

Older People's Housing Preferences

Report produced by Ipsos and Housing LIN

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Housing LIN

Connecting people, ideas and resources



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Summary

An ageing population is a significant demographic trend for the UK and across the developed world, with major implications for policymakers and society as a whole. By 2043, it is estimated that a quarter of the UK population will be over 65. This demographic shift will have significant implications for the housing market, with a growing need for age-appropriate housing options that meet their needs and requirements.

To help support and inform effective strategies to meet the housing requirements of older people, Ipsos and the Housing Learning & Improvement Network (Housing LIN) have conducted an extensive survey, using Ipsos's UK Knowledge Panel, based on more than 5,500 respondents that are representative of those aged 50 and over across the UK. This report draws extensively on survey findings to provide comprehensive and detailed evidence on the housing circumstances, preferences and aspirations of older people.

Among this group the survey highlights that the majority are aged between 50 to 64 and predominantly live in multi-person households, although a significant minority live on their own. A third self-report either a physical or mental health condition, while around a quarter have less than £26,000 per year in household income. More than eight in ten own their home, however those with lower incomes or self-reported health conditions are more likely to rent. Residential stability is also evident, with most having lived in their homes for over six years and nearly half for more than 20 years. However, those renting and with lower incomes tend to experience more frequent moves.

The majority currently live in a conventional home with fewer than one in twenty living in specialist housing. Some three-quarters live in homes with three or more bedrooms, although those under 65 typically occupy larger properties than those aged 75 and over. Over half report not having any adaptations in their homes, while two in five have at least one, such as a downstairs bathroom or step-free access. The majority of those without adaptations do not plan to add any in the next five years. Further, while two in five of this population believed their home would not be suitable if their needs changed, over half of this group felt that adding adaptations would make their homes suitable for future needs.

When asked about what makes a good home location is paramount, with proximity to services and amenities being crucial. Security, affordability, and suitable indoor and outdoor spaces are also highly valued. The majority are satisfied with their current housing situation, with most feeling safe and secure in their current home with the location, size and layout suitable for their needs. To improve the housing situation of people in later life, older people highlight the importance of a mix of options encompassing age-friendly modifications to existing homes, the development of new homes specifically designed to age related needs and requirements, as well as the provision of specialist housing options. The challenge it appears will be to develop balanced housing policies that can support both ageing in place and provide appealing and compelling alternative housing options for those seeking to move.

The survey explored the moving intentions and future housing expectations of older people in more detail. While most said they were unlikely to move within the next year, their outlook changes over longer periods. Three in ten expect to move within the next decade, with younger groups and renters showing a higher likelihood of moving. Looking ahead, most older people expect to remain in their current housing tenure, with homeownership dominating, and sentiment is strongest for bungalows, particularly among older age groups. Nearly three in five would expect to live in a smaller property than they currently live in,

highlighting the potential to address current supply mismatches provided the right housing options can be made available.

So, what might those future housing options be? Older people largely express a preference to remain in their current homes, with potential adaptations if needed. A majority thought that staying in their current home was most likely. While some are open to moving to a different conventional home, ideally designed with accessibility and adaptability in mind, the preference for specialist housing like sheltered, retirement or 'extra care' housing was weaker.

Remaining within the current home appears to be the preferred future housing scenario for most and thus policies to support ageing in place will be important. However, it is also evident that older people recognise the importance of a mix of housing options, and these will need to be appealing for those seeking to move in the future.

The survey highlighted that one of the strongest motivators for future moves will be for a smaller home – more than twice as many older people identified this as a reason for moving as identified access to local amenities or lower costs. The survey also highlighted other inertia factors that new housing solutions will need to consider too. Strong personal attachments to the current home and the complexity of the moving process are prominent among these. As are financial barriers including the costs of moving and housing affordability which are particularly more significant for social tenants and those with lower incomes.

Concerns about future financial stability and potential health-related needs will also need to be taken into consideration. Over half said they would be concerned about their ability to afford the service charges in specialist housing for older people where these would apply, while a third said they were more likely to move home only when they developed health problems. This suggests as the population continues to age, that future housing options will need to give greater consideration to how best to accommodate growing numbers of health-related moves.

This rich data source has provided some valuable insights into some of the key considerations for future housing options for older people. While the majority are content with their current homes and wish to age in place, support for adaptations and provision of specialist housing options will be important for some. Ensuring future older person housing options are of the right size, in the right place, are affordable and address financial concerns as well as prioritise ease of transition and take account of future health needs will all be essential considerations. Ultimately, a balanced approach that caters to both ageing in place while offering appealing alternatives will be paramount to effectively developing future housing options for the UK's ageing population.

Introduction

Context

With declining fertility rates and rising life expectancy rates the UK has seen a dramatic shift in its population structure resulting in the average age of the UK population increasing. Around one-fifth of the UK population (19%) was aged 65 or over in 2019, increasing by 23% since 2009 (compared to an increase of 7% across the UK population overall). By 2043 it is projected that people aged 65 and over will make up 24% of the UK population with 13% aged 75 and over and 4% aged 85 and over.

While improving life expectancy is a major achievement, presenting significant opportunities, it has major implications across our society, including for the labour market and wider economy as well as service provision. An ageing population also has major implications for the UK housing market; as we get older, our housing needs often change. Ensuring the right housing is available offers considerable benefits, enhancing the quality of life for people in later life, keeping us safe and healthy while supporting us to live independently and helping to reduce or delay costs for health and social care services.

Ensuring an ageing population is suitably housed also raises a number of important considerations for the housing market in terms of meeting people's needs and aspirations. Many existing homes do not meet the necessary standards to be considered 'age-friendly' or 'accessible'. This includes factors such as step-free access, downstairs toilet/bathroom facilities, and easy-to-use switches and controls. As people age, they may develop health conditions or disabilities that require adaptations to their homes or specific types of housing, placing greater emphasis on the need for integrated housing, health and social care services.

The affordability of suitable housing choices is a concern for many reliant on pensions and benefits as well as older people not reliant on benefits but with modest incomes. The rise in older people living in rented accommodation has raised concerns around the need for affordable rented housing options and for those in private rented accommodation concerns about living conditions and security.

A combination of supply and affordability factors, alongside emotional ties such as the desire to stay in an existing home and living in existing communities, close to friends, family, and familiar amenities has also seen a rise in levels of people choosing to stay put. Older people living in family-sized homes, often with spare or underused rooms, has helped contribute to mismatches between demand and supply across the wider housing market. Enabling older people to move to more suitable housing that is attractive and meets their needs, when they want to, can help to free up larger homes for use by families.

The introduction of financial support through schemes such as the Disabled Facilities Grant helping older or disabled people make necessary adaptations to their homes and the National Planning Policy Framework encouraging local councils to consider the housing needs of older people in their Local Plans all point to the importance UK Government places on ensuring older people are suitably housed with equivalent policies in Northern Ireland, Scotland and Wales. The issue of how to house an ageing population both now and in the future is thus an increasingly important consideration for housing policy makers and providers.

The findings of the independent research presented in this report seek to significantly enhance the evidence base in relation to the housing perceptions and preferences of older people to help inform future housing policy, planning and delivery.

Aims and objectives

The Housing Learning & Improvement Network (Housing LIN) has commissioned Ipsos to conduct a large-scale nationally representative survey of the UK population aged 50 and over to better understand the housing needs and preferences of the UK's older population. The primary objective of the study is to create the most up to date, robust and comprehensive evidence base in the UK of the housing needs and aspirations of the older population. This evidence will inform and support policy makers and housing providers to help plan and deliver transformation in the UK housing market to best deliver suitable housing and accommodation choices for the older population.

The study is comprised of two stages. Stage 1 aims to provide up to date and robust evidence on the current and future housing preferences of the older population in the UK, including the experiences, preferences, and requirements of people currently aged 50 and over. It aims to identify their needs and requirements together with the barriers and enablers to meet these needs, as well as the preferences for housing options in later life and an assessment of the likelihood of older people remaining in their homes or moving to an alternative type of housing.

Stage 2 of the study will draw on the evidence base derived from Stage 1 and other evidence to create a new model for estimating the need for different types of housing and accommodation for older persons in the UK. This model will be produced by Ipsos and the Housing LIN to help inform UK public bodies, primarily local authorities, in the planning and delivery of a range of housing options suited to the needs and preferences of the UK's older population.

This report summarises key findings from the Stage 1 research component. It draws on evidence collected using the Ipsos KnowledgePanel to provide robust and detailed information on the views, attitudes and housing preferences of UK adults aged 50 and over. Further details on the approach used for Stage 1 are presented below.

Methodology

KnowledgePanel methodology

The survey was conducted using Ipsos KnowledgePanel which has been developed to provide a premium and reliable source of nationally representative data at speed. To ensure high quality, nationally representative samples Ipsos has invested heavily in KnowledgePanel to overcome known limitations of online panels (including self-selection bias, non-representation from the digitally excluded and time sensitisation through poor panel management). Key attributes of Ipsos KnowledgePanel are summarised below.

Recruitment to the panel

Panelists are recruited via a random probability unclustered address-based sampling method (the gold-standard sampling approach). This means that every household in the UK has a known chance of being selected to join the panel. Letters are sent to selected addresses in the UK (using the Postcode Address File) inviting them to become members of the panel. Invited members are able to sign up to the panel by completing a short online questionnaire or by returning a paper form. Up to 2 members of the household are able to sign up to the panel. Members of the public who are digitally excluded are able to register to the KnowledgePanel either by post or by telephone, and are given a tablet, an email address, and basic internet access which allows them to complete surveys online.

Conducting the survey

The survey was designed using a 'mobile-first' approach, taking into consideration the look, feel and usability of a questionnaire on a mobile device. This included: a thorough review of the questionnaire length to ensure it would not over burden respondents from focusing on a small screen for a lengthy period, avoiding the use of grid style questions (instead using question loops which are more mobile friendly) and making questions 'finger-friendly' so they're easy to respond to. The questionnaire was also compatible with screen reader software to help those requiring further accessibility. As part of a comprehensive panel management programme, Ipsos takes care to ensure that panellists are not over-researched or become conditioned and continuously monitor panel health via fresh recruitment.

Sample and weighting

The KnowledgePanel is a random probability survey panel. Therefore, the KnowledgePanel does not use a quota approach when conducting surveys. Instead invited samples are stratified when conducting waves to account for any profile skews within the panel. The sample was stratified by country and education.

The survey was conducted through Ipsos KnowledgePanel between **7th December – 13th December 2023**. A total of 8,851 panellists in United Kingdom (aged 50+) were selected and invited to take part in the survey. Of these, 5,591 respondents completed the survey – a response rate of 63%.

To ensure survey results are representative of the target population, design and calibration weights have been applied using the latest population statistics for each individual UK nation. An additional weight has been created and applied for the United Kingdom to account for any over or under sampling within each country.

Further details on the approach and the weighting profile targets used for each country can be found at Annex A of this document.

Interpreting the data

KnowledgePanel is a highly cost-effective method to generate large, representative samples. For this study it has generated a significant volume of responses from adults aged 50 or more across the four UK nations. Data has been weighted to be representative of the adult population aged 50 or more within each country with an additional UK weight applied to match the overall UK profile of those aged 50 or more. As such the survey has been designed to generate nationally representative UK and individual country samples.

It should also be remembered that a sample, rather than the entire population of all UK adults aged 50 or more, has taken part in the survey. This means that all results presented in the report are subject to sampling tolerances. We have sought to focus commentary on findings that are statistically significantly different but not all data presented will be. A further explanation of statistical reliability is included in Annex A.

For the analysis presented in this report we have focussed on sub-groups of the UK adult population aged 50 or more that are of particular relevance or interest to the survey topic. This includes commentary on key differences by age group (50-64, 65-74 and 75+), tenure (owner-occupiers, social and private renters), income (under £26,000, £26,000-£51,999, £52,000-£99,999 and £100,000+), ethnic group (White and ethnic minority background) and health condition (with and without a health condition).

In the case of health condition, this has been self-defined by the participant in response to a set of standard questions in the survey questionnaire. A copy of the full survey questionnaire can be found at Annex B.

KnowledgePanel also includes a wide range of additional socio-demographic information collected on panellists including work status, education, social grade, geography and Index of Multiple Deprivation (IMD). A detailed breakdown of results by these variables is included in a comprehensive set of data tables supporting this report.

In the remainder of this section, we consider some of the key demographic attributes of the sample before considering survey results in greater detail in the rest of the report.

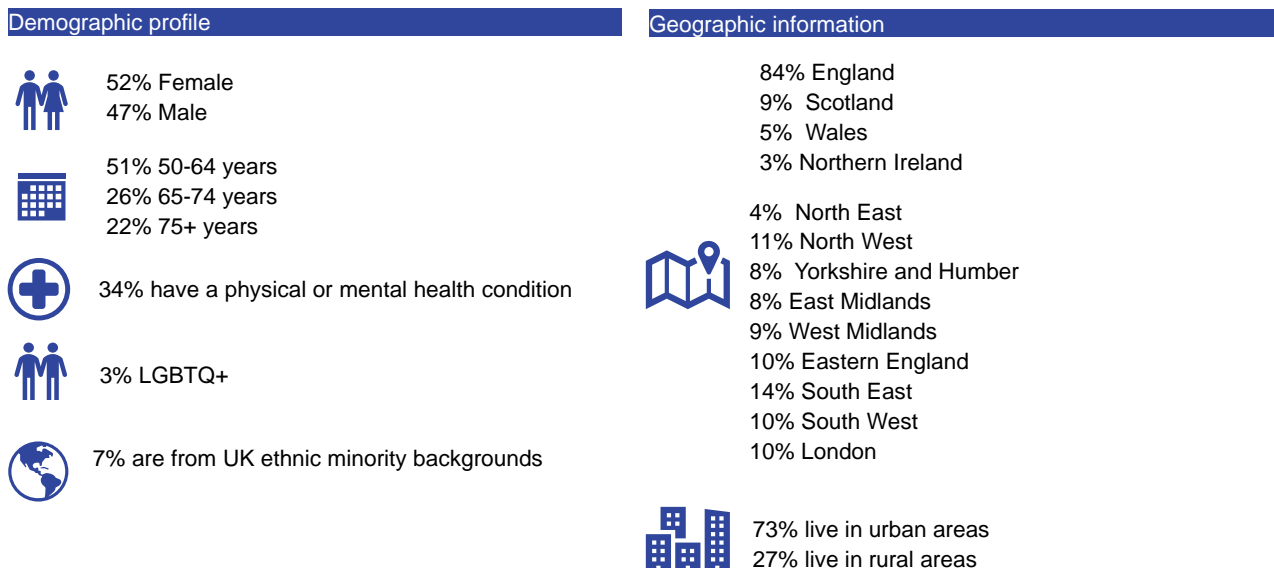
Demographic information

The survey, of 5,591 individuals aged 50 and above, provides a comprehensive demographic profile. Weighted results indicate that half the sample (52%) are female and 47% are male while 51% fall between the ages of 50-64, 26% fall within the 65-74 range, and 22% are 75 and above. Notably, 34% also reported having a physical or mental health condition.

Geographically, the majority (84%) of respondents lived in England, 9% lived in Scotland, 5% lived in Wales, and 3% lived in Northern Ireland. Among those aged 50 and above living in England, the regions with the highest proportions included the South East (14%), North West (11%), South West (10%), Eastern England (10%) and London (10%) Additionally, 73% of participants resided in urban areas, while 27% were in rural settings.

Figure 1.1: Demographic profile and geographic information

All UK Adults aged 50+ (n= 5591)



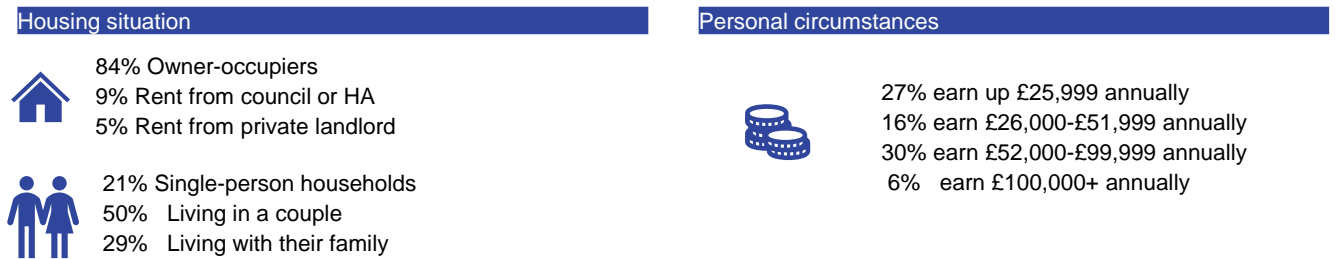
Base: All UK adults aged 50+ (5591). Totals may not add to 100% due to rounding and not all options shown on slide.

A significant majority, comprising 84% of respondents, identified as owner-occupiers, 9% reported renting from a council or housing association, and 5% rented from a private landlord. In terms of household composition, 21% lived in single-person households, 50% in couple arrangements, and 29% lived with their family.

The annual income distribution mirrored the broader UK averages, with 27% earning up to £25,999, 16% earning between £26,000 and £51,999, 30% earning between £52,000 and £99,999, and 6% reporting an income of £100,000 or more.

Figure 1.2: Housing situation and personal circumstances

All UK Adults aged 50+ (n= 5591)



Base: All UK adults aged 50+ (5591). Totals may not add to 100% due to rounding and not all options shown on slide.

Older people's housing situation

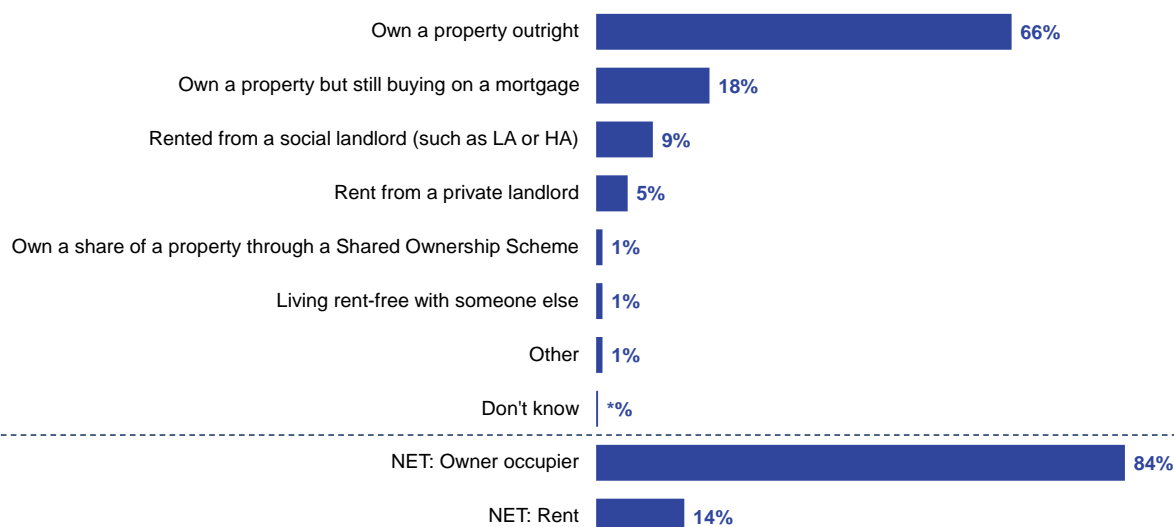
In this section we consider the housing situation of those aged 50 and over in relation to their tenure and type of accommodation, the size and time spent in their current property and their household composition.

