

Older Persons Accommodation

2016

Older Persons Accommodation (2016)

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1. Purpose of this Paper

- 1.1. This evidence base paper sets the background to the draft “Specialist and Older Persons Accommodation” policy, as set out in the draft Local Plan November 2016, which supports the provision of specialist housing and resists the loss of sites currently providing specialist accommodation.
- 1.2. The paper sets out the changing demographic background in respect of the ageing population, migratory flows of older people between Bromley and other boroughs, within and beyond London, and the national and regional planning policy response to these changes. The paper highlights the findings of the significant body of research into the range of accommodation types available to older people, the choices they make and the implications for health and the economy, including the impact on the housing market, of specialist older persons accommodation.
- 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 (private rented or owner-occupation) whilst 20% are social renters
 - Of the specialist housing stock around 70% is social rented with 30% in private tenures.
 - 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.
- 1.4. Methods which attempt to project the need for specialist older person's accommodation are explored and assessments of future need are considered against recent trends in delivery.

2. Policy, Guidance and Legislation

National Planning Policy

- 2.1. 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. (Paragraphs 50 and 159)
- 2.2. National Planning Practice Guidance (PPG) recognises that the need to provide housing for older people is critical, noting in the “Methodology: assessing housing need” guidance (paragraph 21), that the projected increase in the number of households aged 65 and over accounts for over half of the new households (Department for Communities and Local Government Household Projections 2013). It advises that Plan makers will need to consider the size, location and quality of dwellings needed in the future for older people in order to allow them to live independently and safely in their own home for as long as possible, or to move to more suitable accommodation if they so wish. Planning appropriately for older person accommodation has been the subject of much research over the last decade.

Regional Planning Policy

The London Plan (March 2016) and Mayoral Housing Supplementary Planning Guidance (SPG) (March 2016)

- 2.3. The London Plan 2016 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.
- 2.4. The London Plan 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 London Plan 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 400 - 500 new bedspaces in care homes.
- 2.5. Annex 5 to The London Plan sets out indicative annualised strategic benchmarks to inform local borough targets based on a 2014 assessment of demand set out in the Mayoral Housing SPG (Paragraph 3.7.11). The SPG acknowledges that for some local planning authorities (the benchmarks suggest a significant amount of their minimum housing supply target should be delivered as older person accommodation. The SPG (paragraph 3.7.13) notes that this is likely to be a reflection of the extent that overall housing need outstrips currently identified capacity, rather than a suggestion that the majority of additional housing should be specialist older person’s accommodation.

- 2.6. The London Mayor's Housing SPG references research on the role of the planning system in delivering housing choice for older Londoners. The research indicates that 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. SPG (2016) advises that Local Planning Authorities (LPAs) should plan positively for specialist provision for older people taking into account London's changing age structure.
- 2.7. 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."*
- 2.8. The Mayor's Housing Strategy "Homes for London: The London Housing Strategy" GLA June 2014 seeks to encourage downsizing by improving the choice and quality of such products.

The Care Act (2014)

- 2.9. The Care Act places a duty on Local Authorities in respect of promoting the efficient and effective operation of a market in services for meeting care and support needs with a view to ensuring that any person in its area wishing to access services in the market.
- has a variety of providers to choose from who (taken together) provide a variety of high quality services;
 - has sufficient information to make an informed decision about how to meet the needs in question.
- 2.10. The supporting Care Act Factsheet 1 (April 2016) deals with general responsibilities of local authorities: prevention, information and advice, and shaping the market of care and support services and advises that
- "The Care Act requires local authorities to help develop a market that delivers a wide range of sustainable high-quality care and support services, that will be available to their communities."*

HAPPI (the Housing our Ageing Population: Panel for Innovation) and the All Party Parliamentary Group (APPG) on Housing and Care for Older People

- 2.11. In 2009 HAPPI reported to Government on their findings from older persons accommodations case studies and made recommendations details of design features and provide some information about how the schemes are integrated with the wider community.

2.12. The APPG is a cross-party group of MPs and Peers which raises the profile of housing and care for older people amongst Parliamentarians. In 2012 the APPG held an inquiry to consider progress towards the adoption of the recommendations and the design criteria set out in HAPPI. Their report HAPPI 2 (2012), “Housing our Ageing Population :Plan for Implementation”, underlined the economic and social advantages of a house-building programme for “downsizers” and made a series of suggestions for policy-makers and practitioners.

