, 2007). Along with a commitment to provide participants with a summary of the research findings prior to publication<sup>22</sup>, I also gave them the option to withdraw their consent and have their data removed from my study at any time up to 31<sup>st</sup> December 2019.

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<sup>22</sup> Summaries of the overall findings and the results for the specific site were sent to resident participants in July 2019 with a reminder that any resident could ask to have their data removed from the study as well as an offer to discuss the findings with them if they wished. I received feedback from a number of the resident participants, directly and via court managers, to say that they appreciated receiving the summary and could identify with the results that it had produced.

## **5C.4 Dementia Prevalence and Participation**

A potentially material consideration in the design of research engaging older people, particularly in care or support settings, is the extent to which people with mental impairments and especially dementia are included or excluded from the scope of the study. As stated in the preceding section (5C.3) in respect of the ethics of participation, I started with a presumption of competence so as to not prematurely exclude people who were capable of providing informed consent. I was, however, guided by and benefited from the advice and awareness of local staff at each of the research sites who, along with family members, provided assistance to help some residents to decide if they wanted to participate and complete the study. They were also able to identify others for whom they felt the exercise would be too problematic, so did not encourage them to get involved, in order to avoid causing them any embarrassment or distress.

Two primary considerations that are of relevance in determining whether issues of mental capacity and dementia might have significantly altered the profile of Extra Care or Retirement Housing participants completing the study, so as to produce a distorted or incomplete picture, are:

- 1) the prevalence of dementia within the settings from which participants were recruited; and
- 2) the extent to which dementia is likely to have influenced and impaired the capacity of residents intending to participate.

- **Prevalence of Dementia in Extra Care and Retirement Housing**

The Alzheimer's Society estimate there are over 885,000 people in the UK living with dementia and predict that by 2040 that this will increase to 1.6 million (Wittenberg et al, 2019). Even though dementia is not a natural part of ageing, the incidence of dementia does increase significantly with age such that only 6% of the people living with dementia in the United Kingdom are aged under 65. Approximately 7% of the older population in the United Kingdom are likely to be affected by dementia, but the incidence of dementia increases to over 16% amongst those aged over 80 (Wittenberg et al, 2019; Prince et al, 2014).

Over a third of those living with dementia are thought to be living in a care home setting (Prince et al, 2014) and it is estimated that some 70% of care home residents are living with dementia (Thraves, 2016). Although it is suggested that of the remaining two thirds of people with dementia who live in their own homes about half live in specialist forms of housing (Moore et al, 2017, p16) and that the prevalence of dementia in such settings is likely to increase (Barrett, 2020), there is still a lack of clarity, certainty or conclusive evidence about the prevalence and severity of dementia amongst residents of Extra Care and Retirement Housing (Dutton, 2009).

A Personal Social Services Research Unit (PSSRU) study of 609 residents with an assessed care requirement who moved into one of 909 units of Extra Care in 19 schemes funded in part by the Department of Health's Extra Care Housing Fund between April 2006 and October 2007 found that whilst 34% had some form of cognitive impairment for many this was only borderline, mild or moderate and just 3.1% had a moderately severe or severe impairment (Darton et al., 2008; 2012). The equivalent levels of severe impairment for residents moving into residential care and nursing homes were 39% and 54%, thus confirming that despite the intention that Extra Care should act as an alternative to care homes they may not necessarily be fully addressing the needs of older people living with advanced dementia. Bäumker et al (2012) also noted that there was a lower incidence of dementia and cognitive impairment amongst those moving into larger 'village' type developments (with over 250 properties) at just 6% compared with 21% in the smaller standard forms of Extra Care with typically between 35 and 75 properties. However, this study also found that the lowest response rate to the questionnaire based survey was from the dementia specialist Extra Care scheme, suggesting that as the prevalence of dementia increased this could lead to a decrease in levels of participation.

In a longitudinal study of how Extra Care could respond to the changing social care needs of residents (Cameron et al, 2019; Evans et al, 2020), 3 of the initial 51 participants withdrew due to the progression of their dementia, but a further 6 participants were not able to progress with the study for other health reasons and 7 participants were also removed from the study due to death, moving or withdrawal of consent. This seemed to indicate that, despite dementia being a factor, it may not have been the primary influence on levels of ongoing research participation.

Twyford (2016) adopted Barrett's (2012) description of four broad approaches to the provision of Extra Care to support people with dementia as, 'integrated' (i.e. people with dementia live in alongside other residents), 'separated' (i.e. people with dementia live in a separate part of the scheme from other residents), specialist (i.e. the scheme is entirely devoted to supporting people with dementia) and hybrid (i.e. extra care forms part of a wider scheme including residential care). Twyford (2016), found that there had been a move away from separated, specialist and hybrid forms of provision to an integrated model (which is the model adopted across Housing 21's Extra Care sites) despite the tensions this could create between people living with dementia and the desires of other residents. Dutton (2009) also recognised that there were a number of potential difficulties in accommodating residents with dementia in Extra Care, not only in terms of the impact that challenging behaviours associated with dementia could have on others, but also in securing and funding the levels and flexibility of care staff time and expertise required to respond to fluctuating yet increasing needs arising from the progression of dementia. It is perhaps because of the difficulties in addressing these concerns that specialist housing and Extra Care in particular, despite being promoted as an alternative to care home provision, is not seen

as necessarily the best option for people who have advanced dementia (Dutton, 2009; Barrett, 2012) and appears to be accommodating far fewer people with dementia than is the case for residential and nursing care homes.

In the absence of any systematic recording or assessment of the incidence and severity of dementia in specialist housing, various attempts have been made to collect and compare evidence of levels of diagnosed and suspected (undiagnosed) dementia in Extra Care and Retirement Housing settings.

- Barrett (2012) found that estimates of the prevalence and severity of dementia varied significantly not only between providers of Extra Care but also according to the size, age and type of service proposition, with reported levels of diagnosed dementia ranging from 7% to 22% with estimates of further suspected cases of dementia in the range of 2% to 17% with an overall average of 10% of residents with a diagnosis and 8% with dementia being suspected but undiagnosed.
- Alzheimer's Society had suggested that only 8.1% of Extra Care residents were living with dementia (Prince et al, 2014) but even the report's authors suggested that this was probably an under estimate and need to be treated with caution.
- A survey in 2002 of 21 Extra Care schemes operated by Hanover Housing Association found that 9% of residents had a diagnosis of dementia but a further 15% were believed to have undiagnosed dementia. However, less than 1% of the cases of dementia were described as being severe (Baker, 2003).
- In 2017 Housing 21 had surveyed the managers of its Extra Care and Retirement Housing schemes in 2017 and found that for Extra Care schemes 17% of residents were living with a diagnosis of dementia and a further 7% were living with suspected dementia (total 24%) and for Retirement Housing schemes 4% of residents had a diagnosis of dementia and a further 7% were living with suspected dementia (total 11%).
- MHA (formerly Methodist Homes for the Aged) had found that in its 28 Extra Care settings 14.1% of residents had a dementia diagnosis and a further 7.5% were suspected of having dementia (producing a total of 21.6%) and for their retirement housing diagnosed dementia was significantly lower at 5.3% but 8.9% of residents were suspected of having undiagnosed dementia (producing a total of 14.2%) (Barrett, 2020). However, it was noted that these figures were averages and there were significant differences in the incidence of dementia between settings.
- Barrett et al (2020) also collected data on the prevalence of dementia in a number of Extra Care and retirement Housing schemes operated by different providers as part of research on 'walking with purpose'. This found that across 42 Extra Care schemes 14.2% of residents had a dementia diagnosis and 5.3% had suspected but undiagnosed dementia (total 19.5%) and in 106 Retirement Housing schemes 4.9% of residents had a dementia diagnosis and there were also 4.9% of residents with suspected but undiagnosed dementia (total 9.8%).

Although these statistics present a somewhat confused picture of the prevalence of dementia in Extra Care and Retirement Housing it is clear that there are far fewer cases than in Residential

and Nursing Home settings. The relatively high proportion of cases that have not been formally diagnosed suggests that in many of these cases the severity of the dementia may only be moderate or slight and as a consequence might not have precluded residents having capacity to participate in this research.

- **Capacity to Participate**

Prior to the 1990s there were few research studies that considered the perspectives of people living with dementia and they were purposefully excluded from many research projects on the assumption that dementia would render them incompetent or incapable of being reliable research participants (Hubbard et al, 2003). This medical orthodoxy, that precluded consideration of the diversity of personal circumstances, abilities and contexts of people living with dementia, has generally been replaced by a starting assumption of capacity to participate, but this is still often subject to a requirement for capacity to be tested and validated (Sherratt et al, 2007). Although a number of capacity assessment tools and scales have been developed to determine the capacity of people with dementia to give consent, there is no 'gold standard' that can provide a conclusive assessment (Mitty, 2012). Because the capabilities of people living with dementia fluctuate over time and different situations and types of investigation may draw upon different skills and abilities, a particular score on a dementia cognition test should not be seen as being a determinative indicator of suitability or capacity to participate in research (Woods and Pratt, 2005).

There is also an ethical dimension to treating people with dementia only as subjects or objects of research, rather than providing them with the opportunity to be included as research participants (Cotrell and Schulz, 1993; Downs, 1997; Hellstrom et al, 2007). Moody (1985) suggested that a sense of meaning and purpose can be achieved by being able to contribute and participate in research and Dewing (2002; 2008,) argues that people living with dementia should still be seen as respected self-creating agents whose views still have weight and value.

Where residents are deemed incapable of providing informed consent, relatives or carers are often called upon to act as their proxies in determining whether consent should be given to their participation. But their role as 'gatekeepers' controlling access and determining the suitability of people living with dementia to participate and express a view is considered to be problematic. Such proxies are likely to have a different outlook and perspective so their own preferences are not necessarily the best surrogate for the views of a person who is living with dementia (Bartlett and Martin, 2002; Lepore et al, 2017).

Dewing (2002, p159) also questions the appropriateness of the traditional cognitive competence based assessments as the basis for informed consent, suggesting it might be construed as being



‘existentially threatening’ and thus recommends suggested that obtaining consent from a research participant with dementia should be regarded as part of a process of engagement rather than an assessment event (Denning, 2008).

The third edition of the Alzheimer’s Society’s Dementia Friendly Housing Charter states that ‘life doesn’t end when dementia begins’ (Moore et al, 2020) and it is suggested that a shift in attitude may still be required to “see people with dementia as individuals with knowledge and experience, rather than as members of a category associated only with impairment” (Waite et al, 2019, p768)<sup>23</sup>. Thus, although it is considered likely that there were some residents in the Extra Care and Retirement Housing sites that were engaged in this research who would have been living with dementia that should not have precluded them from having the opportunity to participate in this research.

## **5D: The Process and Practicalities of Q Sorting**

### **5D.1 Administering the Q Sorts**

The data collection element of Q methodology involves the rank-ordering of the statements of the Q Set by placing them in an order that is significant from the subjective standpoint of each participant (Brown, 1980, p195). As this is an ‘extensive study’ with multiple participants, it is important that each participant completes the sorting process according to the same ‘condition of instruction’.

I asked resident participants to sort the statements in response to the following question:

***Based on your experience and views, when you think about Retirement Housing or Extra Care, what is it that you would most like and want, or would most dislike and not want?***

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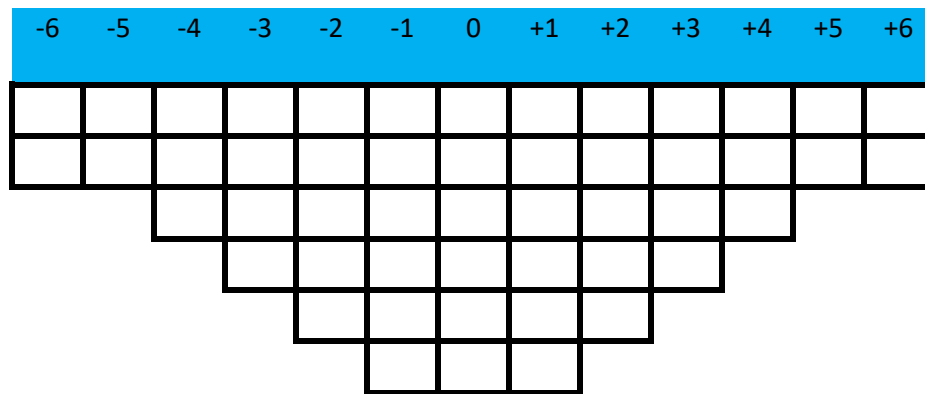
<sup>23</sup> Housing 21 has appointed a resident from one of its Extra Care schemes who is living with dementia as a member of its Board because the dementia diagnosis is not seen as precluding them from continuing to function as an effective company director and their insights and experiences are seen as being of distinct value and likely to enhance the quality of governance and decision making.

For non-resident participants I asked them to sort the statements in response to the way they thought residents of Retirement Housing or Extra Care would respond to this question. I emphasised that participants were not being asked to grade the availability or quality of the services and features of their current home, but rather were being required to rate how important and desirable (or otherwise) each of the aspects of Retirement Housing or Extra Care identified in statement of the Q set would be to them.

The statements are arranged along a continuum from ‘most’ to ‘most’ (i.e. most dislike to most like). Stephenson (Burt and Stephenson, 1939) advocated that the statements should be arranged in a grid pattern in the form of a quasi-normal distribution. Although this has now become the norm for Q methodology studies, it is acknowledged that the grid could be arranged in any way (Block, 2008) or participants could even be allowed a free choice about how they distribute the statements along the continuum. The benefit and effect of the normal grid pattern is that it forces participants to choose statements to position at the extreme ends of the scale where they statistically have more impact and therefore helps to more clearly differentiate between the positions of different participants.

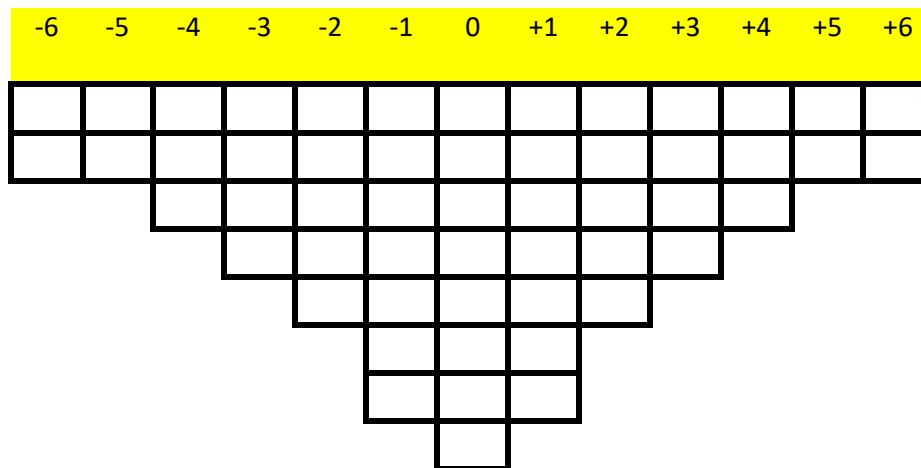
Following the pilot process, I adopted grid patterns that arranged the 50 statements for Retirement Housing and the 54 statements for Extra Care on a 13 point continuum from -6 to +6<sup>24</sup> as shown in Figure 5D.1 for Retirement Housing and Figure 5D.2 for Extra Care.

**Figure 5D.1: Grid Pattern for Retirement Housing Study**



<sup>24</sup> The initial grid produced had a 15 point scale from -7 to +7 but this was changed as the software package used for analysing the results only permits a maximum range from -6 to +6

**Figure 5D.2: Grid Pattern for Extra Care Study**



I arranged to visit each of the sites identified for my study in order provide guidance to participants and administer the Q sorting process in person. The Q sorting was done using laminated sets of cards I had produced with the statements printed on them that were then physically arranged on boards that had the grid pattern marked out. Although this may have been more time consuming (for me as a researcher) than arranging for the Q sorting to be done on-line with the aid of a software package, it was considered to be worthwhile. As well as making the process easier and more acceptable to older people it allowed me to engage with participants in order ensure they understood the task and were able to give informed consent.

Brown (1980, p200) recommended conducting Q sorting in person in order to effectively interview and capture the comments of the participants as they undertake the sorting process, but I found that most resident participants preferred to be left to consider the statements and undertake the sorting process in silence making relatively few comments apart from occasional exclamations about the pertinence or provocation of a particular statement. Participants were though asked to give reasons for selecting the statements at the extremes of the array (at +6 and -6) as well as being asked about their experience of the sorting process, whether they felt the statements were relevant and if they felt there was anything that had been missed.

Q studies are intended to be thought provoking and force people to make considered choices so reading, evaluating and arranging 50 statements is not a quick or easy exercise. A small number of potential participants said that it was not for them and either did not start or soon abandoned the sorting process<sup>25</sup>. Most participants completed the sorting process in around 30 minutes

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<sup>25</sup> I did not record the number of potential participants who considered and declined to participate in the process but this is thought to represent under 5% of the number of actual participants. Three residents started and then abandoned the sorting process, two saying it wasn't for them and the third because they had to leave for a hospital appointment.

and although some took longer, this was often because they chose to spend some time reviewing, refining and discussing their array rather because of any difficulty with the process. I ensured that participants were offered a drink of tea or coffee together with biscuits or cakes to sustain them and were able to take a break if desired at any stage during the process. Most residents seemed comfortable completing the sorting process in the communal areas alongside other residents, but on two occasions residents took up the offer of allowing them to do the sorting exercise in the privacy of their own home. I provided larger statement cards for any residents who had visual impairments that made the small cards difficult to read and a small number of residents were assisted during the sorting process by either by me, a member of Housing 21 staff or a relative.

I did consider whether to get Housing 21 staff and external influencers to complete the sorting process on-line. Van Tubergen and Olins (1979) demonstrated that Q studies could be completed based on instructions mailed out in the post and an initial validation study did not reveal any reliability concerns with computer based Q sorting (Reber et al, 2000). Although Liston and Hong (2015) did suggest there was a higher propensity to review and adjust sorts that had initially been undertaken on-line rather than in-person, this only considered a very small number of cases and could be seen as measuring an effect other than the effectiveness of on-line sorting process. However, it was not because of any concerns about the appropriateness of on-line sorting that I chose to also administer the Q sorting process with non-resident participants in person as well. It made sense whilst at each site to get the on-site staff to complete the process in person and other Housing 21 managers were able to complete the study at Housing 21's offices. I also took the view that it was simpler, more engaging and respectful to travel and arrange to meet the relatively few external opinion shaper participants in person than try to set up a suitable on-line sorting platform just for them.

## **5D.2 Dates for Data Collection**

As Q methodology only provides a 'snap-shot' of perspectives frozen at the moment in time when it was completed (Watts and Stenner, 2005) I sought to visit the study sites to collect the data over as short a period as possible since points of view can vary over time and be affected by changing events and circumstances. Arrangements were made to visit sites and start data collection as soon as ethical approval for my research project was granted on 31<sup>st</sup> May 2018. An initial session to pilot the statements and data collection process with residents and staff was held at Housing 21's offices in Birmingham on 5<sup>th</sup> June. As a result of the pilot exercise some revisions and additions were made to the statements and data collection framework prior to

commencing visits to sites. The first site visit took place on 11<sup>th</sup> June 2018 with the last visit occurring on 19<sup>th</sup> September 2018. The schedule of dates when sites were visited and the number of Q sorts completed are shown in Table 5D.1.

**Table 5D.1: Dates of Site Visits and Number of Resident and On-Site Participants Completing Q Sorts.**

Date	Location	Region	Resident Participants	On-Site Staff Participants
11 <sup>th</sup> June '18	EC Site 1	EAST	15	3
13 <sup>th</sup> June '18	EC Site 4	WEST MIDLANDS	9	3
25 <sup>th</sup> June '18	EC Site 5	NORTH EAST	21	5
28 <sup>th</sup> June '18	RH Site E	SOUTH EAST	9	2
3 <sup>rd</sup> July '18	RH Site C	EAST	9	2
4 <sup>th</sup> July '18	RH Site J	YORKSHIRE & HUMBER	24	2
6 <sup>th</sup> July '18	RH Site A	EAST	10	1
16 <sup>th</sup> July '18	EC Site 3	SOUTH WEST	14	3
17 <sup>th</sup> July '18	RH Site B	EAST	18	1
23 <sup>rd</sup> July '18	RH Site G	SOUTH WEST	13	1
24 <sup>th</sup> July '18	RH Site D	SOUTH EAST	16	1
6 <sup>th</sup> August '18	RH Site F	SOUTH WEST	21	2
17 <sup>th</sup> August '18	RH Site H	WEST MIDLANDS	14	2
22 <sup>nd</sup> August '18	EC Site 2	SOUTH EAST	9	2
24 <sup>th</sup> August '18	RH Site K	NORTH EAST	13	1
19 <sup>th</sup> September '18	RH Site I	EAST MIDLANDS	10	1

Pictures taken of residents undertaking the sorting process at Extra Care Sites 1 and 5 (after obtaining consent for photographs to be taken and published) are shown in Appendix 8.

## **5E: Deciding on the Basis for Undertaking Q Study Analysis**

### **5E.1 Mathematical Analysis of Subjective Assessments**

Having conducted the Q study, the Q Sorts (i.e. the arrays produced) by each set of participants need to be subject to a process of statistical factor analysis that looked for correlations, as well as differences, between them. Q methodology seeks to identify patterns and relationships within and across the participants rather than in the items or statements that they were asked to sort. As a consequence the factors that are identified represent 'clusters of subjectivity' (Brown, 1993)

that typify a particular shared point of view or perspective. Each participant's Q sort effectively expresses a distinctive subjective position that can then be compared and classified in relation to the Q sorts of other participants (Brown, 1980, p208). Q methodology measures the correlation and extent to which Q sorts congregate (i.e. load) on one identified factor more than others. If people are like minded with respect to the topic and have a similar perspective their Q sorts will load on the same factor, but if they differ those differences will also be evident and lead to a greater degree of association with another factor.

Notwithstanding the potentially enormous number of possible permutations and configurations that can be created through the Q sorting process, patterns of commonality and consensus do tend to arise. As indicated above in section 5C.1, this supports the notion of 'finite diversity' or 'limited independent variety' (Stainton Rogers, 1995, p180) which suggests that there is a limit to the number of ways in which discourses or opinions will come together to form a view on any issue or topic.

The analysis of this data involves factor analysis and is an inherently mathematical process that is best performed with the aid of an appropriate software package. I used the package 'PQ Method' (Schmolck and Atkinson, 2014) to analyse the results. PQ Method is a free to access DOS program that, despite its rather old fashioned look and feel, is widely used by Q methodologists. Full instructions are provided within the software package, with Watts and Stenner (2012) also providing a comprehensive guide to using the programme and analysing the output it produces. But despite being described as being "a purely technical, objective procedure" (Van Excel and De Graff, 2005, p8) there are some important choices and judgements that need to be made in determining the basis and approach to the analysis of data in Q methodology.

## **5E.2 Centroid or Principal Component Analysis**

PQ Method offers two options for undertaking the factor analysis, providing a choice between 'Centroid' and 'Principal Component Analysis' methods. When Q methodology was first being developed Stephenson (1953) used the centroid method of factor analysis. The centroid method was referred to by Burt (1940) as a "simple summation model" and Brown (1980, p209) acknowledges that this is not as mathematically precise in its calculations as the principal component method.

The principal component analysis is claimed to be mathematically superior because it provides an invariant and definitive solution to the identification of factors and correlations. But it is

because the principal component approach produces a conclusive answer and seen as being a 'closed model' (Cattell, 1965, p198) that is resisted by some Q methodologists. Principal component analysis is thought to be incompatible with the inherent variability of participant responses and exploratory nature of the analysis that is said to be an essential element of the ethos of Q methodology. Centroids are less precise and thus seen as 'centres of gravity' that still permit researchers to explore the correlations and interpret the data rather than being presented with a fixed final solution (Brown, 1993).

Kline (1994) provides a point by point comparison of principal component and centroid analysis and the two methods have been shown to produce very similar results (Harman, 1976). Although there are passionate advocates for each approach, ultimately the choice between them should reflect the nature of the enquiry being undertaken. As my study is essentially abductive in nature and recognises that there may be many alternative ways of understanding the discourse about Extra Care and Retirement Housing, I opted to use the centroid method for my analysis.

### **5E.3 How Many Factors?**

It is a matter of judgement about how many distinct factors or points of view as can identified within the data. My intention was to find as many distinct factors or points of view as could sensibly be supported, whilst also attempting to account for as much of the variability in the correlation matrix between the participants as possible (Brown, 1980, p209) and applying the principle of 'parsimony' (McKenzie et al, 2011) to find solutions that maximised the number of Q sorts loading significantly on just one factor and minimised the number of Q sorts that were excluded.

Brown (1980, p223) recommends 'as a rule of thumb' starting by looking for seven factors and as a consequence this is the default number of factors for extraction in PQ Method. Although Brown describes seven as the 'magic number' of factors, he recognises that this will not always be the right solution and further rumination may be needed in order to find the most suitable number of factors for examination. Watts and Stenner (2012, p107) suggest trying to extract "one factor for approximately every 6-8 participants in your study", but admit there is no statistical basis for that advice and recognise that once a saturation point has been reached adding more participants to a study will not continue to produce more distinct factors or sets of opinions. A number of tests and criteria have been developed to guide the determination of the number of factors that should be identified.

- **Kaiser-Guttman Criterion and Maximum Variance Explanation**

The Kaiser-Guttman Criterion (Guttman, 1954; Kaiser, 1960) states that the number of factors should be determined by a requirement for the eigenvalue (EV) of a factor to be greater than 1. A factor's EV is calculated by summing together the squared loadings of all the Q sorts on that factor<sup>26</sup>. In standard factor analysis the eigenvalue is seen as being indicative of the strength of a factor's explanatory power. If the EV of a factor is less than 1 it is an indication that it accounts for less variance than would be expected from a single Q sort (Watts and Stenner, 2005, note 7; Watts and Stenner, 2012, p106). But there are risks associated with merely requiring the EV to be greater than 1 as this could lead to the extraction of an overly large number of factors (Kline, 1994). Watts and Stenner (2012, p105) also recommended that factors should be extracted in order to explain as much of the variance in the correlation matrix as is possible, with Kline (1994) proposing that a result which explains of 35-40% of variability should generally be considered to be a sound solution. However, Brown (1980, p233) indicated he considered, in the context of Q methodology, criteria based on "eigenvalues and total variance are relatively meaningless".

- **Humphrey's Rule**

Humphrey's rule states that "a factor is significant if the cross-product of its two highest loadings (ignoring any sign) exceeds twice the standard error" (Brown, 1980, p223). The standard error is one divided by the square root of the number of items in the Q set. For the Retirement Housing study the standard error is  $1 \div \sqrt{50} = 0.1414$ , so to satisfy Humphrey's rule the product of the two highest loadings on a factor must exceed 0.2828. For the Extra Care study the standard error is  $1 \div \sqrt{54} = 0.1361$ , so to satisfy Humphrey's rule the product of the two highest loadings on a factor must exceed 0.2722.

- **Two (or more) Significantly Loading Q Sorts on each Factor**

The statistical significance of a loading of a Q sort on a factor can be calculated with an equation given by Brown (1980, p222 and pp279-288). A significant loading is calculated as  $M \times \text{Standard Error}$  (i.e. 0.1414 for the Retirement Housing study and 0.1361 for the Extra Care study) where  $M$  is the multiplier that corresponds to different degrees of statistical significance  $P$ . The multipliers for different levels of statistical significance are given by Brown (1980, pp222-223) and shown in Table 5E.1.

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<sup>26</sup> Alternatively the EV can be determined once the variance of a factor is known by multiplying this by the number of Q sorts in the study divided by 100



**Table 5E.1: Multipliers and Values of Loadings for different levels of Statistical Significance**

Level of Significance	Multiplier	Statistically Significant Loading for RH	Statistically Significant Loading for EC
$P \leq 0.001$	3.29	$3.29 \times (1 \div \sqrt{50}) = 0.4652$	$3.29 \times (1 \div \sqrt{54}) = 0.4478$
$P \leq 0.01$	2.58	$2.58 \times (1 \div \sqrt{50}) = 0.3648$	$2.58 \times (1 \div \sqrt{54}) = 0.3511$
$P \leq 0.05$	1.96	$1.96 \times (1 \div \sqrt{50}) = 0.2771$	$1.96 \times (1 \div \sqrt{54}) = 0.2668$

According to this rule for the Retirement Housing study loadings need to be in excess of 0.3648 in order to be considered significant at the  $p \leq 0.01$  level and in excess of 0.4652 to be considered significant at the  $p \leq 0.001$  level and for the Extra Care study and loadings need to be in excess of 0.3511 to be considered significant at the  $p \leq 0.01$  level and in excess of 0.4478 to be considered significant at the  $p \leq 0.001$  level. However, Watts and Stenner (2012, p199) suggest that if there is a lot of confounding in the results it might be appropriate to raise the level at which a factor is considered to be significant. A threshold of 0.5 (i.e. above the  $p \leq 0.001$  level of significance) has been used for both the Extra Care and Retirement Housing studies as this had the benefit of increasing the number of distinctive sorts identified to define factors.

Brown (1980, pp40-2) was sceptical about applying any of these criteria as arbitrary and formulaic rules, as there is no statistically 'correct' solution to determine the number of factors that should be extracted in any Q study. They can, however, be used as part of an iterative process to determine how many factors to extract. The basis for the assessments made regarding the number of factors that could be identified are included alongside the results from PQ Method in Appendices 9, 10, 12 and 13.

#### **5E.4 Factor Rotation**

Watts and Stenner (2012, p114) suggest that the process of factor rotation is easier to demonstrate by doing or showing than by written explanation, but used an analogy of the potential different viewpoints achieved by sitting in different positions in a lecture theatre, while Brown (1980, pp224-226) sought to illustrate the process by reference to a transparent sphere with the position of the Q sorts represented by black dots embedded inside it. The fundamental notion that underpins the process of rotation is that "reality can ... be examined from different vantage points" (Brown, 1980, p226). By the process of rotation, the investigator is able to orientate the lines of sight to examine the Q sorts from different angles. This does not affect the consistency or integrity of the individual Q sorts or the relationship between them and only alters the perspective from which they are observed.

Rotation may be undertaken either mathematically or manually based on the judgements and interests of the researcher. 'Varimax' is an objective mathematical approach to rotation devised by Kaiser (1960) that operates statistically to find the optimal configuration to give maximum distinction between factors so that each Q sort defines (i.e. has a high factor loading) in relation to only one of the factors and the factors are positioned so that the overall solution maximises the amount of study variance that is explained. The criticism of the Varimax approach, made by those who favour manual rotation, is that in the process of maximising the degree of variance it may miss or overlook particular characteristics or nuances. Manual rotation, however, allows different orientations to be selected that, whilst potentially failing to maximise the total study variance, can give prominence to a preconceived theory or a particular line of enquiry that may be of special interest (Brown, 1980; Thompson, 1962).

Stainton-Rogers and Stainton-Rogers (1990) suggest that Varimax rotation should be adopted when Q methodology is used as a tool of social constructionist enquiry as it does not make assumptions or seek to prefer one viewpoint or discourse over another. As my intention is to undertake an abductive study and I am not seeking to prove or disprove a prior hypothesis I used Varimax rotation in order to provide the best rotation results for this study.

## **5F: Reporting and Interpretation of Results**

### **5F.1 Output from PQ Method**

PQ Method provides the results of the analysis in a form of a '.lis' file that can be printed using Microsoft WordPad. The output consists of a series of tables. The four tables highlighted in yellow contain the core results and it is the data from these tables that have been extracted to provide the descriptions and analysis for each of the Q studies that were undertaken in either the text or appendices of this thesis. The other tables of PQ Method represent a lot of the same information in different formats in order to assist with the process of analysis and comparison.

#### **o Correlation Matrix**

Correlations provide a measure of extent of the match or relationship between any two Q sorts and hence indicates the extent of their similarity. The Correlation Matrix table produced by PQ Method thus shows the inter-correlation of each Q sort with every other Q sort and hence provides an overview of the extent of the association between all the Q sorts in the study.

- **Unrotated Factor Matrix**

This shows the extent to which each individual Q sort is associated with each of the Factors identified by the study, but before rotation to a best fit position. PQ Method does, however, also show the eigenvalues and the percentage of the study variance that each of the Factors explain. A Factor's eigenvalue (EV) is calculated by summing the squared loadings of all the Q sorts on that Factor (and not just the Q sorts that load on that Factor).

The variance is linked to the eigenvalue by the equation:

$$\text{Variance of Factor} = 100 \times (\text{EV} \div \text{number of Q sorts in the study})$$

Taken together the eigenvalue and study variance offer a clear indication of the potency and potential explanatory power of an extracted Factor.

- **Rotated Factor Matrix (with X Indicating a Defining Sort)**

PQ Method using the 'Varimax' procedure rotates Factors so that statistically they are positioned to ensure that, so far as possible, each Q sorts has a high factor loading in relation to one, but only one, of the Factors and thereafter seeks to position the Factors so that taken together the Factors account for the maximum amount of study variance. The loadings demonstrate the extent to which each Q sort is associated with each of the identified Factors. Where a Q sort loads significantly on just one Factor the loading on that Factor is marked with an 'X'.

- **Factor Scores with Corresponding Ranks**

This shows the z scores for each statement or item against each Factor and where it sits in a ranking of the statements from most positive to most negative for each Factor.

Because each Factors may be constituted from a different number of significant Q sorts the total weighted scores do not provide an appropriate basis for comparison and hence the need to calculate the z scores (i.e. standardised scores). The z score is calculated on the following basis:

$$z \text{ score for item 1 in respect of Factor 1} = (\text{total weighted scores for item 1} - \text{mean of total weighted scores for all items}) \div \text{Standard Deviation of total weighted scores for all items.}$$

PQ Method provides a lot of output based on z scores and some Q methodologists only use these as the basis for their analysis (Zambelli and Bonni, 2004), but it is more common for Q methodologists to use the rankings to produce factor arrays (i.e. a single Q sort, in the same grid configuration used in the study, configured to represent the viewpoint of each Factor). Hence, although this table contains much of the key information required for analysis it is not generally reproduced when reporting results (Watts and Stenner, 2012). Because factor arrays replicate the format in which the data was originally collected they are easier to understand and are also considered by some Q methodologists (Brown, 1980, p243) to be more consistent with the holistic and gestalt ethos of Q methodology in seeking to capture the essence of each Factor as a whole rather than a collection of standard scores.

- **Correlations Between Factor Scores**

This shows the extent to which the factor arrays for each of the Factors inter-correlate. This is useful in understanding the relationship between Factors. If there are especially high and significant correlations between Factors then this might suggest they are too alike to be interpreted as being distinct (i.e. they are simply manifestations of the same viewpoint), but alternatively despite the high correlation there may be specific or subtle points of difference that are considered to justify their retention as distinct Factors.

#### ○ **Factor Scores - For Each Factor**

With these tables PQ Method provides a ranking of all the statements or items in the Q set for each Factor based on their z scores. These ranking can then be used to form a factor array for each Factor (which is also shown subsequently, but not in rank order, in the table of 'Factor Q-Sort Values for Each Statement')

#### ○ **Factor Characteristics**

This table essentially provides a check on the reliability and error measures of the factor arrays for each of the Factors and also indicating the number of defining Q sorts linked to each Factor.

Because factor estimates are essentially based on averages of the defining Q sorts they will become more stable and hence more reliable if there are more scores that define them. Hence it is recommended that there should be at least two (and preferably more) Q sorts for each Factor (Brown, 1980, pp289-298).

#### ○ **Descending Array of Differences Between Pairs of Factors**

These tables identify and arrange the items or statements from those with the biggest to those with the smallest differences in the z scores between each pair of Factors. There is a table for each possible pairing of Factors. The aim of these tables is to assist in seeing the elements that make one Factor like or different from any other Factor, but does not provide information that is not already provided in another form.

#### ○ **Factor Q-Sort Values for Each Statement**

This table sets out the factor array (i.e. Q-sort) scores of each statement or item in the Q set against each of the Factors. This provides confirmation of the factor array for each Factor (that can also be determined using the data from the 'Factor Scores - For Each Factor' table) and an easy way to compare the relative positioning of statements and items across the Factors.

#### ○ **Factor Q-Sort Values for Statements sorted by Consensus vs Disagreement**

This table also uses the factor array (i.e. Q-sort) positioning to arrange all the items or statements in the Q set according to the degree of consensus or contention. The statements about which there is most consensus in the positioning across all Factors are at the top and those where there are the greatest differences at the bottom.

#### ○ **Distinguishing Statements for Each Factor**

These tables (one for each Factor) list all the statements or items that a particular factor has ranked in a significantly different way from all the other Factors. This is determined by PQ Method on the basis of statistical significance (probability < 0.05 and if probability < 0.01 marked with an asterisk) using z-scores. Because of the preference for analysis based on factor arrays rather than z-scores the assessment of distinguishing statements used in this study has based on rankings for an item or statement by the Factor being apart from the rankings by other Factors being different by at least two positions.

#### ○ **Consensus Statements**

This table identifies the consensus statements or items in the study. These are the items whose scores do not significantly differ between any pair of Factors because all the Factors

have ranked them at pretty much the same level. As with the distinguishing statements (above) this is determined by PQ Method on the basis of statistical significance (probability < 0.05 and if probability < 0.01 marked with an asterisk) using z-scores. Because of the preference for analysis based on factor arrays rather than z-scores the assessment of consensus statements in this study has been based on factor array rankings where the position of a statement across all Factors differs by less than two positions.

## 5F.2 Interpretation

The statistical correlation and factor analysis of data from a Q study is not an end in itself, but “merely a way station and a condition through which data must pass on their way to revealing their structure” (Brown, 1993, p110). Rather than focusing on particular points or issues in an atomistic manner, the objective of the interrogation of the Q study should be to holistically engage with, describe and understand the entire configuration of results. Although there is “no set strategy for interpreting a factor structure” (Brown, 1980, p247), various crib-sheets and strategies are suggested by Watts and Stenner (2012) (in addition to the various formats of the tables produced by PQ Method) in order to aid the process of exploring what the results reveal.

The first stage in the abductive and interpretive process is to identify the factors arising from the Q Sorts produced by participants and present them in a manner that reveals the concepts, assumptions and judgements they contain. Deciding how to present and interpret the outputs does though require judgement and reflection on the nature of the data and its potential implications.

The loadings of participants on the different factors can be simply illustrated using a Venn diagram. Although insights can come from considering the background and details of the participants associated with each factor, it is important to remember that the factors are not traits or types, so even if all participants loading on a factor shared a common characteristic it cannot be inferred that the characteristic and the perspective are necessarily linked. Probably the most useful and important piece of output is the factor array for each of the identified perspectives that represents the arrangement that would be produced if there was a perfect match with that factor. From the factor array it is possible to draw out and provide a narrative description of the key characteristics of each factor and it is also common to ascribe a label or name to each perspective that seeks to cut through the complexity and capture the essence and distinctiveness of each perspective (Watts and Stenner, 2012, p160), but Dryzek (1996, p132) described this as “the most parsimonious form in which to present a discourse”.

The second stage of the abductive process involves using these results and the output from the analysis of Q studies as the clues and inspiration to help propose new possibilities, generate novel

generalisations and suggest surprising insights (Blaikie, 2010; Tavory and Timmermans, 2014). Stephenson (1953, p152) suggested this task should be approached with “a fresh and puzzled attitude ... believing nothing and expecting little”.

In Chapter 6 I will show how the individual arrangements and expressions of opinion and preference produced by Q methodology can be used to identify the facets and features of Extra Care and Retirement Housing that are valued or not valued by residents on a micro basis. In Chapter 7 I seek to reveal the extent and basis for any tensions or areas of consensus between perspectives at each site and consider how these perspectives are shaped by the meso circumstances and character of each setting. In Chapter 8, I use the factor arrays from the initial studies as inputs into a second order analysis of factors in order to identify the purpose and underlying macro level influences on the preferences of residents living in Extra Care or Retirement Housing.

The details and analysis of results from these three levels of analysis are considered in Chapter 9 as the basis to propose a theoretical perspective and framework, while Chapter 10 concludes with and assessment of the contribution and critique of this thesis.

### ***Chapter 5 Contribution***

*This chapter has shown the decisions and judgements that have been made for each stage and element of this Q methodological study. It demonstrates how the concurrence of perspectives was produced on a 'bottom-up' basis and distilled into a Q set, but with a pilot study and additional validation of the coverage and relevance of the issues and statements identified. It explains how participants were invited to participate on an ethically justified self-selected basis, but from a variety of different sites and locations in order to provide a cross-section of views, with a check on how these compared with the demographic profile of all residents at each site and the overall profile of residents in Housing 21's Extra Care and Retirement Housing. It describes how the Q methodological assessments were administered and also sets out the basis for the judgements made with regard to analysis that will inevitably influence the number and nature of the perspectives identified and available for interpretation.*

## Chapter 6

# Micro Findings and Personal Perspectives

*This chapter presents the primary results from factor analysis of the Q studies undertaken with 68 Extra Care residents and 157 Retirement Housing residents on a combined and a site by site basis. It identifies distinct sets of preference within each population of participants and provides descriptions of their distinguishing characteristics. It seeks to identify the issues or features which appear to separate the perspectives and where there are areas of consensus.*

*The degree of correlation between the perspectives is also considered and assessed.*

*In addition the chapter adopts an alternative approach of only identifying a single collective viewpoint for each study as a potential basis for comparison of results between settings or with the views of different categories of participant.*

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## 6A: Finding Factors of Shared Perspectives

### 6A.1 Q Study Assessments

The purpose of making Q study assessments is to consider the patterns of preferences and opinions within the Q sorts of individual participants and to seek to identify areas of consensus and drivers of divergence between their perspectives. This allows for the characterisation and comparison of positions and points of view with the intention that these will not only offer insights into the nature and prioritisation of the likes and dislikes of residents of Extra Care and Retirement Housing, but also provide a basis for an abductive assessment and speculation as to the of the nature of the causes of these perspectives.

Assessments were made to identify factors, representing shared patterns of preference and perspective, within the results from the combined groups of 68 Extra Care participants and the 157 Retirement Housing residents. The results and the shared subjective viewpoints within the Q sorts produced by the residents were also considered on a site by site basis for each of the five Extra Care sites (1-5) and eleven Retirement Housing sites (A-K). As indicated in Chapter 5, my intention within each study was to identify as many distinct sets of perspectives (i.e. Factors) as could be justifiably sustained in order to account for as much of the variability between the participants as possible. I also wanted to find solutions that maximised the number of Q sorts that loaded on, and hence were constitutive of, just one factor as well as minimising the number of Q sorts that were excluded because they were either non-significant (i.e. did not have a correlation with any of the factors above the significance level) or confounded (i.e. had a loading above the significance threshold for more than one factor). The assessments required to determine the number of perspectives that could be identified from the Combined Extra Care and Combined Retirement Housing results and from each of the sites (1-5 Extra Care and A-K Retirement Housing) were considered in Section 5E and details are provided in Appendices 9, 10, 12 and 14. The numbers of participants and perspectives identified are summarised in Tables 6A.1 and 6A.2.

**Table 6A.1: Numbers of Participants and Perspectives Identified for Combined Extra Care Results and Sites 1-5**

Extra Care Combined:	68 Participants	3 Perspectives
Extra Care Site 1:	15 Participants	3 Perspectives
Extra Care Site 2:	9 Participants	1 Perspective
Extra Care Site 3:	14 Participants	3 Perspectives
Extra Care Site 4:	9 Participants	2 Perspectives
Extra Care Site 5:	21 Participants	3 Perspectives

**Table 6A.2: Numbers of Participants and Perspectives Identified for Combined Retirement Housing Results and Sites 1-5**

Retirement Housing Combined:	157 Participants	4 Perspectives
Retirement Housing Site A:	10 Participants	2 Perspectives
Retirement Housing Site B:	18 Participants	3 Perspective
Retirement Housing Site C:	9 Participants	2 Perspectives
Retirement Housing Site D:	16 Participants	3 Perspectives
Retirement Housing Site E:	9 Participants	2 Perspectives
Retirement Housing Site F:	21 Participants	3 Perspectives
Retirement Housing Site G:	13 Participants	2 Perspectives
Retirement Housing Site H:	14 Participants	3 Perspectives
Retirement Housing Site I:	10 Participants	3 Perspectives
Retirement Housing Site J:	24 Participants	4 Perspectives
Retirement Housing Site K:	13 Participants	2 Perspectives

Rather than focus on recoding the positioning of each particular statement or issue in an atomistic manner, the objective of the Q analysis is to provide a holistic assessment of the combined configuration of perspectives. The emphasis in the presentation of the results has therefore been on drawing out the key characteristics of each of the factors detected as well as identifying the issues that distinguish one perspective from other perspectives and considering the matters for which there is a consensus view across all perspectives.

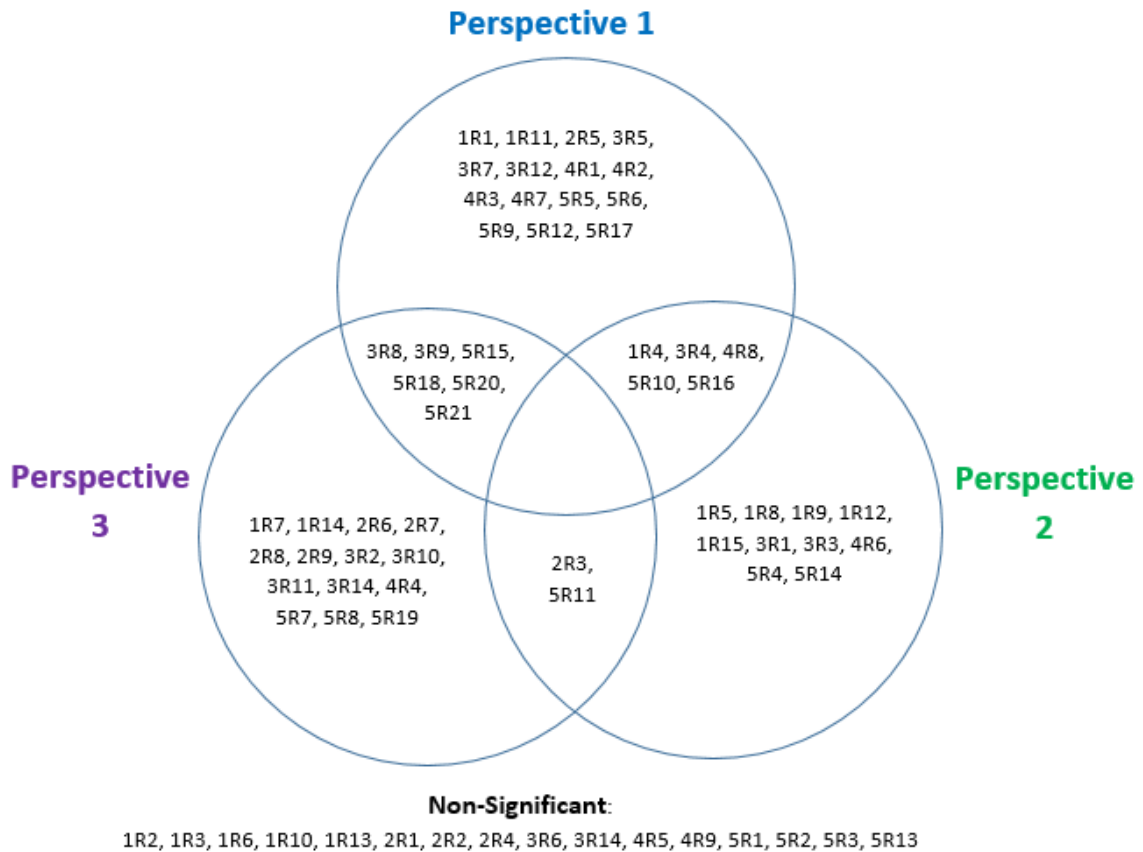
## **6A.2 Extra Care Combined Results**

The study considered the Q sorts of 68 Extra Care resident participants. This is in excess of the number of participants that might be typically expected in a Q study, but is a consequence of the aggregation of the results from residents recruited at five separate sites. Although it has been suggested that collecting responses from large numbers of participants might have the effect of masking some of the subtleties of the distinctions that emerge from smaller studies, it is intended to consider the results from this combined study alongside and in addition to the results from each of the five Extra Care Sites to obtain the most complete picture of the variety of perspectives amongst Extra Care residents.

As a result of the process of comparison and assessment of different possible solutions, a three factor solution was found to be the most robust and sustainable basis for analysis. With this three factor solution all three factors had eigenvalues of over ten, at least ten significant and non-confounded loadings at a 0.5 significance threshold level and accounted for a study variance of 56%. However, the sorts of thirteen participants were confounded as they were significant for more than one factor and the sorts of sixteen participants were non-significant as they did not

meet the 0.5 significance threshold for any of the factors. This means that the sorts of over 42.6% (29 out of 68) of the participants did not play a part in shaping these perspectives. Extracts of the results from PQ method for this solution are provided in Appendix 8.

**Figure 6A.1: Distribution of Extra Care Combined Sorts across Three Perspectives**



### Combined Extra Care Perspective 1 – Engaged, Independent and In Control

This perspective wants to feel safe and secure (#17: +6) but is also determined to be able to maintain their independence (#28: +6) and have the freedom to live as they choose (#27: +4) in their own home with its own front door (#24: +5) and with security of tenure (#14: +3). Having a court manager who can provide help and advice (#1: +5) is seen as being more important than having care staff on-site 24 hours a day 7 days a week (#51: +4). Although they do not want a manager who lives on-site (#2: -4), it would be worse if they were only employed on a part-time basis (#3: -5). They also want to be able have their say and raise matters with senior managers (#29: +3).

They like having social events they can get involved in (#19: +3) and being kept informed about local plans and activities (#43: +2) is more important than having information about costs and charges (#44: 0). They also do not object to residents taking control and assuming responsibility for organising things (#33: +1) and want to be engaged so they have the opportunity to exercise choice and control (#30: +2).

**Table 6A.3: Characteristics of Participants Representative of Combined EC Perspective 1**

1R1	85-95	F	ALONE	6 M TO 1 YEAR
1R11	75-85	F	ALONE	6 M TO 1 YEAR
2R5	65-75	M	ALONE	3 TO 5 YEARS
3R5	65-75	F	ALONE	3 TO 5 YEARS
3R7	75-85	F	ALONE	1 TO 2 YEARS
3R12	85-95	F	ALONE	5 TO 10 YEARS
4R1	85-95	F	ALONE	1 TO 2 YEARS
4R2	75-85	F	ALONE	1 TO 2 YEARS
4R3	65-75	M	ALONE	6 M TO 1 YEAR
4R7	65-75	M	ALONE	1 TO 2 YEARS
5R5so	65-75	F	PARTNER	2 TO 3 YEARS
5R6so	65-75	M	PARTNER	2 TO 3 YEARS
5R9	65-75	M	ALONE	6 M TO 1 YEAR
5R12so	65-75	M	ALONE	2 TO 3 YEARS
5R17so	75-85	F	ALONE	1 TO 2 YEARS

There is at least one participant associated with this perspective from each of the five Extra Care sites. Residents associated with Combined Extra Care Factor 1 appear to have a slightly lower age profile and shorter length of tenure than the profile of all Extra Care participants. Over half of those loading on this Factor are aged under 75 and only three of the fifteen were aged 85 or over while nine of the fifteen residents associated with this profile had been residents for less than two years.

**Table 6A.4: Distinctive Statements for Combined Extra Care Perspective 1**

	F1	F2	F3
#28 Independent living	+6	0	+3
#27 Freedom to live as you choose: no requirement to join in or conform	+4	+1	+1
#29 Able to have your say and raise matters with senior management	+3	0	+1
#33 Residents who take control and assume responsibility for organising things	+1	-1	-3
#5 No need to worry about maintenance and repairs	0	+3	+2
#6 Repairs or problems are addressed and fixed quickly	-1	+1	+3
#54 An accessible bath for those that want or need it (EC)	-3	-1	-1
#2 A resident manager or warden who lives on-site	-4	-2	0

Table 6A.4 shows statements identified as distinctive of Combined Extra Care Perspective 1 and where the ranking differs by at least two positions from the rankings for Perspectives 2 and 3.

## Combined Extra Care Perspective 2 – Care, Companionship and Peace of Mind

This perspective wants to be safe and secure (#17: +6) and sees the availability of care 24 hours a day 7 days a week as essential for this (#51: +6) along with a pendant or pull-cord to summons help in an emergency (#21: +5). They want peace of mind from being looked after (#10: +4) as well as to be treated with dignity and respect (#31: +5) by good staff (#48: +4).

They are not as concerned as other perspectives about having their own home and front door (#24: +3) or security of tenure (#14: 0), but think that a small flat would be a serious concern (#38: -6). They do want to have a communal lounge (#9: +2) and an on-site restaurant (#52: +3). Independent living is not a priority (#28: 0), but they do still want to be engaged and able to exercise choice and control (#30: +2).

This perspective is less concerned about residents living with dementia or who need to be looked after (#36: 0), but do not welcome residents with dogs, cats or other pets (#13: -4).

**Table 6A.5: Characteristics of Participants Representative of Combined EC Perspective 2**

1R5	85-95	M	ALONE	5 TO 10 YEARS
1R8	85-95	F	ALONE	6 M TO 1 YEAR
1R9	85-95	F	ALONE	5 TO 10 YEARS
1R12	85-95	F	ALONE	1 TO 2 YEARS
1R15	85-95	F	ALONE	2 TO 3 YEARS
3R1	65-75	F	ALONE	2 TO 3 YEARS
3R3	85-95	F	ALONE	2 TO 3 YEARS
4R6	85-95	F	ALONE	2 TO 3 YEARS
5R4	65-75	F	ALONE	1 TO 2 YEARS
5R14so	85-95	M	PARTNER	2 TO 3 YEARS

There are no participants associated with this perspective from Extra Care Site 2 and half of the participants are from Site 1 (with more than half of the participants from Site 1 who have significant loadings being associated with this perspective). Residents who were indicative of this Factor appeared to be older than the average and have longer tenure than the average profile for all Extra Care participants. Eight out of the ten participants loading on this Factor are aged over 85 while seven of the residents associated with this profile have been residents for over two years.

**Table 6A.6: Distinctive Statements for Combined Extra Care Perspective 2**

	F2	F1	F3
#51 Care staff on-site 24 hours 7 days a week if needed (EC)	+6	+4	+4
#21 Pull-cord or pendant to summon help in an emergency	+5	+2	+2
#10 Peace of mind that comes from being looked after	+4	+1	+1
#52 An on-site restaurant	+3	+1	-1
#24 You have your own home with your own front door	+3	+5	+6
#9 Use of a communal lounge and other shared facilities	+2	0	-2
#28 Independent living	0	+6	+3
#14 Security of tenure	0	+3	+4
#36 Residents with dementia or who need to be looked after	0	-2	-3
#37 Living in close proximity to others in a compact community	-1	-3	-3
#12 Occupancy restricted to only retired people aged over 65	-1	-3	-4
#44 Information about costs and charges is correct, clear and comprehensive	-2	0	+2
#3 A court manager who is only employed on a part-time basis	-3	-5	-5
#13 Residents are able to have dogs, cats or other pets	-4	-2	+1
#20 Availability of good internet connection and/or wifi	-4	-1	0
#38 Small flats	-6	-4	-4

Table 6A.6 shows statements identified as distinctive of Combined Extra Care Perspective 2 and where the ranking differs by at least two positions from the rankings for Perspectives 1 and 3.

### Combined Extra Care Perspective 3 – Security, Mobility and Amenity in Own Home

The top priorities for this perspective are to have your own home with its own front door (#24: +6) and for this to be accessible via a reliable lift (#46: +6) as well as having wide doors that are easy to open by people with reduced mobility (#45: +3). As with the other perspectives they want to be treated with dignity and respect (#31: +5) and to have access to care on-site 24 hours a day 7 days a week (#51: +4), but these are not distinctive or distinguishing desires. What is significant is the need to have security of tenure (#14: +4), the importance of having an effective and efficient heating and hot water system (#16: +5) as well as other amenities such as a communal laundry (#15: +1) and car parking (#22: +1).

Feeling safe and secure (#17: +2) and being looked after (#10: +1) are not top priorities. Having a court manager for help and advice, although appreciated, is less important than for other perspectives (#1: -3), but they do not want the court manager to only be employed part-time (#3: -5). This perspective wants to live independently (#28: +3), but does not want to exercise choice or control (#30: -1) or consider being able to have your say and raise matters with senior managers is particularly important (#29: +1).

This perspective does not want a communal lounge (#9: -2), probably because they also do not want to get involved in social events and activities (#19: -1) or feel any particular sense of community with people of a similar age and outlook (#11: -2; #23: 0). This

perspective is not looking for companionship from neighbours (#8: -2) and does not think occupancy needs to be restricted only to retired people aged over 65 (#12: -4). This perspective, however, is not opposed to residents with dogs, cats or other pets (#13: +1).

**Table 6A.7: Characteristics of Participants Representative of Combined EC Perspective 3**

1R7	75-85	M	ALONE	6 M TO 1 YEAR
1R14	85-95	M	ALONE	1 TO 2 YEARS
2R6	55-65	M	PARTNER	3 TO 5 YEARS
2R7	65-75	M	PARTNER	2 TO 3 YEARS
2R8	65-75	F	PARTNER	2 TO 3 YEARS
2R9	Under 55	M	ALONE	6 M TO 1 YEAR
3R2	65-75	F	PARTNER	5 TO 10 YEARS
3R10	85-95	M	PARTNER	1 TO 2 YEARS
3R11	75-85	F	PARTNER	1 TO 2 YEARS
3R14	75-85	F	ALONE	2 TO 3 YEARS
4R4	55-65	M	ALONE	1 TO 2 YEARS
5R7	65-75	M	PARTNER	6 M TO 1 YEAR
5R8	55-65	F	PARTNER	6 M TO 1 YEAR
5R19so	75-85	M	PARTNER	2 TO 3 YEARS

There is at least one participant associated with this perspective from each of the five Extra Care sites. There appears to be a relatively high proportion of males and residents living with partners associated with Combined Extra Care Factor 3. Nine of the fourteen residents loading on this Factor are living with partners and of the five participants associated with this profile who are living alone only one is female.

**Table 6A.8: Distinctive Statements for Combined Extra Care Perspective 3**

	F3	F1	F2
#46 A reliable lift	+6	0	+1
#16 An effective and efficient heating and hot water system	+5	+2	+2
#14 Having security of tenure	+3	-1	+1
#45 Wide doors, that are easy to open, for people with reduced mobility	+3	0	+1
#17 Feeling safe and secure	+2	+6	+6
#22 Sufficient car parking spaces	+1	-3	-3
#13 Residents are able to have dogs, cats or other pets	+1	-2	-4
#19 Social events and activities to get involved in	-1	+3	+3
#8 Companionship of neighbours so you are never lonely	-2	+1	+2
#9 Use of a communal lounge and other shared facilities	-2	0	+2
#33 Residents who take control and assume responsibility for organising things	-3	+1	-1

Table 6A.8 shows statements identified as distinctive of Combined Extra Care Perspective 3 and where the ranking differs by at least two positions from the rankings for Perspectives 1 and 2.

### Consensus Statements for Extra Care Combined Study

As well as the 30 distinctive statements where one perspective differs either positively or negatively by at least two positions from the rankings of the other perspectives, there are also 10 consensus statements where the rankings given by all three Combined Extra Care perspectives are less than two positions apart. These are shown in Table 6A.9.

**Table 6A.9: Consensus Statements for Combined Extra Care Study**

	F1	F2	F3
#48 Good staff who provide consistency of service	+3	+4	+4
#42 Checks on fire, electrical, gas, asbestos and water safety	+1	+2	+2
#7 The appearance of the Court creates a good impression	+1	0	0
#40 Buildings and gardens are kept clean and tidy	0	0	-1
#39 Properties and facilities that are modern and well-designed	0	-1	0
#4 Close to shops, amenities and transport	-1	-1	-1
#26 Being seen as a form of care home	-4	-3	-4
#34 People don't respect privacy or confidentiality	-6	-5	-5
#35 Gossip spreads quickly	-6	-5	-6
#32 Some other residents behave badly	-5	-6	-6

There appears to be a high degree of consensus and particularly strong view across all three of the Combined Extra Care perspectives that they do not want to lose their privacy or have to put up with the unwelcome behaviour of other residents. There is also a common desire to want to avoid the stigma of being seen as a care home. There is a consensus that having good and consistency of staff is a positive feature. Although it is not necessarily a top priority, there is also a strong positive consensus for properties to be checked and for residents to assured that they are safe. There is a shared view that matters of building design, appearance and location are neither particularly positive nor negative considerations, suggesting a view that these are simply accepted for what they are in each location.

### Summary of Extra Care Combined Findings

The results from the Combined Extra Care study show three distinct themes of preference:

- Perspective 1 – Wanting independence, to be in control and remain self-reliant, yet also seeking to be sociable and engaged as part of a community. It is possible that this perspective may be typified by younger and newer residents
- Perspective 2 – Wanting to be looked after, protected and cared for, but also valuing shared spaces and facilities. There are indications that this perspective may be more common amongst older and long-standing residents.



- Perspective 3 – Wanting the comfort, convenience and autonomy of their own home, with support when required, but without the need to engage with others. This perspective appears to be the most prevalent for men and couples.

Although an attempt has been made to suggest tentative links between Factors and particular participant characteristics, these are not intended to signify or suggest that these perspectives are necessarily indicative of particular resident types or traits. The nature and extent of any influence or association between the age, length of tenure and gender of participants and particular preferences or positions is considered further in Chapter 8.

Each of the perspectives appears to have a distinctive blend of multiple facets and features that are liked and disliked and particular issues that distinguish and set them apart from the other perspectives. There appears to be a consensus in respect of ten out of fifty four statements (18.5%) suggesting a settled view across different perspectives on these issues, but for thirty statements (55.6%) there appears to be a particularly distinctive difference of view that distinguishes at least one of the perspectives from the others.

### **6A.3 Extra Care Site Results**

The Extra Care Combined results are made up of the Q sorts obtained from Extra Care residents at sites 1-5, but separate site Q studies were also undertaken based on the Q sorts obtained from residents at each of the locations. At some sites there were only a limited number of residents who took part in the study and, perhaps as a consequence, only one or two perspectives were identified at the locations with less than ten participants. The results for each of the five Extra Care sites, including the basis for determining the number of factors identified, narrative descriptions of them and the factor arrays for each perspective are set out in Appendix 9.

Extra Care Site 1: 15 Participants, 3 Perspectives

**Extra Care Site 1 Perspective 1 – Looked After and Access to Amenities**

**Extra Care Site 1 Perspective 2 – Security of Tenure and Independence**

**Extra Care Site 1 Perspective 3 – Safety with Companionship and Control**

Extra Care Site 2: 9 Participants, 1 Perspective

**Extra Care Site 2 Single Perspective – Home and Help**

Extra Care Site 3: 14 Participants, 3 Perspectives

**Extra Care Site 3 Perspective 1 – Care and Help On-Call with Dignity and Respect**

**Extra Care Site 3 Perspective 2 – Community Spirit with Freedom and Independence**

**Extra Care Site 3 Perspective 3 – Security of Tenure in Own Home with Lift and Laundry**

Extra Care Site 4: 9 Participants, 2 Perspectives

**Extra Care Site 4 Perspective 1 – Living Independently in Your Own Home**

**Extra Care Site 4 Perspective 2 – Safe in an Age Specific Setting with Care On-Call**

Extra Care Site 5: 21 Participants, 3 Perspectives

**Extra Care Site 5 Perspective 1 – Freedom and Security of Home with Mobility**

**Extra Care Site 5 Perspective 2 – Care, Support and Dignity**

**Extra Care Site 5 Perspective 3 – Safe, Independent, Informed and Social**

### **Distinctiveness and Correlation of Extra Care Site Results**

As well as differences in the number of perspectives identified, there are subtle differences and a distinctiveness to each of the separate site perspectives. As with the Combined Extra Care study there appear to be a number of complexities and compromises inherent in the arrays of competing priorities and preferences within each of the site perspectives. Because the sample of participants that are characteristic of each perspective is relatively small it is not sensible to try to suggest any potential link or association with age, gender, length of tenure or relationship status of the participants. It is, however, of interest to consider, although not possible to prove, whether the differences between site perspectives are entirely a consequence of the differences in characteristics and preferences of the participants or whether the nature and context of the site may also be having an influence on the variations in the difference in outlook and disposition noted between different sites. The distinctiveness of each Extra Care site and their perspectives in comparison with the perspectives from other Extra Care sites will be considered further in Chapter 7.

The differences between the various Extra Care site perspectives can be considered by comparing the degree of statistical correlation of each of them with the Factors identified from the Extra Care Combined Study. The details of these correlations are shown in Table 6A.10.

**Table 6A.10: Correlation of Extra Care Site Factors with Combined Extra Care Factors**

	EC Combined Factor 1	EC Combined Factor 2	EC Combined Factor 3
EC Site 1 Factor 1	.67	.80	.68
EC Site 1 Factor 2	.74	.63	.84
EC Site 1 Factor 3	.63	.86	.44
EC Site 2	.71	.74	.90
EC Site 3 Factor 1	.77	.88	.76
EC Site 3 Factor 2	.82	.63	.61
EC Site 3 Factor 3	.71	.65	.85
EC Site 4 Factor 1	.85	.68	.73
EC Site 4 Factor 2	.73	.83	.61
EC Site 5 Factor 1	.77	.74	.85
EC Site 5 Factor 2	.81	.81	.75
EC Site 5 Factor 3	.92	.69	.56

This comparison of correlations of Extra Care site perspectives with the Factors identified from the Extra Care Combined Study demonstrates that there is a high degree of correlation between all the Extra Care site perspectives with all three of the Factors from the Extra Care Combined Study. With the exception of the 0.44 correlation between Extra Care Site 1 Factor 3 (Safety with Companionship and Control) and Combined Study Factor 3 (Security, Mobility and Amenity in Own Home), there is at least a 0.5 correlation with all the combined perspectives. This is indicative of a generally high degree of correlation between all the perspectives which suggests there is considerably more that unites the Extra Care residents who participated in this study than divides them.

Notwithstanding the general consensus of perspectives, there does still appear to be a stronger association (as evidenced by a particularly high correlation) between each of the site perspectives and one specific Factor from the Combined Extra Care study. All perspectives have at least a 0.8 correlation with one of the Combined Study Factors, with the exception of Extra Care Site 5 Factor 2 that has a 0.81 correlation for both Combined Study Factors 1 and 2. This seems to suggest that the themes and particular areas of preference and attitude identified in the Extra Care Combined Study are also manifest to some extent at each of the individual sites.

## 6A.4 Extra Care Individual, Site and Combined Correlations

The correlations between the individual Q sorts produced by each of the 68 Extra Care participants are shown in the correlation matrix in Appendix 10. Less than 5% of the correlations between Extra Care participants were at a level of 0.7 or above (shown highlighted in light blue), whereas 14% had correlations of 0.3 or under (shown highlighted in yellow).

7 of the 68 (10%) Extra Care Q sorts produced by participants did not load significantly on any of the Factors either on a combined or on an individual site basis so appeared to be outliers. These were: Site 1: P3, P10 and P13; Site 2: P1 and P4; Site 3: P14; and Site 5: P13 and are shown flagged in pink on the correlation matrix in Appendix 10. It may be that these participants had particularly distinctive points of view that were not matched by any other participants in the studies, but an alternative explanation is that the participants may have struggled with the sorting and prioritisation of statements in the Q process and therefore completed the Q sorting process on a more random than considered basis.

PQ Method produces a table showing the correlations between the factors that have been identified. This is helpful in identifying the degree of similarity or dissonance between the outlook and perspectives of the factors.

The correlations of Factors from Extra Care Sites 1, 3, 4 and 5 are shown in Appendix 9<sup>27</sup>. The lowest correlation of Factors was at Site 1 where Factor 2 (Security of Tenure and Independence) and Factor 3 (Safety with Companionship and Control) had a correlation of 0.52. The highest correlation of Factors was at Site 5 where Factor 2 (Care, Support and Dignity) and Factor 3 (Safe, Independent, Informed and Social) had a correlation of 0.74. Thus, as noted in Section 6A.3 above, even when the descriptions of the site perspectives appear to suggest that the participants have quite different perspectives and preferences, there are still many areas of commonality and consensus that they have in common that produce the relatively high correlations.

The correlations between the three Factors identified from the Combined Extra Care study are included in Appendix 8. The correlations range from 0.69 for Factor 2 (Care, Companionship and Peace of Mind) and Factor 3 (Security, Mobility and Amenity in Own Home) to 0.77 for Factor 1 (Engaged, Independent and In Control) and Factor 2 (Care, Companionship and Peace of Mind). These correlations are even higher than those of the site perspectives, which may be because the aggregation has the effect of reducing the significance of individual differences and variations. This emphasises that the distinctions being drawn between Factors and perspectives are matters of emphasis and not of antithesis between the Extra Care resident participants.

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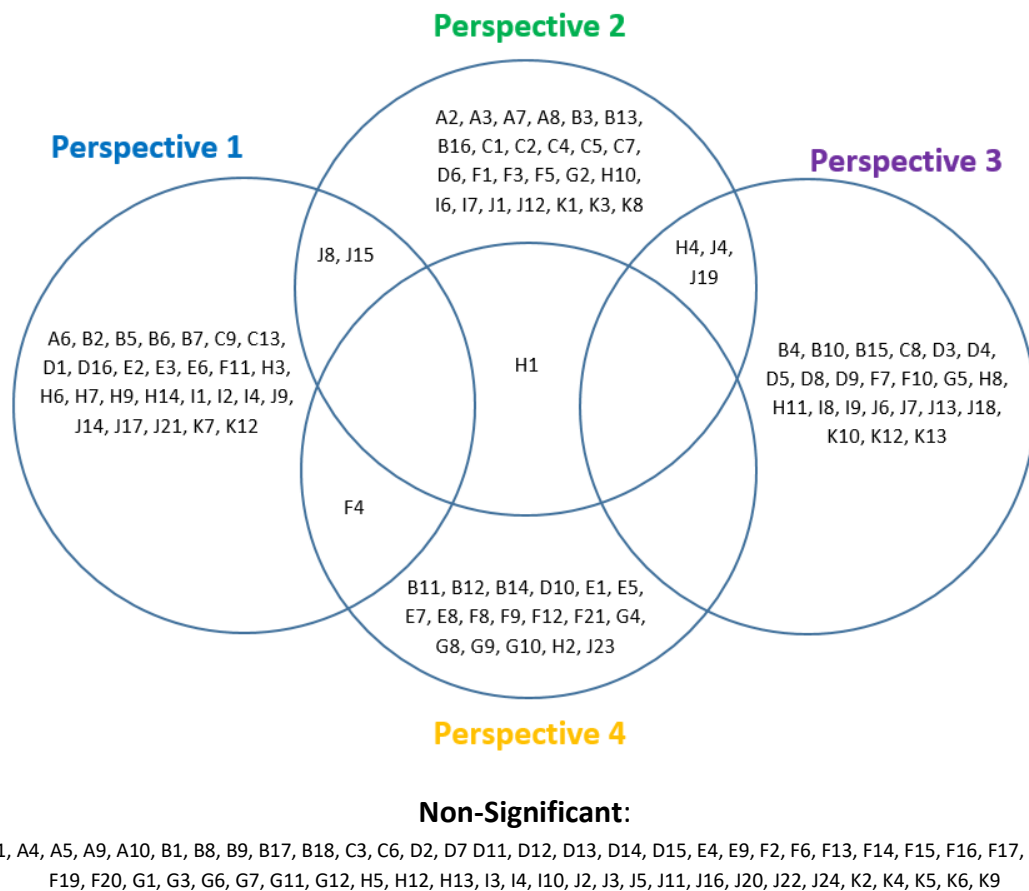
<sup>27</sup> There is no correlation table for Extra Care Site 2 because only one Factor was identified

## 6A.5 Retirement Housing Combined Results

The study considered the Q sorts of 157 Retirement Housing resident participants. This is considerably more than the number of participants that would normally be recruited for a Q study, but is a consequence of the aggregation of results from eleven separate site studies. Although it has been suggested that collecting responses from large numbers of participants can have the effect of masking some of the subtleties of the distinctions that emerge from smaller studies, it is intended to consider the results from this combined study alongside and in addition to the results from each of the 11 sites so as to obtain the most complete picture of the variety of perspectives amongst residents of Retirement Housing properties.

As a result of a process of comparison and assessment of different options, a four Factor solution was found to provide the most appropriate basis for analysis. With this solution all four Factors had eigenvalues of over seventeen, at least eighteen significant and non-confounded loadings at a 0.5 significance threshold level and accounted for a study variance of 52%.

**Figure 6A.2: Distribution of Retirement Housing Combined Sorts across Four Perspectives**



The sorts of seven participants were confounded as they were significant of more than one factor and the sorts of fifty-five participants were non-significant as they did not meet the 0.5 significance threshold for any of the factors. This means that the sorts of over 39.4% (62 out of 157) of the participants did not play a part in shaping these perspectives or points of view. Extracts of the results from PQ method for this solution are provided in Appendix 11.

### **Combined Retirement Housing Perspective 1 – Looked After and Dignified**

**A full-time court manager is seen as essential for this perspective (#1: +6; #3: -6), but they do not necessarily need to live on-site (#2: +2). They want to feel safe and secure (#17: +5) and hence want a pendant or pull-cord to summons help in an emergency (#21: +6).**

**They want the peace of mind that comes from being looked after (#10: +3) but it is even more important to be treated with dignity and respect (#31: +4) and to have consistency of service from good staff (#48: +4).**

**Although they value having their own home with its own front door this is not seen as being vital (#24: +3) and security of tenure is not a particular concern (#14: 0). They have a slight preference for independent living (#28: +2), but do not insist on having freedom to choose how they live (#27: 0) and do not want to exercise choice or control (#30: -1). They want to be kept warm with an effective and efficient heating and hot water system (#16: +5) and for repairs and problems to be sorted promptly (#6: +4) as well as having checks on fire, electrical, gas, asbestos and water safety (#43: +3).**

**They enjoy the companionship of neighbours (#8: +2) and appreciate the availability of a communal lounge (#9: +2), but they do not particularly like living around or feel a sense of community with others because they are of a similar age (#11: -1; #23: 0) and do not consider that occupancy should be restricted only to older people over 65 (#12: -3). They object to residents having pets (#13: -4) more than living in close proximity (#37: -2) or residents with dementia and in need of care (#36: -4).**

**Table 6A.11: Characteristics of Participants Representative of Combined RH Perspective 1**

AR6	85-95	F	ALONE	10+ YEARS
BR2	85-95	F	ALONE	3 TO 5 YEARS
BR5	55-65	F	ALONE	1 TO 2 YEARS
BR6	95-105	F	ALONE	10+ YEARS
BR7	75-85	F	ALONE	10+ YEARS
CR9	75-85	F	ALONE	3 TO 5 YEARS
DR1	55-65	F	ALONE	3 TO 5 YEARS
DR16	85-95	F	ALONE	1 TO 2 YEARS
ER2	85-95	F	ALONE	10+ YEARS
ER3	85-95	F	ALONE	10+ YEARS
ER6	85-95	F	ALONE	10+ YEARS
FR11	75-85	M	PARTNER	5 TO 10 YEARS
GR13	75-85	F	PARTNER	10+ YEARS
HR3	85-95	F	ALONE	2 TO 3 YEARS
HR6	85-95	M	PARTNER	5 TO 10 YEARS
HR7	75-85	F	ALONE	5 TO 10 YEARS
HR9	75-85	F	ALONE	1 TO 2 YEARS
HR14	75-85	F	ALONE	UNDER 6 MONTHS
IR1	55-65	M	ALONE	6 MONTHS TO 1 YEAR
IR2	65-75	M	ALONE	2 TO 3 YEARS
IR4	55-65	F	ALONE	1 TO 2 YEARS
JR9	55-65	F	ALONE	10+ YEARS
JR14	75-85	M	PARTNER	5 TO 10 YEARS
JR17	75-85	F	ALONE	UNDER 6 MONTHS
JR21	65-75	F	ALONE	1 TO 2 YEARS
KR7	85-95	F	ALONE	3 TO 5 YEARS
KR12	85-95	F	ALONE	10+ YEARS

There appears to be a tendency for participants associated with this perspective to be older, with 11 out of 27 (41%) residents being aged 85 or over and only 7 out of 27 (26%) aged under 75. They also appear to be residents who have had a longer tenure with a third of participants associated with this perspective having been residence for 10 years or more.

**Table 6A.12: Distinctive Statements for Combined Retirement Housing Perspective 1**

	F1	F2	F3	F4
#21 Pull-cord or pendant to summon help in an emergency	+6	+1	+3	+2
#46 A reliable lift	+3	0	-2	-3
#24 You have your own home with your own front door	+3	+6	+6	+6
#28 Independent living	+2	+4	+5	+4
#27 Freedom to live as you choose: no requirement to join in or conform	0	+3	+4	+2
#4 Close to shops, amenities and transport	-1	+2	+2	+3
#3 A court manager who is only employed on a part-time basis	-6	-2	-4	-4

Table 6A.12 shows statements identified as being distinctive of Combined Retirement Housing Perspective 1 and where the ranking differs by at least two positions from the rankings for Perspectives 2, 3 and 4.

### Combined Retirement Housing Perspective 2 – Property Maintenance and Independence

This perspective wants to be safe and secure (#17: +6) in their own home behind their own front door (#24: +6). They want security of tenure (#14: +5) but do not want to be looked after (#10: -1). Although there is value in having a court manager this is not of paramount importance (#1: +3) and they would rather have only a part-time court manager (#3: -2) than a manager who lived on-site (#2: -4).

They want an effective and efficient heating and hot water system (#16: +5) and to not have to worry about maintenance and repairs (#5: +4) and for repairs or problems to be fixed quickly (#6: +4). They want the buildings and gardens to be kept clean and tidy (#40: +2) and to ensure safety checks are undertaken (#43: +3).

This perspective is definitely not interested in social events (#19: -3) and wants to live independently (#28: +4) with freedom to choose not join in (#27: +3). They do not enjoy living in close proximity to others (#37: -4) and are not looking for companionship (#8: -2). They do not see the value in restricting occupation only to those aged over 65 (#12: -3) and do not see an advantage or get a sense of community from living around other people of a similar age and outlook (#11: -2; #23: -2). They do not, however, object to residents keeping pets (#13: +1).



**Table 6A.13: Characteristics of Participants Representative of Combined RH Perspective 2**

AR2	65-75	F	ALONE	5 TO 10 YEARS
AR3	65-75	F	PARTNER	5 TO 10 YEARS
AR7	65-75	M	ALONE	2 TO 3 YEARS
AR8	65-75	F	ALONE	6 MONTHS TO 1 YEAR
BR3	65-75	F	PARTNER	1 TO 2 YEARS
BR13	65-75	M	PARTNER	1 TO 2 YEARS
BR16	55-65	F	ALONE	2 TO 3 YEARS
CR1	55-65	F	ALONE	3 TO 5 YEARS
CR2	85-95	M	ALONE	2 TO 3 YEARS
CR4	65-75	M	ALONE	6 MONTHS TO 1 YEAR
CR5	65-75	M	PARTNER	6 MONTHS TO 1 YEAR
CR7	55-65	F	ALONE	5 TO 10 YEARS
DR6	75-85	M	PARTNER	10+ YEARS
FR1	75-85	F	PARTNER	5 TO 10 YEARS
FR3	65-75	F	PARTNER	5 TO 10 YEARS
FR5	75-85	M	PARTNER	10+ YEARS
GR2	65-75	F	ALONE	6 MONTHS TO 1 YEAR
HR10	75-85	F	ALONE	3 TO 5 YEARS
IR6	55-65	M	ALONE	UNDER 6 MONTHS
IR7	55-65	M	ALONE	UNDER 6 MONTHS
JR1	UNDER 55	M	PARTNER	5 TO 10 YEARS
JR10	55-65	M	ALONE	6 MONTHS TO 1 YEAR
KR1	75-85	M	ALONE	1 TO 2 YEARS
KR3	65-75	M	ALONE	3 TO 5 YEARS
KR8	55-65	F	ALONE	UNDER 6 MONTHS

Participants associated with this perspective appear to be younger with less than a quarter (6 out of 25) being aged 75 or over. There also appears to be a predominance of people who have become residents relatively recently, with over a third (9 out of 25) having been tenants for less than one year. More than half of the participants associated with this perspective are male and there is also appears to be a high proportion of people living with a partner associated with this perspective.

**Table 6A.14: Distinctive Statements for Combined Retirement Housing Perspective 2**

	F2	F1	F3	F4
#22 Sufficient car parking spaces (+2)	+2	-1	-1	-2
#18 A garden or balcony so you can sit out in private (+1)	+1	-3	-1	-2
#20 Availability of a good internet connection and/or wifi (+1)	+1	-3	-1	-2
#13 Residents are able to have dogs, cats or other pets (+1)	+1	-4	-3	-3
#10 Peace of mind that comes from being looked after (-1)	-1	+3	+1	+2
#23 Community spirit and friendship with people of similar age and outlook	-2	0	+3	0
#3 A court manager who is only employed on a part-time basis	-2	-6	-4	-4

Table 6A.14 shows statements identified as being distinctive of Combined Retirement Housing Perspective 2 and where the ranking differs by at least two positions from the rankings for Perspectives 1, 3 and 4.

### **Combined Retirement Housing Perspective 3 – Respect and Friendship**

**This perspective most wants to feel safe and secure (#17: +6) in their own home (#24: +6) but is not particularly concerned about having security of tenure (#14: +2) or with the repairs and maintenance (#5: +2; #6: +1). They want to live independently (#28: +5) and to have freedom to live as they choose (#27: +4), but do not want to engage with senior managers (#29: 0) or exercise choice and control (#30: 0). They want to have a court manager to turn to when they need help or advice (#1: +4), but do not want them to either live on-site or be only part-time (#2: -4; #3: -4). Residents with this perspective particularly want to be treated with dignity and respect (#31: +5).**

**Although they do not think occupancy should be restricted to only older people aged over 65 (#12: -2) they do enjoy the companionship of neighbours (#8: +4) and the sense of community spirit from friendship with others of a similar age and outlook (#23: +3).**

**Living in close proximity to others is still a slight disadvantage (#37: -1) and the gossip and bad behaviour are consistent in being regarded as the worst things (#32: -6; #35: -6). Having residents living with dementia or needing care is seen as being as bad as residents who have pets (#36: -3; #13: -3).**

**They also appreciate having a communal lounge (#9: +3) more than other facilities such as a laundry (#15: +1), an efficient and effective heating system (#16: +2), gardens (#18: -1), storage for buggies (#47: -3), a guest room (#50: -1) or even having modern kitchens and bathrooms (#41: -2).**

**Table 6A.15: Characteristics of Participants Representative of Combined RH Perspective 3**

BR4	95-105	M	ALONE	10+ YEARS
BR10	55-65	F	ALONE	1 to 2 YEARS
BR15	65-75	F	ALONE	1 to 2 YEARS
CR8	75-85	M	ALONE	UNDER 6 MONTHS
DR3	65-75	F	ALONE	1 to 2 YEARS
DR4	85-95	M	ALONE	3 TO 5 YEARS
DR5	65-75	F	PARTNER	10+ YEARS
DR8	65-75	F	ALONE	UNDER 6 MONTHS
DR9	65-75	F	ALONE	1 to 2 YEARS
FR7	55-65	M	PARTNER	3 TO 5 YEARS
FR10	65-75	F	PARTNER	5 TO 10 YEARS
GR5	65-75	F	ALONE	10+ YEARS
HR8	65-75	F	ALONE	UNDER 6 MONTHS
HR11	85-95	M	ALONE	10+ YEARS
IR8	65-75	F	ALONE	1 to 2 YEARS
IR9	85-95	F	ALONE	2 TO 3 YEARS
JR6	65-75	F	ALONE	5 TO 10 YEARS
JR7	55-65	F	ALONE	UNDER 6 MONTHS
JR13	75-85	M	ALONE	10+ YEARS
JR18	85-95	F	ALONE	5 TO 10 YEARS
KR2	75-85	F	ALONE	2 TO 3 YEARS
KR10	85-95	F	ALONE	2 TO 3 YEARS
KR11	65-75	F	ALONE	3 TO 5 YEARS

People who are in the ‘recently retired’ age band of 65 to 75 appear to be strongly represented amongst the participants associated with this perspective (11 out of 23) but a predominant characteristic is that in all but three cases (20 out of 23) they are people who are living alone.

**Table 6A.16: Distinctive Statements for Combined Retirement Housing Perspective 3**

	F3	F1	F2	F4
#8 Companionship of neighbours so you are never lonely	+4	+2	-2	-1
#23 Community spirit and friendship with people of similar age and outlook	+3	0	-2	0
#6 Repairs or problems are addressed and fixed quickly (+1)	+1	+4	+4	+3
#42 Checks on fire, electrical, gas, asbestos and water safety (-1)	-1	+3	+3	+1

Table 6A.16 shows statements identified as being distinctive of Combined Retirement Housing Perspective 3 and where the ranking differs by at least two positions from the rankings for Perspectives 1, 2 and 4.

## Combined Retirement Housing Perspective 4 – Age and Assurance

Having your own home with its own front door (24: +6) and a court manager to turn to for help and advice (#1: +6) are the top priorities for this perspective. But what makes this perspective particularly distinctive is the high preference for an on-site manager (#2: +5) and the strong view that occupancy should be restricted to only retired people aged over 65 (#12: +5).

The demand for an on-site manager is perhaps linked to the strong aversion to having a court manager only employed on a part-time basis (#3: -4), but does not seem to be matched by a particularly strong desire to feel safe and secure (#17: +3) or to be looked after (#10: +2). There is not even a particularly high preference to be treated with dignity and respect (#31: +3) or for good staff who provide consistency of service (#48: 0). This perspective still sees independent living (#28: +4) as important as well as emphasising some of the more property based aspects of the service such as not having to worry about repairs and maintenance (#5 : +4) and security of tenure (#14: +4).

Because of this perspective's preference for an age restriction it is surprising that they do not appear to see a particular advantage in living around people of a similar age and outlook (#11: +1) or consider that it creates a community spirit (#23: 0). They do not like living in close proximity to others in a compact community (#37: -3), or see a need for the companionship of neighbours (#8: -1). Nor do they want a communal lounge (#9: -1) or social events and activities (#19: -2).

They are less negative about other residents who are living with dementia or needing to be looked after (#36: -1) than other perspectives, but do not want residents with pets (#13: -3). As with other perspectives the things that are worst and they least want are the bad behaviour of other residents (#32: -6), gossip (#35: -6) and loss of privacy (#34: -5). For this perspective small flats (#38: -5) are seen as worse than being regarded as a form of care home (#26: -4).

There does not appear to be an obvious age pattern to participants associated with this perspective, but only 3 out of 17 participants have been residents for less than three years. This perspective has no participants associated with it from four of the eleven Retirement Housing sites (i.e. Sites A, C, I and K), but over 80% of the participants that do form this perspective come from just four of the eleven sites (i.e. Sites B, E, F and G) indicating there may be a relationship between particular site characteristic and the attitudes of residents at those sites.

**Table 6A.17: Characteristics of Participants Representative of Combined RH Perspective 4**

BR11	85-95	M	ALONE	3 TO 5 YEARS
BR12	85-95	F	ALONE	10+ YEARS
BR14	75-85	F	ALONE	6 MONTHS TO 1 YEAR
DR10	75-85	M	ALONE	10+ YEARS
ER5	85-95	F	ALONE	10+ YEARS
ER7	75-85	M	ALONE	10+ YEARS
ER8	65-75	F	PARTNER	5 TO 10 YEARS
FR8	75-85	M	PARTNER	5 TO 10 YEARS
FR9	55-65	F	PARTNER	2 TO 3 YEARS
FR12	65-75	F	PARTNER	5 TO 10 YEARS
FR21	65-75	F	ALONE	3 TO 5 YEARS
GR4	85-95	F	ALONE	5 TO 10 YEARS
GR8	65-75	M	ALONE	2 TO 3 YEARS
GR9	95-105	F	ALONE	10+ YEARS
GR10	75-85	M	ALONE	10+ YEARS
HR2	75-85	F	ALONE	3 TO 5 YEARS
JR23	65-75	M	ALONE	3 TO 5 YEARS

**Table 6A.18: Distinctive Statements for Combined Retirement Housing Perspective 4**

	F4	F1	F2	F3
#12 Occupancy restricted to only retired people aged over 65 (+5)	+5	-3	-3	-2
#2 A resident manager or warden who lives on-site (+5)	+5	+2	-4	-4
#17 Feeling safe and secure	+3	+5	+6	+6

Table 6A.18 shows statements identified as being distinctive of Combined Retirement Housing Perspective 4 and where the ranking differs by at least two positions from the rankings for Perspectives 1, 2 and 3.

### Consensus Statements for Retirement Housing Combined Study

As well as the statements that have been identified as being distinctive of a particular Combined Retirement Housing perspective, because they differ by at least two positions from the rankings of the other perspectives, there are also 8 consensus statements where the rankings given by all four perspectives are less than two positions apart. These are shown in Table 6A.19.

**Table 6A.19: Consensus Statements for Combined Retirement Housing Study**

	F1	F2	F3	F4
#15 A communal laundry room with washers and dryers	+1	+2	+1	+1
#29 Able to have your say and raise matters with senior management	+1	+1	0	+1
#25 In a nice area with attractive surroundings	0	0	+1	0
#30 Residents are engaged and able to exercise choice and control	-1	0	0	-1
#50 Guest room available for visitors	0	0	-1	-1
#34 People don't respect privacy or confidentiality	-5	-5	-4	-5
#35 Gossip spreads quickly	-5	-5	-6	-6
#32 Some other residents behave badly	-6	-6	-6	-6

As with the Combined Extra Care results, there appears to be a high degree of consensus and particularly strong view across all four of the Combined Retirement Housing perspectives that they do not want to lose their privacy or have to put up with the unwelcome behaviour of other residents. Although it is not a top priority, there is also a general low positive view about the provision of communal laundry facilities. There is a consensus neutral view about the importance of being able to raise matters with senior manager, being able to exercise control, being in a nice area and the provision of guest rooms. Just because there is not a strong positive or negative view on these matters from any of the perspectives, does not imply that they are not important considerations in the overall view of competing priorities and preferences.

### **Summary of Retirement Housing Combined Findings**

The results from the Combined Retirement Housing study shows four distinct themes of preference:

- Perspective 1 – Wanting protection and assurance as well as the presence of a full-time Court Manager. Although seems willing to sacrifice some degree of independence and autonomy to be assured of assistance, they do not want the Court Manager living on-site.
- Perspective 2 – Wanting to not only to have the autonomy of their own home but also have access to other personal and private amenities and facilities. However, does not want or need the support that comes from living in a community or feel any need to be looked after.
- Perspective 3 – Wanting companionship and to be a part of a community, but still has a desire to maintain their own freedom and independence. Is not, however, concerned about the practicalities of repairs or safety checks.

- Perspective 4 – Wanting to live in an age specific setting with a Court Manager who lives on-site, but despite this does not see the need to be protected and kept safe and secure.

There appear to be compromises and potential contradictions inherent in each of these Factors, which supports the view that the attitudes and preferences of residents are complex and multi-faceted. Each of the four Factors identified have points of distinction that set them apart from the others and these differences relate particularly to 19 out of 50 (38%) of the statements. There are, however, 8 out of 50 (16%) statements for which there is a common consensus view across all four Factors.

Although it cannot be asserted that there is a causal link or relationship between these perspectives and profile of the participants who form them, there are indications that there may be some patterns of preference amongst residents who share particular attributes or possible associations between preferences and the characteristics of specific sites. The nature and extent of any influence or association between the age, length of tenure and gender of participants and particular preferences or positions is considered further in Chapter 8.

## 6A.6 Retirement Housing Site Results

The Retirement Housing Combined results are made up of the Q sorts obtained from 157 Retirement Housing residents at sites A-K, but separate site specific Q studies were also undertaken based on the Q sorts obtained from residents at each of the locations. At some sites where there were fewer residents who took part in the study and this appeared to limit the number of perspectives that could be identified, hence locations with 13 or fewer participants only identified two perspectives while the site with 24 participants produced four perspectives. The results for each of the eleven Retirement Housing sites, including the basis for determining the number of factors identified, narrative descriptions of them and the factor arrays for each perspective are set out in Appendix 12.

Retirement Housing Site A: 10 Participants, 2 Perspectives

**RH Site A Perspective 1:           Secure But Not Social**

**RH Site A Perspective 2:           Supported But Not Small**

Retirement Housing Site B: 18 Participants, 3 Perspectives

**RH Site B Perspective 1:           Safety, Speed and Certainty**

**RH Site B Perspective 2:           Age exclusivity with No Worries**

**RH Site B Perspective 3:           Autonomy, Animals and Internet**

Retirement Housing Site C: 9 Participants, 2 Perspectives

**RH Site C Perspective 1: Own Home, Independence with Help on Hand**

**RH Site C Perspective 2: Safe, Secure and Convenient**

Retirement Housing Site D: 16 Participants, 3 Perspectives

**RH Site D Perspective 1: Support and Suitability**

**RH Site D Perspective 2: Home and Community**

**RH Site D Perspective 3: Safety and Respect but Independent**

Retirement Housing Site E: 9 Participants, 2 Perspectives

**RH Site E Perspective 1: Warm and Respected, with On-Site Manager**

**RH Site E Perspective 2: Age, Security and Independence**

Retirement Housing Site F: 21 Participants, 3 Perspectives

**RH Site F Perspective 1: Age, Independence and Parking**

**RH Site F Perspective 2: Modern, Maintained Property**

**RH Site F Perspective 3: Safe, Protected and Private**

Retirement Housing Site G: 13 Participants, 2 Perspectives

**RH Site G Perspective 1: Own Home and Age Exclusive**

**RH Site G Perspective 2: Court Manager and Safe Tenure**

Retirement Housing Site H: 14 Participants, 3 Perspectives

**RH Site H Perspective 1: Supported Independence, Warm and Secure**

**RH Site H Perspective 2: Own Home, Dignity and Amenity**

**RH Site H Perspective 3: On-Site Manager, Protected and Community Spirit**

Retirement Housing Site I: 10 Participants, 3 Perspectives

**RH Site I Perspective 1: Own Home with Dignity and Freedom**

**RH Site I Perspective 2: A Home without Community**

**RH Site I Perspective 3: Safety and Security without Support**

Retirement Housing Site J: 24 Participants, 4 Perspectives

**RH Site J Perspective 1: Tenure, Respect and Age**

**RH Site J Perspective 2: Supported, Social and Safe**

**RH Site J Perspective 3: Peace of Mind, Repairs and Personal Space**

**RH Site J Perspective 4: Dignity, Community Spirit and Standards**

Retirement Housing Site K: 13 Participants, 2 Perspectives

**RH Site K Perspective 1: Freedom, Tenure Security and Convenience**

**RH Site K Perspective 2: Independent, Home and Gardens**



## **Distinctiveness and Correlation of Retirement Housing Site Results**

As well as differences in the number of perspectives identified, there are subtle differences and a distinctiveness in the detail and emphasis of each of the separate site perspectives. As with the Combined Retirement Housing study there appear to be a number of complexities and compromises inherent in the arrays of competing priorities and preferences within each of the site perspectives. Because the sample of participants that are characteristic of each perspective is relatively small it is not sensible to try to suggest any potential link or association with age, gender, length of tenure or relationship status of the participants. It is, however, of interest to consider, although not possible to prove, whether the differences between site perspectives are entirely a consequence of the differences in characteristics and preferences of the participants or whether the nature and context of the site may also be having an influence on the variations in the difference in outlook and disposition noted between different sites. The distinctiveness of each Retirement Housing site and their perspectives in comparison with the perspectives from other Retirement Housing sites will be considered further in Chapter 7.

The differences between the various Retirement Housing site perspectives can be considered by comparing the degree of statistical correlation of each of them with the Factors identified from the Retirement Housing Combined Study. The details of these correlations are shown in Table 6A.20.

This comparison of correlations of the Retirement Housing site perspectives with the Factors identified from the Combined Retirement Housing study demonstrates that there is a high degree of correlation between all the Retirement Housing site perspectives with all four of the Factors from the Retirement Housing Combined Study. Only six out of twenty nine site perspectives do not have at least a 0.5 correlation with all four of the Retirement Housing Combined Study Factors. Sixteen perspectives have at least a 0.8 correlation with at least one of the Combined study Factors. Retirement Housing Site E Factor 2 (Age, Security and Independence) has a less than 0.5 correlation with Combined Study Factors 1 (Looked After and Dignified) and 3 (Respect and Friendship) which is in contrast with Retirement Housing Site H Factor 2 (Own Home, Dignity and Amenity) which had correlations of over 0.8 with Factors 1 and 3 of the Retirement Housing Combined Study.

In most cases there is a particularly high correlation (over 0.7) within each of the perspectives with one of the Factors from the Combined Retirement Housing study which is indicative of a particular alignment or preference with one of the four Combined Study Factors. However, in the case of Site I Factor 2 (A Home without Community) the highest correlation is 0.55 and there does not appear to be an especially strong alignment with any of the Combined Study Factors suggesting that the residents associated with the Site I Factor 2 perspective may not necessarily

fit the norms or profile for other Retirement Housing residents. In an number of other cases there appears to be a confounded preference, with three site perspectives having a correlation of 0.8 or over with more than one of the Retirement Housing Combined Factors (i.e. Site G Factor 1 with Combined Factors 3 and 4; Site H Factor 2 with Combined Factors 1 and 3; and Site J Factor 1 with Combined Factors 2 and 3).

**Table 6A.20: Correlation of Retirement Housing Site Factors with Combined Retirement Housing Factors**

	RH Combined Factor 1	RH Combined Factor 2	EC Combined Factor 3	EC Combined Factor 4
RH Site A Factor 1	.70	<b>.84</b>	.70	.54
RH Site A Factor 2	.72	.67	<b>.77</b>	.66
RH Site B Factor 1	<b>.86</b>	.65	.67	.65
RH Site B Factor 2	.68	<b>.45</b>	.66	<b>.81</b>
RH Site B Factor 3	.55	<b>.79</b>	.72	<b>.49</b>
RH Site C Factor 1	.61	<b>.84</b>	.66	.59
RH Site C Factor 2	<b>.46</b>	<b>.75</b>	.66	.54
RH Site D Factor 1	<b>.83</b>	.73	.77	.61
RH Site D Factor 2	.62	.54	<b>.84</b>	.63
RH Site D Factor 3	<b>.81</b>	.65	.68	.71
RH Site E Factor 1	<b>.76</b>	.50	.57	.69
RH Site E Factor 2	<b>.46</b>	.51	<b>.43</b>	<b>.77</b>
RH Site F Factor 1	.53	.66	<b>.71</b>	.69
RH Site F Factor 2	.47	<b>.75</b>	.54	.55
RH Site F Factor 3	.78	.70	.58	<b>.83</b>
RH Site G Factor 1	.69	.61	<b>.80</b>	<b>.86</b>
RH Site G Factor 2	.69	<b>.81</b>	.72	.66
RH Site H Factor 1	.79	.78	.70	.77
RH Site H Factor 2	<b>.80</b>	.59	<b>.81</b>	.67
RH Site H Factor 3	<b>.72</b>	<b>.32</b>	.52	.56
RH Site I Factor 1	.77	.65	<b>.84</b>	.71
RH Site I Factor 2	.51	.54	<b>.43</b>	.55
RH Site I Factor 3	<b>.75</b>	.62	.65	.53
RH Site J Factor 1	.63	<b>.84</b>	<b>.81</b>	.75
RH Site J Factor 2	<b>.91</b>	.54	.79	.69
RH Site J Factor 3	.65	<b>.71</b>	.55	.55
RH Site J Factor 4	.57	.71	<b>.85</b>	.63
RH Site K Factor 1	.73	<b>.80</b>	.76	.73
RH Site K Factor 2	.50	<b>.74</b>	.64	.58

## 6A.7 Retirement Housing Individual, Site and Combined Correlations

The correlations between the Q sorts produced by each of the 157 Retirement Housing participants are shown in the correlation matrix in Appendix 13. Under 1% of the correlations between the Retirement Housing participants were at a level of 0.7 or above (shown highlighted in light blue) whereas 26% had correlations of 0.3 or under (shown highlighted in yellow). This is a considerably lower proportion of high correlations and higher proportion of low correlations than is the case for the Extra Care participants, suggesting that there is more of a diversity of views amongst the Retirement Housing participants.

A pair of Q sorts from Retirement Housing participants appear to have a perfect correlation (Site E Residents 3 and 6). Given that there are more than  $3 \times 10^{64}$  potential different ways in which the statements could have been arranged it appears most unlikely that this occurred by chance and a more plausible explanation is that one of the participants submitted an array that had been produced by a prior participant as their own. There was another exceptionally high correlation of 0.92 between residents at Site E (Residents 2 and 4) which suggests there might also have been a degree of collusion or copying involved because even if the same participant produced two consecutive arrays the indicative level of correlation between them might normally only be expected to be in the region of 0.8 to 0.9 (Frank, 1956; Hilden, 1958; Steller and Meurer, 1974)<sup>28</sup>.

There were 13 of the 157 (8%) Q sorts from Retirement Housing participants that did not load significantly on any of the Factors either on a combined or on an individual site basis so appeared to be outliers. These were: Site B: P17; Site C: P3; Site D: P 7, P11; Site E: P9; Site F: P16, P18, P20; Site G: P7, P11; Site I: P3, P10; and Site J: P11 and are shown flagged in pink on the correlation matrix in Appendix 13. It may be that these participants had particularly distinctive points of view that were not matched by any other participants in the studies, but an alternative explanation is that the participants that produced them may have struggled with the sorting and prioritisation of statements in the Q process and therefore completed the Q sorting process on a more random than considered basis.

PQ Method produces a table showing the correlations between the factors that have been identified. This is helpful in identifying the degree of similarity or dissonance between the outlook and perspectives of the factors. The correlations of Factors from Retirement Housing Sites A-K are shown in Appendix 12.

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<sup>28</sup> Retirement Housing Site E was the first site where I undertook my research and after noting these unusual results I ensured that on all future occasions the completed arrays of each participant were deconstructed and removed from the boards before they were passed on to another participant.

The lowest correlation of Factors from a Retirement Housing Site is 0.35 at Site I between Factor 2 (A Home without Community) and Factor 3 (Safety and Security without Support). There are also correlations below 0.5 at Site B between Factors 2 and 3 (0.45) and at Site E between Factors 1 and 2 (0.47). These are lower site correlations than is evident between the perspectives identified at Extra Care sites and suggests that there may be a greater degree of difference in the priorities and preferences of Retirement Housing, but that these differences may be more pronounced at some particular sites. The highest correlation is 0.73 at Site D between Factor 1 (Support and Suitability) and Factor 3 (Safety and Respect but Independent) and at Site J between Factor 1 (Tenure, Respect and Age) and Factor 4 (Dignity, Community Spirit and Standards). Although the overall degree of consistency and consensus within Retirement Housing site does not appear to be quite as strong as it was for Extra Care, it is clear from the analysis in Section 6A.6 above that in many cases, even when the descriptions of the site perspectives appear to suggest residents may have different priorities and preferences, there are still areas of commonality and consensus that produce significant correlations.

The correlations between the four Factors identified from the Combined Retirement Housing study are included in Appendix 11. The correlations range from 0.63 for Factor 1 (Looked After and Dignified) and Factor 2 (Property Maintenance and Independence) to 0.78 for Factor 1 (Looked After and Dignified) and both Factors 3 (Respect and Friendship) and Factor 4 (Age and Assurance). These correlations are higher than those of the site perspectives, which may be because the aggregation has the effect of reducing the significance of individual differences and variations. These high correlations serve to indicate that the distinctions being drawn between Factors and the perspectives of Retirement Housing resident participants are more matters of emphasis than of antithesis.

## **6B: Single Centroid Views and Comparisons of Perspectives**

The primary purpose of Q methodology is to use factor analysis to reveal shared positions of difference and distinctiveness amongst the perspectives extant within a population of participants. I sought to do this in a manner that found as many distinct factors or points of view as could sensibly be supported whilst attempting to account for as much of the variability between the participants as possible and hence provide the maximum explicative value. I was nevertheless mindful of the principle of 'parsimony' so wanted to limit the number of Q sorts that had been provided by participants, but were excluded from the analysis because they either did not load sufficiently significantly on any of the Factors or were confounded because they loaded significantly on more than one Factor.

Because the correlations between the Factors for the Combined and each of the Site studies for Extra Care and Retirement Housing are so high, it could also be argued (although not accepted) that the results should be regarded as the manifestation of a single perspective. Although identification of single best fit perspectives within a population is not what Q methodology was designed to do, if this is what is done it can potentially provide a basis for making comparisons between different populations of participants rather than within the same set of people.

### **6B.1 Non-Q Methodological Average Scores and Statement Profiles**

It is possible to simply calculate an average (mean) score for each statement based on the sum of the rankings from all participants divided by the number of participants. Once the mean scores have been obtained, the statements can be ranked and arranged in priority order from the things most liked and wanted to the things least liked and not wanted. The standard deviation for each statement can also be determined in order to provide an indication of whether the scores given for each statement are consistent or whether there is a divergence of opinion between the participants on a particular issue. The distribution of the scores given to each statement by participants can also be plotted on a graph so that any patterns in the distribution are easily seen.

Although instinctively appealing and apparently informative, this form of analysis is more consistent with R methodology and standard quantitative analysis of questionnaire type data than with Q methodology. This approach treats the statements as the variables, rather than the real variables which are the arrays produced by the participants and also breaks the link between the relative prioritisation of different statements and the participants who produced the array such that the results and preferences can then only be considered atomistically rather than holistically.

Although it is not intended to use this non-Q methodological analysis of the results from the Extra Care and Retirement Housing participants to draw conclusions, the ranking of mean scores and distributions of scores for each statement may still be of interest and help to identify issues that might warrant further scrutiny or investigation so have been provided in Appendix 14 and have also been cited when considered pertinent to do so in the context of the discussion of findings and results in Chapter 9.

## 6B.2 Single Centroid Perspectives

It is possible to form an array using PQ Method and centroid analysis that just seeks to identify the single best fit perspective. Single centroid solutions have thus been produced for the 68 Extra Care participants and for the 157 Retirement Housing participants and each of the Extra Care and Retirement Housing study sites. The details of the loadings by participants and the single arrays produced for these single centroid perspectives are provided in Appendix 15 for Extra Care and Appendix 16 for Retirement Housing.

Table 6B.1 shows a comparison of the percentage of variance explained by the initial Extra Care site solutions and with the single centroid results for each site.

**Table 6B.1: Extra Care Comparison of Explicable Variance from ‘Best Fit’ and Single Factor Solutions**

	<b>Initial Extra Care Factor Solution</b>	<b>Single Centroid Results</b>
<b>Extra Care Combined</b>	56% 3 Factors 39/68 participants	49% 63/68 participants
<b>Extra Care Site 1</b>	52% 3 Factors 9/15 participants	44% 14/15 participants
<b>Extra Care Site 2<sup>29</sup></b>	43% 1 Factor 7/9 participants	46% 8/9 participants
<b>Extra Care Site 3</b>	62% 3 Factors 9/14 participants	53% 14/14 participants
<b>Extra Care Site 4</b>	62% 2 Factors 6/9 participants	54% 8/9 participants
<b>Extra Care Site 5</b>	62% 2 Factors 15/21 participants	54% 19/21 participants

<sup>29</sup> The ‘Best Fit’ provides lower explicable variance than Single factor because it was based on a search for two factors but excluded the second factor because it did not have at least two significant loadings which resulted in the sorts of two participants being non-significant whereas the sort of only one participant was not significant in the single centroid solution.

For the Combined Extra Care participants the single centroid solution accounts for 49% of the variance in the results with 63 out of 68 sorts loading on this with at least a 0.5 level of significance. This compares favourably with the Combined Extra Care 3 Factor solution that accounted for 56% of the variance in the sorts of participants, but did not incorporate the sorts of 29 of the 68 participants because thirteen results were confounded by being significant for more than one factor and sixteen were non-significant at the 0.5 significance level.

Table 6B.2 shows the comparison of the percentage of variance explained by the initial Retirement Housing site solutions and with the single centroid results for each site.

**Table 6B.2: Retirement Housing Comparison of Explicable Variance from ‘Best Fit’ and Single Factor Solutions**

	<b>Initial Retirement Housing Factor Solution</b>	<b>Single Centroid Results</b>
<b>Retirement Housing Combined</b>	52% 4 Factors 95/157 participants	41% 135/157 participants
<b>Retirement Housing Site A</b>	52% 2 Factors 8/10 participants	47% 10/10 participants
<b>Retirement Housing Site B</b>	50% 3 Factors 14/18 participants	41% 17/18 participants
<b>Retirement Housing Site C</b>	53% 2 Factors 7/9 participants	48% 8/9 participants
<b>Retirement Housing Site D</b>	54% 3 Factors 12/16 participants	46% 15/16 participants
<b>Retirement Housing Site E</b>	54% 2 Factors 6/9 participants	45% 8/9 participants
<b>Retirement Housing Site F</b>	49% 3 Factors 15/21 participants	39% 15/21 participants
<b>Retirement Housing Site G</b>	46% 2 Factors 11/13 participants	41% 11/13 participants
<b>Retirement Housing Site H</b>	56% 3 Factors 10/14 participants	47% 13/14 participants
<b>Retirement Housing Site I</b>	49% 3 Factors 7/10 participants	40% 8/10 participants
<b>Retirement Housing Site J</b>	60% 4 Factors 20/24 participants	47% 22/24 participants
<b>Retirement Housing Site K</b>	47% 2 Factors 10/13 participants	42% 12/13 participants

For the Combined Retirement Housing participants the single centroid solution accounts for 41% of the variance in the results with 135 out of 157 sorts loading on this with at least a 0.5 level of significance. This also compares favourably with the Combined Retirement Housing results that found four Factors and accounted for 52% of the variance in the sorts of participants, but did not take account of the sorts of 62 of the 157 participants because seven results were confounded by being significant for more than one factor and fifty five were non-significant at the 0.5 significance level.

Although there is a reduction in the explicative value of the single centroid results compared with the solutions that sought to identify the maximum number of distinct perspectives, the single centroid results do still provide a credible presentation of overall opinion. Retirement Housing Site F is the only situation where the percentage explication of under 40% yet Kline (1994) suggested that anything in the region of 35-40% or above would ordinarily be considered a sound solution.

It is interesting to note that, regardless of whether there are multiple Factors or just a single perspective and irrespective of the numbers of participants whose sorts are included on a combined or case by case basis, the percentage explication is generally lower for Retirement Housing than for Extra Care, which suggests there may be more dissonance and a greater variety of views about what the priorities of Retirement Housing should be than is the case for Extra Care. It is interesting to note that the single centroid solution does not diminish the percentage explication as much at some sites compared with others and the differing degrees of diversity of perspective between sites will be considered further in Chapter 7.

### **6B.3 Comparison of Views of Residents with Others**

Many of the previous studies that have deployed Q methodology to study housing and care environments have done so to understand and compare the priorities, preferences and perspectives of the residents in these settings with those of other stakeholders (e.g. Ramlo and Berit, 2013; Van Dijk et al, 2015; Labbé et al, 2016; Grimshaw et al, 2017; Ludlow et al, 2019). As noted in Section 4C.3 above, many of these studies sought to combine the views and Q sorts of more than one type of participant into a single study, whereas Watts and Stenner (2012, p54) are clear that if the research question is considering the views of two or more distinct groups then separate studies are needed in order to be able to understand and appreciate the perspectives of each group. However, if the studies use the same Q Set, the results from the different constituencies of participant may subsequently be subject to comparison to identify issues of contention and consensus between the different groups as was the case in the study by Van Dijk et al (2015).

The comparison of the views of residents of Retirement Housing or Extra Care with the perspectives and priorities of others is not the primary purpose of my research. However, given the tendency, noted in Section 1C.2 above, for providers and professionals to claim to speak on behalf of and to be able to represent the views of residents without necessarily engaging with and listening to their views, I thought it would be an interesting aside and adjunct to my study to consider how close the alignment was between the views of other stakeholders about the



priorities of residents and the views of residents themselves. Therefore, as well as engaging with a P Set of 68 resident participants from Extra Care and 157 resident participants from Retirement Housing sites, I also recruited four additional small P Sets of non-resident participants for Extra Care and three additional P Sets for Retirement Housing.

For Extra Care the comparator P Sets were formed from:

- Local 'On-Site' Staff. These were staff members who were present at the study sites when resident participants were completing the Q sorts (5 x Extra Care Site Managers; 5 x Assistant Extra Care Site Managers; 4 x Care Workers; 1 x Site Administrative Assistant; 1 x Cleaner)
- Extra Care Site Managers. Managers from 12 other Extra Care sites not included in the study (some with care provided by Housing 21 and some with care provided by another organisation).
- Extra Care Senior Managers. Housing 21's Chief Operations Officer, Extra Care Director, 3 Regional Heads of Extra Care, Extra Care Business Administrator and Extra Care HR Business Partner.
- External Opinion Shapers. A purposeful but limited selection of professional, policy and provider participants who would be regarded as key influencers in the field of Extra Care from beyond Housing 21. The members of this P Set were: Michael Vogues – Director of ARCO (Associated Retirement Community Operators); John Galvin – Chief Executive of Elderly Accommodation Counsel; Jeremy Porteus – Chief Executive of Housing Learning and Improvement Network; Lord Richard Best OBE – Founder and Co-Chair of All Party Parliamentary Group on Housing and Care for Older People; Darrell Smith – Specialist Housing Lead at Ministry of Housing Communities and Local Government; Jane Ashcroft CBE – Chief Executive of Anchor Hanover.

For Retirement Housing the comparator P Sets were formed from:

- Local 'On-Site' Staff. These were staff members who were present at the study sites when resident participants were completing the Q sorts (11 x Court Managers; 1 x Assistant Court Manager; 2 x Retirement Housing Managers; 2 x Court Cleaners)
- Retirement Housing Senior Managers. Housing 21's Retirement Housing Director, 4 Heads of Retirement Housing, 2 Retirement Housing Area Managers and Retirement Housing HR Business Partner.
- External Opinion Shapers. A purposeful but limited selection of professional, policy and provider participants who would be regarded as key influencers in the field of Retirement Housing from beyond Housing 21. The members of this P Set were: John Galvin – Chief Executive of Elderly Accommodation Counsel; Jeremy Porteus – Chief Executive of Housing Learning and Improvement Network; Lord Richard Best OBE – Founder and Co-Chair of All Party Parliamentary Group on Housing and Care for Older People; Darrell Smith – Specialist Housing Lead at Ministry of Housing Communities and Local Government; Jane Ashcroft CBE – Chief Executive of Anchor Hanover; Yvonne Castle – Chief Executive of Johnnie Johnson Housing Association; and Rebecca Mollart – Chief Executive of EROSH.

Single centroid ‘best fit’ perspectives were identified for each of these non-resident constituencies of participants for Extra Care and for Retirement Housing and details shown in Appendix 17. The results of these assessments along with the Combined Single Centroid perspectives for residents from Extra Care and Retirement Housing were treated as arrays and entered into PQ Method to test the correlation between the perspectives of the non-resident groups against the residents’ position.

Table 6B.3 shows the correlations for Extra Care and Table 6B.4 shows the correlations for Retirement Housing.

**Table 6B.3: Correlation of Extra Care Single Factor Arrays from Residents and Others**

	Residents	Site Staff	Managers of Other Sites	Senior Managers	External
<b>Combined EC Resident Perspective</b>	100	95	91	90	81

**Table 6B.4: Correlation of Retirement Housing Single Factor Arrays of Residents and Others**

	Residents	Site Staff	Senior Managers	External
<b>Combined RH Resident Perspective</b>	100	92	86	84

These tables show that the degree of correlation between the perspectives produced by the other constituencies with the views and priorities of residents diminishes as these other groups become more distant and remote from the residents. The strongest correlations are provided by the staff who see and know the residents at each specific site, followed by staff at other sites and then the senior management and the external opinion shapers appeared to have the lowest correlation with the residents’ perspective.

The correlations of site staff and senior managers with the perspectives of residents were higher for Extra Care than Retirement Housing which might be an indication that Housing 21’s Extra Care proposition is clearer for both residents and staff than is the case for its service offer in respect of Retirement Housing. However, the correlation of the views of external opinion shapers with the views of Housing 21’s Extra Care residents is noticeably weaker, possibly indicating that they may not be as familiar with the specific nature of Housing 21’s Extra Care and they may be influenced by the fact that there are a variety of models of Extra Care provision that all use the same descriptor. The external view of Retirement Housing is closer to the degree of correlation achieved by senior managers within Housing 21 suggesting that Housing 21’s Retirement Housing offer whilst more variable may nevertheless be closer to the generic conceptions of what Retirement Housing includes and provides.

- **Comparison of Arrays**

As well as considering the overall correlation between the perspectives of others against the view from residents it is also possible to consider and compare the factor arrays produced by each group to understand which statements which were prioritised differently by particular constituencies of participants.

Table 6B.5 shows the scores for the arrays produced by residents and others for Extra Care and Table 6B.6 shows the scores for the arrays from residents and other for Retirement Housing.

Where the statement scores from other groups differ from the priorities of residents by two or more positions these are shown in green if scored more positively and in red if lower. This shows that for Extra Care the staff on site had 6 statements where there was a difference of two or more positions from the resident perspective and this increased to 9 for managers from other sites, 12 for senior managers and 18 for external opinion shapers which confirms the indication that those more distant (physically but possibly also socially) from the sites are less likely to aligned in their views and understanding of the residents' priorities and perspectives. For Retirement Housing the same pattern is repeated with staff on site having a closer alignment than the senior managers or external opinion shapers, but there are also more statements where the perspectives differed by two or more positions indicating that the views and perspective of Retirement Housing residents are more difficult to assess.

**Table 6B.5: Extra Care Single Factor Array Scores for Residents and Others**

		EC Residents	EC Site Staff	EC Other Sites	EC Senior Man.	EC External
1	A court manager to turn to if you need help and advice	4	4	6	3	6
2	A resident manager or warden who lives on-site	-3	-4	-2	-3	-1
3	A court manager who is only employed on a part-time basis	-4	-4	-4	-4	-4
4	Close to shops, amenities and transport	0	0	-1	0	1
5	No need to worry about maintenance and repairs	2	2	0	2	3
6	Repairs or problems are addressed and fixed quickly	1	3	3	4	0
7	The appearance of the Court creates a good impression	1	0	2	-1	0
8	Companionship of neighbours so you are never lonely	0	1	1	2	5
9	Use of a communal lounge and other shared facilities	0	-1	0	0	1
10	Peace of mind that comes from being looked after	3	3	2	4	0
11	Living around people of a similar age and outlook	-1	0	-1	-1	-2
12	Occupancy restricted to only retired people aged over 65	-3	-3	-4	-3	-2
13	Residents are able to have dogs, cats or other pets	-2	-2	-1	0	-1
14	Having security of tenure	2	0	-2	2	3
15	A communal laundry room with washers and dryers	0	-1	0	-1	-3
16	An effective and efficient heating and hot water system	2	1	1	2	-1
17	Feeling safe and secure	6	6	6	6	4
18	A garden or balcony so you can sit out in private	-1	-1	0	-1	2
19	Social events and activities to get involved in	1	2	2	1	1
20	Availability of a good internet connection and/or wifi	-3	-3	-2	-2	-1
21	Pull-cord or pendant to summon help in an emergency	5	5	4	4	0
22	Sufficient car parking spaces	-2	-2	-1	0	-2
23	Community spirit and friendship with people of similar age and outlook	0	0	0	0	1
24	You have your own home with your own front door	4	4	4	2	5
25	In a nice area with attractive surroundings	0	0	0	-1	0
26	Being seen as a form of care home	-5	-6	-6	-5	-6
27	Freedom to live as you choose: no requirement to join in or conform	3	1	3	3	4
28	Independent living	3	3	3	1	2
29	Able to have your say and raise matters with senior management	1	2	1	3	0
30	Residents are engaged and able to exercise choice and control	1	3	2	3	1
31	Residents are treated with dignity and respect	5	5	5	6	3
32	Some other residents behave badly	-6	-6	-5	-6	-6
33	Residents who take control and assume responsibility for organising things	-2	-3	-3	-4	-2
34	People don't respect privacy or confidentiality	-5	-5	-6	-6	-5
35	Gossip spreads quickly	-6	-5	-5	-5	-4
36	Residents with dementia or who need to be looked after	-2	-2	-3	-3	-4
37	Living in close proximity to others in a compact community	-3	-2	-3	-2	-3
38	Small flats	-4	-4	-4	-4	-5
39	Properties and facilities that are modern and well designed	-1	0	1	0	-1
40	Buildings and gardens are kept clean and tidy	0	2	2	1	2
41	Contemporary kitchens and bathrooms	-1	-2	-2	0	0
42	Checks on fire, electrical, gas, asbestos and water safety	2	1	-1	-2	-3
43	Everyone is kept informed and up to date about local plans and activities	0	0	1	1	1
44	Information about costs and charges is correct, clear and comprehensive	1	1	0	1	2
45	Wide doors, that are easy to open, for people with reduced mobility	3	1	1	0	0
46	A reliable lift	2	2	3	1	3
47	A suitable storage area for buggies and other large items	-1	-1	-1	-1	1
48	Good staff who provide consistency of service	4	4	5	5	4
49	Common lounge used by external organisations and groups	-4	-3	-3	-3	-3
50	Guest room available for visitors	-1	-1	-1	-2	-1
51	Care staff on-site 24 hours 7 days a week if needed (EC)	6	6	4	5	6
52	An on-site restaurant (EC)	1	1	1	1	2
53	Hairdressing salon on-site (EC)	-1	-1	0	-1	-2
54	An accessible bath for those that want or need it (EC)	-2	-1	-2	-2	-1
<b>Number of Statements with difference of 2 or more from Residents' Score</b>			<b>6</b>	<b>9</b>	<b>12</b>	<b>17</b>

**Table 6B.6: Retirement Housing Single Factor Array Scores for Residents and Others**

		RH Residents	RH Site Staff	RH Senior Managers	RH External
1	A court manager to turn to if you need help and advice	6	5	4	4
2	A resident manager or warden who lives on-site	-2	-3	-3	-1
3	A court manager who is only employed on a part-time basis	-4	-4	-3	-4
4	Close to shops, amenities and transport	2	0	4	2
5	No need to worry about maintenance and repairs	3	4	3	5
6	Repairs or problems are addressed and fixed quickly	3	4	5	5
7	The appearance of the Court creates a good impression	0	1	0	1
8	Companionship of neighbours so you are never lonely	1	2	1	0
9	Use of a communal lounge and other shared facilities	0	1	-1	0
10	Peace of mind that comes from being looked after	2	0	0	0
11	Living around people of a similar age and outlook	0	-1	-2	-2
12	Occupancy restricted to only retired people aged over 65	-2	-2	-2	-3
13	Residents are able to have dogs, cats or other pets	-3	-1	-2	-2
14	Having security of tenure	3	3	2	4
15	A communal laundry room with washers and dryers	2	0	-1	-1
16	An effective and efficient heating and hot water system	4	2	5	1
17	Feeling safe and secure	6	6	6	6
18	A garden or balcony so you can sit out in private	-2	-2	0	-2
19	Social events and activities to get involved in	-1	1	2	0
20	Availability of a good internet connection and/or wifi	-2	-3	-2	-1
21	Pull-cord or pendant to summon help in an emergency	4	4	2	1
22	Sufficient car parking spaces	-1	-1	1	1
23	Community spirit and friendship with people of similar age and outlook	0	2	3	0
24	You have your own home with your own front door	5	3	3	3
25	In a nice area with attractive surroundings	1	-1	0	1
26	Being seen as a form of care home	-5	-6	-6	-6
27	Freedom to live as you choose: no requirement to join in or conform	3	3	1	2
28	Independent living	4	5	2	3
29	Able to have your say and raise matters with senior management	1	0	0	-2
30	Residents are engaged and able to exercise choice and control	0	2	1	1
31	Residents are treated with dignity and respect	5	6	6	6
32	Some other residents behave badly	-6	-6	-6	-6
33	Residents who take control and assume responsibility for organising things	-3	-4	-4	-2
34	People don't respect privacy or confidentiality	-5	-4	-4	-5
35	Gossip spreads quickly	-6	-5	-5	-4
36	Residents with dementia or who need to be looked after	-2	-2	-3	-5
37	Living in close proximity to others in a compact community	-3	-2	-3	-1
38	Small flats	-4	-5	-5	-4
39	Properties and facilities that are modern and well designed	0	0	1	2
40	Buildings and gardens are kept clean and tidy	1	1	2	3
41	Contemporary kitchens and bathrooms	-1	-1	0	2
42	Checks on fire, electrical, gas, asbestos and water safety	2	1	-1	0
43	Everyone is kept informed and up to date about local plans and activities	1	-1	-1	-1
44	Information about costs and charges is correct, clear and comprehensive	1	2	1	4
45	Wide doors, that are easy to open, for people with reduced mobility	-1	0	-1	-1
46	A reliable lift	-1	1	4	2
47	A suitable storage area for buggies and other large items	-3	-3	-2	-3
48	Good staff who provide consistency of service	2	3	3	3
49	Common lounge used by external organisations and groups	-4	-3	-4	-3
50	Guest room available for visitors	-1	-2	-1	-3
<b>Number of Statements with difference of 2 or more from Residents' Score</b>			<b>12</b>	<b>17</b>	<b>22</b>

- **Statements Susceptible to Difference of Perspective**

Some statements appeared to be particularly susceptible to differences in the prioritisation by residents and by others.

#### **#42 Checks on fire, electrical, gas, asbestos and water safety**

Statement #42 was ranked lower by all other constituencies of participant for both Extra Care and Retirement Housing than by the resident participants. Although for on-site staff the difference was just one place, there was a greater disparity for others. Staff, managers and external opinion shapers are almost certainly aware of the importance of safety checks, but seem to have underestimated the degree of assurance these checks provide to residents of both Retirement Housing and Extra Care. There is almost unanimous recognition that Statement #17 (Feeling safe and secure) is a top priority, but aspects of property safety and compliance seem to be regarded by others as being more of a regulatory requirement rather than as a matter of significance for residents. None of the Sites are high-rise properties, but the fire at Grenfell Tower in June 2017, a year before the research was undertaken, may have contributed to a heightened awareness and concern of residents or this may simply be a general reflection of the participants' desire for confidence in the effectiveness with which their landlord is discharging its management and safety responsibilities.

#### **#6 Repairs or problems are addressed and fixed quickly**

Most of the categories of non-resident participants appear to have assumed that having repairs and problems fixed quickly is more important than this appears to have been prioritised by the resident participants from Extra Care and Retirement Housing. The only exception to this is external opinion formers' view of the priorities of residents of Extra Care. The emphasis on the speed of repairs and response assumed by the staff and management of Housing 21 might be a consequence of the emphasis and importance attributed to time based measures of performance rather than the more complex, contingent and subjective assessments of satisfaction that are possibly being made by residents. The overall prioritisation of this statement (by residents and others) is higher for Retirement Housing than Extra Care, which is possibly because repairs are seen as a housing issue whereas the focus of Extra Care is more concerned with care than property matters.

#### **#13 Residents are able to have dogs, cats or other pets**

Overall residents do not welcome pets either in Extra Care (-2) or Retirement Housing (-3). Although Extra Care site based staff seemed to understand this, all other non-resident participants were slightly less negative about this than the residents themselves, but still none rated the ability of residents to have dogs or cats as a positive feature.

#### **#45 Wide doors, that are easy to open, for people with reduced mobility and #46 A reliable lift**

The requirement for a reliable lift (#46) is recognised to be a desirable feature by residents (+2) and given a similar priority by all others constituencies in Extra Care. For Retirement Housing, although a reliable lift is considered to be something that would be seen as being a positive feature by all of the other participants (on-site staff, managers and external opinion shapers) it is given a negative score in the overall assessment of Retirement Housing residents even though this possibly hides differences of perspective between sites that have a lift and those that do not.

There is a consistent view amongst residents and others that having wide doors that are easy to open (#45) is not a priority for Retirement Housing. Although this is seen by others as being slightly more important for people living in Extra Care (+1 for site staff and managers of other sites and 0 for senior managers and external opinion shapers), the actual residents of Extra Care considered this to be a greater priority (+3).

#### **#15 A communal laundry room with washers and dryers**

Although #15 (A communal laundry room with washers and dryers) was not ranked as a particularly important feature for residents of Extra Care (0) the site staff, senior manager and external opinion shapers all assumed that residents of Extra Care would have scored this even lower. The provision of a laundry was seen as more important by Retirement Housing residents (+2), but it was not scored as a positive feature by any of the groups of non-resident Retirement Housing participants. This suggests that even though it is now the norm for households to have their own washing machine, this communal facility is still seen as having more value and relevance by residents than outsiders seem to appreciate.

#### **#30 Residents are engaged and able to exercise choice and control**

It is generally regarded as a good thing for housing and care providers to avoid being too paternalistic and expected that they will engage with residents and allow them scope to exercise choice and control (#30). The view from residents of Extra Care and Retirement Housing, however, does not seem to give this as much of priority as the other groups of participants from within Housing 21 or the Retirement Housing external opinion shapers.

#### **#40 Buildings and gardens are kept clean and tidy**

Having buildings and gardens that are clean and tidy is thought to be much more important by Extra Care site staff, managers of other Extra Care sites and external opinion shapers for both Extra Care and Retirement Housing than the reality of what residents actually think. This difference may be because, for Extra Care residents in particular, their priority is not concerned with the building in which they live and its immediate environment, but with the impact this has on their lifestyle and what it allows them to do or achieve.

- **Characteristics of Others' Perspectives for Extra Care**

In addition to the above general issues of distinction, each of the other groups made particular assumptions about what the priorities and preferences of resident participants would be.

#### **Extra Care Site Staff**

Two specific statements were rated 2 places lower by Extra Care site staff than by residents. These were #14 (Having security of tenure) and #27 (Freedom to live as you choose: no requirement to join in or conform). This suggests that even though Extra Care residents may require more care or support they are still concerned to protect their autonomy and rights of occupation.

#### **Managers of Other Extra Care Sites**

The managers of other Extra Care sites scored #14 (Having security of tenure) 4 places lower than residents. Several of the sites where the other Extra Care managers worked had care provided by third party (i.e. non-Housing 21) providers, as was the case at Site 2, and this may have contributed to a lower score being given to the importance of #51 (Care staff on-site 24 hours 7 days a week if needed) and a higher score to #1 (A court manager to turn to if you need help and advice). The managers of the other Extra Care sites also felt it was more important for the properties to be modern and well-designed (#39) than the residents did, but under-estimated the benefit residents obtained from not having to worry about repairs (#5).

#### **Extra Care Senior Managers**

Senior managers responsible for Extra Care in Housing 21 underestimate the preference of Extra Care residents for #28 (Independent living) and also for #24 (You have your own home with your own front door). This is possible because they consider the care and support aspects of Extra Care are more important than the ability of residents to retain their autonomy and independence. This might also explain why senior managers also rated the importance of the appearance of the court creating a good impression (#7) lower than residents. Senior managers may have a slightly over-inflated view of their own importance by rating #29 (Able to have your say and raise matters with senior management) higher than residents. Senior manager also appeared to have considered #8 (Companionship of neighbours so you are never lonely) to be more of a positive feature than the neutral stance of Extra Care residents, but they also over-emphasised the dislike of #33 (Residents who take control and assume responsibility for organising things). This might indicate that senior managers are not in touch with some of the subtleties and complexities of relationships at play within Extra Care communities.



### **Extra Care External Opinion Shapers**

It is more difficult for external opinion shapers to understand the specific characteristics and positioning of Housing 21's Extra Care settings and hence be able to appreciate the likes and dislikes of residents. The responses of external opinion shapers may therefore reflect a more general assessment from their experience across the extra care sector. One of the key areas of difference in the score of external opinion shapers compared with residents is to assume they want the companionship of neighbours (#8), which was ranked five positions higher than by residents themselves, but the external opinion shapers thought that residents would be less concerned about having peace of mind from being looked after (#10) or feeling safe and secure (#17) than was the case. There appears to have been a tendency for external opinion shapers to over emphasise modern-day desires #20 (Availability of a good internet connection and/or wifi) and #41 (Contemporary kitchens and bathrooms) over the basic comfort and assurance considerations of #21 (Pull-cord or pendant to summon help in an emergency) and #16 (An effective and efficient heating and hot water system). The disapproval shown by some residents towards others with dementia or who need to be looked after appears to have been over-stated (#36), while under estimating the objection to gossip (#35) which residents indicate they consider to be much more problematic.

- **Characteristics of Others' Perspectives for Retirement Housing**

All the non-resident participants for Retirement Housing under rated by two positions the importance to Retirement Housing residents of #24 (You have your own home with your own front door) but also under rated by two position the importance of #10 (Peace of mind that comes from being looked after). This indicates possible lack of appreciation of the importance of the physical property of Retirement Housing being identified by residents as their home, but also the inter-relationship of this with the support and assurance that Retirement Housing provides. All the other participants for Retirement Housing also scored #43 (Everyone is kept informed and up to date about local plans and activities) as -1, whereas residents thought this was important enough to have a positive score (+1).

### **Retirement Housing Site Staff**

Staff at the Retirement Housing sites appear to have under-assessed the importance of being close to amenities shops and transport (#4) and of being in a nice area with attractive surroundings (#25) perhaps because these things are a given and not something that is discussed or easy to change. There appears to also be an inclination to over emphasise the importance of social events and activities (#19), perhaps because these are things that the court staff are often

involved in organising and attend so may feel more committed to them than residents who choose not to attend such events.

### **Retirement Housing Senior Managers**

Retirement Housing senior managers scored #28 (Independent living) as +2 which, as well as being the lowest score for all the other participants, was two positions lower than the +4 rating of Retirement Housing residents. Despite it being a policy position of Housing 21 to maintain the court manager service in Retirement Housing the senior managers rated #1 (A court manager to turn to if you need help and advice) two positions lower than residents. Senior managers also had the highest (although still negative) assessment of the desirability of #3 (A court manager who is only employed on a part-time basis). Senior managers also under estimate the importance of #19 (Pull-cord or pendant to summon help in an emergency).

### **Retirement Housing External Opinion Shapers**

Although it is difficult for external opinion shapers to know the specific likes and dislikes of residents in Housing 21's Retirement Housing, many of the features and services provided are familiar across providers and Housing 21 does not have such a distinct service proposition for its Retirement Housing as does for its Extra Care. However, it may not have been appreciated that it is a distinctive feature of Housing 21's Retirement Housing is that there will always be a court manager and hence #1 (A court manager to turn to if you need help and advice) was scored lower by external opinion shapers than by the residents themselves. External opinion shapers also under estimate the importance to residents of independent living (#28), having freedom to live as they choose (#27) and most significantly being able to have their say and raise matters with senior management (#29).

- **Assessment of Comparisons with Non-Resident Perspectives**

As well as providing an insight into some of the potential misconceptions and assessments of others about what residents of Extra Care and Retirement Housing want and value or don't like about living in this form of housing, this sub-study within the main programme of research has also served to highlight some of the differences between these two forms of provision. It has also indicated that, although there is perhaps less certainty and consistency in the conception of what Retirement Housing is and offers than is the case for Extra Care, the exact nature of the specific Extra Care service provided by Housing 21 may not necessarily as well understood or consistent with the Extra Care services of other providers as might be assumed.

## **Chapter 6 Contribution**

*This chapter has described the three perspectives identified from the 68 Extra Care participants and the four perspectives from the 157 Retirement Housing Participants and considered the correlations with these shown by the perspectives that were also identified on a site by site basis. It demonstrates that whilst there is a significant degree of commonality and consensus, there are also complexities and subtleties in each of the particular patterns of priority and preference that were expressed. Although it is possible to find an overall ranking of priority and preference for each statement, either on an arithmetical or on a single centroid basis, these lose the insights and explicative understanding of micro perspectives that the multi-factor Q studies can provide.*

*The comparison of residents' results with assessments made by on-site staff, more senior managers and external opinion shapers suggests that the further removed people are from the lived experiences of residents the less representative their views are likely to be. This thus emphasises the importance of making the effort to gain a genuine undertaking of the detail and*

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## **Chapter 7**

### **Meso Findings and Provision Comparisons**

*This chapter draws upon the analysis of the Q sorts from Chapter 6 to make comparisons between and across the Extra Care and Retirement Housing sites in order to try to understand the nature and extent of the influence that the context has on the attitudes and opinions expressed. It also seeks to understand which issues are particularly contentious and distinctive for the participants on a site specific basis.*

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## 7A: Site Assessments and Comparisons

The 68 participants for the Extra Care assessment were recruited from 5 Housing 21 Extra Care sites (1-5) and the 157 Retirement Housing participants came from 11 Housing 21 Retirement Housing sites (A-K). Details of the sites are provided in Appendix 5 and they were selected to provide a degree of diversity in terms of location, property characteristics and service characteristics. Although all the sites are of the same genus (i.e. specialised housing for older people), they are divided into two distinct species of Extra Care and Retirement Housing, but even within these categories each site and service does still have its own particular traits and characteristics. The aim of this chapter is to assess the degree and nature of the commonalities and differences between and within the perspectives of participants from each site.

### 7A.1 Correlation and Comparison of Extra Care Sites

Table 7A.1 compares the correlations of the single centroid solutions for Extra Care Sites 1–5 with one another and with the Combined Extra Care single centroid perspective in order to provide an indication of the degree of difference between the common single perspective from each of the Extra Care sites.

**Table 7A.1: Correlation Matrix between Single Centroid Solutions for Extra Care Sites 1-5 and with the Combined Extra Care Single Centroid Perspective**

	Site 1	Site 2	Site 3	Site 4	Site 5
Site 1	100	82	90	85	85
Site 2	82	100	90	88	87
Site 3	90	90	100	91	94
Site 4	85	88	91	100	93
Site 5	85	87	94	93	100
<b>Combined</b>	<b>91</b>	<b>92</b>	<b>97</b>	<b>93</b>	<b>96</b>

Although the single centroid arrays from each of the Extra Care sites have a high degree of correlation with one another they have an even higher correlation with the single centroid position from the Extra Care Combined Study.

Site 1 has the lowest (or joint lowest) correlation with the single centroid arrays from each of the other sites, that suggests the participants from this site were the most different and distinct. Site 1 was the oldest of the five Extra Care sites included in the study (having been built in 2004) and also the smallest with just 38 properties. It is in a particularly rural/village location and the local authority area with the highest proportion of older people in the population of the five Extra Care sites in the study. It had the oldest age profile of participants with all but 3 of the 15 participants in the 85-95 age category and had the highest ratio of care hours/per resident. The care at this site is provided by Housing 21 and has been graded as 'outstanding' by the Care Quality Commission.

Site 2 has the second lowest correlation with the other sites and the lowest correlation (0.82) with Site 1. Site 2 is the only Extra Care site included in the study where care was provided by a third party organisation. It was also the only Extra Care site not to be exclusively for older people and although only one participant was aged under 55, 7 of the 9 participants from this site were aged under 75. It was in an urban location and in the local authority area with the lowest proportion of older people in the population of the five Extra Care sites in the study.

Site 3 had the highest correlation with the Combined Extra Care single centroid array (0.97) and was also the site with the highest correlation with Site 1 and Site 2 (both 0.90). Site 3 is the second smallest site with 60 properties, is located in a market town in a reasonably affluent area and is the second oldest Extra Care site in the study (built in 2011). It is in a local authority area with the second highest proportion of older people in the population of the five Extra Care sites. 9 of the 14 resident participants from Site 3 were aged under 85 and 5 were aged under 75.

Site 4 has the third highest correlation with the Combined Extra Care single centroid array (0.93) and also has an equivalent correlation (0.93) with Site 5. Site 4 was built in 2016 and is in a market town but in a relatively economically deprived area. 5 of the 9 resident participants from Site 4 were aged under 75.

Site 5 has the second highest correlation with the Combined Extra Care single centroid array (0.96) and a strong correlation with Sites 3 (0.94) and 4 (0.93). This is the largest of the sites with 130 properties and the only site to include properties occupied on a shared ownership basis as well as for rent. Site 5 was built in 2016 in an urban location and is in a relatively economically deprived area. It is in a local authority area with the second lowest proportion of older people in the population of the five Extra Care sites in the study, but reflects the national average for the percentage of population aged over 65. Of the 21 resident participants 3 were aged over 85 and 3 were aged under 65.



Whilst it appears that the character and circumstance of the different Extra Care sites may play some part in distinguishing and determining the extent to which the shared view of participants correlate with the single centroid views from other sites or conform to priorities of the Combined Extra Care profile, there is nevertheless still a considerable degree of correlation and alignment of the views from all five of the Extra Care sites.

## **7A.2 Issues of Contention and Consensus for Extra Care Sites**

Although comparison and atomistic assessments of the results from Q studies on an item by item basis is not necessarily compatible with the holistic premise of Q methodology, it does provide an indication of the issues about which there is a general consensus and where there are statements that are considered to be particularly contentious. Figure 7A.1 provides an analysis of the range and positioning of the Factors considered in Chapter 6 (and shown in Appendix 9) from Extra Care Sites 1–5 for each of the 54 statements to allow comparisons to be made between the positioning and range of factor scores within and across the Extra Care sites. The cells in Figure 7A.1 indicate the degree of difference of perspective (i.e. number of places apart from the highest to the lowest factor score for the statement or item in the factor arrays for each of the Factors) with the subscript indicating the lowest and highest scores. Appendix 18 also provides charts showing the distribution of the Factors for each site on a statement by statement basis. This gives an indication of which statements appear to be the most contentious and produce the greatest divergence of perspective at each site and which appear to be less controversial and produce a consensus perspective as well as indicating that the priorities and responses to statements are not necessarily always consistent for every site.

Figure 7A.1: Analysis of Statements of Consensus and Contention for Extra Care Sites 1-5<sup>30</sup>

No.	Statement	Combined	Site 1	Site 2	Site 3	Site 4	Site 5	Difference across Sites 1-5
1	A court manager to turn to if you need help and advice	2 +3/+5	3 +1/+4	- +2	3 +2/+5	1 +5/+6	2 +3/+5	9
2	A resident manager or warden who lives on-site	4 -4/0	2 -3/-1	- +3	3 -3/0	0 -3	1 -3/-2	6
3	A court manager who is only employed on a part-time basis	2 -5/-3	5 -5/0	- -4	2 -6/-4	2 -6/-4	0 -4	9
4	Close to shops, amenities and transport	0 -1	7 -4/+3	- +1	3 -3/0	2 0/+2	3 -2/+1	15
5	No need to worry about maintenance and repairs	3 0/+3	2 +1/+3	- +3	2 +1/+3	5 -1/+4	2 -1/+1	11
6	Repairs or problems are addressed and fixed quickly	4 -1/+3	3 0/+3	- +2	2 +1/+3	1 0/+1	4 -2/+2	10
7	The appearance of the Court creates a good impression	1 0/+1	2 -1/+1	- 0	3 0/+3	1 -1/0	4 -1/+3	10
8	Companionship of neighbours so you are never lonely	4 -2/+2	5 -1/+4	- +1	2 -1/+1	0 0	2 -2/0	9
9	Use of a communal lounge and other shared facilities	4 -2/+2	5 -2/+3	- 0	2 -1/+1	3 0/+3	2 -2/0	12
10	Peace of mind that comes from being looked after	3 +1/+4	3 +1/+4	- +2	4 0/+4	2 -1/+1	4 -1/+3	13
11	Living around people of a similar age and outlook	3 -2/+1	4 -2/+2	- -2	5 -1/+4	4 -2/+2	1 -1/0	14
12	Occupancy restricted to only retired people aged over 65	3 -4/-1	1 -3/-2	- -5	1 -3/-2	7 -3/+4	3 -5/-2	12
13	Residents are able to have dogs, cats or other pets	5 -4/+1	4 -5/-1	- -2	5 -3/+2	5 -6/-1	5 -4/+1	19
14	Having security of tenure	4 0/+4	6 0/+6	- +4	7 -1/+6	3 0/+3	5 -1/+4	21
15	A communal laundry room with washers and dryers	3 -2/+1	4 -3/+1	- +1	8 -3/+5	0 -1	3 -2/+1	15
16	An effective and efficient heating and hot water system	3 +2/+5	2 +1/+3	- +2	0 +3	1 0/+1	3 +1/+4	6
17	Feeling safe and secure	4 +2/+6	5 +1/+6	- +4	1 +4/+5	3 +3/+6	1 +5/+6	10
18	A garden or balcony so you can sit out in private	2 -2/0	4 -2/+2	- -1	3 -3/0	2 -3/-1	1 -1/0	10
19	Social events and activities to get involved in	4 -1/+3	5 -3/+2	- 0	2 0/+2	1 +1/+2	4 0/+4	12
20	Availability of a good internet connection and/or wifi	4 -4/0	8 -6/+2	- -3	4 -2/+2	3 -3/0	2 -2/0	17
21	Pull-cord or pendant to summon help in an emergency	3 +2/+5	4 +2/+6	- +3	4 +2/+6	2 +2/+4	6 0/+6	16
22	Sufficient car parking spaces	4 -3/+1	2 -2/0	- 0	4 -4/0	1 -2/-1	6 -3/+3	13
23	Community spirit and friendship with people of similar age and outlook	2 0/+2	5 -3/+2	- 0	3 0/+3	1 +1/+2	3 0/+3	12
24	You have your own home with your own front door	3 +3/+6	1 +2/+3	- +6	5 +1/+6	5 +1/+6	2 +4/+6	13
25	In a nice area with attractive surroundings	2 -1/+1	2 0/+2	- -1	2 -1/+1	3 -2/+1	1 +1/+2	8
26	Being seen as a form of care home	1 -4/-3	1 -3/-2	- -5	2 -4/-2	2 -6/-4	0 -5	5
27	Freedom to live as you choose: no requirement to join in or conform	3 +1/+4	4 0/+4	- +1	5 +1/+6	2 +1/+3	4 +1/+5	15
28	Independent living	6 0/+6	6 -1/+5	- +1	6 0/+6	3 +2/+5	4 +2/+6	19

<sup>30</sup> Cells indicate the degree of difference of perspective (i.e. number of places apart in factor scoring grid) with subscript of lowest and highest scores

No.	Statement	Combined	Site 1	Site 2	Site 3	Site 4	Site 5	Difference across Sites 1-5
29	Able to have your say and raise matters with senior management	3 0/+3	1 -1/0	- 0	3 -1/+2	6 -1/+5	4 0/+4	14
30	Residents are engaged and able to exercise choice and control	3 -1/+2	5 -1/+4	- 0	1 -1/0	0 0	6 -2/+4	12
31	Residents are treated with dignity and respect	1 +4/+5	3 +2/+5	- +5	2 +3/+5	1 +4/+5	3 +1/+4	9
32	Some other residents behave badly	1 -6/-5	0 -6	- -6	2 -6/-4	0 -5	1 -6/-5	3
33	Residents who take control and assume responsibility for organising things	4 -3/+1	3 -5/-2	- -3	4 -4/0	5 -2/+3	4 -2/+2	16
34	People don't respect privacy or confidentiality	1 -6/-5	0 -4	- -4	1 -6/-5	1 -5/-4	0 -6	2
35	Gossip spreads quickly	1 -6/-5	2 -6/-4	- -6	1 -6/-5	2 -6/-4	2 -6/-4	7
36	Residents with dementia or who need to be looked after	3 -3/0	4 -1/+3	- -3	2 -4/-2	3 -2/+1	5 -3/+2	14
37	Living in close proximity to others in a compact community	2 -3/-1	3 -3/0	- -3	3 -4/-1	1 -3/-2	1 -3/-2	8
38	Small flats	2 -6/-4	2 -6/-4	- -4	1 -5/-4	1 -5/-4	2 -4/-2	6
39	Properties and facilities that are modern and well designed	1 -1/0	3 -1/+2	- -1	1 -1/0	1 -2/-1	1 0/+1	6
40	Buildings and gardens are kept clean and tidy	1 -1/0	2 -1/+1	- -1	1 -1/0	0 +1	2 0/+2	5
41	Contemporary kitchens and bathrooms	2 -2/0	5 -4/+1	- -2	2 -1/+1	2 -2/0	0 -1	9
42	Checks on fire, electrical, gas, asbestos and water safety	1 +1/+2	2 +1/+3	- +1	1 +1/+2	3 +1/+4	3 0/+3	9
43	Everyone is kept informed and up to date about local plans and activities	2 0/+2	2 -1/+1	- +1	3 -2/+1	3 -1/+2	5 0/+5	13
44	Information about costs and charges is correct, clear and comprehensive	4 -2/+2	3 -2/+1	- +3	2 0/+2	3 0/+3	2 -1/+1	10
45	Wide doors, that are easy to open, for people with reduced mobility	3 0/+3	2 0/+2	- +2	6 -2/+4	1 +2/+3	3 0/+3	12
46	A reliable lift	6 0/+6	8 -3/+5	- +5	4 0/+4	2 +1/+3	6 -1/+6	20
47	A suitable storage area for buggies and other large items	2 -2/0	0 -1	- 0	3 -2/+1	1 -1/0	4 -4/0	8
48	Good staff who provide consistency of service	1 +3/+4	1 +4/+5	- +4	4 -1/+3	2 +2/+4	2 +2/+4	9
49	Common lounge used by external organisations and groups	2 -4/-2	3 -4/-1	- -2	2 -4/-2	1 -3/-2	2 -3/-1	8
50	Guest room available for visitors	2 -3/-1	2 -1/+1	- -2	3 -2/+1	1 -3/-2	2 -2/0	8
51	Care staff on-site 24 hours 7 days a week if needed (EC)	2 +4/+6	1 +5/+6	- +6	5 +1/+6	4 +2/+6	4 +2/+6	14
52	An on-site restaurant (EC)	4 -1/+3	3 0/+3	- -1	5 -1/+4	1 0/+1	2 -1/+1	11
53	Hairdressing salon on-site (EC)	2 -2/0	3 -2/+1	- -1	2 -3/-1	1 -1/0	3 -3/0	9
54	An accessible bath for those that want or need it (EC)	2 -3/-1	3 -3/0	- -1	2 -3/-1	3 -4/-1	5 -4/+1	13
	<b>Total Difference for Site (Number of Factors)</b>	<b>144 (3)</b>	<b>170 (3)</b>	<b>-</b>	<b>159 (3)</b>	<b>114 (2)</b>	<b>152 (3)</b>	

- **Consensus Statements**

There are six statements where the difference in statement scores between perspectives at each site is less than 3 positions apart for all Extra Care sites, indicating that there is a general uniformity of view about these issues within, but not necessarily across, each of the sites<sup>31</sup>. These are:

**#26 (being seen as a form of care home)**

Although there is consensus about this at each site, there are differences in the degree of negativity about this proposition between the sites. Extra Care Sites 2, 4 and 5 the median score was as -5 but at Sites 1 and 3 the median was positioned between -2 and -3.

**#32 (Some other residents behave badly)**

**#34 (People don't respect privacy or confidentiality)**

**#35 (Gossip spreads quickly)**

These three statements consistently have the lowest scores (between -6 and -4) for all factors and at all sites, indicating that there is a strong shared dislike of the potential erosion of personal boundaries that can occur in an Extra Care setting.

**#38 (Small flats)**

This is also seen as a highly negative feature that is scored between -6 and -4 by all factors at all sites with the exception of Site 5 Factor 3 (Safe, Independent, Informed and Social), even though this Factor considered having their own home was of particular importance.

**#40 (Buildings and gardens are kept clean and tidy)**

This is the only consensus statement that does not express what residents do not like or do not want from Extra Care. There appears to be a general attitude of neutrality about this that is neither actively liked or disliked and hence it is scored between -1 and +2 across all factors at all sites.

- **Contentious Statements**

There are four statements where there is a difference in scores between perspectives at each site of 3 or more positions at all Extra Care sites (except Site 2 where only one perspective was identified), indicating that these are consistently contentious issues about which there are divided opinions.

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<sup>31</sup> The standard adopted for an item or statement to be considered a 'consensus statement' in the Q studies for Extra Care and Retirement Housing (in Chapter 6) was for its position in the factor array of all Factors to be less than 2 positions apart. However, for the purpose of demonstrating uniformity of consensus in each of the case study sites a broader definition of consensus has been applied that permits the positioning to be two or less positions apart for it to be deemed a consensus. This reflects the fact that the smaller number of participants in the site case studies provide scope for greater variance between the Factors than was the case in the Combined Study.

These are:

### **#13 (Residents are able to have dogs, cats or other pets)**

There is a generally a negative attitude towards ability of residents to keep pets, with only Site 3 Factor 2 (Community Spirit with Freedom and Independence - +2) and Site 5 Factor 1 (Freedom and Security of Home with Mobility - +1) giving this a positive score. However, there appear to be some perspectives at each site that are particularly negative about permitting pets in Extra Care settings and hence this appears to be a consistently controversial issue that is perhaps reflective of a general division in society between 'pet people' and 'non-pet people'.

### **#14 (Having security of tenure)**

This is a top priority (+6) for Site 1 Factor 2 (Security of Tenure and Independence) and Site 3 Factor 3 (Security of Tenure in Own Home with Lift and Laundry) and otherwise a generally positive feature there is one Factor at each site that regards this a low priority resulting in it having a score of 0 or -1. The Factors that do not regard having security of tenure as a priority may be as a consequence of prioritising personal safety and being looked after more than property security or alternatively simply be because this is taken for granted.

### **#28 (Independent living)**

At each site there is a perspective that regards independence as being fundamentally important (scored as either +6 or +5), but there are also perspectives at every site that see this as having little or no importance. It is not clear whether this division is attributable to a particular dependence on care and support or is just a consequence of a particular attitude of mind and view about what independence entails.

### **#33 (Residents who take control and assume responsibility for organising things)**

For some perspectives having the opportunity for residents to organise things for themselves is moderately appealing (Site 4 Factor 1: Living Independently in Your Own Home +3 and Site 5 Factor 3: Safe, Independent, Informed and Social +2), but for other perspectives this is perceived negatively, perhaps as a sign of unwelcome interference from others and loss of autonomy.

The variations in the total of differences in positions across all statements between sites is not seen as being of particular significance as it is likely to have been influenced, at least in part, by the number of factors identified, with more perspectives naturally giving greater scope for a divergence of views. Analysis (such as Appendix 18) helped to indicate where there are differences in the profile and nature of attitudes and issues that are particularly contentious or distinctive at each Extra Care site.

### **Contentious or Distinctive Perspectives for Site 1**

Site 1 Factor 3 has a lower desire for a court manager (#1) than any other perspective from Extra Care sites and does not appear to share the concern shown by other Extra Care perspectives about the court manager only being employed on a part-time basis (#3). This might be a

consequence of the higher incidence of care at Site 1 and older participants who are possibly more inclined to look to the care staff rather than the court manager for help or support and would be more concerned to ensure that there is full-time (24/7) care than a court manager.

There is a significant difference of opinion at Site 1 regarding the importance of being close to shops, amenities and transport (#4) with Factor 1 ranking this as +3, which is more important than any other Extra Care site, while Factor 3 rated this as -4, which is lower than any of the other Extra Care site. This might be a consequence of Site 1 being in a very rural location, which can either be a cause of concern for those who want access to amenities but do not have the means to get to them or accepted as a consequence of the setting and not considered to be a problem or possibly even an advantage. There also appears to be a particular divide at Site 1 between Factor 1 and Factor 3 regarding the importance of companionship of neighbours (#8), having access to a communal lounge (#9), community spirit and friendship (#23) and having social events to get involved in (#19). This might also reflect differences in attitudes and views about the merits of living in a self-contained community and those who would prefer to maintain outside interests and connections.

