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Forewords



Having a decent, affordable home in a safe, well-designed neighbourhood is the foundation of a happy, healthy life. But we don't have sufficient homes to support our population, many of our current homes are substandard, and plans for new homes and places pay insufficient attention to people's long-term quality of life.

35% of the UK population rent their homes, with 19% in the private rented sector and 16% in social housing. Currently, too many homes in the sector are classified as non-decent, with poor health outcomes for residents, but up to 1 million additional rental homes are needed by 2031, and there is an imperative for the sector to deliver more of the homes we need and to ensure better outcomes for residents. To realise this potential, we need more and better social housing, but the private rental sector can and must play its part.

At the Quality of Life Foundation, we wanted to understand whether the build-to-rent (BTR) sector, where homes are built and professionally managed, might contribute to a different model and narrative for private renting. Build-to-rent investors, developers and operators are necessarily more customer-focused, with a business need to develop longer term relationships with their tenants. The first large scale build-to-rent operator in the UK - Get Living - was founded in 2013, and Greystar also entered the UK market in 2013 as an already established build-to-rent operator both paving the way for further investment in this sector. A little over a decade on, the sector currently accounts for only 2% of the private rented sector, but that percentage is growing. 120,000 homes have been completed and 50,000 are under construction. Investment is also diversifying, addressing the broader rental market.

We wanted to explore whether and how build-to-rent developments benefit both residents and the wider neighbourhood, using both objective metrics and qualitative feedback from residents and the local community.

This report represents our first steps in understanding the social impact of the build-to-rent sector. It is a significant collaboration between the British Property Federation, the

Association for Rental Living, and three prominent build-to-rent developers/operators: GetLiving, Greystar and Longharbour/Way of Life.

The report offers an example of what can be learned when the private sector comes together to share insights and improve the way it does business through understanding its impact, and provides a model that we hope can be replicated across the housing sector.

We do not claim that build-to-rent is 'the answer' to the housing crisis we face - that lies ultimately in a mix of new and refurbished homes and neighbourhoods that include social housing, homes for rent, community-led housing and private renting - but we believe that build-to-rent is part of the answer. And the fact that the sector is willing to open itself to scrutiny through talking to residents and asking them what they think and feel is something that we both commend and recommend others to do, too.

As for the results... I will let the insights and recommendations speak for themselves.

Matthew Morgan
Director
Quality of Life Foundation



The build-to-rent sector stands at a critical juncture, presenting a key solution to both the UK's housing crisis and the fragmented private rental sector, where over 98% of stock is currently owned by individual landlords or small corporate entities.

The private rental sector is plagued with reports of homes that are ill-maintained, substandard, and fall short of expectations, leaving tenants underserved. BTR presents a unique opportunity to raise the bar, offering professionally managed, high-quality housing that can set new standards across the market. But BTR's true potential lies in its ability to go further - to connect housing with health, wellbeing, and the broader social fabric.

To fully realise this, we must continually challenge ourselves. Are we truly delivering on our promise to enhance quality of life, not just for residents, but for the surrounding communities? Are we thinking about long-term stewardship, sustainability, and the wider social impact of our developments?

Many working within BTR can see the positive impact their work is having, but it is essential that we partner with independent organisations like the Quality of Life Foundation to gain a sector-wide, unbiased perspective on what we're doing well - and more importantly, where we can improve.

This report reinforces the potential of BTR to create healthier, happier, and more connected neighbourhoods, with the majority of residents reporting that their homes positively impact their wellbeing. As the sector evolves and diversifies to meet varied needs, maintaining a long-term vision of quality, sustainability, and community integration will be key to ensuring BTR continues to set new standards in housing.

Theo Plowman
Assistant Director
British Property Federation (BPF)



The Quality of Life Foundation build-to-rent social impact report is a very welcome addition to the sector's discourse. It strengthens the narrative, and provides additional proof, that build-to-rent offers good quality homes, actively promotes community, and that resident wellbeing is core to BTR culture.

This report demonstrates that simply providing a home is not enough. It is the relationships that the home, and its occupants, can establish with the people, places, and enterprises around them that delivers improved and sustained wellbeing. BTR's professional approach to resident and community support, for the long-term, along with its strong commitment to quality, is the sector's value add and cements its importance in the UK's housing tenure mix of today and tomorrow. Cultivating community as core to BTR, one of the seven principles of the BTR Code of Practice presented by the ARL to the sector, further reinforces this belief.

The social value benchmarks highlighted in the Quality of Life Foundation BTR social impact report provide clear and measurable data points and have the potential to become sector standards. The report's recommendations are deliverable and point the way to the next generation of BTR homes and communities.

Brendan Geraghty
CEO
The Association for Rental Living (ARL)



Forewords

Executive summary

This report presents the findings of three resident and community evaluations conducted at build-to-rent (BTR) developments by the Quality of Life Foundation during summer 2024. In collaboration with the British Property Federation (BPF) and The Association for Rental Living (ARL), the study examined experiences across three developments by Get Living, Greystar, and Longharbour/Way of Life, drawing on insights from 297 residents and community members.

The research reveals how build-to-rent developments can enhance residents' health and wellbeing while contributing positively to their wider communities. It underscores the social value of build-to-rent housing and provides robust evidence to help shape local and national policy, ensuring the sector continues to deliver meaningful benefits and acts on the recommendations outlined to continue improving its offer.

The purpose of this report

This research and report is an independent evaluation of the social impact of BTR, aiming to add to the evidence base and share good practice. It was carried out through a collaboration with the British Property Federation (BPF), who wanted to provide evidence for the potential benefit of BTR to residents and the wider community, and the Association for Rental Living (ARL), who wanted to understand how BTR might act as a rental anchor for regeneration.

We then approached developers and operators within the BTR sector, with a lead taken by Get Living, who were then joined by Greystar and Longharbour/Way of Life.

By framing the insights drawn in this report through the evidence-based Quality of Life Framework, this research highlights opportunities for the sector to enhance long-term health and wellbeing outcomes for both residents and the surrounding community. This includes how BTR developments can foster greater social interactions, how the BTR model can align with principles of stewardship, and how ongoing engagement and cultural activities can benefit both residents and the wider community. We hope that the collaborative nature of the project might also demonstrate how the property sector more broadly can promote a more holistic, long-term approach to housing and neighbourhoods, prioritising communities and health and wellbeing.

How we did it

This project was guided by The Quality of Life Framework, which is made up of six themes that are essential in understanding how to create happier and healthier neighbourhoods and communities. To gather data, we spoke to residents at each of the sites, running an online survey and carrying out face-to-face visits to gather feedback from both the residents and the wider community. This data was analysed in tandem with the desk research that we carried out to get a fuller understanding of each site and its context.

Each site was an example of 'multi-family housing', which effectively means apartments, but each reflected a different form of BTR development in terms of scale, location, amenities and interaction with its immediate and wider context. Therefore each site has its own strengths in providing for both residents and the wider community. These differences inform the types and scale of social impact that each site can have, and in this report we have focused on each site's individual qualities and contributions to social impact in their areas, in order to allow for this difference. With this in mind, we set out some recommendations for the wider industry based on what we learnt.



The sites

The sites

East Village

Developer: Get Living
Homes: 2,445
Location: Stratford, E20
Governance: Newham Council

Originally delivered to house the athletes taking part in London's edition of the Olympic games, East Village has since been expanded and transformed into a large community in the former industrial landscape. It is anchored by a broad range of cafes and bars at ground level, home to over 30 independent retailers as well as Chobham Academy, a health-centre and a dentist, alongside a broad range of both public and private green spaces.

East Village's proximity to the Queen Elizabeth Olympic Park and Westfield Shopping makes it well connected to both shops and green and blue space. Both are major assets, providing world class sports and leisure facilities, open space and shopping within walking distance of the development. The development's proximity to the Stratford

transportation hub allows for easy access to areas further out from the immediate neighbourhood. Connectivity is possible via the DLR, Overground, Elizabeth, Central, Jubilee and National lines.

East Village is the most established neighbourhood of those that we looked at, with the first residents having moved in in 2013. A third of residents we surveyed had lived in East Village for three years or more.



The sites

Greenford Quay

Developer: Greystar
Homes: 1,965
Location: Greenford, Ealing, UB6 0FP
Governance: Ealing Council

Situated in West London, Greenford Quay is built on the site of a former pharmaceutical laboratory, which blocked access for the surrounding neighbourhood. Delivering just under 2,000 homes, it is bisected by the Grand Union Canal, and provides a selection of ground floor units that are currently let out by a Co-operative supermarket and a Starbucks cafe. It's a site that is well connected to London, with Sudbury Hill (Piccadilly Line) to the north and Greenford (Central Line) to the south.

Immediately surrounding the site, the neighbourhood is relatively low-density housing, with a few industrial units (mostly distribution centres) directly to the south and

south-west of the site. To the east of Greenford Quay is the Horsenden Hill Nature Reserve, the largest single nature conservation site in the Borough of Ealing.

The first block at Greenford Quay, Tillermans Court, opened in 2020, with more residents moving into the next block, Lyons Dock, in 2022. At the time of this research, residents were moving into the Glassworks building, and there were some vacant plots yet to be built on. These include many of the affordable homes that will be provided as part of the overall development.



Key findings

The sites

The Gessner

Developer: Long Harbour/Way of Life

Homes: 164

Location: 3 Watermead Way, Tottenham Hale, N17 9QZ

Governance: Haringey Council

Just a few minutes walk away from Tottenham Hale train station, The Gessner is a development in a busy area of Tottenham Hale. Providing just under 170 homes, office units and retail spaces, the development also provides a public square tucked away from the A1055 directly to the East. Residents at the Gessner have access to a rooftop garden, a fitness centre, co-working spaces and communal lounges.

A few minutes walk to the East is the Paddock Community Nature Park, a biodiverse site that is bordered by the River Lea, comprising woodlands, scrubs, meadows and ponds. To the North of the Gessner, Down Lane Park provides green spaces for play, providing outdoor gym equipment, tennis courts and a BMX track.

The Gessner is close to Tottenham Hale, a major transport hub for North London. It is serviced by the Victoria, National Rail and Stansted Express lines. Tottenham Hale Bus Station is also a major interchange, providing key connections within the area and beyond.

This was the smallest of the developments we surveyed. The Gessner welcomed residents in 2021, so it is also the most recent of the three sites, with 75% of the residents surveyed living at the site for less than a year. The Gessner provides some dwellings for key workers in the area, via Haringey Council.



Key findings

Resident feedback across East Village, Greenford Quay and The Gessner:

Residents liked

- The provision of high quality green spaces as amenities
- Year-round events and activities
- The maintenance and operation of their buildings and surrounding public spaces
- Play amenities for children and young people

Wider communities liked

- Being able to make the most of the events and activities that are taking place in and around BTR developments
- The improved walkability and cycling infrastructure of areas surrounding developments

Residents disliked

- Lack of social amenities (cafes, shops, supermarkets) especially affordable options
- Overheating in the summer
- Noise from surrounding areas affecting mental health

Wider communities disliked

- Additional noise and traffic around BTR developments
- Perceptions of higher crime rates in and around developments

On average, residents were more satisfied with their accommodation compared to national reports

88.5%

Satisfaction with accommodation

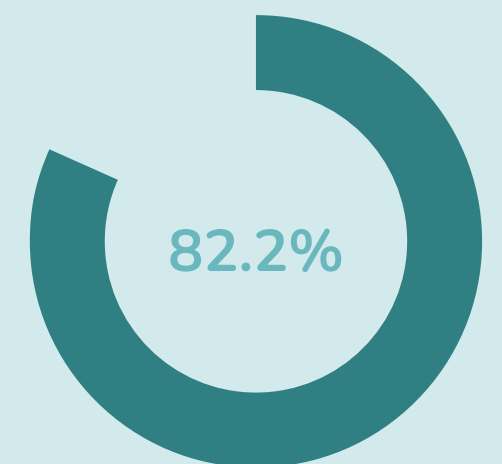
vs

81.8%

National average of satisfaction with accommodation in private rental sector (2022-23)



Impact on health and wellbeing



Of residents felt that their homes had a positive impact on resident health and wellbeing

Key findings

"It's more fun and active than other places. The fountains and canoeing are fun, the park is nice to walk to. There are cool activities"

Female, 16-19 years old

"It feels very safe and secure and a place I love to come back to"

Female, 40-44 years old

"Being close to the canal and water and also Horsenden Hill with fantastic views does calm me and helps me to relax after a difficult week"

Female, 40-44 years old

"...a lovely place with a canal view and plenty of spots to sit and relax during free time. The staff does their best to make everyone happy and organises entertaining events and social gatherings for residents. Additionally, a lot of effort is put into day-to-day maintenance, which is much appreciated."