2.13. In 2015, the APPG held a further inquiry, publishing its findings in June 2016, 'Housing our Ageing Population: Positive Ideas' (or HAPPI 3). The report emphasised that Councils need to ensure their Local Plan gives the necessary priority to older people’s housing needs, recommending

- Council/ALMO house-building and Council support for housing association development for older tenants which can free up affordable, under-occupied family homes and
- the exemption of retirement housing from the requirement to build Starter Homes - or to pay a commuted sum in lieu, and
- a recognition that the Community Infrastructure Levy must not threaten the viability of such developments.

3. **Bromley's Older People**

- 3.1. Bromley has the largest elderly population in of all London boroughs with the 2011 census showing approximately 5% of Bromley's population over 80 years of age, compared with 3% for London as a whole.

Table 1 : 2011 Census : Five Year Age Bands

	Bromley :			London :		
	Total	Males	Females	Total	Males	Females
All Ages	309,392	148,588	160,804	8,173,941	4,033,289	4,140,652
Age 0 to 4	20,095	10,228	9,867	591,495	302,540	288,955
Age 5 to 9	18,061	9,123	8,938	482,809	245,848	236,961
Age 10 to 15	22,430	11,571	10,859	550,464	281,883	268,581
Age 16 to 19	14,094	7,180	6,914	378,060	191,281	186,779
Age 20 to 24	16,119	7,826	8,293	629,972	310,403	319,569
Age 25 to 29	17,887	8,651	9,236	832,966	412,188	420,778
Age 30 to 34	21,064	10,193	10,871	796,888	403,225	393,663
Age 35 to 39	22,214	10,565	11,649	664,046	336,264	327,782
Age 40 to 44	24,854	12,037	12,817	610,020	304,686	305,334
Age 45 to 49	24,312	11,657	12,655	556,656	273,747	282,909
Age 50 to 54	20,684	10,177	10,507	461,290	228,084	233,206
Age 55 to 59	17,049	8,260	8,789	371,936	181,543	190,393
Age 60 to 64	18,492	8,807	9,685	342,590	165,592	176,998
Age 65 to 69	14,177	6,732	7,445	256,772	121,114	135,658
Age 70 to 74	11,593	5,217	6,376	216,286	100,729	115,557
Age 75 to 79	10,224	4,516	5,708	176,831	79,533	97,298
Age 80 or over	16,043	5,848	10,195	254,860	94,629	160,231

Source: Census 2011 Table CT0561

- 3.2. The POPPI (Projecting Older People Population Information) System was developed by the Institute of Public Care (IPC) for use by local authority planners and commissioners of social care provision in England. It is a programme designed to help explore the possible impact that demography and certain conditions may have on populations aged 65 and over.
- 3.3. The POPPI statistics indicate that in 2015 Bromley was projected to account for 5.75% of over 65's in London , and 6.4% of London's 85 years+ population. By 2030 the numbers of older people in Bromley show a marked increase in both age ranges, but a marginal fall in the percentage of London's elderly population as some other borough's older populations expand at a slightly greater rate (albeit from a lower base figure).

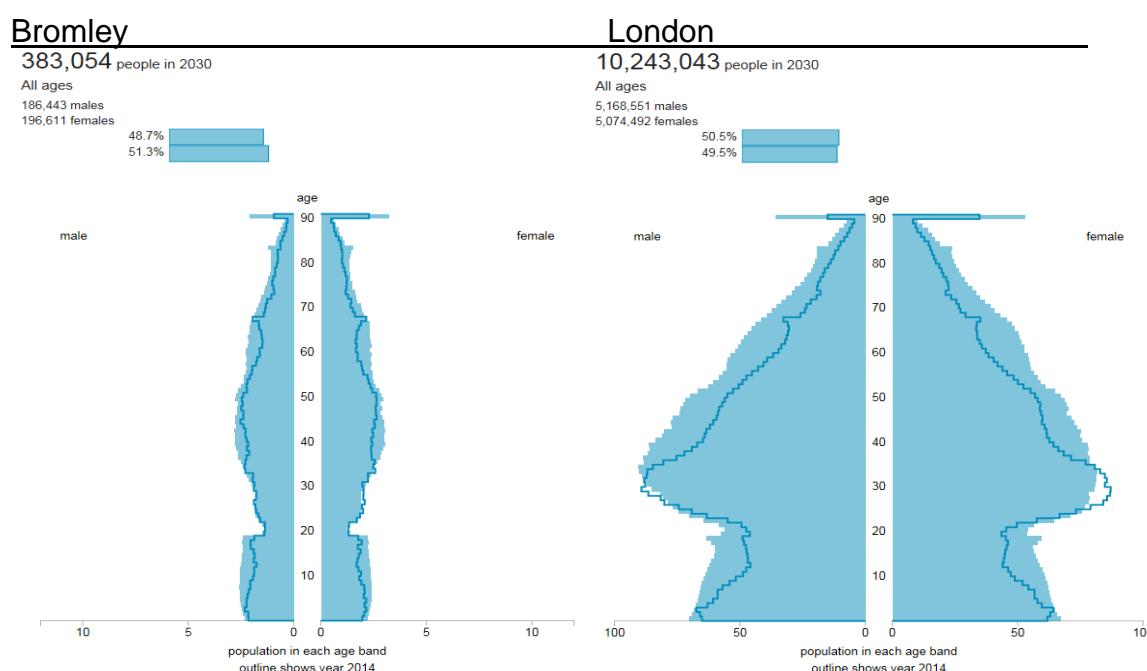
Table 2 : Projected over 65's and over 85's in Bromley and London in 2015 and 2030

