

Developing Bromley's Local Plan

Accommodation Choices for an Ageing Population, Initial Evidence Base

March 2014

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Accommodation Choices for an Ageing Population – Initial Evidence Base

1. Background

National

- 1.1. The National Planning Policy Framework encourages planning authorities to “plan for a mix of housing based on current and future demographic trends” and to consider a range of housing, including for older people, in local housing market assessments.
- 1.2. With an ageing population the importance of planning appropriately for older person accommodation has been the subject of much research.
- 1.3. A 2012 study for Shelter and the Joseph Rowntree Foundation (“A Better fit? Creating housing choices for an ageing population” (April 2012) focused on accommodation choices for “older persons households”, (aged 55 and over - the general lower age limit for residential developments for older people). Key findings indicate that:
 - Nationally one in three people are projected to be aged 55 and over by 2030.
 - Of all older person households around 80% live in private tenures whilst 20% are social renters
 - Of the specialist housing stock around 70% is social rented with 30% in private tenures (private rented or owner-occupation).
 - 68% of older homeowners live in a home that has at least two spare bedrooms.
 - Over a third of older people are interested in the idea of retirement housing either now or in the future, suggesting a latent demand for this market

Regional

- 1.4. The South East London Housing Partnership (Bexley, Bromley, Greenwich, Lewisham and Southwark) have commissioned a Strategic Housing Market Assessment (SHMA) for the sub-region. This study will assess current and future housing needs and requirements in the area, including the impact of the aging population.
- 1.5. The London Mayor published Supplementary Planning Guidance on “Housing” in November 2012. The guidance reflects that national picture indicating that at present, across London as a whole, most specialist housing for older Londoners is in the social rented sector whereas most of the future requirement is likely to come from people who are currently owner occupiers. (3.1.29).
- 1.6. The London Assembly Housing Committee published as report “Homes for Older Londoners: Building healthy homes for a comfortable and independent retirement Nov 2013). The report advised
“There are tremendous gains to be had from providing older Londoners with the type of homes they need. People living in homes larger than they need often face high heating expenses and the cost to the NHS of a heart attack brought on by a cold home is around £20,000. Older homes are often unsafe and trip and fall hazards increase as people age. Half of people older than 80 fall at least once a year and the cost to the NHS of

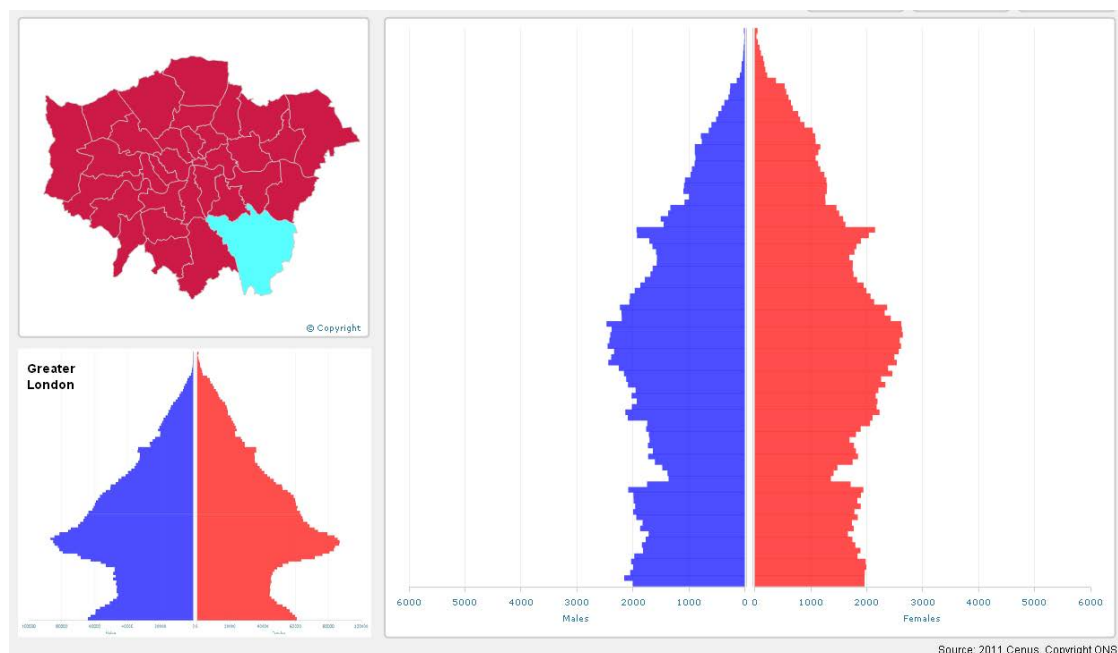
a fall resulting in a broken leg is more than £25,000. Reducing the likelihood of falls by providing specially designed homes has the potential to produce huge savings. By downsizing to specialist housing much needed family housing is also made available for other Londoners.”