Housing tenure

The overwhelming majority of respondents aged 50 or more were owner-occupiers. More than eight in ten (84%) were owner-occupiers – this was made up of two thirds (66%) who owned their property outright and 18% who owned with a mortgage. One in seven (14%) were renting, with 9% renting from a social landlord and 5% renting from a private landlord.

Figure 1.3: Housing Tenure

Q1. Which of the following best describes your current housing situation?



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

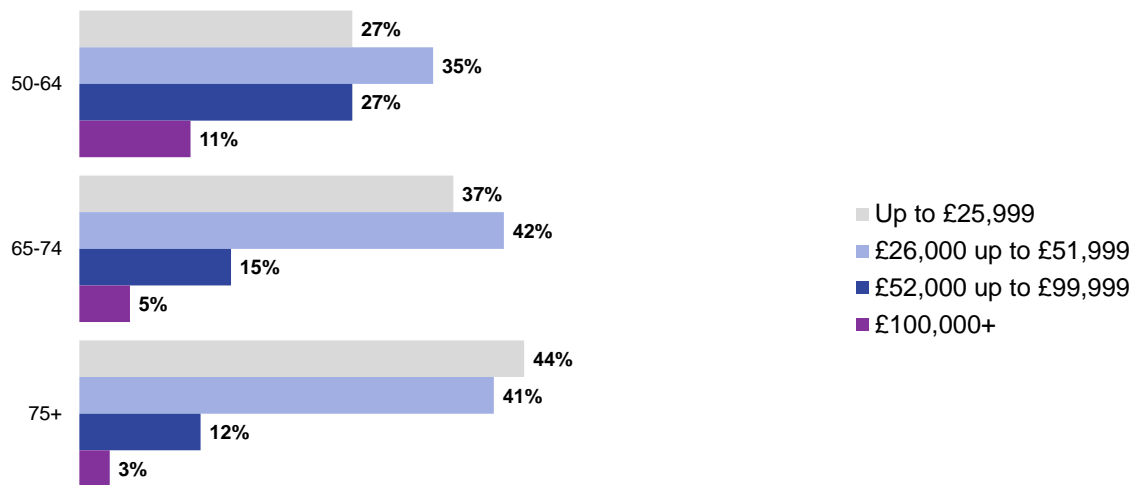
There were some key differences in tenure by demographics. Around eight in ten of those aged 65-74 (82%) owned their property outright, compared to 66% overall, and this increases to 88% for those aged 75+. This might suggest that those aged 65 and older have the biggest potential to release equity through moving or downsizing, assuming their current property is of higher value. Those aged 50-64 were more likely to be paying a mortgage (31% vs. 18% overall), renting from a private landlord (7% vs. 5% overall), and renting from a social landlord (11% vs. 9% overall).

There were also some differences by ethnicity with white adults more likely to be owner-occupiers (67% compared to 45% of ethnic minorities). In contrast, ethnic minority groups were more likely to be renting from a private landlord (8% vs. 5% overall) or renting from a social landlord (16% vs 9% overall).

Housing tenure is also closely associated with income levels. Those in the lowest income band (earning up to £25,999) were significantly more likely to be renting (26% vs. 14% overall) while those in higher income bands were more likely than average to own with a mortgage. One third (34%) of those earning £52,000- £99,999 owned with a mortgage compared to 18% overall, reflecting many in these income

bands are still working. Those earning £26,000-£51,999 were more likely to own their property outright (70% vs. 66%). Further analysis shows some income variability in age, as highlighted in the figure below.

Figure 1.4: Annual household income by age group



Base: All UK adults aged 50+ (5500); Fieldwork dates: 7-13 December 2023

Survey evidence indicates there's some geographical variability as well. Those living in Wales and Northern Ireland were more likely to own their property outright (73% and 75% respectively vs. 66% overall), whereas those living in Scotland were more likely than average to be renting from a social landlord (12% vs. 9% overall). Across the English regions, the highest proportion of owner-occupiers were seen in East Midland and East of England (89% vs. 84% overall) while London had the highest proportion of renters (23% vs. 14% overall).

The survey also highlights differences in tenure by current health condition. Those with a health condition were significantly more likely to be renting than those without - 20% compared to 10% of those without. Further analysis also highlights that those in the most deprived IMD Quintile (1) are significantly more likely to have a health condition; 41% of those in Quintile 1 reported a physical or mental health condition, compared to 34% overall.

Type of housing

The majority (97%) of UK adults are currently living in a conventional home, for the purposes of this survey described as '*property occupied by the majority of the population such as homes purchased in the open market, property rented from a private landlord or general needs housing rented from a local council or housing association*'. Less than one in twenty say they are living in types of specialist housing, including 1% living in sheltered or retirement housing and less than 1% living in extra care housing.

Figure 1.5: Type of Housing

Q2. Which of the following best describes the type of housing you currently live in?



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

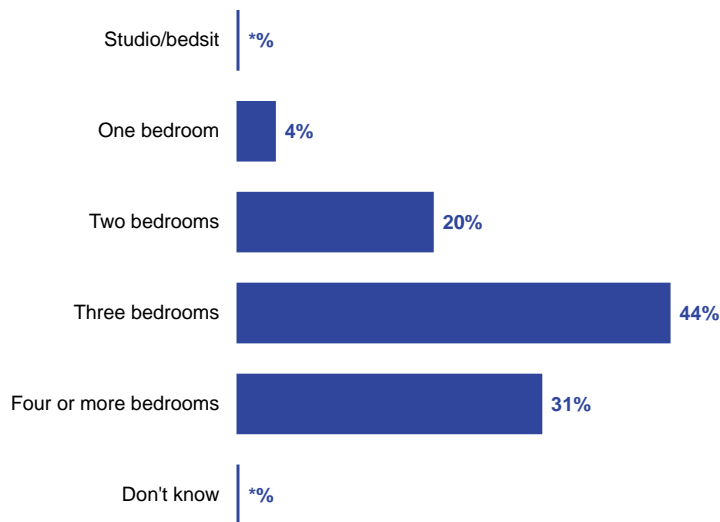
Size of home

The majority of UK adults aged 50 or more lived in a larger property, with three or more bedrooms. Three quarters lived in a home with three or more bedrooms - more than four in ten (44%) had three bedrooms and three in ten (31%) had four or more. One fifth (20%) had two bedrooms, while 4% lived in a home with one bedroom.

Further analysis shows that 25% of those who had three or more rooms said they would want to move in the next 6-10 years. Of those that had three bedrooms, 60% said they would expect to have two bedrooms if they moved to a different home, and just below two thirds (32%) would expect to have three bedrooms. For those who had four or more bedrooms, just below a half (48%) would expect to have three bedrooms, and two thirds (36%) would expect two bedrooms. This data therefore suggests that although some 50+ are willing to move to a smaller property with two bedrooms, it could potentially be challenging to encourage the majority of people with larger properties to downsize. Although some of this cohort may want to move, they may want to move to a property of similar size as their current one.

Figure 1.6: Number of bedrooms

Q6. How many bedrooms does your current home have?



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

Across sub groups of the UK adult population aged 50 or more, there were some variations in the number of bedrooms in their current homes. Those aged 50-64 were more likely than the average to live in property with four or more bedrooms (33%) while those over 75 were more likely than average to be living in two-bedroom property (24%). There were also marked differences by tenure with renters more likely to be living in smaller property – 23% of social tenants and 9% of private renters lived in one-bedroom property (compared to 4% overall).

Income levels and health condition are also associated with property size variations. Those with income below £26,000 were more likely to have either one bedroom (10% vs. 4% overall) or two bedrooms (34% vs. 20% overall), and those earning £26,000 up to £51,999 were more likely to have three bedrooms (49% vs. 44% overall). Those earning £52,000 up to £99,999 and £100,000+ were more likely to live in a home with four or more bedrooms (49% and 59% vs. 31% overall). Those with a health condition were four times more likely than those without to live in a home with one bedroom (8% vs 2% of those without) while those without a health condition were more likely to live in a home with four or more bedrooms (35% vs. 24% of those with).

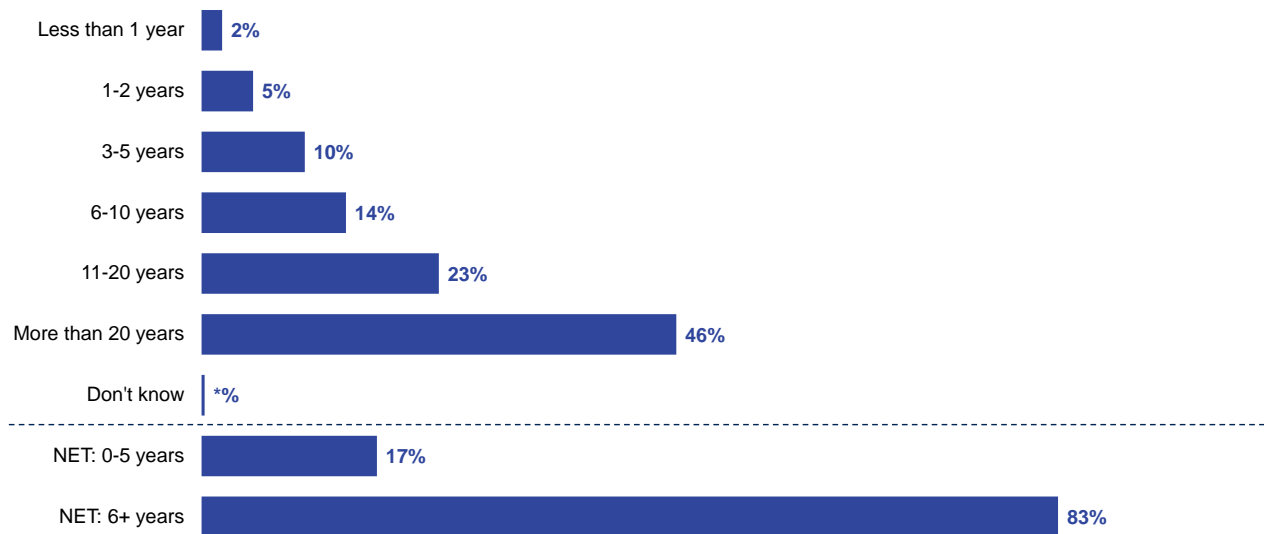
Those living in urban areas were more likely to live in a smaller property than those in rural areas reflecting regional differences seen across England. Those living in London were more likely to live in one-bedroom property (8% vs. 4% overall), while those living in the South East and the South West were all more likely than average to have four bedrooms.

Length of time in current home

Most UK adults aged 50 or more had lived in their property over the long-term; eight in ten (83%) had lived in their current property for 6+ years, compared to just 17% who had lived there for 5 years or less. Furthermore, just below half (46%) had lived in their property for more than 20 years and just below a quarter (23%) had lived there for 11-20 years.

Figure 1.7: Length of time in current home

Q4. Thinking about your current home, for how long have you lived there?



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

Across the UK adult population there are some marked variations in duration in the current home, most notably by tenure. Those renting were significantly more likely to have lived in their current home for five years or less – four in ten (39%) private renters and one in five (22%) social tenants, compared to 15% of owner-occupiers. In contrast, half (50%) of all owner-occupiers have lived in their current home for more than 20 years.

The survey also indicates that those in older age bands were more likely than average to have lived in their home for more than 20 years - 54% of those aged 65-74 and 57% of those aged 75+ vs. 46% overall. Longer duration within the existing home may foster stronger connections and attachments to the existing home among these older age cohorts meaning alternative housing options will likely need to be highly appealing to persuade people to move. We consider further some of the main 'push' and 'pull' factors around household moves later in this report.

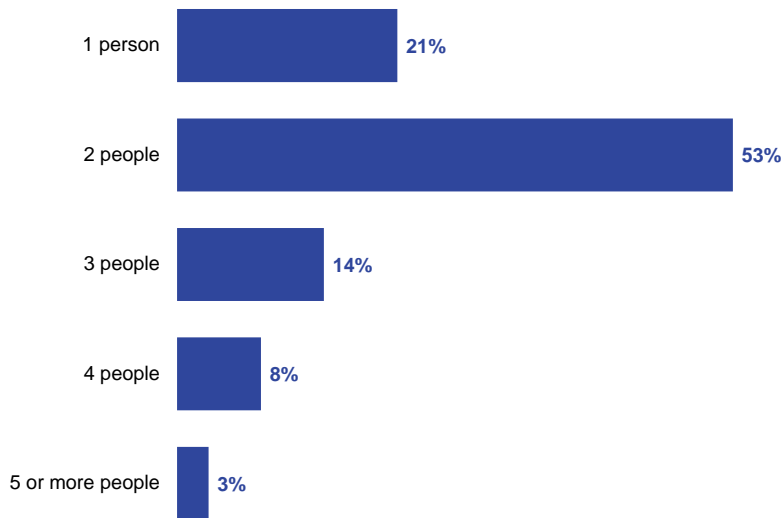
Income levels too appear to be an important influencing factor with those on the lowest incomes (under £26,000) more likely than average to have been in a property for five years or less (20% had lived in their property for 0-5 years vs. 17% overall) while those in the highest income band (£100,000+) were more likely than average to have lived in their property for 11-20 years (30% vs. 23% overall). Further consideration is given to some of the barriers and enablers to moving home later in this report.

Housing composition

The average household size across all UK adults aged 50 or more is 2.18 persons per household. Nearly three quarters (74%) lived in households with one or two people – one in five (21%) lived in single person households while over a half (53%) lived in two-person households. A quarter lived in households with three or more people and those in the youngest age band (50-64) were more likely than average to live in larger households – 40% live in households with three or more people vs 25% overall.

Figure 1.8: Number of people in household

Q5. How many people, including yourself, currently live in your household?



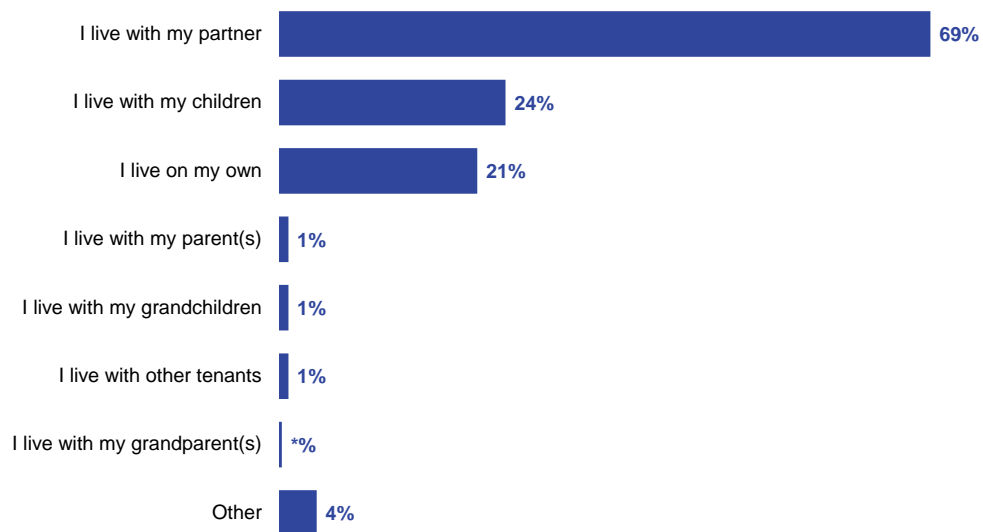
Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

Around seven in ten (69%) of all UK adults aged 50 or more lived with their partner, a quarter (24%) lived with their children, whilst one in five (21%) lived on their own. Those in the oldest age band (75+) were more likely than average to be living alone (34%), however, the majority of people in this age band live in households of two or more. Respondents in the youngest age band (50-64) were more likely to be living with their children (34% vs. 24% overall). Survey results indicate that a majority of those aged 50 or more are living in households with more than one person. This suggests that alternative housing options aimed at older people will need to be able to cater for the needs of older households that typically have more than one person.

Those with a health condition and those currently renting were more likely than average to be living alone – 27% and 31% respectively vs 21% overall.

Figure 1.9: Household composition

Q7. Still thinking about your current home, who lives there with you?



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

Satisfaction with current housing

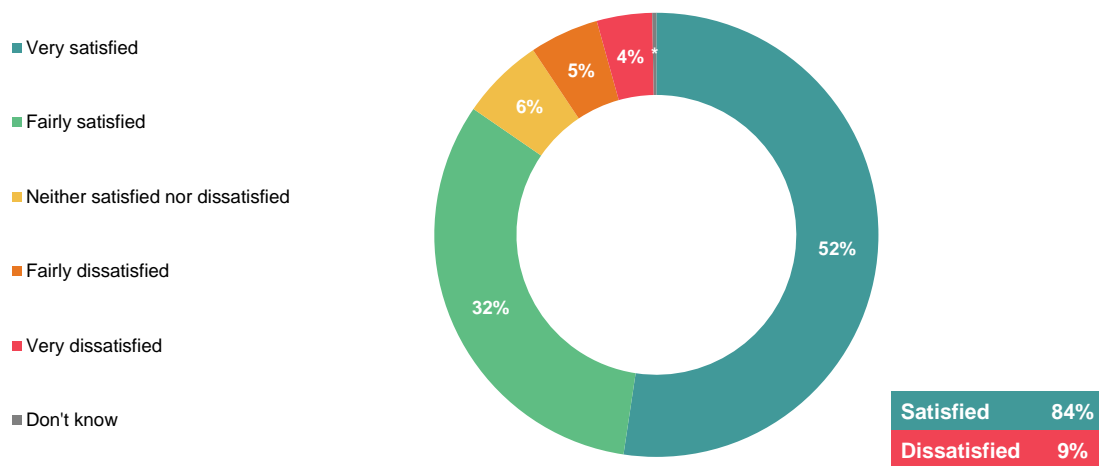
In this section we consider how satisfied those aged 50 and over were with their current home and their sentiments around a range of home attributes. For those who have moved to their current home within the last five years we also consider some of the main evidence for the move.