The two most contentious issues, with the greatest differences between perspectives at Site 1, are the availability of a good internet connection and/or wifi (#20) and the provision of a reliable lift (#46). Both of these matters appear to relate to differences in the circumstances and preferences of the participants rather than being necessarily attributable to the location or the nature of the facilities at Site 1.

### **Distinctive Perspectives for Site 2**

Because only one perspective was identified at Site 2 it is not possible to comment on any divergence of views or identify statements that appear to be contentious, but the perspectives of Site 2 can still be compared with the prioritisation and position of statements from other Extra Care sites. The scores from Site 2 for living around people of a similar age and outlook (#11) and occupancy being restricted to only older people aged over 65 (#12) are both the lowest level of any perspective from other Extra Care sites. These low scores may be a consequence of Site 2 being a mixed age Extra Care development and the only Extra Care site where there was a participant aged under 55 as well as two others aged under 65. This age profile<sup>32</sup> may also have had an influence on the low score (-5) for being seen as a form of care home (#26), the importance (+6) of having your own home with your own front door (#24) and preference for correct, clear and comprehensive information about costs and charges (#44).

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<sup>32</sup> The influence of age on perspectives is also considered further in Section 8C

Site 2 has most of its living accommodation on 3 upper floors, so it has a high dependence on lifts for access and there had also been a recent instance of one of the lifts at the site being out of action for a period, which might have influenced the high priority given to the need for a reliable lift (#46). The restaurant at Site 2 was operated by an external provider and appeared to be struggling to maintain a viable service which may have influenced views and resulted in a low priority for the provision of an on-site restaurant (#52).

### **Contentious or Distinctive Perspectives for Site 3**

The most contentious statement amongst the perspectives at Site 3 concerns the availability of a communal laundry (#15), with Factor 3 rating this highly (+5) and considerably above highest factor score from any of the other sites (+1), whereas Factor 2 from Site 3 had the joint lowest score (-3) for the laundry facility. There does not appear to be anything specific about Site 3 or its laundry facilities to prompt this particularly wide spread of opinions. Site 3 is in a reasonably affluent area which might influence the views of people who would prefer to have their own washing machine in their property, but this does not account for the exceptionally positive view of a communal laundry facility by Factor 3. There is also a significant divergence of priorities between the same two sets of perspective regarding security of tenure (#14) with this being a priority for Factor 3 (+6) but not for Factor 2 (-1). This suggests that the differences of views may be primarily linked to the particular characteristics of the residents rather than being attributable to the site and service context.

The provision of an on-site restaurant (#52) has the highest score (+4) from Site 3 Factor 1 of any Extra Care site and it was noted that a number of the participants at Site 3 had completed the study on their way either to or from the restaurant. Site 3 Factor 2 ranked living around people of a similar age and outlook (#11) higher than any other Extra Care site factor, and also ranked the ability of residents to have dogs, cats or other pets (#13) higher (+2) than any other Extra Care site perspective suggesting that (for some participants at least) Site 3 was the most pet friendly of the Extra Care sites.

### **Contentious or Distinctive Perspectives for Site 4**

Site 4 has the lowest level of divergence of perspective with just six statements having a difference of position of 5 or more places. The statement with the greatest divergence of perspective within Site 4 but also in comparison with the factors identified at other Extra Care sites concerns occupancy only being restricted to retired people aged over 65 (#12). Site 4 Factor 2 rates this as +4, whereas the highest it is ranked by any other Extra Care site perspective is -2. Whilst Site 4 does have an age criteria, this only ensures that residents are aged 55 years or over and it appears that some residents associated with Factor 2 from Site 4 consider that this age

criterion level should be higher and that they were also in favour (+2) of living around others of a similar age and outlook (#11).

Other divergences of view amongst the participants from Site 4 appeared to be primarily related to the importance of having your own home with its own front door (#24), the ability to raise matters with senior management in order to have your say (#29) and the opportunity for residents to take charge and assume responsibility for organising things (#33). These distinctions seems to be linked to the personal circumstances and characteristics of the participants (particularly those who were members of the social committee of Site 4 and who worked with the manager to organise events) rather than with the context, facilities and specification of Site 4.

#### **Contentious or Distinctive Perspectives for Site 5**

Site 5 Factor 1 has the highest preference for an accessible bath (#54), a reliable lift (#47) and sufficient car parking (#22) of any of the Extra Care site perspectives. Site 5 Factor 3 has the highest desire to be kept informed and up to date about local plans and activities of any of the perspectives from other Extra Care sites. Both these positions appear to be linked to the personal characteristics of the participants rather as a consequence or response to the specific features or circumstances of the site.

#### **Summary Assessment**

It appears that the distinctiveness and contention of the perspectives of participants both within and between Extra Care sites are a consequence of a combination and interaction of site circumstances and personal preferences.



### 7A.3 Correlation and Comparison of Retirement Housing Sites

Table 7A.2 compares the correlations of the single centroid solutions for Retirement Housing Sites A–K with one another and with the Combined Retirement Housing single centroid perspective in a correlation matrix to indicate the degree of difference between the single perspectives from each of the Retirement Housing sites.

**Table 7A.2: Correlation Matrix between Single Centroid Solutions for Retirement Housing Sites A-K and the Combined Retirement Housing Single Centroid Perspective**

	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K
Site A	100	82	86	87	68	78	79	83	84	89	83
Site B	82	100	78	82	72	80	82	87	79	89	79
Site C	86	78	100	80	61	77	77	74	78	80	80
Site D	87	82	80	100	73	76	86	89	85	91	84
Site E	68	72	61	73	100	74	73	72	68	72	69
Site F	78	80	77	76	74	100	78	77	74	79	80
Site G	79	82	77	86	73	78	100	85	76	85	77
Site H	83	87	74	89	72	77	85	100	84	92	75
Site I	84	79	78	85	68	74	76	84	100	85	81
Site J	89	89	80	91	72	79	85	92	85	100	85
Site K	83	79	80	84	69	80	77	75	81	85	100
Combined	92	92	90	92	81	85	92	94	91	95	88

There appears to be a considerable degree of alignment of views across all eleven of the Retirement Housing sites and even more so with the single centroid position from the Retirement Housing Combined Study.

Site E has the lowest correlation with the Retirement Housing Combined Study (0.81) and the single centroid arrays from all the other Retirement Housing sites, suggesting that the perspectives of the residents from this site are the most different and distinct from other Retirement Housing sites. Site E has the lowest correlations (under 0.70) with the four smallest sites with 30 or fewer properties and part-time Court managers (Sites C, A, I and K) while Site E

has a full-time manager who lives on-site even though it is a similarly small site with just 30 properties. The highest correlation of Site E is with Site F (0.74), which also has a full-time manager who lives on site, but is a larger development with 43 properties. Site E is one of the oldest Retirement Housing sites in terms of its date of construction (1973) and also one of the few Housing 21 sites that at the time of the research had not yet undergone a process of modernisation. Despite being in a port town location it had the lowest guest room income of just £60 in 2017/18. There may therefore be factors other than the presence of a resident manager that influenced the preferences and perspectives of the residents from Site E. Site E also had an older age profile of participants than other sites with over half of the nine participants aged 85 or over and none aged under 65. This is in contrast with Site C, with which Site E had the lowest correlation (0.61), that was also built in 1973 and had nine participants but only one participant was aged 85 or over and four were aged under 65. Apart from Sites E and F the only other site with a correlation to the Combined Retirement Housing perspective of under 0.90 is Site K (0.88) which does not have a full-time or a resident manager, but did have a relatively high age profile with five of the thirteen participants aged 85 or over.

Site J had the highest correlation with the Retirement Housing Combined Study (0.95) and the highest correlation with single centroid arrays from six of the ten other Retirement Housing sites. Although Site J had the largest number of Retirement Housing participants (24) this does not fully explain its consensus position, as Site F had the second highest number of participants also had the second lowest level of correlation with the Combined Retirement Housing position. Site J has a particularly high correlation with Sites H (0.92) and D (0.91) and it interesting to note that these are the three sites with the largest numbers of properties.

There appears to be a lower correlation between the Retirement Housing site perspectives than was the case for Extra Care. For Extra Care the lowest correlation was 0.82, but for Retirement Housing 60% of the site correlations are lower than this. There is though still a high degree of correlation between most of the sites. Although the size and service arrangements may have an influence on the degree of difference or similarity between sites, it also appears that the profile of residents and their circumstances may also have an effect on the degree of correlation.

## 7A.4 Issues of Contention and Consensus for Retirement Housing Sites

Although not an accepted technique of Q methodology, the comparison of the results from Q studies on an item by item basis can provide an indication of the issues about which there is a general consensus and where there are statements that are considered to be particularly contentious. Figure 7A.2 provides an analysis of the range and positioning of the Factors considered in Chapter 6 (and shown in Appendix 12) from the eleven Retirement Housing Sites A–K for each of the 50 statements to allow comparisons to be made between the positioning and range of factor scores factor within and across the Retirement Housing sites. The cells in Figure 7A.2 indicate the degree of difference of perspective (i.e. number of places apart from the highest to the lowest factor score for the statement or item in the factor arrays for each of the Factors) with the subscript indicating the lowest and highest scores. Appendix 18 also provides charts showing the distribution of the Factors for each site on a statement by statement basis. This gives an indication of which statements appear to be the most contentious and produce the greatest divergence of perspective at each site and which appear to be less controversial and produce a consensus perspective.

- **Consensus Statements**

There are seven statements where there is a difference in statement scores between the perspectives of less than 3 positions for at least eight out of the eleven sites, suggesting a relative consensus and uniformity of views about these issues<sup>33</sup>. These are:

### **#24 (You have your own home with your own front door)**

For eight out of the eleven sites this is not controversial and has a positive consensus view from all perspectives, even though at some of these sites it is less of a priority than at others. However, for three Retirement Housing sites (Sites G, H and I) there appears to be a greater divergence of opinion between those who consider having their own home to be of upmost importance and scored this as +5 or +6 and those for whom this is not prioritised and scored between +1 and -2. The perspective of those that do not score this highly (i.e. Site G Factor 2 – Court Manager and Safe Tenure; Site H Factor 3 – On-Site Manager, Protected and Community Spirit; Site I Factor 3 – Safety and Security without Support) appear more concerned with having access to support, being looked out for and looked after than having the autonomy of their own home and front door.

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<sup>33</sup> The standard adopted for an item or statement to be considered a 'consensus statement' in the Q studies for Extra Care and Retirement Housing (in Chapter 6) was for its position in the factor array of all Factors to be less than 2 positions apart. However, for the purpose of demonstrating uniformity of consensus in the case study sites a broader definition of consensus has been applied that permits the positioning to be two or less positions apart in a clear majority (8 out of 11 - over 70%) of sites for it to be deemed a consensus. This reflects the fact that the smaller number of participants in the site case studies provide scope for greater variance between the Factors than was the case in the Combined Study.

### **#26 (Being seen as a form of care home)**

This is regarded as a strongly negative proposition and scored at -3 or lower by all but two of the twenty nine Retirement Housing site perspectives. At Site J three of the four factors score this as -5 or -6, but Site J Factor 3 (Peace of Mind, Repairs and Personal Space) did not regard this as being quite so negative (-2) perhaps because they were primarily concerned with property issues and did not even regard this concern as being a real prospect. Site I Factor 2 (A Home without Community) was the only perspective to give this issue a positive score (+2) but this similarly seems to reflect a lack of concern about this label rather a desire for care home like services or support and this perspective is clear that having residents with dementia or in need of care is not considered to be positive (#36: -4).

### **#33 (Residents who take control and assume responsibility for organising things)**

For some perspectives at Extra Care sites this was seen as a positive feature, but for Retirement Housing it is seen as being negative, by every perspective apart from Site E Factor 1 (Warm and Respected with On-Site Manager) which scored this as +1. Site E Factor 2 only scored this as -1 so although the site was an outlier there was still a high degree of consistency between the perspectives at this location. The only site with a difference between perspectives of 3 or more positions is Site J with a difference of 3 (-4 for Factors 3 and 4 to -1 for Factor 2).

### **#34 (People don't respect privacy or confidentiality)**

#### **#35 (Gossip spreads quickly)**

These are consistently seen as highly negative features indicative of a strong shared dislike of any encroachment on personal boundaries or the process of passing comment on judgement on behaviour by others. Loss of privacy is though seen as being less precious by particular perspectives in some locations. Site I Factor 2 (A Home without Community) does not seem especially concerned about a loss of privacy (#34: -1) or gossip (#35: -2). At Site J Factor 4 (Dignity, Community Spirit and Standards) seems less concerned about loss of confidentiality (#34: -2) but most concerned about gossip (#35: -6) while the opposite is the case for Site J Factor 1 (Tenure, Respect and Age) (#34: -6) (#35: -3). These outliers seem to support the view that degrees of tolerance toward the behaviour of others may ultimately depend upon the personal attitudes and subjective dispositions of different Retirement Housing residents.

### **#38 (Small flats)**

This was seen as a universally negative feature, that scored as -3 or lower by all Retirement Housing site factors with the exception of Site A Factor 1 (-2: Secure But Not Social) and Site I Factor 1 (-2: Own Home with Dignity and Freedom) despite both being concerned to have the independence of their own home. It is interesting to note that despite having the highest proportion (over 83%) of small studio (i.e. bedsit) properties the participants from Site I had the least negative view of having small properties.

### **#47 (Suitable storage area for buggies and other large items)**

This does not appear to be a particular priority or source of contention at many sites, but for the perspectives at Site B there is a considerable difference between Factor 1 (+2: Safety, Speed and Certainty) and Factor 2 (-4: Age Exclusivity with No Worries) and also between Site H Factor 1 (+1) and Factor 2 (-3) and Site I Factor 2 (0) and Factor 1 (-4). These differences appear to relate to the personal preferences of different participants for mobility scooters and storage facilities rather than being attributable to the particular site characteristics.

Figure 7A.2: Analysis of Statements of Consensus and Contention for Retirement Housing Sites A-K<sup>34</sup>

No.	Statement	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	Difference across Sites A - K
1	A court manager to turn to if you need help and advice	3 +3 : +6	3 +3 : +6	3 +2 : +5	4 +2 : +6	2 +4 : +6	6 -1 : +5	1 +5 : +6	4 +2 : +6	3 +3 : +6	2 +4 : +6	3 +1 : +4	34
2	A resident manager or warden who lives on-site	4 -5 : -1	6 -4 : +2	2 -5 : -3	4 -4 : 0	4 +2 : +6	10 -4 : +6	2 -3 : -1	8 -2 : -6	1 -2 : -1	4 -4 : 0	1 -2 : -1	46
3	A court manager who is only employed on a part-time basis	6 -4 : +2	4 -6 : -2	1 -4 : -3	3 -3 : -6	4 -6 : -2	4 -5 : -1	1 -5 : -4	2 -6 : -4	2 -2 : 0	3 -6 : -3	2 -4 : -2	32
4	Close to shops, amenities and transport	4 -3 : +1	3 -1 : +2	7 -1 : +6	1 0 : +1	2 0 : +2	1 0 : +1	4 0 : +4	7 -3 : +4	4 +1 : +5	7 -3 : +4	4 +1 : +5	44
5	No need to worry about maintenance and repairs	1 +2 : +3	5 +1 : +6	5 -1 : +4	3 0 : +3	1 -1 : 0	4 +2 : +6	1 +1 : +2	1 +2 : +3	5 +1 : +6	4 +1 : +5	2 +3 : +5	32
6	Repairs or problems are addressed and fixed quickly	2 +2 : +4	3 +1 : +4	1 +1 : +2	5 -2 : +3	4 +1 : +5	4 0 : +4	3 0 : +3	1 +2 : +3	2 +1 : +3	3 +1 : +4	0 +1	28
7	The appearance of the Court creates a good impression	1 -1 : 0	1 -1 : 0	1 0 : +1	3 0 : +3	4 -1 : +3	2 -1 : +1	0 -1	2 0 : +2	6 -4 : +2	3 0 : +3	6 -2 : +4	29
8	Companionship of neighbours so you are never lonely	3 -1 : +2	2 +1 : +3	2 -1 : +1	3 0 : +3	1 0 : +1	3 -2 : +1	3 -2 : +1	6 -2 : +4	3 -1 : +2	3 0 : +3	1 -1 : 0	30
9	Use of a communal lounge and other shared facilities	1 -1 : 0	1 -1 : 0	1 +1 : +2	3 0 : +3	4 -4 : 0	2 -1 : +1	2 +1 : +3	4 -1 : +3	3 -2 : +1	8 -6 : +2	1 -2 : +1	30
10	Peace of mind that comes from being looked after	3 -1 : +2	3 +1 : +4	8 -5 : +3	6 -2 : +4	1 +3 : +4	6 -3 : +3	2 0 : +2	3 +2 : +5	3 -1 : +2	5 -1 : +4	5 -3 : +2	45
11	Living around people of a similar age and outlook	3 -2 : +1	4 -2 : +2	2 -2 : 0	4 -2 : +2	3 -1 : +2	1 -2 : -1	5 -2 : +3	2 -1 : +1	4 -4 : 0	8 -5 : +3	1 0 : +1	37
12	Occupancy restricted to only retired people aged over 65	0 -3	8 -4 : +4	1 -3 : -2	6 -2 : +4	8 -2 : +6	8 -2 : +6	9 -3 : +6	4 -2 : +2	4 -4 : 0	3 -3 : 0	1 -3 : -2	52
13	Residents are able to have dogs, cats or other pets	6 -3 : +3	11 -5 : +6	7 -1 : +6	1 -4 : -3	2 -5 : -3	2 -5 : -3	2 -2 : 0	1 -4 : -3	3 -6 : -3	7 -5 : +2	1 -3 : -2	43
14	Having security of tenure	2 +2 : +4	3 0 : +3	4 +2 : +6	3 -2 : +1	5 0 : +5	2 +2 : +4	4 +2 : +6	4 0 : 4	5 0 : +5	5 +1 : +6	5 +1 : +6	42
15	A communal laundry room with washers and dryers	0 +1	2 -1 : +1	1 +2 : +3	4 -2 : +2	5 -1 : +4	1 +2 : +3	4 0 : +4	3 -1 : +2	2 +2 : +4	2 -1 : +1	5 -4 : +1	29
16	An effective and efficient heating and hot water system	4 +1 : +5	3 +3 : +6	1 +3 : +4	1 +3 : +4	3 +2 : +5	2 +3 : +5	1 +2 : +3	4 +1 : +5	4 0 : +4	4 0 : +4	2 +1 : +3	29
17	Feeling safe and secure	2 +4 : +6	5 +1 : +6	1 +4 : +5	4 +2 : +6	3 0 : +3	1 +3 : +4	1 +4 : +5	1 +5 : +6	4 +2 : +6	4 +5 : +6	2 +2 : +4	25

<sup>34</sup> Cells indicate the degree of difference of perspective (i.e. number of places apart in factor scoring grid) with subscript of lowest and highest scores

18	A garden or balcony so you can sit out in private	2 -2:0	5 -3:+2	2 0:+2	5 -4:+1	2 -3:-1	4 -1:+3	1 -2:-1	2 -3:-1	4 -5:-1	3 -2:+1	6 -1:+5	36
19	Social events and activities to get involved in	2 -2:0	2 -2:+1	2 -4:-2	3 -2:+1	4 -3:+1	1 -3:-2	2 -1:+1	5 -4:+1	8 -6:+2	4 -1:+3	2 -3:-1	35
20	Availability of a good internet connection and/or wifi	0 -2	10 -5:+5	3 0:+3	1 -3:-2	4 -4:0	4 -2:+2	7 -5:+2	5 -6:-1	4 -5:-1	4 -3:+1	1 0:+1	43
21	Pull-cord or pendant to summon help in an emergency	4 +2:+6	5 +1:+6	2 0:+2	5 +1:+6	1 +1:+2	2 +1:+3	3 0:+3	4 +1:+5	2 +3:+5	7 -1:+6	6 -1:+5	41
22	Sufficient car parking spaces	2 0:+2	5 -3:+2	1 -1:0	6 -3:+3	3 -2:+1	8 -2:+6	2 -2:0	6 -3:+3	2 -2:0	1 -2:-1	5 -2:+3	41
23	Community spirit and friendship with people of similar age and outlook	7 -4:+3	3 -1:+2	1 -1:0	5 -2:+3	1 -2:-1	3 -1:+2	2 -1:+1	4 0:+4	6 -3:+3	5 -1:+4	3 -1:+2	40
24	You have your own home with your own front door	2 +2:+4	1 +2:+3	1 +5:+6	2 +4:+6	1 +3:+4	1 +5:+6	5 +1:+6	7 -2:+5	6 0:+6	2 +3:+5	2 +4:+6	30
25	In a nice area with attractive surroundings	1 0:+1	5 -2:+3	1 -2:-1	1 +1:+2	4 0:+4	3 0:+3	1 0:+1	3 0:+3	3 -2:+1	2 0:+2	1 -1:0	25
26	Being seen as a form of care home	1 -6:-5	2 -6:-4	1 -6:-5	2 -6:-4	0 -4	3 -6:-3	0 -4	3 -4:-3	6 -4:+2	4 -6:-2	1 -6:-5	21
27	Freedom to live as you choose: no requirement to join in or conform	1 +4:+5	6 -1:+5	2 +1:+3	4 +1:+5	4 0:+4	2 0:+2	0 +2	3 -2:+1	4 0:+4	4 0:+4	3 +3:+6	33
28	Independent living	1 +4:+5	3 -1:+2	4 +1:+5	2 +3:+5	5 +1:+6	5 0:+5	1 +4:+5	3 +1:+4	1 +3:+4	3 +2:+5	4 +2:+6	32
29	Able to have your say and raise matters with senior management	0 +1	3 -1:+2	1 +1:+2	5 -1:+4	4 -1:+3	4 -2:+2	0 +3	3 -2:+1	2 -3:-1	6 -3:+3	0 +3	28
30	Residents are engaged and able to exercise choice and control	4 -1:+3	2 -2:0	2 +1:+3	4 -1:+3	3 -1:+2	3 -2:+1	5 -2:+3	3 -1:+2	5 -5:0	3 -1:+2	2 -2:0	36
31	Residents are treated with dignity and respect	2 +3:+5	1 +4:+5	2 +1:+3	3 +2:+5	7 -2:+5	3 +1:+4	1 +4:+5	5 +1:+6	5 +1:+6	5 +1:+6	1 +3:+4	35
32	Some other residents behave badly	1 -6:-5	1 -6:-5	2 -6:-4	0 -5	4 -5:-1	1 -6:-5	0 -6	3 -6:-3	6 -6:0	3 -6:-3	1 -6:-5	22
33	Residents who take control and assume responsibility for organising things	0 -3	2 -3:-1	1 -4:-3	1 -3:-2	2 -1:+1	1 -3:-2	2 -4:-2	2 -3:-1	1 -4:-3	3 -4:-1	1 -3:-2	16
34	People don't respect privacy or confidentiality	2 -6:-4	1 -5:-4	1 -6:-5	1 -5:-4	0 -6	3 -6:-3	1 -5:-4	1 -5:-4	5 -6:-1	4 -6:-2	1 -5:-4	20

No.	Statement	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	Difference across Sites A - K
35	Gossip spreads quickly	2 -6 :-4	1 -6 :-5	3 -6 :-3	2 -6 :-4	2 -6 :-4	2 -6 :-4	0 -6	2 -6 :-4	3 -5 :-2	3 -6 :-3	1 -6 :-5	21
36	Residents with dementia or who need to be looked after	1 -1 : 0	3 -2 : +1	1 -2 : -1	5 -6 : -1	4 -1 : +3	8 -3 : +5	0 -1	4 -2 : +2	5 -4 : +1	7 -4 : +3	2 -6 : -4	40
37	Living in close proximity to others in a compact community	5 -4 : +1	2 -3 : -1	6 -4 : +2	3 -2 : +1	2 -3 : -1	1 -4 : -3	1 -3 : -2	3 -3 : 0	3 -3 : 0	7 -6 : +1	2 -6 : -4	35
38	Small flats	3 -5 : -2	1 -4 : -3	1 -4 : -3	3 -6 : -3	1 -5 : -4	2 -6 : -4	1 -5 : -4	1 -6 : -5	1 -3 : -2	1 -5 : -4	1 -4 : -3	16
39	Properties and facilities that are modern and well designed	0 -1	4 -1 : +3	1 0 : +1	2 -1 : +1	1 -3 : -2	6 -1 : +5	2 -1 : +1	1 -1 : 0	3 -2 : +1	4 -2 : +2	3 -1 : +2	27
40	Buildings and gardens are kept clean and tidy	2 -1 : +1	4 -2 : +2	2 +2 : +4	3 0 : +3	0 +1	2 -1 : +1	0 -1	3 -1 : +2	3 0 : +3	2 0 : +2	4 0 : +4	25
41	Contemporary kitchens and bathrooms	1 -3 : -2	2 -3 : -1	1 -2 : -1	2 -1 : +1	3 0 : +3	2 +1 : +3	2 0 : +2	4 -4 : 0	4 -3 : +1	2 -2 : 0	1 0 : +1	24
42	Checks on fire, electrical, gas, asbestos and water safety	0 +3	2 +1 : +3	3 +1 : +4	6 0 : +6	3 0 : +3	5 -1 : +4	4 0 : +4	4 +1 : +5	6 -2 : +4	7 -2 : +5	2 +1 : +3	42
43	Everyone is kept informed and up to date about local plans and activities	2 -2 : 0	6 -1 : +5	3 -2 : +1	1 -1 : 0	3 -2 : +1	4 -2 : +2	0 +1	2 -1 : +1	2 -1 : +1	6 -2 : +4	1 -1 : 0	30
44	Information about costs and charges is correct, clear and comprehensive	1 0 : +1	4 0 : +4	6 -2 : +4	2 -1 : +1	1 +1 : +2	5 -1 : +4	2 0 : +2	3 -3 : 0	3 -1 : +2	1 0 : +1	1 +1 : +2	29
45	Wide doors, that are easy to open, for people with reduced mobility	0 0	3 -2 : +1	0 0	6 -4 : +2	3 -2 : +1	3 -3 : 0	3 -2 : +1	4 -1 : +3	3 -1 : +2	4 -2 : +2	2 0 : +2	31
46	A reliable lift	4 -2 : +2	1 -3 : -2	3 -4 : -1	0 +1 : +4	4 -2 : +2	1 -2 : -1	2 -3 : -1	2 -1 : +1	5 0 : +5	3 -2 : +1	2 0 : +2	30
47	A suitable storage area for buggies and other large items	2 -3 : -1	6 -4 : +2	1 -1 : 0	2 -3 : -1	1 -3 : -2	2 -2 : 0	0 -3	4 -3 : +1	4 -4 : 0	1 -4 : -3	1 -2 : -1	24
48	Good staff who provide consistency of service	5 +1 : +6	5 0 : +5	1 -1 : 0	4 +1 : +5	2 -3 : -1	3 -1 : +2	1 +1 : +2	1 +3 : +4	3 +1 : +4	3 +1 : +4	2 0 : +2	30
49	Common lounge used by external organisations and groups	1 -2 : -1	2 -3 : -1	1 -3 : -2	5 -6 : -1	2 -5 : -3	4 -5 : -1	1 -3 : -2	6 -4 : +2	6 -6 : 0	1 -3 : -2	1 -4 : -3	30
50	Guest room available for visitors	4 -4 : 0	1 -1 : 0	5 -2 : +3	2 -2 : 0	0 +2	1 0 : +1	3 -3 : 0	3 -2 : +1	4 -2 : +2	2 -2 : 0	2 0 : +2	27
<b>Total Difference</b>		110	171	115	159	137	161	100	164	186	189	110	

- **Contentious Statements**

There are eight statements where there is a difference between the perspectives of three or more positions for at least eight out of the eleven sites, suggesting these are more likely to be issues of general contention about which there are divided opinions. These are:

**#1 (A court manager to turn to if you need help and advice)**

**#4 (Close to shops, amenities and transport)**

**#10 (Peace of mind that comes from being looked after)**

**#12 (Occupancy restricted to only retired people aged over 65)**

**#14 (Having security of tenure)**

**#20 (Availability of a good internet connection and/or wifi)**

**#23 (Community spirit and friendship with people of a similar age and outlook)**

**#30 (Residents are engaged and able to exercise choice and control)**

Whilst it might be supposed that differences of preference and perspective in respect of these issues might be primarily determined by differences in the personal disposition, circumstances and characteristics amongst the population of resident participants at each site, they might also be influenced to a greater or lesser degree by their reaction and attitude to the nature, location, design, effectiveness and specification of the service they are currently experiencing at their particular site. Hence a site with a manager who is particularly effective in responding to residents' individual needs is more likely to be universally appreciated than one where the manager has a more fixed view of their role. The proximity of a site to amenities might also influence the level of appreciation of these facilities.

The differences in the total difference in positions across all statements between sites is not seen as being of particular significance as it is likely to have been influenced, at least in part, by the number of factors identified, which in turn may have been affected by the number of participants from each site. The more perspectives there are the more scope there is for a divergence of views. Hence the sites with the lowest total difference in positions across all statements are Sites G (100), A (110), K (110), C (115) and E (137) which are the sites where only two perspectives were identified, whereas Site J which has four perspectives also has the highest total difference of perspective positions (189). Although the total difference in perspective positions for each statement across each of the Retirement Housing sites may provide another means of identifying which statements are most contentious, it is proposed that these issues might be better understood by considering the differences in the profile and attitudes and issues that appear to be particularly contentious or distinctive for each Retirement Housing site.



### **Contentious or Distinctive Perspectives for Site A**

There is a generally low level of difference between the positions and preferences of the two perspectives identified at Site A and only 5 statements where the scores for the two perspectives identified are five or more positions apart. The statements of greatest contention for Site A are:

#3 (A court manager who is only employed on a part-time basis)

Site A has a part-time Court Manager and Site A Factor 1 (Secure But Not Social) has the highest score for having a part-time court manager (+2) of any of factors from the Retirement Housing sites.

#48 (Good staff who provide consistency of service)

Site A Factor 2 (Supported But Not Small) rated this as +6, which was higher than any perspectives from any of the other Retirement Housing sites. This may be because with a part-time court manager the quality and continuity of the person providing the service takes on a heightened importance, even though this perspective would prefer to have had a full-time manager and scored #3 as -4.

#13 (Residents are able to have dogs, cats or other pets)

Site A Factor 2 scored the ability of residents to have dogs, cats or other pets as +3 and is one of only four sites to have perspectives that are positive about residents having pets.

#23 (Community spirit and friendship with people of a similar age and outlook)

#37 (Living in close proximity to others in a compact community)

Site A Factor 2 regarded community spirit (+3) and living in a compact community (+1) as positive features, but Site A Factor 1 ranked both of these statements as -4 and for #23 this was lower than any other perspective from any of the other Retirement Housing sites<sup>35</sup>.

Although there is not a pronounced difference between the perspectives at Site A, for statement #50 (Guestroom available for visitors) Site A Factor 2 has the lowest score (-4) of any perspective across all the other Retirement Housing sites. The strength of feeling about this might potentially be a consequence of the location of Site A, on the Norfolk Broads, resulting in the guest room being booked by residents from other Housing 21 sites as a base for a holiday rather than as an amenity for the residents themselves.

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<sup>35</sup> Site A was the only site where some participants asked to conduct the study in their own home because they did not want to mix with others in the communal lounge area.

### **Contentious or Distinctive Perspectives for Site B**

Site B has the third highest total level of difference from the positions and preferences of the three perspectives identified and there are 7 statements where the scores for the highest and lowest of the three perspectives are six or more positions apart.

The most contentious issue at Site B appears to be #13 (Residents are able to have dogs, cats or other pets) with Site B Factor 3 (Autonomy, Animals and Internet) identifying this as the most important feature or consideration (+6) while Site B Factor 2 (Age Exclusivity with No Worries) scored this a something that they definitely did not like or want (-5) indicating that on this issue there are some very polarised opinions. There is a similarly large divide between these perspectives at Site B with regard to #20 (Availability of good internet connection and/or wifi) with this being something Factor 2 definitely did not want or like (-5) but was highly valued by Factor 3 which rated it higher than any other perspective from any of the other Retirement Housing sites (+5). These seem to be matters of personal preference entirely linked to the characteristics of the particular participants.

Despite there only being three participants at Site B aged under 65, there was also a wide difference of preference for #12 and occupancy being restricted to only retired people aged over 65. Factor 2 (Age Exclusivity with No Worries) saw this as a positive (+4), but Factor 1 (Safety, Speed and Certainty) and Factor 3 (Autonomy, Animals and Internet) both rated this at -4, which is also the lowest level of any perspective from other Retirement Housing sites. This also appears to be a matter of personal preference, but may be influenced by the nature of the relationships and resident interactions that have developed at Site B.

There are higher preferences for certain statements from perspectives at Site B than from any other Retirement Housing sites: #43 (Everyone is kept informed and up to date about local plans and activities) (Factor 2, +5), #47 (A suitable storage area for buggies and other large items) (Factor 1, +2) and #5 (No need to worry about maintenance and repairs) (Factor 2, +6). It is likely that whilst these are still personal preferences they may also have been influenced by the impressions gained of the services and facilities that Site B provides.

Despite the divided opinions about pets, the internet, age criteria and other matters Site B appears to still be quite a harmonious community with a high degree of consensus across all perspectives and an entirely positive view with regard to #8 (Companionship of neighbours so you are never lonely).

### **Contentious or Distinctive Perspectives for Site C**

There were 7 statements of contention where the perspectives of residents at Site C differed by five or more places. These were:

- #10 (Peace of mind that comes from being looked after)
- #4 (Close to shops, amenities and transport)
- #13 (Residents are able to have dogs, cats or other pets)
- #37 (Living in close proximity to others in a compact community)
- #44 (Information about costs and charges is correct, clear and comprehensive)
- #50 (Guest room available for visitors)
- #5 (No need to worry about maintenance and repairs)

The divergence of preferences in respect of these statements between the two Site C perspectives identified appears to suggest that notwithstanding the generally high degree of commonality and consensus there may be two distinct sets of motivations and priorities amongst the residents. Whilst these may be primarily attributable to their personal circumstances and dispositions, the presence of resident participants with these particular preferences may have also been influenced by the location and nature of the services and accommodation that Site C provides.

Site C Factor 2 (Safe Secure and Convenient) rates access to shops amenities and transport as a top priority (#4, +6) and higher than the perspectives from any other Retirement Housing sites and being looked after as a negative (#10, -5) lower than any other perspectives from other Retirement Housing sites. For these residents the convenience of the location of the property is a paramount consideration and they do not need or want to be supported. This perspective might be a particular consequence of the high property prices and difficulty of securing accommodation near the centre of Cambridge. Site C Factor 2 also has the highest desire from any of the Retirement Housing sites to ensure that they have information about costs and charges costs (#44, +4) and the lowest concern about maintenance and repairs (#5, -1) which are also potential indicators of their personal circumstances and disposition. Site C Factor 2 also appears ready and more willing to accept living in close proximity to others (#37, +2), more so than Factor 1 (#37, -4) or any other Retirement Housing perspective. It does not seem that this is because they particularly want companionship or to be part of a community, but may possibly be as a consequence of seeing this is a necessary trade-off for value and convenience of location. The high accommodation and hotel costs in Cambridge may also be an influence of Site C Factor 1 rating #50 (Guest room available for visitors) higher than the perspectives from any other site (+3).

Although there is a considerable divide between the most pro-pet stance of Site C Factor 1 (Own Home Independence with Help on Hand) (#13, +6) and the less enthusiastic position of Site C Factor 2 (#13, -1), Site C still seems to be by far the most favourably inclined towards pets of any Retirement Housing location.

### **Contentious or Distinctive Perspectives for Site D**

There are 5 statements where there is a difference of six places between the three perspectives identified at Site D, but no statements with a higher difference. Overall Site D has the lowest total difference across all statements of any of the Retirement Housing sites with three perspectives.

The residents represented by Site D Factor 1 (Support and Suitability) are more concerned than the perspectives identified at other Retirement Housing sites to have their say and to be able to raise matters with senior management (#29, +4), but are completely opposed to having residents with dementia or who need to be looked after (#36, -6). These appear to be particular character traits and preferences not directly linked to the specific setting or services at Site D. This perspective also expressed a particular preference to maintain sufficient car parking spaces (#22, +3) notwithstanding that Site D, unlike other sites where a similar priority was expressed, had a large car park that seemed to be more than sufficient to accommodate all parking requirements and this was not seen as a priority for Factors 2 and 3 from Site D that both scored this as -3.

Factor 2 at Site D (Home and Community) has the lowest score, and only negative view expressed across all Retirement Housing sites, about having security of tenure (#14, -2) which may reflect a view that they felt they were able to make choices about where to live and would not feel compelled to remain at Site D if it was considered to be sub-standard or unsuitable. Factor 2 at Site D also has the lowest desire from any Retirement Housing perspective to have wide doors that are easy to manoeuvre (#45, -4) which is a clearly not a concern for these residents as Site D (despite being the third most recently built of the Retirement Housing sites) has quite narrow corridors with fire doors.

Factor 3 at Site D (Safety and Respect, but Independent) considers checks on safety to be of paramount importance (#42, +6) and of greater significance than any other Retirement Housing perspective and higher than Site D Factors 1 and 2 that both scored this as 0 indicating that there is nothing specific about Site D that is likely to have prompted this particular concern.

## **Contentious or Distinctive Perspectives for Site E**

Site E has the highest degree of total difference in the scores across all the statements for any of the sites with just 2 statements. There are 2 statements where two perspectives identified at Site E are six or more positions apart and a further 3 that are five positions apart. These are:

#12 (Occupancy restricted to only retired people aged over 65)

#31 (Resident are treated with dignity and respect)

#14 (Having security of tenure)

#15 (A communal laundry room with washers and dryers)

#28 (Independent living)

Site E Factor 1 (Warm and Respected with On-Site Manager) is one of just three perspectives from Retirement Housing sites that rates #2 (A resident manager or warden who lives on site) as a top priority (+6), but unlike other sites where this is counterbalanced by other perspectives that see this as a negative, at Site E the alternative perspective (Site E Factor 2) also rates this as a positive feature (+2). But neither of the Site E perspectives consider that #48 (Good staff who provide consistency of service) to be a priority, with this being rated as -1 by Factor 2 and lower than any other Retirement Housing perspective at -3 by Factor 1. It is likely that these views, although partly a reflection of personal preferences, may well have been influenced by and be a consequence of Site E being one of just two sites in the study that had a resident court manager.

Site E Factor 1 has the joint highest preference for a communal laundry (#15, +4), but this is not a feature that is valued by Site E Factor 2 (-1) so is likely to be a reflection of the circumstances and expectations of different residents rather than of the nature of the laundry at Site E.

Site E Factor 2 (Age, Security and Independence) appears to have particularly pronounced views in respect of some statements compared with the perspectives from other Retirement Housing sites. Site E Factor 2 is one of just two Retirement Housing perspectives to score Independent living (#28, +6) as a top priority. It also has the lowest scores of any Retirement Housing perspective for #17 (Feeling safe and secure) (0) and #31 (Residents are treated with dignity and respect) (-2). Site E Factor 2 is also particularly negative about #9 (Use of a communal lounge and other shared facilities) (-4). Although Site E Factor 2 also has the lowest score for #5 (No need to worry about maintenance and repairs) (-1), it also had the highest score for #6 (Repairs or problems are addressed and fixed quickly) (+5). These views appear to be linked to particular individual preferences and might be more extreme because they are formed from the views of just two residents and so not subject to the moderating effects of larger numbers of participants being constitutive of a perspective.

Although all participants at Site E were aged over 65 there does appear to be significant division of opinion about whether occupancy should be restricted to retired people aged over 65 (#12) between Factor 2 for whom this is a top priority (+6) and Factor 1 for whom this is seen as a negative (-2).

### **Contentious or Distinctive Perspectives for Site F**

There are 7 statements where the three perspectives identified at Site F are six or more positions apart.

#1 (A court manager to turn to if you need help and advice)

#2 (A resident manager or warden who lives on-site)

Site F Factor 3 (Safe, Protected and Private) sees having a resident manager or warden who lives on-site as a top priority (#2, +6) but the Factor 1 sees this as a neutral feature (0) and Factor 2 regards it as negative (-4). Factors 1 and 2 of Site F also give the lowest scores of any Retirement Housing site perspectives to having a court manager for help and advice (#1), with Site F Factor 2 (Modern, Maintained Property) being the only perspective to give this a negative score (-1). There thus appear to be obvious tensions at Site F regarding the nature and provision of the Court Manager service.

#22 (Sufficient car parking spaces)

The highest positioning of car parking (#22) as an issue across of any of the Retirement Housing site perspectives by Site F Factor 1 (Age, Independence and Parking), which is probably a consequence of lobbying by a number of residents from this site for increased car parking spaces to be created, while other Site F perspectives regard this as merely a moderately important (Factor 2, +2) or moderately unimportant (Factor 3, -2) issue.

#12 (Occupancy restricted to only retired people aged over 65)

The Site F Factor 1 perspective was also determined that Retirement Housing should only be for retired people and not younger working-age people (#12) so ranked this as a top priority (#12, +6) whereas Site F Factors 2 (-2) and 3 (-1) regard this as a slightly negative proposition.

#10 (Peace of mind that comes from being looked after)

#36 (Residents with dementia who need to be looked after)

Not only is Site F Factor 2 the most negative about the Court Manager service and negative about them living on-site, they also do not want to be looked after (#10, -3). Despite this they still appear to be the most positive of any Retirement Housing site perspective about having residents

with dementia or need to be looked after (#36, +5). It appears that this perspective may thus be providing a view about what Retirement Housing should be and what it should provide irrespective of the immediate and personal needs of the participants that formed this view.

#39 (Properties and facilities that are modern and well-designed)

Both Site F Factor 2 (#39, +5) and Factor 3 (#39, +3) have the most positive views from across the range of Retirement Housing perspectives about the importance of properties being modern and well designed, but Site F Factor 1, despite pressing for more car parking, did not think modern design was so important (#39, -1).

### **Contentious or Distinctive Perspectives for Site G**

Site G has the lowest overall divergence between the scores from all statements across its two perspectives, but there are nevertheless some specific issues that give rise to differences of preference and there are 5 statements where the two perspectives identified at Site G have scores five or more places apart. These are:

#11 (Living around people of a similar age and outlook)

#12 (Occupancy restricted to only retired people aged over 65)

#20 (Availability of a good internet connection and/or wifi)

#24 (You have your own home with you own front door)

#30 (Residents are engaged and able to exercise choice and control)

Site G Factor 1 (Own Home and Age Exclusive) considers that ensuring occupancy is only for retired people aged over 65 (#12) should be a top priority (+6) and is positive about living around people of a similar age and outlook (#11, +3). This contrasts with Site G Factor 2 (Court Manager and Safe Tenure) that sees a minimum age threshold and living around other older people as negative features (#12, -3) (#11, -2). Conversely Site G Factor 2 regards having access to the internet (#20) as a positive (+2) while Factor 1 sees it as something they particularly don't like or want (-5). Although both Site G Factors are unified in their support for residents being able to have their say and raise matters with senior management (#29, +3) only Factor 1 also wants to be able to exercise choice and control (#30, +3) while Factor 2 does not seem to have any desire to do so (-2).

The differences between the two Factors at Site G seem to be primarily linked to personal preferences and dispositions rather than site specific considerations, but they do provide an indication of how, within an apparently consensus setting, there may still be residents with different preferences and priorities.

## **Contentious or Distinctive Perspectives for Site H**

There are 6 statements where the three perspectives identified at Site H are six or more positions apart. A lot of these differences of perspective are not just related to personal preferences, but also seem to be linked to the perceptions and experiences of the particular facilities, services and context of Site H itself.

#49 (Common lounge use by external organisations and groups)

Although both Factor 2 (Own Home Dignity and Amenity) and Factor 3 (On-Site Manager, Protected and Community Spirit) of Site H consider #9 (Use of a communal lounge and other shared facilities) to be positive feature (+3), Site H Factor 3 is the only perspective across all the Retirement Housing sites that regards #49 (Common lounge used by external organisations and groups) as a positive feature (+2). This view may have been influenced by the fact that Age UK operates a Community Day Centre from the communal lounge three days a week and some of the participants in the research were also having lunches provided by Age UK.

#8 (Companionship of neighbours so you are never lonely)

#10 (Peace of mind that comes from being looked after)

All Site H Factors appear to have a particularly strong positive desire to be looked after (#10) with Factor 2 ranking this higher than any other Retirement Housing site perspective (+5). Although Site H Factor 2 also scored #8 (Companionship of neighbours so you are never lonely) higher than any of the other Retirement Housing site perspectives (+4) this view is not shared by Site H Factors 1 and 3 which both scored this as -2.

#2 (A resident manager or warden who lives on-site)

#24 (You have your own home with your own front door)

Site H ceased to have a resident Court Manager in May 2015, but residents associated with Site H Factor 3 still consider having a resident manager who lived on site would be a top preference (+6) even though Site H Factors 1 and 2 would both regard this as a negative feature (-2). Site H Factor 3 is more positive than perspectives from other Retirement Housing sites about having wide doors that are easy to open (#45, +3), but is the only perspective that considers #24 (You have your own home with your own front door) to be a negative feature (-2).

#4 (Close to shops, amenities and transport)

#22 (Sufficient car parking spaces)

Site H Factor 2 is positive (+4) about being close to shops, amenities and transport (#4), but Site H Factor 3 is one of the Retirement Housing perspectives that is most negative about this (-3). Proximity to shops and amenities is neither a particularly positive or negative requirement for



Site H Factor 1 (Supported Independence, Warm and Secure) perhaps because they have access to a car and hence this perspective scores #22 (Sufficient car parking spaces) highly (+3) even though there did not seem to be any problems in securing a parking spaces at the site.

### **Contentious or Distinctive Perspectives for Site I**

Site I has a greater overall degree of difference between the positioning of the statements from its three perspectives than any other site with three perspectives (and almost as much as Site J that had four identified perspectives). Although there are just 8 statements where the three perspectives identified at Site I are 6 or more positions apart, there are several statements where the perspectives from Site I do not necessarily align with the norms from other sites.

Site I Factor 3 (Safety and Security without Support) has the lowest preference (-4) of any of the perspectives from Retirement Housing sites for #7 (The appearance of the court creates a good impression) and the joint lowest (-2) for #25 (In a nice area with attractive surroundings). Although Site I Factor 3 is neutral (0) about #3 (A court manager who is only employed on a part-time basis), this is the second highest preference for this across all Retirement Housing sites and this Factor also has the second highest preference (+2) for #19 (Social events and activities to get involved in).

Site I Factor 2 (A Home without Community) is the only perspective to give a positive score to #26 (Being seen as form of care home) and is also less negative about #32 (Some other residents behave badly) (0) and #34 (People don't respect privacy and confidentiality) (-1) than the perspectives from any other Retirement Housing sites. This Factor is alone in giving #19 (Social events and activities to get involved in) the lowest possible score (-6) and also has the joint lowest perspective (-2) on #42 (Checks on fire, electrical, gas asbestos and water safety) and the lowest preference of all Retirement Housing site perspectives (-5) for #30 (Residents are engaged and able to exercise choice and control). Site I Factor 2 together with Site I Factor 1 (Own Home with Dignity and Freedom) both want to be close to shops, amenities and transport (#4, +5) and more so than most other sites. Although most Retirement Housing perspectives are negative in their views about residents being able to keep dogs, cats or other pets (#13), Site I Factor 1 is the only perspective that regards this as the very worst feature (-6).

Despite some 83% of the properties at Site I being small bed-sit/studio flats the consensus of all three Site I Factors was not as negative about small flats (#38) as the perspectives of other Retirement Housing sites properties. The size of the properties and the proximity of Site I to the facilities of a town centre has had the consequence of attracting a higher proportion of male

residents many of whom are under retirement age and this in turn may help to explain some of the atypical nature of attitudes expressed by the Site I perspectives.

### **Contentious or Distinctive Perspectives for Site J**

Site J was the only Retirement Housing site to produce four perspectives. Across the four perspectives there are 8 statements where there is a difference of seven or more places between them, which were:

- #4 (Close to shops, amenities and transport)
- #9 (Use of a communal lounge and other shared facilities)
- #11 (Living around people of a similar age and outlook)
- #13 (Residents are able to have dogs, cats or other pets)
- #21 (Pull-cord or pendant to summon help in an emergency)
- #36 (Residents with dementia or who need to be looked after)
- #37 (Living in close proximity to others in a compact community)
- #42 (Checks on fire, electrical, gas, asbestos and water safety)

The range and position of the perspectives reflects the different characteristics of the four Site J Factors: Factor 1 (Tenure, Respect and Age); Factor 2 (Supported, Social and Sage); Factor 3 (Peace of Mind, Repairs and Personal Space); and Factor 4 (Dignity, Community Spirit and Standards). These are different perspectives that appear to reflect different personal priorities and preferences of participants rather than specific characteristics and features of Site J and as a relatively large site it is perhaps not surprising to find a mix of different resident likes and dislikes.

Site J does though have a lot of small studio or 1 bedroom/1 person properties and is not in a particularly affluent area so it is perhaps not surprising that it appeared to have a high proportion of people under 65 in the sample of participants and this may have played a part in three of the four Site J perspectives (Factors 2, 3 and 4) being less concerned than most other Retirement Housing perspectives about the loss of confidentiality (#34).

There was also a close positive alignment within Site J across all four perspectives in respect of #1 (A court manager to turn to if you need help and advice), #17 (Feeling safe and secure) and #24 (You have your own home with your own front door). All Site J perspectives have a reasonably neutral stance with regard to being in a nice area with attractive surroundings (#25), having buildings and gardens that are kept clean and tidy (#40) and needing kitchens and bathrooms to be contemporary (#41). There is a general negative consensus with regard to the need for storage areas for buggies and other large items (#47). These consensus views are not only

indicative of the correlation between the perspectives of residents but possibly also a consequence of the nature of Site J and the property and service proposition it presents.

### **Contentious or Distinctive Perspectives for Site K**

There are 7 statements where the two perspectives identified at Site K are three or more positions apart.

#7 (The appearance of the Court creates a good impression)

#18 (A garden or balcony so you can sit out in private)

Site K has won awards in gardening competitions and Factor 2 from Site K (Independent, Home and Garden) considers having a garden to be very important (#18, +5) as is ensuring the buildings and gardens are kept clean and tidy (#40, +4) and that the appearance of the Court creates a good impression (#7, +4) with all these issues being rated higher than for any other Retirement Housing site perspective including Factor 1 at Site K (Freedom, Tenure Security and Convenience) which does not appear concerned about the garden or appearances (#18, -1; #40, 0; #7, -2).

#10 (Peace of mind that comes from being looked after)

#14 (Having security of tenure)

#15 (A communal laundry room with washers and dryers)

#21 (Pull-cord or pendant to summon help in an emergency)

#22 (Sufficient car parking spaces)

There appears to also be a particular divide in opinions at Site K between those who want independent living (#28) which is rated as the most important issue for Factor 2 (+6) but seen as a relatively low priority (+2) for Factor 1. Site K Factor 2 does not want to be looked after (#10, -3) and has the joint lowest preference of all Retirement Housing perspectives for a pull-cord or pendant to summon help (#21, -1). Site K Factor 2 also has a strong preference for car parking (#22, +3), but the most negative view of any Retirement Housing perspective for the provision of a communal laundry (#15, -4) preferring to have their own washing facilities. Factor 2 of Site K also has the lowest possible score and the least tolerance for residents with dementia or who need to be looked after (#36, -6). As well as considering being looked after (#10, +2) and a pull-cord (#21, +5) to be more important, Site K Factor 1 also considers having security of tenure and the confidence that they can remain in their property to be a top priority (#14, +6).

## **Summary of Retirement Housing Site Perspectives**

It appears that the distinctiveness and contention of the perspectives of participants both within and between Retirement Housing sites are a consequence of a combination and the interaction of both site circumstances and personal preferences.

## **7A.5 Summary of Site Assessments and Comparisons**

The comparison of factors and perspectives across as well as within each site indicates that each Extra Care and Retirement Housing site is distinct and unique. Despite the high degree of overall correlation between the perspectives identified, there are relatively few issues on which there is a complete consensus view across all sites. Where there is a consensus this appears to be mainly about things that participants do not like or want, such as: #26 (Being seen as a form of care home), #34 (People don't respect privacy or confidentiality), #35 (Gossip spreads quickly), and #38 (Small flats). Although there are some issues that are generally more contentious these do not appear to be universally controversial, and at some sites there appears to be a relative uniformity of views about issues for which at other locations there are significant divergences of opinion.

Although the distinctiveness of the perspectives arises from the particular preferences, opinions and priorities of the participants at each site, it appears that some of these may be influenced by or be constitutive of the character of each site's specific location, facilities and services. It is also likely that differences of preference and expectations from residents at a site will have an impact on the nature of the relationships and interactions between residents and hence also have a consequence for the operation and perceptions of the site. It thus appears that the expectations of residents and the nature of the Extra Care or Retirement Housing provision they have experience of may be more interdependent than independent.

There appears to be a more consistent view about what the proposition should be for Extra Care than is the case for Retirement Housing, as indicated by the higher correlation between their single centroid perspectives. However, within both Extra Care and Retirement Housing sites, there are still issues of contention and differences of perspective and preference about the detail of what the services should provide or emphasise.

## ***Chapter 7 Contribution***

*This chapter has shown that, notwithstanding the high degree of correlation between site perspectives, there are differences in the patterns of preference and perspective between as well as within each of the Extra Care and Retirement Housing sites. Each site has its own distinctive profile which appears to relate in part to the location, facilities and services, but may also be influenced by the preferences and expectations of other residents thus creating an interdependency between the nature of the meso provision in each site and the micro preferences of the residents who live there.*

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## **Chapter 8**

### **Macro Findings and Population Priorities**

*This chapter considers the results from a 'second order' analysis of the perspectives from the initial studies in order to identify wider macro whole population perspectives. It also assesses the extent to which these macro distinctions may be attributable to demographic characteristics of the participants.*

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## 8A: Second Order Perspectives

### 8A.1 Second Order Analysis

Watts and Stenner (2012, p54/p67) suggest that the best and 'most sophisticated' means of comparing the results from multiple Q studies is to use the factor arrays they produce as new data and inputs for a new 'second order' Q study. The potential and purpose of second order Q methodology analysis was discussed in Chapter 4 (4C.4). But despite being an established technique of factor analysis (Kline, 1994), it does not seem to have been widely used in the field of Q methodology. Second order assessments have advantages over simple qualitative comparisons and scope to go beyond the mere testing of the degrees of correlation between the different perspectives. Second order analysis was thus used as a means to look for underlying distinctions and similarities and discover any 'super factors' within the factor arrays and perspectives from the Extra Care and Retirement Housing combined and site studies.

### 8A.2 Second Order Extra Care Analysis

The factor arrays identified from the Combined Extra Care Study and studies from Sites 1-5 were used as the inputs (Q sorts) for a second order analysis to consider the basis for the commonalities and differences within the initial sets of results. The results from the Combined Q Study of 68 Extra Care participants suggested there were three potential sets of perspectives. Similarly Sites 1, 3 and 5 (with 15, 14 and 21 participants) also identified three sets of perspectives, whereas only two perspectives were evident at Site 4 (with 9 participants) and just one at Site 2 (with 9 participants). However, rather than reinforcing the three perspective solutions from the combined and majority of the initial site studies the strongest solution from the second order analysis identified only two perspectives. Although this solution provides an explanation of 75% of the variance between the arrays, there was nevertheless also a high (0.75) degree of correlation between the two perspectives. This reinforces the view that the positions and perspectives being revealed by this analysis are more a demonstration of degrees of difference in preference and primary motivations rather than discreet and distinct attitudes and assessments.

The two perspectives identified are characterised as: **Independent, Secure and Connected** (Perspective 1); and **Cared For, Helped and Included** (Perspective 2). Appendix 19 shows the results from PQ Method for this second order solution and the how the factor arrays from the Combined Extra Care Study and studies from Sites 1-5 load onto these two perspectives.

Seven of the fifteen perspectives from the initial Extra Care studies loaded on Perspective 1 and four out of fifteen loaded on Perspective 2 at a 0.5 significance threshold level, with four arrays confounded with above a 0.5 level of significance for both perspectives.

Perspectives that aligned with Perspective 1 (i.e. Independent, Secure and Connected) were:

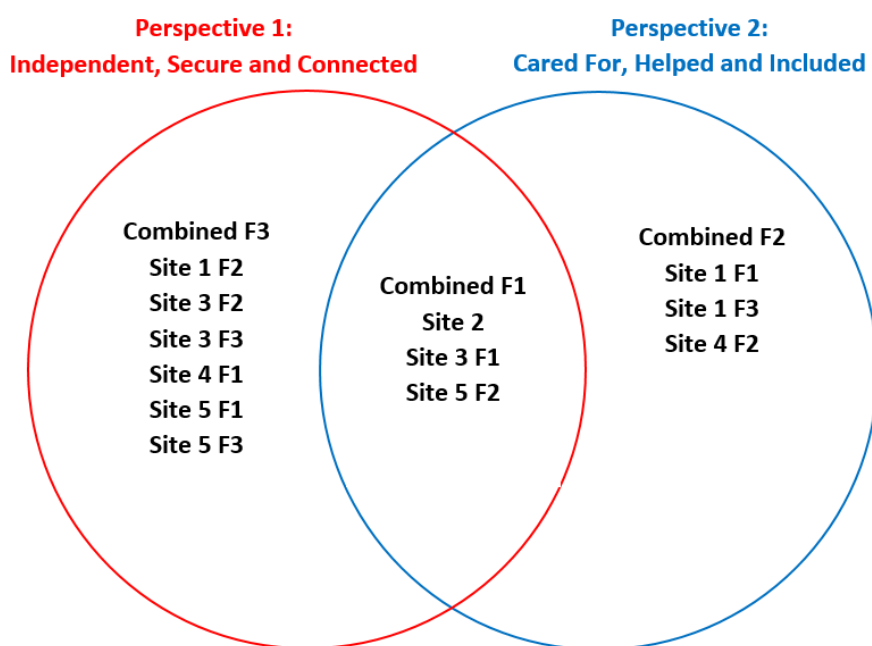
- Extra Care Combined Perspective 3: Security, Mobility and Amenity in Your Own Home
- Extra Care Site 1 Perspective 2: Security of Tenure and Independence
- Extra Care Site 3 Perspective 2: Community Spirit with Freedom and Independence
- Extra Care Site 3 Perspective 3: Security of Tenure in Own Home with Lift and Laundry
- Extra Care Site 4 Perspective 1: Living Independently in Your Own Home
- Extra Care Site 5 Perspective 1: Freedom and Security of Home with Mobility
- Extra Care Site 5 Perspective 3: Safe, Independent, Informed and Social

Perspectives that aligned with Perspective 2 (i.e. Cared For, Helped and Included) were:

- Extra Care Combined Perspective 2: Care, Companionship and Peace of Mind
- Extra Care Site 1 Perspective 1: Looked After and Access to Amenities
- Extra Care Site 1 Perspective 3: Safety with Community Spirit
- Extra Care Site 4 Perspective 2: Safe in Age Specific Setting with Care On-Call

The perspectives for Extra Care Combined Perspective 1 (Engaged, Independent and In Control), Extra Care Site 2 Single Perspective (Home and Help), Extra Care Site 3 Perspective 1 (Care and Help On-Call with Dignity and Respect) and Extra Care Site 5 Perspective 2 (Care, Support and Dignity) are all confounded and with loadings above 0.5 for both of the Second Order Perspectives.

**Figure 8A.1: Distribution of First Order Extra Care Factors across Two Second Order Perspectives**



### **Perspective 1: Independent, Secure and Connected**

Having the certainty of security of tenure (#14: +6) and ability to maintain independence (#28: +5) that comes from having your own home and front door (#24: +6) are the most important considerations.

Although this perspective shares the desire to feel safe and secure (#17: +5), be treated with dignity and respect (#31: +4) and have access to a care manager for help and advice (#1: +4) with the alternative (Cared For, Helped and Included) perspective, it is possible that the two perspectives may differ in their motivations and interpretations of these requirements.

The desire to have care staff on-call if required (#51: +3) is of a lower order than for the alternative perspective, indicating that the availability of care might be more of an occasional requirement or even seen as a contingency consideration. Similarly the ability to summon help via a pull-cord or pendant is possibly seen as more of a nice to have feature rather than a necessity (#21: +2).

This perspective enjoys the freedom to live as they choose and not be required to join in or conform (#27: +3) and does not see the advantages of having the companionship of neighbours (#8: -1) or getting involved in social events and activities (#19: 0). They do not want their neighbours to behave badly (#32: -6) or have to put up with gossip (#35: -6) or loss of privacy (#34: -5) so, without seeing any compensatory benefits from the social aspects of living in a community, they consider living in close proximity to others in a compact setting to be undesirable (#37: -3).

The restriction on occupation to only people over the retirement age of 65 is also seen as a negative requirement (#12: -4) as generally is the proposition of living around people of a similar age and outlook (#11: -1). Having residents with dementia or needing to be looked after is not seen as being a positive consideration (#36: -3).

Features such as an effective heating system (#16: +4), having a reliable lift (#46: +3) and wide doors for mobility (#45: +2) are welcomed. This perspective does not, however, appear to be particularly bothered about the aesthetics or modernity of design (#39: 0 and #41: -1), making sure things are kept clean and tidy (#40: 0) or having attractive surroundings (#25: 0).

Although this perspective does not demand to be close to shops, amenities and transport links (#4: -1) it does appear to be more concerned about being connected via the internet (#20: +1) and is at least neutral on the issue of car parking (#22: 0). There does not appear to be a particular desire to support for many of the standard shared features and facilities of Extra Care such as a communal lounge (#9: -2), an on-site hairdresser (#53: -2), an accessible bath (#54: -2), a guest room for visitors (#50: -2), a buggy store (#47: -1) and they are neutral about the communal laundry (#15: 0) and on-site restaurant (#52: 0). This perspective does not seek to exercise choice and control (#30: 0), but does expect to have complete and comprehensive information about costs and charges (#44: +1) and to be able to raise matters with senior managers if not satisfied (#29: +2).

## Perspective 2: Cared For, Helped and Included

Having care staff on site 24 hours 7 days a week (#51: +6) and being able to call them whenever needed via a pull-cord or pendant (#21: +5) are crucial for this perspective's overriding desire to feel safe and secure (#17: +6). This perspective also particularly appreciates having a care manager to turn to for help and advice (#1: +4) and being treated with dignity and respect (#31: +5). There is a desire to be looked after (#10: +3). Simply not having to worry about repairs and maintenance (#5: +4) is of far greater importance than having repair and maintenance jobs addressed promptly (#6: +1).

The care, service and support aspects of the service offer appear to be of greater significance and importance than having security of housing tenure (#14: 0). Having your own home and front door (#24: +3), the freedom to live as you choose (#27: +1) and ability to exercise choice and control (#30: +2) are valued, but so are the opportunities for social events and activities (#19: +3), the use of a communal lounge (#9: +2) and the provision of an on-site restaurant (#52: +3). Independent living does not seem to be seen as an end in itself (#29: 0). Despite the desire for care, support and companionship there is still a strong aversion to being associated with a care home (#26: -3).

There are obviously still negative aspects of living in a compact community (#37: -1) such as bad behaviour of others (#32: -6), gossip (#35: -5) and loss of privacy (#34: -1), but overall this perspective believes these are outweighed by the companionship that neighbours provide (#8: +2). This perspective is more positive about the merits of living around people of a similar age and outlook (#11: +1) but is not entirely convinced by the case for restricting occupancy to those aged over the retirement age of 65 (#12: -1).

Despite the preference of this perspective for community facilities they have a particularly strong aversion to small flats (#38: -6). They are not, however, especially impressed by some of the features and facilities of Extra Care including guest rooms for visitors (#50: -3), an accessible bath (#54: -1), an on-site hairdresser (#53: 0), a buggy store (#47: -2) or even a communal laundry room (#15: -1).

A particular aversion of this perspective is the ability of residents to be able to have dogs, cats or other pets (#13: -4) which, although not a universally popular policy, attracts less criticism in the alternative (Independent, Secure and Connected) perspective.

## Distinctive and Consensus Statements and Intensity of Preference

Table 8A.1 shows the 27 out of the 54 statements that are ranked differently by at two or more positions in the arrays so are indicative of contention and differences of views between the two Extra Care Second Order Perspectives (of these there are 16 statements that are positioned three or more places apart marked with an asterisk \*).

**Table 8A.1: Distinctive Statements for Extra Care Second Order Analysis**

	<b>P1 Independent Secure and Connected</b>	<b>P2 Cared for Helped and Included</b>
#14 Having security of tenure *	+6	0
#24 You have your own home with your own front door *	+6	+3
#28 Independent living *	+5	0
#16 An effective and efficient heating and hot water system	+4	+2
#27 Freedom to live as you choose: no requirement to join in or conform	+3	+1
#46 A reliable lift	+3	+1
#51 Care staff on-site 24 hours 7 days a week if needed (EC) *	+3	+6
#29 Able to have your say and raise matters with senior management	+2	0
#21 Pull-cord or pendant to summon help in an emergency *	+2	+5
#20 Availability of a good internet connection and/or wifi *	+1	-4
#44 Information about costs and charges is correct, clear and comprehensive *	+1	-2
#10 Peace of mind the comes from being looked after	+1	+3
#5 No need to worry about maintenance and repairs *	+1	+4
#22 Sufficient car parking spaces *	0	-3
#30 Residents are engaged and able to exercise choice and control	0	+2
#19 Social events and activities to get involved in *	0	+3
#52 An on-site restaurant (EC) *	0	+3
#13 Residents are able to have dogs, cats or other pets *	-1	-4
#11 Living around people of a similar age and outlook	-1	+1
#8 Companionship of neighbours so you are never lonely *	-1	+2
#53 Hairdressing salon on-site (EC)	-2	0
#9 Use of a communal lounge and other shared facilities *	-2	+2
#37 Living in close proximity to others in a compact community	-3	-1
#36 Residents with dementia or who need to be looked after *	-3	0
#38 Small flats	-4	-6
#12 Occupancy restricted to only retired people aged over 65 *	-4	-1
#3 A court manager who is only employed on a part-time basis	-5	-3

Table 8A.2 shows the other 27 statements where the ranking for the two Extra Care Second Order Perspectives is less than two positions apart and thus indicative of a consensus view.

**Table 8A.2: Consensus Statements for Extra Care Second Order Analysis**




	<b>P1 Independent Secure and Connected</b>	<b>P2 Cared for Helped and Included</b>
#17 Feeling safe and secure	+5	+6
#31 Residents are treated with dignity and respect	+4	+5
#1 A court manager to turn to if you need help and advice	+4	+4
#48 Good staff who provide consistency of service	+3	+4
#42 Checks on fire, electrical, gas, asbestos and water safety	+2	+2
#6 Repairs or problems are addressed and fixed quickly	+2	+1
#45 Wide doors, that are easy to open, for people with reduced mobility	+2	+1
#23 Community spirit and friendship with people of similar age and outlook	+1	+1
#7 The appearance of the Court creates a good impression	+1	0
#43 Everyone is kept informed and up to date about local plans and activities	+1	0
#25 In a nice area with attractive surroundings	0	+1
#40 Buildings and gardens are kept clean and tidy	0	0
#15 A communal laundry room with washers and dryers	0	-1
#39 Properties and facilities that are modern and well designed	0	-1
#4 Close to shops, amenities and transport	-1	-1
#18 A garden or balcony so you can sit out in private	-1	-1
#41 Contemporary kitchens and bathrooms	-1	-2
#47 A suitable storage area for buggies and other large items	-1	-2
#50 Guest room available for visitors	-2	-3
#54 An accessible bath for those that want or need it (EC)	-2	-1
#33 Residents who take control and assume responsibility for organising things	-2	-2
#2 A resident manager or warden who lives on site	-3	-2
#49 Common lounge used by external organisations and groups	-3	-4
#26 Being seen as a form of care home	-4	-3
#34 People don't respect privacy or confidentiality	-5	-5
#35 Gossip spreads quickly	-6	-5
#32 Some other residents behave badly	-6	-6



Figure 8A.2 shows the statements positioned on a grid according to the intensity of the preference expressed and the degree of difference between the two second order perspectives.

Figure 8A.2: Grid of Degree of Difference and Grading of Statements for Extra Care Second Order Perspectives

**Degree of Difference Between Perspective 1 and Perspective 2**

		Cared For, Helped and Included						Independent, Secure and Connected						
		6	5	4	3	2	1	0	1	2	3	4	5	6
Intensity of View	+6				#51		#17				#24			#14
	+5				#21		#31						#28	
	+4				#5		#48	#1		#16				
	+3				#52, #19	#10				#27, #46				
	+2			#9	#8	#30		#42	#6, #45	#29				
	+1					#11	#25	#23	#7, #43					
	0							#40						
	-1						#39	#4, #18	#15					
	-2				#44		#41, #47	#33	#54	#53				
	-3				#22		#50		#2	#37	#36			
	-4		#20		#13		#49		#26		#12			
-5							#34		#3					
-6					#38		#32	#35						

This grid shows the 28 statements in the central column of the grid that are not strongly distinctive of either perspective. There are seven positive things that Extra Care residents generally want (shaded green ), ten things that Extra Care residents are neutral or indifferent about (shown shaded yellow ) and eleven negative things that Extra Care residents generally did not like or want (shown shaded pink ). These shared views provide a potential indication to providers of Extra Care of the things that they might want to ensure they continue to do (or address if they are not doing so already), things they should stop doing or providing and seek to eliminate, and things that they should question the merits and justification for.

The statements more positively associated with Extra Care Second Order Perspective 1 (Independent, Secure and Connected) are shown on the grid shaded red . Seven of these are positive things that are more strongly supported by Perspective 1 (i.e. #14, #24, #28, #16, #27, #46 and #29) and five are things that are negative for Perspective 1 but more so for Perspective 2 (i.e. #38, #20, #13, #22 and #44). The statements more positively associated with Extra Care Second Order Perspective 2 (Cared For, Helped and Included) are shown on the grid shaded blue . Nine of these are positive things that are more strongly supported by Perspective 2 (i.e. #51, #21, #5, #52, #19, #10, #9, #8 and #30) and five are things that are negative for Perspective 2 but more so for Perspective 1 (i.e. #3, #12, #37, #36 and #53).

This distinction between the two second order perspectives might help to give focus and substance to questions about who and what Extra Care provision is intended to be for and whether it should seek to prioritise one or other these perspectives or if it is possible or desirable to try to effectively address both perspectives as is evidently the case at present.

### **8A.3 Second Order Retirement Housing Analysis**

The factor arrays identified from the Combined Retirement Housing Study and the studies for Sites A-K were used as the inputs (Q sorts) for a second order analysis to consider the basis for the commonalities and differences within the initial sets of results. The results of the Q study from the Combined Retirement Housing Study of 157 participants suggested there were four potential sets of perspectives. The results from Site J (with 24 participants) also identified four perspectives, Sites B, D, F, H and I (each with at least 14 participants except Site I with just 10) produced three perspectives whilst Sites A, C, E, G and K (all with less than 14 participants) had just two perspectives. However, rather than reinforcing the four or three perspective solutions from the Combined and majority of the initial Site studies the strongest solution from the second order analysis identified only two perspectives. This provides an explanation of 65% of the variance between the arrays and, despite not being quite as high as for the equivalent Extra Care study, still provides a very strong representation of the range views. There is though a high (0.77)



correlation between the two perspectives which suggests that these perspectives are indicators of alternative priorities and preferences rather than manifestations of entirely separate positions.

The two perspectives identified are characterised as: **Secure, Connected and Orderly** (Perspective 1); and **Looked After, Companionship and Consistency** (Perspective 2). Appendix 19 shows the results from PQ Method for this second order solution and how the factor arrays from the Combined Retirement Housing Study and the studies from Sites A-K load onto them.

Twelve out of the thirty three perspectives from the Retirement Housing studies loaded on Perspective 1 and fifteen loaded on Perspective 2 at a 0.5 significance level. Five arrays were confounded with above a 0.5 level of significance for both perspectives and one array was non-significant, failing to reach the 0.5 significance threshold for either perspective.

Perspectives aligned with Perspective 1 (i.e. Secure, Connected and Orderly) were:

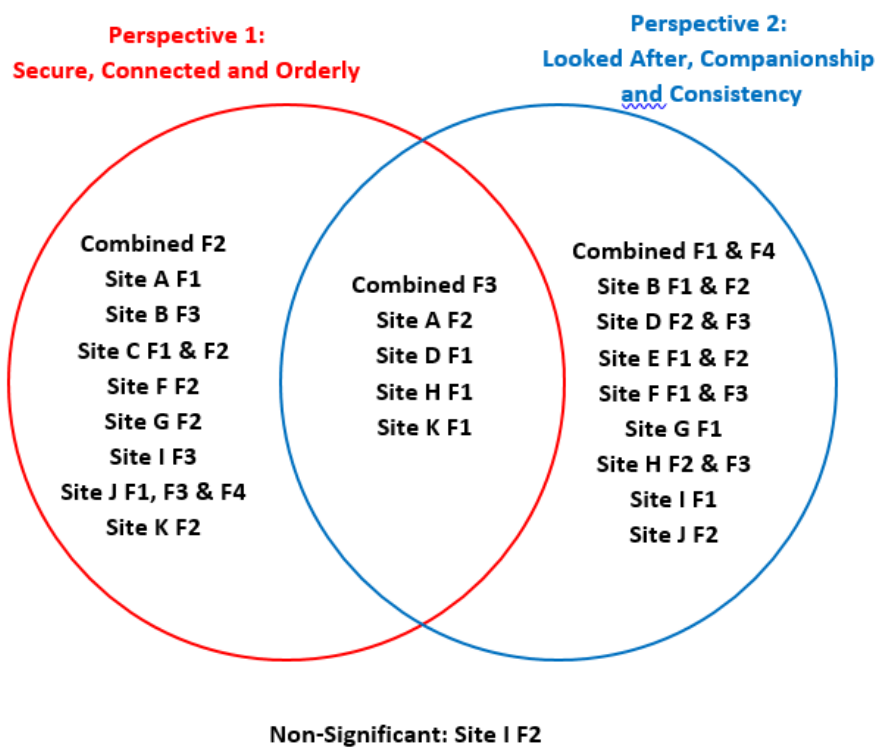
Retirement Housing Combined Perspective 2: Property Maintenance and Independence  
Retirement Housing Site A Perspective 1: Secure But Not Social  
Retirement Housing Site B Perspective 3: Autonomy, Animals and Internet  
Retirement Housing Site C Perspective 1: Own Home, Independence with Help on Hand  
Retirement Housing Site C Perspective 2: Safe, Secure and Convenient  
Retirement Housing Site F Perspective 2: Modern, Maintained Property  
Retirement Housing Site G Perspective 2: Court Manager and Safe Tenure  
Retirement Housing Site I Perspective 3: Safety and Security without Support  
Retirement Housing Site J Perspective 1: Tenure, Respect and Age  
Retirement Housing Site J Perspective 3: Peace of Mind, Repairs and Personal Space  
Retirement Housing Site J Perspective 4: Dignity, Community Spirit and Standards  
Retirement Housing Site K Perspective 2: Independent, Home and Gardens

Perspectives aligned with Perspective 2 (i.e. Looked After, Companionship and Consistency) were:

Retirement Housing Combined Perspective 1: Looked After and Dignified  
Retirement Housing Combined Perspective 4: Age and Assurance  
Retirement Housing Site B Perspective 1: Safety, Speed and Certainty  
Retirement Housing Site B Perspective 2: Age exclusivity with No Worries  
Retirement Housing Site D Perspective 2: Home and Community  
Retirement Housing Site D Perspective 3: Safety and Respect but Independent  
Retirement Housing Site E Perspective 1: Warm and Respected, with On-Site Manager  
Retirement Housing Site E Perspective 2: Age, Security and Independence  
Retirement Housing Site F Perspective 1: Age, Independence and Parking  
Retirement Housing Site F Perspective 3: Safe, Protected and Private  
Retirement Housing Site G Perspective 1: Own Home and Age Exclusive  
Retirement Housing Site H Perspective 2: Own Home, Dignity and Amenity  
Retirement Housing Site H Perspective 3: On-Site Manager, Protected and Community Spirit  
Retirement Housing Site I Perspective 1: Own Home with Dignity and Freedom  
Retirement Housing Site J Perspective 2: Supported, Social and Safe

The initial perspectives for Retirement Housing Combined Perspective 3 (Respect and Friendship), Retirement Housing Site A Perspective 2 (Supported But Not Small), Retirement Housing Site D Perspective 1 (Support and Suitability), Retirement Housing Site H Perspective 1 (Supported Independence, Warm and Secure) and Retirement Housing Site K Perspective 1 (Freedom, Tenure Security and Convenience) were all confounded and with loadings above 0.5 for Second Order Perspectives 1 and 2. Retirement Housing Site I Perspective 2 (A Home without Community) is non-significant for both Second Order Perspectives.

**Figure 8A.3: Distribution of First Order Retirement Housing Factors across Two Second Order Perspectives**



**Retirement Housing Perspective 1: Secure, Connected and Orderly**

The most important concerns for this perspective are to feel safe and secure (#17: +6) and have your own home and front door (#24: +6), but these are also important priorities for the alternative (Looked After, Companionship and Consistency) perspective. The distinctiveness of this perspective is that these preferences are combined with a desire for independent living (#28: +4) and having security of tenure (#14: +5).

This perspective values the availability of having a court manager for help and advice (#1: +4) but would not want them to live on-site (#2: -4) nor do they want to be looked after (#10: -1).

This perspective wants the freedom to live as they choose and not be required to join in or conform (#27: +3). They do not see social events as being important (#19: -2) so do not particularly value the provision of a communal lounge or other shared facilities (#9: -1). This perspective also values the potential to have private outside space in the form of a garden or even a balcony (#18: +1).

The lack of appreciation for some of the typical features and facilities of Retirement Housing, however, does not seem to be confined to this perspective. Neither perspective seem to value the provision of a guest room (#50: -1) or a storage area for buggies or bulky items (#47: -2/-3). Both perspectives do though want an effective and efficient heating system (#16: +4) and also see benefits from the provision of a communal laundry (#15: +2/+1).

The companionship of neighbours is not a priority (#8: 0) nor is creating a community spirit and friendships with people of a similar age and outlook (#23: 0). In fact living around people of a similar age and outlook is ranked as a negative consideration (#11: -1) and the requirement that Retirement Housing should be restricted to retired people aged over 65 is not liked or wanted (#12: -3).

This perspective wants information about costs and charges (#44: +2) but doesn't want to be informed about activities (#43: -1) indicating where their interests lie but also possibly a preference for information more than the process of being informed. This perspective is also concerned about ensuring they can be connected to the internet (#20: +2).

This perspective is concerned to ensure that everything is in order and that there are checks on fire, electrical, gas, asbestos and water safety (#42: +3) and also has a preference for buildings and gardens to be kept clean and tidy (#40: +2) and be modern and well-designed (#39: +1). Residents with this perspective are slightly more concerned than those in the 'Looked After, Companionship and Consistency' perspective to be able to exercise choice and control but this is not a priority (#30: 0), but if things do go wrong they want to at least be able to raise the matter with senior managers (#29: +1).

## **Retirement Housing Perspective 2: Looked After, Companionship and Consistency**

This perspective wants to be looked after and protected (#10: +4) by a court manager (#1: +6) who should live on-site if possible (#2: +2) but definitely should not be just part-time (#3: -5). Having a pull-cord or pendant to call for help in an emergency is also a great source of assurance (#21: +4).

This perspective, in common with the 'Secure, Connected and Orderly' perspective still wants to have their own home and own front door (#24: +6), to feel safe and secure (#17: +5) and to be treated with dignity and respect (#31: +5).

This point of view is more concerned and positive about the people and relationships that are formed within Retirement Housing. They appreciate both the companionship of their neighbours (#8: +2) and the consistency of service from good staff (#3: +3). But this does not mean that living around people of a similar age and outlook is not seen as either

all good or all bad (#11: 0, #23: 0). There are certainly downsides, that are common across both perspectives, in terms of bad behaviour from other residents (#32: -6), gossip (#35: -6/-5) and lack of respect for privacy (#34: -5).

Although this perspective wants to be looked after, they share the view of the more independent minded 'Secure, Connected and Orderly' perspective, that Retirement Housing is not a suitable setting for residents with dementia or who need looking after (#36: -2). This perspective, however, is even more convinced that Retirement Housing is not a suitable setting for people to have dogs, cats or other pets (#13: -4) possibly suggesting that attitudes towards pets might be regarded as an indicator of the level of independence an person expects and is able to exercise.

### Distinctive and Consensus Statements and Intensity of Preference

Table 8A.3 shows the 21 out of 50 statements that are distinctive of one or other of the Retirement Housing Second Order Perspectives with rankings differing by at least two positions (including 8 statements three or more places apart marked with an asterisk \*).

**Table 8A.3: Distinctive Statements for Retirement Housing Second Order Analysis**

	<b>P1</b> Secure, Connected & Orderly	<b>P2</b> Looked After, Companionship & Consistency
#1 A court manager to turn to if you need help and advice	+4	+6
#10 Peace of mind the comes from being looked after *	-1	+4
#21 Pull-cord or pendant to summon help in an emergency *	+1	+4
#48 Good staff provide consistency of service	+1	+3
#2 A resident manager or warden who lives on-site *	-4	+2
#8 Companionship of neighbours so you are never lonely	0	+2
#14 Having security of tenure *	+5	+2
#12 Occupancy restricted to only retired people aged over 65 *	-3	+1
#43 Everyone is kept informed and up to date about local plans and activities	-1	+1
#9 Use of a communal lounge and other shared facilities	-1	+1
#44 Information about costs and charges is correct, clear and comprehensive	+2	0
#40 Buildings and gardens are kept clean and tidy	+2	0
#39 Properties and facilities are modern and well-designed	+1	-1
#33 Residents who take control and assume responsibility for organising things	-4	-2
#22 Sufficient car parking spaces	0	-2
#30 Residents are engaged and able to exercise choice and control	0	-2
#18 A garden or balcony so you can sit out in private *	+1	-2
#20 Availability of a good internet connection and/or wifi *	+2	-3
#26 Being seen as a form of care home	-6	-4
#13 Residents are able to have dogs, cats or other pets *	+1	-4
#3 A court manager who is only employed on a part-time basis	-3	-5

Table 8A.4 shows the other 39 statements where the ranking for the two Retirement Housing Perspectives is less than two positions apart and hence are indicative of a consensus position.

**Table 8A.4: Consensus Statements for Retirement Housing Second Order Analysis**




	<b>P1</b> Secure, Connected & Orderly	<b>P2</b> Looked After, Companionship & Consistency
#24 You have your own home with your own front door	+6	+6
#17 Feeling safe and secure	+6	+5
#31 Residents are treated with dignity and respect	+5	+5
#16 An effective and efficient heating and hot water system	+4	+4
#28 Independent living	+4	+3
#5 No need to worry about maintenance and repairs	+3	+3
#6 Repairs or problems are addressed and fixed quickly	+3	+3
#27 Freedom to live as you choose: no requirement to join in or conform	+3	+2
#42 Checks on fire, electrical, gas, asbestos and water safety	+3	+2
#4 Close to shops, amenities and transport	+2	+1
#15 A communal laundry room with washers and dryers	+2	+1
#25 In a nice area with attractive surroundings	0	+1
#29 Able to have your say and raise matters with senior management	+1	0
#7 The appearance of the Court creates a good impression	0	0
#23 Community spirit and friendship with people of similar age and outlook	0	0
#11 Living around people of a similar age and outlook	-1	0
#50 Guest room available for visitors	-1	-1
#41 Contemporary kitchens and bathrooms	-1	-1
#19 Social events and activities to get involved in	-2	-1
#45 Wide doors, that are easy to open, for people with reduced mobility	-2	-1
#46 A reliable lift	-2	-1
#36 Residents with dementia or who need to be looked after	-2	-2
#47 A suitable storage area for buggies and other large items	-2	-3
#37 Living in close proximity to others in a compact community	-3	-3
#49 Common lounge used by external organisations and groups	-3	-3
#38 Small flats	-4	-4
#34 People don't respect privacy or confidentiality	-5	-5
#35 Gossip spreads quickly	-5	-6
#32 Some other residents behave badly	-6	-6



Figure 8A.4 shows the statements plotted on a grid according to the intensity of the preference expressed and the degree of difference between the two second order perspectives.

Figure 8A.4: Grid of Degree of Difference and Grading of Statements for Retirement Housing Second Order Perspectives

**Degree of Difference Between Perspective 1 and Perspective 2**

	Looked After Companionship and Consistency						Secure, Connected and Orderly						
	6	5	4	3	2	1	0	1	2	3	4	5	6
+6					#1		#24	#17					
+5							#31			#14			
+4		#10		#21			#16	#28					
+3					#48		#5, #6	#27, #42					
+2					#8			#4, #15	#40, #44				
+1					#9, #43			#25, #29	#39				
0							#7, #23						
-1							#41, #50	#11					
-2				#18	#22, #30		#36	#19, #45, #46					
-3		#20				#47	#37, #49				#12		
-4							#38		#33			#13	#2
-5					#3		#34						
-6						#35	#32		#26				

This grid shows the 32 statements in the central column of the grid that are not strongly distinctive of either of the Second Order perspectives. Of these eleven are positive things that Retirement Housing residents generally want (shown shaded green ), ten are things that Retirement Housing residents are neutral or indifferent about (shown shaded yellow ) and eleven are negative things that Retirement Housing residents generally did not like or want (shown shaded pink ). These provide an indication to providers of Retirement Housing of the things that they might want to ensure they continue to do (or address if they are not doing so already), things they should stop doing or providing and seek to eliminate, and things that they should question the merits and justification of doing.

The statements more positively associated with Retirement Housing Second Order Perspective 1 (Secure, Connected and Orderly) are shown on the grid shaded red . Three of these are positive things that are more strongly supported by Perspective 1 (i.e. #14, #40 and #44) and five are things that are negative for Perspective 1 but more so for Perspective 2 (i.e. #3, #20, #18, #22 and #30). The statements more positively associated with Retirement Housing Second Order Perspective 2 (Looked After, Companionship and Consistency) are shown on the grid shaded blue . Five of these are positive things that are more strongly supported by Perspective 2 (i.e. #1, #10, #21, #48 and #8) and five are things that are negative for Perspective 2 but more so for Perspective 1 (i.e. #26, #13, #2, #33 and #12).

These distinctions between the two second order perspectives might help to give focus and substance to questions about who and what Retirement Housing provision is intended to be for and whether the focus should be more on one or other of these perspectives, or if it is possible or desirable to try to address both perspectives as is the case at present.

## 8A.4 Comparison of Extra Care and Retirement Housing Perspectives

The headline descriptions and designations of the perspectives derived from the second order analysis suggest there might be a comparability between the alternate perspectives identified for Extra Care and Retirement Housing.

- Does Extra Care Perspective 1 ‘Independent, Secure and Connected’ relate to Retirement Housing Perspective 1 ‘Secure, Connected and Orderly’?
- Does Extra Care Perspective 2 ‘Cared For, Helped and Included’ correspond with Retirement Housing Perspective 2 ‘Looked After, Companionship and Consistency’?

Because the Q Set for Extra Care had four additional statements not included in the Q Set for Retirement Housing and hence a different scoring grid, it is not possible to undertake a direct statistical comparison of the results for the two sets of studies. A comparison of the Extra Care and Retirement Housing results can, however, be undertaken based on a simple noting of similarities or differences in the positioning of particular statements.

- **Consistently Positive or Negative Statements**

As has already been noted above (in Section 8A.2 and 8A.3) there are a considerable number of statements that are positioned consistently for both of the second order perspectives for Extra Care or Retirement Housing. For some statements this consistency appears to be common to both Extra Care and Retirement Housing. There are six statements that appear in the highest ranked fifteen statements of things that participants most like and want across all four second order perspectives (i.e. Extra Care Perspectives 1 and 2 and Retirement Housing Perspectives 1 and 2). These are shown in Table 8A.5.

**Table 8A.5: Statements Ranked in Top 15 Priorities for All Second Order Perspectives from Extra Care and Retirement Housing**

	Statements ranked in top 15 priorities for all Perspectives	EC P1	EC P2	RH P1	RH P2
17	Feeling safe and secure	5	6	6	5
24	You have your own home with your own front door	6	3	6	6
31	Residents are treated with dignity and respect	4	5	5	5
1	A court manager to turn to if you need help and advice	4	4	4	6
16	An effective and efficient heating and hot water system	4	2	4	4
42	Checks on fire, electrical, gas, asbestos and water safety	2	2	3	2



There are also seven statements that are in the ten lowest ranked statements of things that participants do not like or want across all four second order perspectives. These are shown in Table 8A.6.

**Table 8A.6: Statements Ranked in Bottom 10 Priorities for All Second Order Perspectives from Extra Care and Retirement Housing**

	Statements ranked in bottom 10 priorities for all Perspectives	EC P1	EC P2	RH P1	RH P2
32	Some other residents behave badly	-6	-6	-6	-6
35	Gossip spreads quickly	-6	-5	-5	-6
34	People don't respect privacy or confidentiality	-5	-5	-5	-5
38	Small flats	-4	-6	-4	-4
26	Being seen as a form of care home	-4	-3	-6	-4
3	A court manager who is only employed on a part-time basis	-5	-3	-3	-5
49	Common lounge used by external organisations and groups	-3	-4	-3	-3

This indicates that there is a considerable degree of consistency of preference both within and between Extra Care and Retirement Housing about what residents want and don't want and provides a strong message about the things that need to be promoted and maintained or minimised and avoided. This also gives some support to the earlier observation that there appears to be a greater consistency and uniformity of view about the things that residents do not like than about the things they do want.

- **Comparison of Perspective 1 and Perspective 2 Positions**

Table 8A.7 shows the ranking of each statement for the Second Order Perspectives of Extra Care and Retirement Housing plus the differences between the Extra Care Perspectives 1 and 2 and the Retirement Housing Perspectives 1 and 2 and also the differences between the Perspective 1 positions and the Perspective 2 positions across Extra Care and Retirement Housing.

The comparison of the Perspective 1 positions for Extra Care and Retirement Housing and the Perspective 2 positions for Extra Care and Retirement Housing shows that there are just eight statements where statements in the factor arrays for Perspective 1 of Extra Care and Retirement Housing or Perspective 2 of Extra Care and Retirement Housing are more than 2 positions apart. These are shown in Table 8A.8.

**Table 8A.7: Comparison of Factor Q-Sort Values for Statements in the Perspectives from Second Order Analysis for Extra Care and Retirement Housing**

		~ EC	EC P1	EC P2	~ P1	~ P2	RH P1	RH P2	~ RH
1	A court manager to turn to if you need help and advice	0	4	4	0	2	4	6	2
2	A resident manager or warden who lives on-site	1	-3	-2	1	4	-4	2	6
3	A court manager who is only employed on a part-time basis	2	-5	-3	2	2	-3	-5	2
4	Close to shops, amenities and transport	0	-1	-1	3	2	2	1	1
5	No need to worry about maintenance and repairs	3	1	4	2	1	3	3	0
6	Repairs or problems are addressed and fixed quickly	1	2	1	1	2	3	3	0
7	The appearance of the Court creates a good impression	1	1	0	1	0	0	0	0
8	Companionship of neighbours so you are never lonely	3	-1	2	1	0	0	2	2
9	Use of a communal lounge and other shared facilities	4	-2	2	1	1	-1	1	2
10	Peace of mind that comes from being looked after	2	1	3	2	1	-1	4	5
11	Living around people of a similar age and outlook	2	-1	1	0	1	-1	0	1
12	Occupancy restricted to only retired people aged over 65	3	-4	-1	1	2	-3	1	4
13	Residents are able to have dogs, cats or other pets	3	-1	-4	2	0	1	-4	5
14	Having security of tenure	6	6	0	1	2	5	2	3
15	A communal laundry room with washers and dryers	1	0	-1	2	2	2	1	1
16	An effective and efficient heating and hot water system	2	4	2	0	2	4	4	0
17	Feeling safe and secure	1	5	6	1	1	6	5	1
18	A garden or balcony so you can sit out in private	0	-1	-1	2	1	1	-2	3
19	Social events and activities to get involved in	3	0	3	2	4	-2	-1	1
20	Availability of a good internet connection and/or wifi	5	1	-4	1	1	2	-3	5
21	Pull-cord or pendant to summon help in an emergency	3	2	5	1	1	1	4	3
22	Sufficient car parking spaces	3	0	-3	0	1	0	-2	2
23	Community spirit and friendship with people of similar age and outlook	0	1	1	1	1	0	0	0
24	You have your own home with your own front door	3	6	3	0	3	6	6	0
25	In a nice area with attractive surroundings	1	0	1	0	0	0	1	1
26	Being seen as a form of care home	1	-4	-3	2	1	-6	-4	2
27	Freedom to live as you choose: no requirement to join in or conform	2	3	1	0	1	3	2	1
28	Independent living	5	5	0	1	3	4	3	1
29	Able to have your say and raise matters with senior management	2	2	0	1	0	1	0	1
30	Residents are engaged and able to exercise choice and control	2	0	2	0	4	0	-2	2
31	Residents are treated with dignity and respect	1	4	5	1	0	5	5	0
32	Some other residents behave badly	0	-6	-6	0	0	-6	-6	0
33	Residents who take control and assume responsibility for organising things	0	-2	-2	2	0	-4	-2	2
34	People don't respect privacy or confidentiality	0	-5	-5	0	0	-5	-5	0
35	Gossip spreads quickly	1	-6	-5	1	1	-5	-6	1
36	Residents with dementia or who need to be looked after	3	-3	0	1	2	-2	-2	0
37	Living in close proximity to others in a compact community	2	-3	-1	0	2	-3	-3	0
38	Small flats	2	-4	-6	0	2	-4	-4	0
39	Properties and facilities that are modern and well designed	1	0	-1	1	0	1	-1	2
40	Buildings and gardens are kept clean and tidy	0	0	0	2	0	2	0	2
41	Contemporary kitchens and bathrooms	1	-1	-2	0	1	-1	-1	0
42	Checks on fire, electrical, gas, asbestos and water safety	0	2	2	1	0	3	2	1
43	Everyone is kept informed and up to date about local plans and activities	1	1	0	2	1	-1	1	2
44	Information about costs and charges is correct, clear and comprehensive	3	1	-2	1	2	2	0	2
45	Wide doors, that are easy to open, for people with reduced mobility	1	2	1	4	2	-2	-1	1
46	A reliable lift	2	3	1	5	2	-2	-1	1
47	A suitable storage area for buggies and other large items	1	-1	-2	1	1	-2	-3	1
48	Good staff who provide consistency of service	1	3	4	2	1	1	3	2
49	Common lounge used by external organisations and groups	1	-3	-4	0	1	-3	-3	0
50	Guest room available for visitors	1	-2	-3	1	2	-1	-1	0
51	Care staff on-site 24 hours 7 days a week if needed (EC)	3	3	6					
52	An on-site restaurant (EC)	3	0	3					
53	Hairdressing salon on-site (EC)	2	-2	0					
54	An accessible bath for those that want or need it (EC)	1	-2	-1					

**Table 8A.8: Statements where the Perspective 1 positions or Perspective 2 positions for Extra Care and Retirement Housing are more than 2 places apart.**

	EC P1	EC P2	Difference P1s	Difference P2s	RH P1	RH P2
#2. A resident manager or warden who lives on-site	-3	-2	1	4	-4	2
#4. Close to shops, amenities and transport	-1	-1	3	2	2	1
#19. Social events and activities to get involved in	0	3	2	4	-2	-1
#24. You have your own home with your own front door	6	3	0	3	6	6
#28. Independent living	5	0	1	3	4	3
#30. Residents are engaged and able to exercise choice and control	0	2	0	4	0	-2
#45. Wide doors, that are easy to open, for people with reduced mobility	2	1	4	2	-2	-1
#46. A reliable lift	3	1	5	2	-2	-1

**#2. A resident manager or warden who lives on-site**

Extra Care has care staff on-site 24 hours 7 days a week if needed (#51) and this is particularly highly rated by Extra Care Perspective 2 (+6), but as a consequence even Extra Care residents who specifically want to be ‘Cared For, Helped and Included’ are unlikely to see the need or value of also having a resident manager or warden who lives on-site (#2). For some residents of Retirement Housing the presence of an on-site manager is seen to provide additional reassurance that there will be someone there to help in an emergency. This is thus a statement that perhaps only resonates with residents of Retirement Housing, but as has been seen in Chapters 6 and 7 above, this is also a matter of some contention within Retirement Housing not only between the different perspectives but also between different sites.

**#4. Close to shops, amenities and transport**

Although there were differences of view at some Extra Care sites (e.g. EC Site 1 range from +3 to -4), there was a general a consensus across the two Extra Care Second Order Perspectives that being close to shops, amenities and transport (#4) is not a priority with a score of -1 for both Perspective 1 and Perspective 2. Access to shops, amenities and transport is more important for both Retirement Housing Perspectives, but especially for the ‘Secure, Connected and Orderly’ Retirement Housing Perspective 1. The Second Order Retirement Housing Perspectives do though appear to mask some of the differences of perspective on this issue that were evident at particular Retirement Housing Sites (e.g. Sites C, H and J) and within the Combined Retirement Housing results (-1 to +3). The difference in preference to be close to shops, amenities and transport between Extra Care and Retirement Housing residents may be because Extra Care residents are generally much less mobile and more dependent on others for help and as a consequence are not so concerned about having amenities close by.

**#19. Social events and activities to get involved in**

The scores for #19 (Social events and activities to get involved in) are higher for both Extra Care Second Order Perspectives 2 than for either of the Retirement Housing Second Order Perspectives. This may be a consequence of the nature of the communal facilities and availability of care staff that make social events and activities more of a fundamental part of what is desired from Extra Care. It may alternatively be linked to the characteristics, circumstances and ability of residents of Retirement Housing to be more autonomous, independent and mobile that allows them to look beyond the Court where they live for social engagement and stimulation.

#### **#24. You have your own home with your own front door**

#### **#28. Independent living**

Having your own home with your own front door (#24) is a clear demonstration of independent living (#28). Whilst these are important concerns for Extra Care Perspective 1 and Retirement Housing Perspectives 1 and 2, it appears that the emphasis of Extra Care Perspective 2 is on being 'Cared For, Helped and Included' rather more than on maintaining control of their own home and independence.

#### **#30. Residents are engaged and able to exercise choice and control**

Extra Care Perspective 1 and Retirement Housing Perspective 1 both have a neutral view and give a score of 0 to being engaged and having the ability to exercise choice and control (#30). Extra Care Perspective 2 is more positive about this giving it a score of +2 while Retirement Housing Perspective 2 is more negative with a score of -2. The reason for this divergence of view might be because of differences in understanding about the nature of what the engagement is about and what is to be controlled. Residents indicative of Extra Care Perspective 2 ('Cared For, Helped and Included') may be keen to be involved in and have a say about the nature of their own care, whereas residents associated with Retirement Housing Perspective 2 ('Looked After, Companionship and Consistency') do not receive a care service and may prefer the Court Manager to make decisions about the organisation and management of the facilities on their behalf.

#### **#45. Wide doors, that are easy to open, for people with reduced mobility**

#### **#46. A reliable lift**

It appears that a reliable lift (#46) and wide doors to help those with reduced mobility (#45) are a higher priority for Extra Care Perspective 1 ('Independent, Secure and Connected') than Extra Care Perspective 2 ('Cared For, Helped and Included'). This might be because those Extra Care residents with Perspective 2 are more likely to have the help of care workers to move about, whereas those with Perspective 1 may be required to get around on their own. Residents of Retirement Housing are generally more mobile and independent than those living in Extra Care and residents aligned with Retirement Housing Perspective 1 ('Secure, Connected and Orderly') may not have any mobility issues so see not advantage in having wide doors or a lift, while those with Retirement Housing Perspective 2 ('Looked After, Companionship and Consistency') may be a little less negative about these features because they make life easier for them. This might explain the particular divergence in the Perspective 1 positions for Extra Care and Retirement Housing.

This analysis also indicates that there may be more differences in understanding between what being looked after and cared for means between Extra Care and Retirement Housing than is the case between residents wanting to be secure, connected and independent in these settings.

Table 8A.9 compares the statements with the greatest differences between the Second Order perspectives for Extra Care and Retirement Housing.

Table 8A.9: Comparison of Statements Indicative of Differences Between Second Order Perspectives for Extra Care and Retirement Housing.

<b>EC P1: Independent, Secure and Connected</b>		<b>RH P1: Secure, Connected and Orderly</b>	
20	Availability of a good internet connection and/or wifi	13	Residents are able to have dogs, cats and other pets
28	Independent living	20	Availability of a good internet connection and/or wifi
13	Residents are able to have dogs, cats and other pets	14	Having security of tenure
14	Having security of tenure	18	A garden or balcony so you can sit out in private
44	Information about costs and charges is correct, clear and comprehensive	3	A court manager who is only employed on a part-time basis
24	You have your own home with your own front door	22	Sufficient car parking spaces
22	Sufficient car parking spaces	17	Feeling safe and secure
46	A reliable lift	30	Residents are engaged and able to exercise choice and control
29	Able to have your say and raise matters with senior management	44	Information about costs and charges is correct, clear and comprehensive
16	An effective and efficient heating and hot water system	39	Properties and facilities that are modern and well-designed
41	Contemporary kitchens and bathrooms	27	Freedom to live as you choose: no requirement to join in or conform
27	Freedom to live as you choose: no requirement to join in or conform	40	Buildings and gardens are kept clean and tidy
39	Properties and facilities that are modern and well-designed	47	A suitable storage area for buggies and other large items
6	Repairs or problems are addressed and fixed quickly	5	No need to worry about maintenance and repairs
50	Guest room available for visitors	4	Close to shops, amenities and transport
<b>EC P2: Cared For, Helped and Included</b>		<b>RH P2: Looked After, Companionship and Consistency</b>	
21	Pull-cord or pendant to summon help in an emergency	2	A resident manager or warden who lives on-site
9	Use of a communal lounge and other shared facilities	12	Occupancy restricted to only retired people aged over 65
12	Occupancy restricted to only retired people aged over 65	10	Peace of mind that comes from being looked after
36	Residents with dementia or who need to be looked after	21	Pull-cord or pendant to summon help in an emergency
51	Care staff on-site 24 hours 7 days a week if needed (EC)	1	A court manager to turn to if you need help and advice
11	Living around people of a similar age and outlook	33	Residents who take control and assume responsibility for organising things
8	Companionship of neighbours so you are never lonely	19	Social events and activities to get involved in
52	An on-site restaurant (EC)	26	Being seen as a form of care home
3	A court manager who is only employed on a part-time basis	43	Everyone is kept informed and up to date about local plans and activities
19	Social events and activities to get involved in	9	Use of a communal lounge and other shared facilities
17	Feeling safe and secure	8	Companionship of neighbours so you are never lonely
37	Living in close proximity to others in a compact community	11	Living around people of a similar age and outlook
5	No need to worry about maintenance and repairs	45	Wide doors, that are easy to open, for people with reduced mobility
10	Peace of mind that comes from being looked after	25	In a nice area with attractive surroundings
53	Hairdressing salon on-site (EC)	48	Good staff who provide consistency of service
<b>Colour Code</b>			
	Comparability of EC perspective 1 with RH Perspective 1		Comparability of EC Perspective 2 with RH Perspective 1
	Comparability of EC Perspective 2 and RH Perspective 2		EC Only Statements

Seven of the fifteen statements that are most supported by Extra Care Perspective 1 relative to Perspective 2 are also amongst the fifteen statements that are most supported by Retirement Housing Perspective 1 in comparison with Perspective 2. These statements that are positive indicators of both Extra Care Perspective 1 and Retirement Housing Perspective 1 are:

- #20. Availability of a good internet connection and/or wifi
- #13. Residents are able to have dogs, cats or other pets
- #14. Having security of tenure
- #44. Information about costs and charges is correct, clear and comprehensive
- #22. Sufficient car parking spaces
- #27. Freedom to live as you choose: no requirement to join in or conform
- #39. Properties and facilities are modern and well-designed

There are also seven out of the fifteen statements that are most favoured by Extra Care Perspective 2 relative to Perspective 1 are amongst the fifteen statements most favoured by Retirement Housing Perspective 2 relative to Perspective 1. These statements that are positive indicators for both Extra Care Perspective 2 and Retirement Housing Perspective 2 are:

- #12. Occupancy restricted to retired people aged over 65
- #10. Peace of mind that comes from being looked after
- #21. Pull-cord or pendant to summon help in an emergency
- #19. Social events and activities to get involved in
- #9. Use of a communal lounge and other shared facilities
- #8. Companionship of neighbours so you are never lonely
- #11. Living around people of a similar age and outlook

However, the statements and issues that distinguish Perspective 1 from Perspective 2 across Extra Care and Retirement Housing are not absolutely aligned. There are three statements amongst the fifteen that are most supported by Retirement Housing Perspective 1 relative to Perspective 2 that are also amongst the fifteen most favoured by Extra Care Perspective 2 relative to Extra Care Perspective 1. These are:

- #3. A court manager who is only employed on a part-time basis
- #17. Feeling safe and secure
- #5. No need to worry about maintenance and repairs

These statements create an apparently curious alignment between the 'Cared For, Helped and Included' position of Extra Care Perspective 2 and the 'Secure, Connected and Orderly' view of Retirement Housing Perspective 1 and serve to emphasise the importance of any analysis also taking account of the context and potential for different interpretations to be applied to statements.

### **#3. A court manager who is only employed on a part-time basis**

A part-time court manager (#3) might not seem to be too problematic to Retirement Housing Perspective 1 and Extra Care Perspective 2 for very different reasons. In the case of Retirement Housing Perspective 1 it may be because residents who consider themselves to be reasonably autonomous and independent do not see the necessity for a full-time court manager, whereas in the case of Extra Care Perspective 2 they have so much contact and support from the care staff on-site 24 hours 7 days a week that they do not rely on the court manager being always available.

### **#17. Feeling safe and secure**

For Perspective 1 of Retirement Housing 'secure' may be the more significant and operative element of statement #17 (Feeling safe and secure) in terms of having security of tenure (#14) and of their own home with their own front door (#24), whereas for Extra Care Perspective 2 it might be the desire to be kept 'safe' that is most relevant along with access to help in an emergency (#21) and reassurance of care staff on site 24 hours 7 days a week (#51).

### **#5. No need to worry about maintenance and repairs**

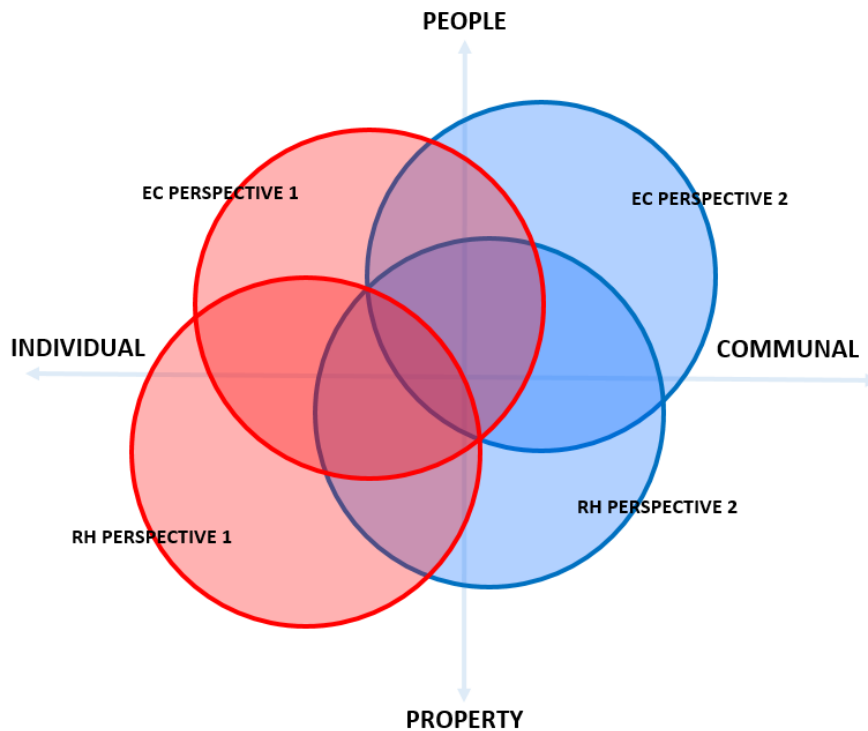
For #5 (No need to worry about maintenance and repairs) the difference might be a consequence of Extra Care Perspective 2 being focused on avoiding the need to worry while Perspective 1 of Retirement Housing is seeing the benefit and convenience of having repairs and maintenance organised for them.

- **Summary of Comparability of Extra Care and Retirement Housing**

Although each of the Perspectives has its own distinctive characteristics and idiosyncrasies there does seem to be a significant degree of alignment both between the Perspective 1 and 2 positions for Extra Care and Retirement Housing and also between the two sets of Second Order Perspectives of Extra Care and Retirement Housing (i.e. Perspective 1 of Extra Care with Perspective 1 of Retirement Housing and Perspective 2 of Extra Care with Perspective 2 of Retirement Housing).

The overall impression and balance of statement scores indicates that the Extra Care Perspectives are relatively more 'people' focused than those of Retirement Housing Perspectives that are more 'property' focused. It also seems as though the Perspective 1s for both Extra Care and Retirement Housing are more influenced by 'individual' issues than the Perspective 2s for both Extra Care and Retirement Housing that are more focused on 'communal' matters. The classification of these suggested orientations is proposed based on the framework used to map the dimensions of the Q Set in Section 4B above and is illustrated by Figure 8A.5, but this is noted with some significant caveats because it is far too generic and fails to give sufficient recognition to the multiple personal and site based considerations that are likely to influence individual preferences and dispositions.

**Figure 8A.5: Indicative Mapping of Second Order Perspectives for Extra Care and Retirement Housing on axes of ‘Individual – Communal’ / ‘People – Property’**



## **8B: The Significance of Demographic Influences**

### **8B.1 Caution in Consideration of Demographic Influences**

It was acknowledged in Section 5C that the resident participants for this research were opportunistically rather than randomly selected. So, even though a considerable number of participants have been engaged in this study and their demographic profile in terms of age, length of tenure, relationship status and gender is broadly consistent with the profile of residents in Housing 21’s Extra Care and Retirement Housing properties and the demographic profile across the study sites, it cannot be claimed that the sample is necessarily representative. However, the reason for considering the demographic characteristics of participants alongside the perspectives identified is not to try and establish a causal link or to prove an association between them, but merely to identify patterns of perspective and relationships that may be of interest and worthy of further investigation. The question this Section seeks to consider is whether it is likely that distinctions between the perspectives of residents might be attributable to their demographic characteristics.



## 8B.2 Age Considerations

The age profile of participants is provided in Appendix 5. The approximate mid-point in the age range for both Extra Care and Retirement Housing is at 75 years, so for the purpose of this assessment, the completed Q Sorts from resident participants from both Extra Care and Retirement Housing were split into two groups according to whether the participants were aged under 75 or aged 75 and over.

- **Extra Care Age Analysis**

Of the 68 Extra Care participants 30 were aged under 75 and 38 aged 75 and over. The results from these two groups of participants were entered into PQ Method to try to define the perspectives associated with each age group.

For the 30 Extra Care participants aged under 75 it was possible to identify two perspectives that provided explanation of 55% of the variation in the sorts, but which had a correlation of 0.74. Two perspectives were also identified for the 38 Extra Care participants aged 75 or over that provided 51% explanation of the variation in the sorts, but with a correlation of 0.78. Because of the high correlation between the perspectives in both the under 75 and the 75 and over age groups, it was considered appropriate to consider and compare the results on the basis of a single centroid (i.e. one perspective) solution for each age group. The single centroid solution for the Extra Care under 75 age group provided an explanation for 50% of variation between the sorts with 28 out of 30 participants loading on this solution with at least a 0.5 level of significance, while for the Extra Care 75 or over age group the single centroid results provided an explanation for 48% of variation with 35 out of 38 participants loading on this solution with at least a 0.5 significance level. The single centroid results were therefore considered to provide a credible basis for analysis and are shown in Appendix 21.

The correlations between the Extra Care participants aged under 75 and those aged 75 or older with the Extra Care Second Order Perspectives are shown in Table 8B.1.

**Table 8B.1: Correlations of Extra Care Second Order Perspectives 1 and 2 and Single Centroid Arrays for Extra Care Participants Aged Under 75 and 75 or Older.**

	EC Perspective 1	EC Perspective 2	EC Under 75	EC 75 or Older
EC Perspective 1	1.00	.71	.93	.83
EC Perspective 2	.71	1.00	.89	.89
EC Under 75	.93	.89	1.00	.94
EC 75 or Older	.83	.89	.94	1.00

There is a distinction between Extra Care Perspectives 1 and 2 with a 0.71 correlation, but a very much stronger (0.94) alignment between the Extra Care participants aged under 75 and those aged 75 or older. There is a closer correlation between the Extra Care participants aged under 75 with Perspective 1 (0.93) than with Perspective 2 (0.83), but for Extra Care participants aged 75 or over the correlation is the same (0.89) for both Perspective 1 and 2. This suggests that whilst there may be some link between younger Extra Care participants and Extra Care Perspective 1 (Independent, Secure and Connected) that does not appear to translate into a stronger connection between older Extra Care residents and Extra Care Perspective 2 (Cared For, Helped and Included) and overall the correlation between the Extra Care age groups is stronger than the association with either of the Second Order Perspectives.

The relative scores for each statement in the arrays of the single centroid perspectives of the Extra Care under 75 age group and the 75 and over age group were also compared with the statement scores in the arrays for Perspective 1 and Perspective 2 from the Extra Care Second Order Analysis. The results from the Retirement Housing second order analysis are also shown in Appendix 19. Table 8B.2 shows the 4 statements that appeared to suggest a link or relationship between Extra Care Perspective 1 with Extra Care aged under 75 perspective and between Extra Care Perspective 2 with Extra Care aged 75 or over perspective.

**Table 8B.2: Statements of alignment between Extra Care Second Order Perspective 1 and Participants Aged Under 75 and Second Order Perspective 2 and Participants Aged 75 and Older.**

	Perspective 1	Perspective 2	<75	≥75
#13: Residents are able to have dogs, cats or other pets	-1	-4	-2	-4
#21: Pull-cord or pendant to summon help in an emergency	+2	+5	+3	+6
#28: Independent Living	+5	0	+5	+3
#36: Residents with dementia or who need to be looked after	-3	0	-3	-1

This suggests that older Extra Care residents (aged 75 or over) are more likely to demonstrate the preferences associated with Second Order Perspective 2 (Cared For, Helped and Included) of being opposed to residents with pets, but valuing the provision of a pull-cord to summon help in an emergency and that younger Extra Care residents (aged under 75) are more likely to demonstrate preferences associated with Second Order Perspective 1 (Independent, Secure and Connected) of wanting to maintain their independence and not have residents with dementia.

There were a further 13 statements that were also potentially consistent with an alignment of participants aged under 75 with Second Order Perspective 1 and those aged 75 or older with

Perspective 2, however, there were 16 statements that were inconsistent with this alignment and 21 statements where there was no clear difference in the scores. This statement by statement comparison of the arrays thus does not appear to establish a strong link or relationship between Extra Care Perspective 1 (Independent, Secure and Connected) and younger Extra Care residents (aged under 75) and between Extra Care Perspective 2 (Cared For, Helped and Included) and older Extra Care residents (aged 75 or older).

In the analysis of the Combined Extra Care results (in Section 6A.2) it was noted that residents loading on Combined Perspective 1 (Engaged, Independent and In Control) tended to be younger with over half aged under 75 and that residents loading on Combined Perspective 2 (Care, Companionship and Peace of Mind) tended to be older with 80% aged over 85. Although Combined Extra Care Perspective 1 has a 0.78 correlation with Second Order Perspective 1 (Independent, Secure and Connected) it also had a lower, but still significant, 0.51 association with Second Order Perspective 2 (Cared For, Helped and Included). Combined Extra Care Perspective 3 had a stronger 0.85 Correlation with Second Order Perspective 1, but gender (male) and relationship status (living with a partner) appeared to be more relevant characteristics than the age of the participants loading on this Perspective. Combined Extra Care Perspective 2 does though have a strong 0.92 correlation Second Order Perspective 2 (Care, Companionship and Peace of Mind).

The overall assessment suggests that whilst age may play some part in the likelihood of younger (aged under 75) Extra Care residents supporting the position of Second Order Perspective 1 (Independent, Secure and Connected) and older (aged 75 or older) Extra Care residents being aligned with Second Order Perspective 2 (Care, Companionship and Peace of Mind) this does not appear to be a primary or strong association and there are certainly other factors and considerations involved in determining the preferences other than their age.

- **Retirement Housing Age Analysis**

Of the 157 Retirement Housing participants 77 were aged under 75 and 80 were aged 75 and over. The results from these two groups of participant were entered into PQ Method to try to define the perspectives associated with each age group.

For the 77 Retirement Housing participants aged under 75 it was possible to identify three perspectives that provided explanation of 51% of the variation in the sorts, but these all had correlations with one another of over 0.65. For the 80 Retirement Housing participants aged 75 or over it was only possible to identify two perspectives which provided an explanation for 45% of variation but with a correlation of 0.79. Because of the high correlation between the

perspectives in both the under 75 and the 75 or over age groups it was considered appropriate to consider and compare the results on the basis of a single centroid (i.e. one perspective) solution for each age group. The single centroid solution for the Retirement Housing under 75 age group provided an explanation for 42% of variation between the sorts with 68 out of 77 participants loading on this solution with at least a 0.5 level of significance, while for the Retirement Housing 75 and over age group the single centroid results provided an explanation for 40% of variation with 69 out of 80 participants loading on this solution with at least a 0.5 significance level. The single centroid results were therefore considered to provide a credible basis for analysis and are shown in Appendix 21.

The correlations between the Retirement Housing participants aged under 75 and those aged 75 or older with the Retirement Housing Second Order Perspectives are shown in Table 8B.3.

**Table 8B.3: Correlations of Retirement Housing Second Order Perspectives 1 and 2 and Single Centroid Arrays for Retirement Housing Participants Aged Under 75 and 75 or Older.**

	RH Perspective 1	RH Perspective 2	RH Under 75	RH 75 or Older
RH Perspective 1	1.00	.76	.94	.82
RH Perspective 2	.76	1.00	.87	.97
RH Under 75	.94	.87	1.00	.92
RH 75 or Older	.82	.97	.92	1.00

Although there are many similarities there is also a clear distinction between Retirement Housing Perspectives 1 and 2 with a 0.76 correlation, but there is a much closer (0.92) degree alignment between the Retirement Housing participants aged under 75 and those aged 75 or older. There is, however, an even closer correlation between the Retirement Housing participants aged 75 or older with Perspective 2 (0.97) and between Retirement Housing participants aged under 75 and Perspective 1 (0.94). This suggests that there may be a link or connection between younger Retirement Housing residents and Perspective 1 (Secure, Connected and Orderly) and between older Retirement Housing residents and Perspective 2 (Looked After, Companionship and Consistency).

The relative scores for each statement in the arrays of the single centroid perspectives of the Retirement Housing under 75 age group and the 75 and over age group were also compared with the statement scores in the arrays for Perspective 1 and Perspective 2 from the Retirement Housing Second Order Analysis. The results from the Retirement Housing second order analysis are also shown in Appendix 20.

There are 7 statements that appear to suggest a relationship between Retirement Housing Perspective 2 and Retirement Housing participants aged 75 and over as well as between Retirement Housing Perspective 1 and Retirement Housing participants aged under 75. These are shown in Table 8B.4.

**Table 8B.4: Statements showing alignment between Retirement Housing Second Order Perspective 1 and Participants Aged Under 75 and Second Order Perspective 2 and Participants Aged 75 and Older.**

	Perspective 1	Perspective 2	<75	≥75
#2: A resident manager or warden who lives on-site	-4	+2	-3	0
#8: Companionship of neighbours so you are never lonely	0	+2	0	+2
#10: Peace of mind that comes from being looked after	-1	+4	0	+3
#13: Residents are able to have dogs, cats or other pets	+1	-4	-2	-4
#14: Having security of tenure	+5	+2	+4	+2
#21: Pull-cord or pendant to summon help in an emergency	+1	+4	+2	+5
#22: Sufficient car parking spaces	0	-2	+1	-2

This suggests that older Retirement Housing Care residents (aged 75 or over) are more likely to demonstrate the preferences associated with Second Order Perspective 2 (Looked After, Companionship and Consistency) of being opposed to residents with pets, valuing the provision of a pull-cord to summon help in an emergency, wanting companionship of others and to be looked after. It also suggests that younger Retirement Housing residents (aged under 75) are more likely to demonstrate preferences associated with Second Order Perspective 1 (Secure, Connected and Orderly) of wanting security of tenure, sufficient car parking and not wanting a manager or warden who also lives on the site.

There are a further 12 statements that are supportive of a link, between under 75s and Perspective 1 and 75 and overs with Perspective 2, but where there is a difference of just one place between the positions in the rankings of the two age categories. There are, however, 25 statements where there is no clear age difference between the statements scores for Perspectives 1 and 2 and the scores for the participants under 75 and 75 and 6 statements that are potentially inconsistent with an association and between Retirement Housing Perspective 2 and Retirement Housing participants aged 75 or over or between Retirement Housing Perspective 1 with Retirement Housing participants aged under 75. Despite some statements not indicating any relationship or suggesting a potentially inconsistent effect, the statement by statement analysis does appear to suggest that there may be some basis for investigating whether there might be a link or relationship between Retirement Housing Perspective 1 (Secure, Connected

and Orderly) and younger Retirement Housing residents (aged under 75) and between Retirement Housing Perspective 2 (Looked After, Companionship and Consistency) and older Retirement Housing residents (aged 75 and over).

In the analysis of the Combined Retirement Housing results (in Section 6A.5) it was noted that residents loading on Combined Perspective 1 (Looked After and Dignified) tended to be older with 14% aged over 85 and only 26% aged under 75 and that residents loading on Combined Perspective 2 (Property Maintenance and Independence) tended to be younger with less than a quarter aged 75 or over. The Retirement Housing participants loading on Combined Retirement Housing Perspectives 3 (Respect and Friendship) and 4 (Age and Assurance), however, did not appear to have any particularly obvious age based characteristics.

Combined Retirement Housing Perspective 1, with an older age profile, has a strong 0.805 correlation with Second Order Perspective 2 (Looked After and Dignified) but Combined Retirement Housing Perspective 4 has an even stronger 0.824 correlation without having any obvious age bias amongst the Retirement Housing participants loading on this. Combined Retirement Housing Perspective 2, with a younger age profile does though have a very strong 0.896 correlation with Second Order Perspective 1 (Secure Connected and Orderly). Combined Retirement Housing Perspective 3 with no clear age profile correlates significantly with both Second Order Perspective 1 (0.647) and Second Order Perspective 2 (0.616).

Although far from conclusive, the overall assessment suggests that age may be a factor in determining the likelihood of younger (aged under 75) Retirement Housing residents supporting the position of Second Order Perspective 2 (Secure Connected and Orderly) and older (aged 75 or older) Retirement Housing residents being aligned with Second Order Perspective 1 (Looked After, Companionship and Consistency), but it is likely that there are also other factors and considerations involved in determining the preferences as well as their age.

- **Age and Gender**

For Retirement Housing the proportion of females to males is 65% female and 35% male (102 female participants out of 157) and there is a similar proportion of females to males amongst participants aged under 75 (71% - 50 out of 77) to those aged 75 and over (65% - 52 out of 80). For Extra Care, however, there is a gender imbalance in the age distributions. Overall 43 out of 68 (63%) Extra Care participants are female, but amongst those aged under 75 only 16 out of 30 (53%) are female while for those aged 75 or over 27 out of 38 (71%) are female. Any age related perspective that might have been proposed for Extra Care this could potentially be a consequence of a gender linked characteristic rather than an age based influence. Gender based

considerations are considered below in Section 8B.4. It is though important to remember that any relationships between perspectives cannot be proved to be linked to age or gender and any differences or similarities could alternatively be due to some other unrecorded characteristic or merely have arisen as a consequence of chance.

### **8B.3 Length of Tenure Considerations**

The average length of tenure of participants was indicated in Appendix 5. For residents in Housing 21's Extra Care the average length of tenure is under 3 years but for Retirement Housing it is over 7 years. In order to divide the participants into two approximately equal sized groups based on length of tenure, the split for Extra Care was made between those with under 2 years tenure (36 participants) and those with tenure of 2 years or more (32 participants), while for Retirement Housing the dividing point was taken at under 5 years tenure (86 participants) and 5 years or more (71 participants). Q methodological analysis was undertaken on these two groups for Extra Care and Retirement Housing.

- **Extra Care Tenure Analysis**

For the 36 Extra Care participants that had under 2 years tenure it was possible to identify three perspectives that provided explanation for 56% of the variation in the sorts, but which all had correlations of over 0.71. Similarly three perspectives were identified from the 32 Extra Care participants with tenure of 2 years and over that provided 56% explanation of the variation in the sorts, but all with correlations of over 0.75. Because of the high correlations between the perspectives in both the under 2 years' tenure and the 2 years and over tenure groups, it was considered appropriate to limit consideration and comparison of the results on the basis of a single centroid (i.e. one perspective) solution only. The single centroid solution for under 2 years tenure in Extra Care provided an explanation for 48% of variation between the sorts with 34 out of 36 participants loading on this solution with at least a 0.5 level of significance, while for the Extra Care 2 years or over tenure group the single centroid results provided an explanation for 50% of variation with 29 out of 32 participants loading on this solution with at least a 0.5 significance level. The single centroid results were therefore considered to provide a credible basis for analysis and are shown in Appendix 22.

The correlations between the Extra Care participants with under 2 years of tenure and with 2 years or over with the Extra Care Second Order Perspectives are shown in Table 8B.5

**Table 8B.5: Correlations of Extra Care Second Order Perspectives 1 and 2 and Single Centroid Arrays for Extra Care Participants with Under 2 Years Tenure and Tenure of 2 Years or Over.**

	EC Perspective 1	EC Perspective 2	EC Under 2 Years	EC 2 Years or Over
EC Perspective 1	1.00	.71	.92	.89
EC Perspective 2	.71	1.00	.85	.87
EC Under 2 Years	.92	.85	1.00	.95
EC 2 Years or Over	.89	.87	.95	1.00

As noted above, there is a distinction between Extra Care Perspectives 1 and 2 of 0.71. There is a much higher correlation (0.95) between the Extra Care participants with under 2 years of tenure and those with tenure of 2 years or more. There is a slightly stronger correlation from those with under 2 years of tenure with Extra Care Perspective 1 (Independent, Secure and Connected) (0.92) than with Perspective 2 (Cared For, Helped and Included) (0.85), and a similar but even slighter correlation from those with 2 years or over tenure (0.89 with Perspective 1 and 0.87 with Perspective 2). Overall these correlations did not give the impression of a significant influence or impact of length of tenure as a basis for the distinction between the two Second Order Perspectives for Extra Care.

The arrays from these single centroid perspectives of the Extra Care under 2 years tenure group and the 2 years and over tenure group were compared with the arrays from Perspective 1 and Perspective 2 from the Extra Care Second Order Analysis. There were 16 statements with no difference or a difference of only one position between the scores for Extra Care Perspective 1 and Extra Care Perspective 2 and the solutions for Extra Care under 2 years tenure and Extra Care tenure of 2 years or longer. Although there were 20 statements that might be indicative of a link between Extra Care Perspective 1 with Extra Care under 2 years tenure and between Extra Care Perspective 2 with Extra Care tenure of 2 years or longer but because these associations were inferred based on a difference of just one place they are considered to be too weak to be reliable and there were also 18 statements that appeared inconsistent with a link between Extra Care Perspective 1 with Extra Care under 2 years tenure and between Extra Care Perspective 2 with Extra Care tenure of 2 years or longer. There does not therefore appear to be a strong case for supposing that there is a link or relationship between Extra Care Perspective 1 and a shorter tenure of Extra Care residents and Extra Care residents with a longer tenure and Perspective 2.



- **Retirement Housing Tenure Analysis**

For the 86 Retirement Housing participants with under 5 years tenure three perspectives were identified that provided explanation for 51% of the variation in the sorts, but these all had correlations with one another of over 0.66. For the 71 Retirement Housing participants with tenure of 5 years or over it was only possible to identify two perspectives which provided an explanation for 43% of variation with a correlation of 0.76. Because of the high correlation between the perspectives in both the Retirement Housing under 5 years and 5 years or over tenure age groups it was also considered appropriate to consider and compare the results on the basis of a single centroid (i.e. one perspective) solution only. The single centroid solution for the Retirement Housing under 5 years tenure provided an explanation for 41% of variation between the sorts with 76 out of 86 participants loading on this solution with at least a 0.5 level of significance, while for the Retirement Housing 5 years over tenure group the single centroid results provided an explanation of 40% of variation with 60 out of 71 participants loading on this solution with at least a 0.5 significance level. These results were considered to be sufficient in order for analysis to be based on these single centroid solutions and are shown in Appendix 22.

The correlations between the Retirement Housing participants with tenure of under 5 years and those with five years or more tenure with the Retirement Housing Second Order Perspectives are shown in Table 8B.6.

**Table 8B.6: Correlations of Retirement Housing Second Order Perspectives 1 and 2 and Single Centroid Arrays for Retirement Housing Participants with Under 5 Years Tenure and Tenure of 5 Years or Over.**

	RH Perspective 1	RH Perspective 2	RH Under 5 Years	RH 5 Years or Over
RH Perspective 1	1.00	.76	.91	.86
RH Perspective 2	.76	1.00	.92	.95
RH Under 5 Years	.91	.92	1.00	.97
RH 5 Years or Over	.86	.95	.97	1.00

As noted above, there is a distinction between Retirement Housing Perspectives 1 and 2 of 0.76. There is a much higher (almost total) correlation (0.97) between the Retirement Housing participants with under 5 years of tenure and those with tenure of 5 years or more. There is a stronger correlation from those with 5 years or more tenure with Retirement Housing Perspective 2 (Looked After, Companionship and Consistency) (0.95) than with Perspective 1 (Secure, Connected and Orderly). For those with under 5 years tenure there is little difference in the degree of correlation with Retirement Housing Perspective 1 (0.91) and Perspective 2 (0.92).

Although this does suggest that there is an association between longer tenure in Retirement Housing and Perspective 2 (Looked After, Companionship and Consistency) but, as will be considered below, this might alternatively be due to age or other influences.

The arrays from the single centroid perspectives of the Retirement Housing under 5 years tenure and 5 years and over tenure groups were compared with the arrays for Perspectives 1 and 2 from the Retirement Housing Second Order Analysis. There are 12 statements that are indicative of a potential link between Retirement Housing Perspective 2 (Looked After, Companionship and Consistency) and participants with 5 years or longer tenure and between Retirement Housing Perspective 1 (Secure, Connected and Orderly) with Retirement Housing participants with tenure under 5 years, but of these one statement (#12 Occupancy restricted to only retired people aged over 65) is based on a difference of more than one place in the scoring so for the other 11 the degree of distinction is considered too weak to be reliable. There are also 23 statements where there is no difference or a difference of only one position between the scores for Retirement Housing Perspectives 1 and 2 and the arrays for under 5 years tenure and tenure of 5 years or longer and 15 statements that are inconsistent with an association between Retirement Housing Perspective 2 and participants with 5 years or longer tenure and between Retirement Housing Perspective 1 with Retirement Housing participants with tenure under 5 years. This statement based assessment does not therefore appear to provide a strong case for supposing that there is a link or relationship between Retirement Housing Perspectives 1 and 2 and the tenure of Retirement Housing residents.

- **Tenure and Age**

It would be natural to expect that the residents with longer tenure would also be older. The assessment of the profiles of the residents loading on the Combined Extra Care Factors (considered in Section 6A.2) provided an indication that this might be the case, with the profiles of residents loading on Combined Extra Care Perspective 1 (Engaged, Independent and In Control) tending to be both younger and have shorter tenure (60% with tenure of less than two years) and those loading on Combined Extra Care Perspective 2 (Care, Companionship and Peace of Mind) were both older and had longer tenure (70% having tenure of over two years). However, an analysis of the profile of all Extra Care resident participants shows that shorter tenure does not necessarily imply a lower average older age and longer tenure a higher average age. The Extra Care participants with shorter (under 2 years) tenure having an average age of 78.3 years compared with an average age of 76.9 years for the tenure of 2 years or over participants. This is an indication of the difficulty and danger of making age based assumptions regarding frailty and circumstances.

For Retirement Housing there was the expected higher average age of resident participants with tenure of 5 years or over than for residents with under 5 years tenure. The average age of participants of Retirement Housing with 5 years and over tenure was 79.3 years, which is almost 7 years older than the average age of 72.6 years for those with less than 5 years tenure. There is thus a risk that inferences regarding any differences or alignment of perspectives due to length of tenure could, in the case of Retirement Housing, potentially have been a consequence of an age related perspective, but also could have been due to some other unrecorded characteristic or merely be a consequence of chance. This was indicated in Section 6A.5 by the preponderance of residents with shorter tenure (irrespective of age) that appeared to be aligned to Combined Retirement Housing Perspective 4 (Age and Assurance) with over 82% of residents loading on this perspective having tenure of less than 3 years.

## **8B.4 Gender and Relationship Considerations**

The gender and relationship status of resident participants in this research were indicated in Appendix 5. It was not hypothesised that there would be a relationship between the Second Order Perspectives for either Extra Care or Retirement Housing based primarily on the gender or relationship status of participants, but single centroid perspectives were nevertheless identified for the female and male participants from Extra Care and Retirement Housing to enable comparison of the female and male perspectives. Details of these arrays are provided in Appendix 23.

- **Extra Care Gender Analysis**

Of the 68 Extra Care resident participants 43 (63%) were female and 25 (37%) were male. The Extra Care single centroid perspectives for females provided an explanation for 50% of the variance in results with 40 of the 43 female Extra Care participants loading on this with at least a 0.5 significance level, while the Extra Care single centroid perspectives for males provided an explanation for 47% of variance with 24 out of 25 male participants loading on this with at least a 0.5 level of significance. These results were considered to provide a credible basis for comparison of the female and male perspectives.

The correlations between Extra Care male and female participant perspectives and the Extra Care Second Order Perspectives are shown in Table 8B.7.

**Table 8B.7: Correlations of Extra Care Second Order Perspectives 1 and 2 and Single Centroid Arrays for Male and Female Extra Care Participants.**

	EC Perspective 1	EC Perspective 2	EC Male	EC Female
EC Perspective 1	1.00	.71	.94	.89
EC Perspective 2	.71	1.00	.82	.90
EC Male	.94	.82	1.00	.96
EC Female	.89	.90	.96	1.00

As noted above, there is a distinction between Extra Care Perspectives 1 and 2 of 0.71. There is a very high correlation (0.96) between the Extra Care male and female participants which supports the view that there is not a gender based division in the attitudes and perspectives of Extra Care residents. There is, however, a higher correlation of Extra Care male participants with Extra Care Perspective 1 (Independent, Secure and Connected) (0.94) than with Extra Care Perspective 2 (Cared For, Helped and Included) (0.82), but Extra Care female participants have a broadly similar correlation with Extra Care Second Order Perspective 1 (0.89) and Perspective 2 (0.90). This suggests a slight tendency for males to be more inclined towards the Extra Care Second Order Perspective 1 (Independent, Secure and Connected) but for there to be a stronger similarity between males and females than with other factors or positions based on gender distinctions.

From a comparison of the statement scores from the factor arrays for Extra Care female and male participants, three statements were identified where the factor array position of females differed from that of males by more than one place.

**#20 Availability of a good internet connection and/or wifi**

It appears that men in Extra Care are more likely to see being connected to the internet as a priority than women.

**#21 Pull-cord or pendant to summon help in an emergency**

Women seemed to consider the availability of a pull-cord or pendant to be more of a priority than men. This might be linked to a supposed male trait of self-perceived imperviousness to problems and hence not acknowledging and planning for needing to summons help.

**#53 Hairdressing salon on-site**

Men do not appear to prioritise hair care to the same extent as women. Men may not regard the appearance of their hair as being significant to their self-esteem as women or alternatively men may be less inclined to regard the hair salon as a forum for social interaction resulting in this being scored as a lower priority for males than females.

These three statements seem to reinforce certain stereo-typical gender preferences, but they are hardly sufficient to suggest that there is a significant or fundamental difference in the attitudes or preferences of female and male residents of Extra Care.

- **Retirement Housing Gender Analysis**

Of the 157 Retirement Housing resident participants 101 (64%) were female and 56 (36%) were male. The Retirement Housing single centroid perspective for females provided an explanation for 42% of the variance in results with 93 of the 101 female Retirement Housing participants loading on this with at least a 0.5 significance level, while the Extra Care single centroid perspective for males provided an explanation for 38% of variance with 45 out of 56 male participants loading on this with at least a 0.5 level of significance. These results, although less robust than the Extra Care results and reflecting the higher degree of dissonance noted within Retirement Housing, are still considered sufficient to provide a basis for comparison of the female and male perspectives.

The correlations between Extra Care male and female participant perspectives and the Extra Care Second Order Perspectives are shown in Table 8B.8.

**Table 8B.8: Correlations of Retirement Housing Second Order Perspectives 1 and 2 and Single Centroid Arrays for Male and Female Retirement Housing Participants.**

	RH Perspective 1	RH Perspective 2	RH Male	RH Female
RH Perspective 1	1.00	.76	.93	.88
RH Perspective 2	.76	1.00	.88	.94
RH Male	.93	.88	1.00	.93
RH Female	.88	.94	.93	1.00

As noted above, there is a distinction between Retirement Housing Perspectives 1 and 2 of 0.76. There is a high correlation (0.93) between Retirement Housing male and female participants which supports the view that there is not a gender based division in the attitudes and perspectives of Retirement Housing residents. There is, however, a higher correlation of Retirement Housing male participants with Retirement Housing Second Order Perspective 1 (Secure, Connected and Orderly) (0.93) compared with Perspective 2 (0.88) and an almost equal but opposite correlation of Retirement Housing female participants with Retirement Housing Second Order Perspective 2 (Looked After, Companionship and Consistency) (0.94) rather than Perspective 1 (0.88). This alignment by males with Retirement Housing Perspective 1 and females with Retirement Housing

Perspective 2 is stronger than the general correlation between male and females suggesting that there might be gender basis to attitudes of Retirement Housing residents.

In a comparison of the statement scores from the factor arrays for Retirement Housing female and male participants, there were nine statements where the factor array position of females differed from that of males by more than one place.

**#1 A court manager to turn to if you need help and advice**

Men in Retirement Housing do not appear to prioritise the availability of a Court Manager as much as women. This might be because men may not consider that they need help or advice or possibly because they do not relate to the Court Manager who tend to be predominantly female (with 10 of the 11 Retirement Housing study sites having a female Court Manager).

**#5 No need to worry about maintenance and repairs**

Males appear to regard the absence of worry about repairs as a greater priority in Retirement Housing than is the case for females. This might be because responsibility for home maintenance is stereotypically seen as a male responsibility such that men are more likely to otherwise have been worried by this.

**#9 Use of a communal lounge and other shared facilities**

Men seem less interested in having use of a communal lounge than women in Retirement Housing. This might be because men are less concerned about being involved in social activities (#19) or give more priority to their own home (#24).

**#10 Peace of mind that comes from being looked after**

Males in Retirement Housing appear less concerned about being looked after than females. This might be due to a greater perception of being autonomous or reflect more fundamental differences in the reasons and motivations between of men and women for choosing to live in Retirement Housing.

**#21 Pull-cord or pendant to summon help in an emergency**

Women seemed to consider the availability of a pull-cord or pendant to be more of a priority than men. This might be linked to a supposed male trait of self-perceived imperviousness to problems and hence not acknowledging and planning for needing to summons help.

**#22 Sufficient car parking spaces**

There appears to be a greater male preference for car parking spaces, but more so in Retirement Housing than Extra Care. It might be assumed that more Retirement Housing residents may be car owners/drivers than Extra Care residents and although based on gender stereotypes, that men are more likely to be concerned about cars (and hence car parking) than women.

**#41 Contemporary kitchens and bathrooms**

Having an up-to-date kitchen and bathroom appears to matter less to female participants of Retirement Housing than male participants. The reverse position might have been anticipated given the stereotypical assumption that kitchens and bathrooms are female spaces, but this result might be linked to women worrying less (so less concerned about newness) or because females are more concerned about the function than the appearance of these spaces.

**#44 Information about costs and charges is correct, clear and comprehensive**

It appears males in Retirement Housing may be more concerned about having information about costs and charges than females. This could be linked to differences in degrees of trust or might be associated with adoption of gender based roles with males assuming greater responsibility than females for financial matters.

As well as seeming to reinforce certain stereo-typical gender preferences, these statements suggest that there may be some degree of difference in the attitudes or preferences of female and male residents of Retirement Housing.

## **8B.5 Demographic Assessment**

The indications from this exploration of possible relationships and associations between demographic factors of age, tenure and gender and the Second Order Perspectives for Extra Care and Retirement Housing are that in some instances they do have a degree of influence in determining the preference of residents, but there are always likely to be other individual or shared characteristics or consideration that also play a part. It seems that the most probable assessment that might be inferred is that the priorities and preferences of residents are not entirely determined by a particular demographic trait or characteristic but are the consequence of the interplay of a complex mix of myriad dynamic factors and influences.

### ***Chapter 8 Contribution***

*This chapter considers the underlying macro perspectives evident amongst the populations of Extra Care and Retirement Housing participants as identified from 'second order' studies. This indicates a division within both Extra Care and Retirement Housing between those whose primary preference is for the security of a place to live and others seeking the safety of care, support, companionship and reassurance. There are some features for which attitudes are consistently positive, negative or indifferent and others that divide and differentiate the two points of view (but it is evident that these are not entirely consistent between Extra Care and Retirement Housing).*

*An assessment is also made of whether these differences of perspective are likely to be attributable to demographic factors of the age, tenure, and gender of the participants. Although there are indications of some differences due to these factors, they are far from conclusive. This suggests that macro perspectives are not determined by single considerations, but are more likely built up from a variety and blend of multiple influences.*

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## **Chapter 9**

# **Identifying Insights in the Preferences, Positions and Priorities of Residents of Extra Care and Retirement Housing**

*This chapter considers the scope of the studies undertaken and the insights they provide into patterns of preference as well as supporting an understanding of the significance of place based provision and policy implications.*

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## **9A: Patterns and Perspectives**

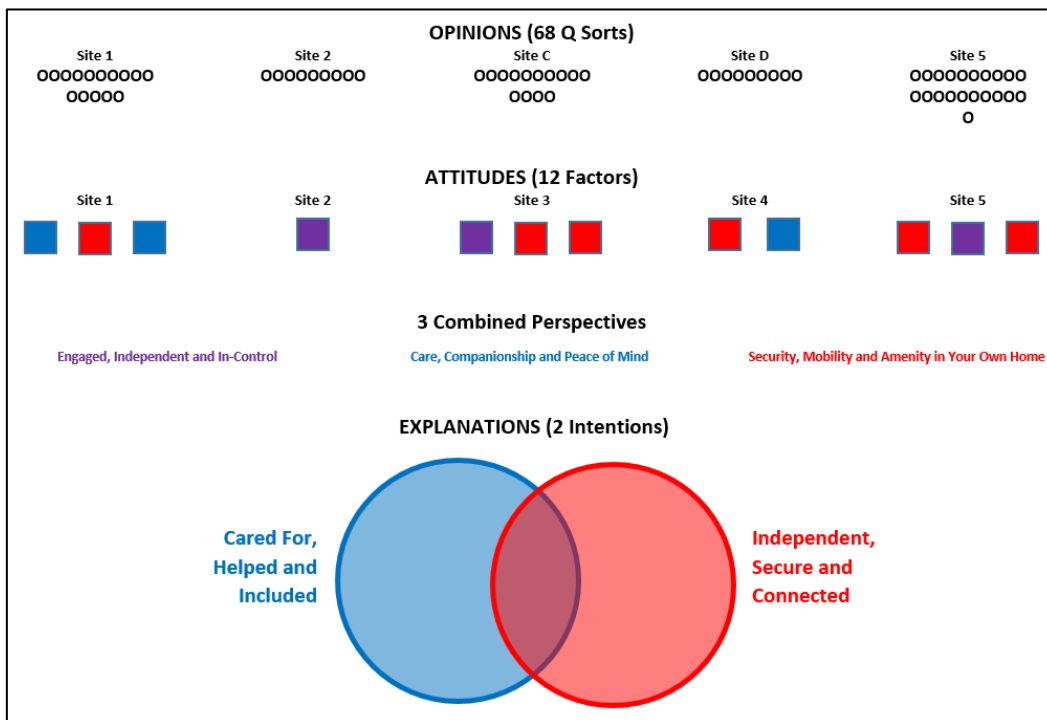
### **9A.1 Levels and Dimensions of Analysis**

This research has been extensive as well as intensive. It gathered views and accounts of personal preferences (in the form of completed Q sorts) from a substantial number of older people resident in Housing 21's Extra Care and Retirement Housing services and, by subjecting these to a number of levels of analysis, it sought to divine the nature and basis for differences as well as consistencies of views about these services that were held within the population of participants.

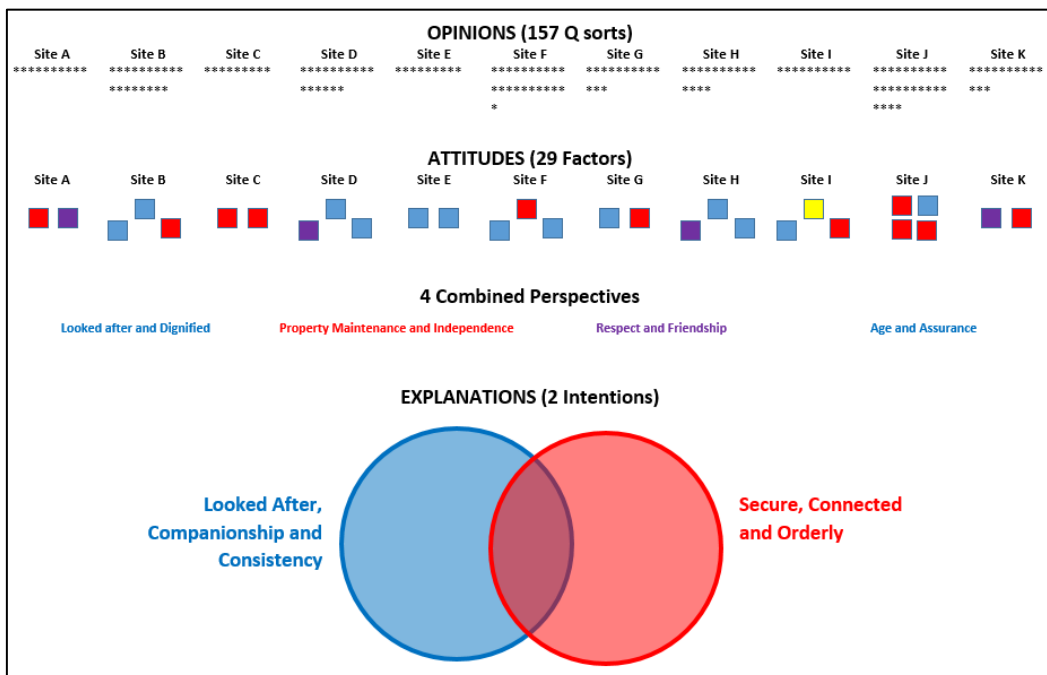
The views and opinions of individuals, that were captured through the arrangement and ordering of statements from those features and facets that were most liked to those most disliked, were analysed together with the arrays of other participants by a process of factor analysis. This identified distinct sets of attitude and opinion amongst the participants from both Extra Care and Retirement Housing, not only on a collective basis but also amongst the sub-sets of residents at each site location. These sets of perspectives were then used as inputs for a 'second order' of factor analysis which distilled the differences and connections between them in order to seek to identify the issues that produced the core distinctions of desires and intentions within these populations of Extra Care and Retirement Housing participants.

The scale, dimensions and levels of the studies undertaken are illustrated in Figures 9A.1 for Extra Care and 9A.2 for Retirement Housing. These illustrations are based on the diagram developed by Brown (1980, p69) to indicate how Q methodology helps to explicate the relationships between opinions, attitudes and explanations.

**Figure 9A.1: Levels and Dimensions of Analysis of Extra Care**



**Figure 9A.2: Levels and Dimensions of Analysis of Retirement Housing**



## **9A.2 Diversity and Similarity of Views**

Every resident of Extra Care or Retirement Housing will have their own unique personal opinions and preferences, so it is to be expected that there will be as many different arrays produced as there are participants. The extent of the diversity and degree of similarity between the views and opinions of individual residents is evident from the matrix of correlations between the different individual arrays shown in Appendix 10 for Extra Care and Appendix 13 for Retirement Housing.

Amongst the 68 Extra Care participants less than 5% of the correlations were 0.7 or above and only 14% were at 0.3 or lower. This indicates that for the vast majority (over 80%) of participants from Extra Care, whilst there was some degree of agreement amongst them about their preferences and priorities, there were also aspects or issues where they had differences of view. Amongst the 157 Retirement Housing participants less than 1% of the correlations were 0.7 or above whereas 26% were at 0.3 or lower. This indicates that there was a greater diversity of views and less agreement and consensus amongst Retirement Housing participants about their preferences and priorities than was the case for Extra Care and hence more areas where there were differences of position and opinion.

These raw results provide a reminder of the dangers, highlighted in Section 1C.3, of the tendency to homogenise and make generic assumptions regarding the interests and desires of all older people or even amongst specific cohorts of Extra Care and Retirement Housing residents.

## **9A.3 Looking for Patterns and Possibilities**

The purpose of undertaking the first level of factor analysis was not to destroy or suppress the variety of individual opinions, but to nevertheless seek out and identify positions of shared attitude and outlook. Notwithstanding the uniqueness of every participant, the principle of 'Limited Independent Variability', as advocated by Keynes (1921), provides a reasonable expectation that there will be a 'finite diversity' (Stainton Rogers, 1995) in the range of views and positions that people will adopt with regard to a given subject or situation. Q methodology was thus used to look for shared viewpoints amongst the population of participants whose arrays of preferences (i.e. Q sorts) were subject to centroid factor analysis. The aim was to look for shared perspectives and then consider and speculate about how and why they came to be constructed and constituted the way they were as a means of seeking insights into potential explanations and influences over the outlooks and preferences that were identified. The purpose of the Q study

was not to validate a position or draw a firm conclusion, but to use the patterns of preference and perspectives revealed by residents of Extra Care and Retirement Housing as the means to search for meaning as part of a process of abductive theorising.

Just as the individual arrays are different and unique, there are also variations and distinctions in the number and nature of the factors or perspectives identified at each of the five Extra Care sites (1-5) and eleven Retirement Housing sites (A-K). This is not surprising considering the differences in the number and characteristics of the participants encountered at each site, each with their own particular circumstances, characteristics and dispositions, combined with the variety in the setting, design, facilities and services provided at each site. As well as identifying perspectives for each site, perspectives were also identified within the combined populations of Extra Care and Retirement Housing participants. Although the process of aggregation involved in identifying shared perspectives amongst large numbers of participants does risk losing some of the subtleties of interest that are revealed in individual arrays and smaller studies, it can provide a stronger indication of what are likely to be common views as opposed to particular idiosyncrasies.

For Extra Care three combined perspectives were identified from 39 of the 68 participants that accounted for 56% of the variance in results. Apart from one exception, there was a generally high (above 0.5) correlation between the Extra Care site perspectives and all three of the Extra Care combined perspectives. For each of the Extra Care site perspectives, however, there was a particularly high (0.8 or above) correlation with at least one of the combined perspectives. This suggests that, whilst there is a considerable degree of overlap and commonality in the views of all Extra Care residents, the types of distinction and patterns of preference identified in the combined results are also reflected in the attitudes and preferences of the site specific factors.

For Retirement Housing four combined perspectives were identified from 95 of the 157 participants that accounted for 52% of the variance in results. In all but six cases, there was a generally high (above 0.5) correlation between each of the Retirement Housing site perspectives and all four of the combined perspectives. In more than half the cases the Retirement Housing site perspectives had a particularly high (0.8 or above) correlation with at least one of the combined perspectives and all but one of the Retirement Housing site perspectives had at least a 0.7 correlation with one of the combined perspectives<sup>36</sup>. This suggests that, whilst the

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<sup>36</sup> Site I Factor 2 (A Home without Community) was the exception with 0.55 as its highest correlation with any of the combined perspectives.

perspectives in Retirement Housing may be slightly more diverse than was the case for Extra Care, there is still a considerable degree of overlap and commonality of view across all Retirement Housing residents. The types of distinction and the patterns of attitude identified in the Retirement Housing combined results were also reflected in the configurations of preference evident in the specific site factors that were identified.

By using the combined and site perspectives for Extra Care and Retirement Housing as inputs into a second phase of factor analysis the results and patterns they suggested were viewed from a further level of abstraction and analysis. This was done in order to try and discern the causes or explanations for the underlying distinctions and determinators of why residents have the attitudes and preferences that they have. This second order analysis identified two primary perspectives for Extra Care and two for Retirement Housing but there was a considerable degree of correlation between them with a 0.75 correlation between the Extra Care second order perspectives and a 0.77 correlation between the Retirement Housing second order perspectives. It is thus evident that, even though there are differences in the underlying motivations and principles that determine why residents want to live in Extra Care or Retirement Housing accommodation, there is a considerable degree of overlap between the second order perspectives and many issues and aspects about which there is a common or consensus view. The only case where a first order factor did not load significantly on at least one of the second order perspectives was Site I Factor 2, which consistently appears as an outlier perspective that does not appear to fit with the general assessments of the purpose that other participants saw Retirement Housing as intended to address.

#### **9A.4 Distinctiveness Within (Not Between) Populations of Participants**

My assessment is that, despite the variety of individual (micro) opinions, the range of site and composite (meso) attitudes that were identified and the second order (macro) explanations of intentions, the differences between participants appear to be more about matters of emphasis than antithesis. The more pronounced level of difference observed both between the individual and the shared perspectives identified for Retirement Housing than for Extra Care participants, is indicative of Retirement Housing having a broader and more generalised service proposition and thus attracting a wider spectrum of residents, than is the case for Extra Care. This reflects the lack of clarity about the nature and present day purpose of Retirement Housing. This was identified as a concern at the outset of this thesis (in Section 1B.1) and in Chapter 2 which considered the potential shifts in public perceptions and expectations over time, the continuums of types of provision and ambiguity about what this type of accommodation should provide and

for whom, as well as academic debates and differences of opinion about the desirability of the past and potential of future provision.

It could, however, be argued that the high correlations and limited degree of divergence in the opinions, attitudes and explanations identified are simply a consequence of the limited scope of this study. Some 18% of the population of England is aged over 65 and of these only 5% live in specialist housing. 78% of the 60,000 Extra Care properties and 74% of the 455,000 Retirement Housing properties are provided on a social rent or affordable tenure basis. Although Housing 21 is responsible for some 13% of all affordable Extra Care provision it accounts for just 4% of all affordable Retirement Housing. The sites visited account for just 6% of Housing 21's Extra Care provision and 3% of its Retirement Housing units. It is thus clear that the participants in this study represent only a sub-set of a quite specific element of the total potential population and it should therefore perhaps not be too much of a surprise to find that there was a lot of commonality of attitude and relatively few major differences in view were discovered. But, notwithstanding that Extra Care and Retirement Housing represents only a relatively small portion of the total provision of accommodation for older people, it was indicated in Section 1B.5 and subsequently in Chapter 2 that Extra Care and Retirement Housing has a considerable economic and social value so is considered worthy of study and even within the limited pool of participants there are clearly issues and tensions that warrant further understanding and consideration.

