

RIGHTSIZING: Reframing the housing offer for older people



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Foreword

We often make assumptions about where people want to live in their later life. Whether it's downsizing to a more manageable property or moving into a retirement community, many of us paint a mental picture of 'housing for older people' without thinking.

The reality, though, is very different: the vast majority of older people live in ordinary, mainstream homes, and they have absolutely no intention of changing that.

As we age we have just the same desires to improve our quality of life as anyone else. Yet the people who are most able to make positive proactive choices when it comes to moving home tend to be those that are younger, healthier, and wealthier.

This leaves a large proportion of older people who for many reasons aren't able to make these proactive life choices, and who only move home when they reach crisis point – for example because of worsening health, eviction, or divorce.

In Greater Manchester we recognise the challenge that younger people face in finding good quality housing, but it is vital that our housing strategies recognise not just the inequalities between generations but the inequalities within generations.

We need to make sure that, as we grow older, we are not denied the same opportunities and life choices as others simply because of income, tenure, or where we live.

In the next 25 years, the proportion of households where the oldest person is aged 85 or over will grow faster than any other age group. And if we do not ensure diverse, accessible, age-friendly homes are available across the city region, increasing numbers of us will find ourselves trapped in homes that are not appropriate for us as we age.

In Greater Manchester, 85% of the housing that will exist by 2035 has already been built, much of which does not meet the changing needs or aspirations of our older residents. We need to develop innovative new approaches to ensure that new housing is both attractive and within reach of those who wish to move, and that programmes are in place to support those who want to remain in their current homes.

If we deliver a new wave of housing which is adaptable and accessible, within our existing communities and neighbourhoods, we can enable people of all ages and abilities to live the life they want to – and in the homes and places that make them happy.

Our partnership with Manchester School of Architecture, Centre for Ageing Better, and the work of the Ageing Hub within our Combined Authority, has helped position Greater Manchester as world-leaders when it comes to research on ageing, and I urge policymakers across the UK, to capitalise on this expertise we have available.

Andy Burnham
Mayor of Greater Manchester

1. Moving beyond downsizing

The need to explore diverse housing options for our ageing population requires us to move beyond limited discussions about ‘downsizing’, and towards a model of ‘rightsizing’ in which improving older people’s quality of life is the critical focus.

As recognised in the UK government’s ‘Industrial Strategy Grand Challenge on Ageing’, population ageing is one of the defining societal changes in the 21st century and it has important and widespread implications for housing and planning.

This report takes a broad view of the term ‘older’, taking it to mean 50 years of age and over. This decision was taken to enable the research to capture pro-active moving in relation to early older age life changes such as retirement; and to align with the context of much age-restricted housing provision in the UK. A final reason is to ensure that the most deprived communities of older people with the lowest life expectancy are also included in the analysis.

Planning responses to an ageing population in the UK have tended to emphasise the provision of purpose-built specialist housing and age-restricted communities (such as retirement, sheltered and extra-care housing). While there is a clear demand for such facilities, these options only serve a small percentage of the older population. Around 95% of older people (50+) live in mixed communities and general needs housing and are the least likely to move home – only 3.4% of all older people move each year.

With almost a third of UK residences now occupied exclusively by people aged 55 and over, (representing 7.3m out of 22m total households) a common but controversial

response has been to highlight the potential social benefits of ‘downsizing’ for an ageing population ‘under-occupying’ their properties (*Pannell, Aldridge, & Kenway, 2012, p. 12*).

The envisioned benefits of downsizing include firstly, the release of larger properties into the housing market thereby increasing supply in the midst of the current crisis. Secondly it is assumed that these moves can and will be made into properties which are designed to be accessible and adaptable – enabling ‘ageing in place’ without further increasing demand for specialist housing support.

With so few people moving and only around 7% of existing UK stock currently recognised as meeting even minimum accessibility standards the implication is that few older people are able to identify available options in the market (across all tenures) that they feel will improve their quality of life, and that are accessible to them. While ‘downsizing’ as a concept serves to alert us to some key challenges it draws attention away from a more nuanced response to the problem.

A key finding of the research presented here is that in fact, **the majority of older people who are moving across all tenures are not ‘downsizing’** at all and the majority of those that do move only reduce the size of their property by one room.

Apart from not accurately describing the actual situation of moving as it currently stands, the concept of downsizing has limited use in research aiming to develop planning responses involving older people because it has a number of pejorative implications including three key ones set out in bold below:

‘Older people’s health concerns are the only reason they might want to move’

- ▶ This perpetuates the incorrect assumption that moving for older people is a choice between ‘home’ and ‘a home’ (*Pannell et al., 2012, p. 57; Sutherland, 2010, p. 2*).

‘Older people are blocking young families from accessing housing’

- ▶ This distracts from the lack of suitable alternatives; the financial inequality within the older population; and their agency in deciding which environment best serves their needs (*Park & Ziegler, 2016; Watts, 2016a; Watts, 2016b*).

‘Older people’s moves are made out of necessity, not to improve their social status’

- ▶ This implication underplays the importance of improving or maintaining social status for older movers (*Heywood, Oldman, & Means, 2002, p. 85*).

This study aims to support a better understanding of which older people currently move home, why they move, and what kinds of move they are making, but its main ambition is to positively reframe thinking about the housing offer for older people through a proposed definition of ‘rightsizing’. **Our working definition of rightsizing is that it is an older person’s active, positive choice to move home as a means of improving their quality of life.**

The report uses this concept of rightsizing to reframe the potential gaps in housing provision for different groups of older people; It makes recommendations about ways in which these gaps might be reduced or closed; and outlines some ways in which these gaps in provision could both be understood and responded to by regional and local housing strategies.

While much more research in this area is clearly required, we hope that this report will support proactive and nuanced discussions about the diversity of requirement for older people’s housing.

2. Executive summary

1. Very few older people move home in later life, and most of these moves are not into specialist housing.

- ▶ Just 3.4% of older people (50+) move home every year in the UK. This is half as many moves compared to the rest of the population.
 - ▶ This is despite just 7% of properties having the most basic accessible features that might enable an older person to age in place.
 - ▶ Only a small minority of moves made by older people are into specialist accommodation, even in the 70+ age cohort.
-

2. Most older movers are not ‘downsizing’ and many moves are neither desired nor planned.

- ▶ Under half of the moves made by older people result in having fewer habitable rooms.
 - ▶ Many older people make moves that maintain or improve their social status – relocating to homes of similar size and value.
 - ▶ 41.1% of older people had no desire to move home when asked one year prior to relocating.
 - ▶ 41.3% of older people didn’t expect to move home in the near future.
-

3. Our research shows that older movers can be divided into two distinct groups – those driven by availability of better options and those driven by accessibility of better options.

Availability driven

- ▶ Based mostly on aspiration, dependent on the (limited) availability of options that allow them to meet these aspirations.
- ▶ Lack of local options lead them to move further in order to make lateral or positive status moves.

Accessibility driven

- ▶ Based mostly on problems, dependent on the (limited) accessibility of options that allow them to solve these issues.
- ▶ More likely to have experienced lifestyle change, and need support to make better options accessible to them.

4. For those who do choose to move, their decisions involved assessing the potential to improve their quality of life.

- ▶ Assessing whether an option is better than a current home is not limited to a ‘bricks and mortar’ comparison between two properties – decisions are based on issues including: emotional attachment/proximity to social networks/financial benefits and costs of moving/available support for moving.
- ▶ Complex assessments are made by individual movers weighing pragmatic, felt and imagined factors when considering their available and accessible options.
- ▶ Decisions tend to be based on how they think their environment and personal circumstances might change rather than on the person’s current personal circumstances and current home.

5. We propose adopting the concept of ‘rightsizing’ as the basis of new strategies and policies in relation to older people’s housing.

- ▶ Rightsizing is defined here as an older person’s active, positive choice to move home as a way of improving their quality of life.
- ▶ The ability to rightsize is dependent on both the availability and accessibility of housing options that people feel would improve their quality of life.

6. The majority of older people appear to be in a ‘rightsizing gap’, where housing options supporting a better quality of life are neither available nor accessible to them.

- ▶ Wealthier groups are shown to be able to move further to satisfy their housing needs.
- ▶ Social tenants are the most likely to be able to access specialist accommodation when moving.
- ▶ As much as 60% of the population of older people have little opportunity to move from their current home, regardless of its suitability. Park and Zeigler (2016) suggest that only the wealthiest 10% and least wealthy 30% of older people (supported by the social housing sector) have adequate rightsizing options.

7. We recommend that policymakers and practitioners pursue strategies to close the ‘rightsizing’ gap working directly with older people.

3. Recommending rightsizing

Rightsizing reframes approaches to housing options for older people in terms of the availability and accessibility of desirable options. We suggest the following as some key features of a coordinated response.

1. Ensure housing strategies respond to the availability and accessibility of rightsizing locally.

- ▶ Frame strategic housing policies in terms of rightsizing and ensure that they are informed by assessments of local demand.
- ▶ Produce and share insight into the diverse needs and aspirations of older people and the homes/neighbourhoods they want to live in, through collaborative co-research.

2. Develop and share rightsizing insights with older residents, housing providers and developers.

- ▶ Develop and support information and advice platforms for older people throughout the life-course, for example for people in their 60-70s for whom proactive moves might provide long-term benefits.
- ▶ Take a participatory approach to discover the rightsizing gap within neighbourhoods and how both accessibility and availability can be closed.

3. Enable physical and financial accessibility for new and existing housing options.

- ▶ Adoption of Part M Category 2 housing standards as a minimum for all new housing development.
- ▶ Enable adaptations of existing stock across tenures.
- ▶ Support moving into appropriate housing across tenures
- ▶ Explore how existing housing can be adapted, extended and reconfigured to increase rightsizing potential.

4. Develop cooperative neighbourhood and housing models across tenures.

- ▶ Engage communities directly to explore needs and co-create improved neighbourhoods.
- ▶ Promote the creation of new housing in response to current and future demand that increases availability and/or accessibility of housing options.
- ▶ Explore how novel forms of housing, such as self-build, almshouses, cohousing or co-living, can reduce the rightsizing gap.
- ▶ Support specialist housing options to integrate their offer into the wider community.
- ▶ Support involvement of older people in housing management.
- ▶ Support the development of Age-Friendly Neighbourhoods.

4. Understanding rightsizing

This section reviews existing academic literature to establish which older people move home, why they do so and how rightsizing can be used to understand this process.

Which older people move home?