Male, 35-39 years old

"Green spaces do help mental and physical health. However, these areas feel a lot less safe in recent times and I've become reluctant to go out alone."

No demographic information

"The lack of small shops nearby leads to everyone with a car driving a lot and those without, overspending on big brands at Co-op/Starbucks."

Male, 25-29 years old

"There are great healthy food outlets and a lot of open space/gyms to exercise. There is a lot of calming green space and the area itself feels inviting."

Male, 35-39 years old

"The increasing and ongoing noises from the streets around the building where I live. It's nearing an unbearable level."

Male, 65-69 years old

Key findings

Key findings

From this research, it is clear that BTR can provide positive outcomes for residents and wider communities alike. The findings looked at the feedback from residents with even weighting across the Quality of Life themes, which provides a general overview of the picture at these sites. Further research, with a larger scope and consideration of weighting based on key, site-specific factors, will be essential in helping build the case further.

We also found that BTR can create better health and wellbeing outcomes for both residents and the wider community, with the potential for creating more cohesive communities.

82.2%
of BTR residents that we spoke to said that their homes positively impact their health and wellbeing.

These positive impacts come from:

▶ The quality of the outdoor green and natural spaces

In our research, we found that the provision of green and natural spaces provided a net positive impact on both residents and members of the wider community, especially when those sites are well maintained and carefully integrated into the landscape.

▶ The delivery of high-quality spaces for people of all ages

The provision of well-maintained, high-quality indoor and outdoor spaces for children and young people has been consistently well-valued by residents and the local community. This is an additional benefit of BTR developments, as many of the current standard housing developments around the UK overlook the needs of children and young people.

▶ The provision of inclusive and engaging events and activities

Programming activities to allow communities to engage with the site was a positive in some of the sites surveyed, and contributes to helping communities feel more connected with each other. Further investment into this would provide even more net positive impact.

▶ The improved mobility and connectivity

Through the provision of walking, wheeling and cycling infrastructure at each of the sites, residents and the wider community felt that they were able to get around more easily. Improved connectivity through and across BTR developments can not only have a net positive impact on health and wellbeing, but it can also stimulate the local economy.

Further improvements to the impact of BTR developments could be made by addressing:

▶ The thermal performance of homes

Across all sites, residents expressed concern about the temperature inside their homes, particularly in managing warmer temperatures. Although this was seen as a positive during the colder winter months, residents felt strongly that this was an issue in the warmer summer months. This issue is not limited to build-to-rent apartments, but their typology and the increasing occurrence of more extreme weather events due to the effects of climate change do present a challenge for the residential sector.

▶ The mixture of amenities provided at each site

Whilst the provision of amenities is seen as a net positive for residents across these sites, residents and the wider community would benefit from the provision of more specific amenities. In some instances, this referred to the need for cheaper stores from which to purchase everyday essentials, in others it referred to core elements of social infrastructure such as a local doctor's surgery.

▶ Safety in public space

Concerns around safety at night were common across all three sites, and could be tackled through more specific design-led interventions which prioritise strategic lighting, route choices and maximising "eyes on the street" when designing ground floor and public-realm interfaces. But tackling this issue will require a deeper and more nuanced understanding of the factors that lead to perceptions of higher crime rates in these contexts, first and foremost.

Key findings

In our report, we outline recommendations that build on the positive feedback and address the challenges that we received from residents and the wider community. These recommendations are articulated to speak to the wider BTR industry, as well as the sites surveyed.

Assessment of social impact across all three sites

Each of the three sites we surveyed provided a different offer when it comes to social impact. Across the board, the provision of high quality, well-maintained, biodiverse green and natural spaces, alongside the provision of well designed, walkable streets, was a common net positive social impact. These characteristics not only improved resident satisfaction and wellbeing, but did the same for the wider community in each instance.

Positive social impact was also achieved through the provision of:

- Space for local community initiatives at or below cost
- Funding and active partnerships for and with local initiatives, businesses and groups
- Engaging programming for residents and the wider community (catering to all ages)

Further research

Following the publication of this report, we would like to see whether some of the measures we have used might form the basis for consistent evaluation of the lived experience of residents and local communities in and around build-to-rent homes.

We would also like to carry out further research, expanding the evidence-base on the impact of BTR developments, including 'single-family' (family homes), later living and student accommodation.

We would like to carry out research into how well BTR can support existing social infrastructure and how well it can address local needs, including the provision of affordable housing, which is one of the most significant challenges facing the BTR sector - and the UK housing market as a whole. The demographic profile of the BTR residents who took part in our research skewed towards higher earners; nearly 65% of respondents had a household annual income over £50,000 annually. Further research could explore how BTR developments through partnership with local authorities or housing associations can ensure that BTR developments are financially accessible to a diverse range of people.

This further research would allow us to provide more specific recommendations and to build a more accurate picture of the potential that BTR has to provide a greater number of positive impacts on health and wellbeing of both residents and their surrounding communities.



Recommendations

Based on the findings, we've made a list of recommendations for future BTR schemes that will help maximise the positive social impact on residents and the wider community. For the full list of recommendations, please refer to page 43.

1 Maintain the provision of high quality communal and public space, supported by hosted events

2 Continue to deliver high-quality green and blue infrastructure spaces as health assets in future schemes

3 Continue to provide high-quality play spaces for children and young people

4 Improve building and public space design to create greater resilience to the increased impacts of climate change.

5 Create opportunities for more cafes, shops and supermarkets, especially affordable options.

6 Find new ways to reduce neighbourhood noise and high volumes of traffic from surrounding areas

7 Create more opportunities for improved walkability and cycling infrastructure in the areas surrounding developments

8 Address perceptions of higher crime rates in and around developments

Methodology



Desk research

At the beginning of the project, we undertook desk research to understand the local context for each site. This included a review of local socio-economic data and census data and a review of local amenities, green and blue spaces, social infrastructure and facilities.

Catchment areas

To understand the impact that these developments have on the wider community, we defined a catchment area based on walking distance from each site. This measurement was determined based on the distance of a 15-minute walk from the centre of each site, a distance based on the notion that everyone should have access to everything they need on a day-to-day basis within their immediate neighbourhood by walking or wheeling. Once this perimeter was established, we identified key stakeholders and organisations within and around this area to begin the process of reaching out to the wider community.

Social impact

To evaluate the social impact of each site, we considered the provision of various types of amenities and infrastructure and how they have been addressed by residents and the local community in their feedback. The aim was to understand not only what has been delivered as part of each development, but also to understand how residents and the wider community perceive its impact - be it positive or negative.

This approach aims to understand the outcomes of the BTR development, mapping amenities alongside feedback from residents and the wider community to highlight the benefits and challenges that have arisen from these projects. The process of reviewing these facilities and amenities varies from site-to-site, and this report serves as the starting point for the development of a more comprehensive methodology to understand the overall social impact of BTR development on homes and neighbourhoods.



Why carry out post-occupancy evaluation?

Post-occupancy evaluation provides valuable insights into people's experience of living in homes and neighbourhoods, and offers evidence-based recommendations to developers, giving them tools for future improvements. It offers a platform for showcasing social impact, validating community investments, mitigating risks tied to unsustainable spaces and nurturing trust among stakeholders.

The benefits include:

- **Insight:** Unearth resident attitudes through independent analysis and recommendations
- **Project clarity:** Use insights gained to communicate effectively with landowners and authorities
- **Responsive strategies:** Stay ahead by aligning with evolving market trends through ongoing analysis
- **Benchmarking:** Simplify internal reporting with user-friendly metrics

The Quality of Life Framework

This project was guided by The Quality of Life Framework, which comprises six themes that evidence shows are essential in helping create happier and healthier neighbourhoods and communities. These themes show

up consistently throughout our work, and are the lens through which we categorised the questions and subsequent data that we've collected in this report. The six themes are as follows:

A sense of control - When we feel a sense of control in our lives, we are better equipped to overcome any challenges we might encounter. Having the ability to improve our area and address local problems can give us a sense of stability and security. Our neighbourhoods should provide us all, including underrepresented groups, with the opportunity to get involved in how decisions are made and set down roots in the long term.

Health equity - Our health is crucial to our quality of life. Overcrowding, damp and mould within homes are all detrimental to health and wellbeing and can affect some communities more than others. The difference in life expectancy between the most and least affluent areas can be almost twenty years, even for adjacent neighbourhoods. Our housing and local environments should equitably support communities to pursue healthy lifestyles, no matter where they live.

Connection to nature - Many studies have shown that contact with nature is good for our mood and aids our recovery when we are ill, whether through interaction with our window boxes, local parks or countryside. Everyone from all parts of society should have better access to nature within their area, taking an active part in exploring and looking after it. People need homes to live, but their creation and care inevitably impact the natural environment, so in return, we must respect the environment in the way we construct our homes and neighbourhoods, particularly given the dual threats of climate change and biodiversity loss. The good news is that, by and large, a neighbourhood that is healthier for people will be healthier for the planet, too.

A sense of wonder - Happiness, fun and wonder make us human, and they play an important role in our quality of life. The physical expression of this is seen in the design of our homes and neighbourhoods - not simply the way they function, but the way they look and how they feel. In addition to this, having the ability to be creative and taking pride in cultural expression gives us all an opportunity to feel a sense of identity and pride in our community, and to open ourselves to a diverse range of cultures in turn. Importantly, play is also crucial to our health and wellbeing at any age, and having opportunities to play, pursue leisure and sporting activities is key to our physical and mental health.

Getting around with ease - There are significant health and wellbeing benefits to walking, wheeling and cycling, and public transport is crucial in maintaining equitable and resilient neighbourhoods. It is essential to have the ability to choose how to get around, based on needs, accessibility and affordability. That means providing people with the ability to get around using different options - by walking, cycling, using public transport or car shares, for example - and allowing equitable access to the same range of transport options. Having access to a car can contribute to people's quality of life, but when everyone owns a car, roads become noisy and unsafe, while parked cars clog our streets and overrun our pavements.

Connected communities - Belonging to a community is crucial to our personal, social and psychological wellbeing. Our local communities can provide a shared sense of identity, connection and purpose; can encourage the celebration of diversity, collective action and the sharing of resources across differing cultures and languages. Together, we can get to know our neighbours, chat to shopkeepers or just share a nod with fellow dog walkers. To facilitate this, local spaces need to enable a variety of social connections to emerge, while providing local job opportunities and a range of social services.

Outreach and engagement

There was a bespoke outreach and engagement approach for each site, taking into account the different site sizes and the contexts surrounding the development, as well as the different 'resident' and 'wider community' stakeholders.

As with all community consultation and engagement projects undertaken by the Foundation, methodologies are heavily influenced by our eight Code of Practice principles:

- Be accountable
- Be effective
- Be transparent
- Be inclusive
- Be timely
- Support mutual learning
- Demonstrate impact
- Publish feedback

In light of these principles, our outreach and engagement approach consisted of conducting digital surveys via the Commonplace online platform and in-person surveys via pop-up events. Two in-person events were arranged for each site, where we spoke with residents, the wider local communities and businesses to capture people's thoughts and feelings about where they live and the impact of new developments in their area. Outreach material dissemination, in-person engagement, and online data collection took place between June and the beginning of September 2024.

Often, multiple outreach and engagement activities took place throughout the day, for example: holding a pop-up stall to speak with residents alongside a letter-drop to businesses; or a door knocking exercise alongside attending a community event.

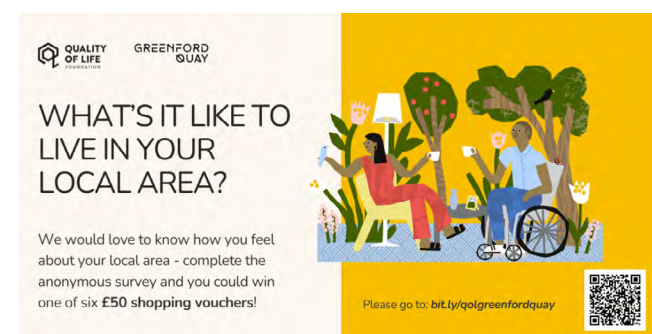
We targeted 4,574 addresses across the three sites, and a total of 297 people completed a survey with us. 34%, or 101, of these surveys were completed by the wider community, giving us a spread of around two-thirds residents, one-third wider community in the feedback.

We found residents at the site and the wider community responded best to the survey via social media or email pushes across all of the sites. However, we believe presence at the physical pop-ups was worthwhile to add credibility to the survey, to have more in-depth discussions with residents, and to provide a chance for local community residents who had not had a survey delivered to their email,

or who do not access the internet, in particular young and elderly people, to complete a paper survey with us. Around a third of survey contributions occurred on these in-person days.