Satisfaction with current home

The majority of UK adults aged 50 or more said they were satisfied with their current home. Overall, over eight in ten (84%) said they were satisfied with over half (52%) saying they were 'very satisfied'. Fewer than one in ten (9%) said they were dissatisfied with their current home.

Figure 1.10: Overall satisfaction with current home

Q8. Overall, how satisfied or dissatisfied are you with your current home?



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

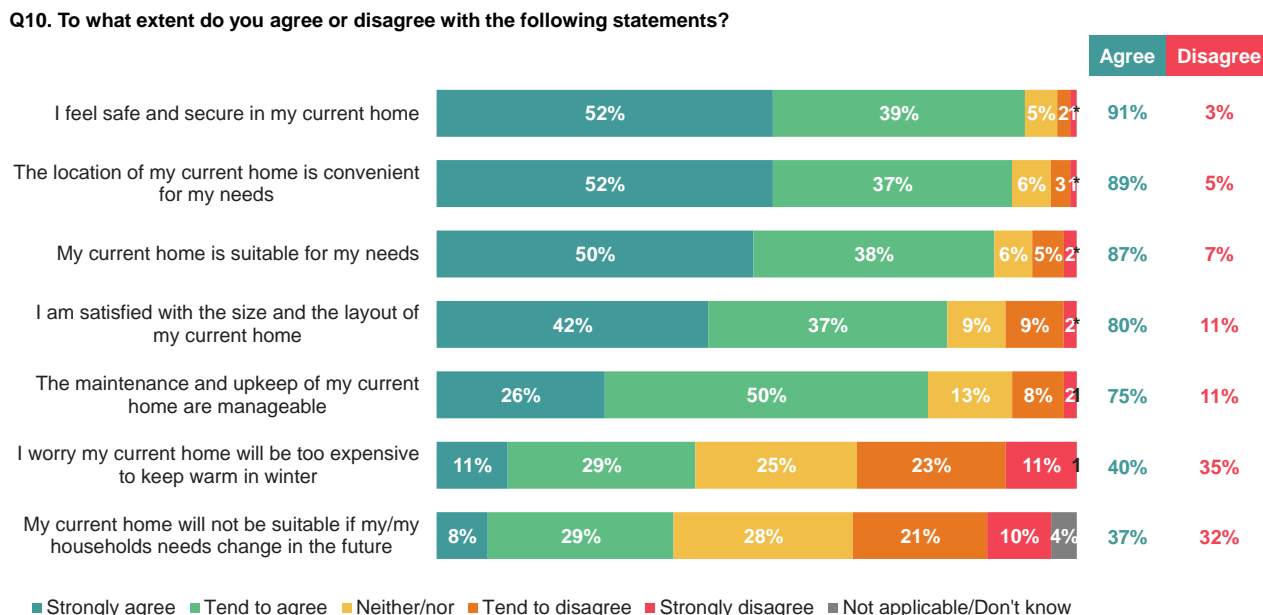
Satisfaction with current home is closely associated with age, tenure, income and health characteristics. Those in the older age cohort of 75+ were more satisfied than average (87% vs. 84% overall), as were owner-occupiers (86%), suggesting that they will need appealing and compelling alternative housing options to encourage them to move. Other groups that had higher satisfaction than average included those from a white ethnic background (86%), those with income of £100,000+ (91%) and those without a health condition (87%).

In contrast, private (16%) and social renters (18%) are more likely than average to be dissatisfied with their current home. Other groups more likely than average to be dissatisfied with their current home were those from an ethnic minority background (18%), those with incomes less than £26,000 (12%), those living in London (14%) and those with a health condition (13%).

When asked about particular attributes of their home, nine in ten UK adults aged 50 or more (91%) agreed they felt safe and secure in their current home and a similar amount (89%) agreed the location of their current home was convenient for their needs. Furthermore, a large majority agreed that their current home was suitable for their needs (87%) and that they were satisfied with the size and layout (80%).

In contrast, older people are concerned about the cost of heating their home and a significant proportion do not think their current home will be suitable for them in later life. Two in five (40%) agreed they were worried that their current home would be too expensive to heat in the future, suggesting that alternative housing options that are more affordable to manage is an important attribute for some older persons. One third (37%) agreed that their current home will not be suitable if their needs change in the future.

Figure 1.11: Satisfaction with attributes of the current home



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

Owners (89%), those from a white background (88%), those with income above £52,000 (91%) and those without a health condition (91%) were the sub-groups more likely to agree that their current home is suitable for their needs, while those from an ethnic minority background (16%), renters (14%) and those with a health condition (10%) were more likely to disagree that their current home is suitable for their needs.

Concern around the cost of heating the home was highest among private renters (63% vs 40% overall) and to a lesser extent social renters (56%), while those from an ethnic minority background (51%), those in the lowest income group (50%) those with a health condition (48%) and those in the youngest age band (45%) all demonstrated levels of concern above the average.

Private renters were also most likely to have agreed that their current home will not be suitable if their needs change in the future. Nearly half (48%) of all private renters agreed compared to 37% overall. Those with a health condition were also more likely than the average (43%) to agree their current home will not be suitable if their needs change.

Reasons for moving (recent movers)

Around one in five respondents (18%) had moved to their current home in the past five years. Those respondents were then asked what the most important reasons for moving were. Participants could identify up to three reasons. Nearly three in ten (28%) of UK adults aged 50 or more who had moved within the last five years said they had moved to a nicer home or to a better neighbourhood/more pleasant area (26%). Nearly a quarter (23%) had moved to a smaller property, while one in five (21%)

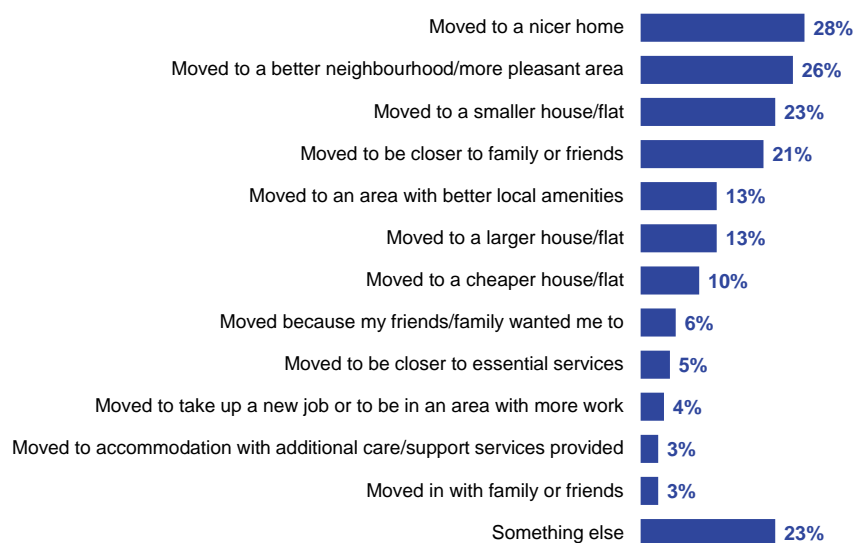
moved to be closer to family or friends. There were also 13% of respondents that had moved to a larger house or flat.

Survey data suggests that quality of the home and location were the most important factors encouraging a move, although downsizing to a smaller property was a motivator for moving for a sizeable minority of older persons.

Just under a quarter (23%) selected 'something else' as a reason for moving. This included common themes, such as, moving to a bungalow, divorce or separation, moving somewhere with outdoor space/a garden, and moving due to their private landlord selling the house.

Figure 1.12: Reasons for moving to their current home

Q12. You said you moved into your current home within the last five years, which two or three of the following were the most important reasons for moving to your current home?



Base: All those who have moved into their current home within the last 5 years (1002); Fieldwork dates: 7-13 December 2023

Those most likely to have said they moved to a **nicer home** included those aged 50-64 (31%), owner-occupiers (31%), those on the highest income of £100,000+ (46%) and those without a health condition (31%). A similar pattern was observed for those who said they moved to a **better neighbourhood/pleasant area** with those in the youngest age bands, owners and those without a health condition more likely than their sub-group counterparts to give this as a reason for moving.

Those who moved to a **smaller property** were more likely to be in older age groups. Over a third of those aged 75+ (37%) and three in ten of those aged 65-74 (29%) who had moved, moved to a smaller property compared to 17% of those aged 50-64. Owner-occupiers were also more likely to have moved to a smaller property than renters – 27% of owners vs 21% of social tenants and 8% of private tenants. Single person households were also more likely than the average to have moved to a smaller property (31% vs 23% overall). This data suggests, therefore, that downsizing is an important motivator for moving for a sizeable minority of those aged 65+, particularly amongst owner-occupiers.

Moving to be **closer to family and friends** was also a strong driver to move for older age groups, those with a health condition and those living on their own. Around one in three of those aged 75+ (34%) and 28% of those aged 65-74 moved to be closer to family and friends compared to 15% of those aged 50-

64. More than a quarter of those with a health condition (28%) and those living alone (27%) also sought proximity to family and friends from their last move, compared to 21% overall.

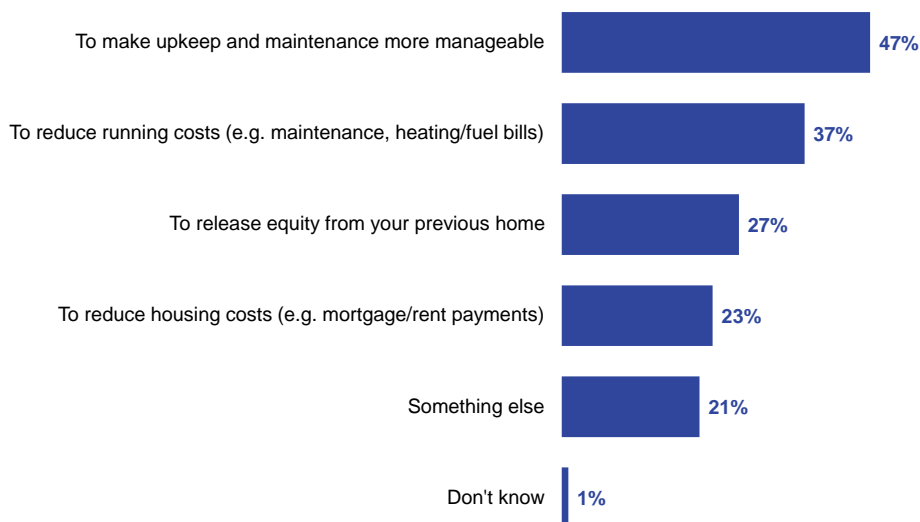
Reasons for moving to smaller property

Nearly a quarter (23%) of all those UK adults aged 50 and over who had moved to their current home within the last five years, indicated they had moved to a smaller property. Further analysis of the data indicates the majority moved to a conventional smaller home (94%), and a small percentage moved to specialist housing, such as sheltered or retirement housing (3%).

Those who moved to a smaller property were then asked why they moved for this reason. Just under half (47%) said they moved to a smaller property to make the upkeep and maintenance more manageable. More than a third (37%) said they wanted to reduce running costs, and more than a quarter (27%) wanted to release equity from their previous home. Over one in five (23%) said the reason was to reduce housing costs, meaning their rent or mortgage payments.

Figure 1.13: Reasons for moving to a smaller property

Q13. You said you moved to a smaller or cheaper property, why was that?



Base: All those who moved to a smaller or cheaper property in the last 5 years (301); Fieldwork dates: 7-13 December 2023

Although only indicative due to small base sizes, the survey suggests that moving to a smaller property to **make upkeep more manageable** was more of a driver for older age groups (65+) as well as owner-occupiers (52%) when compared to renters (22%). Across all age groups, those aged 65-74 were most likely to move to a smaller property to **reduce running costs** (55% vs. 37% overall), while moving to a smaller property to **reduce housing costs** appears to be more of a driver for those aged 50-64 (36%) and those with a health condition (32%).

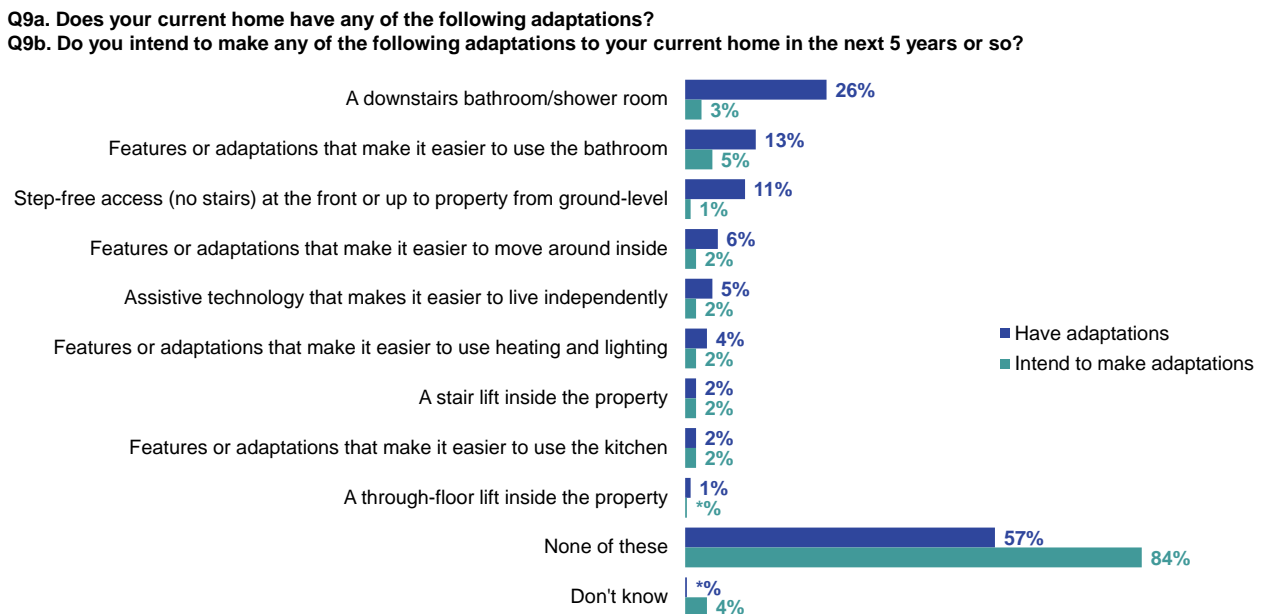
Adaptations to current home

In this section we consider the extent to which older persons' current homes have been adapted for living in later life, the most common types of adaptations and intentions to make adaptations in the future.

Current adaptations and future intentions

Over half (57%) of all UK adults aged 50 or more said they didn't have any adaptations at all to their current home, while around two in five (43%) indicated the presence of at least one adaptation. The most common adaptation was a downstairs bath or shower, with a quarter (26%) saying they had this feature. Other relatively common adaptations were features that made it easier to use the bathroom (13%) and step-free access at the front or up to the property (11%).

Figure 1.14: Current adaptations and intentions for the future



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

A quarter of UK adults aged 50 or more identified the presence of one adaptation within their current home, 10% identified two and 7% identified three or more adaptations within their home. Those in the oldest age group (75+), those with a current health condition and social renting tenants were more likely to be living in a home with at least one adaptation.

The most likely cohort to have already made adaptations were those aged 75 and over, as over half (55%) had at least one adaptation. Those in this group are more likely than average to live in a home with a downstairs bathroom (32% vs. 26%), with features making it easier to use the bathroom (20% vs. 13%) and step-free access (17% vs. 11%).

Those with a current health condition were significantly more likely than those without to have at least one adaptation within their home (49%), including adaptations that make it easier to use the bathroom (20% vs. 10%), step-free access (14% vs. 10%), and features that make it easier to move around the house (10% vs. 4%).

In terms of housing tenure, two-thirds (67%) of private renters were living in a home with no adaptations while 46% of all social renters were living in a home with at least one adaptation. Social tenants were more likely to have adaptations to make it easier to use the bathroom (24% vs. 13% overall), step-free access (18% vs. 11% overall), and features or adaptations making it easier to move around inside (15% vs. 6% overall).

The survey also asked about future intentions to get any of the adaptations listed within the next five years. Overall, more than eight in ten (84%) UK adults aged 50 or more said they did not intend to get any of the adaptations or features listed at all. Those in younger age groups (50-64 and 65-74) were more likely than those aged 75+ to say they have no intentions to make adaptations (86% and 84% vs. 77% aged 75+).

Furthermore, among those that stated they currently had no adaptations to their home, those stating they had no intentions to make adaptations increased to 87%. This suggests that while a sizeable minority of older people live in adapted property already, a majority do not intend to make them more suitable in later life through further adaptations.

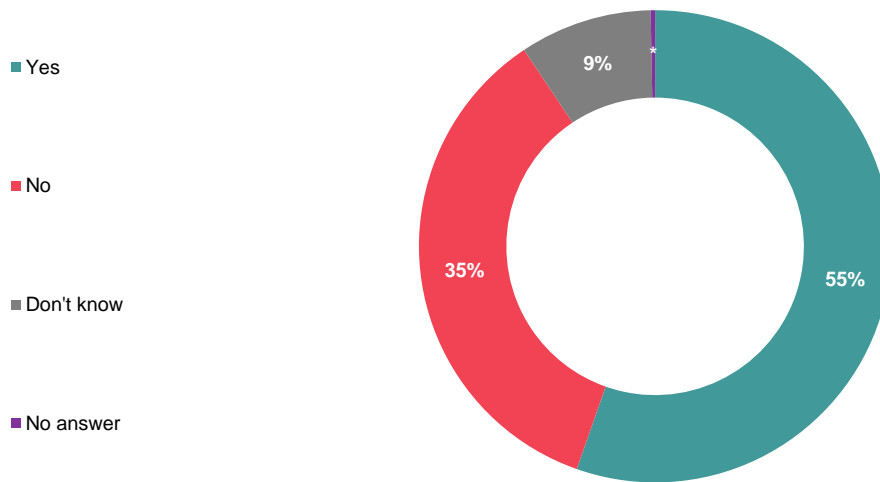
Among those with no adaptations currently, adding features that make it easier to use the bathroom (e.g. a wet room/ level access) was most commonly identified, although fewer than one in twenty (4%) said they intended to make this adaptation within the next five years.

