



Caerphilly County Borough
2nd Replacement Local Development Plan 2020-2035

EB10: Later Living Study

October 2025



Housing LIN

Connecting people, ideas and resources

A Study Into The Factors That Influence Moving In Later Life

Report for *Caerphilly County Borough Council*

Version: Final

October 2025

Lois Beech, Consultancy and Partnerships Manager

Ian Copeman, Business Director

Cicily Biju, Senior Data Analyst

Contents

Contents.....	1
Executive Summary	3
1. Introduction	7
2. Welsh government policy context	8
3. Evidence and best practice review	10
<i>Older people's interest in and likelihood of rightsizing/moving in later life.....</i>	<i>10</i>
<i>What encourages/influences older people to rightsize/move in later life?</i>	<i>11</i>
<i>Preferences and priorities of a new home</i>	<i>13</i>
<i>Barriers preventing people from rightsizing/moving in later life</i>	<i>16</i>
<i>Good practice in relation to rightsizing: How other social landlords have overcome barriers to rightsizing</i>	<i>18</i>
<i>New build 'rightsizer' accommodation</i>	<i>18</i>
<i>Refurbished 'rightsizer' accommodation</i>	<i>22</i>
<i>Marketing and supporting people to 'rightsized'</i>	<i>23</i>
Summary of evidence and best practice: Implications for Caerphilly County Borough Council..	26
4. Demographic profile and housing circumstances of the older population in Caerphilly County Borough.....	28
<i>Demographic profile of older people (50+).....</i>	<i>28</i>
<i>Current supply of older persons' accommodation in Caerphilly County Borough</i>	<i>36</i>
<i>Further details and demographics of the people living in the current supply of older persons' accommodation in Caerphilly County Borough</i>	<i>38</i>
<i>General needs housing occupied by residents aged 55+</i>	<i>41</i>
<i>Home adaptations amongst 55+ households</i>	<i>41</i>
Summary of demographic evidence and existing supply: Implications for Caerphilly County Borough Council.....	44
5. Primary research	46
Primary research methodology.....	46
Demographic data of research participants with lived experience.....	47
<i>Survey respondent demographics.....</i>	<i>47</i>
<i>Qualitative research participant demographics</i>	<i>52</i>
<i>Primary research key findings</i>	<i>53</i>
<i>Older people's interest in and likelihood of rightsizing/moving in later life.....</i>	<i>53</i>

<i>What encourages/influences older people to rightsize/move in later life</i>	<i>59</i>
<i>Preferences and priorities of a new home</i>	<i>61</i>
<i>Barriers preventing people from moving/rightsizing in later life and how they can be overcome</i>	<i>70</i>
Summary of primary research: Implications for Caerphilly County Borough Council	73
6. Conclusion: Recommendations/Implications for Caerphilly County Borough Council	75
<i>Support ‘ageing-in-place’ in people’s existing homes</i>	<i>75</i>
<i>New build considerations</i>	<i>76</i>
<i>Existing Caerphilly County Borough Council housing considerations</i>	<i>78</i>
<i>Service offer considerations</i>	<i>79</i>
Annexe	81
About the Housing LIN	0

Executive Summary

Purpose and Methodology

This research, commissioned by Caerphilly County Borough Council (CCBC) and undertaken by the Housing Learning and Improvement Network (Housing LIN), examines the factors influencing decisions to move in later life among residents aged 50 and over in Caerphilly County Borough.

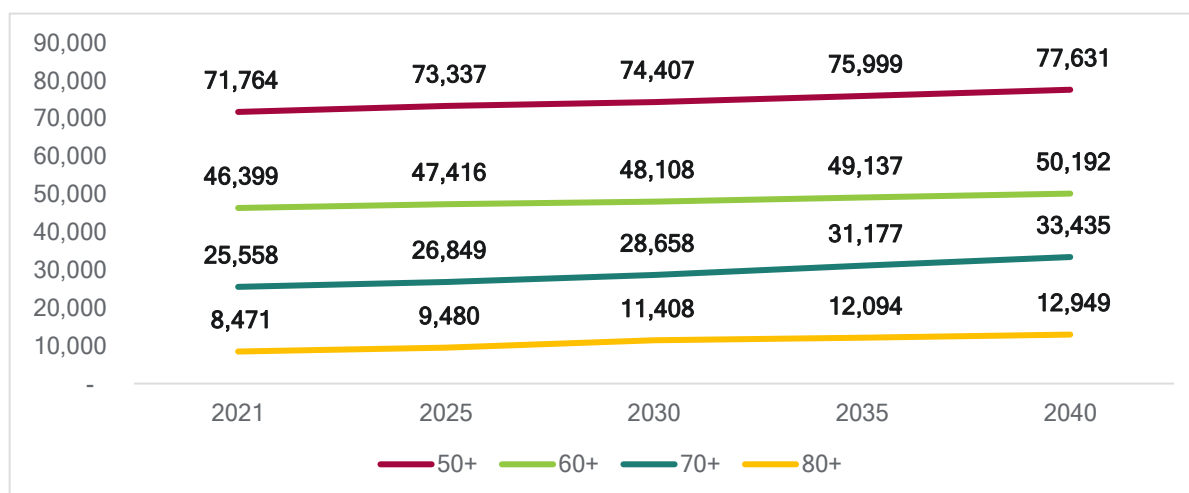
The study explored what matters most to older residents regarding their homes and communities, why and when they might choose to move, and how local housing and support systems can better meet their needs.

A mixed-methods approach included:

- A review of Welsh Government policy and national best practice on housing in later life.
- A demographic analysis of the borough's older population and existing older persons' housing stock.
- Primary research involving c.500 survey responses and focus groups/interviews with c.100 older residents and professionals.

Demographic context

The 50+ population is growing, with particularly sharp rises projected in the 70+ (25%) and 80+ (37%) age groups by 2040.



Source: ONS Census 2021, 2018 local authority population projections for Wales

Three-quarters (75%) of older households are owner-occupiers, though future generations may be more reliant on private or social rent.

Age cohort	Owned	Social rent	Private rent	Total
45-49	68%	17%	14%	100%
50+	75%	18%	7%	100%
60+	76%	18%	5%	100%
70+	78%	18%	4%	100%

Source: ONS Census 2021 N.B the data on households aged 80+ is not available

Deprivation remains unevenly distributed across the borough, with concentrations in the Upper Rhymney Valley and Caerphilly Basin.

A significant proportion of older residents live alone (around 40% of 50+ households) and many occupy larger, family-sized homes.

Household composition	1 bed	2 beds	3 beds	4+ beds	Total	%
One-person household	2,557	5,186	8,400	1,001	17,144	37%
Other household types	21	181	971	503	1,676	4%
Single family household: All aged 66 years and over	200	1,656	4,514	1,051	7,421	16%
Single family household: Couple family household	206	2,312	9,920	3,589	16,027	35%
Single family household: Lone parent household	41	834	2,569	431	3,875	8%

Source: ONS Census 2021

Health inequalities are evident, with residents in Caerphilly County Borough experiencing a lower healthy life expectancy than the Welsh average.

The borough's supply of older persons' housing is below Welsh averages for both retirement/sheltered and extra care housing, though age-designated housing is comparatively high in number but often poorly suited to modern accessibility standards.

Area	Housing type	Units	Population	Prevalence
Caerphilly County Borough	Retirement/sheltered housing	1,147	37,295	31
	Age-designated housing	2,389	37,295	64
	Extra care housing	77	17,822	4
Wales	Retirement/sheltered housing	23,989	698,560	34
	Age-designated housing	6,074	698,560	9
	Extra care housing	2,891	344,396	8

Source: EAC (2019) and HLIN

NB: 'Prevalence' denotes the prevalence rate – the number of homes (units) per 1,000 population aged 65+ for retirement/sheltered housing and age-designated housing and per 1,000 population aged 75+ for extra care housing

Primary Research: Key Findings

Older people's interest in and likelihood of moving in later life

Most older residents in the borough would prefer to remain in their current homes, valuing familiarity, community ties, and independence. However, around half of survey respondents expressed some level of interest in moving later in life if suitable, affordable, and attractive housing were available locally. Those aged 50–64 were most open to moving, while older age groups were more likely to move only following a change in health or life circumstances.

What encourages/influences older people to move in later life

The strongest motivators are smaller, more manageable homes, reduced running costs, good parking, and proximity to amenities/services. For some, cheaper energy-efficient homes are an incentive, especially given cost-of-living pressures. People were more likely to move if they perceived new homes as “future-proof” or lifestyle-enhancing rather than as a response to decline. Specialist housing such as retirement/sheltered or extra care housing can be attractive as long as it is modern, affordable, and framed positively. People still want to live in mixed-age communities even if they live in age-designated

accommodation. Early, positive conversations and visible, aspirational housing options encourage proactive decision making.

Preferences and priorities of a new home

Respondents prioritised independence, comfort, and safety. Two-bedroom homes were most popular, allowing space for visitors, carers, or hobbies. Bungalows and accessible ground-floor homes were preferred, though well-designed apartments were also acceptable. Location was crucial; being close to shops, public transport, and health services was more important than age-restricted or 'older people only' schemes. Many valued outdoor space and pet-friendly policies.

Barriers preventing people from moving/rightsizing in later life and how they can be overcome

Emotional attachment to home, financial uncertainty, and lack of local, suitable properties were the main barriers. Many associated 'downsizing' with loss, and the effort of decluttering or navigating the moving process felt overwhelming. Limited awareness of housing options and support services further discouraged moving. Overcoming these barriers requires better information, practical moving assistance, and reframing the narrative to present moving as a positive lifestyle choice.

Implications and recommendations

Based on the evidence, the report recommends that the Council:

1. Supports ageing in place

- Strengthen the provision of information and advice regarding the ways in which older people across all tenures can adapt their existing homes to make them more suitable for them in later life.
- Strengthen information and advice regarding the ways in which older people can access and pay for social care support at home should they need it.
- Promote and support opportunities for social connections in communities.
- Ensure that community infrastructure is 'age-friendly' and supports older people to be able to get out and about.

2. Diversify and improve housing choices

- Increase the range of housing options and tenures to attract a diverse range of older people to move into both mainstream and specialist housing in later life.
- Encourage the development of mainstream homes that are accessible by setting clear targets for accessible and adaptable homes in local planning documents.
- Expand the provision of a contemporary version of 'sheltered' housing that replicates the approach it is taking to develop Ty Darran.
- Expand the provision of extra care housing across the borough as an alternative to 'residential care'. Work with Registered Social Landlord (RSL) partners with a track record of providing good quality extra care housing in Wales to deliver extra care housing that provides good quality, accessible housing.
- Designated older persons' housing should be located within existing communities not on sites that are difficult to develop for other uses; in some cases, they can provide a hub for the local community.

- To attract older homeowners to move, new homes should be provided with at least two bedrooms. For older people that rent their homes from a social landlord, one-bedroom homes are also likely to attract social renters to move; to align with best practice, ‘1-bed-plus’ homes¹ should be considered.
- Integrate HAPPI (Housing our Ageing Population: Panel for Innovation)² design principles across all new build and refurbishments.

3. Review and modernise existing older persons’ housing stock

- Consider this research in relation to refurbishing Caerphilly Homes’ sheltered and age-designated housing, ensuring schemes are more attractive, affordable, and aspirational to older people. Encourage other RSLs to consider this research.
- When refurbishing existing schemes, apply HAPPI design principles wherever practical.
- Rebrand ‘sheltered housing’, as the term can deter potential residents; use more positive terms such as ‘Independent Living’ or ‘Retirement Housing’.
- Use this research to inform the review of age-designated housing, particularly for stock that is outdated or no longer fit for purpose.
- Strengthen the Council’s Accessible Housing Register to maintain a clear overview of which properties have accessibility features.

4. Strengthen financial and practical support

- Strengthen access to independent advice on housing and support options in later life to support people with decision making around moving to more suitable housing.
- Explore ways to financially support people to move, for example with the cost of moving.
- Consider how to support people with the practicalities of moving, such as decluttering the home.

5. Promote intergenerational, age-friendly communities

- Ensure developments are well-located, near transport, services, and social opportunities.
- Encourage mixed-tenure and mixed-age communities to avoid isolation.

6. Reframe the narrative on moving in later life

- Shift public messaging away from ‘downsizing’, focusing on moving as a lifestyle-enhancing choice rather than a last resort in a crisis.
- Use age-positive language and local ambassadors to share success stories.

¹ A one-bedroom apartment with flexible partitions that provide different layout configurations based on residents' requirements. For example, the adaptable ‘study space’ can be opened up to part of the lounge or removed altogether to create a larger bedroom.

² <https://www.housinglin.org.uk/Topics/browse/Design-building/HAPPI/>

1. Introduction

- 1.01 This is a research report by the Housing LIN (Learning and Improvement Network) for Caerphilly County Borough Council from a study into the factors that influence moving in later life amongst Caerphilly County Borough residents.
- 1.02 The study focused on people over the age of 50 across the borough to understand what matters to current and future older residents about the homes and communities they live in and how this population is likely to change.
- 1.03 The aim of the study is to provide a greater understanding of older persons' housing needs and inform the production of the second (2nd) Replacement Local Development Plan (2RLDP), which will set out the planning policy context for future development in the period up to 2035.
- 1.04 The study aimed to understand how to support people over the age of 50 to 'rightsize'. 'Rightsizing' is described as an older persons' active, positive choice to move home as a means of improving their quality of life. However, the research indicated that 'rightsizing' is a professionalised term and not widely understood by citizens, therefore the term 'moving' has been used in its place/interchangeably throughout this report.
- 1.05 The study explored the following themes:
 - Older people's interest in and likelihood of moving/rightsizing in later life
 - What encourages/influences people to rightsize/move
 - Preferences and priorities for a new home
 - Barriers preventing people from rightsizing/moving and how these can be overcome
- 1.06 The study involved a mixed-mode approach to the research and included:
 - A review of Welsh government policy
 - A review of existing national evidence on older people's housing and support preferences
 - A review of best practice examples of older persons' housing
 - Primary research with people in later life across the borough:
 - An online and paper survey that received 500 responses
 - Focus groups and interviews with people with lived experience and professional stakeholders
- 1.07 Based on the evidence from the demographic analysis, evidence review and primary research, the report provides recommendations/implications for the Council in relation to meeting the housing needs and preferences of older people in the borough and supporting people to move in later life.

2. Welsh government policy context

- 2.01 There are a range of policies and strategies in Wales that demonstrate how this research can be used to ensure the provision of appropriate and aspirational housing that promotes independent living for older people in Wales.

Better Homes for People in Wales: A National Housing Strategy for Wales (2010)³

- 2.02 Although now over 10 years old, this strategy sets out the Welsh Government's long-term vision that everyone in Wales should have access to good-quality, affordable, accessible housing and choice over how and where they live. The strategy underscores that housing is not merely about shelter but is foundational to health, wellbeing and social inclusion.
- 2.03 It includes policies explicitly targeting the needs of older people and people with disabilities, such as promoting lifetime homes, faster assessment of adaptations, and alignment of housing provision with health and social services. The document encourages local authorities to adopt strategic and evidence-based housing planning, to forge strong partnerships among housing, social care and health bodies (for example, via "Community Housing Agreements"), and to treat housing as a core component of community regeneration, inequality reduction, and better outcomes across sectors.
- 2.04 In relation to later living, this strategy provides a policy mandate for using housing interventions (adaptations, accessible design, supported housing) as preventive measures that can reduce or delay the need for formal care. By embedding housing quality, accessibility and cross-sector integration into the national housing framework, Better Homes reinforces that housing and social care must work hand in hand to support independence, reduce demand on services, and improve quality of life for older people in Wales.

The Wellbeing of Future Generations (Wales) Act 2015⁴

- 2.05 This Act provides the overarching framework for how public bodies in Wales plan and deliver services, making it directly relevant to later living and the relationship between housing and social care.
- 2.06 The Act places a legal duty on organisations such as local authorities and health boards to work towards seven national wellbeing goals, including creating a healthier, more equal Wales with cohesive communities. It also requires them to adopt long-term, preventive, and integrated approaches.
- 2.07 In practice, this means recognising housing as a key determinant of health and wellbeing, and ensuring that housing policy and social care provision are developed in tandem. Accessible, adaptable homes reduce demand for residential care and hospital services, while integrated models such as extra care housing illustrate how the two sectors can work together to support independence. By embedding prevention and collaboration into law, the Act positions suitable housing and responsive care not as isolated issues, but as essential, interconnected investments in the sustainability of services and the quality of life for older people in Wales.

³ https://www.housinglin.org.uk/_assets/Resources/Housing/Wales/Better_Homes_Wales.pdf

⁴ <https://www.gov.wales/well-being-of-future-generations-wales>

Welsh Government's Prosperity for All: The National Strategy (2017)⁵

- 2.08 The national strategy detailing the Welsh Government's key priorities recognises that 'good housing plays a critical role in healthy, independent ageing'.
- 2.09 In relation to older people, it states that Wales will build more purpose-built housing developments that would allow people to live independently within a protected and sheltered environment, located close to easily-accessible public transport.

Age friendly Wales: our strategy for an ageing society (2021)⁶

- 2.10 This is the main high-level strategy for Wales to respond to demographic ageing. It lays out a vision of an 'age friendly Wales that supports people to live and age well'.

Older Persons Commissioner for Wales: Commissioner's Strategy 2025-28⁷

- 2.11 The Older Persons Commissioner for Wales' priorities are focused on identifying opportunities to improve the support available to ensure older people can live safely and independently in their own homes.
- 2.12 This strategy seeks to enabling older people to live and stay well in their communities by ensuring that older people's experiences inform Welsh Government policy on preventative healthcare and are reflected in the delivery of front-line services.

Older people and people living with frailty: integrated quality statement (2024)⁸

- 2.13 This sets out what "good" looks like for health and social care for older people, especially those living with frailty. It emphasises helping people stay independent, connected to their community, having choice, and being able to live their later years in the place of their choosing.

The Housing Support Grant (HSG) Practice Guidance⁹

- 2.14 The Housing Support Grant (HSG) Programme is the policy and funding framework for delivering housing-related support to vulnerable people in different types of accommodation and across all tenures.
- 2.15 The HSG is an amalgamation of three existing grants; the Supporting People Programme Grant, the Homelessness Prevention Grant and the Rent Smart Wales Enforcement Grant.
- 2.16 The programme contributes to meeting the aims of 'Improving Lives and Communities - Homes in Wales', the National Housing Strategy and the ten-year Homelessness Plan, with a strong emphasis on the prevention of homelessness. It is also essential in assisting the local authorities to fulfil their duties under the Housing (Wales) Act 2014.
- 2.17 In accordance with the Welsh Government Guidance for the HSG, all local authorities are required to develop a three-year Local Delivery Plan for 2022-2025. Local authorities are required to review the delivery plan on an annual basis and update the priorities and spend plan, before submitting it to Welsh Government.

⁵ <https://wcva.cymru/wp-content/uploads/2020/01/Prosperity-for-all.pdf>

⁶ <https://www.gov.wales/age-friendly-wales-our-strategy-ageing-society-html>

⁷ <https://olderpeople.wales/commissioners-strategy-2025-28/>

⁸ <https://www.gov.wales/older-people-and-people-living-frailty-integrated-quality-statement-html>

⁹ <https://www.gov.wales/housing-support-grant-practice-guidance>

3. Evidence and best practice review

- 3.01 This section provides a review of national evidence and best practice examples that are relevant to understanding older people's interest in and the factors that will promote, influence and act as barriers to rightsizing/moving in later life.

Older people's interest in and likelihood of rightsizing/moving in later life

- 3.02 The review of national evidence indicates that very few people move home in later life. According to the 2018 Rightsizing: Reframing the housing offer for older people report¹⁰, 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.
- 3.03 This evidence on the limited number of older people moving home in later life is supported by research undertaken by the Housing LIN and Ipsos¹¹ in 2023 with c.6,000 older people (50+) in the UK. This research indicated that the likelihood of moving is low, with nine in ten saying they are unlikely or certain not to move in the next 12 months (90%), in 1 to 2 years (87%), or 3 to 5 years (74%). Moving intentions rise in the longer term, with three in ten (30%) saying they were certain or likely to move within the next 6 to 10 years, although more than half (58%) said they would be unlikely or certain not to move within this time period. The data indicates that most older people think that they are unlikely to move from their current home in the next 12-24 months, however, the likelihood to move increases over time.
- 3.04 The evidence review indicated that a sizeable proportion of older people would like to remain living in their existing homes in later life. The Housing LIN/Ipsos research¹² indicated that nearly half (47%) of older people (50+) said they would prefer to remain in their current home. Similarly, a report on rightsizing by Age Friendly Ireland¹³ highlighted that the majority of people would prefer to age in place with adaptations to their current homes.
- 3.05 Research published by the Ministry of Housing, Communities and Local Government (MHCLG)¹⁴ in 2024 also indicates that there is a preference amongst older people for remaining in their current home, with a strong desire to 'stay put' and 'age in place'. Although this is to an extent conditional upon the current home supporting their housing priorities (for example, independence and safety).
- 3.06 This evidence highlights the importance of balancing supporting people to remain living where they are whilst offering a mix of housing choices as alternative accommodation when they seek

¹⁰ Hammond, M., White, S., Walsh, S. (2018). Rightsizing: Reframing the housing offer for older people. Available at: <https://ageing-better.org.uk/sites/default/files/2019-02/rightsizing-manchester-school-architects.pdf>

¹¹ Housing LIN and Ipsos (2024). Older People's Housing Preferences. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/Support_materials/Reports/HLIN_Ipsos-Older-Peoples-Housing-Preferences_Report.pdf

¹² Ibid.

¹³ Age Friendly Ireland (2021). A Study on the Awareness, Perceptions and Experiences of Older People of Rightsizing. Available at: <https://agefriendlyireland.ie/wp-content/uploads/2021/06/AFI-Right-Sizing-Research-Report.pdf>

¹⁴ MHCLG (2024). What older people want research report. Available at: https://assets.publishing.service.gov.uk/media/673f1d09b3f0df6d2ebaf02d/What_older_people_want_research_report.pdf

to move. Indeed, a report from the Expert Group on Housing an Ageing Population in Wales¹⁵ states that whilst it is important to ensure that people feel supported to ‘stay put’, there is also a compelling case for ensuring that people have the choice to ‘move on’ to more suitable housing if they wish.

- 3.07 The Expert Group heard evidence to suggest that, in Wales, people aged 50+ are interested in moving to more suitable accommodation.¹⁶ This is supported by the Housing LIN/Ipsos research, which indicates that nearly 50% of older people would prefer to move, and of those, a sizable proportion would prefer to move to accommodation that has been designed to be accessible to older people from the outset, or another conventional home with adaptations.
- 3.08 Interestingly, only a minority of people in the Housing LIN/Ipsos survey would prefer to move to ‘specialist’ housing such as sheltered/retirement (10%) or extra care housing (4%). This finding is supported by evidence from the Rightsizing: Reframing the housing offer for older people report¹⁷ which indicates that only a small minority of moves made by older people are into specialist accommodation, even in the 70+ age cohort. Whilst this may in part be driven by a lack of specialist accommodation, the Housing LIN’s qualitative research with c.3,000 older people across the UK over the past 5 years tends to indicate a preference to move into other mainstream types of housing that are suited to ageing.

What encourages/influences older people to rightsize/move in later life?

- 3.09 The review of national evidence indicates that motivations for rightsizing/moving among older people are varied and multifaceted. While many older adults express a desire to remain in their current homes, several key factors have been shown to influence or encourage decisions to relocate.
- 3.10 The evidence suggests that 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.¹⁸
- 3.11 In particular, a large proportion of older people move to specialist housing as a result of a forced move or crisis rather than an active lifestyle choice. The King et al. (2021) study reported that many people first consider specialist housing options at a point of crisis, which can lead to decisions being rushed, or reliant upon help from family members to navigate the process.¹⁹

¹⁵ Welsh Gov (2013). Our Housing AGEnda: meeting the housing aspirations of older people. Available at: <https://www.housinglin.org.uk/Topics/type/Our-Housing-AGEnda-Meeting-the-aspirations-of-older-people-in-Wales/>

¹⁶ Ibid.

¹⁷ Hammond, M., White, S., Walsh, S. (2018). Rightsizing: Reframing the housing offer for older people. Available at: <https://ageing-better.org.uk/sites/default/files/2019-02/rightsizing-manchester-school-architects.pdf>

¹⁸ Ibid.

¹⁹ King et al. (2021). What older people want. Available at: https://assets.publishing.service.gov.uk/media/673f1d09b3f0df6d2ebaf02d/What_older_people_want_research_report.pdf

- 3.12 The report by the Expert Group on Housing an Ageing Population in Wales²⁰ considers that creating a climate where moving in later life becomes a realistic and positive choice could bring a range of benefits, not only for older people themselves but also by freeing up larger family-sized properties and by reducing demand on public services. Such a climate is largely dependent upon there being more attractive housing available locally which is better suited to the aspirations and interests of older people, encouraging people to move.
- 3.13 According to the evidence, in some instances, a desire to move to a smaller property can encourage/influence a move. The Housing LIN/Ipsos survey²¹ indicated that 40% of respondents stated moving to a smaller home would be an influencing factor if they were to move. However, the evidence also denotes that it is also important to recognise that moving to suitable housing does not necessarily mean smaller housing. A key finding in the Rightsizing: Reframing the housing offer for older people report²² is that the majority of older people who are moving across all tenures are not ‘downsizing’ and the majority of those that do move only reduce the size of their property by one room. The Gwent study indicated that there can be good reasons why older people prioritise space and spare bedrooms. This includes having family and friends to stay, having visiting support and storing health and medical equipment.²³
- 3.14 The Housing LIN’s research with c.3,000 older people across the UK in the last 5 years indicates that another factor influencing a move is the ability to reduce the amount of cleaning and maintenance of the home or garden. In some instances, this is about moving to a smaller home, but also this can be about moving to a newer property with less requirements for maintenance work. For some this is an attractive reason to move to retirement/sheltered housing or extra care housing, as this tends to be taken care of by the landlord.
- 3.15 The evidence suggests that a range of incentives may encourage/influence more older people to move to more suitable housing in later life. The report by the Expert Group on Housing an Ageing Population in Wales states that ‘if we want older people, wherever they live in Wales, to have a better choice of housing, then we will need more homes that are affordable, financial incentives that will address viability gaps in certain parts of Wales as well as independent financial information and advice’.²⁴
- 3.16 The Expert Group report provides a range of specific financial incentives that may encourage a move, such as providing tax relief incentives. For example, Stamp Duty Land Transaction Tax relief/exemption or council tax holidays for “last time buyers”, as well as a Help to Stay, Help

²⁰ Welsh Gov (2017). Our Housing AGenda: meeting the housing aspirations of older people. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/OtherOrganisation/170213-expert-group-final-report-eng.pdf

²¹ Housing LIN and Ipsos (2024). Older People’s Housing Preferences. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/Support_materials/Reports/HLIN_Ipsos-Older-Peoples-Housing-Preferences_Report.pdf

²² Hammond, M., White, S., Walsh, S. (2018). Rightsizing: Reframing the housing offer for older people. Available at: <https://ageing-better.org.uk/sites/default/files/2019-02/rightsizing-manchester-school-architects.pdf>

²³ Davies (2014). What older people want. Available at: https://assets.publishing.service.gov.uk/media/673f1d09b3f0df6d2ebaf02d/What_older_people_want_research_report.pdf

²⁴ Welsh Gov (2017). Our Housing AGenda: meeting the housing aspirations of older people. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/OtherOrganisation/170213-expert-group-final-report-eng.pdf

to Move Wales scheme. This provides comprehensive financial information including on trusted equity release options available, so that people can more easily fund their retirement, rightsize or adapt their home as their needs change.

- 3.17 A pilot study recently completed in North Wales and funded by the Intermediate Care Fund has also shown that providing bespoke services to support people through the journey of deciding whether to move can facilitate relocation to accommodation that suits their preferences.²⁵
- 3.18 The evidence also indicates financial factors influence an older person to rightsize/move. For example, the Housing LIN/Ipsos survey²⁶ found that 20% of respondents would be encouraged to move home if it meant they could move to a cheaper home, and other Housing LIN qualitative research across the UK has highlighted that reducing energy/running costs can encourage people to consider a move. Another study found that some older people like the idea of downsizing to pursue equity release in their current home.²⁷

Preferences and priorities of a new home

- 3.19 The evidence review highlights a wide range of preferences and priorities among older people when considering a new home. However, a consistent and overarching priority, as set out by the Older People's Housing Taskforce report,²⁸ is the desire for housing that supports people to live independently in safe and secure homes.
- 3.20 The evidence suggests that the majority of older people are seeking a home with two bedrooms. In the Gwent rightsizing study, the most frequently mentioned desirable feature for accommodation for older people in later life was a second bedroom.²⁹ This is supported by the Housing LIN/Ipsos survey³⁰ which found that 53% of respondents would prefer two bedrooms, with 31% preferring three bedrooms. There were some variations across demographic groups; those in the youngest age group (50-64) were more likely than average to expect to live in a larger property, while those aged 75+ were more likely to expect to live in a smaller, one-bedroom or two-bedroom property. Similarly, social and private renters were more likely to prefer a one-bedroom property.

²⁵ Hillcoat-Nallétamby, S. & Sardani, A. (2015). Qualitative Evaluation Report. The Moving On Service. Report commissioned by Canllaw, Porthmadog, with funding from the Intermediate Care Fund in https://www.housinglin.org.uk/_assets/Resources/Housing/OtherOrganisation/170213-expert-group-final-report-eng.pdf

²⁶ Housing LIN and Ipsos (2024). Older People's Housing Preferences. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/Support_materials/Reports/HLIN_Ipsos-Older-Peoples-Housing-Preferences_Report.pdf

²⁷ Price et al. (2014). What older people want research report. Available at: https://assets.publishing.service.gov.uk/media/673f1d09b3f0df6d2ebaf02d/What_older_people_want_research_report.pdf

²⁸ Older People's Housing Taskforce (2024). Our Future Homes: Housing that promotes wellbeing and community for an ageing population. Available at: <https://www.gov.uk/government/publications/the-older-peoples-housing-taskforce-report/our-future-homes-housing-that-promotes-wellbeing-and-community-for-an-ageing-population>

²⁹ Public Health Wales and Gwent Regional Partnership Board (2019). The APPROPRIATE and RIGHTSIZING study. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/OtherOrganisation/The-Appropriate-and-Rightsize-Study-Technical.pdf

³⁰ Housing LIN and Ipsos (2024). Older People's Housing Preferences. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/Support_materials/Reports/HLIN_Ipsos-Older-Peoples-Housing-Preferences_Report.pdf

- 3.21 In the section above on ‘Older people’s interest in and likelihood of rightsizing/moving in later life’, the evidence indicates that living in age-designated housing is not the preference of the majority of older people. Older people would either prefer to stay put or move to another conventional home that is better suited to their needs. The Housing LIN/Ipsos survey found that 29% of respondents would prefer to live with other residents in a community all of a similar age, and 53% would prefer to live in a mixed-age community. This is supported by the Gwent rightsizing study, which found that many older people don’t want to live in ‘old-aged ghettos’ but would prefer to live in mixed communities.³¹
- 3.22 The evidence suggests that there are some people for whom a move to specialist housing can be a preference. When considering the priorities/preferences for a specialist home, such as in retirement/sheltered or extra care housing, the evidence indicates that older people see a scheme manager as a vital component. Many of the people in the Gwent rightsizing study said they would like to have a warden linked to the scheme if they were to live in one. This view is strengthened by the APPG on Housing and Care for Older People inquiry report on regenerating sheltered housing, which recommends that ‘a service model in sheltered housing should cater for a diverse range of older people and be carefully crafted to balance the benefits of non-resident staff with an on-site presence along with the integration of technology to enhance resident contact, experience and support social interaction.’³²
- 3.23 Indeed, the Housing LIN’s qualitative research with c.3,000 older people over the past 5 years indicates that more older people potentially would be interested and willing to move to specialist housing, provided it is perceived to be a ‘lifestyle’ choice rather than a ‘support or care’-led choice; people are seeking good quality accommodation that enables them to live independently but doesn’t make them feel ‘old’.
- 3.24 Accessibility of a home is highlighted as being a priority for older people in relation to housing, both in specialist and conventional housing. The Housing LIN/Ipsos survey³³ found that older people (50+) identified adapting existing homes to be more accessible/age-friendly as important, as well as providing new accessible conventional homes. The report from the Expert Group on Housing an Ageing Population in Wales³⁴ is committed to designing projects to the Lifetime Homes Standards³⁵ and HAPPI³⁶ principles to reflect the preferences of an ageing population in Wales.