	2015	2015 (%)	2030	2030(%)
Bromley (65yrs +)	57,200	5.75	75,300	5.3
London (65yrs +)	994,200	100	1,409,000	100
Bromley (85yrs +)	8,700	6.4	12,900	6
London (85yrs +)	136,100	100	215,100	100

POPPI Crown copyright 2014. Figures may not sum due to rounding

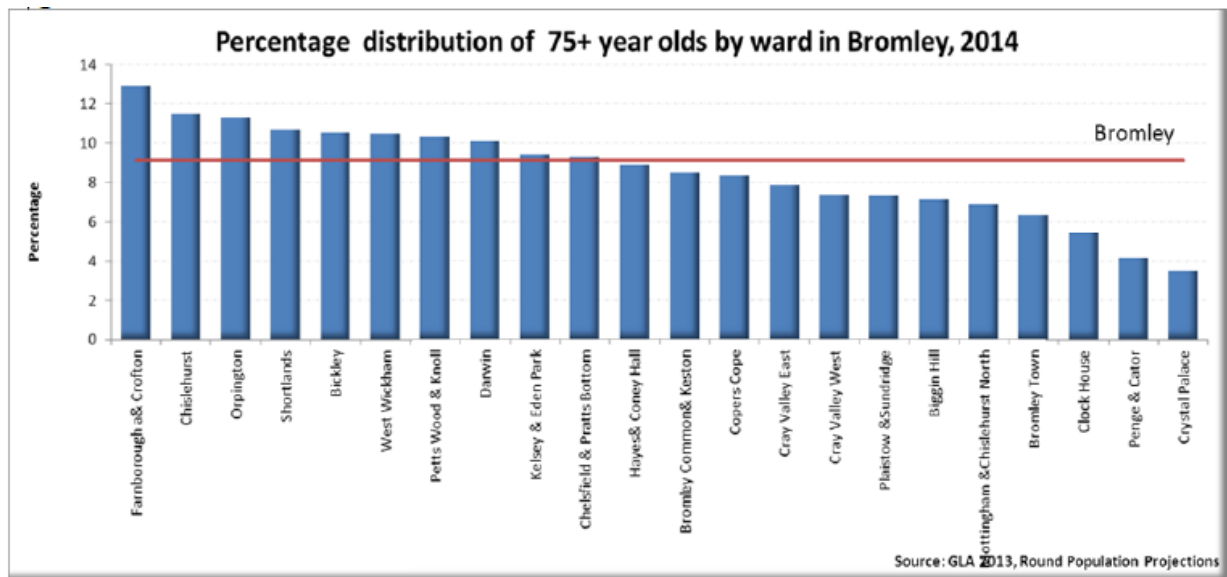
- 3.4. Office of National Statistics population pyramids below, illustrate the contrast with London's population. (Outline shows 2014, shading shows 2030). The London population pyramid has a distinctive triangle shape highlighting the significant population cohorts in their late 20's and early 30's, 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.