[Adaptations to meet future household needs](#)

Nearly two in five (37%) UK adults aged 50 or more agreed that their current home will not be suitable if their household needs change in the future. Those who agreed were also asked whether their current home would be made suitable for their needs in the future if adaptations (such as a stairlift, wet-room/walk-in shower, wider doors, ramps, grab rails, downstairs bathroom) were made. A majority of over half (55%) said their home would be made suitable for their future needs, whilst a third (35%) said it would not.

Figure 1.15: Future adaptations to current home

Q11. If adaptations (such as stairlift, wet-room/walk-in shower, wider doors, ramps, grab rails, downstairs bathroom) were made to your current home, would this make it more suitable to meet your/your households needs in the future?



Base: All those whose current home will not be suitable if their needs change in the future (2065); Fieldwork dates: 7-13 December 2023

Overall, one in five (21%) of all UK adults aged 50 or more considered that making adaptations to their current home would make it more suitable if their needs changed in the future. In contrast around one in eight (13%) considered that making adaptations would not make their home more suitable if their needs changed in the future, suggesting a move to an alternative home may better suit their changing needs. Those renting from a private landlord were most likely to consider that their current home will not be suitable if their needs change and that inclusion of adaptations would not make it more suitable for them (22% of private renters vs. 13% overall).

What makes a good home

In this section we consider the perceptions around what makes a good home as well as views on the most important housing options that UK adults over 50 think may help improve the housing situation for people in later life.

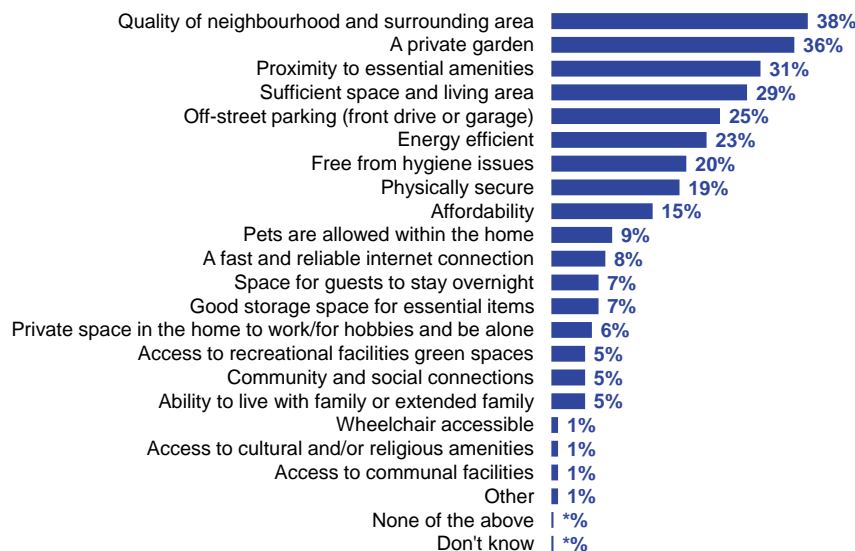
Preferences for a good home

When asked about the most important attributes that make a good home, it was evident that a good home encompasses more than just its physical structure; factors such as location, affordability, and other property-related factors are also important. Nearly two in five UK adults aged 50 or more said the quality of the neighbourhood and surrounding area (38%) was important, the most commonly mentioned of all attributes, while three in ten said proximity to essential amenities (31%) was important. Attributes relating to the property were also identified as important. More than one in three said having a private garden (36%) was important, while having sufficient space and living area (29%) and off-street parking (25%) were also important in making somewhere a good home.

Likely reflecting the older age demographic, the cost of running a home appears to be a more important consideration than the cost of buying or renting a home. Having an energy efficient home (with good insulation and energy efficient boiler for example) was important for nearly a quarter (23%) while around one in seven (15%) identified the affordability of the home (the cost of buying or renting) to be important. Only a very small proportion of UK adults aged 50 or more considered wheelchair accessibility (1%) to be important.

Figure 1.16: Preferences for a good home

Q14. Which two or three of the following, if any, are most important to you personally in thinking about what makes a good home?



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

There were however some marked differences in preferences by sub-groups of this population. Those in the older age groups were more likely to have a preference for proximity to local amenities and prioritise running costs over the affordability of buying or renting when compared to those in the youngest age group. Nearly two in five (39%) of those aged 75+ identified proximity to essential services as important

compared to 25% of 50–64-year olds, suggesting that having access to amenities is a particularly important consideration for those aged 75 and over. Nearly three in ten (28%) of those aged 75+ said it was important to have an energy efficient home compared to 20% of 50–64-year olds. In contrast, housing affordability was more important to those in the youngest age group with one in five (19%) of those aged 50-64 saying the cost of buying or renting a home was important compared to 7% of those aged 75+.

Housing affordability was also a much more important consideration for renters. Around two in five of all renters, including 42% of all private renters and 38% of all social renters said housing affordability was important, compared to 11% of owner-occupiers. Housing affordability was also a more important consideration for those in the lowest income group (18% among those earning less than £26,000) and those from an ethnic minority background (23% vs. 14% of white people). The provision of affordable housing for older people who are renting and on lower incomes is clearly a key consideration suggesting the importance of low-cost rental housing options for these older cohorts.

When comparing those with and without a health condition, those without a health condition are more likely to consider the quality of the neighbourhood and surrounding area (40% vs. 35% of those with) and a private garden (39% vs. 31% of those with) as important. Those with a health condition are more likely to identify property that is free from hygiene issues (24% vs. 17% of those without), property that is physically secure (21% vs. 17% of those without) and wheelchair accessible (3% vs. 1% of those without) as important.

Housing options to improve the housing situation of people in later life

Survey participants were given some suggestions for improving the housing situation for people in later life and asked to think about what was most important to them based on their current needs.

Participants were able to select the three most important options.

Four in ten (40%) UK adults aged 50 or more identified *adapting existing homes to be more accessible/age friendly* as important, while one in three (34%) said providing *financial assistance to help people adapt their existing homes* was important. Three in ten said *improving the maintenance and upkeep of existing housing* (31%) and *encouraging the development of age friendly conventional housing* (31%), was important.

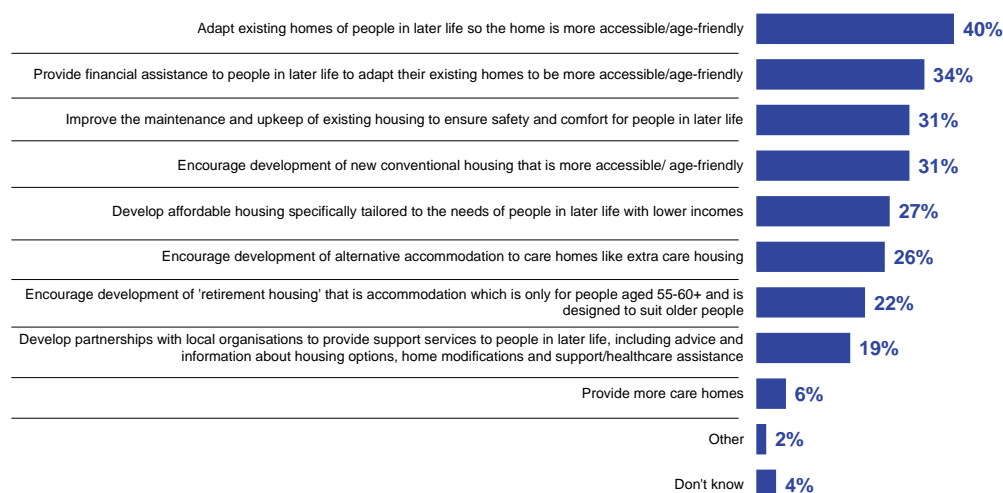
Furthermore, around a quarter said *developing affordable housing tailored to the needs of older people with lower incomes* (27%) and encouraging the *development of alternative accommodation to care homes*, such as extra care housing (26%) was important. Groups more likely to identify alternative accommodation to care homes as important included females (28%) and those in the least deprived IMD Quintile (30%).

Less popular but nevertheless chosen by around one in five was encouraging *development of retirement housing* (22%). Groups more likely than average to identify retirement housing as important were renters (30%), those in the most deprived IMD Quintile (25%), single person households (25%) and those concerned about their physical health.

Provision of more care homes was the least favoured option with fewer than one in ten (6%) stating this was important to them personally based on their current needs.

Figure 1.17: Options for improving the housing situation of people in later life

Q15. Below are some suggestions for improving the housing situation for people in later life (i.e. people aged 55 years and over). Please select what you think are the most important to you personally based on your current needs.



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

These results suggest that improving housing options primarily involves supporting individuals to stay in their homes through adaptations and maintenance. This includes embedding accessible housing features within mainstream housing. However, there is also interest in the development of more conventional homes that are better designed for age related needs, as well as a sizeable minority that support the development of specialist types of housing. Overall, the data highlights that older people are seeking a mix of options, making existing homes more age friendly, the development of age friendly conventional homes, and also some specialist housing. Within this there were some marked differences by tenure, income and ethnic background. Notably, owner-occupiers were more likely than renters to favour adapting existing homes to make them more accessible (42% vs. 26% of private tenants and 32% of social tenants) as well as favour financial assistance to help adapt existing homes (35% vs. 28% private tenants and 24% social tenants). The data suggests that older home owners are particularly interested in options that enable them to adapt their existing home which will assist them to 'age in place'.

Those from an ethnic minority background were more likely than those from a white background to favour improving the maintenance and upkeep of existing housing (41% vs. 30% white people) as were social tenants relative to the population overall (39% vs. 31% overall).

Renters, and particularly private renters as well as those from an ethnic minority background and those in the lowest income groups, were more likely than average to have favoured developing affordable housing specifically tailored to the needs of people in later life with lower incomes. Over half of all renters (53% of private renters and 51% of social renters), 38% of those from an ethnic minority background and a third of those earning less than £26,000 (34%) favoured developing affordable housing for those on lower incomes compared to 27% overall. As noted earlier, it is evident from the data that provision of affordable housing designed to be suitable for older people should be an important part of the mix of housing options required to meet the different needs of older people.

Those on the highest incomes (£100,000+) were more likely than average to favour encouragement of the development of alternative accommodation like extra care housing (35% vs. 27% overall) while

social renters were more likely to favour developing 'retirement housing' designed to suit older people's needs (30% vs. 23% overall).

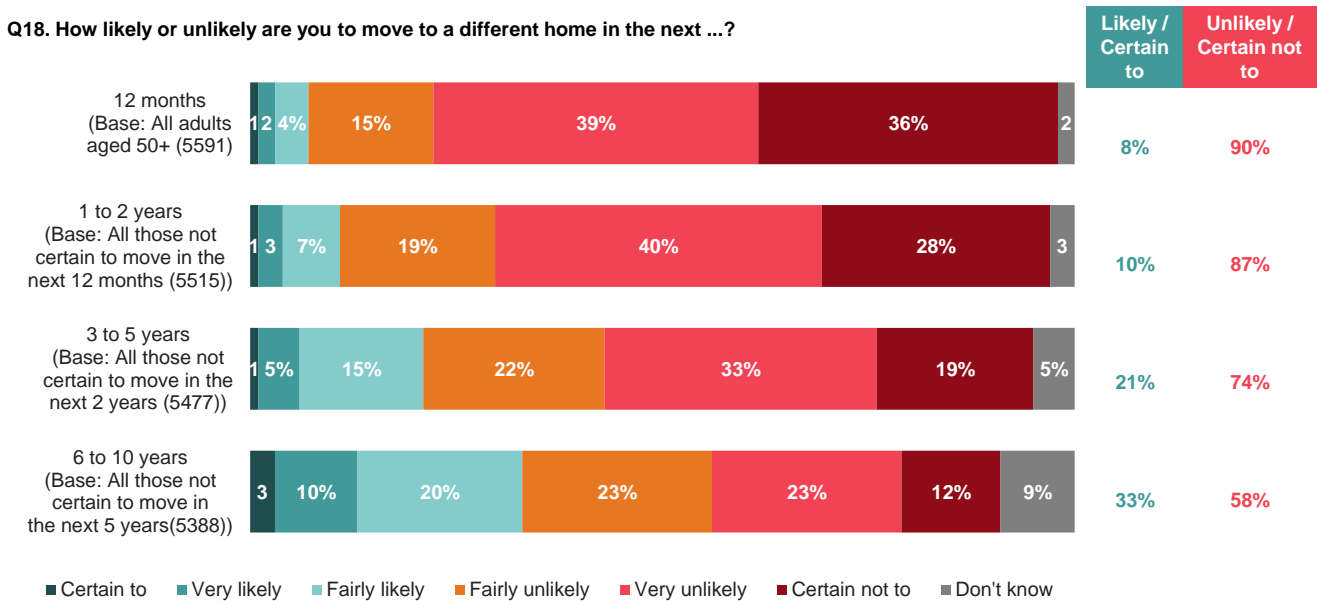
Propensity to move and housing preferences

The previous section has highlighted the favourability of housing options focused on adapting the existing housing stock to improve the housing situation of people in later life as well as other types of housing options that people are seeking. In this section we consider in greater detail the moving intentions of UK adults aged 50 or more and their expectations for housing in the future.

Moving intentions

UK adults aged 50 or more were asked to indicate how likely or unlikely they were to move over various periods of time. Overall, 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 3-5 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. This highlights the importance of balancing supporting people to remain living where they are while offering a mix of housing choices as alternative accommodation when they seek to move.

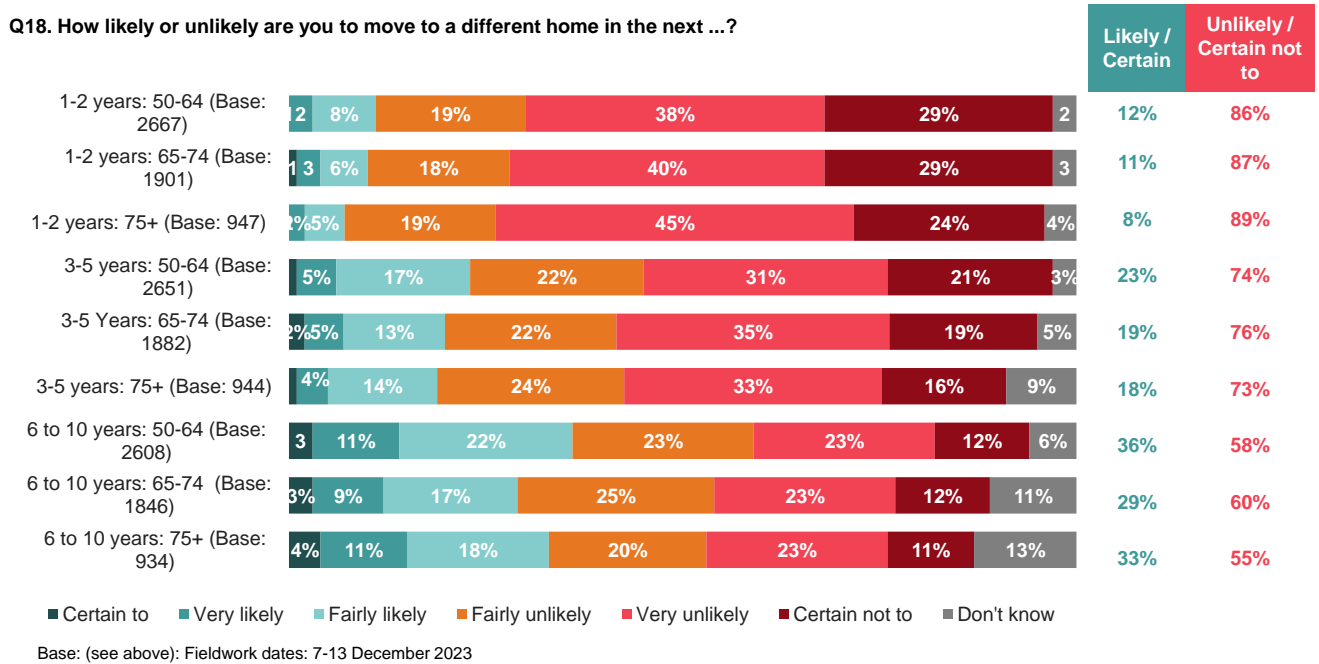
Figure 1.18: Likelihood of moving



Base: (see above): Fieldwork dates: 7-13 December 2023

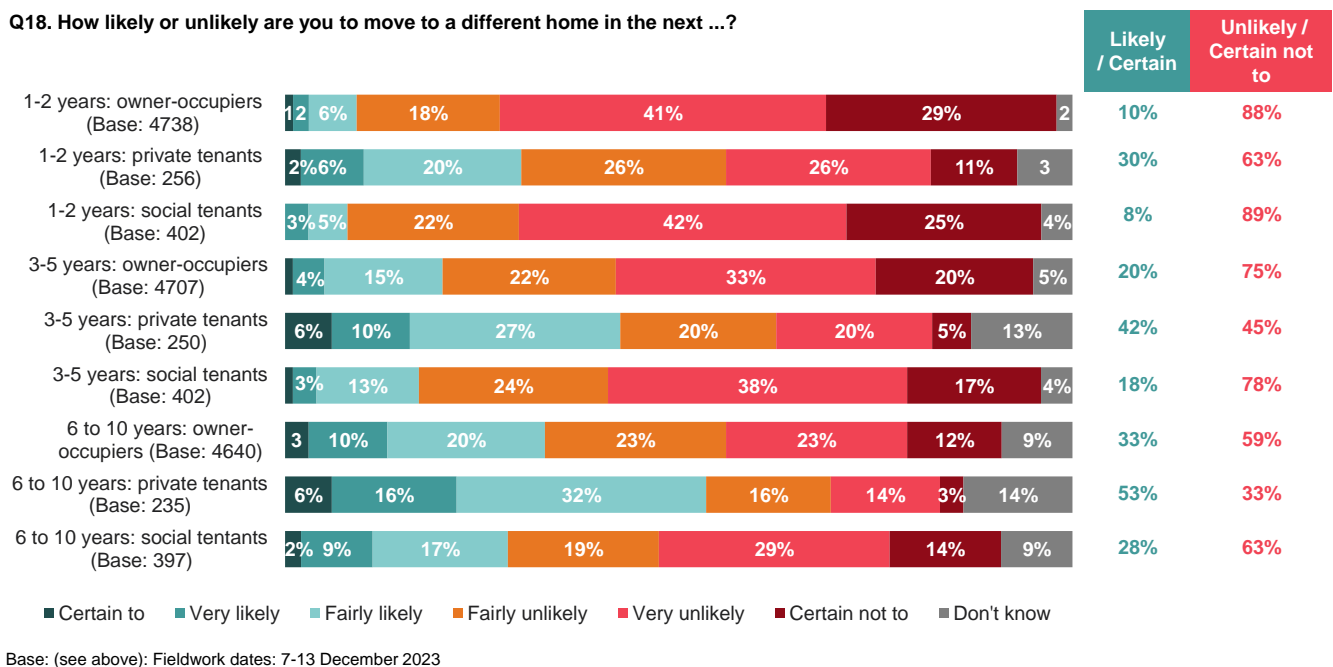
There were several sub-groups that were significantly more likely to move across all the time periods, including those in the youngest age category. Around one in ten (11%) of those aged 50-64 said they were certain or likely to move within the next 1-2 years, rising to 35% certain or likely to move within the next 6 to 10 years.