³¹ Public Health Wales and Gwent Regional Partnership Board (2019). The APPROPRIATE and RIGHTSIZING study. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/OtherOrganisation/The-Appropriate-and-Rightsize-Study-Technical.pdf

³² APPG Housing and Care for Older People (2024). Regeneration of Outdated Sheltered Housing. Available at: <https://www.housinglin.org.uk/Topics/browse/Housing/HousingforOlderPeople/ShelteredHousing/appg-inquiry-sheltered-housing-regen/>

³³ Housing LIN and Ipsos (2024). Older People’s Housing Preferences. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/Support_materials/Reports/HLIN_Ipsos-Older-Peoples-Housing-Preferences_Report.pdf

³⁴ Welsh Gov (2013). Our Housing AGenda: meeting the housing aspirations of older people. Available at: <https://www.housinglin.org.uk/Topics/type/Our-Housing-AGenda-Meeting-the-aspirations-of-older-people-in-Wales/>

³⁵ Lifetime Home Standards. Available at: <https://cae.org.uk/our-services/housing-services/lifetime-homes/>

³⁶ Housing LIN, HAPPI principles. Available at: <https://www.housinglin.org.uk/Topics/browse/Design-building/HAPPI/>

- 3.25 When considering the location of their housing preferences, older people frequently cite the social benefits that arise from a sense of community and belonging, access to social networks and being close to family and friends. Proximity to amenities, especially local shops and health services, and accessible transport routes, are also an important priority to fulfil cultural, religious and practical needs.³⁷
- 3.26 Most older people in the Gwent rightsizing study³⁸ wanted some type of outdoor space, but not all of them wanted to be responsible for a garden: some were happy with an outdoor communal sitting area or a balcony if they lived in an apartment.
- 3.27 Another priority for older people in relation to their home is being able to have pets. The Gwent rightsizing study³⁹ highlighted that animals have the potential to contribute significantly to our wellbeing and quality of life. This study found that not being able to take pets to sheltered housing can be a barrier to people moving in.
- 3.28 From the evidence, bungalows tend to be the preferred housing type amongst older people. The Aitken et al., 2022 study found that older people preferred bungalows to houses, and houses to flats.⁴⁰ This is supported by the Housing LIN/Ipsos survey which found that 41% of people would expect to move to a bungalow in later life.⁴¹ However, the Gwent rightsizing study indicated that whilst bungalows may be the overall preference, a flat would often serve people's requirements for an accessible home but they need to be attractive and aspirational enough to encourage a move.⁴²
- 3.29 The evidence in relation to people's preferred tenure for a new home indicates that people tend not to expect to shift tenures if they were to move home.⁴³ However, in relation to specialist housing, the 2024 Older People's Housing Taskforce report⁴⁴ suggests that a wider range of tenure options for older persons' housing could improve flexibility and affordability for consumers.

³⁷ MHCLG (2024). What older people want research report. Available at: https://assets.publishing.service.gov.uk/media/673f1d09b3f0df6d2ebaf02d/What_older_people_want_research_report.pdf

³⁸ Public Health Wales and Gwent Regional Partnership Board (2019). The APPROPRIATE and RIGHTSIZING study. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/OtherOrganisation/The-Appropriate-and-Rightsize-Study-Technical.pdf

³⁹ Ibid.

⁴⁰ Aitken et al. (2022). What older people want research report. Available at: https://assets.publishing.service.gov.uk/media/673f1d09b3f0df6d2ebaf02d/What_older_people_want_research_report.pdf

⁴¹ Housing LIN and Ipsos (2024). Older People's Housing Preferences. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/Support_materials/Reports/HLIN_Ipsos-Older-Peoples-Housing-Preferences_Report.pdf

⁴² Public Health Wales and Gwent Regional Partnership Board (2019). The APPROPRIATE and RIGHTSIZING study. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/OtherOrganisation/The-Appropriate-and-Rightsize-Study-Technical.pdf

⁴³ Housing LIN and Ipsos (2024). Older People's Housing Preferences. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/Support_materials/Reports/HLIN_Ipsos-Older-Peoples-Housing-Preferences_Report.pdf

⁴⁴ Older People's Housing Taskforce (2024). Our Future Homes: Housing that promotes wellbeing and community for an ageing population. Available at: <https://www.gov.uk/government/publications/the-older-peoples-housing-taskforce-report/our-future-homes-housing-that-promotes-wellbeing-and-community-for-an-ageing-population>

Barriers preventing people from rightsizing/moving in later life

- 3.30 The review of evidence indicates that there are a variety of cross-cutting barriers that prevent people from rightsizing/moving in later life.
- 3.31 The evidence suggests that there are several emotional barriers to rightsizing/moving in later life. The Gwent rightsizing study⁴⁵ indicated that people are emotionally attached to their home. It highlighted that people are not only emotionally attached to the bricks and mortar but their possessions, and the local area/community that they live in. As a result, the upheaval of moving can be a barrier to many people. Indeed, the Housing LIN/Ipsos research⁴⁶ highlighted that the vast majority of older people have been living in their existing homes for more than 20 years and 26% said that personal attachments to their current home are a barrier to moving.
- 3.32 The report by the Expert Group on Housing an Ageing Population in Wales⁴⁷ indicated that another barrier is a lack of awareness of housing options, combined with a lack of suitable properties in the locality. From the Housing LIN/Ipsos survey, older people expressed that a lack of suitable properties (19%) was more of a barrier to rightsizing/moving than a lack of awareness of housing options (4%). At a more local level, the Gwent rightsizing study⁴⁸ indicated that people are seeking better information and advice about their housing and support options so they can make more informed choices about where they live in later life.
- 3.33 The evidence on the lack of suitable properties acting as a barrier is also highlighted in the Rightsizing: Reframing the housing offer for older people report⁴⁹ which suggests that 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.
- 3.34 In the Age Friendly Ireland rightsizing report⁵⁰, all participants said there was a lack of suitable accommodation in their local areas. In addition, a number of people had concerns about the financial viability of moving, as what they might get for the sale of their home would not necessarily buy them a smaller property in their local area. In the Housing LIN/Ipsos survey,

⁴⁵ Public Health Wales and Gwent Regional Partnership Board (2019). The APPROPRIATE and RIGHTSIZING study. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/OtherOrganisation/The-Appropriate-and-Rightsize-Study-Technical.pdf

⁴⁶ Housing LIN and Ipsos (2024). Older People's Housing Preferences. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/Support_materials/Reports/HLIN_Ipsos-Older-Peoples-Housing-Preferences_Report.pdf

⁴⁷ Welsh gov (2017). Our Housing AGenda: meeting the aspirations of older people in Wales. Available at: <https://www.housinglin.org.uk/Topics/type/Our-Housing-AGenda-Meeting-the-aspirations-of-older-people-in-Wales/>

⁴⁸ Public Health Wales and Gwent Regional Partnership Board (2019). The APPROPRIATE and RIGHTSIZING study. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/OtherOrganisation/The-Appropriate-and-Rightsize-Study-Technical.pdf

⁴⁹ Hammond, M., White, S., Walsh, S. (2018). Rightsizing: Reframing the housing offer for older people. Available at: <https://ageing-better.org.uk/sites/default/files/2019-02/rightsizing-manchester-school-architects.pdf>

⁵⁰ Age Friendly Ireland (2021). A Study on the Awareness, Perceptions and Experiences of Older People of Rightsizing. Available at: <https://agefriendlyireland.ie/wp-content/uploads/2021/06/AFI-Right-Sizing-Research-Report.pdf>

20% of people stated that the cost of moving is a barrier and 20% also said that not being able to afford a different home was a barrier.

- 3.35 The evidence review has also therefore shone a light on a variety of financial barriers. The report by the Expert Group on Housing an Ageing Population in Wales⁵¹ indicated that older people will often face financial barriers preventing them from moving. This is supported by research from Shakespeare Martineau⁵² which suggests that the majority of people believe that rightsizing to a home that better suits their needs is 'unaffordable'. This report highlighted that around 1 in 5 pensioners were already living in poverty prior to the cost of living crisis in 2019/2020, which has an impact on the housing choices available to them.
- 3.36 An important barrier to rightsizing/moving to consider, identified through the Gwent study,⁵³ are the negative connotations of and perception of 'downsizing'. The views regarding 'downsizing' in this study are best expressed by the following quotes:
- Dostana Group, Man 73: *"Downsizing what down into the ground when you are dead? - that's the only type of downsizing I want to do."*
 - Dostana Group, Man 76: *"Oh dear, downsizing that sounds so negative - it hardly encourages you to think about it in a positive way does it."*
 - Gwent Dermatological Group Member, Woman 65: *"I actually think the name (downsizing) makes people feel sad - it's like they do not need anything anymore as they are not important anymore."*
- 3.37 The Rightsizing: Reframing the housing offer for older people report⁵⁴ suggests that 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. Whilst the Housing LIN recognises the importance of creating a diverse range of options, it is the Housing LIN's experience that many older people are not familiar with or do not understand the term 'rightsizing' and this too can be a barrier to some people.
- 3.38 An important consideration that prevents people from rightsizing/moving in later life is that many people say, *'it's not for them: it's something sensible for other older people to do'*.⁵⁵ The Housing LIN's qualitative research with older people over the past 5 years indicates that most people think that moving somewhere more suitable in later life is a good idea for other people to do. This highlights a potential perception gap about what it means to move in later life and a

⁵¹ Welsh gov (2017). Our Housing AGenda: meeting the aspirations of older people in Wales. Available at: <https://www.housinglin.org.uk/Topics/type/Our-Housing-AGenda-Meeting-the-aspirations-of-older-people-in-Wales/>

⁵² Shakespeare Martineau (2023). Moving on: Could later living be the answer to the housing crisis? Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/OtherOrganisation/0427-Moving-On-paper-report-SHMA-FINAL.pdf

⁵³ Public Health Wales and Gwent Regional Partnership Board (2019). The APPROPRIATE and RIGHTSIZING study. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/OtherOrganisation/The-Appropriate-and-Rightsize-Study-Technical.pdf

⁵⁴ Hammond, M., White, S., Walsh, S. (2018). Rightsizing: Reframing the housing offer for older people. Available at: <https://ageing-better.org.uk/sites/default/files/2019-02/rightsizing-manchester-school-architects.pdf>

⁵⁵ Public Health Wales and Gwent Regional Partnership Board (2019). The APPROPRIATE and RIGHTSIZING study. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/OtherOrganisation/The-Appropriate-and-Rightsize-Study-Technical.pdf

need to change the narrative from something that is done in a crisis to a more active and attractive lifestyle choice.

Good practice in relation to rightsizing: How other social landlords have overcome barriers to rightsizing

New build ‘rightsizer’ accommodation

- 3.39 A number of social landlords have been developing a contemporary version of sheltered housing, which is intended to increase the range of housing options available to older people. Several social landlords are providing attractive and aspirational homes that follow HAPPI⁵⁶ design principles and are focused on providing ‘care-ready’ accommodation to support people to move into more suitable homes in later life.
- 3.40 ‘Care-ready’ housing typically means that a home is capable of adaptation over time to meet changing needs. ‘Care-ready’ retirement housing means that homes are built suited to possible future requirements, such as space for aids and adaptations, storage for mobility scooters, space to retain independence and technology that supports independence.
- 3.41 The examples below are mainly from local authorities that have taken a more active role in delivering new build accommodation for older people.

Community Living, Cardiff City Council

- 3.42 As part of Cardiff City Council’s Ageing Well Programme, the Council is seeking to improve housing options for older people and the Council is developing new homes for older persons in the city, consisting of 11 new ‘Community Living’ schemes providing 574 apartments by March 2028. The Council’s programme for developing new older persons’ accommodation at scale is ambitious, and in the context of an absence of many similar schemes in the UK, visionary.
- 3.43 Across the 11 ‘Community Living’ schemes the Council is providing a range of housing typologies, from housing with care, care-ready housing and intergenerational housing to a wellbeing village. These are intended to be aligned to the HAPPI⁵⁷ design principles and have the following features:
- Adaptable, accessible, care-ready flats
 - Remove the need for future adaptations
 - Large, level access showers
 - Open plan living-dining
 - Increased storage
 - Affordable to heat

⁵⁶ Housing LIN, HAPPI principles. Available at: <https://www.housinglin.org.uk/Topics/browse/Design-building/HAPPI/>

⁵⁷ Ibid.

- Access to private outdoor space
- Communal facilities
- Provide a hub of services for older people in the locality

- 3.44 The intention is for 'Community Living' schemes to deliver high quality homes for older persons that will enable people to 'age in place' and to be supported as necessary to maintain an active, independent life.
- 3.45 The appropriate use of 'Community Living' schemes is also intended to help the Council to address the demands of an increasing older population, reducing the reliance on general residential care and freeing up family homes to address the housing shortage in the city.



Appleby Blue, United St Saviours

- 3.46 Appleby Blue is an innovative social housing development from United St Saviour's Charity (UStSC) that reimagines the almshouse concept for contemporary, inner-city living.
- 3.47 The development was completed in May 2023, and provides 57 homes for a total of 63 residents aged 65 or over in Southwark. Designed by Stirling Prize-winning architects, Witherford Watson Mann, the building provides a blueprint for future adult social housing projects for older persons. The building is designed to connect residents through its porous nature and welcoming floorplan, cultivating a strong sense of community and reducing loneliness.
- 3.48 The Appleby Blue community kitchen sits at the heart of the building, with UStSC running culinary based community projects with local organisations to foster intergenerational connectivity in Southwark and provide important upskilling opportunities for young people in the borough.
- 3.49 Appleby Blue occupies a site previously occupied by a care home, which had fallen into disrepair and was no longer fit for purpose. It is the off-site social housing provision funded by a private residential development, 'Triptych', developed by JTRE in neighbouring Bankside. The development has been made possible through a partnership between the freeholders, London Borough of Southwark, and UStSC, who lease it and will manage it in perpetuity.
- 3.50 35% of the energy required to run Appleby Blue almshouse in Bermondsey is generated on site from photovoltaics on the roof. The building is passively ventilated, with common areas equipped with an automated system of opening vents.



Grants Hill Court, Wealden District Council

- 3.51 Grants Hill Court is a retirement housing scheme comprising 65 affordable apartments and two cottages that provides independent living in an enabling environment. It brings together a new and an established community, aimed at people seeking to 'rightsize' in their later years.
- 3.52 The dwellings exceed category M4(2)⁵⁸ and are 'care-ready' to enable residents to age in place within their community. Designed to respond to the recommendations of the HAPPI⁵⁹ reports, dual aspect accommodation is promoted throughout, with the building orientated to maximise daylight and sunlight into the dwellings. By utilising open access walkways within the eastern activity courtyard, apartments benefit from real external front doors and openable windows allowing cross ventilation through the apartments.



Bruyn's Court, Thurrock Council

- 3.53 This scheme heralds the beginning of a major new programme to transform the housing offer for older residents in Thurrock. The programme will produce a range of housing choices,

⁵⁸ Building Regulations Part M (Access to and Use of Buildings) — specifically Approved Document M, Volume 2: Accessible and adaptable dwellings. Suitable for older people and some wheelchair users; includes step-free access, wider doorways, accessible bathrooms, and adaptability for future needs.

⁵⁹ Housing LIN, HAPPI principles. Available at: <https://www.housinglin.org.uk/Topics/browse/Design-building/HAPPI/>

designed in line with the recommendations of the Housing our Ageing Population: Panel for Innovation (HAPPI) report⁶⁰, to promote health, wellbeing and independent living for people with a range of different needs and aspirations.

- 3.54 This development comprises twenty five light, spacious flats designed specifically to be flexible enough to meet the different needs of older residents so that they do not need to move house as their needs change, thereby fostering a strong, stable community.
- 3.55 The building has been carefully designed to provide residents with outstanding homes with excellent daylight, natural ventilation and views. Particular consideration has been given to the importance of social interaction. A communal garden room and terrace are provided on the ground floor, whilst informal sitting areas on each of the upper floors animate the corridors and provide opportunities for casual interaction. The building gives on to a newly landscaped garden shared with the neighbouring community.
- 3.56 The scheme does not provide care and support services, but the aim of the scheme is to radically improve the standard of living for older people in Thurrock, taking account of their social and physical needs, and encouraging social interaction and mutual support.



Melfield Gardens, Phoenix Community Housing

- 3.57 Phoenix Community Housing is a resident-owned and led Community Gateway Housing Association. Phoenix's approach to attracting older people to move to more suitable accommodation is focused on providing high quality accommodation that encourages people to think about a new home. They identified that 714 of their family homes were occupied by 1 person but the learning from their extra care scheme indicated that for someone to consider moving, the housing offer needs to exceed their expectations. The properties have been designed to HAPPI design principles and are Passivhaus standard which means the running costs are minimal.
- 3.58 Melfield Gardens is the UK's first intentional intergenerational housing scheme. It provides 30 '1bed-plus' flats for 'under-occupiers' aged 55+ and two four-bedroom flats for Goldsmiths students. The Goldsmiths students provide informal support to residents for a reduced rent.
- 3.59 Phoenix Community Housing's letting policy for the scheme focuses on and prioritises 'under-occupiers' following conversations with Lewisham Borough Council.

⁶⁰ <https://www.housinglin.org.uk/Topics/browse/Design-building/HAPPI/>

- 3.60 They use the phrase ‘chain-lettings’ approach as the number of potential chain lettings from building the scheme is 51 homes, making available 51 homes within their family-sized housing stock.



Refurbished ‘rightsizer’ accommodation

- 3.61 In the social housing sector, the majority of ‘retirement housing’ consists of dated sheltered housing stock. Many social landlords are starting to address the fitness for purpose and future viability of this stock, much of which was developed in the 1970s/80s and is not consistent with modern standards i.e. HAPPI or TAPPI⁶¹. Most providers are relinquishing the ‘sheltered’ terminology in favour of more age-positive terminology, e.g. Retirement Housing, Independent Living, Later Living.
- 3.62 A number of social housing providers have embarked on remodelling/redevelopment programmes, which have modernised their sheltered schemes and created more accessible homes. These have been relatively cost-effective ways of revitalising schemes, although it is not always possible to reach modern accessibility standards.
- 3.63 To demonstrate what some local authorities have achieved with refurbishment/renovation, some examples have been provided below.

Wrexham Borough Council

- 3.64 Wrexham Borough Council has embarked on an ambitious Sheltered Housing Remodelling and Refurbishment Programme, which has involved the remodelling and refurbishment of two sheltered housing schemes at Llys y Mynydd, Rhos and Tir y Capel, Llay, and complementary new build apartments to the rear of the existing scheme at Llay.
- 3.65 The new assisted living apartments are designed to be ‘care-ready’, with the latest technology improving health and wellbeing. The council aims to help older people remain independent in their own home for longer by investing in the upgrades.
- 3.66 The main works to be carried out include: remodelling the existing layout to increase the sizes of the flats, providing good storage facilities within the flats, refurbishing the communal

⁶¹ Housing LIN. Technology for our Ageing Population: Panel for Innovation. Available at: <https://www.housinglin.org.uk/Topics/browse/Design-building/tappi/>

lounges, improving the energy efficiency of the scheme, including the provision of 2 EV chargers and increasing the car parking provision around the schemes.



Vic Johnson House, Gateway Housing Association

- 3.67 The regeneration of Vic Johnson House, located in Mile End, created 32 new apartments and refurbished 24 existing apartments in an effort to improve the housing choices available to older people in Tower Hamlets.
- 3.68 Feasibility appraisals identified opportunities to extend the retained building at both ends, with one of the principal objectives being to relocate the main entrance closer to the amenities on the Roman Road and in doing so improve the access for residents.
- 3.69 The entrance now includes a new communal hub for residents to interact socially, linking these areas with a south facing and regenerated communal garden. The decision to retain the majority of the existing building and retain residents in situ during construction provided significant challenges for the design team and construction process but was a strong sustainability option and on a social value level, allowed residents to stay in their homes.



Marketing and supporting people to ‘rightsized’

- 3.70 The national research and Housing LIN’s experience from qualitative research with older people indicate that the majority of people are not looking to move in later life, and if they do move, it isn’t always to a smaller home. In response, the term ‘rightsizing’ is being used by the

sector as a more realistic and relatable term to ‘downsizing’, which implies that people move to smaller properties in later life.

- 3.71 However, the extent to which the term ‘rightsizing’ is understood by the public is debateable, it tends to be more understood and used by a professional audience. The research undertaken across the borough supports this: most people are not aware of the term ‘rightsizing’, hence ‘moving’ has been used throughout this report. As such there are a range of approaches to marketing rightsizing, some providers use the term whereas others don’t.

Healthy Age Friendly Homes, Age Friendly Ireland

- 3.72 The Healthy Age Friendly Homes Programme⁶², implemented by Age Friendly Ireland in partnership with Sláintecare, supports older people to rightsize, helping them find or adapt homes suited to their changing needs as they age.
- 3.73 Through this programme, local coordinators assess each participant’s needs and connect them with resources for home modifications, energy efficiency improvements, and other supports. If a current home no longer meets a person’s mobility or health needs, coordinators provide guidance on moving to more suitable housing within their community.
- 3.74 The coordinators meet people face to face to understand their needs and explore rightsizing options. They work to support individuals with the practicalities of moving as well as understanding the housing options available and linking in with the housing allocations department at the council.

Mosscares St Vincent’s Rightsizing Approach

- 3.75 Mosscares St Vincent’s Housing (MSV) Group own and manage almost 9,000 homes in Greater Manchester, Lancashire and West Yorkshire. MSV emphasises a supportive approach to rightsizing, helping older adults transition to homes that better match their lifestyle needs and personal circumstances.
- 3.76 Rightsizing with MSV is framed as an empowering choice for independence and improved quality of life. It not only helps older residents access manageable, affordable housing, but also frees up larger homes for families in need, thus addressing the broader housing crisis in the UK.
- 3.77 Key components of MSV’s approach include personalised support services like the Helping Hands Service, which assists with the emotional and logistical challenges of downsizing. This service helps clients sort, declutter, and prepare for the move, with additional assistance for utility setup and address changes.
- 3.78 For clients needing specialised accessibility, MSV’s housing includes adaptations to meet health and mobility needs, ensuring that new homes provide comfort and safety.

⁶² Age Friendly Homes, funded by Sláintecare (2021) Healthy Age Friendly Homes Programme. Available at: <https://agefriendlyhomes.ie/resources/healthy-age-friendly-homes-programme/>

- 3.79 MSV have designed an attractive rightsizing brochure that provides information and advice on rightsizing with MSV and details of the services available to support people.⁶³ They have also provided a rightsizing video.⁶⁴

ExtraCare Charitable Trust's Marketing Approach

- 3.80 The ExtraCare Charitable Trust (ECCT) are one of the largest providers of extra care housing in England. Their approach to marketing is focused on positioning a move to extra care housing as a lifestyle choice. The brochures⁶⁵ designed by ECCT use age-positive imagery and terminology as well as providing clear information about what is on offer in a scheme, including a visually attractive 3D floor plan and images of apartments and communal areas.
- 3.81 The ECCT is also upfront about the cost of living in an ECCT apartment, including details of charges to expect and the different ways people can pay to live in extra care. Providing case studies helps people consider the financial benefits that could come from moving.

St Monica Trust's Marketing Approach

- 3.82 St Monica Trust (SMT) are a provider of retirement villages, with a strong marketing strategy that is focused on creating a customer-orientated culture. SMT recognise that people don't buy assisted living or extra care housing. They buy peace of mind, a reduction in loss of independence, the chance to maximise their enjoyment of life for longer, the opportunity to live with like-minded people and the avoidance of becoming a burden on their children. It is these benefits that are marketed to customers.
- 3.83 St Monica Trust's marketing approach recognises that marketing is not restricted to advertising or PR or communications. It is a cycle of activity that when integrated within the DNA of an organisation can usefully inform the analysis, planning and implementation of an organisation's strategy and objectives. SMT's values underpin the organisation and as such are a quality that customers buy into.
- 3.84 SMT also see value in developing a word-of-mouth recommendation network to add credibility, which they achieve by asking residents to talk to individuals who are starting the moving process and provide personal testimonials. Having satisfied staff is also important to word-of-mouth. Residents, families and staff act as positive ambassadors for the organisation.
- 3.85 SMT's customer-orientated focus seeks to see the world from their customers' point of view by understanding who their customers are and what are their wants and wishes.

⁶³ MSV (2021). Have you thought about Rightsizing? Available at:

<https://www.housinglin.org.uk/Topics/type/Rightsizing-Later-Living-and-HAPPI-Schemes/>

⁶⁴ MSV, Snugbug. Rightsizing video. Available at:

<https://vimeo.com/cdandpmedia/review/534802437/6bc5654364>

⁶⁵ ExtraCare Charitable Trust (2024). Discover later living. Available at:

<https://www.extracare.org.uk/app/uploads/2024/01/Discover-Later-Living-Brochure-Jan-2024.pdf>

Summary of evidence and best practice: Implications for Caerphilly County Borough Council

- 3.86 The national evidence on older people's interest in and the factors that will promote, influence and act as barriers to rightsizing/moving in later life and good practice suggests that CCBC needs to consider the following:

Support ageing in place

- 3.87 Enable older residents to remain in their current homes for as long as possible by improving access to adaptations, home maintenance services, social support, and care provision. Independence should be the foundation of all housing-related interventions.

Expand and diversify housing options

- 3.88 Promote the development of a broader range of housing choices that are attractive, accessible and affordable to older people. This includes both specialist accommodation and well-designed conventional housing that meets the needs of an ageing population.

Provide housing that attracts a range of older adults

- 3.89 Encourage a mix of housing types and sizes to reflect the diversity of older people's circumstances and preferences. Flexible, inclusive design will widen appeal.

Prioritise appropriately sized homes

- 3.90 Ensure new housing for older people offers at least two bedrooms as standard to meet space and lifestyle needs, while also exploring '1-bed-plus' models where suitable.

Offer incentives and financial support

- 3.91 Improve access to financial assistance and personalised advice to make moving a more viable and attractive option for older people.

Promote mixed-age, inclusive communities

- 3.92 Support the development of communities that encourage intergenerational interaction and reduce the risk of social isolation, including in specialist housing settings.

Adopt and apply HAPPI principles

- 3.93 All homes designated for older people—new and existing—should follow the HAPPI (Housing our Ageing Population: Panel for Innovation) design principles to ensure quality, safety, and wellbeing.

Ensure homes are in a good location

- 3.94 Prioritise the location of housing near reliable, accessible public transport to support mobility, independence and community engagement.

Diversify tenure options

- 3.95 Encourage a range of tenure types, including ownership, shared ownership, and affordable rental, and work with communities to define what "affordable" means locally.

Provide practical moving support

- 3.96 Offer practical help with the moving process, including decluttering and logistical support, to reduce the emotional and physical barriers to relocation.

Strengthen access to independent advice

- 3.97 Ensure that older people have access to clear, impartial information and guidance about housing and support options, enabling informed, confident decision making.

Reframe the narrative around moving in later life

- 3.98 Promote moving as a proactive, lifestyle-enhancing choice rather than a last resort. Language and messaging should focus on wellbeing, independence, and living well at home.

4. Demographic profile and housing circumstances of the older population in Caerphilly County Borough

- 4.01 This section of the report provides a demographic analysis of the current and future older population in Caerphilly County Borough. It also provides an overview of the existing supply of older persons' accommodation (retirement/sheltering housing, age-designated housing and extra care housing) in the borough as well as data on adaptations to older residents' current homes.

Demographic profile of older people (50+)

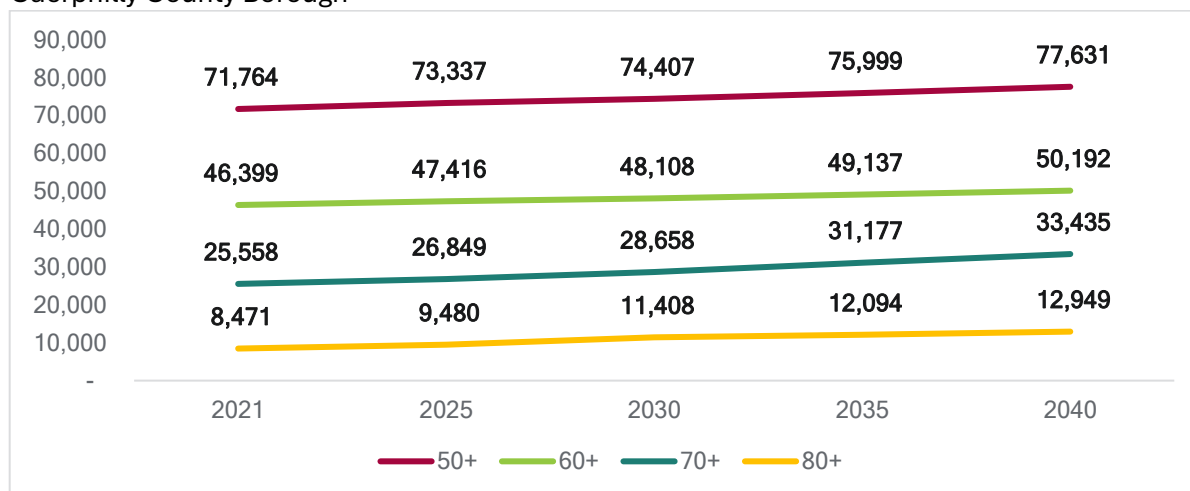
Population projections

- 4.02 To establish the current older population in Caerphilly County Borough, the ONS 2021 census⁶⁶ has been used as baseline which identifies the number of people at ages 50+, 60+, 70+ and 80+.
- 4.03 To estimate the population projections of the number of people aged 50+, 60+, 70+ and 80+, the most recent 2018-based local authority population projections for Wales, 2018 to 2043⁶⁷ growth rates data (see Table 18 in Annexe) has been applied to the ONS 2021 census for the years 2025, 2030, 2035 and 2040.
- 4.04 This indicates that between 2025 and 2040, the number of people aged 50+ will increase by 6%. This means an additional 4,382 people in this age range by 2040. The number of people aged 60+ will increase by 10%, this means an additional 5,050 people by 2040.
- 4.05 The 70+ and 80+ populations will see the biggest increase, with an increase of 25% between 2025 and 2040 in the 70+ population and 37% between 2025 and 2040 in the 80+ population.

