This subject paper is intended to be a research paper delving into different views and analyses from various sources. The views and analyses as contained in this paper are intended to stimulate public discussion and input to the planning process of the "HK2030 Study" and do not necessarily represent the views of the HKSARG.

WORKING PAPER No.12
AGING POPULATION AND PLANNING FOR THE ELDERLY

INTRODUCTION

1. This paper aims to provide a brief account of the key issues of population aging in Hong Kong, and relevant experience of other Asian cities and their implications for strategic planning in Hong Kong will also be examined.

BACKGROUND

2. The population of Hong Kong is aging rapidly at an unprecedented speed. According to Government's latest territorial population projections, the elderly population (aged 65 and over) in Hong Kong will reach 19.8% of the total population in 2029, or 1.8 million (Census and Statistics Department, 2000). Planning is needed to provide for the needs of the aged population.

3. To plan for services for the elderly, the Report of the Working Group on Care for the Elderly (1994) has laid down the following guiding principles:
   a. Dignity of the elderly - the dignity of older persons in society must be recognized and respected, and this can be enhanced through promoting a sense of security, a sense of belonging and a sense of worthiness;
   b. Care in the community and ageing in place - elderly persons and their families should be supported through family care and community services to enable the elderly to grow old in their home environment for as long as the elderly person desires with minimal disruption; and
   c. Continuum of care and integration of services - an integrated approach in providing services to meet the different levels of care needs of the elderly so as to enable them to stay in familiar surroundings and with minimal duplication.

4. In July 1997, the Elderly Commission (EC) was formed and was charged with the responsibility of advising the Government on policies and services for the elderly. The EC has adopted an integrated approach to the planning and provision of services for the elderly. One of its stated goals is to strengthen the care for the elderly by:
   a. Improving their quality of and zeal for life;
   b. Stepping up inter-generational communications; and
   c. Providing the elderly with a sense of security, a sense of belonging and a feeling of health and worthiness (EC, 1999).

5. The Chief Executive in his policy address delivered in October 1997 identified “Care for the Elderly” as one of his four Strategic Policy Objectives. The Secretary for Health and Welfare will take the matter forward with relevant parties within and outside the Government.

BASELINE REVIEW

6. Geographically, the elderly population is unevenly distributed in Hong Kong. In 2000, in terms of the proportion of elderly population of Usual Residents, Wong Tai Sin and Sham Shui Po ranked at the top. Over 16% of the residents in these two districts were elderly. In comparison, the elderly persons constituted only 7% of the population in Tuen Mun in the same year. Furthermore, the aging process seemed to be more rapid in those districts that already had a high proportion of elderly persons. According to the latest forecast, Wong Tai Sin, Sham Shui Po and Wan Chai have the highest percentage of elderly people in its district in 2010.

7. The Housing Bureau has also assessed the housing demand for the elderly for the period from 1999/2000 to 2008/2009. About 73,000 households require elderly housing each year. The Hong Kong Housing Authority (HKHA) Comprehensive Redevelopment Program will demolish 566 old housing blocks for redevelopment by 2005/6. The Program also aims at creating a more balanced community with different housing types provided to meet the needs of the different age groups, including the elderly residents.

8. The “Survey of Housing Aspirations of Households” (Executive Summary) in 1999 indicated that about 14% of the elderly households intended to move house in the next ten years, and 15% of them, or about 4,000 elderly households, preferred to
Some elderly people are more vulnerable than others. For example, over 60,000 elderly people lived in 14 Tertiary Planning Units (TPUs) with a high concentration of poor housing. Furthermore, about 25% of the elderly population lived either alone or with only their spouses (Yeh, 1999).