The London Plan

- 1.7. The London Plan 2011 Policy 3.8 Housing Choice requires boroughs to identify the range of needs likely to arise within their areas and ensure that account is taken of the changing age structure of London's population and, in particular, the varied needs of older Londoners, including for supported and affordable provision.
- 1.8. “Draft Further Alterations to the London Plan” (FALP) (Jan 2014) highlights the significant predicted increases in older Londoners and research suggesting that the choices open to older Londoners to move into local specialist housing may have been constrained through inadequate supply. The FALP suggests that over the period 2015 – 2025 older Londoners may require 3,600 – 4,200 new specialist units per annum, broken down broadly into 2,600 private units pa, 1,000 in shared ownership and some 300 new affordable units. It also suggests a possible requirement for new bedspaces in care homes. The FALP sets out indicative annualised strategic benchmarks to inform local borough targets

2. Bromley's Older People

- 2.1. Bromley has the largest elderly population in of all London boroughs and a greater proportion of people aged 85 and over than any other London Borough.



- 2.2. The London Datastore Demographic Analysis 2011 population pyramid above illustrates the contrast with London's population. The London population pyramid has a distinctive triangle shape highlighting the significant population cohorts between 25 – 35yrs olds tailing off steeply with increasing age.

Bromley's pyramid, by contrast, does not have the sharply defined pyramid shape and is more evenly distributed throughout the cohorts. In addition to the large retirement population Bromley's pyramid illustrates a significant pre retirement cohort (63 and 64 years in 2011) who, now, in 2014 contribute further to the retirement age (65yrs+) population which forms over 15 % of Bromley's population compared to 11% across London as a whole. A further significant and sustained bulge can be seen for those aged 40 – 47 in 2011, hence the proportion of older people in Bromley, relative to the overall Borough population is anticipated to continue to increase over the plan period.

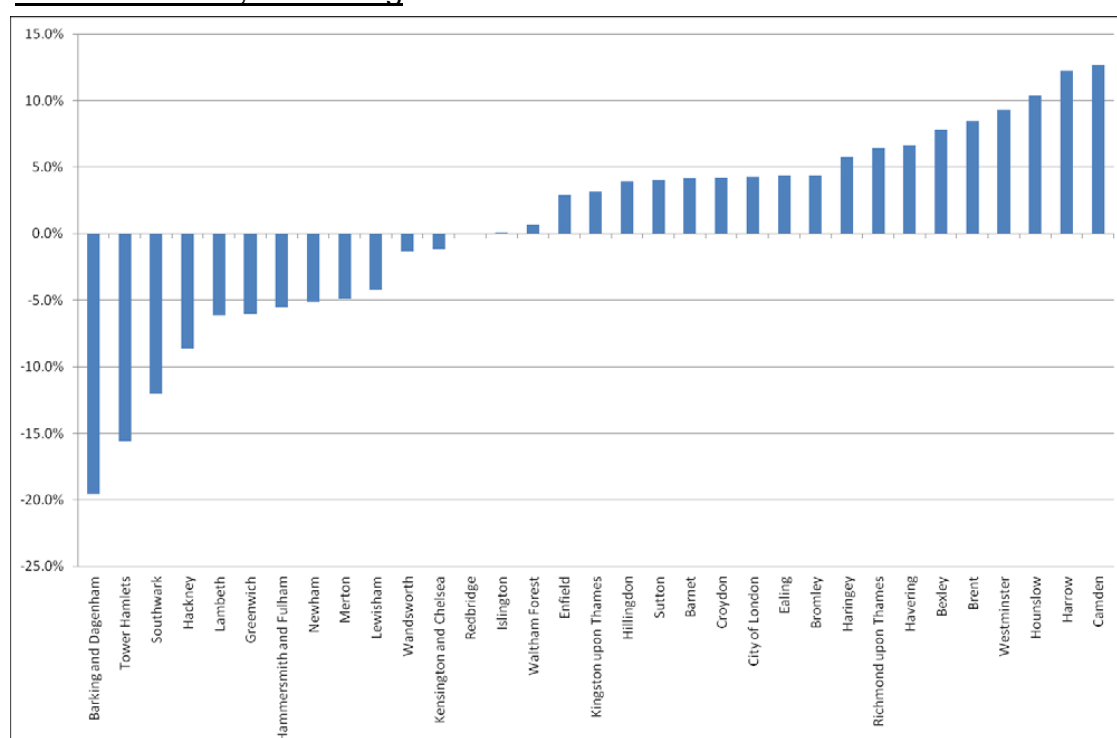
- 2.3. The POPPI (Projecting Older People Population Information) System forecasts aspects of the older people population. The table below sets out population projections for 65yrs+ and 85yrs+.