Table 3 : Population Pyramids (GLA Data Store)



- 3.5. In addition to the large retirement population recorded in the 2011 census Bromley's 2014 population pyramid illustrates a significant cohort who subsequently reached retirement age, now in their mid to late 60's. The 2014 pyramid also shows a further significant and sustained bulge of those approaching and just passing 50 years of age; hence the proportion of older people in Bromley, relative to the overall Borough population is anticipated to continue to increase over the plan period as these cohorts approach their mid 60's towards the end of the Local Plan period.
- 3.6. With regard to the 80+ age group both the proportion and number of people in this age group rise steadily over the Local Plan period due to improved health outcomes for older people. The 2014 spike in population aged 67, born immediately after the end of World War 2 are illustrated in the population pyramid 2030 projection (shaded area) as 83 years of age at the end of the Local Plan period.
- 3.7. Bromley's Joint Strategic Needs Assessment (JSNA) 2014 illustrates the distribution of people over 75 years of age by ward (based on the GLA 2013 round population projections) and highlights the percentage distribution of those 75 years+ exceeding the general borough average, in the wards of Darwin, Petts Wood & Knoll, Bickley, Shortlands, Orpington, Chislehurst and most notably Farnborough & Crofton ward, which also had the highest actual number of those 75 years+ (almost 2,000).

Table 4 : Percentage distribution of 75+ year olds by ward (2014)



Source: Bromley JSNA 2014

Table 5 : Number and Percentage of Residents 75years + by Ward

	75+ years	
	No	%
Bickley	1626	10.5
Biggin Hill	732	7.1
Bromley Common& Keston	1374	8.5
Bromley Town	1166	6.4
Chelsfield & Pratts Bottom	1381	9.3
Chislehurst	1767	11.5
Clock House	876	5.5
Copers Cope	1334	8.4
Cray Valley East	1246	7.9
Cray Valley West	1270	7.4
Crystal Palace	451	3.5
Darwin	538	10.1
Farnborough a& Crofton	1926	12.9
Hayes& Coney Hall	1453	8.9
Kelsey & Eden Park	1536	9.4
Mottingham & Chislehurst North	708	6.9
Orpington	1779	11.3
Penge & Cator	739	4.1
Petts Wood & Knoll	1443	10.3
Plaiestow & Sundridge	1142	7.3
Shortlands	1083	10.7
West Wickham	1601	10.5
Bromley	29185	9.1

Source: Bromley JSNA 2014

Migration of over 65's in and out of Bromley

3.8. The census provides information regarding moves into and out of the Borough.

Table 6 : 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

Census 2011 (Table 2b: data rounded therefore a margin of deviation).

- 3.9. The table of movements (Table 6) 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. The net inflows come chiefly from inner London Boroughs and the net outflows to boroughs beyond London and across the country.

Older People Living Alone

- 3.10. Bromley has a significant number of elderly people living in their own homes.

65 years +

- 3.11. The POPPI System indicates that the proportion of the population aged 65+years predicted to live alone is broadly similar, just over a third, across Bromley, neighbouring boroughs and London generally. However, given the size of the retired age group in Bromley the actual number of people over 65years living alone in Bromley is over 3,000 more than Croydon and significantly higher, 5,000 – 10,000 more older people living alone, than other neighbouring London Boroughs.
- 3.12. The predictions for 2030 remain fairly consistent in terms of proportions of each boroughs populations, which for Bromley means an increase in the number of people 65years + living alone of almost 7,000. Notably Croydon's figure increases by almost 9,000 due to the scale of its current pre-retirement population.

Table 7 : 65 years + Living Alone

Borough	2015 Popn. 65yrs +	2015 65+ predicted to live alone		2030 Popn. 65yrs +	2030 65+ predicted to live alone	
		Number	%		Number	%
Bromley	57,000	21,206	37.2	75,300	28,153	37.4
Bexley	40,100	15,054	37.5	52,500	19,639	37.4
Croydon	49,400	18,057	36.6	73,500	26,889	36.6
Greenwich	28,200	10,341	36.7	40,000	14,468	36.2
Lewisham	27,700	10,331	37.7	40,900	14,505	35.5
LONDON	994,200	364,594	36.7	1,409,000	515,716	36.6

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75 years +

- 3.13. The POPPI system also produces information for the 75 years + age group. Across London almost half of those over 75 years of age live alone. The proportion increases for women with 61% of women over 75 years living alone. In Bromley the number of people 75 yrs + living alone, at approximately 13,500, exceeds neighbouring of Croydon and Bexley by several thousands and is more than double the number of people over 75 yrs living alone in Greenwich and Lewisham.