**EMISSION TO THE MAINLAND**

Due to the high cost of living (especially cost of housing) in Hong Kong, some elderly persons had expressed their wish to move to the Mainland for retirement in order to maintain a reasonable level of living standard. A number of surveys were conducted between 1999 and 2000 on the elderly persons’ intention to emigrate to the Mainland. The results of some of the more publicized ones are listed below:

- **a.** The “Survey of Housing Aspirations of Households” (Executive Summary) in 1999 indicated that 1.7% of all elderly households had planned to emigrate, 3/4 of them wanted to live in the Mainland. Lower cost of living and family reunion were the most frequently cited reasons;

- **b.** A survey conducted by the "Hong Kong-China Relation Strategic Development Research Fund" in April 2000 suggested that 14.3% of the elderly had considered emigrating to the Mainland. This figure was one of the lowest among all age groups;

- **c.** A survey conducted by the Democratic Alliance for the Betterment of Hong Kong in April 2000 suggested that 33.7% of respondents of all age groups would like to emigrate to China when they retire; and

- **d.** A study of the Hong Kong Transition Project in 1999 indicated that air pollution and overcrowding were the two main reasons that Hong Kong residents might consider moving abroad, but very few elderly persons appeared to have considered retiring outside Hong Kong (SCMP, 8.8.1999).

The Social Welfare Department launched the Portable Comprehensive Social Security Assistance Scheme (PCSSA) in 1997 to provide the elderly persons with a choice to retire in the Guangdong Province. A review of the scheme conducted by the Hong Kong Red Cross in 1998 highlights the needs and concerns of the elderly wanting to emigrate to the Mainland:

- **a.** 60% of the recipients were over 80 years old, while only 34% were 70 to 79 years old, indicating that the scheme was most popular among the "old-old"; some 45% of these elderly lived in public housing before retiring in Guangdong;

- **b.** The most popular destinations were Jiangmen (江門), Guangzhou (廣州), Foshan (佛山) and Dongguan (東莞);

- **c.** The most frequently cited reason for leaving for Guangdong was neither financial nor about the quality of life in Hong Kong. Over 75% of the respondents claimed that the main reason was the availability of family support and care in the Mainland;

- **d.** The main concerns of the recipients were about the high medical expense in Guangdong, escort services back to Hong Kong, burial fees, the right of getting back a housing unit from the Housing Authority should they choose to return, and the remittance of benefits in the Mainland.

Although the surveys show varying results, these findings should be interpreted with caution because the intention or the aspiration to move does not equate the actual decision or immediate action to move. The choice to move to mainland for retirement would be much affected by various factors such as the services available in the Mainland, the quality of life in Hong Kong, especially for senior residents and the policy assistance available for such move.

**KEY CONCERNS AND PLANNING ISSUES**

Since elderly persons tend to have a more restricted local activity space, the design of local environment and the provision of local facilities are important to the elderly. The followings are factors that are crucial in providing a suitable local environment for elderly people (Phillips, 1997):

- Physical aspects - housing design to facilitate a safe, comfortable and quality environment such as provision of hand grips, minimized stairways, minimized gradients and so on;
- Services - accessibility, price and range of services;
- Transportation - accessibility and affordability;
- Safety and security;
- Community facilities - social centres, clubs, open spaces, meeting spaces and sources of informal support contacts; and
- The interlinkages of all the above.

Researchers have stressed the importance of the interlinkages of all the factors mentioned above, which means both physical and social aspects in service provision have to be considered in concert. In other words, an inter-disciplinary and integrated approach in the planning of service provision to the elderly is considered vital (Phillips, 1997; Leung, 1997; Chow, 1997).
EXPERIENCE OF OTHER ASIAN CITIES

16. Since population aging is a world phenomenon, some cities are taking proactive approach in coping with this new challenge. For example, in Singapore, about one quarter of the population will be above 60 years old by 2030 (about half a million will be in their late 60s or early 70s). Hence, the Singapore 21 Committee, which was launched by the Prime Minister in 1997 to strengthen the intangible "heartware" of Singapore in the 21st century, considered 'the needs of the senior residents vs. the aspirations of the young' as one of the five dilemmas confronting Singapore.