	2012	2014	2016	2018	2020
Population aged 65 and over	54,200	56,500	57,900	59,200	60,400
Population aged 65 and over as a proportion of the total population	17.24%	17.52%	17.50%	17.45%	17.37%
Population aged 85 and over	8,000	8,500	9,100	9,600	10,000
Population aged 85 and over as a proportion of the total population	2.54%	2.64%	2.75%	2.83%	2.88%

POPPI Crown copyright 2012. Figures may not sum due to rounding

- 2.4. The table above illustrates the current increased proportion of over 65+, peaking in 2014, reflecting the transition of the large pre retirement cohort from the 2011 Census into retirement. Following this bulge the proportion of over 65s drops away slightly to 2020 although not to 2012 levels and the actual numbers continue to increase by around 4,000 from 2012 to 2020.

Percentage population change in London boroughs of persons aged 65 and over 2001-2011, ascending

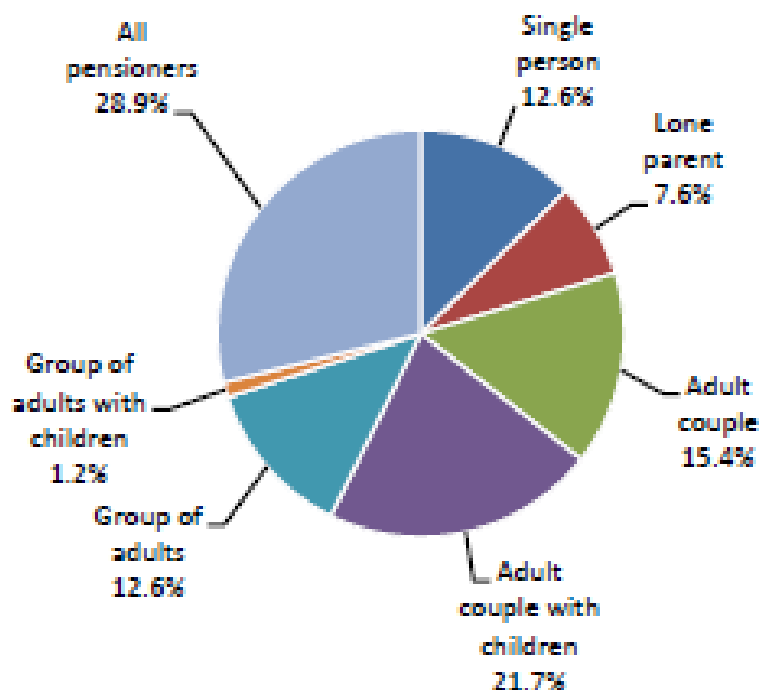


- 2.5. With regard to the 85+ age group both the proportion and number of people in this age group rise steadily over the period due to improved health outcomes for older people. The census data (as illustrated earlier in the population pyramid) suggests that this trend will not alter until the likely significant increase when the current cohort of recently retired (65years) turn 85 (2032). It is important to note that the POPPI data, is based on the latest Office for National Statistics (ONS) subnational population projections available for England, which are interim 2011-based and project forward the population from 2011 to 2021.
- 2.6. A full 25 year set of census-based population projections will be available from ONS in May 2014, however GLA analysis of the 2011 Census early releases, in the graph below indicate which boroughs are experienced increases in the population aged 65+. NB this does not reflect the significant increase experienced in Bromley since 2011.

Older Persons Households

- 2.7. Bromley has around 35,000 households over 65 years old projected to increase to 41,019 households by 2021.

Household Type



Bromley Household Survey 2009

Older People Living Alone

- 2.8. Bromley has a significant number of elderly people living in their own homes. The POPPI figures below illustrate both the gender breakdown of the lone elderly population and the projected increases to 2020.