A key finding from previous literature is that older people are the least likely demographic to move home. Just 3.4% of older people (50+) move each year, with younger people (under 50) over twice as likely to move than their older counterparts (*Evandrou, Falkingham, & Green, 2010, p. 82; Pannell et al., 2012, p. 27*). Whilst this report focuses on available research into the moves that older people make, it is important to reiterate that this is only a small minority.

The current focus on providing extra care housing and age-restricted retirement living addresses specific needs, but there is much less mainstream residential provision aimed at older people (*Pannell et al., 2012, p. 7*). Government initiatives like ‘help-to-buy’ and stamp duty relief have encouraged housing providers to focus on the needs of first-time buyers, often at the expense of typologies and developments that might be more appropriate for older people (*Park & Ziegler, 2016, p. 10*). Enabling more older people to move home in later life requires a more nuanced exploration of the options that older people feel will improve their quality of life.

For those who do move, research indicates that their decisions are determined by the relationship between two main elements – their (present and future) personal circumstance and their (current and potential) environment

(*Peace, Holland, & Kellaheer, 2011; Smetcoren et al., 2017*). Previous studies of the individual factors which influence the decisions of older people to move or ‘age in place’ outline a large number of interrelated causal factors showing that the picture is complex. Our research finds that individual factors are not good predictors of moving in later life. Some key personal and environmental factors for consideration are outlined below and overleaf:

Personal factors

A number of studies have identified how age, health, living arrangement, income and tenure affect the likeliness of an older person moving home. This research has demonstrated that:

- ▶ Moving is more likely at both the younger (50-60) and older (80+) ends of the age spectrum. The group least likely to move are the 70-74 age group, with just 2.4% of individuals in this age group moving home per year (*Evandrou et al., 2010, p. 82*).
- ▶ Older people who report having very poor health are more likely to move, with a significant increase in moves made by younger (50-69) men and older (80+) women in poor health (*Evandrou et al., 2010, p. 88*).
- ▶ In a study of older movers in Belgium, health problems are the third most common factor that influences older people’s choice to move (*Smetcoren et al., 2017, p. 98*).

- ▶ Transitions between living arrangements can lead to an increased likelihood of moving. 15% of newly divorced individuals move home and 21.1% of newly partnered people move. Only 5.3% of newly widowed individuals move home (Evandrou et al., 2010, p. 83–90).
- ▶ For those who never married, the number of movers is relatively low at 3.1% per year, suggesting that it is the unplanned transition to living alone that increases the likelihood of moving (Evandrou et al., 2010, p. 83–90).
- ▶ Homeowners with higher levels of mortgage debt have a higher likelihood of moving in later life and are more likely to move to cheaper homes or multi-family homes (Bian, 2016).
- ▶ Over 14% of private renters in the 50-69 age group move every year. This makes them over three times more likely to move than those who own or socially rent their homes. (Evandrou et al., 2010, p. 87).
- ▶ Only 39% of older homeowners who moved to a new-build home between 2010 and 2016 downsized to a home with fewer bedrooms, a third moved to a home with the same number and 28% upsized to a home with additional bedrooms (NHBCF, 2017).

Environmental factors

The decisions people make are not based just on the home they live in, but also the neighbourhood and community they inhabit. Findings from previous studies suggest the following:

- ▶ Housing factors that are desirable to older people are similar to other age groups, such as a good location, space for guests to stay, access to high-quality outdoor space and cheap energy costs (Pannell et al., 2012, p. 32).
- ▶ The most common reason for moving in a Belgian study was a desire to move to a more attractive environment, predominantly cited by older people with high income, homeowners and people in good health (Smetcoren et al., 2017).

- ▶ Another common environmental factor was a desire for better access to services, with people citing this factor more likely to be women, widows and those with poor health (Smetcoren et al., 2017, p. 97–99).
- ▶ Only 7% of homes have the most basic accessibility features (Habinteg, 2018, p. 2).
- ▶ The UK HAPPI report emphasises the importance of high-quality design in ensuring the living environment of home and neighbourhood are suitable and desirable for older people in order to increase housing options for all (Best and Porteus, 2012, p.4).

How do older people decide whether to move or not?

Older people's decisions to move (or not move) can be described as a process of 'option recognition' (Peace, Holland, & Kellaheer, 2011). 'Option recognition' describes how people tend to make an assessment of the appropriateness of their current environment in relation to their personal situation (health, social connections, aspiration), and whether other options would suit them better. This process takes into account logistical challenges involved with moving including cost (taxation, professional fees, removal services), effort, and available help (either family, friends or policy driven support).

While grounded in the actual options to improve the quality of life from which each older person can select, option recognition is a complex, individual assessment which weighs pragmatic, felt and imagined factors.

Recognising the centrality of this decision process to the actual moves that older people can and do make is the critical purpose of the concept of rightsizing. Its requirement that we should understand and respond to the actual **availability** and **accessibility** of housing options for older people reflects our analysis of how the wide range of personal and environmental factors outlined above are implicated in making these quality of life decisions.

5. The moves older people make

Of the small percentage of older people in the UK who move, the majority have tended not to ‘downsize’; would prefer to stay in their existing property and had not planned to move. This research finds that there are two key drivers for these moves – **accessibility and availability**.

To understand the kinds of moves that older people make, we tracked 3,664 older people (50+) who moved over the last 17 years, based on analysis of the British Household Panel Survey (BHPS) and the Understanding Society (US) study.

The British Household Panel Survey is a national, multi-topic, longitudinal study undertaken between 1991-2008 that collected demographic, social, environmental and behavioural data from individuals in the United Kingdom. The study was repeated annually with a cohort of approximately 40,000 people selected to be broadly representative of the UK population.

The BHPS was folded into the Understanding Society Survey in 2009, providing a continuity of questions between the two studies. The US follows on from the BHPS keeping a large continuity of questions and a similarly significant sample size.

Both The BHPS and the US are multi-topic surveys involving a wide range of demographic (personal) and environmental information about households across Britain including when, where and why they have moved over the course of their life. The BHPS/US is a very useful data source because it explains why particular options were taken, noting the motivations for moving both before and after moving.

We filtered the data to only include respondents aged 50 years and over who had changed residential address since the last survey, analysing

data from their response both immediately before and after the move took place.

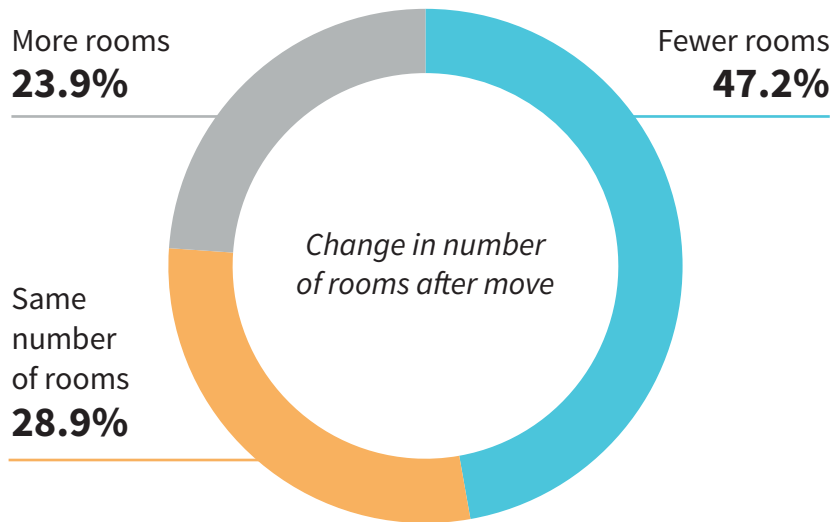
This allowed us to investigate the differences between respondent’s previous homes and the one they moved into, as well as thoughts about moving home before they actually moved (and in many cases before they knew they would be moving in the next year).

We looked at the moves of older people defined as over 50 to explore the moving patterns of different types of older person including those moving proactively in early later life. Our analysis attempted to discover what influence the personal and environmental factors outlined in section 4 had on the kinds of move people made.

Our research analysis highlighted the complex nature of the moves people make. It was immediately clear that many factors are significant in the decision to move and that individual factors and combinations of factors are a very poor indication of the likelihood of moving. However, when many factors were considered together two key drivers emerged. From our literature review, we combined all push, and all pull factors which could be identified in the BHPS/US data set to create two categories with clear and distinct characteristics.

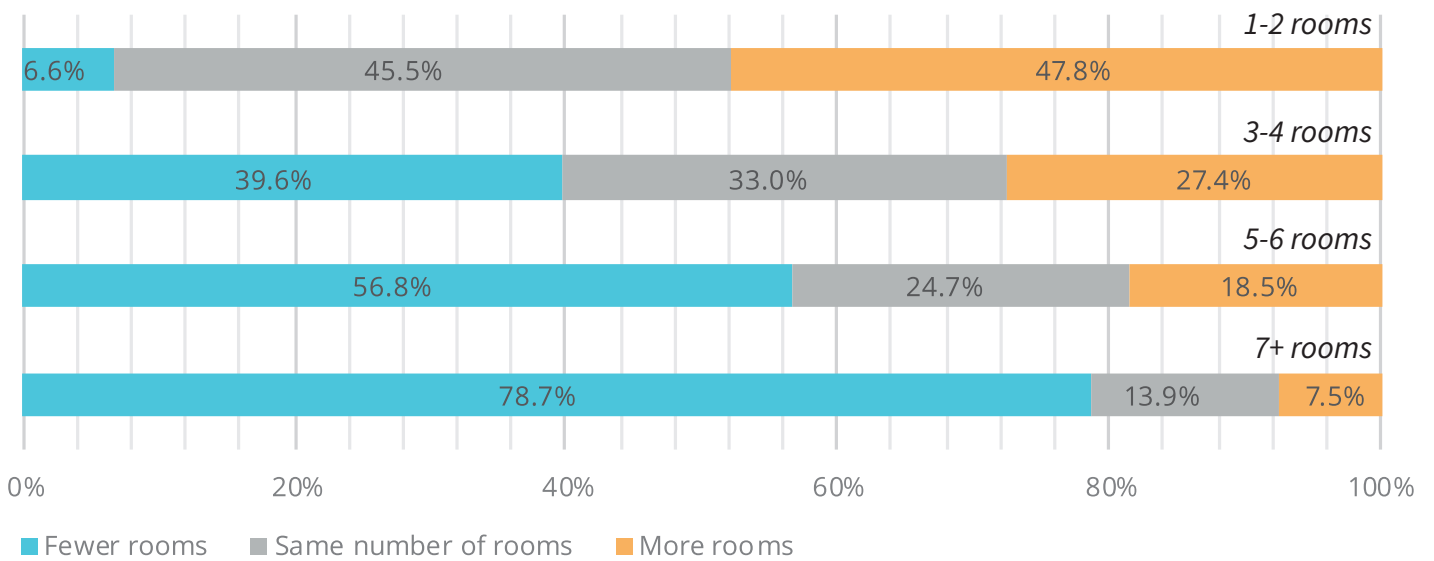
We propose that the **availability** and **accessibility** of housing options provide a useful description of the key features of the sample and the key findings are set out overleaf:

1. Most older people don't 'downsize'.



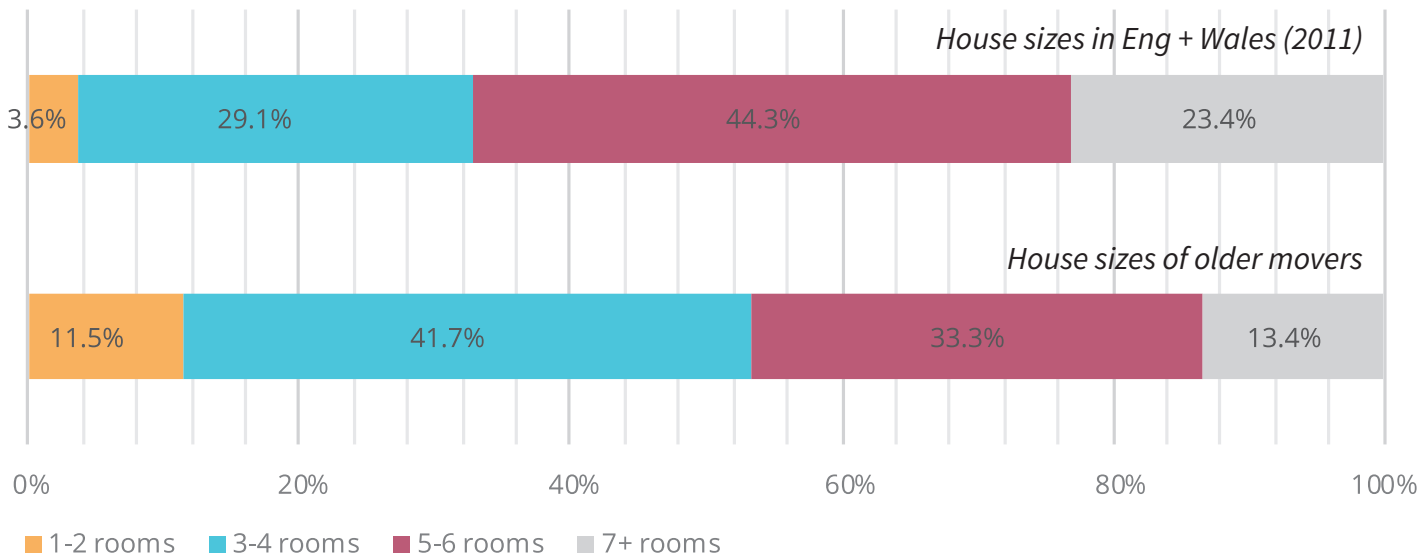
- ▶ 47.2% of moves by older people are to smaller properties.
- ▶ Moving to a smaller property is more common over the age of 80, and is more commonly done by people in social or private rental accommodation.
- ▶ Most people who downsize only reduce the number of rooms in their property by one.

Change in number of rooms by size of home prior to move (age 50+)



2. Older movers already live in smaller than average houses.

House size in rooms (Eng & Wales) and house size of older movers

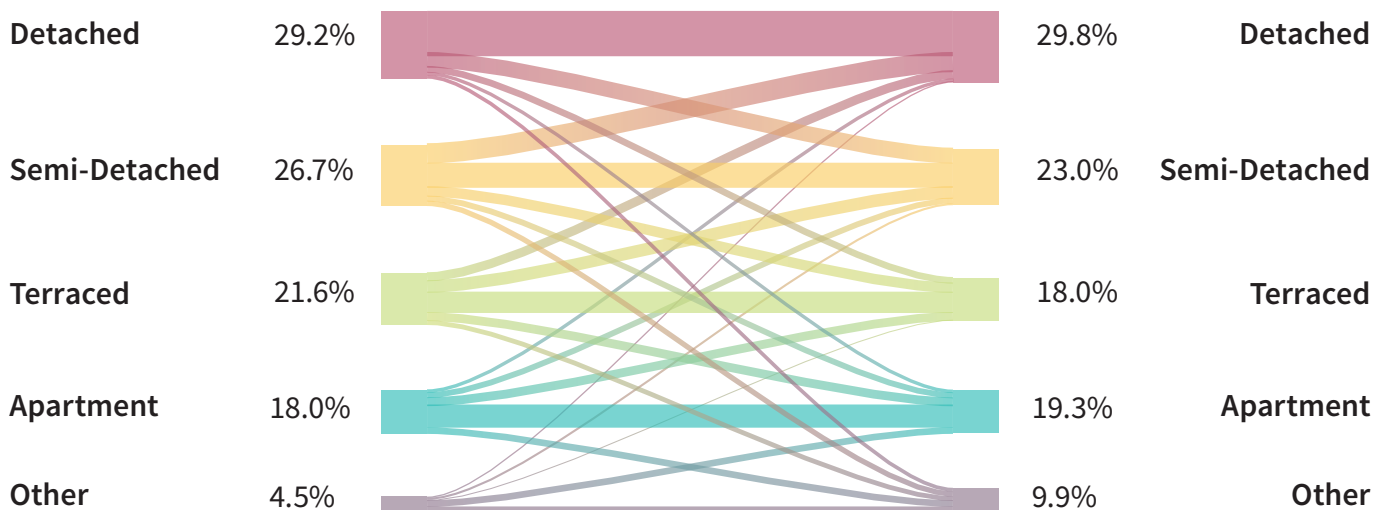


- ▶ Older people living in smaller properties – studios, one bedroom and two bedroom homes – are more likely to move.
- ▶ The size of a property alone doesn't determine its suitability.

3. Although older people move between housing typologies, there is not a strong trend towards specialist housing.

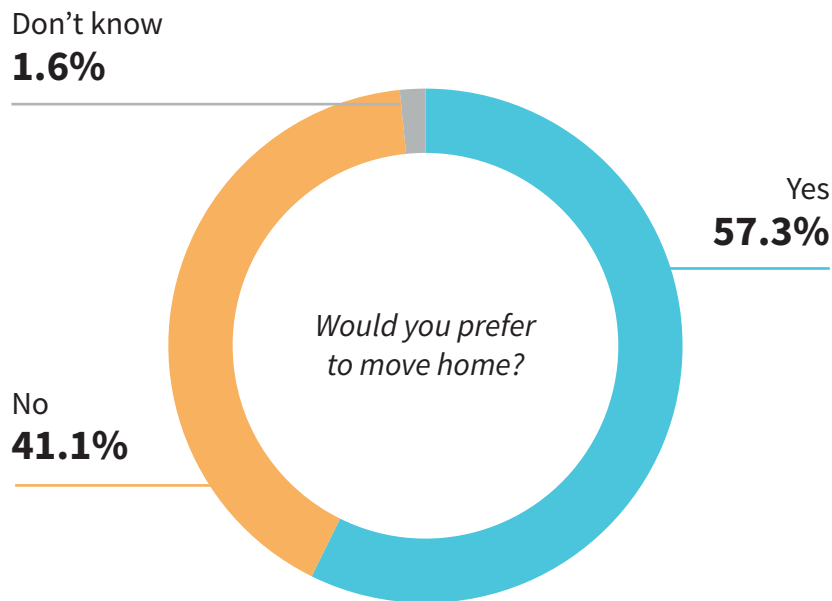
Before move:

After move:



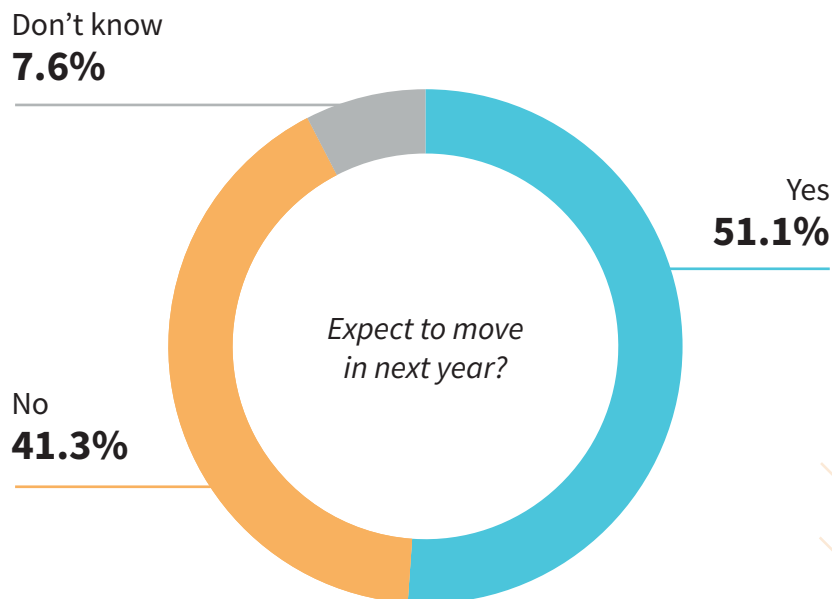
- ▶ Specialist housing ('other') is more common in the 70+ age group, but even then only accounts for 24.4% of moves.

4. A significant minority of older people moved after saying they would prefer to stay in their current home.



- ▶ This implies that many moves made by older people are not 'rightsizing' decisions, but forced or crisis moves.
- ▶ There is little variation in the responses of younger (50-69) and older (70+) age groups.

5. Only half of older people expected to move when asked one year prior to moving.



- ▶ This suggests that a large number of moves are linked to events over the lifecycle which necessitate a move.

6. Two types of mover can be identified – driven either by the availability or accessibility of a better living environment.

Availability driven

- ▶ Based mostly on aspiration, dependent on the (limited) availability of options that allow them to meet these aspirations.

Reasons for moving

- ▶ Moving in with partner/new spouse.
- ▶ Move to be closer to family or friends.
- ▶ Move for work or to reduce commuting time.
- ▶ Move after retirement (ie. when proximity to work is no longer needed).
- ▶ Wanting better home quality/larger home.
- ▶ Wanting a specific type of accommodation.
- ▶ Wanting to become a homeowner.
- ▶ Wanting more privacy.
- ▶ Wanting to move to a specific place/ a rural community.
- ▶ Wanting a change.