It was important that we considered the accessibility of the survey, outreach materials and engagement activities, as well as the barriers to engagement. We aimed to understand diverse and quieter voices as well as the value of the project for local people and what they gained from the process. We adapted the survey for younger people aged 18 and under, used paper surveys for those less digitally inclined, and consolidated verbal, in-person answers.

We used a range of methods for outreach and engagement. An initial stakeholder mapping exercise highlighted primary, secondary and tertiary status stakeholders within the 15-minute walking radius surrounding the developments. Communication to stakeholders was prioritised accordingly and both digital and physical material was disseminated with the help of local leads, site managers, and communication and marketing colleagues from Way of Life, Greystar and Get Living. To incentivise participation, we offered a prize draw for survey respondents. Six £50 shopping vouchers were allocated randomly for respondents who completed the survey at the end of the engagement period.



Analysis and synthesis

Once the data was collected and the survey closed, we reviewed the feedback that we had received, aggregating both qualitative and quantitative data. In this, we sought to understand what were common points raised by both residents and the wider community at each site, and also looked to understand what issues were common across all three sites.

We reviewed data from residents at each site, evaluating the feedback based on the Quality of Life Framework themes and sub-themes. We highlighted key statistics and data, going into more detailed analysis of the data for each section based on the feedback.

The wider community feedback was more qualitative in nature, but followed the same format. Although data and results from the wider community feedback is used in the analysis, it is important to note that this dataset is largely for comparison, and care should be taken when using the quantitative data from the wider community in order to draw wider conclusions. This is particularly because at each of these sites, the wider community residents that fell within the catchment area for each of these sites outnumbered that of residents at each development. Our engagement and outreach approach prioritised the feedback from residents, due to limitations in scope, timeline and budget for the project. Further research into the impact that BTR developments have on the wider communities that they land in would be beneficial, to draw out more nuanced and richer insights. We would also like to flip the research from an 'inside out' to an 'outside in' approach that looks at how BTR can enhance existing social infrastructure and address local need.

Objectivity and independence

This project was carried out in collaboration with the BPF and ARL, alongside the developers who took part. The Quality of Life Foundation team had free reign to speak to residents and the wider community. We used both existing channels of communication from developers to get the word out about the surveys, as well as posters and pop-up events to canvas more widely.

Feedback and input from the developers had been limited to a few key stages in the process (outreach and engagement strategy, additional survey questions and report drafting) which did not influence the methodology. This industry report contains aggregated data from all three sites, which is a decision made to demonstrate common strengths and weaknesses in the sector, but more detailed reports for each site have been drafted and shared with each of the three sites' developers in order to ensure learnings are captured and acted upon by them.

Limitations

The research process faced a few limitations, which have been taken into account when writing and reporting the findings:

Sample size

For this project, we used simple random sampling, as we had a relatively short engagement window to capture feedback, and a relatively wide net to cast to gather data from both residents and the wider community.

Overall, the feedback from the research carried out was limited by the number of responses that we received across all three sites. Having obtained an overall percentage uptake of 4.3% of residents across all three sites, we were limited by how heavily we can lean on the data quantitatively. In response to this, we opted to use the quantitative feedback to direct us towards areas of particular interest, then delved into the qualitative feedback more heavily to explore those areas of interest further.

This was also the case for the wider community feedback, as the area defined at each of the three sites captured a population size several times larger than the population at each site, due to the density of the surrounding urban areas. The limitation in capturing and quantifying the data from the wider community here was managed by opting for fewer quantitative questions, and leading with more qualitative, open-ended questions.

The sample size obtained for residents at each site is relatively small, but is fairly representative of communities seen in BTR developments, particularly those in London. The sample size received from the wider community was a little more difficult to quantify, due to the relatively small numbers of feedback received at each site.

Site selection

The three sites were all selected by the developers, who each had chosen their sites based on a variety of criteria - some were selected based on their size, being larger in number of units and area, whilst another was selected for their proximity to key transport links. Another site, Greenford Quay, was selected due to its current phase in development, in order to allow the developer Greystar to understand if their approach is currently working.

It is key to note that this project did not set out to capture feedback only from developments within London, but this list of sites selected represents the concentration of BTR developments in the city, which accounts for roughly

Analysis and synthesis

43% of the UK's operational BTR developments. We would welcome working with BTR developer/operators in other locations across the UK to add to our findings.

Assumptions

Assumptions were mainly that responses from residents and the wider community would be answered truthfully. We also made the assumption that responses from residents were from actual residents at each development, and that responses from the wider community were also from said community. We anonymised responses to all questions to encourage honest feedback, but added non-identifiable, optional, demographic questions as part of the surveys for both groups as a countermeasure to make sure that this was the case, so we could quickly validate and filter those responses where necessary.

Another assumption we made in the analysis was around the ways in which we compared data from BTR residents with wider, national benchmarks. This was made with the assumption that these datasets are comparable, as we used the most compatible size/categories where possible in addition to making sure that we are using the most recently available data to make said comparisons. Given

the limitations we faced around the size of the sample size, we have used these comparisons with caution. Ultimately, these comparisons should be therefore seen as indicative of a trend rather than wholly descriptive.

Weighting

All themes were weighted equally across the feedback and scoring for this project. This is due to the limitation cited above about the sample size and the challenge it poses on heavy quantitative analysis. Further research should be undertaken to better understand and develop how different factors can be understood to impact quality of life more specifically.



Who we spoke to



In addition to feedback we'd collected at each site, we also asked respondents a series of questions to better understand who they are and how they might engage with their environment. These questions were optional, and therefore do not capture all the residents' demographic information, but they form a baseline to filter feedback and evaluate how effectively we have engaged with residents.

Total responses: Number of responses that we had received, including interviews.

Total reach: Total number of people who have visited the online survey and were contacted during face to face engagement visits.

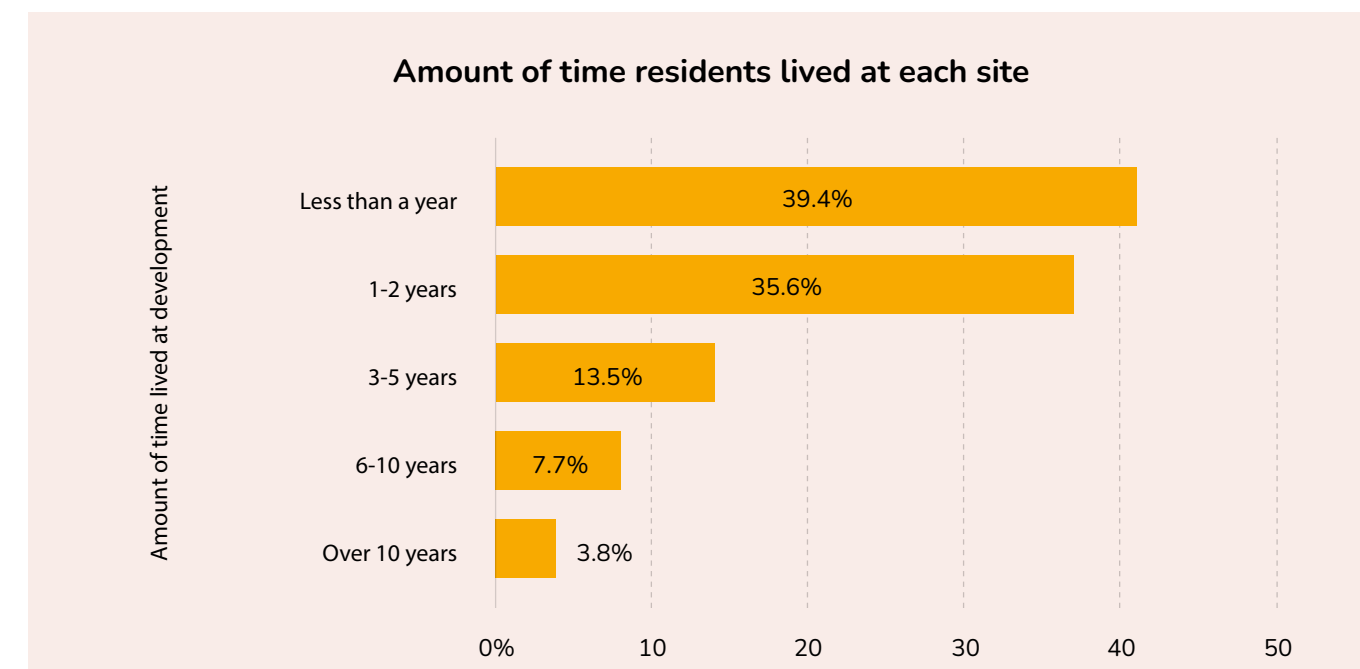
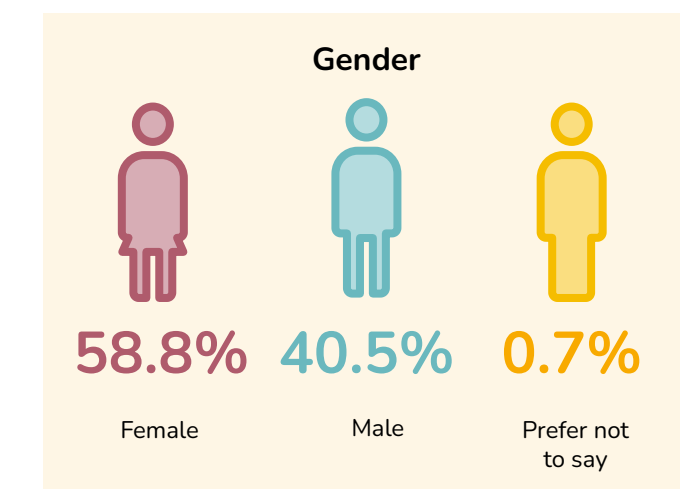
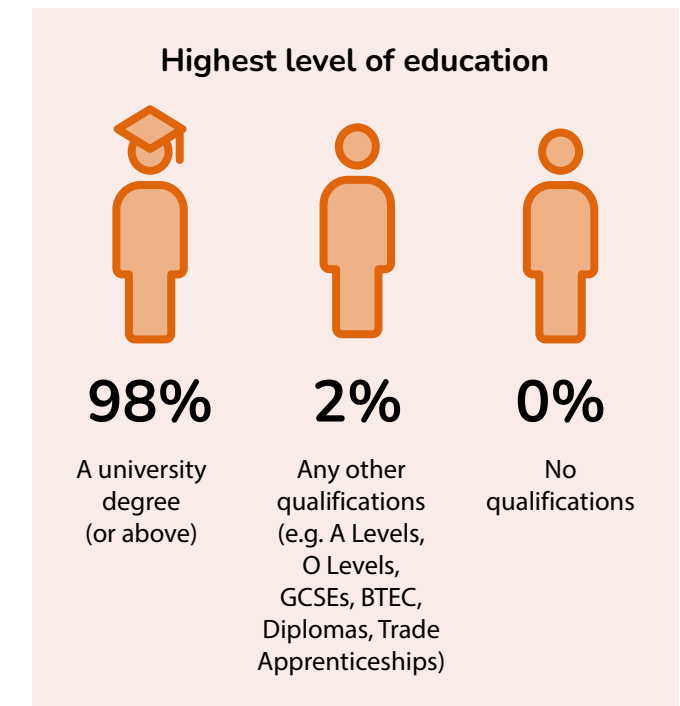
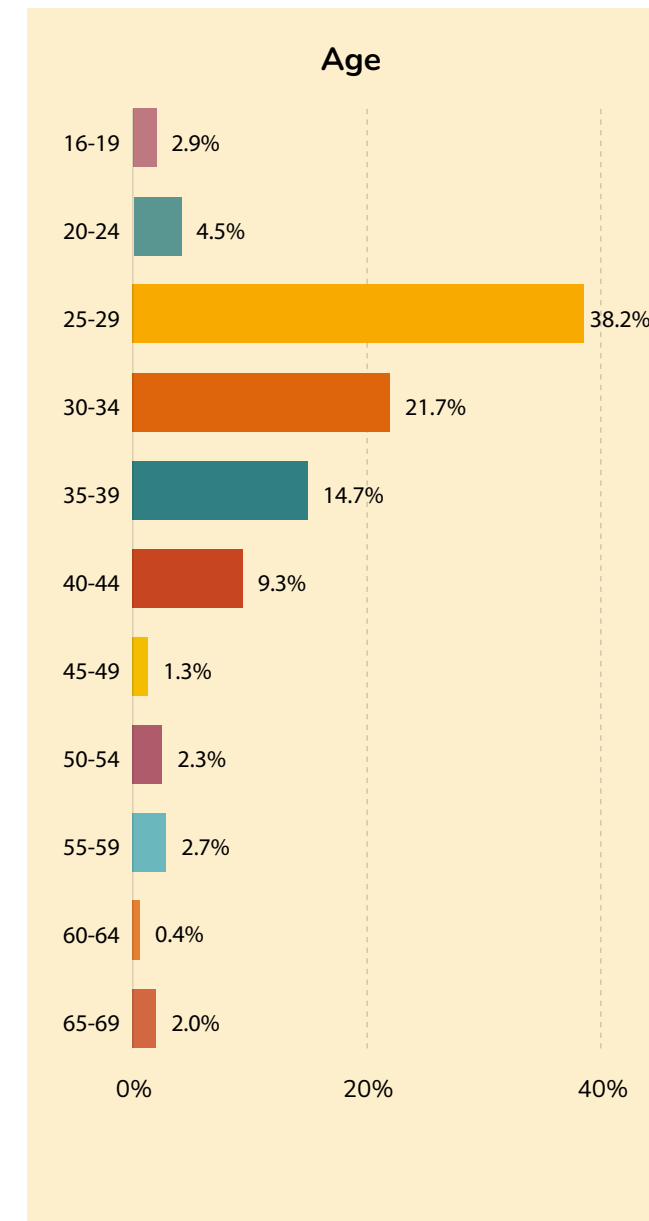
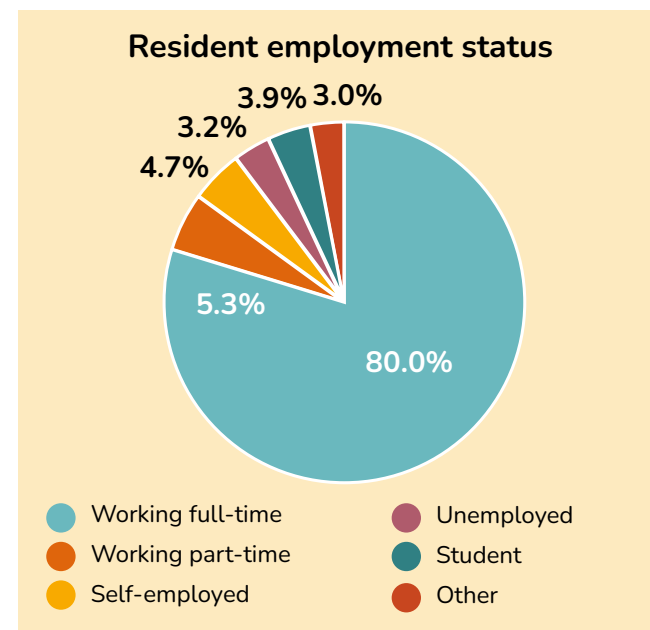
Greenford Quay	East Village	The Gessner
Total responses: 62 (resident: 31 / wider: 31)	Total responses: 190 (resident: 144 / wider: 46)	Total responses: 45 (resident: 21 / wider: 24)
Total reach 334	Total reach 701	Total reach 406