People aged 65 and over living alone, by age and gender, in Bromley projected to 2020

Population predicted to live alone	2012	2014	2016	2018	2020
Males aged 65-74	2,560	2,720	2,800	2,820	2,800
Males aged 75 and over	3,604	3,774	3,842	4,012	4,250
Females aged 65-74	4,410	4,650	4,830	4,920	4,920
Females aged 75 and over	9,821	9,943	10,004	10,309	10,614
Total population aged 65-74	6,970	7,370	7,630	7,740	7,720
Total population aged 75 and over	13,425	13,717	13,846	14,321	14,864

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- 2.9. The table below also describes the situation in adjoining boroughs. There is a distinct difference in the scale and trends affecting the elderly population in inner and outer London boroughs and the boroughs beyond London. Looking specifically at the 75+ age group there is a projected increase of 38% (5,100 people) to over 18,000 by 2030. The 4 adjoining inner London boroughs exhibit percentage increases between 20% and 28% (and a combined additional 5,700 people over 75+yrs living alone) the adjacent outer London Boroughs of Bexley and Croydon have somewhat higher percentage increases, with Bromley continuing to have the highest number of 75+ living alone but Croydon also experiencing significant increases. The 3 adjoining boroughs beyond Greater London show significant percentage increases, together predicted to produce a further 7,600 lone elderly residents.

Total Population Aged 75+ Predicted to Live Alone in Bromley

Boroughs	2012	2030	Increase	% Increase
Bromley	13,608	18,704	5096	37.5
Croydon	11,160	16,487	5327	47.7
Bexley	9,416	12,700	3284	34.9
Greenwich	6,600	7,951	1351	20.5
Lewisham	5,861	7,490	1629	27.8
Southwark	6,309	7,877	1568	24.9
Lambeth	5,421	6,547	1126	20.8
Sevenoaks (Kent)	5,400	8,474	3074	56.9
Dartford (Kent)	3,582	5,326	1744	48.9
Tandridge (Surrey)	3,955	6,744	2789	70.5

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- 2.10. The Mayoral Housing SPG (Nov 2012) notes that not only are the numbers of older people growing, but the average number of years people survive with a disability or long term illness is increasing and is likely to be a long term structural change in London society.

- 2.11. Given the number of older households, the significant numbers of elderly people currently living alone and the projected increases the Housing SPG advises that it will be important to provide accommodation attractive to older people, giving appropriate housing choices to those who may wish to downsize and potentially releasing family accommodation onto the market.

Projections for Limiting long term illness in Bromley

	2012	2014	2016	2018	2020
People aged 65-74 with a limiting long-term illness	8,948	9,469	9,859	9,924	9,924
People aged 75-84 with a limiting long-term illness	9,203	9,302	9,154	9,400	9,843
People aged 85 and over with a limiting long-term illness	4,556	4,841	5,183	5,467	5,695
Total population aged 65 and over with a limiting long-term illness	22,708	23,612	24,196	24,792	25,463

POPPI Crown copyright 2012. Figures may not sum due to rounding

- 2.12. Given the number of older households, the significant numbers of elderly people currently living alone and the projected increases the Housing SPG advises that it will be important to provide accommodation attractive to older people, giving appropriate housing choices to those who may wish to downsize and potentially releasing family accommodation onto the market.

Migration of over 65's in and out of Bromley

- 2.13. The census provides information regarding moves into and out of the Borough and the origins and destinations of those moving. The data is rounded for each flow to preserve the highest level of precision possible while avoiding disclosure, there is therefore a margin of deviation. The table of movements reveals the relatively small scale of migration flows of those 65+ during 2011 with the rounded figures suggesting 170 people over 65years moved into the Borough whilst 330 left, giving a net outflow of 160 people over 65 years of age.
- 2.14. The net inflows come chiefly from inner London Boroughs and the net outflows to boroughs beyond London and across the country.

Moves into and out of Bromley during the year ending June 2011 of people 65yrs+
(London Boroughs and neighbouring boroughs highlighted)

Area	inflow	outflow	net (inflow - out flow)
Lewisham	110	50	60
Southwark	40	10	30
Lambeth	20	0	20
Greenwich	30	20	10
Wandsworth	10	10	0
Croydon	60	60	0
Westminster	10	-	10
Sutton	10	0	10
Havering	10	0	10
Bexley	50	60	-10
Hillingdon	0	10	-10
Hastings	10	0	10
Worthing	0	10	-10
Chichester	0	10	-10
Wiltshire UA	0	10	-10
Huntingdonshire	0	10	-10
New Forest	10	0	10
East Dorset	0	10	-10
West Dorset	0	10	-10
Southend-on-Sea UA	0	10	-10
Arun	0	10	-10
Medway UA	10	10	0
Mid Sussex	0	10	-10
Lewes	0	10	-10
Swale	0	10	-10
Shepway	0	30	-30
Cornwall UA	0	10	-10
Dover	0	10	-10
Horsham	0	10	-10
Eastbourne	10	10	0
Thanet	10	10	0
Reigate and Banstead	10	10	0
Ashford	0	10	-10
Canterbury	0	10	-10
Rother	10	20	-10
Wealden	10	10	0
Dartford	10	10	0
Maidstone	-	30	-30
Tandridge	10	20	-10
Tunbridge Wells	0	10	-10
Tonbridge and Malling	0	20	-20
Sevenoaks	30	70	-40