Accessibility driven

- ▶ Based mostly on problems, dependent of the (limited) accessibility of options that allow them to solve these issues.

Reasons for moving

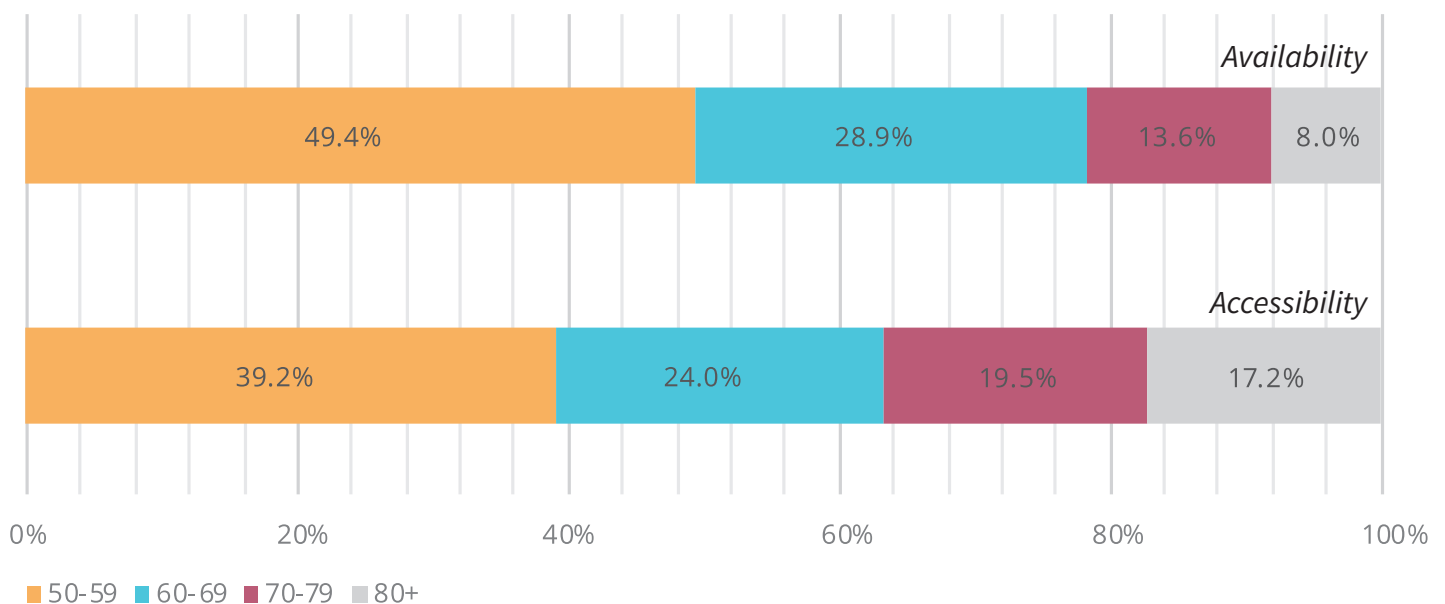
- ▶ Moving away from spouse/divorce.
- ▶ Eviction from rental accommodation.
- ▶ Poor housing conditions (eg damp).
- ▶ Problems with home design (eg. unable to climb stairs).
- ▶ To go to accommodation with health support.
- ▶ Dislike current house.
- ▶ Feeling socially isolated.
- ▶ Moving away from bad neighbours, noise or crime.

Availability movers

- ▶ More likely to be younger, owner occupiers and couples.
 - ▶ More likely to move further from their existing home to wherever a better option is available.
 - ▶ Longer distance moves suggest a move to the country, into a city centre, to the seaside or closer to family members.
 - ▶ We can infer that moves can rarely be made in the same neighbourhood – older owner-occupiers are likely to possess a significant property asset relative to their neighbourhood making aspirational moves within their neighbourhood less likely.
 - ▶ There is no significant shift in council tax band, which suggests there isn't a strong movement to cheaper housing as a means of equity release.
- ▶ Older people with means may be seeking to make lateral status moves, as they are not moving to less valuable homes.
 - ▶ Slightly more likely to say they wanted to move (66%), but many moves are unplanned or spontaneous.
 - ▶ Most likely to move to a similar size property or a larger property, despite already living in larger properties than those driven by accessibility needs.

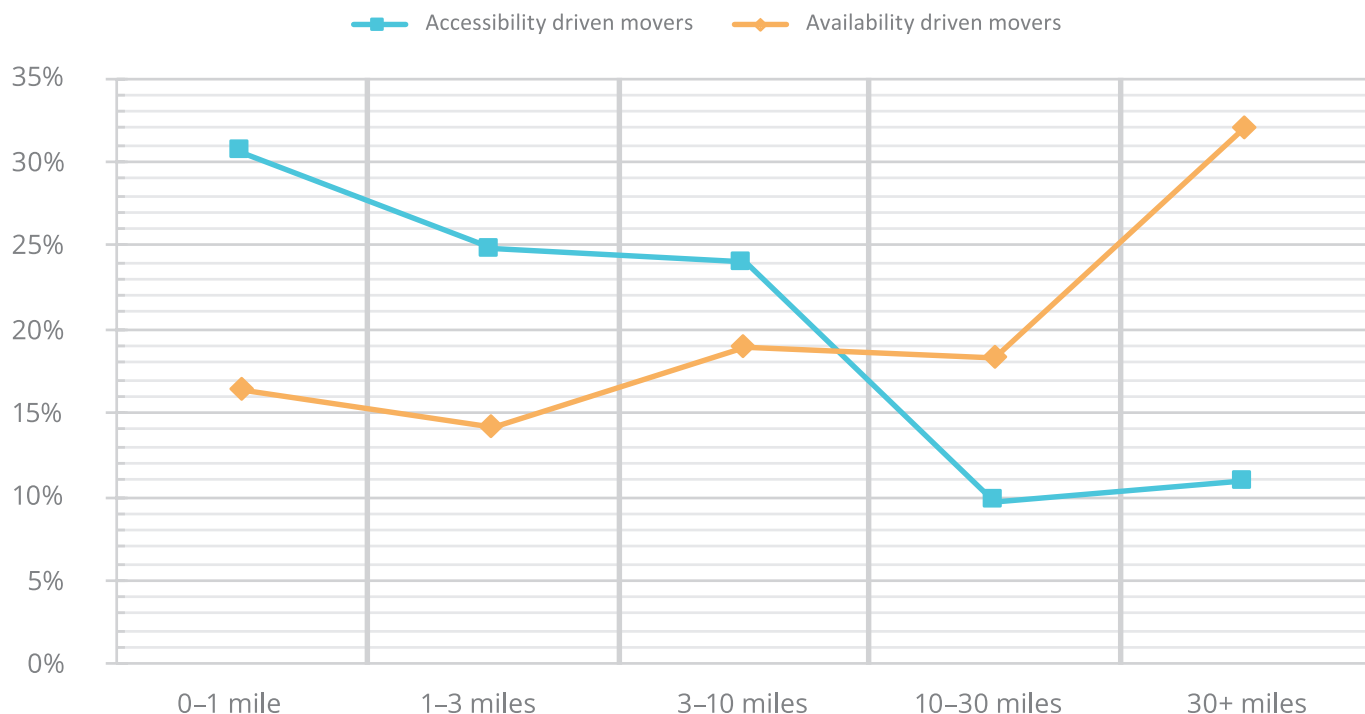
7. Availability driven movers are more likely to be younger.

Age by type of mover



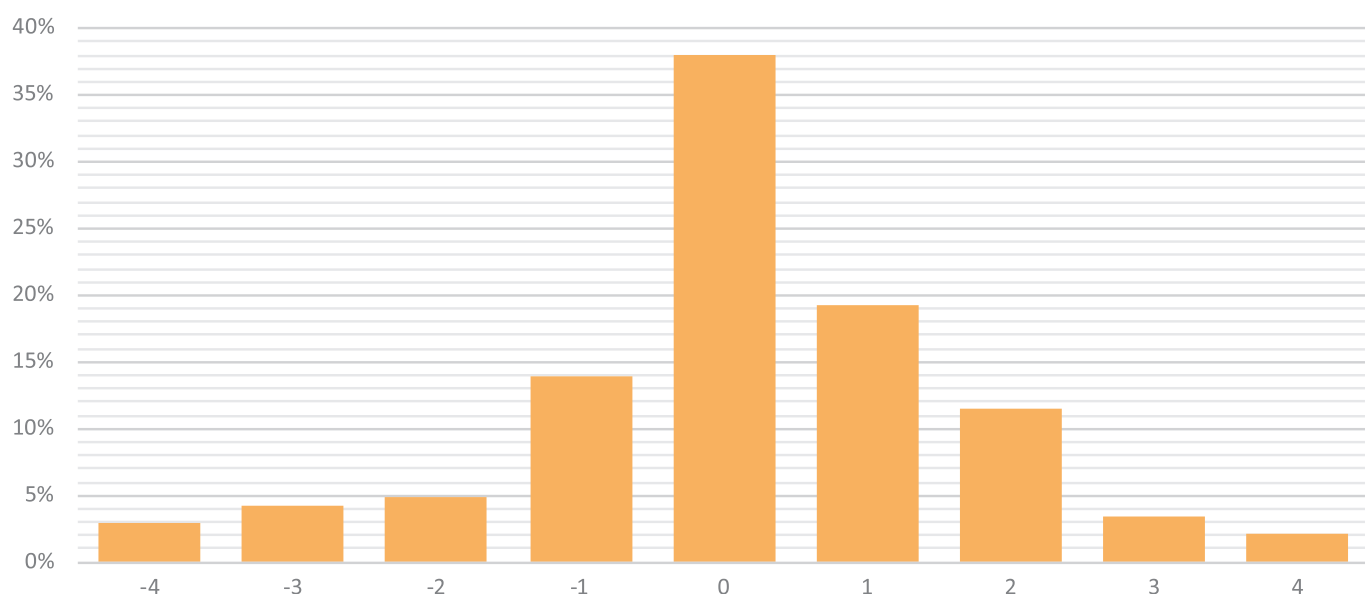
8. Over half of availability driven movers relocate more than 10 miles away from their previous home.