Demographic profile

A review of the demographic profile of BTR residents shows that the majority tend to be around 25-35 years old, in full time employment and have a high level of education with almost all respondents reporting that they have a university degree or more. Household income for these residents also trends higher than national averages. Reflecting on this profile, it is important to acknowledge

that it represents a particular sample of BTR residents that aren't representative of the wider PRS sector, therefore conclusions from this report are indicative and present a small snapshot of the findings, which will require further research to develop into a more comprehensive image overall.

Average household income for residents	
0.5%	£0
0.5%	£1 to £9,999
0.5%	£10,000 to £24,999
16.2%	£25,000 to £49,999
10.9%	£50,000 to £74,999
22.2%	£75,000 to £99,999
31.7%	£100,000 or more
17.6%	Prefer not to answer



What we heard



Here we summarise the findings of the resident and community surveys, in relation to the themes of the Quality of Life Framework. The findings below are an aggregate of the feedback we received from respondents at all three sites. The summaries in this section cover the answers given by residents, some of which include specific issues about each site and wider community members on specific views about the area and the impact of each BTR development. The primary aim is to reflect the feedback of residents and the wider community through this analysis, in addition to providing each BTR developer and the wider industry with insight into what can be done in future sites and developments. Each site also includes an evaluation of its social impact as set out earlier in the methodology section.

As part of the evaluation, the Quality of Life Foundation aimed to ensure the views and experiences of residents were not only heard but are also reflected back to the

residents and in this case additionally the view of wider communities. This section of the report outlines both the qualitative and quantitative findings from each site. Each site reflects a different form of BTR development, in terms of scale, location, amenities and interaction with its immediate and wider context. Therefore each site has its own strengths in providing for both residents and the wider community. These differences inform the types and scale of social impact that each site can have, and in this report we have focused on each site's individual qualities and contributions to social impact in their areas.



The social impact of built-to-rent on residents and the wider community

Overall, residents at the three sites surveyed reported levels of satisfaction and happiness higher than measured nationally, across England and across London. Broadly, this can be attributed to the perception that residents at all three sites shared around the positive impact that their homes have had on their health and wellbeing. This can also be seen in the positive feedback shared by BTR residents around their satisfaction with their accommodation, which is higher than those living in the wider private rental sector report nationally.



“a lovely place with a canal view and plenty of spots to sit and relax during free time. The staff does their best to make everyone happy and organises entertaining events and social gatherings for residents. Additionally, a lot of effort is put into day-to-day maintenance, which is much appreciated.”

Male, 35-39 years old

“Wellbeing has improved dramatically for me since I’ve moved here, the area is so nice and it makes me excited to get up and out of the house in the morning.”

Female, 25-29 years old

“The building itself provides a lot of great benefits to my health with the amenities as does my home - it’s mould free and cooking and eating well is easy! I also feel safe and secure.”

Female, 40-44 years old

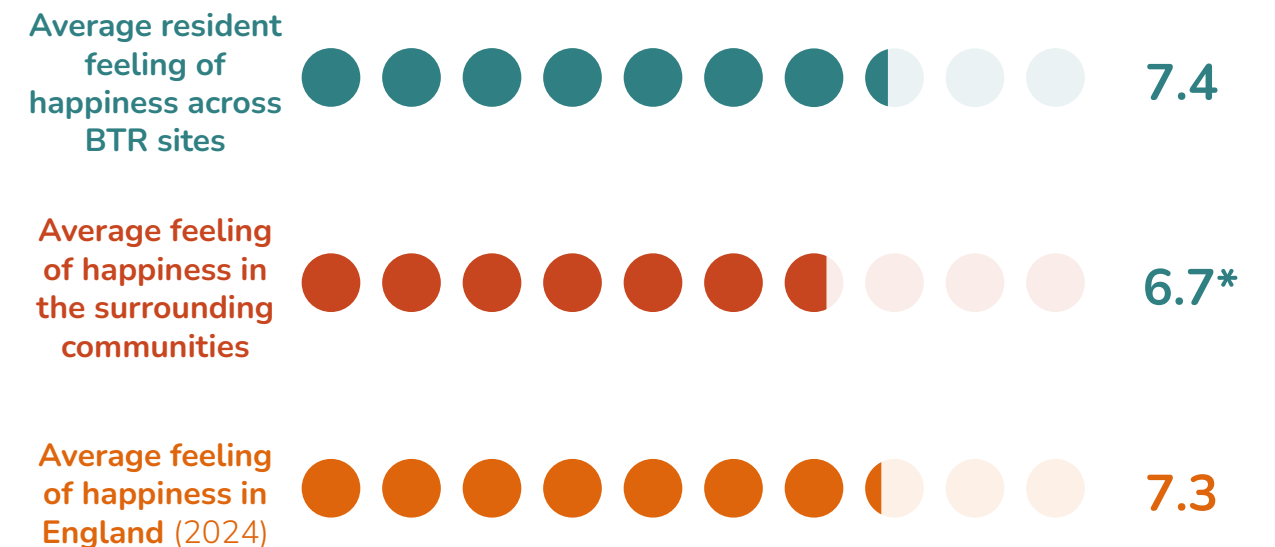
All three sites had different positives, challenges, and varying degrees of satisfaction across each theme, however there were some consistent likes and dislikes shared between them. The provision of high quality green space and its positive effect on health and wellbeing was recognised by 94.1% of residents. Equally the events and activities held in and around the sites were all positive additions for residents, with a desire for more. And the maintenance and general care for facilities was also highlighted as a positive aspect. On the other hand, wider amenities such as affordable cafes, shops, supermarkets and accessible community spaces were missing for some residents. Noise pollution, dominance of cars, and some forms of crimes and feelings of being unsafe were also prevalent, albeit in varying degrees across the three sites.

Key stats

Satisfaction with life



Happiness



0
(Not at all satisfied)

10
(Completely satisfied)

* Happiness and satisfaction scores for the wider community are based on the feedback we had collected during the survey, which is indicative. For more information, please refer to the research methodology section.

Sense of control

There were lower rates of perception of influence at all three sites, when compared to national figures. Although this is an issue across the UK, where rates are also low across the board, residents at the BTR developments we surveyed felt less able to influence decisions in their local area. Despite these numbers, the ability to influence decisions wasn't mentioned in qualitative responses. Looking more generally and across multiple themes, however, residents desire more variety of amenities and events at their sites, suggesting that further influence over programming is a priority in this sub-theme.

"I can influence decisions affecting my local area"

14.7%
Of residents felt able to influence decisions in their local area

vs

23%
Nationally (2023)

Across all three sites perceptions of safety after dark varied, but on average the BTR developments fall below the national average, with notably higher feelings of safety for male residents at 72.9% compared to just 58.7% for female residents. Among the factors affecting this were high levels of crime, low levels of lighting, and less frequented or surveilled routes leading to and around the developments. But it is important to note that these factors were not an issue at every site, highlighting the need for localised solutions through more specific consultation and evaluation.

When asked about affordability, residents across all three sites were mixed. Although half of respondents felt that their rent was affordable, almost 50% of respondents felt that it was not, which is slightly lower than the London average of 59%. However, this is not the case when compared to how residents felt about the affordability of their bills, where 73.1% of respondents felt comfortable with the costs of bills in their homes.

"It feels very safe and secure and a place a love to come back to"

Female, 40-44 years old

"The parks are lovely, it feels like a safe and clean place to take my child. It's great that there are so many play areas. I love visiting the independent businesses, particularly Signorelli the bakery and the ice cream cafe."

No demographic information

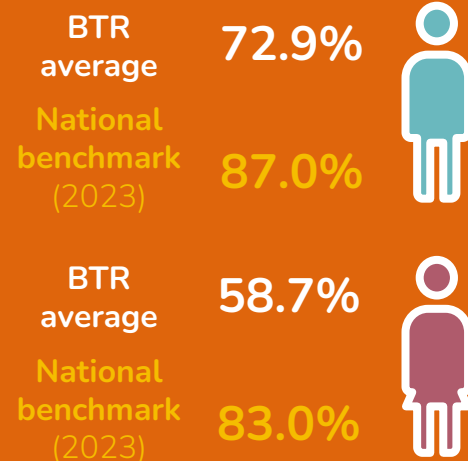
"Unfortunately, the area has become increasingly unsafe, with daily reports of phone snatchings and other violent crimes. Buildings are also becoming unsafe. Parcels left in the hallways are getting targeted and stolen."

Female, 25-29 years old

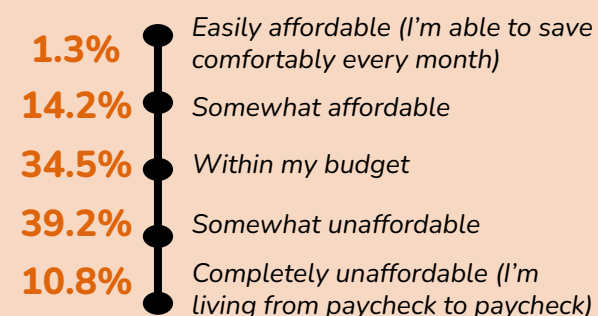
"We need more police presence, 24-hour security [...] There have been daily robberies and multiple stabbings, making the neighbourhood very unsafe."

Male, 55-59 years old

Percentage of residents who feel safe walking around their area at night



How affordable is your rent?



Wider community feedback

Feedback received from the wider communities at each of the sites we surveyed gave a slightly different picture. Looking at perceptions of safety, male residents of the areas surrounding BTR developments tend to feel safer walking around the developments than residents of the developments. This is not the case for female respondents, who scored their perceptions of safety similarly across both the wider community and the residents at these developments. This difference may suggest that perceptions around safety are relative, and might not be reflective of any higher rates of criminal or antisocial behaviour occurring at these sites. Further analysis and research may be needed to draw this conclusion more concretely, however.