3. **Accommodation Choices**

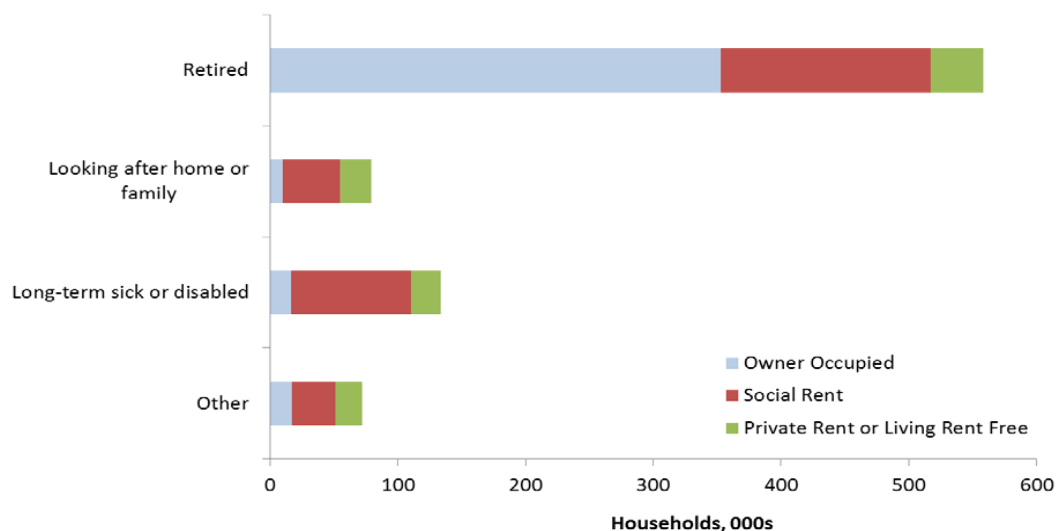
Models of accommodation

- 3.1. Models of accommodation designed for older people are changing and will continue to evolve over the plan period as new alternative models are developed. Over the last decade there has been a reduced reliance on residential care homes and a shift towards alternative services designed to enable people to retain their independence and remain living in the community with appropriate support.
- 3.2. Specialist older persons accommodation covering a spectrum of provision. These self-contained units vary in tenure and are primarily the individual's home but with communal facilities and the degree of support varies from retirement flats with design features and support services available to enable self-care and independent living, to "Extra Care Housing".
- 3.3. Extra care provision comes in a variety of forms and may be described in different ways, for example 'very sheltered housing', 'housing with care', 'retirement communities' or 'villages'. The support services may be provided round the clock and can be flexible to accommodate fluctuating needs. This form of provision provides improved opportunities particularly for the physically frail, and for people with dementia, reducing the demand for residential care, however there remains a potential growth in demand for both nursing and residential "Elderly Mentally Ill" (EMI) provision.

Housing Tenure of Older Households

- 3.4. Nationally, around 70% of the specialist housing stock is social rented with 30% in private tenures (private rented or owner-occupation). Similarly in Bromley there are significant differences between the housing tenure older and other households. Whilst over 75% of all older households own their home outright, only 13% of all older person households in the borough live in the social rented sector. (Bromley Household Survey 2009).