The remaining sections of this Chapter will suggest what assessments might be drawn from consideration of personal preferences, place positions and the priorities of purpose, as presented in Chapters 6, 7 and 8, before going on to consider how these might be integrated and combined to make an abductive suggestion about how Extra Care and Retirement Housing might be theoretically conceptualised and better understood by adopting an integrated micro, meso and macro perspective and the implications that arise from this.

## **9B: Personal Preferences**

### **9B.1 Compromises, Constraints and Negative Connotations**

The opening line of Tolstoy's novel *Anna Karenina* (Tolstoy, 1873) suggests that whilst 'all happy families are alike; each unhappy family is unhappy in its own way.' A similar, but reverse, position was observed with a general consensus, amongst residents of Extra Care and Retirement Housing, about things that they did not like or want, but the differences that distinguished one perspective from another tended to be associated with the things that some residents valued but others did



not. The greatest consistencies of dislike relate to the compromises, constraints and negative connotations associated with living in specialised housing for older people. These concerns may be seen as the price that has to be paid to obtain the other desired benefits of Extra Care or Retirement Housing. But, if this is the case, there must be a risk that if this price comes to be perceived as too high a cost, such that it outweighs the perceived advantages, then these specialised forms of housing and support may fall out of favour and become options of last resort rather than the focus of housing choice and aspiration.

- **Anti-Social Behaviour, Gossip and Loss of Privacy**

There appeared to be an almost universal concern about anti-social behaviour in the form of the bad behaviour of some other residents (#32), gossip (#35) and loss of privacy (#34). Tables 9B.1 and 9B.2 provide a reminder of the consensus positioning of these statements in the combined analysis of the results from Extra Care and Retirement Housing.

**Table 9B.1: Preferences for #34, #35 and #32 from Combined Extra Care Study**

	F1	F2	F3
#34 People don't respect privacy or confidentiality	-6	-5	-5
#35 Gossip spreads quickly	-6	-5	-6
#32 Some other residents behave badly	-5	-6	-6

**Table 9B.2: Preferences for #34, #35 and #32 from Combined Retirement Housing Study**

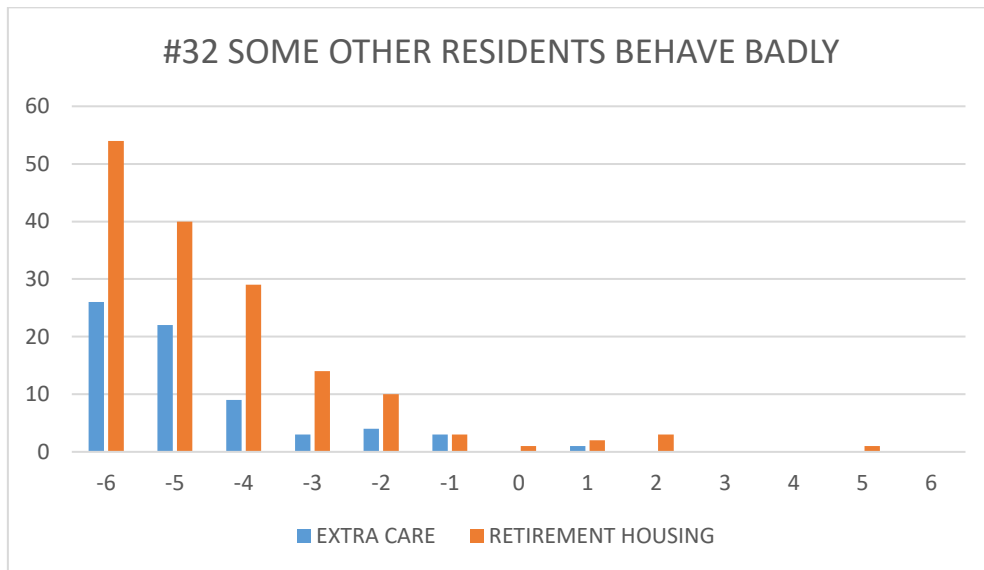
	F1	F2	F3	F4
#34 People don't respect privacy or confidentiality	-5	-5	-4	-5
#35 Gossip spreads quickly	-5	-5	-6	-6
#32 Some other residents behave badly	-6	-6	-6	-6

These statements also consistently had the lowest scores (between -6 and -4) for all the factors identified at each of the Extra Care sites. For Retirement Housing, although there was at least one factor at every site that that scored these statements as -6 or -5, there were some Retirement Housing sites that had factors that did not regard these issues as being quite so concerning. Site I Factor 2 stands out as a particular outlier in this regard scoring these issues less negatively than any of the other site factors (The scores for Site I Factor 2 were: #32 (Some other residents behave badly) 0; #34 (People don't respect privacy or confidentiality) -1; and #35 (Gossip spreads quickly) -2).

In terms of average scores these statements were also the three lowest ranked statements for Extra Care and in bottom four for Retirement Housing.

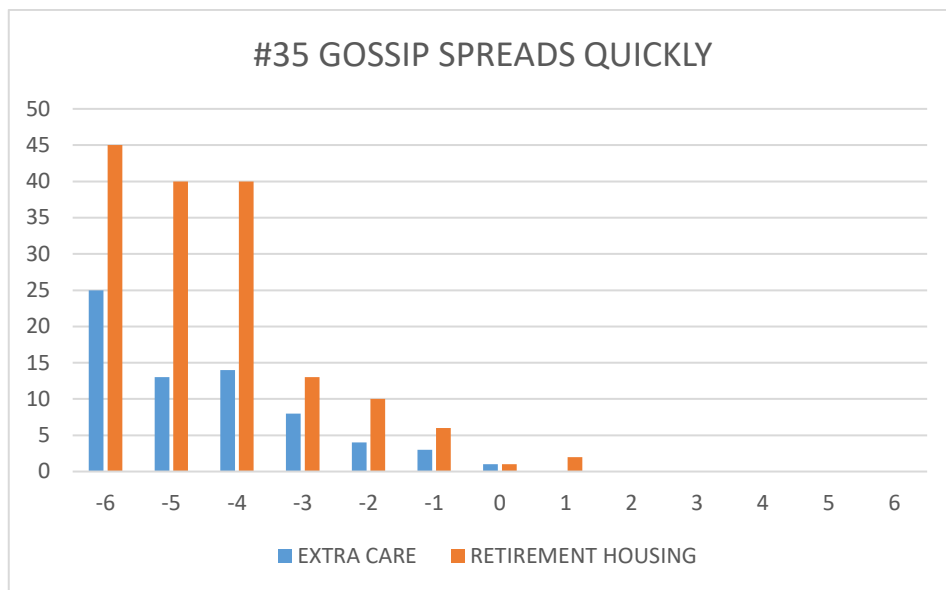
Statement #32 (Some other residents behave badly) was the lowest ranked statement for Extra Care participants and second lowest by Retirement Housing participants. For Extra Care 48 out of 68 (71%) participants scored this as either -6 or -5 and only one Extra Care participant who gave this statement a positive score of +1. For Retirement Housing 94 out of 157 (60%) participants scored this as either -6 or -5, but 6 Retirement Housing participants gave this a positive score including one participant who scored this as +5.

**Figure 9B.1: Distribution of scores for #32 (Some other residents behave badly)**



Statement #35 (Gossip spreads quickly) was the lowest ranked statement by Retirement Housing participants and second lowest for Extra Care participants. For Retirement Housing 125 out of 157 (80%) participants scored this as -4 or lower and only 3 participants appeared to not mind this and positioned this with a neutral or positive score of 0 or +1. No Extra Care participants gave this a positive score and 25 out of 68 (37%) participants scored this as -6, but for 16 out of 68 (24%) Extra Care participants this did not appear to be a major concern with a score higher than -4 such that it was only the second lowest ranked statement for Extra Care.

**Figure 9B.2: Distribution of scores for #35 (Gossip spreads quickly)**



Statement #34 (People don't respect privacy or confidentiality) could be seen as being similar to concerns about gossip (#35), but perceptions of this did not seem to be quite so negative. This might be because gossip is regarded as involving an element of malice or mischief, whereas loss of privacy might simply be an inadvertent or unavoidable consequence of the situation or setting. For Extra Care this is the third lowest ranked statement, but for Retirement Housing this is the fourth lowest. More Retirement Housing participants (36) scored this as -4 than any other score indicating that for a considerable number of participants it was not necessarily regarded as the absolutely worst thing, whereas for Extra Care participants the modal score was -6.

**Figure 9B.3: Distribution of scores for #34 (People don't respect privacy or confidentiality)**



These findings seem consistent with Percival's (2001, p836) observation that intolerance is not uncommon in age-segregated housing settings and Ewan et al (2019) who confirmed that cliques frequently form in retirement communities. Bailey (1971) has suggested that negotiating the unwritten 'rules of engagement' and maintaining privacy is likely to be especially difficult when living in close proximity with other residents, as is the case in Extra Care and Retirement Housing settings and where interactions occur on multiple levels as tenants, neighbours, co-users of communal facilities and attendees at scheme functions. Privacy can also be undermined if staff use master keys to enter residents' properties without invitation or if they divulge sensitive information to other residents (Lidz et al, 1992).

People seem to have an inherent fascination with the intimate details of other people's lives (Grotjahn, 1986, p357) and to love to gossip and speculate about them (Dunbar, 1996, p9), however, Percival (2000) suggested that in specialist housing for older people these tendencies appear to be amplified and intensified. Although only a small proportion of gossip is thought to be malicious gossip or involve making unfavourable assessments (Emler, 1994; Dunbar, 1996, p123; Dunbar et al, 1997), this appears to be particularly and consistently unwelcome.

Despite suggestions that gossip could be seen as an important element of the social world of specialist housing for older people (Gamliel and Hazan, 2006, p363), the results from this study appear to contradict the views of social anthropologists who suggest that gossip can 'help cement and maintain social bonds' (Baumeister et al, 2004, p112; Baumeister et al, 2001; Dunbar, 2004; and Bosson et al, 2006). Paine (1967) had also challenged this view, characterising gossip as a form of self-seeking behaviour, that was likely to lead to the creation of factions and divisions within a community (Foster, 2004; Wert and Salovey, 2004).

Advocates of cohousing claim that because they are 'intentional communities' they are a means to avoid these concerns and the problems that occur when people are housed together without establishing any commitment to standards of conduct or behaviour (Brenton, 2001; Brenton, 2013). But others have given warnings that cohousing communities are not always utopias (Sargisson, 2012; Fernandez et al, 2018, Boys-Smith, 2018) and Lord Richard Best suggested that the cooperative and cohousing sector had 'seeds of its own destruction' inherent within its principles (Bliss, 2009, p49) because of the lack of any superior authority with scope to resolve the disputes that would inevitably occur. It is also worth noting that very few of the perspectives identified saw the potential for residents to take control and assume responsibility for organising things (#34) as a positive feature (only Combined Extra Care Factor 1, Extra Care Site 4 Factor 1, Extra Care Site 5 Factor 3 and Retirement Housing Site E Factor 1). Most perspectives ranked this statement as a negative feature, suggesting that residents wanted someone else to take responsibility for making decisions and maintaining standards of conduct.

- **Avoidance of Care Home Stigma**

Another consistently negative feature was #26 (Being seen as a form of care home). Tables 9B.3 and 9B.4 provide a reminder of the positioning of this statement in the combined analysis of the results from Extra Care and Retirement Housing.

**Table 9B.3: Preference for #26 from Combined Extra Care Study**

	F1	F2	F3
#26 Being seen as a form of care home	-4	-3	-4

**Table 9B.4: Preference for #26 from Combined Retirement Housing Study**

	F1	F2	F3	F4
#26 Being seen as a form of care home	-4	-6	-5	-4

Although there is a consensus that #26 (Being seen as a form of care home) is a negative feature across the combined perspectives for both Extra Care and Retirement Housing, this seemed to be less of a serious concern for Extra Care participants, notwithstanding that they were more likely to be receiving or aware of the care being provided, than residents of Retirement Housing.

Amongst the Extra Care sites, whilst there appeared to be relative consistency of a negative view about being seen as a form of care home within each site, the sites with higher levels of care provision per person appeared to have a less negative view of being seen as care establishments<sup>37</sup>. This suggests that for the Extra Care sites that more closely align with care homes in terms of the level of care being provided there is a lower stigma associated with this comparison. For Retirement Housing sites, being regarded as a care home was generally seen as being a more intensely negative issue and was scored at -3 or lower by all but two of the twenty-nine Retirement Housing site perspectives. At Site J three of the four factors scored #26 as -5 or -6, but Site J Factor 3 (Peace of Mind, Repairs and Personal Space) did not regard this as being quite so negative (-2), which might have been because this perspective was primarily interested in property issues so may not have regarded or even contemplated the perception of Retirement Housing being regarded as a care facility is being a real prospect. Site I Factor 2 was also an outlier in this respect and was the only perspective to give #26 a positive score (+2) which also seemed to reflect a lack of concern about this label being applied rather a desire for care services, as this perspective was also clear that having residents with dementia or in need of care was not positive (#36: -4). This suggests that the negative perceptions of being seen as a form of care home may be attributed not only to the degree of frailty of each individual but also related

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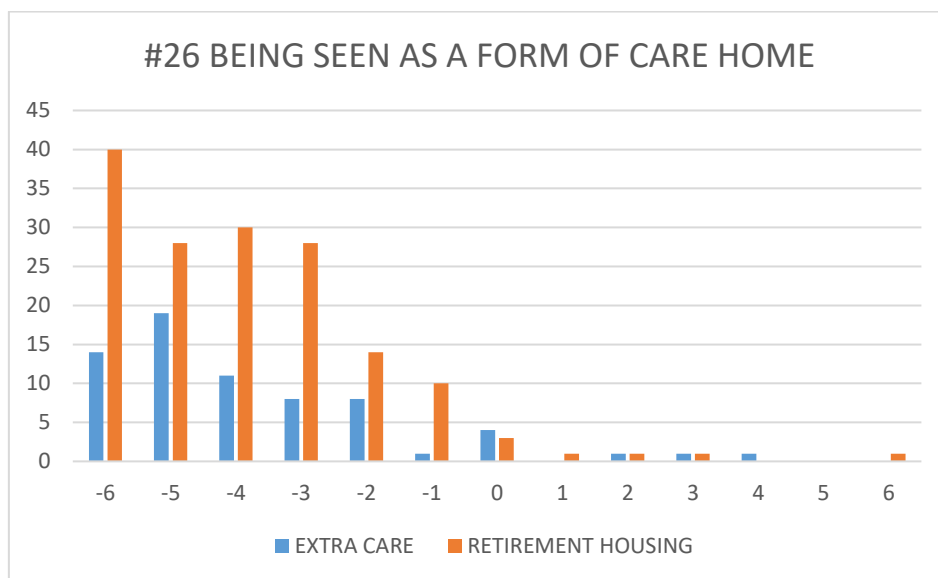
<sup>37</sup> The three perspectives identified at Extra Care Site 1, which has the highest ratio of care hours per property, scored #26 as -2 and -3, whilst #26 was scored as -5 by all three factors at Extra Care Site 5 which has the lowest care ratio.

to concerns and fears amongst residents of Extra Care and Retirement Housing about losing their autonomy rather than just the general negative perceptions of residential care provision.

Despite the dependence on care for many Extra Care residents and almost a half (32 out of 68 - 47%) of Extra Care participants scoring Statement #51 (care staff on-site 24 hours 7 days a week if needed) as +6 or +5, there is still a clear a resistance to being seen as a form of care home. The most frequent score for #36 (being seen as a form of care home) from Extra Care participants was -5 indicating that whilst not be very worst feature it is still clearly not welcomed, with only 7 (10%) Extra Care participants scoring this as 0 or as a positive.

For over a quarter (40 out of 157) of Retirement Housing participants scored #36 (being seen as a form of care home) as -6, indicating it was considered to be something that they most disliked and did not want. There is thus a greater strength of opposition to the care home label from Retirement Housing residents, who are probably not receiving care, which may reflect a fear of losing their autonomy and independence and needing to be cared for as well as a general resistance to the stigma of institutionalisation and negative connotations of dependency associated with care homes. It is possibly only the younger, fitter and more able Retirement Housing residents, for whom care is not even within their contemplation, who are not worried by this prospect.

**Figure 9B.4: Distribution of scores for #26 (Being seen as a form of care home)**



Despite attempts to improve the quality and standards of residential care provision it still subject to negative perceptions (Peace et al, 1997). Care homes are seen as places of last resort (Townsend, 1962; Means and Smith, 1984; Oldman and Quilgars, 1999; Scourfield, 2007). They are associated with dependency (Townsend, 1981) and as places where people lose their identity,

self-esteem and independence (Victor, 1994). Even though Burstow et al (2014, pp9-10) were intent on seeking to improve the reputation of care homes, they were forced to concede that they are generally seen as ‘islands of misery’ that are ‘unloved and even feared’. With such toxic reputation is it little wonder that participants were anxious to avoid a perception that where they lived was in any way comparable with a care home.

Care homes are seen as being institutions of ‘segregation and dehumanisation’ (Gamliel, 2000, p253) that fit Goffman’s (1961) definition of a ‘total institution’. The stigma that is attached to care homes is seen as being a function of their perception as institutional settings (Hrybyk et al, 2012). Even though Extra Care and Retirement Housing provide residents with independence and control of their own properties, they are not immune from similarly being characterised as institutions (Higgins, 1989; Morris, 1993; McCafferty, 1994; Dobbs et al, 2008). Howe et al (2013), also warned that the variety of terms used to refer to different specialist housing and care options for older people was not only confusing it also risked aligning the entire specialist housing and care for older people sector with care homes notwithstanding that this is the type of provision that many people had opted to move to Extra Care or Retirement Housing in order to avoid (Hirst et al, 1995).

- **Spatial Compression**

The prospect of small flats (#38) was also consistently negative across both Extra Care and Retirement Housing. Tables 9B.5 and 9B.6 provide a reminder of the positioning of this statement in the combined analysis of the results from Extra Care and Retirement Housing.

**Table 9B.5: Preference for #38 from Combined Extra Care Study**

	F1	F2	F3
#38 Small flats	-4	-6	-4

**Table 9B.6: Preference for #38 from Combined Retirement Housing Study**

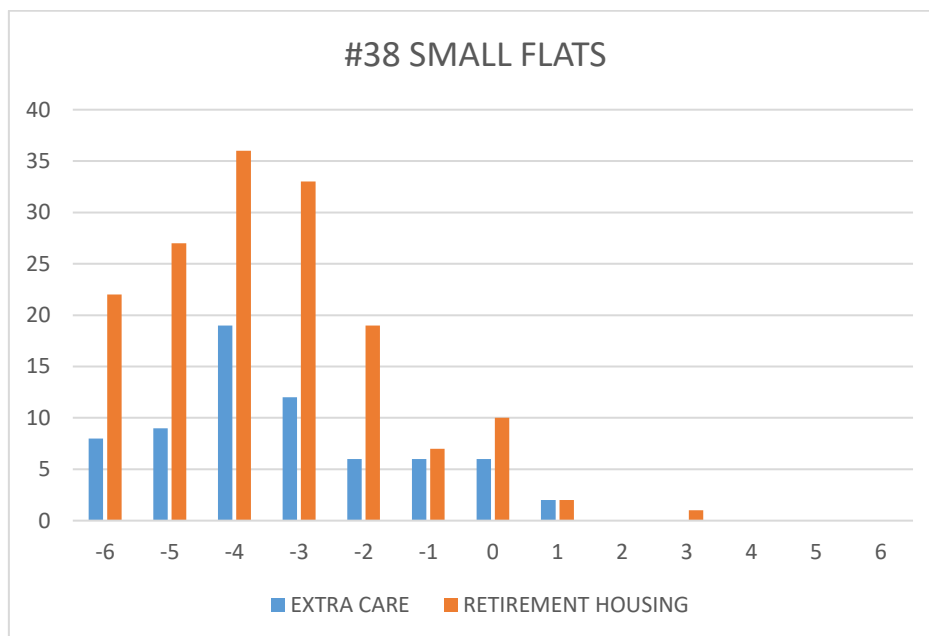
	F1	F2	F3	F4
#38 Small flats	-4	-3	-5	-5

As might have been expected, the least negative responses to this statement for Extra Care came from the site with the largest properties (i.e. Site 5 with 30 x 2 bedroom 3 person bungalows) and the most negative from the Extra Care site with the highest proportion of 1 bedroom properties (i.e. Site 1 with 79% 1 bedroom properties). Although small flats were also seen as an unwelcome prospect for Retirement Housing, there was evidence of an opposite effect with sites that produced the least negative responses being those with some of the smallest properties

including bed-sit/studio apartments<sup>38</sup>, suggesting that for those living in small properties this may not have been perceived as being quite as problematic as the contemplation of living in even smaller properties might have been for those living in, only slightly, larger properties.

Very few participants, however, saw small flats as being a positive feature of either Extra Care or Retirement Housing with #38 (small flats) being ranked 49<sup>th</sup> out of 54 statements for Extra Care and 46<sup>th</sup> out of 50 statements for Retirement Housing. The most frequent score for Statement #38 by participants from both Retirement Housing and Extra Care was -4 indicating that although a small flat is clearly not a desirable feature it may not necessarily be considered the worst thing and was thus possibly a compromise that they had been willing to make.

**Figure 9B.5: Distribution of scores for #38 (Small flats)**



Reynolds and Beamish (2003, p46) found, that although people moving to age-specific housing recognised and accepted that the properties would most likely be smaller than their previous accommodation, such that a paring back of their possessions would be required, the process of ‘downsizing’ was not necessarily welcomed. Percival’s (2002) view was that for sheltered housing to feel like home it needed to have enough space to accommodate familiar furniture and heirlooms of sentimental value as well as the option and enough space to configure the layout to their own choosing. Oldham (2014) considered that even though as people age they generally require less space, they still want sufficient space to hold onto the things they value. A consistent message therefore appears to be one of ‘less but enough’ space (Wood, 2014) and a preference

<sup>38</sup> Retirement Housing Site I has the highest proportion of studio properties (20 out of 24) yet has the least negative response to #38 (Small flats) across all three of the factors identified (F1, -2; F2 and F3, -3).



for the concept of 'rightsizing' rather than 'downsizing' (Best and Porteus, 2016; Hammond et al, 2018). If properties provide insufficient space it can impact upon basic lifestyle options such as having enough space to store possessions, entertain friends or invite a guest to join you for a meal (Roberts-Hughes, 2011, p4) which Percival (2002) had suggested were essential for a sense of self-identity.

Park (2017) noted that there had been a historical trend is towards smaller properties, even though homes in the United Kingdom are already possibly the smallest on average across Western Europe (Evans and Hartwich, 2005). There has, however, been a recognition that the ultra-small 'mico-housing' concept may not be suitable for older people (Kichanova, 2019). Offering 'under-sized' properties is less likely to be effective in encouraging older people not to under-occupy properties that are larger than they require with multiple spare bedrooms (Morgan and Cruickshank, 2014), especially as older people (over retirement age) in receipt of housing benefit are currently exempt from the so called 'bedroom tax' that would limit their eligible accommodation to one bedroom only. Pannell et al (2012) suggest that two bedrooms should be regarded as a minimum requirement for a property not to be considered too small.

- **Consequences of Compromises, Constraints and Negative Connotations**

As was noted when considering the theorising of housing decisions in Section 3B.2, it is inevitable that there will always be some degree of compromise inherent in any housing choice or in the preferences that residents have about where they live. This does not, however, mean that these negative aspects and attitudes towards Extra Care and Retirement Housing can simply be ignored. It will be important to assess whether and the extent to which these issues are considered to be a serious detriment or merely a tolerable inconvenience.

It might be that there was greater consistency in the aspects of Extra Care and Retirement Housing that participants said they disliked and did not want simply because there were relatively few statements that were inherently negative in character and many more statements that allowed for a variety of positive preference to emerge. However, the uniformity of negative response to these statements provides a clear signal that these are the things that providers should seek to address in order to improve the satisfaction and desirability of Extra Care and Retirement Housing.

As the tracking of political, economic, social, cultural and housing conditions in Section 2A.2 indicated, there are likely to have been significant shifts in the circumstances and expectations of older people from 1955 to 2015. Older people today may be less tolerant and accepting of the behaviour and involvement of others in their private affairs, more conscious of the stigma of

institutionalisation and demand more personal space than was previously the case. If not adequately addressed, these features that residents say they do not like or want could inhibit future demand for Extra Care and Retirement Housing.

Further analysis and a more holistic view of the results, however, suggests that these negative perceptions and concerns may neither be as simple or universal as might at first have been assumed. Opposition to bad behaviour (#32), loss of privacy (#34) and gossip (#35) do not appear to be directly linked or aligned to desires by residents to have their own homes with their own front doors (#24) and independent living (#28) or to be moderated where there is also a desire for the companionship of neighbours (#8) and community spirit (#23). Even though living in close proximity to others in a compact community (#37) is likely to be a consequence of small flats as well as being a significant contributor towards exposure to bad behaviour, loss of privacy and gossip, this does not seem to have been perceived quite as negatively. Similarly having residents with dementia or who need to be looked after (#36) is not regarded as negatively as being seen as a form of care home. There are thus indications that addressing these issues is likely to require an understanding not only of the particular preferences, but also the context and causes of the negative response in each setting.

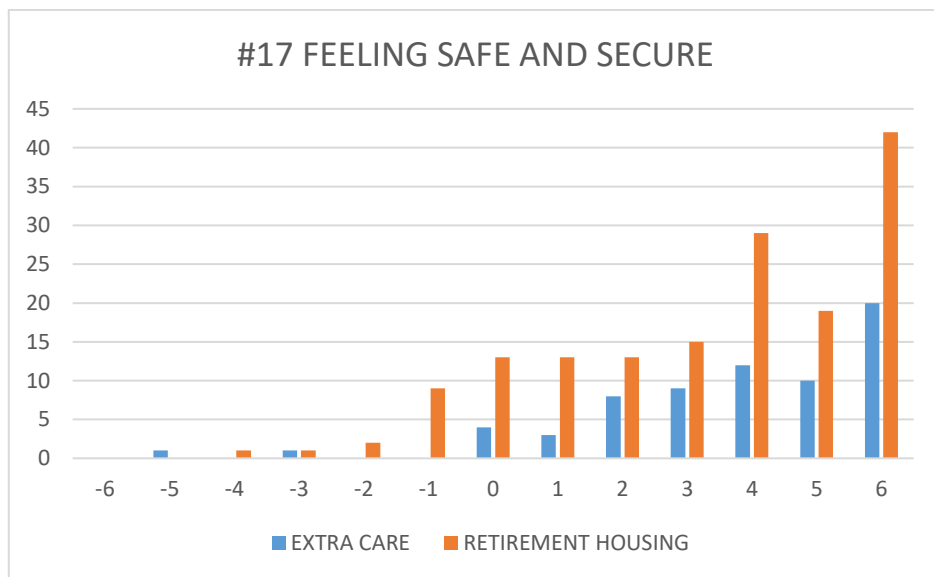
## **9B.2 Variety of Views About What is Valued**

There appeared to be less consensus and consistency about the things that residents said they valued and wanted most from Extra Care and Retirement Housing with the aspects that were most positive and wanted appearing to vary according to the particular and distinct characteristics of each perspective, with each emphasising different features and facets of what Extra Care and Retirement Housing could or should offer.

- **Safe and Secure**

On the basis of an arithmetical average (i.e. mean) the statement that was ranked highest by both the 68 Extra Care participants and by the 157 Retirement Housing participants was #17 (Feeling safe and secure). Responses to this statement were overwhelmingly positive with just 2 (3%) of Extra Care and 13 (8%) of Retirement Housing participants placing this in a position with a negative score. For 20 out of 68 (29%) of Extra Care participants and 42 out of 157 (27%) of Retirement Housing participants this is scored as +6 indicating that it was their most important consideration. For a further 22 (32%) Extra Care participants and 48 (31%) Retirement Housing participants this was scored as +5 or +4 indicating that although not the very most important consideration it was still a significant preference.

**Figure 9B.6: Distribution of scores for #17 (Feeling Safe and Secure)**



Tables 9B.7 and 9B.8 provide a reminder of the positive positioning of #17 (feeling safe and secure) in the combined analysis of the results from Extra Care and Retirement Housing.

**Table 9B.7: Preference for #17 from Combined Extra Care Study**

	F1	F2	F3
#17 Feeling safe and secure	+6	+6	+2

**Table 9B.8: Preference for #17 from Combined Retirement Housing Study**

	F1	F2	F3	F4
#38 Feeling safe and secure	+5	+6	+6	+3

Feeling safe and secure (#17) scored highly as a top preference for two out of three Extra Care combined perspectives and positively by the third and was also scored highly by three out of four Retirement Housing combined perspectives and positively by the fourth. #17 was also scored as +6 or +5 by eight out of the twelve Extra Care individual site perspectives and by fourteen of the twenty-nine Retirement Housing site perspectives. It was also scored at + 6 in the combined and for four out of five of the single centroid arrays for Extra Care and by the combined and eight out of eleven of the single centroid arrays for Retirement Housing.

There was also a positive consensus for #17 (feeling safe and secure) for both the second order perspectives identified for Extra Care (+5 for P1: Independent, Secure and Connected; +6 for P2: Cared For, Helped and Included) and for Retirement Housing (+6 for P1: Secure Connected and Orderly; +5 for P2: Looked After, Companionship and Consistency). This consistent positive scoring for #17, including both sets of second order perspectives, might, however, be a consequence of the dual components of this statement.

Within the overall positive affirmation for feeling safe and secure, it appears that there may be a cohort of participants and perspectives that are primarily motivated by the 'safety' that comes from being cared for and protected and another that are more concerned with 'security' in terms of certainty of tenure and service assurances.

The 'safety' component of #17 is implicit in #10 (Peace of mind that comes from being looked after), #21 (Pull-cord or pendant to summon help in an emergency) and #1 (A court manager to turn to if you need help and advice) and/or #51 (Care staff on-site 24 hours 7 days a week if needed) for Extra Care, which are more positively associated with the second order P2 perspectives. The 'security' aspect of #17, is addressed by #14 (Having security of tenure), #24 (You have your own home with your own front door) and #28 (Independent living), which are more positively associated with the second order P1 perspectives.

A number of studies have also previously suggested that the essence of what residents of Retirement Housing and Extra Care, are seeking is to feel 'safe and secure' (e.g. Phillips et al, 2001; King et al, 2009; Boyle, 2010 and 2011; Oldman, 2014; Barrett et al, 2016; Fox et al, 2017), but, as Lindahl et al (2018) noted, further research is still needed to better understand the features or facets of Extra Care and Retirement Housing that make residents feel safe and secure. The findings from this thesis suggest that feeling safe and secure may not be one thing but two alternative and distinct sets of preferences. As a consequence it is likely that the strength of preference for particular property features that support feelings of security or the service components that underpin perceptions of safety will not only vary from one resident to another, but may in fact be based on different conceptions of what feeling safe and secure means and how this is interpreted. This is consistent with the concept of 'ontological security', as developed by Giddens (1984; 1990; 1991), to describe and assess the subjective ability and approach that individuals adopt in order to achieve their desired sense of identity and control of their physical, social and emotional environment and circumstances. This does though raise questions about whether the priority identified for #17 (feeling safe and secure) should in fact be split into dual objectives rather than being seen as a single aim and whether the same Extra Care or Retirement Housing services can effectively address both purposes simultaneously.

- **Community Spirit, Companionship and Social Activities**

The desirability of Extra Care and Retirement Housing in terms of providing the companionship of neighbours (#8) and a sense of community spirit and friendship with others of a similar age and outlook (#23) does not seem to be directly determined by their relative preference for either safety or security. Preferences for these features are most likely driven by an individual's general

disposition, although it is possible that the character of each site and the experience of contacts with others may possibly also play a part in shaping individual experiences and responses.

There appeared to be a general, but albeit relatively slight, support for community spirit and friendship with people of a similar age and outlook (#23) across all three of the Extra Care combined perspectives and a slightly wider range, but broadly neutral view of the importance of companionship of neighbours so you are never lonely (#8). The position of preferences for #8 and #23 from the combined analysis of the results from Extra Care are shown in Table 9B.9.

**Table 9B.9: Preferences for #8 and #23 from Combined Extra Care Study**

	F1	F2	F3
#8 Companionship of neighbours so you are never lonely	+1	+2	-2
#23 Community spirit and friendship with people of a similar age and outlook	+2	+1	0

Within the Extra Care site perspectives Site 1 Factor 3 (Safety with Companionship and Control) was more positive (+4) about the companionship of neighbours so you are never lonely (#8) than any of the other Extra Care site or combined perspectives, while Site 1 Factor 1 (Looked After and Access to Amenities) was more negative (-3) about community spirit and friendship of people with a similar age and outlook (#23) than any of the other Extra Care site or combined perspectives.

There was a greater range of positive and negative views about the desirability of companionship so you are never lonely (#8) and community spirit and friendship with people of a similar age and outlook (#23) from the Retirement Housing combined perspectives. The position of preferences for #8 and #23 from the combined analysis of the results from Retirement Housing are shown in Table 9B.10.

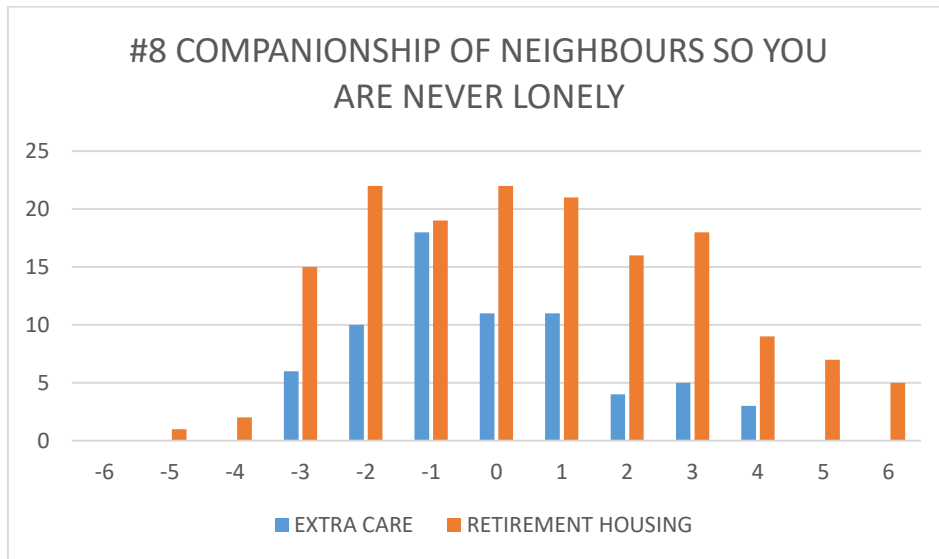
**Table 9B.10: Preferences for #8 and #23 from Combined Retirement Housing**

	F1	F2	F3	F4
#8 Companionship of neighbours so you are never lonely	+2	-2	+4	-1
#23 Community spirit and friendship with people of a similar age and outlook	0	-2	+3	0

All the Retirement Housing site perspectives for #8 (Companionship of neighbours so you are never lonely) were within the range of the parameters -2 to +4 set by the combined Retirement Housing perspectives. However for #23 (Community spirit and friendship with people of a similar age and outlook) there were sites with a more negative perspective (-4 for Site A Factor 1 and -3 for Site I Factor 2) and sites with a more positive perspective (+4 for Site H Factor 3 and Site J Factor 4) than the combined perspective. As well as appearing to have a greater range and diversity of views about the companionship of neighbours and not being lonely (#8) amongst the participants from Retirement Housing than from Extra Care, there also appeared to be a generally higher degree of preference for this from Retirement Housing participants than from the Extra

Care participants See Figure 9B.7). This not only supports the observation that there is generally less consistency in the views and preferences of Retirement Housing residents than is the case in Extra Care, but also indicates that for at least some Retirement Housing residents a sense of companionship and neighbourly contact is an important and valued feature of Retirement Housing.

**Figure 9B.7: Distribution of scores for #8 (Companionship of neighbours so you are never lonely)**



The average (i.e. mean) score for #8 from Retirement Housing participants was +0.55 indicating that this was a generally positive feature, but for Extra Care the mean score was -0.15 suggesting that neighbourliness and companionship with other residents appears to be less important and even seen as a negative feature by many Extra Care residents.

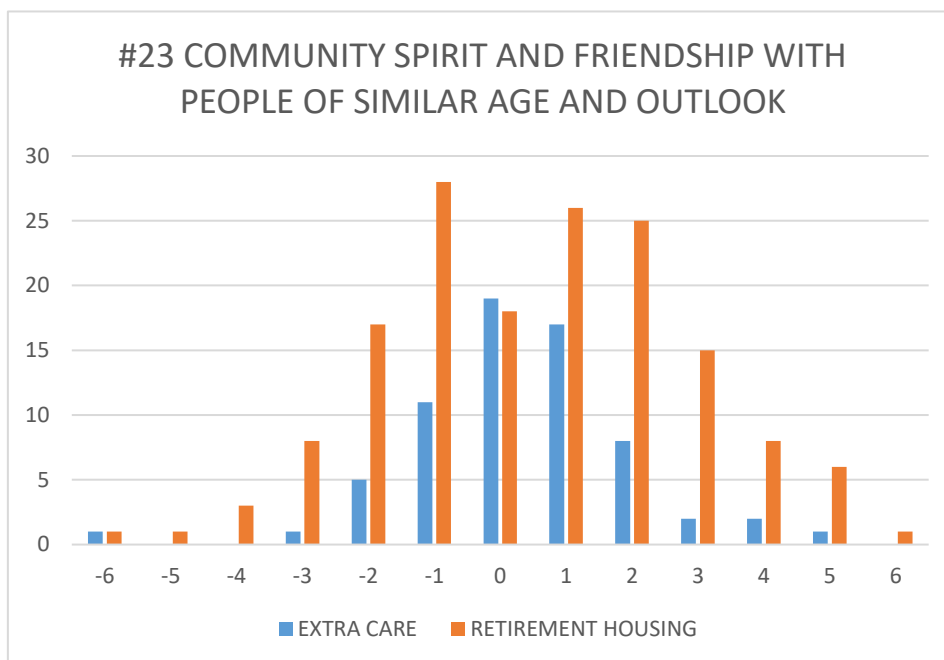
Loneliness is seen as being a particular hazard for older people (Beach and Bamford, 2014; Bolton, 2012; De Jong Gierveld et al, 2006; Victor et al, 2005; Wenger et al, 1996) and an aspect of later life that it is said many older adults fear (Sarkisian et al, 2001). However, it is important to distinguish between social isolation (which is based on an objective assessment of the number, nature and duration of the social contacts a person has) and loneliness (which is a subjective assessment by an individual of the extent of their unwelcome feelings of lack or loss of companionship) (Townsend, 1957; Perlman and Peplau, 1981, 1982; Peplau and Pearlman, 1982). Some people can live solitary lives and yet not feel lonely, while others may experience loneliness despite having extensive social networks (Coyle and Dugan, 2012; Dickens et al, 2011). Despite spending more time alone than younger adults, older people appear less susceptible to loneliness (Revenson and Johnson, 1984) and for some older people spending more time alone is a deliberate decision (Larson et al, 1982; Larson et al, 1985).

Because loneliness is subjective and different people will respond differently it is difficult to measure with any degree of consistency, and there are also mixed views about the effectiveness of Retirement Housing and Extra Care in addressing the loneliness of residents. Wood and Salter (2016) and Callaghan et al (2009) concluded that the vast majority of older people's social lives improved and their circle of friends increased after moving to Retirement Housing or Extra Care schemes. However, Bernard et al (2004) and Field et al (2002) found that for a minority loneliness increased. Although Rosenblum (2016, p40) was clear that "neighbour relations are not weak friendships", Granovetter (1983) had explored the potential benefits of simply establishing 'weak links' with acquaintances within a community so people know and are positively disposed to one another despite differences in their character and circumstances. Ferguson (2017, p18) suggested that "low level interactions ... a chat with a known member of staff ... a greeting from a neighbour ... can make a difference to the quality of life for people who might otherwise be isolated and/or lonely".

Despite residents of Extra Care potentially being more likely to have experienced poor health, low mobility and be living alone than residents in Retirement Housing, it does not seem as if combating these contributors to loneliness through companionship is as important to them as it is for residents of Retirement Housing. One possible explanation for this might be that Extra Care residents have more regular contact with care staff they do not feel quite as dependent upon other residents for companionship and their neighbours are also more likely to be frail so less able to offer assistance or companionship.

The average (i.e. mean) score for all Extra Care participants (+0.41) and the mean score of all Retirement Housing participants (+0.51) for #23 (Community spirit and friendships with people of similar age and outlook) are not too dissimilar. Whereas the distribution of Extra Care preferences resembles a normal distribution there appears to be two primary groupings of response from Retirement Housing participants with one set of 40% (63 out of 157) scoring this in the range between -2 and 0 and a second cluster of 42% (66 out of 157) scoring this between +1 and +3. This thus highlights an area of potential difference and tension in the priorities and preference amongst the residents of Retirement Housing.

**Figure 9B.8: Distribution of scores for #23 (Community spirit and friendship with people of similar age and outlook)**



Although several commentators and reports support the provision of collective social activities in Extra Care and Retirement Housing settings (e.g. Gray and Worlledge, 2018; Callaghan, 2008; Callaghan et al, 2008; Croucher et al, 2006), other studies have questioned the contribution that organised events play in the formation of strong social links and friendships (e.g. Rowe and Kahn, 1997; Ritchey et al, 2001; Litwin and Shiovitz-Ezra, 2006; 2010).

Two of the three Extra Care combined perspectives scored #19 (Social events and activities to get involved in) positively (+3) while the third was slightly negative (-1), but for Retirement Housing only one of the combined perspectives is positive (+2), one is neutral (0) and the other two are negative (-2 and -3). Tables 9B.11 and 9B.12 provide a reminder of the positioning of #19 in the combined analysis of the results from Extra Care and Retirement Housing.

**Table 9B.11: Preference for #19 from Combined Extra Care Study**

	F1	F2	F3
#19 Social events and activities to get involved in	+3	+3	-1

**Table 9B.12: Preference for #19 from Combined Retirement Housing Study**

	F1	F2	F3	F4
#19 Social events and activities to get involved in	0	-3	+2	-2

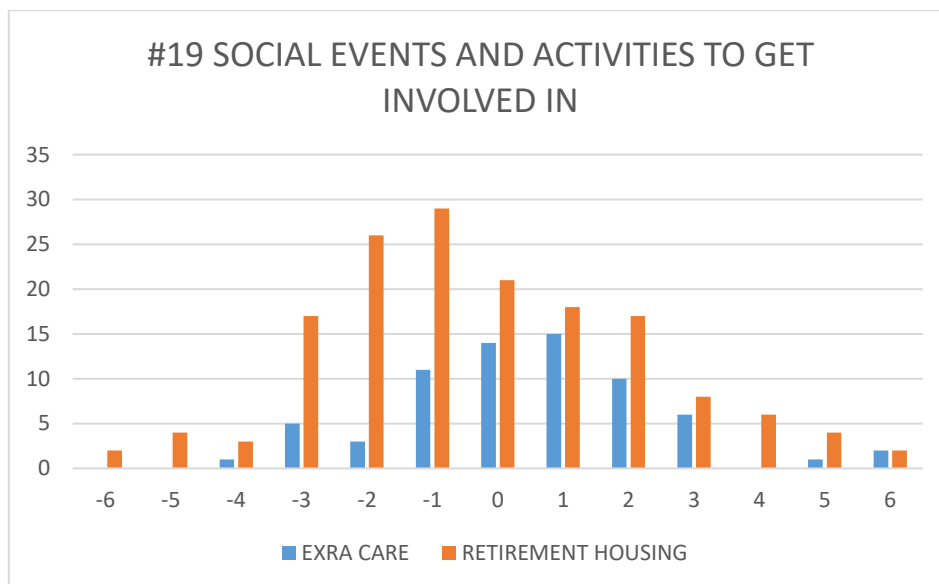
#19 (Social events and activities to get involved in) had a strong positive (+3) association for Extra Care second order perspective P2 (i.e. Cared for Helped and Included) but a neutral relationship (0) with Extra Care second order perspective P1 (i.e. Independent Secure and Connected). Both



of the Retirement Housing second order perspectives positioned #19 as a negative statements (-1 for P1: Secure, Connected and Orderly, -2 for P2: Looked After Companionship and Consistency). This seems to suggest that social events and activities might in fact be regarded as a component and contributor to care provision in Extra Care settings.

This research indicates that whilst social event and activities may be desired by some residents, more than 50% of Retirement Housing participants (81 out of 157) gave #19 a negative ranking. Although the average (i.e. mean) ranking of #19 by Extra Care residents was positive (+0.50), only 28% (19 out of 68) of Extra Care participants scored this above +1 and 29% (20 out of 68) of participants gave #19 a negative score. These results therefore question the orthodox views about the importance and value that residents attribute to the social aspects of Retirement Housing and Extra Care.

**Figure 9B.9: Distribution of scores for #19 (Social events and activities to get involved in)**



- **Age Segregation**

Despite age designation<sup>39</sup> being an essential component of the definition and nature of Extra Care and Retirement Housing, this did not appear to be a universally popular aspect of the service amongst all participants. Tables 9B.13 and 9B.14 provide a reminder of the positioning of #11 (Living around people of a similar age and outlook) and #12 (Occupancy restricted to only retired people aged over 65) in the combined analysis of the results from Extra Care and Retirement Housing.

<sup>39</sup> Normally an age threshold of 55 years is specified in order to be eligible to occupy Extra Care and Retirement Housing, although exceptions can still be made especially for people with particular care or support needs

**Table 9B.13: Preferences for #11 and #12 from Combined Extra Care Study**

	F1	F2	F3
#11 Living around people of a similar age and outlook	0	+1	-2
#12 Occupancy restricted to only retired people aged over 65	-3	-1	-4

**Table 9B.14: Preferences for #11 and #12 from Combined Retirement Housing Study**

	F1	F2	F3	F4
#11 Living around people of a similar age and outlook	-1	-2	+1	+1
#12 Occupancy restricted to only retired people aged over 65	-3	-3	-2	+5

Amongst the combined population of Extra Care participants, #11 (Living around people of a similar age and outlook) was scored as +1 (F2: Care, Companionship and Peace of Mind), 0 (F1: Engaged, Independent and In Control) and -2 (F3: Security, Mobility and Amenity in Own Home). All three of the combined Extra Care perspectives had negative scores for #12 (Occupancy restricted to only retired people aged over 65) of -1 (F2), -3 (F1) and -4 (F3). However, only 7 out of 68 (10%) Extra Care participants were aged under 65<sup>40</sup>, so it does not appear that the general negativity towards having an age criterion of 65 is entirely a consequence of the age of participants. Only one of the Extra Care site perspectives gave #12 a positive score (+4 from Extra Care Site 4 Factor 2: Safe in an Age Specific Setting with Care on Call). In the Extra Care second order analysis #12 is negative for both of the perspectives identified, but is significantly more negative (-4) for perspective P1 (Independent Secure and Connected) than (-1) for perspective P2 (Cared for Helped and Included) indicating that the more independent residents are likely to be those who are the most negative about the restrictions on the age of residents.

For the combined population of Retirement Housing participants scores of the four perspectives for #11 were +1 (F3: Respect and Friendship and F4: Age and Assurance), -1 (F1: Looked After and Dignified) and -2 (F2: Property Maintenance and Independence) which are similar to the range of scores from the Extra Care combined perspectives. For #12, although three of the four combined Retirement Housing perspectives were negative (-2 for F3 and -3 for F1 and F2) the fourth perspective was very positive (+5 for F4) about occupancy being restricted to only retired people aged over 65<sup>41</sup>. This is despite only 24 out of 157 (15%) Retirement Housing participants being aged under 65<sup>42</sup>, so it does not appear that the general negativity towards having an age criterion of 65 is entirely a consequence of the age of participants. Three of the Retirement Housing site perspectives, however, scored #12 at +6 (Site E Factor 2: Age, Security and

<sup>40</sup> For all Housing 21's Extra Care residents 12% are aged under 65 and the average age is 78 years 11 months

<sup>41</sup> One of the seventeen Retirement Housing participants representative of Retirement Housing perspective F4 was aged under 65, but her association with this view might have been due to other influences or could possibly still consistent with her age as she was living with a partner and her partner might have satisfied the age criteria.

<sup>42</sup> For all Housing 21's Retirement Housing residents 16% are aged under 65 and the average age is 76 years 1 month

Independence; Site F Factor 1: Age, Independence and Parking; and Site G Factor 1: Own Home and Age Exclusive) with a further two Retirement Housing site perspectives giving #12 a positive score of +4 (Site B Factor 2: Age Exclusivity with No Worries; and Site D Factor 2: Home and Community). In the Retirement Housing Care second order analysis #12 is positive (+1) for P1 (Secure, Connected and Orderly) but negative (-3) for P2 (Looked After, Companionship and Consistency). This is the opposite effect from the Extra Care second order analysis, indicating that for Retirement Housing age exclusivity is seen as a positive feature by residents who also most value their independence and autonomy.

It is suggested that society is becoming more separated with regard to age (Dorling et al, 2008; Kingman, 2016) and the Social Integration Commission (2014) indicated that on average people in Britain have 42% fewer interactions with people of different ages than would be expected if there was no age segregation. Most forms of division in society (e.g. by gender, sexuality, religion, race or wealth) are condemned, but there appears to be a greater willingness to accept segregation based on age as being benign or even beneficial (Winkler and Klass, 2012). However, condolence of the separation of older people into age based housing is not universally supported and Burke (2017, p5) described it as tantamount to “age apartheid”, while Kuhn (1977, p107) called age specific housing schemes “glorified playpens for older people”.

Opposition to age segregation may be ideological, based on the assumption that integration and diversity are defining characteristics of a healthy community and civilised society (Riley and Riley, 2000; Uhlenberg and Gierveld, 2004; Vanderbeck, 2007; Evans, 2009). There are also competing views about the economic consequences of age segregation with some suggesting it can provide agglomeration benefits (Wangmo et al, 2017), while others claim it removes scope for mutual support across generations and that then need to be replaced by services provided on a paid-for basis (Kingman, 2016).

It has been suggested that housing older people in ‘safe havens’ that are isolated from the rest of society could be considered to be potentially ageist (Victor, 1987, p13; Hagestad and Uhlenberg, 2005; Croucher et al 2006; Petersen and Warburton, 2012). Even though age discrimination has been shown to diminish as people age (Rupp et al, 2005), it is suggested that age segregated housing might be a source of intra-generational ageism (Kite and Wagner, 2002; Gamliel, 2000; Gamliel and Hazan, 2006; Bodner, 2009; Bodner et al, 2011). Golant (1980; 1985) suggested that people may also move to age specific housing in order to avoid unfavourable comparisons with younger fitter and more active people.

Social Identity Theory (Tajfel, 1981) suggests that residents of age-segregated housing schemes may form identities based on perceptions of age that not only separate themselves from younger age groups but also distance themselves from older people who are no longer seen as versions

of themselves due to mental or physical decline or disability (Butler, 1975, p2009; Gamliel and Hazan, 2006). This appears consistent with the responses of the Retirement Housing participants associated with combined Factor 4 (Age and Assurance) in particular. Alternatively, Terror Management Theory (Greenberg et al, 1997) suggests that being surrounded by people of similar age can act as a form of 'shock absorber' against the sense of decline associated with the ageing process (Gamliel, 2000, p252; Ritter, 1988; Thompson, 1992). This may explain the response of Extra Care participants associated with combined Factor 2 (Care, Companionship and Peace of Mind).

Keith (1977), Jerome (1981), Adams (1985) and Golant (1985) all argued that greater opportunities for social interaction was a major advantage of age segregated housing schemes. However, evidence regarding the relative social benefits of age segregated housing for older people remains inconclusive when the myriad of personal and environmental variables have been taken into account (Gans, 1972; Teaf et al, 1978; Jonas, 1979). The differences of views and positions regarding the merits of living around people of a similar age (#11) and restricting occupancy to only retired people aged over 65 (#12) identified by this study is consistent with the recognition of Means (1987) and Clough et al (2004) that age segregation may not be a priority for all older people. Age specific housing such as Extra Care and Retirement Housing only accommodates around 5% of the older population so is still far from being the norm for every older person. It must, however, be a concern that an essential feature of Extra Care and Retirement Housing is not seen as being overwhelmingly positive even by the residents who live in this type of housing.

- **Marmite Issues<sup>43</sup>**

There are some issues and aspects of what Extra Care and Retirement Housing should or should not include that appear to produce divided opinions and generate responses at both extremes of perspective, indicating that for some people these elements are of utmost importance yet for others they would prefer if these things did not feature as part of the service provided.

### **#13 Residents are able to have dogs, cats or other pets**

The positioning of #13 (Residents are able to have dogs, cats or other pets) in the perspectives identified from the analysis of the combined Extra Care and combined Retirement Housing results suggest that pet ownership is not widely supported.

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<sup>43</sup> A reference to the advertising slogan adopted for Marmite 'you either love it or hate it' which was first used in 1996 that is still being used and is so well recognised that the expression 'like marmite' is now used to refer to anything that particularly polarises opinions.

Tables 9B.15 and 9B.16 provide a reminder of the positioning of #13.

**Table 9B.15: Preference for #13 from Combined Extra Care Study**

	F1	F2	F3
#13 Residents are able to have dogs, cats or other pets	-2	-4	+1

**Table 9B.16: Preference for #13 from Combined Retirement Housing Study**

	F1	F2	F3	F4
#13 Residents are able to have dogs, cats or other pets	-4	+1	-3	-3

Within the Extra Care sites, there were only two site perspectives that saw the ability of residents to have pets as a positive issue (i.e. Site 3 Factor 2: +2 and Site 5 Factor 1: +1) and half the site perspectives scored #13 as -3 or lower. However, two Retirement Housing site perspectives scored the ability of residents to have dogs, cats or other pets (#13) as a top (+6) priority (i.e. Site B Factor 3 and Site C Factor 1) even though a substantial majority (19 out of 29) of Retirement Housing site factors rated this as a negative issue with a score of -3 or lower.

Whilst for residents who are pet owners the ability to have their pets is obviously particularly important, this did not necessarily come through sufficiently strongly in the ranking of preferences alongside other statements to influence the formation of factors at every site. There were also more residents for whom the presence of pets was definitely not welcomed, who thus influenced the overall preference for pats in many of the site and combined perspectives.

In the individual arrays #13 has the highest standard deviation between the scores for Extra Care (2.76) and second highest standard deviation between the scores for Retirement Housing (3.11). 6 out of 68 (9%) Extra Care participants and 10 out of 157 (6%) Retirement Housing participants scored the ability to have dogs, cats or other pets (#13) as a strong positive of +4 or above. However, 47 out of 68 (69%) Extra Care participants and 104 out of 157 (66%) Retirement Housing participants gave #13 a negative score.

Even though the incidence of pet ownership declines with age, it is estimated over a quarter of all people over retirement age has a pet (McNicholas, 2008), but based on these responses it is likely that the proportion of participants who were pet owners was under 10%. Housing 21 has declared that it is a 'pet friendly' organisation, but there are other providers of housing and support to older people who prohibit residents from keeping pets. In 2010 Nigel Waterson MP introduced the Care Homes and Sheltered Accommodation (Domestic Pets) Bill in an attempt to legislate to ensure that older people could keep their pets when moving to a care home or sheltered housing, but without government backing it did not become law.

It is claimed that pets can play a part in improving the health and well-being of residents (McNicholas et al, 1993; Banks and Banks, 2005) including surviving heart attacks (Friedmann et

al, 1980) and lowering blood pressure (Allen, 2003). But other studies found that, when other circumstances and factors are taken into account, pet ownership did not have any significant impact on health or blood pressure in old age (Wright et al, 2007), such that Rozin (2006) and Herzog (2011) concluded that evidence about the health impacts of pet ownership was inconclusive. It is nevertheless still claimed that pet ownership can provide emotional and companionship benefits that lead to an overall a sense of feeling needed and loved (McNicholas and Murray, 2005). Ashcroft (2017) suggests that pet owners in retirement housing rely on their pets for company more than friends, family or neighbours and that over a third of them think that having a pet also boosts their chances of meeting new people.

There is evidence that people who live alone or socially isolated are more likely to succumb to anthropomorphic tendencies of ascribing human qualities to their pets and form relationships with them (Paul et al, 2014; Letheren et al, 2016). Although it is common to give pets names, talk to them, take their photos and mourn them when they die (Serpell, 1996), there are differences in the degree to which some pet owners go in attributing human emotions and understanding too them (Fidler et al, 1996; Kiesler et al, 2006; Morris et al, 2008) and the extent to which they rely upon them for their relationships (e.g. Bonas et al, 2000; Paul, 2000; Gilbey et al, 2007; Kurdek, 2009). Taken too far anthropomorphism can become problematic (Wynne, 2004) and the loss of a pet can cause distress and depression on a par with bereavement of a human partner (McNicholas and Collis, 1995). Miltiades and Shearer (2011) also found that people who identified as being highly dependent upon their pet dog tended to be more lonely and depressed than people who were not so attached to their pets, while Gilbey et al (2007) concluded that although loneliness initially diminished when people got a pet, after 6 months they were likely to be just as lonely again as they were before.

Much of the focus of research concerning pets in specialist housing and care settings has focused on the pet owners, but the basis for the animosity that some other residents of Extra Care and Retirement Housing feel towards the residents who have pets remains less well understood and explained. The second order analysis of the Extra Care combined and site study results for #13 found that the P2 (Cared For, Helped and Included) perspective was more negative (-4) than P1 (Independent, Secure and Connected) view (-1). Similarly, the second order analysis of the results from the Retirement Housing combined and site studies found that perspective P2 (Looked After, Companionship and Consistency) was negative (-4) while position of P1 (Secure, Connected and Orderly) was positive (+1) about residents being able to have pets (#13). This suggests that positive reactions to pets are likely to found amongst those who are most independent and autonomous and that residents with these dispositions are most likely to be pet owners. Negative reactions are most likely to come from those who want to be looked after and are perhaps more dependent on care and support so as to be unable to care for a pet and hence

are perhaps more likely to be frustrated and unsympathetic towards those residents who still can and do have pets.

## **#20 Availability of a good internet connection and/or wifi**

Although, the results from the combined studies for Extra Care and Retirement Housing indicate that there is a general indifference towards the importance of the availability of a good internet connection and/or wifi (#20), there are more significant variations of opinion and perspective revealed when looking at the results from individuals and at particular sites.

For the three perspectives identified from the combined Extra Care study #20 is positioned with scores in the range 0 to -2 (F1, -1; F2, -2; F3, 0). However, within the Extra Care site perspectives, Site 1 Factor 1 gives #20 a score of +2 and both Site 3 Factor 3 and Site 4 Factor 1 position #20 at -3. For the four perspectives identified by the combined Retirement Housing study #20 is positioned with scores of -3 (F1), -2 (F4), -1 (F3) and +1 (F2). There is though more variety within the some of the site perspectives with Site K Factor 2 scoring this as +5 and Site F Factor 1 scoring this as +3 while Site I Factor 3 scores this as -5 and Site D Factor 3 as -4.

These variations are also evident in the range of individual scores for #20 with the third highest standard deviation between the scores for Extra Care (2.71) and sixth highest standard deviation between the scores for Retirement Housing (2.89).

Park et al (2016, p17) suggested that older people are likely to expect to be digitally as well as physically connected and considered that “a high-speed internet connection has already become a vital home utility” but also recognised that “those without the will, skill or opportunity to get online are at risk of further isolation and disadvantage”. Although the majority of adults in the United Kingdom do use the internet, Dutton et al (2005) and Dutton and Blank (2013) found that older people make up only a small proportion of those online. In 2016, 4.2 million (79%) of the 5.3 million adults in the UK who had never used the internet were aged 65 or over (Age UK, 2016). Age UK (2016) also reported that whilst 26% of people aged between 65 and 74 do not regularly use the internet that figure increases to 61% for those aged 75 or over.

Hannon and Bradwell (2007) showed that digital exclusion is also closely associated with social exclusion and factors such as loneliness, financial hardship and health problems are also likely to exacerbate the distancing of older people from technology. The view of Norris (2001) that the polarisation between ‘users’ and ‘non-users’ of technology is a “social digital divide” appears to be confirmed by a recent survey of residents from a range of retirement communities that found whilst overall 81% of them had access to the internet, that figure was 22% lower at 59% for those living in social rented properties (ProMatura, 2019).

Ofcom (2006) found that more than half those over 65 not using the internet had excluded themselves because they saw no reason for using it despite its potential benefits to older people in terms of social networks, contacts and access to information. It has also been shown that there is a digital dividend that can be obtained by being on-line (Roberts, 2009; Szabo et al, 2018). Vinney (1993) suggests that old people might be saying they are not interested in the internet simply because they are too proud to admit they lack the skills and need to ask for help. Xie (2003) and Wagner et al (2010) had both found that as age increased attitudes towards technology became more negative.

Results from the second order analysis of the Extra Care combined and site studies for #20 found that the P2 (Cared For, Helped and Included) perspective was quite negative (-4) whereas the P1 (Independent, Secure and Connected) view was positive (+1). Similarly, the second order analysis of the results from the Retirement Housing combined and site studies found that perspective P2 (Looked After, Companionship and Consistency) was negative (-3) while position of P1 (Secure, Connected and Orderly) was positive (+2) about availability of access to the internet and/or a wifi connection. This supports the notion of a digital divide and suggests it is linked not only to age and social status but may also be a consequence of or linked to levels of dependence and differences in the nature of the support networks that residents rely upon. This supports the view expressed by Berry (2011), who cautioned against simplistic assessments and suggested that to understand the reasons for the digital divide was likely to require an appreciation of multiple factors and circumstances.

## **#22 Sufficient car parking spaces**

Having access to sufficient car parking spaces is likely to be a primarily of concern for residents who own a car or have regular visitors who travel by car and need to park and of less interest or importance for those residents who do not drive or do not have visitors who travel by car.

#22 (Sufficient car parking spaces) is scored positively (+1) by one of the three combined Extra Care perspectives (F3: Security, Mobility and Amenity in Own Home), but negatively (-3) by the other two perspectives. Only one of the Extra Care site perspectives scored #22 as positive (Site 5 Factor 1: Freedom and Security of Home with Mobility) (+3) with all others site perspectives were in the range 0 to -3 with the exception of Site 3 Factor 2, which had a negative score of -4 for sufficient car parking spaces.

Availability of sufficient car parking spaces was scored as a positive feature (+1 or above) by less than 20% of Extra Care participants and was something that over 70% of Extra Care participants indicated they did not particularly want or value with scoring in the range -4 to -1.



Three of the four Retirement Housing combined perspectives scored #22 as a negative feature (F4, -2; F1 and F3, -1), but Factor 2 (Property Maintenance and Independence) scored having sufficient car parking spaces as a positive with a score of +2. Only two of the eleven Retirement Housing sites (Sites I and J) did not have at least one perspective that scored #22 as a positive aspect and for Site F Factor 1 having sufficient car parking spaces was positioned as a top priority (+6)<sup>44</sup>.

The issue of car parking appeared more contentious for Retirement Housing participants with the range of individual scores for #22 having the fourth highest standard deviation (2.95) and despite having an overall negative mean score (-0.03) there were 42 out of 157 (39%) of participants for whom this was positioned as a positive indicating it was something that they valued.

The proportion of people holding a driving licence declines with age (87% of those 50-59 years old have a driving licence compared to 67% for people aged over 70) (Department of Transport, 2019). Figures from the Scottish Executive (2007) also show that car ownership also declines with age, with 78% of households headed by someone aged 50-59 owning at least one car compared with 36% for households headed by someone aged 75 years or over, notwithstanding that increases in the level of car ownership were greatest amongst those aged 65 or over.

Developers of retirement properties for sale typically provide one parking space for every three properties (Burgess, 2013) and justify this on the basis that even if residents do have a car when they move in, they will subsequently decide that they no longer need it due to the location of properties with good access to public transport, shops and healthcare facilities. Park et al (2016, p16), however, suggest that older people may want the best of both worlds by demanding car parking so they can keep their car, as well as having the convenience of local amenities. Park et al (2016, p16) also suggest that the idea of 'not being able to park' is a fear commonly associated with apartment living.

Previous studies have suggested that car parking can be a contentious issue for older people at housing with care schemes (Croucher et al, 2007; Croucher and Bevan, 2010; Boyle, 2010). Pannell and Blood (2011) also suggested that if there are too few parking places this can not only result in tensions between residents but also between residents and staff such as carers, cleaners, caterers or hairdressers who work on the site and may potentially result in outsiders becoming more reluctant to visit.

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<sup>44</sup> There were not enough car parking spaces at Site F for all the residents to park their cars on the site as well spaces being used by parents of children at the neighbouring school so it is likely that a number of the participants were actively seeking to promote the importance of the car parking issue which has since been resolved with the construction of additional car parking spaces.

The second order analysis undertaken based on the combined and site perspectives identified for Extra Care and Retirement Housing suggest that sufficient car parking is not a concern for Extra Care perspective P2 (Cared For, Helped and Included) (-3) or Retirement Housing perspective P2 (Looked After Companionship and Consistency) (-2) but neutral (0) for the P1 perspectives for both Extra Care and Retirement Housing. This indicates that car parking is likely to become less of a concern as people lose their independence and become more focused on being looked after in their general disposition.

If the proportion of participants who indicated that having sufficient car parking was a positive feature that they valued is taken as an indicator of the incidence of car ownership, this would suggest that the level of car ownership in Extra Care is almost half that of Retirement Housing. The degree of contention regarding the availability of car parking may, however, not only be influenced by the level of car ownership, but also be influenced by the assessed adequacy of the car parking that was provided at each site (even though participants were asked to give their scores on a hypothetical basis rather than evaluating the level of current provision).

### 9B.3 Disability and Mobility

If part of the premise for the provision of Extra Care and Retirement Housing is that this form of accommodation can help older people achieve a better quality of life and maintain their independence for longer despite the mental and physical effects of ageing, it might be expected that the means to support residents with dementia or in need of care and the provision of features to help maintain mobility would be welcomed by residents.

#### #36 Residents with dementia or who need to be looked after

Although 25% of participants from Extra Care (17 out of 68) and Retirement Housing (39 out of 157) provided a positive score for statement #36, most participants were neutral or negative in their views about people with dementia or who need to be looked after. This is reflected in the positioning of the #36 (Residents with dementia or who need to be looked after) in the perspectives identified from the analysis of the combined Extra Care and combined Retirement Housing results. Tables 9B.17 and 9B.18 provide a reminder of the positioning of #36.

**Table 9B.17: Preference for #36 from Combined Extra Care Study**

	F1	F2	F3
#36 Residents with dementia or who need to be looked after	-2	0	-3

Within the Extra Care sites, Site 1, which had the highest levels of care, also had the most positive perspectives on residents with dementia or who needed to be looked after with two of the three site perspectives giving this a positive score (i.e. +3 for Site 1 Factor 3: Safety with Companionship and Control; and +1 for Site 1 Factor 1: Looked After and Access to Amenities). There were also perspectives that were positive about residents with dementia or who needed to be looked after at Sites 4 (Factor 1, +1) and 5 (Factor 2, +2). However, at Site 3 all the perspectives were negative about #36 (F1, -4; F2 and F3, -2) as was the single perspective at Site 2 (-3).

**Table 9B.18: Preference for #36 from Combined Retirement Housing Study**

	F1	F2	F3	F4
#36 Residents with dementia or who need to be looked after	-2	-2	-3	-1

Within the Retirement Housing sites there were perspectives that were positive about residents with dementia or who needed to be looked after (#36) at Sites B (F2, +1), E (F2, +3), F (F2, +5), H (F3, +2) and J (F3, +3). However, at Sites D and K there were not only no perspectives that were positive about residents with dementia or needing care, but Site D Factor 1 and Site K Factor 2 ranked this as -6 suggesting that they were completely opposed to residents with these characteristics living in Retirement Housing.

The incidence of dementia in Extra Care and Retirement Housing was considered in Section 5C.4 and previous studies by Housing 21 had indicated that 24% of residents in Extra Care and 11% of residents in Retirement Housing may be living with either formally diagnosed or suspected dementia. The results of these assessments of preference, however, show that there is still a resistance or reluctance to see Extra Care as well as Retirement Housing as settings where people with care needs can be accommodated and looked after. This is consistent with previous findings of intolerance and exclusionary tendencies towards resident who were more frail or dependent and who needed care (Percival, 2001, p837; McGrail et al, 2001, p155-156). Alemán (2001) saw this as part of a response by residents to assert that they were still maintaining their independence and competence whilst also exorcising their fears that someday they could also have dementia or not be able to look after themselves. Gamliel (2000, pp258-259), suggested the fundamental issue is that accommodation such as Extra Care and Retirement Housing “is accessible to several target population groups that have different goals” within which the two main sub-groups are “tenants who function independently and those who need intensive and continual support”.

The second order analysis of the combined and site perspectives for Extra Care and Retirement Housing each identified two core perspectives. For Retirement Housing both P1 (Secure, Connected and Orderly) and P2 (Looked After, Companionship and Consistency) were uniformly negative (-2) about residents with dementia or who needed to be looked after, which suggests

that although some residents may value the reassurance and support that residents can obtain in Retirement Housing, they do not see this as a suitable venue for those who need care or have more than low level dementia. For Extra Care P1 (Independent, Secure and Connected) was negative (-3) about residents with dementia or who needed to be looked after but P2 (Cared For, Helped and Included) was only neutral (0) suggesting that even in Extra Care, where there are residents who most probably do receive care and may have at least some degree of dementia, there is still a tendency to seek to distance and distinguish this from being seen as primarily a care setting.

**#45 Wide doors, that are easy to open, for people with reduced mobility**

**#46 A reliable lift**

The physical abilities of participants were not measured or assessed, but it is likely that at least some of the participants would have had mobility issues or challenges. Two particular aspects of mobility and accessibility were picked out by the Q Set of statements for consideration - #45 (Wide doors, that are easy to open, for people with reduced mobility) and #46 (A reliable lift). In addition, there were also statements that considered the level of provision of storage for buggies and other large items (#47) and the importance of an accessible bath in Extra Care schemes (#54).

Wright et al (2009, p141) had noted that a particular challenge had been the requirement to have “heavy fire doors to flats that meant some tenants had difficulty in getting in and out and so either never left their flat or left the door permanently open”. Fennell (1987) had also previously noted the difficulties of getting into and around sheltered housing buildings because of the number and weight of the doors, although only 8% of residents had specifically said this was a problem for them.

Almost all modern Extra Care developments include often multiple lifts, but the All Party Parliamentary Group on Ageing and Older People (2019) identified that a significant proportion of Retirement Housing schemes built in the 1970s and 1980s did not have lifts and as a result had poor accessibility to the upper floors. Although the ideal would be for all floors of a building to be just as accessible as the ground floor level and for lifts to be installed in all multi-floor buildings, Clapham and Munto (1990) recognised the need to balance cost and convenience and so suggested that a lift should only be required in buildings with more than a ground and a first-floor level.

The preferences for #45 (Wide doors, that are easy to open, for people with reduced mobility) and #46 (A reliable lift) by the perspectives identified from the analysis of the combined Extra Care and combined Retirement Housing results are shown in Tables 9B.19 and 9B.20.

**Table 9B.19: Preferences for #45 and #46 from Combined Extra Care Study**

	F1	F2	F3
#45 Wide doors, that are easy to open, for people with reduced mobility.	0	+1	+3
#46 A reliable lift.	0	+1	+6

**Table 9B.20: Preference for #45 and #46 from Combined Retirement Housing Study**

	F1	F2	F3	F4
#45 Wide doors, that are easy to open, for people with reduced mobility.	+1	-1	-2	0
#46 A reliable lift.	+3	0	-2	-3

These results indicate that within Extra Care there are differences only in the degree of priority that given to accessibility concerns with none of the perspectives seeing these as things they do not want, but for those who are reliant upon a lift this is seen as an absolute necessity. This is also reflected in the Extra Care site perspectives with only one site perspective suggesting wide doors that are easy to open (#45) would be a negative feature (Site 3 Factor 2: Community Spirit with Freedom and Independence; -2) and two site perspectives not seeing a reliable lift (#46) as a positive (Site 1 Factor 3: Safety with Companionship and Control; -3 and Site 5 Factor 3: Safe, Independent, Informed and Social; -1).

For Retirement Housing accessibility does not appear to be such a priority, with only one of the four combined perspectives being positive about both wide doors that are easy to open (#45) as well as a reliable lift (#46) (i.e. Factor 1: Looked After and Dignified). For the Retirement Housing sites, all the sites that have a lift (i.e. Sites A, D, E, H, I and J) have at least one perspective that is positive about having a reliable lift (#46), but of the sites without a lift only Site K had perspectives that considered a reliable lift (#46) would be a positive or neutral feature. This suggests Retirement Housing participants with mobility needs for whom accessibility would be an issue without a lift they may have already factored that in when making their choice of Retirement Housing site.

## 9B.4 Not What the Professionals Expected

In Section 6B.3 a comparison was undertaken of the collective priorities of Extra Care and Retirement Housing participants (based on a single centroid perspective) with the views of other stakeholders including local on-site staff, senior managers and external opinion shapers. This analysis identified a number of statements that were susceptible to differences in prioritisation by others in comparison with the aggregate view of residents. These included #13 (Residents are able to have dogs, cats and other pets) where the non-resident participants were less negative than residents as well as #45 (Wide doors, that are easy to open, for people with reduced

mobility) and #46 (A reliable lift) where residents in Retirement Housing were less concerned about having a lift than the other stakeholders expected and residents in Extra Care were more concerned about having doors that were wide enough and easy to open.

- **Safety Before Speed, Control or Clean and Tidy**

Although it was not a top resident priority, #42 (Checks on fire, electrical, gas, asbestos and water safety) was ranked higher by resident participants from both Extra Care (+2) and Retirement Housing (+2) than any of the other stakeholder constituencies. Whilst the physical safety of housing should never be compromised, its importance to residents is perhaps being under-appreciated and might benefit from being more proactively discussed and demonstrated. There are clear statutory duties that providers must observe with guidance on the assessment of risks (Department for Communities and Local Government, 2006), but the tragedy of the Grenfell Tower fire has raised the profile of fire safety in particular and prompted a review of what measures and protections should be expected to be adopted in specialised housing such as Retirement Housing and Extra Care (National Fire Chiefs Council, 2017). Given the almost unanimous support for #17 (feeling safe and secure) it is perhaps a mistake to regard property safety as only a regulatory compliance requirement. There was a lower priority proposed for safety checks (#42) in Extra Care than Retirement Housing by external opinion shapers (-3 for Extra Care compared with 0 for Retirement Housing) and senior managers (-2 for Extra Care and -1 for Retirement Housing). This might be based on a mis-placed assumption that because residents living in Extra Care generally have a higher degree of frailty and support they would be less concerned about the safety of the building and only concerned about their own personal care.

Other stakeholders did though appear to over-estimate the significance and preference for a number of other issues relating to the speed of repairs, desire by residents to be able to exercise choice and control and the importance of buildings and gardens being kept clean and tidy.

There are perils in living in a property that is poorly maintained so an attraction of Retirement Housing and Extra Care is that repairs are taken care of (James and Saville-Smith, 2010), but Tucker et al (2014, p227) noted that although “a considerable proportion of social housing provider’s budgets are spent on repairing and maintaining ... there is a distinct lack of research focusing on the critical success factors of a successful repairs and maintenance service”. O’Reilly and Proverbs (2008) had, however, found that the factors that most influenced the level of tenant satisfaction with repairs were communication, reliability and the quality of the materials and workmanship. Perhaps it should not therefore be a surprise that, with the exception of the external opinion shapers for Extra Care, participants in Extra Care and Retirement Housing rated the importance of the speed with which repairs were undertaken (#6) lower than the other

stakeholders. The resident scores for #6 (Repairs or problems are addressed and fixed quickly) were, however, lower for Extra Care (+1) than Retirement Housing (+3) giving credence to the view that also appears to have been taken by the other stakeholders that getting property issues fixed takes on a lower priority when set against issues related to personal care and support needs.

Despite arguments in favour of putting management control directly in the hands of residents themselves (Mullins and Stevens, 2016), but Perkins et al (2012), suggested that whilst older people have desire to maintain control over their own personal space, care and identity, they are seldom interested in taking over the entire management of the scheme they live in. This perspective was also supported by Free (1995) and by Reynolds and Beamish (2003) who found that residents were often relieved to relinquish the stress and burdens of responsibility for management and by so doing gained self-confidence and competence to maintain power over the things that mattered to them most. It appears though that local managers in particular are still over-estimating the desire of residents to be engaged and exercise choice and control (#30). Participants in Extra Care positioned #30 (Residents are engaged and able to exercise choice and control) as +1, but local and senior managers ranked this as +3. Participants in Retirement Housing scored this at 0, but local managers rated this as +2 and senior managers and external opinion shapers as +1.

Although there appears to be little research specifically on the topic of the effect of cleanliness this was one of the factors identified as important for residents living with dementia in housing with care settings in the UK (Barrett et al, 2016). However, it appears that having buildings and gardens that are kept clean and tidy (#40) is less important to participants in Extra Care (0) and Retirement Housing (+1) than is assumed to be the case by external opinion shapers for Extra Care (+2) and Retirement Housing (+3). This might be because residents' primary concern is with the services, facilities and relationships rather than the presentation of where they live.

- **Communal Laundries**

In 1970, when sheltered housing started to be developed in volume, only 65% of households had their own washing machine, and the provision of on-site laundry facilities was seen as “an invaluable amenity” (Fennell, 1987, p17). Launderettes were at their most prevalent in the mid-1980s with some 12,500 across the United Kingdom (Bloom, 1988) and in 1985 launderettes featured in the film ‘My Beautiful Launderette’ (Frears, 1985), a Levi 501 jeans advert (Bartle et al, 1985) and as a central location in the new ‘East Enders’ soap opera (BBC, 1985). The 1980s were also peak years for the development of Retirement Housing (Galvin, 2016) and Fennell (1987, p17) described the scheme laundry as a “universal feature of sheltered housing”. However, washing machine ownership is now at 97% and has probably reached saturation point (Office for National Statistics, 2018d). It is therefore understandable that opinion shapers as well

as other non-residents possibly considered the provision of a communal laundry to be something of a historical anomaly and an anachronism in the modern age so rated this as a negative aspect. Residents in Retirement Housing, however, saw #15 (A communal laundry room with washers and dryers) as a positive (+2) and in Extra Care this was a neutral (0) feature.

The comparison of preferences of residents and others for #15 (A communal laundry room with washers and dryers) for Extra Care and Retirement Housing results are shown in Tables 9B.21 and 9B.22.

**Table 9B.21: Preferences of Residents and Others for #15 in Extra Care**

	EC Residents	EC Site Staff	EC Senior Manager	EC External
#15 A communal laundry room with washers and dryers	0	-1	-1	-3

**Table 9B.22: Preferences of Residents and Others for #15 in Retirement Housing**

	RH Residents	RH Site Staff	RH Senior Manager	RH External
#15 A communal laundry room with washers and dryers	+2	0	-1	-1

There are a number of potential explanations and reasons why older people in sheltered housing might want to retain a communal laundry with washers and dryers. Middleton (1982a, p37) suggests that communal laundry facilities are needed because of the limited size of the individual properties and the small kitchen spaces that would not accommodate a washing machine and particularly not a dryer as well. This might also be an explanation why laundries are more valued by residents of Retirement Housing rather than Extra Care where the properties tend to be larger and have more kitchen space. Stephens (2018) suggests that communal laundries are preferable to in-property washing machines, not because they to free up space, but also because residents do not have to pay for the use of washing machines in a laundry and this also avoids the potential nuisance that can be caused between properties from water leaks or the noise and vibration of in-property washing machines.

The ideal of drying clothes is on a washing line with stiff breeze on a sunny day is not always an option and having a laundry with dryers avoids the need to dry clothes indoors, which is the most common cause of damp problems due to condensation (Menon and Porteous, 2011; Department for Communities and Local Government, 2016). The airing of washing to get it dry can also make a room feel cramped and so may also be particularly difficult in a bed-sit or small flat.

However, laundry is not solely concerned with hygiene and cleanliness. Douglas (1984, p2) suggests that washing and cleaning can play an important part in establishing a sense of order, while Shove (2003, p124) sees laundry as being influential in maintaining appearances. The ability to do one's own personal laundry is included as one of the Instrumental Activities of Daily Living



(IADL) used to assess levels of personal functional competence amongst older people (Lawton and Brody, 1969; Lawton, 1990; 1999). Laundry care has thus been identified as playing a key part in maintaining dignity and identity for residents in long-term care settings facilities (Bayer et al, 2005; Calnan et al, 2006; Procter & Gamble Professional, 2006; Austin et al., 2009; Armstrong, P. and Day, S., 2017).

But communal laundries are not just places for washing and drying clothes, they also serve as a social meeting point and two recent co-housing developments have both consciously opted to have communal laundries to encourage resident interaction (Brenton, 2017; Moore, 2014). Watson (2015, p881) thus suggests that a communal laundry can provide opportunities for “casual relations of sociality” without the formality associated with encounters in the communal lounge. Percival (2001) also identified this as being consistent with achieving the benefits that can come from ‘weak links’ (Granovetter, 1983) and casual encounters. Such advantages of laundries which may not be as well understood by outsiders and so perhaps provide the most plausible explanation for the differences in perception of the importance of laundries in Retirement Housing and Extra Care.

## **9C: Place Positions**

### **9C.1 A Taxonomy of Provision**

As chapter 6 and the preceding sections of this chapter have indicated, whilst each resident and participant is distinct and likely to have their own unique set of preferences they can also be grouped with others on the basis of the compatibility of their patterns of perspective. They can, however, also be categorised according to the location or site they live in and the classification of the service they are part of (i.e. either Extra Care or Retirement Housing). Just as there is a taxonomy of natural world (Linnaeus, 1737), it is possible to suggest that the views of individuals sit within a framework of provision.

A suggested order or taxonomy of provision might start with the ‘Classification’ of accommodation for older people. Within this general classification there are a number of ‘Service Species’ which the HAPPI Spectrum of Provision diagram (Figure 2B.1) (Homes and Communities Agency, 2009) identifies and describes as ‘mainstream housing’, ‘specialised housing’ and ‘care homes’. The species of specialised housing has a variety of ‘Types of Provision’ to reflect particular characteristics and designations. The two types of provision considered in this study are Extra Care and Retirement Housing, but other types include Retirement Villages and Senior

Co-Housing. The difficulty identified in Section 2B was in trying to define and distinguish between these types because of the lack of consistency of designation and description between providers. However, even within the specifics of any type, each 'Site Setting' creates a distinct manifestation of what that type can be according to its particular location, features and characteristics. Details of the site settings for each of the Extra Care sites (1-5) and Retirement Housing sites (A-K) are provided in Appendix 5. Different 'Individual Residents' will live within each site and they will have their own distinct personalities and preferences.

**Figure 9C.1: Suggested Order and Sequence of Perspectives on Housing Provision**



Despite the high levels of correlation between the individual arrays and the sets of shared perspectives that were identified within each type of provision on both a combined and on a site-specific basis, as Chapter 7 indicated, there were still differences between the patterns of preference associated with each of the site settings. Notwithstanding the commonality of the type of provision, each Extra Care and Retirement Housing site had its own distinct and unique characteristics. The analysis in Chapter 7 sought to determine whether the differences between the sites were due to the nature of the site, the natural variety and diversity of the participants or a combination of the two with the nature of the participants views having been conditioned and shaped by the experience of living at the particular site.

## 9C.2 Knowing What You Like and Liking What You Know

Perhaps the most obvious indication of participant perspectives being influenced by the service provided was in respect of the provision of a resident manager or warden who lives on site (#2). The provision of a resident manager or warden who lives on site was identified as being a top priority (+6) at three Retirement housing sites (i.e. Site E Factor 1; Site F Factor 3; Site H Factor 3). Sites E and F were the only sites that still had a resident manager who lived on site and the manager at Site H had moved from being resident to living off site in May 2015<sup>45</sup> (i.e. Site H Factor 3). The only other Retirement Housing site that had perspectives that were positive about #2 (A resident manager or warden who lives on-site) was Site B (Factor 2, +2; Factor 1, +1) and Site B had also moved from having a resident to a non-resident manager relatively recently in July 2015.

<sup>45</sup> Three years three months prior to the study being undertaken.

These perspectives and preferences for a manager who lives on-site may have been a consequence of residents at these sites having specifically identified and moved to a site that had a resident manager or may simply be a consequence of the general tendency towards people being thankful for the familiar and a case of ‘know what I like and like what I know’<sup>46</sup>. Noll and Zapf (1994) referred to this as the ‘satisfaction paradox’, where people report high levels of contentment with aspects of their living environment that may not otherwise be considered ideal and, as was noted in Section 3.B2, has been substantiated in a number of other studies (e.g. Amos et al, 1982; Fine-Davis and Davis, 1982; St. John and Clark, 1984; Amerigo and Aragones, 1990). This is explained by a desire to reduce the scope for ‘cognitive dissonance’ and discrepancies between what they have and what they say they want (Sirgy et al, 2005; Wu, 2008) and is thought to be particularly relevant where the choices available to an individual are limited or if they do not have the ability to change a situation so are therefore forced to adapt to the circumstances that they find themselves in (Delhey, 2004; Yung and Leung, 2020).

As was noted and discussed in Section 9B.3 above, a similar effect was also evident with regard to the provision of a lift in Retirement Housing with the sites without a lift generally lacking any perspectives that were positive about #46 (A reliable lift) and the sites with a lift all having at least one perspective that was positive about this statement. Chapter 7 identifies other potential connections between the circumstances, character, context and condition of each sites and the perspectives identified. Although these may be nuanced and less noticeable than the examples given for managers who live on-site (#2) and lifts (#46) there are still signs and suggestions that site specific factors do have an influence in shaping the preferences expressed.

Proshansky et al (1983) developed the concept of ‘place identity’ to consider the multiple ways in which the experiences and encounters people have with and in the spaces and places where they live in can shape their sense of self-identity, preferences and behaviours. Gregory et al. (1993) also suggested that the process of forming preferences should be seen as being more a-kin to architecture, establishing a defensible set of priorities based on a balancing of opportunities, resources and desires, than archaeology that seeks to uncover a predetermined but hidden set of values. Preferences are thus likely to be determined by a two-way process in which the attitudes and expectations of residents in a particular Extra Care or Retirement Housing scheme are shaped by their experience of and in that environment, whilst also being part of and playing a part in shaping aspects of the environment that is experienced by others. It is

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<sup>46</sup> An expression made familiar by the lyrics of the Genesis song I Know What I Like (In Your Wardrobe) (Genesis, 1974)

speculated therefore that there is likely to be an interdependency between the micro influences of personal preferences and the meso place contexts in which they are encountered.

### **9C.3 How Much Influence and How Much Choice?**

Churchill (1943) said “we shape our buildings, and afterwards our buildings shape us”, but it is difficult for residents of Extra Care or Retirement Housing properties to influence or alter place factors such as the location, setting, design or physical features of the site they live in. Place and property based assessments such as, #25 (In a nice area with attractive surroundings), #40 (Buildings and gardens that are kept clean and tidy), #7 (The appearance of the Court creates a good impression), and #41 (Contemporary kitchens and bathrooms), however, did not appear to be the issues that particularly excited or differentiated participants. No perspectives at any of the Extra Care or Retirement Housing sites scored these aspects above +4 or below -4, the distribution of the scores from the individual arrays had some of the lowest standard deviations (apart from those where there was a strong negative consensus) and these were all statements where there was a consensus between the second order perspectives identified from the combined and site arrays for Extra Care and Retirement Housing, with the exception of #40 for Retirement Housing, which was positioned at +2 for P1 (Secure, Connected and Orderly) but 0 for P2 (Looked After, Companionship and Consistency). The apparent ambivalence with regard to the setting and surroundings may be because of a recognition that these are accepted as ‘givens’ that participants or simply because these place aspects of Extra Care and Retirement Housing are not the issues that excite strong opinions.

The nature and quality of the social and personal experiences that occur in each location, however, appeared to have far more significance and be more controversial. Perspectives on such issues are formed as a consequence of the mix of people, their personalities, behaviours and interactions. The extent to which there are differences of preference and the expectations between residents in any location are thus likely to impact on the nature of the relationships and interactions that occur (i.e. whether they decide to conform with or contest the preferences and opinions of others) and hence may also have consequences for the character of the site.

The mix of preferences and desires of residents at a particular site may be determined, at least in part, by the location and facilities it provides, but could also be a consequence of the extent and nature of the other alternatives that are available. It is perhaps to be expected that a wider range of preferences and potentially conflicting priorities are likely to be encountered where there has been limited opportunity for residents to have exercised choice and where their housing position was not based on a process of selection from a credible and distinct set of alternative options (Brown and King, 2005). It was noted in Section 2A.3 that there are far fewer Extra Care facilities

than Retirement Housing properties, with approximately 16 Extra Care properties per 1,000 people aged over 65 in England compared with 123 units of Retirement Housing (Elderly Accommodation Counsel, 2015). Although the levels of provision vary in quite a haphazard manner from one area to another (Audit Commission, 1998) it has also been noted that older people in rural areas tend to be less well served and have fewer opportunities to access specialist housing within their existing communities (Porteus, 2018; Wilson, 2019). This might thus be an explanation for the wider spectrum of preferences at Extra Care Site 1 than other sites, because of its rural location and lack of other alternative housing with care or support services in the locality.

## **9D: Priorities of Purpose and Policy**

### **9D.1 Uncertainty of Purpose**

The questions and challenges set out by Butler et al (1983) about the justification and intended purpose for sheltered housing still remain apposite today as does the Audit Commission's (1998) concern that the potential of specialist housing for older people was not being considered as part of a strategic vision or being used to relieve social care pressures. Whilst the data presented in Section 1B above demonstrated that the population is ageing, the number of older households is increasing and the need for affordable specialist housing is not diminishing, it is also clear from the assessment in Section 2A.3 that the patterns of provision remain inconsistent and confused. From a policy perspective there has not been a clear articulation of what Extra Care and Retirement Housing is, who it is for and why if it did not already exist someone would want to invent it.

This thesis has not sought to make assumptions or impose solutions, but has attempted to reveal and articulate the preferences, positions and priorities of residents living in Extra Care and Retirement Housing settings so that these could give insights into the purpose and significance it had for them. This was done on an individual basis across the whole populations of 68 Extra Care and 157 Retirement Housing participants as well as on a site specific basis for 5 Extra Care locations (1-5) and 11 Retirement Housing sites (A-K). But, by combining these initial presentations of shared perspectives as the inputs into a second order analysis, this was able to identify the underlying distinctions and fundamental issues involved.

Whereas the initial combined analysis for Extra Care had revealed three perspectives and the combined analysis of Retirement Housing had found four perspectives, the second order analysis for Extra Care and Retirement Housing each identified two potential policy positions. One being as a care and support setting where people looked after as part of a protected community (i.e.

Extra Care P2: Cared For, Helped and Included and Retirement Housing P2: Looked After, Companionship and Community) and the alternative as a managed and manageable housing option that offers certainty, convenience, connectivity and control (i.e. Extra Care P1: Independent, Secure and Connected and Retirement Housing P1: Secure Connected and Orderly).

Although these perspectives can be interpreted as presenting as competing visions and intentions for the purpose of Extra Care and Retirement Housing, it is important to recognise that these alternative views are in fact highly correlated (0.75 for Extra Care P1 and P2 and 0.77 for Retirement Housing P1 and P2). This level of correlation must provide cause to question whether there are in fact two distinct sets of residents' desires or merely an array of preferences with differences being matters or emphasis rather than anthesis. Feeling safe and secure (#17) does not need to be interpreted disjunctively and it is possible for residents to value both the security of having their own home and front door (#24) as well as wanting the support of a court manager (#1) and, in the case of Extra Care, care staff on site 24 hours a day 7 days a week (#51). There is a risk that by focusing only on the degrees of difference between the second order perspectives insufficient attention and regard will be given to the issues that appear to be consistently valued by all residents, albeit with a different degree priority, and the matters that are of concern to all residents will go unaddressed.

This does not, however, mean that it is helpful for the uncertainty that clearly exists about the purpose and positioning of Extra Care and Retirement Housing to continue. It has been noted at several points in this thesis (e.g. Sections 6A.7, 7A.3, 8A.3 and 9A.2) that there was generally less correlation and more diversity of preferences expressed by the Retirement Housing participants than is the case for Extra Care. It is suggested that this may be because there has been less clarity and more ambiguity in the proposition and rationale for Retirement Housing than is the case for Housing 21's Extra Care. However, the variance in the assessment of external opinion shapers from the views of residents of Housing 21's Extra Care (noted in Section 6B.3) suggests that there could be just as much confusion about the purpose and proposition of Extra Care across the whole sector and about how this concept is being interpreted and defined by different providers.

Perhaps the key question that needs to be addressed concerns the range of competing (and at times potentially conflicting) interests, priorities and preferences that a single Extra Care or Retirement Housing site can be expected to accommodate. The quote from the 15<sup>th</sup> century English monk and poet John Lydgate (Mortimer, 2005) made famous by Abraham Lincoln suggests 'you can please some of the people all of the time, you can please all of the people some of the time, but you can't please all the people all of the time'. Although this study does not necessarily provide an answer this challenge, but it does help to expose the extent of the consistency of

concerns and the divisions in priority and preference that exist even amongst a tightly defined cohort of residents of Extra Care and Retirement Housing properties. What the thesis does suggest though is that the future purpose and positioning of what Extra Care and Retirement Housing, however, cannot be determined in a vacuum. The process of seeking to provide clarity about the policy position of Extra Care and Retirement Housing will inevitably need to involve both taking account of and being influenced by the extent, nature and configuration of existing provision as well as by the preferences, expectations and circumstances of the residents who live in these settings.

## **9D.2 Today's Attitudes, Yesterday's Provision and Tomorrow's Desires**

Policies and expectations with regard to the provision, purpose and character of Extra Care and Retirement Housing are not fixed or certain but have shifted and changed over time. As has been illustrated in Section 2A, the context and nature of the society has changed substantially over the past 60 or more years since sheltered housing emerged as a concept and began to be widely developed from 1955 onwards until today and the concepts of Extra Care and Retirement Housing are certain to continue to evolve. There have been political, economic, social, cultural and technological changes as well as shifts in expectation about what form specialist housing for older people should take. The essence of what Extra Care and Retirement Housing is has adapted and evolved over time, with changes to the nature of the relationships, support, services, facilities and properties as different elements and refurbished, replaced or redefined such that the concepts now are like the 'Ship of Theseus' after having been renewed and adapted from their original form.

This study has only provided a 'snapshot view' of opinions and preferences at a moment in time. It is important therefore that any assessment avoids the tendency towards ahistoricism and the views expressed are seen as being shaped by the past as well as needing to be interpreted with an eye towards the future. Crawford and McKee (2018a; 2018b), however, suggest that although housing aspirations and preferences are shaped and reconfigured by the landscape of the time, the dispositions that people have about their housing and homes may be slow to change and may therefore persist beyond the social conditions that shaped them. Colic-Peisker and Johnson (2012, p740) identified that there was potentially a lag between changes in political, social and cultural conditions and their impacting on aspirations. In considering the future scope and form of Extra Care and Retirement Living it may thus be necessary to look beyond the aspirations of current residents in order to speculate and to consider how demands and priorities will change. It is suggested that a good starting point for such speculation about future desires and

preferences is having a better and a more detailed and deeper understanding of the opinions and priorities of current residents.

One thing is clear from this study is that preferences and perspectives about Extra Care and Retirement Housing are complex, diverse and contingent. Decisions are not made on the basis of simple binary choices between considerations of housing and care, safety or security, community or privacy, but are more nuanced, graduated and interwoven or overlaid with multiple additional considerations (Clough, 2004; Croucher, 2008). Clark and Dieleman (1996) thus regarded housing as a 'composite good' requiring choices and compromises between a number of competing features and facets. For this reason preferences cannot be determined atomistically nor can they be formed in an abstract manner and will inevitably also be grounded in what people have experienced and believe they have a reasonable prospect of achieving (Abramsson and Anderson, 2016; Bruce and Kelly, 2013; Kintrea et al, 2015).

### **9D.3 An Issue of Demand or Supply?**

Although international comparisons of housing models and types of provision are inherently problematic and do not always translate well into other settings because of differences in context, culture and even climate, it was noted in Section 1B.4 that the United Kingdom has far lower proportion of specialist housing schemes for older people than other countries including the United States of America, Australia and New Zealand (Sutherland and Tarbatt, 2016; Local Government Association, 2017; and Airey, 2018). This has prompted claims that there is currently an under provision in the supply of Extra Care and Retirement Housing by some 15,000 to 25,000 properties per annum (Communities and Local Government Committee, 2018). Wittenberg et al (2006) had also predicted a substantial increase in demand, due to the growing older population, for more specialist supported housing. But, if this the case, questions need to be asked why more Extra Care and Retirement Housing is not in fact being built to meet this apparent shortfall in demand. Why, if 27% of older people would consider living in retirement housing is suitable options were available (Wanless, 2006) and a YouGov survey that found that 33% of those aged over 55 years were interested in the idea of retirement properties (Hughes, 2012), are not more being built? If demand is strong, are calls for financial incentives, stamp duty tax exemptions and planning support to encourage the development of more retirement properties (Ball et al, 2011; APPG on Housing and Care for Older People, 2013, Wood, 2014) really necessary? The laws of economics would suggest that demand and supply should not be continually out of equilibrium yet 'advocates' of specialist housing for older people do persist in their claims that there is an 'under-supply' (e.g. Wood, 2013; Sodha, 2015).



The answer to this apparent paradox might be neither entirely a matter of demand or simply a problem of supply but a consequence of the combination and mismatching of preferences, provision and purpose. The preferences people express, and even the scope of the discourse of issues identified that set the scope of this study (as considered in Section 5B.2), are inevitably constrained by the nature of the services and housing options that they are familiar with (Abramsson and Anderson, 2016). If there are too few examples of Extra Care and Retirement Housing to provide a critical mass of familiarity or if the nature of what these services offer and include remains uncertain, because of the variety of terminology or inconsistency of service offer, then these are not likely to feature as services that older people aspire to occupy. Where the existing models and forms of provision of Extra Care and Retirement Housing incorporate service aspects that people universally say they do not like or want (as identified in Section 9B.1) or do not fit with their particular pattern of preferences then these compromises, constraints and negative connotations may also deter people from identifying with the positives of what these services can offer. Because of the potential lag in responding to changing expectations and standards, there is also a risk that the current provision of Extra Care and Retirement Housing, whilst acceptable to existing residents (who may have reconciled themselves to be happy with the service as it is), will not satisfy the priorities and preferences needed to attract new residents. This effect has already been demonstrated with some of the earlier sheltered housing developments having become difficult to let (Tinker et al, 1995).

If older people are not seeking to move proactively and positively to Extra Care and Retirement Housing but only reluctantly, because it is the least-worst option, then that cannot be considered to be the basis for genuine demand or choice. This may be a consequence of the current provision failing to meet individual preferences and expectations or by trying to serve too wide a spectrum of purposes. It has thus been suggested that there is a need for a greater diversity of provision, with more options to address the distinctive nature of the preferences of different segments of a growing and increasingly discerning population of older people (Hughes, 2012; Robinson et al, 2019; Hrast et al, 2020).

## **Chapter 9 Contribution**

*This chapter notes that the study has involved the collection and analysis of multiple manifestations of preferences, positions and priorities towards Extra Care and Retirement Housing to create a hierarchy of personal, positional and purpose assessments.*

*It demonstrates that there are some facets of Extra Care and Retirement Housing that are seen as constraining, compromising and are definitely not liked or wanted. It also recognises a distinction and divergence in preference between those for whom the priority is safety and to be looked after and those for who want the security and autonomy of their own home. It assess the extent of variability in the degree to which features such as providing for social interaction, ensuring age exclusivity, provision of support for those living with dementia or needing to be cared for and mobility features are desired or seen as things that detract from the overall proposition. There are indicators of features that seem to only be tolerated because they are an integral or unavoidable part of a composite package of features. This prompts questions about whether Extra Care and Retirement Housing providers are doing enough to avoid the issues that residents seem to find undesirable and off-putting and the extent to which a single site can expect to provide for the entire spectrum of, often incompatible, resident preferences.*

*The suggestion is made that the differences in preference and priority that occur between different settings, as well as being a consequence of the influence of personal likes and dislikes, tolerances and circumstances, may also be a manifestation of the principle that people tend to accept and learn to love what they have rather than necessarily seeking and aspiring things they desire but are not likely to obtain and that may then leave them disappointed.*

*The distinction identified by the second order factor analysis, for both Extra Care and Retirement Housing, between a priority to be cared for with a sense of community and a perspective that prioritises secure housing and facilities is seen as a signal of an underlying uncertainty of purpose. It is clear that assessments of the purpose of Extra Care and Retirement Housing and conceptions of what these services should provide and for whom are not stable and static, but are complex, contingent and continuing to evolve. There is also a recognition that there is an interdependency between the demand driven by both personal preferences and policy perspectives, with the extent and nature of the provision and supply that is available.*

## **Chapter 10**

# **Theorising Micro Preferences, Meso Positions and Macro Priorities**

*This chapter does not seek to give definitive answers, but it does use the insights and understanding gained from this research to suggest a theoretical framework that recognises the interdependency of micro, meso and macro considerations and speculate about the implications this may have for future appreciation and development of Extra Care and Retirement Housing.*

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## 10A: Abduction from Insights

### 10A.1 Insights Not Answers

The aim of this thesis was to expose, explore and explain the preferences, positions and priorities of residents living in social rented and affordable Extra Care and Retirement Housing. I wanted to establish a better understanding in order to seek out and suggest a theoretical perspective that might help prompt new ideas, approaches and opportunities to improve the housing and services being provided. My intention, however, was not to try to prove or provide a fixed or definitive answer or determination about what Extra Care or Retirement Housing should be or how it should be designed, delivered or developed.

Every problem is said to have a solution that is simple, elegant and wrong (Mencken, 1920)<sup>47</sup>. Rather than attempt to simplify and reduce the complexity and variety of the views that have been expressed to reach a position that is certain, but detached from the messiness of the realities and lived experiences of residents, I sought to find a way to capture and frame the perspectives identified in a manner that recognised the contingent and changing nature of their perspectives.

I adopted and deployed Q methodology to capture the subjective views of participants and gain insights into their patterns of preference and perspectives. But Q methodology does not provide the means to test or evaluate the strengths or veracity of the positions it identifies. Stainton Rogers and Stainton Rogers (1990) cite Austin-Locke (1990) and the film 'Rashomon' (Kurosawa, 1950) to explain the potential for Q methodology to reveal multiple versions and viewpoints. The film presents alternative versions of the same incident (the murder of a samurai and rape/assault of his wife) as told by the bandit, the wife, the samurai (through a spiritual medium) and a supposedly impartial passing woodcutter. Although there are common elements in each account, there are also contradictions that cannot be reconciled or explained away. The film does not provide a definitive answer or seek to resolve which (if any) of the versions is accurate but accepts that each version is the truth as seen from the perspective of the person who was presenting it, notwithstanding that this creates co-existence of multiple realities and competing claims for legitimacy.

Peirce's proposition was that because "our conception of the world is determined by the conceptual schemes we employ ... we can never hope to escape from these schemes to know reality in-itself" (Bernstein, 1964, p168). By not seeking to arbitrate and evaluate between

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<sup>47</sup> This paraphrases the actual quote that "there is always a well-known solution to every human problem – neat, plausible and wrong" (Mencken, 1920)

perspectives this provides scope for a more open investigation of the possible causes and influences that shape and inform the ways in which different conceptions are developed and arrived at (Heider, 1988) and a means to expose the frames of reference that Foucault (1977) described as constructing and constricting our subjective perceptions.

The perspectives that have been identified are thus not fixed or definitive statements of position or traits, but just particular versions and narrative interpretations of the perspectives each of the participants provided. Q methodology simply provides a 'snapshot' view (Watts and Stenner, 2005) of how the specific participants reacted to and prioritised the statements on the particular date and at the time when they completed the Q sorting process. If they were asked to complete the process again on the following days, weeks, months or years it is likely that participants would produce different arrays, influenced in part by any changes in their position and preferences but also by the inherent variability in their representation of their opinions. The criteria used for determining the number of factors that could or should be identified are also not fixed. I explained in Chapter 5 and detailed in Appendices 8, 9, 11 and 12 the judgements used to decide on the number of factors to identify for each of the Q studies. However, if an alternative number of factors had been identified this could also have changed the nature and detail of the perspectives that were extracted and described<sup>48</sup>.

The difficulty of trying to resolve different perspectives into a unified position was illustrated in Section 4B using the metaphor of the fable of the blind people and the elephant. The consequence of trying to reconcile different subjective opinions tends to be the generation of more heat than light, with little insight coming from seeking to deny, disprove or discredit the perceptions and opinion of others, whether they are residents of Extra Care and Retirement Housing or the views of academics and commentators that were categorised as Assessors, Advocates, Ambitious or Antagonists in Section 2C. Although Single Centroid 'best-fit' views were produced to give a common perspective that can be used as a basis for comparison of views between groups the primary interest of this thesis has been to seek to capture and conceptualise the diversity of preferences, positions and priorities of residents with regard to Extra Care and Retirement Housing.

## 10A.2 Abductive Theorising

The purpose of the study was not merely to capture and seek to understand attitudes, assumptions and judgements that underpin the preferences of residents of Extra Care and Retirement Housing. Whilst the individual insights and inferences that can be drawn from the

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<sup>48</sup> As was illustrated by showing that each set of results could also be consolidated into a single centroid perspective.

analysis that has been undertaken are undoubtedly of interest and relevance in building a better picture of what matters to residents themselves, rather than relying on the assumption that the professional know best, they do not fulfil the aim of providing a holistic theoretical perspective to conceptualise how the preferences, positions and priorities came about. To arrive at a theoretical proposition an abductive approach was adopted that used the insights from the subjective assessments captured using Q methodology as the basis for a speculation about how a theory might help explain or frame them.

The norms and conventions of thesis presentation can hide the messy, iterative and speculative nature of the abductive process undertaken. The presentation of the evidence and supporting literature in the opening chapters should not be interpreted as indicating that the outcome and conclusions were known or determined in advance. Rather than starting with an a priori hypothesis and then seeking evidence to test or substantiate it, I embarked on this exploration with an open mind and looked backwards from findings in order to seek a plausible explanation. It was only through a process of immersion and review of the nature of the preferences expressed, consideration of the differences of site provision and attitudes and the potential distinctions of purpose revealed by second order analysis and speculation about the context and nature of the principles that had produced them that I identified micro, meso and macro influences as the key dimensions of a possible explanatory framework.

## **10B: Integration of Preferences, Positions and Priorities**

### **10B.1 Beyond Binary Choices Towards Triadic Dynamics**

It has been demonstrated the preferences and perspectives about Extra Care and Retirement Housing are complex, personal and contingent. It is clear that decisions are not made only on the basis of simple choices between housing or care, safety or security, community or privacy, but are more nuanced, graduated and interwoven or overlaid with multiple additional considerations (Clough, 2004; Croucher, 2008). A theoretical perspective or framework is therefore required that looks beyond binary 'either-or' options and that provides for a more dynamic and conception of the competing aspirations, constraints and context with which preferences are formed.

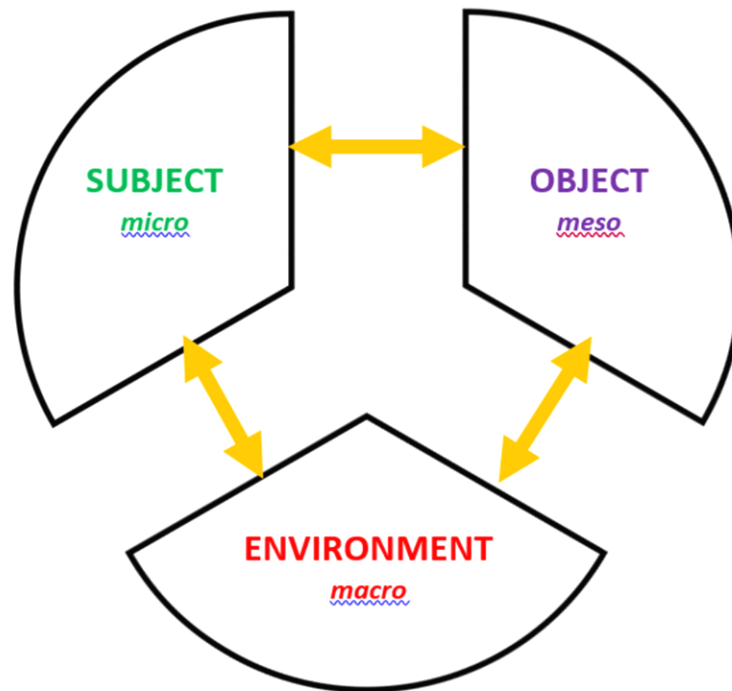
Triangles and triadic relationships have been used as theoretical metaphors across a diverse and multiple range of fields, from adolescent smoking (Flay and Petraitis, 1994; Petraitis et al, 1995) to sports volunteering (Wicker and Hallmann, 2013). Although metaphors are not definitive representations of reality and are simply tools and devices that provide a means of communicating concepts, exposing relationships and making connections, they can play an important role in constituting and forming theories (Lakoff and Johnson, 1999). A triangle is symbolic of the interdependence of three dimensions and so provides an alternative to the binary interaction between just two positions, with the shape and proportions of the triangle being determined by the dynamics of the strength and influence exerted by the forces associated with each element.

As well as being a champion of abductive study, Charles Peirce is also recognised for his work in the field of semiotics and for his 'theory of signs' (Atkin, 2013). Peirce was a particular proponent of 'triadic' theories in preference to traditional 'dyadic' studies of cause and effect, that he considered incomplete because they failed to consider the influence of the interaction with the person seeing or experiencing the phenomenon so did not assess the basis on which they were being assessed and interpreted (Peirce, 1931/1958; Bulcher, 1955). As with the process of abduction, Peirce emphasised importance of the role of the 'interpretant' in the translation of the meaning of signs and identification of more complex understandings.

Recognition of the mutuality of person, place and purpose has previously been considered by Lewin (1948) and Mead (1934). These factors are now finding new outlets and applications, even in the realm of quantum physics. Tegmark (1998; 2014, p209) proposed that the world should be regarded as consisting of three components, namely: an element related to subjective perceptions (subject); an element related to the thing of situation being studied (object); and an element related to the context or setting (environment). This interdependence between subject, object and environment also appears to correspond to connections between micro, meso and macro dimensions.



**Figure 10B.1: Relationship between Subject, Object and Environment** (Tegmark, 2014)



## 10B.2 Theorising of Micro, Meso and Macro Perspectives

The abductive assessment and theoretical inference I have drawn from my review, analysis and interpretation of the evidence collected is that the attitudes and expectations of older people living in Retirement Housing and Extra Care can only effectively be understood if considered from a holistic combination of micro, meso and macro perspectives.

To be effective assessments need to integrate, evaluate and take account of:

- the micro preferences of residents and the range and diversity of their views about which features and facets add value or detract from their experience and enjoyment;
- the meso position and proposition of how each site is configured, operated and the context in which it is located; and
- the macro priorities that determine the policy and purpose for each service and why it exists.

Hanson (2001) had characterised sheltered housing as a micro consequence of a failure of macro policy to design accessible homes and connected neighbourhoods, but of its dichotomised view this seems to be incomplete, overly simplistic and inadequate as an explanation. Specialised housing for older people is not standardised or consistent in its character or levels of provision but consists of a variety of (meso) settings each with their own particular and unique services and

specifications so it is not appropriate to describe it as if it was a unified proposition. Criticisms of the quality and desirability of provision are also as likely to be just as much a consequence of a failure to take account of (micro) preferences of older people themselves and what they want as any lack of an overall (macro) policy perspective.

I suggest that it is necessary to integrate and combine the evaluation of the micro, meso and macro perspectives to make an informed assessment of the nature and quality of the Extra Care or Retirement Housing.

**Micro:** Resident choices and preferences do not exist as abstract phenomena and only have significance or meaning in relation to services that are or could be provided and their aspirations are not unlimited but are subject to the constraints of policy and what is considered possible.

**Meso:** Provision of Extra Care and Retirement Housing is a consequence of interpretation of the needs and desires of older people and the impact of policies and decisions.

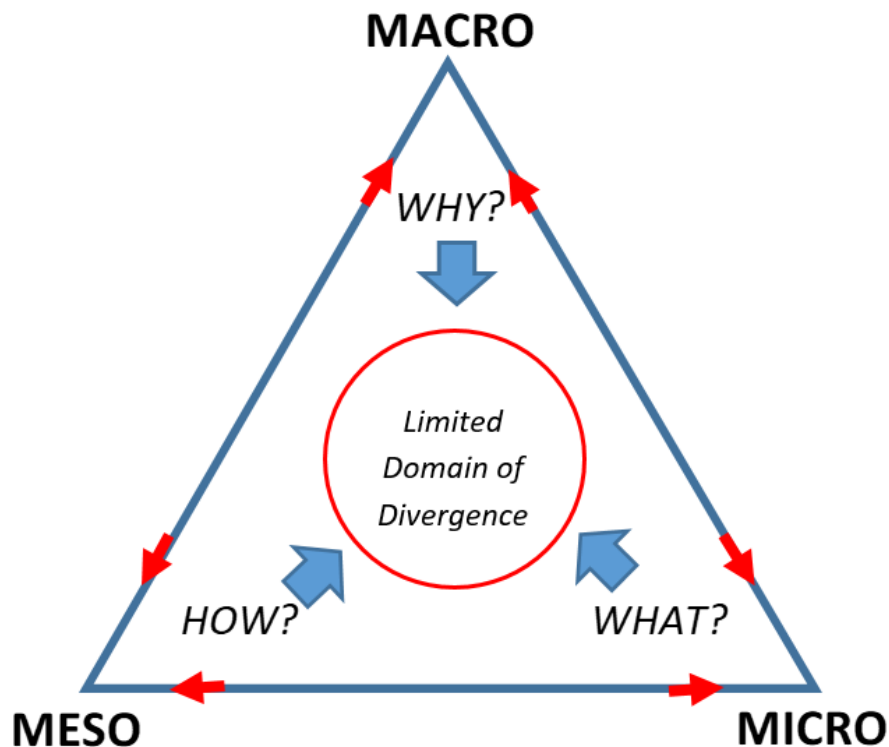
**Macro:** Policy priorities for housing and care for older people are influenced by the degree and ways in which the desires and demands from older people are recognised and assessments of the adequacy and suitability of existing supply and provision.

Preece et al, (2019) proposed that a dynamic and multidimensional understanding of housing aspirations was required as a prerequisite to the development of new insights for housing policy and practice. It was said that this needed to account for the interactions and interdependencies of 'structural and dispositional' (i.e. macro), 'individual and social' (i.e. micro), and 'temporal and spatial' (i.e. meso) factors. This is what the abductive proposition, that has arisen from my assessment and consideration of the results from the Q methodological investigations of Extra Care and Retirement Housing sites, seeks to do. I suggest that in order to effectively understand and be able to make a complete assessment of the preferences, positions and priorities that exist and the interactions older people have as residents with these forms of specialist housing, they need to be studied and explained on the basis of the interaction and combination of micro, meso and macro influences.

## 10C: Theory Implications

The theoretical proposition that it is necessary to integrate and combine the evaluation of the micro, meso and macro perspectives to make an informed assessment of the nature and quality of the Extra Care or Retirement Housing is illustrated in the diagrammatic representation in Figure 10C.1.

**Figure 10C.1: Interconnectedness and Isomorphic Effects of Macro, Meso and Micro Perspectives on Why, How and What of Retirement Housing and Extra Care**



### 10C.1 Holistic Assessments

The macro, meso, micro model proposed provides a holistic theoretical perspective that conceptualises the interrelated and interdependent nature of preferences, positions and priorities identified. No matter how appealing it is to make definitive assessments on an atomistic basis, such conclusions are likely to fall into the trap identified by Mencken (1920) of being simple, elegant and wrong. It has been demonstrated that there are no absolute answers, merely negotiated positions, that are dependent upon the diversity of subjective perspectives and individual preferences, the significance of a person's experiences and position as well as the influence of the shifting environment and policy context, that interact and collectively shape priorities.

The red arrows in Figure 10C.1 indicate that each of the micro, meso and macro perspectives impacts upon as well as being influenced by the other perspectives.

## 10C.2 Isomorphic Impact of Insufficient Provision

The theoretical model proposed may also help to explain the high degree of consensus observed between residents both within and between Extra Care and Retirement Housing sites. It is hypothesised that the effect of the interconnectedness and interplay between micro, meso and macro influences, rather than leading to greater dissonance and divergence in the character of the provision, is contributing to isomorphic pressures of standardisation, limited diversity and constrained choices in respect of Extra Care and Retirement Housing provision.

The blue arrows in Figure 9B.1 show the potentially constraining and isomorphic impact of the inter-relationships between the micro, meso and macro influences. It is suggested that the requirement to compromise in order to balance and prioritise competing preferences, the constraints of what is realistically available and the normalising pressures to conform to the conventions of social, housing and health conventions could each have the effect of limiting the range of perspectives and assessments of what Extra Care and Retirement Housing involves, how it is provided and why it is needed.

The micro idiosyncrasies of individual preferences are moderated by the particular characteristics and constraints of the type and nature of the Extra Care or Retirement Housing services on offer and available in any locality as well as the wider policy perspectives that cause people to have concerns about their ability to access affordable housing with security of tenure or support and care whilst being able to maintain their dignity and independence. If there is not enough suitable Extra Care or Retirement Housing available to enable people to pick and choose in order to find the ideal match to their particular preferences, they may be more inclined to make compromises and make the best of whatever accommodation or service they can get.

The meso position of the service offer is determined by and is a response to the past and current policy environment and interpretations of individual needs and preferences. Much of the current provision of Retirement Housing was built in the 1970s and 1980s when there were different expectations and norms regarding design and standards. The fact that some of the early provision of Retirement Housing became 'difficult to let' is not a signal that the concept was wrong, but merely market forces indicating when the interpretation of what older people want had fallen below the threshold of what they were willing to accept. Extra Care was subsequently developed as a response to the funding pressures for social care provision and conceived as an affordable alternative to residential care, but tensions and confusion have been created when this has also been presented to residents as a housing or lifestyle choice.

As well as general economic, political, social considerations, the macro policies with regard to Extra Care and Retirement Housing arise as a response to the needs, expectations and circumstances of individuals as well as a consequence of seeking to make the best of the provision that is available or can be commissioned. This can result in attempts to simultaneously achieve what can appear to be contradictory policy objectives (e.g. encouraging older people to move from larger 'family' properties to smaller specialist accommodation by emphasising its suitability as a place for independent living whilst also promoting and seeking to intensify its use as an environment for people in need care and support). In order to manage and reconcile these aims, there may ultimately need to be a change in either the understanding and expectations of older people or the nature and level of service that can be sustained.

These isomorphic pressures can be seen as the cause of some of the negativity, resentment and denigration that has been directed towards Extra Care and Retirement Housing and to be contributing to their rather confused and uncertain status. In order to reverse these effects and turn the tide it suggested that more provision is needed and this also needs to be provided on a more diversified basis. If there is increased supply it will provide more options and opportunities for a greater diversity of offer and more scope for differentiation and segmentation of the services in different settings. New provision is also needed to replace services that were built and designed to meet the standards and expectations of a past generation of older people and provide facilities and features that are more likely to appeal and meet the aspirations of the current and future cohorts of older people.

If these pressures are not addressed then there is a risk that the compromises, constraints and negative connotations involved in the current proposition will reach a tipping point after which these limitations will no longer be deemed acceptable or be deemed capable of being masked by the paradox of satisfaction and gratitude for services that are far from ideal (Noll and Zapf, 1994; Delhey, 2004; Yung and Leung, 2020).

### **10C.3 A Dynamic Equilibrium**

The model proposed would allow for a triangulation effect to occur. If one dimension becomes either stronger or weaker it will have the effect of altering the shape of the triangle and its significance relative to the other factors. If the significance of any of the elements is increased then this will have an impact by enlarging the area of influence and significance, but if all or any of the elements is diminished then the scale of impact will be reduced. The model thus creates a dynamic equilibrium between micro, meso and macro influences.

As preferences, provision and priorities change over time, as they inevitably do, this can have either a positive or negative effect on the positioning and importance of Extra Care and Retirement Housing. If there is a greater understanding of older people's wants and expectations from Extra Care and Retirement Housing then it should be easier for providers to respond and for policies to be developed to support these preferences. If more Extra Care and Retirement Housing services are developed and provided then the supply constraints will be diminished allowing more scope for consumer choice and pursuit of broader policy options. If policies are clarified then providers will be able to prioritise their efforts and older people better equipped to make informed choices.

Massey (1995, p321) in the second edition of her seminal work 'Spatial Divisions of Labour' took issue with the use of a geological metaphor of laying down of rock strata (Warde, 1985, pp196-197) that had been adopted to describe the way she had proposed that spatial inequalities and societal divisions were constructed and reconstructed by cycles of economic, social and political influence. Her concern was that this suggested the process was too structured, sequential and rigid. Massey was at pains to put the record straight and emphasise the fluidity, relational and mutuality of the relationships she wanted to convey. Although in Section 9A.1, I made reference to the diagram used by Brown (1980, p69) to describe the layers and levels of Q methodological analysis I had conducted, and in 9C.1 I had suggested a hierarchical taxonomy of individual, setting, type and species, I also want to emphasise, for the avoidance of doubt, these are not intended to create an order or structure that is at odds with the dynamic, variable and non-strata like nature of the model I have proposed.

It seems evident that if the micro, meso or macro dimensions of Extra Care or Retirement Housing were only considered in isolation or sequentially they would not provide the complete or interconnected understanding that this theoretical model provides or allow for an effective appreciation of how they might be developed or adapted to respond to and reflect changing times and circumstances.

## **Chapter 10 Contribution**

*This chapter identifies that the aim of this thesis was not to attempt to provide or seek to prove a definitive answer or solution, but has instead sought to use the insights gained as the inspiration to propose a theoretical model that integrates the micro, meso and macro perspectives of preferences, positions and priorities. The triadic model developed shows how these dimensions are interdependent and create a dynamic equilibrium. It also proposes that this may explain the apparent isomorphic influences and the confused, compromised and constrained effect that may be consequence of an insufficient supply that may be curtaining the extent and scope for divergence of preferences, positions and priorities.*

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## **Chapter 11**

### **Contribution, Consequences and Critique**

*This concluding chapter considers the nature of the contribution and understanding the research provides and its potential consequences for policy, provision and practice. It assesses the suitability and effectiveness of Q methodology and its application in order to achieve the aims set at the outset and ends with a short personal reflection on what might follow on from this thesis.*

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## 11A: My Contribution

This thesis seeks to make a contribution to the combined academic fields of housing and ageing that is sometimes classed as 'environmental gerontology' that sits within the wider domain of social policy. As was noted in Section 3A.1, studies of both gerontology and housing are though inherently multi and inter disciplinary in nature. I have sought to provide not only new empirical insights, but also address concerns that had been expressed about the lack of theoretical basis for studies in these fields by seeking to propose a suitable theoretical frame that would reflect my findings. By adopting an abductive research strategy and using Q methodology, that has been applied across many different disciplines, I sought to avoid being confined to one particular research paradigm or the orthodoxy of established hypotheses and assumptions.

The contributions of this thesis can be encapsulated within the three dimensions of: 'what', 'how' and 'why'.

- **What:** What is nature of the insight and understanding of the context, components and perceptions of residents of Extra Care and Retirement Housing that this thesis provides?
- **How:** How has this thesis developed an appreciation of the potential, process and scope for application of Q methodology in the fields of housing and ageing?
- **Why:** Why a theoretical perspective is needed in order to integrate micro preferences, meso positions and macro priorities and provide a holistic perspective.

### 11A.1 Insights and Understanding (What)

The findings of this study, as presented in this thesis, provide a wealth of evidence about the priorities and preferences of some 225 residents drawn from 16 of Housing 21's Extra Care and Retirement Housing sites located across England. It has indicated that residents tend to agree more about the things they dislike than like, it has shown which issues are more contentious than others and demonstrated that there are no simple or definitive answers about what Extra Care or Retirement Housing should include, provide or be for.

I have presented three perspectives from the combined views of the 68 Extra Care participants (as well as twelve perspectives from the five Extra Care sites) and four perspectives from the 157 Retirement Housing participants (along with twenty nine perspectives from the eleven Retirement Housing sites). These identified different possibilities and patterns of preference as well as indicating the scope for apparent inconsistencies and ambiguities of view. Rather than seek to remove, resolve or reconcile the variety and differences of outlook that have been

explicated and exposed, I have sought to provide an appreciation and insight into the inherent multiplicity of the subjective assessments. These peculiarities and points of difference serve to provide the basis for investigation and speculation about what may need to change or how Extra Care and Retirement Housing could adapt and be segmented to take account of different constituencies of preference.

The analysis has recognised that there are risks inherent in considering and analysing views in respect of each aspect or component of specialised housing for older people in a purely atomistic manner that is separate and disconnected both from its other features and facets but also from the person making the assessment. The assessments provided are holistic in nature and connect the views across a whole concourse of concerns into integrated arrays which allow for insights into the inter-connected, causal and contingent nature of different views and attitudes. This has sought to address the call for research that considers the 'composites of experience' (Satsangi and Kearns, 1992, p329) of Extra Care and Retirement Housing.

This analysis has also sought to help redress the deficit in studies that provide insights directly from the perspective of residents of Extra Care and Retirement Housing. Because the subjective views and preferences of residents are captured in an array of their own creation this avoided the need for their views to first be divined and articulated by the researcher before they could be subject to analysis and interpretation. The findings have therefore been presented without any prior agenda or intent to give preference to any particular attitude or disposition.

Whilst it is important not to over claim or suggest that the perspectives identified are discoveries of fixed views or established traits, they do provide the means to give exposure and give expression to shared or differentiated views and discourses. The second order analysis of the initial perspectives provides greater contrast and distinction between two primary drivers and motivations evident in both Extra Care and Retirement Housing, but achieves this at the price of greater abstraction and loss of the detail available from the plurality of perspectives. Similarly combined 'single centroid' views can aid comparison and identification of site specific characteristics, but should be used with caution as they risk giving a misleading impression of a uniformity of view.

As times and circumstances change so inevitably will the attitudes and expectations of older people living in Extra Care and Retirement Housing properties and so will the nature and character of these properties and services provided. By considering the origins and evolution of Retirement Housing and Extra Care, I have sought to identify some of the potential influences that may have contributed to the shape, character and nature of the current provision and the attitudes, expectations and reactions to it. This thesis only provides a 'snapshot' (Watts and Stenner, 2005) of views from particular participants, in specific locations at a moment in time,

but it does help contribute to what should be an evolving and changing picture of residents views that this is likely to continue to adapt and develop.

### **11A.2 Approach and Applicability of Q Methodology (How)**

Although this is not the first research study to use Q methodology to explore perspectives in the fields of housing or gerontology, I have sought to articulate and demonstrate its applicability, suitability and potential in areas where its adoption thus far appears to have been relatively limited. By employing Q methodology across a large pool of participants as well as via a series of site based case studies, by undertaking a second order analysis of these outputs and by using single centroid assessments as a basis for comparison, my approach, although not unique, has also been methodologically distinctive.

It is recognised that Q methodology is not the only method or means by which research could have been undertaken in order to reveal concepts as a basis for comparison and abduction. There are though relatively few alternative methods that maintain the connection between the data and the person producing it, such that the distinctiveness of individual viewpoints are respected and allowing holistic assessments to be made. Repertory Grid technique (Kelly, 1955), would have been an alternative option that also involves a process of selection and comparison of items picked from a set of stimuli to reveal constructs, but this can be similarly if not more time consuming and complex to administer and was not considered to be appropriate as it can also be perceived by participants to be more intrusive and self-revealing than is the case with Q methodology.

The nature and distinctiveness of Q methodology was considered in Chapter 4 and the appropriateness of elements Q methodology and mode of its deployment in this study are assessed is considered later in this Section 11.C of this Chapter. It is hoped that this study may have helped to allay some of the uncertainties and suspicions that still surround Q methodology and enable others to have the confidence and courage to use it when it would be appropriate to do so.

### **11A.3 Theoretical Framing (Why)**

The ultimate aim of this thesis was not merely to collect and analyse data about the opinions, attitudes and beliefs of residents of Extra Care and Retirement Housing or demonstrate the methodological merits of Q Methodology, but to seek to identify theoretical and conceptual insights that would help frame understanding of these services. Despite having exposed a rich

source of empirical data, I had identified from the outset the intent to adopt an abductive perspective and to use the insights and findings from this study to propose how they might be located within a theoretical frame that provided a legacy of explanation and understanding.

Having illustrated the complexity and variability, as well as considerable consistency and consensus, of perspectives in respect of preferences, provision and policy, I have sought to propose a conceptual framework that seeks to make sense of that paradox, by illustrating the necessity of recognition of the integrated nature and combined consequences of micro, meso and macro understandings.

The model proposed avoids reductionist explanations and seeks to embrace the contingent, interconnected, subjective and intersectional nature of the perspectives that had been expressed. It does not therefore seek to impose a static ideal solution, but offers a dynamic framework that appreciates and conceptualises the trade-offs and choices that residents of Extra Care and Retirement Housing make according to their particular preferences, position and purposes for living in that setting.

The theoretical framework proposed is not positivistic and does not therefore seek to support or reinforce any particular 'gaze' or view of what successful ageing should entail whether from a medical, neo-liberal or critical perspective (as discussed in Chapter 3). The model instead seeks to expose and locate the social constructions that residents of Extra Care and Retirement Housing have created in the dynamic fields of micro, meso and macro influences.

The aim of this thesis was to propose a model for understanding the preferences, positions and priorities of older people as residents of affordable social rented Extra Care and Retirement Housing rather than test or validate an established perspective. The model suggested is considered to provide a plausible and credible conceptual explanation that fits the circumstances and evidence that has been assessed and respects the complex, dynamic and negotiated nature of understandings and assessments of Extra Care and Retirement Housing. The model could though be seen as having wider applicability beyond the specifics of the particular provision of Extra Care and Retirement Housing that were examined. This model could, and arguably should, also be used to assess the basis and the interaction and interdependency of individual preferences, levels and types of housing and service provision and the context and priorities that influence how decisions are made in a range of general as well as specialist housing settings for any category of intended residents and not just older people.

## **11B: Potential Consequences**

My intent in undertaking this research was to offer insights that would inform future policy, provision and practice with regard to specialist housing for older people. It would, however, be a contradiction of the theoretical and epistemological perspective I have espoused for my research to propose or claim to have proved the need for specific designs, services or specifications of Extra Care or Retirement Housing. Although I have not made definitive recommendations, this research is intended to have influence, an impact and consequences for the ways in which questions of policy, provision and practice will in future be addressed.

### **11B.1 Policy Consequences**

My assessment is that there is no nirvana or perfect conception of what Extra Care and Retirement Housing should be, how it should be provided or why it is needed, but the findings and theoretical model I have proposed do still have significant potential policy consequences and implications.

The findings demonstrate the need for an integrated understanding that avoids making assumptions or considering issues without awareness of their context or in an atomistic manner. This thesis makes the case for seeking clarity with regard to what residents want from Extra Care and Retirement Housing and being explicit about the intended purpose of these services and why they are being provided. It also suggests a need for less standardisation but more specificity and a greater plurality of provision.

Extra Care and Retirement Housing services will not flourish if the choices and opportunities available to older people are constrained by lack of supply, unappealing services or the need to make unacceptable compromises. There have been numerous reports and studies calling for more and better provision of housing and support options for older people. However, it is suggested that unless such calls are based on an assessment and understanding of micro preferences of potential residents, the nature and availability of existing and planned meso provision and sense of the macro priorities and purposes that are intended to be addressed they risk being dismissed or contradicted for making partial assessments and being based on incomplete understandings.

The implication of the negative forces applying to the theoretical framework identified in Section 10C.2, is that, unless action is taken to improve both the supply and diversity of specialist housing provision, it is less and less likely to be seen as a positive choice and become more of a least worst option. There is a need for greater specificity about the purpose and services that each Extra Care and particularly Retirement Housing setting is seeking to provide and prioritise, for whom

and why. There is a risk that if services become or remain too generic, by seeking to appeal to everyone, they may end up satisfying nobody and become an example of the 'Plasticine Effect' considered in Section 1C.3. It is proposed that by being clearer and giving greater prominence to what is different and distinctive about the services, setting and scope of each site it is more rather than less likely to find a segment of the older population for whom that will be attractive than an undifferentiated lowest common denominator type of provision.

The findings suggest there is a need to question even some of the taken for granted assumptions about what Extra Care or Retirement Housing should or should not provide. The fact that many participants clearly did not favour living in an age segregated setting and resented aspects of the service provision, the proximity to others and the range of needs that and desires that Extra Care and Retirement Housing services were seeking address provides a clear indication of the need for review of the range of options available. But, if services are to become more diversified, then there is an even greater need for more provision to allow people to have real choice about the type of services do or do not want rather than be presented with a sham 'Hobson's Choice'.

This is far from the first study to identify and advocate the need for more provision and greater diversity in the range of housing options required to effectively address the preferences of a growing older population (e.g. Hughes, 2012; Robinson et al, 2019, Hrast et al, 2020). Even in 1976 the government had itself acknowledged there was a need to widen the range of housing for older people (Department for the Environment, 1976), with Butler et al (1983) and the Audit Commission (1998) also making notable challenges to question the assumptions and basis for the perpetuation of established forms of provision. I hope though that it does provide additional resonance and substance both from a evidential and theoretical basis to suggest why this is a situation that does need to be addressed.

## **11B.2 Provision Consequences**

Some of my research outputs, insights and findings have already been considered and used by Housing 21 to influence and shape its policies, provision and practice.

Housing 21 differs from many other housing providers, that seek to apply a uniform and consistent service across all their sites and operations, by seeking to operate according to a devolved service model. Rather than imposing standard service specifications or operating procedures at every site, it seeks to engage with residents through a process of 'choice and consensus' to establish a distinctive set of policies and protocols that tailor the services provided at each of its 500 plus Extra Care and Retirement Housing sites. This is intended to recognise the



need for some matters to be determined by consensus whilst allowing scope for other matters to be left to individual choice and the preferences of individual residents. There are though some financial, legal and regulatory matters and points of principle regarding the scope and delivery of services that Housing 21 reserves to itself and does not permit to be changed even if there is a majority or unanimous desire to do so. This findings from this research have, however, called into question the extent to which Housing 21's services, and its Retirement Housing in particular, have established a clear proposition and the success in distinguishing its offerings according to different resident priorities and preferences. It has also exposed issues where the offering and policy positions adopted by Housing 21 may not accord with the views and wishes of some (possibly a majority) of residents (e.g. Housing 21 has declared that it is a 'pet friendly' landlord and therefore permits residents to have a dog, cat or other pets notwithstanding evidence (#13) that suggests that many residents would prefer to live in a pet free setting).

Housing 21 has committed to increasing the provision of affordable specialist housing for older people and has plans to build at least 800 new properties each year of which at least 75% will be let at affordable rents and up to 25% available for shared ownership<sup>49</sup>. The majority of these will be Extra Care that are intended to be positioned as an alternative to residential care, but this research indicates that particular attention will need to be given to considerations to avoid the perception that these sites could be seen as a form of care home (#26). Housing 21 has also made a commitment that at least 20% of the new properties to explore the provision of 'new models' of Retirement Housing. This will involve testing out new designs and construction techniques, increased use of technology linked to alternative service offers, and collaborating with BAME (Black, Asian and Minority Ethnic) communities of older people and work in areas of greatest deprivation to establish cohousing developments. The findings of this research have provided an indication of the differing preferences and priorities of residents and suggest that there might be merit in even greater and further specification and targeting of provision at particular segments and patterns of demand.

The research has given prominence to the questions highlighted at the outset (in Section 1B.1 and Chapter 2) and that continue to be asked about whether, Extra Care and Retirement Housing are intended to be a 'care' (i.e. safe) or a 'housing' (i.e. secure) offer or whether they are, as appears to be the case by default, capable of simultaneously serving both perspectives. The proposition and implication that arises from the theoretical model is that the service offer would be improved for Extra Care and Retirement Housing and these service would potentially be better understood and appreciated if the provision was more explicit and targeted in residents who

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<sup>49</sup> In pursuit of this ambition, at 31<sup>st</sup> March 2020 Housing 21 had a total of 1,195 new Retirement Housing and Extra Care properties on site and under construction at 19 locations.

wanted either to be cared and have companionship or whose preference was concerned with housing and independence. The consequence of the thesis is that it should also give providers cause to question the significance, nature and purpose of other 'taken for granted' aspects of their specification and provision of Extra Care and Retirement Housing.

Although the distinction between the 'cared for' and 'housing' preferences were found to not necessarily be determined by the age of residents, the research has questioned the merits of the policy and practice of age exclusivity and need for consideration of whether age should be seen as a primary determinant of when people should become eligible for occupation of Extra Care or Retirement Housing.

This research has caused Housing 21 to question the merits of its past practices and previous decisions and to recognise the need to continually test and reassess whether these are still relevant or appropriate given changing needs, preferences and circumstances<sup>50</sup>. The findings and provision consequences should not, however, remain confined to Housing 21. Many of the prompts and indications of preference provided by the participants in this study are also likely to be replicated in the opinions and preferences of older people living in other forms of provision. All providers should be seeking to better ascertain and ensure their provision matches and addresses the preferences, priorities and particular circumstances of the residents they are seeking to satisfy.

### **11B.3 Practice (Research) Consequences**

The opening chapter of this thesis sought to make the case for a continuing need for research in the field of specialist housing for older people. I hope this research makes a helpful contribution to understanding but by doing so I have sought to increase, rather than diminish, the need for further research and understanding of Extra Care and Retirement Housing. It is something of a cliché for a thesis to recommend that more research is required, but this is an almost inevitable consequence of undertaking an abductive study. As Watts and Stenner (2012, p96) emphasised the combination of "Q methodology and abduction represent a system for generating, evaluating and adapting explanatory theories, not for testing them". There is thus a need for further research to test and assess the veracity and usefulness of the micro, meso, macro model that I have advocated. As I noted in Chapter 2, the emphasis of assessment based research appears

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<sup>50</sup> Having previously changed its name from Housing 21 to Housing & Care 21 in 2014 to reflect the growing importance of care provision, feedback from this research about a clear reluctance (especially amongst Retirement Housing residents) to be associated with a care home (#26) prompted a change of name back to Housing 21 in 2019.

to have shifted from a micro/meso evaluation of specific provision to a meso/macro view of what provision is required to meet policy objectives in response to ageing population projections. My proposal is that a way needs to be found to combine and integrate all three of the micro, meso and macro perspectives into research agendas.

It has been demonstrated (in Section 6B.3) that the people providing services and external 'experts' do not always fully appreciate the preferences, position and priorities of residents. This supports the case for more direct engagement and understanding of the preferences of older people. However, previous studies shown that there is an inherent danger that by only seeking the views from established residents about existing services (as was the case in this still study) that their frames of reference will tend to indicate a prefer the service they know and currently receive. There is a danger that if this is not recognised it might result in services lagging behind modern standards and hence becoming outdated because they are failed to keep up with and adapt to changing patterns of preference. It is therefore recommended that studies should also be undertaken to understand the preferences of others, who might be considered potential residents or those who have considered but rejected the service offers of Housing 21 and/or other providers, in order to establish a better and more complete picture.

This research has been confined to participants living in the Extra Care and Retirement Housing of one provider (i.e. Housing 21). It would be an obvious step to conduct additional similar studies to assess the models and perspectives of residents of other providers. This would not only serve to help assess the effectiveness of the theoretical framework and use of Q methodology in other situations and setting, but would also help broaden understanding of the extent and nature of the differences of perspective between different sets of residents living in different types of provision and in different settings. Further studies could also be undertaken to also consider the choices and priorities of those older people who do not currently live in an Extra Care or Retirement Housing setting, older people with different levels of affluence and tenure and younger people considering what housing or care options they might wish to consider in later life and the criteria they would apply in making decisions. Such other studies, however, are likely to require their own specific concourses of issues and statements for consideration.

Because Q methodology provides a perspective as at a particular moment in time, it might also be worthwhile seeking to establish a longitudinal study by undertaking further Q studies over a period of time. Such a series of ongoing studies could be done on an individualised basis to track changes in the disposition and preferences on personal basis, or with a consistent cohort of participants to see how the dynamics of a group are changing or allowing for the potential for new and different participants to join the study to ensure that the perspectives of new resident

were taken into consideration in tracking changing patterns of perspective within a particular setting.

There are also likely to be many other opportunities for investigations in the field of housing and ageing where Q methodology could be also be usefully deployed to understand the range and characteristics of views held about an issue of interest or contention.

## **11C: A Critical Assessment**

As well as reviewing the contribution and consequences of this thesis, it is also sensible to critically review the suitability of the methods adopted, how well they were applied and whether these were likely to have produced credible and plausible results.

### **11C.1 Assessing Q Methodology**

From the outset Q methodology was positioned at the heart of the research strategy, because it is seen as a natural partner for abductive studies (Brown, 1980, p134). Although Q methodology has been described as “the best developed approach to the study of human subjectivity” (Dryzek, 1996, p124), it is not a miracle method nor “the be-all and end-all of empirical procedures” (Curt, 1994, p210). Like any other research approach Q methodology has both strengths and limitations. Q methodology is a method for the systematic study of the subjective perceptions within a discourse on a specific issue or topic (Goldman, 1999) that allows for the detection of associations between the patterns of preference produced by participants and scope for the segmentation and identification of differences of opinion within a population. However, Q methodology does not test participants, measure variables or provide the basis to support or reject hypotheses, it merely exposes perceptions and allows them to be investigated holistically and analytically.

A particular characteristic of Q methodology is that, whilst it describes the nature of the viewpoints that are discernible, it does not determine their prevalence or prominence. The use of mean scores and distribution of results, as shown in Appendix 14 and referenced in Chapter 9, although potentially seen as being of interest and relevance, is not statistically or methodologically reliable. This is because the sample of participants was not selected in order to be representative, even though the profile of some of their demographic characteristics (as shown in Appendix 5) does correspond with the general population of Housing 21’s Extra Care and Retirement Housing residents.

Q methodology has been subject to almost continual challenge and criticism from its detractors since its very inception that its proponents are so particular about protecting the integrity of its epistemology. However, as a consequence Q methodology and its distinctive approach is still not yet widely appreciated or understood beyond a relatively limited community of Q methodologists. Brown et al (2015) argue that part of the problem is that critics of Q methodology, such as Kampen and Tamás (2013), too often fail to properly appreciate the nature of what it is that they were seeking to discredit before launching their attacks.

Kampen and Tamás (2013) challenged three aspects of Q methodology. Their first suggestion was that Q methodology constrained and limited the scope of the studies that could be undertaken. The second concern was that the process of conducting Q studies and analysing the results could distort and impose a false frame of reference on people's opinions. The third allegation was that Q studies were inherently biased and subject to researcher manipulation. Although these points have been refuted and shown to be groundless (Brown et al, 2015), it is worthwhile considering them as a means of addressing these challenges as a means of assessing the credibility not only of Q methodology, but also of the wider scope and research approach adopted and applied in this thesis.

### **11C.2 Was the Scope of the Study Too Narrow and Constrained?**

A criticism that has been levelled at Q methodology is that the views of participants appear to be constrained and limited by the number and nature of the statements in the Q Set that participants have at their disposal, whereas the concourse of things that can be said about a topic is acknowledged to be infinite (Stephenson, 1978). This is not considered to be significant concern as, with any study, there is always a need to set boundaries and exercise judgement in determining territory and field of vision for the research to be undertaken. Fairmond et al (2010) were therefore of the opinion that a well-chosen sample of statements can give a workable estimate of all the relevant issues.

The issues that set the scope for this study were not pre-determined or imposed in order to fit a particular hypothesis or even derived from topics identified in a review of existing literature. Instead they were developed 'bottom-up' from comments made by residents living in Housing 21's Extra Care and Retirement Housing properties about the things that were most important to them and their assessments about things that should or could be done better or differently (shown in Appendix 1). After being grouped and codified into manageable sets of statements (listed in Appendix 2) which were then tested and validated by a pilot study that made some amendments and additions to the original set of statements (as detailed in Appendix 3). The statements was also mapped against a domain form by axes that considered the degree to which

the emphasis of the statement was concerned with people or property matters and also individual or community concerns, in order to check there was a good coverage of statements across these dimensions. A review of the literature and commentary on each of the statement topics was also undertaken (provided in Appendix 4) which confirmed that they appeared to capture and reflect issues of genuine interest and relevance.

Notwithstanding the initial piloting and attempts to ensure the coverage of statements was as complete and comprehensive as possible, all participants were also asked “Were the statements relevant?” and “Were there any comments missing?” after completing their Q sorts, but no issues were identified<sup>51</sup>. However, no Q Set is ever perfect and whilst it is possible to be wise with hindsight it is more difficult to anticipate and avoid every issue in advance. In my desire for the statements produced in the Q Set to feel as authentic and natural as possible (Brown, 1980, p190), I probably did not pay enough attention to the potential for dual interpretations or composite propositions inherent in some of the statements (e.g. #17 – safe and secure; #27 – freedom of choice and not being required to conform). Watts and Stenner (2012, p62) regard ‘double-barrelled’ statements as being ‘problematic’, but Thomas and Baas (1992) and Stainton Rogers (1995) did not share these concerns or consider that participants would have difficulty in using the statements to present a clear impression of their preferences. My observations confirmed that participants did not appear to struggle or have any difficulties in imposing their own interpretations onto these statements.

There were, however, some choices that I consciously made to limit the scope of this study. Although the research was conducted at 5 Extra Care sites and 11 Retirement Housing that had been selected to provide a spectrum of different geographies, features and site characteristics (as detailed in Appendix 5), all the participants were still only residents of Housing 21 properties. Chapters 1 and 2 identified that there is considerable diversity and variety in the nature of the provision of specialised housing for older people and even services with the same name and designation can still be very different in nature when operated or interpreted by different providers. Grimshaw et al (2017) had opted to recruit all the participants for their Q study from just one Extra Care site because they did not want the different characteristics and considerations that would inevitably arise at multiple sites to complicate their analysis. The consequence of this was that the results of the study by Grimshaw et al (2013) were entirely site specific. My research results also relates to specific Extra Care and Retirement Housing sites and provides site specific

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<sup>51</sup> A Retirement Housing resident who came to do the research project but with a list of things she wanted to say as part of the research (having not read the instruction sheet sent out in advance) confirmed afterwards that everything on her list had been covered.

insights, but with the overall combined results providing an indication of the way preferences and perspectives apply across these services within the context of Housing 21. It is acknowledged that additional viewpoints are likely to exist in other organisations, service types and settings, but provided this limitation is recognised and accepted it is not considered to be problematic, as the research is not seeking to prove the truth or completeness of the impressions and preferences expressed, but merely use these to gain insights. Too much variety could also make it harder to discern the basis for differences, hence the benefit in completing separate but parallel studies for Extra Care and Retirement Housing.

Rather than risk confusion by trying to combine the results from residents living in different types of specialist housing and care provision for older people from other providers who may have different service propositions, Watts and Stenner (2012, p54) recommend that separate studies should be undertaken in order to appreciate the potential differences of viewpoint within each cohort or constituency before trying to make any comparisons.

Another key decision was to only research the views of older people living in social rented and affordable specialist age specific housing intended for those of 'modest means' and not to seek to ascertain the perceptions of a wider spectrum of older people with more wealth or living in different forms of accommodation. Whilst getting a better understanding and appreciation of the views and perceptions of a wider spectrum of older people, and those not living in Housing 21's socially rented and affordable Extra Care or Retirement Housing settings, would undoubtedly be of considerable interest, this was not within the scope of the research project I was seeking to undertake. As indicated above, this is something that it would be of benefit for further research to seek to address. The concourse of views of older people who had not considered, decided against or simply been unable to move to a specialist housing setting is likely to cover an alternative terrain and have different characteristics from the perspectives and preferences of people living in such settings and as such would need to be assessed by means of a separate research venture. If I had allowed my research ambitions to range too far and wide there was also a risk that I would have become overwhelmed and never reached a conclusion.

A set of small comparator studies were, however, undertaken with other cohorts of on-site staff, managers and external opinion shapers, working with the same Q Sets but based on a condition of instruction of conjecture about what the attitudes of residents of Extra Care or Retirement Housing would be, rather providing arrays that reflected their own personal views and preferences. The results from these studies were considered in Section 6B.3 (with the details of the results are provided in Appendix 17). This affirmed the importance of seeking views of residents directly rather relying on the assessments of others as well as suggesting areas potentially prone to divergence of assessment, but these issue were not the main focus of my

research. My focus in this thesis was thus deliberately and intentionally confined to seeking an appreciation only of the preferences and positions of older people living in particular Housing 21 affordable and social rented Extra Care and Retirement Housing properties.

### **11C.3 Conduct and Approach to Q Study Analysis**

As Danielson (2015) observed, Q methodology can have a particularly disruptive or discomforting effect for participants intent on espousing only a limited or pre-conceived view, because the requirement to prioritise and present views in the form of an array of statements may not fit naturally with a predetermined narrative. This is entirely different from the concerns expressed by Kampen and Tamás (2013) about what they saw as the potentially distorting effects of requiring statements to be arranged in a quasi-normal distribution. It is suggested that the views of Kampen and Tamás (2013) were based on a misunderstanding of the purpose and consequences of the shape of the grid as used in my Q methodology study, and many others, for presenting and scoring the position of the statements. The justification for having a structure or framework is simply to force the participants to prioritise their views, as it is only through the process of prioritisation that relative preferences are revealed. The actual shape of the sorting pattern is largely irrelevant and the primary reason that a normal distribution is most commonly used is to encourage more careful thought (and hence a better presentation of the views of the participant) to be given to the statements at the extremes. In this study there were a number of participants who when arranging the statement cards on the grid commented and complained that there were not enough available boxes for all the statements they wanted to position as +6, but this merely meant that they had to stop, think and make decisions about which things they really most liked or wanted.

Kampen and Tamás (2013, p1313) also complain that there are mathematical constraints with Q methodology that limit the number of distinct positions that can potentially be identified. There is indeed a natural limit in that the number of factors cannot exceed the number of participants and if the number of participants is greater than the number of statements in the Q set (which was the case in both my combined studies for Extra Care and Retirement Housing) then there is an additional constraint that the maximum number of factors cannot exceed the number of statements. These criticisms, however, seem spurious as with any measurement system there are limits on the number of possible positions that can be recorded (e.g. with a Likert Scale measure the number of positions is dependent on the number of points on the scale). Q methodology is also based on an assumption of 'limited variability' and the principle that, despite their differing values and idiosyncrasies, when individuals are asked about a specific topic or



subject of debate only a limited number of culturally available alternatives are likely to emerge (Barker, 2008, p920). In my Combined Extra Care study with 54 statements and 68 participants I found just three distinct perspectives and for the Combined Retirement Housing study with 50 statements and 157 participants I found four perspectives, so the mathematical constraints of the number of statements or participants did not appear to be significant limiting factors.

There is an additional mathematical restriction that could occur if there was a very limited number of statements and a relatively large number of participants, but this is the opposite of what is normal in Q method studies. With just 4 statements the limit on the number of ways in which the statements can be prioritised is 4! (i.e.  $4 \times 3 \times 2 \times 1 = 24$ ) so if there were 25 participants there would inevitably be a duplication in at least one of the arrays. But as the number of statements increases this risk quickly becomes an irrelevance and with 50 statements there are an almost unimaginably large number of possible ways in which the statements could have been arranged<sup>52</sup>.

#### **11C.4 Scope for Bias**

Because in a Q study the participants each create their own tangible representations of their subjective views it is suggested that this is preferable to other methods that depend upon naturalistic observation by researchers who then have to infer, interpret or re-imagine what participants felt or meant and translate their impressions into a recordable form. As Curt (1994, p26) states “the attraction of Q method ... is its transfer to participants of at least some of the power to define what constitute the stories being told”. This does not, however, absolve a researcher using Q methodology from the need to act responsibly and ethically (as should be the case in any research study). Hence, Robbins and Krueger (2000, p636) considered that claims that Q methodology “distances and removes the bias of the researcher are ... unfounded and epistemologically naïve”. But this does not justify the conclusion that bias is likely to be rife in Q method studies (Kampen and Tamás, 2013, p1314).

It is undeniable that an unscrupulous researcher could (among other things) select Q statements in an unrepresentative fashion, pick participants to present particular views or put pressure subjects to sort statements in a particular way or make unjustified choices in factor interpretation, all with the intention of presenting fake results to fit with a predetermined agenda. But there is scope for fraud and falsification of results with any methodology. Simply because the term ‘social construction’ is applied to a study of views and attitudes does not make

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<sup>52</sup>  $50! = 30,414,093,201,713,378,043,612,608,166,064,768,844,377,641,568,960,512,000,000,000,000$

a researcher immune or absolve them of responsibility for their influence and bias that is to some extent inevitable in the gathering, interpreting and reporting of the results (Hacking, 1999). I have, however, sought to demonstrate that I have applied Q methodology in a manner that is epistemologically appropriate and statistically robust and attempted to explain and justify any judgements I have made.

I have also sought to be ethically aware and demonstrate that my research was not only rigorous, but also respectful and responsible. My role within Housing 21 was obviously a great advantage in getting me through the door of the research sites but I tried to make it clear that was where any influence ended. Whilst it is not inconceivable that some participants might have taken part in the research because it was being undertaken by the Chief Executive of their landlord organisation, I did not give any indication of how I would have liked or preferred the statements to be arranged so it was entirely up to each participant to produce an array that best suited their own particular patterns of preferences. In July 2019 I sent out to the resident participants a summary of the findings and the descriptions and assessments of the different perspectives identified on a combined basis and for their particular site. Responses and reactions to this indicated a general recognition and appreciation that their views were reflected in the findings thus suggesting that the accounts that I had constructed had not been overly contaminated by my own views.

### **11C.5 Research Credibility**

Winter (2000) suggested that the aims of good research should be validity, reliability, generalisability and objectivity, but Bochner (2000, pp268-269) argued that trying to apply traditional empiricist criteria to qualitative research was 'silly' and 'wrong', while Guba and Lincoln (2005, p202) compared the application of positivist paradigms to qualitative research to delivering a Catholic mass to a Methodist congregation. It is important for any assessments of research quality to be aligned to the particular methodological paradigms to which they relate (Ellingson, 2008; Golafshani, 2003).

The validity of research is concerned with its truthfulness (Creswell, 1998, p185), but Brown (1980, p174) suggests for Q methodology "the concept of validity has very little status since there are no outside criterion for a person's own point of view". Without reference to an external objective reality it is not possible to assess the validity of the representation of the person's own perspective. The only practical test of validity for a Q study would be to ask participants to review the array they have produced and to confirm that they are happy that it reflected their views, which is what I did with every participant before recording their results.