⁶⁶ ONS Census 2021. Available at <https://www.ons.gov.uk/>

⁶⁷ 2018-based local authority population projections for Wales, 2018 to 2043. Available at <https://statswales.gov.wales/Catalogue/Population-and-Migration/Population/Projections/Local-Authority/2018-based/populationprojections-by-localauthority-year>

Figure 1. Estimated population of the number of people aged 50+, 60+, 70+, and 80+ in Caerphilly County Borough

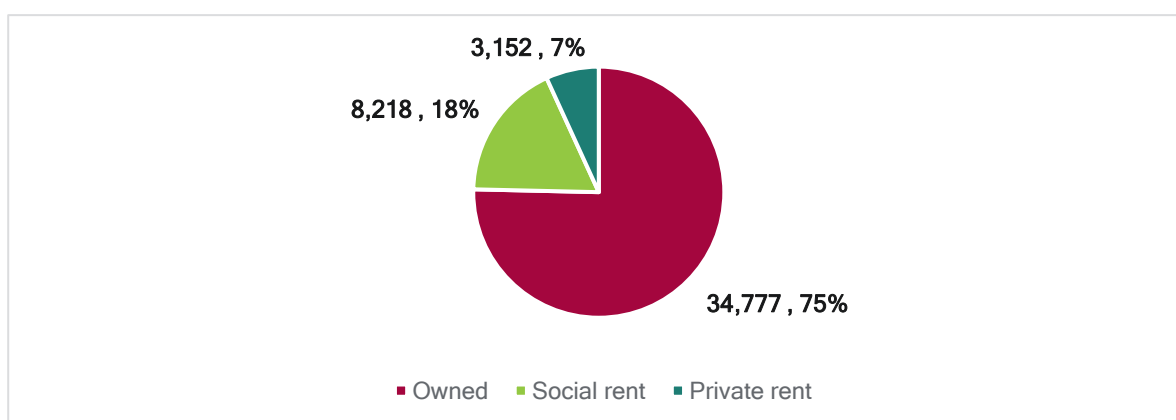


Source: ONS Census 2021, 2018 local authority population projections for Wales

Tenure and deprivation

- 4.06 The majority of 50+ households in Caerphilly County Borough are owned (75%) with 25% rented, of which 18% are rented from a social landlord and 7% rented from a private landlord.

Figure 2. Tenure profile of 50+ households in Caerphilly County Borough



Source: ONS Census 2021

- 4.07 The tenure profile of people aged 50+ in Caerphilly County Borough shows a steady increase in home ownership with age. Among the 50+ population, 75% are homeowners, rising slightly to 76% for those aged 60+ and 78% for the 70+ group.
- 4.08 The proportion of people aged 50+ living in social rented housing remains consistent at 18%. Although slightly fewer people aged 45-49 rent from a social landlord.
- 4.09 Private renting, on the other hand, declines notably with age. While 7% of people aged 50+ live in private rented accommodation, this falls to 5% among the 60+ group and just 4% for those aged 70 and over.
- 4.10 The data on tenure indicates that the younger age cohorts are less likely to be homeowners than the older age cohorts and more likely to rent from a private landlord. This suggests that younger people, particularly those aged 45-49 now, may be less likely to be homeowners in the future and will rely more heavily on rental options in later life.

Table 1. Tenure profile of the different age cohorts in Caerphilly County Borough

Age cohort	Owned	Social rent	Private rent	Total
45-49	68%	17%	14%	100%
50+	75%	18%	7%	100%
60+	76%	18%	5%	100%
70+	78%	18%	4%	100%

Source: ONS Census 2021 N.B the data on households aged 80+ is not available

- 4.11 The Welsh Index of Multiple Deprivation⁶⁸ (WIMD) is the Welsh Government's official measure of relative poverty. It identifies those communities, at a Lower Super Output Area (LSOA) geography, with the highest concentrations of different types of deprivation, plus overall deprivation. WIMD ranks all LSOAs in Wales from the most (rank 1) to the least (rank 1909) deprived. The table below shows how the ranking is categorised.

Table 2. WIMD Rank Bands and Deprivation Categories

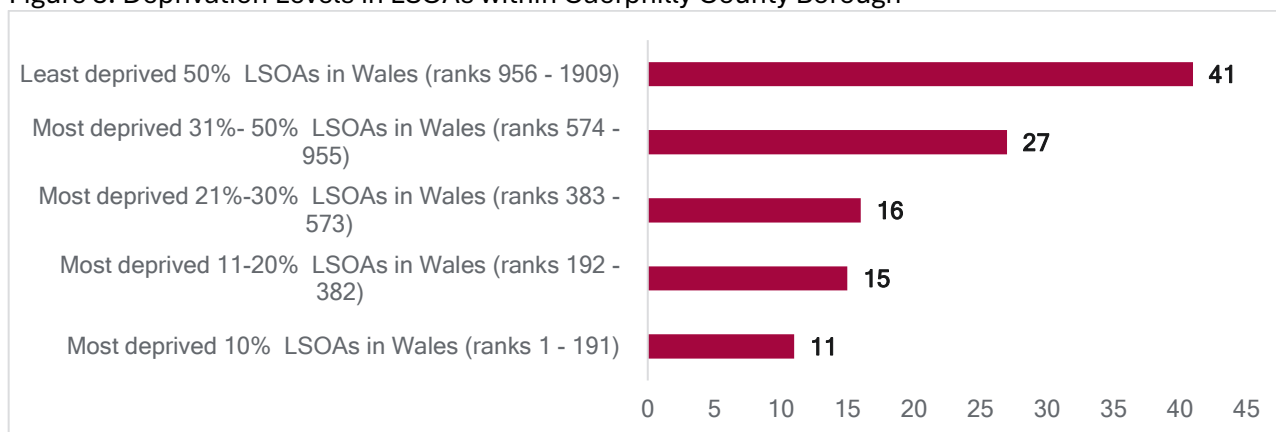
WIMD Rank Range for LSOAs	Deprivation Category
1–191	10% most deprived
192–382	11–20% most deprived
383–573	21–30% most deprived
574–955	31–50% most deprived
956–1909	50% least deprived

Source: Welsh Index of Multiple Deprivation, Statswales

- 4.12 Caerphilly County Borough has 110 LSOAs out of the 1909 LSOAs in Wales. According to the WIMD ranking, 37% of Caerphilly County Borough's LSOAs are ranked among the least deprived 50% in Wales.
- 4.13 Notably, 25% of Caerphilly County Borough's LSOAs fall within the 31% to 50% most deprived in Wales, 14% of LSOAs fall within the 11% to 20% most deprived in Wales, and 10% of LSOAs within the most deprived 10% in Wales. This highlights a significant concentration of deprivation in parts of the county.

⁶⁸ <https://statswales.gov.wales/Catalogue/Community-Safety-and-Social-Inclusion/Welsh-Index-of-Multiple-Deprivation>

Figure 3. Deprivation Levels in LSOAs within Caerphilly County Borough



Source: WIMD, StatsWales

4.14 The community areas with the largest number of LSOAs with the highest level of deprivation (10% most deprived in Wales) are Upper Rhymney Valley (6 LSOAs), Caerphilly Basin (4 LSOAs), and Mid Valleys West (1 LSOA). However, Caerphilly Basin and Mid Valleys West also have a number of LSOAs with lower levels of deprivation (50% least deprived in Wales). The table below shows the deprivation levels across all 110 LSOAs in Caerphilly County Borough.

Table 3. WIMD ranks and deprivation level of LSOAs in Caerphilly County Borough

Community Area	LSOA	WIMD rank	Deprivation Category
Upper Rhymney Valley	Darran Valley 2	137	10% most deprived
Caerphilly Basin	St. James 4	113	10% most deprived
Caerphilly Basin	St. James 3	3	10% most deprived
Caerphilly Basin	Penyrheol 8	90	10% most deprived
Mid Valleys West	Hengoed 2	123	10% most deprived
Upper Rhymney Valley	Aberbargoed 2	177	10% most deprived
Upper Rhymney Valley	Bargoed 4	29	10% most deprived
Caerphilly Basin	Bedwas Trethomas and Machen 6	43	10% most deprived
Upper Rhymney Valley	Moriah 3	67	10% most deprived
Upper Rhymney Valley	Twyn Carno 1	8	10% most deprived
Upper Rhymney Valley	New Tredegar 3	59	10% most deprived
Mid Valleys West	St. Cattwg 5	325	11%-20% most deprived
Caerphilly Basin	Morgan Jones 2	237	11%-20% most deprived
Caerphilly Basin	Aber Valley 4	358	11%-20% most deprived
Caerphilly Basin	Aber Valley 3	340	11%-20% most deprived
Caerphilly Basin	Penyrheol 4	242	11%-20% most deprived
Mid Valleys West	St. Cattwg 1	280	11%-20% most deprived
Upper Rhymney Valley	Aberbargoed 1	349	11%-20% most deprived
Upper Rhymney Valley	Pontlottyn	315	11%-20% most deprived
Caerphilly Basin	Bedwas Trethomas and Machen 2	293	11%-20% most deprived
Mid Valleys East	Crumlin 3	251	11%-20% most deprived
Mid Valleys East	Newbridge 2	214	11%-20% most deprived
Upper Rhymney Valley	New Tredegar 2	246	11%-20% most deprived
Mid Valleys East	Argoed 1	213	11%-20% most deprived
Mid Valleys East	Cefn Fforest 1	367	11%-20% most deprived
Upper Rhymney Valley	Moriah 2	228	11%-20% most deprived

Community Area	LSOA	WIMD rank	Deprivation Category
Mid Valleys West	Nelson 2	544	21%-30% most deprived
Upper Rhymney Valley	Twyn Carno 2	473	21%-30% most deprived
Caerphilly Basin	Llanbradach 3	453	21%-30% most deprived
Caerphilly Basin	Penyrheol 1	407	21%-30% most deprived
Caerphilly Basin	Penyrheol 3	536	21%-30% most deprived
Upper Rhymney Valley	Gilfach	482	21%-30% most deprived
Upper Rhymney Valley	Bargoed 3	456	21%-30% most deprived
Upper Rhymney Valley	Bargoed 1	538	21%-30% most deprived
Lower Islwyn	Risca East 4	566	21%-30% most deprived
Lower Islwyn	Risca East 2	447	21%-30% most deprived
Mid Valleys East	Blackwood 2	394	21%-30% most deprived
Mid Valleys East	Pengam 2	405	21%-30% most deprived
Mid Valleys East	Pontllanfraith 2	423	21%-30% most deprived
Mid Valleys East	Pengam 1	472	21%-30% most deprived
Mid Valleys East	Cefn Fforest 2	420	21%-30% most deprived
Upper Rhymney Valley	Moriah 1	391	21%-30% most deprived
Caerphilly Basin	St. Martins 2	739	31% -50% most deprived
Caerphilly Basin	Morgan Jones 4	926	31% -50% most deprived
Caerphilly Basin	Aber Valley 2	633	31% -50% most deprived
Caerphilly Basin	Aber Valley 1	713	31% -50% most deprived
Mid Valleys West	Ystrad Mynach 2	659	31% -50% most deprived
Mid Valleys West	Hengoed 3	677	31% -50% most deprived
Mid Valleys West	Hengoed 1	619	31% -50% most deprived
Mid Valleys West	St. Cattwg 2	729	31% -50% most deprived
Upper Rhymney Valley	Bargoed 2	704	31% -50% most deprived
Upper Rhymney Valley	Darran Valley 1	832	31% -50% most deprived
Caerphilly Basin	Bedwas Trethomas and Machen 7	826	31% -50% most deprived
Mid Valleys East	Newbridge 4	798	31% -50% most deprived
Mid Valleys East	Crumlin 4	929	31% -50% most deprived
Mid Valleys East	Pontllanfraith 1	664	31% -50% most deprived
Lower Islwyn	Abercarn 2	718	31% -50% most deprived
Lower Islwyn	Risca West 2	922	31% -50% most deprived
Lower Islwyn	Risca West 3	635	31% -50% most deprived
Lower Islwyn	Risca West 1	844	31% -50% most deprived
Lower Islwyn	Crosskeys 2	654	31% -50% most deprived
Lower Islwyn	Ynysddu 1	887	31% -50% most deprived
Lower Islwyn	Abercarn 3	720	31% -50% most deprived
Mid Valleys East	Argoed 2	710	31% -50% most deprived
Mid Valleys East	Penmaen 2	947	31% -50% most deprived
Mid Valleys East	Blackwood 4	945	31% -50% most deprived
Upper Rhymney Valley	New Tredegar 1	578	31% -50% most deprived
Mid Valleys East	Pontllanfraith 5	715	31% -50% most deprived
Mid Valleys East	Pengam 3	918	31% -50% most deprived
Caerphilly Basin	St. James 1	1172	50% least deprived
Caerphilly Basin	Penyrheol 6	1675	50% least deprived

Community Area	LSOA	WIMD rank	Deprivation Category
Mid Valleys West	Nelson 1	1134	50% least deprived
Mid Valleys West	Nelson 3	1390	50% least deprived
Caerphilly Basin	Morgan Jones 1	1075	50% least deprived
Caerphilly Basin	St. Martins 1	1552	50% least deprived
Caerphilly Basin	St. Martins 4	1697	50% least deprived
Caerphilly Basin	St. Martins 3	1393	50% least deprived
Caerphilly Basin	St. Martins 5	1878	50% least deprived
Caerphilly Basin	Morgan Jones 3	1169	50% least deprived
Caerphilly Basin	Penyrheol 7	1340	50% least deprived
Caerphilly Basin	Penyrheol 5	1374	50% least deprived
Caerphilly Basin	Penyrheol 2	1833	50% least deprived
Caerphilly Basin	Llanbradach 1	1138	50% least deprived
Caerphilly Basin	Bedwas Trethomas and Machen 1	1652	50% least deprived
Caerphilly Basin	St. James 2	1496	50% least deprived
Caerphilly Basin	Llanbradach 2	987	50% least deprived
Mid Valleys West	Ystrad Mynach 1	1292	50% least deprived
Mid Valleys West	Ystrad Mynach 3	1576	50% least deprived
Mid Valleys West	Maesycwmmer	1101	50% least deprived
Mid Valleys West	St. Cattwg 4	1565	50% least deprived
Mid Valleys West	St. Cattwg 3	1008	50% least deprived
Caerphilly Basin	Bedwas Trethomas and Machen 5	1054	50% least deprived
Caerphilly Basin	Bedwas Trethomas and Machen 3	1665	50% least deprived
Caerphilly Basin	Bedwas Trethomas and Machen 4	1638	50% least deprived
Mid Valleys East	Crumlin 2	1558	50% least deprived
Mid Valleys East	Newbridge 3	1110	50% least deprived
Mid Valleys East	Crumlin 1	1448	50% least deprived
Mid Valleys East	Newbridge 1	1242	50% least deprived
Mid Valleys East	Penmaen 1	1733	50% least deprived
Lower Islwyn	Abercarn 1	1032	50% least deprived
Lower Islwyn	Risca East 3	1387	50% least deprived
Lower Islwyn	Risca East 1	1225	50% least deprived
Lower Islwyn	Ynysddu 2	1083	50% least deprived
Lower Islwyn	Crosskeys 1	1275	50% least deprived
Mid Valleys East	Blackwood 5	1682	50% least deprived
Mid Valleys East	Penmaen 3	1519	50% least deprived
Mid Valleys East	Blackwood 3	1731	50% least deprived
Mid Valleys East	Blackwood 1	1009	50% least deprived
Mid Valleys East	Pontllanfraith 3	1007	50% least deprived
Mid Valleys East	Pontllanfraith 4	1713	50% least deprived

Source: WIMD, StatsWales

Household composition

- 4.15 Data from the 2021 ONS Census indicates that nearly 40% of 50+ households in Caerphilly County Borough have only one person living there. Nearly half (49%) of these individuals live in three-bedroom homes, and only 15% live in one-bedroom homes.

- 4.16 The 2021 ONS Census also provides data on 'single family households: All aged 66 years and over', this refers to a household where all individuals living in the same dwelling are aged 66 years or older. Amongst all 50+ households, 16% are households consisting entirely of individuals aged 66. These households are also more likely to live in three-bedroom homes (61%), with only a small proportion (3%) occupying one-bedroom homes.

Table 4. Number. of bedrooms in households occupied by people aged 50+ in Caerphilly County Borough

Household composition	1 bed	2 beds	3 beds	4+ beds	Total	%
One-person household	2,557	5,186	8,400	1,001	17,144	37%
Other household types	21	181	971	503	1,676	4%
Single family household: All aged 66 years and over	200	1,656	4,514	1,051	7,421	16%
Single family household: Couple family household	206	2,312	9,920	3,589	16,027	35%
Single family household: Lone parent household	41	834	2,569	431	3,875	8%

Source: ONS Census 2021

Table 5. Number of bedrooms in households occupied by people aged 50+ as a percentage in Caerphilly County Borough

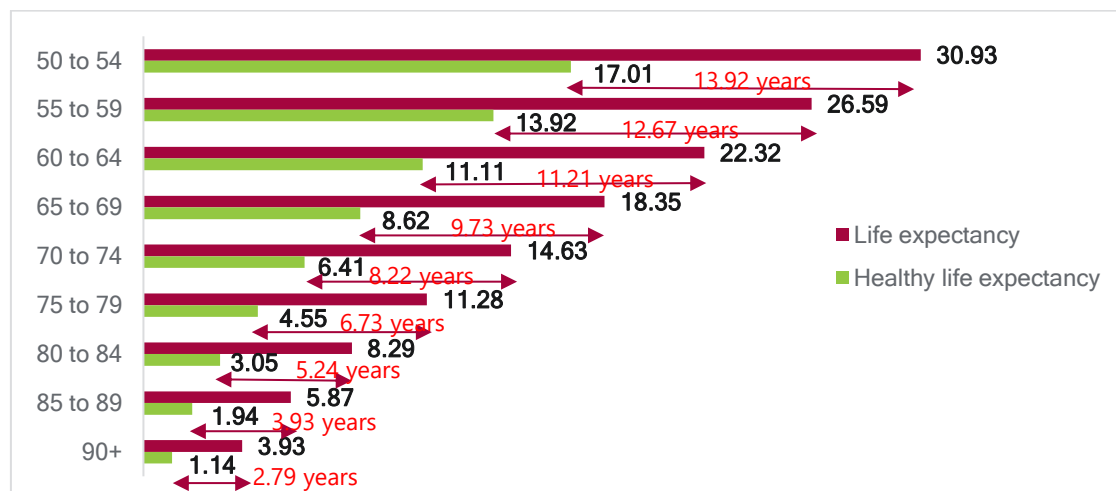
Household Composition	1 bed	2 beds	3 beds	4+ beds
One-person household	15%	30%	49%	6%
Other household types	1%	11%	58%	30%
Single family household: All aged 66 years and over	3%	22%	61%	14%
Single family household: Couple family household	1%	14%	62%	23%
Single family household: Lone parent household	1%	22%	66%	11%

Source: ONS Census 2021

Health profile of the older population

- 4.17 The life expectancy for people aged 50 in Caerphilly County Borough is c.31 years, this is slightly lower than the life expectancy for people aged 50 in Wales (c.32 years).
- 4.18 Figure 4 indicates that there is a health gap between the life expectancy and the healthy life expectancy of people in Caerphilly County Borough. For example, those aged 50 to 54 have an average life expectancy of 30.93 years, but only 17.01 of those years are expected to be lived in good health, meaning approximately 13.92 years may be lived with health-related limitations.
- 4.19 The health gap between life expectancy and healthy life expectancy persists across all older age groups (see below chart).

Figure 4. Life expectancy and Healthy life expectancy of 50+ year old population (persons) in Caerphilly County Borough



Source: Life expectancy for local areas of Great Britain (2024)⁶⁹, Health state life expectancy, all ages, UK⁷⁰

4.20 The data indicates that females tend to live longer and also enjoy a slightly longer period of good health compared to males. For example, women aged 50 to 54 have a life expectancy of 32.32 years and a healthy life expectancy of 17.39 years, while men of the same age have a life expectancy of 29.53 years and a healthy life expectancy of 16.63 years. This indicates that women live, on average, around 15 years beyond good health, whereas men live about 13 years.

Table 6. Life expectancy and healthy life expectancy by gender (years) in Caerphilly County Borough

Age	Life expectancy		Healthy life expectancy	
	Female	Male	Female	Male
50 to 54	32.32	29.53	17.39	16.63
55 to 59	27.94	25.23	14.34	13.51
60 to 64	23.63	21.01	11.54	10.68
65 to 69	19.46	17.24	9.01	8.23
70 to 74	15.55	13.70	6.73	6.09
75 to 79	12.04	10.52	4.79	4.30
80 to 84	8.84	7.74	3.22	2.87
85 to 89	6.27	5.46	2.05	1.82
90+	4.35	3.51	1.25	1.03

Source: Life expectancy for local areas of Great Britain (2024), Health state life expectancy, all ages, UK

4.21 Figure 5 shows the self-reported health status of the 50+ population in Caerphilly County Borough from the ONS 2021 Census. The majority of people aged 50+ (57%) self-reported as being in very good or good health. However, a significant proportion (27%) rated their health as

⁶⁹Life expectancy. Available at

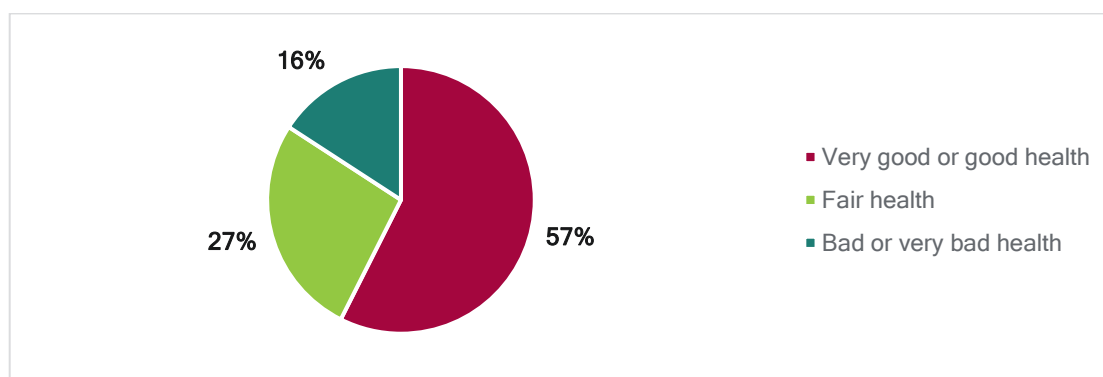
<https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/healthandlifeexpectancies/datasets/lifeexpectancyforlocalareasofgreatbritain>

⁷⁰ Healthy life expectancy. Available at

<https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/healthandlifeexpectancies/datasets/healthstatelifeexpectancyallagesuk>

fair, while 16% described their health as bad or very bad. These findings suggest that while more than half of older residents perceive themselves to be in good health, a notable share is already reporting health challenges.

Figure 5. Self-reported health status of 50+ population in Caerphilly County Borough



Source: ONS Census 2021

- 4.22 In Caerphilly County Borough, there were 3,489 people aged 65 and over diagnosed with dementia in 2020. This number is projected to increase to 5,943 by 2025. This represents an increase of 70.3% in the number of dementia cases in Caerphilly County Borough⁷¹.
- 4.23 The National Survey for Wales⁷² reports that almost three quarters (72%) of people aged over 65 across Wales report feeling lonely sometimes, compared to 70% of those aged 45-64, while 10% of older people in Wales – an estimated 91,000 people – feel consistently lonely. These figures are slightly lower than during the pandemic (75% and 11%).

Current supply of older persons' accommodation in Caerphilly County Borough

- 4.24 Data from the Elderly Accommodation Counsel, a charity that provides an online directory of specialist housing and services for older people, has been cross-referenced with Caerphilly County Borough Council and Registered Social Landlords to provide the existing supply of older persons' housing in Caerphilly County Borough. The different types of older persons' housing that have been considered in the current supply analysis are retirement/sheltered housing, age-designated housing and extra care housing. Definitions of these are provided in the table below.

Table 7. Definitions of older persons' housing types

Older persons' housing type	Definition
Retirement/sheltered housing	These homes typically offer self-contained accommodation for people over a certain age; this tends to be 55+ or 60+. They are usually supported by a part-time/visiting scheme manager and 24-hour emergency help via an alarm. There are often communal areas and some offer activities. In the social sector, most

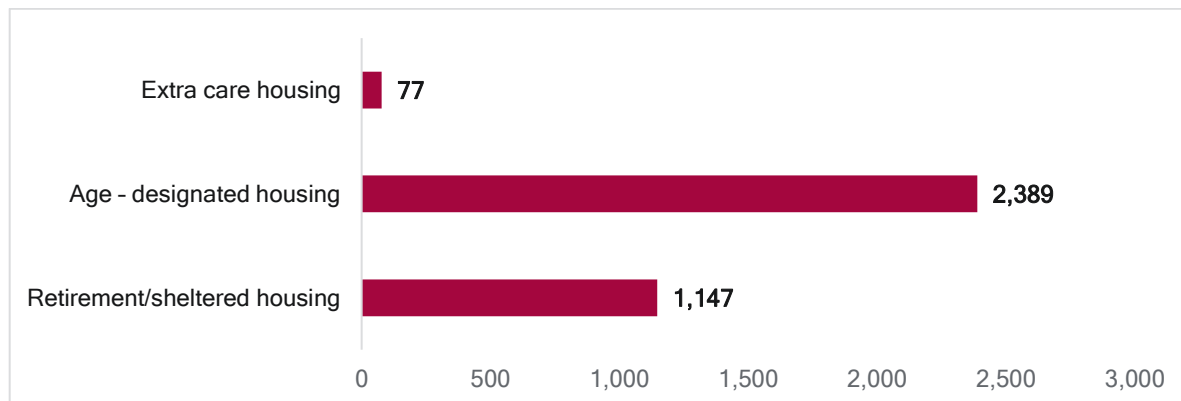
⁷¹ Caerphilly County Borough Area Assessment of Local Well-being <https://www.gwentpsb.org/wp-content/uploads/2022/03/Caerphilly-Basin-Local-Well-being-Assessment-Final-1.pdf>

⁷² <https://olderpeople.wales/wp-content/uploads/2023/01/221222-Understanding-Wales-ageing-population-24-November.pdf>

Older persons' housing type	Definition
	accommodation is offered for social or affordable rent, based on need, by local councils or Registered Rocial Landlords. In the private sector, it is usually built by private developers for market sale (and sometimes for market rent). Once all the properties have been sold, the scheme is sometimes run by a separate management company that employ a scheme manager who organises maintenance and other services.
Age-designated housing	These homes typically offer self-contained accommodation for people over a certain age; this tends to be 55+ or 60+. Unlike retirement/sheltered housing they are not supported by a scheme manager, but they may have access to 24-hour emergency help via an alarm. They may have the provision of communal areas. In the social sector, some age-designated housing may have once been retirement/sheltered housing, but it has been de-designated.
Extra care housing	Often referred to as 'extra care housing' when provided by Registered Rocial Landlords and local authorities (for affordable rent and shared ownership) and 'assisted living' or 'retirement villages' or 'integrated retirement communities' by private sector providers for market sale (and sometimes for market rent). Extra care housing is designed for older people, some with higher levels of care and support needs. Residents live in self-contained homes. It typically has more communal facilities and offers access to on-site 24/7 care services, which include assistance with meal preparation, washing and other daily duties (some private extra care housing schemes may offer access to care services as distinct from on-site 24/7 care staff). Often includes a 24/7 alarm system, presence of a scheme manager and a team of support staff.

- 4.25 There are currently 1,147 homes in retirement/sheltered housing across 49 retirement/sheltered housing schemes. The vast majority of the retirement/sheltered housing units are available for social/affordable rent.
- 4.26 There are currently 2,389 homes in age-designated housing and 77 homes in extra care housing across 2 extra care housing schemes in Caerphilly County Borough. All extra care housing units are provided as social/affordable rent.
- 4.27 The supply details of older persons' accommodation are provided in Annexe (Table 19 and Table 20).

Figure 6. Number of units of older persons' housing in Caerphilly County Borough



Source: EAC (2019), Caerphilly County Borough Council (2025), Aelwyd Housing (2025), Linc Cymru (2025), Pobl (2025), United Welsh (2025), Wales and West Housing (2025)

- 4.28 The prevalence rate of retirement/sheltered housing, age-designated housing and extra care housing is calculated to indicate the number of homes (units) per 1,000 people. For retirement/sheltered housing and age-designated housing, the 65+ population is used. For extra care housing, the 75+ population is used.
- 4.29 This is used as a means of comparison with national average prevalence rates for the supply of older persons' housing. The table below indicates that Caerphilly County Borough has a lower prevalence rate of retirement/sheltered housing and extra care housing compared to the national average for Wales.
- 4.30 Caerphilly County Borough has a significantly higher prevalence rate of age-designated housing compared to the national average for Wales. However, it should be noted that the data from the Welsh national average may have some inaccuracies as this supply data hasn't been cross-referenced with Registered Social Landlords as per the CCBC supply data.

Table 8. Prevalence of retirement/sheltered housing, age-designated housing and extra care housing in Caerphilly County Borough compared to the Welsh national average

Area	Housing type	Units	Population	Prevalence
Caerphilly County Borough	Retirement/sheltered housing	1,147	37,295	31
	Age – designated housing	2,389	37,295	64
	Extra care housing	77	17,822	4
Wales	Retirement/sheltered housing	23,989	698,560	34
	Age – designated housing	6,074	698,560	9
	Extra care housing	2,891	344,396	8

Source: EAC (2019) and HLIN

NB: 'Prevalence' denotes the prevalence rate – the number of homes (units) per 1,000 population aged 65+ for retirement/sheltered housing and age-designated housing, and per 1,000 population aged 75+ for extra care housing

Further details and demographics of the people living in the current supply of older persons' accommodation in Caerphilly County Borough

Retirement/sheltered housing

- 4.31 The evidence on the current supply of retirement/sheltered housing in Caerphilly County Borough indicates that the Council is the largest provider of retirement/sheltered housing across the borough.

- 4.32 The average age across the supply of retirement/sheltered housing ranges from 68 to 80, indicating some variation in the ages of people living in retirement/sheltered housing. The qualitative evidence from Registered Social Landlords indicates that the profile of people living in retirement/sheltered housing is becoming increasingly diverse. The tenant profile has significantly changed from 'traditional' older residents, and schemes now include younger people, typically men, sometimes with complex support needs (mental health, addiction, behavioural issues).
- 4.33 The data indicates that a large proportion of people in CCBC, Wales and West Housing and United Welsh retirement/sheltered housing are receiving Housing Benefit whilst a minority of Linc Cymru residents are in receipt of Housing Benefit.
- 4.34 The average length of stay in retirement/sheltered housing is approximately 8 years.
- 4.35 The evidence from the qualitative research indicates that much of the existing retirement/sheltered housing is older buildings with outdated designs, making them less attractive to potential tenants and unsuitable for some residents with accessibility needs.

Table 9. Summary details and demographics of customers in retirement/sheltered housing in Caerphilly County Borough

Registered Social Landlord	No. of units	Average age	Percentage of residents receiving Housing Benefit	Average length of stay (years)
Caerphilly County Borough Council	842*	76	70%	7
Linc Cymru	92	71	28%	-
United Welsh	91	68	54%	7
Aelwyd Housing	0	-	-	-
Pobl	14	80	-	10
Wales and West Housing	108	69	74%	8.06
Total	1,147	73	57%	8

Source: EAC (2019), Caerphilly County Borough Council (2025), Aelwyd Housing (2025), Linc Cymru (2025), Pobl (2025), United Welsh (2025), Wales and West Housing (2025)

*Out of 842 units, Caerphilly County Borough Council currently have 61 units that are void

Age-designated housing

- 4.36 The evidence on the current supply of age-designated housing in Caerphilly County Borough indicates that CCBC has a significant amount of age-designated housing compared with other Registered Social Landlords in the area.
- 4.37 The evidence from the qualitative research highlighted that CCBC hold such a large proportion of age-designated housing for historic reasons. There is widespread recognition amongst CCBC staff that a significant portion of age-designated stock is not suitable for older people, particularly in terms of accessibility of the buildings.
- 4.38 The Council is actively reviewing its age-designated stock, with the aim of re-designating properties that are not suitable for older people back to general needs housing and potentially designating some general needs stock as age-appropriate if it is better suited. A comprehensive stock condition and accessibility survey is underway to assess all properties and inform decisions about which should remain age-designated and which should be re-designated.

- 4.39 The average age of people in age-designated housing is slightly younger than in sheltered housing, at 71 years old.