Tenure of Retired (over 65) Households



Bromley Household Survey 2009

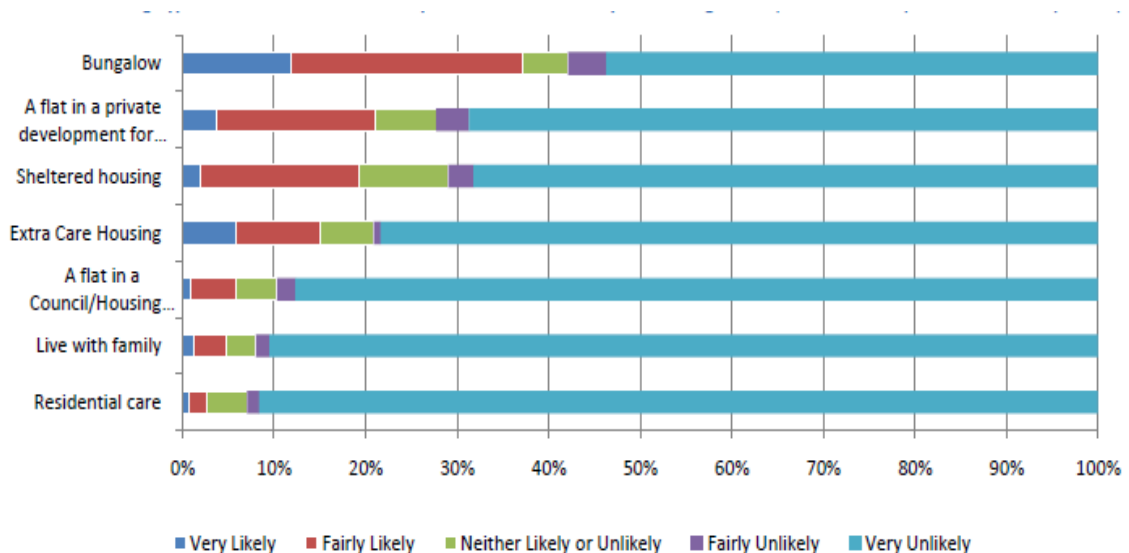
Existing Stock of Elderly Persons Accommodation in Bromley

- 3.5. The Elderly Accommodation Counsel database provides information to the public of elderly accommodation (both public and private sector). Their website indicates almost 3,900 units are available in the London Borough of Bromley, two third of which are subsidised units (63% for rent and 3% shared ownership) with the remaining 1/3, being available for sale. This equates to less than 1,300 units out of a boroughwide stock of over 120,000 private dwellings - marginally over 1% of all dwellings in the boroughs private dwelling stock.

Likelihood of moving

- 3.6. Polling by the think-tank Demos, indicated that nationally 58% of older people are keen to move and one in four is interested in the idea of a retirement property. (The Economist Jan 2014).
- 3.7. Respondents to the Bromley Household Survey 2009, aged over 60 years were asked about types of accommodation they were likely to consider moving to in the future. The Figure below shows that almost 40% of all household respondents aged over 60 years felt that it was likely they would consider moving to a bungalow in the future. Around 20% were also likely to consider a flat in a private development for retired people or sheltered housing. Around 20% were also likely to consider a flat in a private development for retired people or sheltered housing.

Likelihood of Considering Types of Accommodation People Become Older



Bromley Household Survey 2009

- 3.8. A 2008 Study for the International Longevity Centre “Building Our Futures” highlighted a number of points regarding likelihood of moving, noting that :
- Plans to move decline dramatically with age; owner occupiers without mortgages who do not move before they are 70 years old are unlikely to voluntarily move from their homes
 - Socio- economic groups AB/C1 are most likely to consider moving to older persons accommodation, possibly because their financial means will allow more choice and quality.
 - Current demand is not a good indicator of need and future choices

4. **Estimates of Likely Future Need**

- 4.1. As indicated above the South East London Housing Partnership have commissioned a Strategic Housing Market Assessment (SHMA) for the sub-region which will consider the impact of the aging population. The Mayoral Housing SPG (Nov 2012) advises that Boroughs should plan positively for specialist provision for older people, including through local plan allocations and suggests the demand for specialist older persons tenure by tenure and the demand for care home places in the London Plan Housing Supplementary Planning Guidance (SPG) Annex 5 & 6.

London Plan Housing SPG (Nov 2012) Annex 5 (extract below)

- 4.2. Annex 5 of the Housing SPG considers Older Persons Housing Demand make two projections with High and Low affordable housing supply scenarios (an extract which includes the neighbouring boroughs of Bexley, Croydon and Greenwich is attached below).
- 4.3. It illustrates Bromley as having an oversupply of rental under both the high and low scenario. Both scenarios illustrate a requirement of 30 units p/a and 56 units p/a for shared ownership and sale respectively.