"The greenery, ponds and general lovely outdoor space makes me feel good but the rise in crime around the area is making me feel more nervous and unable to enjoy the outdoor space."

Female, 30-34 years old

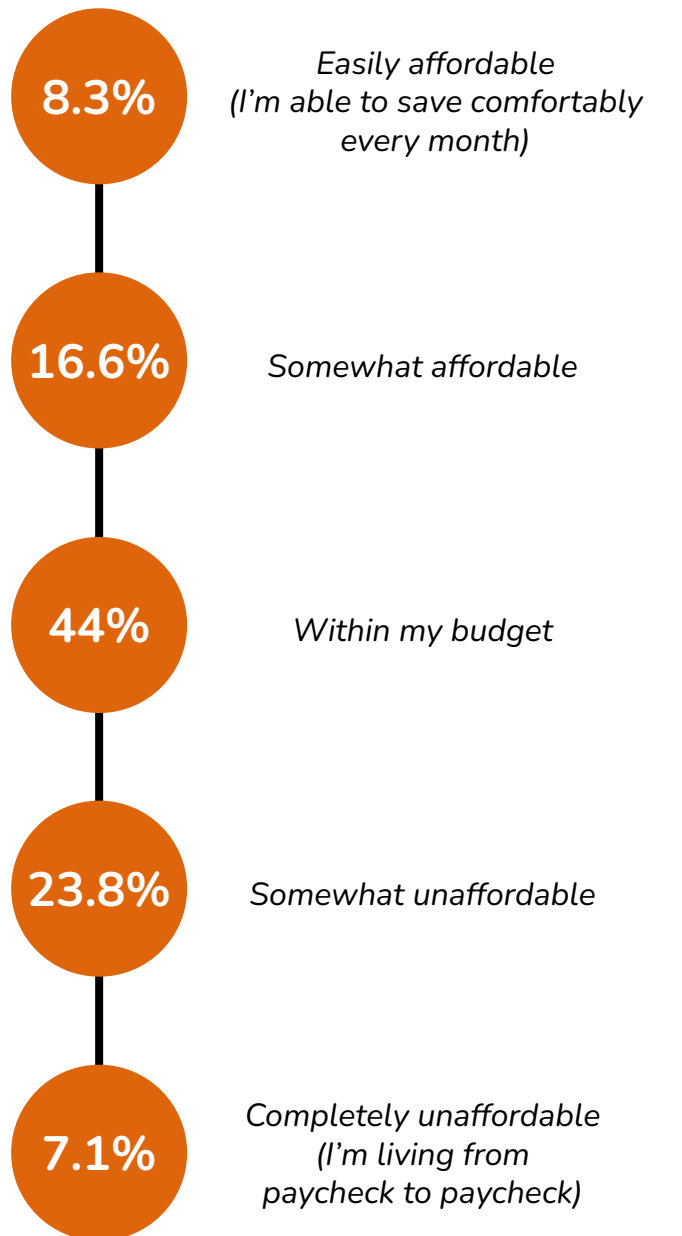
The wider community also scored the affordability of their rent and bills similarly to those of residents at BTR developments. Cost of affordability is given here by taking respondent's perceptions of the affordability of their bills and their rent to give an overall value. With this in mind, a closer look at both bills and rent shows that the wider community agreed that their homes were more affordable at a slightly higher rate than residents of the BTR developments.

61.6%
Of BTR residents felt the cost of living in their homes was affordable

vs

69.1%
Of the wider community residents felt the cost of living in their homes was affordable

Affordability of rent and bills for the wider community



Health Equity

Feedback from residents generated mixed results when it comes to how they perceived different kinds of pollution in their area. When it comes to air pollution, 60.1% of residents at these sites felt that the air was clean and free from pollution in their area. However, noise and light pollution were seen as an issue for respondents at BTR developments, where both were ranked relatively poorly, at only 38.5% and 46.4% of residents feeling their areas were free from both types of pollution respectively. Qualitative feedback from residents points to the proximity of these developments to major traffic routes and food and beverage offer spaces being the primary cause for concern, particularly when it comes to noise pollution. However, in some instances, concerns around anti-social behaviour had also contributed to concerns around levels of noise pollution too. It was noted in some cases that noise pollution was directly affecting residents' mental health.

“The building itself provides a lot of great benefits to my health with the amenities as does my home - it's mould free and cooking and eating well is easy! I also feel safe and secure.”

Female, 40-44 years old

“The increasing and ongoing noises from the streets around the building where I live. It's nearing an unbearable level.”

Male, 65-69 years old

“Wellbeing has improved dramatically for me since I've moved here, the area is so nice and it makes me excited to get up and out of the house in the morning.”

Female, 25-29 years old

Residents felt mixed about access to healthier food options, with just over half agreeing that they are able to make healthier choices locally. Across all three sites, there were shared calls for greater proximity to cheaper food options and larger local supermarkets, often feeling distanced from both. This was further stressed by residents when we asked them open-ended questions about their access to healthy food options, where responses also highlighted the absence of the supermarkets, and by extension the absence of cheaper food options, in their local area.

“The lack of small shops nearby leads to everyone with a car driving a lot and those without, overspending on big brands at Co-op/Starbucks.”

Male, 25-29 years old

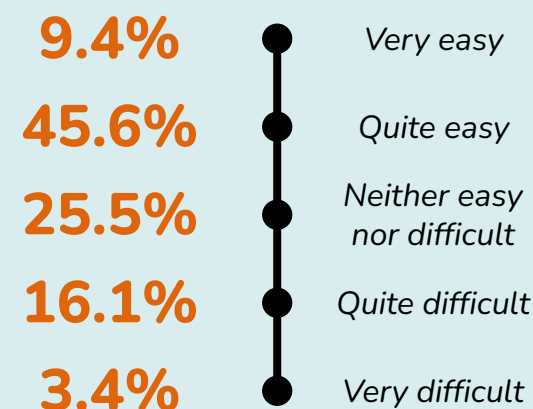
Air, noise, and light pollution

60.1%
of BTR residents felt that their area was clean and free from air pollution

38.5%
of BTR residents felt that their area was clean and free from noise pollution

46.4%
of BTR residents felt that their area was clean and free from light pollution

How easy it is for you to choose healthier food options and meals in your area?



Wider community feedback

The feedback from the wider community showed mixed responses when it comes to the impact that BTR developments have had on their ability to make healthier food choices.

Just over a third of respondents felt that this was the case, with a relatively even distribution of responses that either disagreed or felt neutral. This corresponds to the feedback we heard from BTR residents who pointed out a desire to have access to more affordable healthy food options.

When it comes to pollution, both BTR residents and the wider community felt similarly. With around half of responses scoring the environments positively, with the wider community coming in slightly lower at 42.4%. This slight difference could be attributed to the internal quality of the BTR developments, which have been rated highly by residents, that can help reduce the impact of pollution on BTR residents.

“Noise pollution is high, and the air is polluted”

No demographic information

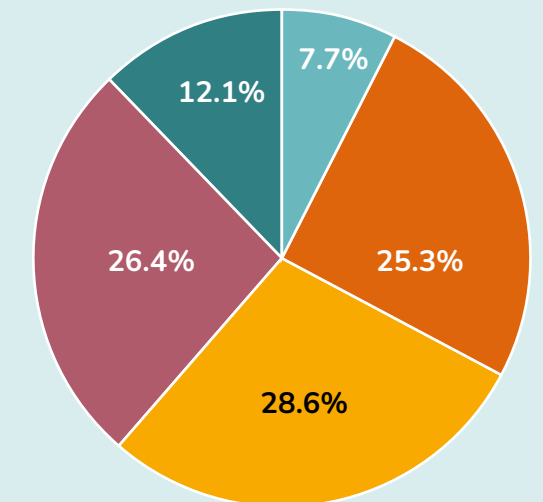
“It has offered a more peaceful and clean space within an overwhelming area and lifestyle, as well as providing a space for children to feel safe and play too.”

Female, 25-29 years old

“[the development] gave us the opportunity to have access to a location every Saturday which is so amazing! This allows me to run every Saturday”

No demographic information

“The development has made it easier for me to access healthier food options in my area”



“The environment in and around my area is clean and free from air, noise and light pollution”

48.3%
Of BTR residents agreed

vs

42.4%
Of the wider community residents agreed

Connection to nature

Across all three sites, residents highly rated the importance and benefits of having access to green spaces. When asked, residents consistently rated the green and natural spaces in their areas, often provided by their development, more highly than when compared nationally. These green spaces were rated positively for their accessibility, level of maintenance and for their overall positive direct impact on their health and wellbeing. This included the opportunities available to get physically active, both for adults but also for youth, and for general positive impact on mental health. The main feedback between the three sites regarding green spaces was a desire for more variety, such as dog parks, more blue space, and green spaces for gathering.

“Shoutout to the maintenance teams who keep our gardens and open spaces clean and safe to us.”

Female, 25-29 years old

“I like the wetlands area, as there’s plenty of different routes to walk around, and lovely green spaces, which means I often don’t need to travel far at all to get some fresh air, and they are a lovely view point to look at from the flat, which is a bonus!”

Female, 25-29 years old

“There’s lots of green spaces, which means its easy to get exercise and also fresh air”

Female, 25-29 years old

Across the board, residents were more concerned about the thermal performance of their homes. Although resident feedback reflected a positive feeling around the thermal performance of their homes during the colder winter months, this performance was tempered by comments that pointed out the overheating that can take place during the warmer summer months. Whilst 49.7% of residents generally agreed that their home is well prepared for warmer weather, 40.4% felt their homes were not at all, the relative split in feedback reflects a slightly more complicated picture.

“My local green and natural spaces are good places for my mental health and wellbeing”

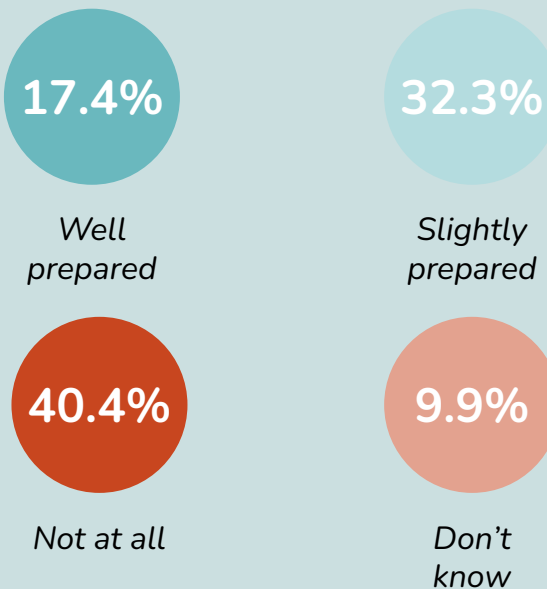
94.1% of BTR residents agreed **vs** **90%** nationally (2024)

78.9%

Of residents feel like their local green and natural spaces are thriving with diverse and healthy wildlife



How well prepared is your home for more hot summers?



Wider community feedback

Feedback from the wider community also strongly rated the green and natural spaces provided by the developments we surveyed, and noted that not only did the inclusion of these spaces create better feeling spaces, but improved mental health, play for kids, and made developments more pleasant and inviting to walk, wheel and cycle through. A majority of respondents agreed that these spaces are good places for mental health and wellbeing, at **86.2%**, and also agreed that these spaces are diverse and thriving with wildlife, at **65.2%**. Although each site varied in its own offer of green and blue spaces, the survey results show considerably that even sites having proximity to local green space such as rivers, wetlands, and lakes made the developments feel better integrated into the local area. The wider community echoed residents’ views across all sites that upkeep of green spaces was important, and raised the issue of safety, and that green spaces, although present, are sometimes unused due to fear of crime in some cases.

65.2%

of the wider community felt that the green and natural spaces at the BTR are thriving with diverse and healthy wildlife

“Green spaces do help mental and physical health. However, these areas feel a lot less safe in recent times and I’ve become reluctant to go out alone.”

No demographic information

“It is clean, new, vibrant, very green, well maintained and close to the park and the shopping centre. There are lots of playgrounds for children.”

Male, 30-34 years old

“The parks are lovely, it feels like a safe and clean place to take my child. It’s great that there are so many play areas.”

No demographic information

86.2%

of the wider community felt that the green and natural spaces at the BTR are good places for mental health and wellbeing



A sense of wonder

The additional amenities provided at the BTR developments were also well received by residents when surveyed. Each site's varying scale meant that there was large variation in the quantity of amenities provided both by the development directory, and what was found in the wider area. Overall, this was received well by residents, who were in agreement that they are able to easily visit a range of cultural and leisure amenities from their home. However, there was consistent feedback from residents regarding the types of culture, events, and amenities they liked, and wanted more of. Events for broader communities including markets and youth events were a particular draw for residents, which also helped strengthen the sense of community at these developments. As well as expressing the value of existing amenities and events, there were calls for a greater quantity and diversity, highlighting the importance of programming to BTR residents and their feeling of wonder and engagement.