Table 10. Summary details and demographics of customers in age-designated housing in Caerphilly County Borough

Registered Social Landlord	No. of units	Average age	Percentage of residents receiving Housing Benefit	Average length of stay (years)
Caerphilly County Borough Council	2,275*	73	63%	9
Linc Cymru	0	-	-	-
United Welsh	98	68	38%	9
Aelwyd Housing	16	72	50%	-
Pobl	0	-	-	-
Wales and West Housing	0	-	-	-
Total	2,389	71	50%	9

Source: EAC (2019), Caerphilly County Borough Council (2025), Aelwyd Housing (2025), Linc Cymru (2025), Pobl (2025), United Welsh (2025), Wales and West Housing (2025)

*Out of 2,275 units, Caerphilly County Borough Council currently have 213 units that are void

Extra care housing

- 4.40 The evidence on the current supply of extra care housing in Caerphilly County Borough indicates that extra care housing is only provided by two Registered Social Landlords in the borough.
- 4.41 The average age in extra care housing is 78, this is higher than the average age in retirement/sheltered housing (73) and age-designated housing (71). This indicates that extra care housing is more likely to accommodate an 'older' old cohort of people with higher care/support needs.
- 4.42 The average length of stay in extra care housing is 7 years, which is shorter than retirement/sheltered housing (8 years) and age-designated housing (9 years). This indicates that this type of housing tends to be used for individuals with higher or more complex care needs as an alternative to a care home.

Table 11. Summary demographics of customers in extra care housing in Caerphilly County Borough

Registered Social Landlord	No. of units	Average age	Percentage of residents receiving Housing Benefit	Average length of stay (years)
Caerphilly County Borough Council	0	-	-	-
Linc Cymru	0	-	-	-
United Welsh	49	75	54%	3.5
Aelwyd Housing	0	-	-	-
Pobl	28	80	79%	10
Wales and West Housing	0	-	-	-
Total	77	78	67%	7

Source: EAC (2019), Caerphilly County Borough Council (2025), Aelwyd Housing (2025), Linc Cymru (2025), Pobl (2025), United Welsh (2025), Wales and West Housing (2025)

General needs housing occupied by residents aged 55+

- 4.43 The evidence from the data from Registered Social Landlords and Caerphilly Homes in Caerphilly highlights that there are nearly 5,000 units accommodating someone over the age of 55 living in general needs accommodation, with an average age of 67.
- 4.44 This indicates that there is potentially a large number of older people in general needs housing who may require support or alternative accommodation should their home not meet their needs in the future.

Table 12. Summary details and demographics of general needs units accommodating someone over the age of 55 in Caerphilly County Borough

Registered Social Landlord	No. of units	Average age	Percentage of residents receiving Housing Benefit
Caerphilly County Borough Council	2,876*	67	59%
General needs housing	2721	67	59%
Disabled accommodation	17	66	53%
Single person	138	63	68%
Linc Cymru	1,274	67	-
United Welsh	901	66	35%
Aelwyd Housing	0	-	-
Pobl	0	-	-
Wales and West Housing	40	64	61%
Total	5,091	67	63%

Source: EAC (2019), Caerphilly County Borough Council (2025), Aelwyd Housing (2025), Linc Cymru (2025), Pobl (2025), United Welsh (2025), Wales and West Housing (2025)

*Out of 2,876 general needs accommodation units in Caerphilly County Borough Council stock, 17 are designated for disabled accommodation, 138 for single-person occupancy.

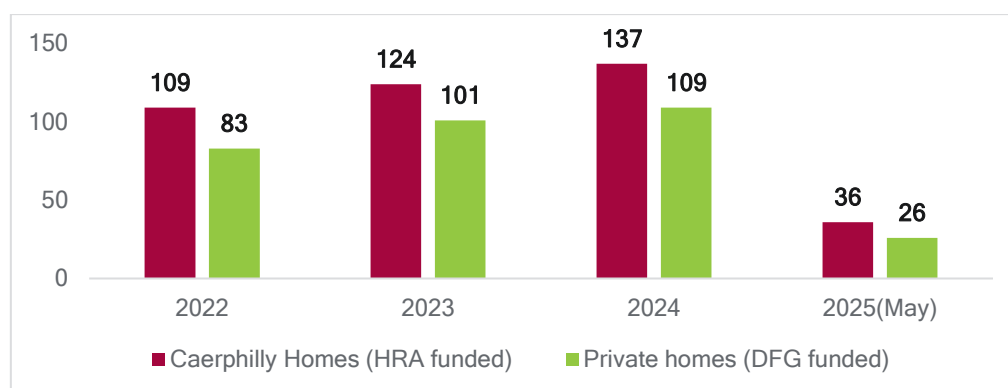
Home adaptations amongst 55+ households

- 4.45 The Disabled Facilities Grant (DFG) is a means-tested capital grant that is funded directly by local authorities, usually from their General Capital Fund, with additional support from Welsh Government capital allocations. Local authorities in Wales have the duty to provide DFGs if an eligible application is approved.
- 4.46 CCBC holds data on the number of adaptations that were delivered in private accommodation in the borough that were funded by the DFG. CCBC also holds data on the number of adaptations that were delivered in Caerphilly Homes properties that were funded by the Housing Revenue Account (HRA). CCBC does not hold data on the number of adaptations delivered in Registered Social Landlord (RSL) stock that is funded through the RSL's HRA.
- 4.47 The data on adaptations from CCBC has been analysed to indicate the trends in the number and types of adaptations that have been delivered amongst 55+ households in private homes that were funded by a DFG and Caerphilly Homes stock that were funded by the HRA. As the data on adaptations delivered by other RSLs has not been included, this is likely to underestimate the demand for adaptations in the future.

Current and estimated number of home adaptations amongst 55+ households

- 4.48 Between 2022/23 and 2025/26 (to May), a total of 725 adaptations were delivered amongst 55+ households across private housing and in Caerphilly Homes stock in the borough. The total number of adaptations delivered increased by c.17% between 2022/23 and 2023/24, rising from 192 to 225, likely reflecting a post-pandemic recovery or a temporary backlog of demand. This increased a further c.9% between 2023/24 and 2024/25, from 225 to 246.
- 4.49 The number of adaptations delivered in 2025/26 currently stands at 62, reflecting partial-year data up to May and therefore has been excluded from the analysis of growth in the number of delivered adaptations.
- 4.50 When comparing the number of adaptations delivered amongst 55+ households across Caerphilly Homes housing stock and households in the private sector, the data indicates that a larger number of adaptations were delivered in Caerphilly Homes housing stock. However, there was a substantially larger increase in the number of adaptations delivered in private housing stock compared to Caerphilly Homes housing stock between 2022/23 and 2024/25.
- 4.51 In the Caerphilly Homes housing stock, 406 adaptations were completed over the period. These rose from 109 in 2022/23 to 124 in 2023/24, a 13.8% increase, and then to 137 in 2024/25, a further 10.5% rise. The 2025/26 figure stands at 36, reflecting data only up to May and likely to rise.
- 4.52 In the private sector, 319 adaptations were delivered between 2022/23 and 2025/26 (to May). Adaptations increased from 83 in 2022/23 to 101 in 2023/24, a 22% increase and rose again to 109 in 2024/25, an 8% increase. The 2025/26 figure is currently 26, again based on partial-year reporting.

Figure 7. The number of adaptations delivered amongst 55+ households from 2022/23 to 2024/25 in Caerphilly borough

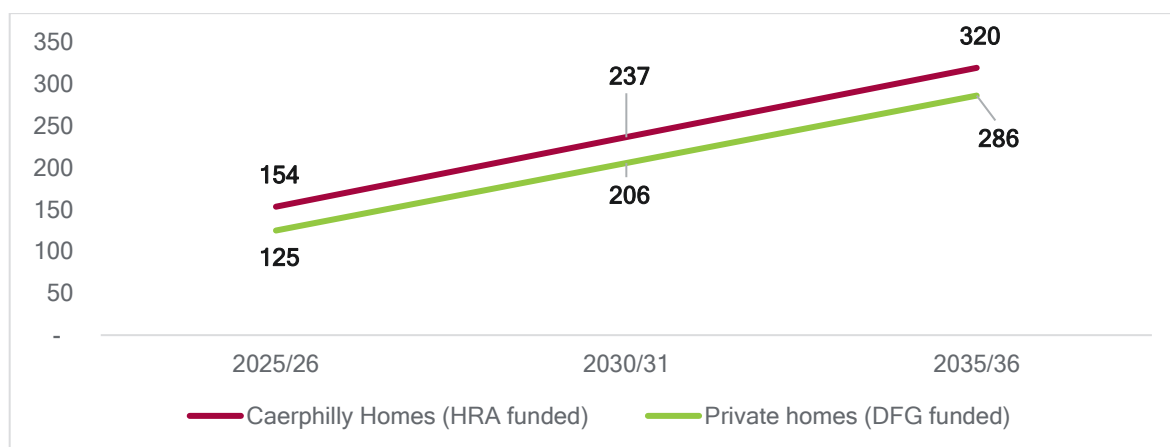


Source: Caerphilly County Borough Council (2025)

- 4.53 Analysis of adaptations delivered in Caerphilly Homes stock over the three financial years 2022/23 to 2024/25 indicates a clear upward trend in demand for home adaptations, representing an average annual growth of approximately 12%. This trend suggests increasing demand for interventions that support independent living for older and disabled residents, particularly in the private sector.
- 4.54 Assuming the historical trend continues, future demand for adaptations has been projected by applying the average annual growth of 12% to the baseline data. Based on this approach, the total number of adaptations is estimated to reach 154 in 2025. By 2030, this is projected to increase to 237, and by 2035, the total could be around 320.

- 4.55 Analysis of adaptations delivered in the private sector via a DFG over the three financial years 2022/23 to 2024/25 indicates a clear upward trend in demand for home adaptations. Private sector adaptations funded by a DFG in Caerphilly borough increased from 83 in 2022/23 to 101 in 2023/24, a 22% rise, likely reflecting a post-pandemic recovery or a temporary backlog of demand. This was followed by a more modest and stable increase to 109 in 2024/25, representing an 8% growth. Given the volatility in the first year, future projections are based on the more recent and stable trend. To support realistic planning, an average annual growth rate of 15% is applied to project future demand.
- 4.56 Assuming the historical trend continues, future demand for adaptations has been projected by applying the average annual growth of 15% to the baseline data. Based on this approach, the total number of adaptations in private housing funded by a DFG is estimated to reach 125 in 2025. By 2030, this is projected to increase to 206, and by 2035, the total could be around 286.

Figure 8. The estimated number of adaptations that may be delivered amongst 55+ households to 2035/36 in Caerphilly borough



Source: Caerphilly County Borough Council (2025), HLIN (2025)

Trends in the types of home adaptations required

- 4.57 The evidence from the data on home adaptations demonstrates that shower and bathroom adaptations were the most common adaptation delivered in 55+ households in Caerphilly Homes stock (HRA) and private housing (DFG). In Caerphilly Homes housing stock, they make up 56% of adaptations delivered between 2022/23 to 2025/26, and 44% in private housing over the time period 2022 to 2025.
- 4.58 The number of shower and bathroom adaptations increased in both sectors, rising by 181% in private housing between 2022 and 2024, and by 27% in Caerphilly Homes between 2022/23 and 2024/25. Stairlifts were the second most common type of adaptation, representing 28% of private housing adaptations and 25% of Caerphilly Homes adaptations, with delivery remaining relatively stable across the Caerphilly Homes financial years but fluctuating year-to-year in private housing.
- 4.59 Access and entry adaptations, including external ramps, made up 13% of adaptations in Caerphilly Homes and 6% in private housing, with volumes varying annually in both datasets. The number of access and entry adaptations increased in both sectors over the comparable period. In private housing (DFG), delivery rose from 3 adaptations in 2022 to 10 in 2023 (an increase of 233%), before declining thereafter. In Caerphilly Homes stock (HRA), delivery

increased from 14 adaptations in 2022/23 to 24 in 2024/25, representing an overall increase of 71% over this period. Wheelchair and mobility access works and wash-and-dry WCs were the least frequently delivered in each tenure.

- 4.60 It should also be noted that some applications covered multiple adaptation types—such as requests for both a stairlift and a shower adaptation—highlighting the significant and often complex mobility needs of residents.
- 4.61 The tables below show the types of adaptations delivered amongst households 55+ in Caerphilly Homes (HRA) and private housing stock (DFG).

Table 13. Types of adaptation delivered amongst households 55+ in Caerphilly Homes (HRA) from 2022/23 to 2025/26

Category	2022/23	2023/24	2024/25	2025/26	Total
Access & Entry	14	10	24	3	51
Internal Alterations & Hoists	6	12	9	1	28
Shower & Bathroom Adaptations	56	67	71	18	212
Stairlifts	30	29	31	13	103
Wheelchair & Mobility Access	1	3	0	1	5
Wash & Dry WC	2	3	2	0	7
Grand Total	109	124	137	36	406

Source: Caerphilly County Borough Council (2025)

Table 14. Types of adaptation delivered amongst households 55+ in private housing stock (DFG) from 2022 to 2025

Category	2022	2023	2024	2025	Total
Access & Entry	3	10	3	2	18
Internal Alterations & Hoists	11	7	7	3	28
Shower & Bathroom Adaptations	27	45	76	13	161
Stairlifts	13	39	21	8	81
Wheelchair & Mobility Access	0	1	2	0	3
Wash & Dry WC	0	0	2	0	2
Grand Total	54	102	111	26	293

Source: Caerphilly County Borough Council (2025)

NB: The private DFG totals use calendar-year data (2022, 2023, 2024, 2025), whereas the Caerphilly Homes HRA totals use financial-year data (2022/23, 2023/24, 2024/25, 2025/26). As a result, the totals are not directly comparable and will differ from those used in the projections.

Summary of demographic evidence and existing supply: Implications for Caerphilly County Borough Council

- 4.62 The borough has a growing older population. By 2040, Caerphilly's 70+ population will rise by 25% and the 80+ population by 37%, creating much higher demand for suitable housing and support.
- 4.63 75% of over-50s are homeowners, but younger cohorts (45–49) are less likely to own, meaning future older people may depend more on rented housing.
- 4.64 Around 38% of the borough's communities fall within the most deprived 30% in Wales, with concentrations in Upper Rhymney Valley and Caerphilly Basin.

- 4.65 Nearly half of single-person older households live in three-bedroom homes, suggesting scope for moving/rightsizing if attractive alternatives exist.
- 4.66 Life expectancy in Caerphilly is slightly lower than the Welsh average, with around 14 years of later life often lived in poor health. Dementia diagnoses in over-65s are projected to rise by 70% by 2025. This suggests that housing and support options need to support people with poor health.
- 4.67 The borough has 1,147 sheltered/retirement units, 2,389 age-designated homes, and just 77 extra care units. Sheltered and extra care prevalence rates are below Welsh averages, but age-designated housing is significantly above average.
- 4.68 Much sheltered/age-designated housing is older, with accessibility issues and high voids. Extra care is very limited and mainly provided by housing associations.
- 4.69 Demand for adaptations is rising, with a 40% increase in grants between 2022/23 and 2023/24. Bathroom adaptations and stairlifts are most common. Projections suggest strong growth in demand through 2035.
- 4.70 The implications of this for the Council are:
- A need to plan strategically for the rapid growth in the 70+ and 80+ cohorts that is likely to increase the need for housing that is suited to the needs of older people, both for new build and existing homes.
 - There is potential scope to expand the provision of extra care housing to meet the needs of an ageing population as well as reviewing the provision of sheltered/age-designated stock, which may include investment in new, modern alternatives.
 - Many single-person older households remain in family-sized homes. Supporting people to move in later life could free up family-sized homes, but only if attractive, affordable, and well-located homes are available.
 - Future older populations are less likely to be homeowners, increasing reliance on social and private rented housing. CCBC will need to strengthen the provision of affordable housing options for people in later life.
 - Rising dementia and long periods in poor health mean closer alignment of housing, health, and care is essential. Extra care housing could be expanded to reduce pressure on residential care.
 - With demand for adaptations rising, CCBC should scale up capacity for adaptations and develop proactive housing advice services to keep people safe at home for longer.

5. Primary research

- 5.01 This section of the research report provides the key findings from the primary research undertaken with older people and other stakeholders on older people's likelihood of moving/rightsizing in Caerphilly borough, the housing preferences of older people, factors that encourage people to move and barriers to moving and how these can be overcome.

Primary research methodology

- 5.02 A mixed-mode approach to the primary research with older people and other stakeholders using both qualitative and quantitative methods was used. The intention was to understand older people's and other stakeholders' views on moving/rightsizing in later life and the likelihood of moving/rightsizing in Caerphilly borough.
- 5.03 The primary research with older people with lived experience involved undertaking a survey (online and paper based) as well as qualitative research in-person via focus groups and interviews.
- 5.04 The survey was designed in collaboration with Caerphilly County Borough Council based on the brief from CCBC. The Housing LIN utilised the structure and questions from previous surveys undertaken with older people across the UK to ensure that the questions would be widely understood by respondents.
- 5.05 The survey was advertised online via the Council's webpages and shared via social media platforms, with targeted communications at specific groups where needed. Other Registered Social Landlords and community organisations also promoted the survey online.
- 5.06 Around 500 paper surveys and pre-paid return envelopes were dropped off at local libraries and community groups across the borough, including those connected to the Age-friendly Caerphilly programme. Caerphilly Cares also handed out paper surveys and supported people to complete online versions of the survey.
- 5.07 Topic guides were designed based on CCBC's brief and used to guide the qualitative research with people with lived experience and professional stakeholders. These were also sense checked with CCBC officers.
- 5.08 The research engaged with c.100 people with lived experience and c.20 professional stakeholders through a mix of in-person and online focus groups and interviews, to engage with a range of professional stakeholders and people with lived experience. The table below demonstrates the range of stakeholders that were engaged with as part of this research.
- 5.09 Research participants with lived experience received a £10 Love2Shop voucher as a 'thank you' for their time.

Table 15. Qualitative research participants

Group	No. of people	Method
CCBC Sheltered Housing Tenants - Gwyddon Court and The Ranks - Waunrhydd - Grove 2	25	In-person
CCBC General Needs Tenants	10	In-person
Caerphilly over 50s Forum at Moose Hall, Blackwood	7	In-person
Elderberries at Caerphilly Miners Centre	10	In-person
Men's Shed at Caerphilly Miners Centre	8	In-person
Woodfield Side Senior Citizens Group	30	In-person
Cefn Fforest Community Centre coffee morning	10	In-person
Focus group with Registered Social Landlords: - United Welsh - Linc Cymru - Wales & West Housing	3	Online
Focus group and interview with CCBC staff	12	Online
Interview with Gwent Association of Voluntary Organisations (GAVO) staff	1	In-person
Interview with Imaan Islamic Society of Blaenau Gwent	1	Online

- 5.10 A steering group comprising internal colleagues and with representation from United Welsh supported the primary research with fortnightly meetings.

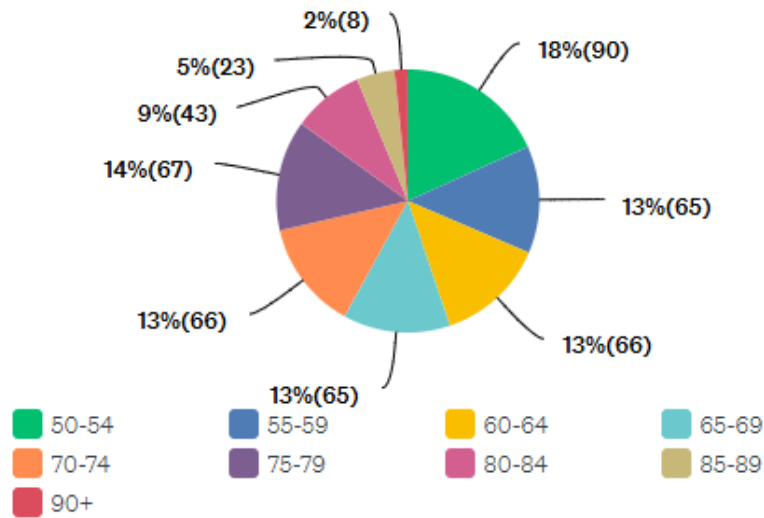
Demographic data of research participants with lived experience

Survey respondent demographics

Age

- 5.11 The survey results indicate a fairly balanced distribution among people aged 50+, though with some skew toward 'younger' older people. Respondents aged 50 to 65 represent the largest share at 44%, followed by those aged 65 to 80, who make up 40% of participants. Individuals aged 80 and older account for 16%, which, while smaller, still represents a meaningful portion of the sample.
- 5.12 Overall, the data suggests a reasonable mix of ages, particularly within the 50–80 range, which collectively accounts for 84% of respondents. However, representation diminishes significantly among those over 80, indicating that 'older' old people are underrepresented compared to 'younger' old people.

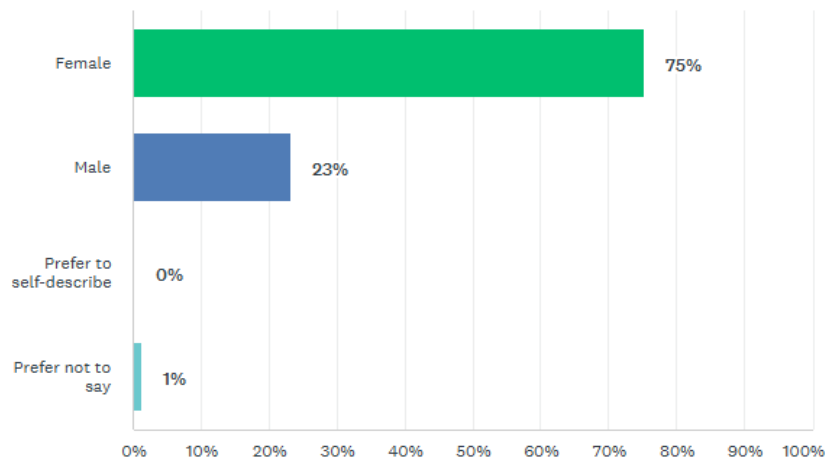
Figure 9. Age demographics of survey respondents



Sex

- 5.13 The majority (75%) of survey respondents are female. In general, surveys tend to receive greater responses from female respondents. The qualitative research sought to engage with male only community groups to counter the prevalence of female responses to the survey.

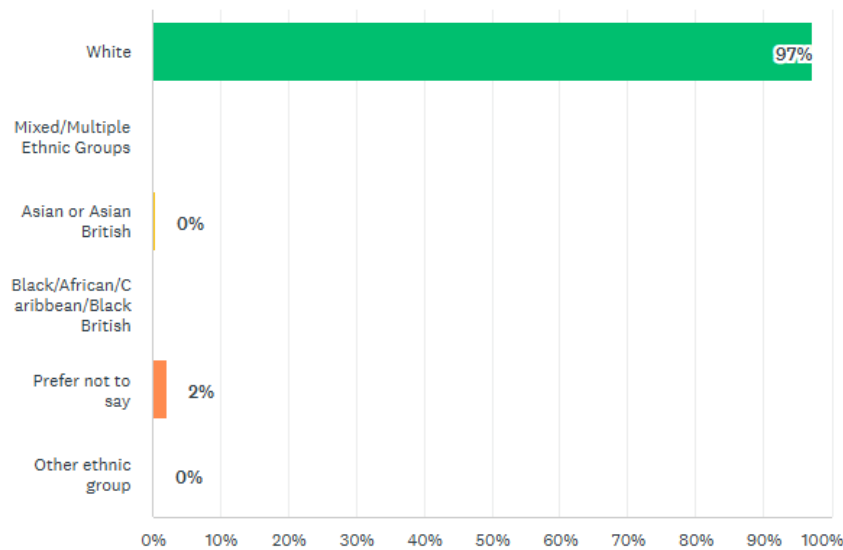
Figure 10. Sex of survey respondents



Ethnicity

- 5.14 The vast majority of survey respondents are white. This reflects the ethnic makeup of Caerphilly County Borough.

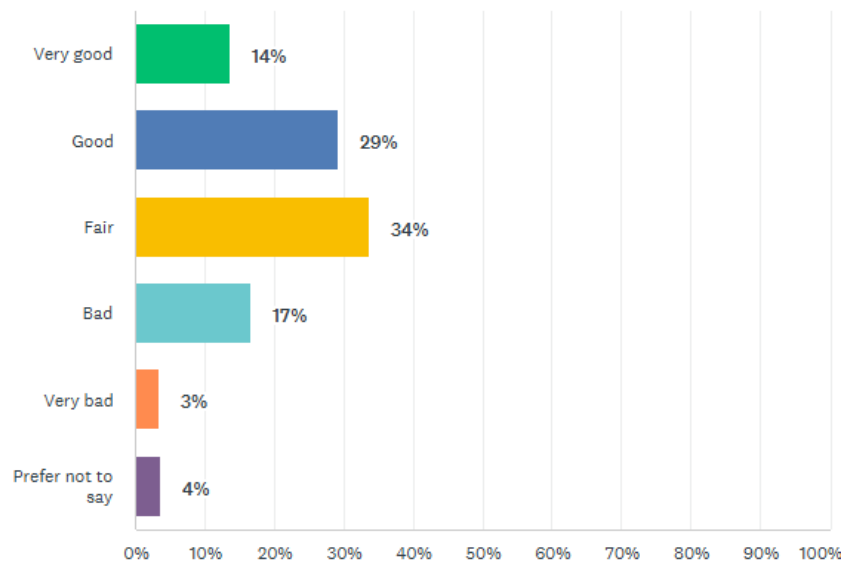
Figure 11. Ethnicity of survey respondents



Health

- 5.15 When asked to describe their general health, most respondents rated themselves in the mid to positive range. Overall, the majority of participants (77%) perceive their health as very good, good or fair, with nearly half (43%) placing themselves in the good to very good category. While a notable minority (20%) report poor health (bad or very bad), these figures indicate that most respondents view their health positively, albeit with a significant portion stating that they are moderately healthy.

Figure 12. Self-described health of survey participants

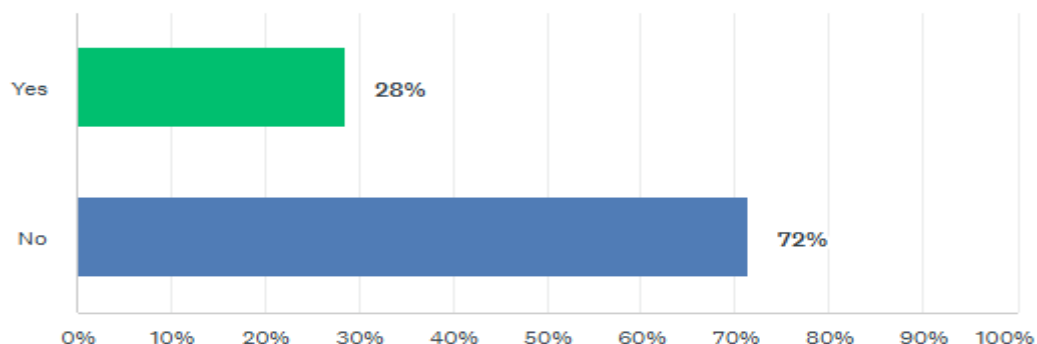


House type: Older persons' housing vs mainstream housing

- 5.16 The majority (72%) of survey respondents do not live in older persons' housing (retirement/sheltered or extra care housing). However, the survey did receive a sizable proportion of responses from people living in retirement/sheltered housing, in total 141 responses. This has been taken into account in the survey results and the views of people living

in older persons' housing and mainstream housing have been analysed separately where needed.

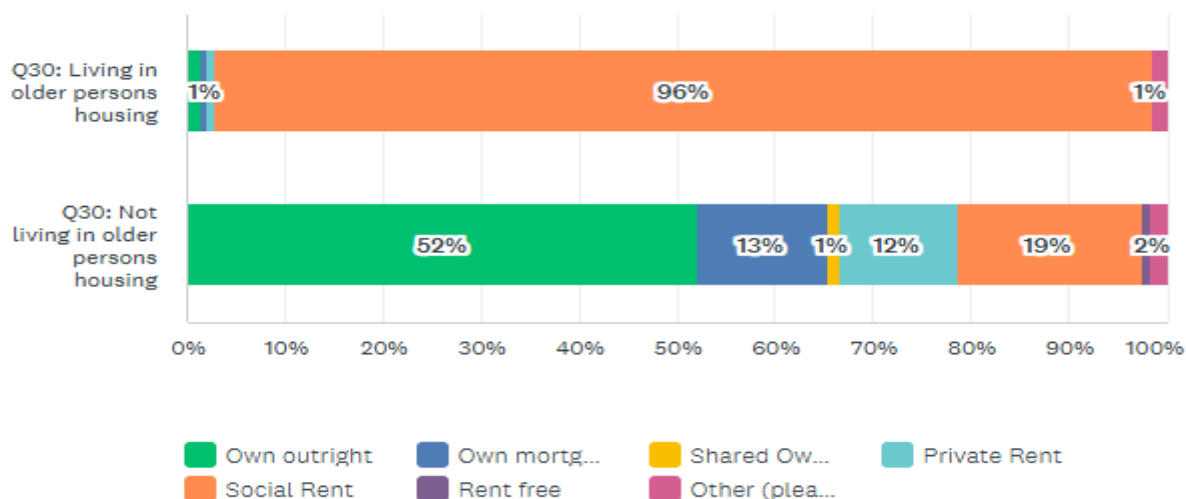
Figure 13. Percentage of survey respondents that live in older persons' housing



Tenure

- 5.17 The vast majority of survey respondents that are living in older persons' housing are living in social rented properties; a minority stated that they live in owner occupied older persons' housing (it is worth noting that this may have been a mistake as there is only one scheme owned by Pobl that is thought to offer leasehold properties).
- 5.18 Amongst survey respondents not living in older persons' housing, the majority own their own homes (66%), with most owning their homes outright (52%) compared to with a mortgage (13%) or via shared ownership (1%). 31% of survey respondents rent their homes, with nearly 20% renting from a social landlord and 12% renting from a private landlord.

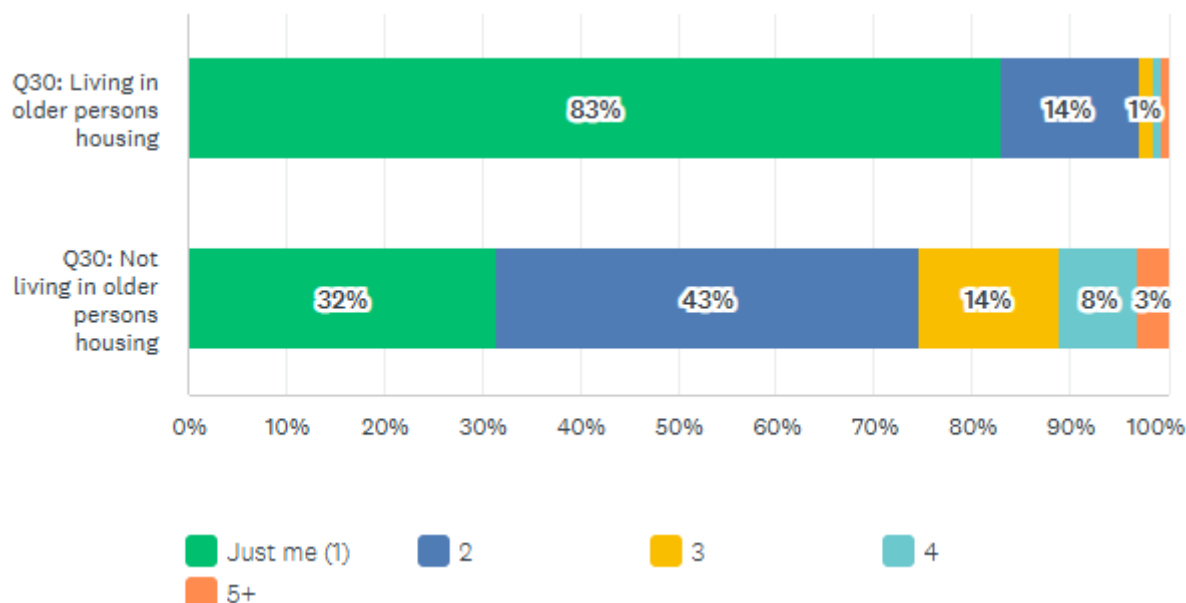
Figure 14. Tenure of survey respondents comparing responses from people living and not living in older persons' housing



Household composition

- 5.19 The majority of survey respondents living in older persons' housing live alone (83%), with a minority living with just one other person (14%).
- 5.20 The household composition of people not living in older persons' housing is more mixed. The majority (68%) of survey respondents not living in older persons' housing live with other people, about a third live alone.