ANNEX 5 - OLDER PERSONS HOUSING DEMAND

Table 3.1 Annual potential demand for specialist older persons housing by borough and tenure 2011-2021 (high and low affordable housing supply scenarios)

	Shortfall/Surplus High Supply (pa)				Shortfall/Surplus Low supply (pa)			
	Sale	SO	Rent	All	Sale	SO	Rent	All
B&D	41	10	-42	9	41	10	16	67
Barnet	69	26	-78	18	69	26	14	110
Bexley	17	21	-69	-32	17	21	0	38
Brent	86	21	-14	94	86	21	47	154
Bromley	56	30	-121	-35	56	30	-10	76
Camden	42	8	-104	-54	42	8	-8	42
City	na	na	na	na	na	na	na	na
Croydon	85	29	-129	-15	85	29	-12	103
Ealing	101	23	-53	71	101	23	29	153
Enfield	55	23	-62	16	55	23	13	91
Greenwich	62	14	-60	16	62	14	29	105

London Plan Housing SPG (November 2012) Annex 6 (extract below)

- 4.4. Annex 6 also points to a potential demand for 465 care home places. It is important to note that the figures reflect a “high scenario” on the basis of 10% of persons aged 85yrs+.

ANNEX 6 - CARE HOME PLACE DEMAND

Total potential demand for care home places 2011- 2021 10% of persons aged 85 and over

Demand 10% of over 85s	care home beds 2009	need 2021	Shortfall/ Surplus		care home beds 2009	need 2021	Shortfall/ Surplus
Barking	303	518	215	Islington	303	394	91
Barnet	792	1081	289	K+C	109	441	332
Bexley	307	770	463	Kingston	493	494	1
Brent	480	972	492	Lambeth	564	514	-50
Bromley	669	1134	465	Lewisham	639	449	-190
Camden	120	640	520	Merton	519	658	139
Croydon	961	1128	167	Newham	309	461	152
Ealing	548	1026	478	Redbridge	492	771	279
Enfield	551	864	313	Richmond	366	602	236
Greenwich	463	790	327	Southwark	503	557	54

Source: Cambridge et al 2012 *ibid*

- 4.5. The Annexes indicate that at present, across London as a whole, most specialist housing for older Londoners is in the social rented sector whereas most of the future requirement is likely to come from people who are currently owner occupiers. Across the capital, provision of new specialist housing has been uneven and has only averaged 1,200 units pa. Some boroughs have a surplus of affordable specialist housing (some of it in need of modernisation), but all have a shortfall of private provision, and the modest demand for shared ownership from older households is not being met... Depending on whether existing levels of provision are maintained and on the levels of need among older Londoners, there may also be a requirement for some 500 new bedspaces” (para 3.1.29).
- 4.6. The Further Alterations to the London Plan (FALP), published Jan 2014 includes indicative annualised strategic benchmarks to inform local targets. The FALP strategic benchmarks set out below, reiterate the zero requirement for affordable rented units, but suggest a significant Bromley requirement of 140 units for private sale and 65 units for intermediate sale.

Further Alterations to the London Plan (FALP) Jan 2014 Table A5.1

Table A5.1 indicative annualised strategic benchmarks to inform local targets and performance indicators for specialist housing for older people 2015 – 2025

London Boroughs	annual target			
	Private Sale	Intermediate Sale	Affordable Rent	Total
Barking and Dagenham	50	15	5	70
Barnet	155	60	10	225
Bexley	90	45	0	135
Brent	105	35	35	175
Bromley	140	65	0	205
Camden	65	20	15	100
City of London	0	0	0	0
Croydon	140	55	0	195
Ealing	135	40	5	180
Enfield	120	50	0	170
Greenwich	65	20	0	85

- 4.7. The FALP benchmarks notes that London Boroughs may wish to provide additional rental units in order to replace stock which is currently unfit for use by older persons.
- 4.8. 170 units of specialist affordable rented accommodation for people with care needs, the majority of which are elderly, have recently been re provided through three new developments at Bromley Common (Regency Court & Crown Court Meadow) and in Penge (Sutherland Court). Additionally there are a further 131 units of accommodation provided within the existing schemes at Norton Court, Durham House, Lubbock House and Apsley Court.

5. **Economic Implications of Specialist Older Persons Accommodation**

- 5.1. The Housing and Ageing Alliance produced a policy paper on the economic implications of housing in an ageing society. The paper highlighted that the combined cost of hospitalisation and social care for hip fractures (most of which are due to falls) is £2 billion a year or £6 million a day. In 2012 Age UK estimated that the cost to could rise to more than £6 billion by 2035, with 140,000 related hospital admissions (almost double the current figure).