Reliability is a measure of dependability, consistency and whether “the method of conducting a study or the results from it can be reproduced or replicated by others” (Neuman, 2003, p187). However, Watts and Stenner (2012, p51) suggest that repeated administration of a Q study tells you more about the consistency of the participant’s point of view than it does about the reliability of the test itself. Brown (1980, p211) also recognises that “as a practical matter it is doubtful that any person in real life, if instructed to take the same Q sort twice ... would ever correlate with himself [sic] as highly as 1.00” and it has thus been suggested that normal test-retest reliability coefficients are more likely to be in the neighbourhood of 0.80 to 0.90 (Frank, 1956; Hilden, 1958; Steller and Meurer, 1974).

As the aim of undertaking this Q study was not to provide answers, but rather to act as the impetus to reveal new insights, there is less of an imperative to demonstrate that an attitude or opinion is fixed (valid) or certain (reliable). It is thus proposed that credibility and coherence are more relevant measures for Q method than validity and reliability (Brouwer, 1992, p3). Credibility is established by adopting sound research methods that produce results based on strong foundations of evidence and analysis. It was interesting to note that the response from Kampen and Tamás (2015) to the rebuttal of their criticisms of Q methodology by Brown et al (2015) appeared to caveat their original position that researchers should not use Q methodology by contemplating that an exception should be made for those doing so competently and having taken the time to understand the gain a proper appreciation of the methodology, its requirements and constraints. My findings and abductions have thus been underpinned by the demonstration of my considered and comprehensive application of the principles of Q methodology. The large numbers of residents engaged from both Extra Care and Retirement Housing and the fact that they were drawn from a variety of sites that were analysed collectively and separately has also added strength and coherence to my conclusions.

The fact that there was a strong consensus view and absence of any shock discovery did not mean that the results are not informative or helpful in creating opportunities for insight and understanding from the views expressed. As well as providing an overall impression of the preferences and perspectives of residents of Extra Care and Retirement Housing this study has offered insights into the specifics of what residents like, dislike or things that do not seem to matter. Comparison of perspectives from different sites gave an indication of the extent and possible contributing influences on local and situational variations. By undertaking a second level of Q methodological analysis on the initial arrays it was also possible to identify key priorities of purpose for Extra Care and Retirement Housing and consider how these compared with one another and to determine whether any particular aspects or attitudes were likely to be attributable to demographic factors of age, length of tenure or gender. This wealth of evidence

thus provided firm foundations for abduction and the proposal of a theoretical frame of reference to connect micro, meso and macro perspectives that might provide a more productive basis for future analysis and understanding of specialist housing for older people.

### **11C.6 Concluding Assessment**

Timonen (2016, p5) identified a need for research to seek out new perspectives and to contribute ideas and concepts that would create the building blocks for the development of new theoretical insights. This is what this thesis has done. My aim was not to find an answer but to suggest alternative ways of understanding and appreciating the nature of Extra Care and Retirement Housing. I hope what I have provided is insight into alternative perspectives and analysis that has not been confined by partial or reductionist explanations about what Extra Care and Retirement Housing is or should be and thereby escaped from what Foucault (1977) described as the 'disciplining effect' and hegemony of an assumed or imposed discourse. Although my conclusions and findings have inevitably been framed by the presentation of this thesis they have emerged from the iterative process of exploratory factor analysis, immersion and interpretation of the empirical evidence that was achieved by the application and demonstration of the potential provided by Q methodology.

### **11C.7 Closing Remarks - A Personal Reflection**

Although this is the end of my thesis, and hence the point at which I will conclude my second PhD adventure, I am sure I will continue my journey to explore and understand the housing and care perspectives of older people. I embarked on this pursuit with a desire to question some of the assumptions that I (and possibly many other professionals) were guilty of making about who Extra Care and Retirement Housing is for, how it should be designed, specified and delivered and why it should be considered to be valuable and important option for older people. I am now moving on with many more clues, evidence and strategies for detection than I had at the outset. There are too many different older people, too many current and potential Extra Care and Retirement Housing sites and too many uncertainties of purpose and policy for there ever to be a final verdict, but this thesis hopefully provides some of the prompts needed to ensure that we keep searching and striving to make these services better and do not fall into the trap of thinking that we will ever have all the answers or will ever find a perfect solution.

I intend to draw on these insights as I continue in my role as Chief Executive of Housing 21 and also hopefully find the time to publish, present and promote my findings to both academic and practitioner audiences. I am sure I will still want to find new ways to engage and gain insights into the views of current and potential residents and I am also certain I will continue learning and exploring, but I will (probably) not be undertaking another PhD.

## **11C.8 A Covid-19 Postscript**

I completed a first draft of this thesis in mid-February 2020 when Covid-19 was still seen as relatively distant problem in the Wuhan province of China, although there were reports of it spreading to Hong Kong, Japan and a number of other East Asian countries. There had been only a few isolated cases identified in the United Kingdom such that the effects of flooding, Brexit negotiations and the removal of free TV licences for older people aged over 75 were generally seen as more serious and immediate concerns. But, by the time I met up with my supervisors to review my initial draft on Friday 13<sup>th</sup> March 2020, the Covid-19 problem had been declared a global pandemic and general spread of the disease within the UK was seen as inevitable and unavoidable. On Monday 16<sup>th</sup> March the Prime Minister advised everyone in the UK against non-essential travel or contact with others and Sheffield University suspended all face to face teaching activities.

As Chief Executive of Housing 21 I was responsible for leading and coordinating the organisation's response to the Covid-19 crisis and also called upon to dealing with a number of other immediate and pressing issues<sup>53</sup> that left little scope or a period of 12 weeks or more to continue working towards finalising my PhD thesis. So much has changed in the world during that three month gap between discussions of the first draft of my research in March and me finding time to resume my studies and prepare a re-draft of my thesis in June 2020 and then changed again in the weeks leading up to submission of my thesis at the beginning of August 2020.

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<sup>53</sup> Making an immediate shift to new ways of working: seeking to ensure care staff were available to cover shifts, enabling office staff to work remotely and using technology to provide a hybrid part at home and occasionally on site Court Manager service. Continuing to provide over 40,000 hours of care a week and putting in place measures to protect more than 20,000 older and vulnerable residents, whilst respecting their rights in a rapidly changing policy and risk environment. Sourcing and distributing over £1 million worth of Personal Protective Equipment to ensure all Housing 21's 500+ sites had enough (but not too much) of the right PPE. Trying to 'do the right thing' by providing meals, improved sick pay and other enhancements to the terms, conditions and rewards for 2,500 frontline care and cleaning staff and a redeployment of other staff to avoid the need to seek support from the Government's furlough scheme. Maintaining essential repairs and safety checks services. Formation of an internal Covid-19 Response Group, fortnightly video Board meetings, weekly video communication and live question and answer sessions. Weekly feedback to MHCLG and liaison with other housing and care providers. At same time I was also undertaking a review of development priorities, budgeting and business planning and having to respond to a challenge from the Regulator of Social Housing and a decision to downgrade Housing 21's governance status in respect of historic rents and a disputed interpretation of the treatment of service charges.

Older people have been those most at risk from the Covid-19 virus and have suffered a far higher incidence of mortality than younger people, but as a consequence more questions are being asked and prominence is being given to consideration of where and the way older people live and are cared for. Will reports of the spread of infection and high incidences of Covid-19 deaths in care homes cast doubts on their effectiveness and if so what will the consequences be for other models of care and support such as Extra Care or Retirement Housing?

It may still be too early to assess the effects of shielding, self-isolation and social distancing on how we live and interact as a society, but these may have an enduring impact on and alter preferences, priorities and expectations of older people. Will there be a greater concern about living in a small flat (#38) or desire to have access a garden or private outside space (#18)? Will residents feel they are more or less safe and secure (#17) in Extra Care and Retirement Housing settings? Will there be even less willingness to tolerate bad behaviour from other residents (#32) or accept living in close proximity to others (#37)? Will attitudes to part-time Court Managers (#3) alter having experienced them working partly off-site from home?

The Covid-19 crisis has highlighted society's dependence upon care workers and other frontline (and often low paid) key workers whilst also drawing attention to the apparent divide and preferential status and standing of the health sector. Will this result in any change or shift in the dominance of the medical gaze?

In the search for a new normal policy makers, providers and older people might do well to consider how their interests could best be brought together and integrated in the planning, design and delivery of services. I hope that, although the Covid-19 scenario had not really been contemplated when I finalised my findings, these may nevertheless play some part in the way we consider the micro preferences, meso positions and macro priorities of older people and the part to be played by affordable and social rented Extra Care and Retirement Housing in a post-Covid-19 future.

## **Chapter 11 Contribution**

*This concluding chapter has sought to summarise the contribution made by this thesis in terms of insight, methodology and theory. It considers the impact and consequences that could flow from it in terms of policy, provision and research practice and makes a critical assessment of the approach and application of Q methodology as a basis to make credible assessments. It concludes with a personal reflection on the on-going nature of learning and appreciation that has been powerfully and poignantly been illustrated by the Covid-19 crisis.*

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# **Appendix 1**

## **Responses from Survey of Housing 21 Residents' Views on Extra Care and Retirement Housing**

*Responses from 173 Housing 21 residents giving views on what they think are the best things and the things they like least about Extra Care or Retirement Housing and asking what Housing 21 should do that it is not doing, what it should continue to do and what it should stop doing.*

## Survey Responses with Extracted Statements Highlighted

Age	Gender	Property Type	What are the best things	What do you like least	What should H21 do that it is not doing?	What should H21 continue to do?	What should H21 stop doing?
56	Female	Retirement Housing	Being disabled I appreciate the compact ground floor living and having a laundry facility and court management at hand. Fairly well maintained environment to live in. No smell of a retirement/nursing home environment. Reception area very pleasant gives a positive impact to visitors.	At times it's very regimented and a small number of residents tend to rule the roost. The social lounge is at times unwelcoming and puts residents off.	Maintain the grounds more- gardening needs doing not just lawn mowing. New fencing needed.	Employ our court manager and give CM's more flexibility and authority. Our CM is brilliant but I feel at times her hands are tied due to bureaucracy.	Stop the new ruling of over 65's only - this will help the courts in ensuring people 55+ have a chance. Sheltered will become retirement/nursing homes and this would be sad and inequitable.
66	Male	Retirement Housing	Easy living and security	I do not see anything negative living in retirement housing.	I can't think of anything	Stay as is	Nothing
78	Female	Retirement Housing	People around (always someone on hand). Hobbies to participate in if interested in certain things.	Living on top of one another (many flats) which can't be helped wished they was spaced out (but can't be helped)	Have a private garden to keep the gardens ok. Residents are getting older and not able to really do it once a week.	Keep activities going as it is nice to get out of a bedsit and socialise look forward to it.	I can't think of anything.
76	Female	Retirement Housing	Having friendly helpful people around. Being able to join in with things happening on Court if you want to. Having a manager to turn to if needed to get help and advice.				
90	Female	Retirement Housing	There is always a friend not far away.	Not having my own front door.	A swimming pool would be nice.	We keep getting equipment updated and I am sure they will continue to do so.	Replace not repair
92	Female	Retirement Housing	I have been here 30 years and am very happy. I like that at Roland Rutter we all have our own front door - no corridors.	There is nothing I don't like.	No I am happy that we are well looked after.	Carry on as you are.	Nothing.
76	Female	Retirement Housing	I like having a Court Manager, caring, supporting and listens to any problems we may have. Company, security. Everyone looks out for each other. Very nice place to live.	Car parking is very poor. Could do with cycle storage	Information should be simple and easy to understand - plain English. Sometimes too much information.	Keep the Court Manager service. Keep updating the Court i.e. kitchens, windows etc. Lift	
73	Female	Retirement Housing	Independence, living near relatives, on call system, manager in Court (p/t)	In house bickering. Unfriendly neighbours, 4 week rent pay (when you have a monthly pension)	More communications from area managers to court meetings. Wilding Court is not mentioned in magazines.	Communications re forward planning of projects. Court representatives in area meetings. Problem - Virgin Media not available in our area.	4 weekly rent to go into monthly payments.



69	Female	Retirement Housing	Not having to worry about the building and grounds. Having a manager and call system if I have any problems. Company	Nothing really	Raise the age for retirement properties as having younger working people upsets the dynamic of the court.	Providing a safe and secure environment for older people to live in. Continue to keep us well informed	Stop calling yourself Housing & CARE 21 at Courts where this does not apply as it gives the wrong impression.
77	Male	Retirement Housing	Security. No gardening, window cleaning etc. The whole concept	Some selfish disruptive neighbours.	Have more senior management visits - preferably unannounced	Provide value for the rent we pay. Concentrate on retirement housing.	I honestly cannot bring anything to mind!!
75	Female	Retirement Housing	1) Knowing you can get help if needed 2) Company always about 3) Various Activities going on	High rents	Consult tenants more frequently	Repairs are usually done quickly	Taking so long to get refurbishments done
79	Male	Retirement Housing	The court makes us feel safe. No cold calling. Having a good heating and hot water system therefore always warm in winter. Independent living with a manager on site. Washing machines and dryers. Having our site facilities and buses and shops close by. Getting together for social events.	There can be petty squabbling - nothing too serious but is annoying. Would be nice if flats were bigger.	Make our front door safe! TV aerial needs updating for flats to take more than one TV (breaking up is experienced at times). Remove "care" in the Housing & Care 21 sign people still think it is a care home.	Keep the manager on site. Keep relevant information coming to the residents. Continue to upkeep of grounds, window cleaning etc. Repaint parking lines	Cannot pinpoint anything at the moment. Very happy with everything.
92	Female	Retirement Housing	Do not have to worry about heating or repairs.	Rules getting changed without telling us.	Care more about tenants and their feelings. Someone from H&C21 to visit every now and again. No one seems to listen to tenants anymore.		Telling us what we should or should not do without consultation.
62	Male	Retirement Housing	Good well maintained secure and safe accommodation. Provision of a Court Manager of significant ability.	Nothing to date.	- Provision of universal wifi. I would be happy to contribute I think it might prove cheaper for all residents. - Arrange for rent to become payable say on first day of the month in	Maintenance of high standards.	Nothing that I can think of.
69	Female	Retirement Housing	Security. Living in a community environment means there are always people around you.	Not everybody wants to be part of the community, which is fine, but it can cause animosity because they give off negative vibes. Together we can achieve more.	Visits from senior management team	Keep the Court Managers. Continue with "Our Voice" meetings. Continue holding the annual conference. Keep listening to residents and keep them informed.	Charging higher rents for new tenants moving into a court rather than charge them the same rent as the existing residents. There should be a set rent for all residents.
79	Male	Retirement Housing	Being private or you can join in with social side of things	No problems		Keep all residents up to date	
85	Female	Retirement Housing	Feeling safe and secure, also the company and social gatherings.	Not having my own laundry facilities.	An electronic door system would be very beneficial, particularly when carrying shopping etc, also for wheelchairs and tenants using walking aids.	Maintain standards as they are at the present time. Which are very good	Allowing tenants to smoke in their flats and outside in communal areas. Letting flats to people who need care which is not available in Cohen Court and which non-residents now class as an 'Old Peoples Home'!

75	Female	Retirement Housing	A secure roof over your head. Companionship. A certain amount of security - fire safety - A good court manager (we have one)	Neighbours - the selfish and troublemakers. I know everyone is different and I accept that but simple courtesy and respect of other people's space wouldn't go a miss	Go back to the original complaints procedure with more than one opinion on the complaint. Do not flower up service charge and call it sinking fund	Be mindful of the needs and diversity of older people age range. People still working at 75 live different lifestyles. Address Dementia by having more group activities.	Stop using consensus or ballot on things that of importance to our welfare i.e. our CCTV camera needed replacing just because it stated that to replace it would have to go on the service charge, I feel H21 should have been the decider.
85	Female	Retirement Housing	This particular court is very central, close to shops, entertainment and transport, and for me personally - as I now live near family.	I'm perfectly happy living in Retirement Housing	I have no complaints	Through its managers. Hope this situation will continue.	I don't have any complaints
94	Female	Retirement Housing	Security. Not having to my own repairs, gardening or outside window cleaning.	No windows in kitchen. Cooking smells from other flats coming through fans especially in bathroom.	Stop tenants smoking in their flats. The smell of smoke comes into passages and into the flats of non-smokers. The smell is disgusting. It is a fire hazard.	No comment	No comment
68	Male	Retirement Housing	All above the age of 55yrs and we all wanted a quiet and safe retirement. My wife and I feel safe and secure as is possible in this day and age. Flat is nice but soundproofing is an issue, but all said and done we are luckier than a lot of people and safer and we are usually very happy with our lot.	The lounge and the kitchen as it is open plan	Checking up on work completed by contractors and maintenance firms, such as grounds, window/cleaning and other work that is contracted by H21	Keeping tenants informed about future plans and listening to tenants' moans and ideas.	Thinking about big issues - instead get the little things right then the big issues should be easier to handle.
82	Female	Retirement Housing	Having a good court manager, very helpful. Good neighbours who give companionship. Pleasant surroundings.				
82	Female	Retirement Housing	Makes me feel safe. Always warm. Never feel alone.	Expensive. Cost of water	Allow residents to have dogs	Have manager on site. Maintenance	
69	Female	Retirement Housing	Security. Always got company. Rent reasonable		Would be nice to upgrade our lounge, plus decorate hall ways.	Keep rents at a reasonable rate	
83	Male	Retirement Housing	Approachable Court Manager, gets repairs done quickly if needed. Good contact with neighbours on the site. More security lights would make everyone feel safer.				
58	Male	Retirement Housing	Support is around if its needed.	You don't treat all courts the same regarding updates.	Improving the inside of the flats like other Housing & Care 21 properties. i.e. Kitchens, bathrooms, heating and smaller boilers all these have been done at Gloucester Court.	Keep up with the meeting like we get on a routine basis	Treating courts differently.
89	Male	Retirement Housing	Access to immediate help	Overwarm in summertime	Consult on financial matters (rent/charges) and advise in good time of any increases	Maintain current services and improve where possible	Making arbitrary decisions

78	Female	Retirement Housing		It is not a care home, getting more older people in at should be in a home been looked after	Make sure windows and doors are locked at night, we make sure are locked 8.30	We lock our flat doors but the lounge and laundry could be wrecked if anyone got in front door	
67	Female	Retirement Housing	For the safety and security in the building. The friendly people and the caring Manager.	As I said earlier the security but at the moment the security is lax. Our front door doesn't always lock when closed, it has to be slammed to close it. A couple of times I have arrived at 10.30pm the door is open. Where is the security?	Better security. Also we have fire doors which are essential, but heavy to open and close, especially people with joint and health problems. Can we have doors that can be touched to open and automatically closed when through the door.	Keeping the Manager.	I would like the 'Care' part removed as some people we talk to think we live in a care home which is wrong. We live in retirement flats.
91	Female	Retirement Housing	Safe. People around to help if needed. People are friendly.		The front door has to be banged to make sure it is closed.		
78	Female	Retirement Housing	Having a Manager to help with problems you may have.	Some people who think they can take over with no consideration for others in some areas of the building.		Ensuring the buildings are made as safe as possible against crime.	I would like to have a camera on the outside of the building but after a census which only some people took part I believe two people did not want it, and so we could not have it.
79	Female	Retirement Housing	You have peace of mind. You have your pendant if you need someone.		I am pleased with everything that is done here.	Go on doing the things you are doing.	Nothing that I can think of.
87	Female	Retirement Housing	Feeling safe. Our great Manager who looks after us and will do anything to help us. Good friends and neighbours. Enjoying coffee mornings and social events.	People wanting to do their own thing.	I am happy with what Housing 21 do.	Having managers come and chat with us to let us know what things are going on at Housing 21, and please keep our Manager and all Managers at courts on. Life is much nicer with a good manager (we have one).	
63	Female	Retirement Housing	Feeling safe and secure. Always having somebody there if you need them. Being part of a small community.	Not everybody wants to be part of a community, which is fine, but it can cause animosity because they give off negative vibes. After all together we can achieve more.	Visits to court by Senior Management Team, as all residents are not able to attend meetings off court.	Keep listening to residents and continue to keep them well informed. Keep the Court Managers. Continue with Our Voice meetings.	Should not charge new residents a higher rent than existing residents pay. All properties are the same. Everybody should pay the same rent.
77	Female	Retirement Housing	Having neighbours around, most of them being in the same situation (widowed, health issues). Being able to get help when needed and well maintained housing.			Continuing in the way it is run, with the residents' comfort and well-being in mind.	
79	Female	Retirement Housing	Having the call system, also a warden that we can turn to for help for almost anything.	Not having a warden living on site.	When a warden is absent from her court for a few weeks. Not having a relief warden on site all the time	Have a warden on site to live in.	We are very satisfied living here Advertising with big banners outside the housing very upsetting.
62	Male	Retirement Housing	Security, day to day running taken care of for example repaired. Manager to advise seek help from	Problems with other residents such as theft and rumour spreading.	Not sure at present	Maintain property security, counselling, advice as appropriate	Not sure at present

67	Male	Retirement Housing	Safety and security, support from court manager, being invited to "get involved" in proposed business projects etc. (Viewpoint), peace of mind and good quality of life.	No dislikes	Doing very well in all aspects	Proceed with policies already in place i.e. Viewpoint	I see nothing wrong so why stop??
75	Female	Retirement Housing	Social factor, no worries about repairs, secure (as can be)	Getting old (ha ha)	Think about housing scooters for people who use them as some flats are too small to keep them in.	Court Manager checking infirm tenants, checks on equipment, boilers, lifts and upkeep of decor	
71	Female	Retirement Housing	Although it is independent living there is company if you need it. Emergency call system	Certain people wanting to know everyone's business. Concerns not being taken seriously.	When there is a resident meeting not everyone can attend in day, perhaps do at weekend or evening. Why are tenants' thoughts and ideas not taken into account at consultation - is the outcome already decided? Have a tenant included in yearly overview of manager	Keep properties updated. Update digital call system with any improvements such as time to answer and volume. Take tenants concerns seriously. Make sure managers are doing job correctly.	
78	Female	Retirement Housing	Independent living with company if wanted	After 10 happy years, the atmosphere has changed due to poor management and behaviour of certain tenants.	Why do tenants not see the outcome of ballots. Should be able to get help with tending own garden areas.	Updating electrical and fire systems.	Taking on managers that are incapable of keeping calm when trying to deal with problems
84	Female	Retirement Housing	There is no need to be on your own every day. You can get together most days. As much or as little as you like in different activities.			Keep a manager living on court	As it is not a care home, do not take people who can't walk unaided or look after themselves.
69	Male	Retirement Housing	Community, safety, security, access to management via the court manager (very good)	Nothing - no problems at all.	Nothing - very happy with the way things are	Continue to maintain the good quality of sheltered housing accommodation	Nothing
77	Female	Retirement Housing	Having security of knowing that help is available at the end of a cord when we are not feeling well. Wonderful situation, water and view, shops etc.	Not being kept in touch of new procedures or changes and being told that either person or situation has been changed.	Taking into account resident feelings and trying to help when a situation arises and not leaving them to try to sort it out	Hold meetings but more frequently	Having a manager who is not available or often off site. No stand-in quite often because assistant is also off. A housing person coming in a few times a week should suffice.
77	Male	Retirement Housing	We wanted to go to the meeting at Nottingham but the manager said she was not going. We still wanted to go, so she told us we could only go in a black cab. We both have mobility problems and cannot get into them, so we could not go.	Nothing	Upgrade kitchens and bathrooms. We are the forgotten Court.		The rents are very high

82	Female	Retirement Housing	Good size accommodation for a single person, well insulated against noise. Facilities included in charges - laundry, gardens (beautifully kept). Resident warden, who is very efficient. Opportunities to socialise if you choose to, but no pressure to have to. Newsletter & magazine - very useful	Nothing really.	I have concerns about the lack of fire escapes for people on first floor, especially in view of Grenfell Tower. Electrical equipment in the communal areas is currently PAT tested by SSE. Should this be extended to all electrical appliances in flats? Even if this meant an increase in the community charge?	Employ high quality, efficient wardens. Maintain property exterior, including windows, gardens. Checks on smoke alarms, fire doors, general health and safety including emergency access. Local conference days - very informative.	Nothing currently.
68	Female	Retirement Housing	We have our independence but with the benefit of Court Managers and a call system. The benefit of being near to other people, so we are not isolated. The benefit of either joining or not joining in with social events.	Nothing. Love it here	Cannot think of anything	Keep residents up to date with all future plans for say, refurbishment, modernisation and financial position of HC21	Increasing rents. I thought the government had put a stop on social housing rents recently
83	Male	Retirement Housing	HC21 approach!	Apart from living in a one bedroom flat - nothing!	Service is superb	Don't slacken your pace! Since living here I've had windows, decoration, kitchen, bathroom upgraded. thank you!	Excellent service all round, don't stop: Window cleaning, gardening, managerial care
83	Male	Retirement Housing	Having good neighbours and feeling safe in your home	There is nothing I dislike about living in H21/Care	More checks on the work on contractors to make sure work is done properly	Carry on the good with the courts	Stop having dogs on courts
69	Female	Retirement Housing	Security and care-line facility	Court politics. Manager tends to favour one resident, who is always in the office and confidences shared with that resident	Employ relief staff to cover holiday/sick/compassionate leave for period in excess of one week.	Good maintenance of exterior of building. Prompt repairs. Good liaison with residents	Allowing residents to give instructions to contract workers i.e. Gardner, cleaner etc. Conflicting instructions, only manager should instruct contractors.
69	Female	Retirement Housing	At mine, feeling secure, a caring court manager on site. Repairs done quickly and a social side to where I live. I still have my independence. Heating is included which saves another bill.	Not having my own garden where I can just walk out to, but we do have seating and green areas.	I haven't live here more than 12months and feel this company is doing a good job.	Care, listen, give good customer service to all residents. Have a manager close at hand to discuss problems and help if and when needed. I really feel we have a good manager who helps residents and I personally had reason to be grateful for.	Nothing. It seems to work well.
72	Female	Retirement Housing	No nuisance calls at the door. Make friends easily. Nice environment	Workmen who do a bodge job (we have them all the time) coming back time and again to do a job that should have been done correctly on the first call.	Possibly paying the above time and again for doing the same job. I do not have knowledge of how the system works. We (the 70 & 80 year olds) had to do our jobs properly. Those speaking English helps	Keep working at getting it right. Bruce Moore is good at his job (it's a large organisation)	Our Court voted over 65's only. But when we voted no pets this was also over ruled (by Bruce Moore). There were reasons why but it should have been up to us. (Why ask us otherwise)

70	Male	Retirement Housing	First and foremost - safety and security, companionship, friendship. Cleanliness of area	Too many moving in with problems i.e. mental health. This is an independent living facility so why should residents suffer from a few who do not respect others. Living in a community requires respect from each and every one i.e. noise after 11:30pm and smells from pets	A need in this building is a kitchen/dining room for residents' communal use. Also, communal storage for storing scooters and other large items. Also, some form of security for weekends when no court manager on site.	Ensure safety and security of building gardens and of course residents/tenants.	Charging management fees - when court managers cover other courts or go for meetings outside.
87	Female	Retirement Housing	We have a court manager and a care/call system which is excellent and no unnecessary concerns			Continue what it is doing	
87	Male	Retirement Housing	Community spirit, friendship and company of people of similar age	High electric bills for heating	Housing 21 should put more wall cupboards in the kitchens. Old people find it hard to bend down to get things out of the lower cupboards in the kitchens. There is only a small gap 11" wide for a refuse bin. We now have to separate refuse into different bins. The council say at least two bins. We have only one wall cupboard in our kitchen	Housing 21 should continue to give good and prompt service and attend any problems raised.	Each flat user should be responsible for their own use of gas and electricity and be charged accordingly - no shared bills.
69	Male	Retirement Housing	Comfortable flat. Independent living with support if needed. Low cost. Activities to join in	Nothing	Supply wi-fi in lounge	Keep up the high standards of the services we have: Court Manager, gardening, window cleaning, gutter cleaning, communal areas cleaning.	'Court news' is not necessary all things in it have been told to us already.
82	Female	Retirement Housing	Feeling secure in your flat. Living in a community.	Not having a seat to sit in the garden	Make the fire doors easier to use they are very heavy especially if the you have walker	Keep communicating	Can't think of anything, it's ok
69	Female	Retirement Housing	Glad we have a court manager and feeling safe in your own flat.	Do wish we could have our own washers cannot stand using the washers that everyone else uses and not enough wash times.	Cannot wait for our lounge redoing, it going to be done this month. I am very happy with what you do now, keep it up	Very happy with the bills being in with the rent, it's just one payment each month. Hope that stays the same.	I am happy with my flat and my court, cannot think of anything I would change.
62	Female	Retirement Housing	Social Events. Company. Repairs done for you. Emergency call service	Nothing. I really like living and I love my flat.	Nothing. I think you do everything that needs to be done.	I think it should continue to do everything it does now. I like the regular meetings and the way residents are encouraged to get involved.	I think it should not stop anything it is doing.
86	Female	Retirement Housing	Safety and Security. Access to seaside resorts. Bus stop outside the door for local amenities i.e. doctors etc.	Decisions made by H21 without consultation with residents, i.e. Sinking Fund Dec 2016, Hedge Fund 2017. No service charge meeting last 12 months	Keep tenants more up to date with current affairs i.e. magazines etc. from the management.	Continue with Regional conferences where we are brought up to date with H21 initiatives and bring us tenants together across the region	Keeping tenants out of the loop.
77	Female	Retirement Housing	Mainly security. Call system if accidents happen. Manager 4 days per week for help with certain problems. Activities and privacy when needed.	Nothing - Personally I never have enough hours in a day to do everything.	Stick to the age limit not younger people.	If the conferences are not going to continue - they should ensure the magazine is published and sent out to keep us all up to date more often.	

82	Female	Retirement Housing	Freedom from the responsibilities of keeping a home in good repairs etc. Knowing there is someone to chat to on site if you feeling lonely. The community life is good.	Some of the restrictions such as not being able to have a bird feeder because of rats	Put up signs visible from the road saying Morris Court. We have visitors who have difficulty finding the place. Not all people have a Sat Nav. We find this a constant difficulty.		The monthly newsletter should be more personable to the court. Most residents are not interested in other courts.
87	Female	Retirement Housing	While I would like a little care now and again I am happy that our manager does within his limits show some care in seeing each day we are at least fit to be up and is ever willing to assist us to live independently in ways he can. We are blest by his willingness to guide us to come together often and even helps to organise activities encourage us to do all we can to be become what I feel a happy family. Though we cannot expect help from one another as one resident said. We older ones talk of pains and aches but fortunately find we can laugh about them. The chance to live independently as long as possible. Knowing we have someone on call to get help for us by contacting our families or someone who can help us.		I feel we are privileged to have a manager who without breaking rule does all he can to provide whatever care he can	Help in every way to keep service charges as low as possible.	It is only a wish but I am disappointed that we all have to contribute to the laundry room. Living in the bungalow opposite the main flats and laundry room I find it more convenient to use my own machine at home and not have to carry washing backwards and forwards.
86	Male	Retirement Housing	Security and companionship	Low numbers of people joining in activities	Put CCTV camera on entrance door	Keep Managers	
78	Female	Retirement Housing	Living in a secure unit and the services of a manager/ warden on site where you are monitored regarding Health and Safety if you are disabled.	Having to live so close to others. Residents who sometimes are not so caring about their neighbours i.e. noise and don't clean	More attention should be paid to complaints of bad behaviour by tenants and harassment within the block- and making sure the manager/warden takes certain steps to contain the problem.	Continue to upgrade the living conditions and do the utmost to change the studio apartments into one bedroom units, making for better living within the complex.	At present Housing & Care seem to be keeping conditions on an even keel. So I think the organisation is ok for now.
73	Female	Retirement Housing	Lovely quiet area - you feel cared for - help cords for emergencies.	I like my independence	Cannot be improved - housing 21 do an amazing job looking after us	Continue to be the best that you can be	N/A
81	Male	Retirement Housing	Communal Lounges for social activities	General bickering between residents over minor incidents. Pilfering of petty items.	Listen to residents and not reject suggestions out of hand.	Work with residents and without favouritism	Stop negative attitudes towards residents' suggestions
63	Male	Retirement Housing	Living with other residents and getting involved in the activities	Cat think of anything as here it's great	Informing the residents of all your changes and not finding out a lot longer	Investment in courts across the country	Stop wasting money
69	Male	Retirement Housing	Not the worry	Nothing	Help more with the gardens	Making people's stay happy	Nothing
62	Male	Retirement Housing	Get people to do more things with the court instead of the same few people that do everything	The moaners and those that won't commit to help	I think that since Bruce joined things are looking up	Not to treat older people like we are daft	I think we are heading in the right way forward

69	Male	Retirement Housing	Being part of a local caring community	Rules made by people who do not live our lives	Try to help us live our lives through our eyes.	Communication & help with all residents	Making too many rules, when we have come to a time in our lives, with have seen & done most thing in life, where we can do without being talked down to and treated like we have lost our intelligence.
64	Male	Retirement Housing	The feeling of security, no need to worry about repairs and maintenance. We are lucky in having a resident court manager that gives us a feeling of safety as we are in an area of anti-social behaviour and drug abuse.	The paperwork needed to carry out decorating in our flats.	Less form filling and paperwork when we want to have new floor coverings or decorating done.	I feel the resident court manager scheme needs to continue and where there aren't any they need to be introduced. Perhaps ensure that residents that cause trouble after a written warning can be evicted. We have a couple here that are disruptive to the congenial atmosphere of the Court and it appears there is little H & C 21 can do about them.	Nothing that I can think off
75	Female	Retirement Housing	Low cost, secure tenancy, security, independent living with help on call when needed.	What's not to like????????? We have been here 6+ years and are very happy.	A much larger community hall - ours is too small have cope with 53 flats, too many chairs that are much too heavy to move and not enough space for activities. I do believe we are down for a refurbishment.	To carry the modernisation programme.	Since we have had our new court manager everything in so much better so it is difficult to think of anything that H&C21 should stop doing.
77	Female	Retirement Housing	The best things are: the area, nice flats, you are not expected to join in court activities if you don't want to.	The age gap between residents i.e. age 55 - 90 as an example. Do not have same interests. Younger people may be working	Communicate better. I have been at the court for many years and the communication has not improved. We are rarely told when we have a repair when the person will be coming. Each court should prepare a leaflet letting new tenants information, i.e. when the dustmen are coming, rules that apply to the court. Doesn't have to be pages just a small leaflet	Better communication and don't assume because we are retired we do not have anything outside our flats to do.	
69	Female	Retirement Housing	For me the situation of our court. Having 2 wonderful managers. My own front door as opposed to being in a corridor. I find it claustrophobic. Ground floor. Transport, tram stops directly outside our court with bus stops a short walk.	Having to use a laundry room. So many residents are not respectful regarding care of the machines or the room itself. They leave the filters uncleaned and washing machines often 'smell' as some don't use washing products just water.	I know there are many things being worked on already such as the scooter problem and I hope there will be stricter control over who uses them. Not everyone here actually needs one, they can be inherited or just bought without an assessment. We are losing a facility due to scooter storage which I think is a shame.	Visit and involve residents regularly, I think it is really appreciated. More opportunities to mix with other courts would be nice as well.	I really can't think of anything. I have absolutely no complaints and am very grateful for all that's done for me to enjoy and get the best out of my retirement.



73	Female	Retirement Housing	Having a court manager offers support without me losing control, she helps and is present when required, but gives me back control when I am able to manage. Being able to maintain my independence. Security Responsibility for gardening, window cleaning etc. being managed by housing 21. The flats are upgraded at all times, H21 distributing finance fairly to encompass well maintained courts Residents viewpoints are taken into consideration when work on court is undertaken. The joint lounge is very well used, we meet daily and have various outings and entertainment The social club is a bonus and provides stimulation and friendship	I am not antisocial and enjoy gatherings and outings, but I like privacy and value it highly. The residents are over-zealous at times in the quest for information re others or myself. I worked in a job which required confidentiality and I maintain this in retirement, perhaps at a cost to myself	Try more to encourage residents to be involved in viewpoint, and involve more courts to share good initiatives	Maintain court manager as this is an invaluable service. Maintain courts as this is a good selling point when letting flats. Continue open approach to information	Chopping and changing staff above court manager level and maintain consistency
59	Male	Retirement Housing	Being independent, with support either on court during the day and a pull cord 24 hours of the day	The "politics" involved in maintenance, gardening, window cleaning and the likes. Otherwise It really has been a health changer during my 2 years as a tenant.	Promote your court managers and their roles, some tenants give them no respect and "confuse" their job descriptions.	Charge affordable rents.	I can't think of anything
67	Female	Retirement Housing	1. Security 2. Gardens/properties well maintained 3. Laundry facilities 4. Emergency alarm system 5. Maintenance/repairs taken care of 6. On site manager 7. Communal room facilities	I can't think of anything I don't like about living in retirement housing.	If anyone has a problem, all it takes is a telephone call or visit to the office where your query/problem can hopefully be sorted out. Having said that, I would like to see a more positive attitude towards the residents via the two monthly Court News sheet. I get the impression that the office staff feel constantly irritated by the residents' problems and that many residents could easily feel that they are being a nuisance towards the office staff, thereby putting off reporting a problem they may have. Maybe a more-light hearted attitude, would be appreciated.	1. Keep the tenants informed of any building maintenance that will be taking place, dates etc. 2. Any changes in rent. 3. Regular Court inspections.	Can't think of anything that Housing & Care 21 should stop doing - just keep on doing what you do well, keeping the residents happy, secure and content in their surroundings.
67	Male	Retirement Housing	Having the reassurance of the pull cord system for emergency Opportunity to make new friends. Security.		Return to the ethos of the original sheltered housing and encourage court managers to be more like the old-time wardens. Have managers living on site.	Keep court managers, keep pull cord or similar alarm system.	Sending surveys....."Just joking" Changing the way that the service charge is calculated and presented so that it can be understood and compared from one year to the next.
69	Female	Retirement Housing	Own independence & the reassurance of a court manager on site + cord system	Ageism, too many busy bodies	Listen more when we have complaints. Be it rude neighbours, repairs etc.	Up keep of property & maintenance	Can't think of anything at the moment

73	Female	Retirement Housing	Having <b>no worries about maintenance</b> . Although <b>we can't expect 100% security, we have an acceptable amount</b> , which is enough! <b>I can close my apartment door and I'm in my own little oasis!</b> Bliss! But if I <b>choose, I have the choice to join in on any court activities</b>	<b>Independent living</b> is the main concern, at <b>times we are treated like naughty children, by the court manager</b> , as though we have no common sense! which is highly insulting. <b>I don't think it's necessary for a full-time court manager</b> . I think this is the main drawback! <b>Living in a close community is always going to cause some problems, but that's minor, the plus side is much greater!</b>	<b>Not enough attention is paid to complaints</b> , residents need more back from H21 in acknowledgement when they have voiced or written with a complaint, H21 is too complacent with this! I think you should keep closer watch on the courts and court managers, they have complete autonomy, which is not always a good thing! The very fact that the salary of court managers and cleaners, is a service chargeable item, should <b>give residents more input into what we want!</b>	You have provided us with a home of fairly good standard for which I greatly appreciate. But as for anything else, I can't see you doing any more than what we pay for in our service charges	<b>Ambiguity of car park signs in our car park, saying residents only, on one of the signs, of which no one pays any heed to. Visitors just park where they want!</b> And now another notice just installed saying private parking and no thoroughfare? Waste of money!
60	Male	Retirement Housing		<b>Nosiness of other residents</b>	Everything is fine	Everything it is doing	
79	Female	Retirement Housing	1. That we have <b>a Court Manager who lives on Court</b> . 2. <b>Knowing that I am safe and secure because of the new digital system</b> . 3. <b>Living around people of the same age group</b> .	<b>People who think they can do the job better than the Court Manager</b> .	<b>Tell the residents of future plans quicker than they do</b> .	1. Most important to me is, keep the Court Manager on site	Try <b>not to take the Court Manager off the Court too much</b> but still expect her to keep up with her work load.
79	Male	Retirement Housing	<b>Secure Tenant Secure Rent Very good living conditions</b> Belonging to a thriving <b>Social Club</b> At our time of life <b>Being Maintenance free</b> .	<b>Poor quality Contractors No Quality Control after Major Works completed by H 21</b> .		Save your Tenants a fortune by setting up H21 Quality Controls. <b>Answer Q to our satisfaction</b> .	Wasting our money by employing sub - standard Staff. Thinking about <b>installing GAS into our Premises is plain Stupid. Would you trust your elderly Parents with a Gas cooker?</b>
69	Male	Retirement Housing	<b>People around me I can engage with or I can simply close my door and be alone</b> . I can and have, got involved very much in the <b>Private Garden</b> we have. Didn't have that before. I am also <b>becoming known as 'that chap who fixes things'</b> and I just love that. I have built my own computers in the past so retuning a Resident's TV is nothing.	The Sea Gull's that keep us all awake throughout the night!	There is not much in this area, apart from the Gull's I mentioned. <b>Management, locally need a bit more freedom</b> I feel.	Review matters regularly.	

65	Female	Retirement Housing	Security of knowing I could get help easily, if required, living alone. Also with a private landlord they could decide to sell the property and that would mean moving at a time when it's not convenient or affordable.	Not being in control of appointments. People just turn up to test alarms or do jobs with no notice.  I joined viewpoint in the hope that residents can have a say in what might affect their lives. Housing 21 is a business but housing is the most important commodity to the residents. Future expenditure ..... it would be good to ask the people it affects what the most important thing to them would be to spend money on. Quite a number I know would prefer to spend money on changing to more efficient, cheaper heating than decorating and lighting both of which are certainly not dire currently. The storage heaters are archaic	More resident involvement. I know some can't be bothered but some are and would like to give their view on what affects their lives.	Provide secure housing for those people, especially single people, that require it.	Making decisions without resident consultation on important matters that directly affect them. Even if it makes no difference to the outcome.
74	Male	Retirement Housing	Security of tenure	H&C21 systems for sorting out court problems are Bureaucratic and therefore difficult for residents to resolve	Make it clear what residents can and cannot do in regard to H&C21 Choices options for residents. We get conflicting information from manager, area manager and paperwork coming out of the Viewpoint Forum	Listen to residents	Changing their working practices so often. One minute we are told the rules are one thing then we get a change of area manager and are told something opposite.
67	Male	Retirement Housing	People of the same age group,	This type of housing as a high percentage of people with social problems drink, and mental health issues	Investigate why the rents on the one bedroom flats are up to £7.50 a week different for identical flats	Improve	Employing full time managers on courts of less than 60 units
66	Female	Retirement Housing	Security. Court managers. Communal facilities.	Selfish neighbours.	Give residents more information about costs and spending.	Continue reviewing retirement housing to ensure its fit for purpose & updating as appropriate. Consulting residents re all aspects of services.	Taking residents who are not retired into retirement housing.
62	Male	Retirement Housing	Having the property maintained for you. Security, advice available. Friendly environment.	Some residents not following what few rules that there are or thinking that they own all of the communal facilities.	Improve on heating provided.	Provide safe secure environment.	Unsure at present.

72	Male	Retirement Housing	<p>Security is an asset. It provides a chance to be with people who are prepared to help each other, especially if a person has no family or family live miles away.</p>		<p>Our area manager has cancelled 3 meetings with residents to ratify the court's expenses because we found cause for objection. Expenses should be approved by the residents.</p> <p>Managerial duties should be given to a stand in manager and not to the daily cleaner.</p> <p>I was told that you pool all profits of all courts which means our courts profit, assist in renovating other courts. Each court should have its own true profit and loss. Lift maintenance estimate should be the local price and not that of the country as a whole. Something else we were told and not a true value for this court.</p> <p>Managers should have a more relaxed involvement in the community area and help in promoting interests.</p>	<p>Update the flats asap particularly the kitchens and heating.</p>	<p>Stop using cleaners as stand in managers.</p>
79	Male	Retirement Housing	<p>Companionship and Security of Tenure</p>	<p>The overall appearance of the front of court is let down by tenants being responsible for all the plants planted to the front some do very well others not so good others are perhaps disabled or too old, the result neglected areas making the frontage look uncared - for this encourages vandalism and litter to be practised by some members of the public no respect for one's own property no respect by others could this be overcome by Care 21 if they hired professionals to bring some uniformity to our homes</p>		<p>Keep involving residents in as much of the running of affairs as possible</p>	<p>Paying for the services inadequate tradesmen</p>
69	Male	Retirement Housing	<p>Support from a court manager -- particularly with practical aspects of living, such as repairs, but also with advice. In my case, heating being included within the service charge. Being a member of a community -- I talk about my flat rather than my home, at least partly because, to me, the community as a whole is my home.</p>	<p>I find it difficult to think of downsides for me. One has a bit less freedom to make what H&amp;C21 would consider to be unwise decisions, than if one was living independently. I have heard one or two others, particularly immediately after they first move in, feel that they have lost some privacy.</p>	<p>I think I have seen H&amp;C21 treat staff with less consideration that they would have treated customers -- I am thinking of redundancies. This may be 21st century life, but I don't think that justifies such behaviour. I wonder if there should be more attention to gender balance. I would appreciate more information about the guest facilities at individual courts Making courts more dementia friendly - I've been told that H&amp;C21 doesn't want them to look institutional.</p>	<p>Provide a court manager. Maintain a full and meaningful programme of customer engagement. Remain committed to the principle of supported housing -- I'm thinking of the fridges issue which I saw as a step away from that.</p>	<p>I can't think of anything.</p>

81	Male	Retirement Housing	A feeling of security - from the outside world - and a home for life. Also, the neighbourliness among fellow residents.	The trend away from neighbourliness towards rather selfish/ independent living	What you consider doing or promise to do is too long term. We need a magic money tree!	Invest in retirement housing at a greater rate. Remember the years of zero investment and use of funds to buy loss making businesses	Possibly not making long term promises or ideas that do not happen.
80	Male	Retirement Housing	Peace and quiet. Amongst Friends of the same age. A lot of worries taken away in old age.	When grand-parents bring in children who cause noise.	Release new policies and procedures to residents, as they used to through the Forums.	Keep residents informed of changes as they happen. Continue with the Conferences and let us have a say.	Letting to people under the age of 60
80	Male	Retirement Housing	Independence	nothing	Improved telephone connections and broadband	everything it does at present	
64	Male	Retirement Housing	The fact you are left alone to enjoy your retirement and also knowing that you have a pull cord system to hand	Not being able to have our disability BUGGY close to us	Act faster on problems	Listen to all tenants not just managers	Waiting so much time on decisions
71	Female	Retirement Housing	Friendship and surroundings		Not advising us in advance when any changes are to be made with regards to new rules.	Keep up with modern equipment/fittings	Treating residents like children
69	Female	Retirement Housing	No worries about repairs, more stable than private renting.	I like the community feel but sometimes can be a bit too much in your face!!!!	Modernisation, don't overlook the small things like replacing internal doors, we get a lovely modern kitchen but the internal doors are very utilitarian.	Working on property improvements.	I think they do need to ensure that any court rules are adhered to.
78	Male	Retirement Housing	Security of tenure. Good back up if a problem occurs.	Restrictions caused by communal living	Not a lot. I am happy with the service	Provide a safe and secure environment	Nothing
70	Female	Retirement Housing	An on-site Court Manager, opportunity for social events, emergency call system	Limited parking facilities	Update the website with relevant news items.	Retain the Court Manager service, continue to make improvements to properties, retain the kerbside appeal funding, installation of wifi in communal lounges	There is nothing that comes to mind immediately, my experience with Housing 21 has been positive
55	Female	Retirement Housing	The security, and lack of hassle, i.e. gardening, cleaning windows etc. Also, knowing that someone is there if you need them.	Some of the petty things that go on between residents, also residents, that think they don't have to follow the rules, i.e. leaving doors open etc.	Access to an easy list of other properties available, especially for the guest rooms.	Residents' safety especially in view of the recent Grenfell fire, and ensuring residents stick to the rules.	I am not aware of anything that needs to be stopped, but a fairly new resident.
70	Female	Retirement Housing	Manager support, communal get together, security access and emergency button.	Makes you feel old, depressed because of constantly hearing about illnesses and silly complaints.	Carry out repairs, updates on time and when promised. Consider safety - Court car park now getting dangerous.	Keep rents and service charges as low as possible.	Spending money on unnecessary item e.g. Too many meetings, circulars. Outsourcing for building work locally instead of having contractors that waste time and money travelling therefore spending less time on site.

72	Female	Retirement Housing	It feels really good to be living in the lovely environment of MORRIS COURT! The grounds are special, not too many residents, great manager (Ceri Remnant), very nice living quarters, communal lounge where we have communal and individual activities including free tea and coffee, TV, lunch clubs twice a month, coffee mornings every Tuesday, Tea and coffee on Friday afternoons. Really comforting to have security systems in place for easy access of all residents, fire alarm tests on a regular basis, maintenance, etc. All good!! Thank you for enabling us to live in such a safe environment!!	I would prefer not having to have our usage of the laundry room for washing and drying our laundry curtailed by 7:00 pm each day...but that is a minor detail. All else good!	I had two recliners when I came to Morris Court but was told that I could not keep them in the shed on the premises. My STUDIO flat is too small.	To keep everything that we currently have...or better!	Nothing that I can currently think of!
75	Female	Retirement Housing	Security and safety	Nosey people. People think that because we live in a complex that everybody should know all their business. Living in retirement housing does not mean that everybody on the court has to know everything about everybody or that they have to do everything together. Also, a lot of people have outside interests, friends, and family and don't want to live in each other's pockets.  Communication is not very good for instance we are not always told when somebody is coming to our flat for a repair. I think residents should be aware of Housing 21s rules as well new people do not always know the correct procedure for instance for getting or doing things in your flat, or regarding how we have to vote for gardeners and window cleaners.	There should be some sort of booklet for new residents informing them of some of the rules and procedures. Court Managers when new should be aware of all Housing 21s rules, and obviously there has to be some rules. They should also make sure that each courts lounge has been assessed for how many people can be in the lounge, and whether the kitchen can be used for cooking for a crowd as some kitchens are not equipped for cooking for many.		
71	Male	Retirement Housing	your own place	You never keep a manager for more than a year	Keep staff and drop service charges	look after people	
67	Male	Retirement Housing	Well maintained properties no need to worry if repairs etc. required.	Lack of inclusivity. Small groups of tenants tend to run things. Lack of court manager involvement - quote from manager on my arrival "I manage the court I have no involvement with tenants /activities"	More attempts to engage all tenants in courts - viewpoint / conference etc. rely on mobility to attend plus tend to be attractive to those who want to be involved in depth. Managers need to engage with tenants not just manage day to day running	Consult tenants. Maintain property to high standard	As things stand would question need for full time manager in each court especially when two or more courts are in close proximity- this applies to retirement housing not extra care

76	Female	Retirement Housing	Independent living with the security of manager and the benefits this provides	I don't have any dislikes or reservations of living in retirement housing	I do find lack of communication a frustration, it seems to me an ongoing thing	Keep employing managers and continue looking after residents as you do.	I think, certainly from where I live, all seems fine.
88	Female	Retirement Housing	No worries re Gardens or Maintenance of Property. Knowing there are neighbours at hand. Reliable care line	Problems amongst residents which lately appear to divide Court so unnecessary	Think carefully about residents who have Dementia and the problems they cause where we are told if anything is said to the more serious cases that 'We are Abusing them'. This is hard to live with and Court Managers need more training in managing all of this	Provide attractive surroundings consider the security of the Court when it is hired by outside clubs. Court Managers have little contact with residents now because of amount of technology used	Resident Managers
69	Female	Retirement Housing	Safe environment, and no property repair worries.	Sharing communal areas.	At this present moment in time H21 seems to be ticking most boxes.	Keep in touch with residents on all things.	Nothing I can think of.
86	Male	Retirement Housing	Feeling safe	Lack of communication with Area Manager and above. Feeling ignored and that tenants don't matter.	Listening to the tenants	Get good understanding Managers. Listen to the tenants after all we are all different.	Stop assuming that all courts are the same and that all tenants are the same.
70	Female	Retirement Housing	None	THE CONSTANT ARGUING OVER WHOSE BOSS AND THE CLICKYNESS OF CERTAIN PEOPLE WHO THINK THAT THEY OWN THE BUILDING	INTERVENE AND STOP THESE PEOPLE	MONITOR THE SITUATION AND STOP IT	LETTING CERTAIN PEOPLE TAKE OVER THE BUILDING
80	Male	Retirement Housing	The fun associated with friends and neighbours and the use of a communal lounge. The opportunity to find out what H&C21 are doing for residents and themselves nationally.	The cost of maintaining an unresponsive Court Manager.	H&C21 is doing ok but maybe not saying so.	Continue to communicate as with Viewpoint, Away Day meetings.	Raising service charges and employing full time court managers.
76	Male	Retirement Housing	You do not lose your independence, but you are living within a community of people your own age group. Most of all there is always something going on if you wish to join in. There our welfare is taken care of by the court manager should we need it	To be very honest there is nothing to dislike. It's all I could have wished for and more. Thank you!!!!	Please continue to think of residents as people, and not just a money bank.	Remain true to good values and principles.	First and foremost always remember other companies must go a long way to better H&C 21 and good ethics will keep the company at the forefront of the industry.
74	Female	Retirement Housing	Security maintenance	No problem - I like it all	Update door entry systems	Look after our wellbeing and security	Telling us what we can have in entrance areas
62	Female	Retirement Housing	Personally, knowing there is help, if I need it.	Living in such close proximity to other people.	Maybe think about being more environmentally friendly.	Communicate regularly with residents.	Changing rules.
90	Male	Retirement Housing	near seaside - small nice and quiet and close many seaside locations	Since British Legion left communication very poor	bring up to date a very old site needs t.l.c. and stronger manager	improve communications from HQ through to residents	

65	Female	Retirement Housing	I FEEL SAFE FROM OUTSIDERS AND HAVE A DAILY CALLS FROM THE COURT MANAGER WHAT ADDS TO MY SAFETY WE AS TENANTS HAVE A RICH SOCIAL LIFE	ELECTRIC STORAGE HEATING IS EXPENSIVE AND STILL QUITE COULD	GAS HEATING IS WHAT WE NEED THE MOST	FOR NOW, JUST IMPROVE OUR HEATINGS	SHOULD STOP ALLOWING HAVING DOGS. WHEN I MOVED IN I WAS TOLD IF I HAVE A DOG I CAN HAVE HIM BUT NOT TO BUY A NEW DOG. NOW TENANTS ARE BUYING DOGS AFTER MOVING IN. USING SAME WASHING MACHINES TO WASH OUR CLOTHES AS DOG'S BEDS. WHAT ABOUT PEOPLE WHO ARE ALLERGIC TO ANIMAL HAIR?
67	Female	Retirement Housing	Security court manager a community secure door entry a tablet so you can call for help and an ambulance and be able to contact your friends in nearby flats a social club to join for social events and days out and be able to contact the manager for repairs to be done to be able to sit out in the garden with friends in the summer and feel safe	If you are an out-going person and like mixing with people then these are ideal places but, if you are quite and not a very out-going person then these places would feel quite daunting	feed back to the residents on what's happening even in courts some residents have not got a clue what's going on even in their own courts it sometimes feels like everything is one big secret and we are the last to know and we live there	look after its residents because they live in your courts it works both ways we need you and you need us	in the court I live in it's very nice we has rules and regulations but we have the odd hiccup now and then but we run pretty well if all the court managers run there courts the housing 21 way and not make it up as they go along then it's a good place. to live
68	Male	Retirement Housing	On call care	A good community spirit	Do not know	Provide warden control good safety	Nothing
79	Female	Retirement Housing	Manager on site if there are any problems. Good social life on most courts and no need to feel lonely. Most courts seem to be close to a bus stop which also means easy access into town thus further combating loneliness.	Do not have a downside at the present time. I still have a voice and join in what I want to do. Independence is my main concern with help available if needed. Best of both worlds!	After main works are completed i.e. New showers installed someone from housing 21 should meet with residents to ensure that all is well and people are satisfied. We have had new showers installed but now all guarantees have lapsed quite a few problems are arising i.e. water not draining away etc.	To carry on with improvement programme on kitchens, bathrooms in flats and also keeping communal areas in good modern condition. Carry on doing the good improvements as you are doing at the moment. I think housing 21 doing a great job!	Taking in people under retirement age or at least under 60.
73	Female	Retirement Housing	Companionship and security	Some of the patronising notices that are put up like Now switch off the light (in the Laundry) Now wash your hands or remember to wash your hands (in the hall loo)	Can't think of anything	Have full time court managers	changing the goal posts eg changing the age of coming into the various sheltered accommodation. Painting the insides of our personal flats regardless of how long we are resident. I moved into my flat in 2004 (not redecorated) told that it would be painted within two years, then three years then five years and now only when a flat is vacated!! It even mentions a time of five years in my tenancy agreement not that this counts for anything!!
62	Male	Retirement Housing	reasonable letting management practices compared to the private sector where there is little or no regulation, which can lead to sharp practice and bullying.	Lack of individual garden.	give scheme managers more support by area managers spending a day -a-month on each court to give a second set of hands to help resolve any problems.	ensure no courts are falling behind the group in decoration/repairs standards	giving their top table such high pay packets



61	Male	Retirement Housing	That there is a <b>Court Manager on site, or, if not available, the pull cord service.</b> Just gives <b>peace of mind</b>	Not sure	My wife and I are on the Complaints Panel and reimbursing expenses is taking up to four weeks. Why can there not be a 'float' or petty cash available in order to reimburse people on the day of the event?	Never forget it's ethos and what it represents	<b>Spending money needlessly</b>
61	Female	Retirement Housing	Peace of mind knowing that we are safe and secure in our home. We like the idea that we only have to pull the cord and someone will be there to help in case of emergency.	There is nothing I dislike about living here.	<b>Make time to speak to residents, to ask if they have any real concerns.</b>	Do not forget housing&care21 ethos nor should they forget where they have come from, or who the residents are.	<b>Wasting time and money on things that don't really matter.</b>
80	Male	Retirement Housing	<b>Having a Court Manager, Pull cords in an emergency,</b>	<b>The starting age (55) is too young, people are still working at this age and don't interact with older residents.</b>	<b>Stop bullying on courts.</b>	<b>Keep costs down by making sure contractors do not overcharge</b>	??
63	Female	Retirement Housing	<b>Not having to worry about maintenance on a property or massive heating bills</b>	<b>Being treated as though you are stupid at times because you live in this type of Housing plus not everybody being treated the same and maybe too much gossip being listened to by management</b>	<b>Let us have more say in what is going on I know you do try but it doesn't always filter down also I would like copies of what has been agreed on the tenders for the gardeners and window cleaners as we don't really know what they are supposed to do. And being able to say if a job isn't being done right without fear of repercussions</b>	I do find that you are very good at the top at listening and trying to implement what we ask for but for example in my Court we asked for a resident only parking sign as the parking can be horrendous at times the sign put up does say private parking but not residents only. I also feel a follow up letter should have been delivered to each flat to <b>let everyone know that from now on the car park is for residents only not visitors</b> as to be honest it as bad as ever	I think you are a good company and there are only little things that need tweaking
70	Female	Retirement Housing	Friends that I have made since I moved here 4yrs ago and the <b>social activities that we arrange amongst ourselves.</b>	at this moment in time I would have to say my <b>court manager and her negative attitude</b> to most of the residents, plus the nit picking and the back stabbing that goes on.	misinformation from hc21 and their staff have caused disagreement between residents and cm, tell the truth.		<b>saying one thing and doing another,</b> eg things like showerhead cleaning is no longer being carried out and then MSM still calling to do just that.
69	Female	Retirement Housing	<b>Feeling more secure and having a Court Manager contacting you on a morning to ensure you are all right. I think social activities are good, although I do not attend all myself. I also like having the use of a laundry as you do not have to worry about getting washing dry when the weather is bad.</b>	<b>Not being able to have a gas supply in order to cook by gas and have gas central heating especially as some Courts do have these facilities and sometime at our Court we have to wait a lot longer for things such as Virgin Media and Wi Fi, new kitchens and bathrooms.</b>	<b>Give Courts Managers more support with any problems they have with regard to difficult tenants.</b>	To <b>continue to improve its Courts.</b>	<b>Pressurising Court Managers to rent out vacant flats thereby causing them to be rented to inappropriate tenants for a particular Court.</b>
68	Female	Retirement Housing	<b>Independence but support at hand if needed, friendship, companionship, security of building</b>	Nothing	<b>More information about when improvements are being done at each court</b> instead of vague dates.	<b>Listen to the needs of each court as they will differ from court to court</b>	Just sending emails etc. to court managers they should come and tell the residents them selves

84	Female	Retirement Housing	Friendship. Able to help one another. Opportunities to interact with other residents - community times. Building and amenities kept clean, tidy and presentable to all who visit	Nothing	For me - nothing thanks	Keep a good and interested and interactive Manager	No idea!
68	Female	Retirement Housing	Sense of community, feeling safe, not feeling alone, social events, nice surroundings.	Nosiness and gossip.	Communication throughout the organisation is better than it was but there is always room for improvement.	Stay committed to it's modernisation programme. Continue to involve tenants in what is happening in the future.	Nothing
76	Male	Retirement Housing	I have all the support we need and day to day concerns are taken care of i.e. leaky taps etc. We also enjoy the company of others at social events.	There are no dislikes.	I am very happy with what is provided.	Provide on-site managers.	
69	Female	Retirement Housing	Secure premises, no maintenance worries, landlords bound by laws relating to social housing, no gas, water..., all included in service charges Really good news.!	Rules and regulations unclear ie... are we allowed to have relatives to "flat sit" while we are on holiday?	Keep in touch! Visit the courts and speak to a few of the residents unannounced like secret shoppers then you will see for yourselves first-hand what is good and what can be improved. I think it is important that good communication between residents and the powers that be are in place. Make sure that if we are told that work is going to be started within a certain time frame that it happens. Prevent Chinese whispers! Managers can pop a notice on the board. Ensure managers are abiding by the "no pals" rule. Difficult I know, but should be respected... rules are rules.	Ensure rents and services are fair, that the property is kept up to the good standard that it is at present, that management keeps us informed. Invitations to conference are given to all. These are very important, enjoyable and they give residents a chance to talk to those members of Housing 21 that we may not otherwise ever see! Always held at very good venues, easy to travel by road or public transport so accessible.	Do you think that full time managers are essential in retirement homes? A part time manager should be adequate because no care at all is involved. Even someone coming in three days a week seems more appropriate.
69	Female	Retirement Housing	The community feeling and there is always something going on if you want to be involved. I like the fact that if I need a maintenance job done in my flat I can contact my Court Manager who will help sort things for me. The feeling of contentment living here. I feel very privileged to be living here.	People grumbling when it is not necessary - BUT - that's life - so nothing!	Making information / news sheets shorter as sometimes they are so long and involved that important info can be overlooked.	Keep the Court Managers.	Asking for volunteer residents to attend the fire alarm when The Court Manager is not on site.
70	Male	Retirement Housing	Feeling safe	Gossip it's a nightmare	Get court managers to manage the court not us that live there	Update training of staff	Take the word Care out of courts that are not care
61	Male	Retirement Housing	Safety with social activities	Costs	More training for management reduce the costs of service providers	The security of residents. Helpful staff	Should listen to residents more
70	Female	Retirement Housing	peace and quiet when we want it, social activities when we want	living amongst people of similar ages	be transparent regarding management salaries	keep us informed about the future of all courts	adding so much to our service charges - i.e tree surgery, gutter cleaning and colour printing

76	Female	Retirement Housing	Security of tenure, repairs taken care of through the maintenance charge, a CM who will assist if a problem arises.	Wherever one lives, there will always be some people not as friendly as others - so just ignore them	It doesn't cause me a problem but I think an area for mobility scooters etc. to be kept would be a very useful thing	Select tenants as much as possible	Allowing any 'old Tom, Dick or Harry' to come and live in a nice court
65	Female	Retirement Housing	We are on the ground floor so -no stairs. Help at the end of a pull cord. A knowledgeable manager - will either know the answers or find them out. A great group of gardeners. A friendly group of residents ready to welcome newcomers. Most of whom will help out with something they can do - from making posters, baking or washing up.	You do get very close to neighbours - we've become quite a community so it does hit very hard when we lose perhaps 3-4 friends in a short time. A few of our latest buyers are close to being 55 and still at work so it's harder for them to join in our daytime activities so we don't mix as well. It's also harder with people from a different culture.	Managers could be taught or shown how best to deal with grief when a court has a lot of empty properties perhaps they could help with open days, advice to the families of those properties.	I have found by attending the 'roadshows' not to be scared of the Housing 21 staff - you are all good fun, very approachable, and very knowledgeable. We try to relay this but - especially the older and disabled who sit staring at the walls they still keep away. We do have regular visits from Sally Evens, perhaps she'd like to visit someone that doesn't have reasons to see her and they may get help on both sides.	Try and work out if we are 'Housing 21' or 'Housing and Care 21'. Personally I don't get the 'and Care' so I object to letters from the 'and Care' heading at the top of the page. Stop trying to work under two names. Otherwise very good.
79	Female	Retirement Housing	After my husband died I made a very positive decision of sell the family house and downsize. This is Leasehold so I released some capital but still "own" my flat. No house maintenance or garden to worry about. (Well, must get permission to do most "improvements" in my flat)	This site was built 40 years ago so many things need up dating, it appears it is impossible to improve access to Community Room, Widen the narrow paths to comfortably take walkers, now used by so many folk. Good news though, the only washing machine in the Laundry was replaced in 2 weeks which was good. I love the idea of a retirement flat BUT new ideas / and improvements seem impossible	Communications. Some easy way to report minor repairs and knowing they were being attended to. .	Retirement flats are a super idea. BUT the Relations and general public need to know they are independent living and will not be "looked after".	Taking so long to communicate as to whether ideas are being taken seriously or just "a silly idea" by old folk who have little or no clout.
67	Male	Retirement Housing	The potential of not having to worry about the maintenance of the court	The actuality of having to worry about the maintenance of the court	More pro-active maintenance is required to maintain (or restore) the quality of the property	Communicate with residents	No comment
70	Male	Retirement Housing	No teenagers or noisy families. Having been able to acquire the property for 70% of its open market value, thus making it possible to move to London from the North.	Nothing I don't like.	Hard put to think of anything. Our Court Manager is very good.	Getting the right people as Court Managers.	Nothing.
65	Female	Retirement Housing	I feel safe. Some of the maintenance concerns are taken care of. New friends.	The restrictions because I don't own the freehold of my property. Also in my Courts case the lack of access to the manager for the residents.	Provide an office for the manager so there is more access for residents. Also provide more notice when the Area manager is visiting the court. Work quicker to install the new digital emergency call system to all courts.	Communicate with residents.	Taking too long to produce annual accounts.

77	Female	Retirement Housing	I am in a Leasehold retirement apartment. The best thing about it is security, privacy and if needed companionship.	My pet hate is the word CARE in our title as locally people look at us as a care home and not "Independent Living"!	I think basically there should be more communication with the residents. We need more leasehold only meetings with management for Q/A sessions as leaseholders here feel like the poor relations in the organisation	Listen to the leaseholders more	Not listening to Leaseholders concerns and worries
65	Male	Retirement Housing	The provision of the Court Manager service.	nothing really	just keep doing things well and don't change just for the sake of change	Court Manager service above anything else	politically correct statements on literature and Court notices etc.
77	Female	Extra Care		They are putting in too many sick people in here this is only a few able-bodied people left. It is very depressing	Put more people in that are not to sick		Not putting in very sick in Retirement is having a good social life with other residents which we don't have here. We have a good court manager
75	Female	Extra Care	Feeling safe as it is secure.	Came here because it was independent living - it's not that anymore!	Getting back to independent living. We've got no chance of selling our properties now because it's more like a nursing home.		Putting very old and very sick people here, it's now like a nursing home and people are dying not long after moving here and it's very depressing. It's not what I brought into.
83	Male	Extra Care	Security, availability of assistance in case of medical emergency, social support	This Court was built on site of a poor area. The car insurance premiums are based on old post code data and therefore reflect former risks. Fiesta costs between £500 and £600	Increase car park security and thereby reduce car insurance. Get contracts under control so that companies like Keepmoat can no longer adopt their cowboy approach to quality. Get the gardens sorted they are inadequately maintained.	Continue to provide the support and services it presently provides	Nothing
81	Female	Extra Care	The feeling of being secure - someone there if and when needed. This was one of the main attractions for me. Easy to maintain flats, although I would prefer the kitchen worktops a little lower. No need to feel lonely, always someone to talk to.	Underfloor heating, not enough ventilation, having to pay for own repairs, whilst paying a substantial amount of service charge. This is my pet dislike.	Have more direct contact with resident. I for one would like to see more interaction between the courts.	Going digital. I am one of the people who didn't change with the times and now regret it. I'm quite willing to learn as I believe this is a good thing to do in later life: delays dementia!	Do you know I can't think of an answer to this one so you must be doing things right
74	Male	Extra Care	Safe environment and planning for the future when care may be needed	As a leaseholder - concerns over residents in rented accommodation which was not fully explained when we purchased our property	Ensure that residents are treated with respect and their views listened to rather than Housing and Care 21 imposing its own policies	Provide care for those who need it	

73	Female	Extra Care	Security and the knowledge that some sort of care would be available when needed.	Management not realising that we (the residents) have a lifetime of experience and knowledge and we understand more than you give us credit for. People with dementia are given flats and are unable to cope. There is always a risk of fires being started because they are confused. The carers are not qualified to deal with dementia residents so is not fair to either party. There is a resident here with mental problems who walks around improperly dressed and is aggressive which is very embarrassing for visitors and relatives.	Not waste money by cutting corners, listen to us because we are the ones it is affecting. Please treat staff (carers and cleaners) better. The accounts department needs looking at as a lot of people here have had dealings with the department and found them unsatisfactory	Keep up good communication and visits from head office. Make sure repairs are done promptly.	Allowing people that have dementia to take up residence I understand that it can happen to anyone and it might happen to me. But I do think it would be quite frightening to be in an environment where people didn't understand me or my needs. When a resident develops dementia whilst living here everyone understands and tries to help until such time as they are moved on to more suitable accommodation
68	Male	Extra Care	Security of our apartment, the facilities that the scheme offers and knowing that there are care staff in the building 24/7. A very good and supportive administration staff.	Having to pay for the Core Charge when one is not using it.	Ensuring that repairs are carried out within the published time scales which at present is not happening i.e. defective lights internal and external, water leaks from roof windows. Ensuring that security gates are locked and not open to the general public.	There are many good things that the care service continues to do very well on a daily basis in particular the cleanliness of the building and the ongoing care of its residents and grounds maintenance work. These things need to continue for the court residents but also to attract other people who have a desire to reside in the building.	Giving unrealistic/promised dates when major repair works will be completed. Sending out duplicate invoices for care charges from both external and internal offices when this would save a large amount of postage costs Keeping lights on 24/7 in parts of the building where it is not required especially during the summer months, this would could down costs on electricity bills. Getting external contractors to do minor repairs that could be easily done in house by a maintenance handyman based at the complex.
65	Female	Extra Care	Peace of mind - knowing that when I need the care it is available	Too much gossip/too much political in that you have to be careful what you say or it can be construed the wrong way/not involving everyone putting the emphasis on the apartments instead of treating us all the same	Stamping out the gossiping and the ones that stir the trouble up makes uncomfortable living	Treat everyone's information confidentially and try as best to make them feel happy with their environment	
71	Female	Extra Care	you can come go as you want the staff are lovely	I don't think there much I don't like apart from it gets too hot	Have more ventilation in the flats and clean the chairs in the lounge	The managers have less time for training	
71	Female	Extra Care	Lovely flat and wellbeing in case of emergency	No privacy, too many rules, parking problems and no control over your environment	Listen, communicate and follow through	When they say they will do something actually do it	Saying they will do something and then nothing gets done

76	Female	Extra Care	Apart from down-sizing and able to manage the upkeep of the apartment, it is security and assurance carers are on hand 24/7 if we ever have an emergency situation.	When we purchased our apartment the ratio was 20 rented and 20 leasehold and we felt confident our money was well invested. The situation now is 30 rented and 10 leaseholders, which is not a good balance. The Service Charge is a big concern, having had to challenge the budget figures. To date after many consultations and engagement meetings, things have improved.	Many physically challenged residents constantly ask for more activities, so help towards co-ordinating possible opportunities for this to happen i.e. volunteers.	Keep engaging, listening and replying and please give more consideration to leaseholders.	Not sure what to say.
67	Female	Extra Care	safety and reassurance that if I need help someone is on site to help	the issues relating to my safety is not taken seriously and not understood. repair company used by H&C21 treat me and my neighbour /other residents as if we are senile and talk down to us. I have been repeatedly patronised.	respect your lease holders with a meeting for lease holders we have been asking for the last 2 years. realise that we are retired people on a fixed income and that we cannot sustain the current deficit increasing year on year and being asked to pay huge amounts extra to our service charge, without an end in sight, also there is no provision for energy saving solutions.	respect and care for all residents and value their opinions and listen to their concerns	treating residents as numbers instead of people.
75	Female	Extra Care	We are taken care of. Although I do feel if Housing and Care 21 were to take over the care packages at Kingsway it would all run much smoother, instead of the mish- mash care deal we all get now.	The community feeling and the way everyone joins in	Take over the care from I Care	Keeping the gardens tidy also get security at weekend sorted out	
62	Female	Extra Care	I think it is excellent, excellent staff that work hard. I feel safe and reassured with staff around. It's a brilliant place. The library and care are really good. Chef is brilliant.	Nothing	I would like to see a little shop, more group activities and outings	Everything	Nothing
79	Female	Extra Care	We have care night and day, if needed, also security and safety. Please visit sometime.	We seem to have more people who are confined to their rooms. Not enough younger people, not enough social life or activities suitable for us. No help with problems we have. We have to wait for repairs which sometimes I have waited weeks for.	This place seems to need TLC, getting very tatty in some places. I am 2nd floor, store room needs clearing out of old rubbish chairs, wood, hoovers, fans, should only be home rubbish. Sometimes it smells, more often than not. The room is now stacked with books. NO ONE READS on second floor.	Make sure hand rails on lifts are replaced, lifts are always breaking down. We have no afternoon tea and cakes, shuts at 2oclock in restaurant. A visit from you would be nice to air our views. We have no air conditioning in restaurant or room on 2nd floor (LIBRARY)	My answer a few more 1 to 1 talks with us.
86	Male	Extra Care	Availability of 24 Hour care, socialising	Inter-com is by door and one does not always hear		All it does at present	
87	Female	Extra Care	Depends on which court you live in as to the care you receive.		Some kind of management 7 days a week i.e. a rota! or mornings at the weekend. It is never recorded that a manager has paid a daily visit.		Using the communal lounge/dining room when regular social events are held for the residents as this social event is sometimes the only event they have.

77	Female	Extra Care	Nothing, it's miserable. Not allowed to ask how people are. <b>It is supposed to be independent living, but we have several people that we have to report to straight away if they attempt to go out.</b> We end up in trouble if we try to help people and if we discuss anything about yourself e.g. problems and medication you get slapped with an ASBO from court manager.	Not being able to move within our block. I have a fear of lifts and have been put on the 3rd floor.	Accept responsibility, be fair when dealing with people. Be approachable and be willing to help and give advice. <b>Stop giving ASBOs without a complete and proper investigation.</b> Make sure all people are spoken too, not just the person making the complaint and their witnesses, talk to the accused and their witness also.	<b>So many things are now not allowed to be done,</b> our managers have changed so many things it is impossible to list all the things that need to be changed back.	Having <b>part-time managers.</b> We have 2 managers that pass the buck between each other, even though you said they wouldn't. When training we lose 2 days of manager cover instead of just one. Stop employing <b>managers who talk down to residents and gossip about other residents' personal dealings with them.</b>
63	Female	Extra Care	We are <b>well look after and I feel safe</b>	Nothing	Nothing at present	Extra Care	Feel at present all is ok
83	Female	Extra Care	I love <b>the freedom it gives me, to live my life as I chose</b> etc. Meeting friends, doing two exercise classes per week, while at the same time <b>there is plenty of company here, if you need it.</b> Plus <b>activities to join in.</b> We have <b>some lovely social evenings,</b> so there's nothing more I could want. I am very happy living here. Thank you	I don't think there is anything I can really single out for this one.	It's <b>concerning that people moving into this development are suffering from dementia.</b> As residents, we do our best to help these people, but we worry about the impact it may have overall on this development as they progress with the illness etc. Getting out of the building and becoming very confused.	Just to <b>look after us, the way you are doing</b> now. Oakley Gardens gives us a very safe <b>environment to live in.</b> <b>It feels like belong to a big family.</b>	I think again, I can't single out any one thing
71		Extra Care	<b>well planned apartments</b> but am afraid not much else	<b>Very little communication. Frequent turnover staff.</b> Came <b>here to retire not to live in a care home which I am afraid it feels like.</b>	More communication with Court Managers and residents. if residents do not go in the communal lounge they often are not told of developments.	Sorry but I have no answer to this. I know this is a very poor write up buy I am being truthful.	<b>Treating residents as if we are patient's in a care home rather than starting to interact with us as intelligent people.</b>
76	Female	Extra Care	<b>On site Carers when needed</b>	<b>Miss my own home</b>	<b>Keep residents more informed about everything. TOO MANY TRAINING DAYS FOR MANAGERS AND MEETINGS</b> and clients are asking what are these days about as residents don't know if these training and meeting days in any way benefit them and we are left more and more without a Court Manager on site, plus sickness plus holidays when we are Paying for a FULL-TIME MANAGER.	<b>Ensure we receive a F T MANAGER service which we pay for and cleaning services of building is done and more stringently monitored.</b>	Having less training and MEETINGS that take MANAGERS away from sites leaving clients asking WHAT IS ALL THIS TRAINING for when we have no feedback.
78	Female	Extra Care	<b>you are never alone Help is available at the push of a button.</b>	Nothing really,	nothing I can think of	<b>keep onsite manager</b>	<b>sending out as much paper work that is for the noticeboard and too much to take in.</b>
64	Female	Extra Care	<b>Care on site 24/7 if needed. Communal areas for socialising. Building kept in good order, not having to worry about large bills</b>	sometimes <b>some residents get to know too much about your own private business</b>	there is <b>lack of communication in some departments</b>	<b>give value for money and keep up with customer engagements</b>	

61	Female	Extra Care	NONE	EVERYTHING	NEED TO GO BACK TO THE BEGINNING PULL IT DOWN AND BEFORE STARTING AGAIN NEED TO CONSULT PEOPLE THAT WILL BE LIVING HERE AS WELL AS CONSULTING O T's ETC TO SEE WHAT IS NEEDED FOR THE DISABLED, PEOPLE WHO HAVE THE ONSET OF DEMENTIA, ASKING THE ELDERLY WHAT THEY WANT INSTEAD OF ASSUMING WHAT THEY THINK THEY SHOULD HAVE. WHOEVER DESIGNED THIS PLACE SHOULD BE MADE TO LIVE IN IT.	NEED TO RESIDE IN A PLACE LIKE THIS TO SEE WHAT IT IS LIKE 24 HOURS A DAY, 7 DAYS A WEEK. DON'T COME HERE PRAISING EVERYTHING THEN AFTER A FEW HOURS WALK OUT THE PLACE AND NOT HAVE TO COME BACK	TREATING US LIKE CHILDREN, THREATEN TO GIVE US ASBO's IF WE HAPPEN TO SWEAR
83	Male	Extra Care	1. Restaurant (6 days each week) 2. Care on site 3. Wide doors giving good access and good sized flats. 4. Large lounge with tv and good seating 5. on site manager Monday-Friday (care on site 24/7) 6. wide range of residents which aids social activities	Damage to walls , doors, carpets and lifts caused by electric scooters	When refurbishing some form of protection to protect furnishings etc. from damage caused by electric scooters also lay out rules to govern speed inside	Communication with residents	Nothing I can think of
67	Female	Extra Care	Help is there should you need it but you still have independence	Nothing	Try to retain care staff!!! Have first aiders trained to use the defibrillator	Listen and act on what residents have to say	



## **Appendix 2**

### **Initial Q Set of Statements**

*Initial Q Set of Statements extracted from survey responses.*

## Initial Q Set of Statements Extracted from Survey Responses

- #1 A court manager to turn to if you need help and advice**
- #2 A resident manager or warden who lives on-site**
- #3 A court manager only employed on a part-time basis**  
(86 comments)
  
- #4 Good location close to shops, amenities and transport**
- #25 In a nice area with attractive surroundings**  
(12 comments)
  
- #5 No need to worry - maintenance and repairs are taken care of**
- #6 Repairs or problems are addressed and fixed quickly**  
(42 comments)
  
- #7 The 'kerbside appeal' of the Court creates a good impression**
- #40 Buildings and gardens are kept clean and tidy**  
(27 comments)
  
- #8 Companionship of neighbours so you are never lonely**
- #23 Community spirit and friendship with people of similar age and outlook**  
(58 comments)
  
- #9 A lounge and other communal facilities**  
(17 comments)
  
- #10 Peace of mind that comes from being looked after**  
(49 comments)
  
- #11 Living around people of a similar age and outlook**
- #12 Occupancy restricted to only retired people aged over 65**  
(26 comments)
  
- #13 Residents are able to have dogs or other pets**  
(4 comments)
  
- #14 Having security of tenure**  
(11 comments)
  
- #15 Having a communal laundry room with washers and dryers**  
(14 comments)
  
- #18 A garden or balcony so you can sit out in private**  
(8 comments)

- #16 **An effective and efficient heating and hot water system**  
(12 comments)
- #17 **Feeling safe and secure**  
(75 comments)
- #19 **Social events and activities to get involved in**  
(31 comments)
- #20 **Availability of a good internet connection and/or wifi**  
(6 comments)
- #21 **Pull-cord or pendant to summon help in an emergency**  
(30 comments)
- #22 **Sufficient car parking spaces**  
(7 comments)
- #24 **Your own home with your own front door**  
(9 comments)
- #26 **Reference to 'Care' on Housing & Care 21 signs and documents**  
(10 comments)
- #27 **Freedom to live as you choose: no requirement to join in or conform**
- #30 **Residents are engaged and able to exercise choice and control**
- #31 **Residents are treated with dignity and respect**  
(86 comments)
- #28 **Independent living**  
(30 comments)
- #29 **Able to have your say and raise matters with senior management** (22 comments)
- #32 **Bad behaviour by other residents**
- #33 **Residents who take control and assume responsibility for organising things**  
(42 comments)
- #34 **People don't respect privacy or confidentiality**
- #35 **Gossip spreads quickly**  
(18 comments)
- #36 **Residents with dementia or who need to be looked after**  
(17 comments)
- #37 **Living in close proximity to others in a compact community**  
(15 comments)

- #38 Small flats**  
(8 comments)
- #39 Properties have been modernised and improved**
- #41 Contemporary kitchens and bathrooms**  
(42 comments)
- #42 Checks on fire, electrical, gas, asbestos and water safety**  
(8 comments)
- #43 Everyone is kept informed and up to date about local plans and activities**  
(59 comments)
- #44 Information about costs and charges is correct, clear and comprehensive**  
(40 comments)
- #45 Wide doors, that are easy to open, for people with reduced mobility**  
(4 comments)
- #46 A reliable lift**  
(2 comments)
- #47 A suitable storage area for buggies and other large items**  
(7 comments)
- #48 Good staff are retained to provide consistency of service**  
(7 comments)
- #51 Care staff on-site 24 hours 7 days a week if needed (EC)**  
(8 comments)
- #52 An on-site restaurant (EC)**  
(3 comments)

# **Appendix 3**

## **Revisions to Statements Following Pilot Study**

*Details of revisions and additions to Q Set statements as a result of the pilot study.*

	Original Statement for Pilot Study	Revised Statement
01	A court manager to turn to if you need help and advice	A court manager to turn to if you need help and advice
02	A resident manager or warden who lives on-site	A resident manager or warden who lives on-site
03	A court manager only employed on a part-time basis	<b>A court manager who is only employed on a part-time basis</b> Minor clarification to make statement read better
04	Good location close to shops, amenities and transport	<b>Close to shops, amenities and transport</b> Remove value judgement from statement as it is participant who assesses the merits of proximity so not have this presumed by the statement
05	No need to worry - maintenance and repairs are taken care of	<b>No need to worry about maintenance and repairs</b> Minor clarification to confirm this statement is about a lack of worry with specific regard to the repairs and maintenance service
06	Repairs or problems are addressed and fixed quickly	Repairs or problems are addressed and fixed quickly
07	'kerbside appeal' of the Court creates a good impression	<b>The appearance of the Court creates a good impression</b> Feedback that term 'kerbside appeal' was not familiar to some participants
08	Companionship of neighbours so you are never lonely	Companionship of neighbours so you are never lonely
09	A lounge and other communal facilities	<b>Use of a communal lounge and other shared facilities</b> Minor clarification to make statement read better
10	Peace of mind that comes from being looked after	Peace of mind that comes from being looked after
11	Living around people of a similar age and outlook	Living around people of a similar age and outlook
12	Occupancy restricted to only retired people aged over 65	Occupancy restricted to only retired people aged over 65
13	Residents are able to have dogs or other pets	<b>Residents are able to have dogs, cats or other pets</b> Differences of opinion regarding dogs and cats as pets, so reference cats as well as dogs to avoid creating bias against statement from 'cat people'
14	Having security of tenure	<b>Having security of tenure</b> There was a good level of understanding of what security of tenure is and means and was seen as a useful statement
15	Having a communal laundry room with washers and dryers	<b>A communal laundry room with washers and dryers</b> Minor clarification to make statement read better

	Original Statement for Pilot Study	Revised Statement
16	An effective and efficient heating and hot water system	An effective and efficient heating and hot water system
17	Feeling safe and secure	Feeling safe and secure
18	A garden or balcony so you can sit out in private	A garden or balcony so you can sit out in private
19	Social events and activities to get involved in	Social events and activities to get involved in
20	Availability of an internet connection and/or wifi	Availability of a good internet connection and/or wifi
21	Pull-cord or pendant to summon help in an emergency	Pull-cord or pendant to summon help in an emergency
22	Sufficient car parking spaces	Sufficient car parking spaces
23	Community spirit, and friendship with people of similar age and outlook	Community spirit and friendship with people of similar age and outlook
24	Your own home with your own front door	<b>You have your own home with your own front door</b> Minor clarification to make statement read better
25	In a nice area with attractive surroundings	In a nice area with attractive surroundings
26	Reference to 'Care' on Housing & Care 21 signs and documents	<b>Being seen as a form of care home</b> Reference to Housing & Care 21 considered to be too specific and reason for not liking signs is due to perception of being associated with care home
27	Freedom to live as you choose: no requirement to join in or conform	Freedom to live as you choose: no requirement to join in or conform
28	Independent living	Independent living
29	Able to have your say and raise matters with senior management	Able to have your say and raise matters with senior management
30	Residents are engaged and able to exercise choice and control	Residents are engaged and able to exercise choice and control General understanding of what being engaged meant and that this was a means to exercise choice and control over living environment
31	Residents are treated with dignity and respect	Residents are treated with dignity and respect

	Original Statement for Pilot Study	Revised Statement
32	Bad behaviour by other residents	<b>Some other residents behave badly</b> Remove judgement – nobody would want bad behaviour but may have different views about how the behaviour of others affects them.
33	Residents who take control and assume responsibility for organising things	Residents who take control and assume responsibility for organising things
34	People don't respect privacy or confidentiality	People don't respect privacy or confidentiality
35	Gossip spreads quickly	Gossip spreads quickly
36	Residents with dementia or who need to be looked after	Residents with dementia or who need to be looked after
37	Living in close proximity to others in a compact community	Living in close proximity to others in a compact community
38	Small flats	Small flats
39	Properties have been modernised and improved	<b>Properties and facilities that are modern and well designed</b> An Extra Care Court may have been developed recently so statement shouldn't ask about whether properties have been through a process of modernisation and improvement but merely assess the importance of them being modern and well-deigned.
40	Buildings and gardens are kept clean and tidy	Buildings and gardens are kept clean and tidy
41	Contemporary kitchens and bathrooms	Contemporary kitchens and bathrooms
42	Checks on fire, electrical, gas, asbestos and water safety	Checks on fire, electrical, gas, asbestos and water safety
43	Everyone is kept informed and up to date about local plans and activities	Everyone is kept informed and up to date about local plans and activities Local understood to be about things relevant to the particular Court and in the local area and so distinguished from corporate/provider policy issues
44	Information about costs and charges is correct, clear and comprehensive	Information about costs and charges is correct, clear and comprehensive
45	Wide doors, that are easy to open, for people with reduced mobility	Wide doors, that are easy to open, for people with reduced mobility
46	A reliable lift	A reliable lift



	Original Statement for Pilot Study	Revised Statement
47	A suitable storage area for buggies and other large items	A suitable storage area for buggies and other large items
48	Good staff are retained to provide consistency of service	<b>Good staff who provide consistency of service</b> Reference to retention removed as covered by consistency and emphasis given to quality of the staff
49		<b>Common lounge used by external organisations and groups</b> Additional statement: sometimes advocated that sheltered housing communal facilities should act as a 'community hub' but there are known to be differences of opinion and some resident resistance to opening up and sharing these with external groups and organisations
50		<b>Guest room available for visitors</b> This is a common feature of sheltered housing and has been used as justification for small one bedroom and studio flats so considered worth testing the relative importance of the provision of guest rooms
51	Care staff on-site 24 hours 7 days a week if needed (EC)	Care staff on-site 24 hours 7 days a week if needed (EC)
52	An on-site restaurant (EC)	An on-site restaurant (EC)
53		<b>Hairdressing salon on-site (EC)</b> This is a common feature of Extra Care housing so considered worth testing the relative importance of the provision of a hairdressing salon
54		<b>An accessible bath for those that want or need it (EC)</b> This is a common feature of Extra Care housing so considered worth testing the relative importance of the provision of an assisted bathing facility

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# **Appendix 4**

## **Context for Statements**

*Details of research and commentary on the issues covered by the Q Set of Statements.*

# Context for Statements

## Details of research and commentary on the issues covered by the statements

### RE-ASSURANCE (Supported, Safe and Secure)

- #1 A court manager to turn to if you need help and advice
- #2 A resident manager or warden who lives on-site
- #3 A court manager who is only employed on a part-time basis

In 1972 a Working Party set up by the charity Age Concern found that, as a consequence of the lack of clarity and general confusion about the purpose of grouped dwelling schemes for older people, it was difficult to spell out with any certainty what role the warden employed in such schemes is expected to perform (Willcocks, 1972, pp58-59). The Working Party identified four elements of the warden's role as "general supervision of tenants and property, general assistance, emergency duties and grouped social activities" (Willcocks, 1972, p23). The Working Party, however, sought to avoid the term 'good neighbour' despite its "pleasant and emotive ring" because conceptions of what this meant could vary so significantly: it could be construed as "someone to rely on in emergencies, for common services, for friendship and for psychological support" or it could be seen as someone "who does not interfere, who keeps himself to himself and who is not hostile or offensive" (Willcocks, 1972, p23). But it has been suggested that for many residents the essence of the role of the warden or court/scheme manager continues to be seen as being an "omnipresent good neighbour" (Lloyd, 2008).

By 1998, the Audit Commission acknowledged that the role of the warden had evolved significantly from its good neighbour origins as a general dogsbody, but they still considered it to be underdeveloped (Audit Commission, 1998). The assessment of Lloyd (2001) was that ideas about what a sheltered housing service is and how it might be delivered were changing and "the untrained 'good neighbour' resident scheme manager or warden ... is rapidly being replaced by professionals" (p10). But, despite 'warden' being considered to be an outdated description incompatible with a professionalised service (Thompson and Page, 1999), the term 'warden' is still widely used, particularly by residents (King et al, 2009).

Although Fennell (1987) had suggested that having "at least one full-time resident warden is a defining feature of sheltered housing" (p23), this is no longer seen as being an essential (Lloyd, 2001) or a realistic requirement (King et al, 2009, p84). Best's (2013) view was that nobody still truly believes that residents of retirement housing all "need the shelter and protection of a live in warden and the supervision of their daily recreation" (p165).

Thompson and Page (1999) identified the four aspects of sheltered housing that residents most valued as:

- Knowing somebody is there in case of sudden illness or other emergency
- The daily visit – someone is keeping an eye on you
- Somebody who will listen – who you can go to for advice
- The combination of security, support and sociability.

They suggested that the court or scheme manager was an essential element of all these features. Lloyd (2001) found that “residents valued highly the personal support role of their scheme manager in providing information about services available and being the point of contact with a wide range of professionals” and that “they value too the scheme manager’s role in creating a harmonious atmosphere and in facilitating, but not managing, social activities” (p10). Although “the psychological security provided by having a resident scheme manager was important ... the resident scheme manager on-site and on-duty is recognised to be an illusion” (p10). Despite now more often being non-resident, only on duty between 9 and 5 on weekdays and frequently absent at training days or team meetings, “residents still see the scheme manager as being responsible for their safety and security” (Lloyd, 2008). But even though it is the support element that makes sheltered housing attractive this is the element of the service that is now being eroded (Lloyd, 2008; King et al, 2009).

Cousins and Saunders (2008) echoed the unfairness claims of Middleton (1982a) and called for the replacement of wardens with a floating support service only for those with an assessed need. King et al (2009) accepted that there was an apparent logic in the case for floating support and providing targeted support to the older people who need it and not necessarily limiting this to those living in sheltered housing. However, King et al (2009) point out that by taking the support of a warden away from sheltered housing it fundamentally changes the nature of the service and undermines the specific reason why many people opt to move to that form of accommodation. The risks of removing support from sheltered housing are that it breaks the link between landlord and support provider thereby creating complexity in relationships, it reduces low-level preventative support, it ignores the other benefits older people report about sheltered housing in terms of feeling safe and secure as part of a community, and it underestimates the importance of the warden’s role in promoting harmony, facilitating social events and encouraging social interaction (King et al, 2009).

In 2009 Bristol City Council removed the resident wardens from its sheltered housing schemes for older people and in 2010 a survey to gauge reactions to this was organised by the Bristol Older People’s Forum (2010). 84 percent of respondents said they felt the service had got worse, 61 percent said they felt less safe and secure and 69 percent said they felt more lonely and isolated. There is an obvious risk of bias with the limited number of responses received, coming predominantly from older tenants with longer tenure who lived alone and possibly over representing the views of residents who felt they hadn’t been engaged in the process of change or wanted to make a complaint. But the study showed there was also a small minority who felt the service had been improved by wardens being removed.

The overall conclusion of King et al (2009) was that making changes to the role of the court/scheme manager is “complex and multi-faceted” (p84) with clear differences of position and opinion. As a consequence there is a need for statements in the study to assess the desirability of having a court manager as well as preferences for a resident or a part-time court manager service.

- #17 Feeling safe and secure**
- #10 Peace of mind that comes from being looked after**
- #14 Having security of tenure**
- #42 Checks on fire, electrical, gas, asbestos and water safety**

Several studies suggest that the essence of what older people, as residents of Retirement Housing and Extra Care, are seeking is to feel 'safe and secure' (e.g. Phillips et al, 2001; King et al, 2009; Boyle, 2010 and 2011; Oldman, 2014; Barrett et al, 2016; Fox et al, 2017), but there has not been as much research done to understand the features or facets of Retirement Housing and Extra Care that make residents feel safe and secure (Lindahl et al, 2018). Perceptions of safety and security are thought to be linked as much to the social as the physical environment and to go beyond conceptions of being in control (Towers, 2006; Koehn et al, 2016).

Giddens (1991) suggests that desires for safety and a sense of security emerge early in life and can be even more fundamental and powerful than the drive for physical comforts. Giddens (1984) also adopted and developed the concept of 'ontological security' that had initially been proposed by Laing (1965). Giddens (1984; 1990; 1991) saw 'ontological security' as the degree of confidence people had that they would be able to maintain their own self-identity within a suitable social and physical environment and is thus concerned with their physical, social and emotional well-being. The idea of 'ontological security' has been criticised for being "a fantasy of the academic" (Franklin, 1986) of which "sightings are rare" (Gurney, 1996) and despite supporting the concept Saunders (1989) admitted it was "difficult to define and even more difficult to operationalise". It is nevertheless serves as a helpful reminder that feeling safe and secure does ultimately depend upon a person's subjective assessment of their personal, social and physical circumstances and context. This is why it is helpful to have a statement that allows each participant to position the importance of feeling safe and secure relative to other factors and features.

Koehn et al (2016) saw 'control' as a key component of ontological security, just as Fine and Glendinning (2005) had argued that receiving care and support did not need to be "a unidirectional activity in which an active care-giver does something to a passive and dependent recipient" (p616). Hence statement #10 seeks to assess the extent to which residents feel that their 'ontological peace of mind' will be promoted or undermined by an environment in which they are being 'looked after'.

Saunders (1990) identified a person's home as playing an important part in achieving ontological security as it is where they "feel in control of their environment, free from surveillance, free to be themselves and at ease" (p361). He suggested though that home owners had more ontological security than renters (Saunders, 1984, p203) and prompted an ongoing debate about whether ontological security is dependent upon on housing status and tenure (e.g. Barlow and Duncan, 1988; Hiscock et al, 2001; Morris, 2009).

The United Nations recognises the right to adequate housing as a basic human right (United Nations, 2014), but the right is not just for a place of shelter it also provides for protection

against eviction and the right to security of tenure as “housing is not adequate if its occupants do not have a degree of security of tenure” (p4). Despite this housing is increasingly been seen as a crisis issue with clear fault lines between home-owners and renters (Reynolds, 2018) and a concern that older tenants risk being disadvantaged because rented housing is unaffordable, in poor condition and tenancies are inherently less stable (Baxter and Murphy, 2018). Although occupiers of rented housing, particularly social housing, appear to be accorded a lower status than owner-occupiers (Marcuse, 1975; Gurney, 1996; Ministry of Housing, Communities and Local Government, 2018) it is suggested that this lack of ontological security is not necessarily a consequence of tenure alone (Hiscok et al, 2001) and hence Barlow and Duncan (1988) warned against simply using tenure as a shorthand for disadvantage and deprivation. Means (1988) was concerned that “housing debates have a tendency towards superficiality towards older people” (p396) and despite seeing housing as a growing cause of inequality in older age felt this was more fundamental than merely being determined by matters of tenure. Concerns have been expressed that, despite steps to improve tenure security for tenants in the private sector through the removal of ‘no fault’ evictions (under Section 21 of the Housing Act 1988) social housing is shifting from providing permanent tenancies to becoming more of a temporary tenure with increased use of ‘probationary’ and ‘fixed term’ tenancies (Fitzpatrick and Pawson, 2014; Fitzpatrick and Watts, 2017).

Best and Martin (2019) however recognised that as ‘generation rent’ ages the numbers of people renting in older age are set to increase substantially and hence it is considered important to understanding the significance of tenure security for older people in Retirement Housing and Extra Care.

The physical safety of housing is something that has often been taken for granted and seen as a minimum compliance issue that should not even need to be questioned. There are clear statutory duties that providers must observe and guidance on the assessment of risks (Department for Communities and Local Government, 2006). The tragedy of the Grenfell Tower fire, however, has raised the profile of fire safety in particular and prompted a review of what measures and protections are expected to be adopted in specialised housing such as Retirement Housing and Extra Care (National Fire Chiefs Council, 2017). It is therefore relevant and also timely to consider the extent to which residents do or do not regard physical safety checks as a matter of priority.

**#48 Good staff who provide consistency of service**

**#51 Care staff on-site 24 hours 7 days a week if needed (EC)**

The reassurance of having 24 hour on-site care staff is a defining feature of Extra Care and is one of the mandatory requirements for a retirement community to be eligible for accreditation under the Associated Retirement Community Operators Consumer Code (ARCO, 2017, 3.1(d)).

Providers of personal care service in Extra Care settings in England are required to be registered with the Care Quality Commission and demonstrate that the care services they provide are safe, effective, caring, responsive and well-led. Care and support should also be

tailored to the person's individual needs and enable them to live as independently as possible in accommodation that is genuinely their own. To ensure that this is the case it is necessary to demonstrate that there is a real (as well as a legal) separation between the provision of care and accommodation.

Batty et al (2017) reported that a common theme for residents of Extra Care was the importance of having a good relationship and rapport with the care and support staff with their proximity, presence and consistency cited as key factors in creating close trusting relationships. A similar link between resident satisfaction in assisted living settings and the quality and consistency of their relationship with staff had been noted by Ball et al (2000) and by Gurnick and Hollis-Sawyer (2003). Sikorska-Simmons (2006, p590) also concluded that "greater resident satisfaction ... was associated with higher job satisfaction and more positive staff views of the organisational culture" confirming the findings of Schmit and Allscheid (1995) and Zabawa-Ford (2003) that more satisfied employees provide better quality services.

The National Audit Office (2018, p5) has recognised that demographic trends mean that demand for care will inevitably continue to increase and as a consequence the care workforce will need to grow yet many providers are already facing challenges in recruiting and retaining care staff. A survey of care workers by Unison (2018) found that 49% were considering leaving their job with the main reasons being low pay (73%), not feeling valued or respected (55%) and not having enough time to deliver good quality care (53%).

Dromey and Hochlaf (2018) found that the challenges of recruiting and retaining care workers were "inextricably linked to low pay and poor working conditions" (p3) and this was said to be a consequence of the under-funding of social care as well as a commissioning and delivery model based on cost rather than quality. Statistics from Skills for Care (2017) indicated that 56% of care workers in the home care sector (including care workers providing care in Extra Care settings) are employed on 'zero-hour contracts' and that for those care workers paid at the National Living Wage the turnover rate was almost 30% whereas for those paid at the 'Real Living Wage' turnover was under 18%. Poor employment practices also served to create a negative perception of care work which further impeded recruitment as it was seen as being more demanding and potentially unpleasant than other jobs with a similar rate of pay (Howat et al, 2015).

It is relevant to test how much residents share these perceptions of the importance of care staff being available 24 hours a day in Extra Care and the value of maintaining quality and consistency of workers.

## **#21 Pull-cord or pendant to summon help in an emergency**

The provision of social alarms to link individual residents to a responder has been a standard feature of sheltered housing almost since its inception in the 1960s. Initially these were "clumsy and primitive systems" (Parry and Thompson, 1993, p12) that simply provided the means to alert the on-site warden by use of "bells and buzzers activated by switches and push buttons" (Fisk, 2003, p55). By 1966 systems were being fitted in the majority of



sheltered schemes and it was noted that “the role of such systems is not just enabling older people to obtain help in an emergency but also in providing reassurance” (National Old People’s Welfare Council, 1966, p7)

The Ministry of Housing and Local Government Circular 82/69 specified that alarms should be provided in Category 2 sheltered housing schemes designed to be suitable for older people needing higher levels of support but remained optional for Category 1 schemes. Although some ‘bell and buzzer’ systems were still being installed in 1975 (Attenburrow, 1976, p3), by the 1970s voice systems were becoming “an integral part of the support network” (Butler et al, 1979, p106) notwithstanding some initial concerns that speech systems might be subject to abuse and change the nature of the residents’ relationship with the warden. It was suggested that as technologies have been introduced that meant the warden could be more readily contacted this had a subtle but significant effect in reducing propensity for mutual support and tenants taking responsibility for each other’s well-being (Fisk, 2003, pp64-65; Parry and Thompson, 1993, p13).

Butler (1981, p19) considered that a “rhetoric of dependency, degeneracy and crisis leads to the conviction that an alarm system is the appropriate response we as a society must make in order to protect our ageing members”, while Middleton (1982b, p29) thought the combined effect of an alarm system and warden “engendered a self-image of vulnerability that is neither necessary nor desirable”. Heneke (1985) suggests that seductive sales techniques are being used to justify expensive and antiquated call systems that older people no longer want or need. Butler et al (1983) found that 81% of residents of sheltered housing had used the alarm system just once or not at all in the past year and there were very few genuine emergency alarm calls.

Pemberton et al (1990) were critical of both the aesthetic and functional qualities of emergency call systems. Pull cords are seen as old fashioned as well as being problematic (Fisk, 2003) as they are easily confused with light switch cords in bathrooms and frequently rendered inaccessible by furniture (Butler, 1989, pp14-15). Fennell (1989, pp23-25) found that some 46% sheltered housing tenants admitted they had pull cords that they had either tied up or cut off thus confirming similar results from earlier studies (Middleton, 1982, p27; Birmingham City Council, 1986, p7). Although pendant devices have been suggested as an alternative it does not appear that they will entirely replace pull cords because many older people forget or choose not to wear them (Fisk, 2003, p66). The connectivity capabilities of the systems are also limited as they often depend on a single line with slow connection times to out of hours call centres (typically 90 seconds) such that the call experience can seem quite inferior to a normal telephone call.

Substantial investment will be required if providers are to maintain alarm systems in sheltered housing post 2025 when analogue telephone systems, on which most legacy alarm systems operate, are due to be switched over to digital (Appello, 2017; 2019). Barclay (2017) suggests that new digital devices not only provide substantially improved functionality and aesthetics they also open up a wider range of communication and support opportunities. The HAPPI 3 report (Housing our Ageing Population: Positive Ideas: Making Retirement Living a Positive Choice) (Best and Porteus, 2016, p32) recognised that the housing with care market

had been slow in becoming 'technology aware' but predicted that "a shift to digital technologies that will create new models of preventative care"

The conclusion of Porteus and Brownsell (2000) was that "the present technology of community alarms has proved successful but it suffers from a major limitation – the user must initiate a call for assistance" (p59) and hence there have been calls for a move towards passive monitoring where the user does not need to do anything for the call to be triggered (Robinson et al, 1995, p48). King (2004) also argued that there was a need to move on from the first generation of 'alarms and sensors' to second generation 'lifestyle monitoring' and third generation 'smart homes'. However, research by Brownsell et al, 2008 on the effectiveness of second generation telecare equipment (flood or fall detectors) and third generation lifestyle reassurance systems with sheltered housing residents found it made no discernible difference to their fear of falling or overall sense of confidence. A subsequent study by Matlabi et al (2011) was similarly inconclusive.

Park et al (2016) support the view of Lewin et al (2010) that access to a high-speed internet connection will become the norm for keeping in touch via mass-market devices such as smart phones and tablets rather than specific stand-alone alarm systems. Yet despite the limited evolution of alarm call systems since they were first introduced in the 1960s and 1970s, Reynolds and Beamish (2003) found that emergency call systems are still expected to feature as part of the service offer across the spectrum of age-segregated housing communities. It will therefore be relevant to see if the provision of a pull cord or pendant is (or is not) still seen as a priority by residents of Retirement Housing and Extra Care properties.

**#5 No need to worry about maintenance and repairs**

**#6 Repairs or problems are addressed and fixed quickly**

There is evidence to suggest that a major concern for older home owners is the cost and practicality of home maintenance (Age UK Enterprises, 2015) and older people find "securing a tradesperson they trust particularly worrisome" (Communities and Local Government Committee, 2018, p18). There are perils in living in a property that is poorly repaired, cold and expensive to run so it is said that an attraction of Retirement Housing and Extra Care must be that repairs and maintenance are taken care of (James and Saville-Smith, 2010).

Tucker et al (2014, p227) suggest that although "a considerable proportion of social housing provider's budgets are spent on repairing and maintaining existing stock ... there is a distinct lack of research focusing on the critical success factors of a successful repairs and maintenance service". The National Housing Federation (2011) reminds providers that repairs and maintenance services should have regard for customer satisfaction as well as value for money. Van Mossel and Jansen (2010) considered the maintenance preferences of social tenants in Holland and found that their emphasis was for critical services such as heating and security issues to be given higher priority. O'Reilly and Proverbs (2008) found that the factors that most influenced the level of tenant satisfaction with repairs were communication, reliability and the quality of the materials and workmanship.

It is considered to be important to not only assess the relative priority that residents of Retirement Housing and Extra Care give to repairs and maintenance services but also test whether there are differences in the relative significance of factors related to assurance (no need to worry) and speed (fixed quickly).

### **TOGETHERNESS (Community Compatibility)**

- #8      Companionship of neighbours so you are never lonely**
- #19     Social events and activities to get involved in**
- #23     Community spirit and friendship with people of similar age and outlook**
- #37     Living in close proximity to others in a compact community**

Townsend (1957) preceded Perlman and Peplau (Perlman and Peplau, 1981, 1982; Peplau and Pearlman, 1982) in making the distinction between social isolation and loneliness, seeing social isolation is an 'objective' assessment based on the number and extent of social contacts a person has, whereas loneliness is a 'subjective' assessment by an individual of unwelcome feelings of lack or loss of companionship. Some people can live solitary lives and yet not feel lonely, while others may experience loneliness despite having extensive social networks (Coyle and Dugan, 2012; Dickens et al, 2011).

Loneliness is seen as a particular hazard for older people (Beach and Bamford, 2014; Bolton, 2012; De Jong Gierveld et al, 2006; Victor et al, 2005; Wenger et al, 1996) and an aspect of later life that older adults fear (Sarkisian et al, 2001). Data suggests that 1.5 million older people in the United Kingdom do not see or speak to someone for at least six days of the week and 200,000 older people have not had a conversation with a friend or family member for over a month (EROSH, 2018). But, despite spending more time alone than younger adults, older people appear less susceptible to loneliness (Revenson and Johnson, 1984) and for some older people spending more time alone is a deliberate decision (Larson et al, 1982; Larson et al, 1985).

Numerous studies have sought to assess levels of loneliness amongst older people. Although results for the proportion of people aged over 65 in the United Kingdom who say they are often or seriously lonely vary between 5% and 16%, the median seems to be around 9% (Bond and Carstairs, 1982; Bowling and Farquhar, 1991; Fokkema et al, 2012; Hunt, 1978; Jones et al, 1985; Nicolaisen and Thorsen, 2014; Pikhartova et al, 2014; Qureshi and Walker, 1989; Scambler et al, 2002; Sheldon, 1948; Townsend, 1957; Townsend and Tunstall, 1968; Tunstall, 1966; Victor et al, 2005; Victor et al, 2006; Wenger, 1984). It is suggested that the recorded incidence of loneliness might be subject to change over time due to shifts in social patterns and generational perspectives but also as a consequence of an increased willingness by people to admit to feelings of loneliness that previously would have been suppressed (Victor et al, 2002; Griffin, 2010). Because loneliness is subjective and different people will respond differently in different circumstances it is difficult to measure with any degree of consistency, but there are thought to be direct links between demographic, behavioural and

social variables and loneliness (Wenger et al, 1996). Victor et al (2005) identified and categorised risk factors as being linked to:

- **Relationship Expectations** – loneliness due to a mismatch between the reality and our desired level and intensity of social relationships and the higher the expectations people have, the more likely that they will not be fulfilled (Dykstra, 2009).
- **Social Networks** – being unmarried, living alone and not having children are associated with higher rates of loneliness (Dahlberg and McKee, 2014; De Jong Gierveld and Tilburg, 2010; Dykstra, 2009; Fokkema et al, 2012; Nicolaisen and Thorsen, 2014)
- **Dispositional Factors** – poor self-esteem, low social skills and lack of financial resources (Cacioppo and Cacioppo, 2014; Hughes et al, 2004; Pikhartova et al, 2015; Pinquart and Sörensen, 2001) along with poor health (Cacioppo and Patrick, 2008; Lecovich et al, 2011) are connected to higher rates of loneliness.
- **Trigger Factors** – loneliness may be triggered by significant life events especially loss of a long term partner or marital/family conflict (Victor and Bowling, 2012; De Jong Gierveld and van Tilberg, 2010; Victor et al, 2006; Wenger and Burholt, 2004; Wenger et al, 1996).

Actions and measures to tackle loneliness are not necessarily effective, as illustrated by an evaluation of a well-being and befriending service that found that after six months some older people actually reported an increase in their sense of loneliness (Moore et al, 2015). Similarly there are mixed views and reports about the effectiveness of Retirement Housing and Extra Care in addressing loneliness of residents. Research carried out on behalf of the International Longevity Centre UK (Beach, 2015) surveying residents of extra care housing about their independence, loneliness and quality of life declared that residents had lower levels of loneliness than older people living in the wider community. Wood and Salter (2016) and Callaghan et al (2009) concluded that the vast majority of older people's social lives improved and their circle of friends increased after moving to Retirement Housing or Extra Care schemes. However, Bernard et al (2004) found that even though many residents declared they had benefited from a decrease in feelings of loneliness since moving to a retirement village, for others loneliness had increased. Despite Gray (2017) reporting that 28% of residents saying they had fewer friends than when they moved into retirement housing the study did not explore or explain why this might have occurred. Burholt and Williams (2007, p14) noted that whilst it has been claimed that sheltered housing is conducive to the formation of new friendships and a sense of community (Jerrome, 1981), other evidence suggests that some tenants feel lonelier after moving to sheltered housing (Field et al, 2002) or have fewer visitors and fractured social relationships (Walker et al, 1998).

Adams et al (2004) suggest that loneliness amongst people living in retirement communities might be associated with them "having a smaller social network, with grieving a loss and receiving fewer visitors" (p482) and Gray (2015) also considered that residents in retirement housing were likely to have poor health, have experienced widowhood, have low mobility and be living with limited means, which were all recognised as factors associated with a

higher incidence of loneliness in the older population. Percival (2001) also suggests that loneliness could be amplified by the relative calm and quiet of sheltered housing (p835).

Research to explain why older people living in the various forms of sheltered housing differ in their experience or susceptibility to loneliness, however, remains limited and more fine-grained analysis of the risk factors and influences has been called for (Bolton, 2012, p12). But it is clear that numerous factors “often in various combinations, shape an individual’s experience in relation to the nature of the social networks in which they live and the individual’s ability to build and sustain adequate social networks” (Griffiths, 2017, p10).

Bailey (1971) recognised that there are particular challenges of negotiating reputation and relationships in small communities, but Biggs et al (1999) and Bernard et al (2004) suggested that the closeness of the community may in fact be a positive factor noting that there appeared to be a greater propensity to peer support in smaller more tightknit retirement communities than in larger retirement villages.

Gray and Worlledge (2018, p617) indicated that they considered that all forms of sheltered housing should ensure that they were “supportive of neighbour interactions and collective social activities”. Several studies have endorsed the positive role that organised group activities can play in developing a sense of community in Extra Care housing (Callaghan, 2008; Callaghan et al, 2008; Croucher et al, 2006), but other studies have questioned whether supportive social contacts are genuinely formed through organised events and activities (Rowe and Kahn, 1997; Ritchey et al, 2001; Litwin and Shiovitz-Ezra, 2006; 2010). Although Adams et al, (2011) argued that informal social contacts were more important to well-being than formal group activities, they agreed with the assessment of Litwin and Shiovitz-Ezra (2010) that group activities could be effective in generating friendships. Hence, although Gray (2017, p189) considered group participation to be “the lowest step on the social capital development ladder”, Gray and Worlledge (2018, p628) felt that opportunities to meet others were a necessary but not sufficient condition for developing helpful and satisfying social relationships.

Gray (2015) suggested that having enough ‘younger old’ residents was an important consideration in ensuring there were adequate numbers of people able and willing to participate and support groups activities, but Zaff and Devlin (1998) argued that it was the manager of the sheltered housing who played a crucial role in generating and sustaining social activities. Attitudes to social activities may thus also be linked to and have an influence on residents’ attitudes and preferences for a Court Manager as considered in Statements #1, #2 and #3.

Miller (2016) proposed three conceptions of the merits and influences on the attitudes to leisure activities of residents in care settings. First was as ‘a Structure for Living’ providing a way to keep busy and engaged, but potentially also risking creating an institutional impression especially if based on stereotypically associated with older people such as bingo. Second was for ‘Facilitating Social Connections’ seeing leisure as a mechanism for social interaction and creating the contacts required for friendships to develop, but potentially risking creating a pressure to participate that impinges upon the scope for individual autonomy. Third was to ‘Maintain Ability’ with leisure being used as a mechanism to keep people physically and mentally active.

These conceptions demonstrate the challenges of trying to provide 'something for everyone' when Retirement Housing and Extra Care residents have a range of different levels of need and interest. Women are said to be more sociable than men (Antonucci et al, 1998; Antonucci, 1994; Eagly, 1987) and hence much of the social milieu of sheltered housing is female focused (Thewilis, 2001; Davidson et al, 2003). Bingo, however, is an activity that has become to be associated with negative age and gender stereotypes of "little old ladies ... who lack the cultural sophistication to enjoy other forms of entertainment" (O'Brien Cousins and Witcher, 2004, p128). Milligan (2014, p70) noted that men often find it "harder ... to make friends in later life and are less likely to join community based social groups that tend to be dominated by women" and hence advocated alternative mechanisms for engaging older men such as 'men's sheds' initiatives (Ballinger et al, 2009).

Rather than focusing on the strong ties that form between established friends that take time to establish and tend to connect only relatively homogeneous groups of people, Granovetter (1983) explored the potential benefits from "weak links" with acquaintances that can connect a wider range of social groups within a community so people know and are positively disposed to one another despite differences in their character and circumstances. But Rosenblum (2016, p40) was clear that "neighbour relations are not weak friendships", confirming the views of Young and Willmott (1957) that neighbours are neither enemies nor friends.

Wallace and Thurman (2018) found that older people are more likely to both experience and reciprocate acts of kindness and Anderson et al (2015) considered that reciprocal relationships could have a significant positive impact on the quality of lives. Ferguson (2017) suggested that "low level interactions ... a chat with a known member of staff ... a greeting from a neighbour ... can make a difference to the quality of life for people who might otherwise be isolated and/or lonely" (p18), but also recognised that there are risks "in engaging with others and asking for or giving help in relationships ... of getting involved in difficult situations, of being asked to give too much, of being seen as needy or even of being rebuffed" (p25). Even when people live in a comparatively homogeneous environments, as is the case with Retirement Housing or Extra Care settings, tensions can still arise in negotiating the terms of reciprocity and striking a balance between minding one's own business and being sufficiently neighbourly. In trying to judge what constitutes the right level of give and take Silver (1989) quotes Adam Smith (1776) and his remark that there were a "thousand exceptions" to the loose rules that govern personal exchanges and it is the ambiguity of relationships between neighbours that make them inherently precarious.

Neighbourliness depends upon location as well as reciprocity, hence physical proximity is an essential factor and why neighbour relationships do not exist on-line. Closeness to neighbours can mean we get too close and hence "consume too much gossip and the 'old musty cheese' of one another" (Thoreau, 2008, p95) or alternatively "cannot escape the petty despotism" of our neighbours (Cather, 1990). Hence the Robert Frost poem 'Mending Wall' (Frost, 1914) emphasises the importance of creating boundaries with the expression "good fences make good neighbours" and talks of setting the wall between them without necessarily being clear about whether they walling themselves in or their neighbour out. The assessment of Pretty (1990) was thus that having control over your own space and clear

boundaries helped avoid disagreements and hence could encourage a sense of community to develop whereas a lack of defensible space was likely to lead to conflicts and dysfunctional behaviour.

Pretty (1990) suggested that one must feel a sense of belonging and emotional safety for a sense of community to develop. It was also the assessment of Gilleard et al (2007) that whilst a lack of defensible space could lead to conflict and dysfunctional behaviour, with greater defensible space disagreement reduced and hence greater sense of community could occur. Dunbar (1996, p18) considered that living in groups inevitably created tensions as well as benefits and was subject to a perpetual balancing act between 'centripetal forces' driven by the fear of predation that cause the feelings of sociability that make us want to band together and 'centrifugal forces' that make us seek the safety of our own company. Yamasaki and Sharf (2011) thus suggested that the process of becoming settled in a retirement community involved a combination of both 'opting out' as well as 'fitting in'. Evans and Means (2007, p51) had also concluded that the "success of retirement communities depended upon grasping the subtleties of both communities of interest and communities of place", so rather than aiming to create a particular idealised community, they suggested it was better to have one that is lively, diverse and dynamic.

Issues of loneliness, community, companionship, sociability and close proximity are all worth considering to assess whether these are universally important or only a priority for certain people and of less or no interest to others.

**#32 Some other residents behave badly**

**#33 Residents who take control and assume responsibility for organising things**

**#34 People don't respect privacy or confidentiality**

**#35 Gossip spreads quickly**

Retirement Housing and Extra Care schemes are not simply buildings and places, they are the spaces in which people, for good or bad, conduct their lives. People do not necessarily start behaving well or become nice and respectful to one another simply because they become old and as the poem 'Warning' by Jenny Joseph (Joseph, 1992) suggests quite the opposite can occur. Airey (2003, p136) even suggests that people may actively construct social problems and present these as being perpetrated by specific groups or individuals within their neighbourhood in order to protect their own sense of well-being and avoid portraying themselves as passive victims of their social circumstances.

As Percival (2001, p836) reports, intolerance is not uncommon in age-segregated housing settings and Ewan et al (2019) confirmed that cliques do frequently form in retirement communities. A report from the Associated Press (Daily Mail On-Line, 2018) indicated how this can spill over into bullying and domineering behaviour when some residents assume they have power over others. Bailey (1971) also suggests that negotiating social cliques, understanding the unwritten 'rules of engagement' and maintaining one's own reputation is particularly difficult in small communities such as encountered in sheltered housing where interactions occur on multiple levels as tenants, neighbours, co-users of communal facilities, attendees at scheme functions etc.

Privacy can also be difficult to protect and likely to come under threat due to the close proximity of residents in Retirement Housing and Extra Care settings. Several studies have confirmed the importance of privacy for residents in housing and care settings (e.g. Bland, 1999; Graham and Tuffin, 2004; Bekhet et al, 2009; Bohle et al, 2014). Privacy depends upon an individual having the ability to maintain control of access to themselves and information about them (Childress, 1982; Beauchamp and Childress, 1989) this requires them to have some defensible space apart from the community (Netten, 1993). Within the privacy of their own home residents should be able to control the care they need and maintain personal boundaries (Willcocks et al, 1987), but that will be undermined if the integrity of that privacy is breached by staff using master keys or entering properties without invitation, failing to show respect not seeking consent for care and by passing private information on to other residents (Lidz et al, 1992). The assessment of Barnes (2002) was that if residential care setting offered more protection of privacy when this was desired this might have the effect of making social interaction more appealing because one would not compromise the other.

The social lives of humans are dominated by “the intense interest we show in each other’s doings” (Dunbar, 1996, p9) and Grotjahn (1986, p357) suggests people simply cannot help being fascinated by the “peculiar conglomerate of rumour, gossip, observation, voyeurism and speculation, connected with the feeling of superiority”. It should not therefore be a surprise that in an environment such as sheltered housing, characterised by expectations of social contact, that Percival (2000) found that opportunities for gossip were intensified while Gamliel and Hazan (2006, p363) saw gossip as an important element of the social world of old age homes and sheltered housing.

Gossip involves the exchange of personal information about absent third parties and although this can be either positive or negative in character it is most often associated with unfavourable assessments and widely considered to be a bad thing (Foster, 2004; Ender and Enke, 1991). Even though an estimated two-thirds of conversation time is devoted to social topics of “personal relationships, personal likes and dislikes, personal experiences and the behaviour of other people”, it is thought that less than 4% of this is malicious (Emler, 1994; Dunbar, 1996, p123; Dunbar et al, 1997). Although gossip transgresses the privacy that residents value, many anthropologists and commentators still regard gossip as playing a useful social function.

Gluckman (1963) saw gossip as a ‘unifying force’ that amplified the merits of certain values and conventions and sanctioned members of the community who did not conform. Gossip can thus be seen as an indirect but effective policing mechanism and protection against exploitative behaviour due to fear of ostracism from the group for those found to have transgressed (Herskovits, 1937; Almirol, 1981; Wilson et al, 2000; Beersma and Van Kleef, 2011; Feinberg et al, 2012, Feinberg et al, 2014). Paine (1967) though challenges the assessment of gossip as a force for social cohesion and reaffirmation of shared values, suggesting it is individuals rather than groups that gossip and hence suggests that gossip should primarily be regarded as a form of self-seeking behaviour.



Because gossip reveals information about the views of the gossip and indicates that they consider the listener can be trusted Baumeister et al, (2004, p112) suggest this can “help cement and maintain social bonds”. But Baumeister et al (2001), Dunbar (2004) and Bosson et al (2006) contradict studies that emphasise the importance of socially desirable behaviour to create a positive impression (e.g. Folkes and Sears, 1977; Backman, 1990; Stevens and Kristof, 1995) by showing that negative gossip is more potent in creating strong social ties. Unfortunately the consequence of this can be to create more division and factions within a community (Foster, 2004; Wert and Salovey, 2004).

It is suggested that women are more social than men (Eagly, 1987; Antonucci et al, 1998; Antonucci, 1994; Vaux, 1985) and may be inclined to be more self-disclosing in their relationships (Cutrona, 1996; Duck, 1990). But this may not necessarily have a positive effect on their well-being (Troll (1988); Turner (1982) especially if they are thereby rendered more susceptible to gossip (Tebbutt, 1995).

The statement gossip spreads quickly is expressed to be intentionally non-judgemental to allow residents themselves to determine whether the prevalence of gossip in Retirement Housing and Extra Care is considered to be prejudicial or positive. It is important, however, to assess whether and the extent to which these consequences of living in Retirement Housing or Extra Care are considered to be a serious detriment or merely a tolerable inconvenience.

**#11 Living around people of a similar age and outlook**

**#12 Occupancy restricted to only retired people aged over 65**

Since the 1970s it is thought that society has generally been becoming more segregated (Dorling et al, 2008) and suggested that this separation has become particularly prevalent and pronounced with regard to age (Kingman, 2016). Older people are now less likely to live in the same family with their adult children (Corlett and Judge, 2017) and the Social Integration Commission (2014) suggest that on average people in Britain have 42% fewer interactions with people of different ages than would be expected if there was no segregation. Whereas most forms of division in society (e.g. by gender, sexuality, religion, race or wealth) are widely condemned (Kingsman, 2016, p6), there appears to be a greater willingness to accept segregation based on age as being more benign and potentially even beneficial (Winkler and Klass, 2012).

Burke (2017) refers to the separation of older people into age based housing as tantamount to “age apartheid” (p5) while Kuhn (1977) called age specific housing schemes “glorified playpens for older people” (p107). Others are ideologically opposed to the principle of age segregation because they regard intergenerational integration and diversity as a defining characteristic for a healthy community and civilised society (Riley and Riley, 2000; Uhlenberg and Gierveld, 2004; Vanderbeck, 2007; Evans, 2009). It is claimed that there are adverse economic consequences of age segregation because mutual support across generations is lost and has to be replaced by paid care, as well as negative social and political implications, because of the lack of trust and competition amongst generations for recognition and support (Kingsman, 2016). Means (1987) advocated a more critical approach to studies of

sheltered housing that recognised that it is not the norm and accommodates only around 5% of the elderly population. Wheeler (1986) was concerned that the justifications for age specific housing were not necessarily due only to age but were a symptom of a more general deprivation in housing provision.

A particular appeal of age segregation is to provide protection against crime, but as is the case with 'gated communities' (Low, 2001; Blandy et al, 2005, Vallety, 2007) perceptions are seldom supported by facts (Brown, 1995). Age segregation is also said to provide agglomeration benefits but, as in the case of age-segregated prisons (Wangmo et al, 2017), there is a risk that these are often over stated.

By removing older people from the mainstream housing into 'safe havens' isolated from the rest of society, age segregated housing could be considered to be potentially ageist in character (Victor, 1987, p13; Hagestad and Uhlenberg, 2005; Croucher et al 2006; Petersen and Warburton, 2012). Even though age discrimination has been shown to diminish as people age (Rupp et al, 2005), as well as older adults having a more positive regard for age and ageing (Chasteen et al, 2002; Laditka et al, 2004), it is suggested that age segregated housing might be a source of intra-generational ageism (Kite and Wagner, 2002; Gamliel, 2000; Gamliel and Hazan, 2006; Bodner, 2009; Bodner et al, 2011). This occurs where a groups identity is defined by reference to old age and some members show negative attitudes or perceptions of the age of others despite being of a similar age.

Golant (1980; 1985) suggests that the people most likely to seek out age segregated housing are either those who relate most strongly and hence want to be associated with others of a similar age, or those who tend to judge themselves by comparison with others so want to move to age specific housing to avoid unfavourable comparisons with younger fitter and more active people. Social Identity Theory (Tajfel, 1981) suggests that older residents of age-segregated housing schemes may form group identities based on perceptions of age that not only separate themselves from younger age groups but may also distance themselves from older people who are no longer seen as versions of themselves due to mental or physical decline or disability (Butler, 1975, p2009; Gamliel and Hazan, 2006). Terror Management Theory (Greenberg et al, 1997) suggests that being surrounded by people of similar age can act as a form of 'shock absorber' against the sense of decline associated with the ageing process (Gamliel, 2000, p252; Ritter, 1988; Thompson, 1992). Percival (2001, p833) considered that "personal resolve and self-evaluation may be strengthened in the age segregated environment" because of the "opportunity for favourable contacts and comparisons with other older people", but Golant (1999) was concerned that self-identity and emotional well-being of residents might be diminished by unnaturally limiting their reference group to people often more frail than themselves. Gubrium (1972; 1993) however pointed out that it was wrong to assume that the social interactions of older people living in age segregated settings were necessarily confined to that environment.

Roscow (1967) and Lawton and Simon (1968) found that the likelihood of friendship among older people increased with physical proximity and hence Keith (1977), Jerome (1981), Adams (1985) and Golant (1985) all argued that greater opportunities for social interaction was a major advantage of age segregated housing schemes. These claims, however, have

been challenged as the evidence regarding the relative social benefits of age segregated or age integrated housing for older people remains inconclusive when the myriad of personal and environmental variables are taken into account (Gans, 1972; Teaf et al, 1978; Jonas, 1979). It is recognised that age segregated housing may not be what all older people want (Clough et al, 2004), but in reality only a small percentage of older people live in age segregated housing so for those that do live in Retirement Housing and Extra Care it is appropriate to consider whether they regard it to be a positive or negative feature. Opinions for or against age segregation of housing for older people have also been found to operate at a micro (subjective) level as well as on a meso (institutional) and macro (ideological) basis (Hagestad and Dannefer, 2001; Lennox et al, 2008; Silverstein and Giarrusso, 2011).

The age at which a person may be considered to be an older person in order to be eligible for residence in Retirement Housing and Extra Care is often set at 55, whereas the age at which the state pension is payable in the United Kingdom was previously 60 for women and 65 for men but is now increasing to 67 for both men and women and is likely to be subject to further increases. In 2017 the World Health Organisation set 65 as the starting age for its classification of older age. Bernard et al (2004) considered that having a wide age range (potentially 55 to over 90) within a retirement village community could increase the complexity of co-existence and create tensions between different generational groups. It is therefore considered relevant to try to gain the perspective of residents on whether the entry age for occupancy should be raised and restricted only to those people who are over retirement age.

### **#13 Residents are able to have dogs, cats or other pets**

Having pets is a common cultural phenomenon and, even though the incidence of pet ownership does decline with age, it is estimated over a quarter of all people over retirement age has a pet (McNicholas, 2008). Despite this, it is suggested that the importance and significance of an older person's relationship with their pet is too often ignored or dismissed when considering the provision of residential care homes and sheltered housing, with many providers restricting or preventing residents from keeping pets (McNicholas, 2008, p2). Reasons for refusing to allow residents to have pets are often due to health and safety concerns linked to the potential transmission of disease as well as hygiene and allergy risks and concerns about noise, aggression and nuisance to other residents. It is suggested that these fears are groundless or considerably over exaggerated and could be easily addressed by pet owners agreeing to abide by a few simple commitments (Platt-Mills, 2002). Nigel Waterson MP considered it wrong that in a civilised society some 38,000 healthy animals were being put down every year and a further 10,000 given up for rehoming simply because their owner is moving to sheltered housing or a care home that did not permit pets. In 2010 he introduced the Care Homes and Sheltered Accommodation (Domestic Pets) Bill as Private Members Bill in an attempt to legislate to ensure that older people could keep their pets when having to move to a care home or sheltered housing. This would have created a legal presumption that pets should be permitted in care homes and sheltered housing provided they did not cause a nuisance to other residents. But without government backing this did not become law.

It is paradoxical that many of the care homes that refuse to permit residents to keep pets do nevertheless invite people to bring animals into the home under 'pets as therapy' schemes on the assumption that these can play a part in improving the health and psychological well-being of residents (McNicholas et al, 1993; Banks and Banks, 2005). There are many claims regarding the 'pet effect' on health. Friedmann et al (1980) linked pet ownership to greater incidence of heart attack survival and Allen (2003) suggested that stroking dogs and cats, or even watching fish swimming around in an aquarium, was capable of easing stress and reducing blood pressure. But other studies have found no indication that pet ownership or companionship had any significant impact in terms of reduced blood pressure in old age (Wright et al, 2007). It is suggested that in the quest to find a positive relationship between pet ownership and health, other factors and circumstances are given insufficient consideration (Rozin, 2006). The assessment of Herzog (2011) was that research remains inconclusive and pet ownership may even have a slight negative impact on a person's overall health due to a higher incidence of falls or risks from animal transmitted disease and parasites.

It is nevertheless claimed that pet ownership can provide emotional and companionship benefits that lead to an overall a sense of feeling needed and loved (McNicholas and Murray, 2005). Ashcroft (2017) suggests that pet owning residents of retirement housing rely on their pets for company more than friends, family or neighbours and that over a third of them think that having a pet also boosts their chances of meeting new people. There is evidence that people who live alone or socially isolated are more likely to succumb to anthropomorphic tendencies of ascribing human qualities and forming emotional relationships with animals (Paul et al, 2014; Letheren et al, 2016). It is in fact relatively common to give pets names, talk to them, take their photos and mourn them when they die (Serpell, 1996). There are though differences in the degree to which some pet owners go in attributing emotional desires and understanding too them (Fidler et al, 1996; Kiesler et al, 2006; Morris et al, 2008) and the extent to which they become emotionally attached and seek human-like supportive relationships with them (e.g. Bonas et al, 2000; Paul, 2000; Gilbey et al, 2007; Kurdek, 2009). Taken too far anthropomorphism can become problematic (Wynne, 2004) and the loss of a pet can become the cause of distress and depression on a par with bereavement of a human partner (McNicholas and Collis, 1995). Herzog (2010), however, has called into question the extent to which pets do contribute to psychological well-being, citing a study where lonely people got pets and their loneliness initially diminished but it was found that after 6 months they were just as lonely again as they were before (Gilbey et al, 2007). Another study found that those people who identified as being highly dependent upon their pet dog tended to be more lonely and depressed than people who were not so attached to their animals (Miltiades and Shearer, 2011).

The merits and consequences of pet ownership and whether this should be encouraged or eliminated in Extra Care or Retirement Housing settings remains a contested and controversial issue and hence its inclusion within the set of statements in this study.

## **AUTONOMY (Choice and Control)**

### **#26 Being seen as a form of care home**

### **#31 Residents are treated with dignity and respect**

In Britain, residential care homes have been and continue to be seen as a provision of last resort (Means and Smith, 1984; Oldman and Quilgars, 1999; Scourfield, 2007). Despite attempts to move away from local authority provision, create more domestic care settings and improve quality assurance these measures have not significantly altered the negative public perceptions of residential care (Peace et al, 1997). Townsend's (1962) study of residential care 'The Last Refuge' still influences how residential care is seen, as a place of dependency (Townsend, 1981) where people lose their identity, self-esteem and independence and are portrayed as passive victims sitting around doing nothing (Victor, 1994).

Burstow et al (2014), despite forming a commission to restore the reputation of residential care, were forced to admit that residential care homes are seen as "islands of misery" (p10) that are "unloved and even feared" (p9). Their proposed solution was to rebrand residential care as part of a spectrum of housing options to be "referred to as housing with care" in order to overcome and avoid the "negative perceptions associated with the term 'residential care'" (Burstow et al, 2014, p19). Anchor Trust had previously sought to use the label 'Housing with Care' to describe its residential care provision (Oldman et al, 1998) and Howe et al (2013) had warned that the variety of terms used to refer to different housing options with varying degrees and means of providing care and support was confusing and risked the entire sector becoming aligned with care homes. Higgins (1989) suggested that sheltered housing was part of a spectrum of provision that included residential care homes so were not immune from the same institutional characterisation.

Hazan (1994) proposed two axes to analyse housing and care provision for older people. The first axis representing a continuum from age integrated provision to age segregated provision and the second axis as a continuum from humanization (with older people seen as complete people with independence) to dehumanization (where older people lack individual identity). Care homes are seen as being institutions of 'segregation and dehumanisation' (Gamliel, 2000, p253) so fitting Goffman's (1961) definition of a "total institution". There are those that question the extent to which sheltered housing can be considered humanizing in order to avoid the stigma associated with care homes (e.g. McCafferty, 1994; Morris, 1993; Dobbs et al, 2008). However, as Means (1997) points out, even though people living in sheltered housing may not have the same associations and experience that they had with their previous home, they are nevertheless able to establish a sense of self-identity which is what older people most want to retain.

The stigma that is attached to care homes is a function of the perception of them as institutional settings (Hrybyk et al, 2012) and a negative reaction to them may come from the fear of residents of Retirement Housing or Extra Care that the same perceptions of living in a dehumanizing setting may also be applied to them. Hirst et al (1995) suggest it is because people living in sheltered housing may have moved there in order to avoid becoming institutionalised that they have particularly negative attitudes towards care and nursing homes.

It is appropriate therefore to test the prevalence and extent of the relative negativity associated with Retirement Housing and Extra Care being seen as a form of care home.

Calnan et al (2006) suggest being treated with dignity and respect can be a key factor in maintaining a sense of identity and hence avoiding dehumanization. Despite these terms being in common use they are difficult to pin down and Macklin (2003) said that the term dignity is 'at best superfluous and at worst deceiving'. Williams et al (2015) suggest that the essence of dignity in care is about focusing on 'the little things' that show a person that they are 'cared about' and not just being 'cared for' (p788). Calnan et al (2006) found "strong evidence that dignity was salient to the concerns of older people" (p363) particularly seeing an absence of dignity as a threat to their privacy, autonomy and identity (p373).

Self-respect was also seen as pre-condition for dignity as "when they lose self-respect ... then they are less likely to be shown respect by others" (Calnan et al, 2006, p364). Respect, however, is not something that can be simply be demanded or imposed and hence Harris (2007) was critical of the Labour Government's 'Respect Agenda' and formation of a Respect Task Force describing it as "a partial, clumsy and heavy handed policy" (p40) and considered that respect is far better addressed through the normal and informal social networks and relationships that are formed in communities and neighbourhoods.

The importance of being treated with dignity and respect may thus provide an indication of the extent to which residents consider this is important to their sense of identity and status.

- #27 Freedom to live as you choose: no requirement to join in or conform**
- #28 Independent living**
- #29 Able to have your say and raise matters with senior management**
- #30 Residents are engaged and able to exercise choice and control**
- #43 Everyone is kept informed and up to date about local plans and activities**
- #44 Information about costs and charges is correct, clear and comprehensive**

In a survey of some 2,000 residents of Anchor Trust's sheltered housing properties 38% said the biggest fear about growing older was losing independence or control over their lives (Belcher (1996). Similarly Westlake and Pearson, (1995, p8) found that maximising independence was an "overwhelming concern" for older people and Burholt and Williams (2007) found, in a survey of older people living in rural North Wales, that independence and being able to retain control over their lives was important to 87% of participants and of these 77% felt that independence could be maintained in sheltered housing.

Abbott and Fisk (1997, p8) argue that independence is "not solely concerned with or determined by an individual's ability to undertake day-to-day living tasks". Clark et al (1998, p60) suggested that individuals redefined "their boundaries of what comprised independence in line with their changing capacities and other circumstances" while Tinker et al (2000, p90) thought the oldest old (i.e. people aged over 85) viewed independence as "an enduring personal quality rather than an attribute which depends upon their physical, emotional or social state".

Although self-determination for older people living in sheltered housing can be problematic due to pressure to act to please others, feelings of being dependent and not being valued (Agich, 2003), self-determination is positively associated with quality of life (Hellström and Sarvimäki, 2007). Self-determination is conceived as having the powers of choice and control, but also extends to liberty of thought, freedom of expression, absence of coercion, lack of constraints on action and scope for self-determination (Dworkin, 1988). Fine and Glendinning (2005) do not consider that needing care should necessarily be a cause of dependency and Callaghan and Towers (2014) suggest there may be greater scope to exercise control over care provision in an Extra Care setting than in ordinary housing. There are though often pressures to participate in social activities and Percival (1996, p832) was clear that “the sheltered housing setting, with its notice boards, scheme newsletter, large communal lounge room and residential warden, raises social expectations” (Percival, 1996; 2001, p832).

Park et al (2016) thought that housing for older people schemes were accompanied by too many top-down management rules, which despite being introduced with the best of intentions still erode the independence of residents. Stevens (2013, p4) was also critical of the “paternalistic ethos” he felt was typical of many sheltered housing schemes that gave residents too little say. The challenge of ensuring that housing for older people “offers freedom, choice and flexibility” and allows older people to “make decisions” were amongst the principles advocated by the ‘Breaking the Mould: Revisioning of Older People’s Housing’ report from the National Housing Federation (Boyle, 2010). Despite a commitment made on behalf of Hanover Housing Association to ensure “residents remain in control of their lives, with the power to determine how their properties should be run” (Best and Moore, 2009), Moore (2010, p11) concluded that “in the case of provision for older people, the propensity to decide what is in their best interests is rife, because it is often bound up with well-intentioned but inherently ageist assumptions and attitudes”. The ‘professional knows best’ perspective, however still persists and Taylor and Donnelly (2006) remained adamant that decisions about where older people live and how they should be cared for should be based explicitly on the assessments of professionals.

Higgs et al (2003) and Grewal et al (2006) both used Maslow’s (1943) ‘Hierarchy of Needs’ model as a basis for conceptualising quality of life in older age as based on levels starting with control as the most basic requirement and ascending up to ‘pleasure’ and ‘enjoyment’. There are advocates for co-housing (e.g. Brenton, 2001; 2017) that would do away with what are seen as “ageist and disempowering services and service frameworks” (Fisk, 1999, p38) and put management control directly in the hands of residents themselves (Mullins and Stevens, 2016). Perkins et al (2012), however, suggest the desire older people have is for control over their own personal space, care and identity and they are not therefore interested in taking over the entire management of the scheme. This perspective is also supported by Free (1995, p37) as well as by Reynolds and Beamish (2003) who found that residents were often relieved to relinquish the stress and burdens of responsibility for management and by so doing gained self-confidence and competence to maintain power over the things that mattered to them most.

Although the extent to which residents of Retirement Housing and Extra Care want to make choices and participate in decision making may vary between individuals and over time, it is clear that to do so they need access to information (Tinker et al, 1994). Fennell (1987) found that despite the associations involved in the study aiming to have a high level of management visibility with tenants, only 29% knew the name of their housing officer (the manager of the warden) and satisfaction with general management was lower than with the warden service or the overall level of satisfaction.

The priority and positioning given to these statements may help to indicate not only the relative importance of various aspects of personal freedom, independence, influence on management and ability to exercise choice and control but also the nature and extent of the autonomy that residents desire and how this might be achieved.

### **#36 Residents with dementia or who need to be looked after**

Barrett et al (2016, p6) found that “estimates of the prevalence of dementia among housing with care residents vary significantly and studies show considerable variation among schemes”. Brooker et al (2009) assessed the percentage of residents having dementia to be in the range 5%-9% for larger retirement villages and 23%-47% in medium sized extra care schemes. Darton et al (2012) found that the proportion of residents in extra care schemes with cognitive impairment ranged from 24% to 61%. The Housing and Dementia Research Consortium (HDRC) estimated that 20% of the residents in the housing and care properties of its member organisations are living with dementia (Barrett, 2012), while the Alzheimer’s Society’s Dementia Update Report 2014 estimated dementia prevalence among residents of extra care housing at a very precise 8.1% (Prince et al, 2014).

Fennell (1986, p75) noted the prevalence of “segregationist impulses” of sheltered housing tenants towards others who were more disabled and needing care. Percival (2001, p837) observed that “intolerance could be levelled at those tenants who were more frail or dependent” combined with a tendency to seek to exclude “tenants who lacked sufficient independence, and had care needs” with a perception that “people were not suitable if their ill health or disability offended fellow tenants”. McGrail et al (2001, p155-156) also found there was a “tendency to exclude others whose presence could undermine self-esteem” with a view that “tenants with dementia were particularly unsuitable for sheltered housing”. Alemán (2001) saw such complaints as being a part of a ritual of residents expressing themselves to be more competent and independent than others they considered not fit to live in the same establishment because of their debilitating health or mental capacities. By making disapproving comments regarding other residents they were both asserting their independence credentials whilst exorcising their fears that someday they could also be like those other residents. But Hummert (1994) considered that complaints of this nature might also inadvertently be helping to perpetuate negative ideologies of ageing.

Cameron et al (2019) reported on a “changing mix of residents”, but West et al (2017) saw this as simply part of a general transition between the ‘third age’ of independence, autonomy and active healthy aging and the ‘fourth age’ of dependence, frailty and geriatric treatments as described by Gillear and Higgs (2010). West et al (2017) suggest ambivalent accounts



and complaints about life in Extra Care settings are therefore examples of how residents are negotiating (or not) changes of status from independence to dependence.

Perhaps the fundamental issue, as identified by Gamliel (2000, pp258-259), is that “sheltered housing ... is accessible to several target population groups that have different goals” within which the two main sub-groups are “tenants who function independently and those who need intensive and continual support”. The study asks for residents to express a view on the preference or priority for “residents with dementia or who need to be looked after” to gauge the basis for different responses to this statement.

## **ACCESSIBILITY**

**#45 Wide doors, that are easy to open, for people with reduced mobility**

**#46 A reliable lift**

**#47 A suitable storage area for buggies and other large items**

**#54 An accessible bath for those that want or need it (EC)**

Provan et al (2016) estimate that there are some 1.8 million households in the United Kingdom who require accessible housing of whom 1.2 million are older people with approximately a sixth of this requirement for accessible housing not being met. Park et al (2016, p23) similarly conclude, based on evidence from Habinteg and the Papworth Trust (2016), that there is a significant shortage of accessible homes. The APPG on Ageing and Older People (2019) recognised that a significant proportion of sheltered schemes, built in the 1960s 1970s and 1980s also have poor accessibility.

Three aspects of accessibility picked out for consideration in the statements used for the research study concerned the desirability of wide doors that are easy to open, the need for reliable lifts and the value of having sufficient storage space for buggies and other large items. For Extra Care an additional statement was therefore included to ask about the provision of an accessible bath.

The Audit Commission (2008), commenting on the remodelling of existing sheltered and extra care housing (Tinker et al, 2007; Tinker et al, 2008), found a particular challenge was the requirement to have “heavy fire doors to flats that meant some tenants had difficulty in getting in and out and so either never left their flat or left the door permanently open”. The Wel-Hops Project (2007, recommendation 2f) also recommended that steps should be taken to “make sure opening the entrance door to the building does not require excessive force”. Fennell (1987) had considered the difficulties reported about getting into and out of buildings and moving around within them, but despite concerns about heavy fire doors frequently being mentioned by wardens, who have to negotiate them as the move around the building, only 8% of residents indicated they were a problem.

The Wel-Hops Project (2007, recommendation 7k) specified that all floors of a building should be just as accessible as the ground floor level and so insisted that a lift should be installed in all multi-floor buildings. Clapham and Munto (1990) however recognised the need to balance cost and convenience and so suggested that a lift was only required in buildings with more than a ground and a first floor level.

Robert-Hughes (2011) recognised that “although older people generally require less space, they still want sufficient space to hold onto the things they value [and] they may also need storage space for a wheelchair or mobility vehicle”. The Wel-Hops Project (2007, recommendations 9e and 9f) said provision should be made “for the parking of electric mobility scooters/wheelchairs” as well as a suitable “system for recharging their batteries”.

Although baths were a common feature in early sheltered housing properties most have now been replaced with showers so attitudes towards this shift are at least in part being tested and addressed by statement #41 that asks for views on the importance of the provision of contemporary kitchens and bathrooms. For Extra Care only, a statement was included asking for views on the provision of a separate communal bath designed to be accessible for those with reduced mobility so they can either get into and out of the bath unaided or can be assisted with washing. Fennell (1987) found opinions varied on the merits of providing separate specialised bathrooms. Although it is cheaper and easier to incorporate accessible bathing facilities into the specification of Extra Care buildings at the initial design and construction stage, they do take up a considerable amount of space which comes at a cost as well as the cost of the provision, installation and maintenance of the expensive and complex free-standing bath itself. Even with efforts to make these baths look and feel like a spa facilities, they can appear very functional and uninviting and act as a signal of dependency akin to a hospital or care home rather than encouraging independent living. Fennell et al (1981) found that whilst for some older people these facilities were a necessity, they were more often used by people living in the outside community making use of the scheme’s facilities and most people felt it unnatural to be bathed other than in their own home.

## **PERSONAL SPACE**

**#24 You have your own home with your own front door**

**#38 Small flats**

Percival (2001, p831) noted “the symbolic importance of a tenant’s individual front door”, often referred to it as their ‘street door’, notwithstanding that they opened onto quiet carpeted corridors rather than busy roads. Devlin and Morris (2011) considered that “having control over your home means having your own front door and deciding how involved you want to be with friends, neighbours and family” (p8) and to achieve that it was essential to ensure that “each house or flat has its own front door” (p11). Benjamin and Stea (1995) felt that for a dwelling to feel like a person’s home it had to be seen as a place of “privacy and refuge”, but also be a place of significance in terms of identity. Saunders (1989) considered the home as a place of ‘ontological security’ (Giddens, 1984) “where people are off stage, free from surveillance, in control of their immediate environment ... it is a place where they feel they belong” (p184). Means (1977) showed that the home was a place of meaning to older people in terms of security, refuge, a place where they could express individuality and a place where they could retain control of their lives and not be dependent.

Morgan (2009) saw locks as being symbolic of having control over property and the right to permit or deny others access to your personal space, so suggested that a person could not

say that they had their own front door unless it had an operating lock with a key and they had the right to lock or open it as they pleased. Eckert et al (2009) however recognised that the issue of room locks could be contentious in an assisted living setting, because of the need to balance the philosophy of maximising privacy, autonomy and choice for residents against the need to meet regulatory requirements. Morgan (2009) believed that attitudes to locks might signify whether a setting is seen by residents as being primarily as a housing or a care setting. If staff have master keys or access to key safe combinations and regularly 'knock and enter' then residents are indicating a willingness to sacrifice the sanctity and control of their own front door for access to barrier free care or support.

The heightened significance of 'home' to older people is often emphasised (e.g. Saunders, 1989; Gurney and Means, 1993; Langan et al, 1996; Heywood et al, 2002). The meaning of home, however, is socially constructed so will vary according to the age, health, personal circumstances, life experiences and personal disposition of each individual. Rowles and Bernard (2013) emphasise that a home is more than a physical space. Leith (2006, p318) felt "the meaning of home is complex and incorporates many dimensions" and Pallasmaa (1995, p133) saw the home as a "complex condition that integrates memories and images, desires and fears, the past and the present". Oldman and Quilgars (1999), however, were critical of what they saw as a tendency to romanticise conceptions of home for older people and argued for a humanist perspective that considered the relationship between individuals and their environment. Leith (2006), Cutchin (2103) and Bartlam et al (2103) consider the particular challenges and dynamics that older people encounter in becoming 'at home' in age-specific housing settings such as Retirement Housing and Extra Care. The preference that is given to the statement 'you have your own home with your own front door' may also help to expose differences of perspectives on the importance of home in these settings.

Oldham (2014) suggests that as people age they generally require less space, but they still want sufficient space to hold onto the things they value. Reynolds and Beamish (2003, p46) found, that although people moving to age-segregated housing facilities recognised that the properties would be smaller and paring back would be required, the process of 'downsizing' was not always welcomed. Percival (2002) suggests that for older people to feel at home in a smaller properties they still needed to have enough space to accommodate familiar furniture and heirlooms of sentimental value and have the option to configure the layout to their own choosing.

Roberts-Hughes (2011, p4) noted that "a lack of space has been shown to impact on the basic lifestyle needs that many people take for granted, such as having enough space to store possessions or even to entertain friends. In more extreme cases, lack of adequate space ... has also been shown to have significant impacts on health" (p4) Percival (2002) found that a lack of space in sheltered housing effectively precluded or at least made it difficult to have guests for a meal thus denying residents an opportunity for meaningful socialisation and suggested that the loss of capacity to cater for their family when they visited might have an adverse impact on their sense of self-identity.

Percival (2002) saw it as a paradox that older people wanted less space so their home was manageable and affordable yet wanted enough space to preserve self-esteem. A consistent

message therefore appears to be one of 'less but enough' (Wood, 2014; Oldman, 2014) and a preference for the concept of 'rightsizing' rather than 'downsizing' (Best and Porteus, 2016; Hammond et al, 2018).

Park (2017) notes the historical trend towards smaller properties and analysis by Evans and Hartwich (2005) suggested that home sizes in the United Kingdom were not only shrinking they were already the smallest in Western Europe. Official guidance in 1949 suggested that one bedroom properties of 41.8m<sup>2</sup>-51.1m<sup>2</sup> would be suitable for households of 2 aged persons (Dury, 2006). The Parker-Morris report 'Homes for Today and Tomorrow' (Ministry of Housing and Local Government, 1961) set the space standard for a one bedroom two person property at 50 m<sup>2</sup> but reduced this to 37 m<sup>2</sup> for properties in sole occupancy. However, the Parker-Morris standards ceased to be applicable after the Local Government Planning and Land Act 1980 left space standards to be determined by market forces in a bid to reduce costs and increase development.

Despite a trend to smaller and even 'mico-housing' there is a recognition that such ultra-small housing may not be suitable for older people (Kichanova, 2019). Offering 'under-sized' properties may not be effective in encouraging older people not to under-occupy properties that are too large with multiple spare bedrooms (Morgan and Cruickshank, 2014), especially as older people (over retirement age) in receipt of housing benefit are currently exempt from the so called 'bedroom tax' that would limit their eligible accommodation to one bedroom only. Pannell et al (2012) suggest two bedrooms as a minimum requirement that older people would consider to give them enough space and Park et al (2016, p91) recommend a minimum size of 55m<sup>2</sup> for a one bedroom downsizer property.

It is therefore considered appropriate to test the level of preference or objection that older residents of Retirement Housing and Extra Care have to small flats.

## **FEATURES AND AMENITIES**

### **#16 An effective and efficient heating and hot water system**

Analysis by Adams and White (2006), based on data from the English House Condition Survey, indicated that households containing people aged over 65 spend more than 80% of their time in their home and this rises to over 90% for those aged 85 and above. Although the government considered that as people grow older a decent home that provides a warm, secure environment that meets their individual requirements is crucial, the incidence of people living in non-decent and energy inefficient housing is higher for older people than for other age groups (Office of the Deputy Prime Minister, 2006). Having a heating system that is over 12 years old makes a property almost twice as likely to fail the thermal comfort criteria, yet over half of all older households do still have heating systems over 12 years old (Adams and White, 2006, p7). The good news though is that "those living in social housing are least likely to experience fuel poverty, with ... those living in registered social landlord accommodation being the best off, with 64% spending less than 5% of their income on fuel and with households spending less on fuel as the age of the oldest occupant increases" (Adams and White, 2006, p19).

Fennell (1987) found that warmth and central heating was ranked as by far the most important factor by residents with 73% saying it was very important and a further 17% indicating it was quite important. Sykes and Leather (1997) similarly found heating to be a key concern for older people, while Fox et al (2017, p5) noted that poor heating was one of the very few issues that residents of Irish sheltered housing had any complaints about.