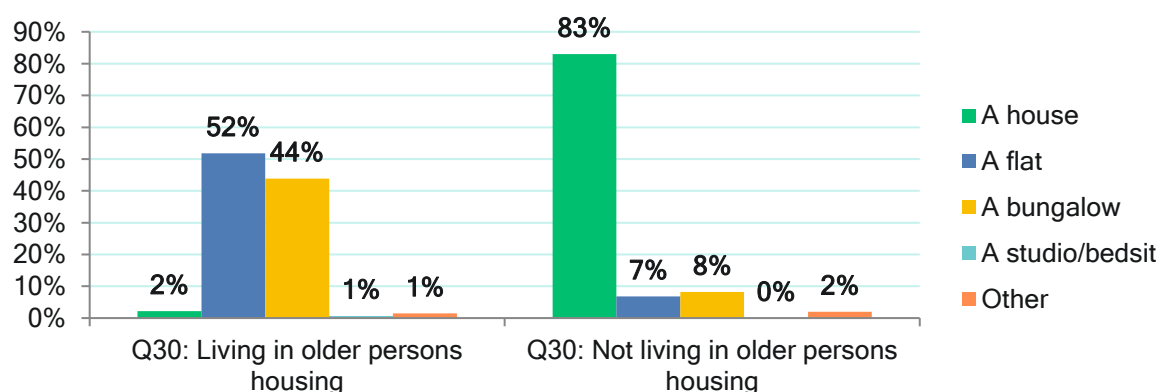
Figure 15. Household composition comparing responses from people living and not living in older persons' housing



Type of house

- 5.21 Among respondents living in older persons' housing, the majority reside in flats (52%) and bungalows (44%). A very small proportion reported living in houses (2%), studios or bedsits (1%), and other types of housing (1%).
- 5.22 In contrast, respondents not living in older persons' housing predominantly live in houses (83%), with significantly fewer living in bungalows (8%) or flats (7%). None in this group reported living in studio/bedsit accommodation.

Figure 16. Housing type comparing responses from people living and not living in older persons' housing

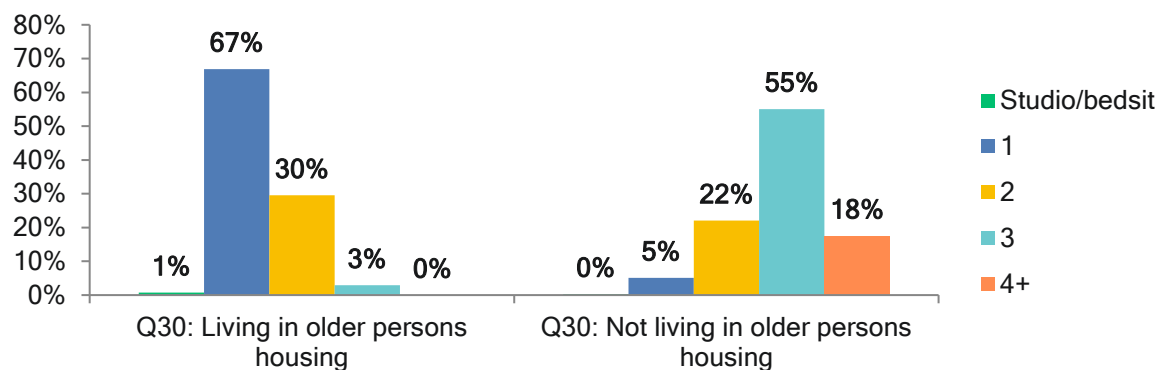


Number of bedrooms

- 5.23 Among residents in older persons' accommodation, the majority live in smaller properties, with 67% residing in one-bedroom homes and 30% in two-bedroom homes. Only a small proportion (3%) live in three-bedroom homes, and virtually none reported having four or more bedrooms. Just 1% said they lived in a studio or bedsit.

- 5.24 In contrast, respondents not living in older persons' housing are far more likely to occupy larger homes. Over half (55%) live in three-bedroom homes, followed by 22% in two-bedroom properties and 18% in homes with four or more bedrooms. Only 5% live in one-bedroom properties, and no respondents reported living in studios or bedsits.

Figure 17. Number of bedrooms comparing responses from people living and not living in older persons' housing



Qualitative research participant demographics

- 5.25 The qualitative research engaged with 100 people with lived experience across Caerphilly County Borough.
- 5.26 Research participants were primarily aged between 50 and 100, with the majority in the older age brackets. Women form a larger proportion of the research participants, especially in groups like Woodfield Side Senior Citizens Group and Elderberries, though some groups, such as the Men's Shed, are predominantly male.
- 5.27 The housing tenure of research participants varies; some groups consist entirely of social renters (e.g. CCBC tenants), others are mainly homeowners (e.g. over 50s forum and Men's Shed), while some include a mix of both, such as Woodfield Side and Elderberries.
- 5.28 The qualitative research participants who are homeowners tend to live in larger properties (3-4 bedroom) and have lived in them for long periods of time (20 years+).
- 5.29 Overall, the participants represent a diverse mix of older people from social housing and homeowner backgrounds, with women forming the largest demographic.

Table 16. Qualitative research demographics

Group	No. of people	Age range	Sex	Tenure
CCBC Sheltered Housing Tenants - Gwyddon Court and The Ranks - Waunrhydd - Grove 2	25	55-100	20 women 5 men	All social rent and one private renter at one session
CCBC General Needs Tenants	10	55-75	7 women 3 men	All social rent
Caerphilly over 50s forum at Moose Hall, Blackwood	7	50-80	4 women 3 men	6 homeowners and 1 sheltered housing
Elderberries at Caerphilly Miners Centre	10	70-80	All women	Mainly homeowners some social renters in older persons' accommodation
Men's Shed at Caerphilly Miners Centre	8	55-85	7 men 1 woman	All homeowners
Woodfield Side Senior Citizens Group	30	55-100	30 women	c.20 – homeowners c.10 – social renters
Cefn Fforest Community Centre Coffee morning	10	54-75	10 women	3 – homeowners 7 – social renters
Total	100			

Primary research key findings

Older people's interest in and likelihood of rightsizing/moving in later life

5.30 The evidence from the research indicates that older people's interest in and likelihood of rightsizing/moving in later life is nuanced. In general, the evidence suggests that the majority of participants are seeking to remain living independently in their existing homes for as long as possible, however there are a range of factors and characteristics that determine older people's interest in and likelihood of moving.

Impact of living in older persons' housing and not living in older persons' housing on interest and likelihood of rightsizing/moving in later life

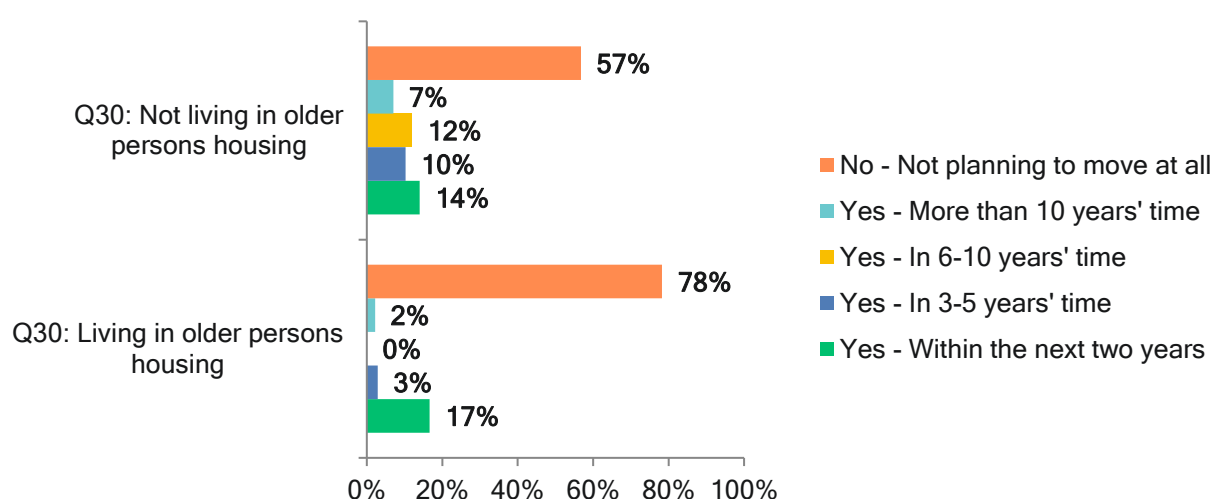
5.31 The survey evidence has been analysed to highlight the difference between the interest and likelihood of moving in later life between people living in ordinary homes compared with those living in older persons' housing. This indicates that people already living in older persons' housing are less likely to consider moving than those living in ordinary homes.

5.32 A significant majority (78%) of survey respondents already living in older persons' housing stated they are not planning to move at all. The evidence from the qualitative research indicates

that most people living in retirement/sheltered housing tend to appreciate the sense of community and staff support they receive and as such would not want to move.

- 5.33 However, a proportion (17%) of survey respondents already living in older persons' housing indicate they are likely to move within the next two years. The qualitative research highlighted a range of factors that may influence this. For some people, the quality and accessibility of their existing older persons' housing is a driving factor as it doesn't suit their mobility needs. For others, particularly younger residents, retirement/sheltered housing wasn't their preferred choice, but they felt they had no other option as an older person as there are limited accessible ordinary housing options for older people.
- 5.34 Among survey respondents not currently living in older persons' housing, the likelihood of moving is more mixed. While nearly 60% indicate they are not planning to move, nearly 40% indicate that they are likely to move in the future. The majority of older people who indicate they are likely to move state that they are likely to do so in the shorter term, with fewer indicating they are likely to move in more than 10 years' time. This indicates that there is a proportion of people living in ordinary homes who are likely to be seeking different accommodation in the future whose housing preferences should be considered (see Figure 18).

Figure 18. Survey respondents' interest in and likelihood of moving in later life comparing responses from people living in and not living in older persons' housing

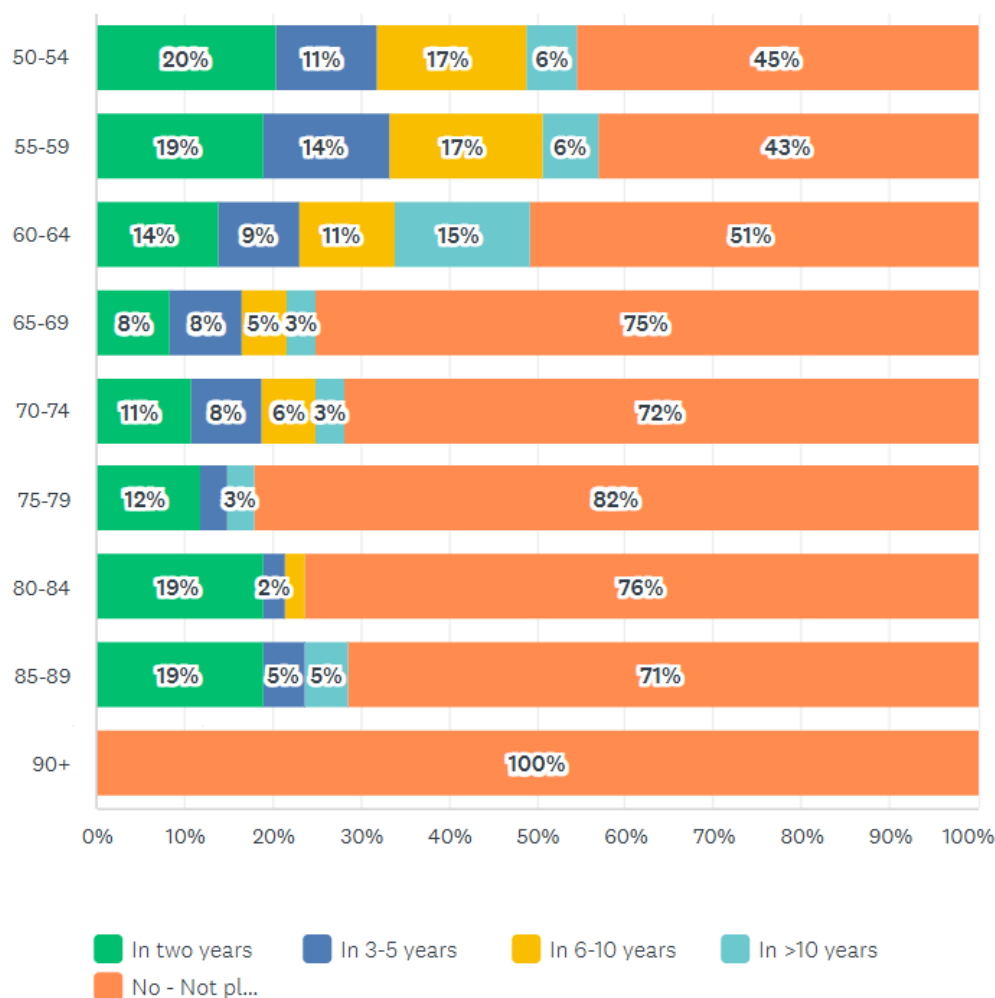


Impact of age on interest and likelihood of rightsizing/moving in later life

- 5.35 The evidence from the research indicates that age has an impact on interest and likelihood of moving in later life; the 'younger' old age groups tend to indicate a greater interest and likelihood of moving compared to the 'older' old age groups.
- 5.36 When examining all survey responses (Figure 19), 'younger' old respondents (aged 50–64) are more likely to move, on average 53% indicate that they are likely to move in the future compared with on average 20% of people over the age of 65. For people aged 50–59, the likelihood of moving is slightly skewed toward the shorter term (especially compared to older groups), though there is still a meaningful portion considering longer-term moves. For people aged 60–64, the pattern becomes more mixed, with interest spread across both shorter and longer term.

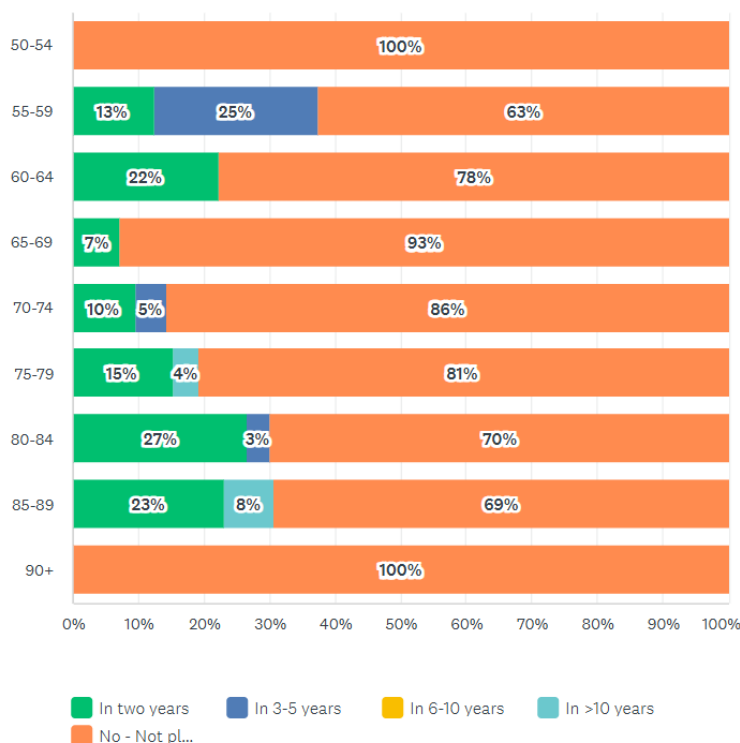
- 5.37 From age 65 onwards, the interest and likelihood of moving declines sharply. On average 75% of people aged 65-89 say they are not planning to move at all. For example, 75% of people aged 65-69 and 82% of those aged 75-79 say they are not planning to move at all. This trend continues with older age groups, where the vast majority prefer to remain in their current homes.

Figure 19. Survey respondents' interest in and likelihood of moving in later life by age group (all respondents)



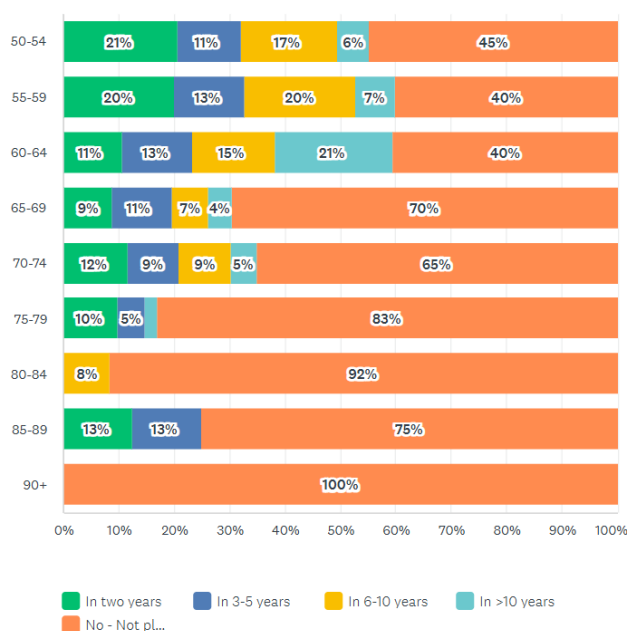
- 5.38 To further support the evidence from the research that suggests that the 'younger' old are more likely to move, the responses from people living in and not living in older persons' housing have been compared.
- 5.39 Survey respondents currently living in older persons' housing (see Figure 20) show a strong preference to remain where they are, the vast majority in all age categories state they are not planning to move. There is some evidence that survey participants that are 'younger' (55-64) and much 'older' (80-89) in this housing type state they are likely to move in the shorter term. The qualitative evidence indicates that people in the 'older' age group are more likely to consider that existing older persons' housing does not suit their age-related health needs and they may need a more supportive setting. Those in the 'younger' age group indicate that moving to sheltered housing wasn't initially their preference but they were looking for a smaller, more manageable home and therefore are seeking a more accessible general needs property.

Figure 20. Impact of age on interest and likelihood of moving for people living in older persons' housing



5.40 In contrast, survey respondents not currently living in older persons' housing (Figure 21) show significantly more interest in moving especially before the age of 65, on average 60% of respondents aged 50-64 indicating they are likely to move. Whilst the 'older' old age groups indicate they are less likely to move, it should be noted that the survey received less responses from these age groups. However, the qualitative research engaged with this age group and indicated that people aged 70+ were far less likely to move than the younger age groups.

Figure 21. Impact of age on interest and likelihood of moving for people not living in older persons' housing



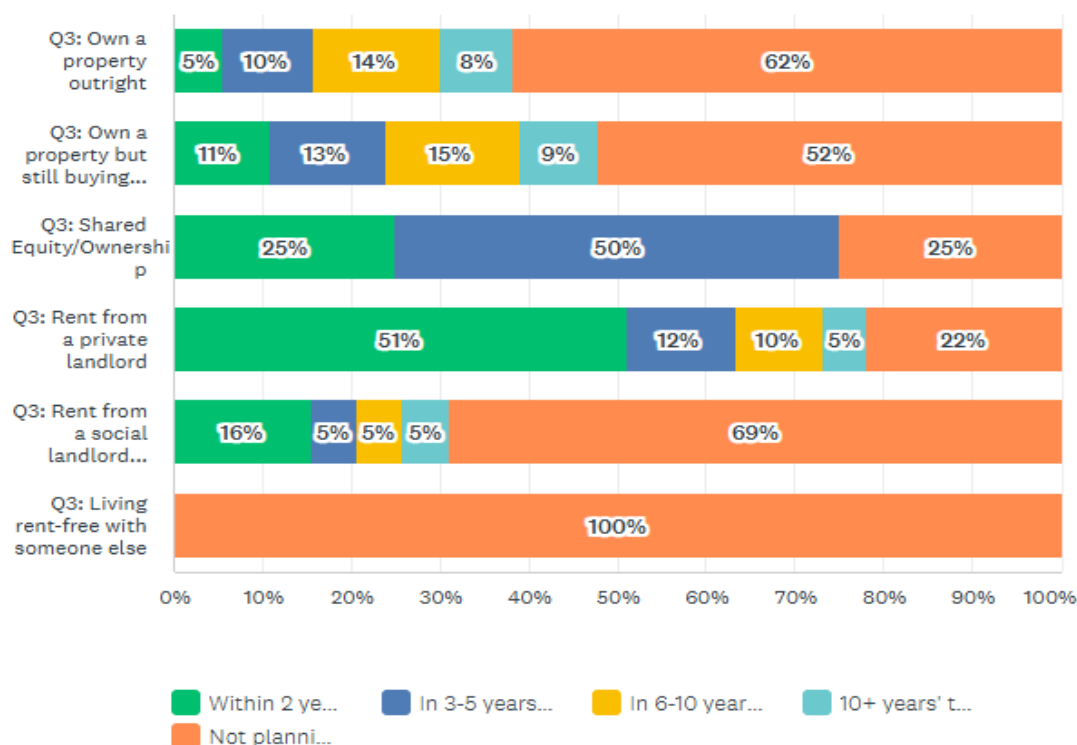
- 5.41 The qualitative evidence supports this trend as ‘younger’ old participants were more likely to be considering a move than ‘older’ old participants. The research highlighted that the ‘younger’ old are more likely to consider moving for lifestyle reasons (such as children moving out, locational preferences, reducing costs), while ‘older’ old participants are more likely to move only when forced by health circumstances.
- 5.42 This indicates that the willingness to consider moving in later life significantly decreases with age, making early engagement and tailored housing options for younger older adults (50–64) key to supporting timely and suitable housing transitions.
- 5.43 Simultaneously, the qualitative research indicated that there is a gap in housing options for the ‘younger’ old who want to move, but do not need or want specialist housing. This group is underserved by the current housing stock, which tends to focus on either large family homes or specialist accommodation. This indicates that there is scope to improve the range of housing options that are suited to the needs of the ‘younger’ old and enables them to age in place. (See section ‘What encourages/influences older people to rightsize/move in later life’ and ‘Preferences and priorities of a new home’ for more details on what influences a move and preferences for a new home.)
- 5.44 The qualitative research highlighted that older people, but particularly the ‘older’ old are seeking support to remain living in their existing homes as independently as possible as this is their preference choice. ‘Older’ old participants had slightly stronger ties to their homes having lived in them for longer and also being less likely to have moved multiple times in their lives. Older people are seeking support with accessing and financing aids/adaptations as well as support with accessing support/care.

Impact of tenure on interest and likelihood of rightsizing/moving

- 5.45 The evidence from the research has been analysed to highlight the impact of tenure status on participants’ interest and likelihood of moving in later life. For this analysis the evidence from people not living in older persons’ housing has been analysed on its own as it is this group that are most likely to indicate interest in moving.
- 5.46 The survey indicated that interest and likelihood of moving can vary significantly by tenure status. It suggests that respondents not living in older persons’ housing who rent from a social landlord or own their home outright or with a mortgage are less interested in moving than respondents who are privately renting or own their home via shared ownership (see Figure 22).
- 5.47 Whilst most owner-occupiers are not planning to move, there is a sizable proportion who state they are likely to move: c.40% of respondents who own their property outright and c.50% of respondents who own their property with a mortgage indicate that they are likely to move. The timeframe when owner-occupiers are likely to move is mixed but this tends to be in the longer term.
- 5.48 The qualitative research indicates that participants who are homeowners are more likely to have lived in their homes for longer periods of time and therefore have strong ties to their existing homes, which make them less likely to consider a move, particularly those in the older age groups.
- 5.49 Whilst most respondents who rent from a social landlord are not planning to move, c.30% are likely to move, and people tend to be more likely to move in the shorter term (within two years).

- 5.50 Respondents who rent from private landlords are highly likely to consider moving, with 51% planning to move within the next two years, and just 22% not planning to move. The evidence from the qualitative research highlights insecurity of tenure within private rented accommodation as well as dissatisfaction with the home that is likely to be driving the likelihood of moving amongst people in this tenure.
- 5.51 Respondents who own their homes via shared ownership indicate the most mixed views, however the number of respondents is too small for this data to be statistically significant so this has not been considered.

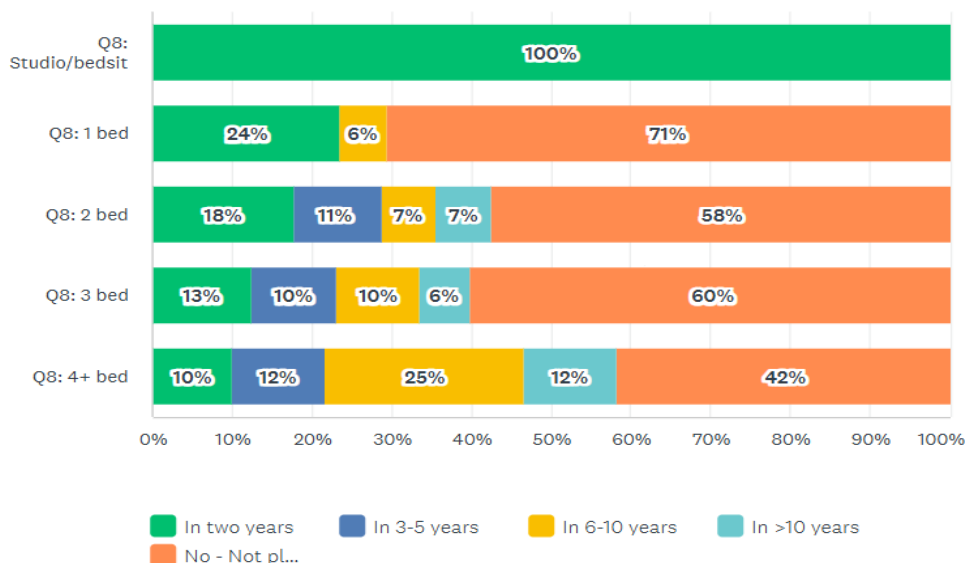
Figure 22. Likelihood of moving home amongst survey respondents not living in older persons' housing by tenure status



Impact of number of bedrooms on interest and likelihood of moving in later life

- 5.52 The evidence from the research has been analysed to highlight the impact of the number of bedrooms a participant has on interest and likelihood of moving in later life. For this analysis the evidence from people not living in older persons' housing has been analysed on its own.
- 5.53 The survey data indicates that the survey respondents living in four-bedroom homes are the most likely to move home, with 58% of respondents likely to move home. A significant minority (c.40%) of survey respondents with three-bedroom homes also indicate they are likely to move home.
- 5.54 The qualitative research indicated that for older people with larger homes (3-4 bedrooms) a driving factor that would influence them to move home is moving to a smaller home that is more manageable than their existing larger property. However, it is important to note that many qualitative research participants would be seeking a smaller 'ordinary' home rather than a move to specialist accommodation that provides a smaller property (see section 'Interest in housing with an age criteria (e.g. 55 or 60+)') for more analysis of this).

Figure 23. Likelihood of moving home amongst survey respondents not living in older persons' housing by number of bedrooms



What encourages/influences older people to rightsize/move in later life

- 5.55 The evidence from the research has been analysed to indicate what encourages/influences older people to move in later life. For this analysis the evidence from people living in older persons' housing and not living in older persons' housing has been compared.
- 5.56 In relation to older people not currently living in older persons' housing, there are a range of factors that may potentially influence people to move in later life.
- 5.57 Moving to a smaller home is an influencing factor for nearly 40% of these survey respondents. The qualitative research indicates that people not living in older persons' housing tend to be living in larger 3 or 4 bed houses and if they were to move, moving to a smaller home would be an influencing factor. This is largely driven by a desire to live in a home that is easier to clean and maintain as well as to live in a home that has reduced running costs. This is supported by the survey, which found that 45% of respondents would be influenced by a home that is easier to maintain. However, the qualitative research highlighted that it is still important that a smaller home is spacious, accessible and is designed to enable people to 'age in place'.
- 5.58 Another factor that is most likely to influence respondents not living in older persons' housing to move is a home that has good access to parking; this is important to 40% of respondents. The evidence from the qualitative research indicates that many older people are hesitant to relinquish their car, as they value the independence it provides. Car ownership is particularly important in rural areas where public transport is limited. This indicates that homes designed for people in later life should consider car parking provision if they want to attract a wide range of older people to move.
- 5.59 At the same time, 30% of survey respondents indicated that they may be influenced to move to have better access to amenities. The qualitative research suggested that although most people would prefer public transport to be improved, there is a proportion of people that would consider moving to have better access to services.
- 5.60 A move to a cheaper home would influence 30% of survey respondents to move. This is not surprising given that c.40% of survey respondents state that it costs a lot to run the heating and/or hot water in their existing homes. The research suggests that many older people find

running costs of their home a challenge. The qualitative research indicated that some people would be motivated by a move to a home with cheaper running costs but that they need support to understand the potential savings associated with a new home. People also want to understand the financial implications of moving home and support with this would potentially influence more people to move.

- 5.61 The survey indicates that respondents who don't live in older persons' housing are unlikely to be influenced by a move to a home where there is care and support (7%) or staff on site (5%) or where there is an age criteria (20%). This is supported by the qualitative research, which indicated that the vast majority of older people are not motivated by a move to specialist housing. This is explored more in the section 'Interest in housing with an age criteria (e.g. 55 or 60+)', but in part this is because people have negative perceptions of older persons' housing and associate it with a care home. This is also influenced by cost and also a desire to remain living in a mixed-age community. More people would potentially consider a move to older persons' housing if it provided an affordable and aspirational housing offer that didn't make people feel they were moving for 'care' reasons or because they are getting 'older'.
- 5.62 On the other hand, the factors that influenced people who currently live in older persons' housing to move are quite different. The qualitative research indicated that for these individuals, a move to older persons' housing was influenced by the desire to live in a supportive community with access to staff presence and social activities. The survey supports this, as 39% moved to live where there was an age criteria and 33% because there were staff on site.

Table 17. Factors that influenced/influence a move in later life, comparing survey responses from older people that are and are not living in older persons' housing

Factors that influenced/influence a move	Responses from people living in older persons' housing		Responses from people <u>not</u> living in older persons' housing	
A smaller home	9%	11	39%	116
A home that is easier to clean and/or maintain	16%	20	45%	132
A cheaper home (e.g. more affordable mortgage or rent or cheaper running costs)	16%	19	35%	103
To be closer to family or caregivers	29%	35	22%	66
A more accessible home	20%	25	36%	107
A better or safer neighbourhood	11%	13	18%	54
A home where there is an age criteria to move in (e.g. 55+ or 60+)	39%	48	20%	59
A home where there is specialised care and support available on site	29%	35	7%	22
A home with better access to public transport, shops, health services and amenities	30%	37	31%	91
A home where there are staff available on site	33%	40	5%	16
To be able to live with family or extended family members	10%	12	7%	22
A home with access to good parking	24%	29	40%	26
Other (please specify)	10%	12	9%	26

Source: CCBC and HLIN Older Persons Housing Survey (2025)

- 5.63 The qualitative research indicated that the term 'rightsizing' is not widely understood by research participants and is mainly a professionalised term. As such it is recommended that

the term ‘rightsizing’ should be avoided in marketing that is focused on encouraging people to move in later life.