Falls - hospital admissions (People aged 65 and over predicted to be admitted to hospital as a result of falls, by age, projected to 2020)

	2012	2014	2016	2018	2020
People aged 65 - 69 predicted to be admitted to hospital as a result of falls	83	88	88	79	44
People aged 70 - 74 predicted to be admitted to hospital as a result of falls	106	111	122	141	144
People aged 75+ predicted to be admitted to hospital as a result of falls	983	1,008	1,019	1,056	1,104
Total popn. aged 65 and over predicted to be admitted to hospital as a result of falls	1,172	1,208	1,230	1,276	1,325

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- 5.2. Good retirement housing allows people to live independent and self-sufficient lives for longer. In addition to design features to minimise falls, specialist accommodation can be designed to address loneliness and isolation and enhance well-being, reducing demand on health and social care services. It highlights a study which estimated that extra care housing can reduce the costs to other services by £550 per resident. The research also suggested that an average scheme of 40 apartments brought investment of around £5 million into older people's housing and other services, providing 50 jobs for the duration of construction and employment of 17 full and part time staff in a typical extra care scheme. "(Housing LIN (2013) Housing in later life: planning ahead for specialist housing for older people).
- 5.3. Housing equity is a key component in paying for care and support in later life. Under the new system of social care provision and funding (legislation laid before Parliament May 13) there is a cap on individual contributions to meeting the cost of social care, and, under a deferred payments arrangement, older people who own their own homes and meet certain criteria are able to make an arrangement whereby they do not have to sell their home, during their lifetime, to pay their care home costs. Instead, the local authority will pay the costs, and recover the money that the person owes, plus interest, at a later date.

6. **Conclusions**

- 6.1. In recent years there has been significant research into the field of specialist accommodation for older people. The conclusions of two, reflecting the general trusts of that research, are picked out below
- 6.2. The University of Reading (Ball 2011) report, which refers to specialist private retirement accommodation for older people as "Owner Occupied Retirement Housing" (OORH), outlines the benefits of such accommodation, namely
- A higher quality of life for residents and families
 - Greater security and convenience
 - Improved independence , health and well being
 - Environmental benefit through reduced energy use and travel
 - Sustains local shopping and other services
 - Whilst delivering considerable social, housing and planning benefits, this is at no cost to the public purse
 - Reduced demand on public sector resources and health services. Residents manage better and spend fewer nights in hospital
 - Release of Equity
 - Contributes to the community
 - Recycles the housing market by freeing up larger homes, boosting the supply in local housing markets.
- 6.3. "A better fit? Creating housing choices for an ageing population" 2012 concluded that:
- There is a need for a significant increase in supply and a greater range of housing that is suitable for older people, including private-rented and owner-occupied housing.

- Overall, there is an imbalance in the overall tenure mix among older person households, with the majority of older people (80%) living in private accommodation, whilst only 30% of specialist older persons housing is available in private tenures (private rented or owner-occupation).
 - There is a growing problem of intergenerational housing inequality with younger households unable to buy, whilst 68% of older person household are underoccupied with two spare rooms.
- 6.4. The reports concluded that the planning system should support the development of housing for older people, factoring older people's housing into local plans, strategies and housing market assessments, while integrating these with health and social care strategies. They note that retirement accommodation is a highly sustainable form of development and that a positive pro-active policy supporting retirement housing would significantly address wider housing and policy implications not just those of the ageing population.

7. Next Steps

- 7.1. The "Local Plan Draft Policies and Designations Consultation" (2014) runs until 24th March 2014. This document sets out a draft policy approach which supports the provision of specialist housing in appropriate locations, seeks to resist the loss of sites currently providing specialist accommodation and encourages appropriately designed redevelopment to enhance provision.
- 7.2. The document also highlights the implications of requirements for affordable provision on the delivery of specialist elderly persons accommodation and suggests that contributions should not be sought for affordable rent in light of the forecast demand for the various tenure types.
- 7.3. Consultation responses from the public, stakeholders and businesses will inform the further development of the policy supported by the South East London Housing Partnership (Bexley, Bromley, Greenwich, Lewisham and Southwark) Strategic Housing Market Assessment (SHMA) and statistical information from the 2011 Census.

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Campaign for Housing in Later Life

<http://housinginlaterlife.co.uk/>

"The role of the planning system in delivering housing choices for older Londoners" (GLA Dec 2012)

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Policy Paper: Economic implications of housing in an ageing society (Housing and Ageing Alliance 2013)

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2011 Census first results; London boroughs' populations by age by sex (July 2012)

<http://data.london.gov.uk/datastorefiles/documents/2011-census-first-results.pdf>

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"Housing in later life – planning ahead for specialist housing for older people" Housing LIN (2013) (appendices guide)

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