Going hand-in-hand with the overwhelmingly positive feedback from residents highlighted in the Connection to Nature theme regarding access to green and natural spaces, residents also felt very strongly about their ability to be physically active and how this is not only important in terms of connecting to nature and health, but also engagement with culture and community. Feedback from the three sites showed that BTR residents score almost 10% higher than others nationally when it comes to the opportunity to be physically active, with green spaces, water activities, and running paths all contributing.

“a lovely place with a canal view and plenty of spots to sit and relax during free time. The staff does their best to make everyone happy and organises entertaining events and social gatherings for residents.”

Male, 35-39 years old

“It's more fun and active than other places. The fountains and canoeing are fun, the

64.1%

of residents can easily visit a range of cultural and leisure amenities from their home

53.4%

of residents feel that their neighbourhood has a unique character they are proud of

park is nice to walk to. There are cool activities”

Female, 16-19 years old

“The lack of a large Sainsbury's or Morrisons or Tesco does affect shopping, and healthier food options are limited. There is an M&S Food in West way retail park, but that's a medium size store.”

Male, 35-39 years old

“I feel like I have the opportunity to be physically active”

87.3%

Of BTR residents agreed

vs

78.5%

Nationally (2022)

Wider community feedback

Just over half of the respondents from the wider community felt that living near a BTR development has given them easier access to cultural and leisure amenities. This is particularly the case on the sites where additional amenities were provided, namely cafes and restaurants, that serviced both the residents and the wider community. Where play spaces were provided, residents reported very positively about the opportunities afforded to children and young people for play and gathering. Having a diversity of amenities, both large scale like supermarkets and small scale independent shops were almost universally suggested.

Community activities and events were also noted as enabling greater inclusion or engagement with developments, although there were some instances of wider community members feeling excluded from certain events. A few comments regarding events particularly noted the desire to have more community events that cater to young people and kids in the area.

“I love visiting the independent businesses, particularly Signorelli the bakery and the ice cream cafe. I like the architecture of the buildings and the good safe cycle paths which make it easy for me to travel there.”

No demographic information

“Greenford Quay events are spoken about locally as somewhere to go.”

Female, 45-49 years old

“It is clean, new, vibrant, very green, well maintained and close to the park and the shopping centre. There are lots of playgrounds for children.”

Male, 30-34 years old

“The space at the bottom has been empty for the whole time. Would be good if that was rented out to bring a bit more life to the area.”

Male, 30-34 years old

53.2%

Of wider community members felt that living near a BTR development has given them easier access to and leisure amenities from their home



Getting around with ease

Movement in and around the sites surveyed was scored highly by residents. When asked about walking, wheeling and cycling, residents at all three sites responded with overwhelmingly positive feedback, which is even more clear when compared to national feedback on the same matter. Although each site varied in size and therefore the quantity of footpaths, cycle paths, and parking, there was still consistent positivity about access within and around the sites.

Residents also felt strongly about the access to public transportation within their area. This is particularly the case as the sites were located within relative proximity to transportation hubs in London, with each site offering residents at least two options for bus, national rail and London Underground connections within a 15-minute walk. There were discrepancies between the sites, with some residents feeling unable to rely on buses or get to and from site with ease, highlighting the impact not just of developments themselves on mobility but the importance of location and existing transport infrastructure. Another, less clear-cut finding related to transport was the perceived dominance of cars. Despite 58.1% of residents feeling that cars do not dominate streets in their area, the qualitative data showed residents raising issues regarding car noise and pollution, which correlates with feedback we saw when we asked them about air and noise pollution.



“We’ve spent more time waiting for buses in this area than we have actually on buses from here. The difficulty getting anywhere from this area just makes us all the more depressed”

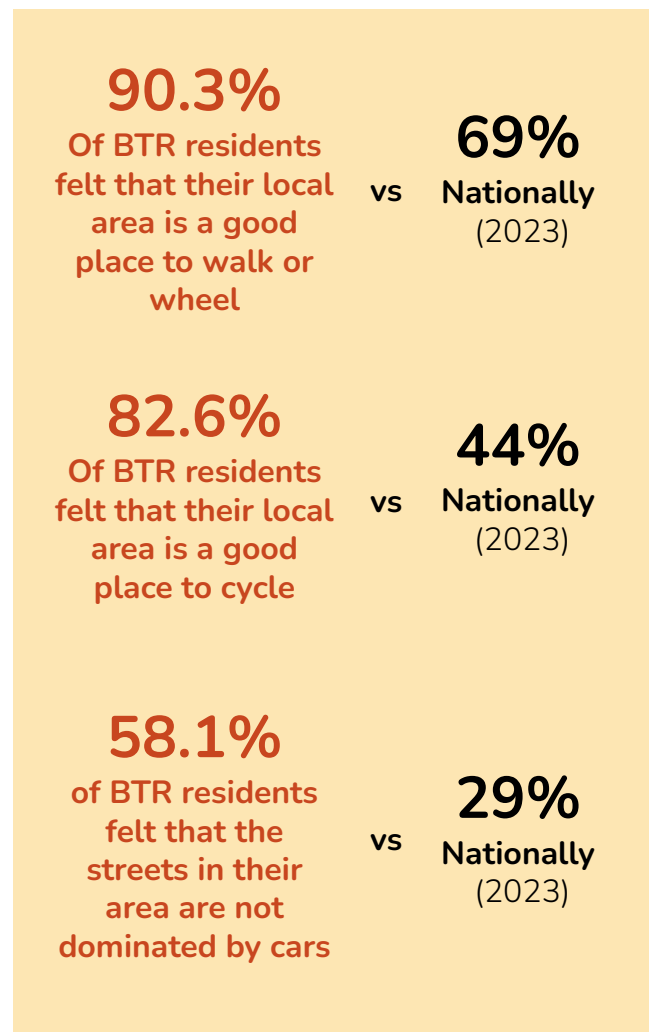
Male, 25-29 years old

“Getting around the area is extremely easy I can’t think of any improvements!”

Female, 20-24 years old

“Really like how close it is to public transport, with both the train station and underground station. This means I feel safer when I come back later in the evenings due to the closer proximity”

Female, 25-29 years old



Wider community feedback

In line with the feedback received from the BTR residents, feedback from the wider community also echoed the positive impact on the ability to move in and around their local area as a result of the development. Respondents from the wider community highlighted that they are able to walk, wheel and cycle more easily as a result of the developments. On the other hand, residents felt largely neutral about the impact that these developments have had on their ability to drive around their area, with 57.5% responding neutrally. The perception regarding dominance of cars also varied but linking back to health equity, most issues related to cars in the area were to do with air and noise pollution rather than wider issues of traffic congestion. With the variation in site scales and typologies, the ability of sites to offer wider infrastructure such as cycle paths was limited, with some residents feeling like cars take precedence in their local streetscape.



“More cycle paths would be good. More road crossings for pedestrians. The area is designed for cars.”

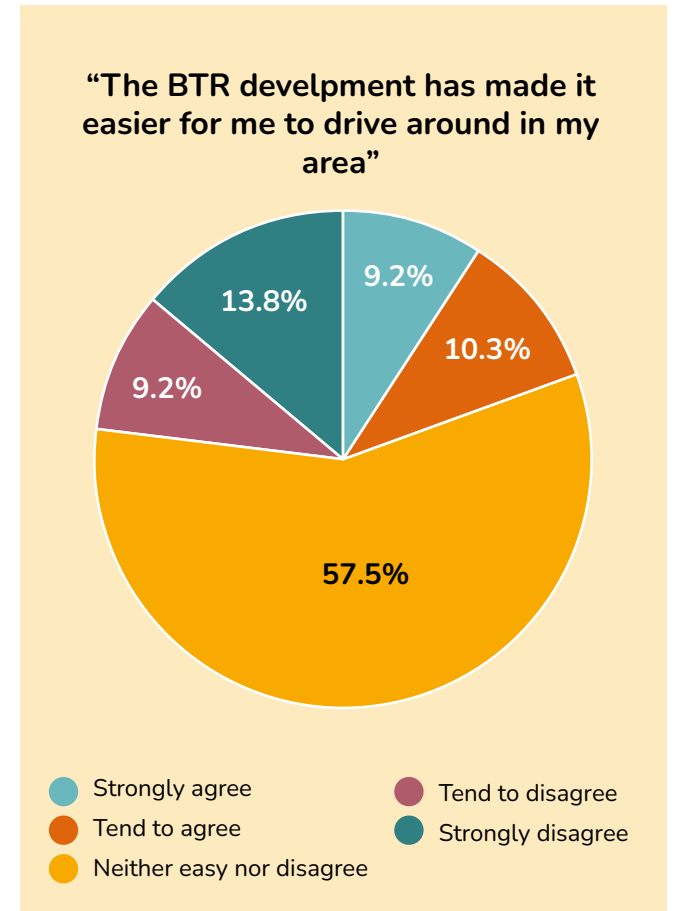
Female, 40-44 years old

“Great for pedestrians. Really like not having to walk next to a road for nearly all of my journey to the station”

Male, 40-44 years old

“I walk through the area more as it feels safe”

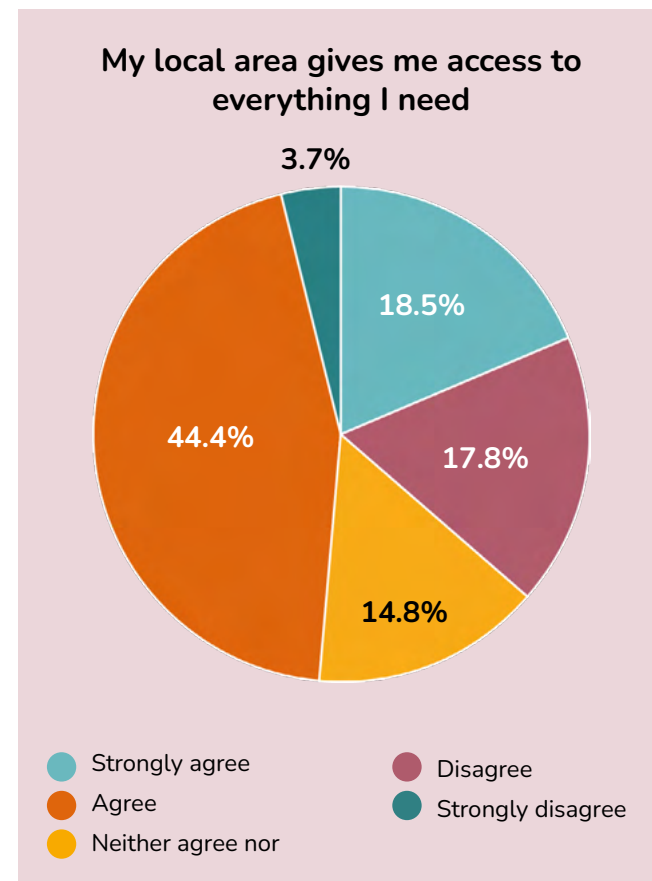
Female, 45-49 years old



Connected communities

Community cohesion was high across BTR sites, averaging slightly above the score for cohesion across London, and almost ten points higher than the national average in England. In most cases, residents attributed this cohesion to both the activities and events held throughout the years and the organising done by staff to ensure programming happens. Amenities provided by developments such as cafes, restaurants, gyms, in addition to other amenities nearby, were all attributed to creating a greater sense of community.

This is shown by the fact that nearly six in ten residents felt that the local area provides them with access to everything they need, reflecting the variety of amenities that are provided at each of the three sites. However, resident feedback from other parts of the survey explain why this score is not higher, as comments around the absence of supermarkets, community spaces, GP surgeries and places to get affordable groceries reflect this. In general, the provision of more community spaces was highly requested.



“A lovely place with a canal view and plenty of spots to sit and relax during free time. The staff does their best to make everyone happy and organises entertaining events and social gatherings for residents. Additionally, a lot of effort is put into day-to-day maintenance, which is much appreciated.”

Male, 35-39 years old

“As places such as cafes, bars and restaurants have opened, put on events and become more established, the community feeling of East Village has improved a lot. This goes a long way to help with mental health.”

No demographic information

“Love the community feel, and the fact that there’s really not many people that don’t live in the area and it’s mostly just residents, so it feels really safe compared to the rest of London! I also really enjoy having all the restaurants and bars two minutes from my doorstep, on top of being surrounded by green areas to enjoy.”