The Communities and Local Government Committee (2018) found there was “a well-evidenced link between cold homes and chronic diseases” (p10) and the effects of living in cold homes are believed to contribute to the approximately 27,000 excess winter deaths each year in the UK (Hills, 2011). It is well known that “older people can experience diminished capability in maintaining stable core temperature; reduced vasoconstriction response to thermal stress means the aged body is often less effective at diverting blood away from the skin to prevent heat loss when exposed to cold temperatures. In addition, reduced skeletal muscle mass leads to a lower metabolic rate meaning that less heat is generated within the body and the threshold at which shivering is induced is lowered” (Lewis, 2015, p205). But, although cold is still predominantly seen as a health risk, there is less recognition that excessive heat can also present a significant risk to the health of older people (Gupta et al, 2016).

The report of the Housing our Ageing Population: Panel for Innovation (HAPPI) (Homes and Communities Agency, 2009) noted that “as we get older, we are less able to control our own body temperature and get too hot or too cold more easily” (p36) so included a recommendation that homes should not only be “energy-efficient and well insulated, but also well ventilated” (p39). When Designing for Wellbeing in Environments for Later Life, Park et al (2016) noted that as “many new homes (particularly apartments) are well-insulated but poorly ventilated, there is a danger that overheating will be the next big health issue” (p44). Guy (2013) found that whilst residents in modern Extra Care developments appreciated their low energy bills it was becoming increasingly common for buildings to overheat due to high levels of thermal insulation compounded by design features such as heated corridors with restricted window opening, which was causing discomfort and distress. Lewis (2015) suggested the problem was that schemes were being designed for an ‘imagined user’ who was presumed to have particular characteristics without recognising that thermal comfort depended upon a combination of physiological, psychological and environmental factors (Howden-Chapman et al, 1999).

The study seeks to test how important having “an efficient and effective heating and hot water system” is to residents and whether this is still a prime concern or more of a ‘hygiene factor’ (Maslow, 1943).

## **#18 A garden or balcony so you can sit out in private**

The Housing our Ageing Population Panel for Innovation (HAPPI) (Homes and Communities Agency, 2009, p35) noted that “many older people find it hard to give up their garden, even when they are struggling to maintain it ... large, sheltered or semi-enclosed balconies, which can feel more like extra rooms, provide a practical substitute” and “outdoor spaces that offer

a fully accessible extension to the home, usable for much of the year, are valuable to those who leave the home less frequently". Percival (2002, p738) had similarly observed that "not all older people want the responsibility of a garden and some happily relinquished it when moving to sheltered housing, but for those who value their own plot of land, a future without a garden can be rather bleak".

Studies suggest that older people place particular importance on having access to outdoor spaces (Heath and Gifford, 2001; Perkins, 1998), and that patios or balconies were especially valued by older people living in apartments (Cranz and Schumacher, 1975; Cranz, 1987). Barnes (2002), reporting on work by a Design in Caring Environments Study Group, found that gardens in care settings were being conceived as merely 'decorative features' without regard to their importance for well-being and potential therapeutic benefits. Barrett et al (2016) noted there is growing interest in the impact that access to the outdoors and nature can have for people living with dementia (e.g. Brawley, 2001; Gillard and Marshall, 2012; Clark et al, 2013), but still found that this remained "limited and fragmented and often anecdotal" (p10).

Alves and Sugiyama (2006) noted that although studies had shown that gardens can offer older people physiological, psychological and social benefits, there was little research on the specifics of how gardens in sheltered housing should be designed or configured. Burton et al, (2015) felt that design of outdoor space was "rarely based on evidence" but to "stem from assumptions or professional opinions about what older people want or is best for them".

Cranz and Young (2010) conducted a study to determine why outdoor spaces which were said to be greatly appreciated appeared to be little used in practice, but Burton et al (2015, p165) suggest that benefits are not necessarily linked to time spent outside and "the strongest impacts of greenery may derive from viewing it from inside". Burton et al (2015, p170) also found that whilst the benefits of garden space is greatest where it is private and for personal use only, shared outdoor spaces can also have a beneficial impact on well-being and provide opportunities for social interaction. The Wel-Hops Project (2007, p99) saw the garden space around buildings housing older people as a form of 'cushion' or buffer zone that allowed residents to relate to others and the world around them but still feel safe and protected. This reflects the assessment of Zaff and Devlin (1998) on the importance of semi-private and defensible garden space for neighbour interaction and creation of a sense of community.

The statement specifically asks about the preference for a garden or balcony so residents can be private while outdoors as this reflects the recommendation of the Housing our Ageing Population Panel for Innovation (HAPPI) that housing for older people should include "balconies, patios, or terraces" (Homes and Communities Agency, 2009, p38), whilst recognising that Burton et al (2015, p171) found that balconies did not appear to provide the same benefits for dwellings above ground level and it is therefore better to provide patio space for residents to sit out in even if it is not directly connected to a resident's living space.

## #20 Availability of a good internet connection and/or wifi

Park et al (2016) when considering what older people are likely to expect from their housing in later life thought that they would want it to be well connected digitally as well as physically and noted that “a high-speed internet connection has already become a vital home utility, and a growing number of third agers now rely on digital interfaces to keep in touch” but also warned that “those without the will, skill or opportunity to get online are at risk of further isolation and disadvantage” (p17).

Although the majority of adults in the United Kingdom do use the internet, Dutton et al (2005) and Dutton and Blank (2013) found that older people make up only a small proportion of those online. In 2016 4.2 million (79%) of the 5.3 million adults in the UK who had never used the internet were aged 65 or over (Age UK, 2016). Age UK (2016) also reported that whilst 26% of people aged between 65 and 74 do not regularly use the internet that figure increases to 61% for those aged 75 or over. Hannon and Bradwell (2007) show that digital exclusion is also closely associated with social exclusion so factors such as loneliness, financial hardship and health problems are also likely to exacerbate the distancing of older people from technology and “it continues to be the better educated, relatively well-off urban dwelling white males” (p6) who are avoiding the ‘digital divide’ with ‘silver surfers’ are still remaining something of an exception (Morris, 2007). The view of Norris (2001) that the polarisation between ‘users’ and ‘non-users’ of technology is a “social digital divide” appears to be confirmed by a recent survey of residents from a range of retirement communities and that found whilst overall 81% of them had access to the internet, that figure was 22% lower at 59% for those living in social rented properties (ProMatura, 2019).

Ofcom (2006) found that more than half those over 65 not using the internet had excluded themselves because they saw no reason for using it despite its potential benefits to older people in terms of social networks and contacts, access to information and understanding as well as shopping and obtaining services (Szabo et al, 2018) and the opportunity to make financial savings from the ‘digital dividend’ (Roberts, 2009). Vinney (1993) suggests that old people might be saying they are not interested in the internet simply because they are too proud to admit they lack the skills and need to ask for help. Loges and Jung (2001) and McDonough (2016), however, have expressed doubts that the disparity in internet use will simply be a generational phenomenon that will disappear as more people age who have spent time at home and work with computers. Age UK (2016) have noted that whilst some older people start using the internet in later life there are others who opt out and stop using technology as they age. Xie (2003) and Wagner et al (2010) both found that as age increased attitudes towards technology became more negative. Although Sixsmith and Sixsmith (1995) were critical of ageist assumptions that older people necessarily lacked the cognitive abilities to use computers, they did concede that they might encounter more intractable problems due to loss of dexterity or declining eye sight.

Sourbati (2004) found amongst tenants in sheltered housing it was a combination of a lack of appreciation of the potential benefits, unavailability of training or suitable equipment and their perception of risks and complexities that was deterring them from using the internet. Berry (2011) though cautions against simplistic assessments and suggests that any

understanding of the reasons for the digital divide is likely to require an appreciation of multiple factors and circumstances.

The prediction of Hannon and Bradwell (2007) and Morris (2007) was that the digital divide is likely to get narrower but deeper and even though digital exclusion may affect fewer people in the future the consequences of exclusion for those who miss out on the 'digital dividend' are likely to be more severe. Thirty years ago when Fennell (1987) conducted his assessment of sheltered housing in Scotland he noted that virtually all schemes had a coin telephone call box. These are now a very rare sight but it will be interesting to gauge the priority given to ensuring Retirement Housing and Extra Care enables residents to get connected to today's internet technology.

## **MODERNITY**

### **#39 Properties and facilities that are modern and well designed**

#### **#41 Contemporary kitchens and bathrooms**

Because a lot of Retirement Housing was built in the 1970s and 1980s it is sometimes seen as being old fashioned and not a particularly modern housing proposition (Bligh, 2017. p1). Croucher (2008) found that the aspiration of older people was not necessarily for modernity but merely that their housing should have been "designed with growing older in mind". Similarly the Housing our Ageing Population Panel for Innovation (HAPPI) (Homes and Communities Agency, 2009, pp38-39) emphasised the importance of design in the layout of accommodation, the provision of natural light and incorporation of the natural environment. Park et al, (2016) and the DWELL project also focused on design and emphasised its importance for age-friendly general housing, whilst recognising that there is no ideal downsizer proposition that is right for all older people.

A considerable amount of money may be required to be spent on modernising the existing stock of older Retirement Housing so it is relevant to investigate how important this is compared with other facets and features of Retirement Housing and Extra Care.

Sims et al (2012) suggest that for some people "the kitchen is the centre of the home" but noted that the relationship older people have with their kitchen varies not only depending upon design, nature of the kitchen itself but also the nature of the property it is within and other characteristics of the occupants as well as their age. Oliver et al (2001) found the accessibility of the kitchen to be an important factor in determining the quality of life for older and disabled people and noted that many respondents reported using 'coping strategies' such as sliding rather than lifting pans and using eye level grill to avoid bending down to put things in the oven. The priorities for kitchen improvements identified by Oliver et al (2001) were concerned with functionality and accessibility rather than style and appearance and included improved lighting, enough (not too much or too little) space, having things within reach and mid-level appliances (especially ovens).



It will be interesting to note the extent to which the priority for residents of Retirement Housing and Extra Care will be for 'contemporariness' in their kitchens and bathrooms and how this compares with other features and facets including aspects of accessibility.

### **SETTING (Location and Appearance)**

- #4 Close to shops, amenities and transport**
- #7 The appearance of the Court creates a good impression**
- #25 In a nice area with attractive surroundings**
- #40 Buildings and gardens are kept clean and tidy**

Park et al (2016) saw the location of housing as a key factor in determining its desirability and suitability, but acknowledged that this was likely to also be influenced by a complex mix of emotional associations and family ties as well as practical considerations regarding amenities, transport and affordability (p15). Older people don't tend to move far from their previous home when moving to Retirement Housing or Extra Care, with 24% of people moving less than a mile with the average distance moved of 3.1 miles being somewhat influenced by larger distance moves to high end retirement villages and schemes in rural areas (Caterwood, 2014).

Boyle (2011, p13) thought that "accessible housing is of limited use unless it is developed in areas where there are adequate transport links to local facilities". Park et al (2016, pp15-16) did not consider proximity necessarily guaranteed accessibility and thought proximity was a poor indicator of connectivity as the provision of free bus passes had increased mobility, yet many superstores and out of town shopping centres remain relatively inaccessible without a car because they are poorly served by public transport services.

Croucher (2008) felt that in order to be considered 'age friendly' a neighbourhood did not simply have to be convenient for shops and transport, it also needed to provide a sense of neighbourhood. Reynolds and Beamish (2003) confirmed the view of Lawton (1980) that older adults with high economic status were more likely to want their housing to be a good location with a high reputation. The 2008 Strategy for Housing in an Ageing Society quoted research by property consultants Savills in 2007 (Department of Communities and Local Government, 2008, p136) that said that a welcoming neighbourhood and an attractive external appearance were the two most important considerations for older people.

Unfortunately whilst older sheltered housing may still be functional and accessible it is often found lacking in terms of aesthetics. Evidence from the United States suggests that elderly people living in higher quality homes felt more attached to them and this in turn had a positive impact on their overall well-being (Evans et al, 2002). Although there appears to be little research specifically on the topic of the effect of cleanliness this was one of the factors identified as important for residents living with dementia in housing with care settings in the UK (Barrett et al, 2016).

It appears there is merit in considering the relative importance of a range of different aspects of location and appearance to residents of Retirement Housing and Extra Care to determine the extent to which these are regarded as priority issues for them or not.

## **SHARED FACILITIES**

### **#9 Use of a communal lounge and other shared facilities**

#### **#49 Common lounge used by external organisations and groups**

Fennel (1987) found that 11% of sheltered housing schemes in the sample included in his study did not have a communal lounge, but 23% had more than one lounge. Where there was a communal lounge Fennell (1987) reported that almost a third (32%) of residents said they used it less than once a month. Having a communal space that is under-utilised or not-liked, not only represents a waste of space and resources, but also a missed opportunity to provide a facility to improve social interaction, well-being and resident satisfaction (Campbell, 2014). Batty et al (2017) also found the extensive communal facilities in Extra Care (including large lounges, libraries, cinemas, activity and craft rooms, computer rooms, hair dressing salons and ‘pamper’ bathrooms) were often under-utilised and difficult to justify. This is not a uniquely British problem and Zavotka and Teaford (1996; 1997) found that in Assisted Living Schemes in the United States lounges were used by only 16.6% of residents, with reports of similar issues also being encountered in Sweden (Andersson et al, 2016).

Percival (2001) suggested that “communal lounges are popular locations for tenants’ formal social activities, but appear to be of less interest as informal meeting places, because of their size, instrumental use, and tendency to emphasise loneliness and old age in age-segregated settings” (p839). Communal rooms have been criticised as being too large, over formal and potentially alienating places (Percival, 2001, p836; Jerrone, 1992; Middleton, 1982a). Park et al (2016) suggest that the success or otherwise of communal areas may depend upon “how ‘institutional’ the space looks and feels” (p40).

Communal areas are intended to be seen as an extension of the individual’s own property, but Andersson et al, 2014 found that residents tended to see their home as only their apartment whereas staff saw the whole building as being part of the residents’ home, but on the understanding that the residents’ homes is also their place of work. Malkin (1992) also reported that communal areas are often designed to impress visitors and administrators rather than to satisfy the desires of residents and Howell (1976) had previously connected underutilisation of social spaces with poor design, indicating that if residents did not feel an attachment to the space they would be unlikely to use it.

Cooper et al (1994) considered that the concept of sheltered housing has been impacted by a decline in the importance of communal living and facilities and a growing emphasis on private space and personal autonomy (p3). It is therefore relevant to consider the relative importance that residents attribute to the provision of communal space in Retirement Housing and Extra Care facilities.

Clapham and Munro (1990) and Woolrych (1998) suggested that if communal rooms in sheltered housing are under-utilised then they should be opened up and made available for outside use. The idea of sheltered housing becoming a 'community hub' based on the sharing of on-site services and facilities with people living in the wider community is not new but it has been suggested that it is becoming increasingly common (Evans et al (2017, p20). The 'community hub' view of housing with care, also sometimes referred to as the 'hub and spoke' model (Housing Support Unit, 2014), can take various forms. Benefits of opening up access to groups and individuals in the surrounding neighbourhood are said to include: schemes becoming "the hub of community life" (Bernard et al, 2012, p116), strengthened community relationships (Croucher and Bevan, 2010), reduced isolation (Kneale, 2013), improved awareness and marketing to potential residents (Evans et al, 2017) as well as cost effectiveness. There has though been relatively little research or literature examining the implications, particularly for residents, of adopting a 'community hub' model within the housing and care setting of either Retirement Housing or Extra Care (Barrett et al, 2016, p9; Evans et al, 2017, pp22).

Evans et al (2017, p29) did, however, find that there was resistance to the community hub model from some residents and they felt their privacy was being compromised as well as concern that their rent was going towards providing wider community facilities. Croucher et al (2007) identified sharing of facilities with the wider community as controversial and a challenge in overcoming the sense of intrusion felt by some compared with the opportunities for wider social contact welcomed by others. These findings were echoed in studies reported by Callaghan et al (2009) and Evans and Vallyelly (2007). Onger (2009) also questioned whether the increasing use of housing and care settings by the community and by social care professionals as a base to work from was compatible with the design and purpose of these facilities as residents' homes.

It is therefore considered appropriate to also test residents' satisfaction with the communal lounge and views on the merits or otherwise of it being used by external organisations and groups.

#### **#15 A communal laundry room with washers and dryers**

A study by Fennell (1987, p17) concluded that "the scheme laundry is ... an invaluable amenity" and a "universal feature of sheltered housing ... almost every scheme has one". He found that the laundry was being used regularly by 84% of tenants, with just 4% having their own washing machine, 4% preferring to hand wash everything and 8% having their laundry done for them by someone else (usually a family member) (p100). Although a study by Clapham and Munro (1990) found that the availability of a communal laundry was not cited as a consideration in the decision to move to sheltered housing they nevertheless noted that the laundries provided were extensively used (p30).

Communal laundries might be thought to be a historical anomaly and an anachronism in the modern age, but the evolution of laundries has a degree of resonance with the development of sheltered housing. Just as the Poor Laws had provided for workhouses to house the aged

and destitute the Public Baths and Wash Houses Act 1846 made provision for hot water and wash tubs for the cleaning clothes (Crook, 2008). The first public launderette in the United Kingdom opened in London in May 1949 and then spread rapidly across the whole country as the same time as the concept of sheltered housing was also being developed and starting to be built in volume. Launderettes were at the height of their popularity in the 1980s with some 12,500 across the United Kingdom (Bloom, 1988). In 1985 launderettes featured in the film 'My Beautiful Launderette' (Frears, 1985), the famous Levi 501 jeans advert (Bartle et al, 1985) featuring Nick Kaman stripping down to his boxer shorts and this was also the year when the EastEnders soap opera (BBC, 1985) was launched featuring the Bridge Street Launderette as a central location in Albert Square. Since then private washing machine ownership has increased and launderettes have been in decline with less than 3,000 remaining in 2012 and many of these were struggling to remain viable with a client base of those still too poor to afford their own washing machine plus the occasional use for bulky items such as duvets that are too big for domestic machines (Khan, 2010; Nicholas, 2016; Poulter, 2016).

Is it a coincidence that as well as being the heydays for laundries the 1980s were also the peak years for the development of retirement housing (Galvin, 2016) and the nature, justification and future suitability of sheltered housing has similarly also been subject to doubts and questioned since the 1980s (Butler et al, 1979; Middleton, 1982a; Tinker 1989).

In 1970, when sheltered housing started to be developed in volume only 65% of households had their own washing machine, but washing machine ownership has now at 97% reached saturation point (Office for National Statistics, 2018d) so is it appropriate to ask if it is still sensible and justifiable to continue to provide communal laundries with washers and dryers in retirement housing and extra care developments. There are though a range of potential explanations and reasons why older people in sheltered housing might want to retain a communal laundry with washers and dryers.

Middleton (1982a, p37) suggests that communal facilities such as laundries were introduced in sheltered housing as a consequence of the limited size of the individual properties, especially in the case of 'studio' (i.e. bedsit) apartments. Even larger flats often had quite small kitchen spaces that would not accommodate a washing machine and particularly not a dryer as well. Stephens (2018) suggests that communal laundries are preferable to in-property washing machines, not only to free up space, but because bigger machines are more efficient and can be used more productively than individual machines. With a communal laundry there is also less scope for nuisance between properties from water leaks or the noise and vibration of in-property washing machines.

The ideal of drying clothes is on a washing line in a country garden with stiff breeze on a sunny day (Consumers Association, 1959) was not always an option. Whilst there has been a significant reduction in the number of properties with damp problems in England (Department for Communities and Local Government, 2016) falling from 13% in 1996 to 4% in 2015 the most persistent form of damp problem still comes from condensation. Needing to dry clothes indoors can lead to excess moisture within the home which is the biggest cause of condensation and Menon and Porteous (2011) found that "the issue of drying domestic

washing is a common problem in all housing types across private and social housing sectors” (p6). Airing of laundry can also make a room feel cramped and may be particularly difficult in a bed-sit or small flat so it is an obvious advantage to have access to a dryer so that clothes can be dried and put away without delay.

Yates and Evans (2016) concede that laundry practices may not be primarily a consequence of technical considerations. Although laundry may appear to be a rather mundane and ordinary activity, there is an emerging body of literature (e.g. Kaufmann, 1998; Shove, 2003; Pink, 2005, 2007, 2012; Pink et al, 2015; Watson, 2015) that suggest laundry habits form an inextricable part of forming a sense of person’s sense of identity and relationship of with their home that has the potential to reconcile social, environmental, economic and psychological considerations.

Laundry has often been seen as ‘women’s work’ (Mohun, 1999; Shove, 2003) and Kaufmann (1988, p13) suggests that “women’s history is deeply inscribed in every fold of their linen”. Cowan (1983, p150) argues from a Marxist/feminist perspective that it is because of women’s position outside the labour market that laundry is an activity done at home and has not been commercialised, while Strasser (1982, p122) suggests that fabric, detergent and washing machine manufacturers all exert influence to define clothes cleaning as an essential home based activity. Although laundry is a form of housework, its significance as a means to maintain independence and self-esteem is often over looked (van Herk, 2002). Laundry care has been identified as a key aspect of dignity and identity for residents of residential and long-term care facilities (Bayer et al, 2005; Calnan et al, 2006; Procter & Gamble Professional, 2006; Austin et al., 2009; Armstrong, P. and Day, S., 2017). Clark et al (1998) found that commissioners of support services failed to recognise the significance that a ‘little bit of help’ to enable older people to keep up with domestic housework and laundry could have for older women in particular. Pink (2007) echoes the study by Kaufmann (1988) in suggesting that identities and conceptions of ‘home’ are constituted through the role that laundry plays in domestic settings.

Laundry is not solely concerned with hygiene and the need to keep our bodies clean. More often it is about refreshing and presenting clothes so they look, smell and feel fresh. Douglas (1984, p2) suggests that washing and cleaning is motivated by the need to create a sense of order and Shove (2003, p124) sees it as fulfilling a sensory rather than a practical purpose and to be more concerned with maintaining appearances. How well someone takes care of their clothes and ensuring they are clean can thus become an indicator of their level of self-respect and how well they are coping. Ability to do one’s own personal laundry is included as one of the Instrumental Activities of Daily Living (IADL) used to assess levels of personal functional competence amongst older people (Lawton and Brody, 1969; Lawton, 1990; 1999).

Communal laundries are not just places for washing and drying clothes, they also serve as a social meeting point. Robson et al (1997, p98) recommend “comfortable seating” as a standard feature of communal laundries and two recent co-housing developments have both opted to have communal laundries to encourage resident interaction (Brenton, 2017; Moore, 2014). Watson (2015, p881) suggests that a communal laundry could provide opportunities

for “casual relations of sociality” without the formality associated with encounters in the communal lounge, which Percival (2001) identifies as being consistent with the benefits Granovetter (1983) said came from the creation of ‘weak ties’.

However, communal places may also be sources of tension and antagonism and communal laundries can be regarded as problematic by some residents (Barnes et al, 2012, p1208). Concerns have been raised about the risks of cross-infection (particularly from pets) or simply not wanting to take washing through communal areas for other residents to see. Common complaints also relate to capacity and having to wait for a machine, but where rota systems are in place they were found by Fennell (1987, p100) to be unproblematic.

It thus appears likely that how residents of Retirement Housing and Extra Care respond and interpret the importance of the provision of communal laundries will be influenced by a complex mix of factors and considerations.

## **#22 Sufficient car parking spaces**

76% of households in Great Britain have at least one car (Department for Transport, 2019, NTS0205) and 35% have access to two or more cars, but most of the 24% of people who do not have access to a car are in single person households (Leibling, 2008). The proportion of people holding a driving licence also declines with age (87% of 50-59 year olds have a driving licence compared to 67% for people aged over 70) (Department of Transport, 2019; NTS, 2001). Figures from the Scottish Executive (2007) also show that car ownership declines with age, indicating that 78% of households headed by someone aged 50-59 own a car compared with 36% for households headed by someone aged 75 years or over. But despite this, increases in levels of car ownership have been most pronounced amongst those aged 65 or over, with an increase of over 10% between 1999 and 2005 (Scottish Executive, 2007).

Developers of retirement properties for sale typically provide one parking space for every three properties (Burges, 2013) and justify this on the basis that even if residents do have a car when they move in, they will quickly decide that they no longer need a car due to the location of properties with good access to public transport, shops and healthcare facilities, although this might simply be because they have difficulties finding a parking place. Park et al (2016), however, suggest that the older people they classify as ‘third agers’ are typically seeking the best of both worlds, wanting to keep their car (and car parking) to allow for independent travel, as well as also wanting the convenience of local shops and services on hand for every day access (p16). They also point out that “even for those who cannot or no longer wish to drive, visitor car parking remains important to allow guests and family members to visit easily” and “the idea of ‘not being able to park’ the car is a fear commonly associated with apartment living” (p16).

Previous studies have found that car parking can be an important and contentious issue for older people and at housing with care schemes in particular (Croucher et al, 2007; Croucher and Bevan, 2010; Boyle, 2010). Pannell and Blood (2011) found that insufficient parking can result in tensions between residents and visitors leading to a risk that ‘outsiders’ will become

more reluctant to visit, as well as conflicts between the parking requirements of residents and staff who work on the site as carers, cleaners, caterers or hairdressers etc. They also suggest that without sufficient disabled parking spaces wheelchair users could also be impeded in getting into or out of vehicles (p5).

The ease of parking is thus recognised as an important concern in the provision of housing for older people (Wel-Hops, 2007, p105) and hence considered to be a valid question for consideration by the study.

#### **#50 Guest room available for visitors**

Guest rooms are a common feature of Retirement Housing and Extra Care schemes and Fennell (1987, p20) considered them to be “an important component of a sheltered housing scheme”. They were introduced on the basis that a guest room could provide accommodation if a tenant became ill and a family member needed to stay with them to provide temporary support, but such scenarios arise so infrequently that they are more generally used by visiting friends or relatives who do not want the hassle of finding hotel accommodation or by tenants from other schemes run by the same landlord who simply fancy visiting somewhere new.

Fennell (1987) found that limited use was being made of guest rooms with over 50% of residents surveyed saying they had not had visitors who had stayed in the guest room. Intensity of guest room use is likely to be determined by the convenience and attractiveness of the location as well as the quality of the guest room facilities.

Some guest rooms provide nothing more than a furnished bedroom on the assumption that guests will have access to the flat of the tenant they are visiting for washing and cooking facilities, but with changes in expectations and patterns of use more are being adapted to provide en-suite shower rooms and equipped with kettles, fridges, micro-wave cookers. Televisions are not however not normally provided because of the need for a separate TV license.

Although the provision of guest rooms does appear to fall within the scope of Middleton’s (1982a) criticisms of the communal features of sheltered housing as historical anachronisms that are a consequence of providing only bed-site or one-bedroom accommodation that is too small to accommodate visitors, they do appear to still have some support. The report of the Housing our Ageing Population: Panel for Innovation (Homes and Communities Agency, 2009, p39) included a recommendation for the provision of guest rooms for visiting relatives. It was therefore considered relevant to include the provision of guest rooms as one of the features that residents were asked to prioritise even though it had not been raised as an issue in the responses and comments from the original scoping survey.

## **#52 An on-site restaurant (EC)**

Unlike in care homes, residents in Extra Care do have kitchens in their properties (hence Statement #41 asking about the importance of contemporary kitchens and bathrooms), yet the provision of meals is still seen as a defining feature of Extra Care. In order for a scheme registerable as a retirement community under the Associated Retirement Community Operators Consumer Code (ARCO, 2017) it must “make meals available in restaurants or dining areas” (p8 3.1(f)).

There is some understanding of what is expected in terms of quality meal provision and nutrition in care homes (CSCI, 2006) but very little clarity about the nature and type of the catering that should be provided in Extra Care settings. Sweetinburgh and King (2007) found there was considerable diversity of approach to meal provision and varying standards in terms of the offer, quality and funding arrangements across providers of Extra Care. Experts often disagree on the rationale for providing dining facilities (Choa et al, 2008) but Sweetinburgh and King (2007) suggest that they may include some combination of ensuring well-being and nutrition, creating an opportunity for social engagement or simply giving pleasure and structure to the day.

Curle and Keller (2010) showed that the dining experience also had an important emotional and social component and Kenkmann and Hooper (2012) found that having consistent mealtime companions was particularly valuable. Frankowski et al (2011) saw the dining-room as central to the community life of assisted living schemes as the place where residents gathered and conversed. Residents tended to prefer not to visit each other’s properties but to interact in the communal spaces with the restaurant providing the perfect place for polite conversation, for jovial banter, arguments and gossip as well as being where some residents came to eat in silence.

Kane and Kane (2001) argue that choice and control with regard to food is particularly important in long-term care settings. Sydner and Fjellström (2005) considered the extent of choice about whether to have main meal in a restaurant in situations, such as Extra Care, where residents live in their apartments with their own kitchen facilities. Sweetinburgh and King (2007) found where some strong views from tenants where they were obliged to pay towards the cost of a daily meal as a condition of their tenancy. Although it was demonstrated that this could make the meal service more sustainable it was considered to go against the Extra Care ethos of encouraging residents to have as much freedom of choice and be as independent as possible.

Bailey (2013) thought that “the focus ... should be about creating an experience for guests and delicious quality food. A fresh look and innovation are needed to raise standards in line with an increasingly savvy and demanding customer” but Sweetinburgh and King (2007) “found very little evidence of tenant involvement in meals services, either in terms of asking tenants what it was that they wanted from a meals service, or of seeking views around tenant satisfaction with the service currently on offer” (p4).



Given the concerns about quality, viability and nature of the meal services being provided in Extra Care schemes it is appropriate to question whether an on-site restaurant is necessarily seen as an essential feature of Extra Care housing.

### **#53 Hairdressing salon on-site (EC)**

Ward and Holland (2011) suggest that the degree of concern shown to hair care is a good indicator of the priorities and approach of establishments for the care of elderly people. In hospitals hygiene rather appearance take priority, but in a social care context, such as Extra Care, access to haircare can provide a source of self-esteem, the importance of which has been found to increase with age (McFarquhar and Lewis, 2000). Age Concern (2006) recognised the importance of dignity in later life and argued that “maintaining a good appearance is vital for the well-being and confidence of each individual” (p14). Although it is said that hairdressers help older people, especially women, to maintain control over their appearance, Ward and Holland (2011) found there was sometimes a tendency towards a uniformity of style and provision of what they described as the ‘pensioners hairdo’, which they regarded as a subtle example of age discrimination – whereas younger people use their hairstyle to stand out there is an assumption that older people must conform.

Because haircutting is often accompanied by conversational engagement and people tend to forge close relationships with their hairstylist they have thus been recognised as playing an important role as a source of informal support and ‘community gatekeepers’ (Anderson et al, 2010). However, Ward and Holland (2011, p293) complain that “despite the significance attached to hairdressing in care setting for older people, it is a service and practice that remains largely unexplored in the literature on care and little is known of the relationships that develop between older service users and hairdressers”.

Nobody dies from a bad haircut, but the hairdressing salon might provide an important gauge of health of relationships with an Extra Care setting and hence this feature has been included as an additional statements even though it was not prompted by the comments and responses to the survey of Housing 21 residents.

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# **Appendix 5**

## **Site and Participant Profiles**

*Summary of demographic context, site facts and facilities, participant profiles and photographs for Retirement Housing Sites A-K and Extra Care Sites 1-5.*

Study locations were selected to provide a mix of urban, rural, sub-urban and seaside settings from regions and local authority areas across England with a range of population densities and demographic age profiles. Details of these are shown in Table A6.1.

**Table A5.1: Table showing Local Authority, Region, Setting, Population Density and Population Age Profile of Study Sites**

Location	Region	Local Authority	Setting	Population (2017)	Population Density (people/Km <sup>2</sup> )	Median Age	Population 65 or Over
RH Site A	EAST	North Norfolk	rural	104,067	108	53.5	32,128
RH Site B	EAST	Norwich	city	140,353	3,597	33.5	19,666
RH Site C	EAST	Cambridge	city	124,919	3,069	40.8	14,929
RH Site D	SOUTH EAST	Dover	port town	115,803	368	46.2	25,286
RH Site E	SOUTH EAST	Shepway	port town	111,427	312	46.6	25,594
RH Site F	SOUTH WEST	East Devon	seaside	142,265	175	50.7	40,761
RH Site G	SOUTH WEST	Cheltenham	market town	117,128	2,514	40.0	21,014
RH Site H	WEST MIDLANDS	Dudley	urban	319,419	3,261	42.2	61,235
RH Site I	EAST MIDLANDS	South Kesteven	market town	141,662	150	45.7	29,878
RH Site J	YORKSHIRE & HUMBER	Kirklees	urban	437,145	1,070	39.2	71,348
RH Site K	NORTH EAST	Northumberland	market town	319,030	64	47.7	71,838
EC Site 1	EAST	Babergh	rural	90,794	153	48.1	22,097
EC Site 2	SOUTH EAST	Portsmouth	city	214,718	5,316	33.8	28,385
EC Site 3	SOUTH WEST	Cotswold	market town	87,509	75	48.6	20,816
EC Site 4	WEST MIDLANDS	North Warwickshire	market town	64,069	225	45.7	13,084
EC Site 5	NORTH EAST	Sunderland	urban	277,249	2,017	42.3	49,945
	UNITED KINGDOM			66,040,229	271	40.1	11,316,467
	ENGLAND			55,619,430	424	39.8	9,471,893

(Office for National Statistics (MYE2, MYE5, MYE6), 2018c)

In 1994, McCafferty (1994) concluded that there was a significant unmet need for Extra Care (very sheltered housing) but a potential over-provision of Retirement Housing (ordinary sheltered housing). The Audit Commission (1998), however, noted that there was little consistency in the levels of sheltered housing across the country, with an abundance (and possibly even a surfeit according to Tinker et al, (1995)) of supply in some areas and a lack of provision in others. Data from the Elderly Accommodation Counsel (2015) confirms that this is still the case. Table A6.2 shows the extent of this variation in levels of specialist housing provision between the local authority areas in which the research sites are located.

**Table A5.2: Table showing Provision of Specialist Housing for Older People in the Local Authority Areas of Study Sites**

Location	Local Authority	Retirement Housing units (Rent)	Retirement Housing units (Rent and Ownership)	Retirement Housing units per 1,000 aged over 65	Extra Care units (Rent)	Extra Care units (Rent and Ownership)	Extra Care units per 1,000 aged over 65	All Specialist Housing (RH and EC for Rent and Ownership)	Specialist Housing units per 1,000 aged over 65
RH Site A	North Norfolk	570	883	27	70	70	2	953	30
RH Site B	Norwich	1,672	2,126	108	237	237	12	2,363	120
RH Site C	Cambridge	836	1,160	78	137	137	9	1,297	87
RH Site D	Dover	807	1,056	42	80	80	3	1,136	45
RH Site E	Shepway	742	1,370	54	39	121	5	1,491	58
RH Site F	East Devon	1,622	2,687	67	0	67	2	2,754	68
RH Site G	Cheltenham	723	1,320	63	49	170	8	1,490	71
RH Site H	Dudley	1,571	2,048	33	649	721	12	2,769	45
RH Site I	South Kesteven	251	680	23	123	165	6	845	28
RH Site J	Kirklees	1,425	1,486	21	291	291	4	1,777	25
RH Site K	Northumberland	1,781	2,119	30	77	144	2	2,263	32
EC Site 1	Babergh	351	394	18	95	95	4	489	22
EC Site 2	Portsmouth	2,320	3,168	112	243	243	9	3,411	120
EC Site 3	Cotswold	479	1,112	53	60	92	4	1,204	58
EC Site 4	North Warwickshire	41	167	13	0	0	0	167	13
EC Site 5	Sunderland	1,341	1,566	31	567	567	11	2,133	42
	ENGLAND	341,816	455,644	48	46,814	60,022	6	515,666	54

(Elderly Accommodation Counsel, 2015)

Retirement Housing and Extra Care sites were also selected that differed in their scale, service provision, age profile and facilities provided as shown in Table A6.3 for Retirement Housing sites and Table A6.4 for Extra Care Sites. There were also differences in the size and tenure if the individual units of accommodation at the different sites as shown in Table A6.5.

**Table A5.3: Table showing Scale, Service Provision, Age Profile and Facilities Provided for Retirement Housing Study Sites (A-K)**

Location	Number of Units	Year Built	Resident Court Manager	Full-Time Part-Time CM	Date CM Non-Resident	Kitchen Installation Date	Bathroom Installation Date	Heating Type	Lounge	Lift	Laundry	Guest Room (income 17/18)
RH Site A	27	1976	No	PT	December 2014	2007	2013	Communal (Oil)	Yes	Yes	Yes	Yes (£750)
RH Site B	43	1979	No	FT + PT	July 2015	2007	2015	Communal (Gas)	Yes	No	Yes	Yes (£940)
RH Site C	27	1973	No	PT	September 2012	2000	2013	Communal (Gas)	Yes	No	Yes	Yes (£1250)
RH Site D	49	1982	No	FT	July 2013	2015	2015	Communal (Gas)	Yes	Yes	Yes	Yes (£1070)
RH Site E	30	1973	Yes	FT	N/A	2003	2009	Electric Heaters	Yes	Yes	Yes	Yes (£60)
RH Site F	43	1978	Yes	FT	N/A	2006	2009	Electric Heaters	Yes	No	Yes	Yes (£950)
RH Site G	33	1978	No	FT	December 2014	2001	2010	Electric Heaters	Yes	No	Yes	Yes (£460)
RH Site H	86	1984	No	FT + FT	May 2015	2016	2016	Communal (Gas)	Yes	Yes	Yes	Yes (£1935)
RH Site I	24	1973	No	PT	June 2004	2003	2009	Individual (Gas) Boilers	Yes	Yes	Yes	Yes (£180)
RH Site J	67	1976	No	FT	January 2015	2000	2009	Communal (Gas)	Yes	Yes	Yes	Yes (£635)
RH Site K	30	1983	No	PT	April 2010	2013	2010	Communal (Gas)	Yes	No	Yes	Yes (£640)

**Table A5.4: Table showing Scale, Service Provision, Age Profile and Facilities Provided for Extra Care Study Sites (1-5)**

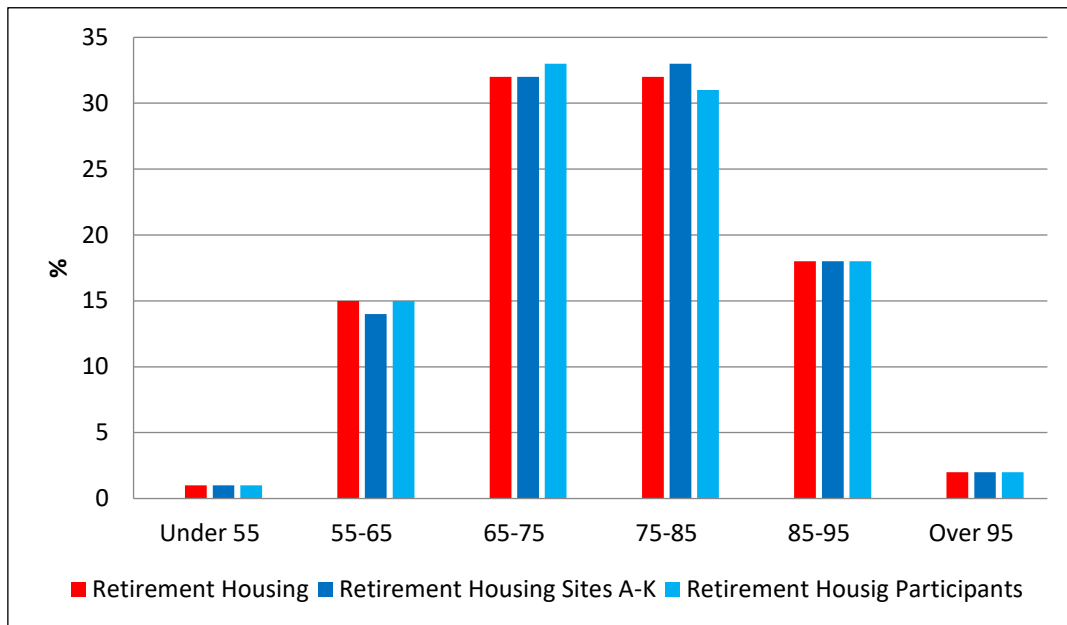
Location	Number of Units	Year Built	Kitchen Installation Date	Bathroom Installation Date	Heating Type	Lounge	Lift	Laundry	Guest Room (income 17/18)	Restaurant	Hair Salon	Assisted Bathing	Care Staff
EC Site 1	38	2004	2004	2004	Electric Heaters	Yes	Yes	Yes	Yes (£375)	Yes	Yes	Yes	Yes (H21)
EC Site 2	80	2015	2015	2015	Communal (Gas)	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes (3rd Party)
EC Site 3	60	2011	2011	2011	Communal (Gas)	Yes	Yes	Yes	Yes (£1190)	Yes	Yes	Yes	Yes (H21)
EC Site 4	70	2016	2016	2016	Individual (Gas) Boilers	Yes	Yes	Yes	Yes (£270)	Yes	Yes	Yes	Yes (H21)
EC Site 5	130	2016	2016	2016	Communal (Gas)	Yes	Yes	Yes	Yes (£2950)	Yes	Yes	Yes	Yes (H21)

**Table A5.5: Table showing Property Sizes and Tenures at Retirement Housing Sites (A-K) and Extra Care Sites (1-5)**

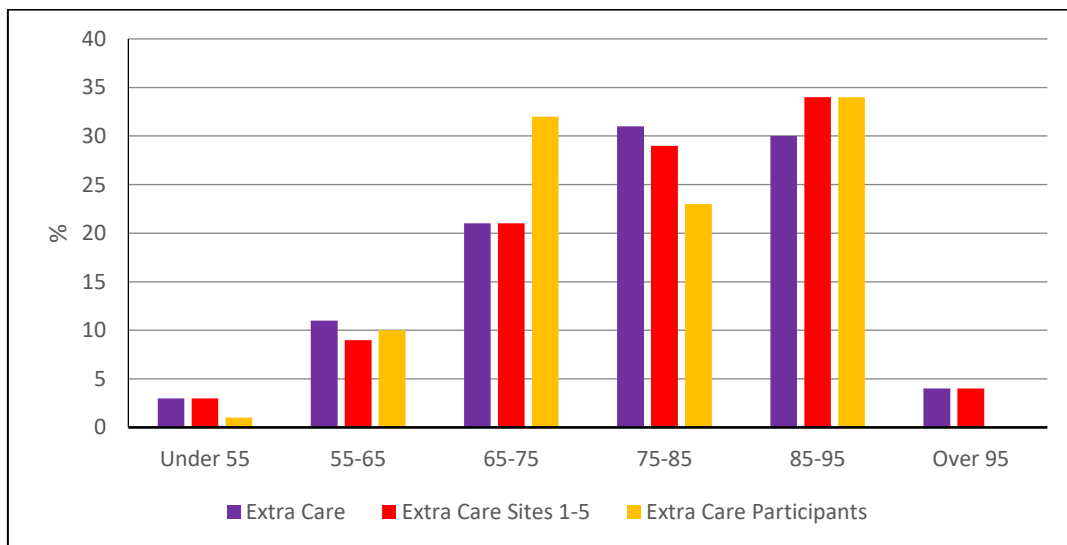
Location	Total Number of Units	Studio 1 Person	1 Bed 1 Person Flat	1 Bed 2 Person Flat	2 Bed 3 Person Flat	2 Bed 3 Person Bungalow	2+ Bed 4+ Person	Rent (Social or Affordable)	Shared Owner
RH Site A	27	5	6	14	1	0	1	27 (S)	0
RH Site B	43	14	0	28	0	0	1	43 (S)	0
RH Site C	27	9	0	16	2	0	0	27 (S)	0
RH Site D	49	15	1	31	1	0	1	49 (S)	0
RH Site E	30	0	14	16	0	0	0	30 (S)	0
RH Site F	43	7	10	26	0	0	0	43 (S)	0
RH Site G	33	8	4	18	2	0	1	33 (S)	0
RH Site H	86	20	18	45	2	0	1	86 (S)	0
RH Site I	24	20	0	4	0	0	0	24 (S)	0
RH Site J	67	6	0	59	0	0	2	67 (S)	0
RH Site K	30	0	19	10	0	0	1	30 (S)	0
EC Site 1	38	0	0	30	8	0	0	38 (S)	0
EC Site 2	80	0	0	61	19	0	0	80 (A)	0
EC Site 3	60	0	0	20	40	0	0	60 (A)	0
EC Site 4	70	0	0	0	70	0	0	70 (A)	0
EC Site 5	130	0	0	31	69	30	0	72 (A)	58

Although the participants at each site were recruited on an opportunistic basis, a check was made to assess the extent to which the combined P Sets for Retirement Housing and Extra Care reflected the mix and diversity of residents across the specific sites selected and the overall profile of residents in that type of accommodation in Housing 21. This assessment was based on the age profile, length of residence, gender and whether the participant lived alone or with a partner. Details of how the participant profiles compare against the collective site and Housing 21 positions are shown in Figures A6.1 to A6.8.

**Figure A5.1: % of Retirement Housing Participants, Residents of Sites (A-K) and Residents of Housing 21's Retirement Housing by Age Band**



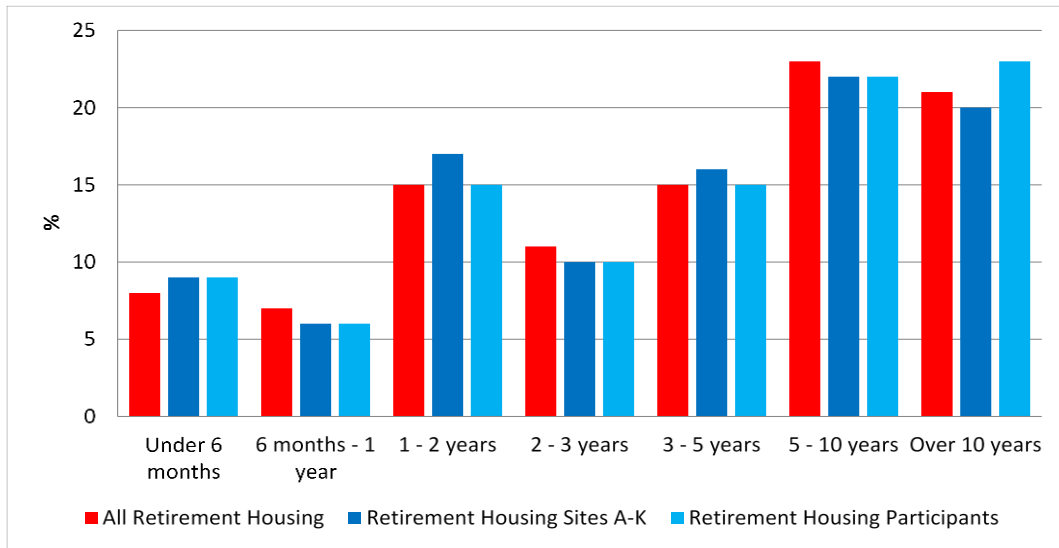
**Figure A5.2: % of Extra Care Participants, Residents of Sites (1-5) and Residents of Housing 21's Extra Care by Age Band**



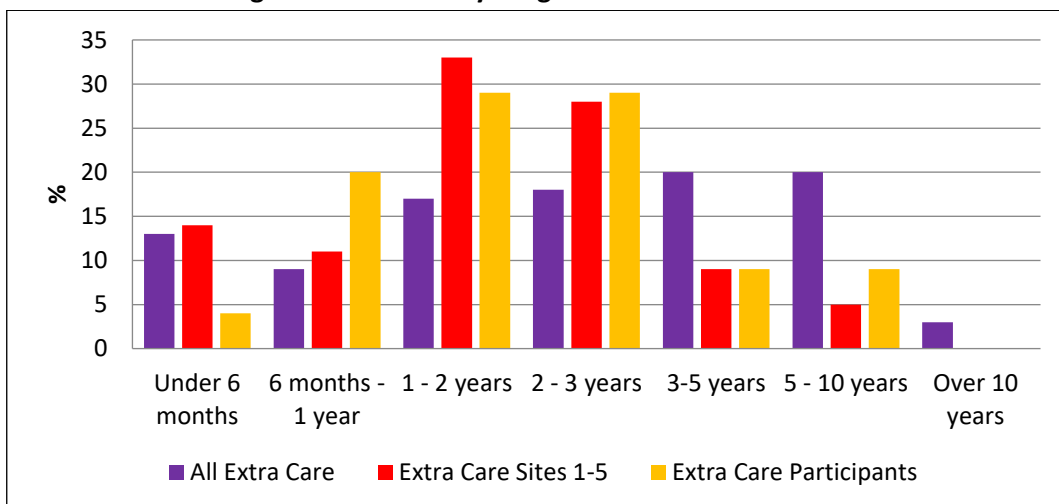
Whilst the profile of Retirement Housing participants reflects the age profile of Sites A-K and the overall age profile of Housing 21's Retirement Housing, the profile of Extra Care participants suggests that there has been a slightly under sampling of residents aged less than 55 and has not included any participants aged 95 or over. Despite the concern expressed by Bayer and Tadd (2000) about a tendency for studies to under sample older people it is not considered that the age profile of participants demonstrates a significant age imbalance.



**Figure A5.3: % of Retirement Housing Participants, Residents of Sites (A-K) and Residents of Housing 21's Retirement Housing by Length of Residence**



**Figure A5.4: % of Extra Care Participants, Residents of Sites (1-5) and Residents of Housing 21's Extra Care by Length of Residence**

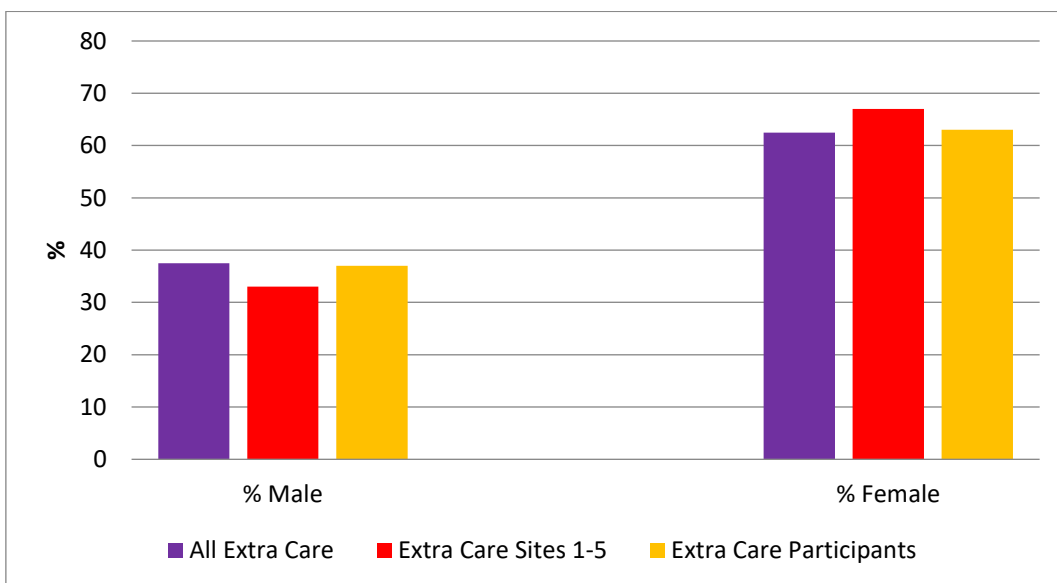


The profile of length of residence of Retirement Housing participants broadly reflects the age profile of Sites A-K and the overall length of occupancy profile of Housing 21's Retirement Housing. The study appears to have under sampled Extra Care residents who have been in occupation for less than 6 months. Whilst the profile of Extra Care participants is otherwise broadly comparable with the length of residence profile for Sites 1-5, these sites under represent residents with longer residence compared with the overall profile for Housing 21's Extra Care. This imbalance is likely to have arisen a consequence of the three largest Extra Care sites in the study having been built in 2015 or 2016 with only the smallest site being over 10 years old.

**Figure A5.5: % of Retirement Housing Participants, Residents of Sites (A-K) and Residents of Housing 21's Retirement Housing by Gender**

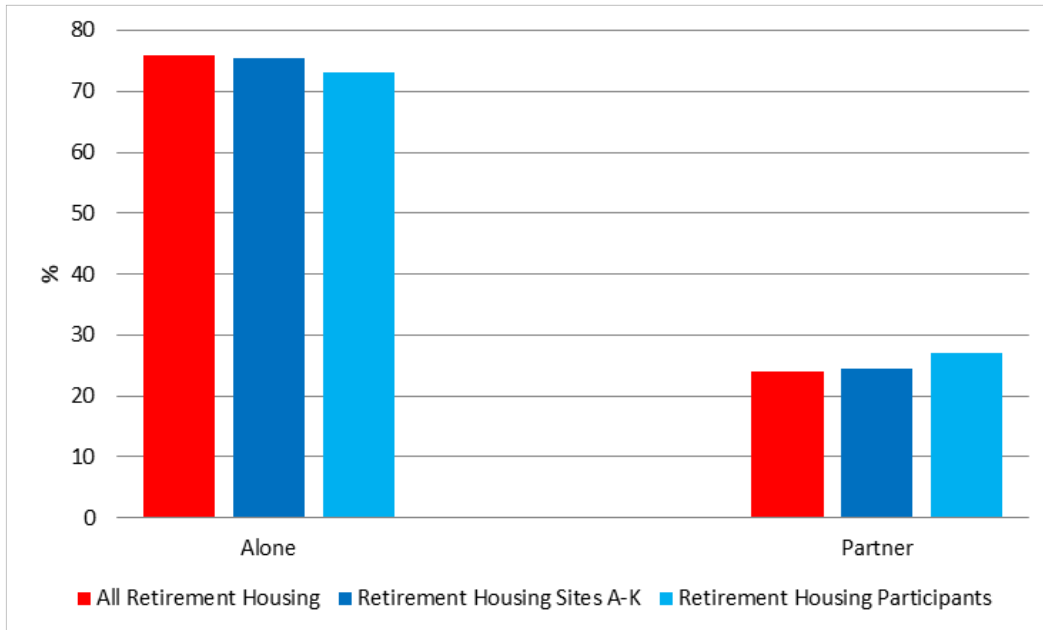


**Figure A5.6: % of Extra Care Participants, Residents of Sites (1-5) and Residents of Housing 21's Extra Care by Gender**

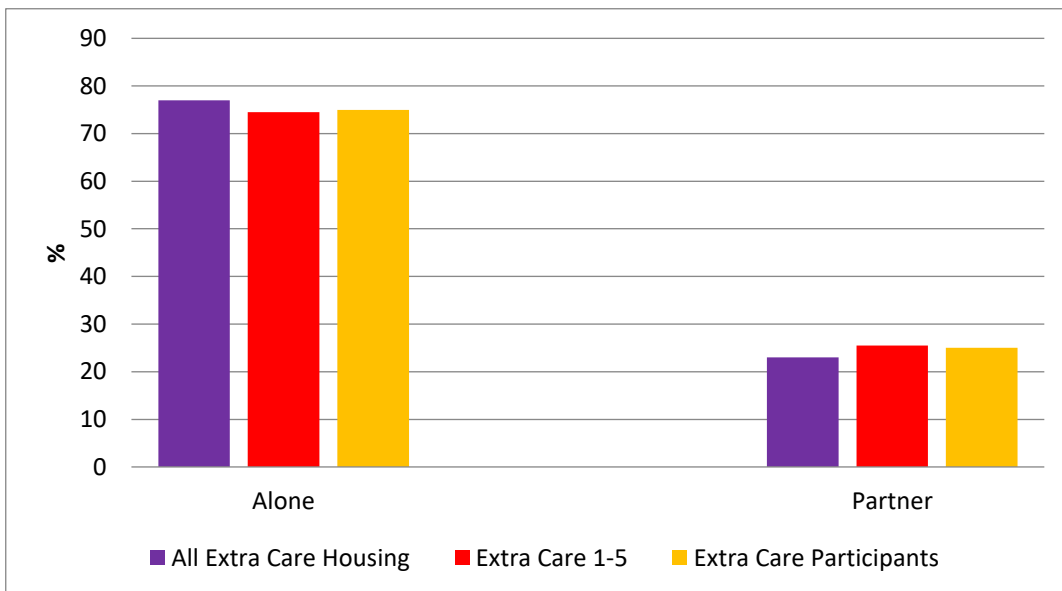


The profile of Retirement Housing participants appears to be slightly weighted towards female participants compared with the gender profile of Sites A-K and the overall profile of Housing 21's Retirement Housing. The gender profile of Extra Care participants is in line with the overall gender profile across Housing 21's Extra Care provision.

**Figure A5.7: % of Retirement Housing Participants, Residents of Sites (A-K) and Residents of Housing 21's Retirement Housing Living Alone or with a Partner**



**Figure A5.8: % of Extra Care Participants, Residents of Sites (1-5) and Residents of Housing 21's Extra Care Living Alone or with a Partner**

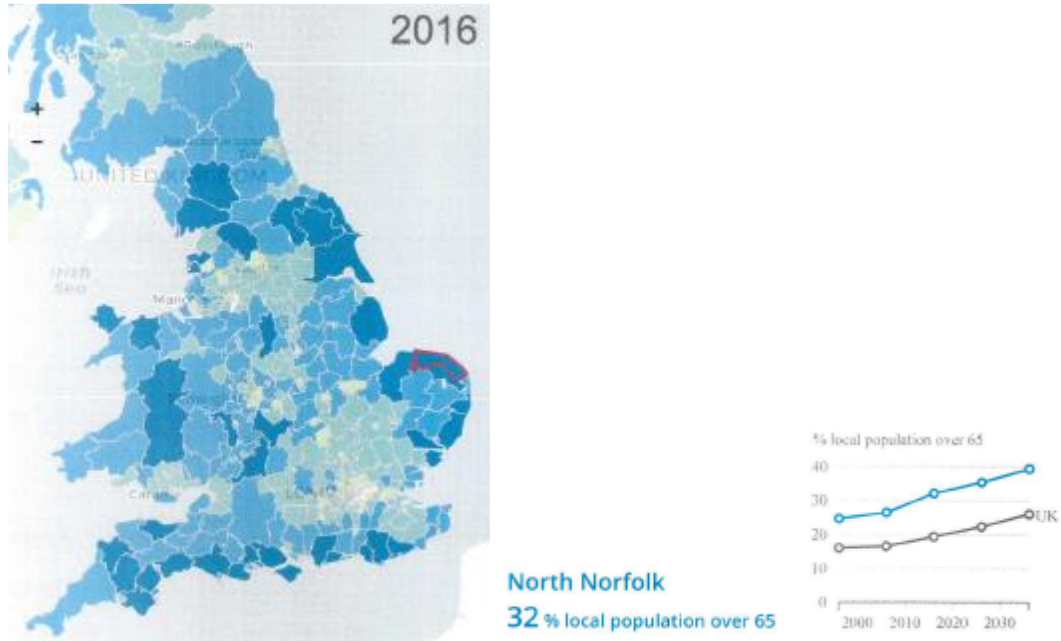


The participant profile for Retirement Housing and Extra Care appears to broadly reflect the proportions of those living alone or with a partner across the sites in the study and Housing 21 as a whole.

# Retirement Housing Site A

East (North Norfolk)

In 2016 North Norfolk had 32% of its population aged over 65 (above the national average of 19%).



27 properties (5 x Studio 1 Person; 6 x 1Bed 1 Person Flat; 14 x 1 Bed 2 Person Flat; 1 x 2 Bed 3 Person Flat; 1 x 2+ Bed ex-Court Manager Flat)  
All Social Rent

Built 1976 (Kitchens replaced 2007; Bathrooms replaced 2013)

Communal Lounge, Laundry and Guest Room  
Appello Careline (Non-Digital) Call System  
Communal Oil Boiler  
1 Lift

Part-Time Non-Resident Court Manager

10 residents from Site A participated in the study

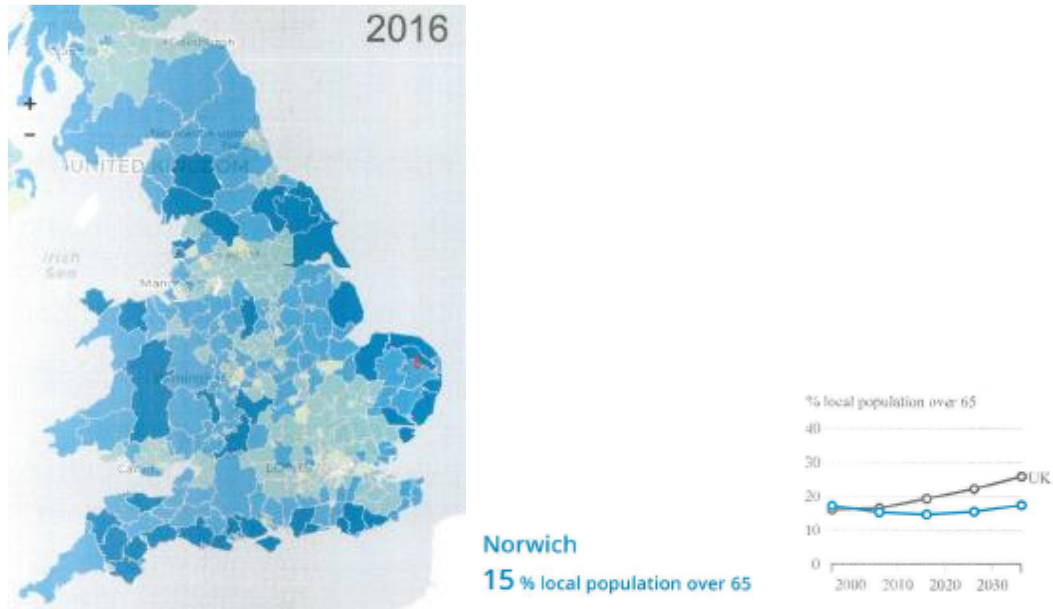
Participant	Age	Gender	Living Alone or with Partner	Length of Residence
RH Site A Res 1	75-85	F	ALONE	5 TO 10 YEARS
RH Site A Res 2	65-75	F	ALONE	5 TO 10 YEARS
RH Site A Res 3	65-75	F	PARTNER	5 TO 10 YEARS
RH Site A Res 4	65-75	F	ALONE	5 TO 10 YEARS
RH Site A Res 5	65-75	F	ALONE	5 TO 10 YEARS
RH Site A Res 6	85-95	F	ALONE	10+ YEARS
RH Site A Res 7	65-75	M	ALONE	2 TO 3 YEARS
RH Site A Res 8	65-75	F	ALONE	6 MTHS TO 1 YEAR
RH Site A Res 9	85-95	F	ALONE	5 TO 10 YEARS
RH Site A Res 10	65-75	M	ALONE	5 TO 10 YEARS



## Retirement Housing Site B

East (Norwich)

In 2016 Norwich had 15% of its population aged over 65 (below the national average of 19%).



43 properties (14 x Studio 1 Person; 28 x 1 Bed 2 Person Flat; 1 x 2+ Bed ex-Court Manager Flat)

All Social Rent

Built 1979 (Kitchens replaced 2007; Bathrooms replaced 2015)

Communal Lounge, Laundry and Guest Room

Appello Careline (Non-Digital) Call System

Communal Gas Boiler

Full-Time Non-Resident Court Manager plus Part-Time Non-Resident Assistant Court Manager

18 residents from Site B participated in the study

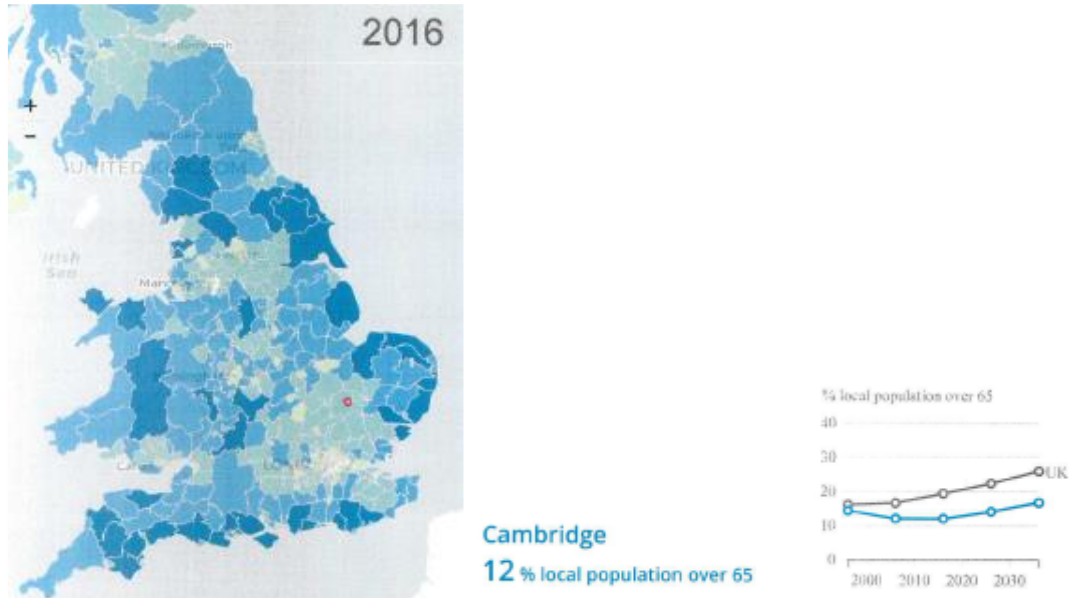
Participant	Age	Gender	Living Alone or with Partner	Length of Residence
RH Site B Res 1	75-85	F	ALONE	10+ YEARS
RH Site B Res 2	85-95	F	ALONE	3 TO 5 YEARS
RH Site B Res 3	65-75	F	PARTNER	1 TO 2 YEARS
RH Site B Res 4	95-105	M	ALONE	10+ YEARS
RH Site B Res 5	55-65	F	ALONE	1 TO 2 YEARS
RH Site B Res 6	95-105	F	ALONE	10+ YEARS
RH Site B Res 7	75-85	F	ALONE	10+ YEARS
RH Site B Res 8	75-85	F	ALONE	3 TO 5 YEARS
RH Site B Res 9	75-85	M	PARTNER	10+ YEARS
RH Site B Res 10	55-65	F	ALONE	1 TO 2 YEARS
RH Site B Res 11	85-95	M	ALONE	3 TO 5 YEARS
RH Site B Res 12	85-95	F	ALONE	10+ YEARS
RH Site B Res 13	65-75	M	PARTNER	1 TO 2 YEARS
RH Site B Res 14	75-85	F	ALONE	6 MTHS TO 1 YEAR
RH Site B Res 15	65-75	F	ALONE	1 TO 2 YEARS
RH Site B Res 16	55-65	F	ALONE	2 TO 3 YEARS
RH Site B Res 17	65-75	F	PARTNER	10+ YEARS
RH Site B Res 18	75-85	M	ALONE	5 TO 10 YEARS



# Retirement Housing Site C

East (Cambridge)

In 2016 Cambridge had 12% of its population aged over 65 (below the national average of 19%).



27 properties (9 x Studio 1 Person; 16 x 1 Bed 2 Person Flat; 2 x 2 Bed 3 Person Flat)  
All Social Rent

Built 1973 (Kitchens replaced 1990; Bathrooms replaced 2013)

Communal Lounge, Laundry and Guest Room  
Appello Careline (Non-Digital) Call System  
Communal Gas Boiler

Part-Time Non-Resident Court Manager



9 residents from Ste C participated in the study

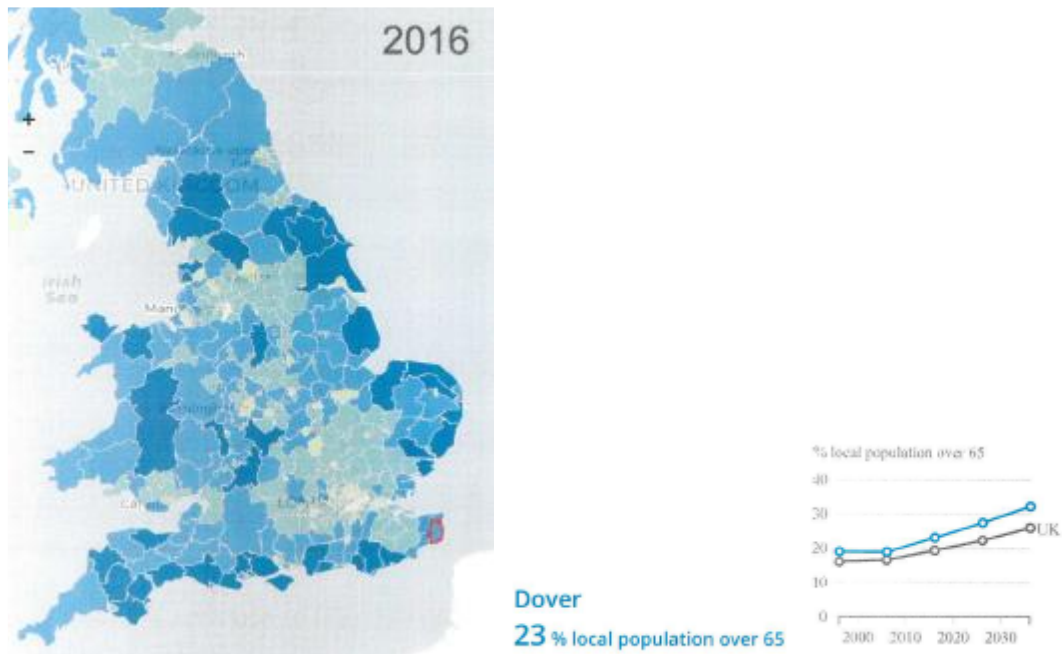
Participant	Age	Gender	Living Alone or with Partner	Length of Residence
RH Site C Res 1	55-65	F	ALONE	3 TO 5 YEARS
RH Site C Res 2	85-95	M	ALONE	2 TO 3 YEARS
RH Site C Res 3	55-65	M	ALONE	UNDER 6 MONTHS
RH Site C Res 4	65-75	M	ALONE	6 MTHS TO 1 YEAR
RH Site C Res 5	65-75	M	PARTNER	6 MTHS TO 1 YEAR
RH Site C Res 6	55-65	F	PARTNER	6 MTHS TO 1 YEAR
RH Site C Res 7	55-65	F	ALONE	5 TO 10 YEARS
RH Site C Res 8	75-85	M	ALONE	UNDER 6 MONTHS
RH Site C Res 9	75-85	F	ALONE	3 TO 5 YEARS



# Retirement Housing Site D

South East (Dover)

In 2016 Dover had 23% of its population aged over 65 (above the national average of 19%).



49 properties (15 x Studio 1 Person; 1 x 1 Bed 1 Person Flat; 31 x 1 Bed 2 Person Flat; 1 x 2 Bed 3 Person Flat; 1 x 2+ Bed ex-Court Manager Flat)

All Social Rent

Built 1982 (Kitchens replaced 2015; Bathrooms replaced 2015)

Communal Lounge, Laundry and Guest Room

Appello Careline (Digital) Call System

Communal Gas Boiler

1 Lift

Full-Time Non-Resident Court Manager

16 residents from Site D participated in the study

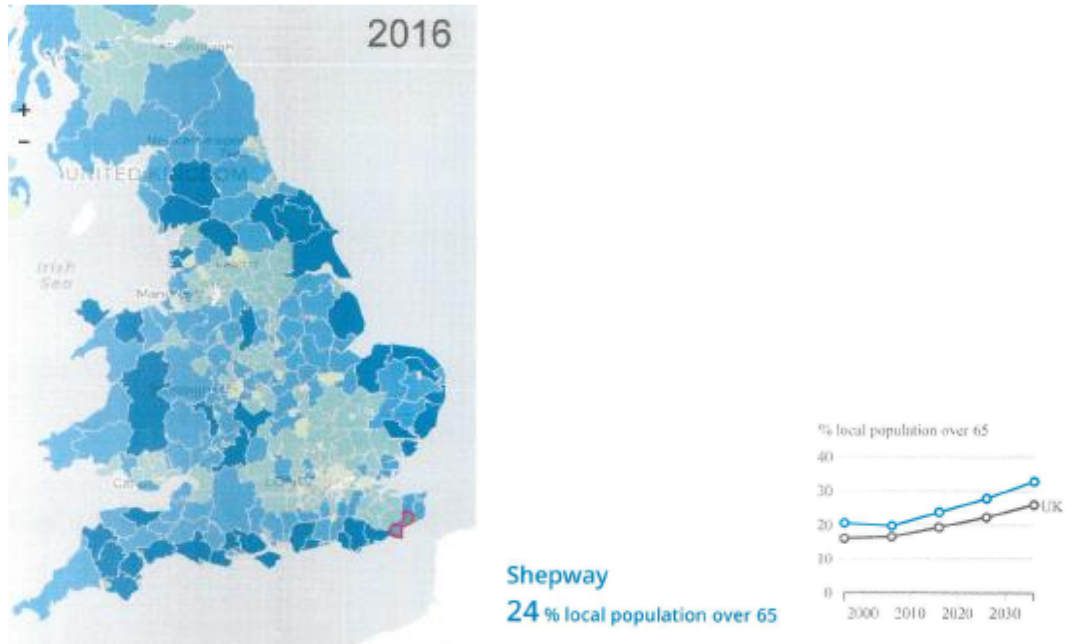
Participant	Age	Gender	Living Alone or with Partner	Length of Residence
RH Site D Res 1	55-65	F	ALONE	3 TO 5 YEARS
RH Site D Res 2	65-75	F	ALONE	1 TO 2 YEARS
RH Site D Res 3	65-75	F	ALONE	1 TO 2 YEARS
RH Site D Res 4	85-95	M	ALONE	3 TO 5 YEARS
RH Site D Res 5	65-75	F	PARTNER	10+ YEARS
RH Site D Res 6	75-85	M	PARTNER	10+ YEARS
RH Site D Res 7	75-85	F	ALONE	5 TO 10 YEARS
RH Site D Res 8	65-75	F	ALONE	UNDER 6 MONTHS
RH Site D Res 9	65-75	F	ALONE	1 TO 2 YEARS
RH Site D Res 10	75-85	M	ALONE	10+ YEARS
RH Site D Res 11	65-75	M	ALONE	1 TO 2 YEARS
RH Site D Res 12	65-75	F	ALONE	UNDER 6 MONTHS
RH Site D Res 13	85-95	F	ALONE	10+ YEARS
RH Site D Res 14	55-65	F	ALONE	3 TO 5 YEARS
RH Site D Res 15	75-85	F	ALONE	5 TO 10 YEARS
RH Site D Res 16	85-95	F	ALONE	1 TO 2 YEARS



# Retirement Housing Site E

South East (Folkestone and Hythe - previously Shepway)

In 2016 Shepway had 24% of its population aged over 65 (above the national average of 19%).



30 properties (14 x 1 Bed 1 Person Flat; 16 x 1 Bed 2 Person Flat)  
All Social Rent

Built 1973 (Kitchens replaced 2003; Bathrooms replaced 2009)

Communal Lounge, Laundry and Guest Room  
Appello Careline (Non-Digital) Call System  
Electric Heaters  
1 Lift

Full-Time Resident Court Manager

9 residents from Site E participated in the study

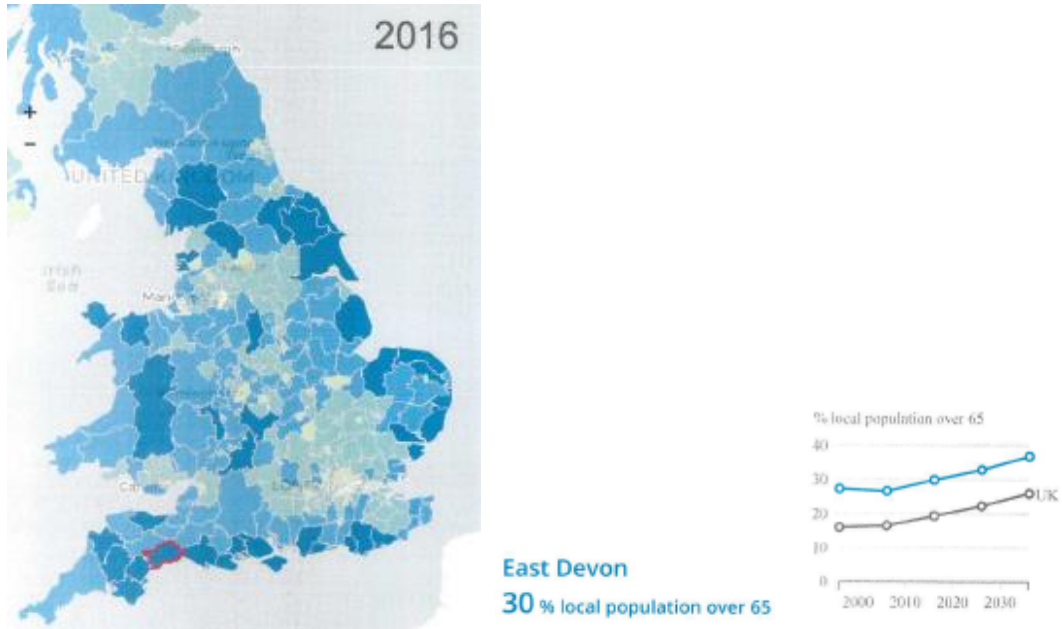
Participant	Age	Gender	Living Alone or with Partner	Length of Residence
RH Site E Res 1	65-75	F	ALONE	2 TO 3 YEARS
RH Site E Res 2	85-95	F	ALONE	10+ YEARS
RH Site E Res 3	85-95	F	ALONE	10+ YEARS
RH Site E Res 4	85-95	F	ALONE	10+ YEARS
RH Site E Res 5	85-95	F	ALONE	10+ YEARS
RH Site E Res 6	85-95	F	ALONE	10+ YEARS
RH Site E Res 7	75-85	M	ALONE	10+ YEARS
RH Site E Res 8	65-75	F	PARTNER	5 TO 10 YEARS
RH Site E Res 9	75-85	M	ALONE	10+ YEARS



# Retirement Housing Site F

South West (East Devon)

In 2016 East Devon had 30% of its population aged over 65 (above the national average of 19%).



43 properties (7 x Studio 1 Person; 10 x 1 Bed 1 Person Flat; 26 x 1 Bed 2 Person Flat)  
All Social Rent

Built 1978 (Kitchens replaced 2006; Bathrooms replaced 2009)

Communal Lounge, Laundry and Guest Room  
Appello Careline (Digital) Call System  
Electric Heaters

Full-Time Resident Court Manager



21 residents from Site F participated in the study

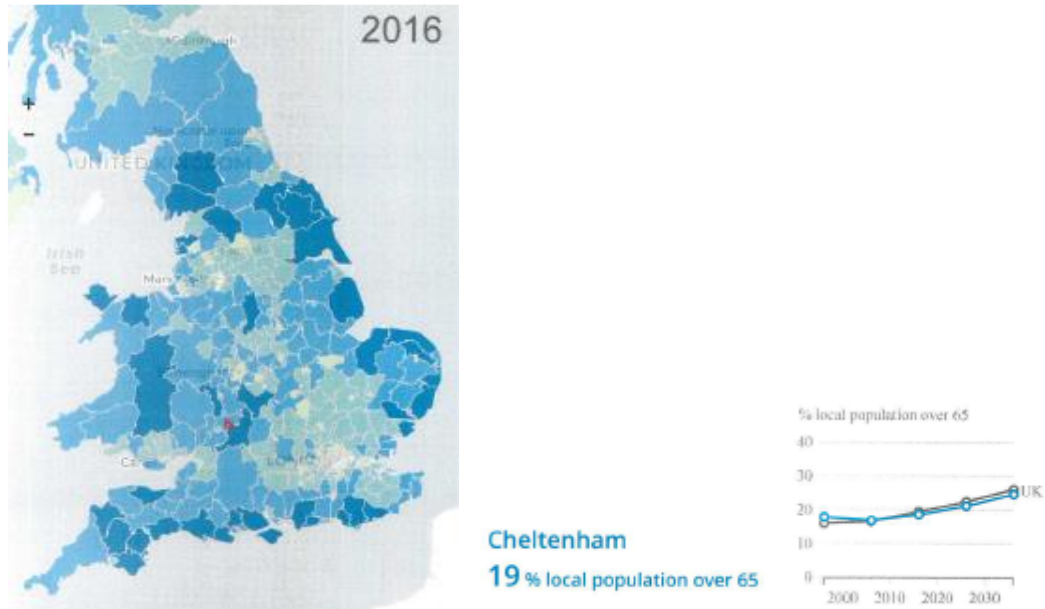
Participant	Age	Gender	Living Alone or with Partner	Length of Residence
RH Site F Res 1	75-85	F	PARTNER	5 TO 10 YEARS
RH Site F Res 2	65-75	M	PARTNER	5 TO 10 YEARS
RH Site F Res 3	65-75	F	PARTNER	5 TO 10 YEARS
RH Site F Res 4	65-75	M	PARTNER	5 TO 10 YEARS
RH Site F Res 5	75-85	M	PARTNER	10+ YEARS
RH Site F Res 6	75-85	F	PARTNER	10+ YEARS
RH Site F Res 7	55-65	M	PARTNER	3 TO 5 YEARS
RH Site F Res 8	75-85	M	PARTNER	5 TO 10 YEARS
RH Site F Res 9	55-65	F	PARTNER	2 TO 3 YEARS
RH Site F Res 10	65-75	F	PARTNER	5 TO 10 YEARS
RH Site F Res 11	75-85	M	PARTNER	5 TO 10 YEARS
RH Site F Res 12	65-75	F	PARTNER	5 TO 10 YEARS
RH Site F Res 13	65-75	F	ALONE	10+ YEARS
RH Site F Res 14	65-75	M	PARTNER	5 TO 10 YEARS
RH Site F Res 15	75-85	M	PARTNER	2 TO 3 YEARS
RH Site F Res 16	75-85	F	ALONE	1 TO 2 YEARS
RH Site F Res 17	65-75	F	PARTNER	3 TO 5 YEARS
RH Site F Res 18	85-95	M	PARTNER	10+ YEARS
RH Site F Res 19	75-85	F	PARTNER	10+ YEARS
RH Site F Res 20	75-85	M	PARTNER	3 TO 5 YEARS
RH Site F Res 21	65-75	F	PARTNER	3 TO 5 YEARS



## Retirement Housing Site G

South West (Cheltenham)

In 2016 Cheltenham had 19% of its population aged over 65 (the same as the national average).



33 properties (8 x Studio 1 Person; 4 x 1 Bed 1 Person Flat; 18 x 1 Bed 2 Person Flat; 2 x 2 Bed 3 Person Flat; 1 x 2+ Bed ex-Court Manager Flat)  
All Social Rent

Built 1978 (Kitchens replaced 2001; Bathrooms replaced 2010)

Communal Lounge, Laundry and Guest Room  
Appello Careline (Digital) Call System  
Electric Heaters

Full-Time Non-Resident Court Manager



13 residents from Site G participated in the study

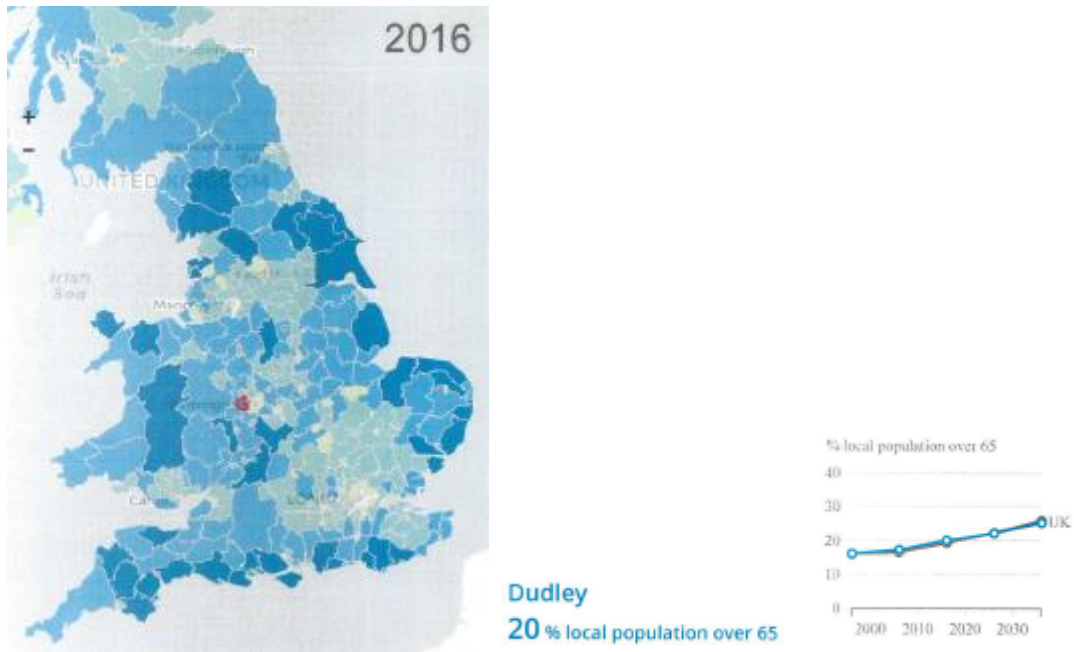
Participant	Age	Gender	Living Alone or with Partner	Length of Residence
RH Site G Res 1	55-65	M	ALONE	3 TO 5 YEARS
RH Site G Res 2	65-75	F	ALONE	6 MTHS TO 1 YEAR
RH Site G Res 3	65-75	F	ALONE	2 TO 3 YEARS
RH Site G Res 4	85-95	F	ALONE	5 TO 10 YEARS
RH Site G Res 5	65-75	F	ALONE	10+ YEARS
RH Site G Res 6	75-85	F	ALONE	UNDER 6 MONTHS
RH Site G Res 7	75-85	M	ALONE	5 TO 10 YEARS
RH Site G Res 8	65-75	M	ALONE	2 TO 3 YEARS
RH Site G Res 9	95-105	F	ALONE	10+ YEARS
RH Site G Res 10	75-85	M	ALONE	10+ YEARS
RH Site G Res 11	75-85	F	ALONE	1 TO 2 YEARS
RH Site G Res 12	75-85	M	ALONE	10+ YEARS
RH Site G Res 13	75-85	F	PARTNER	10+ YEARS



# Retirement Housing Site H

West Midlands (Dudley)

In 2016 Dudley had 20% of its population aged over 65 (above the national average of 19%).



86 properties (20 x Studio 1 Person; 18 x 1 Bed 1 Person Flat; 45 x 1 Bed 2 Person Flat; 2 x 2 Bed 3 Person Flat; 1 x 2+ Bed ex-Court Manager Flat)  
All Social Rent

Built 1984 (Kitchens replaced 2016; Bathrooms replaced 2016)

Communal Lounges, Day Care Centre with Catering; Hair Salon and Guest Room  
Appello Careline (Digital) Call System  
Communal Gas Boiler  
1 Lift

Full-Time Non-Resident Court Manager plus Full-Time Non-Resident Assistant Court Manager



14 residents from Site H participated in the study

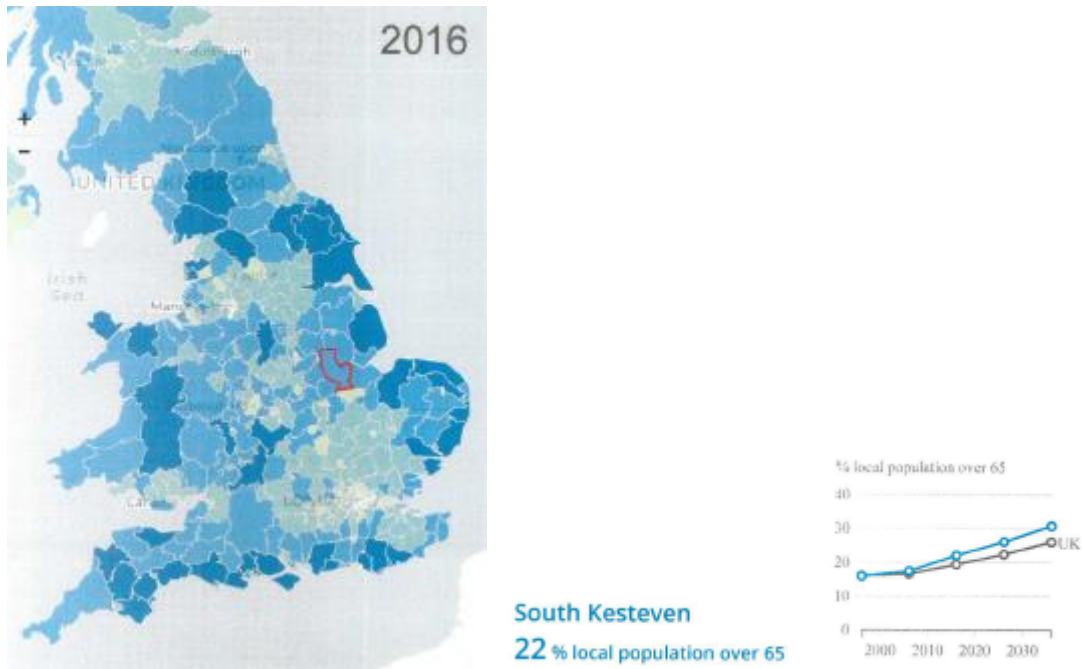
Participant	Age	Gender	Living Alone or with Partner	Length of Residence
RH Site H Res 1	75-85	M	ALONE	5 TO 10 YEARS
RH Site H Res 2	75-85	F	ALONE	3 TO 5 YEARS
RH Site H Res 3	85-95	F	ALONE	2 TO 3 YEARS
RH Site H Res 4	75-85	F	ALONE	UNDER 6 MONTHS
RH Site H Res 5	85-95	F	PARTNER	5 TO 10 YEARS
RH Site H Res 6	85-95	M	PARTNER	5 TO 10 YEARS
RH Site H Res 7	75-85	F	ALONE	5 TO 10 YEARS
RH Site H Res 8	65-75	F	ALONE	UNDER 6 MONTHS
RH Site H Res 9	75-85	F	ALONE	1 TO 2 YEARS
RH Site H Res 10	75-85	F	ALONE	3 TO 5 YEARS
RH Site H Res 11	85-95	M	ALONE	10+ YEARS
RH Site H Res 12	75-85	M	PARTNER	1 TO 2 YEARS
RH Site H Res 13	75-85	F	PARTNER	1 TO 2 YEARS
RH Site H Res 14	75-85	F	ALONE	UNDER 6 MONTHS



# Retirement Housing Site I

East Midlands (South Kesteven)

In 2016 South Kesteven had 22% of its population aged over 65 (above the national average of 19%).



24 properties (20 x Studio 1 Person; 4 x 1 Bed 2 Person Flat)  
All Social Rent

Built 1973 (Kitchens replaced 2003; Bathrooms replaced 2009)

Communal Lounge, Laundry and Guest Room  
Appello Careline (Non-Digital) Call System  
Individual Gas Boilers  
1 Lift

Part-Time Non-Resident Court Manager

10 residents from Site I participated in the study

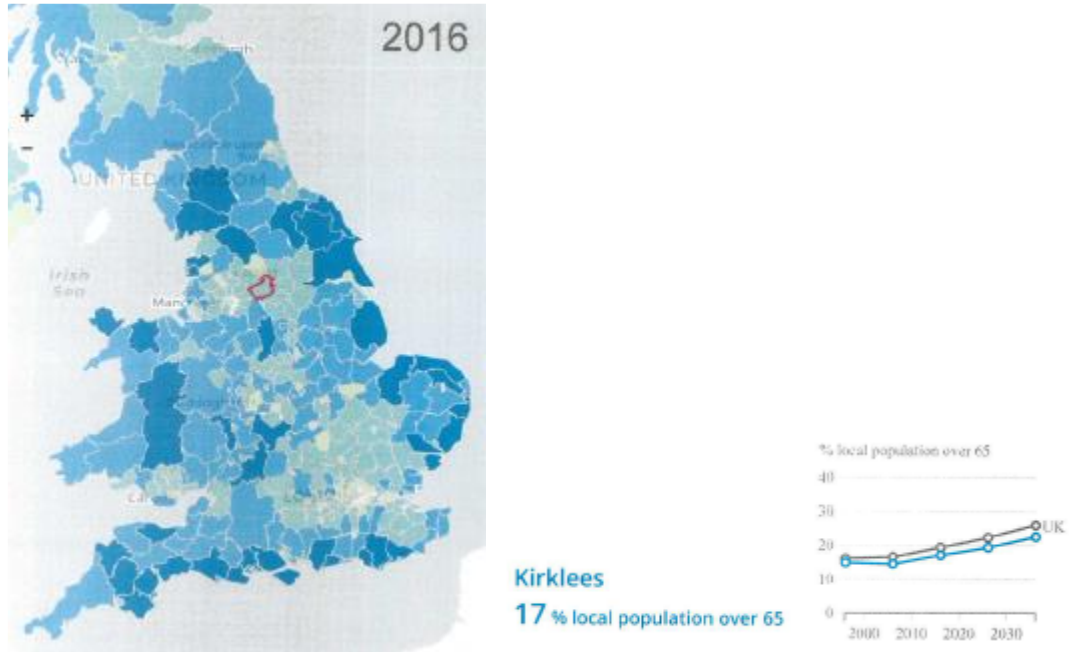
Participant	Age	Gender	Living Alone or with Partner	Length of Residence
RH Site I Res 1	55-65	M	ALONE	6 MTHS TO 1 YEAR
RH Site I Res 2	65-75	M	ALONE	2 TO 3 YEARS
RH Site I Res 3	65-75	M	ALONE	3 TO 5 YEARS
RH Site I Res 4	55-65	F	ALONE	1 TO 2 YEARS
RH Site I Res 5	75-85	M	ALONE	10+ YEARS
RH Site I Res 6	55-65	M	ALONE	UNDER 6 MONTHS
RH Site I Res 7	55-65	M	ALONE	UNDER 6 MONTHS
RH Site I Res 8	65-75	F	ALONE	1 TO 2 YEARS
RH Site I Res 9	85-95	F	ALONE	2 TO 3 YEARS
RH Site I Res 10	65-75	F	ALONE	5 TO 10 YEARS



# Retirement Housing Site J

Yorkshire & Humber (Kirklees)

In 2016 Kirklees had 17% of its population aged over 65 (below the national average of 19%).



67 properties (6 x Studio 1 Person; 59 x 1 Bed 2 Person Flat; 2 x 2+ Bed ex-Court Manager Flat)

All Social Rent

Built 1976 (Kitchens replaced 2000; Bathrooms replaced 2009)

Communal Lounge, Laundry and Guest Room

Appello Careline (Non-Digital) Call System

Communal Gas Boiler

1 Lift

Full-Time Non-Resident Court Manager



24 residents from Site J participated in the study

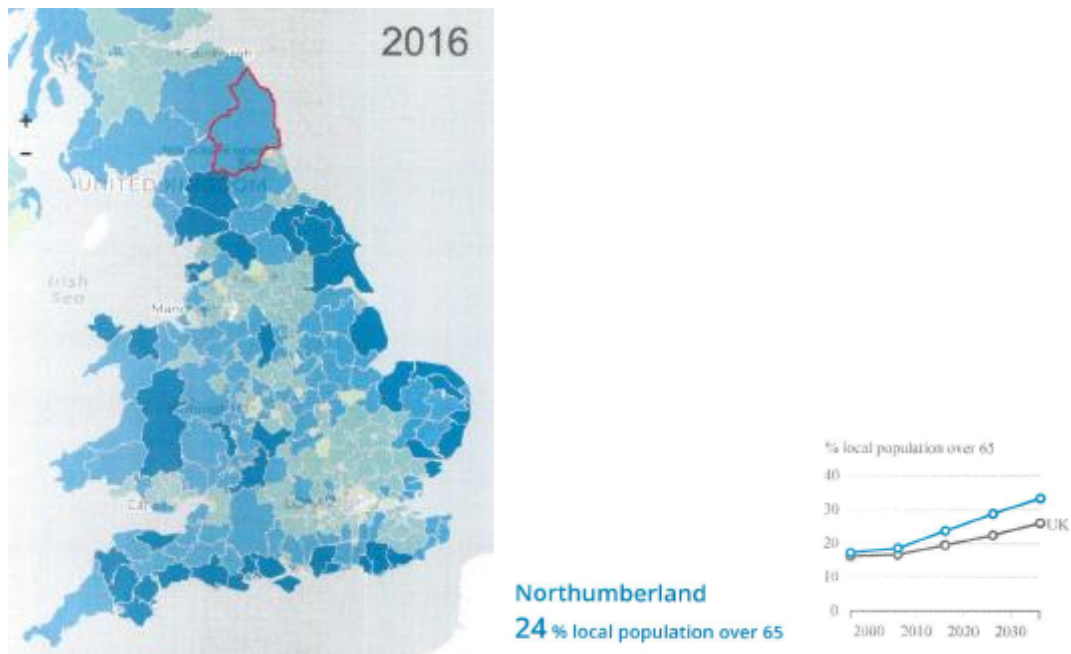
Participant	Age	Gender	Living Alone or with Partner	Length of Residence
RH Site J Res 1	Under 55	M	PARTNER	5 TO 10 YEARS
RH Site J Res 2	65-75	M	PARTNER	3 TO 5 YEARS
RH Site J Res 3	75-85	F	ALONE	2 TO 3 YEARS
RH Site J Res 4	75-85	F	ALONE	1 TO 2 YEARS
RH Site J Res 5	65-75	F	PARTNER	3 TO 5 YEARS
RH Site J Res 6	65-75	F	ALONE	5 TO 10 YEARS
RH Site J Res 7	55-65	F	ALONE	UNDER 6 MONTHS
RH Site J Res 8	55-65	F	ALONE	5 TO 10 YEARS
RH Site J Res 9	55-65	F	ALONE	10+ YEARS
RH Site J Res 10	55-65	M	ALONE	6 MTHS TO 1 YEAR
RH Site J Res 11	55-65	F	ALONE	6 MTHS TO 1 YEAR
RH Site J Res 12	55-65	M	ALONE	6 MTHS TO 1 YEAR
RH Site J Res 13	75-85	M	ALONE	10+ YEARS
RH Site J Res 14	75-85	M	PARTNER	5 TO 10 YEARS
RH Site J Res 15	85-95	F	ALONE	10+ YEARS
RH Site J Res 16	65-75	F	PARTNER	5 TO 10 YEARS
RH Site J Res 17	75-85	F	ALONE	UNDER 6 MONTHS
RH Site J Res 18	85-95	F	ALONE	5 TO 10 YEARS
RH Site J Res 19	75-85	F	ALONE	1 TO 2 YEARS
RH Site J Res 20	55-65	M	ALONE	3 TO 5 YEARS
RH Site J Res 21	65-75	F	ALONE	1 TO 2 YEARS
RH Site J Res 22	65-75	F	PARTNER	1 TO 2 YEARS
RH Site J Res 23	65-75	M	ALONE	3 TO 5 YEARS
RH Site J Res 24	65-75	M	PARTNER	10+ YEARS



## Retirement Housing Site K

North East (Northumberland)

In 2016 Northumberland had 24% of its population aged over 65 (above the national average of 19%).



30 properties (19 x 1 Bed 1 Person Flat; 10 x 1 Bed 2 Person Flat; 1 x 2+ Bed ex-Court Manager Flat)  
All Social Rent

Built 1983 (Kitchens replaced 2013; Bathrooms replaced 2010)

Communal Lounge, Laundry and Guest Room  
Appello Careline (Non-Digital) Call System  
Communal Gas Boiler

Part-Time Non-Resident Court Manager



13 residents from Site K participated in the study

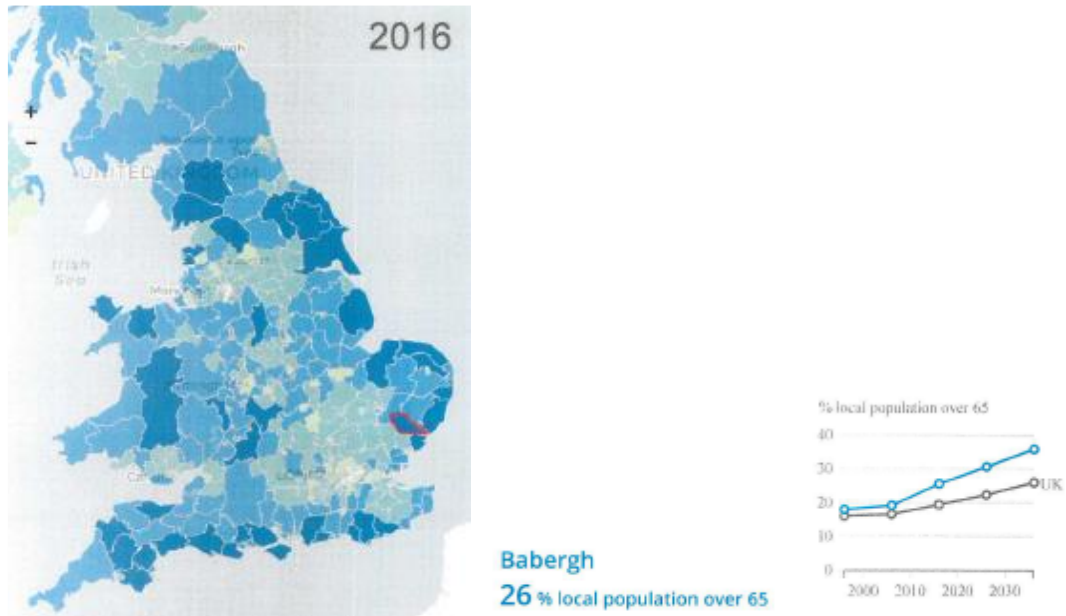
Participant	Age	Gender	Living Alone or with Partner	Length of Residence
RH Site K Res 1	75-85	M	ALONE	1 TO 2 YEARS
RH Site K Res 2	75-85	F	ALONE	2 TO 3 YEARS
RH Site K Res 3	65-75	M	ALONE	3 TO 5 YEARS
RH Site K Res 4	65-75	M	ALONE	UNDER 6 MONTHS
RH Site K Res 5	75-85	M	PARTNER	1 TO 2 YEARS
RH Site K Res 6	65-75	F	PARTNER	1 TO 2 YEARS
RH Site K Res 7	85-95	F	ALONE	3 TO 5 YEARS
RH Site K Res 8	55-65	F	ALONE	UNDER 6 MONTHS
RH Site K Res 9	85-95	F	ALONE	2 TO 3 YEARS
RH Site K Res 10	85-95	F	ALONE	2 TO 3 YEARS
RH Site K Res 11	65-75	F	ALONE	3 TO 5 YEARS
RH Site K Res 12	85-95	F	ALONE	10+ YEARS
RH Site K Res 13	85-95	F	ALONE	5 TO 10 YEARS



# Extra Care Site 1

East (Babergh)

In 2016 Babergh had 26% of its population aged over 65 (above the national average of 19%).



38 properties (30 x 1 Bed 2 Person Flat; 8 x 2 Bed 3 Person Flat)  
All Social Rent

Built – 2004 (Original Kitchens and Bathrooms)

Electric heating

Communal Lounges, On-Site Restaurant, Day Care Centre, Laundry, Assisted Bathing, Hair Salon and Guest Room

Appello Careline (Non-Digital) Call System, Lifts

Non-Resident Housing and Care Manager plus Assistant Housing Manager and Care Manager

Care provided by Housing & Care 21 (400 hours of care/week)



15 residents from Site 1 participated in the study

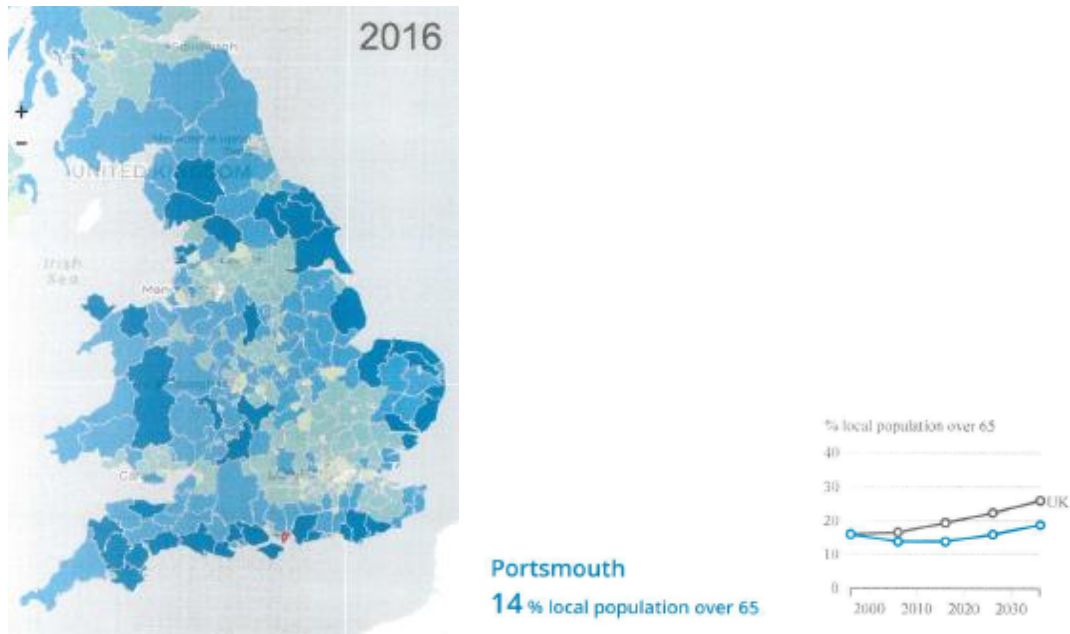
Participant	Age	Gender	Living Alone or with Partner	Length of Residence
EC Site 1 Res 1	85-95	F	ALONE	6 MTHS TO 1 YEAR
EC Site 1 Res 2	85-95	F	ALONE	6 MTHS TO 1 YEAR
EC Site 1 Res 3	85-95	M	ALONE	6 MTHS TO 1 YEAR
EC Site 1 Res 4	85-95	F	ALONE	2 TO 3 YEARS
EC Site 1 Res 5	85-95	M	ALONE	5 TO 10 YEARS
EC Site 1 Res 6	85-95	F	ALONE	1 TO 2 YEARS
EC Site 1 Res 7	75-85	M	ALONE	6 MTHS TO 1 YEAR
EC Site 1 Res 8	85-95	F	ALONE	6 MTHS TO 1 YEAR
EC Site 1 Res 9	85-95	F	ALONE	5 TO 10 YEARS
EC Site 1 Res 10	85-95	F	PARTNER	UNDER 6 MONTHS
EC Site 1 Res 11	75-85	F	ALONE	6 MTHS TO 1 YEAR
EC Site 1 Res 12	85-95	F	ALONE	1 TO 2 YEARS
EC Site 1 Res 13	75-85	M	ALONE	6 MTHS TO 1 YEAR
EC Site 1 Res 14	85-95	M	ALONE	1 TO 2 YEARS
EC Site 1 Res 15	85-95	F	ALONE	2 TO 3 YEARS



## Extra Care Site 2

South East (Portsmouth)

In 2016 Portsmouth had 14% of its population aged over 65 (below the national average of 19%).



80 properties (61 x 1 Bed 2 Person Flat; 19 x 2 Bed 3 Person Flat)  
All Affordable Rent

Built 2015 (Original Kitchens and Bathrooms)

Communal Gas Boiler

Communal Lounges, On-Site Restaurant, Laundry, Assisted Bathing, Hair Salon and Guest Room

Appello Careline (Non-Digital) Call System

Lifts

Full-Time Non-Resident Manager plus Full-Time Non-Resident Assistant Manager

Care provided by Third Party Care Organisation



9 residents from Site 2 participated in the study

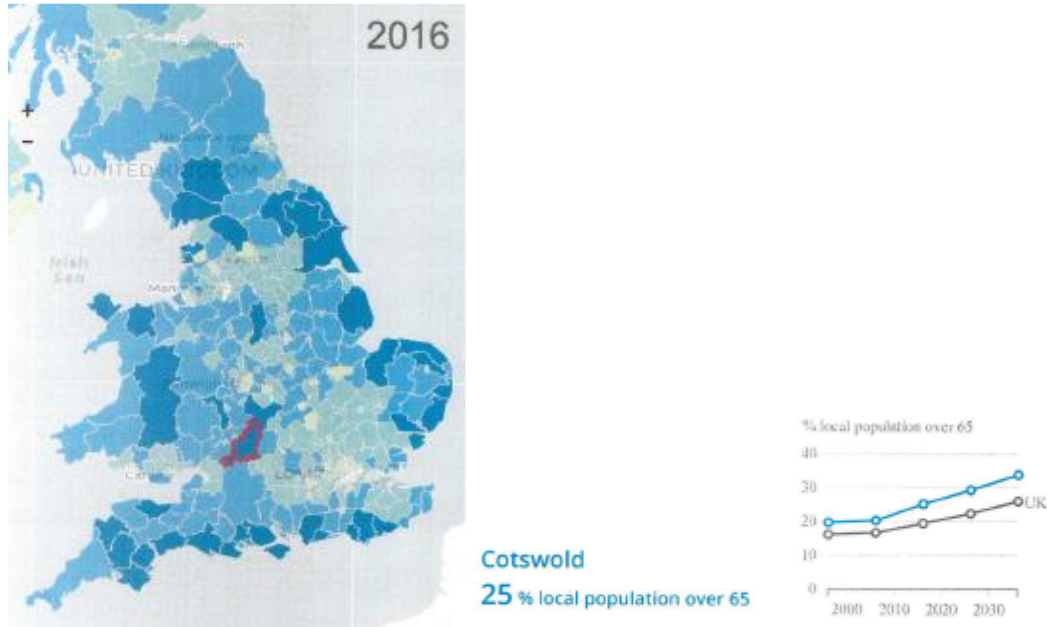
Participant	Age	Gender	Living Alone or with Partner	Length of Residence
EC Site 2 Res 1	75-85	F	ALONE	3 TO 5 YEARS
EC Site 2 Res 2	65-75	F	ALONE	3 TO 5 YEARS
EC Site 2 Res 3	75-85	F	ALONE	3 TO 5 YEARS
EC Site 2 Res 4	55-65	M	ALONE	1 TO 2 YEARS
EC Site 2 Res 5	65-75	M	ALONE	3 TO 5 YEARS
EC Site 2 Res 6	55-65	M	PARTNER	3 TO 5 YEARS
EC Site 2 Res 7	65-75	M	PARTNER	2 TO 3 YEARS
EC Site 2 Res 8	65-75	F	PARTNER	2 TO 3 YEARS
EC Site 2 Res 9	Under 55	M	ALONE	6 MTHS TO 1 YEAR



## Extra Care Site 3

South West (Cotswold)

In 2016 Cotswold had 25% of its population aged over 65 (above the national average of 19%).



60 properties (20 x 1 Bed 2 Person Flat; 40 x 2 Bed £ Person Flat) All Affordable Rent

Built 2011

Communal Lounges, On-Site Restaurant, Laundry, Assisted Bathing, Hair Salon and Guest Room

Appello Careline (Non-Digital) Call System

Communal Gas Boiler

Lifts

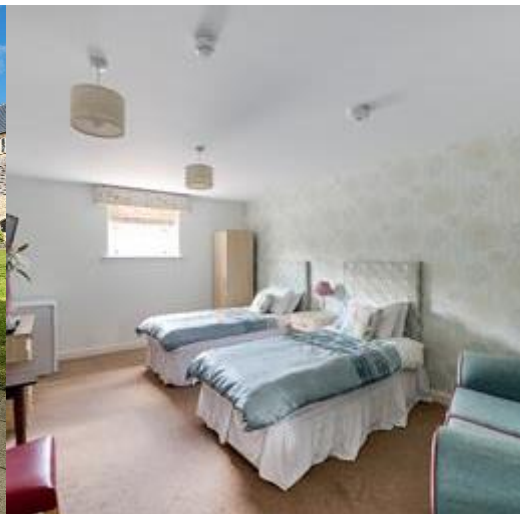
Non-Resident Housing and Care Manager plus Assistant Housing Manager and Care Manager

Care provided by Housing & Care 21 (500 hours of care/week)



14 residents from Site 3 participated in the study

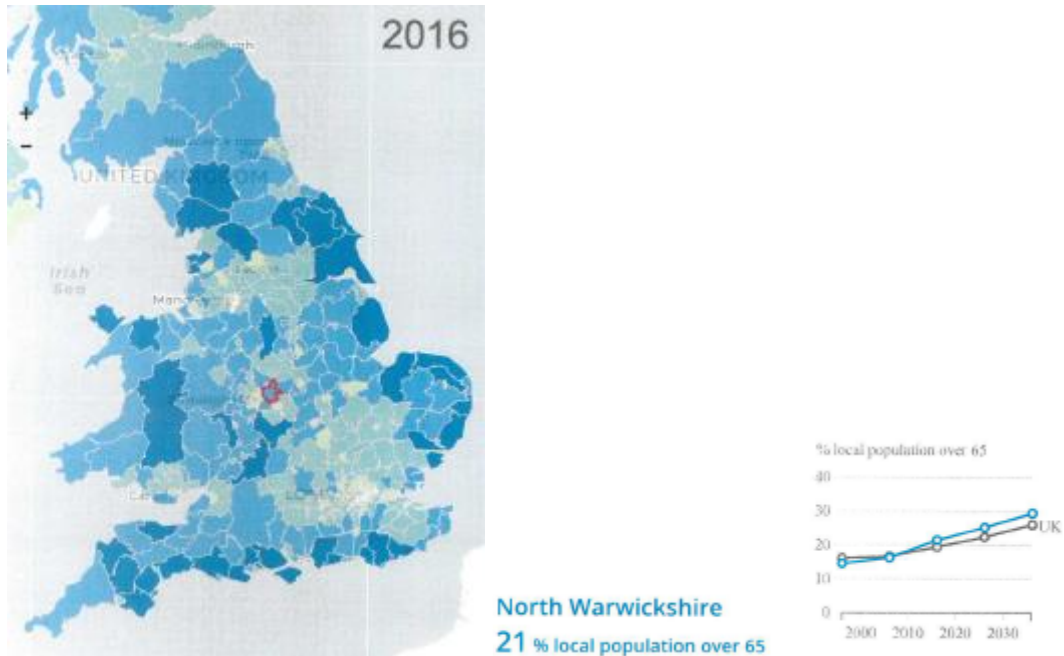
Participant	Age	Gender	Living Alone or with Partner	Length of Residence
EC Site 3 Res 1	65-75	F	ALONE	2 TO 3 YEARS
EC Site 3 Res 2	65-75	F	PARTNER	5 TO 10 YEARS
EC Site 3 Res 3	85-95	F	ALONE	2 TO 3 YEARS
EC Site 3 Res 4	75-85	M	ALONE	UNDER 6 MONTHS
EC Site 3 Res 5	65-75	F	ALONE	3 TO 5 YEARS
EC Site 3 Res 6	85-95	M	ALONE	1 TO 2 YEARS
EC Site 3 Res 7	75-85	F	ALONE	1 TO 2 YEARS
EC Site 3 Res 8	85-95	F	ALONE	UNDER 6 MONTHS
EC Site 3 Res 9	65-75	F	ALONE	5 TO 10 YEARS
EC Site 3 Res 10	85-95	M	PARTNER	1 TO 2 YEARS
EC Site 3 Res 11	75-85	F	PARTNER	1 TO 2 YEARS
EC Site 3 Res 12	85-95	F	ALONE	5 TO 10 YEARS
EC Site 3 Res 13	65-75	M	PARTNER	5 TO 10 YEARS
EC Site 3 Res 14	75-85	F	ALONE	2 TO 3 YEARS



## Extra Care Site 4

West Midlands (North Warwickshire)

In 2016 North Warwickshire had 21% of its population aged over 65 (above the national average of 19%).



70 properties (70 x 2 Bed 3 Person Flat) All Affordable Rent

Built 2016

Communal Lounges, On-Site Restaurant, Laundry, Assisted Bathing, Hair Salon and Guest Room

Appello Careline (Non-Digital) Call System

Individual Gas Boilers Lifts

Non-Resident Housing and Care Manager plus Assistant Housing Manager and Care Manager

Care provided by Housing & Care 21 (600 hours of care/week)





9 residents from Site 4 participated in the study.

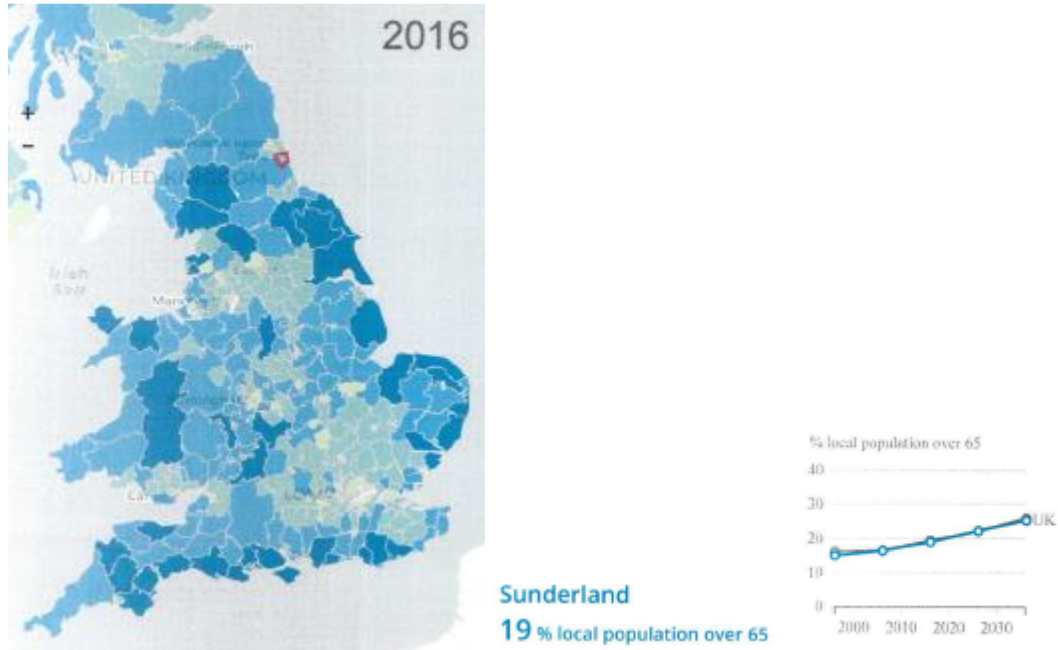
Participant	Age	Gender	Living Alone or with Partner	Length of Residence
EC Site 4 Res 1	85-95	F	ALONE	1 TO 2 YEARS
EC Site 4 Res 2	75-85	F	ALONE	1 TO 2 YEARS
EC Site 4 Res 3	65-75	M	ALONE	6 MTHS TO 1 YEAR
EC Site 4 Res 4	55-65	M	ALONE	1 TO 2 YEARS
EC Site 4 Res 5	55-65	M	ALONE	6 MTHS TO 1 YEAR
EC Site 4 Res 6	85-95	F	ALONE	2 TO 3 YEARS
EC Site 4 Res 7	65-75	M	ALONE	1 TO 2 YEARS
EC Site 4 Res 8	65-75	F	ALONE	1 TO 2 YEARS
EC Site 4 Res 9	85-95	M	ALONE	1 TO 2 YEARS



## Extra Care Site 5

North East (Sunderland)

In 2016 Sunderland had 19% of its population aged over 65 (the same as the national average).



130 properties (31 x 1Bed 2 Person Flat; 69 x 2 Bed 3 Person Flat; 30 x 2 Bed 3 Person Bungalow) 72 Affordable Rent; 58 Shared Ownership

Built 2016

Communal Lounges, On-Site Restaurant, Laundry, Assisted Bathing, Hair Salon and Guest Room

Appello Careline (Non-Digital) Call System

Communal Gas Boiler Lifts

Non-Resident Housing and Care Manager plus Assistant Housing Manager and Care Manager

Care provided by Housing & Care 21 (900 hours of care/week)



21 residents participated in the study

Participant	Age	Gender	Living Alone or with Partner	Length of Residence
EC Site 5 Res 1	75-85	F	ALONE	2 TO 3 YEARS
EC Site 5 Res 2	75-85	F	ALONE	2 TO 3 YEARS
EC Site 5 Res 3 so	55-65	F	ALONE	1 TO 2 YEARS
EC Site 5 Res 4	65-75	F	ALONE	1 TO 2 YEARS
EC Site 5 Res 5 so	65-75	F	PARTNER	2 TO 3 YEARS
EC Site 5 Res 6 so	65-75	M	PARTNER	2 TO 3 YEARS
EC Site 5 Res 7	65-75	M	PARTNER	6 MTHS TO 1 YEAR
EC Site 5 Res 8	55-65	F	PARTNER	6 MTHS TO 1 YEAR
EC Site 5 Res 9	65-75	M	ALONE	6 MTHS TO 1 YEAR
EC Site 5 Res 10	55-65	F	ALONE	2 TO 3 YEARS
EC Site 5 Res 11	85-95	F	PARTNER	2 to 3 YEARS
EC Site 5 Res 12 so	65-75	M	ALONE	2 TO 3 YEARS
EC Site 5 Res 13 so	65-75	F	PARTNER	2 TO 3 YEARS
EC Site 5 Res 14 so	85-95	M	PARTNER	2 TO 3 YEARS
EC Site 5 Res 15 so	65-75	F	ALONE	2 TO 3 YEARS
EC Site 5 Res 16 so	85-95	F	ALONE	1 TO 2 YEARS
EC Site 5 Res 17 so	75-85	F	ALONE	1 TO 2 YEARS
EC Site 5 Res 18 so	65-75	F	PARTNER	2 TO 3 YEARS
EC Site 5 Res 19 so	75-85	M	PARTNER	2 TO 3 YEARS
EC Site 5 Res 20	65-75	F	ALONE	1 TO 2 YEARS
EC Site 5 Res 21	75-85	F	ALONE	1 TO 2 YEARS



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## **Appendix 6**

### **Ethical Approval and Supporting Documents**

*Ethical Approval Letter with Participant Information Sheet, Informed Consent Form and Details of Instructions for Q Methodology provided to potential participants to help ensure informed consent was obtained.*

# Ethical Approval Letter



Downloaded: 09/03/2020  
Approved: 31/05/2018

Bruce Moore  
Registration number: 170128863  
School of Health and Related Research  
Programme: Post Graduate Research (PhD)

Dear Bruce

**PROJECT TITLE:** Research into Priorities and Preferences for Retirement and Extra Care Housing  
**APPLICATION:** Reference Number 019090

On behalf of the University ethics reviewers who reviewed your project, I am pleased to inform you that on 31/05/2018 the above-named project was **approved** on ethics grounds, on the basis that you will adhere to the following documentation that you submitted for ethics review:

- University research ethics application form 019090 (form submission date: 30/05/2018); (expected project end date: 31/07/2020).
- Participant information sheet 1043357 version 5 (30/05/2018).
- Participant information sheet 1045073 version 1 (26/05/2018).
- Participant information sheet 1045072 version 1 (26/05/2018).
- Participant consent form 1043356 version 4 (26/05/2018).

If during the course of the project you need to [deviate significantly from the above-approved documentation](#) please inform me since written approval will be required.

Your responsibilities in delivering this research project are set out at the end of this letter.

Yours sincerely

Jennifer Burr  
Ethics Administrator  
School of Health and Related Research

Please note the following responsibilities of the researcher in delivering the research project:

- The project must abide by the University's Research Ethics Policy: <https://www.sheffield.ac.uk/rs/ethicsandintegrity/ethicspolicy/approval-procedure>
- The project must abide by the University's Good Research & Innovation Practices Policy: [https://www.sheffield.ac.uk/polopoly\\_fs/1.671066!/file/GRIPPolicy.pdf](https://www.sheffield.ac.uk/polopoly_fs/1.671066!/file/GRIPPolicy.pdf)
- The researcher must inform their supervisor (in the case of a student) or Ethics Administrator (in the case of a member of staff) of any significant changes to the project or the approved documentation.
- The researcher must comply with the requirements of the law and relevant guidelines relating to security and confidentiality of personal data.
- The researcher is responsible for effectively managing the data collected both during and after the end of the project in line with best practice, and any relevant legislative, regulatory or contractual requirements.

## Participation Information Sheet



### ***Information Sheet for Research into Priorities and Preferences for Retirement and Extra Care Housing***

*I would like to invite you to take part in a research project to understand what residents like or dislike about living in retirement or extra care housing. It is being undertaken to help to improve the buildings, services and experiences of residents as well as informing future provision and management arrangements.*

*This information sheet is intended to provide you with details about the research project, why it is being undertaken and what it will involve in order to allow you to decide if you are willing to participate. Please take time to read this information and discuss it with your family and friends or others if you wish. If there is anything that is not clear or if you would like more information please let me know.*

#### **What is the purpose of the research?**

This research project is seeking to understand the particular likes and dislikes that different residents may have about retirement housing or extra care housing. It recognises that different people may have different views and opinions. The research is not trying to establish if views are right or wrong, but is seeking to understand the basis for differences in order to discover ways in which the buildings, services and experience of residents might be better focused or improved to address specific priorities and preferences.

The views of residents will also be compared and contrasted with the views of staff members and other professionals to see if they have a consistent or different view of the characteristics and merits of the service being provided.

#### **Where will the research take place?**

This research is being undertaken at a number of Housing & Care 21's retirement housing and extra care sites. These locations have been selected to provide a regional spread of locations across England and to also provide a mix of different site sizes and characteristics.

#### **Do I have to take part?**

You do not need to participate in this research if you do not wish to. If you agree to take part, you will be provided with a consent form to sign to say you understand the nature of the research, what it involves and that you agree to the basis of participation. Even if you sign that form you can still change your mind at any time and stop the process and withdraw from the study without needing to give a reason and without consequence.

## **What will happen if I take part?**

If you do agree to take part I will try to make the process as easy and convenient for you as possible. You will not have to travel, I will try to ensure that the research is done at a time and in a setting that suits you. If this is not possible it may be possible for the research instructions and a set of statements for you to sort to be sent to you by post and for you to return the results to me.

You will be asked to sort a set of around 50 statements about different aspects of retirement housing or extra care and arranging them in a grid pattern to indicate the statements you most agree with and like and those that you most disagree with or dislike. This is to be done according to your own views and based on your own experience.

The statements all reflect comments that have previously been made by Housing & Care 21 residents about what they like, dislike about either retirement housing or extra care and what they want Housing & Care 21 to keep doing, stop or change about the buildings, services provided. I hope that the sorting process will be an interesting, thought provoking and enjoyable experience.

Although the process of reading and sorting 50 statements is not a quick exercise, it is not likely to take more than 40 minutes. However, this is not a timed exercise and you can take whatever time you want or need to complete the process.

## **What are the possible benefits and risks of taking part?**

You will not receive any payment, inducement or other reward for your participation. This project will, however, provide a better understanding of the different desires and expectations from retirement housing and extra care services and how these might be improved.

There are not considered to be any particular risks involved in taking part in this research. You do not have to participate if you do not want to and you can stop and withdraw from the study at any time if you find it difficult or do not want to continue.

## **Will my taking part in this project be kept confidential?**

I will use pseudonyms rather than the real names of resident and staff participants but professional participants will be named and identified as participants in this research.

## **Who will have access to the data and where will it be held?**

Data collected in this research project will be securely stored and kept confidential and not shared with anyone else without your express permission. This will require me to obtain and for you to give your informed consent to the use of the data you provide.

I will not be seeking to obtain any 'sensitive personal data' and I will only collect data and information that is relevant and required for the purpose of this study.



The data will be securely stored in password protected and encrypted computer files. Data will not be sent or shared with anyone else without your express permission. No data will be kept or used beyond 25<sup>th</sup> December 2024.

If you consent to an audio recording of comments you make during the research and sorting process these will only be used to help inform the analysis and illustration of reasons for the choices you made. They will not be broadcast and will be destroyed once comments have been transcribed and captured in a secure computer document. No comments will be attributed to you without your express permission.

## **What will happen to the results of this research?**

The results of the research will form the basis for a doctoral thesis which will be presented and examined by Sheffield University. A copy of the thesis will then be retained and made accessible to others by Sheffield University. The data collected and findings may also be referenced by me in academic journals and publications.

If you participate you may request to be sent a summary of the results of the study prior to publication.

## **General Data Protection Regulations**

In accordance with data protection legislation, I am required to inform you that the legal basis I am applying in order to process your personal data is that 'processing is necessary for the performance of a task carried out in the public interest' (Article 6(1) (e) of the General Data Protection Regulations). The collection of data for this research will only be used for this purpose. The University of Sheffield will act as the Data Controller and will be responsible to ensure that your data is properly used and protected. As the researcher Bruce Moore will be the Data Processor and no other people will have direct access to your data.

Further information on the application of the General Data Protection Regulations is included in Sheffield University's Privacy Notice <https://www.sheffield.ac.uk/govern/data-protection/privacy/general>

If you have any concerns about data protection related to my research these can be addressed to Anne Cutler [A.Cutler@sheffield.ac.uk](mailto:A.Cutler@sheffield.ac.uk) (0114 222 1117) or if necessary the ICO (Information Commission Office).

## **Has the research been reviewed by an ethics committee?**

The research has received ethical approval from Sheffield University's School of Health and Related Research.

## What is the Connection with Housing & Care 21?

I am undertaking this study in my capacity as a PhD student at Sheffield University even though I am also the Chief Executive of Housing & Care 21 and the Board of Housing & Care 21 are supporting me to undertake this study.

I do not want my position as Chief Executive of Housing & Care 21 to create any impression of pressure or compulsion to participate in this study. As indicated above, participation is entirely voluntary and no special treatment or privileges will be shown to either those who do or do not take part.

## What if something goes wrong?

If you have any questions, comments or complaints about the conduct of the research these can be raised with me at any time or if you would feel uncomfortable raising them with me you can contact either of my supervisors (Sarah Barnes: [s.barnes@sheffield.ac.uk](mailto:s.barnes@sheffield.ac.uk), David Robinson: [david.robinson@sheffield.ac.uk](mailto:david.robinson@sheffield.ac.uk)). If having done so you are still not satisfied with the response you can contact John Brazier, Dean of the School of Health and Related Research, University of Sheffield, Regent Court, 30 Regent Street, Sheffield, S1 4ED. Tel: 0114 222 5453.

If you have any questions about the research I can be contacted at [Bmoore4@sheffield.ac.uk](mailto:Bmoore4@sheffield.ac.uk) [07713 085047](tel:07713085047)

and at the following address:

Bruce Moore

 School of Health and Related Research

Sheffield University

Regents Court, 30 Regent Street

Sheffield

S1 4DA

## Thank You

Thank you for reading this. I hope you will be willing and able to participate in my research project.

**Bruce Moore**

## Participant Consent Forms



### **Participant Consent Form for Research into Priorities and Preferences for Retirement and Extra Care Housing**

Residents and Staff

Title of Research Project:

**Study to understand what residents do or don't like or want from retirement and extra care housing.**

Name of Researcher:

**Bruce Moore PhD Student - School of Health and Related Research, Sheffield University**

[Bmoore4@sheffield.ac.uk](mailto:Bmoore4@sheffield.ac.uk) 07713 0850947

Please put your initials in each box to confirm understanding/consent.

1.	I confirm that I have read and understood the information sheet providing an explanation of the nature and purpose of this research project and the nature of the sorting task I will be required to complete. I have also had the opportunity to ask questions about the project.	
2.	I understand that my participation in this research is entirely voluntary and that I am free to withdraw my consent and end my participation at any time before 31 <sup>st</sup> December 2019 without giving any reason and without any criticism.	
3.	I understand that a pseudonym will be used rather than my real name and the name of the Court will not be provided and other details such as my age and length of residence etc. will be reported only in categories. Although this will minimise scope for the identification of individual residents or employees of Housing & Care 21 I accept that this may still be possible.	
4.	I understand that I may request to be sent a summary of the results of the study prior to publication of the final report.	
5.	I consent to an audio recording being made to capture my comments and thoughts during the sorting task and my reasons for arranging the statements in the way I did. I understand that my words and comments may be quoted in research reports and publications relating to this research, but I will not be named or identified.	
6.	I agree to take part in this research project	

\_\_\_\_\_  
Name of Participant

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Researcher

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

*Once this has been signed by all parties the participant will receive a copy along with a copy of the information sheet and any other written information provided to the participants. A copy of the signed consent form will also be scanned and retained in the research file which will be kept in a secure location.*



## Participant Consent Form for Research into Priorities and Preferences for Retirement and Extra Care Housing

Providers, Professionals and Opinion Shapers

Title of Research Project:  
**Study to understand what residents do or don't like or want from retirement and extra care housing.**

Name of Researcher:  
**Bruce Moore PhD Student - School of Health and Related Research, Sheffield University**  
[Bmoore4@sheffield.ac.uk](mailto:Bmoore4@sheffield.ac.uk) 07713 0850947

Please put your initials in each box to confirm understanding/consent.

1.	I confirm that I have read and understood the information sheet providing an explanation of the nature and purpose of this research project and the nature of the sorting task I will be required to complete. I have also had the opportunity to ask questions about the project.	
2.	I understand that my participation in this research is entirely voluntary and that I am free to withdraw my consent and end my participation at any time before 31 <sup>st</sup> December 2019 without giving any reason and without any criticism.	
3.	I understand and consent to being named and identified as a participant in this research.	
4.	I understand that I may request to be sent a summary of the results of the study prior to publication of the final report.	
5.	I agree to take part in this research project	

\_\_\_\_\_  
Name of Participant

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Researcher

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

*Once this has been signed by all parties the participant will receive a copy along with a copy of the information sheet and any other written information provided to the participants. A copy of the signed consent form will also be scanned and retained in the research file which will be kept in a secure location.*



The aim is to arrange the cards in the grid pattern on the board to reflect your own views and preferences.

Suggested approach:

### **STEP 1**

Read through the statements on each of the cards one at a time and place each card into one of three piles. A pile for the statements that reflect what you most like or want, a pile for the statements that reflect what you most dislike or don't want and a third pile for the statements about which you are neutral or do not have a particular view.

### **STEP 2**

Once you have sorted all the statements into the three piles the next thing to do is to identify the two statements from the 'most like and want' pile that you feel most strongly (i.e. you like and want the most) and place them in the boxes at the far right hand side of the grid under +6.

(Note: It doesn't matter which order the statements are placed in under each column)

Now consider the statements in the 'most dislike or don't want' pile and identify the two statements that reflects what you most dislike or don't want. Place them in the boxes at the far left hand side of the grid under -6.

Next switch back to the 'most like and want' pile and identify the two statements from those that remain that reflect what you like or want the most and place them in the boxes at the right hand side of the grid under +5.

Now return to the 'most dislike or don't want' pile and identify the two statements from those that remain that reflect what you most dislike or don't want and place them in the boxes at the left hand side of the grid under -5.

Next switch back to the 'most like and want' pile and identify the three statements from those that remain that reflect what you like or want the most and place them in the boxes at the right hand side of the grid under +4.

Now return to the 'most dislike or don't want' pile and identify the three statements from those that remain that reflect what you most dislike or don't want and place them in the boxes at the left hand side of the grid under -4.

Repeat this process back and forth filling the grid from the 'most like and want' and the 'most dislike and don't want' piles in turn. When the cards in these piles are used up use the cards in the 'neutral or no particular view' pile to fill in the remaining spaces of the grid.

### **STEP 3**

When all the places on the grid have been filled and all the cards placed, take a few moments to look at the whole grid and the position of the statements. Take the

opportunity to make any revisions and re-adjustment of positions until you have a grid that you are happy with.

#### **Some Things to Note:**

- You may find it difficult to decide immediately which statements to position at +6 or -6, particularly if you have large number of statements in these piles. If this is the case, an option is to re-read the statements in these piles and in doing so start to order and grade them according to your strength of feeling.
- Try not to get too hung up on the ranking of a specific statement. For example, if there are three statements that are contenders for the two +6 positions don't over worry about which of them is relegated to the +5 position. You can re-adjust if necessary at the end if required, and the analysis is more concerned with general patterns than specific positions.
- Don't worry if the items in the 'most like and want' pile cross over into the negative rankings. This will not be interpreted as indicating you dislike or don't want it. The ranking system is only concerned with the position relative to the other statements and not with the absolute scores.
- Remember the order of statements within a column is not important so there is no need to try to present them in any particular order.

#### **STEP 4**

Once you are content with the positioning of the statements in the grid this will be captured on a scoring sheet that records the position of the statements in the array you have created.

#### **STEP 5**

Finally please record any reasons for your choices regarding the statements at each extreme of the array and give your thoughts about any other statements or why you positioned them as you did as well as providing any other reflections on the process.

Thank you for your participation. Your assistance it is greatly appreciated.

Bruce Moore

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## **Appendix 7**

### **Pictures of Participants Completing Q Study**

*Photographs of participants undertaking Q sorting at Extra Care sires 1 and 5.  
Prior approval was obtained for pictures to be taken and published in this thesis.*

**Pictures of Participants Creating Q Sorts at Extra Care Sites 1 and 5**



# **Appendix 8**

## **Extra Care Combined Results**

*Extract from the results produced by PQ Method for Combined Extra Care Study.*

## EC Combined Results from PQ Method

Three factors were identified from the sorts of the 68 Extra Care resident participants.

Search for 7 Factors provides 59% explanation of variation. Significant loadings on only five Factors but one had only one defining sort and another just two defining sorts.

Search for 5 Factors provides 57% explanation of variation. Significant loadings on only four Factors and one of these had just three defining sorts.

Search for 4 Factors provides 55% explanation of variation, but significant loadings on just three Factors.

Search for 3 Factors provides 56% explanation of variation with significant loadings on all three Factors. Sixteen sorts did not load significantly on any of the Factors and thirteen sorts were confounded, but there were multiple distinguishing statements identified for the three Factors so this was selected as basis for analysis.

<b>F1</b> 26, 52	<b>F2</b> 4, 10, 25, 27, 32, 33, 36, 37, 40, 43, 48	<b>F3</b> 6, 12, 17, 20, 29, 39, 44	<b>F4</b> -	<b>F5</b> 63	<b>F6</b> 3, 7, 8, 15, 19, 21, 23, 35, 42, 45, 53, 54, 55, 56, 58, 65, 66, 67, 68	<b>F7</b> -	<b>C (3)</b> 11, 18, 62	<b>NS (25)</b> 1, 2, 5, 9, 13, 14, 16, 22, 24, 28, 30, 31, 34, 38, 41, 46, 47, 49, 50, 51, 57, 59, 60, 61, 64
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>C (6)</b>	<b>NS (20)</b>		
6, 9, 12, 17, 20, 22, 26, 29, 32, 39, 44, 50, 52, 53, 57	4, 10, 16, 25, 33, 34, 36, 37, 40, 43, 46, 48	7, 8, 42, 47, 54, 55, 56, 58, 65, 66, 67, 68	-	14, 21, 63	11, 15, 18, 27, 62, 45	1, 2, 3, 5, 13, 19, 23, 24, 28, 30, 31, 35, 38, 41, 49, 51, 59, 60, 61, 64		
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>C (13)</b>	<b>NS (16)</b>			
5, 6, 9, 12, 17, 20, 21, 22, 26, 29, 39, 50, 52, 57, 64	4, 14, 25, 33, 36, 37, 40, 43, 46, 48	7, 8, 19, 23, 35, 42, 47, 55, 56, 58, 65, 66, 67, 68	-	10, 11, 15, 16, 18, 27, 32, 44, 45, 49, 53, 54, 62	1, 2, 3, 13, 24, 28, 30, 31, 34, 38, 41, 51, 59, 60, 61, 63			
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>C (13)</b>	<b>NS (16)</b>				
5, 6, 9, 12, 17, 20, 21, 22, 26, 29, 39, 50, 52, 57, 64	4, 14, 25, 33, 36, 37, 40, 43, 46, 48	7, 8, 19, 23, 35, 42, 47, 55, 56, 58, 65, 66, 67, 68	10, 11, 15, 16, 18, 27, 32, 44, 45, 49, 53, 54, 62	1, 2, 3, 13, 24, 28, 30, 31, 34, 38, 41, 51, 59, 60, 61, 63				

## Factor Matrix following Varimax Rotation with X Indicating a Defining Sort

	1	2	3	
1	0.4515	0.4464	0.3517	No significant loadings over 0.5
2	0.4885	0.4576	0.2925	No significant loadings over 0.5
3	0.4120	0.4142	0.4471	No significant loadings over 0.5
4	0.2318	0.6581X	-0.0753	
5	0.5325X	0.4300	0.2622	
6	0.6967X	0.2919	0.2193	
7	0.3359	0.0683	0.6469X	
8	0.4893	0.3148	0.5747X	
9	0.5405X	0.4504	0.4322	
10	0.5214	0.6227	0.3667	Confounded on Factors 1 and 2
11	0.3733	0.5669	0.5918	Confounded on Factors 2 and 3
12	0.6152X	0.3378	0.2442	
13	0.0691	0.3250	0.0385	No significant loadings over 0.5
14	0.4709	0.5813X	0.3729	
15	0.5510	0.1579	0.5369	Confounded on Factors 1 and 3
16	0.5119	0.5212	0.3196	Confounded on Factors 1 and 2
17	0.7366X	0.3225	-0.1027	
18	0.5516	0.0551	0.5949	Confounded on Factors 1 and 3
19	0.4800	0.2877	0.5161X	
20	0.6222X	0.3344	0.4239	
21	0.5522X	0.4014	0.4659	
22	0.5552X	0.4388	0.3300	
23	0.2284	0.0827	0.5317X	
24	0.4496	0.1874	0.2953	No significant loadings over 0.5
25	0.3297	0.6402X	0.2668	
26	0.7407X	0.1837	0.2080	
27	0.5538	0.5365	0.3506	Confounded on Factors 1 and 2
28	0.3921	0.4306	0.4497	No significant loadings over 0.5
29	0.5462X	0.1557	0.2056	
30	0.2626	0.4487	0.3769	No significant loadings over 0.5
31	0.3427	0.2761	0.4133	No significant loadings over 0.5
32	0.5248	0.5223	0.2669	Confounded on Factors 1 and 2
33	0.1848	0.5717X	-0.0438	
34	0.1387	0.4827	0.4080	No significant loadings over 0.5
35	0.3434	0.2649	0.5133X	
36	0.1668	0.6652X	0.1550	
37	0.3729	0.5485X	0.3433	
38	0.3782	0.3478	0.4114	No significant loadings over 0.5
39	0.5829X	0.3191	0.2752	
40	0.3195	0.5623X	0.4076	
41	0.2507	0.3101	0.3208	No significant loadings over 0.5
42	0.4377	0.2320	0.6970X	
43	0.2315	0.5406X	0.4879	
44	0.6349	0.3694	0.5096	Confounded on Factors 1 and 3
45	0.5806	0.2739	0.6015	Confounded on Factors 1 and 3
46	0.3256	0.5943X	0.4819	
47	0.3743	0.4533	0.5638X	
48	0.4617	0.5763X	0.3834	
49	0.5346	0.5252	0.4178	Confounded on Factors 1 and 2
50	0.6643X	0.3281	0.2591	
51	0.2486	0.4169	0.3972	No significant loadings over 0.5
52	0.5659X	0.2016	0.2868	
53	0.5629	0.3994	0.5065	Confounded on Factors 1 and 3
54	0.5234	0.3336	0.5552	Confounded on Factors 1 and 3
55	0.2944	0.3234	0.5956X	
56	0.3823	0.1526	0.6412X	
57	0.5422X	0.2189	0.2859	
58	0.3502	0.1072	0.6619X	
59	0.2592	0.4220	0.2662	No significant loadings over 0.5
60	-0.0648	0.0337	0.2209	No significant loadings over 0.5
61	0.1994	0.4184	0.4936	No significant loadings over 0.5
62	0.0805	0.5898	0.5418	Confounded on Factors 2 and 3
63	0.2264	0.3397	0.3797	No significant loadings over 0.5
64	0.5483X	0.4117	0.3943	
65	0.3785	0.0095	0.7593X	
66	0.3381	0.3394	0.6198X	
67	0.2302	0.3696	0.6407X	
68	0.1524	0.3743	0.6398X	
%expl.var.	20	17	19	

## Correlations Between Factors

	1	2	3
1	1.0000	0.7655	0.7628
2	0.7655	1.0000	0.6876
3	0.7628	0.6876	1.0000

## Extra care Combined Factor Arrays

No.	Statement	1	2	3
1	A court manager to turn to if you need help and advice	5	4	3
2	A resident manager or warden who lives on-site	-4	-2	0
3	A court manager who is only employed on a part-time basis	-5	-3	-5
4	Close to shops, amenities and transport	-1	-1	-1
5	No need to worry about maintenance and repairs	0	3	2
6	Repairs or problems are addressed and fixed quickly	-1	1	3
7	The appearance of the Court creates a good impression	1	0	0
8	Companionship of neighbours so you are never lonely	1	2	-2
9	Use of a communal lounge and other shared facilities	0	2	-2
10	Peace of mind that comes from being looked after	1	4	1
11	Living around people of a similar age and outlook	0	1	-2
12	Occupancy restricted to only retired people aged over 65	-3	-1	-4
13	Residents are able to have dogs, cats or other pets	-2	-4	1
14	Having security of tenure	3	0	4
15	A communal laundry room with washers and dryers	-2	-1	1
16	An effective and efficient heating and hot water system	2	2	5
17	Feeling safe and secure	6	6	2
18	A garden or balcony so you can sit out in private	-1	-2	0
19	Social events and activities to get involved in	3	3	-1
20	Availability of a good internet connection and/or wifi	-1	-4	0
21	Pull-cord or pendant to summon help in an emergency	2	5	2
22	Sufficient car parking spaces	-3	-3	1
23	Community spirit and friendship with people of similar age and outlook	2	1	0
24	You have your own home with your own front door	5	3	6
25	In a nice area with attractive surroundings	1	1	-1
26	Being seen as form of care home	-4	-3	-4
27	Freedom to live as you choose: no requirement to join in or conform	4	1	1
28	Independent living	6	0	3
29	Able to have your say and raise matters with senior management	3	0	1
30	Residents are engaged and able to exercise choice and control	2	2	-1
31	Residents are treated with dignity and respect	4	5	5
32	Some other residents behave badly	-5	-6	-6
33	Residents take control and assume responsibility for organising things	1	-1	-3
34	People don't respect privacy or confidentiality	-6	-5	-5
35	Gossip spreads quickly	-6	-5	-6
36	Residents with dementia or who need to be looked after	-2	0	-3
37	Living in close proximity to others in a compact community	-3	-1	-3
38	Small flats	-4	-6	-4
39	Properties and facilities that are modern and well-designed	0	-1	0
40	Buildings and gardens are kept clean and tidy	0	0	-1
41	Contemporary kitchens and bathrooms	-1	-2	0
42	Checks on fire, electrical, gas, asbestos and water safety	1	2	2
43	Everyone is kept informed and up to date about local plans a	2	0	1
44	Information about costs and charges is correct, clear and co	0	-2	2
45	Wide doors, that are easy to open, for people with reduced m	0	1	3
46	A reliable lift	0	1	6
47	A suitable storage area for buggies and other large items	-2	-2	0
48	Good staff who provide consistency of service	3	4	4
49	Common lounge used by external organisations and groups	-2	-4	-3
50	Guest room available for visitors	-1	-3	-2
51	Care staff on-site 24 hours 7 days a week if needed (EC)	4	6	4
52	An on-site restaurant (EC)	1	3	-1
53	Hairdressing salon on-site (EC)	-1	0	-2
54	An accessible bath for those that want or need it (EC)	-3	-1	-1

## **Appendix 9**

### **Extra Care Results for Sites 1-5**

*Extract from the results produced by PQ Method for Extra Care Sites 1-5.*

## Extra Care Site 1

### Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
EC1 res1	100	42	20	36	20	33	22	22	45	31	54	38	25	47	44
EC1 res2	42	100	36	43	17	48	30	34	51	47	37	53	29	44	58
EC1 res3	20	36	100	45	37	26	42	32	45	49	44	41	21	50	51
EC1 res4	36	43	45	100	38	37	50	53	74	59	63	70	34	54	56
EC1 res5	20	17	37	38	100	17	26	41	39	18	30	32	30	21	32
EC1 res6	33	48	26	37	17	100	35	38	56	29	33	49	30	37	50
EC1 res7	22	30	42	50	26	35	100	42	47	50	38	56	37	61	36
EC1 res8	22	34	32	53	41	38	42	100	64	40	44	56	32	33	42
EC1 res9	45	51	45	74	39	56	47	64	100	48	63	64	30	45	61
EC1 res10	31	47	49	59	18	29	50	40	48	100	42	52	31	55	55
EC1 res11	54	37	44	63	30	33	38	44	63	42	100	50	52	55	47
EC1 res12	38	53	41	70	32	49	56	56	64	52	50	100	29	55	62
EC1 res13	25	29	21	34	30	30	37	32	30	31	52	29	100	47	36
EC1 res14	47	44	50	54	21	37	61	33	45	55	55	55	47	100	60
EC1 res15	44	58	51	56	32	50	36	42	61	55	47	62	36	60	100

Three factors were identified from the sorts of the 15 Extra Care resident participants at Site 1.

Search for 7 Factors provides 54% explanation of variation, but significant loadings on only five Factors and of these two had only one defining sort.

Search for 5 Factors provides 56% explanation of variation, but significant loadings on only four Factors and one of these had just one defining sort.

Search for 4 Factors provides 53% explanation of variation, but significant loadings on only three Factors.

Search for 3 Factors provides 52% explanation of variation with significant loadings on all three Factors. Five of the fifteen sorts not loading significantly on any of the Factors and there was one confounded sort, but there were multiple distinguishing statements identified for all three Factors so selected as basis for analysis.

### Movement of Sorts with Different Factor Configurations

<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>F6</b>	<b>F7</b>	<b>C (0)</b>	<b>NS (5)</b>
2, 15	11	5	7, 14	-	-	4, 8, 9, 12		1, 3, 6, 10, 13
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>F6</b>	<b>F7</b>	<b>C (2)</b>	<b>NS (3)</b>
2, 6, 15	11	5, 8	-	3, 7, 10, 12			9, 14	1, 4, 14
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>F6</b>	<b>F7</b>	<b>C (1)</b>	<b>NS (5)</b>
2, 6, 12, 15	11, 14	4, 5, 8	-				9	1, 3, 7, 10, 13
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>F6</b>	<b>F7</b>	<b>C (1)</b>	<b>NS (5)</b>
2, 6, 12, 15	11, 14	4, 5, 8					9	1, 3, 7, 10, 13



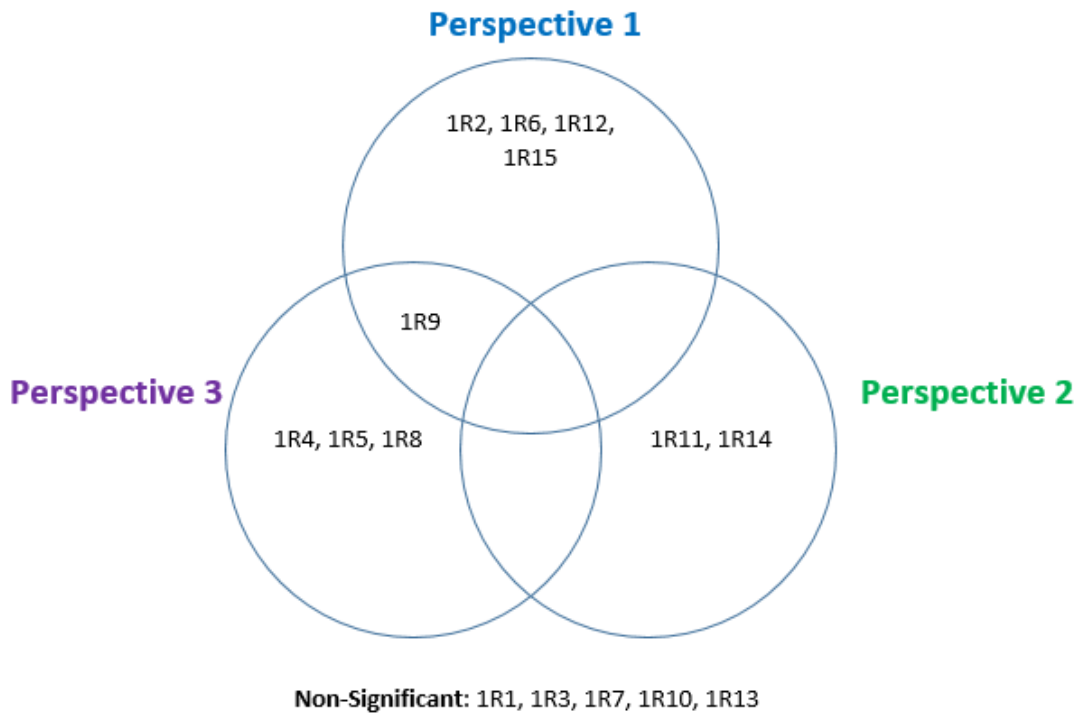
### Factor Matrix with an X Indicating a Defining Sort

QSORT	Loadings			
	1	2	3	
EC1 res1	0.4388	0.2936	0.1435	No significant loadings over 0.5
EC1 res2	0.6742X	0.3016	0.0544	
EC1 res3	0.3434	0.3666	0.3109	No significant loadings over 0.5
EC1 res4	0.4330	0.4094	0.5374X	
EC1 res5	0.0182	0.2165	0.5437X	No significant loadings over 0.5
EC1 res6	0.5551X	0.1475	0.2458	
EC1 res7	0.3104	0.4769	0.3045	No significant loadings over 0.5
EC1 res8	0.3426	0.1339	0.6308X	
EC1 res9	0.5764	0.1959	0.6444	Confounded on Factors 1 and 3
EC1 res10	0.3896	0.4653	0.2984	No significant loadings over 0.5
EC1 res11	0.2354	0.5851X	0.4582	
EC1 res12	0.6227X	0.2769	0.4467	No significant loadings over 0.5
EC1 res13	0.1836	0.4394	0.2573	
EC1 res14	0.3390	0.8449X	0.0898	No significant loadings over 0.5
EC1 res15	0.6835X	0.3857	0.2216	
% expl.Var.	20	17	15	

### Correlations Between Factor Scores

	1	2	3
1	1.0000	0.6462	0.6160
2	0.6462	1.0000	0.5182
3	0.6160	0.5182	1.0000

### Distribution of Extra Care Site 1 Sorts across Three Perspectives



### Extra Care Site 1 Perspective 1 – Looked After and Access to Amenities

People at Site 1 with this perspective (and Perspective 3) want to be safe and secure (#17: +6) and have a pendant or pull-cord to summons help (#21: +6) from the on-site care team whenever they need it (#51: +5) and they are not particularly concerned about being independent (#28: -1). A particular desire of this perspective is to be looked after and have peace of mind (#10: +4). They do not want to be worried about repairs and maintenance (#5: +3) but it is not so important that things are fixed quickly (#6: 0). They want to have their own home and front door (#24: +3) but want to ensure this also gives them security of tenure (#14: +4).

People with this perspective want to be close to shops, amenities and transport (#4: +3) although they are not concerned about car parking (#22: -2). A reliable lift is considered to be an essential requirement (#46: +5), an efficient and effective heating system is seen as important (#16: +3) and having a garden or balcony where you can sit out in private would also be desirable (#18: +2).

This perspective does not feel a sense of community spirit from living around people of a similar age and outlook (#23: -3) or want the companionship of neighbours (#8: -1). They do not therefore prioritise the provision of a communal lounge (#9: -2) or an on-site restaurant (#52: 0), but they do still appreciate having a laundry (#15: +1), having social events (#19: +2) and being kept informed about local plans and activities (#43: +1). This perspective does not mind having residents with dementia or who need looking after (#36: +1), but really does object to people who have pets (#13: -5).