Figure 1.19: Likelihood of moving by age



Furthermore, nearly a quarter (24%) of all private renters said they were certain or likely to move within the year rising to more than half (53%) certain or likely to move within the next 6 to 10 years. In contrast, those in older age bands and social tenants were less likely to move.

Figure 1.20: Likelihood of moving by tenure



Other factors that impacted on propensity to move included satisfaction with current home and whether their current home will be suitable if their needs change in the future.

When asked how likely they would be to move in the next 3-5 years, 27% of those dissatisfied with their current home said they would be certain or likely to move, compared to 18% of those who were satisfied with their current home. Furthermore, three in ten (30%) of those who agreed their home will not be

suitable if their needs changed said they were certain or likely to move in the next 3-5 years, compared to just 11% of those who disagreed.

Housing preferences

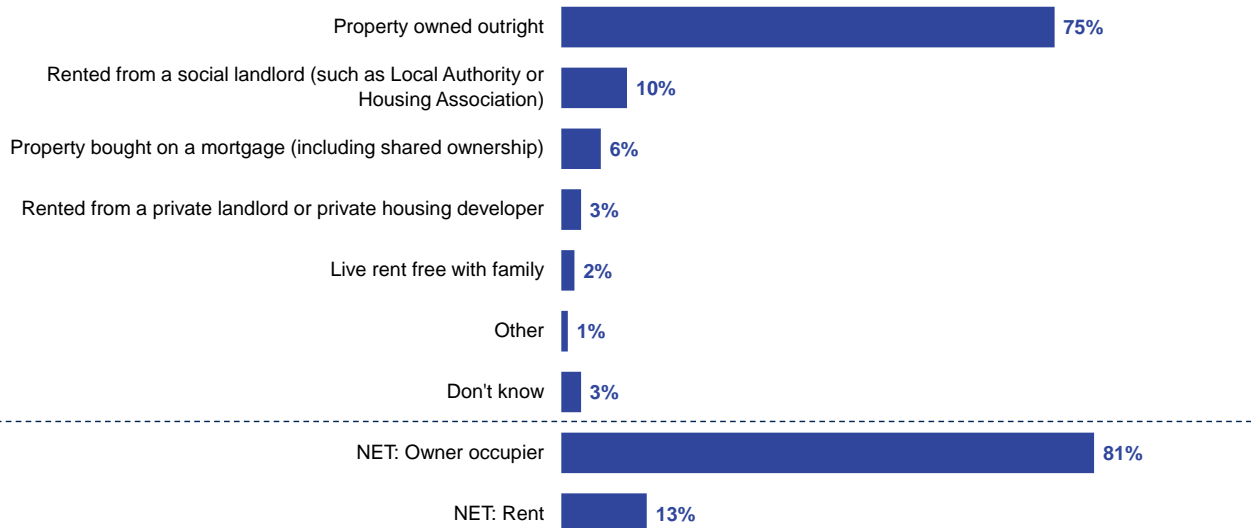
Survey participants were asked, regardless of whether they were likely to move or not, the types of property they would expect if they did move to a different home. Below we summarise key preferences in relation to tenure, type and size of property.

Tenure preferences

Current tenure was a strong influence on future tenure expectations. When thinking about what type of housing tenure they would expect to move into in the future, eight in ten (81%) expect to be owner-occupiers, with three quarters (75%) saying they would expect to own the property outright. One in ten (10%) said they expect to rent from a social landlord in the future, while 3% said they would expect to rent privately. The data suggests therefore, that most older people, if they were to move in the future, did not expect to shift tenure.

Figure 1.21: Expected housing tenure in the future

Q21. Regardless of whether you are likely to move or not, if you did move to a different home in the future, which one of these would you expect it to be?



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

Comparing current tenures with future expected tenures highlights that only 3% of current homeowners would expect to move to rented accommodation in the future. In contrast, a quarter (25%) of current private renters and 8% of social tenants expect to be homeowners in the future.

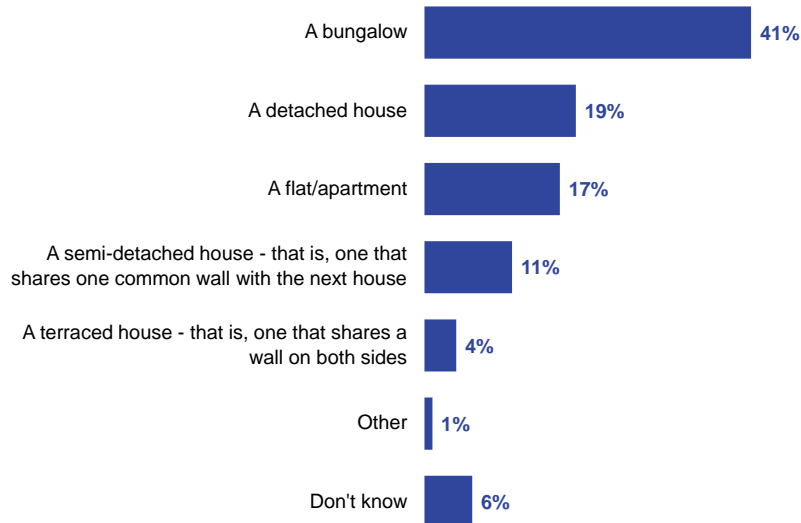
Income is also an important influence on future tenure expectations with those on higher incomes more likely to say they would expect to own a house in the future while those in the lowest income group (under £26,000) were more likely to expect to rent in the future (26% vs. 13% overall). Those with a health condition were also more likely to say they expect to rent in the future (22% vs 9% of those without).

Type of Housing

Four in ten (41%) UK adults aged 50 or more said they would expect to move to a bungalow in the future and one in three (34%) said they would expect to move to a house (including 19% who expected to move to a detached house). Around one in six (17%) said they would expect to move to a flat or apartment.

Figure 1.22: Type of housing

Q20. Regardless of whether you are likely to move or not, if you did move to a different home in the future, which one of these would you expect it to be?



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

Those in older age groups were more likely to expect to move to a bungalow, including just under half of those aged 65-74 (47%) and 75+ (49%) compared to 34% of all those aged 50-64. Owner-occupiers (42%), those in the lowest income group (47%) and those with a health condition (47%) were also more likely than their sub-group counterparts to expect to move to a bungalow in the future.

In contrast, expectations to move to a detached house were highest among those aged 50-64 (24%), those with incomes of £100,000+ (36%) and those without a health condition (22%). Groups most likely to expect to move to a flat or apartment included those currently living on their own (32%), those currently renting (including 30% of all private renters), those aged 75+ (27%) and those with a health condition (21%).

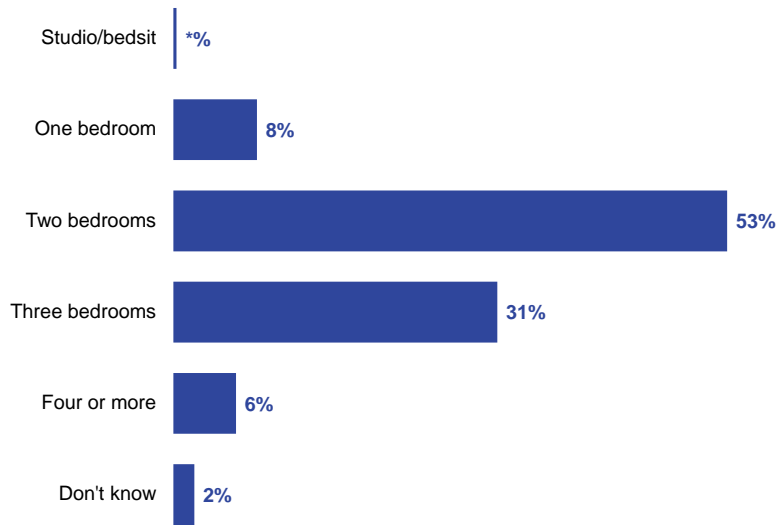
This data suggests that although older people are seeking a mix of housing types, bungalows are most popular across all age cohorts. In contrast, flat and apartment developments have a more limited appeal, however, those aged 75+ and those with a health condition are more likely to consider moving to this type of housing.

Property size

Over half (53%) of all UK adults aged 50 or more would expect to live in a property with two bedrooms, while three in ten (31%) would expect to live in a three bedroom property. Considerably fewer would expect to live in smaller one bedroom or studio/bedsit accommodation (8%) or in larger property with four or more bedrooms (6%).

Figure 1.23: Number of bedrooms

Q19. Regardless of whether you are likely to move or not, if you did move to a different home in the future, how many bedrooms would you expect it to have?



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

There were some variations across demographic groups in terms of property size expectations. Those in the youngest age group (50-64) were more likely than average to expect to live in larger property (45% expecting property with three or more bedrooms) while those aged 75+ were more likely to expect to live in smaller, one bedroom (12%) or two bedroom (63%), property.

Social renters and to a lesser extent private renters were more likely than average to expect to live in smaller property with 29% and 19% respectively expecting one bedroom property in the future. Similarly, those in the lowest income group (19%) and those with a health condition (13%) were more likely than average to expect to live in one bedroom property.

In contrast, groups more likely than average to expect to live in larger property with three or more bedrooms include those in the highest income group (63%) and those from an ethnic minority background (53% vs. 37% overall).

There is increasing focus on unlocking spare capacity within the UK housing market with particular attention on those currently 'under-occupying' helping to address the mismatch between demand and supply. With an increasing ageing population and more older people living in family-sized homes, often with spare or underused rooms, attention is likely to focus on policies to encourage downsizing or right-sizing where scope exists. Understanding older persons' preferences in relation to their preferred size of property is, therefore, an important consideration in the wider context of an effective and functioning housing market.

We have seen in earlier analysis that the majority of UK adults aged 50 or more are currently living in two or three bedroom property (64%), while nearly a third are currently living in property with four or more bedrooms (31%). In contrast 61% would expect to live in one or two bedroom property if they moved and 6% would expect to move to property with four or more bedrooms.

Comparing the current property size profile with future expectations suggests there is scope for downsizing amongst the older population. Nearly three in five (58%) UK adults over 50 would expect to live in a smaller property than they are currently living in now while slightly more than one in three (36%) would expect to live in property of the same size and 5% would expect to live in a larger property than they live in now.

Figure 1.24: Current and expected size compared

Current size	Expected size				TOTAL
	Studio/ 1 bed	2 beds	3 beds	4+ beds	
Studio/ 1 bed	3%	2%	*%	0%	5%
2 beds	3%	15%	2%	*%	21%
3 beds	2%	26%	14%	1%	44%
4+ beds	*%	11%	15%	5%	31%
TOTAL	9%	54%	31%	6%	100%

36% Expected size same as current

58% Expected size smaller than current

5% Expected size larger than current

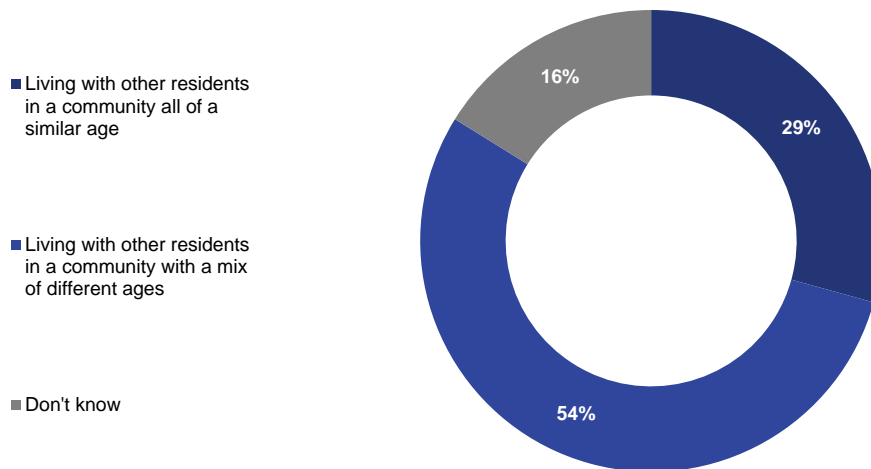
Base: All UK adults aged 50+ (5500) Excludes those stating Don't know at Q6 or Q19: Fieldwork dates: 7-13 December 2023

Community preference in the future

As well as the type, size and tenure of housing expected, older people were also asked about their preferences for living in a community all of a similar age or a mix age of ages - if they were to move in the future. Over half of all UK adults aged 50 or more (54%) said they would prefer to live in a community with a mix of ages, while 29% said they would prefer to live in a community all a similar age and 16% said they didn't know.

Figure 1.25: Community preference

Q22. Regardless of whether you are likely to move or not, if you did move to a different home in the future, which one of these would you prefer?



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

The preference to live with people of a similar age was stronger among social renting tenants (41% vs. 29% overall), those with incomes less than £26,000 (34%), single person households (33%) and those with a current health condition (32%). Conversely, those more likely to want to live in a community with people of different ages included family households (58% vs. 54% overall), those without a current health condition (58%) and owner-occupiers (56%).

The data suggests there is only a modest preference for living in age exclusive housing with the majority of older people preferring to live amongst people of all ages. The data suggests therefore, some scope exists to consider 'inter-generational' housing options and potential for siting of specialist housing within 'general needs' housing developments.

Future housing options

This section considers the stated preferences of UK adults aged 50 or more in relation to a range of possible future housing options. The previous section has highlighted that moving intentions of older people are generally low while the expectation if they did move is to move to smaller accommodation. This section goes on to consider the drivers for moving as well as some of the main barriers.

Preferences for future housing options

Survey participants were given a list of possible future housing options and asked to identify which they preferred the most. Definitions and explanations of the different housing options were provided informed by previous qualitative research by Housing LIN with people aged 50 or more. Overall, nearly half (47%) of all UK adults aged 50 or more said they would prefer to remain in their current home. The most popular option was to stay in their current home but with adaptations, with three in ten (31%) saying they would prefer this if they had a free choice, while 16% would prefer to stay in their current home without any adaptations.

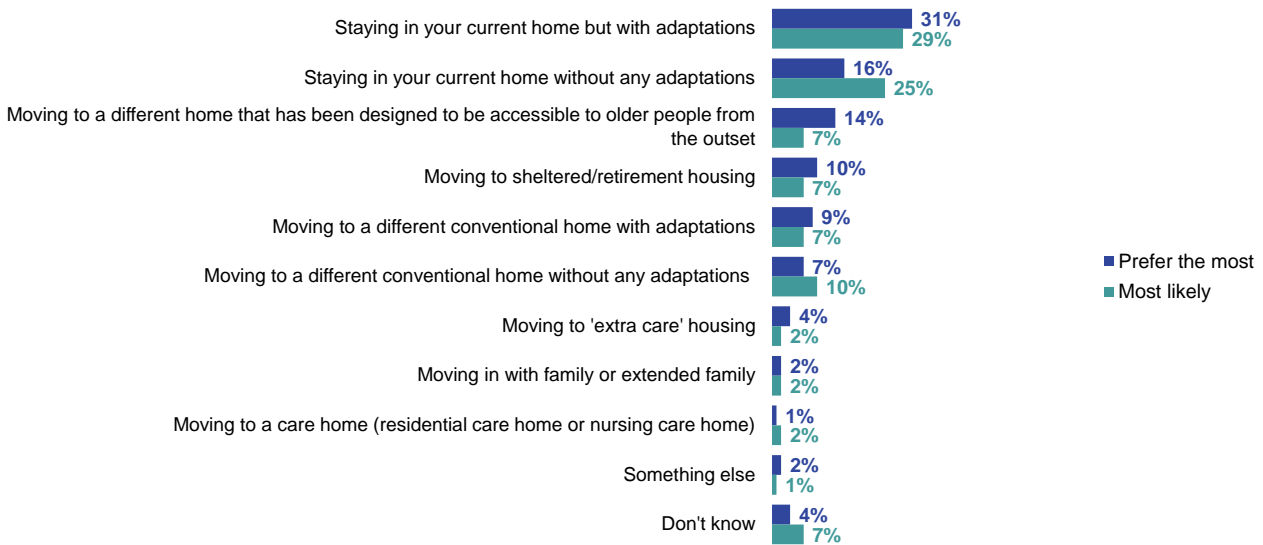
The same proportion (47%) indicated a preference to move to a different home, and of the options presented the most commonly preferred included moving to a different conventional home either with or without adaptations (16%) and moving to a different conventional home that has been designed to be accessible to older people from the outset (14%). Fewer people preferred moving to sheltered/retirement housing (10%), while fewer than one in twenty stated a preference to move to other forms of specialist provision such as extra care housing (4%).

The data also shows that although older people are broadly evenly split on their preference to stay or move from their current home, a slight majority (54%) think they will be most likely to stay in their current home.

For those that would prefer to move, 30% would like to move to a conventional home, while 15% would prefer specialist housing, indicating a weaker preference to move to specialist housing options. However, when looking at what older people think is likely, just under a quarter predict they will move to live in conventional housing while 9% say specialist housing is more likely. This indicates that the preference for specialist housing is stronger than those who think such a move is likely. Overall, the data suggests that while most people would like to stay in their current homes or move to conventional housing, there is nonetheless, some demand for specialist housing.

Figure 1.26: Preferences for future housing options

Q23A. In planning for your future housing needs, if you had a free choice, which one of the following options would you prefer the most? / Q23B. And which, do you think is most likely?



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

Those in the oldest age group (75+) were more likely than average to prefer staying in their current home with adaptations (36% vs. 31% overall) or move to sheltered/retirement housing (14% vs. 10% overall). In contrast those aged between 50-64 were more likely than average to favour a move to different conventional housing without adaptations (10% vs. 7% overall).