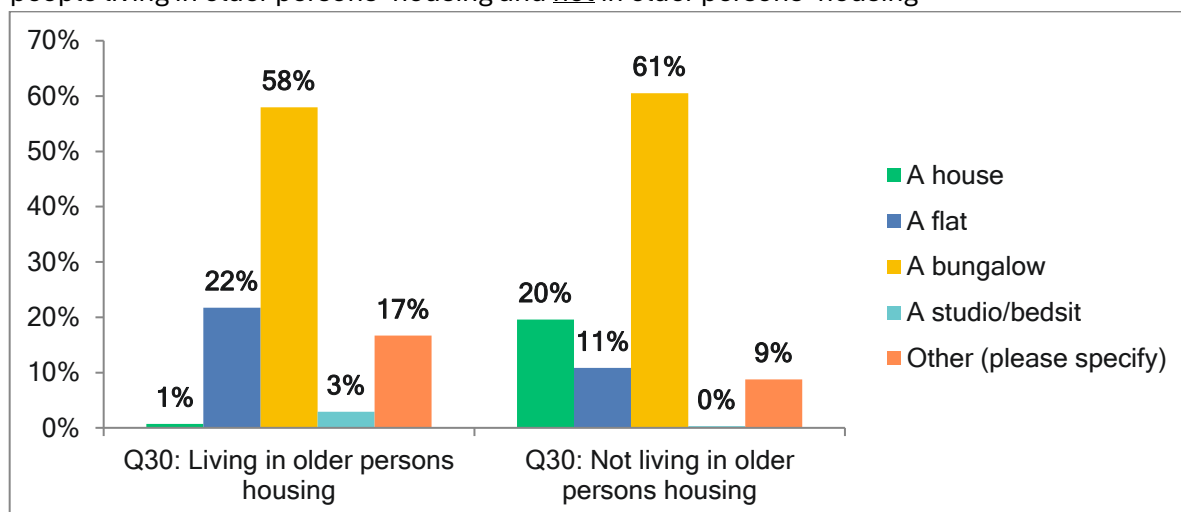
- 5.64 Most people are familiar with the term ‘downsizing’, but there are mixed views on this terminology. Some people readily use the term to describe their recent move into a smaller home in later life. However, many research participants dislike the term because it implies giving up, or losing independence, rather than making a positive change.
- 5.65 Therefore, the evidence indicates that to encourage older people to move in later life it is important to use language that feels positive, empowering, and focused on their lifestyle goals rather than on giving things up. Terms should emphasise choice, comfort, and future benefits, such as “finding a home that suits your life now”, “making life easier”, or “planning for the future”. Messaging should highlight what matters most to people—such as having more time for hobbies, being closer to family, or living in a space that’s easier to maintain—rather than implying loss or reduction. Using aspirational language that frames the move as an opportunity for freedom, convenience and enjoyment helps make it feel like a proactive, positive step rather than a necessity.
- 5.66 Further factors that influence a move are also provided in the sections below.

Preferences and priorities of a new home

Type of home

- 5.67 The evidence from the research indicates a strong preference for bungalows (see Figure 24). Older people are attracted to bungalows as they are smaller and easier to maintain, all on one level and tend to be detached from other houses. Many people are concerned about the potential noise from neighbours and accessibility issues that may come with living in a flat.
- 5.68 The evidence from the qualitative research indicated that whilst bungalows are the preference, people are seeking a range of housing options in later life and would be interested in smaller houses, spacious apartments or less ‘land-hungry’ bungalows. The evidence suggests that more people would consider moving to a flat if it provided an attractive, affordable and accessible home. The term ‘flat’ carries negative associations and people tend to state that the term ‘apartment’ would be more likely to attract them to move. People would be seeking apartments with balconies, design considerations that mitigate noise from neighbours and ventilation, as well as the provision of lifts. In addition, low-rise accommodation is preferred as it is better suited to the Caerphilly County Borough topography than high-rise.

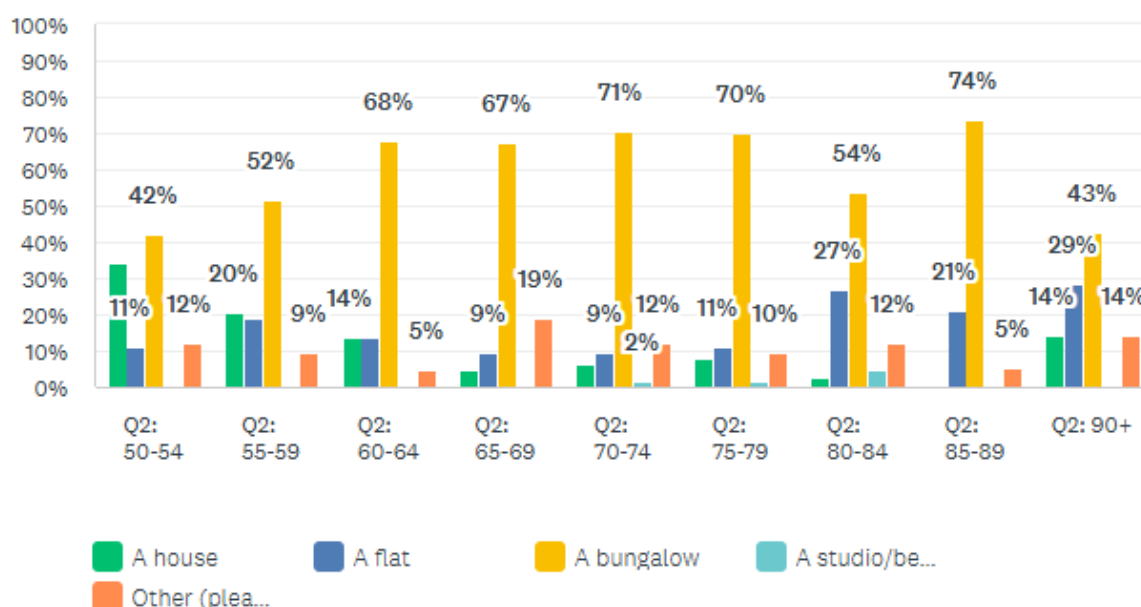
Figure 24. The type of home that survey respondents would prefer, comparing responses from people living in older persons' housing and not in older persons' housing



N.B: The survey responses for 'other' are where people have provided multiple answers to a question requiring one answer.

- 5.69 The evidence from the research is that the 'younger' old (50-64) are more likely to consider living in a house and less likely to consider moving to a bungalow if they were to move than the 'older' old, Figure 25 below highlights this finding. This highlights that a range of housing types are needed to attract a wider range of older people to consider moving in later life.

Figure 25. The type of home that survey respondents would prefer, comparing responses by age group

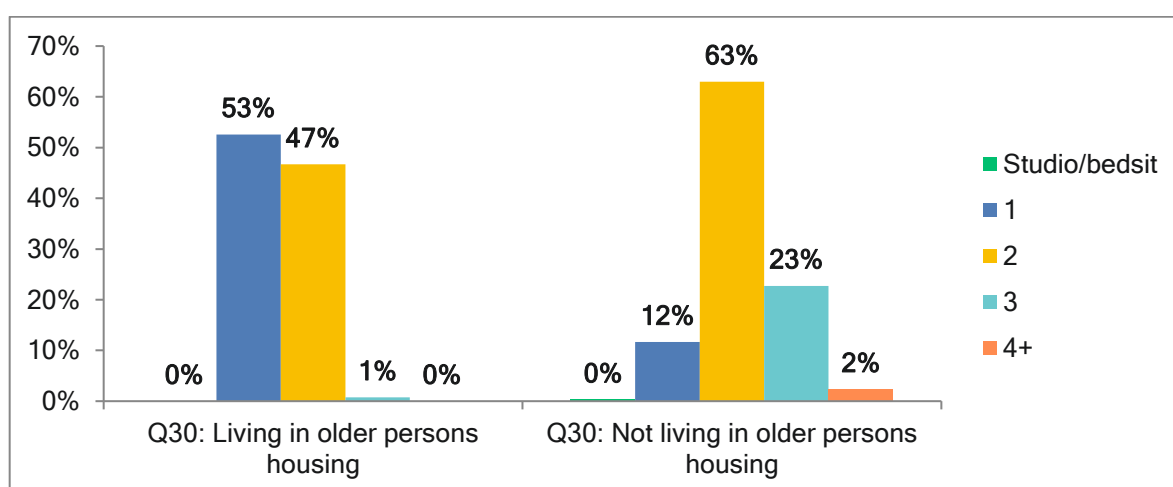


Number of bedrooms

- 5.70 The evidence from the research indicates that the majority of participants would be seeking a home with two bedrooms if they were to move. However, the preferred number of bedrooms in a future home varies slightly between those living in older persons' housing and those who are not.

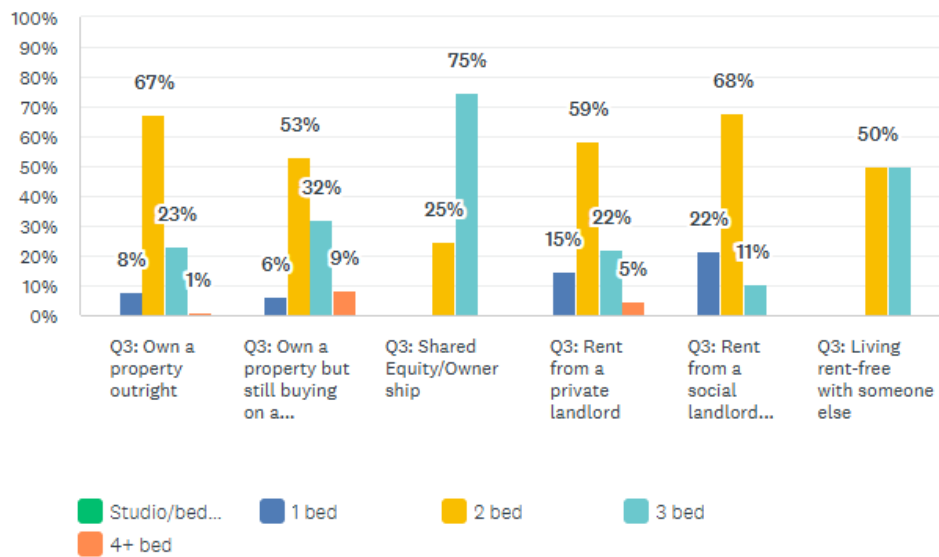
- 5.71 Among survey respondents living in older persons' housing, 53% expect one-bedroom homes and 47% would expect two-bedroom options. In contrast, survey respondents not living in older persons' housing show a clear expectation for two-bedroom homes (63%), with 23% expectating three-bedroom homes and only 12% choosing one-bedroom properties. A small proportion (2%) are interested in 4+ bedrooms (see Figure 26).
- 5.72 The preference for two-bedroom homes is driven by a range of reasons, such as needing a spare bedroom for guests, partners that need to sleep separately for health reasons, space for hobbies and storage.
- 5.73 This indicates that to attract people to move home in later life, a range of homes should be provided with a mix of one and two bedrooms.

Figure 26. The number of bedrooms that survey respondents would prefer, comparing responses from people living in older persons' housing and not in older persons' housing



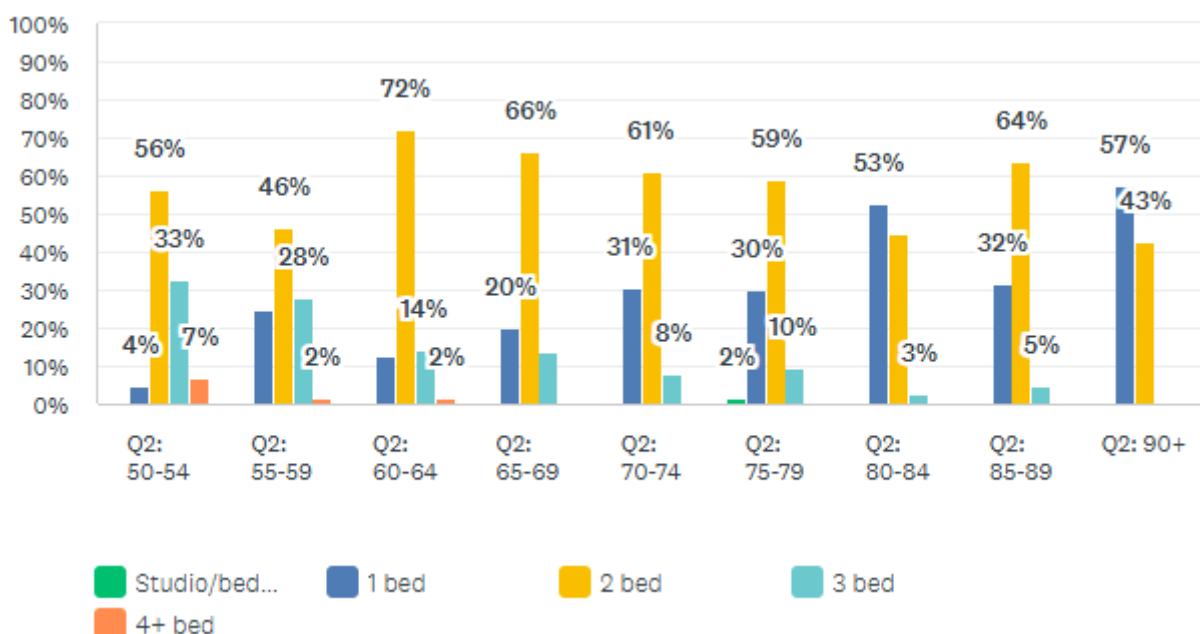
- 5.74 The research indicates that tenure status has an impact on the number of bedrooms that older people would expect. Survey respondents who rent their homes are more likely to expect a one-bedroom home than people who own their own homes. The qualitative research suggested that homeowners would be more likely to want two-bedroom homes as they require extra space for storage (see Figure 27).
- 5.75 This indicates that homes provided in the social housing sector could provide a smaller number of rooms than those on the open market. In order to attract homeowners to move, two-bedroom homes should be provided as a minimum.

Figure 27. The number of bedrooms that survey respondents would expect, comparing tenure



5.76 When comparing the expectations on the number of bedrooms by age, the survey data indicates that the 'younger' old are more likely to be expecting a larger number of bedrooms than the 'older' old. This suggests that a range of house sizes are needed to attract the widest range of older people to move home. Given that the 'younger' old are more likely to move, the evidence would suggest that smaller two-bedroom homes that support people to age in place should be provided to encourage this group of people to move.

Figure 28. The number of bedrooms that survey respondents would expect, comparing age group

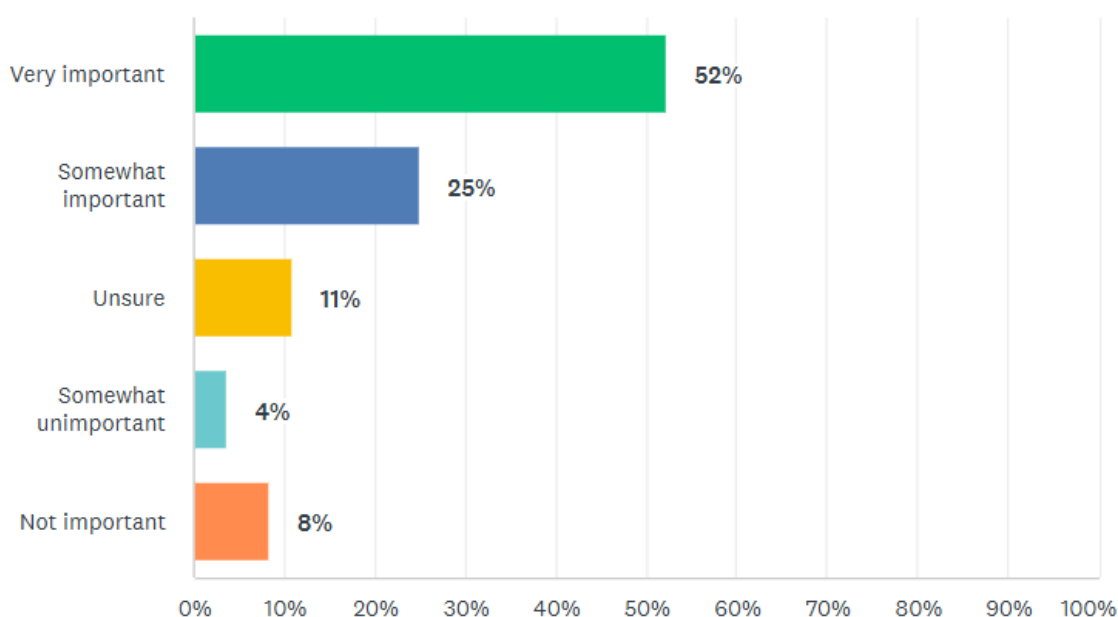


Location

5.77 The evidence from the research is that the location of a home is extremely important when considering a home in later life.

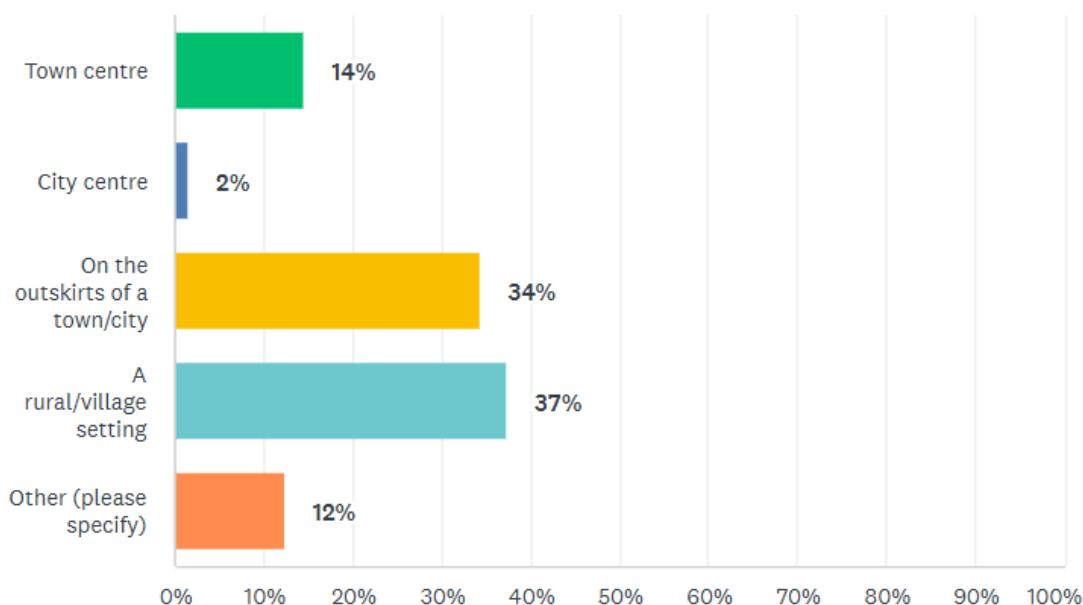
- 5.78 The survey responses highlight a clear preference for remaining within the local community (c.75%), with 52% of respondents stating that remaining in their local community in later life is “very important” and 25% considering it “somewhat important”.
- 5.79 The evidence from the qualitative research also indicated a strong significance is placed on the importance of remaining in the local community in later life. The research highlighted that Caerphilly County Borough residents tend to have very strong ties to their local community. Many people have lived in the same neighbourhood for most of their lives and also have longstanding family ties to their neighbourhoods and local community, which means that they want to remain living there. Remaining in their local community is even more important in later life as it feels familiar and people have existing support and social networks that they want to maintain.

Figure 29. Survey respondents’ view of importance of remaining in their local community



- 5.80 The research indicated a strong preference for living in more rural rather than urban areas in later life. Amongst survey respondents, c.40% would prefer a rural or village setting with c.35% preferring being on the outskirts of a town or city. A minority of respondents would prefer to live in a town (14%) or city (2%).
- 5.81 The qualitative research indicated that many participants currently lived in more rural settings and want to remain living in those communities. There was some evidence of interest in moving closer to town centres in later life to be closer to shops, amenities and public transport. However, people tend to want to see an improvement in public transport options that enables them to live in their existing homes rather than to have to move in later life.

Figure 30. Survey respondents' preferred locations for future housing



- 5.82 The qualitative research also indicated that Caerphilly County Borough's topography is characterised by features that can make it difficult for older people to be mobile and access services. Steep gradients can make walking difficult for those with reduced mobility or who use mobility aids. Pavements and roads on hills can pose trip and fall risks or limit outdoor activity. This makes proximity to amenities (shops, health services, bus stops) far more important to people when considering a new home.
- 5.83 The implication is that new housing for older people needs to be on flatter ground, ideally close to town centres to ensure people can still access services.

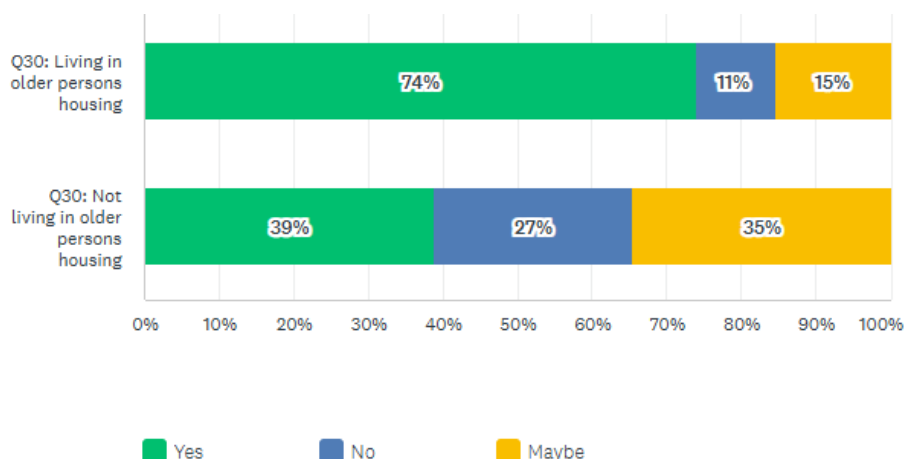
Interest in housing with an age criteria (e.g. 55 or 60+)

- 5.84 The evidence from the research indicated mixed views on the interest in living in housing with an age criteria such as retirement/sheltered housing or extra care housing.
- 5.85 The evidence from the survey suggests that there is potentially a large proportion of people who would consider moving to housing with a minimum age criteria if they were to move. Nearly 75% of people not living in older persons' housing indicate that they would consider a move to this type of housing, with 39% saying 'yes' and 34% saying 'maybe'. This is a significantly higher interest in moving to homes with an age criteria compared to research that the Housing LIN has undertaken elsewhere in the UK and Wales.
- 5.86 On the other hand, the evidence from the qualitative research indicates that a move to housing with an age criteria is not the preferred option for the vast majority of people not currently living in older persons' housing. The evidence suggests that the vast majority of people not currently living in older persons' housing would be seeking another 'ordinary' home if they were to move rather than 'specialist' accommodation with an age criteria. The evidence indicated a preference for mixed-age communities, even where people were interested in living in housing with an age criteria.
- 5.87 The qualitative research indicates that people consider that older persons' housing such as retirement/sheltered housing or extra care housing is a 'good idea' but 'for someone else'.

People tend to only think that they might need this type of accommodation when they have a health need, are struggling physically or after the death of a partner, rather than moving in before they ‘need’ it.

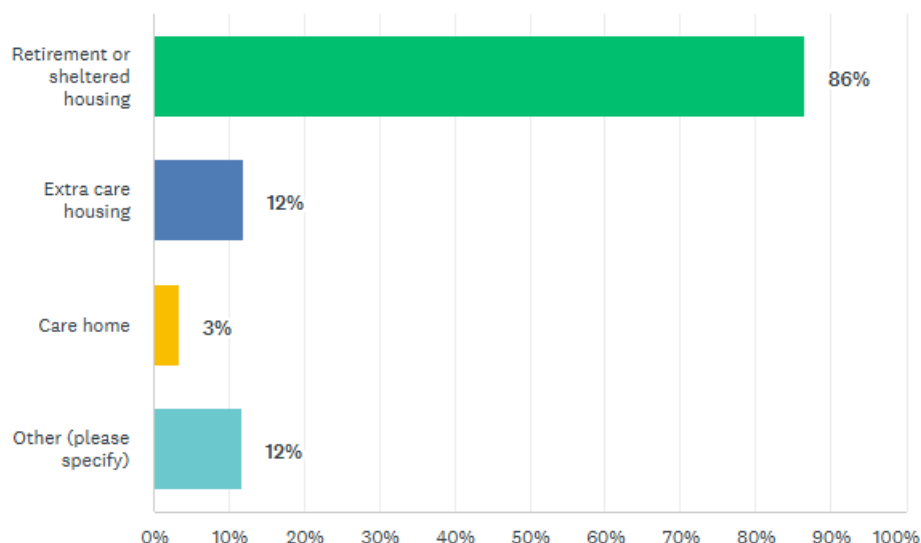
- 5.88 The evidence suggests that more people might consider a move to older persons’ housing if it provided an affordable and aspirational housing offer. This would help to change people’s negative perception of older persons’ housing as people currently associate it with dated sheltered housing or an institutional looking care home. The evidence suggests that contemporary older persons’ housing should be marketed as a ‘lifestyle’ offer to attract people to consider this housing type.
- 5.89 The survey evidence suggests that people already living in older persons’ housing are more likely to consider living in housing with an age criteria than those not living in older persons’ housing. The qualitative research indicated that moving to housing with an age criteria was a driver for some people to move into older persons’ housing.

Figure 31. Survey respondents’ interest in living in housing with an age criteria, comparing responses from people living in older persons’ housing and not living in older persons’ housing



- 5.90 The evidence from the survey indicates that of those interested in moving to housing with an age criteria, the vast majority (86%) are interested in ‘retirement housing’ with only a minority interested in extra care housing (12%). The qualitative evidence indicated that older people are less familiar with extra care housing or consider it to be a ‘care home’ which isn’t a housing type that the vast majority of people want to move to. Some older people expressed interest in a ‘retirement village’ as they see this as a more positive move than a move to ‘extra care housing’. Retirement housing or retirement villages are seen as a choice for people who are still active and independent, whereas extra care housing suggests health decline or dependency.

Figure 32. The type of housing with an age criteria that survey respondents are interested in



5.91 The evidence from the research indicated that people consider the following as essential features of retirement housing:

- A scheme manager available on site complemented with technology that provides support just in case. The ‘younger’ old are also more interested in Wi-Fi provision across the site.
- Vibrant and attractive communal space that has a hotel-like feel that encourages people to use it in an ‘organic way’. This means people would naturally stop and sit in the communal areas rather than having to go there, this tends to be located closer to the entrance. It is also important that not too much communal space is provided, to keep the costs down.
- Accessible homes that support people to ‘age in place’. Key features include a wet room, accessible kitchens, wider doors/corridors, spacious homes for mobility, a lift.
- Natural light and ventilation throughout.
- A mix of one and two-bedroom homes.
- A guest room for family to stay, particularly if only one-bedroom homes are provided.
- Good parking provision and access to public transport, shops and amenities.

5.92 The evidence from the research highlighted that although most people are not aware of extra care housing, they consider it to be a more attractive housing option than a care home and see the value in this type of housing. Having self-contained accommodation alongside 24/7 care and support is considered an important feature of extra care housing.

Tenure preferences

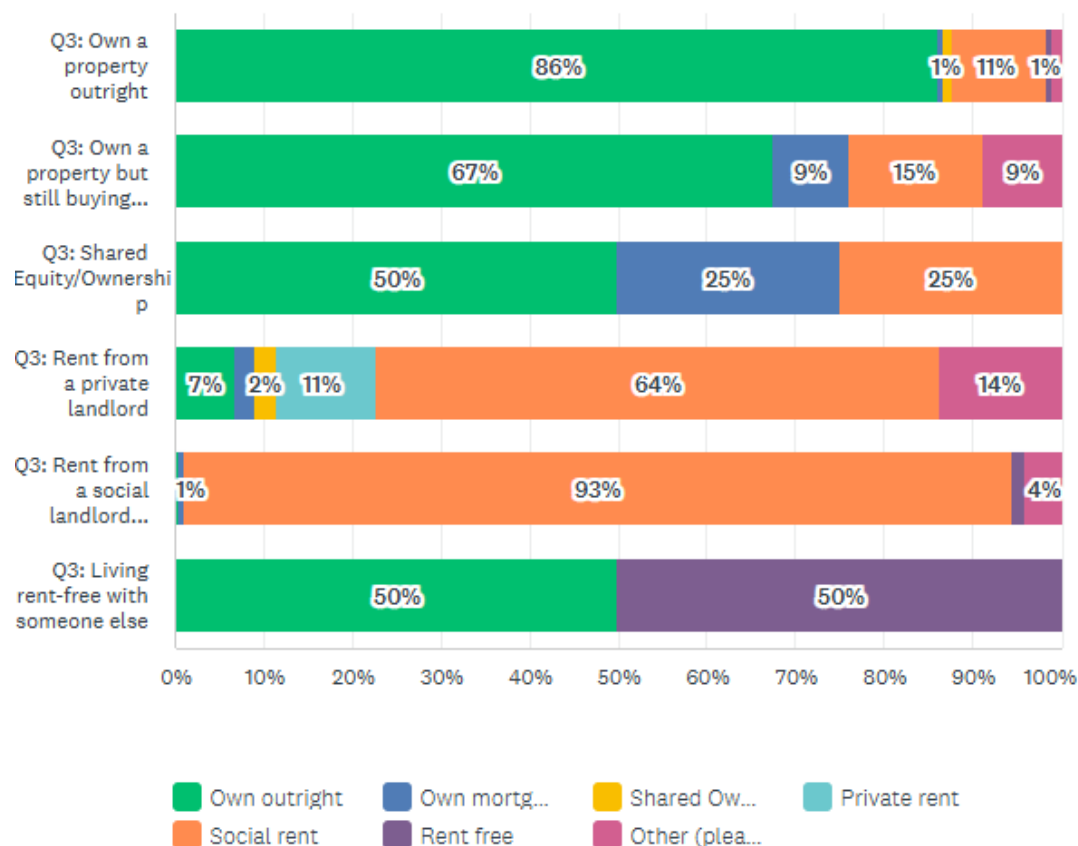
5.93 The evidence from the research indicates that the tenure status of respondents has an impact on their expected tenure status of a new home if they were to move.

5.94 The survey evidence indicates that, in general, respondents that are homeowners (outright and with a mortgage) would expect to purchase a home outright if they were to move. However, there is a proportion of homeowners that would expect to rent their home from a social landlord

if they were to move home. 15% of homeowners with a mortgage and 11% of homeowners who own their home outright would expect to rent from a social landlord if they were to move home.

- 5.95 The qualitative evidence indicates that amongst homeowners, homeownership is important to people as a home is typically considered to be an asset that represents long-term wealth and financial stability. Many older homeowners feel that they need to retain their homes as it may be needed to pay for their or a partner's care/support in later life. However, there are mixed views on the 'fairness' of this, some people don't think it is fair that they should have to pay for this care/support whilst others consider that if you have the means you should pay for your care/support needs. At the same time, some older people feel that they need to retain their homeownership status as they want to pass the wealth from the asset on to their families.
- 5.96 On the other hand, there is evidence from some homeowners that they expect to rent from a social landlord if they were to move. This preference is often driven by financial and practical factors, including the possibility that the value of their existing home would not cover the cost of purchasing a new one, an interest in releasing equity to support other expenses, and the appeal of lower ongoing housing costs associated with renting from a social landlord.
- 5.97 There is also a strong desire amongst survey respondents who currently privately rent their homes to change their tenure status if they move. The majority (65%) would be seeking to rent a home from a social landlord, whilst a minority (c.10%) would be interested in owning a home if they were to move. The evidence from the qualitative research suggests that older private renters tend to be concerned about the security of tenure within the private rented sector as well as the ability to access aids and adaptations to the home in later life.
- 5.98 The survey data on respondents that own a home via shared ownership or live rent free with someone else doesn't have enough responses to make this evidence reliable. The qualitative research didn't engage with people in this tenure type.