### Extra Care Site 1 Perspective 2 – Security of Tenure and Independence

This perspective values having care staff on-site 24 hours a day 7 days a week (#51: +6), but does not consider it is especially important to be able to summons them via a pull-cord or pendant (#21: +2). They see the availability of help and advice from a court manager as positive (#1: +4) and definitely would not want them to only be employed on a part-time basis (#3: -5). They want to good staff who provide consistency of service (#48: +5) and who treat them with dignity and respect (#31: +4). Being able to live independently is of prime importance (#28: +5). They do not have an over-riding concern for safety and security (#17: +1), but are concerned to ensure that they have security of tenure (#14: +6) in their own home (#24: +3) and that checks are carried out on fire, electrical, gas, asbestos and water safety (#42: +3).

They do not want social events and activities to get involved in (#19: -3) and hence do not see the value in a communal lounge (#9: -2). They do not value the provision of a communal laundry (#15: -1), but see an advantage in having an on-site restaurant (#52: +2). They do not dismiss the benefits of the companionship of neighbours (#8: +1), but do not want to necessarily live in a compact community (#37: -3), around others of a similar age and outlook (#11: -2) or consider that this creates a community spirit (#23: 0). They particularly object to other residents taking responsibility for organising things (#33: -5).

They want to be able to connect to the internet (#20: +2), but are not concerned about being close to shops, amenities and transport (#4: -2). They want the property to be modern and well designed (#39: +2) and to have up to date kitchens and bathrooms (#41: +1) as well as an efficient and effective heating and hot water system (#16: +3).

### Extra Care Site 1 Perspective 3 – Safety with Companionship and Control

Extra Care participants from Site 1 with this perspective (and Perspective 1) want to be safe and secure (#17: +6) and have a pendant or pull-cord to summons help (#21: +6) from the on-site care team whenever they need it (#51: +5) and they are not particularly concerned about being independent (#28: -1).

They value the companionship of their neighbours (#8: +4) much more than having a manager to turn to for help and advice (#1: +1) and this perspective would not object if the court manager was only available on a part-time basis (#3: 0). They appreciate living with people of a similar age and outlook (#11: +2) and the sense of community spirit this creates (#23: +2). They do not support occupancy only being for retired people aged over 65 (#12: -3), but they think it is positive to have residents with dementia or who need to be looked after (#36: +3).

They think it is good to have a communal lounge (#9: +3) and on-site restaurant (#52: +3), but do not value the laundry (#15: -3). This perspective also does not give priority to the provision of a lift (#46: -3), or private outside space (#18: -2) and ascribes no particular significance to the heating and hot water system (#16: +1).

This perspective wants check on fire, electrical, gas, asbestos and water safety (#42: +3) and also wants to be engaged and able to exercise choice and control (#30: +4) and to be treated with dignity and respect (#31: +5). They have no desire to be near shops, amenities or transport (#4: -4) or to have connection to the internet (#20: -6).

## Extra Care Site 1 Factor Arrays

No.	Statement	1	2	3
1	A court manager to turn to if you need help and advice	2	4	1
2	A resident manager or warden who lives on-site	-3	-2	-1
3	A court manager who is only employed on a part-time basis	-5	-5	0
4	Close to shops, amenities and transport	3	-2	-4
5	No need to worry about maintenance and repairs	3	1	1
6	Repairs or problems are addressed and fixed quickly	0	3	1
7	The appearance of the Court creates a good impression	1	0	-1
8	Companionship of neighbours so you are never lonely	-1	1	4
9	Use of a communal lounge and other shared facilities	-2	-2	3
10	Peace of mind that comes from being looked after	4	1	1
11	Living around people of a similar age and outlook	1	-2	2
12	Occupancy restricted to only retired people aged over 65	-2	-2	-3
13	Residents are able to have dogs, cats or other pets	-5	-1	-2
14	Having security of tenure	4	6	0
15	A communal laundry room with washers and dryers	1	-1	-3
16	An effective and efficient heating and hot water system	3	3	1
17	Feeling safe and secure	6	1	6
18	A garden or balcony so you can sit out in private	2	-1	-2
19	Social events and activities to get involved in	2	-3	1
20	Availability of a good internet connection and/or wifi	-4	2	-6
21	Pull-cord or pendant to summon help in an emergency	6	2	6
22	Sufficient car parking spaces	-2	0	0
23	Community spirit and friendship with people of similar age a	-3	0	2
24	You have your own home with your own front door	3	3	2
25	In a nice area with attractive surroundings	0	0	2
26	Being seen as form of care home	-3	-3	-2
27	Freedom to live as you choose: no requirement to join in or conform	2	4	0
28	Independent living	-1	5	0
29	Able to have your say and raise matters with senior management	0	-1	0
30	Residents are engaged and able to exercise choice and control	-1	-1	4
31	Residents are treated with dignity and respect	2	4	5
32	Some other residents behave badly	-6	-6	-6
33	Residents who take control and assume responsibility for organising things	-2	-5	-2
34	People don't respect privacy or confidentiality	-4	-4	-4
35	Gossip spreads quickly	-4	-6	-5
36	Residents with dementia or who need to be looked after	1	-1	3
37	Living in close proximity to others in a compact community	0	-3	0
38	Small flats	-6	-4	-5
39	Properties and facilities that are modern and well-designed	0	2	-1
40	Buildings and gardens are kept clean and tidy	1	-1	0
41	Contemporary kitchens and bathrooms	-3	1	-4
42	Checks on fire, electrical, gas, asbestos and water safety	1	3	3
43	Everyone is kept informed and up to date about local plans and activities	1	0	-1
44	Information about costs and charges is correct, clear and comprehensive	-1	1	-2
45	Wide doors, that are easy to open, for people with reduced mobility	0	0	2
46	A reliable lift	5	2	-3
47	A suitable storage area for buggies and other large items	-1	-1	-1
48	Good staff who provide consistency of service	4	5	4
49	Common lounge used by external organisations and groups	-1	-4	-3
50	Guest room available for visitors	-1	1	-1
51	Care staff on-site 24 hours 7 days a week if needed (EC)	5	6	5
52	An on-site restaurant (EC)	0	2	3
53	Hairdressing salon on-site (EC)	-2	0	1
54	An accessible bath for those that want or need it (EC)	0	-3	-1

## Extra Care Site 2

### Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7	8	9
EC2 R1	100	13	28	17	-4	19	15	12	1
EC2 R2	13	100	62	38	51	45	57	57	56
EC2 R3	28	62	100	34	55	41	58	62	61
EC2 R4	17	38	34	100	38	33	32	39	30
EC2 R5	-4	51	55	38	100	41	51	67	53
EC2 R6	19	45	41	33	41	100	60	55	53
EC2 R7	15	57	58	32	51	60	100	60	59
EC2 R8	12	57	62	39	67	55	60	100	65
EC2 R9	1	56	61	30	53	53	59	65	100

**Only one factor was identified from the sorts of the 9 Extra Care resident participants at Site 2.**

Search for 7 Factors provides 61% explanation of variation, but significant loadings on only four Factors and one of these had only one defining sort.

Search for 4 Factors provides 55% explanation of variation, but significant loadings on only three Factors and only one of these had more than one defining sort.

Search for 3 Factors provides 45% explanation of variation, but significant loadings on only two Factors with one of these having seven defining sorts and the other having just one.

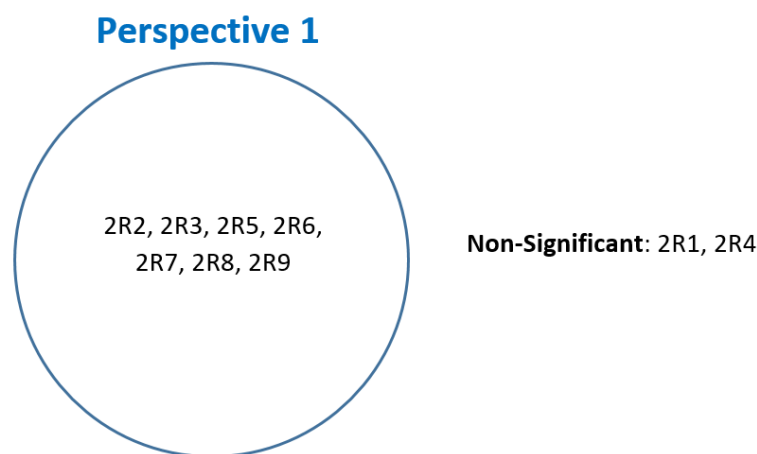
Search for 2 Factors provides 50% explanation of variation but only one Factor had any defining sorts and two sort did not load significantly on either of the Factors. Just the Factor with seven defining sorts was selected as a basis for analysis.

<b>F1</b> 3, 9	<b>F2</b> -	<b>F3</b> 1	<b>F4</b> 6, 7	<b>F5</b> 5, 8	<b>F6</b> -	<b>F7</b> -	<b>C (0)</b> -	<b>NS (2)</b> 2, 4
<b>F1</b> 2, 3, 5, 8, 9	<b>F2</b> -	<b>F3</b> 1	<b>F4</b> 6	<b>C (1)</b> 7	<b>NS (1)</b> 4			
<b>F1</b> 2, 3, 5, 6, 7, 8, 9	<b>F2</b> -	<b>F3</b> 1	<b>C (0)</b> -	<b>NS (1)</b> 4				
<b>F1</b> 2, 3, 5, 6, 7, 8, 9	<b>F2</b> -	<b>C (0)</b> -	<b>NS (1)</b> 1, 4					

### Factor Matrix with an X Indicating a Defining Sort

QSORT	1	2	
EC2 R1	0.0354	0.4327	No significant loadings over 0.5
EC2 R2	0.6696X	0.3223	
EC2 R3	0.6737X	0.4544	No significant loadings over 0.5
EC2 R4	0.4291	0.2412	
EC2 R5	0.6834X	0.0997	
EC2 R6	0.6694X	0.1098	
EC2 R7	0.7575X	0.1680	
EC2 R8	0.8369X	0.1084	
EC2 R9	0.7677X	0.0369	
% expl.Var.	43		

Figure 5A.4: Distribution of Extra Care Site 2 Sorts for a Single Perspective



### Extra Care Site 2 Single Perspective – Home and Help

The most important features are having your own home with its own front door (#24: +6) as well as having care on-site 24 hours a day 7 days a week (#51: +6). Residents want to be safe and secure (#17: +4) and also be treated with dignity and respect (#31: +5). They want good staff who provide consistency of service (#48: +4) and would want the court manager not only available to provide help and advice (#1: +2) but to live on-site as a preference (#2: +3). Residents want to be looked after (#10: +2) and not have to worry about maintenance and repairs (#5: +3). Having security of tenure is also an important consideration (#14: +4). Independent living though is a relatively low priority (#28: +1) and there is not a great push for freedom of choice (#27: +1) or the ability to have your say with senior management (#29: +1) or exercise control (#30: 0).

They want a reliable lift (#46: +5) and a pull-cord or pendant to summons help in an emergency (#21: +3). They also want an effective and efficient heating and hot water system (#16: +2) and wide doors for mobility (#45: +2) but they are not concerned to have an on-site restaurant (#52: -1), hairdresser (#53: -1), accessible bath (#54: -1), communal lounge (#9: 0), guest room (#50: -2), storage for buggies (#47: 0), or modern kitchens and bathrooms (#41: -2). There is a slight preference for a communal laundry (#15: +1).

**Social events are not key consideration for this perspective (#19: 0) and because there is not a sense of community spirit (#23: 0) there is not a preference for living with others of a similar age and outlook (#11: -2). There is a strong opinion that occupancy should not only be for retired people aged over 65 (#12: -5). Living in close proximity in a compact community is seen as problematic (#37: -3) particularly when there are residents who behave badly (#32: -6), who gossip (#35: -6) and do not respect confidentiality (#34:-4), but so is having residents with dementia (#36: -3).**

## Extra Care Site 2 Factor Array

No.	Statement	
24	You have your own home with your own front door	6
51	Care staff on-site 24 hours 7 days a week if needed (EC)	6
31	Residents are treated with dignity and respect	5
46	A reliable lift	5
17	Feeling safe and secure	4
14	Having security of tenure	4
48	Good staff who provide consistency of service	4
44	Information about costs and charges is correct, clear and comprehensive	3
21	Pull-cord or pendant to summon help in an emergency	3
5	No need to worry about maintenance and repairs	3
2	A resident manager or warden who lives on-site	3
45	Wide doors, that are easy to open, for people with reduced mobility	2
10	Peace of mind that comes from being looked after	2
16	An effective and efficient heating and hot water system	2
6	Repairs or problems are addressed and fixed quickly	2
1	A court manager to turn to if you need help and advice	2
42	Checks on fire, electrical, gas, asbestos and water safety	1
28	Independent living	1
43	Everyone is kept informed and up to date about local plans and activities	1
4	Close to shops, amenities and transport	1
27	Freedom to live as you choose: no requirement to join in or conform	1
15	A communal laundry room with washers and dryers	1
8	Companionship of neighbours so you are never lonely	1
29	Able to have your say and raise matters with senior management	0
9	Use of a communal lounge and other shared facilities	0
47	A suitable storage area for buggies and other large items	0
23	Community spirit and friendship with people of similar age and outlook	0
30	Residents are engaged and able to exercise choice and control	0
19	Social events and activities to get involved in	0
7	The appearance of the Court creates a good impression	0
22	Sufficient car parking spaces	-1
18	A garden or balcony so you can sit out in private	-1
54	An accessible bath for those that want or need it (EC)	-1
52	An on-site restaurant (EC)	-1
53	Hairdressing salon on-site (EC)	-1
39	Properties and facilities that are modern and well-designed	-1
40	Buildings and gardens are kept clean and tidy	-1
25	In a nice area with attractive surroundings	-1
13	Residents are able to have dogs, cats or other pets	-2
11	Living around people of a similar age and outlook	-2
41	Contemporary kitchens and bathrooms	-2
50	Guest room available for visitors	-2
49	Common lounge used by external organisations and groups	-2
33	Residents who take control and assume responsibility for organising things	-3
37	Living in close proximity to others in a compact community	-3
20	Availability of a good internet connection and/or wifi	-3
36	Residents with dementia or who need to be looked after	-3
34	People don't respect privacy or confidentiality	-4
38	Small flats	-4
3	A court manager who is only employed on a part-time basis	-4
26	Being seen as form of care home	-5
12	Occupancy restricted to only retired people aged over 65	-5
32	Some other residents behave badly	-6
35	Gossip spreads quickly	-6

## Extra Care Site 3

### Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7	8	9	10	11	12	13	14
EC3 Res1	100	70	69	68	50	53	55	76	63	53	56	40	49	57
EC3 Res2	70	100	58	67	45	54	56	64	68	59	64	43	52	43
EC3 Res3	69	58	100	70	70	58	56	72	61	55	55	46	47	48
EC3 Res4	68	67	70	100	69	56	49	68	67	59	49	46	48	36
EC3 Res5	50	45	70	69	100	44	56	65	58	41	40	50	55	40
EC3 Res6	53	54	58	56	44	100	44	40	39	46	39	40	33	33
EC3 Res7	55	56	56	49	56	44	100	53	52	33	49	45	39	37
EC3 Res8	76	64	72	68	65	40	53	100	75	58	64	51	58	45
EC3 Res9	63	68	61	67	58	39	52	75	100	59	61	51	65	46
EC3 Res10	53	59	55	59	41	46	33	58	59	100	63	35	48	25
EC3 Res11	56	64	55	49	40	39	49	64	61	63	100	35	56	42
EC3 Res12	40	43	46	46	50	40	45	51	51	35	35	100	56	46
EC3 Res13	49	52	47	48	55	33	39	58	65	48	56	56	100	31
EC3 Res14	57	43	48	36	40	33	37	45	46	25	42	46	31	100

### Three factors were identified from the sorts of the 14 Extra Care resident participants at Site 3.

Search for 7 Factors provides 66% explanation of variation, but significant loadings on only five Factors and two of these had only one defining sort.

Search for 5 Factors provides 64% explanation of variation, but with significant loadings on only four of the five Factors.

Search for 4 Factors provides 61% explanation of variation, but with significant loadings on only three of the four Factors.

Search for 3 Factors provides 62% explanation of variation and at least two significant loadings on each of the three Factors so selected as basis for analysis

<b>F1</b> 1, 14	<b>F2</b> 12	<b>F3</b> 9, 10, 11, 13	<b>F4</b> 1	<b>F5</b> 6	<b>F6</b> -	<b>F7</b> 3, 4, 5, 8	<b>C (1)</b> 2	<b>NS (1)</b> 7
<b>F1</b> 1, 14	<b>F2</b> 5, 12	<b>F3</b> 9, 10, 11, 13	<b>F4</b> -	<b>F5</b> 3, 4, 6			<b>C (1)</b> 2	<b>NS (2)</b> 7, 8
<b>F1</b> 1, 3, 4, 6	<b>F2</b> 5, 12	<b>F3</b> 8, 10, 11, 13	<b>F4</b> -				<b>C (2)</b> 2, 9	<b>NS (2)</b> 7, 14
<b>F1</b> 1, 3, 4, 6	<b>F2</b> 5, 12	<b>F3</b> 8, 10, 11					<b>C (3)</b> 2, 9, 13	<b>NS (2)</b> 7, 14



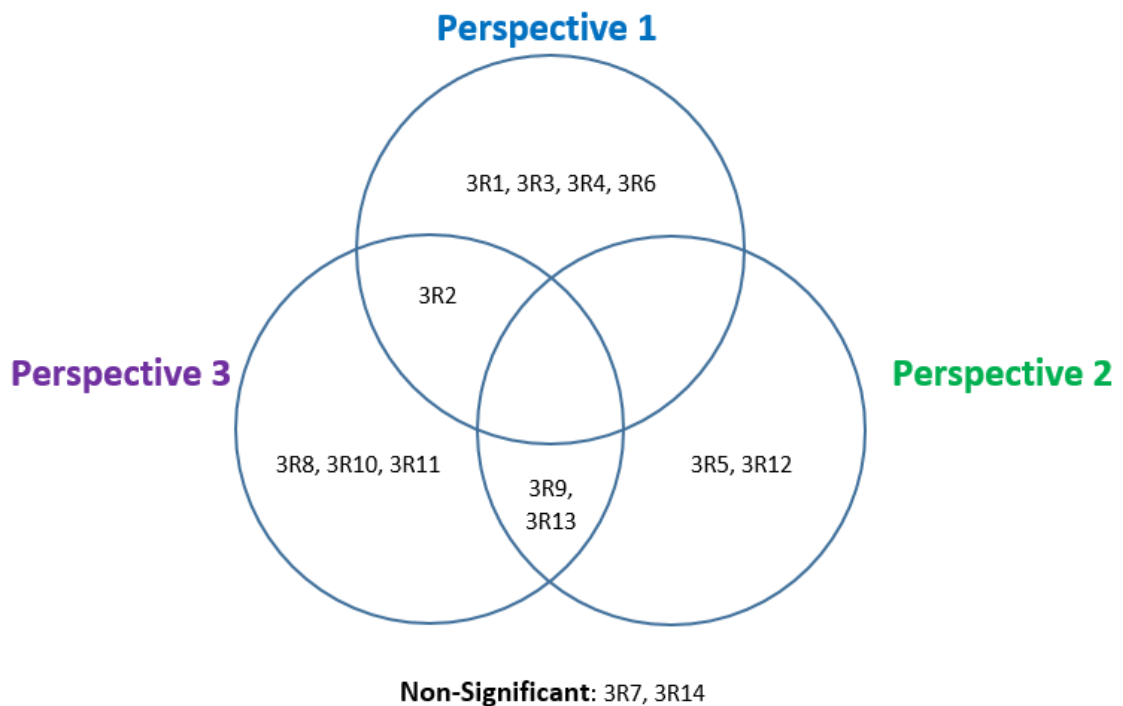
### Factor Matrix with an X Indicating a Defining Sort

QSORT	1	2	3	
EC3 Res1	0.5550X	0.3577	0.4874	
EC3 Res2	0.5243	0.2588	0.5759	Confounded on Factors 1 and 3
EC3 Res3	0.6481X	0.4354	0.3361	
EC3 Res4	0.6020X	0.3402	0.4462	
EC3 Res5	0.4662	0.5911X	0.2165	
EC3 Res6	0.6902X	0.1383	0.2017	
EC3 Res7	0.4796	0.3806	0.2811	No significant loadings over 0.5
EC3 Res8	0.4623	0.4775	0.5352X	
EC3 Res9	0.2794	0.5184	0.6382	Confounded on Factors 2 and 3
EC3 Res10	0.3902	0.0592	0.6792X	
EC3 Res11	0.2166	0.3301	0.6856X	
EC3 Res12	0.2187	0.6842X	0.1945	
EC3 Res13	0.1606	0.5016	0.5212	Confounded on Factors 2 and 3
EC3 Res14	0.4112	0.3492	0.2009	No significant loadings over 0.5
% expl.Var.	22	18	22	

### Correlations Between Factor Scores

	1	2	3
1	1.0000	0.6675	0.7281
2	0.6675	1.0000	0.5544
3	0.7281	0.5544	1.0000

Figure 5A.5: Distribution of Extra Care Site 3 Sorts across Three Perspectives



### Extra Care Site 3 Perspective 1 – Care and Help On-Call with Dignity and Respect

This perspective wants to be able to call for help in an emergency (#21: +6) and therefore also wants to have care staff on-site 24 hours a day 7 days a week (#51: +6) as well as a court manager they can turn to for help and advice (#1: +5). They would not mind if the court manager lived on-site (#2: 0), but are very clear that they should not just be part-time (#3: -6). They want the peace of mind that comes from being looked after (#10: +3) and good staff who provide consistency of service (#48: +3) but it is even more important that they are treated with dignity and respect (#31: +5).

They do not have a particular desire for independent living (#28: 0) or to be able to exercise choice and control (#30: 0), but they do want the freedom to choose whether they want to join in or conform (#27: +2). They do like having social events and activities to get involved in (#19: +2) but do not have a strong desire for the companionship of neighbours (#8: +1) or preference to live with other people of a similar age and outlook (#11: +1) or think that creates a sense of community spirit (#23: +1). They do see a benefit of having a communal lounge (#9: +1), but not an on-site hairdresser (#53: -3), accessible bath (#54: -4), guestroom (#50: -2) or storage area for buggies (#47: -2). They are positive though about the benefits of an on-site restaurant (#52: +4).

### Extra Care Site 3 Perspective 2 – Community Spirit with Freedom and Independence

The top priorities for this perspective are independent living (#28: +6) and freedom to live as they choose (#27: +6), which includes the ability for residents to have pets (#13: +2). They want to be safe and secure (#17: +5) but do not necessarily want to be looked after (#10: 0). They do value having care staff on-site 24 hours a day 7 days a week (#51: +4) and a court manager they can turn to for help and advice (#1: +4) but although they should not just be part-time (#3: -6) they do not want them living on-site (#2: -3).

This perspective enjoys living with others of a similar age and outlook (#11: +4) and the community spirit this creates (#23: +3) even though they do not think that occupation should be restricted only to retired people aged over 65 (#12: -2) or enjoy living in close proximity to others in a compact community (#37: -3). They do not particularly want to get involved in social events and activities (#19: +1) so are not advocates for having use of a communal lounge (#9: -1). They are slightly in favour of an on-site restaurant (#52: +1), but against having a communal laundry (#15: -3).

They do not consider having your own home and front door to be a priority concern (#24: +1), but this may be because this, like having security of tenure (#14: -1) and checks on fire, electrical, gas, asbestos and water safety (#42: +1) are simply taken for granted.

### Extra Care Site 3 Perspective 3 – Security of Tenure in Own Home with Lift and Laundry

The most important consideration for this perspective is having your own home with its own front door (#24: +6) with the certainty of security of tenure (#14: +6) that provides peace of mind (#10: +4) and makes them feel safe and secure (#17: +5).

They do not consider it is especially important to have care staff on-site 24 hours a day 7 days a week (#51: +1) or to be able summons them via a pendant or pull-cord in an emergency (#21: +2) or for there to be a court manager to turn to for help and advice (#1: +2). It is though a priority to have a reliable lift (#46: +4) and wide doors that are easy to open by people with reduced mobility (#46: +4). They consider there is a significant benefit in having a communal laundry (#15: +5), but not in having an on-site restaurant (#52: -1).

They do not feel that there is an advantage in living with people of a similar age and outlook (#11: -1) or that creates a sense of companionship (#8: -1) or community spirit (#23: 0). They are not interested in social events and activities (#19: 0) and hence do not see a particular advantage in having a communal lounge (#9: 0).

### Extra Care Site 3 Factor Arrays

No.	Statement	1	2	3
1	A court manager to turn to if you need help and advice	5	4	2
2	A resident manager or warden who lives on-site	0	-3	-3
3	A court manager who is only employed on a part-time basis	-6	-6	-4
4	Close to shops, amenities and transport	0	-3	-1
5	No need to worry about maintenance and repairs	3	2	1
6	Repairs or problems are addressed and fixed quickly	1	2	3
7	The appearance of the Court creates a good impression	0	3	1
8	Companionship of neighbours so you are never lonely	1	1	-1
9	Use of a communal lounge and other shared facilities	1	-1	0
10	Peace of mind that comes from being looked after	3	0	4
11	Living around people of a similar age and outlook	1	4	-1
12	Occupancy restricted to only retired people aged over 65	-2	-2	-3
13	Residents are able to have dogs, cats or other pets	-3	2	-3
14	Having security of tenure	2	-1	6
15	A communal laundry room with washers and dryers	0	-3	5
16	An effective and efficient heating and hot water system	3	3	3
17	Feeling safe and secure	4	5	5
18	A garden or balcony so you can sit out in private	-1	0	-3
19	Social events and activities to get involved in	2	1	0
20	Availability of a good internet connection and/or wifi	-2	2	0
21	Pull-cord or pendant to summon help in an emergency	6	3	2
22	Sufficient car parking spaces	-1	-4	0
23	Community spirit and friendship with people of similar age and outlook	1	3	0
24	You have your own home with your own front door	2	1	6
25	In a nice area with attractive surroundings	-1	-1	0
26	Being seen as form of care home	-3	-4	-2
27	Freedom to live as you choose: no requirement to join in or conform	2	6	1
28	Independent living	0	6	3
29	Able to have your say and raise matters with senior management	1	2	-1
30	Residents are engaged and able to exercise choice and control	0	-1	0
31	Residents are treated with dignity and respect	5	3	3
32	Some other residents behave badly	-6	-4	-6
33	Residents take control and assume responsibility for organising things	-1	0	-4
34	People don't respect privacy or confidentiality	-5	-5	-6
35	Gossip spreads quickly	-5	-6	-5
36	Residents with dementia or who need to be looked after	-4	-2	-2
37	Living in close proximity to others in a compact community	-1	-3	-4
38	Small flats	-4	-5	-5
39	Properties and facilities that are modern and well-designed	0	-1	0
40	Buildings and gardens are kept clean and tidy	-1	0	-1
41	Contemporary kitchens and bathrooms	-1	-1	1
42	Checks on fire, electrical, gas, asbestos and water safety	1	1	2
43	Everyone kept informed and up to date about local plans and activities	-2	1	1
44	Information about costs and charges is correct, clear and comprehensive	0	0	2
45	Wide doors, that are easy to open, for people with reduced mobility	4	-2	4
46	A reliable lift	2	0	4
47	A suitable storage area for buggies and other large items	-2	1	-2
48	Good staff who provide consistency of service	3	-1	2
49	Common lounge used by external organisations and groups	-4	-2	-2
50	Guest room available for visitors	-2	0	1
51	Care staff on-site 24 hours 7 days a week if needed (EC)	6	4	1
52	An on-site restaurant (EC)	4	1	-1
53	Hairdressing salon on-site (EC)	-3	-1	-2
54	An accessible bath for those that want or need it (EC)	-3	-2	-1

## Extra Care Site 4

### Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7	8	9
EC4 res1	100	66	67	47	37	71	52	71	64
EC4 res2	66	100	71	55	51	46	64	63	52
EC4 res3	67	71	100	37	39	57	59	70	61
EC4 res4	47	55	37	100	13	28	32	34	27
EC4 res5	37	51	39	13	100	24	64	48	41
EC4 res6	71	46	57	28	24	100	37	77	59
EC4 res7	52	64	59	32	64	37	100	62	47
EC4 res8	71	63	70	34	48	77	62	100	72
EC4 res9	64	52	61	27	41	59	47	72	100

**Two factors were identified from the sorts of the 9 Extra Care resident participants at Site 4.**

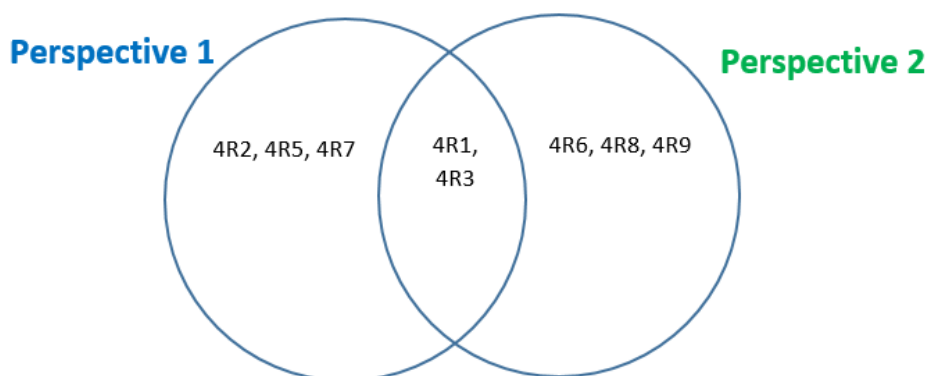
Search for 7 Factors provides 63% explanation of variation, but with significant loadings on just three Factors and one of these had only one defining sort.

Search for 3 Factors provides 65% explanation of variation and significant loadings on all three Factors but two of these had just one defining sort each.

Search for 2 Factors provides 62% explanation of variation and both Factors have three significant loadings. One sort did not load significantly on either Factor and two sorts were confounded, but there were multiple distinguishing statements identified to distinguish between the two Factors so this was selected as basis for analysis.

F1	F2	F3	F4	F5	F6	F7	C (2)	NS (1)
-	5, 7	6, 8, 9	4	-	-	-	1, 2	3
<b>F1</b>	2, 7		<b>F2</b>			<b>F3</b>	<b>C (2)</b>	<b>NS (3)</b>
			6		1	-	3, 8	4, 5, 9
	<b>F1</b>				<b>F2</b>		<b>C (2)</b>	<b>NS (1)</b>
	2, 5, 7				6, 8, 9		1, 3	4

### Distribution of Extra Care Site 4 Sorts across Two Perspectives



**Non-Significant:** 4R4

## Factor Matrix with an X Indicating a Defining Sort

QSORT	1	2	
EC4 res1	0.5150	0.6784	Confounded
EC4 res2	0.8747X	0.2872	
EC4 res3	0.5824	0.5649	Confounded
EC4 res4	0.3691	0.2685	No significant loadings over 0.5
EC4 res5	0.5098X	0.2351	
EC4 res6	0.1500	0.8319X	
EC4 res7	0.7677X	0.2527	
EC4 res8	0.4887	0.7685X	
EC4 res9	0.3906	0.6494X	
Expl.Var.%	31	31	

## Correlations Between Factor Scores

	1	2
1	1.0000	0.6154
2	0.6154	1.0000

### Extra Care Site 4 Perspective 1 – Living Independently in Your Own Home

This perspective prioritises having their own home (#24: +6) with security of tenure (#14: +3) and access to a manager they can turn to for help and advice (#1: +6) who is not only employed on a part-time basis (#3: -6). They value having good staff who provide consistency of service (#48: +4) but do not see access to care staff (#51: +2) or the ability to summons help in an emergency (#21: +2) as being of prime importance. They do not want to live only with people of a similar age and outlook (#11: -2) or consider that occupation should be restricted to only retired people aged over 65 (#12: -3).

This perspective also wants independent living (#28: +5), where they can have their say with senior managers (#29: +5) and want residents to be able to take control and assume responsibility for organising things (#33: +3). They want correct, clear and comprehensive information about costs and charges (#44: +3) and to know that checks have been made on fire, electrical, gas, asbestos and water safety (#42: +4).

### Extra Care Site 4 Perspective 2 – Safe in an Age Specific Setting with Care On-Call

This perspective wants to feel safe and secure (#17: +6) and relies upon having care staff on site 24 hours a day 7 days a week (#51: +6) that they can summons for help in an emergency (#21: +4) as well as a manager to turn to for help and advice (#1: +5). They are less concerned about having their own home and front door (#24: +1) or about maintaining independent living (#28: +2). They do not want to worry about repairs and maintenance (#5: +4) but it is less important for repairs and problems to be fixed quickly (#6: +1).

**This perspective thinks that occupation should be restricted to retired older people aged over 65 (#12: +4) and think it is better to live with others of a similar age and outlook (#11: +2). They value having a communal lounge (#9: +3) but are less concerned to have social events and activities to get involved in (#19: +1) and have little interest in other communal facilities such as a restaurant (#52: 0), on-site hairdressing salon (#53: 0) or laundry (#15: -1). They do not particularly want to have residents who are living with dementia and who need to be looked after (#36: -2), but are most opposed to residents having dogs, cats or other pets (#13: -6).**

### Extra Care Site 4 Factor Arrays

No.	Statement	1	2
1	A court manager to turn to if you need help and advice	6	5
2	A resident manager or warden who lives on-site	-3	-3
3	A court manager who is only employed on a part-time basis	-6	-4
4	Close to shops, amenities and transport	0	2
5	No need to worry about maintenance and repairs	-1	4
6	Repairs or problems are addressed and fixed quickly	0	1
7	The appearance of the Court creates a good impression	0	-1
8	Companionship of neighbours so you are never lonely	0	0
9	Use of a communal lounge and other shared facilities	0	3
10	Peace of mind that comes from being looked after	1	-1
11	Living around people of a similar age and outlook	-2	2
12	Occupancy restricted to only retired people aged over 65	-3	4
13	Residents are able to have dogs, cats or other pets	-1	-6
14	Having security of tenure	3	0
15	A communal laundry room with washers and dryers	-1	-1
16	An effective and efficient heating and hot water system	1	0
17	Feeling safe and secure	3	6
18	A garden or balcony so you can sit out in private	-3	-1
19	Social events and activities to get involved in	2	1
20	Availability of a good internet connection and/or wifi	0	-3
21	Pull-cord or pendant to summon help in an emergency	2	4
22	Sufficient car parking spaces	-1	-2
23	Community spirit and friendship with people of similar age and outlook	2	1
24	You have your own home with your own front door	6	1
25	In a nice area with attractive surroundings	-2	1
26	Being seen as form of care home	-6	-4
27	Freedom to live as you choose: no requirement to join in or conform	1	3
28	Independent living	5	2
29	Able to have your say and raise matters with senior management	5	-1
30	Residents are engaged and able to exercise choice and control	0	0
31	Residents are treated with dignity and respect	4	5
32	Some other residents behave badly	-5	-5
33	Residents who take control and assume responsibility for organising things	3	-2
34	People don't respect privacy or confidentiality	-4	-5
35	Gossip spreads quickly	-4	-6
36	Residents with dementia or who need to be looked after	1	-2
37	Living in close proximity to others in a compact community	-2	-3
38	Small flats	-5	-4
39	Properties and facilities that are modern and well-designed	-1	-2
40	Buildings and gardens are kept clean and tidy	1	1
41	Contemporary kitchens and bathrooms	-2	0
42	Checks on fire, electrical, gas, asbestos and water safety	4	1
43	Everyone is kept informed and up to date about local plans and activities	-1	2
44	Information about costs and charges is correct, clear and comprehensive	3	0
45	Wide doors, that are easy to open, for people with reduced mobility	2	3
46	A reliable lift	1	3
47	A suitable storage area for buggies and other large items	0	-1
48	Good staff who provide consistency of service	4	2
49	Common lounge used by external organisations and groups	-2	-3
50	Guest room available for visitors	-3	-2
51	Care staff on-site 24 hours 7 days a week if needed (EC)	2	6
52	An on-site restaurant (EC)	1	0
53	Hairdressing salon on-site (EC)	-1	0
54	An accessible bath for those that want or need it (EC)	-4	-1

## Extra Care Site 5

### Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21
EC5 res1	100	56	57	38	53	52	43	62	67	70	66	42	26	69	60	57	44	53	53	64	56
EC5 res2	56	100	45	34	62	48	44	52	64	70	56	53	17	62	43	71	38	35	53	70	67
EC5 res3	57	45	100	42	52	43	34	56	68	61	81	46	8	66	55	61	40	46	61	67	58
EC5 res4	38	34	42	100	41	34	15	25	35	45	45	32	23	38	30	35	42	7	27	26	35
EC5 res5	53	62	52	41	100	62	35	61	53	65	63	55	30	60	46	60	55	44	60	63	68
EC5 res6	52	48	43	34	62	100	42	59	51	56	55	64	23	60	57	60	61	63	52	59	68
EC5 res7	43	44	34	15	35	42	100	54	45	49	47	32	-1	28	61	48	27	56	57	65	58
EC5 res8	62	52	56	25	61	59	54	100	60	64	67	51	23	70	67	48	40	53	50	73	68
EC5 res9	67	64	68	35	53	51	45	60	100	77	72	51	10	74	55	70	45	58	66	73	69
EC5 res10	70	70	61	45	65	56	49	64	77	100	76	62	30	79	61	74	53	52	63	69	74
EC5 res11	66	56	81	45	63	55	47	67	72	76	100	62	20	77	61	73	42	65	70	75	73
EC5 res12	42	53	46	32	55	64	32	51	51	62	62	100	34	59	42	55	52	56	54	58	66
EC5 res13	26	17	8	23	30	23	-1	23	10	30	20	34	100	28	6	19	18	22	11	18	25
EC5 res14	69	62	66	38	60	60	28	70	74	79	77	59	28	100	55	69	45	46	53	70	66
EC5 res15	60	43	55	30	46	57	61	67	55	61	61	42	6	55	100	46	41	57	53	67	65
EC5 res16	57	71	61	35	60	60	48	48	70	74	73	55	19	69	46	100	56	52	58	61	65
EC5 res17	44	38	40	42	55	61	27	40	45	53	42	52	18	45	41	56	100	50	55	35	48
EC5 res18	53	35	46	7	44	63	56	53	58	52	65	56	22	46	57	52	50	100	68	67	69
EC5 res19	53	53	61	27	60	52	57	50	66	63	70	54	11	53	53	58	55	68	100	70	67
EC5 res20	64	70	67	26	63	59	65	73	73	69	75	58	18	70	67	61	35	67	70	100	83
EC5 res21	56	67	58	35	68	68	58	68	69	74	73	66	25	66	65	65	48	69	67	83	100

Three factors were identified from the sorts of the 21 Extra Care resident participants at Site 5.

Search for 7 Factors provides 68% explanation of variation, with significant loadings on six Factors but four of these had only one defining sort.

Search for 6 Factors provides 64% explanation of variation, but significant loadings on only four Factors and one of these had just one defining sort.

Search for 4 Factors provides 62% explanation of variation, but significant loadings on three Factors each with a minimum of four significant loadings. There were three sorts that did not load significantly on any Factor and two sorts were confounded. The three Factors identified were selected as the basis for analysis.

<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>F6</b>	<b>F7</b>	<b>C (2)</b>	<b>NS (4)</b>
2, 3, 9, 10, 11, 14, 16, 19	7, 18, 21	4	12	17	-	8	15, 20	1, 5, 6, 13
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>F6</b>	<b>C (2)</b>	<b>NS (3)</b>	
1, 2, 3, 9, 10, 11, 14, 16	7, 8, 15, 18, 21	-	5, 12	17	-	20	4, 6, 13, 19	
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>C (2)</b>	<b>NS (3)</b>			
7, 15, 18, 21	1, 2, 3, 9, 10, 11, 14, 16	-	5, 6, 12, 17	8, 20	4, 13, 19			

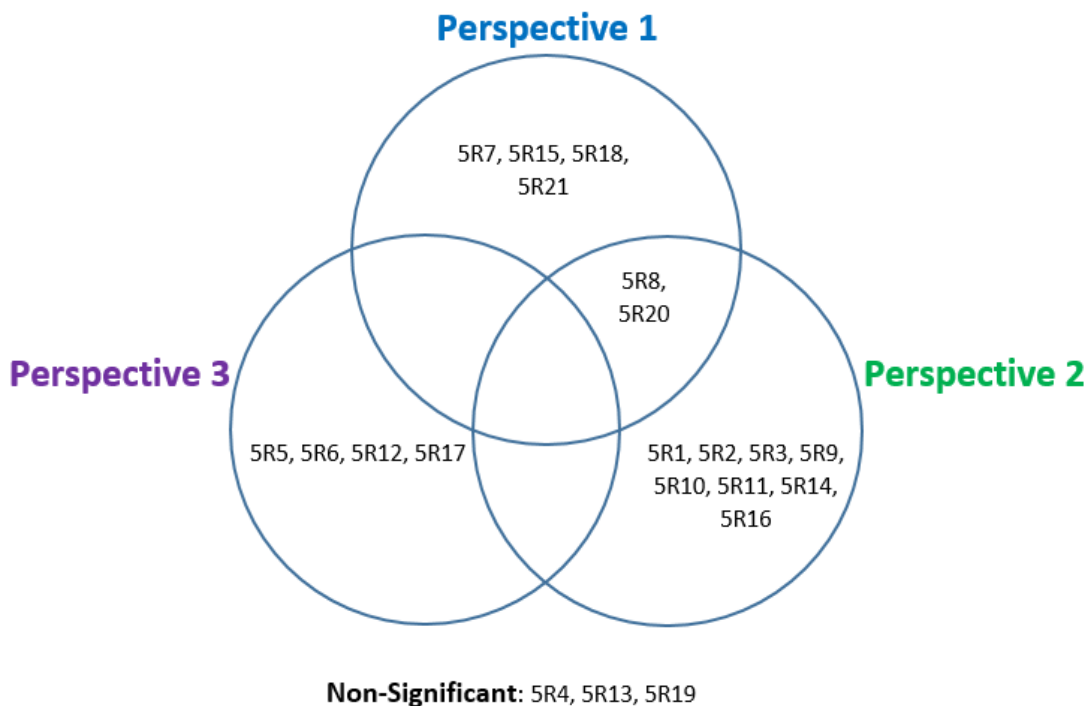
### Factor Matrix with an X Indicating a Defining Sort

QSORT	1	2	3	
EC5 res1	0.3731	0.6289X	0.2498	
EC5 res2	0.3060	0.5992X	0.3020	
EC5 res3	0.3344	0.6395X	0.2234	
EC5 res4	-0.0354	0.4397	0.3747	No significant loadings over 0.5
EC5 res5	0.3337	0.4534	0.5379X	
EC5 res6	0.4230	0.3100	0.6065X	
EC5 res7	0.8054X	0.2112	0.0214	
EC5 res8	0.5292	0.5238	0.2446	Confounded on Factors 1 and 2
EC5 res9	0.4059	0.7097X	0.2167	
EC5 res10	0.3180	0.7491X	0.4032	
EC5 res11	0.4239	0.6844X	0.3540	
EC5 res12	0.3454	0.3317	0.5974X	
EC5 res13	-0.0068	0.1201	0.3844	No significant loadings over 0.5
EC5 res14	0.2658	0.7758X	0.3115	
EC5 res15	0.6462X	0.4059	0.1670	
EC5 res16	0.2680	0.6673X	0.4023	
EC5 res17	0.2591	0.2273	0.6373X	
EC5 res18	0.6869X	0.2122	0.3841	
EC5 res19	0.4837	0.4606	0.3792	No significant loadings over 0.5
EC5 res20	0.6676	0.5645	0.2258	Confounded on Factors 1 and 2
EC5 res21	0.6086X	0.4657	0.4518	
% expl.Var.	20	27	15	

### Correlations Between Factor Scores

	1	2	3
1	1.0000	0.7020	0.6527
2	0.7020	1.0000	0.7437
3	0.6527	0.7437	1.0000

### Distribution of Extra Care Site 5 Sorts across Three Perspectives





### Extra Care Site 5 Perspective 1 – Freedom and Security of Home with Mobility

This perspective wants the freedom to live as they choose (#27: +5) in their own home with its own front door (#24: +6). This ensures they feel safe and secure (#17: +6) with security of tenure (#14: +4), but without needing to be looked after (#10: -1).

Having access to care staff (#51: +2), a court manager (#1: +3) or being able to summons help in an emergency (#21: 0) are not their top priorities. They are not seeking companionship from their neighbours (#8: -1), or assurance and community from living around people of a similar age and outlook (#11: -1; #23: 0). They definitely do not think occupation should be restricted only to retired people aged over 65 (#12: -5). They are not particularly interested in having social events and activities to get involved in (#19: +1) and hence do not see the advantage of having a communal lounge (#9: -2). Nor are they supportive of other communal facilities including the laundry (#15: -2), on-site hairdressing salon (#53: -3), restaurant (#52: -1) or buggy store (#47: -2).

They do want to have an effective and efficient heating system (#16: +4) and to know that maintenance and repairs will be done (#5: +1) and problems fixed quickly (#6: +2). This perspective wants to have mobility provided by a reliable lift (#46: +5), wide door that are easy to open (#47: +3) and even an accessible bath (#54: +1). They also want to be close to shops, amenities and transport (#4: +1) and have sufficient spaces for car parking (#22: +3). This perspective has a slight preference for allowing residents to have dogs, cats or other pets (#13: +1), but less tolerance for residents living with dementia or needing to be looked after (#36: -3).

### Extra Care Site 5 Perspective 2 – Care, Support and Dignity

This perspective wants care staff on-site 24 hours a day 7 days a week (#51: +6) and to be able to summons them in an emergency with a pull-cord or pendant (#21: +6). They want a court manager to turn to for help and advice (#1: +5), to feel safe and secure (#17: +5) and to have peace of mind from being looked after (#10: +3). They want to know that checks are carried out on fire, electrical, gas, asbestos and water safety.

They also want to live independently (#28: +4) in their own home (#24: +4) whilst also being treated with dignity and respect (#31: +4). They do not mind residents living with dementia and who need to be looked after (#36: +2) but they object to residents with dogs, cats or other pets (#13: -3).

### Extra Care Site 5 Perspective 3 – Safe, Independent, Informed and Social

This perspective wants to be both safe and secure (#17: +6) and able to live independently (#28: +6). They are only moderately concerned about the availability of care staff (#51: +3) or a court manager (#1: +3) or about being able to summons help in an emergency (#21: +2). It is important that they have their own home with its own front door (#24: +5) but they also want to be able to exercise choice and control (#30: +4) and to have their say with senior managers (#29: +4). They want to take responsibility for organising things (#33: +2).

**This perspective enjoys having social events to get involved in (#19: +4) so want to know and be informed about local plans and activities (#43: +5). They are not interested in having wide doors (#45: 0) a lift (#46: -1) or a buggy store (#47: -4). Although they do not seem to think that there is a benefit in occupation being restricted to only retired people aged over 65 (#12: -2) or want to live with people of a similar age and outlook (#11: 0) they do consider this can help create friendships and community spirit (#23: +3). They are though not supportive of residents living with dementia and in need of being looked after (#36: -3) or of residents with dogs, cats or other pets (#13: -4).**

### Extra Care Site 5 Factor Arrays

No.	Statement	1	2	3
1	A court manager to turn to if you need help and advice	3	5	3
2	A resident manager or warden who lives on-site	-3	-2	-3
3	A court manager who is only employed on a part-time basis	-4	-4	-4
4	Close to shops, amenities and transport	1	-1	-2
5	No need to worry about maintenance and repairs	1	0	-1
6	Repairs or problems are addressed and fixed quickly	2	1	-2
7	The appearance of the Court creates a good impression	-1	1	3
8	Companionship of neighbours so you are never lonely	-1	-2	0
9	Use of a communal lounge and other shared facilities	-2	1	0
10	Peace of mind that comes from being looked after	-1	3	1
11	Living around people of a similar age and outlook	-1	-1	0
12	Occupancy restricted to only retired people aged over 65	-5	-3	-2
13	Residents are able to have dogs, cats or other pets	1	-3	-4
14	Having security of tenure	4	-1	2
15	A communal laundry room with washers and dryers	-2	1	-1
16	An effective and efficient heating and hot water system	4	2	1
17	Feeling safe and secure	6	5	6
18	A garden or balcony so you can sit out in private	0	-1	0
19	Social events and activities to get involved in	1	0	4
20	Availability of a good internet connection and/or wifi	0	-2	-1
21	Pull-cord or pendant to summon help in an emergency	0	6	2
22	Sufficient car parking spaces	3	-3	-3
23	Community spirit and friendship with people of similar age and outlook	0	0	3
24	You have your own home with your own front door	6	4	5
25	In a nice area with attractive surroundings	1	1	2
26	Being seen as form of care home	-5	-5	-5
27	Freedom to live as you choose: no requirement to join in or	5	2	1
28	Independent living	2	4	6
29	Able to have your say and raise matters with senior management	3	0	4
30	Residents are engaged and able to exercise choice and control	2	-2	4
31	Residents are treated with dignity and respect	2	4	1
32	Some other residents behave badly	-6	-5	-5
33	Residents who take control and assume responsibility for organising things	-1	-2	2
34	People don't respect privacy or confidentiality	-6	-6	-6
35	Gossip spreads quickly	-4	-6	-6
36	Residents with dementia or who need to be looked after	-3	2	-3
37	Living in close proximity to others in a compact community	-2	-3	-3
38	Small flats	-4	-4	-2
39	Properties and facilities that are modern and well-designed	0	1	1
40	Buildings and gardens are kept clean and tidy	0	2	1
41	Contemporary kitchens and bathrooms	-1	-1	-1
42	Checks on fire, electrical, gas, asbestos and water safety	0	3	0
43	Everyone is kept informed and up to date about local plans and activities	0	1	5
44	Information about costs and charges is correct, clear and comprehensive	1	-1	0
45	Wide doors, that are easy to open, for people with reduced mobility	3	3	0
46	A reliable lift	5	2	-1
47	A suitable storage area for buggies and other large items	-2	0	-4
48	Good staff who provide consistency of service	4	3	2
49	Common lounge used by external organisations and groups	-3	-1	-1
50	Guest room available for visitors	-2	0	-1
51	Care staff on-site 24 hours 7 days a week if needed (EC)	2	6	3
52	An on-site restaurant (EC)	-1	0	1
53	Hairdressing salon on-site (EC)	-3	0	0
54	An accessible bath for those that want or need it (EC)	1	-4	-2

## **Appendix 10**

### **Correlations between Extra Care Q Sorts**

*Array of the correlations between the individual Q sorts produced by each of the 68 Extra Care participants.*



## **Appendix 11**

### **Retirement Housing Combined Results**

*Extract from the results produced by PQ Method for Combined Retirement Housing Study.*

# RH Combined Results from PQ Method

## Factor Matrix with an X Indicating a Defining Sort

QSORT	1	2	3	4	QSORT	1	2	3	4
1 Ires1	0.5412X	0.3218	0.3179	0.1231	80 Bres1	0.4857	0.2071	0.2411	0.3414
2 Ires2	0.5130X	0.2293	0.3312	0.4550	81 Bres2	0.5405X	0.1885	0.1020	0.2755
3 Ires3	0.3402	0.2986	0.3239	-0.0694	82 Bres3	0.0207	0.6814X	0.4088	0.0716
4 Ires4	0.5197X	0.3147	0.3429	0.0091	83 Bres4	0.3911	-0.0650	0.5259X	0.1666
5 Ires5	0.4401	0.3182	0.0279	0.1789	84 Bres5	0.5664X	0.2550	0.2520	0.2064
6 Ires6	0.2609	0.6743X	0.2621	0.1061	85 Bres6	0.5189X	0.3225	0.3940	0.1403
7 Ires7	0.0637	0.7082X	-0.0521	0.2665	86 Bres7	0.5433X	0.3489	0.1807	0.2959
8 Ires8	0.3120	0.3905	0.5010X	0.2990	87 Bres8	0.2686	0.2678	0.4575	0.2709
9 Ires9	0.4363	0.2602	0.5566X	0.0250	88 Bres9	0.1166	0.1340	0.4456	0.2766
10 Ires10	-0.0866	0.3650	0.1815	-0.0295	89 Bres10	0.4324	0.3617	0.5013X	0.2713
11 Ares1	0.3583	0.4365	0.3083	0.4155	90 Bres11	0.4245	0.0816	0.4316	0.5302X
12 Ares2	0.3623	0.5086X	0.4843	0.2619	91 Bres12	0.4796	-0.0427	0.2830	0.5745X
13 Ares3	0.3971	0.6524X	0.2580	0.1762	92 Bres13	0.3143	0.6443X	0.1188	0.2488
14 Ares4	0.3163	0.3898	0.4348	0.1122	93 Bres14	0.1313	0.3034	0.2383	0.5284X
15 Ares5	0.2277	0.3528	0.4499	0.0745	94 Bres15	0.2754	0.1020	0.6696X	0.1587
16 Ares6	0.6136X	0.0065	0.3069	0.4148	95 Bres16	0.3859	0.5559X	0.2018	0.3017
17 Ares7	0.4418	0.6286X	-0.0121	0.0623	96 Bres17	0.1560	0.2522	0.0710	0.2710
18 Ares8	0.1611	0.5949X	0.3974	0.1579	97 Bres18	0.0640	0.3546	0.4970	0.1090
19 Ares9	0.4614	0.3923	0.4533	-0.1216	98 Hres1	0.3066	0.5134	0.3029	0.5315
20 Ares10	0.2114	0.2906	0.4627	0.3016	99 Hres2	0.3736	0.1369	0.2743	0.5092X
21 Kres1	0.1858	0.6318X	0.3078	0.2767	100 Hres3	0.5216X	0.0395	0.3531	0.4937
22 Kres2	0.3272	0.3376	0.1578X	0.3112	101 Hres4	0.5787	0.0216	0.5837	0.1735
23 Kres3	-0.2796	0.7696X	0.2853	0.1380	102 Hres5	0.4811	0.3204	0.2817	0.3528
24 Kres4	0.2434	0.4391	0.2066	0.4100	103 Hres6	0.5908X	0.3992	0.1271	0.2473
25 Kres5	0.1258	0.4333	0.3198	0.3989	104 Hres7	0.6772X	0.1751	0.4259	0.1357
26 Kres6	-0.0006	0.2920	0.4726	0.2093	105 Hres8	0.3794	0.2556	0.5007X	0.3038
27 Kres7	0.5270X	0.1076	0.2550	0.4483	106 Hres9	0.7026X	0.1409	0.4633	0.1900
28 Kres8	0.2276	0.5710X	0.2209	0.2901	107 Hres10	0.4011	0.5469X	0.2385	0.1766
29 Kres9	0.3315	0.2602	0.4438	0.2882	108 Hres11	0.2523	0.2310	0.5354X	0.2971
30 Kres10	0.4661	0.3629	0.5753X	0.2359	109 Hres12	0.3677	-0.0154	0.2931	0.2764
31 Kres11	0.3202	0.2640	0.5155X	0.1130	110 Hres13	0.4363	0.4151	0.1091	0.3812
32 Kres12	0.5796X	0.0496	0.2145	0.1398	111 Hres14	0.5388X	0.0214	-0.0641	0.2005
33 Kres13	0.1540	0.1382	0.6367	0.0808	112 Dres1	0.6520X	0.3974	0.2380	0.1025
34 Jres1	0.2942	0.6263X	0.3216	0.2163	113 Dres2	0.4328	0.4888	0.2771	0.2915
35 Jres2	0.3262	0.4648	0.0132	0.2386	114 Dres3	0.3020	0.3967	0.5344X	0.2887
36 Jres3	0.4098	0.0570	0.4673	0.3890	115 Dres4	0.1950	0.1562	0.5441X	0.2709
37 Jres4	0.2642	0.5270	0.5306	0.2770	116 Dres5	0.3521	0.3025	0.5307X	0.0260
38 Jres5	0.1242	0.3776	0.2441	0.3456	117 Dres6	0.2748	0.5535X	0.3793	0.1891
39 Jres6	0.0262	0.4959	0.5321X	0.3844	118 Dres7	0.2146	0.1803	0.3252	0.3411
40 Jres7	0.2148	0.3700	0.5838X	0.3681	119 Dres8	0.3061	0.0732	0.6274X	0.0609
41 Jres8	0.5862	0.5536	0.0976	0.2096	120 Dres9	0.2237	0.3288	0.6104X	0.3600
42 Jres9	0.6789X	0.1853	0.2341	0.2005	121 Dres10	0.4751	0.3050	0.2159	0.5979X
43 Jres10	0.2330	0.6612X	0.1195	0.0825	122 Dres11	-0.1491	0.3059	0.3690	0.1757
44 Jres11	0.3492	0.2760	0.0585	0.2204	123 Dres12	0.3227	0.2979	0.4834	0.4573
45 Jres12	0.3214	0.5298	0.4313	0.1789	124 Dres13	0.2838	0.1459	0.4337	0.0577
46 Jres13	0.2342	0.2285	0.6948X	0.2413	125 Dres14	0.4219	0.3915	0.4067	0.3081
47 Jres14	0.5605X	0.0470	0.2371	0.4111	126 Dres15	0.4267	0.1924	0.2489	0.4062
48 Jres15	0.5949	0.5259	0.2026	0.3752	127 Dres16	0.6018X	0.3892	0.3091	0.0689
49 Jres16	0.3924	0.0080	0.3819	0.4582	128 Fres1	0.0595	0.5426X	0.0541	0.1411
50 Jres17	0.6155X	-0.0282	0.0800	0.2291	129 Fres2	0.1639	0.3919	0.2945	0.2763
51 Jres18	0.4965	0.2962	0.6233X	0.3451	130 Fres3	0.3316	0.6246X	0.0130	0.2988
52 Jres19	0.5372	0.0103	0.5171	-0.0047	131 Fres4	0.5086	0.4105	0.0467	0.5450
53 Jres20	0.3951	0.4762	0.2857	0.0655	132 Fres5	-0.0340	0.5721X	0.0962	0.2229
54 Jres21	0.5177X	0.2304	0.3876	0.2921	133 Fres6	0.1347	0.3704	0.4014	0.3716
55 Jres22	0.2879	0.4265	0.3008	0.3420	134 Fres7	0.0065	0.3399	0.6608X	0.1229
56 Jres23	0.0968	0.4627	0.4545	0.5364X	135 Fres8	0.2640	0.3373	0.1217	0.5596X
57 Jres24	0.4291	0.1684	0.4545	0.3452	136 Fres9	0.3234	0.3970	0.1956	0.5615X
58 Cres1	0.2627	0.6207X	0.1129	0.1195	137 Fres10	0.1329	0.3520	0.5637X	0.0961
59 Cres2	0.3118	0.6491X	0.4403	0.0554	138 Fres11	0.5527X	0.3819	0.0020	0.2207
60 Cres3	0.3831	0.1800	0.2169	0.2302	139 Fres12	0.1798	0.1185	0.2363	0.5045X
61 Cres4	0.0253	0.6354X	0.3066	0.4250	140 Fres13	0.3611	0.4135	-0.0448	0.2932
62 Cres5	0.0941	0.7613X	0.1892	0.1524	141 Fres14	0.1758	0.2973	0.3411	0.3681
63 Cres6	0.3160	0.4815	0.3424	0.1758	142 Fres15	0.3945	0.4534	0.3309	0.4753
64 Cres7	0.2504	0.6135X	0.2845	0.2272	143 Fres16	0.3038	0.3082	0.1659	0.4665
65 Cres8	0.0512	0.2945	0.5046X	0.1977	144 Fres17	-0.0896	0.1247	0.3407	0.3316
66 Cres9	0.5532X	0.4015	0.4204	0.1763	145 Fres18	0.1291	0.3667	0.2625	0.4667
67 Gres1	0.2688	0.3044	0.3265	0.3211	146 Fres19	0.1819	0.3800	0.2453	0.4167
68 Gres2	0.1696	0.6643X	0.3572	0.1235	147 Fres20	0.0310	0.0894	0.0447	0.3832
69 Gres3	0.3921	0.4927	0.2508	0.3248	148 Fres21	0.3162	0.2238	0.1269	0.6346X
70 Gres4	0.1329	0.2758	0.3873	0.5542X	149 Eres1	0.3115	0.4214	0.2327	0.5224X
71 Gres5	0.4063	0.3322	0.5036X	0.3162	150 Eres2	0.6312X	0.2472	0.2402	0.2714
72 Gres6	0.3783	0.3043	0.1235	0.4229	151 Eres3	0.5078X	0.1810	0.1856	0.3541
73 Gres7	0.2959	0.1850	0.1631	0.2941	152 Eres4	0.4960	0.1736	0.3378	0.2227
74 Gres8	0.4459	0.0501	0.2615	0.5918X	153 Eres5	0.2175	0.2284	0.0504	0.6138X
75 Gres9	0.2746	-0.0413	0.5191	0.4169X	154 Eres6	0.5078X	0.1810	0.1856	0.3541
76 Gres10	0.2795	0.1341	0.2665	0.6334X	155 Eres7	0.2499	0.1152	-0.0235	0.5191X
77 Gres11	0.0594	-0.0556	0.4618	0.2484	156 Eres8	0.1620	0.3852	0.1814	0.5067X
78 Gres12	0.1610	0.2659	0.2664	0.4850	157 Eres9	0.2693	0.3152	0.1436	0.2915
79 Cres13	0.5317X	0.1435	0.2315	0.3522	% expl.Var.	14	14	13	11

**Four Factors were identified from the sorts of the 157 Retirement Housing resident participants.**

Search for 7 Factors provides 56% explanation of variation, but significant loadings on only six out of seven Factors and two of these had just three defining sorts.

Search for 6 Factors provides 55% explanation of variation, but significant loadings on only five out of six Factors.

Search for 5 Factors provides 52% explanation of variation but significant loadings on only four out of five Factors.

Search for 4 Factors provides 52% explanation of variation and significant loadings on all four Factors and no Factor had less than 18 defining sorts. There were though still fifty five sorts that did not load significantly on any of the Factors and seven sorts were confounded on more than one Factor at a 0.5 significance level. This was though selected as basis for analysis

<b>F1</b> A9, B5, B6, D1, D16, E2, E3, E6, H6, H7, H9, I1, I2, I4, I5, I9, J9, J14, J17, K12	<b>F2</b> A3, A7, A8, B3, B13, B16, C1, C4, C5, C7, E1, F3, F13, G2, G3, H1, I6, I7, J1, J2, J8, J10, J12, K1, K8	<b>F3</b> A10, B4, B8, B10, B15, D4, D8, D9, F7, G9, G11, H4, J6, J7, J13, J18, K10, K13	<b>F4</b> B12, D10, E5, E7, F4, F8, F21, G8, G10, H2, J23	<b>F5</b> -	<b>F6</b> B1, B7, H14,	<b>F7</b> F6, F10, K11	<b>C (4)</b> C2, J15, J19, K3	<b>NS (73)</b> A1, A2, A4, A5, A6, B2, B9, B11, B14, B17, B18, C3, C6, C8, C9, D2, D3, D5, D6, D7, D11, D12, D13, D14, D15, E4, E8, E9, F1, F2, F5, F9, F11, F12, F14, F15, F16, F17, F18, F19, F20, G1, G4, G5, G6, G7, G12, G13, H3, H5, H8, H10, H11, H12, H13, I3, I8, I10, J3, J4, J5, J11, J16, J20, J21, J22, J24, K2, K4, K5, K6, K7, K9
<b>F1</b> A6, B2, B5, B6, B7, C9, C13, D1, D16, E2, H3, H6, H7, H9, H14, I1, I4, J9, J14, J15, J17, J19, J21, K12	<b>F2</b> A3, A7, A8, B3, B13, B16, C1, C2, E1, F1, F3, G2, G3, H1, I7, J1, J2, J10, J12, J20, K8	<b>F3</b> A10, B4, B8, B10, B15, B18, D4, D8, D9, F7, G9, J6, J7, J13, K10, K13	<b>F4</b> B11, B12, D10, E5, E7, F4, F8, F9, F21, G8, G10, H2, J23	<b>F5</b> -	<b>F6</b> A5, D2, D3, F6, H10	<b>C (5)</b> H4, I6, J8, J18, K3	<b>NS (69)</b> A1, A2, A4, A9, B1, B9, B14, B17, C3, C6, C8, D5, D6, D7, D11, D12, D13, D14, D15, E3, E4, E6, E8, E9, F2, F5, F10, F11, F12, F13, F14, F15, F16, F17, F18, F19, F20, G1, G4, G5, G6, G7, G11, G12, H5, H8, H11, H12, H13, I2, I3, I5, I8, I9, I10, J3, J4, J5, J11, J16, J22, J24, K1, K2, K4, K5, K6, K9, K11	
<b>F1</b> A6, B2, B5, B6, B7, C9, C13, D1, D16, E2, E3, E6, F11, H3, H6, H7, H9, H14, I1, I2, I4, J9, J14, J17, J21, K7, K12	<b>F2</b> A2, A3, A7, A8, B3, B13, B16, C1, C2, C4, C5, C7, D6, F1, F3, F5, G2, H10, I6, I7, J1, J12, K1, K3, K8	<b>F3</b> B4, B10, B15, C8, D3, D4, D5, D8, D9, F7, F10, G5, H8, H11, I8, I9, J6, J7, J13, J18, K2, K10, K12, K13	<b>F4</b> B11, B12, B14, D10, E1, E5, E7, E8, F8, F9, F12, F21, G4, G8, G9, G10, H2, J23	<b>F5</b> -	<b>C (7)</b> F4, H1, H4, J4, J8, J15, J19	<b>NS (54)</b> A1, A4, A5, A9, A10, B1, B8, B9, B17, B18, C3, C6, D2, D7, D11, D12, D13, D14, D15, E4, E9, F2, F6, F13, F14, F15, F16, F17, F18, F19, F20, G1, G3, G6, G7, G11, G12, H5, H12, H13, I3, I4, I10, J2, J3, J5, J11, J16, J20, J22, J24, K4, K5, K6, K9		
<b>F1</b> A6, B2, B5, B6, B7, C9, C13, D1, D16, E2, E3, E6, F11, H3, H6, H7, H9, H14, I1, I2, I4, J9, J14, J17, J21, K7, K12	<b>F2</b> A2, A3, A7, A8, B3, B13, B16, C1, C2, C4, C5, C7, D6, F1, F3, F5, G2, H10, I6, I7, J1, J12, K1, K3, K8	<b>F3</b> B4, B10, B15, C8, D3, D4, D5, D8, D9, F7, F10, G5, H8, H11, I8, I9, J6, J7, J13, J18, K10, K12, K13	<b>F4</b> B11, B12, B14, D10, E1, E5, E7, E8, F8, F9, F12, F21, G4, G8, G9, G10, H2, J23	<b>C (7)</b> F4, H1, H4, J4, J8, J15, J19	<b>NS (55)</b> A1, A4, A5, A9, A10, B1, B8, B9, B17, B18, C3, C6, D2, D7, D11, D12, D13, D14, D15, E4, E9, F2, F6, F13, F14, F15, F16, F17, F18, F19, F20, G1, G3, G6, G7, G11, G12, H5, H12, H13, I3, I4, I10, J2, J3, J5, J11, J16, J20, J22, J24, K2, K4, K5, K6, K9			

## Correlations Between Factor Scores

	1	2	3	4
1	1.0000	0.6348	0.7775	0.7768
2	0.6348	1.0000	0.7306	0.6557
3	0.7775	0.7306	1.0000	0.7446
4	0.7768	0.6557	0.7446	1.0000

## Retirement Housing Combined Factor Arrays

No.	Statement	1	2	3	4
1	A court manager to turn to if you need help and advice	6	3	4	6
2	A resident manager or warden who lives on-site	2	-4	-4	5
3	A court manager who is only employed on a part-time basis	-6	-2	-4	-4
4	Close to shops, amenities and transport	-1	2	2	3
5	No need to worry about maintenance and repairs	2	4	2	4
6	Repairs or problems are addressed and fixed quickly	4	4	1	3
7	The appearance of the Court creates a good impression	-1	-1	1	1
8	Companionship of neighbours so you are never lonely	2	-2	4	-1
9	Use of a communal lounge and other shared facilities	2	-1	3	-1
10	Peace of mind that comes from being looked after	3	-1	1	2
11	Living around people of a similar age and outlook	-1	-2	1	1
12	Occupancy restricted to only retired people aged over 65	-3	-3	-2	5
13	Residents are able to have dogs, cats or other pets	-4	1	-3	-3
14	Having security of tenure	0	5	2	4
15	A communal laundry room with washers and dryers	1	2	1	1
16	An effective and efficient heating and hot water system	5	5	2	2
17	Feeling safe and secure	5	6	6	3
18	A garden or balcony so you can sit out in private	-3	1	-1	-2
19	Social events and activities to get involved in	0	-3	2	-2
20	Availability of a good internet connection and/or wifi	-3	1	-1	-2
21	Pull-cord or pendant to summon help in an emergency	6	1	3	2
22	Sufficient car parking spaces	-1	2	-1	-2
23	Community spirit and friendship with people of similar age and outlook	0	-2	3	0
24	You have your own home with your own front door	3	6	6	6
25	In a nice area with attractive surroundings	0	0	1	0
26	Being seen as a form of care home	-4	-6	-5	-4
27	Freedom to live as you choose: no requirement to join in or conform	0	3	4	2
28	Independent living	2	4	5	4
29	Able to have your say and raise matters with senior management	1	1	0	1
30	Residents are engaged and able to exercise choice and control	-1	0	0	-1
31	Residents are treated with dignity and respect	4	3	5	3
32	Some other residents behave badly	-6	-6	-6	-6
33	Residents take control and assume responsibility for organising things	-2	-4	-3	-2
34	People don't respect privacy or confidentiality	-5	-5	-4	-5
35	Gossip spreads quickly	-5	-5	-6	-6
36	Residents with dementia or who need to be looked after	-2	-2	-3	-1
37	Living in close proximity to others in a compact community	-2	-4	-1	-3
38	Small flats	-4	-3	-5	-5
39	Properties and facilities that are modern and well-designed	-1	1	0	-1
40	Buildings and gardens are kept clean and tidy	1	2	0	0
41	Contemporary kitchens and bathrooms	-2	0	-2	0
42	Checks on fire, electrical, gas, asbestos and water safety	3	3	-1	1
43	Everyone kept informed and up to date about local plans and activities	1	-1	0	1
44	Information about costs and charges is correct, clear and comprehensive	1	2	0	2
45	Wide doors, that are easy to open, for people with reduced mobility	1	-1	-2	0
46	A reliable lift	3	0	-2	-3
47	A suitable storage area for buggies and other large items	-2	-1	-3	-3
48	Good staff who provide consistency of service	4	0	3	0
49	Common lounge used by external organisations and groups	-3	-3	-2	-4
50	Guest room available for visitors	0	0	-1	-1



## **Appendix 12**

### **Retirement Housing Results for Sites A-K**

*Extract from the results produced by PQ Method for Retirement Housing Sites A-K.*

# Retirement Housing Site A

## Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7	8	9	10
1 A Res1	100	64	60	50	41	47	48	41	44	55
2 A Res2	64	100	65	54	58	53	46	68	55	52
3 A Res3	60	65	100	56	59	37	65	61	53	41
4 A Res4	50	54	56	100	39	47	33	54	61	36
5 A Res5	41	58	59	39	100	25	31	35	57	13
6 A Res6	47	53	37	47	25	100	19	39	27	29
7 A Res7	48	46	65	33	31	19	100	46	45	33
8 A Res8	41	68	61	54	35	39	46	100	38	49
9 A Res9	44	55	53	61	57	27	45	38	100	37
10 A Res10	55	52	41	36	13	29	33	49	37	100

Two factors were identified from the sorts of the 10 Retirement Housing resident participants at Site A.

Search for 7 Factors provides 64% explanation of variation, but significant loadings on just five out of seven Factors and two of these had just one defining sort each.

Search for 5 Factors provides 61% explanation of variation, but significant loadings on only four out of five Factors and one of these had just one defining sort.

Search for 4 Factors provides 55% explanation of variation, but significant loadings on just three out of four Factors and one of these had only one defining sort.

Search for 3 Factors provides 57% explanation of variation and significant loadings on all three Factors but one of these had just one defining sort.

Search for 2 Factors provides 52% explanation of variation and significant loadings on both Factors with five defining sorts for one and three defining sorts for the other Factor, although two sorts were confounded on both Factors at a 0.5 significance level. Selected as basis for analysis

<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>F6</b>	<b>F7</b>	<b>C</b>	<b>NS</b>
5, 9	6	3, 7	-	10	2	-	-	1, 4, 8
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>C</b>	<b>NS</b>		
5, 9	2, 6, 8	3, 7	-	10	-	1, 4		
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>C</b>	<b>NS</b>			
5, 9	2, 6, 10	7	-	3	1, 4, 8			
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>C</b>	<b>NS</b>				
4, 5, 9	2, 6, 8, 10	7	3	1				
<b>F1</b>	<b>F2</b>	<b>C</b>	<b>NS</b>					
3, 4, 5, 7, 9	6, 8, 10	1, 2	-					

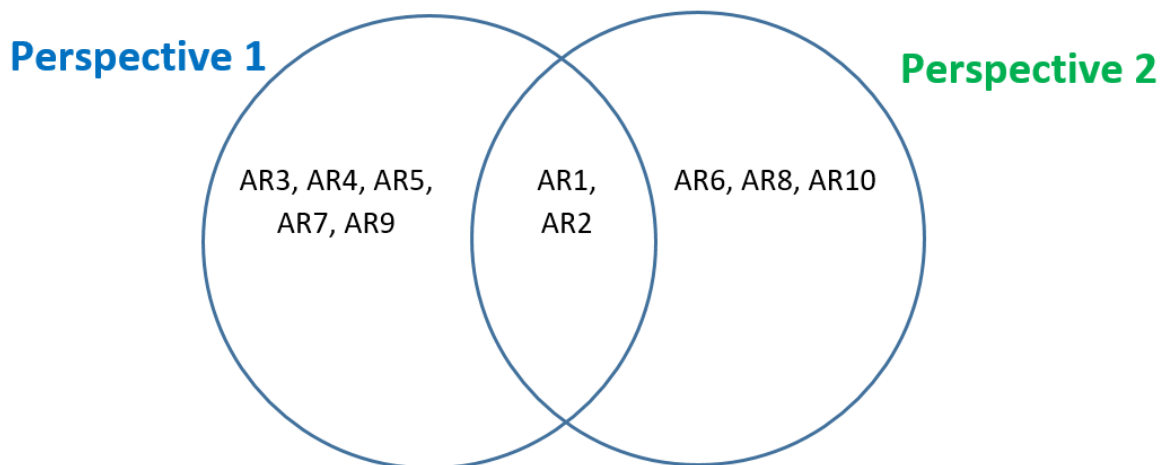
### Factor Matrix with an X Indicating a Defining Sort

QSORT		1	2
1	A Res1	0.5064	0.5471
2	A Res2	0.5779	0.6605
3	A Res3	0.8063X	0.3502
4	A Res4	0.5204X	0.4747
5	A Res5	0.6357X	0.1514
6	A Res6	0.1394	0.6213X
7	A Res7	0.5734X	0.2455
8	A Res8	0.4527	0.5566X
9	A Res9	0.6464X	0.2982
10	A Res10	0.2123	0.5971X
% expl.Var.		29	23
Eigenvalues		2.90	2.30

### Correlations Between Factor Scores

	1	2
1	1.0000	0.6048
2	0.6048	1.0000

### Distribution of Retirement Housing Site A Sorts across Two Perspectives



### RH Site A Perspective 1 – Secure But Not Social

The most important features for this perspective are feeling safe and secure (#17: +6) and being able to summon help in an emergency (#21: +6). They see value in the court manager (#1: +3), but don't consider it would be a problem if they were only available on

a part-time basis (#3: +2) and certainly would not want to be looked after (#10: -1) by a court manager living on site (#2: -5).

Independence is important (#28: +4) as is having the freedom not to join in or conform (#27: +5), especially as they don't appear to particularly like living with others of a similar age and outlook or as part of a compact community (#11: -2; #23: -4; #37: -4). They are nevertheless neighbourly and not lonely (#8: +2) despite not wanting to be involved in social events (#19: -2) or welcoming of people with pets (#13: -3).

They want to be warm and comfortable with an effective heating system (#16: +5), to know that the building is safe (#42: +3), repairs will be fixed quickly (#6: +4) and to have security of tenure (#14: +4).

### **RH Site A Perspective 2 – Supported But Not Small**

This perspective values the court manager (#1: +6) and the consistency of service they provide (#48: +6) above all other features. They do not need the court manager to live on-site (#2: -1), but they definitely would not be happy if they were only employed part-time (#3: -4). They want to be treated with dignity and respect (#31: +5), to maintain their freedom of control and choice (#27: +4) and ability to live independently (#28: +5).

Although people with this perspective do not think residence should only be restricted to those aged over 65 (#12: -3) and are less than enthusiastic about social events and activities (#19: 0), they do enjoy the community spirit and friendship that comes for living around people of a similar age and outlook (#23: +3) and are positive about pets (#13: +3).

They are not particularly interested in the communal facilities (#9: -1), or in the provision of a guest room (#50: -4), storage for buggies (#47: -3), a lift (#46: -2) or gardens (#18: -2). What does concern them is having their own front door (#24: +4) and ensuring that their own home is not too small (#38: -5).

## Retirement Housing Site A Factor Arrays

No.	Statement	1	2
1	A court manager to turn to if you need help and advice	3	6
2	A resident manager or warden who lives on-site	-5	-1
3	A court manager who is only employed on a part-time basis	2	-4
4	Close to shops, amenities and transport	1	-3
5	No need to worry about maintenance and repairs	3	2
6	Repairs or problems are addressed and fixed quickly	4	2
7	The appearance of the Court creates a good impression	0	-1
8	Companionship of neighbours so you are never lonely	2	-1
9	Use of a communal lounge and other shared facilities	0	-1
10	Peace of mind that comes from being looked after	-1	2
11	Living around people of a similar age and outlook	-2	1
12	Occupancy restricted to only retired people aged over 65	-3	-3
13	Residents are able to have dogs, cats or other pets	-3	3
14	Having security of tenure	4	2
15	A communal laundry room with washers and dryers	1	1
16	An effective and efficient heating and hot water system	5	1
17	Feeling safe and secure	6	4
18	A garden or balcony so you can sit out in private	0	-2
19	Social events and activities to get involved in	-2	0
20	Availability of a good internet connection and/or wifi	-2	-2
21	Pull-cord or pendant to summon help in an emergency	6	2
22	Sufficient car parking spaces	2	0
23	Community spirit and friendship with people of similar age and outlook	-4	3
24	You have your own home with your own front door	2	4
25	In a nice area with attractive surroundings	1	0
26	Being seen as form of care home	-6	-5
27	Freedom to live as you choose: no requirement to join in or conform	5	4
28	Independent living	4	5
29	Able to have your say and raise matters with senior management	1	1
30	Residents are engaged and able to exercise choice and control	-1	3
31	Residents are treated with dignity and respect	3	5
32	Some other residents behave badly	-5	-6
33	Residents who take control and assume responsibility for organising things	-3	-3
34	People don't respect privacy or confidentiality	-4	-6
35	Gossip spreads quickly	-6	-4
36	Residents with dementia or who need to be looked after	-1	0
37	Living in close proximity to others in a compact community	-4	1
38	Small flats	-2	-5
39	Properties and facilities that are modern and well-designed	-1	-1
40	Buildings and gardens are kept clean and tidy	1	-1
41	Contemporary kitchens and bathrooms	-3	-2
42	Checks on fire, electrical, gas, asbestos and water safety	3	3
43	Everyone is kept informed and up to date about local plans a	-2	0
44	Information about costs and charges is correct, clear and co	0	1
45	Wide doors, that are easy to open, for people with reduced m	0	0
46	A reliable lift	2	-2
47	A suitable storage area for buggies and other large items	-1	-3
48	Good staff who provide consistency of service	1	6
49	Common lounge used by external organisations and groups	-1	-2
50	Guest room available for visitors	0	-4

# Retirement Housing Site B

## Correlation Matrix Between Sorts

SORTS		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
1 NorRes1	100	52	38	47	44	45	53	42	17	59	42	46	47	47	42	54	24	42	
2 NorRes2	52	100	23	52	43	40	53	35	37	50	43	43	45	30	30	61	17	28	
3 NorRes3	38	23	100	27	31	42	42	42	33	48	22	14	54	41	36	41	16	42	
4 NorRes4	47	52	27	100	40	33	37	48	25	52	60	46	31	25	44	43	19	36	
5 NorRes5	44	43	31	40	100	58	53	42	20	57	47	30	31	23	33	56	33	29	
6 NorRes6	45	40	42	33	58	100	52	42	41	64	41	45	37	18	31	42	33	38	
7 NorRes7	53	53	42	37	53	52	100	54	24	59	47	47	63	48	36	49	22	41	
8 NorRes8	42	35	42	48	42	42	54	100	42	56	56	43	46	53	57	53	29	50	
9 NorRes9	17	37	33	25	20	41	24	42	100	46	45	47	23	33	48	22	25	23	
10 NorRes10	59	50	48	52	57	64	59	56	46	100	56	40	58	46	64	54	36	47	
11 NorRes11	42	43	22	60	47	41	47	56	45	56	100	66	40	48	48	46	41	29	
12 NorRes12	46	43	14	46	30	45	47	43	47	40	66	100	26	50	45	35	32	15	
13 NorRes13	47	45	54	31	31	37	63	46	23	58	40	26	100	39	38	65	23	48	
14 NorRes14	47	30	41	25	23	18	48	53	33	46	48	50	39	100	44	50	28	26	
15 NorRes15	42	30	36	44	33	31	36	57	48	64	48	45	38	44	100	37	12	36	
16 NorRes16	54	61	41	43	56	42	49	53	22	54	46	35	65	50	37	100	27	46	
17 NorRes17	24	17	16	19	33	33	22	29	25	36	41	32	23	28	12	27	100	14	
18 NorRes18	42	28	42	36	29	38	41	50	23	47	29	15	48	26	36	46	14	100	

Three factors were identified from the sorts of the 18 Retirement Housing resident participants at Site B.

Search for 7 Factors provides 56% explanation of variation, but significant loadings for only four out of seven Factors but one of these had just one defining sort.

Search for 5 Factors provides 54% explanation of variation, but significant loadings on four out of five Factors.

Search for 4 Factors provides 51% explanation of variation, but significant loadings on only three out of four Factors.

Search for 3 Factors provides 50% explanation of variation and significant loadings on all three Factors, even though three sorts did not load significantly on any of the Factors and one sort was confounded on more than one Factor at a 0.5 significance level. Selected as basis for analysis

<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>F6</b>	<b>F7</b>	<b>C</b>	<b>NS</b>
1, 2, 7, 13, 16	12	3, 15	-	5, 6	-	-	11 (2&7)	4, 8, 9, 10, 14, 17, 18
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>C</b>	<b>NS</b>		
1, 2, 7, 13, 16	11, 12	3, 8, 15	-	5, 6	-			4, 9 10, 14, 17, 18
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>C</b>	<b>NS</b>			
1, 2, 5, 6, 7, 16	9, 11, 12	3, 13, 15, 18	-	8	10			4, 14, 17
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>C</b>	<b>NS</b>				
1, 2, 5, 6, 7, 16	9, 11, 12	3, 10, 13, 15, 18	8					4, 14, 17

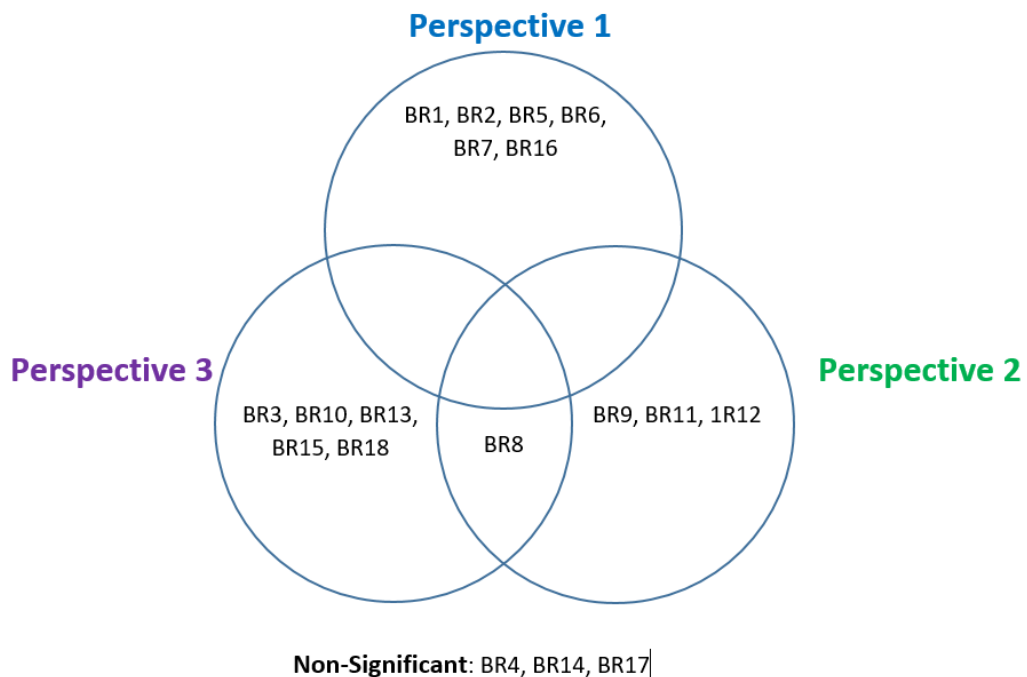
### Factor Matrix with an X Indicating a Defining Sort

QSORT	1	2	3
1 B Res1	0.5533X	0.2670	0.3575
2 B Res2	0.6067X	0.2946	0.1709
3 B Res3	0.1791	0.1089	0.6590X
4 B Res4	0.4442	0.3940	0.2212
5 B Res5	0.6776X	0.2212	0.1434
6 B Res6	0.5458X	0.2298	0.3345
7 B Res7	0.5534X	0.2305	0.4636
8 B Res8	0.2541	0.5219	0.5172
9 B Res9	0.0838	0.4996X	0.3116
10 B Res10	0.4931	0.4127	0.5476X
11 B Res11	0.3785	0.7793X	0.1119
12 B Res12	0.3614	0.7357X	-0.0137
13 B Res13	0.4684	0.0823	0.5792X
14 B Res14	0.2187	0.4601	0.3735
15 B Res15	0.0903	0.4848	0.5431X
16 B Res16	0.5563X	0.2198	0.4726
17 B Res17	0.2627	0.2825	0.1309
18 B Res18	0.2891	0.1228	0.5239X
% expl.Var.	18	16	16
Eigenvalues	3.24	2.88	2.88

### Correlations Between Factor Scores

	1	2	3
1	1.0000	0.6063	0.6535
2	0.6063	1.0000	0.4535
3	0.6535	0.4535	1.0000

### Distribution of Retirement Housing Site B Sorts across Three Perspectives



### **RH Site B Perspective 1 – Safety, Speed and Certainty**

For this perspective it is important to have a court manager on hand to help (#1: +5) and nothing would be worse that a court manager only available on a part-time basis (#3: -6).

The consistency of the court manager is also a key concern (#48: +5) as is being able to summons help in an emergency if the court manager is not around (#21: +6).

They are not particularly worried about maintenance and repairs (#5: +1) but they do want repairs to be done and problems addressed quickly (#6: +4). Having effective heating and hot water is a top priority (#16: +6) and they also want to know they are safe (#17: +4) that fire, electrical, gas, asbestos and water checks are carried out on (#42: +3).

This perspective is not particularly interested in social activities (#19: 0) and does not appreciate restrictions on occupation to only people aged over 65 (#12: -4) or living around people of a similar age and outlook (#11: -2).

### **RH Site B Perspective 2 – Age Exclusivity with No Worries**

This perspective wants peace of mind and to be looked after (#10: +4). Their top priorities are therefore having a court manager they can turn to (#1: +6) and ensuring that they don't have to worry about maintenance and repairs (#5: +6).

Being connected to the internet is of no interest or importance (#20: -5), but neither is car parking (#22: -3) despite also being unconcerned about proximity to shops and amenities (#4: -1).

They like the community spirit that comes from living around others of a similar age and outlook (#11: +2; #23: +2) and support occupancy being restricted to only retired people aged over 65 (#12: +4). Although they also want to be kept informed about local plans and activities (#43: +5), organised social events are not a top priority (#19: +1) they want the freedom to live as they chose and opt not to join in (#27: +5). Something they don't like though is allowing residents to have pets (#13: -5)

### **RH Site B Perspective 3 – Autonomy, Animals and Internet**

This perspective wants security and safety (#17: +6). But while they appreciate being treated with dignity and respect (#31: +5) and consistency of service from good staff (#48: +4), they are not so dependent upon the court manager for help and advice (#1: +3). They value the freedom to live independently as they choose (#27: +3; #28: +2) and definitely don't want to have a court manger living on-site (#2: -4).

It is important to have correct, clear and comprehensive information on costs and charges (#44: +4), but internet access is essential (#20: +5). Although they are not interested in social events and activities (#19: -2; #43: -1) they are neighbourly and not lonely (#8: +3).

It is also possible that they like their pets more than other people as the ability for residents to keep their dogs or cats is a top priority (#13: +6).



## Retirement Housing Site B Factor Arrays

No.	Statement	1	2	3
1	A court manager to turn to if you need help and advice	5	6	3
2	A resident manager or warden who lives on-site	1	2	-4
3	A court manager who is only employed on a part-time basis	-6	-2	-2
4	Close to shops, amenities and transport	2	-1	1
5	No need to worry about maintenance and repairs	1	6	2
6	Repairs or problems are addressed and fixed quickly	4	1	1
7	The appearance of the Court creates a good impression	0	0	-1
8	Companionship of neighbours so you are never lonely	1	2	3
9	Use of a communal lounge and other shared facilities	0	0	-1
10	Peace of mind that comes from being looked after	1	4	1
11	Living around people of a similar age and outlook	-2	2	0
12	Occupancy restricted to only retired people aged over 65	-4	4	-4
13	Residents are able to have dogs, cats or other pets	-3	-5	6
14	Having security of tenure	0	3	3
15	A communal laundry room with washers and dryers	-1	1	0
16	An effective and efficient heating and hot water system	6	3	4
17	Feeling safe and secure	4	1	6
18	A garden or balcony so you can sit out in private	-1	-3	2
19	Social events and activities to get involved in	0	1	-2
20	Availability of a good internet connection and/or wifi	-3	-5	5
21	Pull-cord or pendant to summon help in an emergency	6	3	1
22	Sufficient car parking spaces	-2	-3	2
23	Community spirit and friendship with people of similar age and outlook	-1	2	0
24	You have your own home with your own front door	3	3	2
25	In a nice area with attractive surroundings	3	-2	1
26	Being seen as form of care home	-4	-4	-6
27	Freedom to live as you choose: no requirement to join in or	-1	5	3
28	Independent living	-1	0	2
29	Able to have your say and raise matters with senior management	2	2	-1
30	Residents are engaged and able to exercise choice and control	-2	-1	0
31	Residents are treated with dignity and respect	4	4	5
32	Some other residents behave badly	-5	-6	-6
33	Residents who take control and assume responsibility for organising things	-2	-1	-3
34	People don't respect privacy or confidentiality	-5	-4	-5
35	Gossip spreads quickly	-6	-6	-5
36	Residents with dementia or who need to be looked after	0	1	-2
37	Living in close proximity to others in a compact community	-3	-2	-1
38	Small flats	-4	-3	-4
39	Properties and facilities that are modern and well-designed	3	-1	0
40	Buildings and gardens are kept clean and tidy	2	-2	0
41	Contemporary kitchens and bathrooms	-1	-2	-3
42	Checks on fire, electrical, gas, asbestos and water safety	3	1	1
43	Everyone is kept informed and up to date about local plans and activities	1	5	-1
44	Information about costs and charges is correct, clear and comprehensive	2	0	4
45	Wide doors, that are easy to open, for people with reduced mobility	1	0	-2
46	A reliable lift	-2	-3	-3
47	A suitable storage area for buggies and other large items	2	-4	-2
48	Good staff who provide consistency of service	5	0	4
49	Common lounge used by external organisations and groups	-3	-1	-3
50	Guest room available for visitors	0	-1	-1

# Retirement Housing Site C

## Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7	8	9
1 C res1	100	60	34	49	57	39	44	38	42
2 C res2	60	100	29	58	62	58	55	48	57
3 C res3	34	29	100	36	16	34	28	33	37
4 C res4	49	58	36	100	56	45	54	59	46
5 C res5	57	62	16	56	100	65	67	32	57
6 C res6	39	58	34	45	65	100	60	30	56
7 C res7	44	55	28	54	67	60	100	32	61
8 C res8	38	48	33	59	32	30	32	100	26
9 C res9	42	57	37	46	57	56	61	26	100

### Two factors identified from the sorts of the 9 Retirement Housing resident participants at Site C.

Search for 7 Factors provides 68% explanation of variation, but with significant loadings on only five out of seven Factors and four of these had just one defining sort.

Search for 5 Factors provides 62% explanation of variation, but with significant loadings on four out of five Factors and three of these had just one defining sort.

Search for 4 Factors provides 50% explanation of variation, but with significant loadings on three out of four Factors, but two of these had just one defining sort.

Search for 3 Factors provides 57% explanation of variation and significant loadings on all three Factors, but two of these had just one defining sort.

Search for 2 Factors provides 53% explanation of variation and significant loadings on both Factors with four defining sorts for one and three defining sorts for the other Factor. Although one sort did not load significantly on any of the Factors and one sort was confounded on more than one Factor at a 0.5 significance level this was selected as basis for analysis

<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>F6</b>	<b>F7</b>	<b>C</b>	<b>NS</b>
2, 5, 6, 7, 9	8	-	1	4	3	-	-	-
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>C</b>	<b>NS</b>		
2, 5, 6, 7, 9	8	-	3	4	-	1		
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>C</b>	<b>NS</b>			
2, 5, 6, 7, 9	8	4	-	-	1, 3			
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>C</b>	<b>NS</b>				
5, 6, 7, 9	8	4	2	1, 3				
<b>F1</b>	<b>F2</b>	<b>C</b>	<b>NS</b>					
5, 6, 7, 9	1, 4, 8	2	3					

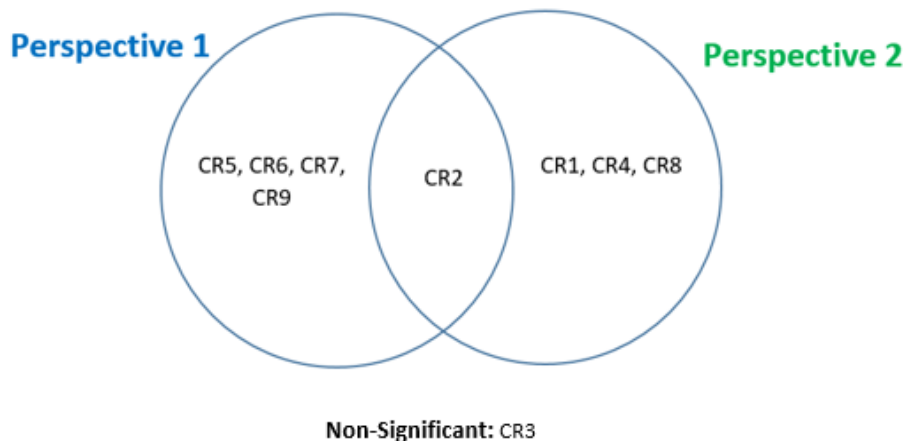
### Factor Matrix with an X Indicating a Defining Sort

QSORT		1	2
1	C res1	0.4283	0.5275X
2	C res2	0.6031	0.5362
3	C res3	0.2463	0.3799
4	C res4	0.4507	0.6360X
5	C res5	0.7587X	0.2869
6	C res6	0.7127X	0.2550
7	C res7	0.7588X	0.2474
8	C res8	0.1068	0.7117X
9	C res9	0.6647X	0.2990
% expl.Var.		32	21
Eigenvalues		2.88	1.89

### Correlations Between Factor Scores

	1	2
1	1.0000	0.5846
2	0.5846	1.0000

### Distribution of Retirement Housing Site C Sorts across Two Perspectives



### RH Site C Perspective 1 – Own Home Independence with Help on Hand

Having your own home and front door is essential for this perspective (#24: +6). Perhaps this is driven by their other top desire to be able to keep their dogs, cats or other pets (#13: +6) as well as a more general concern for independent living (#28: +5).

Having a court manager is clearly important for the help and advice they provide (#1: +5) as this perspective wants to be kept safe and secure (#17: +4) and be looked after (#10: +3). They do not want to have to worry about repairs or maintenance (#5: +4).

This perspective does not enjoy being part of a compact community (#37: -4) or living around and as part of a community with other people of a similar age and outlook (#11: -2; #23: -1). They are not in favour of having occupancy restricted to only people over retirement age (#12: -3) and do not want to get involved in social events (#19: -4).

## Site C Perspective 2 – Safe, Secure and Convenient

Having security of tenure is the top concern for this perspective (#14: +6) to ensure that they can remain safe and secure (#17: +5) living in their own home (#24: +5) in a convenient location close to shops, amenities and transport (#4: +6).

They do not want to be looked after (#10: -5), but do want to be treated with respect (#31: +3). Having a court manager to turn to is not a particular priority (#1: +2) and they definitely would not want to have a manager living on-site (#2: -5). They do not worry about repairs and maintenance (#5: -1), but they do want them to be done promptly (#6: +2) and it is important for the buildings and gardens to be kept clean and tidy (#40: +4).

It is surprising that this perspective does not give higher weighting to having freedom to live as they choose (#27: +1) or independent living (#28: +1), but perhaps they have just not conceived that these rights might be in jeopardy.

Although they do not mind living in a compact community (#37: +2) they do not appear to place any particular value on the companionship of neighbours (#8: +1) or being part of a community with people of a similar age and outlook (#11: 0; 23: 0). They are not interested in social activities (#19: -2) or in being able to keep pets (#13: -1).

## Retirement Housing Site C Factor Arrays

No.	Statement	1	2
1	A court manager to turn to if you need help and advice	5	2
2	A resident manager or warden who lives on-site	-3	-5
3	A court manager who is only employed on a part-time basis	-4	-3
4	Close to shops, amenities and transport	-1	6
5	No need to worry about maintenance and repairs	4	-1
6	Repairs or problems are addressed and fixed quickly	1	2
7	The appearance of the Court creates a good impression	0	1
8	Companionship of neighbours so you are never lonely	-1	1
9	Use of a communal lounge and other shared facilities	1	2
10	Peace of mind that comes from being looked after	3	-5
11	Living around people of a similar age and outlook	-2	0
12	Occupancy restricted to only retired people aged over 65	-3	-2
13	Residents are able to have dogs, cats or other pets	6	-1
14	Having security of tenure	2	6
15	A communal laundry room with washers and dryers	3	2
16	An effective and efficient heating and hot water system	4	3
17	Feeling safe and secure	4	5
18	A garden or balcony so you can sit out in private	2	0
19	Social events and activities to get involved in	-4	-2
20	Availability of a good internet connection and/or wifi	0	3
21	Pull-cord or pendant to summon help in an emergency	2	0
22	Sufficient car parking spaces	0	-1
23	Community spirit and friendship with people of similar age and outlook	-1	0
24	You have your own home with your own front door	6	5
25	In a nice area with attractive surroundings	-1	-2
26	Being seen as form of care home	-5	-6
27	Freedom to live as you choose: no requirement to join in or conform	3	1
28	Independent living	5	1
29	Able to have your say and raise matters with senior management	2	1
30	Residents are engaged and able to exercise choice and control	1	3
31	Residents are treated with dignity and respect	1	3
32	Some other residents behave badly	-6	-4
33	Residents who take control and assume responsibility for organising things	-4	-3
34	People don't respect privacy or confidentiality	-5	-6
35	Gossip spreads quickly	-6	-3
36	Residents with dementia or who need to be looked after	-1	-2
37	Living in close proximity to others in a compact community	-4	2
38	Small flats	-3	-4
39	Properties and facilities that are modern and well-designed	1	0
40	Buildings and gardens are kept clean and tidy	2	4
41	Contemporary kitchens and bathrooms	-2	-1
42	Checks on fire, electrical, gas, asbestos and water safety	1	4
43	Everyone is kept informed and up to date about local plans and activities	-2	1
44	Information about costs and charges is correct, clear and comprehensive	-2	4
45	Wide doors, that are easy to open, for people with reduced mobility	0	0
46	A reliable lift	-1	-4
47	A suitable storage area for buggies and other large items	0	-1
48	Good staff who provide consistency of service	0	-1
49	Common lounge used by external organisations and groups	-2	-3
50	Guest room available for visitors	3	-2

# Retirement Housing Site D

## Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
1 D Res1	100	72	51	28	51	59	34	30	41	52	20	51	36	53	52	68
2 D Res2	72	100	69	34	53	60	44	40	58	54	29	61	35	66	55	58
3 D Res3	51	69	100	47	60	55	34	54	75	51	20	67	52	66	56	46
4 D Res4	28	34	47	100	35	39	34	54	53	46	22	55	43	48	31	37
5 D Res5	51	53	60	35	100	47	29	38	46	36	18	45	38	53	40	41
6 D Res6	59	60	55	39	47	100	27	36	55	50	35	56	34	46	27	59
7 D Res7	34	44	34	34	29	27	100	27	41	44	29	44	43	41	36	43
8 D Res8	30	40	54	54	38	36	27	100	56	28	18	59	47	45	27	31
9 D Res9	41	58	75	53	46	55	41	56	100	48	41	67	41	61	42	50
10 D Res10	52	54	51	46	36	50	44	28	48	100	34	66	34	64	51	60
11 D Res11	20	29	20	22	18	35	29	18	41	34	100	21	9	40	20	23
12 D Res12	51	61	67	55	45	56	44	59	67	66	21	100	45	63	42	47
13 D Res13	36	35	52	43	38	34	43	47	41	34	9	45	100	24	30	38
14 D Res14	53	66	66	48	53	46	41	45	61	64	40	63	24	100	49	54
15 D Res15	52	55	56	31	40	27	36	27	42	51	20	42	30	49	100	46
16 D Res16	68	58	46	37	41	59	43	31	50	60	23	47	38	54	46	100

Three factors were identified from the sorts of the 16 Retirement Housing resident participants at Site D.

Search for 7 Factors provides 60% explanation of variation, but significant loadings on only five out of seven Factors and two of these had just one defining sort.

Search for 5 Factors provides 56% explanation of variation, but significant loadings on just four out of five Factors and one of these had just one defining sort.

Search for 4 Factors provides 57% explanation of variation and significant loadings on all four Factors, but one of these only had one defining sort.

Search for 3 Factors provides 54% explanation of variation and at least two significant loadings on all three Factors even though three sorts did not load significantly on any of the Factors and one sort was confounded on more than one Factor at a 0.5 significance level. Selected as basis for analysis

<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>F6</b>	<b>F7</b>	<b>C</b>	<b>NS</b>
1, 6, 16	4, 8, 9, 12, 13	3	11	-	10, 15	-	2	5, 7, 14
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>C</b>	<b>NS</b>		
2, 5	4, 8, 9, 12, 13	1, 10, 16	11	-	3	6, 7, 14, 15		
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>C</b>	<b>NS</b>			
3, 5	4, 8, 9, 12, 13	1, 10, 16	11	2	6, 7, 14, 15			
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>C</b>	<b>NS</b>				
1, 2, 5, 14, 15	4, 8, 9, 12, 13	10, 16	3	6, 7, 11				

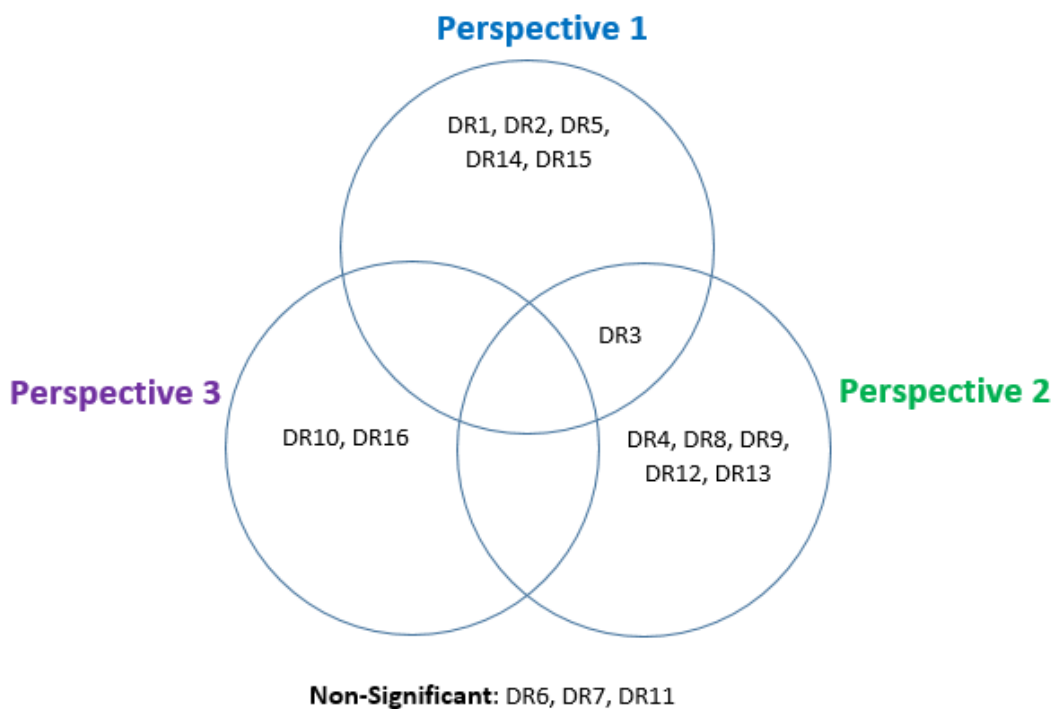
### Factor Matrix with an X Indicating a Defining Sort

QSORT	1	2	3
1 D Res1	0.5975X	0.1295	0.4817
2 D Res2	0.7116X	0.2513	0.4075
3 D Res3	0.6575	0.5870	0.1307
4 D Res4	0.1236	0.6078X	0.3253
5 D Res5	0.5623X	0.3202	0.1810
6 D Res6	0.4045	0.3869	0.3985
7 D Res7	0.2151	0.3270	0.4159
8 D Res8	0.2040	0.7314X	0.0655
9 D Res9	0.3777	0.6133X	0.3694
10 D Res10	0.3700	0.2752	0.6293X
11 D Res11	0.1081	0.1205	0.4326
12 D Res12	0.3916	0.5970X	0.3980
13 D Res13	0.2052	0.5447X	0.1895
14 D Res14	0.5431X	0.3799	0.4277
15 D Res15	0.5508X	0.2102	0.2604
16 D Res16	0.4243	0.1831	0.6317X
% expl.Var.	20	19	15
Eigenvalues	3.20	3.04	2.40

### Correlations Between Factor Scores

	1	2	3
1	1.0000	0.6436	0.7321
2	0.6436	1.0000	0.5812
3	0.7321	0.5812	1.0000

### Distribution of Retirement Housing Site D Sorts across Three Perspectives



### RH Site D Perspective 1 – Support and Suitability

This perspective wants the support of a court manager (#1: +6) and to be able to summons help in an emergency (#21: +6) but does not think Retirement Housing is suitable for people living with dementia or who need to be looked after (#36: -6). They appreciate good staff who provide consistency of service and support (#48: +5) but do not want to be looked after (#10: -2). They want to be able to have their say with senior managers (#29: +4), but do not want to be involved in exercising choice and control (#30: -1) and particularly dislike it when other residents assume control and responsibility for organising things (#33: -3).

A reliable lift (#46: +4) and wide doors that are easy to open (#45: +2) are welcome features that help with mobility. But having sufficient car parking (#22: +3) is seen as more important than being close to shops, amenities or transport (#4: +1). Living in a compact community with people of a similar age and outlook is not welcomed (#11: -1; 23: -1; 37: -2) and this perspective does not consider it positive to restrict occupation only to those aged over 65 (#12: -2).

### RH Site D Perspective 2 – Home and Community

Having one's own home and front door is essential for people with this perspective (#24: +6) as it allows them to live independently (#28: +5) and maintain freedom to choice (#27: +5). They are though not concerned about having security of tenure (#14: -2). They want to feel safe and secure (#17: +5) and have peace of mind from being looked after (#10: +4). They don't see the court manager as being central to this (#1: +2) and certainly wouldn't want a court manager who lived on-site (#2: -4). What they value more is being part of a community of people of a similar age and outlook (#11: +2; #23: +3). They are positive about occupancy being limited to retired people aged over 65 (#12: +4) and companionship that neighbours provide (#8: +3).

Although they like being part of a community they are not so keen on living in close proximity to others (#37: -2) or the limitations of a small flat (#38: -6). They don't seem to worry about repairs being done quickly (#6: -2), but they are concerned that the appearance of where they live creates a good impression (#7: +3).

### RH Site D Perspective 3 – Safety and Respect but Independent

This perspective wants a court manager (#1: +6) who offers good and consistent service (#48: +4) and treats them with dignity and respect (#31: +5). This helps them to live independently (#28: +4) with their own home and front door (#25: +5), but still allows them to be able to exercise choice and control (#30: +3).

They are not particularly concerned about needing to feel safe and secure (#17: +2), of being looked after (#10: +2) or having security of tenure (#14: +1), but they really do want to ensure that checks have been carried out on fire, electrical, gas, asbestos and water safety (#42: +6).



**They are not lonely or lacking in contact from neighbours (#8: +2; #37: +1), but do not want to get involved in social events and activities (#19: -2). They are not seeking community spirit of friendship from other people of the same age and outlook (#11: -1; #23: -2) and do not want occupancy to necessarily be restricted to people aged over 65 (#12: -1).**

## Retirement Housing Site D Factor Arrays

No.	Statement	1	2	3
1	A court manager to turn to if you need help and advice	6	2	6
2	A resident manager or warden who lives on-site	-3	-4	0
3	A court manager who is only employed on a part-time basis	-4	-3	-6
4	Close to shops, amenities and transport	1	0	0
5	No need to worry about maintenance and repairs	2	0	3
6	Repairs or problems are addressed and fixed quickly	2	-2	3
7	The appearance of the Court creates a good impression	0	3	0
8	Companionship of neighbours so you are never lonely	0	3	2
9	Use of a communal lounge and other shared facilities	3	2	0
10	Peace of mind that comes from being looked after	-2	4	2
11	Living around people of a similar age and outlook	-1	2	-2
12	Occupancy restricted to only retired people aged over 65	-2	4	-1
13	Residents are able to have dogs or other pets	-4	-3	-3
14	Having security of tenure	1	-2	1
15	A communal laundry room with washers and dryers	2	2	-2
16	An effective and efficient heating and hot water system	3	3	4
17	Feeling safe and secure	5	6	2
18	A garden or balcony so you can sit out in private	0	1	-4
19	Social events and activities to get involved in	0	1	-2
20	Availability of a good internet connection and/or wifi	-2	-2	-3
21	Pull-cord or pendant to summon help in an emergency	6	4	1
22	Sufficient car parking spaces	3	-3	-3
23	Community spirit and friendship with people of similar age and outlook	-1	3	-2
24	You have your own home with your own front door	4	6	4
25	In a nice area with attractive surroundings	1	1	2
26	Being seen as form of care home	-6	-5	-4
27	Freedom to live as you choose: no requirement to join in or conform	1	5	1
28	Independent living	3	5	4
29	Able to have your say and raise matters with senior management	4	-1	0
30	Residents are engaged and able to exercise choice and control	-1	-1	3
31	Residents are treated with dignity and respect	2	2	5
32	Some other residents behave badly	-5	-5	-5
33	Residents who take control and assume responsibility for organising things	-3	-2	-2
34	People don't respect privacy or confidentiality	-4	-4	-5
35	Gossip spreads quickly	-5	-6	-4
36	Residents with dementia or who need to be looked after	-6	-1	-1
37	Living in close proximity to others in a compact community	-2	-2	1
38	Small flats	-3	-6	-3
39	Properties and facilities that are modern and well-designed	-1	1	0
40	Buildings and gardens are kept clean and tidy	1	0	3
41	Contemporary kitchens and bathrooms	-1	-1	1
42	Checks on fire, electrical, gas, asbestos and water safety	0	0	6
43	Everyone is kept informed and up to date about local plans and activities	0	0	-1
44	Information about costs and charges is correct, clear and comprehensive	1	-1	1
45	Wide doors, that are easy to open, for people with reduced mobility	2	-4	-2
46	A reliable lift	4	1	2
47	A suitable storage area for buggies and other large items	-2	-3	-1
48	Good staff who provide consistency of service	5	1	4
49	Common lounge used by external organisations and groups	-3	-1	-6
50	Guest room available for visitors	-1	0	-2

# Retirement Housing Site E

## Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7	8	9
1 E Res1	100	54	50	46	44	50	38	51	25
2 E Res2	54	100	58	92	44	58	44	43	30
3 E Res3	50	58	100	48	33	100	39	31	29
4 E Res4	46	92	48	100	34	48	31	43	18
5 E Res5	44	44	33	34	100	33	39	53	54
6 E Res6	50	58	100	48	33	100	39	31	29
7 E Res7	38	44	39	31	39	39	100	34	24
8 E Res8	51	43	31	43	53	31	34	100	33
9 E Res9	25	30	29	18	54	29	24	33	100

**Two factors identified from the sorts of the 9 Retirement Housing resident participants at Site E.**

Search for 7 Factors provides 69% explanation of variation but significant loadings on just four out of seven Factors.

Search for 4 Factors provides 62% explanation of variation and significant loadings on three out of four Factors.

Search for 3 Factors provides 54% explanation of variation, but significant loadings on only two out of three Factors.

Search for 2 Factors provides 54% explanation of variation and significant loadings on both Factors and at least two significant loadings on each Factor even though three sorts did not load significantly on any of the Factors at a 0.5 significance level. This was selected as basis for analysis.

<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>F6</b>	<b>F7</b>	<b>C</b>	<b>NS</b>
3,6	5,9	-	2,4	-	1,8	-	-	7
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>C</b>	<b>NS</b>			
3,6	5,8	-	2,4	-	1,7,9			
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>C</b>	<b>NS</b>				
2,3,4,6	5,8	-	-	-	1,7,9			
<b>F1</b>	<b>F2</b>	<b>C</b>	<b>NS</b>					
2,3,4,6	5,8	-	1,7,9					

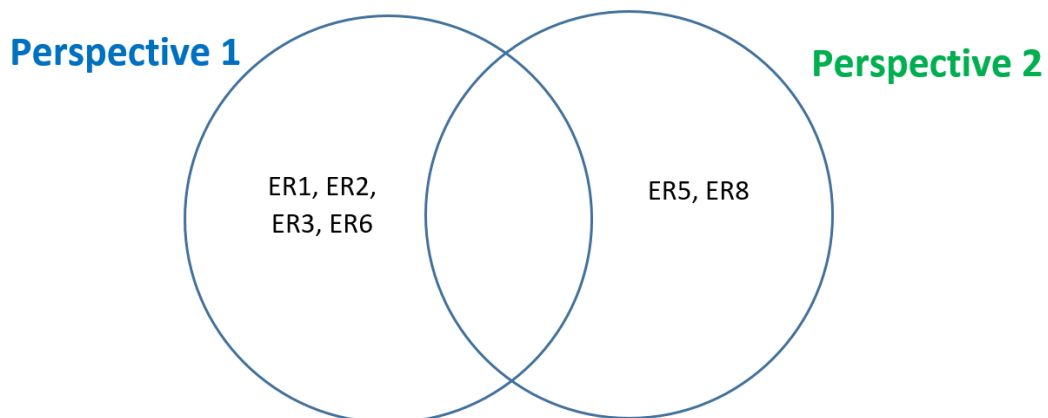
### Factor Matrix with an X Indicating a Defining Sort

QSORT		1	2
1 E Res1		0.4855	0.4880
2 E Res2		0.7911X	0.3582
3 E Res3		0.7979X	0.2206
4 E Res4		0.6939X	0.2496
5 E Res5		0.1670	0.7839X
6 E Res6		0.7979X	0.2206
7 E Res7		0.3580	0.4073
8 E Res8		0.2460	0.6325X
9 E Res9		0.1649	0.4893
% expl.Var.		32	22
Eigenvalues		2.88	1.98

### Correlations Between Factor Scores

	1	2
1	1.0000	0.4657
2	0.4657	1.0000

### Distribution of Retirement Housing Site E Sorts across Two Perspectives



**Non-Significant:** ER1, ER7, ER9

### Site E Perspective 1 – Warm and Respected with On-Site Manager

This perspective sees the court manager as essential (#1: +6) and equally vital that they are resident on-site (#2: +6) and not part-time (#3: -6). They are not motivated by independent living (#28: +1) but do want the freedom to live as they choose (#27: +4) and ability to have their say and raise matters with senior managers (#29: +3). Being treated with dignity and respect (#31: +5) is more important than being looked after (#10: +3) or feeling safe and secure (#17: +3). The security of their tenure is not a concern (#14: 0) nor do they appear to be worried about maintenance and repairs (#5: 0; #6: +1).

Having your own home and front door is a priority (#24: +4) but they do not want it to be too small (#38: -5). A particular emphasis is placed on wanting the warmth of an efficient and effective heating and hot water system (#16: +5) and this may have been as a consequence of consultation that was on-going about replacing electric storage heaters with individual gas heating.

They like having a communal laundry (#15: +4) but are less concerned about using the communal lounge (#9: 0). They do not like living in close community with other people of a similar age and outlook (#11: -1; #23: -1; #37: -1) so do not see a benefit in restricting occupancy to only retired people aged over 65 (#12: -2). They do, however, see some small advantages in the companionship of neighbours (#8: +1) and social events (#19: +1). They are particularly opposed to residents to have dogs, cats or other pets (#13: -5) and not interested in access to the internet (#20: -4).

### Site E Perspective 2 – Age, Security and Independence

This perspective considers it a priority for residence to be limited to retired people aged over 65 (#12: +6). Although they want to live around people of a similar age and outlook (#11: +2), they do not necessarily want to form a community with them (#23: -2) and living in compact community is seen as a disadvantage (#37: -3).

They want to be able live independently (#28: +6), but do not necessarily want to exercise choice and control (#30: -1), to be able to have their say with senior management (#29: -1). Their desire for the peace of mind that comes from being looked after (#10: +4) is stronger than having the freedom to live as they choose (#27: 0). It is seen as positive that people living with dementia or needing care can live independently in retirement housing (#36: +3).

This perspective does not worry about repairs and maintenance (#5: -1) but wants problems fixed quickly (#6: +5). They appreciate the availability of a court manager for help and advice (#1: +4) and have a slight preference to have a manager who lives on site (#2: +2) and not to be part-time (#3: -2). Security of tenure is important (#14: +5), but they do not feel a need to prioritise safety or security (#17: 0) or other safety checks (#42: 0).

People with this perspective are more interested in having their own home and front door (#24: +3) to a reasonable sized property (#38: -4) than having a shared lounge and other communal facilities (#9: -4). They are not interested in social events and activities (#19: -3).

There is a desire to live in a nice area with attractive surroundings (#25: +4) and for the appearance of the Court to give a good impression (#7: +3) and to be close to shops, amenities and transport (#4: +2).

## Retirement Housing Site E Factor Arrays

No.	Statement	1	2
1	A court manager to turn to if you need help and advice	6	4
2	A resident manager or warden who lives on-site	6	2
3	A court manager who is only employed on a part-time basis	-6	-2
4	Close to shops, amenities and transport	0	2
5	No need to worry about maintenance and repairs	0	-1
6	Repairs or problems are addressed and fixed quickly	1	5
7	The appearance of the Court creates a good impression	-1	3
8	Companionship of neighbours so you are never lonely	1	0
9	Use of a communal lounge and other shared facilities	0	-4
10	Peace of mind that comes from being looked after	3	4
11	Living around people of a similar age and outlook	-1	2
12	Occupancy restricted to only retired people aged over 65	-2	6
13	Residents are able to have dogs, cats or other pets	-5	-3
14	Having security of tenure	0	5
15	A communal laundry room with washers and dryers	4	-1
16	An effective and efficient heating and hot water system	5	2
17	Feeling safe and secure	3	0
18	A garden or balcony so you can sit out in private	-3	-1
19	Social events and activities to get involved in	1	-3
20	Availability of a good internet connection and/or wifi	-4	0
21	Pull-cord or pendant to summon help in an emergency	2	1
22	Sufficient car parking spaces	-2	1
23	Community spirit and friendship with people of similar age and outlook	-1	-2
24	You have your own home with your own front door	4	3
25	In a nice area with attractive surroundings	0	4
26	Being seen as form of care home	-4	-4
27	Freedom to live as you choose: no requirement to join in or conform	4	0
28	Independent living	1	6
29	Able to have your say and raise matters with senior management	3	-1
30	Residents are engaged and able to exercise choice and control	2	-1
31	Residents are treated with dignity and respect	5	-2
32	Some other residents behave badly	-1	-5
33	Residents who take control and assume responsibility for organising things	1	-1
34	People don't respect privacy or confidentiality	-6	-6
35	Gossip spreads quickly	-4	-6
36	Residents with dementia or who need to be looked after	-1	3
37	Living in close proximity to others in a compact community	-1	-3
38	Small flats	-5	-4
39	Properties and facilities that are modern and well-designed	-2	-3
40	Buildings and gardens are kept clean and tidy	1	1
41	Contemporary kitchens and bathrooms	0	3
42	Checks on fire, electrical, gas, asbestos and water safety	3	0
43	Everyone is kept informed and up to date about local plans and activities	-2	1
44	Information about costs and charges is correct, clear and comprehensive	2	1
45	Wide doors, that are easy to open, for people with reduced mobility	-2	1
46	A reliable lift	2	-2
47	A suitable storage area for buggies and other large items	-3	-2
48	Good staff who provide consistency of service	-3	-1
49	Common lounge used by external organisations and groups	-3	-5
50	Guest room available for visitors	2	2

# Retirement Housing Site F

## Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21
1 F Res1	100	39	41	39	37	26	14	14	41	30	38	11	15	37	34	24	39	42	33	23	34
2 F Res2	39	100	42	47	45	30	49	48	53	53	44	9	30	37	52	48	36	52	43	18	49
3 F Res3	41	42	100	55	54	36	29	42	48	34	56	19	43	39	60	37	29	37	35	19	41
4 F Res4	39	47	55	100	26	43	23	66	71	37	68	38	46	53	66	55	22	45	45	42	68
5 F Res5	37	45	54	26	100	42	34	49	33	36	39	12	30	40	40	21	28	32	30	10	24
6 F Res6	26	30	36	43	42	100	46	55	48	54	27	25	12	55	51	49	16	44	48	35	41
7 F Res7	14	49	29	23	34	46	100	36	32	43	18	30	17	34	42	32	39	31	47	19	34
8 F Res8	14	48	42	66	49	55	36	100	56	30	54	39	41	36	56	48	15	32	40	37	53
9 F Res9	41	53	48	71	33	48	32	56	100	45	43	31	38	48	68	54	29	58	46	41	64
10 F Res10	30	53	34	37	36	54	43	30	45	100	27	17	13	54	44	38	24	42	43	21	24
11 F Res11	38	44	56	68	39	27	18	54	43	27	100	21	38	31	50	35	11	31	30	14	53
12 F Res12	11	9	19	38	12	25	30	39	31	17	21	100	33	36	31	33	31	47	44	31	42
13 F Res13	15	30	43	46	30	12	17	41	38	13	38	33	100	15	51	42	-3	24	25	23	44
14 F Res14	37	37	39	53	40	55	34	36	48	54	31	36	15	100	46	45	33	47	47	28	39
15 F Res15	34	52	60	66	40	51	42	56	68	44	50	31	51	46	100	70	29	44	42	24	59
16 F Res16	24	48	37	55	21	49	32	48	54	38	35	33	42	45	70	100	1	41	37	28	45
17 F Res17	39	36	29	22	28	16	39	15	29	24	11	31	-3	33	29	1	100	45	20	12	41
18 F Res18	42	52	37	45	32	44	31	32	58	42	31	47	24	47	44	41	45	100	58	28	44
19 F Res19	33	43	35	45	30	48	47	40	46	43	30	44	25	47	42	37	20	58	100	32	45
20 F Res20	23	18	19	42	10	35	19	37	41	21	14	31	23	28	24	28	12	28	32	100	38
21 F Res21	34	49	41	68	24	41	34	53	64	24	53	42	44	39	59	45	41	44	45	38	100

**Three factors identified from the sorts of the 21 Retirement Housing resident participants at Site F.**

Search for 7 Factors provides 56% explanation of variation with significant loadings on five out of seven Factors and one of these had just one defining sort.

Search for 5 Factors provides 53% explanation of variation with significant loadings on four out of five Factors.

Search for 4 Factors provides 49% explanation of variation and significant loadings on three out of four Factors.

Search for 3 Factors provides 49% explanation of variation and significant loadings on all three Factors. Although six sorts did not load significantly on any of the Factors at a 0.5 significance level this was still selected as basis for analysis

<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>F6</b>	<b>F7</b>	<b>C</b>	<b>NS</b>
7	6, 14	3, 5	-	17, 18	4, 8, 9, 11, 13, 15, 16, 21	-	-	1, 2, 10, 12, 19, 20
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>C</b>	<b>NS</b>		
3, 8, 11, 13, 15, 21	2, 5, 6, 7, 10	1, 17, 18	-	12, 20	4 (1&5)	9, 14, 16, 19		
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>C</b>	<b>NS</b>			
6, 14, 19	1, 2, 3, 5, 10, 17	4, 8, 9, 11, 13, 15, 21	-			7, 12, 16, 18, 20		
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>C</b>	<b>NS</b>				
6, 14, 19	1, 2, 3, 5, 17	4, 8, 9, 11, 13, 15, 21			7, 10, 12, 16, 18, 20			

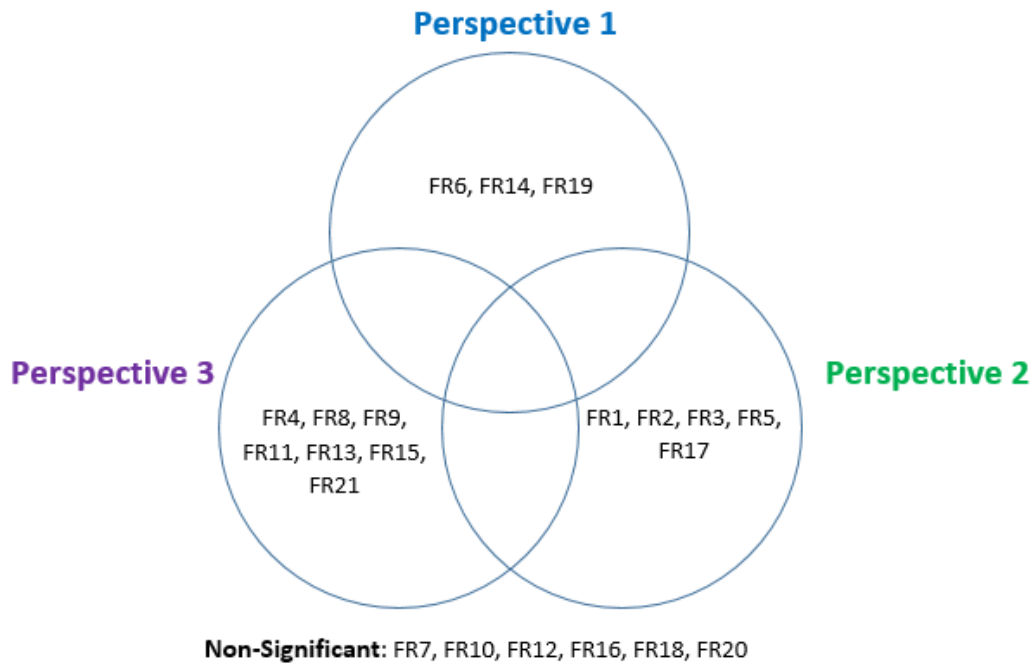
**Factor Matrix with an X Indicating a Defining Sort**

QSORT	1	2	3
1 F Res1	0.0976	0.5257X	0.2378
2 F Res2	0.2848	0.5798X	0.3077
3 F Res3	0.0652	0.5751X	0.4894
4 F Res4	0.4116	0.1842	0.7653X
5 F Res5	0.1146	0.5794X	0.2420
6 F Res6	0.6829X	0.2404	0.1875
7 F Res7	0.3600	0.4686	0.0885
8 F Res8	0.4031	0.2133	0.5828X
9 F Res9	0.4599	0.3584	0.5357
10 F Res10	0.4880	0.4961	0.0207
11 F Res11	0.0916	0.3386	0.5965X
12 F Res12	0.4665	0.0922	0.2480
13 F Res13	0.0982	0.0377	0.6635X
14 F Res14	0.5532X	0.4114	0.1780
15 F Res15	0.3803	0.3670	0.6232X
16 F Res16	0.4669	0.1666	0.4742
17 F Res17	0.1552	0.5094X	0.0354
18 F Res18	0.4645	0.4895	0.2227
19 F Res19	0.5892X	0.3340	0.2003
20 F Res20	0.4563	0.0291	0.2382
21 F Res21	0.3539	0.2869	0.6127X
% expl.Var.	16	15	18
Eigenvalues	3.36	3.15	3.78

## Correlations Between Factor Scores

	1	2	3
1	1.0000	0.5618	0.5847
2	0.5618	1.0000	0.6337
3	0.5847	0.6337	1.0000

## Distribution of Retirement Housing Site F Sorts across Three Perspectives



### RH Site F Perspective 1 – Age, Independence and Parking

Car parking is the top priority for this perspective (#22: +6) which may be a symptom of the parking pressures and problems being experienced at the Site and some residents confirmed that their primary motivation for participating in the research was to express their frustration and request the provision of additional parking places. It was surprising therefore that this perspective did not prioritise the ability to have their say and raise matters with senior management (#29: -2).

Independent living is very important (#28: +5) to this perspective and they want to be treated with dignity and respect (#31: +4). Although they would not want a part-time court manager (#3: -4) they do not appear consider the availability of help of a court manager to be of primary importance (#1: +1) or have a strong preference about whether the court manager should live on-site or not (#2: 0). They do though think that being able to summon help in an emergency is a positive feature (#21: +3).

They want to feel safe and secure (#17: +4) in their own home (#24: +5) with security of tenure (#14: +3). They also have a preference for living in a nice area with attractive surroundings (#25: +3) with access to gardens (#18: +3).



This perspective considers it vital that occupancy is restricted to retired people aged over 65 (#12: +6), but do not appear to want to live in close proximity to people of a similar age and outlook (#37: -4; #11: -1). They do though see some benefit in having the companionship of neighbours (#8: +1) and community friendships with people of a similar age (#23: +2). They do not, however, approve of residents having pets (#13: -5).

### RH Site F Perspective 2 – Modern Maintained Property

This perspective is all about the property. They do not want to be looked after (#10: -3) and are not interested in social activities (#19: -3) or being part of a community of people of similar age or outlook (#11: -1; #12: -2; #23: +1; #37: -3). A court manager is not seen as an advantage (#1: -1) and they would rather have someone employed part-time (#3: -1) than a court manager who lived on-site (#2: -4).

Having their own home is this perspective's top priority (#24: +6). They want to know their home will be maintained and repaired (#5: +6), any problems addressed quickly (#6: +4) and the buildings and gardens kept clean and tidy (#40: +1). They want their homes to be modern and well-designed (#39: +5), with contemporary kitchens and bathrooms (#41: +3) as well as an effective and efficient heating system (#16: +3). They definitely do not want small properties (#38: -6). Sufficient spaces for car parking is desirable (#22: +2), but gardens are not so important (#18: -1). A communal laundry (#15: +3) is seen as being more important than a communal lounge (#9: +1).

Security of tenure is important (#14: +4) as this helps ensure that they feel safe and secure (#17: +3) as do checks on the safety of fire, electrical, gas, asbestos and water (#42: +2). It is of moderate concern that they will be treated with dignity and respect (#31: +2), but more important that they have information about costs and charges (#44: +4) as well as being informed about local plans and activities (#43: +2). They want to be able to have their say and access senior management (#29: +2), but do not particularly want to exercise choice and control (#30: +1).

Independent living (#28: 0) and freedom to live as you choose (#27: 0) are not identified as priorities, perhaps because they are taken for granted. This perspective sees it as an advantage that the properties may be suitable for residents living with dementia or needing care (#36: +5).

### RH Site F Perspective 3 – Safe, Protected and Private

This perspective not only wants a court manager to provide help and advice (#1: +5) they want them to live on-site (#2: +6). They definitely do not want the court manager only to be part-time (#3: -5). Independent living is not their priority (#28: 0). They want to be looked after (#10: +3) and warm (#16: +5) so they feel safe and secure (#17: +4) whilst living in their own home with their own front door (#24: +6). They also want to know that fire, electrical, gas, asbestos and water safety checks have been made (#42: +4) and they do not need to worry about maintenance and repairs (#5: +4).

**They do not enjoy or appear to get a sense of community (#23: -1) from living around other people of a similar age and outlook (#11: -2) and don't see benefits in occupation only being for retired people aged over 65 (#12: -1). They do not want to get involved in social events (#19: -2) nor do they feel they need the companionship of neighbours (#8: -1). Living in close proximity to others to be problematic (#37: -4), especially when they do not respect your right to privacy (#34: -6).**

**Although a communal lounge is not considered important (#9: -1), they do see some benefit in having a communal laundry (#15: +2). However the use of the lounge by external organisations or groups is considered to be particularly unwelcome (#49: -5).**

### Retirement Housing Site F Factor Arrays

No.	Statement	1	2	3
1	A court manager to turn to if you need help and advice	1	-1	5
2	A resident manager or warden who lives on-site	0	-4	6
3	A court manager who is only employed on a part-time basis	-4	-1	-5
4	Close to shops, amenities and transport	1	0	1
5	No need to worry about maintenance and repairs	2	6	4
6	Repairs or problems are addressed and fixed quickly	0	4	3
7	The appearance of the Court creates a good impression	0	-1	1
8	Companionship of neighbours so you are never lonely	1	-2	-1
9	Use of a communal lounge and other shared facilities	1	1	-1
10	Peace of mind that comes from being looked after	0	-3	3
11	Living around people of a similar age and outlook	-1	-1	-2
12	Occupancy restricted to only retired people aged over 65	6	-2	-1
13	Residents are able to have dogs, cats or other pets	-5	-4	-3
14	Having security of tenure	3	4	2
15	A communal laundry room with washers and dryers	2	3	2
16	An effective and efficient heating and hot water system	4	3	5
17	Feeling safe and secure	4	3	4
18	A garden or balcony so you can sit out in private	3	-1	0
19	Social events and activities to get involved in	-2	-3	-2
20	Availability of a good internet connection and/or wifi	2	1	-2
21	Pull-cord or pendant to summon help in an emergency	3	1	1
22	Sufficient car parking spaces	6	2	-2
23	Community spirit and friendship with people of similar age and outlook	2	1	-1
24	You have your own home with your own front door	5	6	6
25	In a nice area with attractive surroundings	3	0	0
26	Being seen as form of care home	-4	-6	-3
27	Freedom to live as you choose: no requirement to join in or	2	0	0
28	Independent living	5	0	0
29	Able to have your say and raise matters with senior management	-2	2	2
30	Residents are engaged and able to exercise choice and control	0	1	-2
31	Residents are treated with dignity and respect	4	2	1
32	Some other residents behave badly	-6	-5	-6
33	Residents who take control and assume responsibility for organising things	-3	-2	-3
34	People don't respect privacy or confidentiality	-3	-4	-6
35	Gossip spreads quickly	-6	-5	-4
36	Residents with dementia or who need to be looked after	-3	5	-3
37	Living in close proximity to others in a compact community	-4	-3	-4
38	Small flats	-5	-6	-4
39	Properties and facilities that are modern and well-designed	-1	5	3
40	Buildings and gardens are kept clean and tidy	-1	1	0
41	Contemporary kitchens and bathrooms	1	3	2
42	Checks on fire, electrical, gas, asbestos and water safety	-1	2	4
43	Everyone is kept informed and up to date about local plans and activities	-2	2	1
44	Information about costs and charges is correct, clear and comprehensive	-1	4	3
45	Wide doors, that are easy to open, for people with reduced mobility	-3	-2	0
46	A reliable lift	-2	-2	-1
47	A suitable storage area for buggies and other large items	-2	0	-1
48	Good staff who provide consistency of service	0	-1	2
49	Common lounge used by external organisations and groups	-1	-3	-5
50	Guest room available for visitors	1	0	1

# Retirement Housing Site G

## Correlation Matrix Between Sorts

SORTS		1	2	3	4	5	6	7	8	9	10	11	12	13
1 G R1	100	48	46	38	47	47	22	41	38	29	20	27	35	
2 G R2	48	100	43	39	47	29	28	24	22	22	17	25	28	
3 G R3	46	43	100	49	45	53	38	34	38	36	25	50	47	
4 G R4	38	39	49	100	56	54	38	43	59	49	57	40	40	
5 G R5	47	47	45	56	100	46	32	62	45	57	36	44	55	
6 G R6	47	29	53	54	46	100	39	47	37	32	15	34	45	
7 G R7	22	28	38	38	32	39	100	44	31	22	11	44	55	
8 G R8	41	24	34	43	62	47	44	100	37	58	16	37	64	
9 G R9	38	22	38	59	45	37	31	37	100	48	56	47	47	
10 G R10	29	22	36	49	57	32	22	58	48	100	39	63	38	
11 G R11	20	17	25	57	36	15	11	16	56	39	100	29	10	
12 G R12	27	25	50	40	44	34	44	37	47	63	29	100	47	
13 G R13	35	28	47	40	55	45	55	64	47	38	10	47	100	

### Two factors identified from the sorts of the 13 Retirement Housing resident participants at Site G.

Search for 7 Factors provides 61% explanation of variation with significant loadings on only five out of seven Factors and one of these had just one defining sort.

Search for 5 Factors provides 56% explanation of variation with significant loadings on four out of five Factors, but one of these had just one defining sort.

Search for 4 Factors provides 53% explanation of variation and significant loadings on three out of four Factors.

Search for 3 Factors provides 44% explanation of variation with significant loadings on two out of three Factors.

Search for 2 Factors provides 46% explanation of variation and significant loadings on both Factors with seven defining sorts for one and four defining sorts for the other Factor, but two sorts did not load significantly on either of the Factors at a 0.5 significance level. Selected as basis for analysis

<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>F6</b>	<b>F7</b>	<b>C</b>	<b>NS</b>
4, 9, 10, 12	1, 2, 3	-	5, 8	11	7, 13	-	-	6
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>C</b>	<b>NS</b>		
4, 9, 10, 12	1, 2, 3	-	8, 13	11	-	5, 6, 7		
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>C</b>	<b>NS</b>			
7, 8, 13	1, 2, 3	-	4, 9, 10, 11, 12	-	5, 6			
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>C</b>	<b>NS</b>				
4, 5, 8, 9, 10, 12, 13	1, 2, 3	-	-	-	6, 7, 11			
<b>F1</b>	<b>F2</b>	<b>C</b>	<b>NS</b>					
4, 5, 8, 9, 10, 12, 13	1, 2, 3, 6	-	7, 11					

### Factor Matrix with an X Indicating a Defining Sort

QSORT		1	2
1	G Res1	0.1790	0.6909X
2	G Res2	0.1259	0.6138X
3	G Res3	0.3908	0.5846X
4	G Res4	0.5973X	0.4706
5	G Res5	0.5866X	0.5018
6	G Res6	0.3916	0.5204X
7	G Res7	0.4462	0.2879
8	G Res8	0.5448X	0.4006
9	G Res9	0.7200X	0.1795
10	G Res10	0.6857X	0.1973
11	G Res11	0.4525	0.1226
12	G Res12	0.6385X	0.2345
13	G Res13	0.5523X	0.3998
% expl.Var.		27	19
Eigenvalues		3.51	2.47

### Correlations Between Factor Scores

	1	2
1	1.0000	0.6247
2	0.6247	1.0000

### Distribution of Retirement Housing Site G Sorts across Two Perspectives



### **RH Site G Perspective 1 – Own Home and Age Exclusive**

This perspective want to have their own home with their own front door (#24: +6) but to restrict occupancy only to those older people who are retired and aged over 65 (#12: +6). They also value having a court manager to provide help and advice (#1: +5) and would be less concerned about them living on-site (#2: -1) than being only employed on a part-time basis (#3: -4). They want to feel safe and secure (#17: +5) but having security of tenure (#14: +2) and the peace of mind of being looked after (#10: +2) are less important than being treated with dignity and respect (#31: +4). They want to be able to live independently (#28: +4) and be able to raise matters with senior management (#29: +3) but do not want to exercise choice or control (#30: -2). They appreciate having a pull-cord or pendant to summons help in an emergency (#21: +3).

They enjoy living around people of a similar age and outlook (#11: +3) but that does not mean that they necessarily want to create a sense of community (#23: +1) and living in close proximity to others is seen as a negative (#37: -2). Although they appreciate having a communal lounge (#9: +3), they do not necessarily want to get involved in social events and activities (#19: -1) and even the companionship of neighbours is not seen as a particular priority (#8: +1). They appreciate being close to shops, amenities and transport (#4: +4), but have little or no interest in connectivity to the internet (#20: -5).

### **RH Site G Perspective 2 – Court Manager and Safe Tenure**

The availability of help and advice from a court manager is a top priority for this perspective (#1: +6) but they definitely do not want them to live on-site (#2: -3) or be only employed part-time (#3: -5). They want to feel safe and secure (#17: +4) and be treated with dignity and respect (#31: +5), but do not need to be looked after (#10: 0). They want to be able to live independently (#28: +4) and be able to raise matters with senior management (#29: +3) but do not want to exercise choice or control (#30: -2).

## Retirement Housing Site G Factor Arrays

No.	Statement	1	2
1	A court manager to turn to if you need help and advice	5	6
2	A resident manager or warden who lives on-site	-1	-3
3	A court manager who is only employed on a part-time basis	-4	-5
4	Close to shops, amenities and transport	4	0
5	No need to worry about maintenance and repairs	2	1
6	Repairs or problems are addressed and fixed quickly	0	3
7	The appearance of the Court creates a good impression	-1	-1
8	Companionship of neighbours so you are never lonely	1	-2
9	Use of a communal lounge and other shared facilities	3	1
10	Peace of mind that comes from being looked after	2	0
11	Living around people of a similar age and outlook	3	-2
12	Occupancy restricted to only retired people aged over 65	6	-3
13	Residents are able to have dogs, cats or other pets	-2	0
14	Having security of tenure	2	6
15	A communal laundry room with washers and dryers	0	4
16	An effective and efficient heating and hot water system	2	3
17	Feeling safe and secure	5	4
18	A garden or balcony so you can sit out in private	-2	-1
19	Social events and activities to get involved in	-1	1
20	Availability of a good internet connection and/or wifi	-5	2
21	Pull-cord or pendant to summon help in an emergency	3	0
22	Sufficient car parking spaces	0	-2
23	Community spirit and friendship with people of similar age and outlook	1	-1
24	You have your own home with your own front door	6	1
25	In a nice area with attractive surroundings	1	0
26	Being seen as form of care home	-4	-4
27	Freedom to live as you choose: no requirement to join in or conform	2	2
28	Independent living	4	5
29	Able to have your say and raise matters with senior management	3	3
30	Residents are engaged and able to exercise choice and control	-2	3
31	Residents are treated with dignity and respect	4	5
32	Some other residents behave badly	-6	-6
33	Residents who take control and assume responsibility for organising things	-2	-4
34	People don't respect privacy or confidentiality	-4	-5
35	Gossip spreads quickly	-6	-6
36	Residents with dementia or who need to be looked after	-1	-1
37	Living in close proximity to others in a compact community	-2	-3
38	Small flats	-5	-4
39	Properties and facilities that are modern and well-designed	-1	1
40	Buildings and gardens are kept clean and tidy	-1	-1
41	Contemporary kitchens and bathrooms	0	2
42	Checks on fire, electrical, gas, asbestos and water safety	0	4
43	Everyone is kept informed and up to date about local plans and activities	1	1
44	Information about costs and charges is correct, clear and comprehensive	0	2
45	Wide doors, that are easy to open, for people with reduced mobility	1	-2
46	A reliable lift	-3	-1
47	A suitable storage area for buggies and other large items	-3	-3
48	Good staff who provide consistency of service	1	2
49	Common lounge used by external organisations and groups	-3	-2
50	Guest room available for visitors	-3	0

# Retirement Housing Site H

## Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7	8	9	10	11	12	13	14
1 H Res1	100	58	55	44	53	55	52	58	54	47	40	33	63	20
2 H Res2	58	100	48	45	44	50	41	60	49	37	29	43	35	21
3 H Res3	55	48	100	64	61	52	50	48	61	35	52	58	55	40
4 H Res4	44	45	64	100	54	41	73	56	70	45	55	39	37	38
5 H Res5	53	44	61	54	100	62	58	53	52	56	59	47	56	31
6 H Res6	55	50	52	41	62	100	40	37	63	60	50	32	52	34
7 H Res7	52	41	50	73	58	40	100	59	69	59	44	38	48	40
8 H Res8	58	60	48	56	53	37	59	100	57	45	40	34	32	6
9 H Res9	54	49	61	70	52	63	69	57	100	51	48	33	50	45
10 H Res10	47	37	35	45	56	60	59	45	51	100	46	27	48	22
11 H Res11	40	29	52	55	59	50	44	40	48	46	100	39	46	16
12 H Res12	33	43	58	39	47	32	38	34	33	27	39	100	32	28
13 H Res13	63	35	55	37	56	52	48	32	50	48	46	32	100	50
14 H Res14	20	21	40	38	31	34	40	6	45	22	16	28	50	100

Three factors were identified from the sorts of the 14 Retirement Housing resident participants at Site H.

Search for 7 Factors provides 66% explanation of variation with significant loadings on six out of seven Factors but one of these had just one defining sort.

Search for 6 Factors provides 60% explanation of variation, but significant loadings on only four out of six Factors.

Search for 4 Factors provides 57% explanation of variation and significant loadings on three out of four Factors.

Search for 3 Factors provides 56% explanation of variation and at least two significant loadings on all three Factors. Three sorts did not load significantly on any of the Factors and one sort was confounded on more than one Factor at a 0.5 significance level, but still selected as basis for analysis

<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>F6</b>	<b>F7</b>	<b>C</b>	<b>NS</b>
5, 6, 10, 11	4, 7, 9	13, 14	8	3, 12	-	1, 2	-	-
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>C</b>	<b>NS</b>		
1, 6, 13, 10	7, 8	14	-	3, 12	5	2, 4, 9 11		
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>C</b>	<b>NS</b>			
1, 5, 6, 10, 13	7, 8, 9	14	-	3, 4	2, 11, 12			
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>C</b>	<b>NS</b>				
1, 5, 6, 10, 13	7, 8, 9	3, 14	4	2, 11, 12				

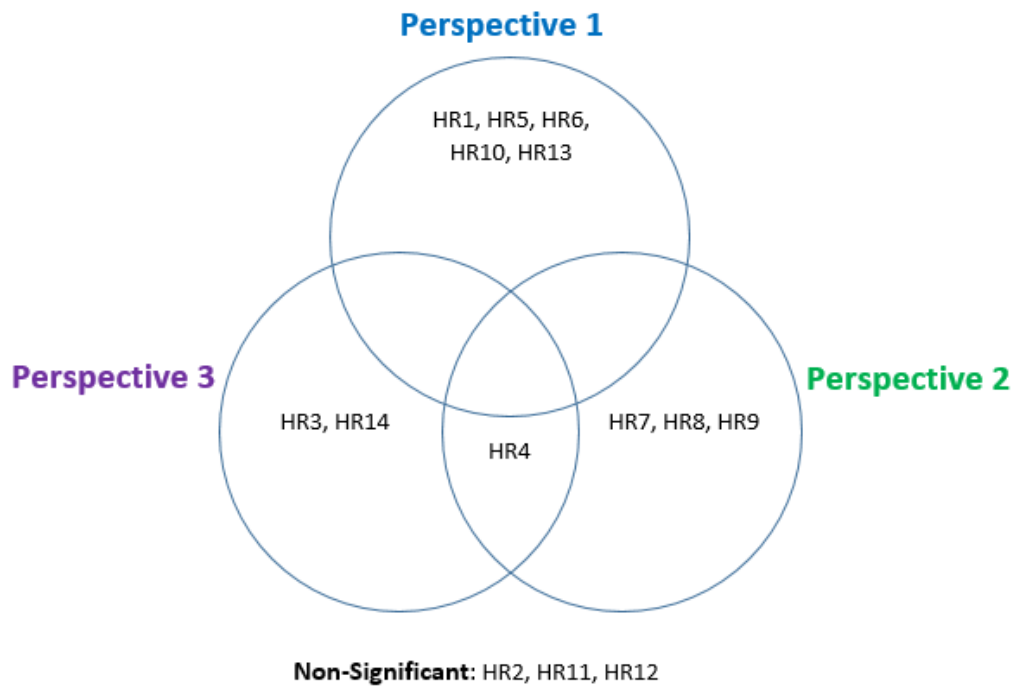
### Factor Matrix with an X Indicating a Defining Sort

QSORT		1	2	3
1 H Res1		0.6435X	0.4225	0.1310
2 H Res2		0.4018	0.4474	0.2408
3 H Res3		0.4931	0.2277	0.6126X
4 H Res4		0.2246	0.5161	0.6210
5 H Res5		0.6876X	0.2530	0.3711
6 H Res6		0.6532X	0.3032	0.2282
7 H Res7		0.2562	0.6481X	0.4703
8 H Res8		0.3257	0.7854X	0.0597
9 H Res9		0.3787	0.5425X	0.4979
10 H Res10		0.5651X	0.3510	0.1749
11 H Res11		0.4860	0.2381	0.3505
12 H Res12		0.3867	0.1319	0.3955
13 H Res13		0.5937X	0.1586	0.3915
14 H Res14		0.1491	0.0748	0.5439X
% expl.Var.		23	17	16
Eigenvalues		3.22	2.38	2.24

### Correlations Between Factor Scores

	1	2	3
1	1.0000	0.6987	0.6409
2	0.6987	1.0000	0.5317
3	0.6409	0.5317	1.0000

### Distribution of Retirement Housing Site H Sorts across Three Perspectives





### **RH Site H Perspective 1 – Supported Independence, Warm and Secure**

This perspective wants the support of a court manager who can provide help and advice (#1: +6) so they feel safe and secure (#17: +6). They do not particularly want a manager who lives on-site (#2: -2) but would really oppose a manager only employed on a part-time basis (#3: -5). They also appreciate having the means to summons help in an emergency (#21: +4).

They want the warmth of an effective and efficient heating and hot water system (#16: +5) but also want to know that the systems have been checked for safety (#42: +5).

Residents with this perspective want to live independently (#28: +4) and although they want the support of a Court manager do not particularly want to feel that they are being looked after (#10: +2). They want freedom to live as they choose and to decide whether to join in or not, but this does not seem to be a high priority (#27: +1) but this might be because they have significantly negative view of social events and activities (#19: -4). They support occupancy being restricted to only older people aged over 65 (#12: +2), but do not appear to value living around or the community spirit of people of a similar age and outlook (#11: 0; #23: 0) and do not feel the need for companionship (#8: -2).

### **RH Site H Perspective 2 – Own Home, Dignity and Amenity**

This perspective wants to be safe and secure (#17: +6) and be treated with dignity and respect (#31: +6). This comes from having their own home and front door (#24: +5) and peace of mind that this gives in terms of being looked after (#10: +5), but they do not consider the help and advice of the court manager is a significant advantage (#1: +2). They want a manager who lives on-site (#2: -2) but a part-time manager would be worse (#3: -4). They do want the companionship of neighbours (#8: +4) and appreciate having a communal lounge and other shared facilities (#9: +3).

They do not though see an advantage in living around people of a similar age and outlook (#11: -1) or regard that is important in creating a sense of community (#23: +1). They do not think therefore that occupancy should be restricted to only those aged over 65 (#12: -2). Perhaps because they only have a limited interest in social events and activities (#19: +1) they do not see the need to retain the right to choose whether or not to join in (#27: -1), but they also do not seem to prioritise living independently (#28: +1) or being able to have their say with senior management (#29: 0).

They want to be close to shops, amenities and transport (#4: +4) but see no value in having access to the internet or a wifi connection (#20: -6). Having their home repaired and maintained is seen as being more important (#5: +3; #6: +3) than ensuring that they have security of tenure (#14: +1) or that safety checks are carried out (#42: +2).

### **RH Site H Perspective 3 – On-Site Manager, Protected and Community Spirit**

The highest priority for this perspective is not just having a court manager for help and advice (#1: +6), but ensuring that they also live on-site (#2: +6) and they definitely do not only work on a part-time basis (#3: -6). They want to feel safe and secure (#17: +5) and be looked after (#10: +4) with a pull-cord or pendant to summons help in an emergency

**(#21: +5). They see it as positive that it is possible for residents with dementia or who need to be looked after to be able to live in Retirement Housing (#36: +2) but not good for residents to have dogs, cats or other pets (#13: -4).**

**They want a consistency of service from good staff (#48: +4), but are not especially concerned about whether they retain their independent living (#28: +2) or are being treated with dignity and respect (#31: +2). They see some benefit of a community spirit and friendship with others of a similar age and outlook (#23: +4), but are not concerned for occupancy to be limited to those aged over 65 (#12: 0), or living with other older people (#11: +1) and are not seeking the companionship of neighbours (#8: -2). They appreciate having a communal lounge (#9: +3) and do not necessarily see it as a problem if it is used by external organisations and groups (49: +2).**

### Retirement Housing Site H Factor Arrays

No.	Statement	1	2	3
1	A court manager to turn to if you need help and advice	6	2	6
2	A resident manager or warden who lives on-site	-2	-2	6
3	A court manager who is only employed on a part-time basis	-5	-4	-6
4	Close to shops, amenities and transport	0	4	-3
5	No need to worry about maintenance and repairs	2	3	3
6	Repairs or problems are addressed and fixed quickly	2	3	2
7	The appearance of the Court creates a good impression	1	2	0
8	Companionship of neighbours so you are never lonely	-2	4	-2
9	Use of a communal lounge and other shared facilities	-1	3	3
10	Peace of mind that comes from being looked after	2	5	4
11	Living around people of a similar age and outlook	0	-1	1
12	Occupancy restricted to only retired people aged over 65	2	-2	0
13	Residents are able to have dogs, cats or other pets	-3	-4	-4
14	Having security of tenure	4	1	0
15	A communal laundry room with washers and dryers	2	2	-1
16	An effective and efficient heating and hot water system	5	4	1
17	Feeling safe and secure	6	6	5
18	A garden or balcony so you can sit out in private	-2	-3	-1
19	Social events and activities to get involved in	-4	1	0
20	Availability of a good internet connection and/or wifi	-1	-6	-1
21	Pull-cord or pendant to summon help in an emergency	4	1	5
22	Sufficient car parking spaces	3	-3	1
23	Community spirit and friendship with people of similar age and outlook	0	1	4
24	You have your own home with your own front door	3	5	-2
25	In a nice area with attractive surroundings	3	0	2
26	Being seen as form of care home	-4	-3	-3
27	Freedom to live as you choose: no requirement to join in or conform	1	-1	-2
28	Independent living	4	1	2
29	Able to have your say and raise matters with senior management	1	0	-2
30	Residents are engaged and able to exercise choice and control	-1	-2	1
31	Residents are treated with dignity and respect	1	6	2
32	Some other residents behave badly	-3	-6	-6
33	Residents who take control and assume responsibility for organising things	-3	-1	-3
34	People don't respect privacy or confidentiality	-5	-4	-5
35	Gossip spreads quickly	-6	-5	-4
36	Residents with dementia or who need to be looked after	-2	-2	2
37	Living in close proximity to others in a compact community	-3	0	-2
38	Small flats	-6	-5	-5
39	Properties and facilities that are modern and well-designed	-1	0	-1
40	Buildings and gardens are kept clean and tidy	0	2	-1
41	Contemporary kitchens and bathrooms	-1	0	-4
42	Checks on fire, electrical, gas, asbestos and water safety	5	2	1
43	Everyone is kept informed and up to date about local plans and activities	1	-1	0
44	Information about costs and charges is correct, clear and comprehensive	0	-1	-3
45	Wide doors, that are easy to open, for people with reduced mobility	-1	0	3
46	A reliable lift	1	-1	0
47	A suitable storage area for buggies and other large items	-2	-3	1
48	Good staff who provide consistency of service	3	3	4
49	Common lounge used by external organisations and groups	-4	-2	2
50	Guest room available for visitors	0	1	-2

# Retirement Housing Site I

## Correlation Matrix Between Sorts

SORTS		1	2	3	4	5	6	7	8	9	10
1	I R1	100	44	38	63	28	41	16	44	48	6
2	I R2	44	100	26	52	65	44	37	63	62	13
3	I R3	38	26	100	31	16	23	24	34	33	24
4	I R4	63	52	31	100	45	40	35	49	59	3
5	I R5	28	65	16	45	100	40	47	34	49	22
6	I R6	41	44	23	40	40	100	53	55	49	18
7	I R7	16	37	24	35	47	53	100	39	33	8
8	I R8	44	63	34	49	34	55	39	100	62	16
9	I R9	48	62	33	59	49	49	33	62	100	22
10	I R10	6	13	24	3	22	18	8	16	22	100

### Three factors identified from the sorts of the 10 Retirement Housing resident participants at Site I.

Search for 7 Factors provides 61% explanation of variation with significant loadings on five out of seven Factors, but two of these had just one defining sort each.