There were also some marked differences by tenure with owner-occupiers more likely than renters to prefer staying in their current home with adaptations (33% vs. 11% of private tenants and 25% of social tenants). In contrast, renters were more likely to want to move to a different home that has been designed to be accessible from the outset (19% vs. 14% overall), or to move to sheltered/retirement housing (14% of private tenants and 13% of social tenants vs. 10% overall). Overall, the data suggests that renters appear more open to moving into retirement or sheltered housing.

Those from an ethnic minority background were much more likely than average to prefer moving in with family or extended family (7%) therefore suggesting a need for family-sized intergenerational housing options for that cohort.

Finally, those with a current health condition were more likely than average to favour moving to a different home designed to be accessible from the outset (18%) or to move to sheltered/retirement housing (12%).

Survey participants were also asked what they thought would be the *most likely* situation in the future. As noted above, three in ten (31%) said they would prefer to stay in their current property but with adaptations, and a similar amount said this would also be most likely in the future.

However, a significantly higher proportion of UK adults aged 50 or more considered staying in their current home without any adaptations was most likely. A quarter (25%) said this would be most likely despite 16% saying this was their most preferred option. Similarly, moving to a different conventional home without adaptations was considered most likely by 10%, despite 7% stating this as their most preferred option.

Social renters in particular were more likely to state that staying in their current property without any adaptations was most likely (35% vs. 25% overall), while private renters were more likely than average to indicate that either moving to different conventional housing without adaptations (20% vs. 10% overall) or moving to sheltered/ retirement housing (12% vs. 7% overall) was most likely.

Reasons for moving in the future

Survey participants were asked to identify up to three reasons that would encourage them to move in the future. Four in ten UK adults aged 50 or more (40%) said moving to a smaller home would be a main reason for moving to a different home in the future – the most commonly mentioned reason to move. Other popular reasons identified include having better access to local amenities including public transport, shops and health services and moving to cheaper accommodation. One in five (20%) identified these as reasons to move. This data indicates that a key motivator for moving is to have a smaller home and to be better located to local amenities. This might suggest that older people are seeking to future proof their next property and maximise their chances of 'ageing in place'.

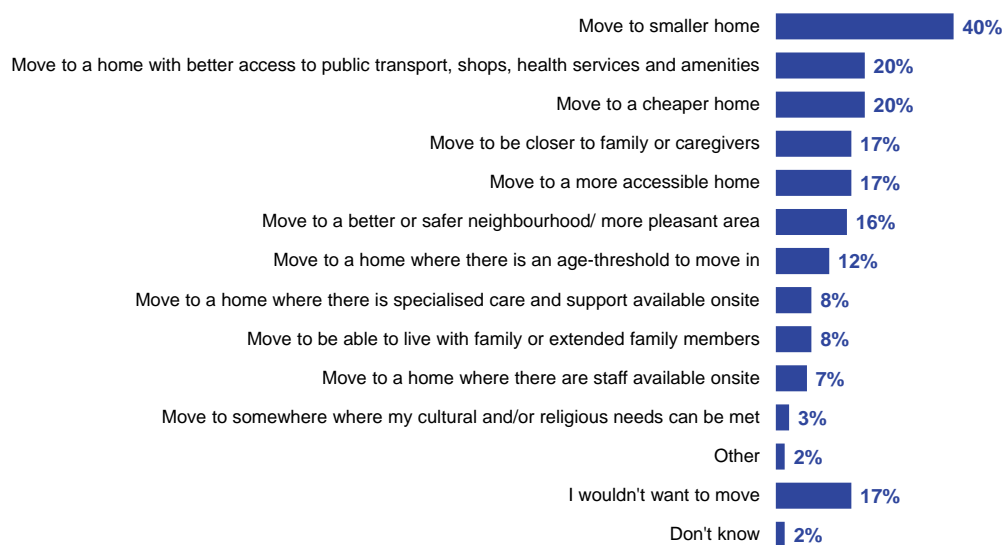
Moving to be closer to family or caregivers (17%), to live in more accessible housing (17%) and to move to a better or safer neighbourhood (16%), were other prominent reasons for moving identified by participants.

Provision of specialist care and support or onsite staff appears to be less of a driver encouraging moves, with fewer than one in ten (8% and 7% respectively) saying this would encourage them to move.

Although the preference to move to specialist housing is relatively modest, as highlighted in the analysis above, this data suggests that when thinking about specialist housing provision, it will be important to focus on the primary move motivators such as property size, preferably smaller, location in terms of proximity to local amenities and moving to cheaper homes.

Figure 1.27: Reasons for moving in the future

Q24. If you were to move to a different home in the future, which two or three of these, if any, are most likely to encourage you to move?



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

Owner-occupiers are more likely than renters to move to a smaller home (43% vs 23% of all renters), while private renters were more likely than average to move to a cheaper home (40% vs. 20% overall).

Those living in rural areas were more likely than those living in urban areas to move home to have better access to transport, shops, health services and amenities (31% vs. 16% in urban areas).

Furthermore, those in the oldest age group (75+) were more likely than average to move to a home with specialist care and support available onsite (16% vs. 8% overall). The provision of care and support is therefore a stronger motivator for older cohorts, but it is still a relatively small minority that are motivated by this factor.

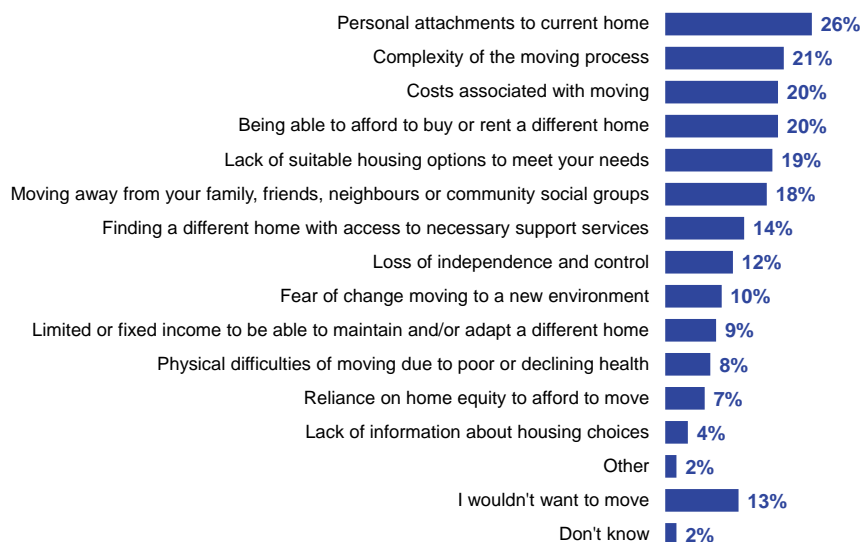
Barriers to moving home in the future

A variety of emotional and practical factors were identified by survey participants as the main barriers to moving to a different home in the future. The data suggests that barriers are complex and possibly interconnected, with various reasons preventing people from relocating, and that these factors may not exist in isolation from one another.

A quarter (26%) said personal attachments to their current home would prevent them from moving while around one in five said the complexity of moving (21%), the costs associated with moving (20%), being able to afford to buy or rent a different home (20%), and a lack of suitable housing options to meet their needs (19%) were barriers to moving. In contrast, very few UK adults aged 50 or more identified information about housing choices (4%) and reliance on equity to be able to move as barriers to moving.

Figure 1.28: Main barriers to moving home in the future

Q25. If you were to move to a different home in the future, what would you say are the main barriers, if any, to moving?



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

Those aged 75+ are more likely than average to identify personal attachments as a barrier to moving (30% vs. 26% overall), while those aged 50-64 are more likely to consider being able to afford to buy or rent a different home (26% vs. 20% overall) and the costs associated with moving (23% vs. 20%) as barriers. This finding illustrates that affordability and costs of moving are more of a barrier to moving for the younger cohorts.

Social renters were also significantly more likely to say the costs associated with moving would be a barrier (30% vs. 20% overall), while over half (54%) of private renters said that being able to afford to buy or rent a different home would be a barrier to moving (compared to 29% of social tenants and 17% of owner-occupiers). The data suggests that the issue of affordability is therefore less of a barrier to moving for owner-occupiers than for renters.

Those in the lowest income group with less than £26,000 were also more likely than average to say being able to buy or rent was a barrier to moving (24%) while those with the highest income were significantly more likely to identify personal attachments as a barrier (38% vs. 26% overall). Furthermore, those with a health condition were more likely than those without to say a lack of suitable housing options to meet their needs would be a barrier to moving (23% vs. 18% of those without).

Financial and health impacts on future housing choices

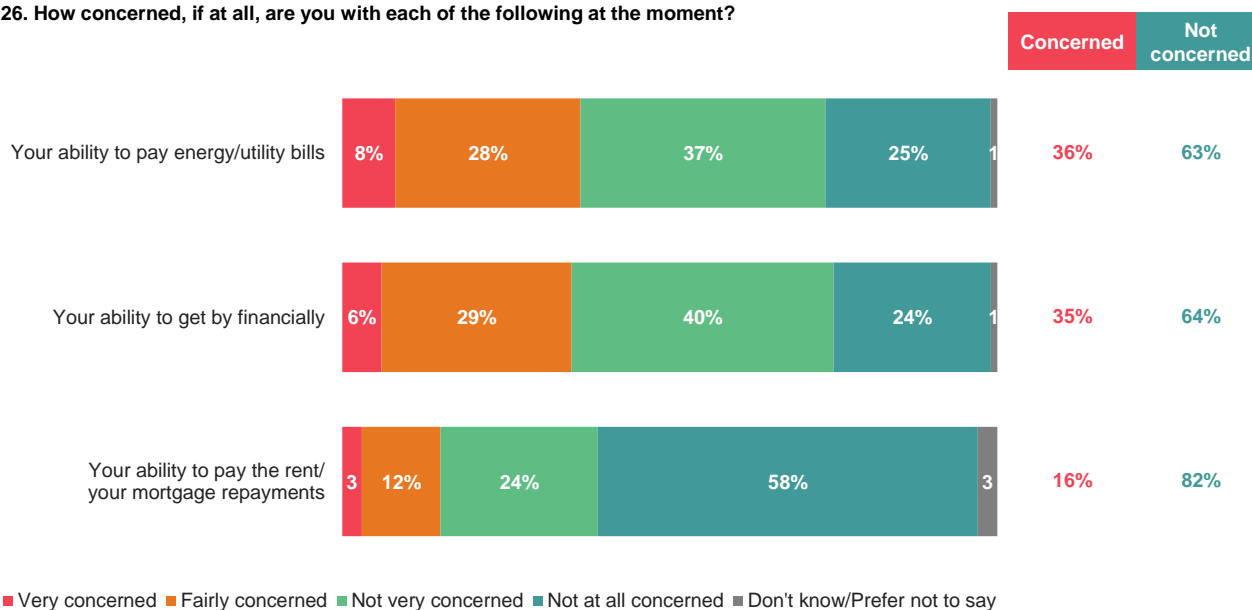
It is evident that the financial position and health of older people will likely have an important bearing on the housing preferences and choices that older people will be able to make in the future. Against a backdrop of recovery from the global Covid-19 pandemic, and more recent concerns over the cost of living and inflation, we draw on survey evidence to consider how perceptions of current finances and health may affect future housing decisions.

Current financial concerns

Although a majority of all UK adults aged 50 or more were not concerned about their ability to pay energy and utility bills (63%) or to get by financially (64%), a sizeable minority were. Over a third (36%) were concerned about their ability to pay energy and utility bills, while 35% were concerned about their ability to get by financially. There was less concern in terms of ability to pay rent or mortgage repayments, as eight in ten (82%) said they were not concerned – 16% said they were.

Figure 1.29: Current financial concern

Q26. How concerned, if at all, are you with each of the following at the moment?



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

There were notable differences in concern across demographic sub-groups. Those living in rented accommodation were significantly more likely than owners to be concerned with paying their energy bills (63%) and getting by financially (66%). Private and social tenants were also significantly more likely to be concerned about paying their rent (51% and 46%) compared to just 10% of owner-occupiers who were concerned about mortgage repayments. This data therefore indicates that older people living in rented housing are concerned about paying their energy bills, getting by financially and paying their rent. For those reasons, alternative housing options for this cohort will need to have a strong focus on addressing affordability concerns.

Those in the youngest age group (50-64) and those with the lowest incomes (less than £26,000) were also more likely than average to be concerned with paying energy bills (41% and 51% respectively vs. 36% overall), getting by financially (42% and 51% respectively vs. 35% overall) and paying their rent or mortgage (22% and 24% respectively vs. 16% overall).

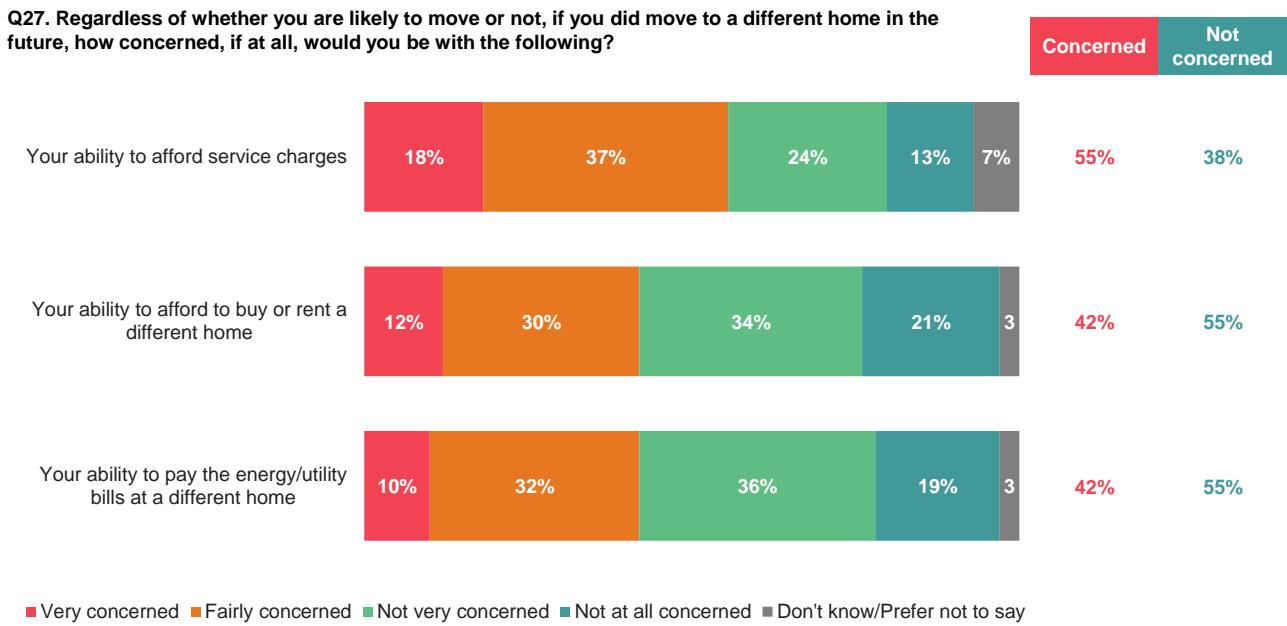
There were also greater financial concerns among those with a health condition. More than two in five (45%) said they were concerned about their ability to pay their energy bills or get by financially (compared to 32% and 30% of those without a condition), while 20% were concerned about their ability to pay rent or mortgage costs (compared to 13% without a condition).

This data suggests that those experiencing health concerns and higher levels of financial stress are closely associated. Limited mobility or the need for specialist care may further exacerbate financial burdens, as they might need to invest more in accessible housing or care services. This financial stress could, therefore, impact on housing preferences and decisions making it more challenging for them to move or afford specialist housing options.

Concern about the cost of moving to a different home

Survey participants were also asked to think about their financial concerns relating to moving to a different property in the future. Over half (55%) of all UK adults aged 50 or more said they would be concerned about their ability to afford the service charges in specialist housing for older people if they moved. Slightly more than four in ten (42%) said they would be concerned about their ability to buy or rent a different home and their ability to pay the energy/utility bills. This highlights some of the potential financial barriers to moving, particularly if moving to specialist housing where service charges apply,

Figure 1.30: Concern about the cost of moving to a different home



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

Overall, a majority of older people are concerned about being able to afford services charges in specialist housing, including over half (52%) of owner-occupiers. However, it is private and social tenants who were significantly more likely to be concerned about being able to afford service charges in specialist housing for older people (67% and 75% vs. 52% of owner-occupiers). Seven in ten (70%) of those with less than £26,000 per annum in household income were also concerned (compared to 55% overall).

For those in higher income brackets, there was less worry about this issue. Just over a half (52%) of those with between £26,000-£51,999 and a similar amount (48%) of those with £52,000-£99,999 shared this concern. While a significant number of people with £100,000 or more were still concerned (34%), they were less likely to be worried about service charge affordability.

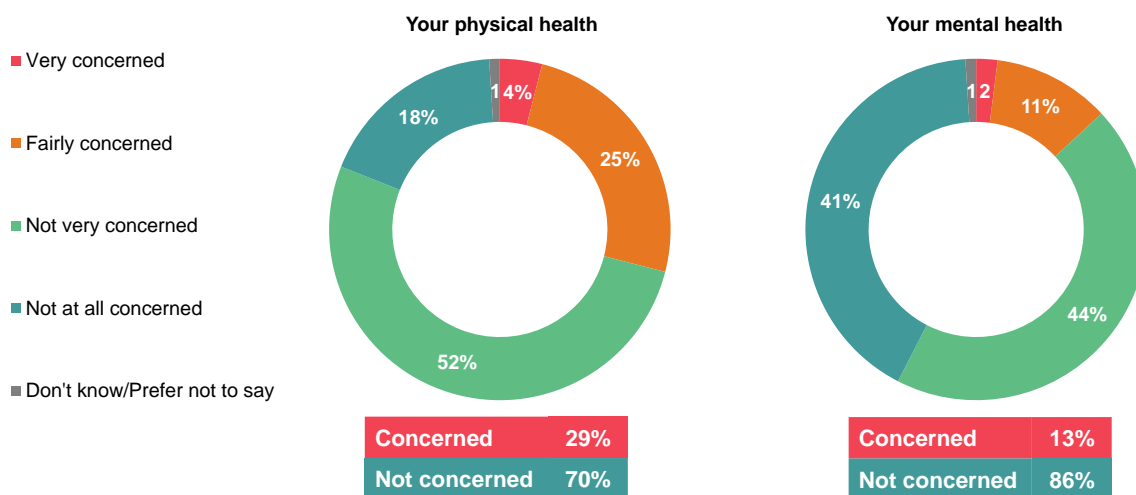
Those with a health condition were also more likely to be concerned than those without (64% vs. 50%). Concern is also higher among these groups about the ability to afford to buy or rent a different home and to pay the energy bills. As previously mentioned, the increased financial stress for those with a health condition could therefore impact on housing preferences and ability to move.