Distance moved by type of mover



9. Availability driven movers are slightly more likely to move into a higher council tax band when they move.

Change in council tax band (availability driven movers only)

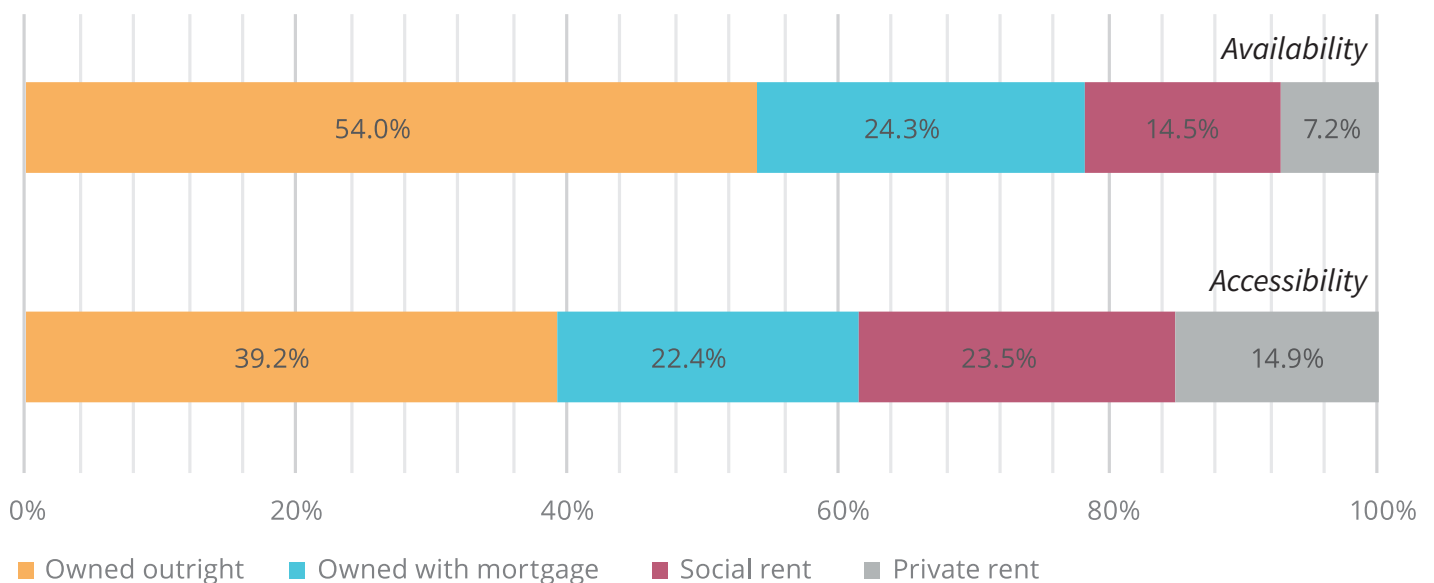


Accessibility movers

- ▶ More likely to be older, social or private renters.
 - ▶ More likely to be living alone (44.1%), but over half of accessibility movers were living in couples.
 - ▶ Many move as a result of life-course changes – divorce, widowed, illness, eviction, unemployment.
 - ▶ More likely to stay within existing neighbourhood (within three miles of previous address) – particularly those who are social tenants.
 - ▶ This suggests that ageing in place is accessible to social tenants because their landlord is supportive in assisting them to move to housing that meets their needs.
- ▶ Older renters are most likely to move in later life.
 - ▶ There is insufficient evidence to suggest whether this is due to the flexibility that rental offers, which allows them to access more appropriate housing as the need arises, or due to the precarious nature of the rental market that forces them to move more frequently.
 - ▶ More likely to say they didn't plan to move and that they preferred not to move when asked one year previously.
 - ▶ More likely to be living in smaller properties (1-4 bedrooms).
 - ▶ More likely to move to smaller properties – 54.6% of accessibility driven movers relocate to smaller properties.

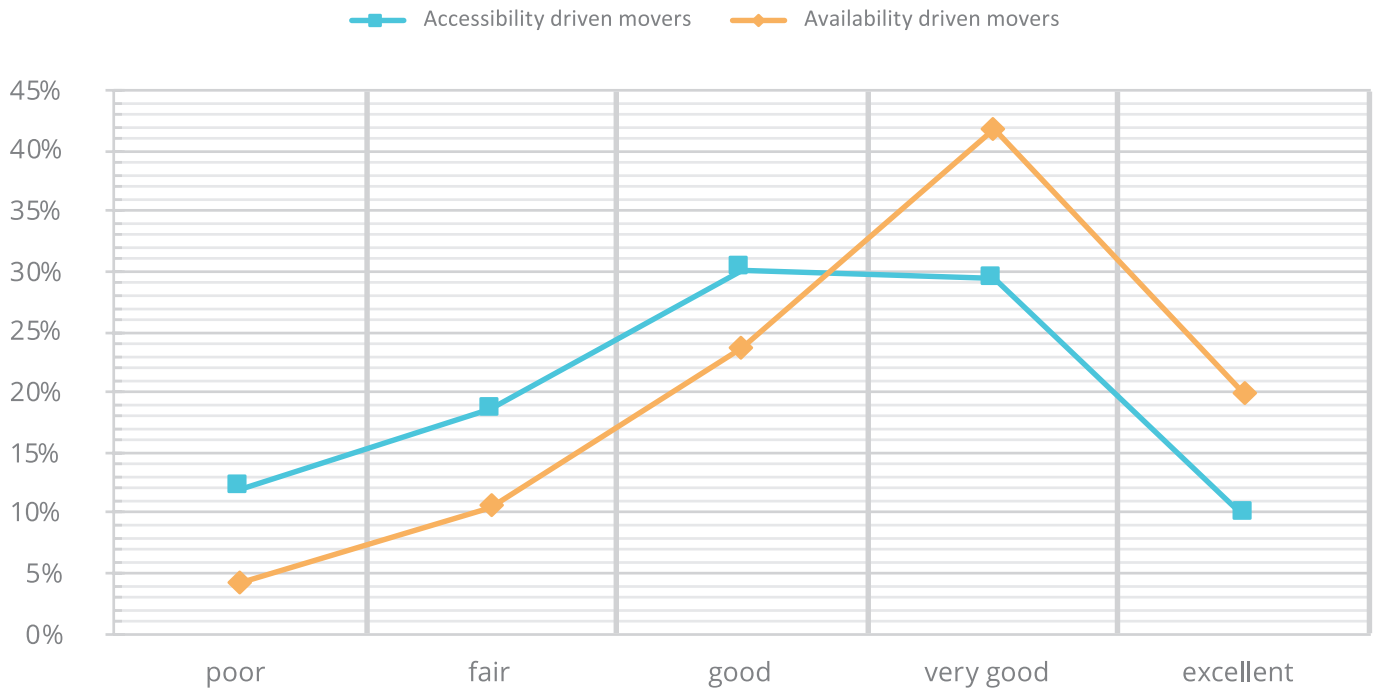
10. Accessibility driven movers are more likely to be renters, but the majority are still owner occupiers.

Tenure of older population (Eng+Wales) and tenure of older movers



11. Accessibility driven movers are more likely to be in poorer health, but this is a result of the older average age of this group.

Health by type of mover



6. Defining the rightsizing gap

Rightsizing should be seen as an older person's active choice to move home as a means of improving their quality of life.

Rightsizing recognises that the situations, desires and needs of the older population are no less diverse than their families and children. It is anchored by the idea that a residential environment that provides a better quality of life is always theoretically possible, but that the actual choices available to older people are limited to the housing provisions that are both available and accessible to them.

The research in this report suggests that the vast majority of older people currently tend to age in place until circumstances mean their home environment becomes a decisive barrier to their well-being. Other research indicates that very few properties are designed to support ageing in place.

Whilst many people do not wish to move home, there is evidence that there is large scale unmet demand to move (*Pannell et al., 2012*), and that the inability to move when circumstances change can lead to loneliness, reduced social networks, increased levels of dependency and health issues caused by poor housing conditions (*Hillcoat-Nallétamby & Ogg, 2014; Sixsmith & Sixsmith, 2008*).

Wealthier groups are shown to be able to move further to satisfy their housing needs, and social tenants the most likely to be able to access specialist accommodation when moving. This suggests there may be a large number of people in the middle (potentially around 60% of the population of over 50's) for whom there are no options other than to remain in their current home, regardless of its suitability (*Park & Ziegler, 2016, p. 5*).

The conclusion can be drawn that large numbers of older people accept a gradual and sometimes sudden reduction in their quality of life due to the lack of adaptability or suitability of their accommodation. This research suggests that they are unable, for reasons of both **accessibility** and **availability**, to improve these circumstances.

This represents a significant number of older people who may find themselves in the 'rightsizing gap' at a time when they are least able to address it.

Identifying 'gaps' in rightsizing options is proposed because it emphasises enabling individuals to plan for their future rather than ensuring basic availability in and after crisis.

The rightsizing gap can also be taken to indicate the potential future need in the general residential population for extensive support and specialist provision in times of crisis.

Impacts of the rightsizing gap:

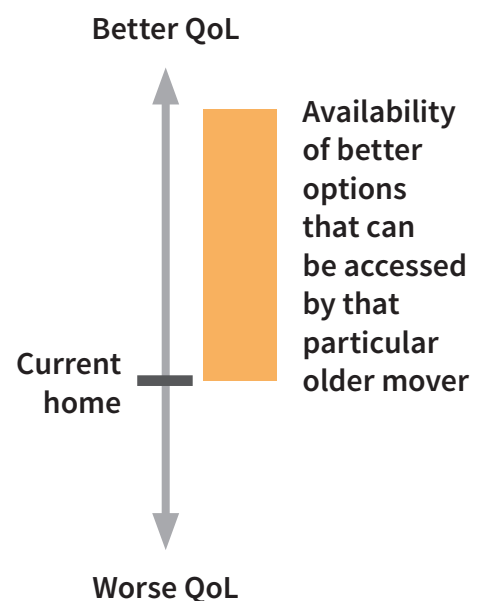
The negative impacts of situations like this for the wider health and social care system are widely discussed. However, the impacts of the rightsizing gap are felt in relation to older people's quality of life not just in terms of increased demand in the health system.

The specific groups of older people who may face life-limiting rightsizing options include:

- ▶ Older parents who live with their adult children. There are 3.35m adults (aged 20-35) who currently live with their (older) parents (*Bone, 2014, p. 3*).
- ▶ Those seeking to make proactive, midlife moves in social rental accommodation, due to high demand from people with higher needs for support.
- ▶ Those seeking low levels of formal or informal social support, who often end up in specialist housing with higher levels of care than desired. (*Pennington 2013*).
- ▶ Older people with low levels of savings or income, who struggle to afford removal services, stamp duty, survey, legal fees or rental deposits (*Pannell et al., 2012, p. 44*).
- ▶ Increasing numbers of older private renters, for whom the loosely regulated private rental market provides few protections or support in changing circumstances.