Female, 25-29 years old



Wider community feedback

Respondents from the wider community also felt positively about the sense of community at BTR developments, with a majority responding in agreement. A majority of respondents of the wider community said this was mostly due to the fact that they had routinely taken part in events or initiatives at BTR developments and that developments being open and accessible via amenities and events improved community feel and cohesion. A common response was the feeling of a neighbourhood they were a part of, rather than a separate set of housings for a particular group. This is a strong positive impact for the wider community, and has been something that has been raised by site leads when we were carrying out our research.

“Greenford Quay events are spoken about locally as somewhere to go.”

Female, 45-49 years old

“I feel it has created division and has missed opportunities to bring different parts of the community together.”

Female, 35-39 years old

On the opposite side, a smaller number of respondents in some instances from the wider community felt that BTR developments widened disparities between BTR residents and the local, wider community. This was felt both in a socio-economic sense, and through a lack of community feeling, especially in situations when events or amenities were felt to be exclusive or inaccessible to the wider public. It is worth noting that this feeling was not consistent across all sites and was often correlated with what BTR developments offer as social value through social and cultural infrastructure.

“I like the community area. I like how cleaned up it’s become, an area focused on its residents, as well as being an inviting environment to locals too. The events are often enjoyable, and the activities they host are inclusive and mindful.”

Female, 25-29 years old

“There are nearby parks and hubs, where children can go. [...] Shops nearby and shopping centre is useful. It’s quiet and there’s nature nearby. The new buildings can create a sense of there being a neighbourhood / of it being a centre for a community rather than just a thoroughway.”

Female, 40-44 years old

“More affordable housing for my daughter , more access to the facilities of the building for the local community to mix”

Female, 60-64 years old

67.7%

of the wider community felt that the BTR developments are a place where people from different backgrounds get on well together

57.8%

of the wider community had taken part in events and/or initiatives at BTR developments

Social impact at all three sites

Each of the three sites provided an array of facilities, programmes and services that catered to both the residents and the wider community. As such, measuring overall social impact across the sites requires a review of the individual sites to provide more particular context and detail about how and what kinds of improvements these developments were able to achieve.

East Village

At East Village, a considerable amount of resources and time have been invested by Get Living to ensure that residents and the wider community are positively affected by the development. This comes in the form of both the design of the development, where resident feedback and wider community feedback highlighted the permeability of the site, via walking, wheeling and cycling. This is also the case for the design, delivery and maintenance of the green and natural spaces in East Village, which were also equally highly rated by residents and the wider community for their positive impact on their health and wellbeing, and their biodiversity.

The E20 Bees Project is an example of the work that Get Living has carried out at the site in order to integrate the community, local business and biodiversity into their programming. The project has established bee hives on site, training four residents as beekeepers, in order to maintain and look after the bees regularly. The resulting honey produced in these hives is available onsite through a few independent retailers based in the development.

Investment into the resident and wider community by Get Living is more clear when looking at the provision of space, programming, support and direct funding at East Village. East Village has been the hub for creatives, cultural and environmental organisations. This is primarily done through the creative hub The Lab E20 and conversion of the former Sainsbury's store into a creative space for emerging design talent at East Village. Having launched in 2021, The Lab E20 has quickly become new flagship for experiential retail, cultural exhibition and creative workspace, with a focus on positive fashion and sustainable living. Designed by Christopher Raeburn, founder of RÆBURN, the 3,500 sq ft and double-heighted space in Stratford plays host to events and experiences with various cultural partners for residents and wider community, including the British Fashion Council, D-Lab, Fashion Open Studio, The Sustainable Angle, Loanhood and more. The Lab E20 has successfully incubated local creative-tech start-ups, supported the emergence of local design talent in partnership with the London College of

Fashion and works with local and global cultural partners for further collaboration between the fashion industry, the built environment and the creative industries.

At the end of 2022 Get Living began working with Hypha Studios, a charity matching creatives with empty spaces for free, to convert a former Sainsbury's store into a creative space for emerging design talent at East Village. Centred around the themes of design and community living, the space has become a showcase for a series of artists and exhibitions, cementing East Village as the gateway to East London's creative district and further supporting Get Living's strategy in creating an inclusive and sustainable urban neighbourhood. Over 2 years, Hypha Studios have presented 26 exhibitions with work from 435 artists, alongside supporting 124 events for local communities. East Village is also the home for local organisations such as D-Lab, a CIC that aims to improve access to the relevant skills to help tackle climate change through regenerative design. They provide mentoring, training, and upskilling alongside apprenticeships to help more young people get into the architectural profession.

Programming and activities at East Village also service not only the residents but the wider community. These programmes are funded directly by Get Living, and cover an array of clubs, groups and classes such as mental health clinics, fitness clubs and salsa classes. Funding for local communities that are responding to a localised need is also available, where residents and local neighbourhood teams are able to choose initiatives that they would like to support locally via Action Funder, a community engagement platform that connects business funding with local projects. In 2024, Get Living's Inspiring Community Funds granted £80,000 to organisations local to Stratford, Salford, Maidenhead and Lewisham, working with ActionFunder. Nine non-profit organisations were selected, supporting communities to develop new employment and creative skills and improve mental and physical wellbeing through greater access to nature.

Greenford Quay

As part of the delivery of Greenford Quay, Greystar has provided a number of new retail units, transforming the formerly industrial/office use into an area that has a number of positive benefits for the community. Although both residents and the wider community did point to a desire to have more affordable options, the delivery of the Starbucks and Co-op supermarket have provided residents with an opportunity to have easier access to places to meet friends and family, alongside the opportunity to easily and conveniently top-up on any groceries.

The public realm provision at Greenford Quay has had an especially significant effect on the community's perceptions around their health and wellbeing. Residents at Greenford Quay also report higher levels of satisfaction than national averages. This could be correlated with the additional amenities, green and blue spaces provided as part of the development.

Greenford Quay also provided a host of events that engaged the wider community, in addition to the first residents, since 2022. These events were varied, with some film screenings in the summer months and seasonal events such as Christmas dinners. These events were an essential part of ensuring residents and the wider community were eased into the development from an early stage and have made a big impact on improving the sense of community and cohesion between the incoming residents and the wider community.

The development has also increased the provision of bike parking, both long and short-stay, in the area, providing a total of 234 new spaces across the site and the surrounding area. Furthermore, Greenford Quay has provided almost 400 additional trees as part of the landscaping, with a variety of ages and sizes being considered to match the streetscape and the wider landscape. Lastly, by the time it is complete, Greenford Quay will deliver an estimated 2630 square metres of new play spaces, catering to children of all ages. These elements of Greenford Quay's design have positively contributed to residents and the wider community, as was shown in the analysis.

The Gessner

Residents at the Gessner have enjoyed a number of engaging and varied initiatives and events in the development, with a major focus on healthy lifestyles and overall wellbeing of residents. These programmes have been used by Way of Life as an opportunity to establish strong partnerships with local businesses, building long-lasting relationships with independent platforms, organisations and individuals. Between 2022 and 2023, Way of Life has collaborated with eight different partners to deliver seven different events and projects, ranging from DJs and catering, to illustrations and equipment hire.

However, these initiatives have largely been limited to the residents at The Gessner, which is reflected in the feedback from the wider community that we received. The immediate context poses a challenge in terms of provision of space for the wider community. Although the wider community felt positively about the impact that the green spaces provided by the development have on their mental health and wellbeing, the wider community did not feel it was clear about whether the coffee shop and The Shop were open to the wider community. However, as of the

time of writing of this report in October 2024, the coffee shop space has now obtained an operator and is open to the public.

The Gessner's partnership with the local community hub, Living Under One Sun, has proven to be positive. Living Under One Sun is a charity based in a hub in Down Lane Park, that aims to deliver front-line community-led services to the people of Tottenham. As part of this partnership, residents at The Gessner have been encouraged to donate £2 of their rent, which is then matched by Way of Life, to help fund the work that is being carried out by Living Under One Sun. This initiative, founded in 2022, has raised £7,440 so far.

Conclusion

In summary, all three sites have provided, and measured social impact differently. Some achieved this through directly funding community initiatives, incubating businesses and providing opportunities for apprenticeships. But across the board, responses from residents demonstrated that these developments had each provided a positive social impact through their delivery, mostly through the delivery of high quality, biodiverse and well-maintained natural and green spaces, alongside the provision of some amenities and programming. Careful consideration of site permeability and connectivity also serves as a benefit for the wider community, where walking, wheeling and cycling around sites that have high-quality green and natural spaces, is seen as an attractive and safe option to get around. These particular positive social impacts are inherent in the design of these developments, and so inclusion of these elements of quality of life are essential in the planning and design of successful future BTR developments.

Furthermore, actively including the needs of the wider community, alongside those of the residents, in the planning of the delivery of amenities, events and programming at BTR developments is a good indicator of success for the creation of neighbourhoods that are desirable, happy, healthy and ultimately good places to live.

Conclusions



On the whole, build-to-rent developments researched for this report have provided net positive outcomes for residents and the wider communities they are situated in. It is clear that BTR presents a unique and timely opportunity to improve the quality of life of residents and the wider community, whilst providing a solution to address the issue of the current housing shortage.

These positive impacts have been demonstrated through this report, as 82.2% of residents at the sites we spoke to said that their homes have positively impacted their health and wellbeing. This is down to a few key elements, including the quality of the outdoor green and natural spaces. These spaces have been consistently highlighted as a key asset by both residents and the wider community.

Furthermore, these spaces have also been well considered, and have in some instances provided amenities that cater to younger residents. These amenities are often overlooked in other types of housing delivery, and so the provision of these spaces into BTR developments also provides a key asset that improves the quality of life of younger residents and their families, by extension. Additionally 21.6% of our responses came from people over the age of 40, and 11.5% have lived at their sites for over 5 years.

This is also reflected in the feedback regarding satisfaction with accommodation, where 88.5% of residents felt that they are broadly satisfied with their homes. When compared against the national average of 81.8%, it is clear to see from these sites that BTR schemes are delivering homes and developments that are of a high quality and that are positively contributing to the sense of wellbeing and overall quality of life of residents.

The provision of programming, events and activities that are open to the public has also been a highly valued element of the surveyed BTR developments. These have not only improved community cohesion, but also provided opportunities for the wider community to take part in events and activities that would otherwise have not occurred.

Lastly, sites that had considered the connectivity of walking, wheeling and cycling traffic had been noted by the wider community as a net positive. Improved connections around and through BTR developments can help better integrate the residents and the wider community, but also make it easier for residents to get around their area with ease.

It is important to consider these positive benefits when planning the delivery of future BTR developments. However, we believe it is equally important to consider the areas where further improvement could be made.

Feedback from residents pointed out a need for more affordable options at the sites surveyed. This specifically relates to cafes and supermarkets, where current offers are seen as a positive, but they are also considered to be more expensive than options that are further away from the developments.

Internally, although residents pointed to a high level of satisfaction with accommodation, residents across all three sites pointed out that their homes were overheating in the summer. This appears to be a trade off, as residents felt that their homes' thermal performance during the colder winter months was great.

Lastly, comments around noise and perception of higher crime rates in and around BTR developments was a common theme. Concerns around noise were often drawing attention to the proximity of homes to other uses, such as food and beverage amenities, or down to traffic-related noise pollution.

The following section outlines recommendations that respond to the findings contained within this report. These recommendations aim to maximise the positive impacts that we have seen in our conversations with residents and the wider community at each site, as well as begin to address the areas for improvement that we believe would have the greatest impact.

Recommendations

Build-to-rent ("BTR") developments can offer significant social value by fostering strong, active communities. The findings from this research have informed the following recommendations for future schemes that respond to changing social, economic and environmental challenges that the UK faces over the next few decades. These recommendations are formed around the six themes within the Quality of Life Framework. There are on occasion overlapping themes covered by several of the recommendations.

1. Maintain the provision of high quality communal and public space, supported by hosted events.

All three developments include well-considered communal and public spaces that hosted events, organised sometimes by residents and other times by on-site management, that encourage important social interaction among new residents and existing local communities. These spaces and events led to a strong set of positive responses from residents and the wider community. The importance of building a sense of community on human health and wellbeing cannot be over-emphasised. It enhances individual confidence and safety and creates a healthy sense of unity and connection with other residents within the community.

This approach can also bring an enhanced living experience. The focus on community living means that residents often feel more connected and supported. Residents are more likely to stay in residential areas that boost their sense of community and social interaction, due to the satisfying feeling of being a part of something larger than themselves.

These all help to address themes around **connected communities** and a **sense of wonder** within these developments.