Search for 5 Factors provides 50% explanation of variation with significant loadings on four out of five Factors, but with two of these having just one defining sort.

Search for 4 Factors provides 53% explanation of variation and significant loadings on all four Factors but two of these had just one defining sort.

Search for 3 Factors provides 49% explanation of variation and has at least two defining sorts on all three Factors and even though three sorts did not load significantly on any of the Factors at a 0.5 significance level this was selected as basis for analysis.

F1	F2	F3	F4	F5	F6	F7	C	NS
-	5	1, 4	2, 8, 9	10	6, 7	-	-	3
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>C</b>	<b>NS</b>		
1, 4	5	-	6, 7	10	-	2, 3, 8, 9		
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>C</b>	<b>NS</b>			
2	5	1, 4	6, 7, 8	-	3, 9, 10			
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>C</b>	<b>NS</b>				
2, 8, 9	5, 7	1, 4	-	3, 6, 10				

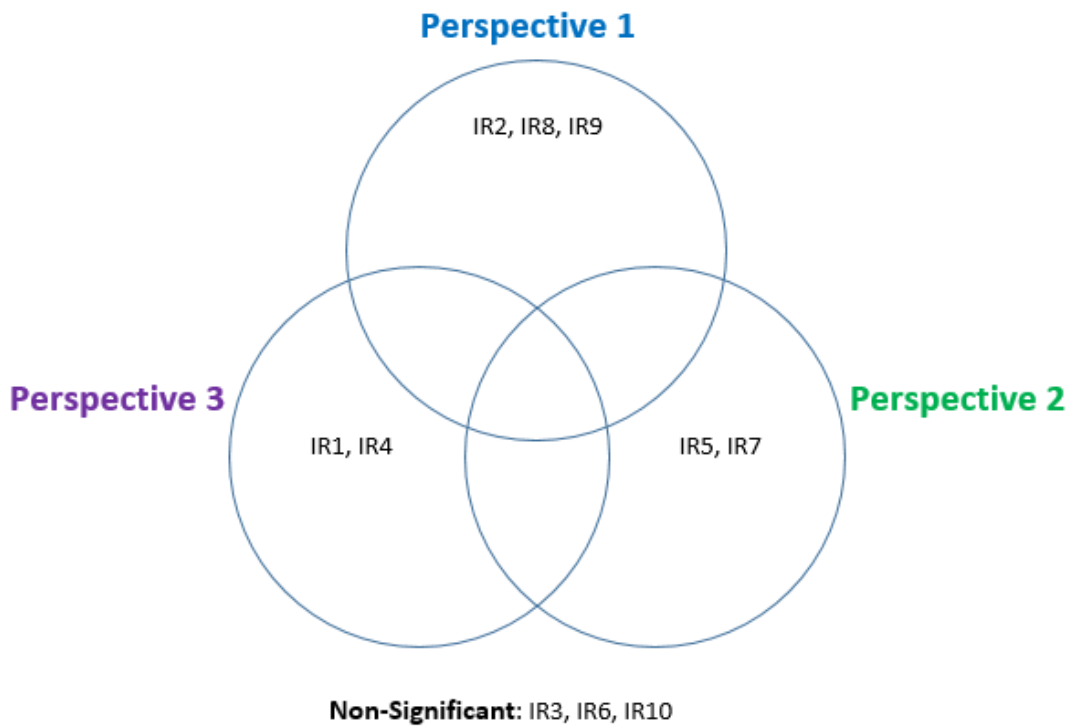
### Factor Matrix with an X Indicating a Defining Sort

QSORT		1	2	3
1	I Res1	0.2336	0.1268	0.8042X
2	I Res2	0.5772X	0.3839	0.3221
3	I Res3	0.3281	0.1266	0.2932
4	I Res4	0.4918	0.1812	0.5461X
5	I Res5	0.2034	0.8511X	0.1706
6	I Res6	0.4922	0.4069	0.2254
7	I Res7	0.3162	0.5217X	0.0817
8	I Res8	0.5632X	0.3353	0.3491
9	I Res9	0.5961X	0.3273	0.4022
10	I Res10	0.1696	0.1310	0.0794
% expl.Var.		18	16	15
Eigenvalues		1.8	1.6	1.5

### Correlations Between Factor Scores

	1	2	3
1	1.0000	0.5946	0.5932
2	0.5946	1.0000	0.3548
3	0.5932	0.3548	1.0000

### Distribution of Retirement Housing Site I Sorts across Three Perspectives



### **RH Site I Perspective 1 – Own Home with Dignity and Freedom**

Being treated with dignity and respect is essential for residents with this perspective (#31: +6) and so want good staff who can provide the service they desire (#48: +4). The court manager is therefore very important (#1: +5) but it would not be desirable for them to either live on-site (#2: -1) or merely part-time (#3: -2).

They insist on having their own home and own front door (#24: +6) but do not seem concerned about their security of tenure (#14: 0) or to be worried about repairs and maintenance (#5: +1). They want to be independent (#28: +3) and ensure they have the freedom to live as they choose to without needing to join in or conform (#27: +4).

They do not object to living in close proximity to others (#37: 0). Although they appreciate the companionship of their neighbours, they do not necessarily feel a sense of community with people of a similar age and outlook (#11: 0; #23: -1) or want to get involved in social activities with them (#19: 0). They do not think residents should be allowed to keep pets (#13: -6) or that Retirement Housing is suitable for those living with dementia or in need of care (#36: -4), but they would prefer occupancy not to be limited to those over retirement age (#12: -2).

The Court should be in a nice setting (#25: +1), create a positive impression (#7: +2) and be kept clean and tidy (#40: +2), but it is much more important for it to be conveniently located near to shops, amenities and transport (#4: +5). The provision of a communal lounge receives only limited support (#9: +1), but a laundry with washers and dryers is appreciated much more (#15: +4).

### **RH Site I Perspective 2 – A Home without Community**

Having your own home with its own front door is the most important consideration (#24: +6) for this perspective. They want this to have the convenience of being close to shops, amenities and transport (#4: +5), but are not seem concerned about being connected to the internet or wifi (#20: -5). They want to be able to live independently (#28: +4) with security of tenure (#14: +3), but do not seem too concerned about being seen as form of care home (#26: +2) despite not wanting residents who are living with dementia or needing to be looked after (#36: -4).

Although having a court manager they can turn to for help and advice (#1: +6) and a pull-cord or pendant to summons help in an emergency (#21: +5) are also top priorities, feeling safe and secure (#17: +2) and being looked after (#10: +2) are not quite so important.

This perspective seems remarkably tolerant of bad behaviour of other residents (#32: 0) and lack of privacy (#34: -1). What they really do not like or want are social events and activities (#19: -6), particularly if these involve outside groups (#49: -6). They do not want to be engaged and involved in making choices or exercising control (#30: -5). They do not like living in close proximity to other residents (#37: -3) or being with others of a similar age and outlook (#11: -4) and do not want to establish a community spirit with them (#23: -3) or even see particular value the companionship of neighbours (#8: -1).

The things that are important to this perspective tend to relate to the property rather than the people in it. They appreciate the availability of a laundry (#15: +4) more than a communal lounge (#9: -2). They also want a reliable lift (#46: +4); to not need to worry about repairs (#5: +3) and getting things fixed quickly (#6: +3); having the building and gardens kept clean and tidy (#40: +3) so it gives a good impression (#7: +2) and having a guest room for visitors (#50: +2).

## RH Site I Perspective 3 – Safety and Security without Support

This view wants to feel safe and secure (#17: +6), but this comes from an absence of worry about repairs and maintenance (#5: +6), having security of tenure (#14: +5), an effective and efficient heating and hot water system (#16: +4), a reliable Lift (#46: +5) and checks on fire, electrical, gas, asbestos and water safety (#42: +4). Having their own home and front door, however, is not something they consider needs to be prioritised (#24: 0), perhaps because it is taken for granted.

The help and advice of a court manager is not highly valued (#1: +3) and this perspective would be neutral about the court manager only being employed on a part-time basis (#3: 0). They do not want to be looked after (#10: -1) and want to live independently (#28: +3) with respect (#31: +3). They are clear that occupancy should not just be for retired people aged over 65 (#12: -4) and although they don't have a particular preference for living with other people of a similar age and outlook (#11: -1) they do want the friendship from being part of a community (#23: +3) and the companionship of neighbours (#8: +2). They do not want a garden or balcony where they can be private (#18: -5). They think the communal laundry (#15: +2) is of greater benefit and importance than the communal lounge (#9: +1).

## Retirement Housing Site I Factor Arrays

No.	Statement	1	2	3
1	A court manager to turn to if you need help and advice	5	6	3
2	A resident manager or warden who lives on-site	-1	-2	-2
3	A court manager who is only employed on a part-time basis	-2	-2	0
4	Close to shops, amenities and transport	5	5	1
5	No need to worry about maintenance and repairs	1	3	6
6	Repairs or problems are addressed and fixed quickly	3	3	1
7	The appearance of the Court creates a good impression	2	2	-4
8	Companionship of neighbours so you are never lonely	2	-1	2
9	Use of a communal lounge and other shared facilities	1	-2	1
10	Peace of mind that comes from being looked after	2	2	-1
11	Living around people of a similar age and outlook	0	-4	-1
12	Occupancy restricted to only retired people aged over 65	-2	0	-4
13	Residents are able to have dogs, cats or other pets	-6	-4	-3
14	Having security of tenure	0	3	5
15	A communal laundry room with washers and dryers	4	4	2
16	An effective and efficient heating and hot water system	2	0	4
17	Feeling safe and secure	3	2	6
18	A garden or balcony so you can sit out in private	-3	-1	-5
19	Social events and activities to get involved in	0	-6	2
20	Availability of a good internet connection and/or wifi	-1	-5	-4
21	Pull-cord or pendant to summon help in an emergency	3	5	4
22	Sufficient car parking spaces	-1	0	-2
23	Community spirit and friendship with people of similar age and outlook	-1	-3	3
24	You have your own home with your own front door	6	6	0
25	In a nice area with attractive surroundings	1	0	-2
26	Being seen as form of care home	-4	2	-3
27	Freedom to live as you choose: no requirement to join in or conform	4	1	0
28	Independent living	3	4	3
29	Able to have your say and raise matters with senior management	-3	-1	-1
30	Residents are engaged and able to exercise choice and control	-2	-5	0
31	Residents are treated with dignity and respect	6	1	3
32	Some other residents behave badly	-6	0	-6
33	Residents who take control and assume responsibility for organising things	-3	-3	-4
34	People don't respect privacy or confidentiality	-5	-1	-6
35	Gossip spreads quickly	-5	-2	-5
36	Residents with dementia or who need to be looked after	-4	-4	-1
37	Living in close proximity to others in a compact community	0	-3	-1
38	Small flats	-2	-3	-2
39	Properties and facilities that are modern and well-designed	1	1	-2
40	Buildings and gardens are kept clean and tidy	2	3	0
41	Contemporary kitchens and bathrooms	-1	1	-3
42	Checks on fire, electrical, gas, asbestos and water safety	0	-2	4
43	Everyone is kept informed and up to date about local plans and activities	1	-1	1
44	Information about costs and charges is correct, clear and comprehensive	-1	1	2
45	Wide doors, that are easy to open, for people with reduced mobility	1	-1	2
46	A reliable lift	0	4	5
47	A suitable storage area for buggies and other large items	-4	0	-1
48	Good staff who provide consistency of service	4	1	1
49	Common lounge used by external organisations and groups	-3	-6	0
50	Guest room available for visitors	-2	2	-1

# Retirement Housing Site J

## Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
1 Jres1	100	49	44	69	46	61	58	59	45	53	28	57	59	35	69	33	57	21	28	62	46	57	59	52
2 Jres2	49	100	32	44	46	33	37	69	48	41	28	49	28	17	50	27	34	27	36	39	39	29	43	35
3 Jres3	44	32	100	64	34	42	62	50	57	33	27	37	50	49	53	54	65	47	46	30	59	45	44	65
4 Jres4	69	44	64	100	45	66	69	60	48	48	29	69	66	43	65	42	75	31	49	52	55	52	59	57
5 Jres5	46	46	34	45	100	35	47	58	19	32	30	37	44	23	32	32	43	2	19	45	33	29	41	23
6 Jres6	61	33	42	66	35	100	57	37	31	48	26	58	59	37	53	39	64	18	24	46	45	60	72	45
7 Jres7	58	37	62	69	47	57	100	49	47	44	28	57	62	44	61	54	67	24	45	34	51	53	67	58
8 Jres8	59	69	50	60	58	37	49	100	54	55	37	56	42	41	73	40	62	37	45	56	49	42	41	46
9 Jres9	45	48	57	48	19	31	47	54	100	41	33	52	35	57	69	49	63	59	59	35	61	55	40	68
10 Jres10	53	41	33	48	32	48	44	55	41	100	18	51	23	23	52	16	49	17	23	36	31	55	34	36
11 Jres11	28	28	27	29	30	26	28	37	33	18	100	40	13	45	37	32	32	34	22	32	33	38	35	21
12 Jres12	57	49	37	69	37	58	57	56	52	51	40	100	54	40	53	34	69	21	52	53	58	50	53	54
13 Jres13	59	28	50	66	44	59	62	42	35	23	13	54	100	50	47	31	70	28	53	45	50	38	48	55
14 Jres14	35	17	49	43	23	37	44	41	57	23	45	40	50	100	56	47	59	43	45	33	50	51	33	55
15 Jres15	69	50	53	65	32	53	61	73	69	52	37	53	47	56	100	50	72	52	44	45	62	63	66	63
16 Jres16	33	27	54	42	32	39	54	40	49	16	32	34	31	47	50	100	57	31	35	25	50	44	47	37
17 Jres17	57	34	65	75	43	64	67	62	63	49	32	69	70	59	72	57	100	43	65	47	73	62	59	67
18 Jres18	21	27	47	31	2	18	24	37	59	17	34	21	28	43	52	31	43	100	42	26	45	28	19	49
19 Jres19	28	36	46	49	19	24	45	45	59	23	22	52	53	45	44	35	65	42	100	33	52	35	26	52
20 Jres20	62	39	30	52	45	46	34	56	35	36	32	53	45	33	45	25	47	26	33	100	41	36	39	34
21 Jres21	46	39	59	55	33	45	51	49	61	31	33	58	50	50	62	50	73	45	52	41	100	42	41	56
22 Jres22	57	29	45	52	29	60	53	42	55	55	38	50	38	51	63	44	62	28	35	36	42	100	67	60
23 Jres23	59	43	44	59	41	72	67	41	40	34	35	53	48	33	66	47	59	19	26	39	41	67	100	54
24 Jres24	52	35	65	57	23	45	58	46	68	36	21	54	55	55	63	37	67	49	52	34	56	60	54	100

**Four factors identified from the sorts of the 24 Retirement Housing resident participants at Site J.**

Search for 7 Factors provides 67% explanation of variation and significant loadings on six out of seven Factors but two of these had just one defining sort.

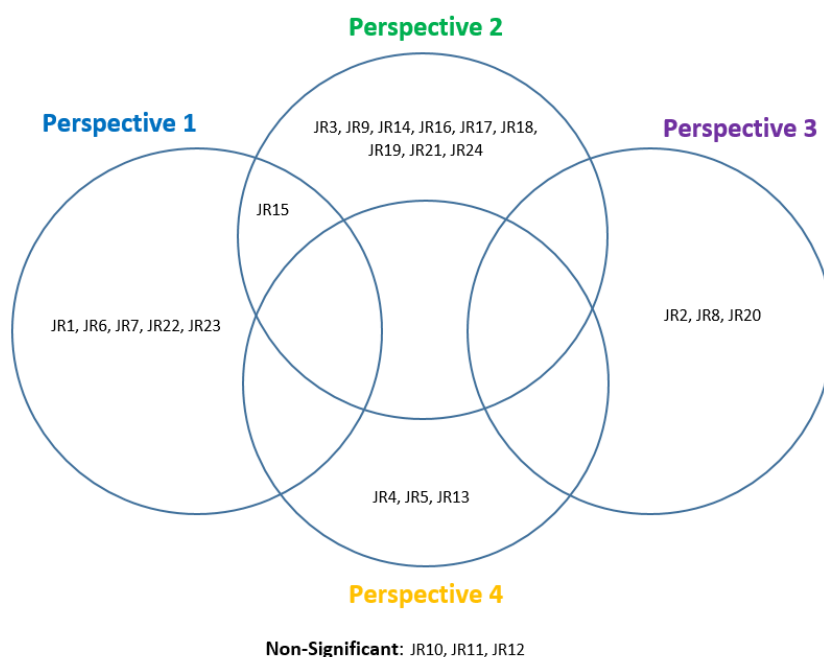
Search for 6 Factors provides 63% explanation of variation and significant loadings on five out of six Factors, but one of these had just one defining sort.

Search for 5 Factors provides 60% explanation of variation with significant loadings on four out of five Factors.

Search for 4 Factors provides 60% explanation of variation and significant loadings on all three Factors. Three sorts did not load significantly on any of the Factors and one sort was confounded on more than one Factor at a 0.5 significance level but still selected as basis for analysis.

<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>F6</b>	<b>F7</b>	<b>C</b>	<b>NS</b>
1, 6, 22, 23	3, 9, 14, 18, 19, 21, 24	2, 8	4, 12, 13	-	5	11	15, 17	7, 10, 16, 20
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>F6</b>	<b>C</b>	<b>NS</b>	
1, 6, 7, 15, 22, 23	3, 9, 14, 18, 19, 21, 24	2, 8	4, 12, 13	-	5	17	10, 11, 16, 20	
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>C</b>	<b>NS</b>		
1, 6, 7, 22, 23	3, 9, 14, 16, 17, 18, 19, 21, 24	2, 8, 20	4, 5, 13	-	15	10, 11, 12		
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>C</b>	<b>NS</b>			
1, 6, 7, 22, 23	3, 9, 14, 16, 17, 18, 19, 21, 24	2, 8, 20	4, 5, 13	15	10, 11, 12			

**Distribution of Retirement Housing Site J Sorts across Four Perspectives**





## Factor Matrix with an X Indicating a Defining Sort

QSORT	Loadings			
	1	2	3	4
1 J res1	0.5927X	0.1301	0.4939	0.3090
2 J res2	0.1683	0.1888	0.7319X	0.0788
3 J res3	0.3635	0.5699X	0.1090	0.3138
4 J res4	0.4995	0.3222	0.3463	0.5113X
5 J res5	0.1747	0.0297	0.3733	0.5673X
6 J res6	0.6832X	0.1398	0.1644	0.3927
7 J res7	0.5466X	0.3625	0.1600	0.4568
8 J res8	0.1632	0.3944	0.7481X	0.2395
9 J res9	0.2804	0.7535X	0.3519	-0.0587
10 J res10	0.4507	0.1387	0.4246	0.0833
11 J res11	0.1377	0.3238	0.2888	0.1218
12 J res12	0.3735	0.3122	0.4740	0.3782
13 J res13	0.3903	0.3151	0.1108	0.5791X
14 J res14	0.1914	0.6826X	0.0729	0.2267
15 J res15	0.5868	0.5067	0.4153	0.0974
16 J res16	0.2404	0.5166X	0.0817	0.2794
17 J res17	0.4098	0.5990X	0.2791	0.4687
18 J res18	0.0562	0.6828X	0.1757	-0.0862
19 J res19	0.1063	0.5464X	0.2133	0.3094
20 J res20	0.2515	0.1669	0.5117X	0.3218
21 J res21	0.2325	0.6123X	0.2676	0.3075
22 J res22	0.6498X	0.3716	0.2347	0.0742
23 J res23	0.7014X	0.2414	0.1838	0.2487
24 J res24	0.4951	0.5757X	0.1711	0.1417
% expl.Var.	17	20	13	10
Eigenvalues	4.08	4.80	3.12	2.40

## Correlations Between Factor Scores

	1	2	3	4
1	1.0000	0.6471	0.5760	0.7334
2	0.6471	1.0000	0.5943	0.6202
3	0.5760	0.5943	1.0000	0.6515
4	0.7334	0.6202	0.6515	1.0000

## RH Site J Perspective 1 – Tenure, Respect and Age

Having security of tenure (#14: +6) make residents of this perspective feel safe and secure (#17: +6) in their own homes (#24: +5) as does the confidence of knowing that repairs and problems will be fixed quickly (#6: +4) and they do not need to worry about maintenance issues (#5: +3). They also want to have an effective and efficient heating and hot water system (#16: +2) and for checks to be carried out on fire, electrical, gas, asbestos and water safety (#42: +2). They want their homes to be sited close to shops, amenities and transport (#4: +2) and to be kept clean and tidy (#40: +2) so the appearance of the Court gives a good impression (#7: +1).

Being treated with dignity and respect (#31: +5) is more important than having a court manager to turn to for help and advice (#1: +4). These residents want to live independently (#28: +3), to have the freedom to choose how to live their lives (#27: +4) and ability to have their say with senior management (#29: +3).

This perspective enjoys living around people of a similar age and outlook (#11: +3) and feel this creates a sense of friendship and community spirit (#23: +2) and so is not opposed to occupation being restricted to those aged over 65 who are retired (#12: 0).

### **RH Site J Perspective 2 – Supported, Social and Safe**

This perspective wants a court manager they can call upon for help and advice (#1: +6) and a pull-cord or pendant to summons help in an emergency (#21: +6). They want to be safe and secure (#17: +5) and looked after (#10: +3), but also live independently (#28: +5) in their own home with their own front door (#24: +3). They recognise to do that they need the support of good staff (#48: +4), but also the companionship of neighbours (#8: +3). Although they are not advocates of restricting occupation to people who are retired and aged over 65 (#12: -1) or living in close proximity (#37: -2) to others of a similar age and outlook (#11: 0) they recognise that this can create a sense of community and friendship (#23: +1). This perspective enjoys social events and activities they can join in (#19: +3) and hence wants to have a communal lounge (#9: +2) and be kept informed about what is going on (#43: +4).

As well as having social support this perspective wants to be kept safe with repairs and problems being fixed quickly (#6: +4), an effective and efficient heating system (#16: +2), wide doors for mobility (#45: +2) and checks of fire, electrical, gas, asbestos and water safety (#42: +2). This perspective does not welcome people living with dementia or who need to be looked after (#36: -2) but they are even less well disposed to residents with dogs, cats or other pets (#13: -5).

### **RH Site J Perspective 3 – Peace of Mind, Repairs and Personal Space**

This perspective wants to be able to summons help in an emergency (#21: +6) in order to feel safe and secure (#17: +6). They want peace of mind from being looked after (#10: +4) by a court manager who is available for help and advice (#1: +4) who does not live on-site (#2: -3) but who is definitely not only employed on a part-time basis (#3: -4).

Their sense of safety and security, however, seems to be primarily based on not needing to worry about maintenance and repairs (#5: +5) and repairs or problems being fixed quickly (#6: +3), having an effective and efficient heating and hot water system (#16: +4) and checks being carried out on fire, electrical, gas, asbestos and water safety (#42: +5)

They want to ensure they have their own home and front door (#24: +3) in order to enjoy independent living (#28: +2) with security of tenure (#14: +2). They want to be able to exercise choice and control (#30: +2) including the ability to have pets if they choose to do so (#13: +2). They want to live in modern and well-designed buildings (#39: +2) in a

nice area with attractive surroundings (#25: +1), that create a good impression (#7: +1) and are located close to shops amenities and transport (#4: +1).

Residents of this perspective definitely do not like living in close proximity to others in a compact community (#37: -6) and do not want to live around other older people of a similar age and outlook (#11: -5) to think it creates a sense of community spirit or friendship (#23: -1). They therefore do not appreciate the provision of a communal lounge (#9: -6) or want to have social events and activities to get involved in (#19: -1).

#### **Site J Perspective 4 – Dignity, Community Spirit and Standards**

Being treated with dignity and respect is the overriding concern of this perspective (#31: +6) and they also want to feel safe and secure (#17: +6). They appreciate having a court manager who is able to help and give advice if needed (#1: +5) and want the good and consistent service they provide (#48: +3). They do not want the manager to live on-site (#2: -3) and are not concerned about having a pull-cord or pendant to summons help (#21: 0), but they definitely do not think they should be part-time (#3: -4).

They want their own home with their own front door (#24: +5) as this combined with security of tenure (#14: +2) ensures they can live independently (#28: +4) with freedom of choice (#27: +3). The quality and standard of their home is also important. It needs to be near shops, amenities and transport (#4: +4), be in a nice area with attractive surroundings (#25: +2) and create a good impression (#7: +3) with modern and well-designed facilities (#39: +2). They do not want to worry about repairs and maintenance (#5: +3) and want the building and gardens kept clean and tidy (#40: +2).

Although they do not think that living with other older people is necessarily a positive thing (#11: -1) and do not consider that occupation should be restricted to those aged over 65 (#12: -3), they do not object to living in close proximity in a compact community (#37: +1) because of the community spirit and friendship it provides (#23: +4).

## Retirement Housing Site J Factor Arrays

No.	Statement	1	2	3	4
1	A court manager to turn to if you need help and advice	4	6	4	5
2	A resident manager or warden who lives on-site	-4	0	-3	-3
3	A court manager who is only employed on a part-time basis	-3	-6	-4	-4
4	Close to shops, amenities and transport	2	-3	1	4
5	No need to worry about maintenance and repairs	3	1	5	3
6	Repairs or problems are addressed and fixed quickly	4	4	3	1
7	The appearance of the Court creates a good impression	1	0	1	3
8	Companionship of neighbours so you are never lonely	0	3	0	1
9	Use of a communal lounge and other shared facilities	-2	2	-6	0
10	Peace of mind that comes from being looked after	-1	3	4	-1
11	Living around people of a similar age and outlook	3	0	-5	-1
12	Occupancy restricted to only retired people aged over 65	0	-1	-3	-3
13	Residents are able to have dogs, cats or other pets	-2	-5	2	2
14	Having security of tenure	6	1	2	2
15	A communal laundry room with washers and dryers	0	-1	1	1
16	An effective and efficient heating and hot water system	2	2	4	0
17	Feeling safe and secure	6	5	6	6
18	A garden or balcony so you can sit out in private	0	-2	0	1
19	Social events and activities to get involved in	-1	3	-1	-1
20	Availability of a good internet connection and/or wifi	1	-3	-1	1
21	Pull-cord or pendant to summon help in an emergency	-1	6	6	0
22	Sufficient car parking spaces	-1	-1	-1	-2
23	Community spirit and friendship with people of similar age and outlook	2	1	-1	4
24	You have your own home with your own front door	5	3	3	5
25	In a nice area with attractive surroundings	0	0	1	2
26	Being seen as form of care home	-6	-5	-2	-5
27	Freedom to live as you choose: no requirement to join in or conform	4	1	0	3
28	Independent living	3	5	2	4
29	Able to have your say and raise matters with senior management	3	0	-1	-3
30	Residents are engaged and able to exercise choice and control	1	-1	2	-1
31	Residents are treated with dignity and respect	5	2	1	6
32	Some other residents behave badly	-5	-6	-3	-6
33	Residents who take control and assume responsibility for organising things	-2	-1	-4	-4
34	People don't respect privacy or confidentiality	-6	-3	-2	-2
35	Gossip spreads quickly	-3	-4	-4	-6
36	Residents with dementia or who need to be looked after	-4	-2	3	-2
37	Living in close proximity to others in a compact community	-4	-2	-6	1
38	Small flats	-5	-4	-5	-5
39	Properties and facilities that are modern and well-designed	0	-2	2	2
40	Buildings and gardens are kept clean and tidy	2	1	0	2
41	Contemporary kitchens and bathrooms	-1	-2	-2	0
42	Checks on fire, electrical, gas, asbestos and water safety	2	2	5	-2
43	Everyone is kept informed and up to date about local plans and activities	1	4	-2	-1
44	Information about costs and charges is correct, clear and comprehensive	1	0	1	0
45	Wide doors, that are easy to open, for people with reduced mobility	-2	2	0	-1
46	A reliable lift	-1	1	0	-2
47	A suitable storage area for buggies and other large items	-3	-4	-3	-4
48	Good staff who provide consistency of service	1	4	3	3
49	Common lounge used by external organisations and groups	-3	-3	-2	-3
50	Guest room available for visitors	-2	-1	-1	0

# Retirement Housing Site K

## Correlation Matrix Between Sorts

	1	2	3	4	5	6	7	8	9	10	11	12	13
1 KRes1	100	48	61	53	44	31	37	64	43	62	51	23	34
2 KRes2	48	100	28	34	46	23	37	40	30	53	30	33	20
3 KRes3	61	28	100	59	56	57	3	52	34	38	36	4	31
4 KRes4	53	34	59	100	58	53	50	55	52	52	41	23	34
5 KRes5	44	46	56	58	100	45	35	47	64	45	38	30	40
6 KRes6	31	23	57	53	45	100	28	30	30	39	61	24	28
7 KRes7	37	37	3	50	35	28	100	48	45	59	33	41	30
8 KRes8	64	40	52	55	47	30	48	100	41	56	30	44	28
9 KRes9	43	30	34	52	64	30	45	41	100	52	47	37	45
10 KRes10	62	53	38	52	45	39	59	56	52	100	48	43	51
11 KRes11	51	30	36	41	38	61	33	30	47	48	100	39	31
12 KRes12	23	33	4	23	30	24	41	44	37	43	39	100	29
13 KRes13	34	20	31	34	40	28	30	28	45	51	31	29	100

### Two factors identified from the sorts of the 13 Retirement Housing resident participants at Site K.

Search for 7 Factors provides 59% explanation of variation. Significant loadings on only five out of seven Factors and one of these had just one defining sort.

Search for 5 Factors provides 55% explanation of variation. Significant loadings on four out of five Factors with one of these having just one defining sort.

Search for 4 Factors provides 53% explanation of variation with significant loadings on three out of four Factors.

Search for 3 Factors provides 47% explanation of variation with significant loadings on two of the three Factors.

Search for 2 Factors provides 47% explanation of variation with significant loadings on both Factors with five defining sorts each of the Factors so selected as basis for analysis.

<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>F6</b>	<b>F7</b>	<b>C</b>	<b>NS</b>
1, 2, 8	6, 11	-	7, 12	3	5, 9	-	10	4, 13
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>F5</b>	<b>C</b>	<b>NS</b>		
7, 11, 12	4, 5, 6, 9	-	3	1, 2, 8	10	13		
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>	<b>C</b>	<b>NS</b>			
7, 10, 11, 12	3, 4, 5, 6	-	1, 2, 8	-	9, 13			
<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>C</b>	<b>NS</b>				
1, 2, 7, 8, 10	3, 4, 5, 6, 9	-	-	11, 12, 13				
<b>F1</b>	<b>F2</b>	<b>C</b>	<b>NS</b>					
1, 2, 7, 8, 10	3, 4, 5, 6, 9	-	11, 12, 13					

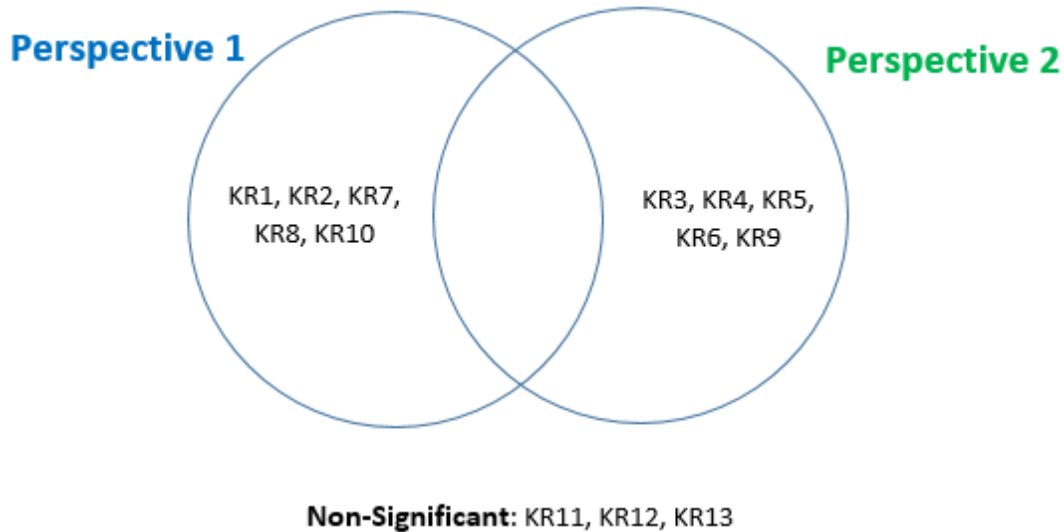
### Factor Matrix with an X Indicating a Defining Sort

QSORT	1	2
1 K Res1	0.5726X	0.4552
2 K Res2	0.5730X	0.1901
3 K Res3	0.1891	0.6637X
4 K Res4	0.4365	0.6217X
5 K Res5	0.3530	0.6765X
6 K Res6	0.1381	0.6952X
7 K Res7	0.6156X	0.1952
8 K Res8	0.6919X	0.2969
9 K Res9	0.4155	0.5550X
10 K Res10	0.7573X	0.3650
11 K Res11	0.3954	0.4981
12 K Res12	0.4828	0.1813
13 K Res13	0.3443	0.3850
% expl.Var.	24	23
Eigenvalues	3.12	2.99

### Correlations Between Factor Scores

	1	2
1	1.0000	0.6528
2	0.6528	1.0000

### Distribution of Retirement Housing Site K Sorts across Two Perspectives



### Site K Perspective 1 – Freedom, Tenure Security and Convenience

This perspective wants the freedom to live as they choose (#27: +6) in their own home (#24: +4) with the security of tenure (#14: +6). They want to feel safe and secure (#17: +4) and so also appreciate having the means to summons help in an emergency (#21: +5) and a court manager they can call upon for help and advice (#1: +4) employed on a full-time basis (#3: -4).

They want to be treated with dignity and respect (#31: +3) and to be able to have their say and raise matters with senior managers (#29: 0), but do not particularly want to exercise choice and control (#30: 0).

They do not support occupation being restricted to retired people aged over 65 (#12: -3). Although this perspective does not have a strong positive or negative view on the companionship of neighbours (#8: 0) or living around people of a similar age (#11: +1), they do not feel this creates a sense of community (#23: -1) and regard living in close proximity to others as a negative issue (#37: -3). They do not consider it desirable to have people living in the Court with dementia or who need care (#36: -4) and dislike being seen as being a form of care home (#26: -5). They are also opposed to residents having dogs, cats or other pets (#13: -3).

They want the convenience of being close to shops, amenities and transport (#4: +5) and are not concerned about car parking (#22: -2). They would appreciate the mobility of having a reliable lift (#46: +2) and wide doors that are easy to open (#45: +2), but do not see the need for a storage area for mobility scooters (#47: -2). They regard the communal laundry (#15: +1) as being more important than a communal lounge (#9: -1) and would be particularly concerned about having a flat that they thought was too small (#38: -4).

#### Site K Perspective 2 – Independent, Home and Gardens

This perspective values having the independence (#28: +6) of their own home (#24: +6) above all other considerations. But having a garden is also of particular importance (#18: +5) and is of far greater significance than having a communal lounge (#9: +2) or other shared facilities including a laundry (#15: -4), guest room (#50: 0) and storage areas for buggies or other large items (#47: -1). It is also important for the buildings and gardens to be kept clean and tidy (#40: +4) and for the appearance of the Court to give a good impression (#7: +4). They do not want to have worry about maintenance and repairs (#5: +1) even though time does not seem to be of the essence in fixing problems (#6: +1).

People with this perspective do not want to be looked after (#10: -3) and do not see a need for a pull-cord or pendant to summons help (#21: -1). They do not regard the availability of a court manager as a particular priority (#1: +1), but would prefer the court manager not to be just part-time (#3: -2). It is more important that they are treated with dignity and respect (#31: +4) and have the opportunity to have their say with senior managers if required (#29: +3) and freedom to live as they choose (#27: +3).

They do not consider being safe and secure or to be a high priority (#17: +2) and so do not appear particularly concerned about having security of tenure (#14: +1) or in ensuring safety checks are performed (#42: +1). They want an effective and efficient heating and hot water systems (#16: +3) but do not seem over concerned about whether the properties are modern or contemporary (#39: +2; #41: +1). They do not consider occupancy needs to be restricted only to old people who are retired and aged over 65 (#12: -2) and they do not feel they need the companionship of neighbours to combat loneliness (#8: -1). They do not welcome living in close proximity to other older people (#37: -1; #11: 0), they do recognise that this a community spirit can develop through

**association with people of a similar age and outlook (#23: +2). A major concern is that their accommodation should not be regarded as a form of care home (#26: -6) and they do not think people living with dementia or who need to be looked after should be living there (#36: -6).**

## Retirement Housing Site K Factor Arrays

No.	Statement	1	2
1	A court manager to turn to if you need help and advice	4	1
2	A resident manager or warden who lives on-site	-2	-1
3	A court manager who is only employed on a part-time basis	-4	-2
4	Close to shops, amenities and transport	5	1
5	No need to worry about maintenance and repairs	3	5
6	Repairs or problems are addressed and fixed quickly	1	1
7	The appearance of the Court creates a good impression	-2	4
8	Companionship of neighbours so you are never lonely	0	-1
9	Use of a communal lounge and other shared facilities	-1	-2
10	Peace of mind that comes from being looked after	2	-3
11	Living around people of a similar age and outlook	1	0
12	Occupancy restricted to only retired people aged over 65	-3	-2
13	Residents are able to have dogs, cats or other pets	-3	-2
14	Having security of tenure	6	1
15	A communal laundry room with washers and dryers	1	-4
16	An effective and efficient heating and hot water system	1	3
17	Feeling safe and secure	4	2
18	A garden or balcony so you can sit out in private	-1	5
19	Social events and activities to get involved in	-1	-3
20	Availability of a good internet connection and/or wifi	1	0
21	Pull-cord or pendant to summon help in an emergency	5	-1
22	Sufficient car parking spaces	-2	3
23	Community spirit and friendship with people of similar age and outlook	-1	2
24	You have your own home with your own front door	4	6
25	In a nice area with attractive surroundings	0	-1
26	Being seen as form of care home	-5	-6
27	Freedom to live as you choose: no requirement to join in or conform	6	3
28	Independent living	2	6
29	Able to have your say and raise matters with senior management	3	3
30	Residents are engaged and able to exercise choice and control	0	-2
31	Residents are treated with dignity and respect	3	4
32	Some other residents behave badly	-6	-5
33	Residents who take control and assume responsibility for organising things	-2	-3
34	People don't respect privacy or confidentiality	-5	-4
35	Gossip spreads quickly	-6	-5
36	Residents with dementia or who need to be looked after	-4	-6
37	Living in close proximity to others in a compact community	-3	-1
38	Small flats	-4	-3
39	Properties and facilities that are modern and well-designed	-1	2
40	Buildings and gardens are kept clean and tidy	0	4
41	Contemporary kitchens and bathrooms	0	1
42	Checks on fire, electrical, gas, asbestos and water safety	3	1
43	Everyone is kept informed and up to date about local plans and activities	-1	0
44	Information about costs and charges is correct, clear and comprehensive	1	2
45	Wide doors, that are easy to open, for people with reduced mobility	2	0
46	A reliable lift	2	0
47	A suitable storage area for buggies and other large items	-2	-1
48	Good staff who provide consistency of service	0	2
49	Common lounge used by external organisations and groups	-3	-4
50	Guest room available for visitors	2	0



## **Appendix 13**

### **Correlations between Retirement Housing Q Sorts**

*Array of the correlations between the individual Q sorts produced by each of the  
157 Retirement Housing participants (3 sheets).*

SORTS	>70 <30										B452																																						
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49
1 Ires2	100	44	38	63	28	41	16	44	62	6	52	60	44	55	45	53	49	43	54	37	56	61	12	34	35	17	49	32	43	63	34	33	30	52	41	31	39	24	37	42	44	66	32	40	55	45	62	47	42
2 Ires2	44	100	28	65	44	37	63	62	13	69	53	58	45	47	60	44	29	41	40	54	48	23	51	42	37	52	50	58	63	47	49	39	49	28	59	59	44	39	42	54	66	32	40	55	45	61	67	40	42
3 Ires2	28	65	100	44	37	63	62	13	69	53	58	45	47	60	44	29	41	40	54	48	23	51	42	37	52	50	58	63	47	49	39	49	28	59	59	44	39	42	54	66	32	40	55	45	61	67	40	42	
4 Ires4	63	28	65	100	44	37	63	62	13	69	53	58	45	47	60	44	29	41	40	54	48	23	51	42	37	52	50	58	63	47	49	39	49	28	59	59	44	39	42	54	66	32	40	55	45	61	67	40	42
5 Ires5	28	65	16	45	100	40	47	34	29	42	45	28	48	26	33	29	42	9	33	9	42	24	33	51	24	23	38	54	43	42	31	19	34	23	33	28	33	28	33	28	58	39	45	23	19	30	45	58	20
6 Ires6	41	44	23	40	100	53	45	49	18	54	62	55	44	46	29	44	47	48	69	31	39	55	41	43	32	33	47	50	55	30	41	64	32	33	64	26	49	44	56	40	57	35	61	47	32	64	19	34	
7 Ires7	16	37	54	57	100	39	60	62	18	57	64	59	46	42	43	47	46	52	61	56	36	41	47	38	46	49	46	69	49	45	58	48	42	46	66	33	56	78	53	61	46	52	32	55	60	62	59	34	
8 Ires8	49	39	63	59	49	33	62	100	42	22	56	59	53	50	55	40	42	39	53	38	59	41	43	36	33	39	40	50	28	60	43	50	28	20	59	48	43	39	43	42	48	28	44	38	54	37	40		
9 Ires10	6	12	34	35	17	49	32	43	63	34	33	30	52	41	31	39	24	37	42	44	66	32	40	55	45	62	47	42	46	32	40	55	45	61	67	40	42	54	66	32	40	55	45	61	67	40	42		
10 Ires10	6	12	34	35	17	49	32	43	63	34	33	30	52	41	31	39	24	37	42	44	66	32	40	55	45	62	47	42	46	32	40	55	45	61	67	40	42	54	66	32	40	55	45	61	67	40	42		
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12 Ires2	60	53	49	49	28	62	66	59	16	64	100	65	54	58	53	46	68	55	62	68	41	45	49	45	45	46	50	52	66	56	37	42	65	46	49	77	40	67	66	56	56	50	77	59	43	64	46		
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29 Ires9	43	48	33	28	30	21	46	50	36	37	52	48	47	54	35	35	45	43	30	43	30	34	52	64	30	44	100	52	47	37	45	41	31	47	47	33	58	54	33	37	48	34	28	36	49	34	61	45	
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31 Ires11	34	47	21	39	33	55	18	62	60	13	47	56	35	35	42	32	31	42	51	30	36	41	38	61	33	30	47	48	100	39	31	40	11	48	68	28	36	61	46	38	28	34	41	50	43	49	44		
32 Ires12	33	49	38	34	21	30	12	42	43	1	25	37	27	39	31	56	11	50	8	23	33	4	23	30	24	41	44	37	43	39	100	29	28	12	47	30	6	26	26	43	6	19	33	45	51	37			
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35 Ires2	41	28	30	23	32	51	30	20	22	10	46	44	49	17	29	57	48	38																															





## **Appendix 14**

### **Average Scores and Ranking of Statements for Extra Care and Retirement Housing**

*Details of the ranking of statements produced by participants for Extra Care and Retirement Housing based on average (mean) scores (calculated from sum of the scores from all participants divided by the number of participants). Also charts showing the distribution of scores for each statement from participants.*

## Statement Scores and Profiles

Q methodology looks holistically at the arrangement of the statements produced by participants in order to find patterns of perspective and clusters of subjectivity rather than atomistically at the range of responses to each statement. It is the arrays produced by the participants that are the variables under consideration not the population of statements. Finding the average scores for each statement from each of the Q sorts in order to put them in a rank order of priority and considering the range and distribution of responses is not therefore a part of Q methodology. This does though provide an initial indication of the relative priority and preference for different aspects of Retirement Housing and Extra Care as well as providing a basis for comparison of the responses to statements between residents of Extra Care and Retirement Housing.

These results can only be regarded as being indicative because the participants in the study are not necessarily representative of Housing 21's Extra Care and Retirement Housing residents. Despite broadly reflecting the demographic profile of the overall populations of people living in Housing 21's Extra Care and Retirement Housing properties, the participants only represent an opportunistic self-selected sample of residents from sites identified as locations for the study.

### Average Scores and Rankings

Calculating the average score for each statement means they can be ranked from the issues or aspects that are most liked or wanted to those that are most disliked and not wanted. By also calculating the standard deviation it provides an indication of how consistent the scores were across all participants and hence whether there was a consensus of opinion about the importance of an issue or there were different points of view.

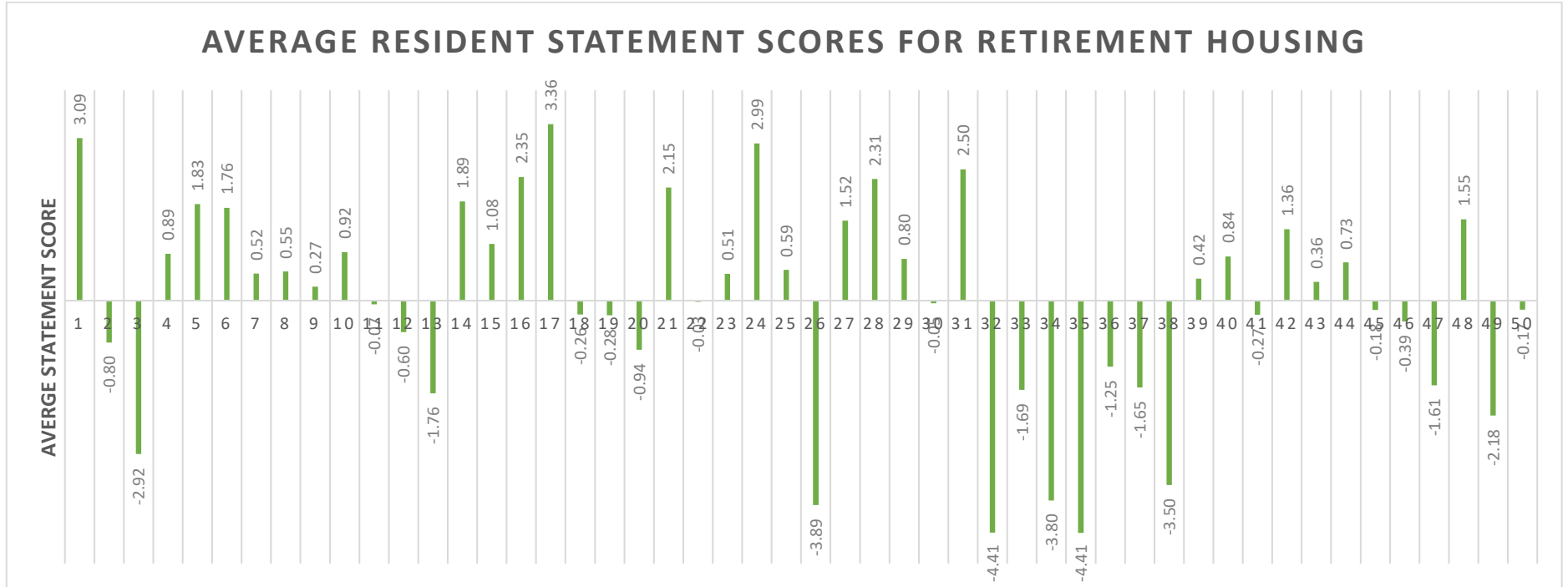
The nature of the sorting and scoring of statements on a scale from -6 to +6 means that not only is the net score for any participant's distribution zero but the average score across all statements is also zero. A further consequence of the quasi normal distribution of the sorting grid, that requires participants to make choices and determine what issues are of particular significance, is that there are only limited opportunities for statements to be positioned in the higher scoring positions (whether positive or negative).

The rankings of statements by resident participants for both Retirement Housing and Extra Care are shown in Tables A15.1 and A15.2 as well as in Charts A15.1 and A15.2.

**Table A14.1: Retirement Housing Statement Rankings and Standard Deviations**

No.	Statement	Average	Standard Deviation	Rank
17	Feeling safe and secure	3.3567	2.4260	1
1	A court manager to turn to if you need help and advice	3.0892	2.3793	2
24	You have your own home with your own front door	2.9873	2.4727	3
31	Residents are treated with dignity and respect	2.4968	2.2193	4
16	An effective and efficient heating and hot water system	2.3503	2.1351	5
28	Independent living	2.3121	2.5660	6
21	Pull-cord or pendant to summon help in an emergency	2.1529	2.4577	7
14	Having security of tenure	1.8854	2.7761	8
5	No need to worry about maintenance and repairs	1.8344	2.1588	9
6	Repairs or problems are addressed and fixed quickly	1.7643	2.1300	10
48	Good staff who provide consistency of service	1.5478	2.2359	11
27	Freedom to live as you choose: no requirement to join in or conform	1.5223	2.5024	12
42	Checks on fire, electrical, gas, asbestos and water safety	1.3567	2.3214	13
15	A communal laundry room with washers and dryers	1.0764	2.4037	14
10	Peace of mind that comes from being looked after	0.9236	2.5825	15
4	Close to shops, amenities and transport	0.8917	2.6984	16
40	Buildings and gardens are kept clean and tidy	0.8408	1.7721	17
29	Able to have your say and raise matters with senior management	0.7962	2.2594	18
44	Information about costs and charges is correct, clear and comprehensive	0.7261	2.1164	19
25	In a nice area with attractive surroundings	0.5860	1.9745	20
8	Companionship of neighbours so you are never lonely	0.5541	2.5197	21
7	The appearance of the Court creates a good impression	0.5159	1.7361	22
23	Community spirit and friendship with people of similar age and outlook	0.5096	2.2731	23
39	Properties and facilities that are modern and well designed	0.4204	2.0569	24
43	Everyone is kept informed and up to date about local plans and activities	0.3567	2.3048	25
9	Use of a communal lounge and other shared facilities	0.2675	2.1604	26
22	Sufficient car parking spaces	-0.0255	2.9539	27
30	Residents are engaged and able to exercise choice and control	-0.0510	1.9930	28
11	Living around people of a similar age and outlook	-0.0701	2.3189	29
50	Guest room available for visitors	-0.1720	2.3437	30
45	Wide doors, that are easy to open, for people with reduced mobility	-0.1783	2.1929	31
18	A garden or balcony so you can sit out in private	-0.2611	2.4962	32
41	Contemporary kitchens and bathrooms	-0.2675	2.1217	33
19	Social events and activities to get involved in	-0.2803	2.4203	34
46	A reliable lift	-0.3949	2.7664	35
12	Occupancy restricted to only retired people aged over 65	-0.5987	3.0324	36
2	A resident manager or warden who lives on-site	-0.7962	3.3439	37
20	Availability of a good internet connection and/or wifi	-0.9363	2.8857	38
36	Residents with dementia or who need to be looked after	-1.2548	2.9408	39
47	A suitable storage area for buggies and other large items	-1.6115	2.3531	40
37	Living in close proximity to others in a compact community	-1.6497	2.1969	41
33	Residents who take control and assume responsibility for organising things	-1.6943	2.2365	42
13	Residents are able to have dogs, cats or other pets	-1.7643	3.1077	43
49	Common lounge used by external organisations and groups	-2.1847	2.1320	44
3	A court manager who is only employed on a part-time basis	-2.9172	2.4101	45
38	Small flats	-3.5032	1.7975	46
34	People don't respect privacy or confidentiality	-3.8025	1.8935	47
26	Being seen as a form of care home	-3.8854	1.9839	48
32	Some other residents behave badly	-4.4076	1.8986	49
35	Gossip spreads quickly	-4.4140	1.5270	50

Chart A14.1: Retirement Housing Statement Scores

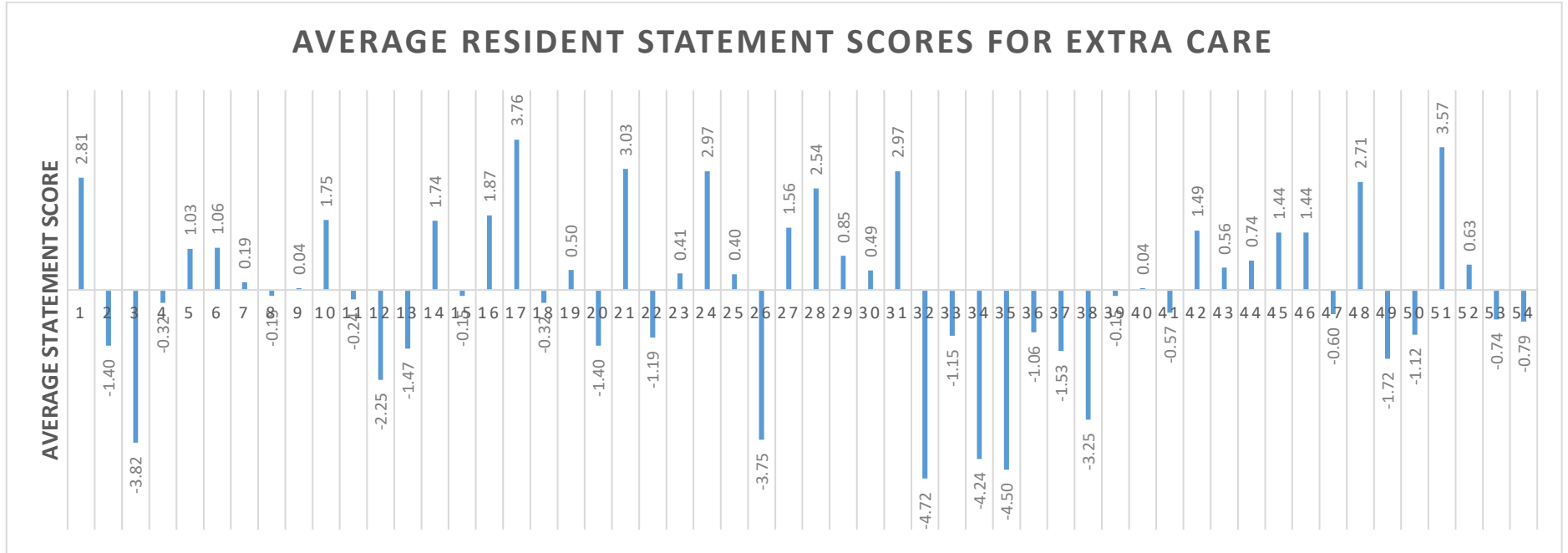




**Table A14.2: Extra Care Statement Rankings and Standard Deviations**

No.	Statement	Average	Standard Deviation	Rank
17	Feeling safe and secure	3.7647	2.2630	1
51	Care staff on-site 24 hours 7 days a week if needed (EC)	3.5735	2.3409	2
21	Pull-cord or pendant to summon help in an emergency	3.0294	2.3324	3
31	Residents are treated with dignity and respect	2.9706	1.6801	=4
24	You have your own home with your own front door	2.9706	2.2750	=4
1	A court manager to turn to if you need help and advice	2.8088	2.5220	6
48	Good staff who provide consistency of service	2.7059	2.1217	7
28	Independent living	2.5441	2.7248	8
16	An effective and efficient heating and hot water system	1.8676	1.7732	9
10	Peace of mind that comes from being looked after	1.7500	2.0960	10
14	Having security of tenure	1.7353	2.6492	11
27	Freedom to live as you choose: no requirement to join in or conform	1.5588	2.4277	12
42	Checks on fire, electrical, gas, asbestos and water safety	1.4853	1.9815	13
46	A reliable lift	1.4412	2.5286	=14
45	Wide doors, that are easy to open, for people with reduced mobility	1.4412	2.1583	=14
6	Repairs or problems are addressed and fixed quickly	1.0588	2.0643	16
5	No need to worry about maintenance and repairs	1.0294	2.0791	17
29	Able to have your say and raise matters with senior management	0.8529	1.8807	18
44	Information about costs and charges is correct, clear and comprehensive	0.7353	1.8991	19
52	An on-site restaurant (EC)	0.6324	2.0285	20
43	Everyone is kept informed and up to date about local plans and activities	0.5588	2.0678	21
19	Social events and activities to get involved in	0.5000	2.0037	22
30	Residents are engaged and able to exercise choice and control	0.4853	2.2719	23
23	Community spirit and friendship with people of similar age and outlook	0.4118	1.8169	24
25	In a nice area with attractive surroundings	0.3971	2.0590	25
7	The appearance of the Court creates a good impression	0.1912	1.4778	26
9	Use of a communal lounge and other shared facilities	0.0441	1.9131	=27
40	Buildings and gardens are kept clean and tidy	0.0441	1.3978	=27
39	Properties and facilities that are modern and well designed	-0.1471	1.4579	=29
15	A communal laundry room with washers and dryers	-0.1471	2.3090	=29
8	Companionship of neighbours so you are never lonely	-0.1471	1.8412	=29
11	Living around people of a similar age and outlook	-0.2353	1.9861	32
4	Close to shops, amenities and transport	-0.3235	2.0754	=33
18	A garden or balcony so you can sit out in private	-0.3235	2.0611	=33
41	Contemporary kitchens and bathrooms	-0.5735	2.1304	35
47	A suitable storage area for buggies and other large items	-0.6029	1.9863	36
53	Hairdressing salon on-site (EC)	-0.7353	2.1937	37
54	An accessible bath for those that want or need it (EC)	-0.7941	2.3736	38
36	Residents with dementia or who need to be looked after	-1.0588	2.3319	39
50	Guest room available for visitors	-1.1176	1.8273	40
33	Residents who take control and assume responsibility for organising things	-1.1471	2.5045	41
22	Sufficient car parking spaces	-1.1912	2.2768	42
2	A resident manager or warden who lives on-site	-1.3971	2.6298	=43
20	Availability of a good internet connection and/or wifi	-1.3971	2.7124	=43
13	Residents are able to have dogs, cats or other pets	-1.4706	2.7625	45
37	Living in close proximity to others in a compact community	-1.5294	1.8824	46
49	Common lounge used by external organisations and groups	-1.7206	1.9767	47
12	Occupancy restricted to only retired people aged over 65	-2.2500	2.2054	48
38	Small flats	-3.2500	1.8738	49
26	Being seen as a form of care home	-3.7500	2.2121	50
3	A court manager who is only employed on a part-time basis	-3.8235	1.7316	51
34	People don't respect privacy or confidentiality	-4.2353	2.1082	52
35	Gossip spreads quickly	-4.5000	1.5482	53
32	Some other residents behave badly	-4.7206	1.5420	54

Chart A14.2: Extra Care Statement Scores



## Statement Profiles

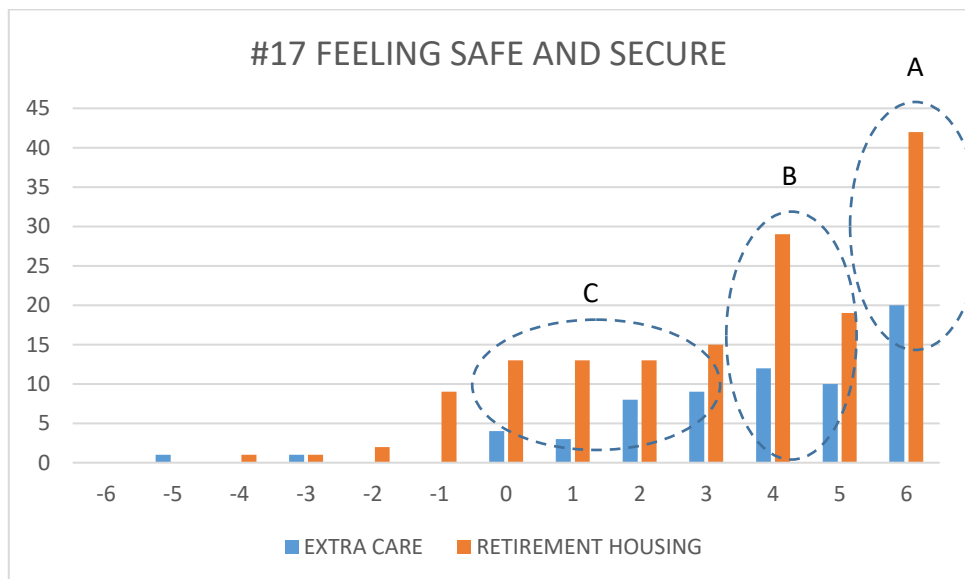
The range and patterns of responses to each statement may also provide an indication of patterns of opinion about an issue.

### #17. Feeling safe and secure

**+3.36 (1:50) Retirement Housing, +3.76 (1:54) Extra Care**

This the highest ranked statement by residents of both Retirement Housing and Extra Care indicating that overall this is what residents say they want the most. Perceptions of this are overwhelmingly positive with just 2 Extra Care and 13 Retirement Housing participants giving it a negative score.

For 20 out of 68 (29%) of Extra Care participants and 42 out of 157 (27%) of Retirement Housing participants this is scored as +6 and is their most important consideration (A on graph). For another group (22 (32%) Extra Care participants and 48 (31%) Retirement Housing participants) whilst this is still a priority it is perhaps a secondary concern so scored as +5 or +4 (B on graph). There is then a third group (24 (35%) of Extra Care participants and 54 (34%) of Retirement Housing participants) for whom this is not negative issue but it is not of particular importance and hence it is scored between 0 and +3 (C on graph).

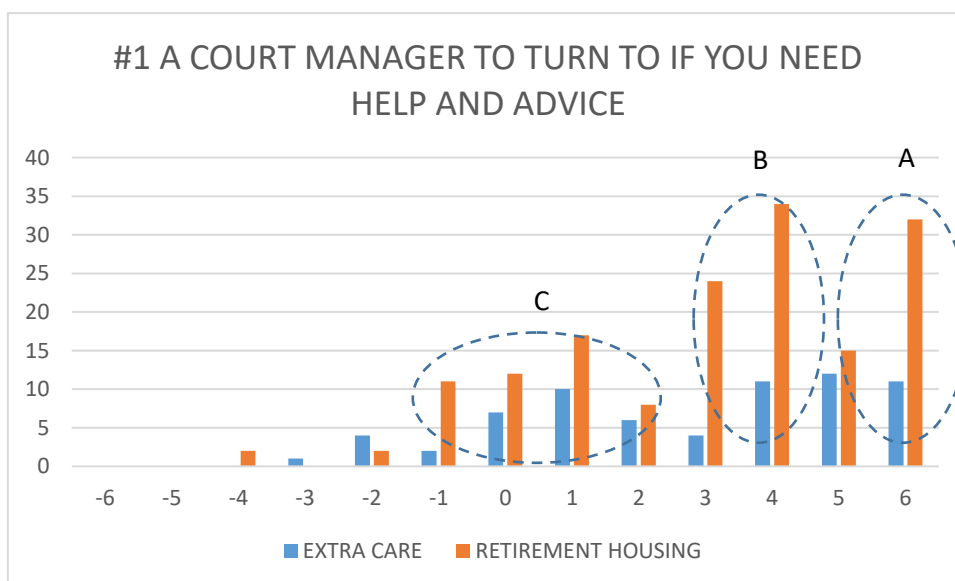


- #1. **A court manager to turn to if you need help and advice**  
+3.09 (2:50) Retirement Housing, +2.81 (6:54) Extra Care
- #51. **Care staff on-site 24 hours 7 days a week if needed**  
+3.57 (2:54) Extra Care

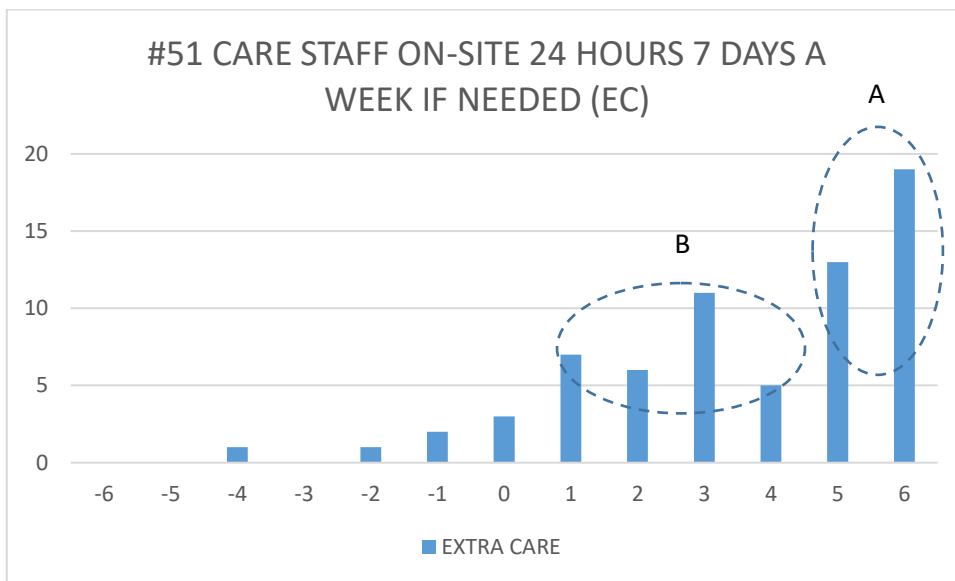
Statement #1 (A court manager to turn to if you need help and advice) is the second highest ranked statement for Retirement Housing participants and the sixth highest ranked statement for residents of Extra Care. For Extra Care the second highest ranked statement is #51 (Care staff on-site 24 hours 7 days a week if needed). The high ranking of these statements indicate that there is a commonality in assessment of the importance of service and support issues across Extra Care and Retirement Housing, but the different ranking for Statement #1 is perhaps reflects the difference in the character of the two services. Because there is no on-site care in Retirement Housing the court manager is the person that residents turn to for their primary source of support, whereas in Extra Care, for those in receipt of care services, it is the care staff rather than the court manager who act as the primary source of support.

There appear to be three potential sets of perspective on the Statement #1 amongst Retirement Housing participants: those that consider this to be top priority and scored it as +6 or +5 (47 (30%) out of 157) (A on graph); those that see it as a secondary priority and scored this as +4 or +3 (58 (37%)) (B on graph); and those who do not regard the availability of a court manager as a relatively low priority and score this as +2 or lower (52 (33%)) (C on graph).

For Extra Care half of the participants (34 out of 68) scored Statement #1 as +4 or above (11 or +6, 12 or +5 and 11 for +4) and the half had scores in the range between -3 and +3 with +1 as the mode and median position. This indicates there is perhaps a distinction within Extra Care between residents who actively appreciate the help and advice of a manager and those for whom this is of a lower significance, whether because they look to the care service for this assistance or they do not consider it is important.



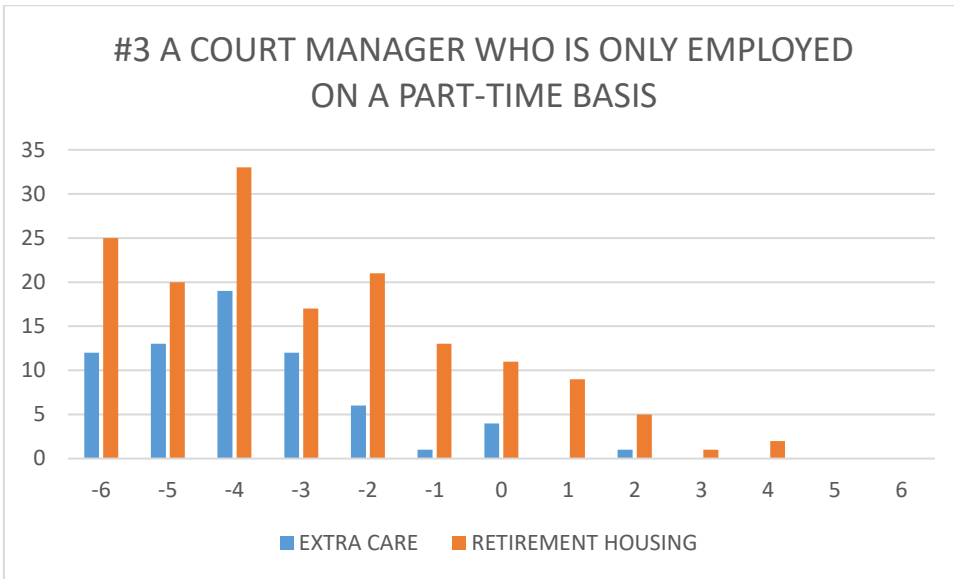
32 out of 68 (47%) Extra Care participants scored Statement #51 as +6 or +5 (A on graph) with a similar number (29 (43%)) scoring this between +1 and +4 (B on graph). This may reflect a distinction between those people who depend upon care support and those that do not. It does not, however, appear that there is also necessarily a simple connection or relationship between these two putative groupings of Extra Care participants and the scores they gave for Statement #1. 18 of the 34 participants who scored Statement #1 at +4 or above also scored Statement #51 as +6 or +5, but so did 14 of the 34 participants who scored Statement #1 as +3 or lower.



- #3. **A court manager who is only employed on a part-time basis**  
**-2.92 Retirement Housing (45:50), -3.82 Extra Care (51:54)**
- #2. **A resident manager or warden who lives on-site**  
**-0.80 Retirement Housing (37:50), -1.40 Extra Care (=43:54)**
- #48. **Good staff who provide consistency of service**  
**+1.55 Retirement Housing (11:50), +2.71 Extra Care (7:54)**

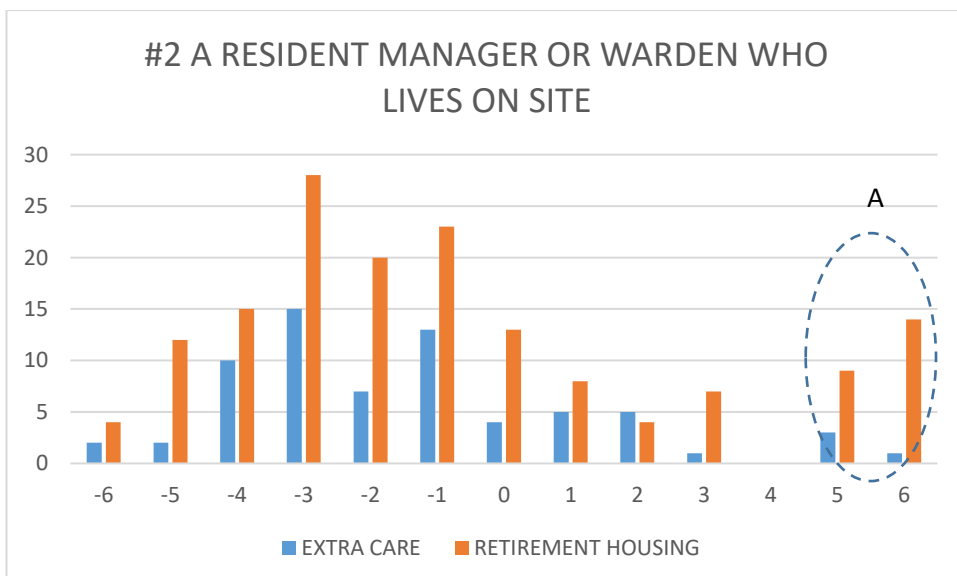
The position of these statements indicates the significance that participants appear to attach to the nature and extent of their relationship with the person they look to for help and support.

Statement #3 (A court manager who is only employed on a part-time basis) is the fourth most negative statement for residents of Extra Care and sixth most negative for participants from Retirement Housing. Even though the court manager role may not be seen to be of paramount importance for Extra Care its residents do appear to nevertheless appear consistent in their disapproval of their presence and availability only being on a part-time basis and hence this statement has the seventh lowest standard deviation (1.73) for Extra Care.



Preference for a court manager does not, however, necessarily indicate that they expect or even want the court manager to live amongst them and statement #2 (A resident manager or warden who lives on site) also received a generally negative response. 53 out of 68 (78%) Extra Care residents scored this as 0 or negative as did 115 out of 157 (73%) Retirement Housing Residents. This negative view was not universal and for Retirement Housing in particular there is a cohort of 24 out of 157 (15%) participants who scored this as either +6 or +5 (A on graph) indicating that having an on-site would be a top priority for them. It is worth noting that 11 of these 24 (i.e. 46%) were from the two Retirement Housing sites that do have a court manager that lives on-site.

As a consequence of the divergence of views, Statement #2 has the highest standard deviation (3.34) for Retirement Housing.



The importance attributed to the court manager or care staff is also reflected in the priority given to statement #48 (Good staff who provide consistency of service) which is ranked as the seventh most positive by residents of Extra Care and eleventh by participants from Retirement Housing. Consistency may be of greater importance for Extra Care because of both the greater intimacy involved in care or because of a concern about the generally higher rate of staff turnover for care staff than court managers.



**#21. Pull-cord or pendant to summon help in an emergency**  
**+2.15 Retirement Housing (7:50), +3.03 Extra Care (3:54)**

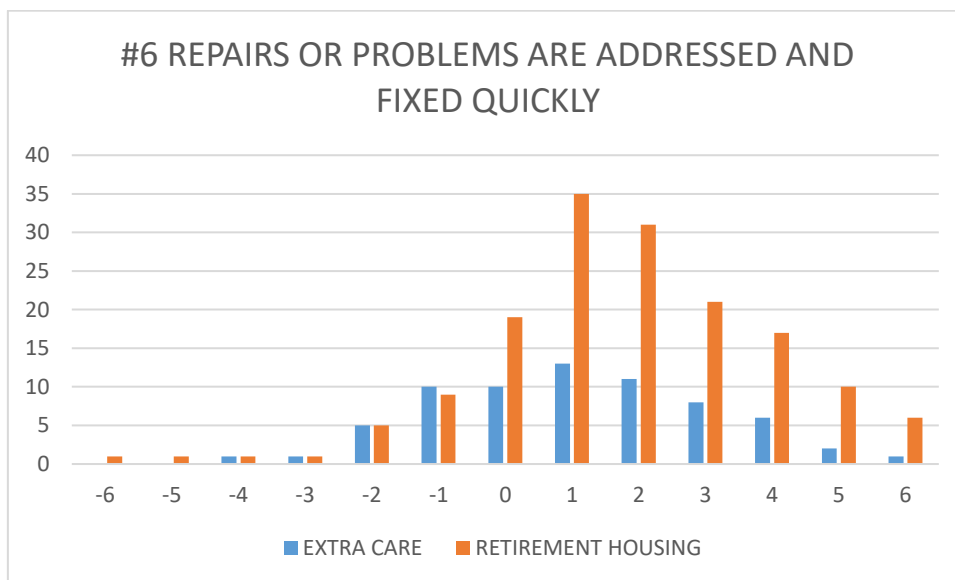
Statement #21 is the third highest priority for Extra Care with 29 out of 68 (43%) participants scoring this as +4 or higher, but for Retirement Housing this is the seventh ranked priority with 50 out of 157 (32%) residents scoring this as +4 or higher.

It might have been anticipated that having a pull-cord or pendant to summon help in an emergency would be a higher a priority for participants from Retirement Housing, where there is not care and cover on-site 24 hours 7 days a week, than for Extra Care where such services are available, but this does not appear to be the case. In Extra Care the pull-cord or pendant is often used by residents in receipt of care to make contact with the on-site care teams so this may in part be linked to the two group suggested for Statement #51 based on their degree of preference for having care staff on-site 24 hours 7 days a week. 8 of the 14 (57%) of the Extra Care residents who scored this statement (#21) as +6 also scored Statement #51 as either +6 or +5. An alternative, or additional, explanation may be that more residents of Retirement Housing consider themselves unlikely to require emergency assistance or that there may be alternative or better ways to summons help if an emergency did occur. There are more participants from Retirement Housing who scored statement #21 as 0 or negative (38 (24%)) (A on graph) than as +6 or +5 (35 (22%)) (B on graph).

- #5. **No need to worry about maintenance and repairs**  
**+1.83 Retirement Housing (9:50), +1.03 Extra Care (17:54)**
- #6. **Repairs or problems are addressed and fixed quickly**  
**+1.76 Retirement Housing (10:50), +1.06 Extra Care (16:54)**

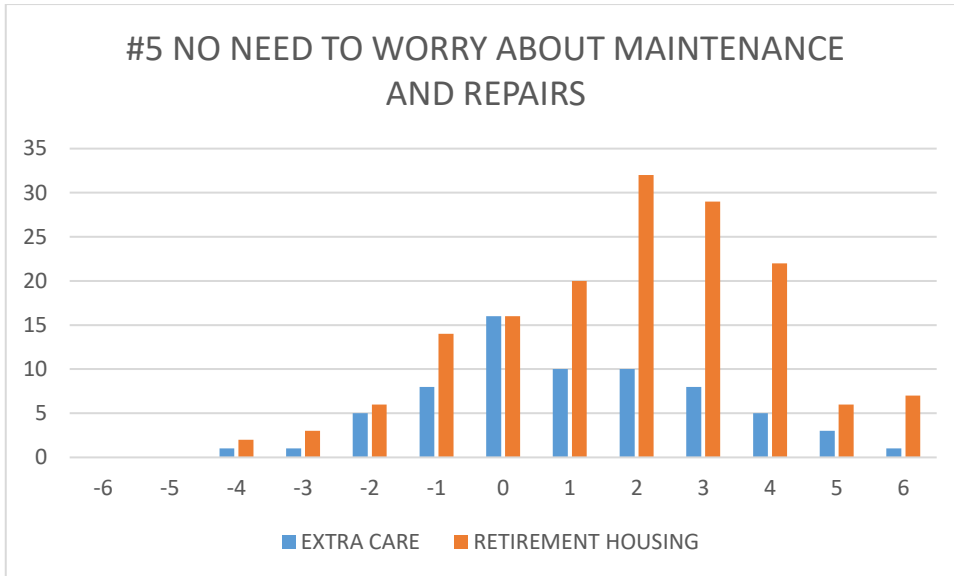
These statements may appear to be synonymous, and appear next to one another in the rankings for both Retirement Housing and Extra Care, but there is a distinction with the emphasis of Statement #5 on avoiding worry and having repairs taken care of, whilst Statement #6 is more focused on the speed and promptness with which matters are addressed.

There appears to be a comparability in the degrees of urgency expressed to get repairs or problems addressed and fixed quickly (Statement #6) across participants from Extra Care and Retirement Housing. Although the average (mean) score is higher for Retirement Housing (+1.76) than Extra Care (+1.06) the most common (mode) score is the same for both (+1).

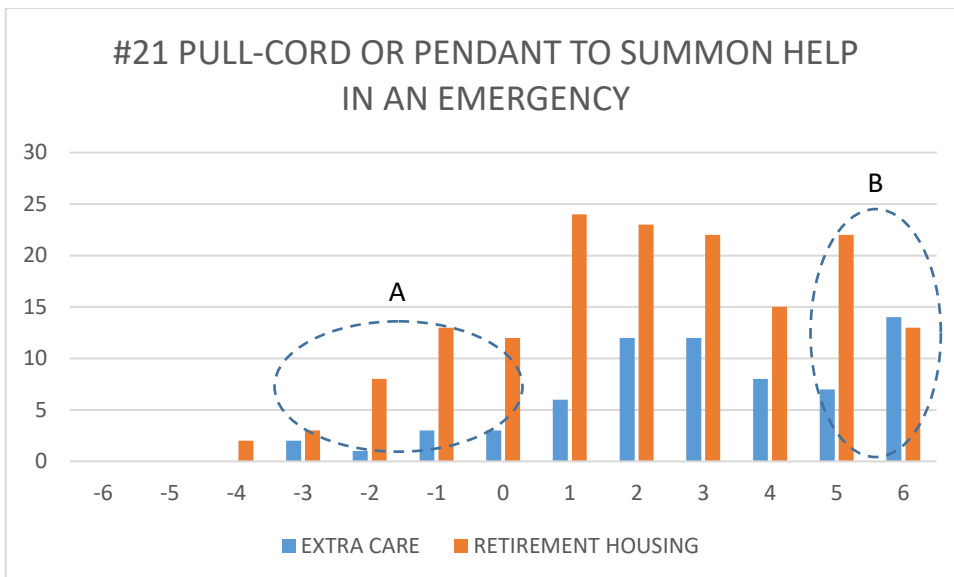


For Statement #5 (No need to worry about maintenance and repairs), even though the difference in the average score for Retirement Housing (+1.83) and Extra Care (+1.03) is only 0.1 more than the difference for Statement #6 there appears to be a more significant difference in the profile of the results. The most common (mode) score for #5 for Retirement Housing is +2 but is 0 for Extra Care. For Retirement Housing 96 out of 157 (61%) participants gave Statement #5 a score of +2 or more, whereas for Extra Care only 27 out of 68 (40%) participants score this statement at +2 or more.



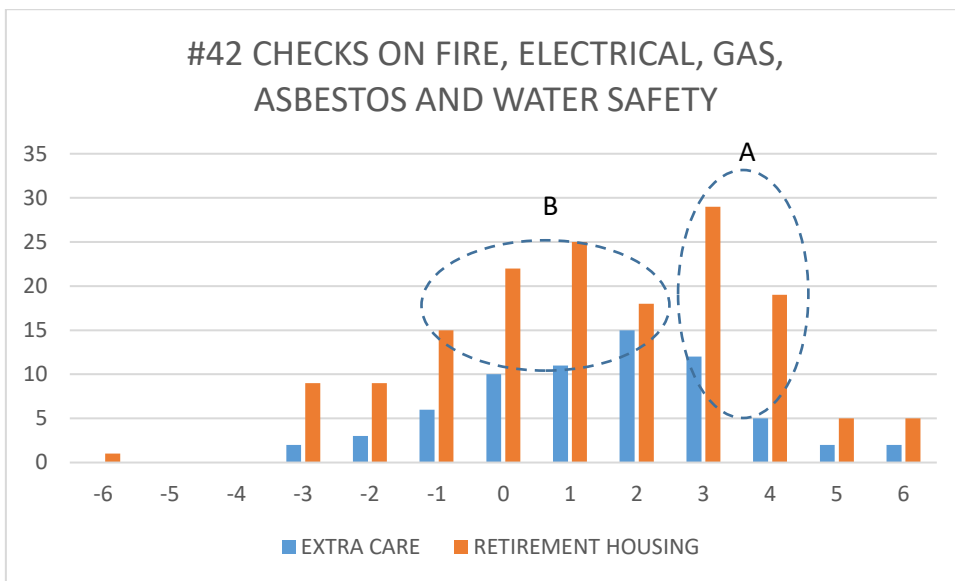


One potential explanation of these differences could be that residents of Retirement Housing are more likely to have moved because of concerns about their ability to maintain their previous property whereas for Extra Care moves are more likely to have been due to care than property factors. But the patterns of preference for problems being fixed promptly are less likely to be influenced by these difference in motivation.



**#42. Checks on fire, electrical, gas, asbestos and water safety**  
**+1.36 Retirement Housing (13:50), +1.49 Extra Care (13:54)**

Having checks on fire, electrical, gas, asbestos and water safety (Statement #42) does not appear to be directly linked to or to be as important as the principal concern of participants to feel safe and secure (#17). Only a small proportion of participants (10 out of 157 for Retirement Housing and 4 out of 68 for Extra Care) scored this as +6 or +5 indicating it was a top priority. More participants (48 out of 157 (31%) for Retirement Housing and 16 out of 68 (24%) for Extra Care) did score this as +4 or +3 (A on graph) indicating it was an important issue but perhaps of secondary importance. Although the most frequent score for Retirement Housing participants was +3, more than half of participants (80 out of 157) from Retirement Housing who scored this statement in the range -1 to +2 (B on graph). This suggests that for most residents safety checks are neither negative nor considered to be unnecessary, but they are not of particular interest or significance so seen as merely a hygiene factor that is taken for granted.



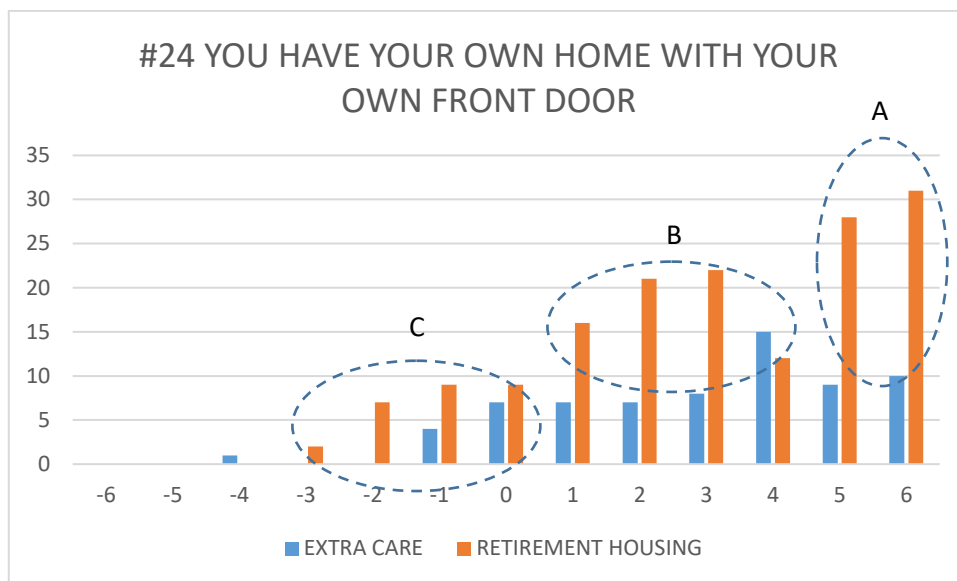
**#24. You have your own home with your own front door**  
**+2.99 Retirement Housing (3:50), +2.97 Extra Care (=4:54)**

**#14. Having Security of Tenure**  
**+1.89 Retirement Housing (8:50), +1.74 Extra Care (11:54)**

Statement #24 (You have your own home with your own front door) is the third highest ranked statement for Retirement Housing and ranked joint fourth by Extra Care residents. Having your own home and not living in an institutional setting is a fundamental part of the housing offer for both Retirement Housing and Extra Care.

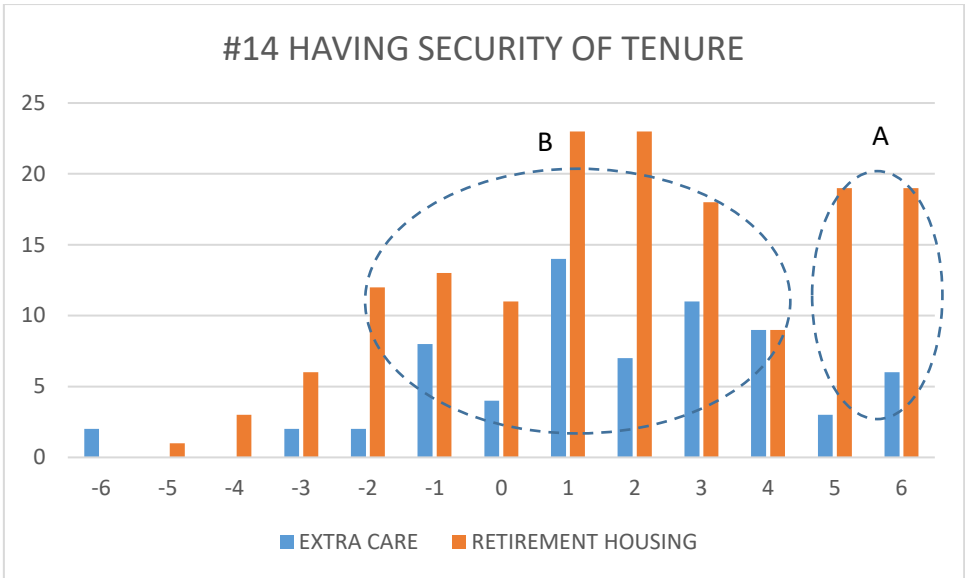
For Retirement Housing 59 out of 157 (38%) participants this is scored as either +5 or +6 (A on graph). The majority of Retirement Housing participants (84 (54%)) scored this between +1 and +4 indicating having their own home with its own front door was important but not their primary concern (B on graph), but there is also a minority of 38 (24%) that scored this as 0 or negative +1 suggesting this was not regarded as a relevant consideration (C on graph).

Unlike Retirement Housing which has a peak in in people scoring Statement #24 at +6 and +5, the most frequent score for Extra Care is +4 (15 out of 68 (22%) participants).



Statement #14 (Having security of tenure) is also closely associated with having your own home. This is the eighth highest ranked statement for Retirement Housing and ranked eleventh for Extra Care.

The distribution of scores for #14 by Retirement Housing shows 38 out of 157 (24%) see this to be an issue of primary importance and have scored this at either +6 or +5, but the distribution of scores for the remaining 119 (76%) of Retirement Housing is more like a normal distribution with +1 and +2 being the most frequent scoring positions, both with 23 participants. For Extra Care there are multiple peaks in the distribution of scores for Statement #14 suggesting this is not necessarily a simple issue to interpret.



**#31. Residents are treated with dignity and respect**  
**+2.50 Retirement Housing (4:50), +2.97 Extra Care (=4:54)**

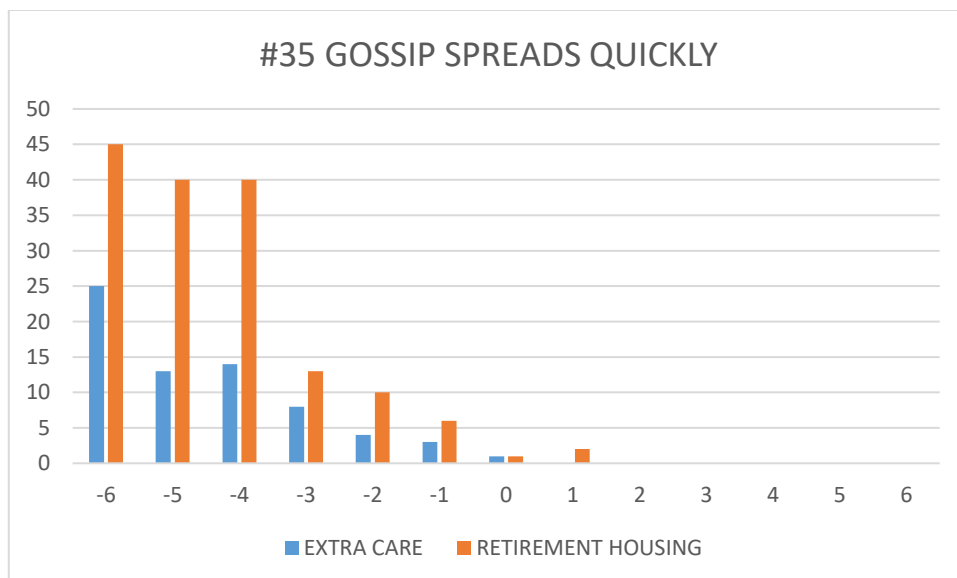
#31 (Residents are treated with dignity and respect) is ranked fourth by residents of Retirement Housing and joint fourth by residents of Extra Care. There are no Extra Care participants and only 16 out of 157 (10%) Retirement Housing participants who regard this as a negative issue, but it is also not an issue that is scored particularly highly, with only 31 out of 157 (20%) participants from Retirement Housing and 10 out of 68 (15%) of residents from Extra Care scoring it as +5 or +6. For Extra Care this statement has the sixth lowest standard deviation (1.68). This suggests whilst being treated with dignity and respect may be regarded as an important pre-requisite it is not an issue that is particularly controversial or likely to help to be distinctive of one particular perspective but not others.



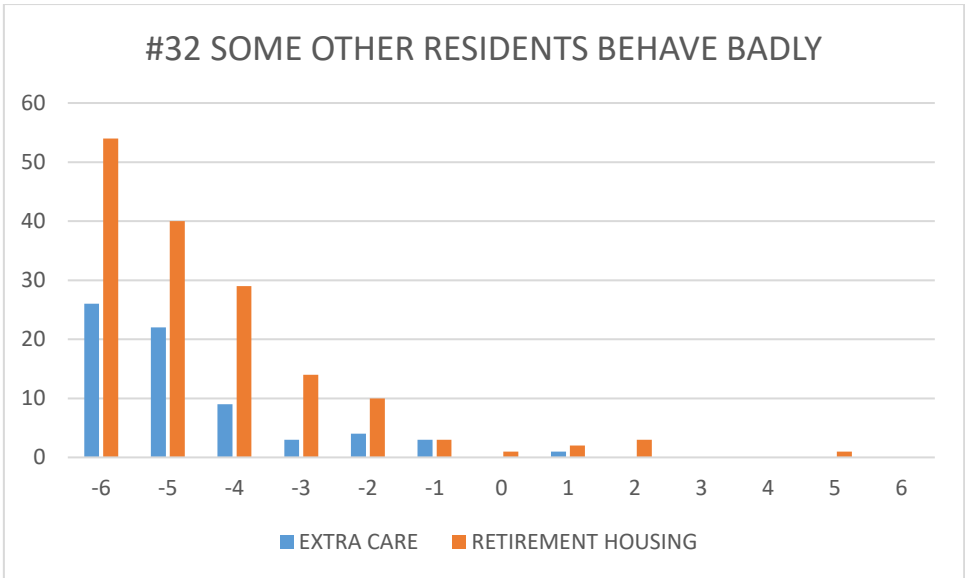
- #35. **Gossip spreads quickly**  
 -4.41 Retirement Housing (50:50), -4.50 Extra Care (53:54)
- #32. **Some other residents behave badly**  
 -4.41 Retirement Housing (49:50), -4.72 Extra Care (54:54)
- #34. **People don't respect privacy or confidentiality**  
 -4.24 Retirement Housing (47:50), -3.80 Extra Care (52:54)

These three statements are aspects of Retirement Housing and Extra Care that residents most dislike and do not want. The set of statements included relatively few that were inherently negative in character so it was perhaps inevitable that these statements would receive negative scores from almost all participants whereas there were many more options and choices for participants in picking their most positive statements.

Statement #35 (Gossip spreads quickly) was the lowest ranked statement by Retirement Housing participants and second lowest for Extra Care participants. For Retirement Housing 125 out of 157 (80%) participants scored this as -4 or lower and only 3 participants appeared to not mind this and scored this as 0 or +1. As a consequence this statement has the lowest standard deviation (1.53) for Retirement Housing. No Extra Care participants gave this a positive score and 25 out of 68 (37%) participants scored this as -6, but 16 out of 68 (24%) participants did score this as more than -4 making it only the second lowest ranked statement for Extra Care.



Statement #32 (Some other residents behave badly) was the lowest ranked statement for Extra Care participants and second lowest by Retirement Housing participants. For Extra Care 48 out of 68 (71%) participants scored this as either -6 or -5. Although there was one Extra Care participant who gave this statement a score of +1 it was still had the lowest standard deviation (1.54) for Extra Care. For Retirement Housing 94 out of 157 (60%) participants scored this as either -6 or -5, but there were also 6 Retirement Housing participants who gave this a positive score including one score of +5.



Statement #34 (People don't respect privacy or confidentiality) could be seen as being similar to concerns about gossip (#35) it did not attract quite as negative score. This might be because gossip is regarded as involving an element of malice or mischief, whereas loss of privacy might simply be an inadvertent or unavoidable consequence of the situation or setting.

For Retirement Housing this is the fourth lowest ranked statement but for Extra Care it is the third lowest. More Retirement Housing participants (36) scored this as -4 than any other score indicating that for a considerable number of participants it was not necessarily regarded as the absolutely worst thing, whereas for Extra Care participants the modal score was -6.



**#38. Small flats**

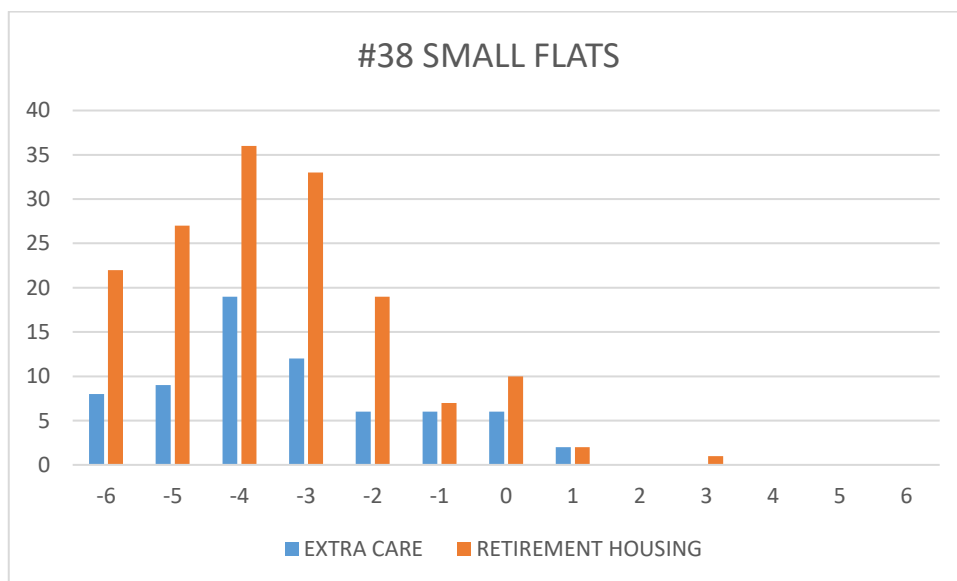
**-3.50 Retirement Housing (46:50), -3.25 Extra Care (49:54)**

**#26. Being seen as a form of care home**

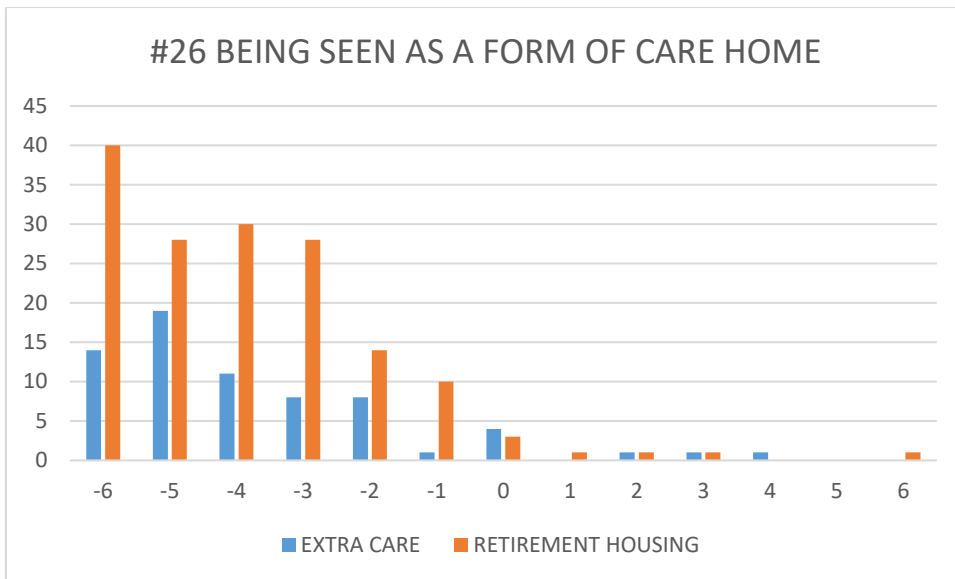
**-4.41 Retirement Housing (48:50), -3.75 Extra Care (50:54)**

These statements are also seen as being inherently negative and are things participants most dislike and do not want. Although both are negative it is interesting to note that Statement #38 (Small flats) is slightly less negative than Statement #26 (Being seen as a form of care home), which emphasises the strength of the aversion to the institutionalisation, stigma and negative perception of care homes.

Very few participants saw small flats as being a positive feature of either Retirement Housing or Extra Care suggesting that the notion that older people want small properties needs to be treated with some caution and not taken too far. The most frequent score for Statement #38 by participants from both Retirement Housing and Extra Care was -4 indicating that although a small flat may not be desirable it would not necessarily be considered the worst thing and might possibly be a compromise that they were willing to contemplate.



For a quarter (40 out of 157 (25%)) of Retirement Housing participants being seen as a form of care home was scored as -6 indicating it was considered to be something they most disliked and did not want. For Extra Care participants the most frequent score was -5 indicating that it was not necessarily the most negative issue, but only 7 (10%) Extra Care participants scored this as 0 or as a positive. Despite the importance of care for many of the participants in Extra Care settings, as suggested by the positive responses to Statement #51, there is therefore clearly a resistance to being seen as a form of care home.



**#28. Independent living**

**+2.31 Retirement Housing (6:50), +2.54 Extra Care (8:54)**

**#27. Freedom to live as you choose: no requirement to join in or conform**

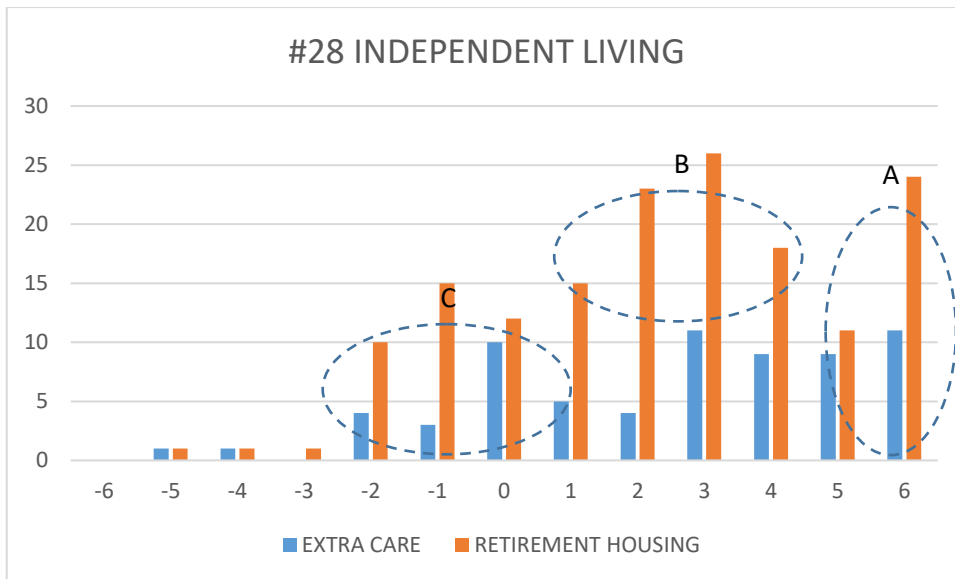
**+1.52 Retirement Housing (12:50), +1.56 Extra Care (12:54)**

One of the reasons that is often given to explain why care homes are not liked is because of the loss of independence that is inherent in living in an institutional setting. It is not surprising therefore that Statement #28 (Independent living) and Statement #27 (Freedom to live as you choose: no requirement to join in or conform) are both in the top quartile of statements for participants from Retirement Housing and Extra Care.

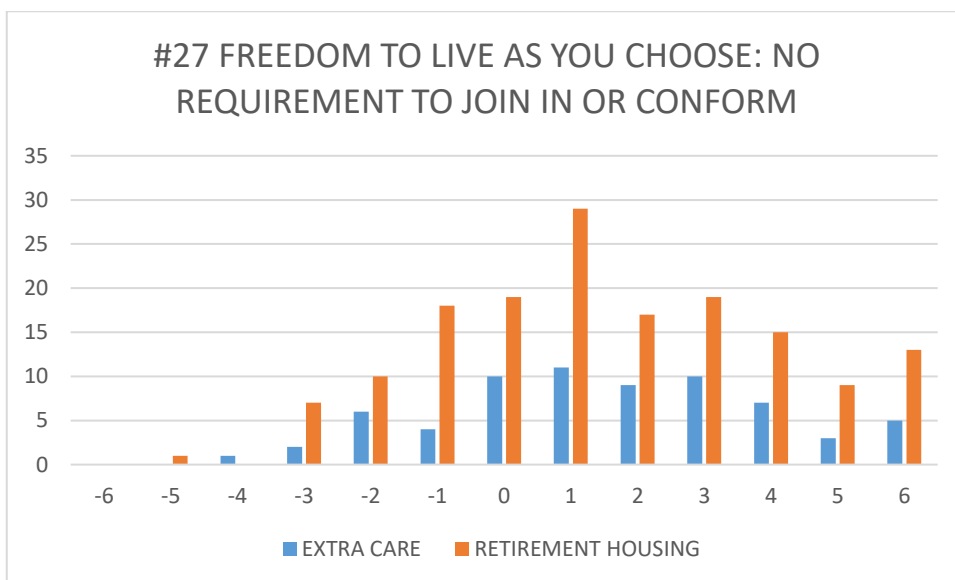
24 out of 157 (15%) Retirement Housing participants scored independent living as the statement they most liked and most wanted at +6. There are clearly some residents for whom this is very important (A on graph), but over half (82 out of 157 (52%)) of Retirement Housing participants scored this in the range +1 to +4 (B on graph) suggesting this was important but not a paramount concern, perhaps because they took it for granted or they had other priorities that they considered to be even more pressing. There are more Retirement Housing participants (37 out of 157 (24%)) who scored this statement (#28) in the range 0 to -2 (C on graph) than who scored it as +5 or +6 (35 out of 157 (22%)) (A on graph) indicating that whilst for some participants this is a crucial issue for others it does not feature as a priority.

For Extra Care participants this was scored reasonably consistently across the range +3 to +6 by 40 out of 68 (59%) Extra Care participants but, as with Retirement Housing, there are a significant number of others who do not consider this to be a priority. 22 out of 68 (32%) Extra Care participants scored this in the range -2 to +1.



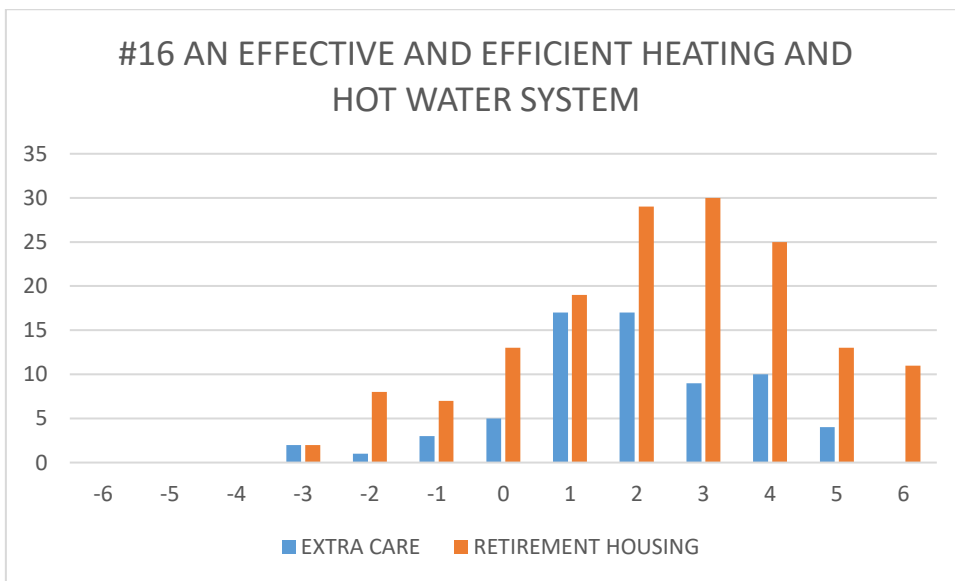


Although there are a some participants that scored Statement #27 at +6 (13 out of 157 (8%) for Retirement Housing and 5 out of 68 (7%) for Extra Care), the general pattern of responses suggests a more normal distribution of preferences based around the most frequent response for both Retirement Housing and Extra Care participants of +1. This suggests that for most participants the freedom to live as they choose and not needing to join in or conform is more of a moderate than a primary concern.



**#16. An effective and efficient heating and hot water system**  
**+2.35 Retirement Housing (5:50), +1.87 Extra Care (9:54)**

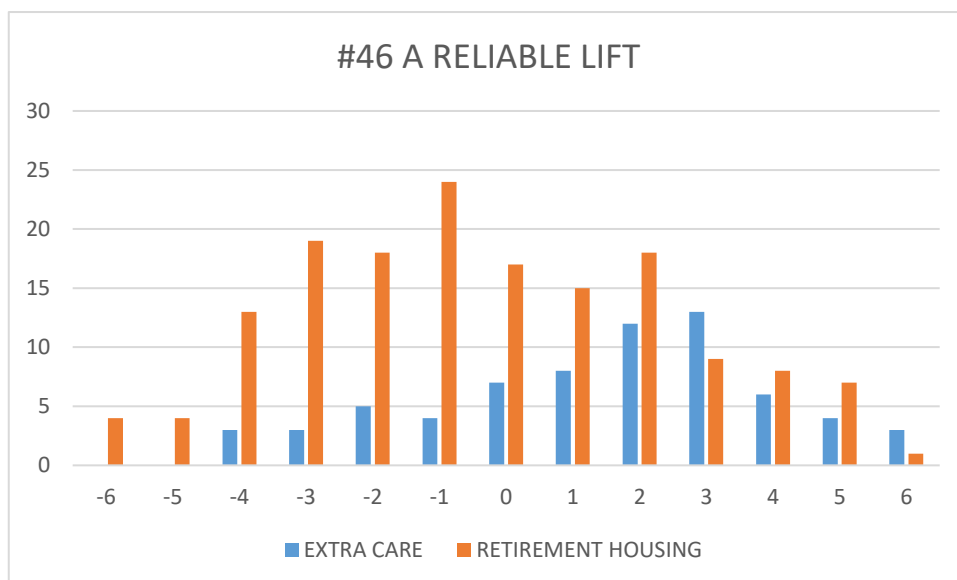
Having an effective and efficient heating and hot water system is clearly an important consideration, but this appears to be more so for Retirement Housing participants than for those from Extra Care. For 24 out of 157 (15%) Retirement Housing participants this was scored as either +5 or +6, whereas no Extra Care participants scored this as +6 and only 4 out of 68 (6%) scored it as +5. The mode score for this statement from Retirement Housing participants is +3 (30 responses), whereas the mode score for Extra Care participants is +1 and +2 (each with 17 responses). As Extra Care residents tend to require more care and support it might have been expected that they would also value the provision of heating and hot water more than Retirement Housing residents. However, this difference in level of preference and priority might be because Extra Care residents have a number of other preferences that they have prioritised ahead of this or because Extra Care properties are generally newer and have been built to a higher standard of energy efficiency with more modern heating systems so residents in Extra Care may not share the concerns and desires of residents of Retirement Housing for improved heating and hot water systems.



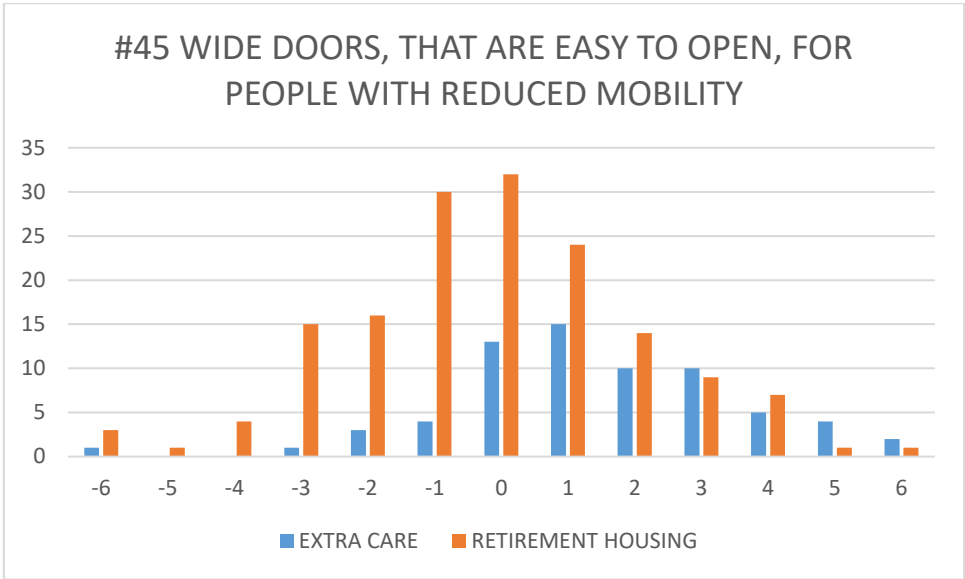
- #46. **A reliable lift**  
 -0.39 Retirement Housing (35:50), +1.44 Extra Care (=14:54)
- #45. **Wide doors that are easy to open, for people with reduced mobility**  
 -0.18 Retirement Housing (31:50), +1.44 Extra Care (=14:54)
- #54 **An accessible bath for those that want or need it (Extra Care)**  
 -0.79 Extra Care (38:54)

The importance of accessibility and ease of mobility are likely to depend upon a participant’s personal circumstances or anticipation of how important this will be for them in the future.

Lifts are a standard feature of all Extra Care properties but are provided in only some Retirement Housing schemes where residents also tend to be more mobile. This may explain some of the difference in support for Statement #46 (A reliable lift) which has an average (mean) score of +1.44 for Extra Care and an average score of -0.39 for Retirement Housing. The most frequent (mode) score for Statement #46 is +3 for Extra Care participants, but -1 for Retirement Housing. The results show that there is a wide spectrum of views amongst the Retirement Housing participants about the importance of a reliable lift with scores ranging from -6 to +6 with the eighth highest standard deviation of 2.77. Even though there were no Extra Care participant who scored Statement #46 as -6 or -5 there is still a considerable spread of views and substantial tail to the distribution (with 22 out of 68 (32%) of scores at 0 or negative) and a standard deviation of 2.53.

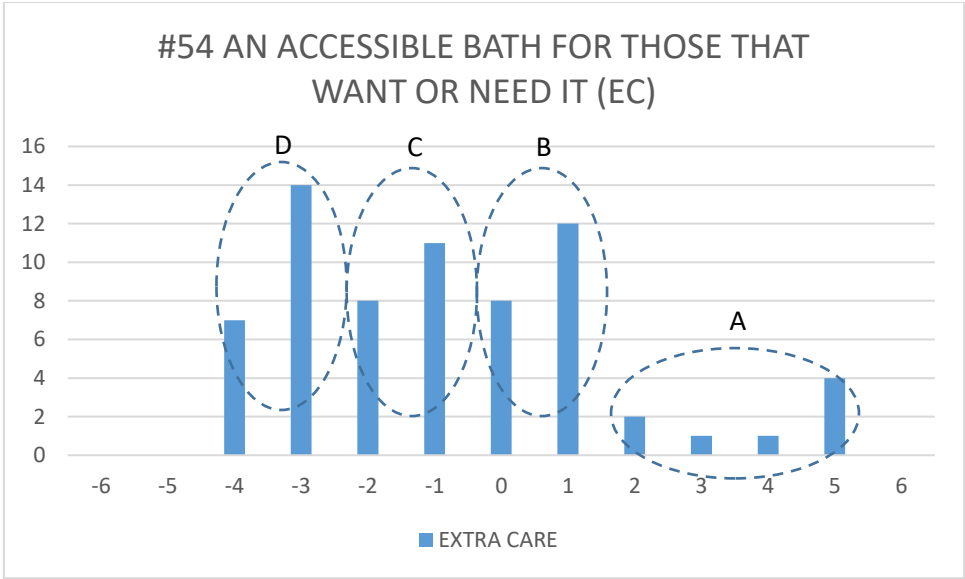


Although the average score from Extra Care participants for Statement #47 (Wide doors, that are easy to open, for people with reduced mobility) (+1.44) is exactly the same as for Statement #46, the profile of responses is different with +1 (rather than +3 for #46) as the most common score. For Retirement Housing participants Statement #45 not only has a higher average (mean) score of -0.18 (rather than 0.39 for #46) but the most common (mode) score is also 0 (rather than -1 for #46).



The more positive stance towards the provision of wide and easy to open doors by Retirement Housing participants and the less enthusiastic, but also negative, reaction from participants from Extra Care is perhaps more indicative of the general recognition of the benefits of doors that are simple to negotiate rather than the specific, and expensive, provision of lifts.

Statement #54 (An accessible bath for those that want or need it) is only applicable to Extra Care residents/participants. There are only 8 out of 68 (12%) of Extra Care participants who scored this as +2 or above (A on graph) and broadly comparable numbers who scored this as 0 or +1 (20 participants), -2 or -1 (19 participants), and -3 or -4 (21 participants) (B – D on graph). It therefore appears that although nobody particularly strongly dislikes or does not want an accessible bath (there are no scores at -5 or -6) it is something that is only important to a small proportion of residents and is something that is either tolerated or disliked in degrees by others.

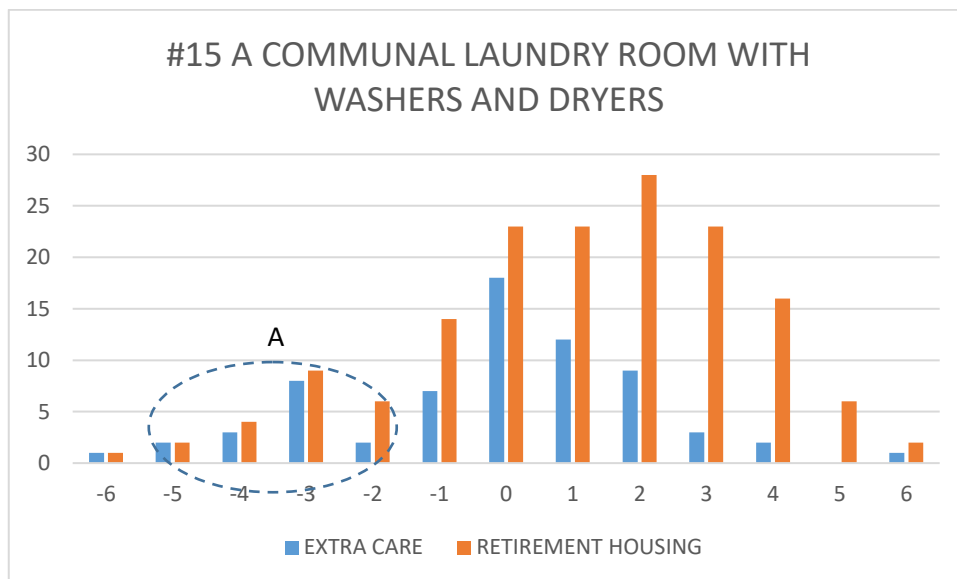


**#15. A communal laundry with washers and dryers**  
**+1.08 Retirement Housing (14:50), -0.15 Extra Care (=29:54)**

Having a communal laundry with washers and dryers (Statement #15) is the 14<sup>th</sup> most liked or wanted feature for Retirement Housing participants but is ranked as only the joint 29<sup>th</sup> most important statement by the participants of Extra Care.

113 out of 157 (72%) Retirement Housing participants scored Statement #15 in the range 0 to +4, indicating this is a positive feature but not a top priority, with +2 as the most frequent score (28 participants). There are some (8 out of 157 (5%)) Retirement Housing participants see a communal laundry as a factor of primary important in order to achieve a score of +5 or +6. There does though appear to be a cohort of participants for whom a communal laundry is a negative feature who scored Statement #15 in the range -2 to -6 (22 out of 157 (14%)) with a sub-peak at -3 in the distribution (9 participants) (A on graph).

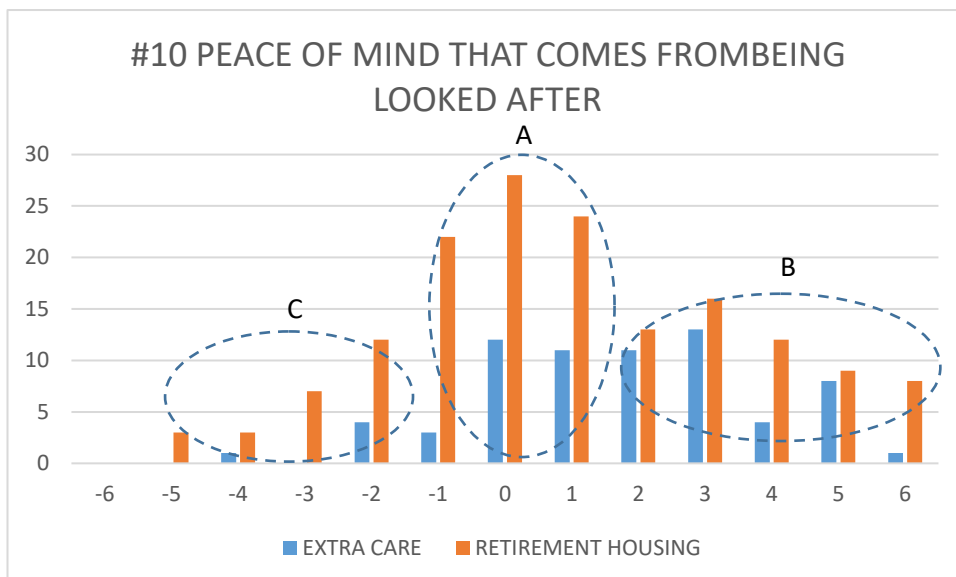
For Extra Care participants the most common score for Statement #15 is 0 indicating that this is seen as a low priority and 46 out of 68 (68%) Extra Care participants scored Statement #15 in the range -1 to +2. As with Retirement Housing, there is a set of participants who see a communal laundry as a negative feature with 16 out of 68 (24%) scoring #15 between -2 and -6 with a sub-peak at -3 in the distribution (8 participants) (A on graph).



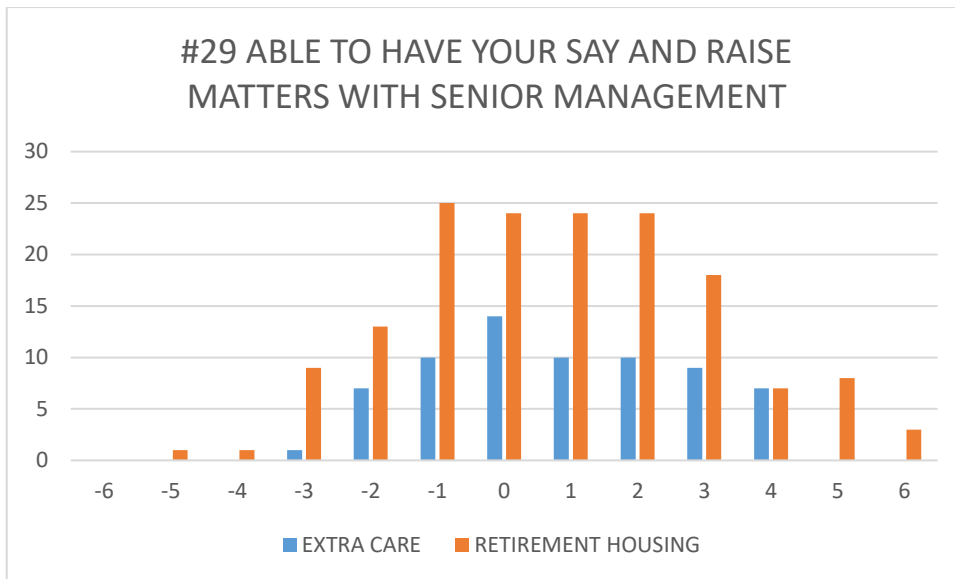
- #10. Peace of mind that comes from being looked after**  
**+0.92 Retirement Housing (15:50), +1.75 Extra Care (10:54)**
- #29. Able to have your say and raise matters with senior management**  
**+0.80 Retirement Housing (18:50), +0.85 Extra Care (18:54)**
- #30. Residents are engaged and able to exercise choice and control**  
**-0.05 Retirement Housing (28:50), +0.49 Extra Care (23:54)**
- #33. Residents who take control and assume responsibility for organising things**  
**-1.69 Retirement Housing (42:50), -1.15 Extra Care (41:54)**

These statements provide an indication of the extent to which participants want to be engaged and play an active part in the management and operation of their Retirement Housing or Extra Care environment.

Being looked after (Statement #10) is scored positively (+1 or above) by 48 out of 68 (71%) Extra Care participants although only 1 participant gave this a score of +6 to indicate it is their top priority. Although overall Retirement Housing participants are positive about Statement #10 the most common scores are 0 (28 participants), +1 (24 participants) and -1 (22 participants) indicating that almost half (47%) of Retirement Housing participants are neutral about this proposition (A on graph). 58 out of 157 (37%) Retirement Housing participants are more positive about Statement #10 and the prospect of being looked after and scored it as +2 or above (B on graph) and just 25 out of 157 (16%) of Retirement Housing participants gave this a score of -2 or more negative indicating this is something they would not want or did not like (C on graph).

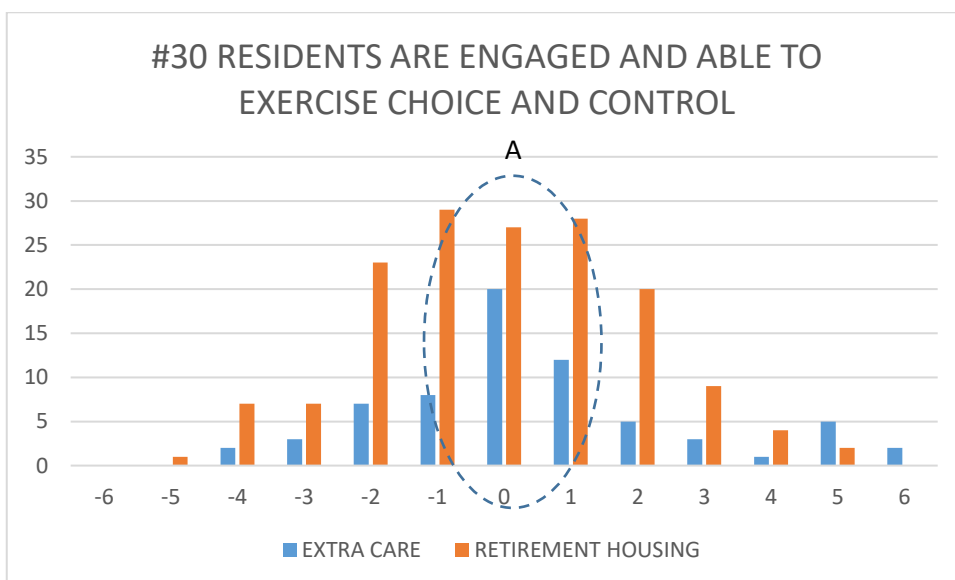


There are only 24 out of 157 (15%) Retirement Housing participants who scored being able to have your say and raise matters with senior management (Statement #29) as -2 or more negative, indicating it is a factor that they do not like or want, but only 18 out of 157 (11%) of Retirement Housing participants gave this a score of +4 or above to show it was of high importance. More than 73% of Retirement Housing gave Statement #29 a score in the range -1 to +3 indicating it was a neutral issue or of only limited importance. Similarly for Extra Care no participants scored Statement #29 above +4 or more negative than -3 and the most frequent score was 0. But overall this is something that is seen as being a positive proposition for both Retirement Housing and Extra Care.



It does not appear that there is a particular appetite from either Retirement Housing or Extra Care participants to exercise choice or control (Statement #30). 84 out of 157 (54%) Retirement Housing participants and 40 out of 68 (59%) Extra Care participants gave this a score between -1 and +1 (A on graph).

7 (10%) of Extra Care participants indicated that being engaged and able to exercise choice and control was a high priority for them, with a score of +5 or +6, which might be linked to their desire to retain control over their care requirements and avoid institutional living.



There is a clear indication that participants of Retirement Housing and Extra Care do not generally want their fellow residents to take control and assume responsibility for organising things (Statement #33). Two thirds (45 out of 68) of Extra Care participants gave this a negative score as did 71% (112 out of 157) Retirement Housing participants.



The results for Statements #10, #29, #30 and #33 appear to challenge the assumption that is often made that residents want more opportunity to direct and determine how Retirement Housing and Extra Care schemes are run.

- #4. Close to shops, amenities and transport**  
**+0.89 Retirement Housing (16:50), -0.32 Extra Care (=33:54)**
- #40. Buildings and gardens are kept clean and tidy**  
**+0.84 Retirement Housing (17:50), +0.04 Extra Care (=27:54)**
- #25. In a nice area with attractive surroundings**  
**+0.59 Retirement Housing (20:50), +0.40 Extra Care (25:54)**
- #7. The appearance of the Court creates a good impression**  
**+0.52 Retirement Housing (22:50), +0.19 Extra Care (26:54)**

The appears to be a distinction between Statement #4 (Close to shops, amenities and transport) and Statements #40, #25 and #7 which concern the appearance and desirability of the setting of the Retirement Housing or Extra Care scheme.

The proximity and convenience of location for access to services (Statement #4) is ranked higher by Retirement Housing participants than concerns about what the scheme looks like, but the opposite is true for Extra Care participants.

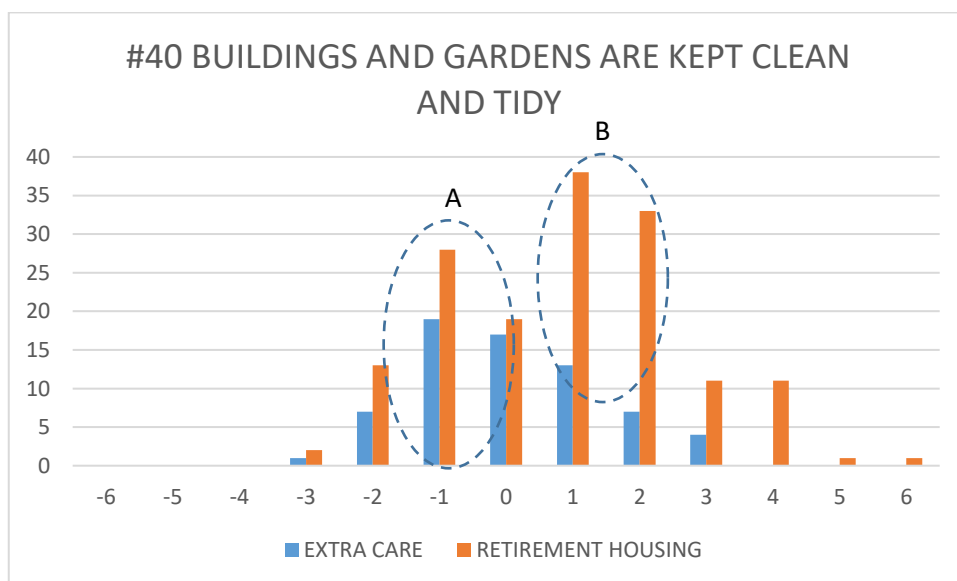
For both Retirement Housing and Extra Care there are participants for whom location does not seem to be a particular concern (either negative or positive). 92 out of 157 (59%) Retirement Housing participants and 57 out of 68 (84%) Extra Care participants scored Statement #4 in the range -2 to +2 (A on graph). But amongst the Retirement Housing participants there is also a cohort that is positive about wanting to be close to shops, amenities and transport with 50 out of 157 (32%) giving this a score of +3 or more, but only 3 out of 68 (4%) Extra Care participants gave this an equivalent positive score (B on graph).



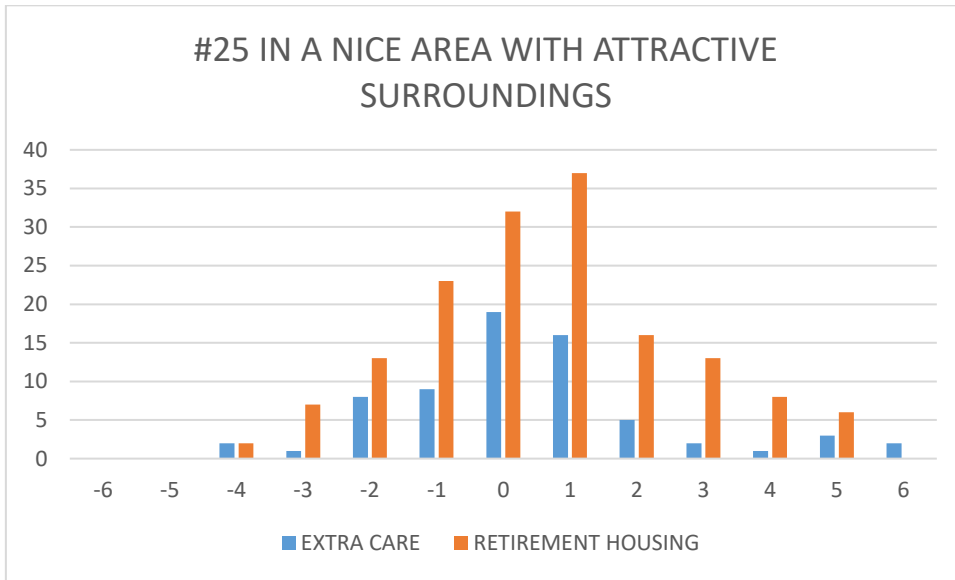


Although the most frequent score for Statement #40 (buildings and gardens are kept clean and tidy) from Extra Care participants is -1 (19 participants), but 41 out of 68 (60%) Extra Care participants gave this statement a higher score and hence the average (mean) score is just positive at 0.04.

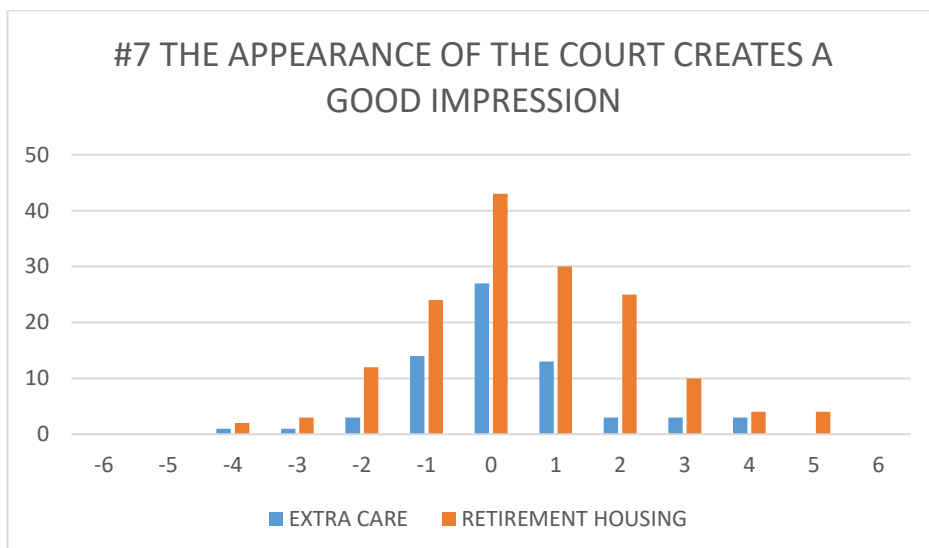
There are 60 out of 157 (38%) Retirement Housing participants who scored Statement #40 at 0 to -2 so do not seem concerned about whether the buildings and gardens are kept clean and tidy (A on graph). The most frequent scores for Retirement Housing participants are +1 (38 participants) and +2 (33 participants) indicating that 45% of participants were moderately concerned about keeping their scheme clean and tidy (B on graph) and a further 22 out of 157 (14%) participants scored this as +3 or +4.



For participants of both Retirement Housing and Extra Care living in a nice area with attractive surroundings (Statement #25) is typically seen as a neutral or slight positive, but is it not a feature that is particularly desired or despised with only 16 (10%) Retirement Housing and 8 (12%) Extra Care participants scoring more positive than +3 or more negative than -3. The most frequent scores are 0 (19 Extra Care participants and 31 Retirement Housing participants) and +1 (16 Extra Care participants and 37 Retirement Housing participants) accounting for 43% of Retirement Housing participants and 51% of Extra Care participants.



The most frequent score for both Retirement Housing and Extra Care participants to Statement #7 (The appearance of the Court creates a good impression) is 0 (43 Retirement Housing participants and 27 Extra Care participants). The average (mean) scores are slightly above zero (0.52 for Retirement Housing and 0.19 for Extra Care). There are only 8 (12%) Extra Care participants and 23 (15%) Retirement Housing participants who gave Statement #7 a score more positive than +2 or more negative than -2 indicating that the majority of participants had a neutral view and did not consider this to be an issue of particular concern.



The statements regarding appearance and impression (#7 and #40) have some of the lowest standard deviations for Retirement Housing (#7 – 1.73 2<sup>nd</sup> lowest, #40 – 1.77 3<sup>rd</sup> lowest) and Extra Care (#7 – 1.48 3<sup>rd</sup> lowest, #40 – 1.40 lowest) indicating this is an issue on which there is a general consensus and little controversy.

**#44. Information about costs and charges is correct, clear and comprehensive**

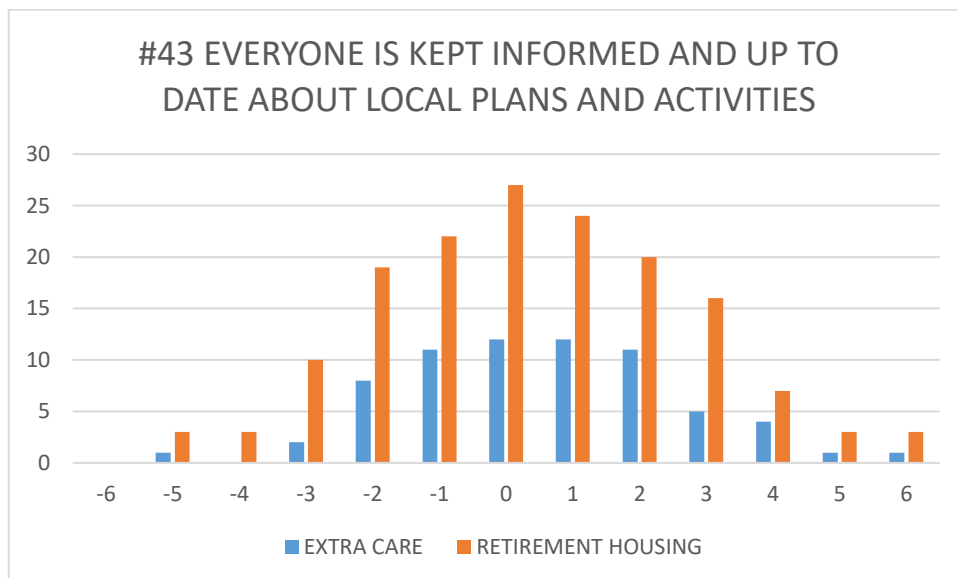
**+0.73 Retirement Housing (19:50), +0.74 Extra Care (19:54)**

**#43. Everyone is kept informed and up to date about local plans and activities**

**+0.36 Retirement Housing (25:50), +0.56 Extra Care (21:54)**

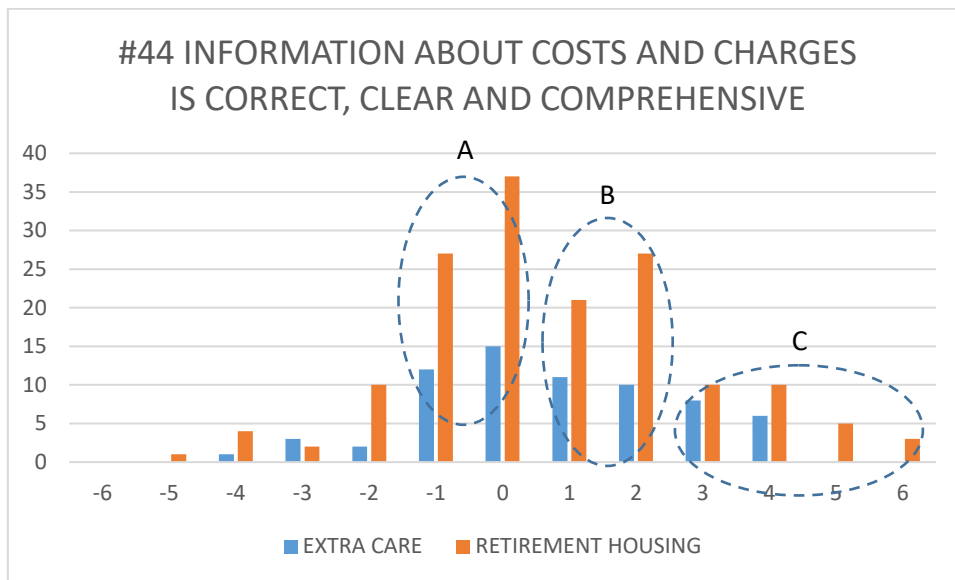
These statements are both concerned with information and being informed, but distinguish between the quality of information (Statement #44 – correct, clear and comprehensive) and its timeliness (Statement #43 – up to date) as well as differing with regard to the subject matter under consideration (Statement #44 – costs and charges; Statement #43 – local plans and activities).

Statement #43 (Everyone is kept informed and up to date about local plans and activities) appears to have a distribution of scores that resembles a normal distribution for both Retirement Housing and Extra Care. For Retirement Housing the most common score is 0 (27 participants) with 73 participants more positive and 57 more negative giving an average (mean) of 0.36. For Extra Care 0 and +1 are the joint most common scores, each with 12 participants, but -1 and +2 also had the same level of support from 11 Retirement Housing creating an even distribution with an average (mean) score of 0.56.



The distribution of scores for Statement #44 (Information about costs and charges is correct, clear and comprehensive) is not as even as for Statement #43. 0 and -1 are the most common scores for both Retirement Housing and Extra Care accounting for 27 (40%) Extra Care participants and 64 (41%) Retirement Housing participants (A on graph). There

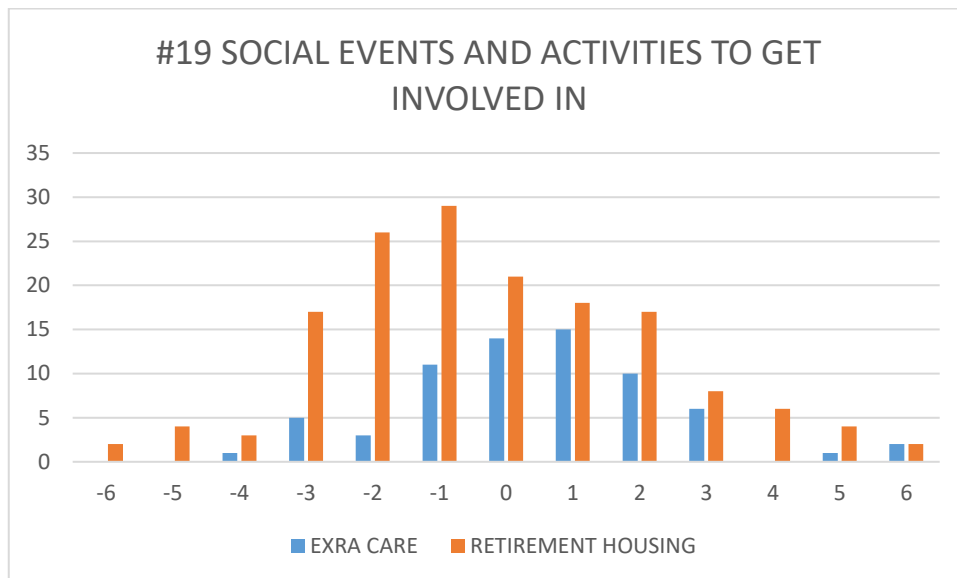
are, however, other cohorts for whom the availability of correct, clear and comprehensive information about costs and charges is moderately important (scores of +1 and +2) or a priority (scores of +3 or above). There are 48 (31%) Retirement Housing participants and 21 (31%) Extra Care participants for whom this is of moderate importance (B on graph) plus 25 (18%) Retirement Housing participants and 14 (21%) Extra Care participants for whom this is a priority (C on graph).



- #19. **Social events and activities to get involved in**  
-0.28 Retirement Housing (34:50), +0.50 Extra Care (22:54)
- #23. **Community spirit and friendship with people of a similar age and outlook**  
+0.51 Retirement Housing (23:50), +0.41 Extra Care (24:54)
- #8. **Companionship of neighbours so you are never lonely**  
+0.55 Retirement Housing (21:50), -0.15 Extra Care (=29:54)
- #11. **Living around people of a similar age and outlook**  
-0.07 Retirement Housing (29:50), -0.24 Extra Care (32:54)
- #12. **Occupancy restricted to only retired people aged over 65**  
-0.60 Retirement Housing (36:50), -2.25 Extra Care (48:54)
- #36. **Residents with dementia or who need to be looked after**  
-1.23 Retirement Housing (39:50), -1.06 Extra Care (39:54)
- #37. **Living in close proximity to others in a compact community**  
-1.65 Retirement Housing (41:50), -1.53 Extra Care (46:54)

These statements indicate the extent to which participants from Retirement Housing and Extra Care are seeking social activities, community living and age specificity.

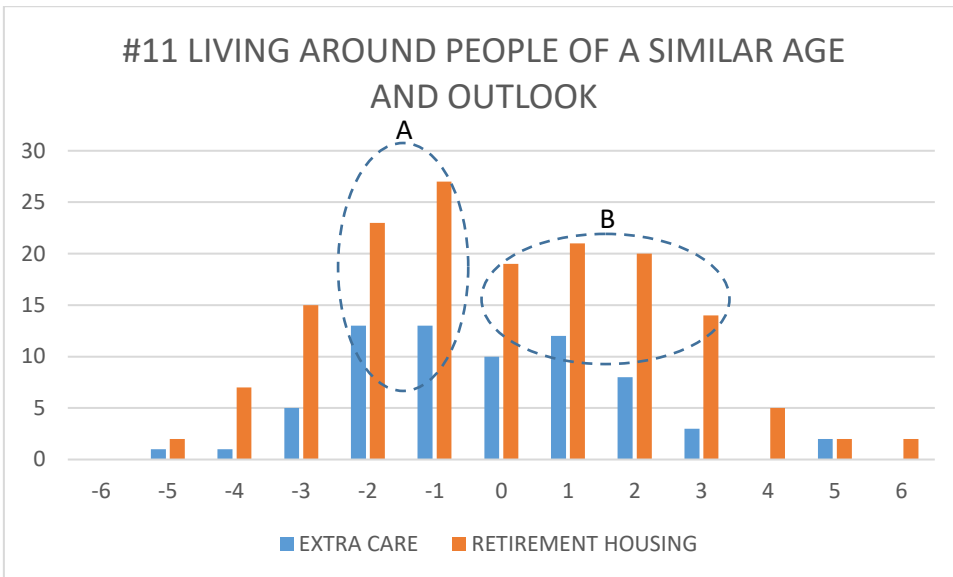
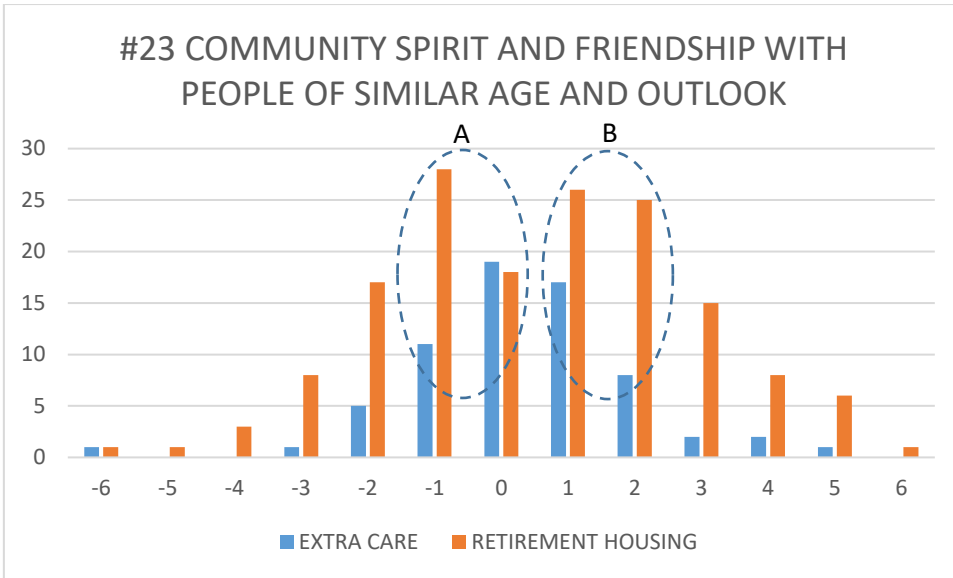
For Retirement Housing participants the most common indication was that they were not interested in social events and activities (Statement #19) with 29 (18%) participants giving this a score of -1 and 26 (17%) participants a score of -2 and a further 26 (17%) were even more negative indicating an active dislike of social events. Although there are 76 (48%) Retirement Housing participants who scored this as 0 or a positive this is not enough to give Statement #19 an overall positive average score. However, for Extra Care participants were more positive about social events and activities with a mean score of 0.5 and +1 as the most common score. There are also relatively few Extra Care residents who actively dislike but also not most important either.



The average (mean) view is that simply living with people of a similar age and outlook (Statement #11) is a slight negative but that the community spirit and friendship this brings (Statement #23) is moderately positive.

For Retirement Housing participants there appear to be two alternative sets of responses to Statement #23: those scoring it at 0 (18 participants), the most frequent score of -1 (28 participants) (A on graph) as well as those that are more negative in their scores (30 participants) and a second cohort scoring it at +1 (26 participants) or +2 (25 participants) (B on graph) as well as those who are more positive in their views (30 participants). For Statement #11 there may also be two cohorts of views amongst Retirement Housing participants: those with scores of -1 or -2 (50 participants) (A on graph) or more negative (30 participants) and those with scores of 0, +1 and +2 (60 participants) (B on graph) or more positive (23 participants).

This form of distinction does not appear to be evident for Statement #23 amongst participants from Extra Care, but may be indicated for Statement #11 with the most common responses at -1 and -2 (both with 13 participants) but a slight secondary peak (of 12 participants) as +1.

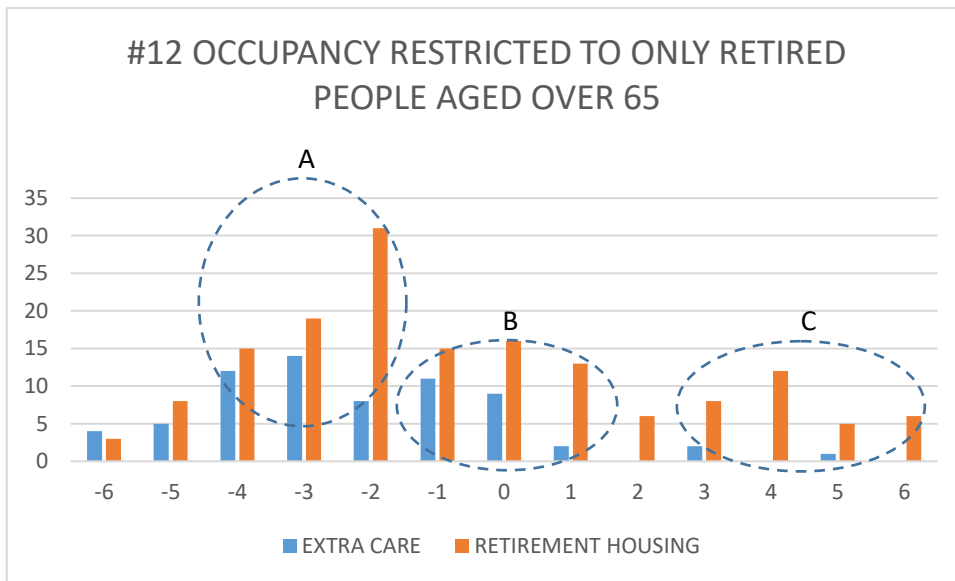


These distinctions also appear to reflect differences of views about whether occupancy should be restricted only to retired people aged over 65 (Statement #12).

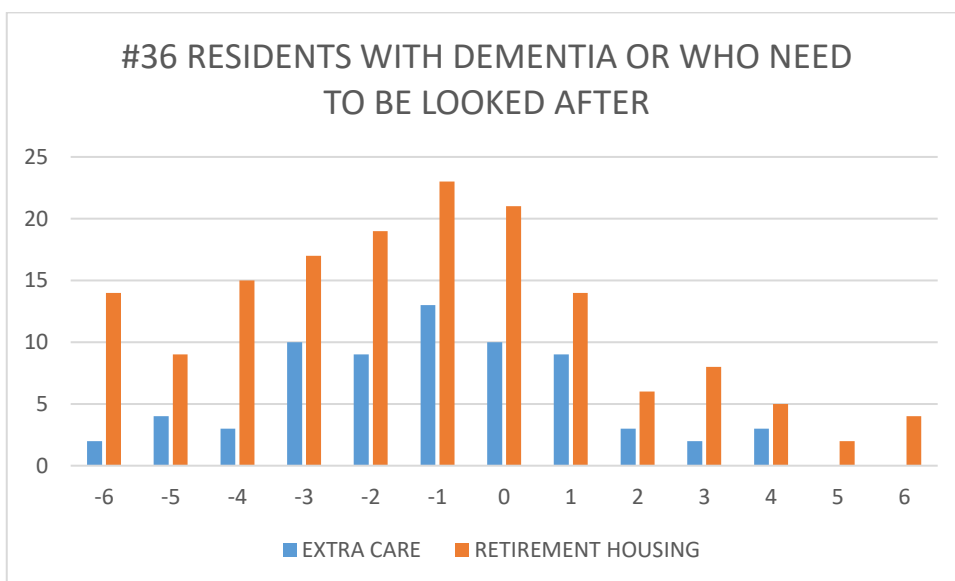
Views on this issue from Extra Care participants were quite negative with an average score of -2.25 which meant it was ranked 48<sup>th</sup> out of 54 statements. There do though appear to be two groupings in the results with one cohort of 43 Extra Care participants who definitely do not like or want occupancy to be age restricted with scores of -2 or more negative (A on graph) and another group of 22 participants who appear more indifferent and scored Statement #12 between -1 and +1 (B on graph).

Overall the views of Retirement Housing participants are less negative with an average score of -0.6 and ranked 36<sup>th</sup> out of 50 statements. There is a set of 76 Retirement Housing participants who definitely do not like or want occupancy to be age restricted with scores

of -2 or more negative (A on graph) and another group of 44 participants who appear more indifferent and scored Statement #12 between -1 and +1 (B on graph). For Retirement Housing though there is a third set of 31 participants who appear to favour occupancy being restricted to only retired people aged over 65 so have scored this at +3 or more (compared with only 3 participants from Extra Care with score in this range) (C on graph). As a consequence of these differences of views Statement #12 has the third highest a standard deviation (3.03) for Retirement Housing participants.