Health concerns

All survey participants were asked how concerned they were about their physical and mental health. Around three in ten (29%) of all UK adults aged 50 or more said they were concerned about their physical health, while fewer, 13% said they were concerned about their mental health.

Figure 1.31: Concern about physical and mental health

Q30. How concerned, if at all, are you with the following at the moment?



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

Those more likely to be concerned about their *physical health* include those aged 75+ (32% vs. 29% overall), those living in social (53%) or private rented (41%) accommodation, those from an ethnic minority background (37%) and those earning less than £26,000 (40%). Those more likely to be concerned about their *mental health* include social (35% vs. 13% overall) and private renting (28%) tenants, those living on their own (19%) and those earning less than £26,000 (21%).

It is not surprising that concerns about physical health are higher among those aged 75 and older. However, these concerns are not substantially greater than those in the overall 50+ age group. It does, however, highlight the importance of specialist housing to help support people with health issues and limitations and, more widely, the importance of ensuring conventional homes – where most people live and wish to continue living – are adapted or designed to best suit age-related needs, helping to meet the preference of the majority of older adults to ‘age in place’.

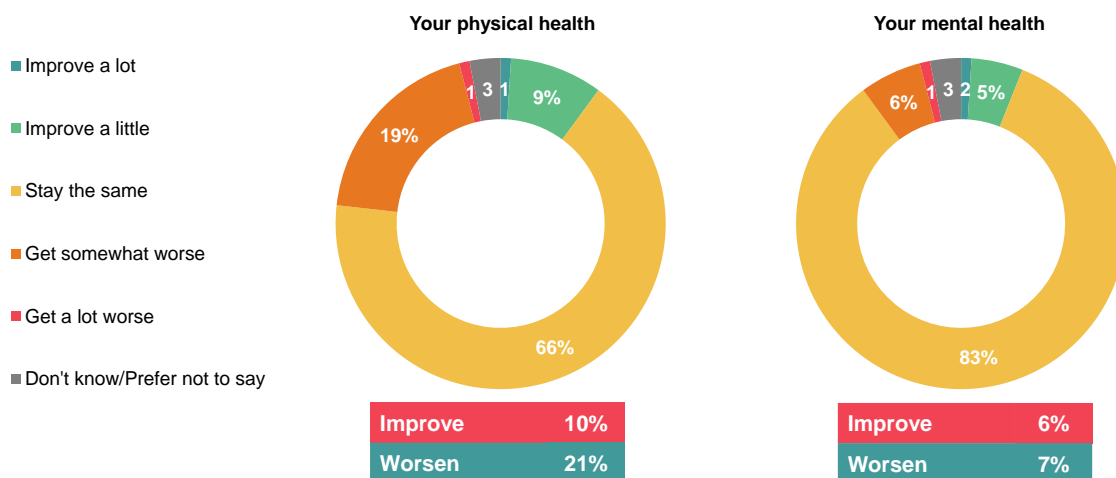
Health concerns over the next 12 months

The majority of UK adults aged 50 or more expect their physical (66%) and mental (83%) health to remain the same over the next year. Around one in five (21%) expect their physical health to get worse over the next 12 months while fewer than one in ten (7%) expect their mental health to deteriorate.

Those groups more likely to think that their physical health will worsen over the next 12 months include those aged 75+ (31% vs. 21% overall), social renters (36%), those earning less than £26,000 (28%) and those living on their own (26%).

Figure 1.32: Health over the next 12 months

Q31. And over the next 12 months, do you think each of the following will improve, stay the same or get worse?



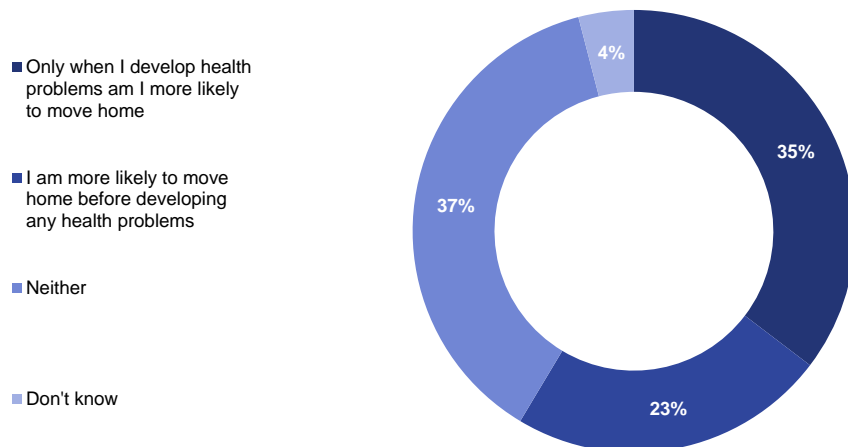
Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

Health and moving

When thinking about their health and the impact on moving home, one third of all UK adults aged 50 or more (35%) said they were likely to move home only when they developed health problems. Just below a quarter (23%) said they were more likely to move home before developing a health condition and 37% said they would do neither.

Figure 1.33: Health and moving

Q32. Which one of the following statements best describes how you think about moving home?



Base: All UK adults aged 50+ (5591); Fieldwork dates: 7-13 December 2023

There are some notable variations in attitudes on this, especially by age. Nearly half (45%) of all those aged 75+ said they would only move when they develop health problems (vs. 29% of those aged 50-64) while those aged 50-64 are more likely than average to say they will move before developing health problems (29% vs 13% of those aged 75+). This suggests, particularly among people aged 75 and older, that they are less likely to move or consider moving until they experience a health problem, whereas those aged 50-64 are potentially more open to moving preventatively, before any health problems develop. However, it is important to note that only a minority (23%) of all age groups consider making such 'preventative' moves based on health concerns.

Final reflections

Current housing situation

Home Ownership: Overall, a significant majority of UK adults aged 50 or more were owner-occupiers (84%), with 66% owning their properties outright and 18% having a mortgage. The survey results indicate that home ownership is closely associated to factors such as age, ethnicity, income, household type, and geographic location. Older respondents (65+ years) were more likely to own their property outright, while younger respondents (50-64 years) were more likely to be paying a mortgage or renting. White participants were more likely to be owner-occupiers, while those from an ethnic minority background were more likely to be renting, either from private or social landlords. Those on lower income were more likely to be renting as were those with a health condition.

Type and size of home: The overwhelming majority of UK adults aged 50 or more lived in conventional homes, with owner-occupiers more likely to live in larger properties with more bedrooms. More than four in ten (44%) lived in properties with three bedrooms, while a further three in ten (31%) had four or more bedrooms. Household income and health condition were also closely associated with the number of bedrooms in the home.

Time in Property: A majority of UK adults aged 50 or more had lived in their current property for a long time; nearly half (46%) had lived there for more than 20 years. Owner-occupiers and those with higher income were more likely to have stayed in their property for longer. In contrast, renters and those with lower income were more likely to have lived in their property for a shorter time.

Household Composition: A majority of respondents lived with their partner, while a significant proportion lived alone or with their children. Older respondents aged 75 or more, renters, and individuals with health conditions were more likely to live alone, while younger respondents and owner-occupiers were more likely to live with a partner or children.

Satisfaction with current home

Satisfaction with current home: A majority (84%) of all UK adults aged 50 or more were satisfied with their current housing. Satisfaction was associated with factors such as age, ethnicity, housing tenure, household income and health conditions. Those aged 65+ years were more likely to be satisfied with their current housing, compared to those aged 50-64 years. Owner-occupiers were significantly more satisfied with their current housing than social or private tenants. Those on a lower household income (less than £26,000), those from an ethnic minority background and those with a health condition were more likely to be dissatisfied with their current housing situation.

A majority (91%) reported feeling safe and secure in their current home and most (89%) said the location of their current home convenient for their needs. There were some concerns about their current home not being suitable for their future needs and worries about heating costs and these concerns were more prevalent among private tenants, those in the lower annual income band, and those with a health condition.

Recent moves: One in six (17%) of all UK adults aged 50 or more had moved to their current home within the last five years. The main reasons for moving were to move to a nicer home or to a better neighbourhood. This was more likely among those aged 50-64, owner-occupiers, those on higher incomes and those without a health condition. Some had down-sized to a smaller property, with this

being more likely among older participants, owner-occupiers and those living alone. Some had moved to be closer to family and friends, with this being more likely among older participants and those concerned about their physical health.

Current adaptations and future intentions

Current adaptations: Over half (57%) of UK adults aged 50 or more reported no adaptations in their current home. The most common adaptations were a downstairs bathroom or shower, features to ease bathroom use, and step-free access. Older respondents, owner-occupiers, social tenants, and those with a health condition were more likely to have these adaptations.

Future adaptations: A significant majority (84%) did not intend to make any adaptations to their homes. For those who felt their current home would not be suitable for future needs, over half (55%) agreed that adaptations would make their home suitable for future needs, while a third (35%) disagreed.

Options to improve the housing situation for people in later life: Four in ten (40%) of UK adults aged over 50 identified adapting existing homes to be more accessible/age friendly. Around a third (34%) said providing assistance to help people adapt their existing homes was important, and three in ten (31%) said improving the maintenance and upkeep of existing housing. A smaller proportion felt specialist housing was a priority; a quarter (26%) expressed a preference for encouraging the development of alternative accommodation to care homes, like extra care housing, and one in five (22%) identified the development of retirement housing as important. These preferences varied based on housing tenure, location, and health condition.

Propensity to move and preferences

Likelihood to move: Over half of all UK adults aged 50 or more indicated that they were unlikely to move in the next 5 to 10 years. However, those aged 50-64 and private tenants were more likely to consider moving. Other factors influencing the likelihood to move included satisfaction with the current home and whether their current home will be suitable if their needs change in the future. Those dissatisfied with their current home or those who agreed that their home would not be suitable if their needs changed were more likely to consider moving.

Property preferences: A majority (81%) of UK adults aged 50 or more expect to be owner-occupiers in the future, reflecting the predominance of owner-occupation in the current tenure profile. In terms of property type, the strongest preference is for a bungalow and this was notably higher among those aged 65 and above, lower-income earners and those with a health condition. Preference for detached housing was more prominent among those aged 50-64, higher-income earners and those without health conditions while preference for flats or apartments was stronger among those aged 75+, renters and those living alone. The potential for down-sizing exists with a majority (58%) of UK adults aged 50 or more expecting to live in smaller property than they are currently living in now while around a third would expect to live in property of the same size. A majority (54%) also expressed a preference to live in communities with a mix of ages. Social tenants and those with lower incomes lean towards communities of similar ages, while owner-occupiers, families, and individuals without health conditions prefer diverse age groups.

Future housing options

Housing options: Nearly half (47%) of all UK adults aged 50 or more said they would prefer to stay in their current home either with adaptations (31%) or without. Around one in six indicated a preference to move to different conventional housing (with or without adaptations) while far fewer state a preference to move to specialist provision like extra care housing, retirement/sheltered housing, or a care home. Renters show a higher inclination towards accessible homes and sheltered/retirement housing.

Drivers of future moves: Overall, older people are motivated more by size (i.e. moving to smaller home), location aspects and affordability, than by a desire to move to specialist or age-restricted housing. The quality of the neighbourhood and surrounding area, along with the presence of a private garden, emerged as the most significant considerations for over a third of participants. Proximity to essential amenities, energy efficiency, and affordability also played substantial roles in shaping moving intentions. Owner-occupiers were more likely to prioritise the quality of the neighbourhood, while age played a role in preferences related to proximity to essential amenities and energy efficiency, with older respondents expressing greater importance in these aspects.

Barriers to moving: The survey highlighted there were multiple barriers to moving. Personal attachments to the current home emerged as a significant barrier, especially among owner-occupiers and older individuals. Affordability issues, particularly among social tenants and lower-income groups, also pose challenges to moving, suggesting the need for solutions addressing financial barriers.

Financial concerns: A sizeable minority (around a third of all UK adults aged 50 or more) were currently concerned about their ability to pay energy bills and get by financially and this is a particular concern for renters, those on the lowest incomes and those with health conditions. This pattern is also reflected in financial concerns if they did move, with these same groups most concerned about their ability to afford service charges in specialist housing for older people, their ability to buy or rent and pay for energy bills in a different home. Financial concerns are an important consideration, especially as a potential barrier to moving to specialist forms of housing provision.

Health concerns: Around a third (35%) of all UK adults aged 50 or more said they would be likely to move home *only* when they developed health problems with those aged 75+ most likely to say this. Those 75+ are also more likely to think that their physical health will worsen over the next year. In the longer-term as the population continues to age, this might suggest greater prominence for specialist forms of housing catering for a growing number of health-related moves.

ANNEXE A – KnowledgePanel

technical note

The following provides technical details about the KnowledgePanel and the Older People's Housing Preference study. This study was conducted on the KnowledgePanel between **7th December – 13th December 2023**. In total 5,591 interviews were achieved with residents across the United Kingdom aged 50+.

Sample

The KnowledgePanel is a random probability survey panel. Therefore, the KnowledgePanel does not use a quota approach when conducting surveys. Instead invited samples are stratified when conducting waves to account for any profile skews within the panel. The sample was stratified by country and education.

A total of 8,851 panellists in United Kingdom (aged 50+) were selected and invited to take part in the survey. Of these, 5,591 respondents completed the survey – a response rate of 63%.

Weighting

In order to ensure the survey results are as representative of the target population as possible, the below weighting specification was applied to the data in line with the target population profile.

Up to three people per household were allowed to complete this survey. To account for this and varying household sizes, we employed a design weight to correct for unequal probabilities of selection of household members.

Calibration weights have also been applied using the latest population statistics relevant to the surveyed population to correct for imbalances in the achieved sample. England and Wales, Scotland, and Northern Ireland were each weighted separately, while an additional weight has been created for the United Kingdom to account for any over or under sampling within each of these countries.

The calibration weights were applied in two stages:

- The first set of variables were (*using ONS 2019 mid-year population estimates as the weighting targets*): An interlocked variable of Gender by Age, and region.
- The second set were (*using ONS 2019 mid-year population estimates and the ONS Annual Population Survey as the weighting targets*): Education, Ethnicity, Index of Multiple Deprivation (quintiles), and number of adults in the household.

The below tables present the weighting profile targets for **England**:

Age & Gender				
	Male	Female	In another way	PNTS
50-64	25.1%	25.9%	0.1%	0.3%
65-74	12.4%	13.4%	0.0%	0.1%
75+	9.8%	12.9%	0.0%	0.1%

Region	
North East	5.1%
North West	13.4%
Yorkshire And The Humber	9.9%
East Midlands	9.0%
West Midlands	10.6%
East Of England	11.6%
London	11.9%
South East	17.1%
South West	11.4%

Ethnicity	
White	89.0%
Non-White	10.0%
Don't know/PNTS	1.0%

IMD Quintiles	
1	20.0%
2	20.0%
3	20.0%
4	20.0%
5	20.0%

Education	
Degree level or above	27.3%
Below degree level	71.7%
Prefer not to say/Not stated	1.0%

Number of adults in the household	
One adult	24.8%
Two or more adults	75.2%

The below tables present the weighting profile targets for **Wales**:

Age & Gender				
	Male	Female	In another way	PNTS
55-64	23.8%	25.0%	0.0%	0.2%
65-74	13.3%	14.1%	0.0%	0.2%
75+	10.2%	13.2%	0.0%	0.0%

IMD Quintiles	
1	20.0%
2	20.0%
3	20.0%
4	20.0%
5	20.0%

Education	
Degree level or above	27.2%
Below degree level	71.7%
Prefer not to say/Not stated	1.1%

Ethnicity	
White	96.9%
Non-White	2.5%
Don't know/PNTS	0.6%

The below tables present the weighting profile targets for **Scotland**:

Age & Gender				
	Male	Female	In another way	PNTS
55-64	24.9%	26.8%	0.0%	0.0%
65-74	12.8%	14.0%	0.0%	0.0%
75+	9.0%	12.5%	0.0%	0.0%

Region	
Central Scotland	38.3%
Glasgow	10.3%
Highlands and Islands	8.5%
Lothian	42.9%
Mid Scotland and Fife	0.0%
North East Scotland	0.0%
South Scotland	0.0%
West Scotland	0.0%

IMD Quintiles	
1	20.0%
2	20.0%
3	20.0%
4	20.0%
5	20.0%

Education	
Degree level or above	22.7%
Below degree level	76.9%
Prefer not to say/Not stated	0.5%

Ethnicity	
White	98.3%
Non-White	1.7%
Don't know/PNTS	0.0%

The below tables present the weighting profile targets for **Northern Ireland**:

Age & Gender				
	Male	Female	In another way	PNTS
50-64	26.1%	27.1%	0.0%	0.0%
65+	21.6%	25.2%	0.0%	0.0%

IMD Quintiles	
1	20.0%
2	20.0%
3	20.0%
4	20.0%
5	20.0%

Education	
Degree level or above	24.5%
Below degree level	74.8%
Prefer not to say/Not stated	0.7%

Statistical reliability

This survey is based on a representative sample of the total UK population aged 50 or more and as such means we cannot be sure that the results obtained would have been the same as if all of the population took part in the survey.

However, it is possible to predict the variation between between sample results and the "true" values from knowledge of the size of the samples on which the results to each question is based, and the number of times a particular answer is given. The confidence with which we can make this prediction is usually chosen to be 95% - that is, the chances are 95 in 100 that the "true" value will fall within a specified range. The following illustrates the predicted ranges for the achieved sample size and percentage results at the "95% confidence interval".

Size of sample on which survey results are based	Approximate sampling tolerances applicable to percentages at or near these levels	Approximate sampling tolerances applicable to percentages at or near these levels	Approximate sampling tolerances applicable to percentages at or near these levels
	10%/90%	50%/50%	30%/70%
5,591 responses	+/- 0.8%	+/- 1.3%	+/- 1.2%

According to the table above, for example, with a sample size of 5,591 respondents, where 70% give a particular answer, the chances are, 19 in 20 that the "true" value (i.e. the one which would have been obtained if the whole population had been surveyed) will fall within the range of ± 1.2 percentage points from the survey result (i.e. between 68.8% and 71.2%).