2. Continue to deliver high-quality green and blue infrastructure spaces as health assets in future schemes.

The three schemes are successful in developing new landscape-led green spaces with key connections and access to wider blue infrastructure. Residents and wider communities felt these areas to be highly valuable assets. Designed as an intrinsic part of the developments, they bring a multitude of social benefits to new and existing communities. To improve health and wellbeing these green spaces provide opportunities for physical activity, which can improve overall health, reducing cardiovascular morbidity and the risk of developing some illnesses. These natural spaces also offer a greener environment that can enhance mental health and reduce feelings of isolation and stress.

These areas also serve as communal spaces where people can gather, fostering social connections and a sense of community. This social interaction can be particularly beneficial in urban areas where social isolation and exclusion may occur. Creating areas that aim to encourage equity and inclusion can be another benefit of accessible greenspaces. Offering shared natural resources that everyone can enjoy, regardless of socioeconomic status, can help to create an equal chance for more disadvantaged communities.

Well-designed, maintained and managed greenspaces can improve urban safety by providing well-lit, open areas that are less prone to crime and disorder. They also enhance climate resilience by helping to mitigate the effects of extreme weather events such as extreme heat and rainfall. Greenspaces can be used for educational purposes, teaching children and adults about nature, sustainability, and the importance of environmental stewardship.

These all help to address themes around **connection to nature, health equity, and connected communities** within these developments.

3. Continue to provide high-quality play spaces for children and young people.

The communal spaces in each of the developments we looked at were recognised by residents as an important element of the schemes and ones they valued highly, especially for their capacity to provide spaces for children and young people to play and connect. This is one area where many standard housing schemes around the UK fail to provide and often neglect. We believe BTR is well-positioned to meet this challenge and offer clear advantages over other types of housing. Higher density BTR schemes often provide more public spaces and play amenities, which in turn encourage people to interact and build social networks. This can reduce feelings of isolation and foster a sense of community.

We know the importance of play for health; it improves the cognitive, physical, social, and emotional wellbeing of children and young people. Through play, children learn about the world and themselves. They also learn skills and confidence they need for study, work and relationships. Play also offers an ideal opportunity for parents to engage fully with their children and for intergenerational connections between all ages.

This approach helps to address themes around **health equity and connected communities** within these developments.



4. Improve building and public space design to create greater resilience to the increased impacts of climate change.

A high proportion of residents expressed concerns about overheating in some buildings. Climate change is predicted to have far reaching and unpredictable consequences. This poses several challenges when trying to reduce the greenhouse gas emissions associated with buildings (and in particular apartment block typologies used in multiple-family BTR housing) and for designing them so that they perform well over their whole lifetime. In the context of a changing climate, the long lifetime of buildings means that careful thought must be given to all aspects of environmental design to ensure lasting performance.

One consequence of rising temperatures, especially in summer, is that buildings are at risk of overheating. Over the past decade, improvements in the UK have resulted in better insulation, increased airtightness, and higher-performance double or triple-glazed windows. While these measures are essential for retaining warmth in winter and reducing energy consumption, they can also lead to excessive solar gains in summer, resulting in potentially dangerous levels of overheating.

The health impacts of this overheating can affect residents and in particular prolonged exposure to high indoor temperatures, especially when there is no night-time respite from heat. Increased heat can result in a range of adverse health effects, especially for the most vulnerable population groups. This includes babies, young children, and older people or people suffering from cardiovascular illness, diabetes, respiratory or mental health conditions.

Solutions involve identifying effective techniques to model and predict building performance in future climates, including methods to passively prevent overheating. This is crucial for the industry, as it not only addresses health and comfort concerns but also helps avoid the need for costly and energy-intensive cooling systems.

Tackling this issue helps to address themes around **health equity** within BTR developments.

5. Create opportunities for more cafes, shops and supermarkets, especially affordable options.

Something that came up in many responses was the lack of local amenities such as cafes, shops and supermarkets, particularly those with more affordable options. There have been past suggestions to allow planners to use Section 106 agreements to require developers to include affordable small shop units in major development projects. This rarely happens, but the opportunity exists for BTR developments to consider including more affordable rental options as part of new developments. This involves reduced or 'peppercorn rents' that can be let for lower prices and allows smaller independent shops to open, where they would otherwise be priced out. This could help to increase the variety of shops and services and help to address the affordability of key essentials. In a cost-of-living crisis this would be an attractive offer as part of future BTR schemes.

Affordable food clubs might be another option to consider. These facilities can range from social supermarkets and pantries, to food buses and larders, at the heart of communities where people live and work. Each setting offers nutritious food and other essentials for a fraction of their retail value. In doing so, they enable people on lower incomes to stretch their budgets further each week. BTR schemes could assist here by providing retail or storage spaces for these clubs to operate.

Another option is to consider local partnerships and collaboration with local businesses/organisations to provide services and opportunities for residents. This can include provision of retail and business spaces, job training programmes, local business discounts, and community events. The accessibility, location and convenience of BTR schemes must also be recognised. With more people living in a concentrated area, services such as shops, restaurants, and healthcare facilities are sometimes more accessible and convenient.

This approach helps BTR developments to address themes around **health equity, connected communities** and even **a sense of control** within these developments.

6. Find new ways to reduce neighbourhood noise and high volumes of traffic from surrounding areas.

This issue was raised by residents of the three schemes and from the wider communities living around the new developments. Urban areas where these schemes are located will tend to have a higher background level of noise. How this is addressed will become increasingly important as densities and population levels in urban areas increase.

Much like overheating, ensuring adequate and effective noise control for properties built in areas impacted by noise is imperative. A study published by the World Health Organisation, shows that noise from road traffic is the second most harmful environmental stressor in Europe behind air pollution¹. The damaging effects of living with stress from noise range from critical health issues such as cardiovascular disease, cognitive impairment and hearing impairment, to negative impacts on community wellbeing and mental health.

There are several considerations worth considering to reduce background neighbourhood noise. A shift to walking, wheeling, cycling and public transport access will have a significant impact on levels of vehicle noise, but we acknowledge that some of this will be beyond the control of the developer. Other modes of transport are now gaining popularity including electric bike hire, car clubs, micro-mobility options and consideration of providing mobility hubs (with a range of these options provided as part of future schemes).

Strategically configuring the perimeters of large open spaces with planting and landscape can contribute to acoustic insulation. The trees and buffer planting within new landscape proposals can help to dampen sound waves, reducing total noise levels. Building block layouts and boundary designs can also assist with noise mitigation. It is important to stress that this must be carried out as part of a cohesive noise assessment by suitably qualified professionals at the earliest stages of site design.

This approach helps to address themes around **health equity and connected communities**. The theme of **getting around with ease** also becomes more attractive with lower noise levels.

7. Create opportunities for improved walkability and cycling infrastructure in areas surrounding developments.

The provision of choice in transport modes is key and it is obvious that these schemes have contributed to an increased sense of agency and freedom for residents and the wider communities. This is an area that also links in to many social and environmental benefits and increases key social value outcomes for these BTR projects. Making these choices available, accessible and easy to use helps to overcome key barriers often experienced in other areas.

Allowing residents to choose walking, wheeling and cycling rather than using a car helps to reduce local air pollution. The reduction of motor traffic also lowers congestion and reduces the noise that comes from engines and car movements. By making a strong commitment to improving walking, wheeling and cycling options, other residents are likely to notice the benefits and be encouraged to consider these options for themselves.

The provision of easy and accessible choices for walking, wheeling and cycling benefit health in several ways. Walking, wheeling and cycling can improve metabolic health and a reduced risk of premature mortality. It can reduce the risk factors for several diseases, including cardiovascular disease, respiratory disease, some cancers, and type II diabetes. In addition, walking, wheeling and cycling have positive effects on mental health and general wellbeing. The mental health and neurological benefits include reduced risk of dementia, improved sleep quality, and a greater sense of wellbeing.

This approach helps to address themes around **health equity and connected communities** and **getting around with ease**.

8. Address perceptions of higher crime rates in and around developments.

Perceptions of crime are always difficult to address without understanding more deeply what these relate to, and crime rate is also a national issue. Different people will have different perceptions of how significant the fear is and what types of crime or perceived crime worry them most. It is not an issue to ignore, as if left unaddressed it can lead to residents' unease and dissatisfaction with the place in which they live.

The recommendation here is to work on better understanding of the problem in more depth with more detailed analysis and engagement with residents and the wider community. This will help operators to understand if these issues can be resolved with changes to design and management of the scheme or whether they require wider action alongside local crime reduction partners. Taking these steps will give a feeling of control and a recognition that concerns are being taken seriously.

Many areas have local crime reduction teams operating between the local authority and police. Making those connections with local community safety teams will also help them to understand concerns and make recommendations where they can assist. One lesson learned for other areas is to keep residents informed of progress through events, social media and site wide information boards. BTR developments often have an advantage with the use of enhanced security measures, such as 24/7 concierge services and advanced security systems, which help to contribute to a perception of a safer living environment.

It is well-established that crime has substantial direct health and wellbeing impacts on individual victims. Indirect area-level links between crime and health, however, are less well established. Defined solutions to this are less well recognised due to the variations in perception and the types of crime residents are worried about. However, action should be taken to give communities some feeling of control. Providing avenues to input into possible solutions can have beneficial effects in communicating that the concerns and fears of the residents and the wider community are not being ignored.

This approach helps to address themes around **a sense of control** and **connected communities**. Improvements in safety and security of places also help with the theme of **getting around with ease**.

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1 New evidence from WHO on health effects of traffic-related noise in Europe, World Health Organisation

Glossary of terms



What is quality of life?

We define quality of life as a person's physical, social and psychological wellbeing. By placing more emphasis on health and wellbeing, we can create better places for people to live in. For this project, we have used the Quality of Life Framework, with its six key themes, to paint a full picture of the life and experiences of residents across: Control, Health, Nature, Wonder, Movement and Community.

What is social value?

When we talk about social value and the built environment, we are referring to the UK Green Building Council's definition "... social value is created when buildings, places and infrastructure support environmental, economic and social well being, and in doing so improve the quality of life of people."

What is qualitative data?

This is data that is more descriptive in nature, and that can also take a more narrative form. Qualitative data is typically made up of non-numerical feedback that is usually collected in engagement programmes via interviews, open-ended questions and focus groups. Examples of this include surveys that ask open-ended questions about how respondents feel or perceive things in their local area.

What is quantitative data?

This is data that is made up of discrete and continuous points and categories, where data has unique values that can be expressed and analysed directly as numbers. For example, quantitative data could include the number of people living in a home or the number of times someone catches the bus per week.

What is representative data?

This is data that reflects the true structure and characteristics of a larger population, without having to collect the data from the larger group. In this project, the notion of representative data was more specifically aimed at ensuring that feedback from minority groups was captured and analysed in a proportional way.

Appendices



Appendix A: Measuring social impact

This report demonstrates an outline for a methodology that can be used to measure the social impact of current and forthcoming BTR developments. Doing so can help demonstrate the benefits of using the BTR sector as a bigger piece of the puzzle to address the challenge of affordable housing nationally.

1. Understand the context

Developing a robust understanding of the site, be it the pre-development context or the current picture at a fully delivered scheme, it is essential to get a sense of the factors that are affecting the quality of life for the community around BTR sites, and the residents that may already be living at more completed developments. As such, the following are useful first steps to take to help flesh out the elements that influence quality of life:

- Use the Quality of Life Framework as a checklist for these issues to get a holistic picture
- Carry out desk research where data allows to understand the context
- Carry out audits with the community to understand what amenities might best address these challenges/improve quality of life

2. Track the impact

Once a site has been mapped, the developer would ideally engage with residents and the wider community to capture the lived experiences as an essential part of the social impact measurement methodology. This would require that the developers:

- Undertake a baseline measurement of quality of life at the site to track how the site performs over time
 - Ideally carry out these evaluation every 1-2 years depending on capacity and resource availability
- Carry out regular surveys and evaluations with residents and the wider community, ideally led through the on-site teams, at regular intervals
 - Feedback to residents and the wider community on these evaluations in order to ensure continuous engagement and uptake as respondents see their feedback being heard.
- Use the same questions over time to ensure parity and consistency of data over time

3. Review and evaluate

Lastly, as part of the ongoing measurement, the evaluation of the methodology will be essential in ensuring that the

resources gathered over time are reliable and valid. These reviews will be best carried out externally, but can also be carried out internally if time and resources allow. A review should include review of:

- Stakeholder lists and the channels through which they are contacted to ensure that these evaluations are capturing feedback from all stakeholders consistently and that they account for any demographic changes over time
- Benchmarks where necessary to ensure that any comparisons are able to reflect wider changes that might occur as a result of bigger environmental, social and economic factors

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