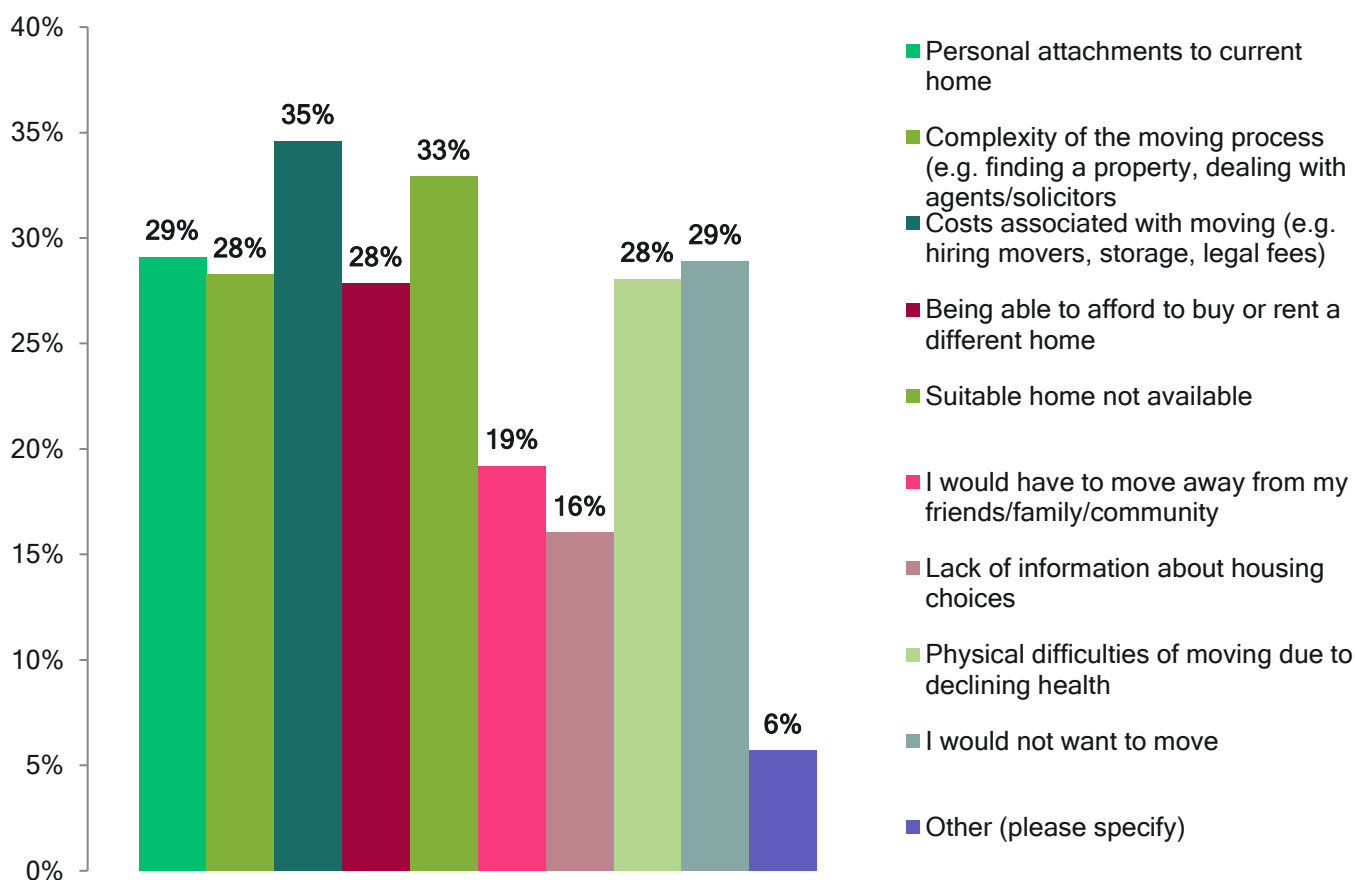
Figure 33. Tenure that survey respondents would expect from a new home if they were to move, by tenure status



Barriers preventing people from moving/rightsizing in later life and how they can be overcome

5.99 The evidence from the research indicated that the barriers to moving in later life are not isolated but interlinked, with financial, emotional, practical and social factors intersecting in ways that collectively shape decision making (see table below).

Figure 34. Barriers preventing survey respondents from moving in later life



Financial barriers

- 5.100 There are a range of financial barriers that prevent older people from moving in later life. The survey indicates that 35% of respondents consider the costs associated with moving to be a barrier. In the qualitative research this is expressed as the cost of legal fees, stamp duty and potential capital gains tax implications. There are also costs associated with the moving process itself which people are concerned about affording, such as hiring moving vans, storage and decorating a new home.
- 5.101 The evidence suggests that help with the cost of moving would make it more likely for people to decide to move, with c.60% of survey respondents stating this. This indicates that financial incentives can encourage people to move. However, the qualitative research indicates that the emotional support that people need alongside this shouldn't be underestimated and needs to be provided alongside financial support.
- 5.102 The evidence also suggests that a barrier to moving is the cost of alternative accommodation. For 28% of survey respondents, being able to afford to buy or rent a different home is a barrier. The qualitative research indicates that the majority of participants who are homeowners are concerned about the cost of housing and whether they could afford to purchase a new home. Bungalows are a preference of most people, but they tend to be unaffordable as there is such a high demand. This indicates that there is a need for affordable mainstream homes that are smaller and meet the preferences of older people listed above in 'What encourages/influences older people to rightsize/move in later life' and 'Preferences and priorities of a new home'.

- 5.103 When considering a move to older persons' housing, the research indicates that a gap in affordable older persons' housing prevents older people from considering this option. Participants are concerned about the cost of current and ongoing service charges as well as whether they could afford the cost of the home itself. A barrier for some people considering purchasing older persons' housing is whether these homes retain their value on future sale.

Emotional and physical barriers

- 5.104 The qualitative evidence highlighted that older people have been living in their existing homes for many years (20 years+) and as such have strong emotional attachments to their homes and household items/belongings. For nearly 30% of survey respondents, their personal attachment to their current home is a barrier to moving. This means that for most people, the moving process is seen as an overwhelming task as they have items/belongings they would need to sort through and get rid of, which can take an emotional as well as physical toll. For nearly 30% of survey respondents their physical health is an extra barrier towards the process of moving.
- 5.105 The evidence from the research suggests that for some people help with practical tasks such as decluttering, packing and disposing of unwanted items would make them more likely to decide to move. From the survey, 53% of respondents say help of this kind would make them more likely to move. The qualitative research indicated that decluttering is seen as a personal task and the help they receive would need to be from someone that they trust. This tends to be a family member, but could be a trusted organisation such as a third sector organisation that supports older people.

Social barriers

- 5.106 There are also a range of social barriers that prevent people from moving home. For 33% of survey respondents, a lack of suitable housing options is a barrier to moving. This suggests that the preference and priorities for a new home (in the section above) are not being met by existing housing provision. In turn, this implies that if suitable housing options were available, then more people would consider moving in later life.
- 5.107 Although the survey indicated that a lack of information about housing choices is a barrier for only 16% of respondents, the qualitative research highlighted that the lack of information and advice about housing options is a significant barrier. Older people are seeking better information and advice about their future housing and support options. People need help to weigh up the cost implications of moving and to understand the affordability of different alternative housing options. People are seeking opportunities to access this information both on and offline from trusted sources.
- 5.108 29% of survey respondents stated they simply did not want to move, underscoring the deep-rooted preference among many older people to age in place in their existing homes.

Summary of primary research: Implications for Caerphilly County Borough Council

Older people's interest in and likelihood of moving/rightsizing in later life

- 5.109 Most older residents want to remain in their existing homes for as long as possible, especially the “older old” (65+). Moving is typically triggered by crisis (health decline, bereavement) rather than proactive choice.
- 5.110 The “younger old” (50–64) are more open to moving for lifestyle reasons (costs, manageability, location). This group is a key audience for early engagement.
- 5.111 Those already in older persons' housing are largely settled, though some seek alternatives due to design/accessibility issues or because they didn't actively choose sheltered housing in the first place.
- 5.112 The implication of this is that CCBC needs to plan for supporting the majority who wish to age in place, while offering attractive, aspirational housing choices that appeal to younger cohorts before crisis hits.

What encourages/influences people to rightsize/move

- 5.113 The strongest motivators are smaller, more manageable homes, reduced running costs, good parking, and proximity to amenities/services.
- 5.114 For some, cheaper energy-efficient homes are an incentive, especially given cost-of-living pressures.
- 5.115 There is limited appetite for specialist housing unless it is modern, affordable, and framed positively (e.g. “independent living” or “retirement living”).
- 5.116 Messaging matters: terms like “rightsizing” or “downsizing” are poorly understood or carry stigma. Marketing should emphasise positive lifestyle choices, independence and comfort, rather than loss.
- 5.117 The implication of this is that CCBC should ensure housing supply, planning policies and communications reflect these motivators and avoid negative narratives.

Preferences and priorities for a new home

- 5.118 Clear preference for bungalows, though recognition they are ‘land-hungry’; therefore, attractive alternatives (spacious apartments, small houses) are needed.
- 5.119 Two bedrooms are seen as essential by many (for storage, hobbies, guests, or health reasons). Social renters may accept one-bedroom homes, but homeowners expect two.
- 5.120 People place a high value on staying in their existing communities as many people are very connected to place and their families have lived in the same area for generations. There is only limited willingness to move more than 1–2 miles, people would tend to want to stay in the same area.
- 5.121 Good transport links, and access to shops, health services and social spaces are priorities, especially in rural areas.

- 5.122 The implication of this is that CCBC's housing strategy should focus on accessible, adaptable, and well-located homes, designed with older people's needs in mind and integrated into communities.

Barriers preventing people from rightsizing/moving and how these can be overcome

- 5.123 Financial barriers: costs of moving, high prices of suitable properties (especially bungalows) and service charges deter people. Financial incentives and affordable options are needed.
- 5.124 Emotional/physical barriers: strong attachments to long-term homes and the stress of decluttering make moving daunting. Trusted practical support (e.g. "one-stop shop" services for decluttering and moving) could help.
- 5.125 Social barriers: negative perceptions of sheltered housing, lack of attractive alternatives, and limited information about housing choices restrict options.
- 5.126 Policy/process barriers: issues with the housing register/allocation system and perceptions of unfair allocation reduce trust in the process.
- 5.127 The implication of this is that CCBC should consider practical and emotional support packages, improve information and advice services, and review allocation processes to make moving a viable and attractive option.

6. Conclusion: Recommendations/Implications for Caerphilly County Borough Council

- 6.01 Based on the evidence from the demographic analysis, evidence review and primary research, this section provides recommendations/implications for the Council in relation to meeting the housing needs and preferences of older people in the borough and supporting people to move in later life.
- 6.02 The recommendations have been themed into four key areas:
- Supporting ‘ageing in place’ in people’s existing homes
 - New build considerations
 - Existing Caerphilly County Borough Council housing considerations
 - Service offer considerations

Supporting ‘ageing in place’ in people’s existing homes

- 6.03 The evidence from the research indicated that the majority of older people want to and will remain living in their existing homes, therefore it is recommended that older people are supported to ‘age in place’ in their current homes where that is their preference.
- 6.04 This means that older people should be able to live at home with support, unless it is clearly unsafe or impractical.
- 6.05 To support people to live independently at home, it is recommended that the Council strengthens the provision of information and advice regarding the ways in which older people across all tenures can adapt their existing homes to make them more suitable for them in later life.
- 6.06 Working with RSL partners and voluntary sector organisations, provide clear information about how home adaptations can be funded, including through Disabled Facilities Grants for those who are eligible or the ENABLE scheme.
- 6.07 Promote ways that older homeowners who do not qualify for Disabled Facilities Grants can adapt their homes to make them more suitable to age-related needs. Signpost to organisations such as Care and Repair Blaenau Gwent and Caerphilly and the ENABLE scheme. Signpost to minor home adaptations that can be purchased off the shelf to support independence, focusing on those that have been designed to look ‘non-institutional’, e.g. ‘Invisible Creations’ at B&Q⁷³.
- 6.08 Provide a trusted tradesperson contact list for larger adaptations for older people who don’t qualify for Disabled Facilities Grants to feel confident in the service that will be provided to adapt their home.

⁷³ <https://www.diy.com/departments/bathroom/bathroom-accessories/grab-rails/DIY822400.cat?Brand=Invisible+Creations>

- 6.09 Signpost to home improvement loans provided by the Council to enable older homeowners who do not qualify for public sector grants, for example Disabled Facilities Grants or support from Care and Repair Wales, to access more favourable loans for home adaptations.
- 6.10 Provide information and advice about and signpost to organisations that provide assistive and mainstream technology that can be utilised to support people to live independently.
- 6.11 The evidence indicates that people are not aware of how adult social care can or cannot support them. Strengthen information and advice regarding the ways in which older people can access and pay for social care support at home should they need it. Clarify what rights people have under the Social Services and Well-being (Wales) Act (i.e. entitlement to assessment, eligibility criteria, what happens if someone does not qualify for fully-funded care, access to advice and preventative services). Promote this via online and offline methods.
- 6.12 Provide information that supports people to 'age in place' in multiple formats (web, print, large print, other languages, face-to-face) to suit different needs/digital access.
- 6.13 The evidence from the primary research with older people is that loneliness and social isolation can be a challenge for many older people. Promote and support opportunities for social connections in existing communities, such as existing community groups and centres like the Caerphilly 50+ forum, Caerphilly Miners Centre and Cefn Fforest Community Centre. Promote social prescribing that connects patients to their local community to bring about health benefits.
- 6.14 Ensure that the community infrastructure is 'age-friendly' and supports older people to be able to get out and about. For example, funding from Section 106 agreements or Community Infrastructure Levies (CIL) could help fund public toilets, benches and bus shelters with seats for good public/community transport that better meet the needs of older people.

New build considerations

- 6.15 Increase the range of housing options and tenures to attract a diverse range of older people to move into both mainstream and specialist housing in later life.
- 6.16 Whether living in specialist or mainstream housing, older people want to live in mixed-age communities. Therefore, the Council should promote the development of mixed-age communities through a mix of housing types and tenures and community infrastructure.
- 6.17 All new homes designed to attract older people to move should be located in areas with good access to shops, amenities and public transport. New homes should be located on flatter ground, ideally close to town centres to ensure people can still access services.

Mainstream housing

- 6.18 The evidence from the research indicates that the majority of older people would prefer to move to another 'ordinary/mainstream' home that has been designed to be accessible from the outset if they were to move.
- 6.19 It is recommended that Caerphilly County Borough Council encourages the development of mainstream homes that are accessible by setting clear targets for accessible and adaptable homes in local planning documents.
- 6.20 Work with the planning department to develop a Local Development Plan that requires that a proportion of new build homes are accessible, for example the London Plan requires that 90%

of new homes be built to be adaptable for residents with accessibility needs such as *Building Regulations M4(2) (accessible and adaptable dwellings)* and *M4(3) (wheelchair user dwellings)*.

- 6.21 Draft Supplementary Planning Guidance (SPGs) that provides developers with detailed expectations for accessibility, design and layout in relation to housing suited to older people, using this research as a basis for this.
- 6.22 Continue to use Section 106 agreements to secure more accessible homes as part of affordable housing contributions.
- 6.23 The evidence from the qualitative research indicated that whilst bungalows are the preference of many older people who wish to move, people are seeking a range of housing options in later life and are mainly seeking something smaller but still spacious. It is recommended that the Council encourages the development of smaller houses, spacious apartments or less 'land-hungry' bungalows that match what people say they want in this research, to attract older people to move.
- 6.24 To attract older homeowners to move, new homes should be provided with at least two bedrooms. For older people that rent their homes from a social landlord, one-bedroom homes are also likely to attract social renters to move; to align with best practice, '1-bed-plus' homes⁷⁴ should be considered.

Specialist housing

- 6.25 A sizable minority of older people in the borough would consider moving to a home with an age designation, provided it is attractive, aspirational and affordable. Therefore, it is recommended that CCBC encourage the development of additional new housing that is designated for older people as part of increasing the range of housing choices for older people and replacing existing stock that isn't suited to older people.
- 6.26 Work with the planning department to incorporate the need for specialist housing for older people into the Local Development Plan.
- 6.27 Draft Supplementary Planning Guidance (SPGs) that provide developers with detailed expectations for specialist housing for older people in terms of accessibility, design and layout, using this research as a basis for this.
- 6.28 Explore the ways in which a range of Welsh Government capital grant programmes can be used to support the development of specialist housing, for example the Housing with Care Fund, Social Housing Grant or Affordable Housing Delivery Scheme.
- 6.29 It is recommended that CCBC expand the provision of a contemporary version of 'sheltered' housing that replicates the approach it is taking to develop Ty Darran, as well as the approach that other leading providers such as Cardiff City Council are taking to provide new specialist homes for older people that attract them to move in later life.
- 6.30 It is estimated that the number of older people living with care and support needs will increase by 2040. The research highlights that people do not wish to live in a 'care home' in later life. It is

⁷⁴ A one-bedroom apartment with flexible partitions that provide different layout configurations based on residents' requirements. For example, the adaptable 'study space' can be opened up to part of the lounge or removed altogether to create a larger bedroom.

recommended that CCBC expand the provision of extra care housing across the borough as an alternative to 'residential care'.

- 6.31 Work with RSL partners with a track record of providing good quality extra care housing in Wales to deliver extra care housing that provides good quality, accessible housing.
- 6.32 New contemporary sheltered housing and extra care housing should provide:
- Homes that have been designed to the HAPPI design principles.
 - A scheme manager available on site complemented with technology that provides support and adheres to the TAPPI principles.
 - Wi-Fi provision across the site or communal areas as a minimum.
 - Vibrant and attractive communal spaces that have a hotel-like feel that encourages people to use it in an 'organic way', meaning that people would naturally stop and sit in the communal areas; this tends to be located closer to the entrance. It is also important that not too much communal space is provided, to keep the service charges as affordable as possible.
 - Accessible homes that support people to age in place. Key features include a wet room, accessible kitchens, wider doors/corridors, spacious homes for mobility, a lift.
 - Consideration to dementia-friendly design such as different coloured walls on each level, clear signage and visual clues.
 - Natural light and ventilation throughout.
 - A mix of one and two-bed homes, explore the possibility of '1-bed plus' homes.
 - A guest room for family to stay, particularly if only one-bedroom homes are provided.
 - Good parking provision, access to public transport, shops and amenities.
 - Consider the topography by being located on flatter ground, ideally close to town centres to ensure people can still access services.
- 6.33 Designated older persons' housing should be located within existing communities, not on sites that are difficult to develop for other uses; in some cases they can provide a hub for the local community.
- 6.34 Provide assistive and mainstream technology that can support with residents' health and wellbeing outcomes.

Existing Caerphilly County Borough Council housing considerations

- 6.35 Consider this research in relation to the refurbishment of CCBC's sheltered housing and age-designated housing to make it more attractive to older people. The evidence suggests that more people may consider a move to older persons' housing provided it is sufficiently attractive, affordable and aspirational.
- 6.36 Where existing sheltered housing schemes are identified as suitable for refurbishment, adopt and apply the Housing an Ageing Population: Panel for Innovation (HAPPI) design principles as far as practically possible.

- 6.37 Rebrand existing sheltered housing as this term is off-putting to many older people. This would involve changing the 'sheltered' terminology; terms such as 'Independent Living' or 'Retirement Housing' are typically preferred.
- 6.38 Rebranding existing sheltered housing so there is an identifiable CCBC 'brand' in the look and feel of schemes.
- 6.39 The evidence indicates that the resident profile in sheltered housing is becoming more diverse, with people of different ages and with differing needs living alongside each other. For example, 'traditional' sheltered residents living alongside younger residents with support needs. The evidence is that this can make schemes off-putting to future residents. Consider who gets access to sheltered housing and whether there is scope to differentiate schemes based on care/support needs.
- 6.40 It is understood that the Council has a large amount of age-designated housing accommodating older people that is not deemed fit-for-purpose and it is currently under review. It is recommended that the findings from this research are considered when reviewing the future of CCBC's age-designated housing.
- 6.41 In relation to CCBC's age-designated housing it is recommended that the stock that is deemed the least fit-for-purpose is re-designated as 'general needs housing'. This may mean supporting existing residents to move to more accessible housing where they choose to do so, or adapting existing properties as far as possible to ensure people can remain living in their homes.
- 6.42 Strengthen the Accessible Housing Register held by the Council so that the Council has a good understanding of which properties across the borough have accessible features. See this example from Gloucestershire County Council⁷⁵.

Service offer considerations

- 6.43 To encourage/attract more people to move home in later life it is recommended that older people across all tenures are supported with the moving process. CCBC should work with third sector organisations to support people to, for example, declutter their homes and get rid of unwanted items.
- 6.44 Financial incentives should be explored as means of encouraging/attracting people to move; financial incentives could include help with the cost of moving or help with the cost of redecorating or furnishing a new home.
- 6.45 Provide information on the potential financial benefits of moving home, such as reduced running and/or ongoing maintenance costs.
- 6.46 There is a need to strengthen access to independent advice on housing and support options in later life to support people with decision making around moving to more suitable housing.
- 6.47 The qualitative research indicated that the term 'rightsizing' is not widely understood by research participants and is mainly a professionalised term. As such it is recommended that

⁷⁵ <https://www.housinglin.org.uk/blogs/An-Accessible-Housing-Register-Registering-the-approach-in-Gloucestershire/>

the term ‘rightsizing’ should be avoided in marketing that is focused on encouraging people to move in later life.

- 6.48 The Council should seek to reframe the narrative around moving in later life, focusing on moving as a lifestyle-enhancing choice rather than a last resort in a crisis. The evidence indicates that to encourage older people to move in later life it is important to use language that feels positive, empowering, and focused on their lifestyle goals rather than on giving things up. Terms should emphasise choice, comfort, and future benefits, such as “finding a home that suits your life now”, “making life easier”, or “planning for the future”. Messaging should highlight what matters most to people—such as having more time for hobbies, being closer to family, or living in a space that’s easier to maintain—rather than implying loss or reduction in life experience. Using aspirational language that frames the move as an opportunity for freedom, convenience and enjoyment helps make it feel like a proactive, positive step rather than a necessity.

Annexe

Evidence review bibliography

- **Age Friendly Ireland** (2021). *A Study on the Awareness, Perceptions and Experiences of Older People of Rightsizing*. Available at: <https://agefriendlyireland.ie/wp-content/uploads/2021/06/AFI-Right-Sizing-Research-Report.pdf>
- **Aitken et al.** (2022). *What older people want research report*. Available at: https://assets.publishing.service.gov.uk/media/673f1d09b3f0df6d2ebaf02d/What_older_people_want_research_report.pdf
- **APPG Housing and Care for Older People** (2024). *Regeneration of Outdated Sheltered Housing*. Available at: <https://www.housinglin.org.uk/Topics/browse/Housing/HousingforOlderPeople/ShelteredHousing/appg-inquiry-sheltered-housing-regen/>
- **Davies** (2014). *What older people want*. Available at: https://assets.publishing.service.gov.uk/media/673f1d09b3f0df6d2ebaf02d/What_older_people_want_research_report.pdf
- **Expert Group on Housing an Ageing Population in Wales** (2017). *Our Housing AGEnda: Meeting the Aspirations of Older People in Wales*. Available at: <https://www.housinglin.org.uk/Topics/type/Our-Housing-AGEnda-Meeting-the-aspirations-of-older-people-in-Wales/>
- **Hammond, M., White, S., Walsh, S.** (2018). *Rightsizing: Reframing the housing offer for older people*. Available at: <https://ageing-better.org.uk/sites/default/files/2019-02/rightsizing-manchester-school-architects.pdf>
- **Hillcoat-Nallétamby, S. & Sardani, A.** (2015). *Qualitative Evaluation Report: The Moving On Service*. Commissioned by Canllaw, Porthmadog. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/OtherOrganisation/170213-expert-group-final-report-eng.pdf
- **Housing LIN and Ipsos** (2024). *Older People's Housing Preferences*. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/Support_materials/Reports/HLIN_Ipsos-Older-Peoples-Housing-Preferences_Report.pdf
- **Housing LIN**. *HAPPI Principles*. Available at: <https://www.housinglin.org.uk/Topics/browse/Design-building/HAPPI/>
- **King et al.** (2021). *What older people want*. Available at: https://assets.publishing.service.gov.uk/media/673f1d09b3f0df6d2ebaf02d/What_older_people_want_research_report.pdf
- **Lifetime Home Standards**. Available at: <https://cae.org.uk/our-services/housing-services/lifetime-homes/>
- **MHCLG** (2024). *What older people want research report*. Available at: https://assets.publishing.service.gov.uk/media/673f1d09b3f0df6d2ebaf02d/What_older_people_want_research_report.pdf
- **Price et al.** (2014). *What older people want research report*. Available at: https://assets.publishing.service.gov.uk/media/673f1d09b3f0df6d2ebaf02d/What_older_people_want_research_report.pdf
- **Public Health Wales and Gwent Regional Partnership Board** (2019). *The APPROPRIATE and RIGHTSIZING Study*. Available at:

https://www.housinglin.org.uk/_assets/Resources/Housing/OtherOrganisation/The-Appropriate-and-Rightsize-Study-Technical.pdf

- **Shakespeare Martineau** (2023). *Moving On: Could Later Living Be the Answer to the Housing Crisis?* Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/OtherOrganisation/0427-Moving-On-paper-report-SHMA-FINAL.pdf
- **Welsh Government** (2013). *Our Housing AGenda: Meeting the Housing Aspirations of Older People*. Available at: https://www.housinglin.org.uk/_assets/Resources/Housing/OtherOrganisation/170213-expert-group-final-report-eng.pdf

50+ population growth rates

Table 18. Growth rates of 50+ population to 2040 from 2021

Year	2021	2025	2030	2035	2040
50+ Population	73,238	74,843	75,935	77,560	79,225
% change to 2021		2.2%	3.7%	5.9%	8.2%
60+ Population	47,544	50,505	53,853	55,335	55,712
% change to 2021		6.2%	13.3%	16.4%	17.2%
70+ Population	26,317	27,646	29,509	32,103	34,428
% change to 2021		5.0%	12.1%	22.0%	30.8%
80+ Population	8,794	9,841	11,843	12,555	13,443
% change to 2021		11.9%	34.7%	42.8%	52.9%

Source: 2018 older people population projections by local authority and year

Current supply of older people housing (retirement/sheltered housing and extra care housing)

Table 19. Current supply of retirement/sheltered housing in Caerphilly County Borough

Scheme name	Address	Registered Social Landlord	No. of units
St Clare's	St Clare's, Rhymney, Tredegar, NP22 5JN	Caerphilly County Borough Council Housing	32
Prospect Place	Prospect Place, Abertysswg, Rhymney, NP22 5AB	Caerphilly County Borough Council Housing	30
Ysgwyddgwyn	Ysgwyddgwyn, Deri, Bargoed, CF81 9HY	Caerphilly County Borough Council Housing	24
Glynsyfi	Glynsyfi, New Tredegar, NP24 6DE	Caerphilly County Borough Council Housing	32
Oaklands	Oaklands, Gilfach, Bargoed, CF81 8QE	Caerphilly County Borough Council Housing	31
St Gwladys Court	St Gwladys Court, Bargoed, CF81 8UG	Caerphilly County Borough Council Housing	21
Waurhydd	Waurhydd, Gelligaer, Hengoed, CF82 8HY	Caerphilly County Borough Council Housing	31
Heol Islwyn	Heol Islwyn, Nelson, Treharris, CF46 6HG	Caerphilly County Borough Council Housing	32
Pleasant Place	Pleasant Place, Penyrheol, Caerphilly, CF83 2NX	Caerphilly County Borough Council Housing	31
Glyn Derw	Glyn Derw, Churchill Park, Caerphilly, CF83 3EZ	Caerphilly County Borough Council Housing	32

Scheme name	Address	Registered Social Landlord	No. of units
Greenacre Drive	Greenacre Drive, Bedwas, Caerphilly, CF83 8HG	Caerphilly County Borough Council Housing	31
The Willows	The Willows, Bedwas, Caerphilly, CF83 8BB	Caerphilly County Borough Council Housing	29
Grove Estate	Grove Estate, Trethomas, Caerphilly, CF83 8DH	Caerphilly County Borough Council Housing	62
Maesteg	Maesteg, Pentwynmawr, Newbridge, NP11 4HH	Caerphilly County Borough Council Housing	27
St Peter's Close	St Peter's Close, Panside, Newbridge, NP11 5DQ	Caerphilly County Borough Council Housing	11
Tir Y Pwll Terrace	Tir Y Pwll Terrace, Panside, Newbridge, NP11 5GF	Caerphilly County Borough Council Housing	18
Gibbs Close	Gibbs Close, Blackwood, NP12 1WL	Caerphilly County Borough Council Housing	21
Palmer's Place	Palmer's Place, Blackwood, NP12 1WN	Caerphilly County Borough Council Housing	16
Gwyddon Court	Gwyddon Court, Market Place, Abercarn, NP11 5GW	Caerphilly County Borough Council Housing	11
The Ranks	The Ranks, Abercarn, Newport, NP11 4SA	Caerphilly County Borough Council Housing	25
Horeb Court	Horeb Court, Trinant, Crumlin, NP11 3HZ	Caerphilly County Borough Council Housing	20
Ty Melin	Ty Melin, Croespenmaen, Crumlin, NP11 3BX	Caerphilly County Borough Council Housing	12
Highfield Court	Highfield Court, High Street, Newbridge, NP11 4GS	Caerphilly County Borough Council Housing	20
Ty Bedwellty	Ty Bedwellty, Cefn Fforest, Blackwood, NP12 3JJ	Caerphilly County Borough Council Housing	25
Ty Mynyddislwyn	Ty Mynyddislwyn, Pontllanfraith, Blackwood, NP12 2JE	Caerphilly County Borough Council Housing	28
Tredegar Court	Tredegar Court, Tredegar Street, Crosskeys, NP11 7QA	Caerphilly County Borough Council Housing	26
Waunfawr House	Waunfawr House, Crosskeys, Newport, NP11 7AN	Caerphilly County Borough Council Housing	22
Alexandra Court	Alexandra Court, Ynysddu, Newport, NP11 7JF	Caerphilly County Borough Council Housing	19
Woodland View	Woodland View, Wattsville, Crosskeys, NP11 7QE	Caerphilly County Borough Council Housing	21
Britannia Court	Britannia Court, Risca, Newport, NP11 6BL	Caerphilly County Borough Council Housing	22
St Mary's Court	St Mary's Court, Risca, Newport, NP11 6HB	Caerphilly County Borough Council Housing	18
Ty Isaf	Ty Isaf Complex, Risca, Newport, NP11 6NB	Caerphilly County Borough Council Housing	12
Y Glyn	Y Glyn, Maesycwmmer, Hengoed, CF82 7PF	Caerphilly County Borough Council Housing	37
Ynyswen	Ynyswen, Sirhowy View, Pontllanfraith, NP12 2GW	Caerphilly County Borough Council Housing	13
Quarry House	Quarry House, Cwrt Pen-Capel, CF83 1BH	Linc Cymru	37
Llwyn Onn	Llwyn Onn, Penpedairheol, CF82 8BB	Linc Cymru	23
Village Court	Village Court, Oakdale, NP12 0LU	Linc Cymru	23

Scheme name	Address	Registered Social Landlord	No. of units
Cwrt Cwm Derwen	Cwrt Cwm Derwen, Oakdale, NP12 0HN	Linc Cymru	9
Richmond Close	Richmond Terrace, Llanbradach, Caerphilly, CF83 3JE	United Welsh	29
Parrish Place	Commercial Street, Senghenydd, Caerphilly, CF83 4GP	United Welsh	18
Llys Nant Yr Aber	Caerphilly, Mid Glamorgan, CF83 3RS	United Welsh	18
St Davids	St Davids Close, Rhymney, Tredegar, Gwent, NP22 5NL	United Welsh	11
Beech Tree View	Caerphilly, Mid Glamorgan, CF83 1DX	United Welsh	6
Riverside Walk Deri	Riverside Walk, Deri, Bargoed, Caerphilly, CF81 9GE	United Welsh	9
Cwrt Andrew Buchan	Goshen Street, Rhymney, Tredegar, Gwent, NP22 5NN	Wales and West	35
Fferm-Y-Bryn	Brymynach Farm Estate, Ystrad Mynach, Hengoed, Mid Glamorgan, CF82 7BD	Wales and West	42
St Catherine's Court	Caerphilly, Mid Glamorgan, CF83 3NH	Wales and West	31
Cefn Glas	Blackwood, Caerphilly, NP12 1HD	Pobl	14
		Total	1,147

Source: EAC (2019), Caerphilly County Borough Council (2025), Aelwyd Housing (2025), Linc Cymru (2025), Pobl (2025), United Welsh (2025), Wales and West Housing (2025)

Table 20. Current supply of extra care housing in Caerphilly County Borough

Scheme name	Address	Post code	Registered Social Landlord	No. of units
Cefn Glas	Maes y Coed, Blackwood, Caerphilly, NP12 1WS	NP12 1WS	Pobl	28
Plas Hyfryd	74 Fford y Maes, Caerphilly, Mid Glamorgan, CF83 2BH	CF83 2BH	United Welsh	49
			Total	77

Source: EAC (2019), Caerphilly County Borough Council (2025), Aelwyd Housing (2025), Linc Cymru (2025), Pobl (2025), United Welsh (2025), Wales and West Housing (2025)

Notes from the qualitative research with people with lived experience

CCBC Gwyddon Court & The Ranks Sheltered Housing tenants (27/05/25)

- A range of factors influenced people to move into Gwyddon Court and the Ranks:
 - Deteriorating health reasons of self or partner
 - Loss of partner and previous home was unmanageable on their own and looking for a smaller property
 - Some people not necessarily looking for 'sheltered housing' where there is an age designation but ended up there because they wanted a smaller home and there was nothing else available
 - Wanted to feel safe and secure and attracted by the availability of staff and secure design

- Wanted to have a greater sense of community
- The accessibility of the scheme was raised as a challenge for residents. For people with scooters or a wheelchair, the scheme is very difficult to navigate.
- The scheme is acting as a hub for the local community. It was not only residents that were in attendance at the bingo session, people that lived nearby were joining in and valued the sense of community that the scheme brings them.
- When asked how far people would consider moving in later life, the group said about 2 miles as a maximum from where they lived previously, indicating that people want to remain close to their existing communities.
- The group think that there should be more contemporary 'sheltered' housing provided across Caerphilly borough to accommodate an ageing population.
- The key features of a contemporary 'sheltered' housing should include:
 - Accessible and spacious accommodation to account for mobility issues in later life. Wet rooms and a lift are essential in new schemes.
 - Private outdoor space, such as a small balcony.
 - Adequate storage as people felt that they had limited storage in their existing homes.
 - External green shared space and a pleasant outlook.
 - People think that one bedroom is sufficient, particularly those who are self-funding, but a guest room needs to be provided so that friends/family can stay over.
 - Communal space is considered essential although people understand this can increase the cost of living in sheltered housing, they think that something should be provided to encourage a sense of community.
 - Residents think that some staff presence is essential, people feel reassured that someone is there just in case and they can turn to someone if they have any issues.
 - The availability of telecare to support independence when the scheme manager isn't on site.
 - There were different views on the design of kitchens, some people liked open plan whereas others liked to separate the kitchen to reduce cooking smells.
 - Parking is important to people, this is a challenge at the scheme.
- In general, there wasn't an issue with the term 'downsizing' amongst residents, people understood what it meant and used it compared to 'rightsizing'. Some felt that it is only natural to 'downsize' as you get older.
- There is a sense of 'shame' around the term 'sheltered housing' and people don't like to use this word to describe where they live because it has negative connotations and they think people perceive them as 'old'. The term 'independent living' is used or 'complex' to describe where they live.