When results are compared between separate groups within a sample (e.g. by age or tenure group), different results may be obtained. The difference may be "real," or it may occur by chance (because not everyone in the population has been surveyed). To test if the difference is a real one - i.e. if it is "statistically significant" - we again have to know the size of the samples, the percentage giving a certain answer and the degree of confidence chosen. If we once again assume a "95% confidence interval", the differences between the results of two separate groups must be greater than the values given in the following table.

Size of sample on which survey results are based	Differences required for significance at or near these percentage levels	Differences required for significance at or near these percentage levels	Differences required for significance at or near these percentage levels
	10%/90%	50%/50%	30%/70%
2,719 vs 952 responses (50-64 vs 75+ age groups)	+/- 2.2%	+/- 3.7%	+/- 3.4%
4,795 vs 270 responses (Owners vs Private renters)	+/- 3.7%	+/- 6.1%	+/- 5.6%

ANNEXE B – Survey questionnaire

Section 1: Current tenure / housing situation

Q1. Which of the following best describes your current housing situation?

If you have more than one home, please think about the one you consider to be your main home.

Please select one option only.

1. Own a property outright
2. Own a property but still buying on a mortgage
3. Own a share of a property through a Shared Ownership Scheme
4. Rent from a private landlord
5. Rent from a social landlord (such as Local Authority or Housing Association)
6. Living rent-free with someone else
7. Other (Please specify)
8. I don't know

Q2. Which of the following best describes the type of housing you currently live in?

Please select one option only.

1. A conventional home. (**INFO:** Includes property occupied by the majority of the population such as homes purchased in the open market, property rented from a private landlord or general needs housing rented from a local council or housing association)
2. A care home (**INFO:** Includes residential care homes where a number of older people live usually in single rooms, with access to on-site social care services like meals and help with washing and dressing, and nursing care homes which are similar but additionally provide care from qualified nurses. Care homes do not usually consist of self-contained units)
3. Sheltered or retirement housing (**INFO:** Specialist housing usually for people over a specified age, often 55 years or 60 years. Sheltered housing is typically self-contained homes which may have communal areas supported by a visiting scheme manager and access to an alarm service offered for social or affordable rent, based on need, by local councils or housing associations. Retirement housing is similar but usually built by private developers for market sale or rent and managed by the developer or another private company. It is sometimes referred to as 'Independent Living' or 'Retirement Living')
4. Extra care housing (**INFO:** Specialist housing usually for people over a specified age, often 55 years or 60 years. Occupied by a range of older people, some with higher level care or support needs. Residents live in self-contained homes, typically with access to communal facilities and onsite 24/7 care services, usually with a scheme manager and support staff. Often referred to as 'extra care housing' when provided by housing associations and local councils and often referred to as 'assisted living', 'retirement living' or 'retirement village' by private sector providers)
5. Cohousing (**INFO:** Cohousing communities are groups of houses, created, planned and run by their residents. Residents come together to make decisions about their community and share facilities/activities such as gardens, play spaces, maintenance and laundry facilities). Cohousing could be set up for residents that are similar ages or for different ages.
6. Temporary accommodation (**INFO:** Typically includes short-stay housing arrangements often due to lack of a permanent housing solution, like homelessness, displacement or domestic abuse. It includes forms of housing such as hotels, hostels, shelters or short-term rental properties)
7. Other
8. I don't know

ASK ALL OWNER-OCCUPIERS AT Q1 (CODES 1-3)

Q3. Thinking about your current home, are you the sole owner or do you own it jointly or partially with someone else?

Please select one option only.

1. Sole ownership
2. Joint ownership
3. Partial ownership (e.g. with family)
4. Owned by someone else (e.g. other relative)
5. Don't know

Q4. Thinking about your current home, for how long have you lived there?

Please select one option only.

1. Less than 1 year
2. 1-2 years
3. 3-5 years
4. 6-10 years
5. 11-20 years
6. More than 20 years
7. Don't know

Q5. How many people, including yourself, currently live in your household?

Please select one option only.

1. 1 person
2. 2 people
3. 3 people
4. 4 people
5. 5 or more people

Q6. How many bedrooms does your current home have? Please include any rooms that, when your home was built, were intended to be a bedroom even if they are not used as such as present and do not contain a bed.

Please select one option only.

1. Studio / bedsit
2. One bedroom
3. Two bedrooms
4. Three bedrooms
5. Four or more bedrooms
6. Don't know

Q7. Still thinking about your current home, who lives there with you?

Please select all that apply.

1. I live on my own **SINGLE CODE**
2. I live with my partner
3. I live with my partner and my children
4. I live with my parent(s)
5. I live with my grandparent(s)
6. I live with my grandchildren
7. I live with other tenants
8. Other

Section 2: Satisfaction with current property

Q8. Overall, how satisfied or dissatisfied are you with your current home?

Please select one option only.

1. Very satisfied
2. Fairly satisfied
3. Neither satisfied nor dissatisfied
4. Fairly dissatisfied
5. Very dissatisfied
6. Don't know

Q9a. Does your current home have any of the following adaptations?

Q9b. Do you intend to make any of the following adaptations to your current home in the next 5 years or so?

Please select all that apply.

1. Step-free access (no stairs) at the front of the property or up to the property from ground-level
2. A stair lift inside the property
3. A through-floor lift inside the property
4. A downstairs bathroom/shower room
5. Features or adaptations that make it easier to move around inside (e.g. wider doorways, handrails)
6. Features or adaptations that make it easier to use the kitchen
7. Features or adaptations that make it easier to use the bathroom (e.g. a wet room / level access shower)
8. Features or adaptations that make it easier to use heating and lighting
9. Assistive technology that makes it easier to live independently (e.g. pullcord/pendant, sensors, Alexa)
10. No none of these
11. Don't know
- 12.

Q10. To what extent do you agree or disagree with the following statements...

ROWS

1. My current home is suitable for my needs
2. I feel safe and secure in my current home
3. The location of my current home is convenient for my needs
4. My current home will not be suitable if my/ my households needs change in the future
5. I am satisfied with the size and the layout of my current home
6. The maintenance and upkeep of my current home are manageable
7. I worry my current home will be too expensive to keep warm in winter

COLUMNS

1. Strongly agree
2. Tend to agree
3. Neither agree nor disagree
4. Tend to disagree
5. Strongly disagree
6. Not applicable
7. Don't know

ASK IF Q10_4=1 OR 2

Q11. If adaptations (such as stairlift, wet-room/walk-in shower, wider doors, ramps, grab rails, downstairs bathroom) were made to your current home, would this make it more suitable to meet your/ your households' needs in the future?

Please select one option only.

1. Yes
2. No
3. Don't know

ASK IF Q4=1-3

Q12. You said you moved into your current home within the last five years, which two or three of the following were the most important reasons for moving to your current home?

Please select up to three responses

1. Moved to a larger house/ flat
2. Moved to a smaller house/ flat
3. Moved to a cheaper house/ flat
4. Moved in with family or friends
5. Moved to accommodation with additional care or support services provided
6. Moved to a nicer home
7. Moved to a better neighbourhood/ more pleasant area
8. Moved to be closer to family or friends
9. Moved to be closer to essential services (e.g. GP, hospital, dentist etc)
10. Moved to an area with better local amenities (e.g. shops, restaurants, leisure, transport)
11. Moved to take up a new job or to be in an area with more work
12. Moved because my friends/family wanted me to
13. Something else (please specify)
14. Don't know

ASK IF Q12=2-3

Q13. You said you moved to a smaller or cheaper property, why was that?

Please select all that apply.

1. To reduce housing costs (eg mortgage/ rent payments)
2. To reduce running costs (eg maintenance, heating/ fuel bills)
3. To release equity from your previous home
4. To make upkeep and maintenance more manageable
5. Something else (please specify)
6. Don't know

Section 3: Current needs and requirements

Q14. Which two or three of the following, if any, are **most important** to you personally in thinking about what makes a good **home**?

Please select up to three responses.

1. Sufficient space and living area
2. Private space in the home to work/for hobbies and be alone
3. Space for guests to stay overnight
4. Good storage space for essential items (e.g. clothing, food, vacuum cleaner)
5. Wheelchair accessible (i.e. both to and inside the home)
6. Free from hygiene issues (damp, pests etc)
7. A private garden
8. Off-street parking (front drive or garage)
9. Affordability (e.g. the cost of buying or renting a home)
10. Energy efficient (e.g. good insulation, energy efficient boiler etc)
11. A fast and reliable internet connection
12. Proximity to essential amenities (e.g. healthcare, shopping, transport)
13. Physically secure (i.e. locks on doors and windows, burglar alarm etc)
14. Community and social connections
15. Access to recreational facilities green spaces
16. Access to communal facilities (e.g. shared outdoor space/ a gym, either in the local community or onsite)
17. Access to cultural and/or religious amenities (e.g. place of worship, cultural shops)
18. Quality of neighbourhood and surrounding area
19. Pets are allowed within the home
20. Ability to live with family or extended family

21. Other (please specify)
22. None of the above
23. Don't know

Q15. Below are some suggestions for improving the housing situation for people in later life (i.e. people aged 55 years and over). Please select what you think are the most important to you personally based on your current needs.

Please select up to three responses.

1. Adapt existing homes of people in later life so the home is more accessible/ age-friendly.
2. Provide financial assistance to people in later life to adapt their existing homes to be more accessible/ age-friendly.
3. Improve the maintenance and upkeep of existing housing to ensure safety and comfort for people in later life.
4. Encourage development of new conventional housing that is more accessible/ age-friendly (e.g. smaller properties, bungalows, apartments with lifts)
5. Develop affordable housing specifically tailored to the needs of people in later life with lower incomes.
6. Provide more care homes.
7. Encourage development of alternative accommodation to care homes like extra care housing. **(INFO:** Occupied by a range of older people, some with higher level care or support needs. Residents live in self-contained homes, typically with access to communal facilities and onsite 24/7 care services, usually with a scheme manager and support staff. Often referred to as 'extra care housing' when provided by housing associations and local councils and 'assisted living', 'retirement living' or 'retirement village' by private sector providers)
8. Encourage development of 'retirement housing' that is accommodation which is only for people aged 55-60+ and is designed to suit older people
9. Develop partnerships with local organisations to provide support services to people in later life, including advice and information about housing options, home modifications and support/ healthcare assistance
10. Other
11. Don't know

Q16. On balance, how would you rate the range of alternative housing options that are available to you right now?

Please select one option only.

1. Very good
2. Fairly good
3. Neither good nor poor
4. Fairly poor
5. Very poor
6. Don't know

Q17. Based on information and/ or support available from your local authority or from other sources, how confident or not are you that you know the housing choices available to you?

Please select one option only.

1. Very confident
2. Fairly confident
3. Not very confident
4. Not at all confident
5. Don't know

Section 4: Propensity to move and preferences

Q18. How likely or unlikely are you to move to a different home in the next....

- A. ...12 months?**
- B. 1 to 2 years?**
- C. 3 to 5 years?**
- D. 6 to 10 years?**

- 1. Certain to
- 2. Very likely
- 3. Fairly likely
- 4. Fairly unlikely
- 5. Very unlikely
- 6. Certain not to
- 7. Don't know

Q19. Regardless of whether you are likely to move or not, if you did move to a different home in the future, how many bedrooms would you expect it to have?

Please select one option only.

- 1. Studio / bedsit
- 2. One bedroom
- 3. Two bedrooms
- 4. Three bedrooms
- 5. Four or more
- 6. I don't know

Q20. Regardless of whether you are likely to move or not, if you did move to a different home in the future, which one of these would you expect it to be?

Please select one option only.

- 1. A flat/apartment
- 2. A terraced house – that is, one that shares a wall on both sides
- 3. A semi-detached house – that is, one that shares one common wall with the next house
- 4. A detached house
- 5. A bungalow
- 6. Other
- 7. I don't know

Q21. Regardless of whether you are likely to move or not, if you did move to a different home in the future, which one of these would you expect it to be?

Please select one option only.

- 1. Property owned outright
- 2. Property bought on a mortgage (including shared ownership)
- 3. Rented from a private landlord or private housing developer
- 4. Rented from a social landlord (such as Local Authority or Housing Association)
- 5. Live rent free with family
- 6. Other
- 7. I don't know

Q22. Regardless of whether you are likely to move or not, if you did move to a different home in the future, which one of these would you prefer?

Please select one option only.

1. Living with other residents in a community all of a similar age
2. Living with other residents in a community with a mix of different ages
3. I don't know

Q23A. In planning for your future housing needs, if you had a free choice, which one of the following options would you prefer the most?

Q23B. And which, do you think is most likely?

Please select one option only for each.

A) Prefer the most B) Most likely

1. Staying in your current home without any adaptations (such as stairlift, wet-room/walk-in shower, wider doors, outdoor ramps, grab rails, downstairs bathroom)
2. Staying in your current home but with adaptations (such as stairlift, wet-room/walk-in shower, wider doors, outdoor ramps, grab rails)
3. Moving in with family or extended family
4. Moving to a different conventional home without any adaptations (such as stairlift, wet-room/walk-in shower, wider doors, outdoor ramps, grab rails,)
5. Moving to a different conventional home with adaptations (such as stairlift, wet-room/walk-in shower, wider doors, outdoor ramps, grab rails,)
6. Moving to a different home that has been designed to be accessible to older people from the outset (such as step-free access to the property and to toilets/bathrooms, wider doors, wall mounted switches, potential for downstairs bedroom)
7. Moving to sheltered/ retirement housing (**INFO:** Specialist housing usually for people over a specified age, often 55 years or 60 years which is typically self-contained homes usually with communal areas supported by a visiting scheme manager and access to an alarm service. Sheltered housing is offered for social or affordable rents, based on need, by local councils or housing associations. Retirement housing is similar but usually built by private developers for market sale or rent. It is sometimes referred to as 'Independent Living' or 'Retirement Living'.)
8. Moving to extra care housing (**INFO:** Specialist housing usually for people over a specified age, often 55 years or 60 years. Occupied by a range of older people, some with higher level care or support needs. Residents live in self-contained homes, typically with access to communal facilities and onsite 24/7 care services, usually with a scheme manager and support staff. Often referred to as 'extra care housing' when provided by housing associations and local councils and 'assisted living', 'retirement living' or 'retirement village' by private sector providers.)
9. Moving to a care home (residential care home or nursing care home) (**INFO:** Includes residential care homes where a number of older people live usually in single rooms, with access to on-site social care services like meals and help with washing and dressing, and nursing care homes which are similar but additionally provide care from qualified nurses. Care homes do not usually consist of self-contained units)
10. Something else (please specify)
11. Don't know

Q24. If you were to move to a different home in the future, which two or three of these, if any, are most likely to encourage you to move?

Please select up to three options.

1. Move to a more accessible home
2. Move to smaller home (e.g. more manageable living space/ requires less maintenance)
3. Move to a home where there is specialised care and support available onsite
4. Move to be closer to family or caregivers
5. Move to a cheaper home (e.g. more affordable mortgage or rent or cheaper running costs)
6. Move to a better or safer neighbourhood/ more pleasant area
7. Move to a home where there is an age-threshold to move in (e.g. retirement/sheltered housing for people aged 55 or 60 years and over)
8. Move to a home with better access to public transport, shops, health services and amenities
9. Move to somewhere where my cultural and/or religious needs can be met
10. Move to a home where there are staff available onsite
11. Move to be able to live with family or extended family members
12. Other (please specify)
13. I wouldn't want to move
14. Don't know

Q25. If you were to move to a different home in the future, what would you say are the main barriers, if any, to moving?

Please select up to three options.

1. Lack of suitable housing options to meet your needs
2. Complexity of the moving process (eg finding a property, dealing with agents/ solicitors)
3. Physical difficulties of moving due to poor or declining health
4. Being able to afford to buy or rent a different home
5. Costs associated with moving (eg hiring movers, storage, legal fees)
6. Reliance on home equity to afford to move
7. Limited or fixed income to be able to maintain and/ or adapt a different home
8. Moving away from your family, friends, neighbours or community social groups
9. Finding a different home with access to necessary support services (eg GP, hospital, dentist, transport)
10. Loss of independence and control
11. Personal attachments to current home
12. Fear of change moving to a new environment
13. Lack of information about housing choices
14. Other (please specify)
15. I wouldn't want to move
16. Don't know

Section 5: Finance and affordability

Q26. How concerned, if at all, are you with each of the following **at the moment**?

- A. Your ability to pay the rent/ your mortgage repayments
- B. Your ability to pay energy/utility bills
- C. Your ability to get by financially

1. Very concerned
2. Fairly concerned
3. Not very concerned
4. Not at all concerned
5. Don't know
6. Prefer not to say

Q27. Regardless of whether you are likely to move or not, if you did move to a different home in the future, how concerned, if at all, would you be with the following?

- A. Your ability to afford to buy or rent a different home
 - B. Your ability to pay the energy/ utility bills at a different home
 - C. Your ability to afford service charges (eg covering communal facilities and on-site staff) in specialist housing for older people (like retirement/ sheltered housing or extra care housing/ assisted living/ retirement village)
-
- 1. Very concerned
 - 2. Fairly concerned
 - 3. Not very concerned
 - 4. Not at all concerned
 - 5. Don't know
 - 6. Prefer not to say

Section 6: Your health

Q28. Do you have any physical or mental health conditions or illnesses lasting or expected to last for 12 months or more?

Please select one option only.

- 1. Yes
- 2. No
- 3. Don't know
- 4. Prefer not to say

Q29. Do any of your conditions or illnesses reduce your ability to carry out day-to-day activities?

Please select one option only.

- 1. Yes, a lot
- 2. Yes, a little
- 3. Not at all

Q30. How concerned, if at all, are you with the following **at the moment**?

- A. Your physical health
 - B. Your mental health
-
- 1. Very concerned
 - 2. Fairly concerned
 - 3. Not very concerned
 - 4. Not at all concerned
 - 5. Don't know
 - 6. Prefer not to say

Q31. And over the next 12 months, do you think each of the following will improve, stay the same or get worse?

- A. Your physical health
 - B. Your mental health
-
- 1. Improve a lot
 - 2. Improve somewhat
 - 3. Stay the same
 - 4. Get somewhat worse
 - 5. Get a lot worse
 - 6. Don't know
 - 7. Prefer not to say

Q32. Which one of the following statements best describes how you think about moving home?

Please select one option only.

1. Only when I develop health problems am I more likely to move home
2. I am more likely to move home before developing any health problems
3. Neither
4. Don't know

THANK AND CLOSE

About

About the Housing LIN

The Housing LIN is a sophisticated network bringing together over 20,000 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.



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