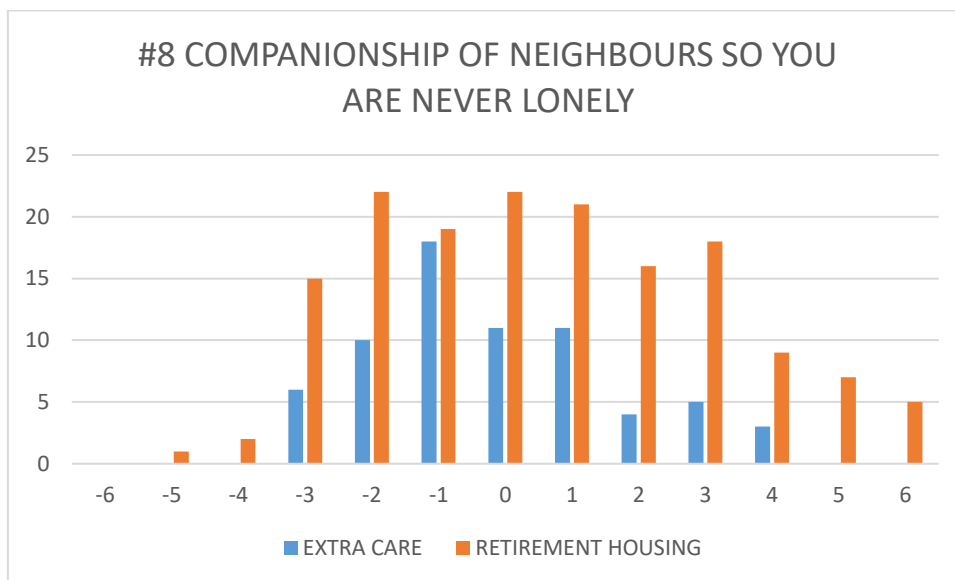
Views about people living with dementia or who need to be looked after (#36) are generally more negative than positive across both Extra Care and Retirement Housing. This perhaps reflects and anxiety not to be reminded of the potential consequences of ageing.



Companionship of neighbours (Statement #8) is seen as being more positive by participants from Retirement Housing (average 0.55 and ranked 21<sup>st</sup> out of 50 statements) than from Extra Care (average -0.15 and ranked joint 29<sup>th</sup> out of 54 statements).

There is a relatively limited distribution of views from Extra Care participants for Statement #8 with none scoring it lower than -3 or higher than +4 with -1 as the most frequent score and resulting in a standard deviation of 1.84.

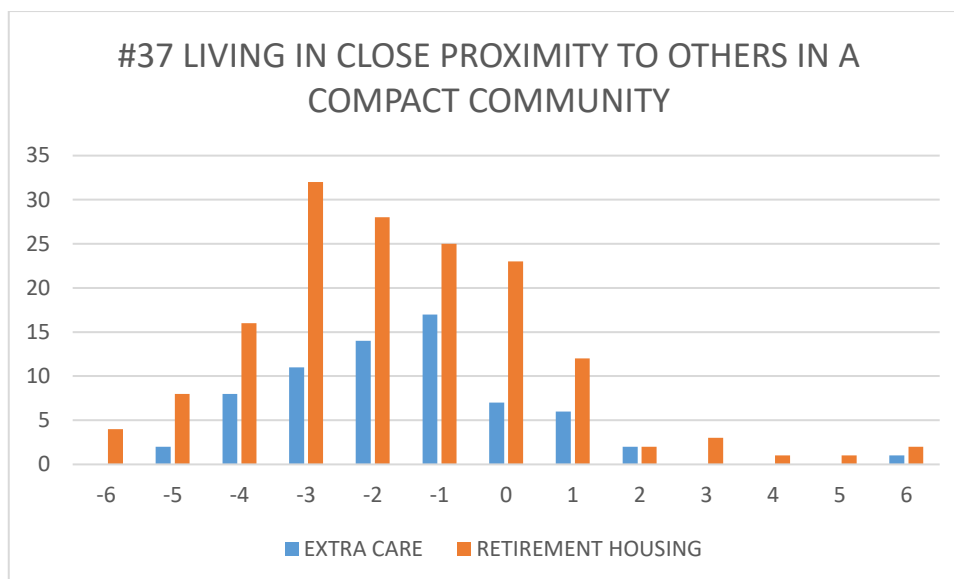
There is a wider range of views for Retirement Housing participants but only 3 out of 157 (2%) participants scored this as more negative than -3 indicating that neighbourly companionship and friendship is not something that is actively disliked even if it is not especially sought after. There are, however, 39 out of 157 (25%) Retirement Housing participants who have scored this at +3 or higher indicating it is a feature that is important and something they like and want.



It appears that even those who want social activities, a community spirit and the companionship of those of a similar age and outlook do not want to live in close proximity to others as part of a compact community (Statement #37). Although there are just 9 out of 157 (6%) of Retirement Housing participants who have scored this a more positive than +1 the average score is -1.65 and most common score is -3. Similarly for Extra Care participants, although the most frequent score is -1 the average (mean) is -1.53 and only 2 out of 68 (3%) Extra Care participants scored this as more positive than +1.

Statement #37 could possibly be interpreted as bringing together the negative perspectives of Statement #38 (Small flats) combined with concerns associated with gossip, loss of privacy and bad behaviour of others (Statements #35, #34 and #32).

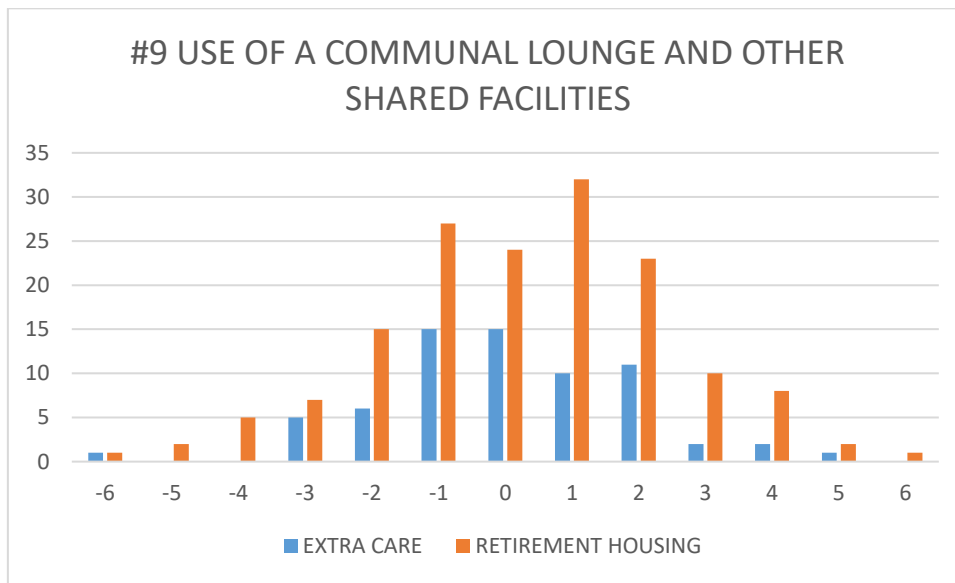




- #9. **Use of a communal lounge and other shared facilities**  
+0.27 Retirement Housing (26:50), +0.04 Extra Care (=27:54)
- #49. **Communal Lounge used by external organisations and groups**  
-2.18 Retirement Housing (44:50), -1.72 Extra Care (47:54)
- #22. **Sufficient car parking spaces**  
-0.03 Retirement Housing (27:50), -1.19 Extra Care (42:54)
- #20. **Availability of a good internet connection and/or wifi**  
-0.94 Retirement Housing (38:50), -1.40 Extra Care (=43:54)
- #50. **Guest room available for visitors**  
-0.17 Retirement Housing (30:50), -1.12 Extra Care (40:54)
- #18. **A garden or balcony so you can sit out in private**  
-0.26 Retirement Housing (32:50), -0.32 Extra Care (=33:54)
- #41. **Contemporary kitchens and bathrooms**  
-0.27 Retirement Housing (33:50), -0.57 Extra Care (35:54)
- #47. **A suitable storage area for buggies and other large items**  
-1.61 Retirement Housing (40:50), -0.60 Extra Care (36:54)
- #52. **An on-site restaurant (Extra Care)**  
+0.63 Extra Care (20:54)
- #53. **Hairdressing salon on-site (Extra Care)**  
-0.74 Extra Care (37:54)

It is notable that these features and facilities, that are often considered to encapsulate the essential characteristics of Retirement Housing and Extra Care, do not appear to be highly ranked by participants. Only Statement #9 (Use of a communal lounge and other shared facilities) and Statement #52 (An on-site restaurant – For Extra Care only) have overall positive average scores and only Statement #52 appears in the top half of the statement rankings.

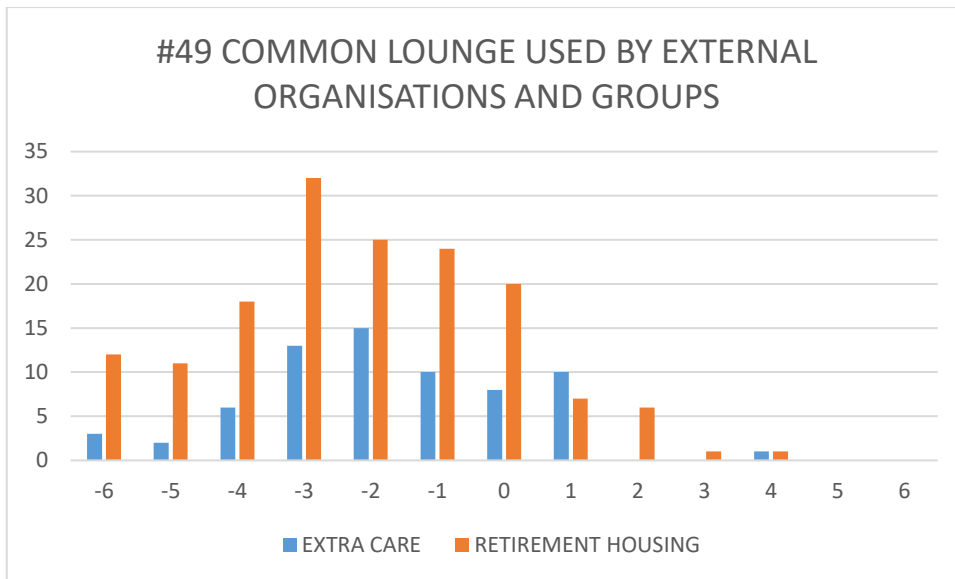
Although Extra Care schemes tend to have more communal facilities and these to be more extensive than in Retirement Housing the responses to Statement #9 indicate that participants of Extra Care do not seem to put as much value on these facilities. The most common scores for Extra Care are -1 and 0 (each with 15 participants) but with 75% of participants in the range -1 to +2. For Retirement Housing the most frequent score is +1 (with 32 participants) and two thirds (68%) of participants in the range -1 to +2 but with 21 out of 157 (13%) of participants scoring this a =3 or above indicating it was something they particularly wanted or liked.



The average (mean) score for Statement #49 (Communal lounge used by external organisations and groups) is the 7<sup>th</sup> worst statement for Retirement Housing participants and 8<sup>th</sup> worst for those from Extra Care.

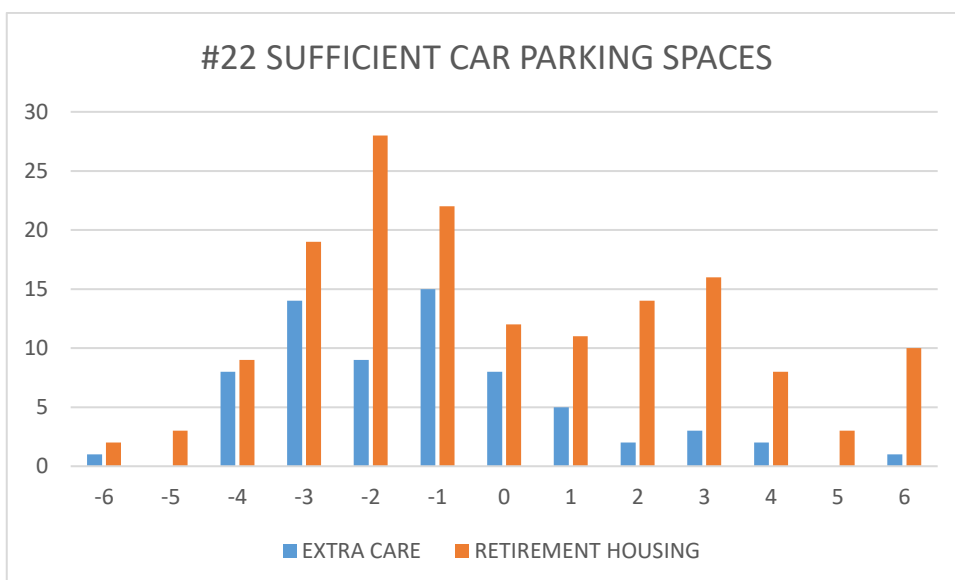
The most frequent score from 32 (20%) participants of Retirement Housing for use of the common lounge by external third parties is -3. 41 out of 157 (26%) Retirement Housing residents scored Statement #49 but the high negative score is also a consequence of this only being seen as a positive feature, with a score of +2 or more, by 8 out of 157 (5%) participants.

For Extra Care participants the most frequent score assigned to use of the common lounge by external third parties was -2 by 15 out of 68 (22%) participants, but only 1 out of 68 (1%) participants regarded this as a positive feature worthy of a score of +2 or more.

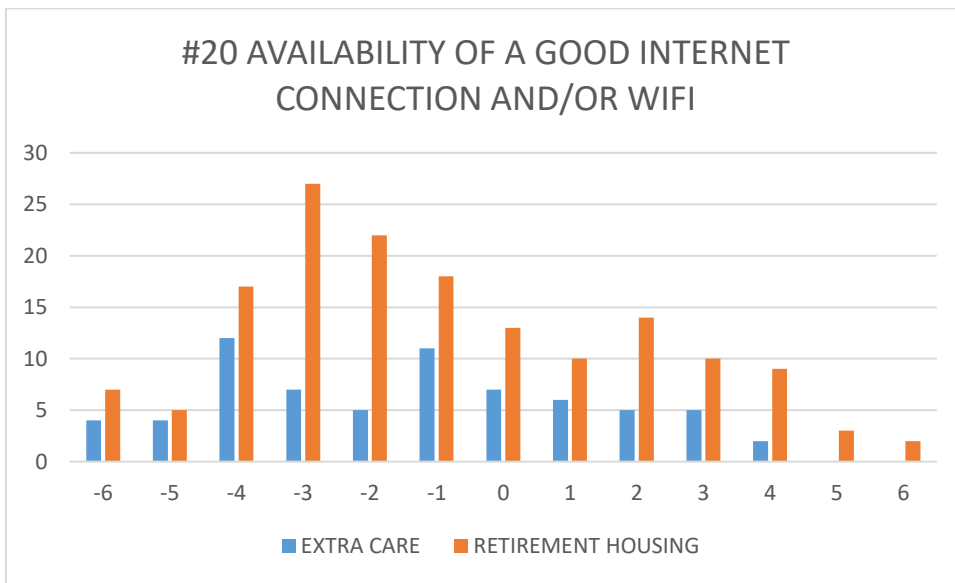


Both Statement #22 (Sufficient car parking spaces) and Statement #20 (Availability of a good internet connection and/or wifi) appear to have two sets of perspectives in their responses.

For Retirement Housing participants the most common response to Statement #22 is -2 indicating that for many participants this is not an issue or of interest (possibly because they do not have a car or encounter problems with parking), but for some there is a moderate concern for car parking provision with 38 out of 157 (24%) Retirement Housing participants giving this a score between +2 and +4 and a further few (13 out of 157 (8%)) for whom this is a top priority. Similarly there are Extra Care 14 out of 68 (21%) Extra Care participants who scored Statement #22 as -3 and 15 out of 68 (22%) who scores it as -1 and a further 13 (19%) who scored Statement #22 as a positive (+1 or above) indicating car parking is something they want or value.

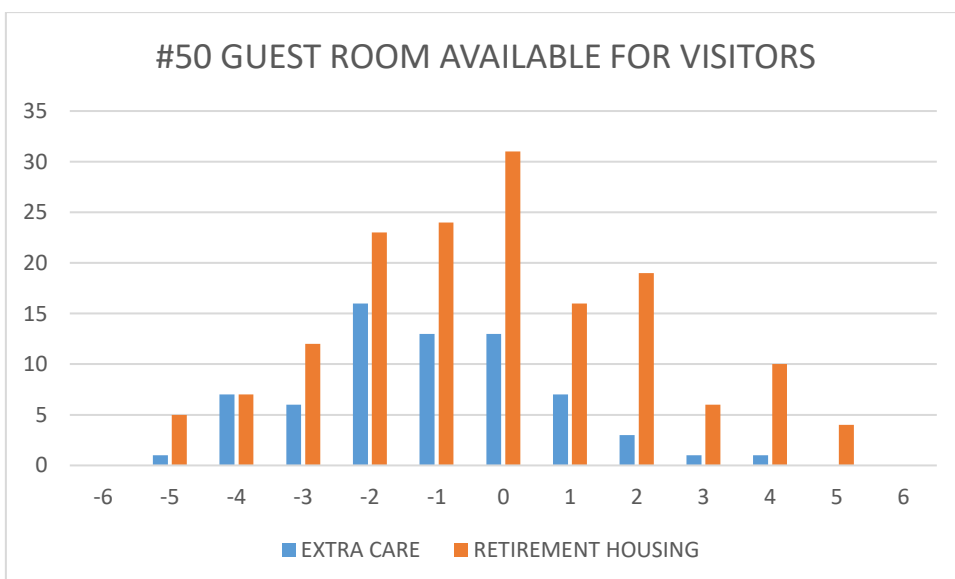


Overall the availability of a good internet connection and/or wifi was scored as -0.94 for Retirement Housing with the most frequent score of -3 (27 participants) suggesting that overall this is a feature that is more disliked and not wanted than desired, but 14 Retirement Housing participants scored Statement #20 +2 and 48 out of 157 (31%) gave this a positive score (+1 or more) indicating that it is something that they would like or want. For Extra Care the most common score for Statement #20 is -4 (12 participants), but there are also 11 participants with a score of -1 indicating a degree of indifference rather than rejection of the provision of internet and/or wifi connectivity.

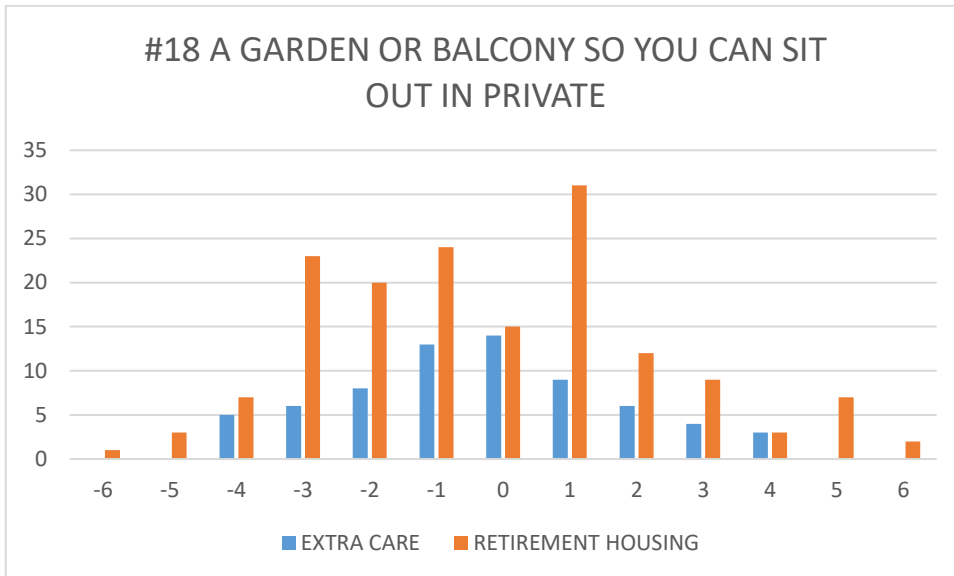


The overall average scores for Statement #50 (Guest room available for visitors) and Statement #18 (A garden or balcony so you can sit out in private) are moderately negative reflecting the general indifference to these features. There are, however, indications that for some these issues are important.

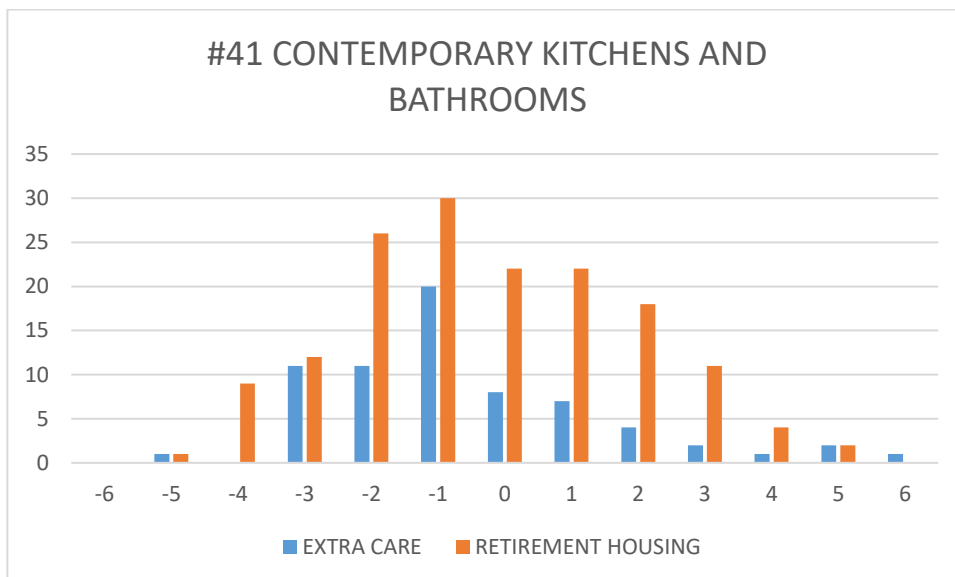
35 out of 157 (22%) Retirement Housing participants scored having a guest room as +1 or +2 and a further 20 (13%) rated it as +3 or above suggesting this is of some importance.

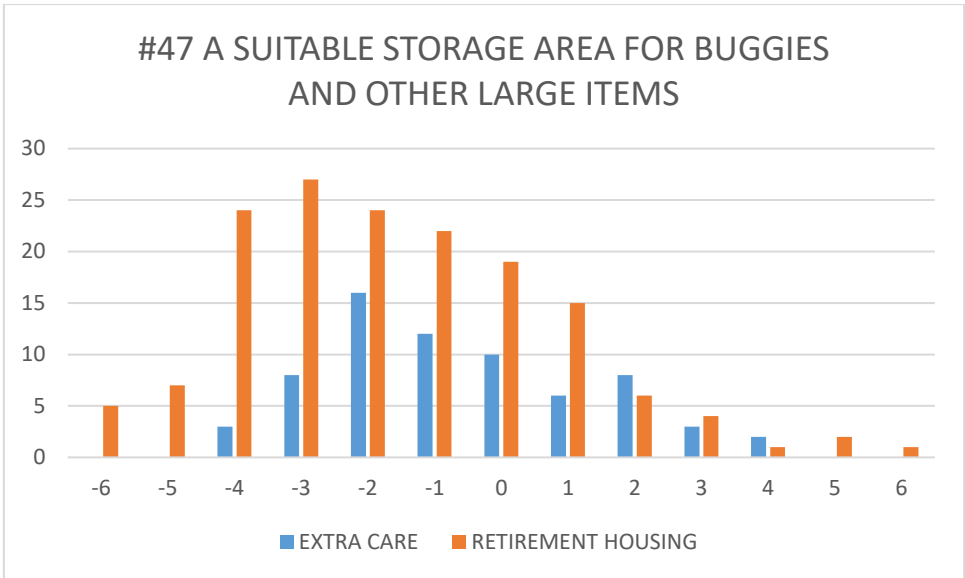


The most frequent score from Retirement Housing participants for Statement #18 is +1 (31 out of 157 (20%) participants) with 64 out of 157 (41%) of Retirement Housing participants giving this a positive score indicating that a garden or balcony where they can sit out in private is something they like or want. For Extra Care 22 out of 68 (32%) participants were positive about this.

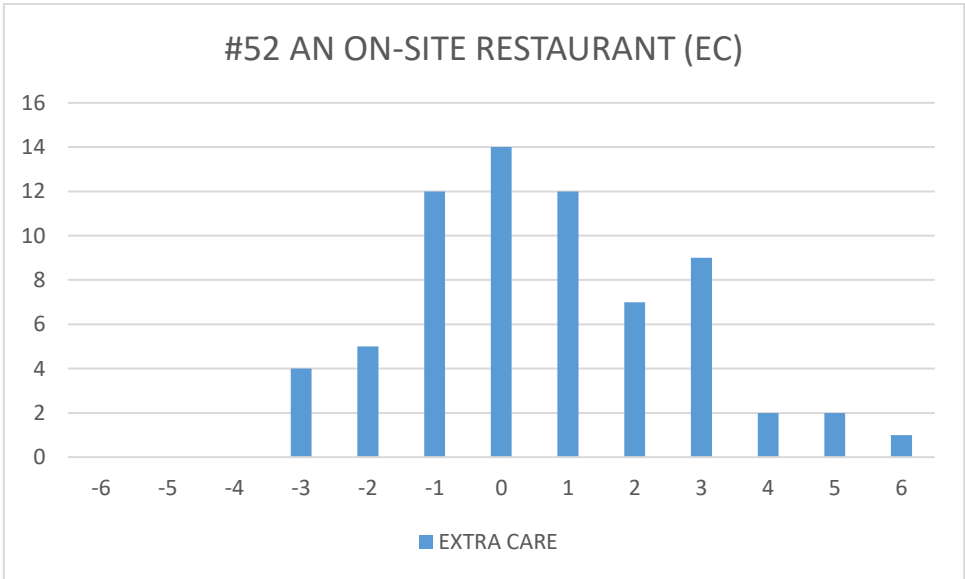


There are few people who either intensely dislike or who particularly want to have a contemporary kitchen or bathroom (Statement #41) or similarly who object to or seek to prioritise the provision of storage areas for buggies or bulk items (Statement #47). The majority of participants of Retirement Housing and Extra Care appear to be indifferent about these features and only a minority score them positively.





No Extra Care participants scored having an on-site restaurant (Statement #52) as more negative than -3, indicating that even if it was not something they wanted or used it was not seen as something that was particularly disliked. 8 out of 68 (12%) of Extra Care residents do though object to the provision of an on-site hairdresser and hence scored this as more negative than -3.

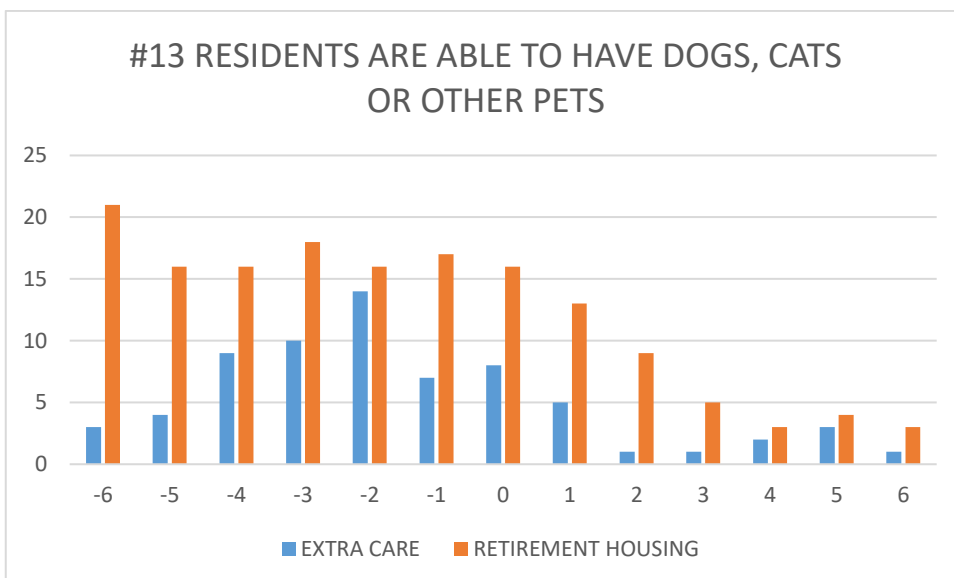




**#13. Residents are able to have dogs, cats or other pets**  
**-1.76 Retirement Housing (43:50), -1.47 Extra Care (45:54)**

Some residents highly value being able to have dogs, cats or other pets, hence 6 out of 68 (9%) Extra Care participants and 10 out of 157 (6%) Retirement Housing participants scored Statement #13 at +4 or above. There is though a substantial cohort of residents who dislike and do not want residents with pets and a significant proportion strongly object.

For Retirement Housing 104 out of 157 (66%) participants gave Statement #13 a negative score (-1 to -6) with -6 as the most frequent response from 21 (13%) participants. Although -2 is the most frequent score from 14 (21%) Extra Care participants, there are 47 out of 68 (69%) participants who gave this a negative score.



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## **Appendix 15**

### **Single Centroid Loadings and Arrays for Extra Care Combined and Sites 1-5**

## EC Combined – Single Factor

**Factor Matrix** with an X Indicating a Defining Sort

5 Res1	0.7201X	1 Res8	0.5531X
5 Res2	0.7137X	1 Res9	0.7235X
5 Res3	0.7348X	1 Res10	0.6574X
5 Res4	0.4532	1 Res11	0.6848X
5 Res5	0.7073X	1 Res12	0.7367X
5 Res6	0.7055X	1 Res13	0.5073X
5 Res7	0.6180X	1 Res14	0.7974X
5 Res8	0.8018X	1 Res15	0.7192X
5 Res9	0.8229X	1 Res20	0.8809X
5 Res10	0.8668X	1 Res21	0.8500X
5 Res11	0.8795X	3 Res1	0.8013X
5 Res12	0.6962X	3 Res2	0.8018X
5 Res13	0.2409	3 Res3	0.8155X
5 Res14	0.8176X	3 Res4	0.8516X
5 Res15	0.7313X	3 Res5	0.7291X
5 Res16	0.7783X	3 Res6	0.6089X
5 Res17	0.5574X	3 Res7	0.6174X
5 Res18	0.7097X	3 Res8	0.8521X
5 Res19	0.7472X	3 Res9	0.8211X
4 Res1	0.8038X	3 Res10	0.7018X
4 Res2	0.8229X	3 Res11	0.6883X
4 Res3	0.7655X	3 Res12	0.6121X
4 Res4	0.4937	3 Res13	0.6565X
4 Res5	0.5449X	3 Res14	0.5413X
4 Res6	0.7027X	2 Res1	0.1089
4 Res7	0.6664X	2 Res2	0.6367X
4 Res8	0.8299X	2 Res3	0.6869X
4 Res9	0.7333X	2 Res4	0.5434X
1 Res1	0.5331X	2 Res5	0.7842X
1 Res2	0.6227X	2 Res6	0.6774X
1 Res3	0.5982X	2 Res7	0.7509X
1 Res4	0.7557X	2 Res8	0.7148X
1 Res5	0.3964	2 Res9	0.6702X
1 Res6	0.5852X		
1 Res7	0.6511X		
		Expl.Var.	49%

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	34	3	37	20	36	8	23	5	28	21	1	17
35	26	38	49	33	53	9	19	46	27	31	24	51
		12	2	54	41	40	52	42	10	48		
			13	22	47	39	43	45	14			
				50	18	15	44	16				
					11	7	29					
					4	30	6					
						25						

## EC Site 1 – Single Factor

### Factor Matrix with an X Indicating a Defining Sort

1 Res1 0.5182X  
 1 Res2 0.6230X  
 1 Res3 0.5891X  
 1 Res4 0.7909X  
 1 Res5 0.4248  
 1 Res6 0.5640X  
 1 Res7 0.6270X  
 1 Res8 0.6290X  
 1 Res9 0.8183X  
 1 Res10 0.6670X  
 1 Res11 0.7231X  
 1 Res12 0.7870X  
 1 Res13 0.5008X  
 1 Res14 0.7371X  
 1 Res15 0.7659X

Expl.Var. 44%

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
34	3	20	41	4	39	18	46	27	16	14	48	17
32	35	26	13	12	44	7	52	1	24	31	51	21
		38	2	49	9	40	45	5	28	42		
			33	50	15	54	8	25	10			
				22	53	23	11	6				
					37	43	36					
					47	30	19					
						29						

## EC Site 2 – Single Factor

### Factor Matrix with an X Indicating a Defining Sort

2 Res1 0.1742  
 2 Res2 0.7380X  
 2 Res3 0.7849X  
 2 Res4 0.4843X  
 2 Res5 0.6787X  
 2 Res6 0.6687X  
 2 Res7 0.7710X  
 2 Res8 0.8267X  
 2 Res9 0.7380X

Expl.Var. 46%

**Factor Array**

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	26	34	50	11	54	47	42	45	14	46	51	24
35	12	38	33	13	22	30	43	10	48	21	17	31
		3	20	41	53	29	28	1	2	44		
			36	49	52	9	4	16	5			
				37	39	19	27	6				
					40	23	15					
					25	7	8					
						18						

**EC Site 3 – Single Factor**

**Factor Matrix with an X Indicating a Defining Sort**

3 Res1	0.8146X
3 Res2	0.7959X
3 Res3	0.8221X
3 Res4	0.8090X
3 Res5	0.7245X
3 Res6	0.6091X
3 Res7	0.6587X
3 Res8	0.8510X
3 Res9	0.8239X
3 Res10	0.6702X
3 Res11	0.7139X
3 Res12	0.6120X
3 Res13	0.6739X
3 Res14	0.5531X

Expl.Var. 53%

**Factor Array**

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
35	3	49	2	13	43	30	6	45	24	21	31	17
32	34	26	36	20	47	7	5	46	28	48	10	51
		38	12	22	50	8	15	14	16	27		
			37	54	40	9	23	42	1			
				33	53	41	29	52				
					4	39	44					
					18	25	19					
						11						

## EC Site 4 – Single Factor

**Factor Matrix** with an X Indicating a Defining Sort

4 Res1 0.8423X  
 4 Res2 0.8268X  
 4 Res3 0.8113X  
 4 Res4 0.4517  
 4 Res5 0.5292X  
 4 Res6 0.6881X  
 4 Res7 0.7261X  
 4 Res8 0.8864X  
 4 Res9 0.7329X

Expl.Var. 54%

**Factor Array**

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	3	2	20	18	53	30	43	14	48	51	28	1
34	26	38	49	50	47	25	9	4	27	24	31	17
		35	54	36	15	52	16	44	42	21		
			13	22	41	40	23	29	45			
				37	39	11	19	5				
					7	8	46					
					33	10	6					
						12						

## EC Site 5 – Single Factor

**Factor Matrix** with an X Indicating a Defining Sort

5 Res1 0.7545X  
 5 Res2 0.7215X  
 5 Res3 0.7265X  
 5 Res4 0.4424  
 5 Res5 0.7553X  
 5 Res6 0.7429X  
 5 Res7 0.5772X  
 5 Res8 0.7679X  
 5 Res9 0.8110X  
 5 Res10 0.8757X  
 5 Res11 0.8712X  
 5 Res12 0.7097X  
 5 Res13 0.2627  
 5 Res14 0.8175X  
 5 Res15 0.7103X  
 5 Res16 0.7920X  
 5 Res17 0.6104X  
 5 Res18 0.7051X  
 5 Res19 0.7664X  
 5 Res20 0.8738X  
 5 Res21 0.8608X

Expl.Var. 54%

**Factor Array**

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
35	26	12	54	53	33	40	43	45	31	21	1	17
34	32	38	2	20	36	23	25	42	10	28	24	51
		3	13	22	4	19	6	46	27	48		
			37	8	11	44	39	29	16			
				49	50	52	5	14				
					47	41	7					
					18	9	30					
						15						

## **Appendix 16**

### **Single Centroid Loadings and Arrays for Retirement Housing Combined and Sites A-K**

# RH Combined – Single Factor

## Factor Matrix with an X Indicating a Defining Sort

1	Ires1	0.6639X	54	Jres21	0.7160X	107	Hres10	0.6933X
2	Ires2	0.7593X	55	Jres22	0.6785X	108	Hres11	0.6549X
3	Ires3	0.4625	56	Jres23	0.7639X	109	Hres12	0.4556
4	Ires4	0.6094X	57	Jres24	0.6955X	110	Hres13	0.6717X
5	Ires5	0.4900	58	Cres1	0.5711X	111	Hres14	0.3503
6	Ires6	0.6666X	59	Cres2	0.7457X	112	Dres1	0.7114X
7	Ires7	0.4981	60	Cres3	0.5063X	113	Dres2	0.7512X
8	Ires8	0.7527X	61	Cres4	0.6920X	114	Dres3	0.7626X
9	Ires9	0.6518X	62	Cres5	0.6101X	115	Dres4	0.5784X
10	Ires10	0.2227	63	Cres6	0.6666X	116	Dres5	0.6177X
11	Ares1	0.7575X	64	Cres7	0.6960X	117	Dres6	0.7073X
12	Ares2	0.8150X	65	Cres8	0.5228X	118	Dres7	0.5238X
13	Ares3	0.7558X	66	Cres9	0.7871X	119	Dres8	0.5385X
14	Ares4	0.6360X	67	Gres1	0.6082X	120	Dres9	0.7573X
15	Ares5	0.5611X	68	Gres2	0.6695X	121	Dres10	0.7867X
16	Ares6	0.6648X	69	Gres3	0.7342X	122	Dres11	0.3469
17	Ares7	0.5795X	70	Gres4	0.6597X	123	Dres12	0.7735X
18	Ares8	0.6647X	71	Gres5	0.7803X	124	Dres13	0.4665
19	Ares9	0.6151X	72	Gres6	0.6100X	125	Dres14	0.7672X
20	Ares10	0.6304X	73	Gres7	0.4659	126	Dres15	0.6319X
21	Kres1	0.7062X	74	Gres8	0.6587X	127	Dres16	0.7013X
22	Kres2	0.5669X	75	Gres9	0.5709X	128	Fres1	0.4054
23	Kres3	0.4620	76	Gres10	0.6377X	129	Fres2	0.5629X
24	Kres4	0.6459X	77	Gres11	0.3462	130	Fres3	0.6408X
25	Kres5	0.6334X	78	Gres12	0.5771X	131	Fres4	0.7504X
26	Kres6	0.4838	79	Cres13	0.6274X	132	Fres5	0.4307
27	Kres7	0.6619X	80	Bres1	0.6366X	133	Fres6	0.6336X
28	Kres8	0.6589X	81	Bres2	0.5557X	134	Fres7	0.5671X
29	Kres9	0.6613X	82	Bres3	0.6032X	135	Fres8	0.6294X
30	Kres10	0.8265X	83	Bres4	0.5081X	136	Fres9	0.7293X
31	Kres11	0.6132X	84	Bres5	0.6473X	137	Fres10	0.5783X
32	Kres12	0.4977	85	Bres6	0.6985X	138	Fres11	0.5878X
33	Kres13	0.5072X	86	Bres7	0.6894X	139	Fres12	0.5038X
34	Jres1	0.7390X	87	Bres8	0.6316X	140	Fres13	0.5146X
35	Jres2	0.5273X	88	Bres9	0.4795	141	Fres14	0.5850X
36	Jres3	0.6538X	89	Bres10	0.7876X	142	Fres15	0.8238X
37	Jres4	0.8038X	90	Bres11	0.7209X	143	Fres16	0.6145X
38	Jres5	0.5413X	91	Bres12	0.6306X	144	Fres17	0.3404
39	Jres6	0.7139X	92	Bres13	0.6722X	145	Fres18	0.6027X
40	Jres7	0.7644X	93	Bres14	0.5869X	146	Fres19	0.6056X
41	Jres8	0.7375X	94	Bres15	0.6034X	147	Fres20	0.2602
42	Jres9	0.6576X	95	Bres16	0.7289X	148	Fres21	0.6342X
43	Jres10	0.5632X	96	Bres17	0.3718	149	Eres1	0.7365X
44	Jres11	0.4551	97	Bres18	0.5164X	150	Eres2	0.7005X
45	Jres12	0.7405X	98	Hres1	0.8212X	151	Eres3	0.6125X
46	Jres13	0.6984X	99	Hres2	0.6351X	152	Eres4	0.6185X
47	Jres14	0.6218X	100	Hres3	0.6934X	153	Eres5	0.5376X
48	Jres15	0.8557X	101	Hres4	0.6827X	154	Eres6	0.6125X
49	Jres16	0.6081X	102	Hres5	0.7188X	155	Eres7	0.4152
50	Jres17	0.4494	103	Hres6	0.6913X	156	Eres8	0.6072X
51	Jres18	0.8814X	104	Hres7	0.7177X	157	Eres9	0.5091X
52	Jres19	0.5405X	105	Hres8	0.7193X	Expl.Var.		41%
53	Jres20	0.6262X	106	Hres9	0.7565X			

## Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
35	34	38	13	36	45	23	40	48	14	28	24	17
32	26	3	33	20	22	39	29	42	5	16	31	1
		49	37	2	19	7	44	15	6	21		
			47	12	41	9	25	10	27			
				18	46	30	8	4				
					50	11	43					



## RH Site A – Single Factor

### Factor Matrix with an X Indicating a Defining Sort

A Res1 0.7419X  
 A Res2 0.8706X  
 A Res3 0.8358X  
 A Res4 0.7043X  
 A Res5 0.5762X  
 A Res6 0.5164X  
 A Res7 0.5920X  
 A Res8 0.7079X  
 A Res9 0.6816X  
 A Res10 0.5549X

Expl.Var. 47%

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
26	32	33	13	43	45	7	4	48	21	24	28	17
35	34	38	47	23	18	20	30	16	27	31	6	1
		37	2	50	11	46	29	25	42	5		
			12	49	3	19	8	15	14			
				41	39	10	40	22				
					36	44	9					

## RH Site B – Single Factor

### Factor Matrix with an X Indicating a Defining Sort

B Res1 0.6885X  
 B Res2 0.6301X  
 B Res3 0.5447X  
 B Res4 0.6140X  
 B Res5 0.6174X  
 B Res6 0.6504X  
 B Res7 0.7289X  
 B Res8 0.7367X  
 B Res9 0.5033X  
 B Res10 0.8401X  
 B Res11 0.7233X  
 B Res12 0.6174X  
 B Res13 0.6615X  
 B Res14 0.5993X  
 B Res15 0.6309X  
 B Res16 0.7300X  
 B Res17 0.3904  
 B Res18 0.5426X

Expl.Var. 41%

**Factor Array**

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	26	46	37	18	13	43	14	39	5	17	21	31
35	34	3	20	41	2	40	4	10	8	48	1	16
		38	49	22	7	29	25	44	6	24		
			12	47	45	36	15	42	27			
				33	30	11	19	28				
					50	9	23					

**RH Site C – Single Factor**

**Factor Matrix with an X Indicating a Defining Sort**

C Res1            0.6648X  
 C Res2            0.8062X  
 C Res3            0.4305  
 C Res4            0.7505X  
 C Res5            0.7702X  
 C Res6            0.7144X  
 C Res7            0.7454X  
 C Res8            0.5308X  
 C Res9            0.7048X

Expl.Var.        48%

**Factor Array**

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	35	38	37	8	47	50	18	6	13	28	16	24
26	34	2	19	46	10	44	20	4	14	15	1	17
		33	3	41	11	48	30	42	31	21		
			12	36	43	7	22	5	27			
				49	23	9	29	40				
					45	25	39					

## RH Site D – Single Factor

### Factor Matrix with an X Indicating a Defining Sort

D Res1 0.6992X  
 D Res2 0.8007X  
 D Res3 0.8152X  
 D Res4 0.6028X  
 D Res5 0.6284X  
 D Res6 0.6860X  
 D Res7 0.5439X  
 D Res8 0.5857X  
 D Res9 0.7858X  
 D Res10 0.7227X  
 D Res11 0.3670  
 D Res12 0.8000X  
 D Res13 0.5439X  
 D Res14 0.7827X  
 D Res15 0.5996X  
 D Res16 0.7038X

Expl.Var. 46%

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
38	26	13	33	45	18	4	25	46	48	21	1	17
35	32	34	2	50	43	44	6	5	31	16	28	24
		3	49	20	39	29	7	40	9	27		
			36	37	11	12	42	8	14			
				47	22	30	10	15				
					19	41	23					

## RH Site E – Single Factor

### Factor Matrix with an X Indicating a Defining Sort

E Res1 0.6859X  
 E Res2 0.8350X  
 E Res3 0.7512X  
 E Res4 0.6906X  
 E Res5 0.6344X  
 E Res6 0.7512X  
 E Res7 0.5365X  
 E Res8 0.5968X  
 E Res9 0.4423

Expl.Var. 45%

**Factor Array**

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
35	38	32	47	39	4	5	21	29	42	28	16	1
34	3	13	9	22	11	19	30	14	15	31	24	2
		26	20	48	45	25	40	6	17	27		
			49	37	7	41	46	44	10			
				18	43	33	8	50				
					23	36	12					

**RH Site F – Single Factor**

**Factor Matrix with an X Indicating a Defining Sort**

F Res1	0.4943
F Res2	0.6742X
F Res3	0.6510X
F Res4	0.7908X
F Res5	0.5372X
F Res6	0.6412X
F Res7	0.5262X
F Res8	0.6956X
F Res9	0.7832X
F Res10	0.5760X
F Res11	0.5946X
F Res12	0.4674
F Res13	0.4668
F Res14	0.6578X
F Res15	0.7933X
F Res16	0.6423X
F Res17	0.3998
F Res18	0.6770X
F Res19	0.6477X
F Res20	0.4198
F Res21	0.7265X

Expl.Var. 39%

**Factor Array**

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
35	34	37	46	30	12	27	50	41	1	31	14	17
32	38	3	33	36	43	29	15	44	42	16	5	24
		26	49	20	40	23	18	28	39	6		
			13	11	8	9	4	21	2			
				47	19	48	10	22				
					45	25	7					

## RH Site G – Single Factor

### Factor Matrix with an X Indicating a Defining Sort

G Res1 0.5747X  
 G Res2 0.4848  
 G Res3 0.6720X  
 G Res4 0.7603X  
 G Res5 0.7717X  
 G Res6 0.6322X  
 G Res7 0.5278X  
 G Res8 0.6754X  
 G Res9 0.6720X  
 G Res10 0.6566X  
 G Res11 0.4285  
 G Res12 0.6434X  
 G Res13 0.6808X

Expl.Var. 41%

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
35	38	49	50	2	41	25	48	9	16	12	31	1
32	3	34	20	13	19	23	45	27	4	28	14	17
		26	46	18	7	6	43	29	21	24		
			47	37	30	22	42	5	15			
				33	39	11	10	44				
					36	40	8					

## RH Site H – Single Factor

### Factor Matrix with an X Indicating a Defining Sort

H Res1 0.7155X  
 H Res2 0.6298X  
 H Res3 0.7742X  
 H Res4 0.7553X  
 H Res5 0.7844X  
 H Res6 0.7113X  
 H Res7 0.7645X  
 H Res8 0.6609X  
 H Res9 0.8037X  
 H Res10 0.6501X  
 H Res11 0.6334X  
 H Res12 0.5365X  
 H Res13 0.6840X  
 H Res14 0.4309

Expl.Var. 47%

**Factor Array**

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	34	26	18	41	22	8	11	15	10	31	21	17
35	3	13	49	37	44	12	7	5	28	16	48	1
		38	47	33	19	27	29	23	6	42		
			20	36	30	4	9	14	24			
				2	45	46	40	25				
					50	39	43					

**RH Site I – Single Factor**

**Factor Matrix with an X Indicating a Defining Sort**

I Res1	0.5965X
I Res2	0.7639X
I Res3	0.4399
I Res4	0.7028X
I Res5	0.6347X
I Res6	0.6672X
I Res7	0.5240X
I Res8	0.7422X
I Res9	0.7871X
I Res10	0.2262

Expl.Var. 40%

**Factor Array**

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
34	13	12	47	30	23	8	40	48	27	4	15	24
32	35	26	2	29	41	44	42	10	21	31	1	17
		36	49	38	11	45	39	5	16	28		
			18	33	22	9	25	14	6			
				20	37	50	43	46				
					3	19	7					

## RH Site J – Single Factor

### Factor Matrix with an X Indicating a Defining Sort

J Res1	0.7441X	J Res14	0.6267X
J Res2	0.5635X	J Res15	0.8410X
J Res3	0.7053X	J Res16	0.5812X
J Res4	0.8202X	J Res17	0.8861X
J Res5	0.5076X	J Res18	0.4746
J Res6	0.6836X	J Res19	0.5973X
J Res7	0.7635X	J Res20	0.5937X
J Res8	0.7526X	J Res21	0.7281X
J Res9	0.7281X	J Res22	0.7054X
J Res10	0.5505X	J Res23	0.7041X
J Res11	0.4431	J Res24	0.7392X
J Res12	0.7504X		
J Res13	0.6777X	Expl.Var.	47%

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
26	3	49	37	22	46	29	40	16	27	31	28	17
32	35	34	13	50	4	39	7	42	21	48	24	1
		38	2	12	18	45	25	43	5	6		
			47	36	41	19	8	10	14			
				33	11	30	44	23				
					20	9	15					

## RH Site K – Single Factor

### Factor Matrix with an X Indicating a Defining Sort

K Res1	0.7281X	K Res9	0.6844X
K Res2	0.5443X	K Res10	0.7984X
K Res3	0.5969X	K Res11	0.6304X
K Res4	0.7458X	K Res12	0.4733
K Res5	0.7237X	K Res13	0.5151X
K Res6	0.5821X		
K Res7	0.5785X	Expl.Var.	42%
K Res8	0.7040X		

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	36	49	12	30	25	45	50	21	29	17	28	24
35	26	38	3	2	11	22	39	16	14	5	31	27
		34	33	15	20	23	48	42	4	1		
			13	46	9	46	7	6	40			
				37	19	10	18	44				
					43	41	8					

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## **Appendix 17**

# **Single Centroid Perspectives of Other (Non-Resident) Participants for Extra Care and Retirement Housing**

*Assessments of front-line staff, site managers, senior management and external opinion shapers based on their assumed preferences of residents of Extra Care and Retirement Housing*

## EC Others – Site Managers and Others (Single Factor)

### Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
1	100	72	54	64	65	62	71	45	63	66	61	62	63	57	44	61	70
2	72	100	57	59	53	58	67	45	55	64	53	47	54	44	44	51	64
3	54	57	100	49	42	38	52	33	48	43	43	43	51	36	25	37	47
4	64	59	49	100	64	69	77	57	64	73	73	77	71	63	46	70	54
5	65	53	42	64	100	67	69	51	67	56	55	54	51	59	42	49	68
6	62	58	38	69	67	100	75	52	67	66	73	73	68	69	56	76	52
7	71	67	52	77	69	75	100	53	63	62	63	67	60	45	40	64	53
8	45	45	33	57	51	52	53	100	56	58	51	54	49	52	37	51	36
9	63	55	48	64	67	67	63	56	100	56	55	57	59	58	48	61	65
10	66	64	43	73	56	66	62	58	56	100	71	70	65	65	42	70	56
11	61	53	43	73	55	73	63	51	55	71	100	72	55	59	44	59	53
12	62	47	43	77	54	73	67	54	57	70	72	100	68	65	46	79	50
13	63	54	51	71	51	68	60	49	59	65	55	68	100	59	55	76	55
14	57	44	36	63	59	69	45	52	58	65	59	65	59	100	51	65	54
15	44	44	25	46	42	56	40	37	48	42	44	46	55	51	100	46	49
16	61	51	37	70	49	76	64	51	61	70	59	79	76	65	46	100	49
17	70	64	47	54	68	52	53	36	65	56	53	50	55	54	49	49	100

### Factor Matrix with an X Indicating a Defining Sort

1	0.8143X
2	0.7315X
3	0.5681X
4	0.8588X
5	0.7543X
6	0.8505X
7	0.8145X
8	0.6371X
9	0.7799X
10	0.8157X
11	0.7776X
12	0.8176X
13	0.7952X
14	0.7431X
15	0.5824X
16	0.7987X
17	0.7205X
Expl.Var.	58%

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	34	3	33	13	9	7	27	5	10	48	31	51
26	35	2	12	41	18	14	16	46	28	24	21	17
		38	49	36	53	23	45	40	6	1		
			20	22	50	4	8	19	30			
				37	15	25	42	29				
					47	11	44					
					54	39	52					
						43						

## EC Others – Other Site Managers (Single Factor)

### Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7	8	9	10	11
1	100	60	70	54	68	68	58	63	62	66	71
2	60	100	53	58	58	44	57	61	56	47	54
3	70	53	100	70	49	57	49	65	49	55	60
4	54	58	70	100	47	47	61	64	38	52	54
5	68	58	49	47	100	55	60	64	60	64	59
6	68	44	57	47	55	100	46	55	65	42	68
7	58	57	49	61	60	46	100	71	45	62	62
8	63	61	65	64	64	55	71	100	58	54	61
9	62	56	49	38	60	65	45	58	100	58	63
10	66	47	55	52	64	42	62	54	58	100	61
11	71	54	60	54	59	68	62	61	63	61	100

### Factor Matrix with an X Indicating a Defining Sort

1	0.8518X
2	0.7171X
3	0.7560X
4	0.7134X
5	0.7683X
6	0.7159X
7	0.7495X
8	0.8176X
9	0.7249X
10	0.7351X
11	0.8131X

Expl.Var. 58%

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
34	32	12	37	2	11	9	43	40	6	51	31	17
26	35	38	49	14	47	25	8	7	27	21	48	1
		3	36	41	50	5	16	10	28	24		
			33	20	22	44	45	30	46			
				54	4	15	29	19				
					13	53	39					
					42	23	52					
						18						

## EC Others – EC Management (Single Factor)

### Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7
1	100	65	73	71	70	70	50
2	65	100	75	73	52	75	56
3	73	75	100	73	64	72	60
4	71	73	73	100	66	67	55
5	70	52	64	66	100	54	42
6	70	75	72	67	54	100	63
7	50	56	60	55	42	63	100

### Factor Matrix with an X Indicating a Defining Sort

1	0.8359X
2	0.8299X
3	0.8820X
4	0.8550X
5	0.7100X
6	0.8397X
7	0.6604X

Expl.Var. 65%

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
34	26	3	12	42	15	23	28	8	30	21	51	17
32	35	38	2	20	7	45	19	5	27	6	48	31
		33	49	50	18	39	46	16	1	10		
			36	54	11	4	44	24	29			
				37	47	41	43	14				
					25	13	52					
						53	9	40				
								22				

## EC Others – External Opinion Shapers (Single Factor)

### Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6
1	100	71	35	39	53	48
2	71	100	32	45	63	45
3	35	32	100	21	23	39
4	39	45	21	100	17	49
5	53	63	23	17	100	31
6	48	45	39	49	31	100

### Factor Matrix with an X Indicating a Defining Sort

1	0.8050X
2	0.8538X
3	0.4383
4	0.5116X
5	0.5715X
6	0.6661X

Expl.Var. 43%

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
26	38	36	49	22	16	29	30	18	46	27	8	51
32	34	35	15	12	20	45	23	40	5	48	24	1
		3	42	11	13	25	19	52	31	17		
			37	33	2	41	4	28	14			
				53	50	10	47	44				
					39	7	9					
					54	6	43					
						21						

## RH Others – Site Court Managers and Others (Single Factor)

### Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
1	100	66	71	45	55	61	40	67	68	67	59	55	41	65	52	54
2	66	100	63	43	62	61	41	69	80	69	50	60	54	69	46	60
3	71	63	100	60	70	56	59	79	63	72	64	68	63	64	58	58
4	45	43	60	100	53	43	54	44	40	49	45	38	38	41	47	49
5	55	62	70	53	100	65	61	73	59	68	56	66	66	59	52	61
6	61	61	56	43	65	100	63	74	61	76	65	64	55	70	63	70
7	40	41	59	54	61	63	100	57	42	66	53	57	55	45	55	72
8	67	69	79	44	73	74	57	100	70	83	72	81	73	67	67	69
9	68	80	63	40	59	61	42	70	100	70	59	52	55	69	56	66
10	67	69	72	49	68	76	66	83	70	100	58	67	58	64	62	73
11	59	50	64	45	56	65	53	72	59	58	100	67	59	58	65	58
12	55	60	68	38	66	64	57	81	52	67	67	100	72	59	54	58
13	41	54	63	38	66	55	55	73	55	58	59	72	100	46	52	54
14	65	69	64	41	59	70	45	67	69	64	58	59	46	100	67	55
15	52	46	58	47	52	63	55	67	56	62	65	54	52	67	100	77
16	54	60	58	49	61	70	72	69	66	73	58	58	54	55	77	100

### Factor Matrix with an X Indicating a Defining Sort

1	0.7436X
2	0.7672X
3	0.8366X
4	0.5814X
5	0.7972X
6	0.8182X
7	0.7012X
8	0.9071X
9	0.7839X
10	0.8692X
11	0.7632X
12	0.7910X
13	0.7194X
14	0.7699X
15	0.7492X
16	0.8050X

Expl.Var. 61%

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	38	33	49	50	43	4	42	8	48	6	1	17
26	35	3	47	12	11	39	40	16	14	21	28	31
		34	2	36	41	45	7	30	24	5		
			20	18	25	15	19	23	27			
				37	22	10	46	44				
					13	29	9					

## RH Others – RH Management (Single Factor)

### Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7	8
1	100	81	77	70	59	82	67	70
2	81	100	79	68	59	82	56	57
3	77	79	100	68	64	79	62	56
4	70	68	68	100	50	74	57	54
5	59	59	64	50	100	55	46	54
6	82	82	79	74	55	100	62	60
7	67	56	62	57	46	62	100	72
8	70	57	56	54	54	60	72	100

### Factor Matrix with an X Indicating a Defining Sort

1	0.9132X
2	0.8626X
3	0.8681X
4	0.7759X
5	0.6676X
6	0.8892X
7	0.7384X
8	0.7411X

Expl.Var. 66%

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
26	38	33	36	11	50	41	27	21	48	1	6	17
32	35	49	2	47	45	10	22	14	24	46	16	31
		34	37	12	42	29	8	40	5	4		
			3	20	9	25	39	28	23			
				13	15	7	44	19				
					43	18	30					

## RH Others – External Opinion Shapers (Single Factor)

### Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7
1	100	50	30	61	42	72	67
2	50	100	36	48	58	61	50
3	30	36	100	28	21	35	36
4	61	48	28	100	14	50	60
5	42	58	21	14	100	36	37
6	72	61	35	50	36	100	71
7	67	50	36	60	37	71	100

### Factor Matrix with an X Indicating a Defining Sort

1	0.8162X
2	0.7588X
3	0.4297
4	0.6315X
5	0.4824
6	0.8259X
7	0.8135X

Expl.Var. 49%

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
26	36	3	50	18	15	8	25	39	48	14	6	17
32	34	38	47	11	2	23	21	46	40	1	5	31
		35	12	13	20	42	16	4	24	44		
			49	29	37	19	7	27	28			
				33	43	10	22	41				
					45	9	30					



## **Appendix 18**

**Distribution of Factor Scores for Extra Care  
Sites 1-5 and Retirement Housing Sites A-K  
on a Statement by Statement Basis.**

#1 A court manager to turn to if you need help and advice

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	3	3	3	3	4	2	6	1	4	3	2	3	2	3	-	3	1	2
+6	F1 F4	F2	F2		F1 F3	F1		F2	F1 F3	F2	F2						F1	
+5			F1	F1			F3	F1		F1	F4		F1			F1	F2	F2
+4	F3					F2					F1 F3	F1	F2	F2		F2		
+3	F2	F1	F3							F3			F3					F1 F3
+2				F2	F2				F2					F1	F1	F3		
+1							F1					F2		F3				
0																		
-1							F2											
-2																		
-3																		
-4																		
-5																		
-6																		

#2 A resident manager or warden who lives on-site

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	9	4	6	2	4	4	10	2	8	1	4	1	4	2	-	3	0	1
+6						F1	F3		F3									
+5	F4																	
+4																		
+3															F1			
+2	F1		F2			F2												
+1			F1															
0					F3		F1			F2		F3				F1		
-1		F2						F1		F1		F2		F3				
-2									F1 F2	F2 F3		F1	F2	F2				F2
-3				F1	F1			F2			F3 F4			F1		F2 F3	F1/F2	F1 F3
-4	F2 F3		F3		F2		F2				F1		F1					
-5		F1		F2														
-6																		

#3 A court manager who is only employed on a part-time basis

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	4	6	4	1	3	4	4	1	2	2	3	2	2	5	-	2	2	0
+6																		
+5																		
+4																		
+3																		
+2		F1																
+1																		
0										F3				F3				
-1							F2											
-2		F2		F2 F3			F2			F1 F2		F2						
-3				F2	F2						F1		F2					
-4		F3 F4	F2		F1	F1		F1	F1	F2		F3 F4	F1		F1	F3	F2	F1 F2 F3
-5							F3	F2	F1				F1 F3	F1 F2				
-6		F1		F1		F3	F1			F3		F2				F1 F2	F1	

#4 Close to shops, amenities and transport

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	4	4	3	7	1	2	1	4	7	4	7	4	0	7	-	3	2	3
+6				F2														
+5										F1 F2		F1						
+4								F1	F2		F4							
+3		F4												F1				
+2		F2 F3		F1			F2				F1						F2	
+1			F1	F3		F1		F1 F3			F3	F3	F2		F1			F1
0					F2 F3	F1	F2	F2	F1							F1	F1	
-1		F1		F2	F1								F1 F2 F3			F3		F2
-2														F2				F3
-3			F2							F3		F2				F2		
-4															F3			
-5																		
-6																		

#5 No need to worry about maintenance and repairs

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	2	1	5	5	3	1	4	1	1	5	4	2	3	2	-	2	5	2
+6			F2				F2			F3								
+5											F3	F2						
+4	F2 F4			F1			F3										F2	
+3		F1			F3				F2 F3	F3	F1 F3	F1	F2	F1	F1	F1		
+2	F1 F3	F2	F3		F1		F1	F1	F1				F3			F2		
+1			F1					F2		F1	F2			F2 F3		F3		F1
0					F2	F1							F1					F2
-1				F2		F2											F1	F3
-2																		
-3																		
-4																		
-5																		
-6																		

#6 Repairs or problems are addressed and fixed quickly

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	3	2	3	1	5	4	4	3	1	2	3	0	4	3	-	2	1	4
+6																		
+5						F2												
+4	F1 F2	F1	F1				F2				F1 F2							
+3	F4				F3		F3	F2	F2	F1 F2	F3		F3	F2		F3		
+2		F2		F2	F1					F1 F3					F1	F2		F1
+1	F3		F2 F3	F1		F1				F3	F4	F1 F2	F2	F3		F1	F2	F2
0							F1	F1						F1			F1	
-1													F1					
-2					F2													F3
-3																		
-4																		
-5																		
-6																		

#7 The appearance of the Court creates a good impression

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	2	1	1	1	3	4	2	0	2	6	3	6	1	2	-	3	1	4
+6																		
+5																		
+4												F2						
+3					F2	F2					F4					F2		F3
+2									F2	F1 F2								
+1	F3 F4			F2			F3		F1		F1 F3		F1	F1		F3		F2
0		F1	F1 F2	F1	F1 F3		F1		F3		F2		F2 F3	F2	F1	F1	F1	
-1	F1 F2	F2	F3			F1	F2	F1 F2						F3			F2	F1
-2												F1						
-3																		
-4										F3								
-5																		
-6																		

#8 Companionship of neighbours so you are never lonely

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	6	3	2	2	3	1	3	3	6	3	3	1	4	5	-	2	0	2
+6																		
+5																		
+4	F3								F2					F3				
+3			F3		F2						F2							
+2	F1	F1	F2		F3					F1 F3			F2					
+1			F1	F2		F1	F1	F1			F4		F1	F2	F1	F1 F2		
0					F1	F2					F1 F3	F1					F1 F2	F3
-1	F4	F2		F1			F3			F2		F2		F1		F3		F1
-2	F2						F2	F2	F1 F3				F3					F2
-3																		
-4																		
-5																		
-6																		

#9 Use of a communal lounge and other shared facilities

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	4	1	1	1	3	4	2	2	4	3	8	1	4	5	-	2	3	3
+6																		
+5																		
+4																		
+3		F3			F1			F1	F2 F3					F3			F2	
+2		F1			F2	F2					F2		F2					
+1				F1			F1 F2	F2		F1 F3						F1		F2
0		F1	F1 F2		F3	F1				F4		F1		F1	F3	F1	F3	
-1		F2 F4	F2	F3			F3	F1			F1				F2			
-2										F2	F1	F2	F3	F1 F2			F1	
-3																		
-4					F2													
-5																		
-6										F3								

#10 Peace of mind that comes from being looked after

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	4	3	3	8	6	1	6	2	3	3	5	5	3	3	-	4	2	4
+6																		
+5									F2									
+4			F2		F2	F2			F3		F3		F2	F1		F3		
+3		F1		F1		F1	F3				F2					F1		F2
+2		F4	F2		F3			F1	F1	F1 F2		F1			F1			
+1		F3		F1 F3									F1 F3	F2 F3			F1	F3
0							F1	F2								F2		
-1		F2	F1							F3	F1 F4						F2	F1
-2					F1													
-3							F2					F2						
-4																		
-5				F2														
-6																		

#11 Living around people of a similar age and outlook

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	3	3	4	2	4	3	1	5	2	4	8	1	3	4	-	5	4	1
+6																		
+5																		
+4																	F2	
+3								F1			F1							
+2			F2		F2	F2								F3			F2	
+1	F3 F4	F2							F3			F1	F2	F1		F1		
0			F3	F2					F1	F1	F2	F2	F1					F3
-1	F1				F1	F1	F1 F2		F2	F3	F4					F3		F1 F2
-2	F2	F1	F1	F1	F3		F3	F2					F3	F2	F1		F1	
-3																		
-4									F2									
-5										F3								
-6																		

#12 Occupancy restricted to only retired people aged over 65

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	8	0	8	1	6	8	8	9	4	4	3	1	3	1	-	1	7	3
+6						F2	F1	F1										
+5	F4																	
+4			F2		F2													F2
+3																		
+2									F1									
+1																		
0									F3	F2	F1							
-1					F3		F3				F2		F2					
-2	F3			F2	F1	F1	F2		F2	F1		F2		F1 F2		F1 F2		F3
-3	F1 F2	F1 F2		F1				F2			F3 F4	F1	F1	F3		F3	F1	F2
-4			F1 F3							F3			F3					
-5															F1			F1
-6																		

#13 Residents are able to have, dogs, cats or other pets

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	5	6	11	7	1	2	2	2	1	3	7	1	5	4	-	5	5	5
+6			F3	F1														
+5																		
+4																		
+3		F2																
+2											F3 F4					F2		
+1	F2												F3					F1
0								F2										
-1				F2										F2			F1	
-2								F1			F1	F2	F1	F3	F1			
-3	F3 F4	F1	F1		F2 F3	F2	F3		F1	F3		F1				F1 F3		F2
-4	F1				F1		F2		F2 F3	F2			F2					F3
-5			F2			F1	F1				F2			F1				
-6										F1								F2

#14 Having security of tenure

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	5	2	3	4	3	5	2	4	4	5	5	5	4	6	-	7	3	5
+6				F2				F2			F1	F1		F2		F3		
+5	F2					F2				F3								
+4	F4	F1					F2		F1				F3	F1	F1			F1
+3			F2 F3				F1			F2			F1				F1	
+2	F3	F2		F1			F3	F1			F3 F4					F1		F3
+1					F1 F3			F2			F2	F2						
0	F1		F1			F1		F3	F1				F2	F3			F2	
-1																F2		F2
-2					F2													
-3																		
-4																		
-5																		
-6																		



#15 A communal laundry room with washers and dryers

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	1	0	2	1	4	5	1	4	3	2	2	5	3	4	-	8	0	3
+6																		
+5																F3		
+4						F1		F2		F1 F2								
+3				F1			F2											
+2	F2			F2	F1 F2		F1 F3		F1 F2	F3								
+1	F1 F3 F4	F1 F2	F2								F3 F4	F1	F3	F1	F1			F2
0			F3					F1			F1					F1		
-1			F1			F2			F3		F2		F2	F2			F1/F2	F3
-2					F3								F1					F1
-3														F3		F2		
-4												F2						
-5																		
-6																		

#16 An effective and efficient heating and hot water system

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	3	4	3	1	1	3	2	1	4	4	4	2	3	2	-	0	1	3
+6			F1															
+5	F1 F2	F1				F1	F3		F1				F3					
+4			F3	F1	F3		F1		F2	F3	F3							F1
+3			F2	F2	F1 F2		F2	F2				F2		F1 F2		F1 F2 F3		
+2	F3 F4					F2		F1		F1	F1 F2		F1 F2		F1			F2
+1		F2							F3			F1		F3			F1	F3
0										F2	F4						F2	
-1																		
-2																		
-3																		
-4																		
-5																		
-6																		

#17 Feeling safe and secure

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	3	2	5	1	4	3	1	1	1	4	1	2	4	5	-	1	4	1
+6	F2 F3	F1	F3		F2				F1 F2	F3	F1 F3 F4		F1 F2	F1 F3			F2	F1 F3
+5	F1			F2	F1			F1	F3		F2					F2 F3		F2
+4		F2	F1	F1			F1 F3	F2				F1			F1	F1		
+3	F4					F1	F2			F1							F1	
+2					F3					F2		F2	F3					
+1			F2											F2				
0						F2												
-1																		
-2																		
-3																		
-4																		
-5																		
-6																		

#18 A garden or balcony so you can sit out in private

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	4	2	5	2	5	2	4	1	2	4	3	6	2	4	-	3	2	1
+6																		
+5												F2						
+4																		
+3							F1											
+2			F3	F1										F1				
+1	F2				F2						F4							
0		F1		F2	F1		F3				F1 F3		F3			F2		F1 F3
-1	F3		F1			F2	F2	F2	F3	F2		F1	F1	F2	F1	F1	F2	F2
-2	F4	F2						F1	F1		F2		F2	F3				
-3	F1		F2			F1			F2	F1						F3	F1	
-4					F3													
-5										F3								
-6																		

#19 Social events and activities to get involved in

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	5	2	3	2	3	4	1	2	5	8	4	2	4	5	-	2	1	4
+6																		
+5																		
+4																		F3
+3											F2		F1 F2					
+2	F3										F3			F1		F1	F1	
+1			F2		F2	F1		F2	F2					F3		F2	F2	F1
0	F1	F2	F1		F1				F3	F1					F1	F3		F2
-1								F1			F1 F3 F4	F1	F3					
-2	F4	F1	F3	F2	F3		F1 F3											
-3	F2					F2	F2					F2		F2				
-4				F1					F1									
-5																		
-6										F2								

#20 Availability of a good internet connection and/or wifi

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	4	0	10	3	1	4	4	7	5	4	4	1	4	8	-	4	3	2
+6																		
+5			F3															
+4																		
+3				F2														
+2							F1	F2						F2		F2		
+1	F2						F2				F1	F1						
0				F1		F2						F2	F3			F3	F1	F1
-1	F3							F1 F3	F1	F3 F4			F1					F3
-2	F4	F1 F2			F1 F2		F3									F1		F2
-3	F1		F1		F3						F2				F1		F2	
-4						F1				F3			F2	F1				
-5			F2					F1		F2								
-6									F2					F3				

#21 Pull-cord or pendant to summon help in an emergency

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	5	4	5	2	5	1	2	3	4	2	7	6	3	4	-	4	2	6
+6	F1	F1	F1		F1						F2 F3			F1 F3		F1		F2
+5									F3	F2		F1	F2					
+4					F2				F1	F3							F2	
+3	F3		F2				F1	F1		F1					F1	F2		
+2	F4	F2		F1		F1							F1 F3	F2		F3	F1	F3
+1	F2		F3		F3	F2	F2 F3		F2									
0				F2				F2			F4							F1
-1											F1	F2						
-2																		
-3																		
-4																		
-5																		
-6																		

#22 Sufficient car parking spaces

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	4	2	5	1	6	3	8	2	6	2	1	5		2	-	4	1	6
+6							F1											
+5																		
+4																		
+3					F1				F1			F2						F1
+2	F2	F1	F3				F2											
+1						F2			F3				F3					
0		F2		F1				F1		F2				F2 F3	F1	F3		
-1	F1 F3			F2						F1	F1 F2 F3					F1	F1	
-2	F4		F1			F1	F3	F2		F3	F4	F1		F1			F2	
-3			F2		F2 F3				F2				F1 F2					F2 F3
-4																F2		
-5																		
-6																		

#23 Community spirit and friendship with people of a similar age and outlook

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	5	7	3	1	5	1	3	2	4	6	5	3	2	5	-	3	1	3
+6																		
+5																		
+4									F3		F4							
+3		F3	F2		F2					F3						F2		F3
+2			F2				F1				F1	F2	F1	F3			F1	
+1							F2	F1	F2		F2		F2			F1	F2	
0		F1 F4	F3	F2					F1				F3	F2	F1	F3		F1 F2
-1			F1	F1	F1	F1	F3	F2		F1	F3	F1						
-2		F2			F3	F2												
-3										F2				F1				
-4		F1																
-5																		
-6																		

#24 You have your own home with your own front door

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	3	2	1	1	2	1	1	5	7	6	2	2	3	1	-	5	5	2
+6		F2 F3 F4		F1	F2		F2 F3	F1		F1 F2		F2	F3		F1	F3	F1	F1
+5				F2			F1		F2		F1 F4		F1					F3
+4		F2			F1 F3	F1					F1							F2
+3		F1		F1 F2		F2			F1		F2 F3		F2	F1 F2				
+2			F1	F3										F3		F1		
+1							F2									F2	F2	
0									F3									
-1																		
-2									F3									
-3																		
-4																		
-5																		
-6																		

#25 In a nice area with attractive surroundings

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	1	1	5	1	1	4	3		3	3	2	1	2	2	-	1	3	1
+6																		
+5																		
+4						F2												
+3			F1				F1		F1									
+2					F3				F3		F4			F3				F3
+1		F3	F1	F3		F1 F2		F1		F1	F3		F1 F2				F2	F1 F2
0		F1 F2 F4	F2			F1	F2 F3	F2	F2	F2	F1 F2	F1		F1 F2		F3		
-1				F1								F2	F3		F1	F1 F2		
-2			F2	F2						F3								F1
-3																		
-4																		
-5																		
-6																		

#26 Being seen as a form of care home

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	2	1	2	1	2	0	3	0	1	6	4	1	1	1	-	2	2	0
+6																		
+5																		
+4																		
+3																		
+2									F2									
+1																		
0																		
-1																		
-2											F3			F2		F3		
-3							F3		F2 F3	F3			F2	F1 F2		F1		
-4		F1 F4		F1 F2		F3	F1 F2	F1	F1 F2	F1	F1		F1 F3			F2	F2	
-5		F3	F2		F1	F2						F2 F4	F1		F1			F1 F2 F3
-6		F2	F1	F3	F2	F1		F2				F1	F2				F1	

#27 Freedom to live as you choose: no requirement to join in or conform

RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
4	1	6	2	4	4	2	0	3	4	4	3	3	4	-	5	2	4
+6											F1				F2		
+5		F1	F2		F2												F1
+4	F3	F2			F1				F1	F1		F1	F2				
+3	F2		F3	F1						F4	F2					F2	
+2	F4					F1	F1 F2						F1		F1		F2
+1			F2	F1 F3				F1	F2	F2		F2 F3		F1	F3	F1	F3
0	F1				F2	F2 F3			F3	F3			F3				
-1			F1					F2									
-2								F3									
-3																	
-4																	
-5																	
-6																	

#28 Independent living

RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
3	1	3	4	2	5	5	1	3	1	3	4	6	6	-	6	3	4
+6					F2						F2	F1			F2		F3
+5	F3	F2		F1	F2		F1	F2		F2			F2			F1	
+4	F2 F4	F1			F3		F1	F1	F2	F4							F2
+3				F1					F1 F3	F1		F3			F3		
+2	F1		F3					F3		F3	F1					F2	F1
+1			F2		F1			F2						F1			
0		F2				F2 F3						F2	F3		F1		
-1		F1											F1				
-2																	
-3																	
-4																	
-5																	
-6																	

#29 Able to have your say and raise matters with senior management

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	1	0	3	1	5	4	4	0	3	2	6	0	3	1	-	3	6	4
+6																		
+5																	F1	
+4					F1													F3
+3						F1		F1 F2			F1	F1 F2	F1					F1
+2			F1 F2	F1			F2 F3										F2	
+1	F1 F2 F4	F1 F2		F2					F1				F3				F1	
0	F3				F3				F2		F2		F2	F1 F3	F1			F2
-1			F3		F2	F2				F2 F3	F3			F2		F3	F2	
-2							F1		F3									
-3										F1	F4							
-4																		
-5																		
-6																		

#30 Residents are engaged and able to exercise choice and control

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	1	4	2	2	4	3	3	5	3	5	3	2		5	-	1	0	6
+6																		
+5																		
+4														F3				F3
+3		F2		F2	F3			F2										
+2						F1					F3		F1 F2					F1
+1				F1			F2		F3		F1							
0	F2 F3		F3				F1			F3		F1			F1	F1 F3	F1 F2	
-1	F1 F4	F1	F2		F1 F2	F2			F1		F2 F4		F3	F1 F2		F2		
-2			F1				F3	F1	F2	F1		F2						F2
-3																		
-4																		
-5									F2									
-6																		



#31 Residents are treated with dignity and respect

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	2	2	1	2	3	7	3	1	5	5	5	1	1	3	-	2	1	3
+6									F2	F1	F4							
+5	F3	F2	F3		F3	F1		F2			F1		F2 F3	F3	F1	F1	F2	
+4	F1		F1 F2				F1	F1				F2	F1	F2			F1	F2
+3	F2 F4	F1		F2						F3		F1				F2 F3		
+2					F1 F2		F2		F2		F2			F1				F1
+1				F1			F3		F1	F2	F3							F3
0																		
-1																		
-2						F2												
-3																		
-4																		
-5																		
-6																		

#32 Some other residents behave badly

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	0	1	1	2	0	4	1	0	3	6	3	1	1	0	-	2	0	1
+6																		
+5																		
+4																		
+3																		
+2																		
+1																		
0										F2								
-1						F1												
-2																		
-3									F1		F3							
-4				F2												F2		
-5		F1	F1		F1 F2 F3	F2	F2				F1	F2	F1				F1 F2	F2 F3
-6	F1 F2 F3 F4	F2	F2 F3	F1			F1 F3	F1 F2	F2 F3	F1 F3	F2 F4	F1	F2 F3	F1 F2 F3	F1	F1 F3		F1

#33 Residents who take control and assume responsibility for organising things

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	2	0	2	1	1	2	1	2	2	1	3	1	4	3	-	4	5	4
+6																		
+5																		
+4																		
+3																	F1	
+2																		F3
+1						F1							F1					
0																F2		
-1			F2			F2		F2		F2		F2	F2			F1		F1
-2	F1 F4		F1		F2 F3		F2	F1			F1	F1		F1 F3			F2	F2
-3	F3	F1 F2	F3	F2	F1		F1 F3		F1 F3	F1 F2		F2	F3		F1			
-4	F2			F1				F2		F3	F3 F4					F3		
-5														F2				
-6																		

#34 People don't respect privacy or confidentiality

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	1	2	2	1	1	0	3	1	1	5	4	1	1	0	-	1	1	0
+6																		
+5																		
+4																		
+3																		
+2																		
+1																		
0																		
-1									F2									
-2											F3 F4							
-3							F1				F2							
-4	F3	F1	F2		F1 F2		F2	F1	F2			F2		F1 F2 F3	F1		F1	
-5	F1 F2 F4		F1 F3	F1	F3			F2	F1 F3	F1		F1	F2 F3			F1 F2	F2	
-6		F2		F2		F1 F2	F3			F3	F1		F1			F3		F1 F2 F3

#35 Gossip spreads quickly

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	1	2	1	3	2	2	2	0	2	3	3	1	1	2	-	1	2	2
+6																		
+5																		
+4																		
+3																		
+2																		
+1																		
0																		
-1																		
-2										F2								
-3				F2							F1							
-4		F2			F3	F1	F3		F3		F2 F3			F1			F1	F1
-5	F1 F2		F3		F1		F2		F2	F1 F3		F2	F2	F3		F1 F3		
-6	F3 F4	F1	F1 F2	F1	F2	F2	F1	F1 F2	F1		F4	F1	F1 F3	F2	F1	F2	F2	F2 F3

#36 Residents with dementia or who need to be looked after

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	2	1	3	1	5	4	8	0	4	3	7	2	3	4	-	2	3	5
+6																		
+5							F2											
+4																		
+3						F2				F3				F3				
+2									F3									F2
+1			F2											F1			F1	
0		F2	F1										F2					
-1	F4	F1		F1	F2 F3	F1		F1 F2		F3				F2				
-2	F1 F2		F3	F2					F1 F2		F2 F4		F1			F2 F3	F2	
-3	F3						F1 F3						F3		F1			F1 F3
-4									F1 F2	F1	F1					F1		
-5																		
-6					F1							F2						

#37 Living in close proximity to others in a compact community

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	3	5	2	6	3	2	1	1	3	3	7	2	2	3	-	3	1	1
+6																		
+5																		
+4																		
+3																		
+2				F2														
+1		F2			F3						F4							
0									F2	F1				F1 F3				
-1	F3		F3			F1				F3		F2	F2			F1		
-2	F2		F2		F1 F2			F1	F3		F2						F1	F1
-3	F4		F1			F2	F2	F2	F1	F2		F1	F1 F3	F2	F1	F2	F2	F2 F3
-4	F2	F1		F1			F1 F3				F1					F3		
-5																		
-6											F3							

#38 Small flats

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	2	3	1	1	3	1	2	1	1	1	1	1	2	2	-	1	1	2
+6																		
+5																		
+4																		
+3																		
+2																		
+1																		
0																		
-1																		
-2		F1								F1								F3
-3	F2		F2	F1	F1 F3					F2 F3		F2						
-4	F1		F1 F3	F2		F2	F3	F2			F2	F1	F1 F3	F2	F1	F1	F2	F1 F2
-5	F3 F4	F2				F1	F1	F1	F2 F3		F1 F3 F4			F3		F2 F3	F1	
-6					F2		F2		F1				F2	F1				

#39 Properties and facilities that are modern and well-designed

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	2	0	4	1	2	1	6	2	1	3	4	3	1	3	-	1	1	1
+6																		
+5							F2											
+4																		
+3			F1				F3											
+2										F3 F4	F2			F2				
+1	F2			F1	F2			F2		F1 F2								F2 F3
0	F3		F3	F2	F3			F2		F1			F1 F3	F1		F1 F3		F1
-1	F1 F4	F1 F2	F2		F1		F1	F1	F1 F3			F1	F2	F3	F1	F2	F1	
-2						F1				F3	F2							F2
-3						F2												
-4																		
-5																		
-6																		

#40 Buildings and gardens that are kept clean and tidy

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	2	2	4	2	3	0	2	0	3	3	2	4	1	2	-	1	0	2
+6																		
+5																		
+4				F2								F2						
+3					F3					F2								
+2	F2		F1	F1					F2	F1	F1 F4							F2
+1	F1	F1			F1	F1 F2	F2				F2			F1			F1 F2	F3
0	F3 F4		F3		F2		F3		F1	F3	F3	F1	F1 F2	F3		F2		F1
-1		F2					F1	F1 F2	F3				F3	F2	F1	F1 F3		
-2			F2															
-3																		
-4																		
-5																		
-6																		

#41 Contemporary kitchens and bathrooms

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	2	1	2	1	2	3	2	2	4	4	2	1	2	5	-	2	2	0
+6																		
+5																		
+4																		
+3						F2	F2											
+2							F3	F2										
+1					F3		F1			F2		F2		F2		F3		
0	F2 F4					F1		F1	F2		F4	F1	F3				F2	
-1			F1	F2	F1 F2				F1	F1	F1		F1			F1 F2		F1 F2 F3
-2	F1 F3	F2	F2	F1							F2 F3		F2		F1		F1	
-3		F1	F3							F3				F1				
-4									F3					F3				
-5																		
-6																		

#42 Checks on fire, electrical, gas, asbestos and water safety

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	4	0	2	3	6	3	5	4	4	6	7	2	1	2	-	1	3	3
+6					F3													
+5									F1		F3							
+4				F2			F3	F2		F3							F1	
+3	F1 F2	F1 F2	F1			F1						F1		F2 F3				F2
+2							F2		F2		F1 F2		F2 F3			F3		
+1	F4		F2 F3	F1					F3			F2	F1	F1	F1	F1 F2	F2	
0					F1 F2	F2		F1		F1								F1 F3
-1	F3						F1											
-2										F2	F4							
-3																		
-4																		
-5																		
-6																		

#43 Everyone is kept informed and up to date about local plans and activities

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	2	2	6	3	1	3	4	0	2	2	6	1	2	2	-	3	3	5
+6																		
+5			F2															F3
+4											F2							
+3																		
+2							F2						F1				F2	
+1	F1 F4		F1	F2		F2	F3	F1 F2	F1	F1 F3	F1		F3	F1	F1	F2 F3		F2
0	F3	F2			F1 F2				F3			F2	F2	F2				F1
-1	F2		F3		F3				F2	F2	F4	F1		F3			F1	
-2		F1		F1		F1	F1				F3					F1		
-3																		
-4																		
-5																		
-6																		

#44 Information about costs and charges is correct, clear and comprehensive

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	2	1	4	6	2	1	5	2	3	3	1	1	4	3	-	2	3	2
+6																		
+5																		
+4			F3	F2			F2											
+3							F3								F1		F1	
+2	F2 F4		F1			F1		F2		F3		F2	F3			F3		
+1	F1	F2			F1 F3	F2				F2	F1 F3	F1		F2				F1
0	F3	F1	F2					F1	F1		F2 F4		F1			F1 F2	F2	F3
-1					F2		F1		F2	F1				F1				F2
-2				F1									F2	F3				
-3									F3									
-4																		
-5																		
-6																		

#45 Wide doors, that are easy to open, for people with reduced mobility

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	3	0	3	0	6	3	3	3	4	3	4	2		2	-	6	1	3
+6																		
+5																		
+4																F1 F3		
+3									F3				F3				F2	F1 F2
+2					F1					F3	F2	F1		F3	F1		F1	
+1		F1		F1		F2		F1		F1			F2					
0		F4	F1 F2	F2	F1 F2		F3		F2		F3	F2	F1	F1 F2				F3
-1		F2							F1	F2	F4							
-2		F3		F3		F3	F1	F2	F2			F1				F2		
-3								F1										
-4					F2													
-5																		
-6																		

#46 A reliable lift

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	6	4	1	3	3	4	1	2	2	5	3	2	6	8	-	4	2	6
+6													F3					
+5									F3					F1	F1			F1
+4					F1				F2							F3		
+3		F1															F2	
+2			F1			F3	F1					F1		F2		F1		F2
+1					F2				F1		F2		F2				F1	
0		F2							F3	F1	F3	F2	F1			F2		
-1				F1			F3	F2	F2		F1							F3
-2		F3	F2	F1		F2	F1 F2					F4						
-3		F4		F2 F3				F1						F3				
-4				F2														
-5																		
-6																		



#47 A suitable storage area for buggies and other large items

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	2	2	6	1	2	1	2	0	4	4	1	1	2	0	-	3	1	4
+6																		
+5																		
+4																		
+3																		
+2			F1															
+1									F1							F2		
0				F1			F2			F2			F3		F1		F1	F2
-1	F2	F1		F2	F3		F3			F3		F2		F1 F2 F3			F2	
-2	F1		F3		F1	F2	F1		F1			F1	F1 F2			F1 F3		F1
-3	F3 F4	F2			F2	F1		F1 F2	F2		F1 F3							
-4			F2							F1	F2 F4							F3
-5																		
-6																		

#48 Good staff who provide consistency of service

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	4	5	5	1	4	2	3	1	1	3	3	2	1	1	-	4	2	2
+6		F2																
+5			F1		F1									F2				
+4	F1		F3		F3				F3	F1	F2		F2 F3	F1 F3	F1		F1	F1
+3	F3								F1 F2		F3 F4		F1			F1		F2
+2							F3	F2				F2				F3	F2	F3
+1		F1			F2			F1		F2 F3	F1							
0	F2 F4		F2	F1			F1					F1						
-1			F2			F2	F2									F2		
-2																		
-3						F1												
-4																		
-5																		
-6																		

#49 Common lounge used by external organisations and groups

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	2	1	2	1	5	2	4	1	6	6	1	1	2	3	-	2	1	2
+6																		
+5																		
+4																		
+3																		
+2									F3									
+1																		
0										F3								
-1		F1	F2		F2		F1							F1				F2 F3
-2	F3	F2		F1				F2	F2		F3		F1		F1	F2 F3	F1	
-3	F1 F2		F1 F3	F2	F1	F1	F2	F1		F1	F1 F2 F4	F1	F3	F3			F2	F1
-4	F4								F1			F2	F2	F2		F1		
-5						F2	F3											
-6					F3					F2								

#50 Guest room available for visitors

	RH Comb	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J	Site K	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5	
	1	4	1	5	2	0	1	3	3	4	2	2	2	2	-	3	2	2	
+6																			
+5																			
+4																			
+3				F1															
+2						F1 F2				F2		F1							
+1							F1 F3		F2					F2		F3			
0	F1 G2	F1	F1		F2		F2	F2	F1		F4	F2				F2		F2	
-1	F3 F4		F2 F3		F1					F3	F2 F3		F1	F1 F3				F3	
-2				F2	F3					F3	F1	F1		F3		F1	F1	F2	F1
-3								F1						F2				F1	
-4		F2																	
-5																			
-6																			

#51 Care staff on-site 24 hours 7 days a week if needed (EC)

															EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
															2	1	-	5	4	4
+6															F2	F2	F1	F1	F2	F2
+5																F1 F3				
+4															F1 F3			F3		
+3																				F3
+2																			F1	F1
+1																		F3		
0																				
-1																				
-2																				
-3																				
-4																				
-5																				
-6																				

#52 An on-site restaurant (EC)

																EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
																4	3	-	5	1	2
+6																					
+5																					
+4																			F1		
+3															F2	F3					
+2																F2					
+1															F1			F2	F1	F3	
0																F1			F2	F2	
-1															F3		F1	F3		F1	
-2																					
-3																					
-4																					
-5																					
-6																					

#53 Hairdressing salon on-site (EC)

	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	2	3	-	2	1	3
+6						
+5						
+4						
+3						
+2						
+1		F3				
0	F2	F2			F2	F2 F3
-1	F1		F1	F2	F1	
-2	F3	F1		F3		
-3				F1		F1
-4						
-5						
-6						

#54 An accessible bath for those that want or need it (EC)

	EC Comb	Site 1	Site 2	Site 3	Site 4	Site 5
	2	3	-	2	5	5
+6						
+5						
+4						
+3						
+2						
+1					F2	F1
0		F1				
-1	F2 F3	F3	F1	F3		
-2				F2		F3
-3	F1	F2		F1		
-4					F1	F2
-5						
-6						

## **Appendix 19**

### **Extra Care Second Order Factor Comparison**

*Extract of results from PQ Method showing results for Second Order Factor Comparison of Results from Extra Care Combined Study and Extra Care Sites 1-5.*

# Extra Care Second Order Factor Comparison

## Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
1 ComF1	100	80	71	67	74	63	71	77	81	92	77	82	71	85	73
2 ComF2	80	100	63	80	63	86	74	61	81	69	88	63	65	68	83
3 ComF3	71	63	100	68	84	44	90	85	75	56	76	61	85	73	61
4 Site1F1	67	80	68	100	61	57	76	67	76	57	77	53	70	58	72
5 Site1F2	74	63	84	61	100	50	75	70	74	54	72	67	76	68	62
6 Site1F3	63	86	44	57	50	100	58	46	66	55	68	49	46	53	62
7 Site2F1	71	74	90	76	75	58	100	77	76	58	81	54	80	70	69
8 Site5F1	77	61	85	67	70	46	77	100	63	65	69	61	75	72	59
9 Site5F2	81	81	75	76	74	66	76	63	100	70	79	68	74	76	77
10 Site5F3	92	69	56	57	54	55	58	65	70	100	63	68	61	72	63
11 Site3F1	77	88	76	77	72	68	81	69	79	63	100	66	71	72	79
12 Site3F2	82	63	61	53	67	49	54	61	68	68	66	100	53	65	63
13 Site3F3	71	65	85	70	76	46	80	75	74	61	71	53	100	66	63
14 Site4F1	85	68	73	58	68	53	70	72	76	72	72	65	66	100	59
15 Site4F2	73	83	61	72	62	62	69	59	77	63	79	63	63	59	100

## Factor Matrix with an X Indicating a Defining Sort

QSORT	Loadings		
	1	2	
1 ComF1	0.7827	0.5111	Confounded
2 ComF2	0.3722	0.9170X	
3 ComF3	0.8455X	0.3399	
4 Site1F1	0.4851	0.6691X	
5 Site1F2	0.7348X	0.4040	
6 Site1F3	0.2725	0.7223X	
7 Site2F1	0.6595	0.5739	Confounded
8 Site5F1	0.8219X	0.2996	
9 Site5F2	0.6135	0.6608	Confounded
10 Site5F3	0.6225X	0.4636	
11 Site3F1	0.5618	0.7229	Confounded
12 Site3F2	0.6064X	0.4425	
13 Site3F3	0.7182X	0.4321	
14 Site4F1	0.7365X	0.4133	
15 Site4F2	0.4396	0.7286X	
% expl.Var.	41	34	

## Correlations Between Factors

	1	2
1	1.0000	0.7483
2	0.7483	1.0000

### Factor Array for Factor 1

#### Independent, Secure and Connected

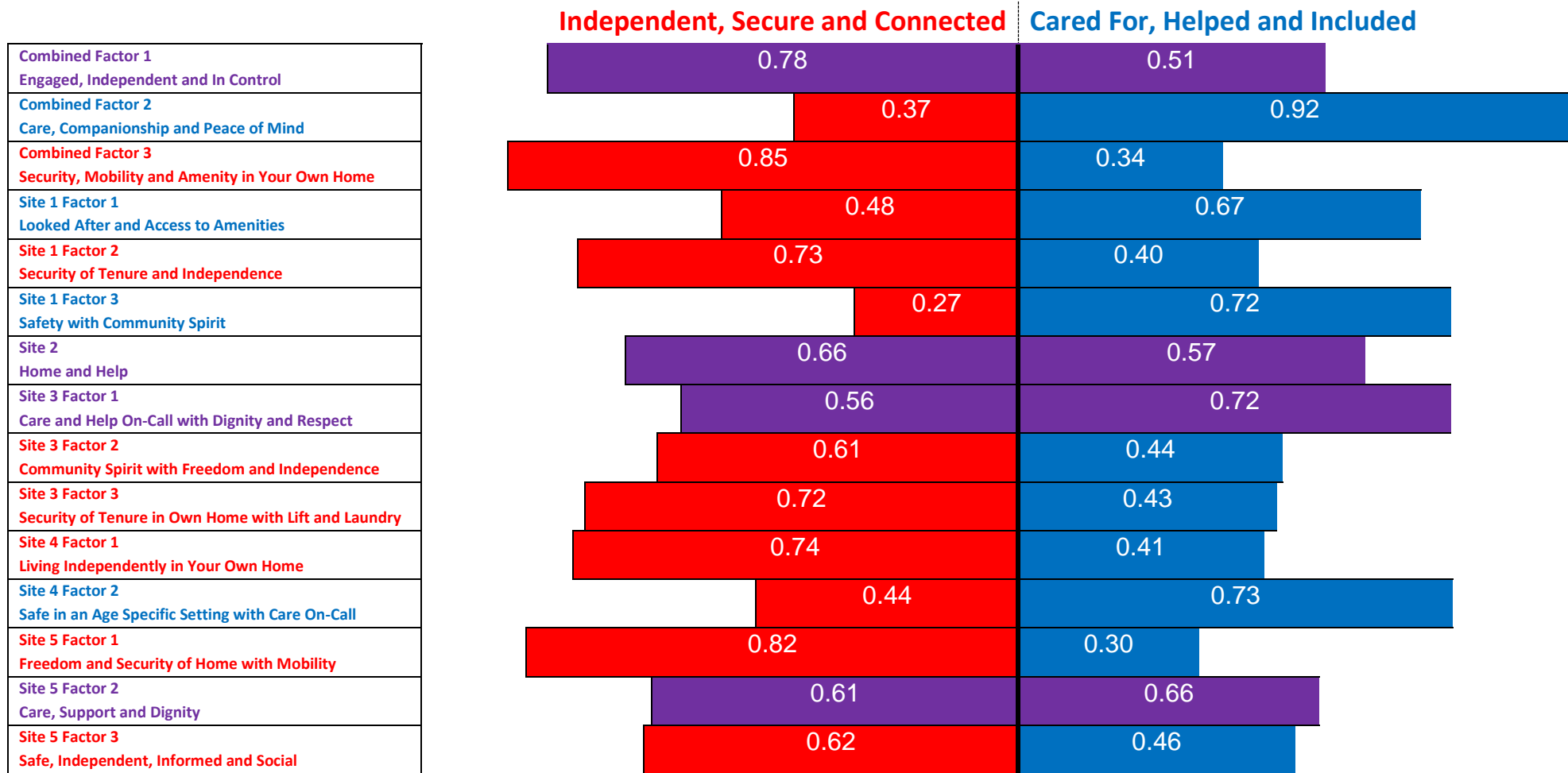
-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	34	26	37	53	11	30	44	45	48	1	28	24
35	3	38	49	33	47	19	5	6	46	31	17	14
		12	2	54	18	22	10	29	51	16		
			36	9	4	39	23	42	27			
				50	8	52	43	21				
					41	15	7					
					13	25	20					
						40						

### Factor Array for Factor 2

#### Cared For, Helped and Included

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	35	20	26	2	18	7	23	42	10	48	21	17
38	34	13	3	41	15	29	6	9	24	1	31	51
		49	50	47	37	53	25	16	19	5		
			22	44	39	28	46	8	52			
				33	54	36	27	30				
					12	40	11					
					4	43	45					
						14						

## Comparison of Extra Care Perspectives against Second Order Analysis Results





# **Appendix 20**

## **Retirement Housing Second Order Factor Comparison**

*Extract of results from PQ Method showing results for Second Order Factor  
Comparison of Results from Retirement Housing Combined Study and Retirement  
Housing Sites A-K.*

# Retirement Housing Second Order Factor Comparison

## Correlation Matrix Between Sorts

SORTS	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	31	33
1 CombF1	100	65	75	71	70	72	86	68	55	61	46	83	62	81	76	46	53	47	78	69	69	79	80	72	77	51	75	63	91	65	57	73	50
2 CombF2	65	100	71	67	84	67	65	45	79	84	75	73	54	65	50	51	66	75	70	61	81	78	59	32	65	54	62	84	54	71	71	80	74
3 CombF3	75	71	100	70	70	77	67	66	72	66	66	77	84	68	57	43	71	54	58	80	72	70	81	52	84	43	65	81	79	55	85	76	64
4 CombF4	71	67	70	100	54	66	65	81	49	59	54	61	63	71	69	77	69	55	83	86	66	77	67	56	71	55	53	75	69	55	63	73	58
5 SiteAF1	70	84	70	54	100	58	64	50	66	68	57	77	58	59	49	44	59	58	52	57	66	73	60	38	67	52	71	69	63	67	55	77	58
6 SiteAF2	72	67	77	66	58	100	61	62	74	70	55	64	59	73	55	40	47	47	58	67	77	70	60	61	64	25	62	73	72	64	71	64	54
7 SiteBF1	86	65	67	65	64	61	100	56	57	58	52	72	51	75	62	44	45	56	80	62	64	71	74	62	68	47	57	58	73	69	57	66	52
8 SiteBF2	68	45	66	81	50	62	56	100	36	44	33	50	64	58	63	52	50	45	63	78	54	60	65	56	63	31	61	61	72	43	45	62	37
9 SiteBF3	55	79	72	49	66	74	57	36	100	73	68	57	52	53	34	34	55	51	50	50	70	61	50	33	55	22	49	72	48	62	77	64	61
10 SiteCF1	61	84	66	59	68	70	58	44	73	100	54	63	59	58	48	44	56	54	63	57	72	69	55	41	53	46	48	65	52	69	69	69	61
11 SiteCF2	46	75	66	54	57	55	52	33	68	54	100	56	43	55	41	37	46	65	49	53	69	56	53	16	58	29	51	77	41	41	65	65	58
12 SiteDF1	83	73	77	61	77	64	72	50	57	63	56	100	60	65	56	38	61	49	64	69	67	78	65	53	75	58	66	69	78	53	61	76	66
13 SiteDF2	62	54	84	63	58	59	51	64	52	59	43	60	100	56	54	47	70	42	50	75	53	66	70	45	69	39	47	64	68	49	67	60	51
14 SiteDF3	81	65	68	71	59	73	75	58	53	58	55	65	56	100	71	52	46	49	72	64	69	73	73	49	71	49	60	67	73	61	60	66	56
15 SiteEF1	76	50	57	69	49	55	62	63	34	48	41	56	54	71	100	45	45	38	71	57	60	62	65	46	60	42	52	54	62	45	40	66	36
16 SiteEF2	46	51	43	77	44	40	44	52	34	44	37	38	47	52	45	100	60	44	58	61	48	68	41	39	48	46	27	53	50	42	39	52	41
17 SiteFF1	53	66	71	69	59	47	45	50	55	56	46	61	70	46	45	60	100	54	54	70	56	72	52	48	59	42	38	64	53	44	61	58	61
18 SiteFF2	47	75	54	55	58	47	56	45	51	54	65	49	42	49	38	44	54	100	60	49	64	59	48	27	45	34	48	65	39	53	51	55	56
19 SiteFF3	78	70	58	83	52	58	80	63	50	63	49	64	50	72	71	58	54	60	100	64	67	74	69	52	65	57	51	65	64	63	54	69	61
20 SiteGF1	69	61	80	86	57	67	62	78	50	57	53	69	75	64	57	61	70	49	64	100	59	75	73	54	71	47	55	72	71	45	64	69	53
21 SiteGF2	69	81	72	66	66	77	64	54	70	72	69	67	53	69	60	48	56	64	67	59	100	74	60	44	62	36	63	78	63	65	68	76	53
22 SiteHF1	79	78	70	77	73	70	71	60	61	69	56	78	66	73	62	68	72	59	74	75	74	100	64	61	67	60	61	75	73	71	60	74	59
23 SiteHF2	80	59	81	67	60	60	74	65	50	55	53	65	70	73	65	41	52	48	69	73	60	64	100	49	81	51	65	64	73	56	69	66	48
24 SiteHF3	72	32	52	56	38	61	62	56	33	41	16	53	45	49	46	39	48	27	52	54	44	61	49	100	45	15	54	37	70	47	39	42	25
25 SiteIF1	77	65	84	71	67	64	68	63	55	53	58	75	69	71	60	48	59	45	65	71	62	67	81	45	100	60	59	69	73	49	75	73	57
26 SiteIF2	51	54	43	55	52	25	47	31	22	46	29	58	39	49	42	46	42	34	57	47	36	60	51	15	60	100	34	42	41	50	45	55	44
27 SiteIF3	75	62	65	53	71	62	57	61	49	48	51	66	47	60	52	27	38	48	51	55	63	61	65	54	59	34	100	59	67	55	48	69	37
28 SiteJF1	63	84	81	75	69	73	58	61	72	65	77	69	64	67	54	53	64	65	65	72	78	75	64	37	69	42	59	100	63	56	74	80	74
29 SiteJF2	91	54	79	69	63	72	73	72	48	52	41	78	68	73	62	50	53	39	64	71	63	73	73	70	73	41	67	63	100	56	56	66	48
30 SiteJF3	65	71	55	55	67	64	69	43	62	69	41	53	49	61	45	42	44	53	63	45	65	71	56	47	49	50	55	56	56	100	57	61	40
31 SiteJF4	57	71	85	63	55	71	57	45	77	69	65	61	67	60	40	39	61	51	54	64	68	60	69	39	75	45	48	74	56	57	100	65	69
32 SiteKF1	73	80	76	73	77	64	66	62	64	69	65	76	60	66	66	52	58	55	69	69	76	74	66	42	73	55	69	80	66	61	65	100	60
33 SiteKF2	50	74	64	58	58	54	52	37	61	61	58	66	51	56	36	41	61	56	61	53	53	59	48	25	57	44	37	74	48	40	69	60	100

## Factor Matrix with an X Indicating a Defining Sort

QSORT	Loadings		
	2	1	
1 CombF1	0.8050X	0.4313	
2 CombF2	0.3433	0.8961X	
3 CombF3	0.6187	0.6465	Confounded
4 CombF4	0.8243X	0.3738	
5 SiteAF1	0.4308	0.7050X	
6 SiteAF2	0.5106	0.6339	Confounded
7 SiteBF1	0.6652X	0.4733	
8 SiteBF2	0.7428X	0.2577	
9 SiteBF3	0.1931	0.8471X	
10 SiteCF1	0.3815	0.7192X	
11 SiteCF2	0.2223	0.7514X	
12 SiteDF1	0.6057	0.5758	Confounded
13 SiteDF2	0.6137X	0.4403	
14 SiteDF3	0.6757X	0.4765	
15 SiteEF1	0.7124X	0.2629	
16 SiteEF2	0.6245X	0.2250	
17 SiteFF1	0.5333X	0.4854	
18 SiteFF2	0.3346	0.6068X	
19 SiteFF3	0.7303X	0.4115	
20 SiteGF1	0.7560X	0.4034	
21 SiteGF2	0.4356	0.7448X	
22 SiteHF1	0.6995	0.5571	Confounded
23 SiteHF2	0.7134X	0.4300	
24 SiteHF3	0.6308X	0.1889	
25 SiteIF1	0.6764X	0.4985	
26 SiteIF2	0.4801	0.3105	Not Significant at >0.5
27 SiteIF3	0.4909	0.5183X	
28 SiteJF1	0.4628	0.7641X	
29 SiteJF2	0.7689X	0.3802	
30 SiteJF3	0.4729	0.5443X	
31 SiteJF4	0.4208	0.6973X	
32 SiteKF1	0.5570	0.6663	Confounded
33 SiteKF2	0.3589	0.6298X	
% expl.Var. = 65%	34	31	Total Variation Explained

## Correlations Between Factors

	2	1
2	1.0000	0.7708
1	0.7708	1.0000

**Factor Scores for Factor 1**

**Secure, Connected and Orderly**

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	35	38	12	19	11	23	48	44	5	16	14	17
26	34	2	49	47	41	8	21	4	27	28	31	24
		33	3	36	10	7	13	40	6	1		
			37	45	9	25	29	15	42			
				46	43	22	39	20				
					50	30	18					

**Factor Array for Factor 2**

**Looked After, Companionship and Consistency**

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	34	38	49	18	46	11	25	42	28	16	17	1
35	3	26	20	33	41	23	9	2	6	21	31	24
		13	47	22	50	7	12	27	5	10		
			37	36	39	40	15	14	48			
				30	19	44	43	8				
					45	29	4					

## Comparison of Retirement Housing Perspectives against Second Order Analysis Results

		LOOKED AFTER COMPANIONSHIP AND CONSISTENCY	SECURE CONNECTED AND ORDERLY
Combined 1	Looked After and Dignified	0.805	0.431
Combined 2	Property Maintenance and Independence	0.343	0.896
Combined 3	Respect and Freindship	0.618	0.647
Combined 4	Age and Assurance	0.824	0.374
A1	Secure But Not Social	0.431	0.705
A2	Supported But Not Small	0.511	0.634
B1	Safety, Speed and Certainty	0.665	0.473
B2	Age Exclusivity with No Worries	0.743	0.258
B3	Autonomy, Animals and Internet	0.193	0.847
C1	Own Home Independence with Help on Hand	0.382	0.719
C2	Safe Secure and Convenient	0.222	0.751
D1	Support and Suitability	0.606	0.576
D2	Home and Community	0.614	0.440
D3	Safety and Respect but Independent	0.676	0.477
E1	Warm and Respected with On-Site Manager	0.712	0.263
E2	Age Security and Independence	0.625	0.225
F1	Age, Independence and Parking	0.533	0.485
F2	Modern Maintained Property	0.335	0.607
F3	Safe, Protected and Private	0.730	0.412
G1	Own Home and Age Exclusive	0.756	0.403
G2	Court Manager and Safe Tenure	0.436	0.745
H1	Supported Independence, Warm and Secure	0.700	0.557
H2	Own Home, Dignity and Amenity	0.714	0.430
H3	On-Site Manager, Protected and Community Spirit	0.631	0.189
I1	Own Home with Dignity and Freedom	0.676	0.499
I2	A Home without Community	0.480	0.311
I3	Safety and Security without Support	0.491	0.518
J1	Tenure, Respect and Age	0.463	0.764
J2	Supported, Social and Safe	0.769	0.380
J3	Peace of Mind, Repairs and Personal Space	0.473	0.544
J4	Dignity, Community Spirit and Standards	0.421	0.679
K1	Freedom, Tenure Security and Convenience	0.557	0.666
K2	Independent Home and Gardens	0.359	0.630

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## **Appendix 21**

### **Arrays for Single Centroid Age Comparisons for Extra Care and Retirement Housing**

## Extra Care Aged Under 75 (1 Centroid)

### Factor Matrix with an X Indicating a Defining Sort

```

1 5R3      0.7218X
2 5R4      0.4058
3 5R5      0.7277X
4 5R6      0.7048X
5 5R7      0.6277X
6 5R8      0.8270X
7 5R9      0.7784X
8 5R10     0.8385X
9 5R12     0.6991X
10 5R13    0.2685
11 5R15    0.7610X
12 5R18    0.7258X
13 4R3     0.7524X
14 4R4     0.5271X
15 4R5     0.5763X
16 4R7     0.6874X
17 4R8     0.7941X
18 5R20    0.8837X
19 3R1     0.7943X
20 3R2     0.7983X
21 3R5     0.7165X
22 3R9     0.8211X
23 3R13    0.6790X
24 2R2     0.6501X
25 2R4     0.5422X
26 2R5     0.8212X
27 2R6     0.6824X
28 2R7     0.7507X
29 2R8     0.7364X
30 2R9     0.6642X

```

% expl.Var.      50

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	26	3	2	13	11	4	5	16	10	1	28	17
35	34	12	36	20	18	7	6	27	14	24	48	51
		38	37	50	22	8	19	29	21	31		
			49	53	33	9	23	42	46			
				54	40	15	30	45				
					41	25	43					
					47	39	44					
						52						



## Extra Care Aged 75 or over (1 Centroid)

### Factor Matrix with an X Indicating a Defining Sort

1	5R1	0.7240X	22	1R11	0.6907X
2	5R2	0.7271X	23	1R12	0.7575X
3	5R11	0.8749X	24	1R13	0.4938
4	5R14	0.8283X	25	1R14	0.7831X
5	5R16	0.8036X	26	1R15	0.7420X
6	5R17	0.5452X	27	5R21	0.8235X
7	5R19	0.7263X	28	3R3	0.8113X
8	4R1	0.8022X	29	3R4	0.8524X
9	4R2	0.7931X	30	3R6	0.6285X
10	4R6	0.7213X	31	3R7	0.6035X
11	4R9	0.7492X	32	3R8	0.8366X
12	1R1	0.5473X	33	3R10	0.6977X
13	1R2	0.6347X	34	3R11	0.6660X
14	1R3	0.5977X	35	3R12	0.6140X
15	1R4	0.7750X	36	3R14	0.5548X
16	1R5	0.4277	37	2R1	0.1058
17	1R6	0.5923X	38	2R3	0.6876X
18	1R7	0.6378X			
19	1R8	0.5684X	% expl.Var.	48	
20	1R9	0.7410X			
21	1R10	0.6528X			

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	3	13	2	22	4	7	6	5	10	24	1	17
34	35	26	12	33	8	9	29	14	16	31	51	21
		38	20	49	18	11	40	42	27	48		
			37	50	36	15	43	45	28			
				54	41	19	44	46				
					47	23	52					
					53	30	25					
						39						

**Table A21.1: Extra Care Comparison of Second Order Perspectives 1 and 2 with Single Centroid Solutions for Participants Aged Under 75 and 75 and Older.**

#		P1	P2	<75	≥75
1	A court manager to turn to if you need help and advice	4	4	4	5
2	A resident manager or warden who lives on-site	-3	-2	-3	-3
3	A court manager who is only employed on a part-time basis	-5	-3	-4	-5
4	Close to shops, amenities and transport	-1	-1	0	-1
5	No need to worry about maintenance and repairs	1	4	1	2
6	Repairs or problems are addressed and fixed quickly	2	1	1	1
7	The appearance of the Court creates a good impression	1	0	0	0
8	Companionship of neighbours so you are never lonely	-1	2	0	-1
9	Use of a communal lounge and other shared facilities	-2	2	0	0
10	Peace of mind that comes from being looked after	1	3	3	3
11	Living around people of a similar age and outlook	-1	1	-1	0
12	Occupancy restricted to only retired people aged over 65	-4	-1	-4	-3
13	Residents are able to have dogs, cats or other pets	-1	-4	-2	-4
14	Having security of tenure	6	0	3	2
15	A communal laundry room with washers and dryers	0	-1	0	0
16	An effective and efficient heating and hot water system	4	2	2	3
17	Feeling safe and secure	5	6	6	6
18	A garden or balcony so you can sit out in private	-1	-1	-1	-1
19	Social events and activities to get involved in	0	3	1	0
20	Availability of a good internet connection and/or wifi	1	-4	-2	-3
21	Pull-cord or pendant to summon help in an emergency	2	5	3	6
22	Sufficient car parking spaces	0	-3	-1	-2
23	Community spirit and friendship with people of similar age and outlook	1	1	1	0
24	You have your own home with your own front door	6	3	4	4
25	In a nice area with attractive surroundings	0	1	0	1
26	Being seen as a form of care home	-4	-3	-5	-4
27	Freedom to live as you choose: no requirement to join in or conform	3	1	2	3
28	Independent living	5	0	5	3
29	Able to have your say and raise matters with senior management	2	0	2	1
30	Residents are engaged and able to exercise choice and control	0	2	1	0
31	Residents are treated with dignity and respect	4	5	4	4
32	Some other residents behave badly	-6	-6	-6	-6
33	Residents who take control and assume responsibility for organising things	-2	-2	-1	-2
34	People don't respect privacy or confidentiality	-5	-5	-5	-6
35	Gossip spreads quickly	-6	-5	-6	-5
36	Residents with dementia or who need to be looked after	-3	0	-3	-1
37	Living in close proximity to others in a compact community	-3	-1	-3	-3
38	Small flats	-4	-6	-4	-4
39	Properties and facilities that are modern and well designed	0	-1	0	0
40	Buildings and gardens are kept clean and tidy	0	0	-1	1
41	Contemporary kitchens and bathrooms	-1	-2	-1	-1
42	Checks on fire, electrical, gas, asbestos and water safety	2	2	2	2
43	Everyone is kept informed and up to date about local plans and activities	1	0	1	1
44	Information about costs and charges is correct, clear and comprehensive	1	-2	1	1
45	Wide doors, that are easy to open, for people with reduced mobility	2	1	2	2
46	A reliable lift	3	1	3	2
47	A suitable storage area for buggies and other large items	-1	-2	-1	-1
48	Good staff who provide consistency of service	3	4	5	4
49	Common lounge used by external organisations and groups	-3	-4	-3	-2
50	Guest room available for visitors	-2	-3	-2	-2
51	Care staff on-site 24 hours 7 days a week if needed (EC)	3	6	6	5
52	An on-site restaurant (EC)	0	3	0	1
53	Hairdressing salon on-site (EC)	-2	0	-2	-1
54	An accessible bath for those that want or need it (EC)	-2	-1	-2	-2

**Colour Code**

21	Insufficient evidence of difference between Perspectives or Age Categories	4	Possible relationship between Perspective 1 : <75 and Perspective 2 : ≥75
13	Inconclusive evidence of relationship between Perspective 1 : <75 and Perspective 2 : ≥75	16	Inconsistent with relationship between Perspective 1 : <75 and Perspective 2 : ≥75

## Retirement Housing Aged Under 75 (1 Centroid)

### Factor Matrix with an X Indicating a Defining Sort

1 Ires1	0.6450X	28 Jres10	0.6138X	55 Hres8	0.6823X
2 Ires2	0.7051X	29 Jres11	0.4564	56 Dres1	0.6986X
3 Ires3	0.4628	30 Jres12	0.7764X	57 Dres2	0.7490X
4 Ires4	0.6050X	31 Jres16	0.5495X	58 Dres3	0.7454X
5 Ires6	0.6972X	32 Jres20	0.6393X	59 Dres5	0.6186X
6 Ires7	0.5398X	33 Jres21	0.6895X	60 Dres8	0.4964
7 Ires8	0.7502X	34 Jres22	0.6873X	61 Dres9	0.7504X
8 Ires10	0.2625	35 Jres23	0.7677X	62 Dres11	0.3888
9 Ares2	0.8402X	36 Jres24	0.6742X	63 Dres12	0.7500X
10 Ares3	0.7871X	37 Cres1	0.6205X	64 Dres14	0.7538X
11 Ares4	0.6484X	38 Cres3	0.4895	65 Fres2	0.5698X
12 Ares5	0.5661X	39 Cres4	0.7326X	66 Fres3	0.6664X
13 Ares7	0.6120X	40 Cres5	0.6682X	67 Fres4	0.7098X
14 Ares8	0.7155X	41 Cres6	0.6876X	68 Fres7	0.5847X
15 Ares10	0.6485X	42 Cres7	0.7326X	69 Fres9	0.7289X
16 Kres3	0.5505X	43 Gres1	0.6295X	70 Fres10	0.5890X
17 Kres4	0.6455X	44 Gres2	0.7171X	71 Fres12	0.4669
18 Kres6	0.5104X	45 Gres3	0.7327X	72 Fres13	0.5140X
19 Kres8	0.6631X	46 Gres5	0.7762X	73 Fres14	0.5734X
20 Kres11	0.6040X	47 Gres8	0.5939X	74 Fres17	0.3579
21 Jres1	0.7833X	48 Bres3	0.6575X	75 Fres21	0.5962X
22 Jres2	0.5556X	49 Bres5	0.6081X	76 Eres1	0.7332X
23 Jres5	0.5594X	50 Bres10	0.7917X	77 Eres8	0.6004X
24 Jres6	0.7371X	51 Bres13	0.7106X		
25 Jres7	0.7702X	52 Bres15	0.5908X	% expl.Var.	42
26 Jres8	0.7465X	53 Bres16	0.7477X		
27 Jres9	0.6287X	54 Bres17	0.3680		

### Factor Array Retirement Housing Aged Under 75 - Single Centroid

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	26	3	2	11	18	8	7	4	5	14	1	17
35	34	37	33	12	19	9	22	15	6	16	28	24
		38	47	13	20	10	25	21	27	31		
			49	36	41	23	29	42	48			
				50	45	30	39	44				
					46	43	40					

## Retirement Housing Aged 75 or Over (1 Centroid)

### Factor Matrix with an X Indicating a Defining Sort

1 Ires5	0.5000X	29 Gres10	0.6768X	57 Dres4	0.6041X
2 Ires9	0.6454X	30 Gres11	0.3634	58 Dres6	0.6578X
3 Ares1	0.7255X	31 Gres12	0.5917X	59 Dres7	0.5254X
4 Ares6	0.7189X	32 Cres13	0.6457X	60 Dres10	0.8096X
5 Ares9	0.5846X	33 Bres1	0.6505X	61 Dres13	0.4833
6 Kres1	0.6441X	34 Bres2	0.5757X	62 Dres15	0.6604X
7 Kres2	0.5687X	35 Bres4	0.5337X	63 Dres16	0.6930X
8 Kres5	0.6054X	36 Bres6	0.7070X	64 Fres1	0.3434
9 Kres7	0.7131X	37 Bres7	0.6974X	65 Fres5	0.3697
10 Kres9	0.6697X	38 Bres8	0.6350X	66 Fres6	0.6321X
11 Kres10	0.8237X	39 Bres9	0.4762	67 Fres8	0.6546X
12 Kres12	0.5463X	40 Bres11	0.7510X	68 Fres11	0.5934X
13 Kres13	0.5065X	41 Bres12	0.7055X	69 Fres15	0.8091X
14 Jres3	0.6697X	42 Bres14	0.5737X	70 Fres16	0.6272X
15 Jres4	0.7519X	43 Bres18	0.4709X	71 Fres18	0.5715X
16 Jres13	0.6948X	44 Hres1	0.8008X	72 Fres19	0.5880X
17 Jres14	0.6664X	45 Hres2	0.6705X	73 Fres20	0.2713
18 Jres15	0.8470X	46 Hres3	0.7274X	74 Eres2	0.7411X
19 Jres17	0.4871	47 Hres4	0.7160X	75 Eres3	0.6519X
20 Jres18	0.8862X	48 Hres5	0.7216X	76 Eres4	0.6540X
21 Jres19	0.5543X	49 Hres6	0.7017X	77 Eres5	0.5575X
22 Cres2	0.6913X	50 Hres7	0.7384X	78 Eres6	0.6519X
23 Cres8	0.4879	51 Hres9	0.7891X	79 Eres7	0.4493
24 Cres9	0.7834X	52 Hres10	0.6604X	80 Eres9	0.5256X
25 Gres4	0.6517X	53 Hres11	0.6431X		
26 Gres6	0.5931X	54 Hres12	0.4735	% expl.Var.	40
27 Gres7	0.4816	55 Hres13	0.6612X		
28 Gres9	0.6134X	56 Hres14	0.3857		

### Factor Array Retirement Housing Aged 75 or Over - Single Centroid

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	3	13	20	18	12	2	4	6	5	16	21	1
35	34	26	33	22	19	7	23	8	10	28	24	17
		38	36	37	30	9	25	14	27	31		
			49	41	45	11	29	15	48			
				47	46	39	40	42				
					50	43	44					

**Table A21.2: Retirement Housing Comparison of Second Order Perspectives 1 and 2 with Single Centroid Solutions for Participants Aged Under 75 and 75 and Older.**

#		P1	P2	<75	≥75
1	A court manager to turn to if you need help and advice	4	6	5	6
2	A resident manager or warden who lives on-site	-4	2	-3	0
3	A court manager who is only employed on a part-time basis	-3	-5	-4	-5
4	Close to shops, amenities and transport	2	1	2	1
5	No need to worry about maintenance and repairs	3	3	3	3
6	Repairs or problems are addressed and fixed quickly	3	3	3	2
7	The appearance of the Court creates a good impression	0	0	1	0
8	Companionship of neighbours so you are never lonely	0	2	0	2
9	Use of a communal lounge and other shared facilities	-1	1	0	0
10	Peace of mind that comes from being looked after	-1	4	0	3
11	Living around people of a similar age and outlook	-1	0	-2	0
12	Occupancy restricted to only retired people aged over 65	-3	1	-2	-1
13	Residents are able to have dogs, cats or other pets	1	-4	-2	-4
14	Having security of tenure	5	2	4	2
15	A communal laundry room with washers and dryers	2	1	2	2
16	An effective and efficient heating and hot water system	4	4	4	4
17	Feeling safe and secure	6	5	6	6
18	A garden or balcony so you can sit out in private	1	-2	-1	-2
19	Social events and activities to get involved in	-2	-1	-1	-1
20	Availability of a good Internet connection and/or wifi	2	-3	-1	-3
21	Pull-cord or pendant to summon help in an emergency	1	4	2	5
22	Sufficient car parking spaces	0	-2	1	-2
23	Community spirit and friendship with people of similar age and outlook	0	0	0	1
24	You have your own home with your own front door	6	6	6	5
25	In a nice area with attractive surroundings	0	1	1	1
26	Being seen as a form of care home	-6	-4	-5	-4
27	Freedom to live as you choose: no requirement to join in or conform	3	2	3	3
28	Independent living	4	3	5	4
29	Able to have your say and raise matters with senior management	1	0	1	1
30	Residents are engaged and able to exercise choice and control	0	-2	0	-1
31	Residents are treated with dignity and respect	5	5	4	4
32	Some other residents behave badly	-6	-6	-6	-6
33	Residents who take control and assume responsibility for organising things	-4	-2	-3	-3
34	People don't respect privacy or confidentiality	-5	-5	-5	-5
35	Gossip spreads quickly	-5	-6	-6	-6
36	Residents with dementia or who need to be looked after	-2	-2	-2	-3
37	Living in close proximity to others in a compact community	-3	-3	-4	-2
38	Small flats	-4	-4	-4	-4
39	Properties and facilities that are modern and well designed	1	-1	1	0
40	Buildings and gardens are kept clean and tidy	2	0	1	1
41	Contemporary kitchens and bathrooms	-1	-1	-1	-2
42	Checks on fire, electrical, gas, asbestos and water safety	3	2	2	2
43	Everyone is kept informed and up to date about local plans and activities	-1	1	0	0
44	Information about costs and charges is correct, clear and comprehensive	2	0	2	1
45	Wide doors, that are easy to open, for people with reduced mobility	-2	-1	-1	-1
46	A reliable lift	-2	-1	-1	-1
47	A suitable storage area for buggies and other large items	-2	-3	-3	-2
48	Good staff who provide consistency of service	1	3	3	3
49	Common lounge used by external organisations and groups	-3	-3	-3	-3
50	Guest room available for visitors	-1	-1	-2	-1

**Colour Code**

25	Insufficient evidence of difference between Perspectives or Age Categories	7	Possible relationship between Perspective 1 : <75 and Perspective 2 : ≥ 75
12	Inconclusive evidence of relationship between Perspective 1 : <75 and Perspective 2 : ≥ 75	6	Inconsistent with relationship between Perspective 1 : <75 and Perspective 2 : ≥ 75

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**Appendix 22**

**Arrays for Single Centroid Length of Tenure  
Comparisons for  
Extra Care and Retirement Housing**

## Extra Care – Under 2 Years’ Tenure – 1 Centroid only

### Factor Matrix for Under 2 Years’ Tenure – X Indicating a Defining Sort

```

1 5 res3      0.7279X
2 5 res4      0.4311
3 5 res7      0.6223X
4 5 res8      0.8066X
5 5 res9      0.8339X
6 5 res16     0.7834X
7 5 res17     0.5264X
8 4 res1      0.8050X
9 4 res2      0.8219X
10 4 res3     0.7862X
11 4 res4     0.5060X
12 4 res5     0.5334X
13 4 res7     0.6813X
14 4 res8     0.8184X
15 4 res9     0.7369X
16 1 res1     0.5214X
17 1 res2     0.6275X
18 1 res3     0.6053X
19 1 res6     0.5650X
20 1 res7     0.6619X
21 1 res8     0.5465X
22 1 res10    0.6763X
23 1 res11    0.6810X
24 1 res12    0.7267X
25 1 res13    0.4879
26 1 res14    0.8160X
27 5 res20    0.8903X
28 5 res21    0.8656X
29 3 res4     0.8561X
30 3 res6     0.6258X
31 3 res7     0.6320X
32 3 res8     0.8414X
33 3 res10    0.7135X
34 3 res11    0.6913X
35 2 res4     0.5235X
36 2 res9     0.6703X

```

% expl.Var.                    48

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	3	2	12	13	8	4	19	5	14	21	1	24
34	35	26	37	20	11	7	25	6	16	31	17	51
		38	49	22	15	9	29	10	28	48		
			54	33	18	23	43	27	45			
				53	36	30	44	42				
					41	39	46					
					50	40	52					
						47						



## Extra Care – 2 Years' Tenure or Over – 1 Centroid only

### Factor Matrix for 2 Years' Tenure or Over - X Indicating a Defining Sort

1	5	res1	0.7323X
2	5	res2	0.6737X
3	5	res5	0.7133X
4	5	res6	0.6928X
5	5	res10	0.8766X
6	5	res11	0.8941X
7	5	res12	0.6986X
8	5	res13	0.2617
9	5	res14	0.8064X
10	5	res15	0.7176X
11	5	res18	0.7141X
12	5	res19	0.7447X
13	4	res6	0.6928X
14	1	res4	0.7485X
15	1	res5	0.4045
16	1	res9	0.7159X
17	1	res15	0.7263X
18	3	res1	0.8067X
19	3	res2	0.7950X
20	3	res3	0.8142X
21	3	res5	0.7205X
22	3	res9	0.8298X
23	3	res12	0.5929X
24	3	res13	0.6653X
25	3	res14	0.5620X
26	2	res1	0.1320
27	2	res2	0.6636X
28	2	res3	0.7147X
29	2	res5	0.7814X
30	2	res6	0.6607X
31	2	res7	0.7391X
32	2	res8	0.7085X

% expl.Var.            50

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	26	3	13	22	2	7	5	14	10	1	21	17
35	34	12	20	33	4	8	6	16	27	24	31	51
		38	37	36	11	9	15	43	28	48		
			49	50	18	19	23	45	42			
				54	41	25	29	46				
					47	39	30					
						53	40	44				
							52					

**Table A22.1: Extra Care Comparison of Second Order Perspectives and 1 Centroid Solutions for Participants with Tenure Under 2 Years or 2 Years and Over.**

#		P1	P2	<2 years	≥2 years
1	A court manager to turn to if you need help and advice	4	4	5	4
2	A resident manager or warden who lives on-site	-3	-2	-4	-1
3	A court manager who is only employed on a part-time basis	-5	-3	-5	-4
4	Close to shops, amenities and transport	-1	-1	0	-1
5	No need to worry about maintenance and repairs	1	4	2	1
6	Repairs or problems are addressed and fixed quickly	2	1	2	1
7	The appearance of the Court creates a good impression	1	0	0	0
8	Companionship of neighbours so you are never lonely	-1	2	-1	0
9	Use of a communal lounge and other shared facilities	-2	2	0	0
10	Peace of mind that comes from being looked after	1	3	2	3
11	Living around people of a similar age and outlook	-1	1	-1	-1
12	Occupancy restricted to only retired people aged over 65	-4	-1	-3	-4
13	Residents are able to have dogs, cats or other pets	-1	-4	-2	-3
14	Having security of tenure	6	0	3	2
15	A communal laundry room with washers and dryers	0	-1	-1	1
16	An effective and efficient heating and hot water system	4	2	3	2
17	Feeling safe and secure	5	6	5	6
18	A garden or balcony so you can sit out in private	-1	-1	-1	-1
19	Social events and activities to get involved in	0	3	1	0
20	Availability of a good internet connection and/or wifi	1	-4	-2	-3
21	Pull-cord or pendant to summon help in an emergency	2	5	4	5
22	Sufficient car parking spaces	0	-3	-2	-2
23	Community spirit and friendship with people of similar age and outlook	1	1	0	1
24	You have your own home with your own front door	6	3	6	4
25	In a nice area with attractive surroundings	0	1	1	0
26	Being seen as a form of care home	-4	-3	-4	-5
27	Freedom to live as you choose: no requirement to join in or conform	3	1	2	3
28	Independent living	5	0	3	3
29	Able to have your say and raise matters with senior management	2	0	1	1
30	Residents are engaged and able to exercise choice and control	0	2	0	1
31	Residents are treated with dignity and respect	4	5	4	5
32	Some other residents behave badly	-6	-6	-6	-6
33	Residents who take control and assume responsibility for organising things	-2	-2	-2	-2
34	People don't respect privacy or confidentiality	-5	-5	-6	-5
35	Gossip spreads quickly	-6	-5	-5	-6
36	Residents with dementia or who need to be looked after	-3	0	-1	-2
37	Living in close proximity to others in a compact community	-3	-1	-3	-3
38	Small flats	-4	-6	-4	-4
39	Properties and facilities that are modern and well designed	0	-1	0	0
40	Buildings and gardens are kept clean and tidy	0	0	0	0
41	Contemporary kitchens and bathrooms	-1	-2	-1	-1
42	Checks on fire, electrical, gas, asbestos and water safety	2	2	2	3
43	Everyone is kept informed and up to date about local plans and activities	1	0	1	2
44	Information about costs and charges is correct, clear and comprehensive	1	-2	1	1
45	Wide doors, that are easy to open, for people with reduced mobility	2	1	3	2
46	A reliable lift	3	1	1	2
47	A suitable storage area for buggies and other large items	-1	-2	0	-1
48	Good staff who provide consistency of service	3	4	4	4
49	Common lounge used by external organisations and groups	-3	-4	-3	-3
50	Guest room available for visitors	-2	-3	-1	-2
51	Care staff on-site 24 hours 7 days a week if needed (EC)	3	6	6	6
52	An on-site restaurant (EC)	0	3	1	0
53	Hairdressing salon on-site (EC)	-2	0	-2	-1
54	An accessible bath for those that want or need it (EC)	-2	-1	-3	-2

Colour Code

18	Insufficient evidence of difference between Perspectives or Age Categories
20	Inconclusive evidence of relationship between Perspective 1 : <75 and Perspective 2 : ≥ 75

0	Possible relationship between Perspective 1 : <75 and Perspective 2 : ≥ 75
18	Inconsistent with relationship between Perspective 1 : <75 and Perspective 2 : ≥ 75

## Retirement Housing – Tenure Analysis Under 5 Years

### Factor Matrix for Under 5 Years' Tenure – X Indicating a Defining Sort

1 Ires1	0.6670X	32 Jres20	0.6351X	63 Hres8	0.7149X
2 Ires2	0.7391X	33 Jres21	0.7150X	64 Hres9	0.7394X
3 Ires3	0.4648	34 Jres22	0.6716X	65 Hres10	0.6803X
4 Ires4	0.6238X	35 Jres23	0.7604X	66 Hres12	0.4527
5 Ires6	0.6738X	36 Cres1	0.5741X	67 Hres13	0.6544X
6 Ires7	0.5049X	37 Cres2	0.7600X	68 Hres14	0.3314
7 Ires8	0.7694X	38 Cres3	0.5087X	69 Dres1	0.7074X
8 Ires9	0.6486X	39 Cres4	0.7070X	70 Dres2	0.7440X
9 Ares7	0.5868X	40 Cres5	0.6243X	71 Dres3	0.7586X
10 Ares8	0.6891X	41 Cres6	0.6766X	72 Dres4	0.5652X
11 Kres1	0.7170X	42 Cres8	0.5447X	73 Dres8	0.5232X
12 Kres2	0.5595X	43 Cres9	0.7852X	74 Dres9	0.7560X
13 Kres3	0.4879	44 Gres1	0.6260X	75 Dres11	0.3562
14 Kres4	0.6361X	45 Gres2	0.6945X	76 Dres12	0.7613X
15 Kres5	0.6306X	46 Gres3	0.7373X	77 Dres14	0.7649X
16 Kres6	0.5106X	47 Gres6	0.5985X	78 Dres16	0.7080X
17 Kres7	0.6372X	48 Gres8	0.6300X	79 Fres7	0.5852X
18 Kres8	0.6596X	49 Gres11	0.3304	80 Fres9	0.7357X
19 Kres9	0.6508X	50 Bres2	0.5426X	81 Fres15	0.8287X
20 Kres10	0.8268X	51 Bres3	0.6319X	82 Fres16	0.5988X
21 Kres11	0.6200X	52 Bres5	0.6360X	83 Fres17	0.3354
22 Jres2	0.5371X	53 Bres8	0.6319X	84 Fres20	0.2411
23 Jres3	0.6423X	54 Bres10	0.8034X	85 Fres21	0.6167X
24 Jres4	0.8290X	55 Bres11	0.6925X	86 Eres1	0.7445X
25 Jres5	0.5504X	56 Bres13	0.6806X		
26 Jres7	0.7743X	57 Bres14	0.5863X	% expl.Var.	41
27 Jres10	0.5727X	58 Bres15	0.6110X		
28 Jres11	0.4507	59 Bres16	0.7391X		
29 Jres12	0.7588X	60 Hres2	0.6001X		
30 Jres17	0.4312	61 Hres3	0.6769X		
31 Jres19	0.5526X	62 Hres4	0.6765X		

### Factor Array Retirement Housing Under 5 Years' Tenure – Single Centroid

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	26	3	13	2	11	7	10	4	5	16	1	17
35	34	38	33	12	18	8	23	6	14	21	31	24
		49	37	20	19	9	25	15	27	28		
			47	36	22	30	29	40	48			
				50	45	41	39	42				
					46	43	44					

## Retirement Housing – Tenure Analysis 5 Years or Over

### Factor Matrix for 5 Years' Tenure of Over - X Indicating a Defining Sort

1 Ires5	0.5168X	25 Gres5	0.7796X	49 Dres15	0.6639X
2 Ires10	0.2057	26 Gres7	0.4694	50 Fres1	0.3803
3 Ares1	0.7431X	27 Gres9	0.5821X	51 Fres2	0.5540X
4 Ares2	0.7857X	28 Gres10	0.6560X	52 Fres3	0.6404X
5 Ares3	0.7300X	29 Gres12	0.5936X	53 Fres4	0.7725X
6 Ares4	0.6196X	30 Cres13	0.6295X	54 Fres5	0.4275
7 Ares5	0.5522X	31 Bres1	0.6305X	55 Fres6	0.6419X
8 Ares6	0.6650X	32 Bres4	0.5082X	56 Fres8	0.6532X
9 Ares9	0.6131X	33 Bres6	0.7017X	57 Fres10	0.5717X
10 Ares10	0.6021X	34 Bres7	0.6902X	58 Fres11	0.6116X
11 Kres12	0.5098X	35 Bres9	0.4647	59 Fres12	0.5128X
12 Kres13	0.4903	36 Bres12	0.6729X	60 Fres13	0.4924
13 Jres1	0.6973X	37 Bres17	0.3631	61 Fres14	0.6105X
14 Jres6	0.6961X	38 Bres18	0.4814	62 Fres18	0.5984X
15 Jres8	0.7279X	39 Hres1	0.8150X	63 Fres19	0.6018X
16 Jres9	0.6648X	40 Hres5	0.7234X	64 Eres2	0.7242X
17 Jres13	0.6699X	41 Hres6	0.7122X	65 Eres3	0.6317X
18 Jres14	0.6349X	42 Hres7	0.7143X	66 Eres4	0.6314X
19 Jres15	0.8571X	43 Hres11	0.6477X	67 Eres5	0.5734X
20 Jres16	0.6348X	44 Dres5	0.5997X	68 Eres6	0.6317X
21 Jres18	0.8759X	45 Dres6	0.6919X	69 Eres7	0.4361
22 Jres24	0.6928X	46 Dres7	0.5235X	70 Eres8	0.6092X
23 Cres7	0.6651X	47 Dres10	0.7945X	71 Eres9	0.5398X
24 Gres4	0.6599X	48 Dres13	0.4546		
				% expl.Var.	40

### Factor Array Retirement Housing 5 Years' Tenure or Over – Single Centroid

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	34	3	13	2	11	7	4	10	5	16	21	1
35	38	26	33	18	19	9	8	15	6	28	24	17
		49	37	20	22	12	25	27	14	31		
			47	36	30	23	40	29	48			
				41	46	39	43	42				
					50	45	44					

**Table A22.2: Retirement Housing Comparison of Second Order Perspectives and 1 Centroid Solutions for Participants with Tenure Under 5 Years or 5 Years and Over.**

#		P1	P2	<5 years	≥5 years
1	A court manager to turn to if you need help and advice	4	6	5	6
2	A resident manager or warden who lives on-site	-4	2	-2	-2
3	A court manager who is only employed on a part-time basis	-3	-5	-4	-4
4	Close to shops, amenities and transport	2	1	2	1
5	No need to worry about maintenance and repairs	3	3	3	3
6	Repairs or problems are addressed and fixed quickly	3	3	2	3
7	The appearance of the Court creates a good impression	0	0	0	0
8	Companionship of neighbours so you are never lonely	0	2	0	1
9	Use of a communal lounge and other shared facilities	-1	1	0	0
10	Peace of mind that comes from being looked after	-1	4	1	2
11	Living around people of a similar age and outlook	-1	0	-1	-1
12	Occupancy restricted to only retired people aged over 65	-3	1	-2	0
13	Residents are able to have dogs, cats or other pets	1	-4	-3	-3
14	Having security of tenure	5	2	3	3
15	A communal laundry room with washers and dryers	2	1	2	2
16	An effective and efficient heating and hot water system	4	4	4	4
17	Feeling safe and secure	6	5	6	6
18	A garden or balcony so you can sit out in private	1	-2	-1	-2
19	Social events and activities to get involved in	-2	-1	-1	-1
20	Availability of a good internet connection and/or wifi	2	-3	-2	-2
21	Pull-cord or pendant to summon help in an emergency	1	4	4	5
22	Sufficient car parking spaces	0	-2	-1	-1
23	Community spirit and friendship with people of similar age and outlook	0	0	1	0
24	You have your own home with your own front door	6	6	6	5
25	In a nice area with attractive surroundings	0	1	1	1
26	Being seen as a form of care home	-6	-4	-5	-4
27	Freedom to live as you choose: no requirement to join in or conform	3	2	3	2
28	Independent living	4	3	4	4
29	Able to have your say and raise matters with senior management	1	0	1	2
30	Residents are engaged and able to exercise choice and control	0	-2	0	-1
31	Residents are treated with dignity and respect	5	5	5	4
32	Some other residents behave badly	-6	-6	-6	-6
33	Residents who take control and assume responsibility for organising things	-4	-2	-3	-3
34	People don't respect privacy or confidentiality	-5	-5	-5	-5
35	Gossip spreads quickly	-5	-6	-6	-6
36	Residents with dementia or who need to be looked after	-2	-2	-2	-2
37	Living in close proximity to others in a compact community	-3	-3	-3	-3
38	Small flats	-4	-4	-4	-5
39	Properties and facilities that are modern and well designed	1	-1	1	0
40	Buildings and gardens are kept clean and tidy	2	0	2	1
41	Contemporary kitchens and bathrooms	-1	-1	0	-2
42	Checks on fire, electrical, gas, asbestos and water safety	3	2	2	2
43	Everyone is kept informed and up to date about local plans and activities	-1	1	0	1
44	Information about costs and charges is correct, clear and comprehensive	2	0	1	1
45	Wide doors, that are easy to open, for people with reduced mobility	-2	-1	-1	0
46	A reliable lift	-2	-1	-1	-1
47	A suitable storage area for buggies and other large items	-2	-3	-3	-3
48	Good staff who provide consistency of service	1	3	3	3
49	Common lounge used by external organisations and groups	-3	-3	-4	-4
50	Guest room available for visitors	-1	-1	-2	-1

**Colour Code**

23	Insufficient evidence of difference between Perspectives or Age Categories
11	Inconclusive evidence of relationship between Perspective 1 : <75 and Perspective 2 : ≥ 75

1	Possible relationship between Perspective 1 : <75 and Perspective 2 : ≥ 75
15	Inconsistent with relationship between Perspective 1 : <75 and Perspective 2 : ≥ 75

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**Appendix 23**

**Male and Female Single Centroid Arrays for  
Extra Care and Retirement Housing**

## Extra Care – Males (Single Centroid)

### Factor Matrix with an X Indicating a Defining Sort

1	5	Res6	0.6927X
2	5	Res7	0.6325X
3	5	Res9	0.7943X
4	5	Res12	0.6845X
5	5	Res14	0.8128X
6	5	Res19	0.7386X
7	4	Res3	0.7511X
8	4	Res4	0.5189X
9	4	Res5	0.5588X
10	4	Res7	0.6820X
11	4	Res9	0.7337X
12	1	Res3	0.6184X
13	1	Res5	0.3513
14	1	Res7	0.6919X
15	1	Res13	0.5210X
16	1	Res14	0.8386X
17	3	Res4	0.8439X
18	3	Res6	0.6214X
19	3	Res10	0.7337X
20	3	Res13	0.6559X
21	2	Res4	0.5404X
22	2	Res5	0.7813X
23	2	Res6	0.7188X
24	2	Res7	0.7315X
25	2	Res9	0.6685X

% expl.Var.                    47

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
35	34	12	33	50	4	15	46	6	21	28	17	51
32	3	38	49	36	8	25	43	42	14	48	24	1
		26	53	13	41	52	44	27	45	31		
			37	54	22	30	29	10	16			
				2	11	18	9	5				
					20	19	39					
					47	7	23					
						40						



## Extra Care – Females (Single Centroid)

### Factor Matrix with an X Indicating a Defining Sort

1	5	Res1	0.7235X	23	1	Res9	0.7487X
2	5	Res2	0.7067X	24	1	Res10	0.6496X
3	5	Res3	0.7324X	25	1	Res11	0.6861X
4	5	Res4	0.4854	26	1	Res12	0.7462X
5	5	Res5	0.7152X	27	1	Res15	0.7382X
6	5	Res8	0.7697X	28	5	Res20	0.8728X
7	5	Res10	0.8805X	29	5	Res21	0.8231X
8	5	Res11	0.8738X	30	3	Res1	0.8056X
9	5	Res13	0.2548	31	3	Res2	0.7960X
10	5	Res15	0.7059X	32	3	Res3	0.8268X
11	5	Res16	0.7888X	33	3	Res5	0.7248X
12	5	Res17	0.5836X	34	3	Res7	0.6215X
13	5	Res18	0.6944X	35	3	Res8	0.8531X
14	4	Res1	0.7917X	36	3	Res9	0.8174X
15	4	Res2	0.8121X	37	3	Res11	0.6660X
16	4	Res6	0.7175X	38	3	Res12	0.6091X
17	4	Res8	0.8280X	39	3	Res14	0.5458X
18	1	Res1	0.5398X	40	2	Res1	0.1127
19	1	Res2	0.6251X	41	2	Res2	0.6339X
20	1	Res4	0.7719X	42	2	Res3	0.6969X
21	1	Res6	0.5961X	43	2	Res8	0.6953X
22	1	Res8	0.5780X				
						% expl.Var.	50

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
35	26	12	49	54	11	23	6	46	28	31	21	17
32	34	38	13	50	53	43	29	42	27	24	1	51
		3	37	33	4	7	19	14	10	48		
			20	22	47	40	52	45	16			
				2	18	15	25	5				
					41	39	30					
					36	9	44					
						8						

## Retirement Housing – Males (Single Centroid)

### Factor Matrix with an X Indicating a Defining Sort

1	Ires1	0.6360X	31	Gres12	0.5968X
2	Ires2	0.7276X	32	Bres4	0.4442
3	Ires3	0.4049	33	Bres9	0.4722
4	Ires5	0.4716	34	Bres11	0.6879X
5	Ires6	0.6920X	35	Bres13	0.6954X
6	Ires7	0.5456X	36	Bres18	0.5219X
7	Ares7	0.5960X	37	Hres1	0.8359X
8	Ares10	0.6346X	38	Hres6	0.6606X
9	Kres1	0.7515X	39	Hres11	0.6399X
10	Kres3	0.5366X	40	Hres12	0.4362
11	Kres4	0.6807X	41	Dres4	0.5524X
12	Kres5	0.6515X	42	Dres6	0.7351X
13	Jres1	0.7488X	43	Dres10	0.7747X
14	Jres2	0.5300X	44	Dres11	0.3667
15	Jres10	0.5855X	45	Fres2	0.5972X
16	Jres12	0.7646X	46	Fres4	0.7631X
17	Jres13	0.6786X	47	Fres5	0.4889
18	Jres14	0.5700X	48	Fres7	0.5649X
19	Jres20	0.6165X	49	Fres8	0.6554X
20	Jres23	0.7973X	50	Fres11	0.5706X
21	Jres24	0.6526X	51	Fres14	0.5826X
22	Cres2	0.7422X	52	Fres15	0.8284X
23	Cres3	0.4970	53	Fres18	0.6237X
24	Cres4	0.7530X	54	Fres20	0.2648
25	Cres5	0.6410X	55	Eres7	0.4288
26	Cres8	0.5393X	56	Eres9	0.4946
27	Gres1	0.5925X			
28	Gres7	0.4675	% expl.Var.		38
29	Gres8	0.6471X			
30	Gres10	0.6249X			

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
32	26	49	37	20	45	43	29	48	1	31	14	24
35	34	3	13	46	18	10	39	15	6	16	28	17
		38	47	19	50	8	40	44	27	5		
			33	2	11	41	25	21	42			
				36	12	23	7	4				
					9	30	22					

## Retirement Housing – Females (Single Centroid)

### Factor Matrix with an X Indicating a Defining Sort

1 Ires4	0.6216X	37 Cres1	0.5553X	73 Dres2	0.7507X
2 Ires8	0.7528X	38 Cres6	0.6610X	74 Dres3	0.7656X
3 Ires9	0.6611X	39 Cres7	0.6862X	75 Dres5	0.6184X
4 Ires10	0.2053	40 Cres9	0.8029X	76 Dres7	0.5197X
5 Ares1	0.7549X	41 Gres2	0.6500X	77 Dres8	0.5684X
6 Ares2	0.8078X	42 Gres3	0.7183X	78 Dres9	0.7643X
7 Ares3	0.7407X	43 Gres4	0.6480X	79 Dres12	0.7855X
8 Ares4	0.6451X	44 Gres5	0.7812X	80 Dres13	0.4822
9 Ares5	0.5561X	45 Gres6	0.6062X	81 Dres14	0.7719X
10 Ares6	0.6967X	46 Gres9	0.5870X	82 Dres15	0.6342X
11 Ares8	0.6427X	47 Gres11	0.3515	83 Dres16	0.7081X
12 Ares9	0.6298X	48 Cres13	0.6275X	84 Fres1	0.3763
13 Kres2	0.5630X	49 Bres1	0.6429X	85 Fres3	0.6116X
14 Kres6	0.4705	50 Bres2	0.5597X	86 Fres6	0.6135X
15 Kres7	0.6790X	51 Bres3	0.5743X	87 Fres9	0.7122X
16 Kres8	0.6395X	52 Bres5	0.6571X	88 Fres10	0.5660X
17 Kres9	0.6641X	53 Bres6	0.7093X	89 Fres12	0.5107X
18 Kres10	0.8310X	54 Bres7	0.6872X	90 Fres13	0.5092X
19 Kres11	0.6230X	55 Bres8	0.6255X	91 Fres16	0.6063X
20 Kres12	0.5286X	56 Bres10	0.7877X	92 Fres17	0.3169
21 Kres13	0.5080X	57 Bres12	0.6422X	93 Fres19	0.5898X
22 Jres3	0.6842X	58 Bres14	0.5648X	94 Fres21	0.6275X
23 Jres4	0.7976X	59 Bres15	0.6187X	95 Eres1	0.7160X
24 Jres5	0.5297X	60 Bres16	0.7107X	96 Eres2	0.7082X
25 Jres6	0.6838X	61 Bres17	0.3707	97 Eres3	0.6158X
26 Jres7	0.7609X	62 Hres2	0.6366X	98 Eres4	0.6295X
27 Jres8	0.7439X	63 Hres3	0.7082X	99 Eres5	0.5170X
28 Jres9	0.6795X	64 Hres4	0.7175X	100 Eres6	0.6158X
29 Jres11	0.4572	65 Hres5	0.7254X	101 Eres8	0.5928X
30 Jres15	0.8544X	66 Hres7	0.7427X		
31 Jres16	0.6265X	67 Hres8	0.7138X	% expl.Var.	42
32 Jres17	0.4734	68 Hres9	0.7868X		
33 Jres18	0.8978X	69 Hres10	0.6823X		
34 Jres19	0.5676X	70 Hres13	0.6720X		
35 Jres21	0.7272X	71 Hres14	0.3852		
36 Jres22	0.6695X	72 Dres1	0.7273X		

### Factor Array

-6	-5	-4	-3	-2	-1	0	1	2	3	4	5	6
35	34	49	36	41	19	43	40	5	48	31	24	17
32	26	3	33	12	46	44	8	42	27	28	21	1
		38	37	2	45	7	25	10	6	16		
			13	20	50	39	4	15	14			
				47	18	11	29	9				
					22	30	23					

**Table A23.1: Comparison of Single Centroid Perspectives for Male and Female Participants in Extra Care and Retirement Housing.**

#		EC Male	EC Female	RH Male	RH Female
1	A court manager to turn to if you need help and advice	6	5	3	6
2	A resident manager or warden who lives on-site	-2	-2	-2	-2
3	A court manager who is only employed on a part-time basis	-5	-4	-4	-4
4	Close to shops, amenities and transport	-1	-1	2	1
5	No need to worry about maintenance and repairs	2	2	4	2
6	Repairs or problems are addressed and fixed quickly	2	1	3	3
7	The appearance of the Court creates a good impression	0	0	1	0
8	Companionship of neighbours so you are never lonely	-1	0	0	1
9	Use of a communal lounge and other shared facilities	1	0	-1	2
10	Peace of mind that comes from being looked after	2	3	0	2
11	Living around people of a similar age and outlook	-1	-1	-1	0
12	Occupancy restricted to only retired people aged over 65	-4	-4	-1	-2
13	Residents are able to have dogs, cats or other pets	-2	-3	-3	-3
14	Having security of tenure	3	2	5	3
15	A communal laundry room with washers and dryers	0	0	2	2
16	An effective and efficient heating and hot water system	3	3	4	4
17	Feeling safe and secure	5	6	6	6
18	A garden or balcony so you can sit out in private	0	-1	-1	-1
19	Social events and activities to get involved in	0	1	-2	-1
20	Availability of a good internet connection and/or wifi	-1	-3	-2	-2
21	Pull-cord or pendant to summon help in an emergency	3	5	2	5
22	Sufficient car parking spaces	-1	-2	1	-1
23	Community spirit and friendship with people of similar age and outlook	1	0	0	1
24	You have your own home with your own front door	5	4	6	5
25	In a nice area with attractive surroundings	0	1	1	1
26	Being seen as a form of care home	-4	-5	-5	-5
27	Freedom to live as you choose: no requirement to join in or conform	2	3	3	3
28	Independent living	4	3	5	4
29	Able to have your say and raise matters with senior management	1	1	1	1
30	Residents are engaged and able to exercise choice and control	0	1	0	0
31	Residents are treated with dignity and respect	4	4	4	4
32	Some other residents behave badly	-6	-6	-6	-6
33	Residents who take control and assume responsibility for organising things	-3	-2	-3	-3
34	People don't respect privacy or confidentiality	-5	-5	-5	-5
35	Gossip spreads quickly	-6	-6	-6	-6
36	Residents with dementia or who need to be looked after	-2	-1	-2	-3
37	Living in close proximity to others in a compact community	-3	-3	-3	-3
38	Small flats	-4	-4	-4	-4
39	Properties and facilities that are modern and well designed	1	0	1	0
40	Buildings and gardens are kept clean and tidy	0	0	1	1
41	Contemporary kitchens and bathrooms	-1	-1	0	-2
42	Checks on fire, electrical, gas, asbestos and water safety	2	2	3	2
43	Everyone is kept informed and up to date about local plans and activities	1	0	0	0
44	Information about costs and charges is correct, clear and comprehensive	1	1	2	0
45	Wide doors, that are easy to open, for people with reduced mobility	3	2	-1	-1
46	A reliable lift	1	2	-2	-1
47	A suitable storage area for buggies and other large items	-1	-1	-3	-2
48	Good staff who provide consistency of service	4	4	2	3
49	Common lounge used by external organisations and groups	-3	-3	-4	-4
50	Guest room available for visitors	-2	-2	-1	-1
51	Care staff on-site 24 hours 7 days a week if needed (EC)	6	6		
52	An on-site restaurant (EC)	0	1		
53	Hairdressing salon on-site (EC)	-3	-1		
54	An accessible bath for those that want or need it (EC)	-2	-2		