CCBC Waunrhydd Sheltered Housing tenants (27/05/25)

- Participants shared a variety of reasons that they moved to the scheme:

- Moved due to having to leave previous private accommodation as the landlord was selling.
- For some, they felt that they need to live in a smaller home that was easier to manage.
- Several people moved in order to be closer to family members, which supports both social connections and practical needs.
- To feel safe and secure and to have a greater sense of community.
- Some residents had experienced homelessness prior to moving into sheltered housing.
- Most residents value living in sheltered housing and wouldn't want to move. They particularly value the staff support and would prefer to have a dedicated scheme manager.
- Residents raised that the scheme has changed over the years and more younger people with support needs have been moving in which has changed the nature of the scheme. In some cases, this can create problems for residents as they don't feel as safe.
- Residents note that the communal space isn't used as much as they would like. It isn't that inviting and is in need of modernising.
- Residents expressed feeling safer in sheltered housing compared to living independently in the wider community. They think this is a key pull factor for living in sheltered housing.

CCBC Grove 2 Trethomas bungalows (28/05/25)

- In general, people liked living in Grove 2 and wouldn't want to move. They have good neighbours and feel settled where they are.
- Participants had moved to Grove 2 bungalows for multiple reasons:
 - Living in a bungalow was a very attractive pull factor.
 - Wanted a smaller more accessible home (although people felt that the accessibility could be improved).
 - Health reasons of self or partner which meant they were unable to manage in a larger property with stairs.
 - For some people they wanted to move somewhere with a greater sense of community because they felt lonely in their previous homes.
 - Some long-standing residents moved initially because they were attracted by the presence of a live-in warden.
- Participants value the age designation and wouldn't want to live with families because they think it would be too noisy, and they are also worried about anti-social behaviour.
- People like the location, which is near to transport, shops and a good health centre.
- Although people moved to be somewhere that is more accessible than their previous homes, they find the bungalows are not suitable for wheelchairs or scooters. People think that wet rooms should be provided throughout.
- Challenges were also raised regarding access to the site for fire or ambulance services.
- People value the green space surrounding the scheme however there were complaints regarding maintenance of these.

- Parking can be a challenge of carers and residents.
- The allocation system is seen as a barrier for local people coming into properties. Residents are aware of local people who would like a property, but they are not being allocated one of the bungalows, some of which are empty for too long.
- Residents want to be better informed about when the scheme manager is on site and feel this isn't sufficiently communicated.
- People think that the benefits of living in sheltered housing should be better communicated to older residents in general needs housing. Focusing on the benefits in marketing is seen to be a good way of encouraging people to move.

CCBC General Needs tenants (25/05/25)

- Most people living in general needs housing would like to remain in their existing homes. Most of the group were living in larger three-bedroom properties. People want better support with adapting their homes and knowing where to turn to should they need care/support in the home.
- However, some people do recognise that their properties may not be suitable for them should their health and mobility deteriorate.
- People want better housing choices in later life; they think that existing sheltered housing is undesirable and wouldn't attract them to move. It is considered outdated and feels like a care home.
- More people would consider moving to older persons' housing if it provided a 'contemporary' looking home that is designed to be accessible. People think that staff should be provided at sheltered housing schemes to provide support and create a sense of community.
- Living in age-designated housing is attractive for some people, whereas others aren't interested in this type of living and just want an ordinary home that has been designed to be accessible from the outset. Whether living in age-designated housing or not, people are seeking mixed-age communities as this creates vibrance.
- Having affordable housing choices is essential for participants; the service charges that come with sheltered or extra care housing are off-putting.
- In relation to housing types, bungalows are preferred but some people would consider moving into a flat, provided it was spacious and has some private outside space. There is also interest in smaller houses.
- People are interested in homes with a mix of bedroom sizes, living in a one-bedroom flat is acceptable, but many people would prefer two bedrooms. It comes down to affordability and also the 'bedroom tax' if people are moving pre-retirement.
- Living in an area that is close to where they live now, has a sense of community and is close to shops, public transport and other amenities is important. Some local older persons' housing was reported to be situated in hilly areas, which are not easily accessible.
- A big barrier to moving is the cost of the moving process with one person saying, 'how would I manage it financially, I just couldn't'.
- Participants stated that the process of moving is not made easy for people who want to 'downsize'. Not everyone is digitally skilled, and the bidding process feels unfair.

- There is a view that homeowners are able to access bungalows in social housing, which people are unhappy with.
- People do not understand the phrase ‘rightsizing’ and find it confusing.

Elderberries, Caerphilly Miners Centre (15/07/25)

- People have a strong attachment to their existing home and community. Most participants want to stay in their current homes because of memories, family connections, and local social networks. Homes often act as a hub for extended family.
- Many have made or considered home adaptations to support ageing in place, but there are barriers such as cost, unattractive design, and difficulty accessing support or information.
- There is a need for more accessible gardening, cleaning and maintenance services, as well as clearer information about available support and how to access it.
- People are seeking to live in mixed-age communities; opportunities for intergenerational interaction are seen as positive.
- Participants want a range of housing options—not just specialist or institutional settings—so they can choose what best fits their needs and preferences. People tend to want another ‘ordinary’ home rather than to move to specialist housing such as retirement housing or extra care housing.
- People do consider retirement and extra care housing to be a good idea for people that need it and think there should be more of this provision across Caerphilly. Some people would consider moving to this type of housing if it didn’t feel ‘institutional’.
- The cost of care homes and specialist housing is a significant worry. People want affordable, accessible housing options that don’t require sacrificing their financial security.
- Good transport links and proximity to essential services (shops, GPs, social activities) are priorities, but current provision is often inadequate. In some instances, people might consider a move to be closer to services.
- There are a range of barriers preventing people from moving. Decluttering and the emotional process of leaving a long-term home are significant challenges. High housing costs, emotional attachment to home, a lack of suitable housing options and the desire to retain home equity for children are major reasons people are reluctant to move.
- ‘Rightsizing’ is not widely understood by participants and people think this is a confusing term. People know about the term ‘downsizing’ and think this has negative connotations. To encourage people to consider a move in later life participants think that moving should be marketed as a ‘lifestyle’ move rather than moving to something smaller or moving because you are getting older.

Men’s Shed, Caerphilly Miners Centre (24/07/25)

- This group comprised 7 men and 1 woman who facilitates the group. People’s age ranged from 55 to 85 and everyone was a homeowner.

- Most people had lived in their homes for 30 years+, some nearly 50 years. A mix of people living on their own or with a partner. One person had moved from Cardiff to a bungalow to be closer to family as he was in his 80s and his wife had passed away so he needed some support. Some of the younger participants still had adult children living at home.
- Most participants want to stay in their homes in later life although one participant had moved from Cardiff to Caerphilly to be closer to family when his wife died.
- Participants strongly preferred remaining in their current houses, adapting them if needed (e.g. stairlifts, downstairs toilets) rather than moving. Most of the participants are living in larger homes, some on their own, a few with a partner.
- People state that moving is often only triggered by crisis (ill health, loss of partner).
- However, some of the younger participants mentioned that they were considering moving but this was not for 'age-related health reasons' it is more about a change in lifestyle, for example adult children moving out and thinking about living in a smaller property or simply wanting a home that is a bit more manageable. Some people want to potentially free up equity from their homes. They would be interested in a smaller house or potentially in some cases an apartment, but a home would need to have a minimum of two bedrooms.
- The barriers to moving vary but many people have emotional ties and memories linked to living in their homes for a long time.
- The logistics and stress of moving is also a barrier (packing, removals, redecorating). People also fear losing community, neighbours, pets and gardens.
- People are seeking a "one-stop shop" service to handle the logistics of moving (estate agents, removals, clearance). More people would consider moving if this was available.
- There are also considerable financial concerns, including capital gains tax implications and preserving inheritance for family by holding on to their home for as long as possible.
- If they were to move, they would be looking for a smaller home that is more manageable, but people feel there isn't this option available. Existing smaller homes are not attractive or are too small. People would be seeking two bedrooms.
- People recognise the need for more suitable housing options for later life such as retirement housing or extra care housing but are reluctant to imagine themselves in it. There's a disconnect between what people recommend "for others" and what they would choose themselves.
- Many disliked the idea of sheltered housing because they associate it with existing sheltered housing, which is seen as outdated and wouldn't attract them to move. More people would potentially consider moving if this accommodation was designed to look like 'ordinary' housing and offered a contemporary, modern home that people could stay in for life.
- Rebranding and modernising sheltered housing to make it more attractive would potentially attract some people to move but it would need to be affordable to homeowners.
- The group considered that sheltered housing needs to be better marketed to older people, to show the benefits rather than having to move because you 'need to'. 'Rightsizing' is not widely understood by most people and is considered a professional term.

- People preferred mixed-age communities with strong community spirit rather than segregated age-designated schemes. People think that any future contemporary version of sheltered housing should be embedded into an existing community.
- The evidence indicated that people are seeking homes that are built to be adaptable from the outset (e.g. easily-converted downstairs bathrooms, step-free access, wider doors). People are seeking to age in place in their existing home rather than move to specialist housing for older people.
- The evidence indicates that people are seeking neighbourhoods that enable them to feel a sense of community. Positive examples were small, supportive estates with shared communal facilities and strong neighbour networks. People highly valued the community at the Caerphilly Miners Centre and considered that a contemporary sheltered housing scheme nearby would be a good blueprint for other developments.
- Nearly everyone in the group owns a car and would be reluctant to give it up as it would feel like they would be giving up their independence. If people moved, they would want to be able to have good access to parking.

Woodfield Side Senior Citizens Group

- This group comprised 30 women from a range of ages from 55 to 100. There was a mix of homeowners and social renters, including a handful of people that lived in retirement/sheltered housing in the social sector.
- Most individuals would like to remain in their current property for as long as possible and make adaptations to bathrooms/put in a stairlift etc. Homeowners are concerned about the cost of adapting their homes and some think it is unfair that they have to spend their own money on adaptations whilst others get grants/free support.
- Some people had already made adaptations to enable them to stay put, such as a downstairs bathroom. People are seeking a trusted tradesperson contact list to support them to adapt their homes; often the barrier is not knowing to whom to turn.
- People are also seeking better access to information about what happens should you need care in the future. People think that using the group to provide this information face-to-face would be a good idea, as many people are not online.
- People raised a lack of public transport as an issue for them in later life. Although most people would prefer public transport to be improved, some would consider moving if it meant they had better access to shops/amenities and transport links.
- People indicated that they are most likely to consider a move when their health deteriorates rather than before.
- When thinking about moving to an alternative home, there was some interest in moving to older persons' housing such as retirement/sheltered housing, provided it is accessible, contemporary and affordable.
- Some people were already living in sheltered housing and were broadly happy with living in this accommodation and liked the sense of community they felt. A real challenge is finding affordable retirement/sheltered housing if you are a homeowner who wouldn't qualify for social housing and can't afford a private sector scheme.

- If people were to move to sheltered housing, they would want a scheme manager to be available as well as communal space to encourage a community. However, to make it more affordable, people would consider a reduced amount of communal space, provided the scheme was well located close to amenities.
- People are put off by existing sheltered housing as they think it is outdated and wouldn't support them should they develop mobility needs. It feels like a care home.
- The majority of people would prefer to move to a bungalow, however, they understand that these are 'land-hungry' to develop. Bungalows tend to be seen as the ideal as they are smaller, on one level and people like that they aren't connected to other properties. People are worried about the noise in flats and feeling on top of each other.
- However, people would consider a range of other smaller housing types if they were to move, such as a smaller house with two bedrooms, most people are in three or four-bedroom houses. Some people would consider a move to an apartment provided it has outside space, is spacious and is designed to mitigate noise from neighbours.
- Most homeowners would be seeking a two-bedroom property and would not consider only one bedroom. People would use the second bedroom for guests, hobbies, storage or in cases where partners need to sleep separately for health reasons.
- More people might consider moving if they had a better choice of housing options; at the moment people don't feel there is enough accommodation to support older people in the borough.
- People would also be looking for support with moving, this can be a huge barrier. The moving process is physically tiring and without support from family would be difficult.

Cefn Fforest Community Centre Coffee morning

- Most participants want to remain in their existing community, which they describe as being tight knit. There have been generations of the same family that have lived in this community. This means people have strong emotional connections to their homes and the neighbourhood that they live in.
- Most people want to stay in their existing homes with adaptations. Some private homeowners had adapted their homes using Disabled Facilities Grants and some social tenants had adaptations funded via the RSLs HRA, this has made their homes more suited to mobility issues. People think that more information is needed about how to get support with adapting your current home.
- The group think that more bungalows are needed in the neighbourhood to support older people to remain living in the existing neighbourhood. One person who lived in a bungalow felt very lucky.
- People would consider living in a flat in the neighbourhood, provided that it provided accessible housing, had a lift and felt safe and secure.
- Most people don't think sheltered housing is an attractive option and think it is 'for old people' and 'like a care home'. People think that there is a need for sheltered housing, but this tends not to be for themselves but for someone else.

- A contemporary version of sheltered housing would attract more people to move as it would change people's perception of what sheltered housing is. People would be seeking 1-2 bedrooms, wet rooms, a lift, private outdoor space, good parking and spacious living.
- Some people have purchased their homes through the 'Right to Buy' scheme and are worried about having to use the value of the home to pay for their care/support should they need it, some people think it is unfair and they weren't aware of this when they bought their home. This means that people are more reluctant to move as they see their home as an asset they need to hold on to. Right to Buy purchasers are also concerned that the value of their existing homes wouldn't cover the cost of a new property that was more suitable.
- The group thinks that more council housing is needed in the area as young people are struggling to get access to housing. Adult children are living at home longer.
- Everyone in the group stressed the importance of community centres for people's health and wellbeing. It provides social opportunities and also strengthens the local community who look out for each other.
- Another barrier for people is the upheaval of moving. Decluttering and getting rid of belongings is extremely stressful and exhausting and people don't want to think about it.

Caerphilly over 50s forum

- The majority of people want to 'stay put' and be supported to do so with:
 - Access to and advice on adaptations they can make to the home
 - Understanding how to access and pay for care and support going into the home
 - Support to maintain their gardens and homes
- People are looking for support to adapt their homes. Some of the group had already put in a downstairs bathroom to enable them to live downstairs.
- Staying put is potentially even more important from a 'cultural perspective' for people in Wales as people are very family and community orientated and want to remain in their existing communities. The conversation highlighted people's families have lived in the same community for generations, which creates stronger ties to their existing communities.
- Some people in the group are actively planning ahead to adapt their homes and make necessary arrangements but more needs to be done to help people plan ahead and understand their housing and care choices/requirements.
- Some people are considering moving, particularly those that are younger, but not to a specialist development, just another ordinary home that is more manageable. If they were to move, they would want a smaller home but people would want a minimum of two bedrooms.
- No one wants to be in a care home, people should be supported to remain living at home or moving to alternative supported accommodation, such as extra care housing as far as possible.
- Extra care housing is seen as a good thing for people with care/support needs and there is a need for this type of accommodation in the borough.

- A contemporary version of sheltered housing is needed that is affordable and attracts people to move because the home is of high quality, easy to maintain and beautifully designed.
- There is potential interest in a retirement village, people see this model as enabling you to have your own space compared to a block of flats for older people that feels very closed in.
- People tend not to favour flats as they don't feel like they have their own space, would prefer a smaller house or ideally a bungalow. However, more people would consider a move to a flat if it offered attractive, affordable accommodation.
- Barriers to moving:
 - Getting rid of possessions: 'It took me six months to clear the loft'.
 - Affordability, some people wouldn't be able to afford a new home, the cost of the moving process is a barrier, such as legal fees, stamp duty, paying for movers.
 - Wanting to hold on to homes as an asset (to pass to family or to pay for care/support).
 - Wanting to stay in their community but there is a lack of suitable choices nearby.
- The group expressed different views on paying for social care. Some people think that if you have means you should pay for your own care. Others think the system is unfair and have seen their families' assets liquidated when family members require social care, which means that they are more likely to hold on to their homes for longer rather than move, in case they need to pay for their care.
- The narrative around 'freeing up family homes' should an older person move from a larger home to a smaller one is off-putting and stigmatising for older people. This should be avoided at all costs.
- Any marketing that encourages older people to move to more suitable accommodation should focus on 'positive lifestyle choices' and not moving because someone is 'older' but because they choose to move. Whilst it is understood that 'rightsizing' is a term that aims to promote moving in later life as a more positive option, people think that this term won't be widely understood by people.

Notes from the qualitative research with professional stakeholders

Key messages from Caerphilly County Borough Council staff focus group

Views on staying put vs moving

- Many older people express a strong preference to stay put, especially if they are happy in their current home and community. Familiarity, established support networks and emotional attachment to the family home are powerful reasons for not wanting to move.
- Moving is often seen as stressful and overwhelming, particularly due to the logistics of decluttering, packing and organising a move after many years in one place. The lack of practical support and suitable alternatives further discourages moving.
- Moves in later life are triggered by crisis—such as health decline or bereavement—rather than by choice. People are more likely to move when they have no other option, rather than proactively seeking a better fit.

- However, some people—particularly in the “younger old” age group (50–65)—are more open to moving for lifestyle reasons, such as downsizing, reducing costs, or seeking a more manageable home. This group is more likely to consider moving before a crisis, but only if attractive, suitable options are available.
- There is a recognised gap in the market for housing that appeals to those who might move by choice, rather than necessity. The lack of such options means many people stay put even if their current home is not ideal.
- There is a mismatch between housing needs and preferences of older people and the current offer of CCBC housing. Most available stock is small flats, or in rare cases studios, provided by other RSLs, which don’t meet expectations (residents still want a second bedroom and private outdoor space). But also needs are not met as many homes are not suitable for people with age-related mobility needs.

Views on what would attract people to move/rightsize

- **Suitable Housing Options:** People are more likely to move if there are attractive alternatives that meet their preferences, especially two-bedroom properties with private gardens, accessible layouts (no stairs), and space for visitors or hobbies. Many do not want to move to small flats or traditional sheltered housing, but would consider well-designed, modern and flexible homes.
- **Types of Home:** Residents consistently say they want bungalows with small, manageable gardens. However, bungalows are ‘land-hungry’ and not sustainable to build at scale, raising the need for alternative attractive housing options. The Council’s view is that there is a need for more aspirational, well-designed homes for older people, of different types and sizes, to encourage people to move before a crisis.
- **Intergenerational:** Creating intergenerational and mixed-community housing is seen as beneficial, building mixed and vibrant communities.
- **Location:** Remaining in their existing community, close to friends, family and support networks, is a high priority. People are reluctant to move if it means leaving their familiar area.
- **Support with the Moving Process:** The logistics and stress of moving—especially decluttering, packing and organising utilities—are major barriers. Practical support with these tasks, sometimes even more than financial incentives, can make a significant difference.
- **Positive Perception and Communication:** People are more likely to move if the new housing is marketed as aspirational, independent, and community-oriented, rather than as a last resort or “old people’s” accommodation. Changing the narrative around moving in later life is seen as important.
- **Incentives:** Financial incentives (such as payments for giving up larger homes) have been used elsewhere and can help, but the most effective “incentive” is often the combination of a desirable new home and practical moving support.

Views on sheltered housing

- Many older people are reluctant to consider sheltered housing because of its reputation. It is often seen as only for the very old or frail, or associated with a loss of independence and a “load of old people sitting around playing bingo and knitting”.
- There is a strong stigma attached to the term “sheltered housing”, and some people believe it means needing a warden to do things for them, or that it is not truly independent living.

- This negative perception means that even people in their 70s may say, “I’m not old, I don’t want sheltered”, despite potentially benefiting from it.
- However, professionals report that once people move into sheltered housing, many are pleasantly surprised and say they wish they had known what it was really like sooner. The reality is often much better than the reputation suggests.
- There is a recognised need to change the narrative and improve communication about what sheltered housing offers, emphasizing independence, community and modern facilities rather than outdated stereotypes.
- The lack of “middle option” housing (between a large family home and sheltered housing) also drives people’s fixation on bungalows, which are seen as a more acceptable alternative.

Views on age-designated housing

- There is a large proportion of age-designated housing stock (over 2,000 homes) that is not fit for purpose for older people, and its sheer quantity masks the real need for better later living options.
- Much of the current age-designated housing stock is seen as a legacy of historical decisions, often made for reasons such as protecting properties from Right to Buy or assumptions about older people being quieter tenants.

Key messages from Caerphilly County Borough Council Older Persons Housing Manager

Willingness and likelihood of older people moving home

- When residents have interaction with our team it is usually because they are seeking sheltered accommodation, so the decision or prospect of moving has usually already been made so they are generally willing to make the move to more suitable sized accommodation. During viewings is usually our first interaction and residents usually state they are looking to move due to a decline in physical health, ability to manage correspondence and daily living (usually because of a mental health condition such as dementia), to feel more secure in their property or for the social interaction sheltered housing can offer. A move can also be considered due to poor accessibility of a current home due to steps or stairs.
- The likelihood of older people moving depends on the offer of accommodation available. Where there are high levels of sheltered accommodation or designated accommodation available in the desired area, it is more likely someone will be offered and make the move.

Views on existing supply of older persons’ accommodation

- Overall quality of the existing supply of older persons’ accommodation is generally good in the borough, especially those schemes that have undergone refurbishment/ remodelling. There are some issues with topography at some schemes, and a number of schemes are poorly designed for older people and their physical health needs. The team have a good understanding of what residents want and we interact and consult with our residents regularly to help shape the services within sheltered housing. CCBC also have a significant amount of general needs designated accommodation so availability is good. There is a lack of fully-adapted housing for those with significant physical health needs across all ages, not just for older people.

People's preferences and priorities for a new home

- During viewings we see a mixture of responses. Some schemes are highly desirable (usually those with generous sized flats or bungalows that have undergone refurbishment); residents are usually very happy when living in these settings and are able to live there for a significant period of time with some adaptations and OT involvement. We can have difficulty letting those properties with smaller spaces (bedrooms and living rooms) and those on upper floors or with external steps for access.

Priorities tend to fall into the following categories:

- Close to family
- Easy access to local amenities
- Close to transport links
- Level access living
- Accessible showering facilities
- Communal space to participate in activities
- Property large enough to accommodate flexible needs (storing of mobility equipment, to allow family or carers to stay, to be able to access easily for wheelchair users, accessibility of all rooms and fittings)
- Pendant alarm access and careline monitoring
- Access to support from the SHO or other agency.

Fears, barriers, and support needed

Barriers include:

- Being able to facilitate the actual move of all items
- Letting go of sentimental value a property may hold
- Having to compromise on 'wish list'; often residents have to weigh up the most important thing to them and often have to compromise on something whether that be location, property size or access to the community
- Family resistance (we often see this where residents chose to move frequently)
- Faith-related concerns (we have seen a case where a resident declined a move to the next village due to the church she attended being at the end of the street in which she currently lived)
- Communal living (especially under one roof) can be off-putting for some.

Fears include:

- Not being able to adjust to the smaller property
- Being further away from neighbours or friends or local amenities at current property

- Letting go of items and furniture as often residents have to down-scale belongings or purchase new to suit the new property
- Affordability can be a concern for some.

Support required often includes:

- Introductions to neighbours and encouragement to attend social activities to help the new resident feel part of their new community
- Setting up utilities, signing up with new services such as GP/dentist etc.
- Applying to authorities/organisations for address changes
- Being shown functions of new property; how boiler settings work, laundry machines etc., even bin collection days, especially for those who are not digitally confident
- Referrals for adaptations or support services.

Key messages from Registered Social Landlords focus group

The following Registered Social Landlords were in attendance: United Welsh, Wales and West Housing and Linc Cymru.

Views on older people in general needs housing

- Many older people prefer to remain in their own homes for as long as possible, and general needs housing often allows them to do so, especially if the property is suitably adapted.
- There are significant challenges in adapting general needs housing to meet the needs of older people, such as installing stairlifts, ramps or accessible kitchens. Record-keeping about adaptations is often poor, making it difficult to match properties to those who need them.
- There is frustration about adapting large family homes for single older people or couples, as this is not always an efficient use of housing stock, but there are few incentives or mechanisms to encourage downsizing.
- The group recognises the importance of supporting older people to live well in general needs housing, but also sees a need for more suitable, accessible and attractive options to encourage rightsizing when appropriate.
- There is a consensus that a range of housing choices is needed, including both general needs and specialist housing, to meet the diverse preferences and needs of older people.

Views on sheltered housing

- Traditional sheltered housing models are seen as increasingly outdated and less attractive to many older people, especially as support services (like wardens and communal activities) have been withdrawn due to funding cuts.
- The erosion of on-site support and communal services has reduced the appeal of sheltered housing, leading to increased social isolation among residents and making it harder to let some schemes, especially those in less desirable locations.
- There is a recognition that some local authorities (e.g. Cardiff) are reinvesting in the traditional model, with staff presence and activities, and these schemes are proving popular and in demand. This suggests that a well-resourced, service-rich sheltered housing offer can still be attractive.

- The group noted that the current resident profile in sheltered/retirement housing is more diverse, including younger people with complex needs (often due to homelessness or health issues), which can create challenges for community cohesion and management.
- There is a consensus that location is a critical factor in the success of sheltered housing; schemes in good locations are easier to let, regardless of the model.
- Some participants suggested that what is needed is a contemporary version of sheltered housing: high-quality, accessible, attractive homes with some level of age designation and optional support, rather than a return to the old model. The group mentioned Cardiff's Community Living programme as developing this type of housing and some people from their older persons' schemes had moved in.
- The group sees Cardiff's community living schemes as a potential model for success but also notes the need for more joined-up thinking and promotion of a range of housing options for older people.
- There is also a need for better strategic planning and investment to either refurbish, repurpose, or, in some cases, redevelop unsuitable sheltered housing stock.

Views on extra care housing

- Extra care housing is seen as a valuable option, especially for people whose health or care needs have increased, often following a crisis or hospital discharge. It provides a setting where care can be delivered flexibly as needs change. People tend to be driven to move into extra care following a health crisis.
- There is concern that extra care housing is increasingly being used for people with higher and more complex needs, shifting away from the original intention of a mix of low, medium, and high needs residents. This can change the dynamic of schemes and make them feel more like residential care, which may deter some older people from moving in.
- The group noted that extra care housing is not always well understood by the public, and there is a need for better communication about what it offers, especially so that people can move in with no care needs and age in place as their needs change.
- Some participants highlighted the importance of location and design, and the value of integrating extra care with other housing types (such as bungalows and general needs housing) to create more inclusive, community-based environments. Wales and West Housing are developing this approach in Bridgend.
- There is also a recognition that extra care housing should not be the only solution; a range of housing options is needed to meet the diverse preferences and needs of older people.

Barriers to moving

- The group identified several key barriers to moving or rightsizing for older people:
- Emotional and Practical Challenges: The process of decluttering, packing and moving is overwhelming, especially for those who have lived in their homes for many years. Emotional attachment to the family home and local community makes the idea of moving difficult.
- Lack of Suitable Housing Options: There is a shortage of attractive, accessible and appropriately sized homes (e.g. bungalows or high-quality flats) in desirable locations. Many available options do not meet older people's preferences, such as having enough space for visitors or a garden.

- **Insufficient Support:** Limited practical support for the moving process, including help with removals, decluttering, and settling into a new home. Some organisations offer signposting or limited hands-on help, but there is no consistent or comprehensive support system.
- **Financial Barriers:** Costs associated with moving, such as removals, can be prohibitive. There are few financial incentives for older people to downsize, especially for those above pension age.
- **Systemic and Policy Issues:** Allocation systems may not allow for much choice, leading to people being offered homes that do not suit their needs or preferences. Lack of coordination between housing, health, and social care can result in missed opportunities to support people to move at the right time.
- **Changing Resident Profiles:** The increasing diversity of residents in older persons' housing (including those with complex needs) can make some schemes less attractive.

About the Housing LIN

The Housing LIN is a sophisticated network bringing together over 15,000 housing, health and social care professionals in England, Wales and Scotland to exemplify innovative housing solutions for an ageing population. Recognised by government and industry as a leading 'ideas lab' on specialist/supported housing, our online and regional networked activities, and consultancy services:

- connect people, ideas and resources to inform and improve the range of housing that enables older and disabled people to live independently in a home of their choice
- provide insight and intelligence on latest funding, research, policy and practice to support sector learning and improvement
- showcase what's best in specialist/supported housing and feature innovative projects and services that demonstrate how lives of people have been transformed, and
- support commissioners and providers to review their existing provision and develop, test out and deliver solutions so that they are best placed to respond to their customers' changing needs and aspirations.

Find out more at: <https://www.housinglin.org.uk/>