17. In response, the Government of Singapore (GOS) will double its healthcare budget to about 8% of the GDP by 2030 to strengthen the medicare system and the community-based care program. Both public and private initiatives were recommended to address the complex issues arising from a greying population. The GOS had also decided to allow the voluntary welfare organisations and the private sector to take over its role of building and operating nursing homes. To encourage the development of nursing homes, the GOS will tender out at least ten sites for such homes by 2010. To promote stronger family ties, the GOS has designed flexible "white" housing flats with no fixed partition in order to accommodate the extended family (three generation households could stay under the same roof) and encourage active 'grandparenting'.

18. Tokyo is another Asian city which faces similar challenges. The population of the elderly aged 65 or over in Tokyo will increase sharply to about 2.83 million in 2015 (equivalent to about one quarter of the total population). About one in every three households will have a head of house who is 65 or over.

19. In the "Tokyo Plan 2000" (A strategic plan to describe the vision for Tokyo), the Metropolitan Government recognises the elderly as a vital force to support the society (in terms of their knowledge, experience and skills). The importance of promoting the care ability of the community is taken as one of the policy goals. Measures for supporting independent living of elderly persons, the design of barrier-free housing and provision of special nursing homes for every 1,000 people aged 65 and over are proposed. Moreover, indicators for improving social activities of the elderly of 65 to 74 years of age are used as standards in measuring the attainment of policy objectives.

20. In brief, experience of the above cities indicates that the issues related to aging population are very complex and require cross-sectoral policy co-ordination and commitments. In terms of resource allocation and optimisation, a proactive approach with preventive measures will be more efficient and effective in tackling the issues arising from an aging population. For example, an early health-screening plan with national subsidy for persons aged over 55 years will help minimise the need to provide long-term institutional care for the elderly. Strategic planning for the elderly involves various policy areas and often goes beyond the land use planning dimension. As far as physical planning is concerned, meeting the housing needs of the senior citizens has always been accorded with high priority.

STRATEGIC PLANNING IMPLICATIONS FOR HONG KONG

21. For strategic planning purposes, two land use concepts are identified in helping to plan for the elderly in a more comprehensive manner. The first is the "integrated environment" where age-sensitive social and physical infrastructure is provided. The second is the concept of "retirement community", which tends to target at senior citizens.

Integrated Environment

22. An example of an integrated environment is Minnesota, which, is experiencing rapid population aging similar to Hong Kong. By 2030, the state is expected to have 1.2 million persons over 65 years of age, or one quarter of the population. In response to this "senior boom", the state government launched "Project 2030" in 1997, the vision of which is outlined as follows:

a. "More Minnesota communities in 2030 will be truly livable for all age groups. They will be inter-generational and life-cycle in nature, offering diverse choices that provide for the future needs of all residents;"

b. "Communities in 2030 will support the ability of older people to live longer independently; and"

c. "Communities in 2030 will offer a wide array of volunteer and social interaction opportunities for all community residents including elderly persons, which will help build the personal and social relationships necessary to create support for people of all needs and abilities."

23. The initiatives in "Project 2030" relating to land use and infrastructure planning are summarized below:

a. A range of housing options for households of different ages and sizes and people with different levels of ability and income;

b. Creation of lifecycle communities (communities suitable for all age groups) through their housing plans;
24. An integrated environment when applied in Hong Kong would, in the long run, aim at the creation of an environment that meets the needs of people of all age groups in all districts. However, those districts where there are high concentrations of elderly persons could be the targets for more immediate measures. Elements of an integrated environment for Hong Kong could include:

   a. Housing for the elderly that is inter-mingled with other types of housing;
   b. Public spaces that facilitate interactions among all age groups;
   c. Public transportation that are accessible for all;
   d. Medical and social welfare services that are provided in one conveniently located facility where possible; and
   e. Integrated community care facilities providing one-stop long-term care services and support which are required by elders and their families.