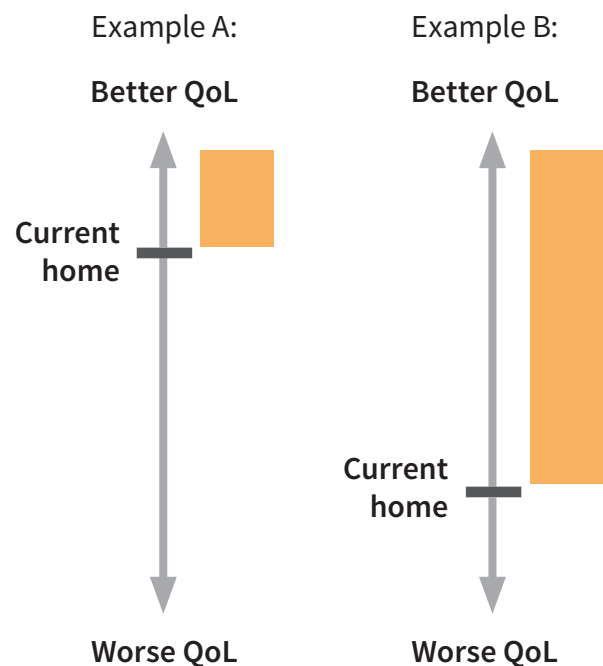
1. Rightsizing is an older person's active choice to move home as a means of improving their quality of life.

- ▶ A better quality of life cannot be defined by bricks and mortar – the decision about whether a home will improve someone's quality of life is influenced by emotional attachment, their relationships with family and friends, the disruption that moving might cause, the quality of the neighbourhood it is located in, or the social prestige that a home offers.
- ▶ No single factor can be used to define what a better quality of life is – it is the trade-off between them that leads the process of option recognition.



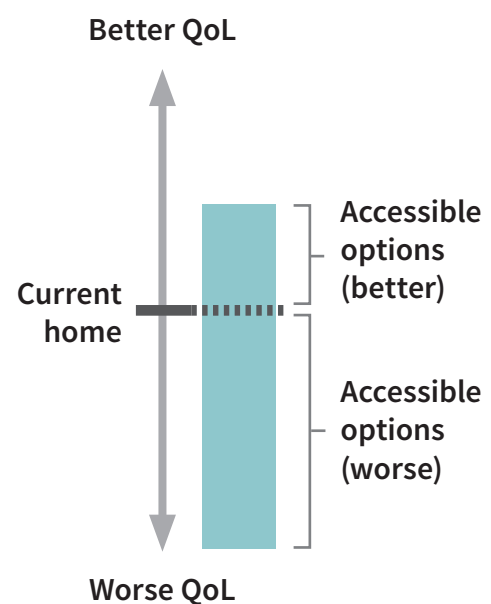
2. The ability to rightsize is affected by the availability of options that offer a better quality of life. The attractiveness of different options can change over time.

- ▶ Rightsizing requires attractive options to physically exist.
- ▶ Changes to personal and environmental factors can lead to options becoming more or less attractive over time.
- ▶ Strong social bonds within a community could make moving away seem less advantageous, therefore reducing the number of options likely to be considered to offer a better quality of life.
- ▶ The loss of a social network might loosen ties to a community, making options in other areas seem more beneficial (increasing the number of 'better' options).
- ▶ Improved neighbourhoods can reduce the desire for further rightsizing options.



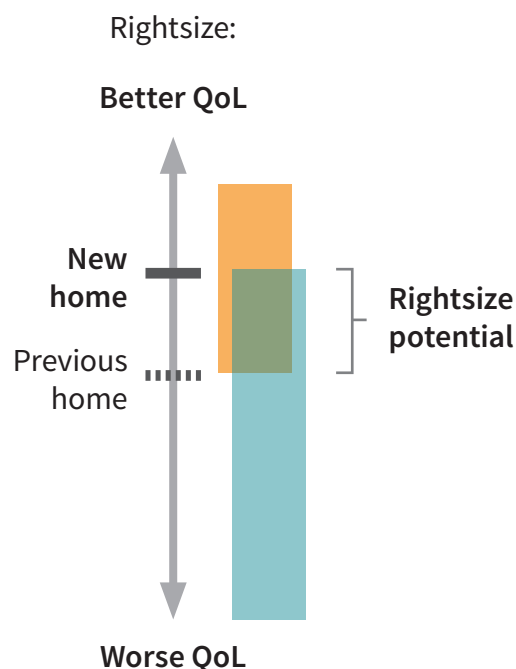
3. Older people's capability to rightsize is dependent on desirable options being accessible to them

- ▶ An option is only accessible if an older person can actually obtain it.
- ▶ For many, accessibility refers to the house or rental prices, and the expenses involved in moving home. For others, accessibility is defined by factors related to tenure.
- ▶ Some social tenants might be supported to move out of inappropriate housing by their landlord. Certain properties in the social rental sector might only be accessible to someone when a certain level of medical need has been reached.
- ▶ A worse option is usually accessible, but a better one is not accessible for many people.

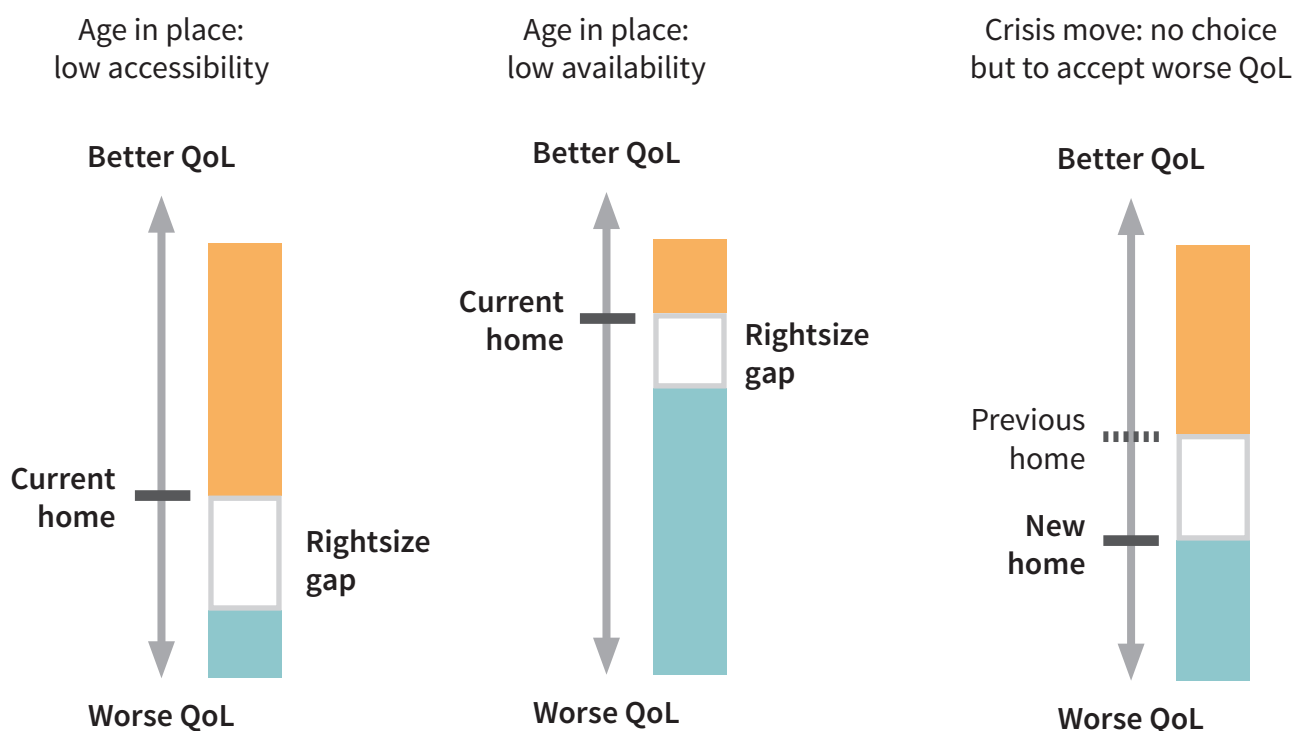


4. Rightsizing can only occur when better options are both available and accessible.

- ▶ When better options are both accessible and available, rightsizing takes place.
- ▶ If there is a gap between availability and accessibility of better options, individuals will have to age in place.
- ▶ The reasons for the gap are individual and could be driven primarily by lack of availability, accessibility or both.
- ▶ People will not move to somewhere offering a worse quality of life unless they are forced to do so, usually for health or financial reasons. This is a crisis move.



5. A rightsizing gap occurs when better options are unavailable or inaccessible – as many as 60% of the population of older people may be in a situation which means they would not be able to rightsize if desired.



7. Assessing availability and accessibility

This case study section outlines a method for exploring rightsizing options in place, and sketches potential responses for a range of stakeholders which would help reduce the rightsizing gap.