25. The key advantage of having an integrated environment in Hong Kong is that it is in agreement with the principle of aging in place. Furthermore, the forthcoming urban renewal schemes will create opportunities to redevelop old areas with a co-ordinated design for an integrated environment. With a holistic orientation, this approach would provide a more thorough improvement in planning and providing services to the elderly so that they would not be segregated as a fragile social group. This would demand a collaborative approach among the concerned bureaux and departments in planning for the elderly at the local and district level. An effective co-ordinating mechanism would be necessary to accomplish the desired results.

26. HKHA is taking the initiatives to support and encourage “ageing in place”. The concept has been translated into building design and adopted in some new estates. Universal design of new flats enables easy conversion to accommodate changing needs of the ageing residents in future. Moreover, a range of elderly housing types are available to suit different needs.

Retirement Community

27. Retirement Community is designed mainly for the elderly, providing a residential rather than an institutional setting. Retirement communities can be established either within or outside Hong Kong.

28. Retirement communities can be categorized according to the level of care they provide: from adult independent living to assisted living on a daily basis. An example of a retirement community providing several levels of care is Elliot Lake of Ontario, Canada. It markets itself as a city for active retirees from across the country. It features affordable housing both for sale and rental, a number of interest clubs and organizations, medical facilities, and an "Institute for Learning in Retirement". To diversify its economy, it also tries to promote tourism and businesses, and attracts people of other age groups to live there.

29. Retirement communities in Hong Kong could aim at giving elderly people in need priority access to affordable housing, and to ensure an adequate supply of flats with suitable facilities and services for them. The private sector can be encouraged to provide affordable housing to the elderly in the form of retirement community.

30. The Hong Kong Housing Society (HKHS) has already embarked on a Senior Citizen Residence Scheme. Subsidized flats will be leased for life to the elderly in the middle-income group, giving them access to purpose-built accommodation with integrated care services. Two sites, one at Tseung Kwan O and one at Ngau Tau Kok, have been granted to HKHS at nominal premium. A total of 540 units, mostly one-bedroom flats, will be provided.

31. The Government is developing a pilot scheme for the provision of elderly housing by private developers. Details of the pilot scheme are being formulated for consultation with the Elderly Commission.

32. Retirement communities can also be established outside Hong Kong. Some legislators have urged the Government during the LegCo meeting on 12.4.2000 to explore actively the feasibility of establishing "estates for the elderly" in those Mainland cities in which most elderly persons choose to settle. Such proposal would have implications on the formulation of development scenarios for HK2030. In response to the legislators’ concerns, the Housing Bureau will explore the feasibility of providing assistance to the elderly who wish to settle in the Mainland.

33. Some initial thoughts on the pros and cons of establishing retirement communities in the Mainland are set out as follows:

   Pros:
   a. providing more choices and more affordable housing for the elderly people;
   b. meeting the aspirations of those who have indicated their desire to retire in the Mainland;
   c. improving the standard of living of the elderly people who have moved to the Mainland as they may afford to spend more money on other essentials such as food, health care and leisure;
   d. relieving the demand for local housing, health care facilities and other elderly facilities;
c. promoting greater competition in elderly service provision; and
f. strengthening social ties with the Mainland cities.

Cons:

a. requiring complimentary assistance to ease the elderly persons’ concerns and worries on the high medical expenses in the Mainland, lack of emergency support such as escort services, before they are willing to emigrate to the Mainland;

b. requiring understanding and support of the Mainland Authorities to accept the influx of elderly migrants which may have resource implications on their development;
c. reducing the demand for local housing for the elderly may indirectly affect the personal services sector and the housing markets. The cumulative impact on the economy is difficult to assess since some people may consider the elders as potential customers; and

d. reducing the social ties with Mainland cities.

34. It should be noted that the land use concepts suggested above are not mutually exclusive as (as highlighted in paragraphs 24 and 25). With effective co-ordination, the design and layout of new development areas and urban renewal areas could be planned in a comprehensive manner to provide a better environment for the elderly. There are pros and cons in establishing retirement communities in the Mainland (as highlighted in paragraphs 32 and 33 above) and their implementation would require close cooperation between Hong Kong and Mainland cities.

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