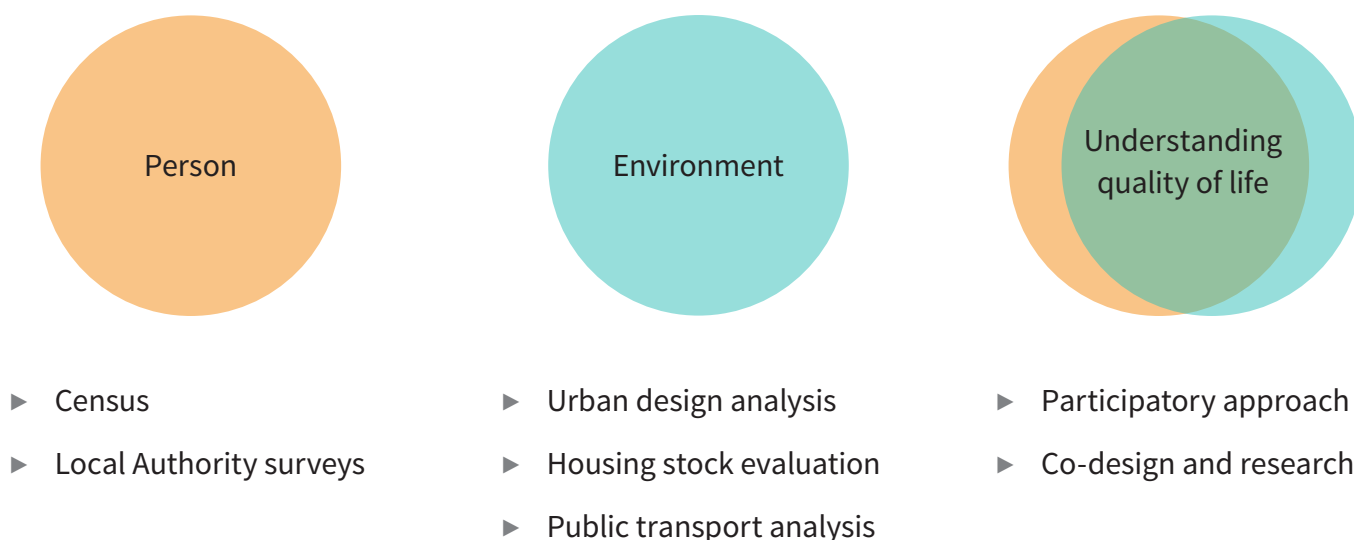
Understanding the availability and accessibility of housing options in place in order to tackle the rightsizing gap requires an understanding of the quality of life that older people have in their existing homes and communities, and the potential for this to be improved through moving home, adaptations or changes to their neighbourhood.

Measuring a persons quality of life is a judgment based on the relationship between personal and environmental factors, both at the present moment and in the future. Developing a place-based neighbourhood plan which responds to these factors requires not just an examination of the people who live there and the built environment of the neighbourhood, but a participatory approach which considers the relationship between them.

Whilst desktop analysis enables some insight into the dynamics of the rightsizing gap, it is

equally important to explore how these factors are combined through the aspirations and dispositions of older people in a specific place. As a result, we propose that a participatory approach may be the most appropriate way to understand older people's quality of life, and discover what interventions might better support them as they grow older.

Using Stockport, Greater Manchester as a case study site, this section outlines potential methods to better understand the personal and environmental factors that might inform a rightsizing plan, and how these could benefit from co-design and co-research approaches. Whilst these methods are in no way exhaustive, they proffer a starting point for a place-based exploration of rightsizing through which local action plans might emerge.



1. Person/Population analysis

Census data can provide a diverse range of insights into the older population. It enables identification of some key characteristics of older people within a neighbourhood, which might then identify areas for particular investigation within a place-based neighbourhood plan.

For example – the maps below show the proportion of older people (50+) living alone, and the proportion of older people (50+) living in socially rented properties. Each of these variables might influence how a local plan is created. We can assume that the housing offer within a neighbourhood plan would need to be very different for an area where lots of older people lived alone, compared to areas where most older people lived with others.

Looking at data together also allows us to generate a richer picture of the current population. In the Brinnington and Central ward (circled), for example, census data shows that there is a high number of social renters in the

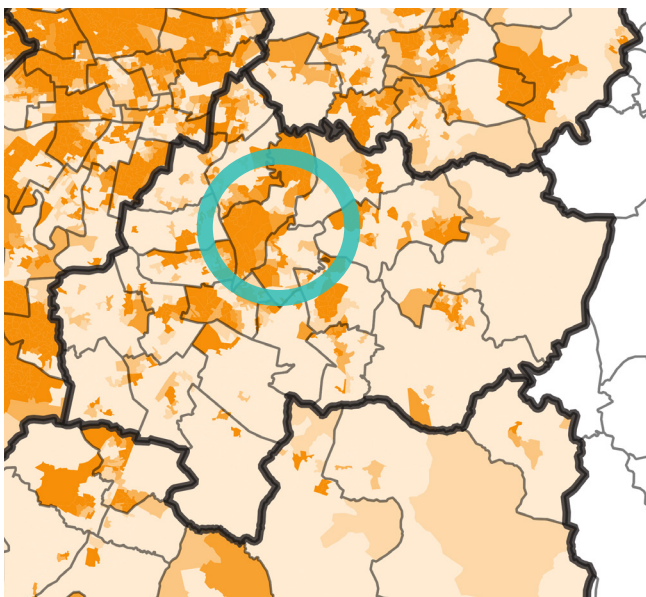
50-64 age group who report that their day-to-day activities are limited. This might lead to a different response in Brinnington and Central compared to other areas.

A desk-based population analysis has obvious limitations. Although demographic information might highlight groups that we assume need certain types of housing offer, it is unknown whether their current environment already meets their needs, or what their aspirations might be. This is why it is more revealing for this information to be used in conjunction with environmental analysis and as part of a participatory planning process.

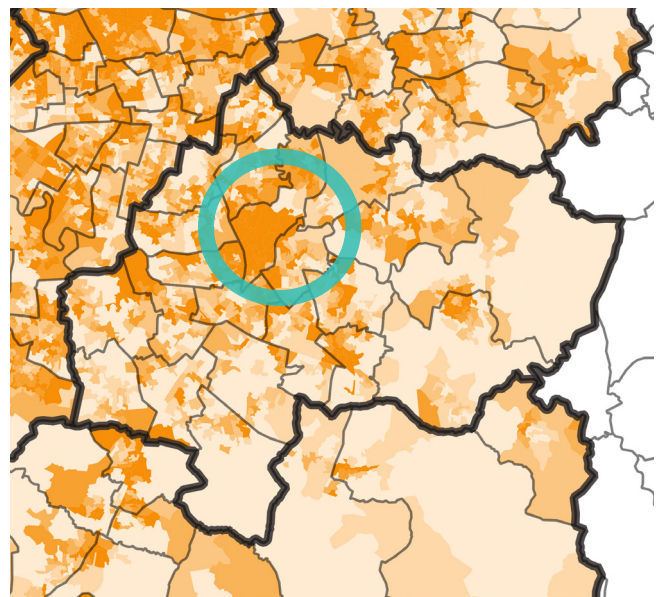
Resources:

Office of National Statistics ‘NOMIS’ – for raw census data, including data filtered by age or geography. <https://www.nomisweb.co.uk>

Datashine – spatial representations of many census questions, although few age-specific variables. <http://www.datashine.org.uk>



Percentage of older people (50+) living in social rental properties (Census 2011)
Darker=more social renters



Percentage of older people (50+) living alone (Census 2011)
Darker=more people living alone

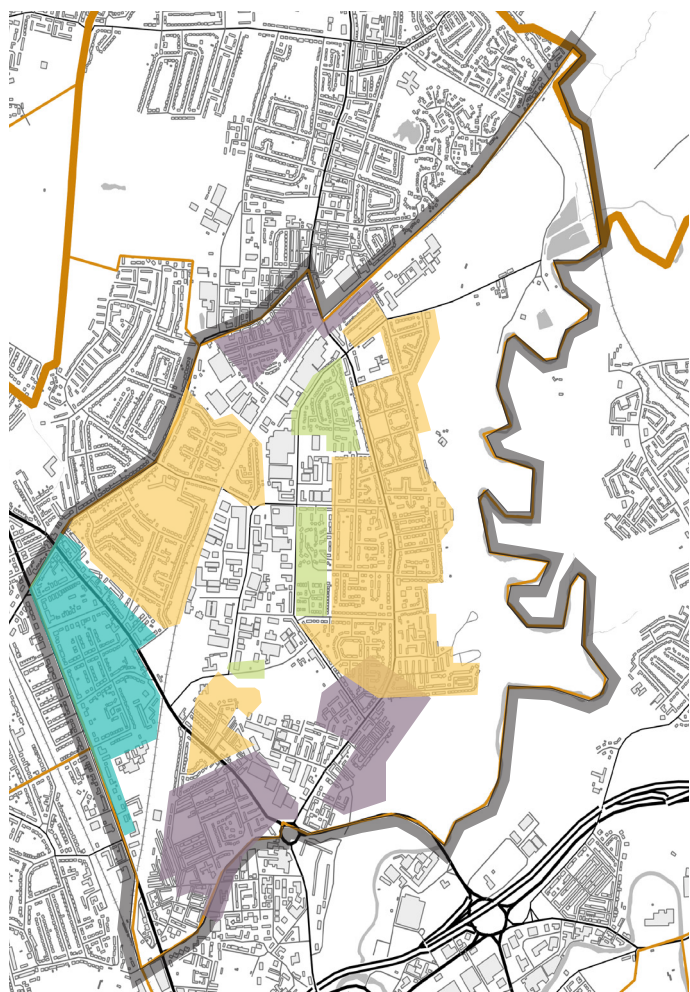
2. Physical environment analysis





Analysis of the physical environment can be developed from a wide range of sources and methods, such as census data, locational data, topographic data, housing market analysis or bespoke urban design analysis (asset mapping, transport analysis, house typology analysis etc.).

The map below shows a simple house typology analysis on the Reddish South area of Stockport. It was developed using historical maps (to identify era) and desktop analysis using aerial mapping (Google, Bing etc.) and real estate websites. For many urban areas there is very limited house type diversity in a given neighbourhood. The map shows particular areas where the housing stock is likely to lack accessible features (such as 1900-1930 terrace housing, which often has steep stairs, narrow doors etc.) and others where adaptations might be more feasible (including

bungalows sites). The limitation of this kind of analysis is that it does not provide information about the lived experience within the neighbourhood. For example, a road of houses that we assume has 'low accessibility' might also have a stable, supportive community that provides older residents with a high quality of life.

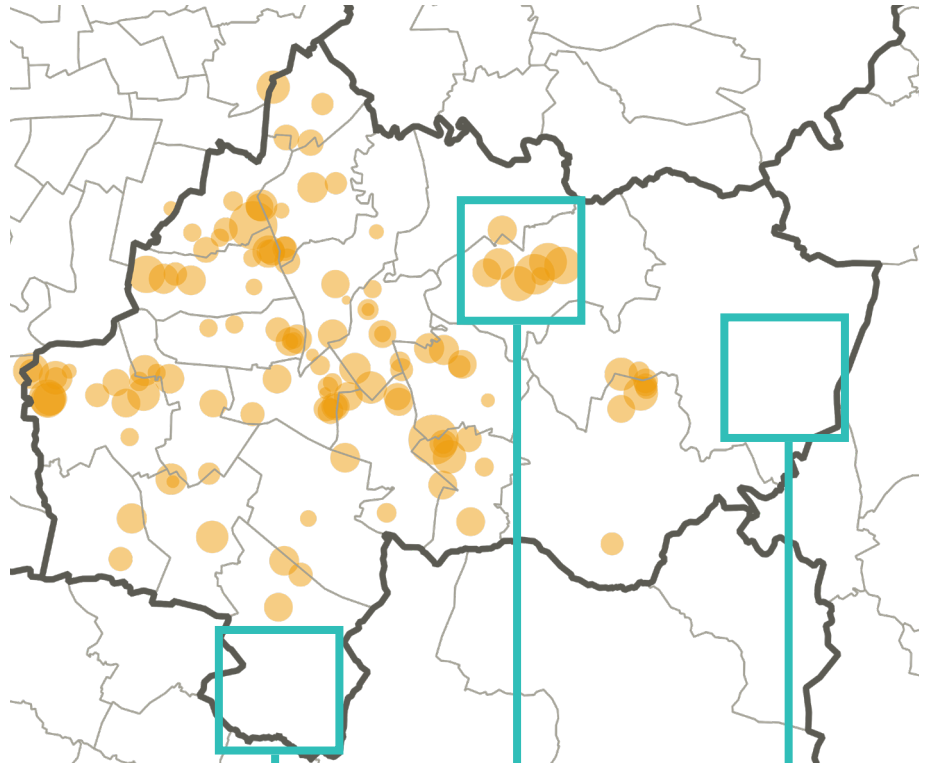
Where possible, information could be cross-referenced to develop a more nuanced picture. The maps opposite show both locational data (location of age-restricted (50+) housing in Stockport) and census data (areas with a high number of large properties). By looking at these sources together it is possible to identify conditions in neighbourhoods that could not be seen by each source individually, thus helping to create a stronger hypothesis of the housing offer to be tested with input from local communities.



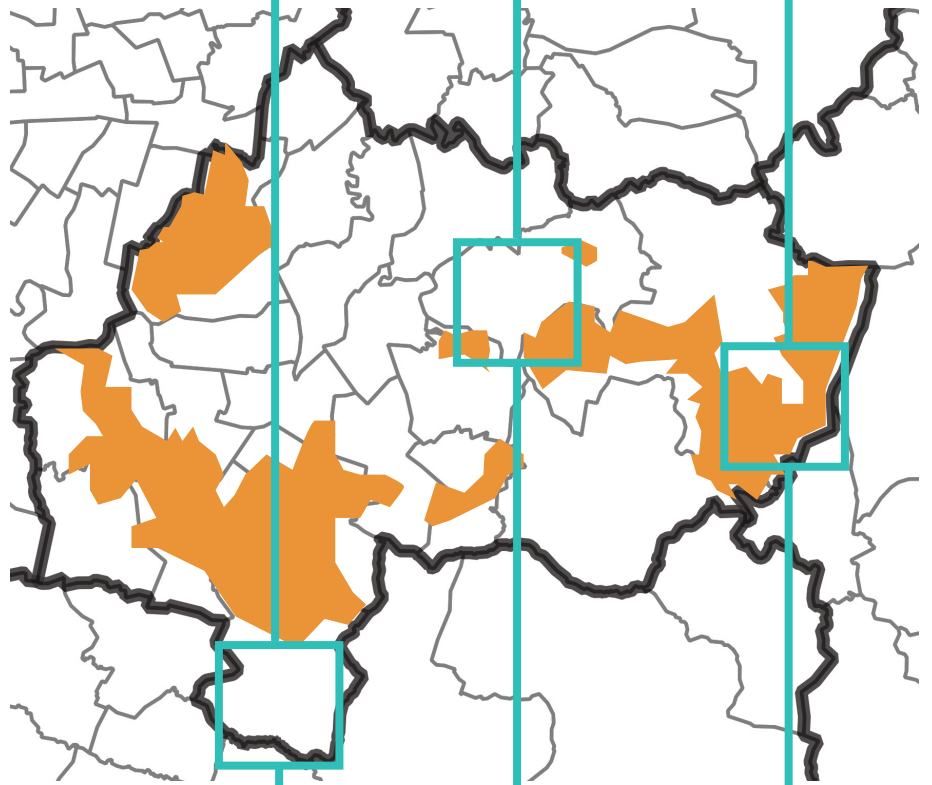
-  Likely to have limited accessibility, and difficult to fully adapt (eg. pre-war terrace housing).
-  Could have limited accessibility, but simpler to fully adapt (eg. post war semi-detached).
-  Likely to have limited accessibility, and high maintenance/heating costs, but potential to adapt (eg. large Victorian semi-detached).
-  Newer properties/bungalows with no need to adapt/simple adaptations.

Left: House type/era analysis for Reddish South, Stockport

Provision of age-restricted accommodation



Areas with high proportion of 3+ bedroom houses



No specialist options, but diversity of smaller properties

Diversity of specialist housing and different size properties suggests good availability of options

No specialist provision and few smaller properties suggest limited options for oldest age groups

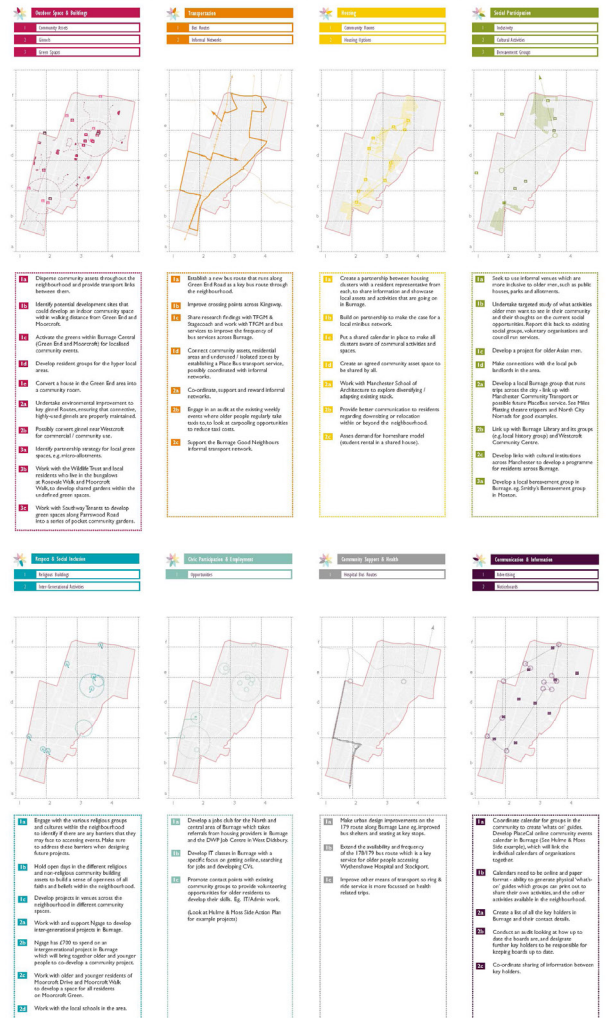
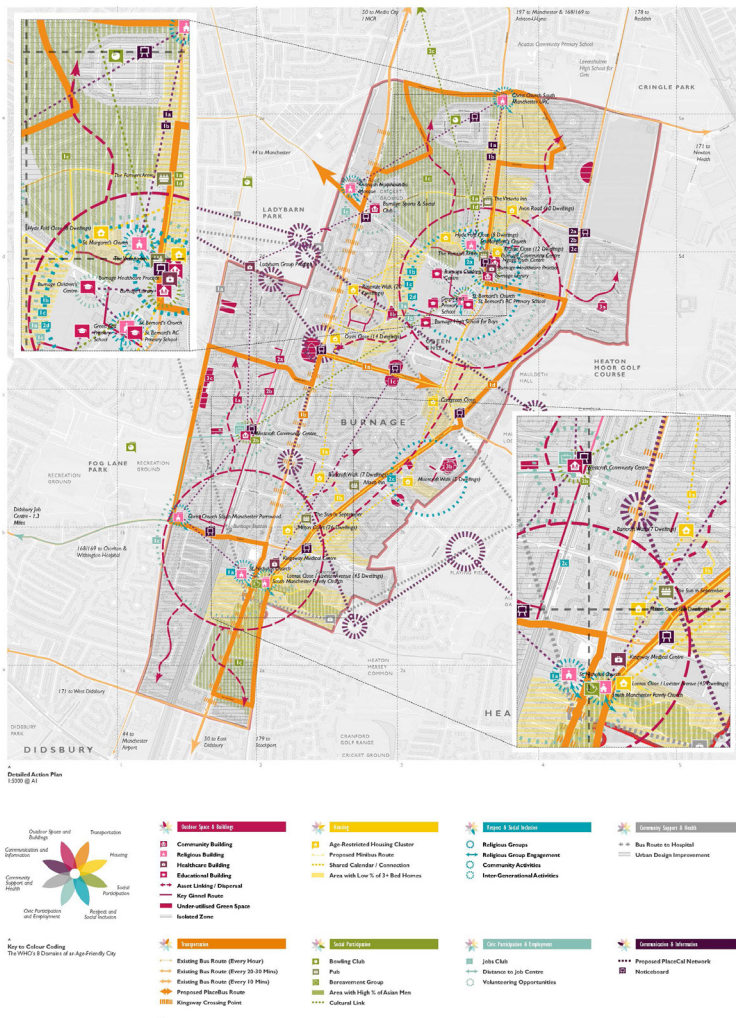
3. Participatory approaches

A desk-based analysis of an older population and the environments they live in provides useful baseline information, but limited insight into the actual experiences and aspirations of a local community. They can be used as a starting point for conversations with local older people about their desired housing offer, informed both by the existing accessibility/availability of housing, and what is required by those living in a community.

The Manchester Age-Friendly Neighbourhood (MAFN) project, developed by Manchester School of Architecture and Southway Housing Trust, is an example of how a participatory co-design approach can be used to generate a place-based neighbourhood plan. Southway Housing Trust are a housing association who for the last decade have been working to make their homes and communities more ‘age-friendly’.

Baseline information (based on population and environmental data) was used as the starting point for four collaborative action plans across Manchester, identifying ways to improve the quality of life of older people. This included discussions about housing, but also factors such as social participation, transport and health. The action plans developed through a series of workshops, public forums and events with community groups and housing providers.

By creating opportunities for older people to participate in the action planning process as equals, the MAFN programme demonstrates how a collaborative programme of co-design can support local and nuanced insights into the experiences of older people, and the aspirations of a neighbourhood (Hammond and White 2018; Crompton et al. 2018).



Right: Co-design-research event as part of the Age-Friendly Hulme and Moss Side programme.

Left: Age-Friendly Action Plan developed in Burnage, Manchester.



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