- 3.14. By 2030 the number of people over 75 yrs living alone in Bromley is predicted to have increased by over 5,000.

Table 8 : Over 75 years Living Alone

Borough	2015 75+ predicted to live alone	2030 75+ predicted to live alone
Bromley	13,656	18,813
Bexley	9,884	13,019
Croydon	11,377	17,029
Greenwich	6,431	8,908
Lewisham	6,621	8,528

POPPI Crown copyright 2014. Figures may not sum due to rounding

Increasing Limitations on Activity

- 3.15. The Mayoral Housing SPG (March 2016) 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. The projections below indicate the numbers of people whose day to day activities are “limited a lot” increasing by over a third over the Local Plan period from 11,175 to 15,278. Over the same period (up to 2030) the number of people over 85yrs whose day-to-day activities are limited a lot increases by approximately 50% from 3,614 to 5,401.

Table 9 : Projections for Limiting long term illness in Bromley

	2015	2020	2025	2030
People aged 65-74 whose day-to-day activities are limited a lot	3,364	3,499	3,545	4,177
People aged 75-84 whose day-to-day activities are limited a lot	4,197	4,466	5,386	5,701
People aged 85 whose day-to-day activities are limited a lot	3,614	4,071	4,611	5,401
Total population aged 65 with a limiting long term illness whose day-to-day activities are limited a lot	11,175	12,037	13,545	15,278

POPPI Crown copyright 2014. Figures may not sum due to rounding

- 3.16. The South East London Strategic Housing Market Assessment (SHMA) 2014 indicates that “reflecting the age profile of the population, Bromley has a higher than average [relative to the sub regional average] projected increase in the number of older people with mobility difficulties (14%)”.

4. **Accommodation Choices**

- 4.1. Given the number of older households, the significant numbers of elderly people currently living alone and the projected increases, the Mayoral Housing SPG 2016 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.

Models of accommodation

- 4.2. The spectrum of older person's accommodation is described by a range of terminology. The London Plan uses the term 'Specialist Accommodation for Older People' as the overarching description and this is broken down into three categories of accommodation in the Housing SPG.

- Sheltered Accommodation comprising self-contained accommodation specifically designed and managed for older people in need of no or a low level of support, some forms also known as 'retirement housing'. The Elderly Accommodation Council (EAC) refers to this type of provision as 'Housing with Support', providing support to residents to help them live independently.
- Extra Care accommodation (also known as close care, assisted living, very sheltered or continuing care housing) The Housing SPG indicates that these comprise self-contained accommodation and associated facilities designed and managed to meet the needs and aspirations of people who by reason of age or vulnerability have an existing or foreseeable physical, sensory, cognitive or mental health impairment. Extra care provision, where support services may be provided round the clock provide improved opportunities particularly for the physically frail, and for people with dementia, reducing the demand for residential care, The EAC's 'Housing with Care' definition would also come within this category of provision.
- Residential/ Nursing Care (including end of life/ hospice care and dementia care) comprising nursing or residential care homes providing non self-contained residential accommodation for people who by reason of age or illness have physical, sensory or mental impairment, including dementia.

Existing Stock of Elderly Persons Accommodation in Bromley

- 4.3. The Elderly Accommodation Council website indicates almost 3,800 units of specialist elderly accommodation are available in the London Borough of Bromley, and approximately 1,500 beds in care homes.

Specialist Housing Units

- 4.4. The proportion of specialist housing in Bromley is comparable with neighbouring boroughs in respect of their populations aged 65years +. However the significant size of Bromley's 85years+ population is such that Bromley's provision is lower

than most of its neighbouring London boroughs. Notably Lewisham has a markedly greater provision per 1,000 residents.

Table 10 : Specialist Housing Units Per Age Group

Council	2015 Popn 65+	2015 Popn 85+	Total Units	units per 1000 people over 65+	units per 1000 people over 85+ *
Bromley	57,200	8,700	3789	66	436
Bexley	40,100	5,900	2443	61	414
Croydon	49,400	6,600	3085	62	467
Greenwich	28,200	3,800	2104	75	554
Lewisham	27,700	3,800	3213	116	846

(Census data source: POPPI, Accommodation data source: Elderly Accommodation Council 2016)

*assuming all available to 85+ age group only

Housing Tenure of Older Households and Specialist Older Persons Accommodation

- 4.5. The EAC research indicates that in Bromley two thirds of the specialist housing stock is subsidised units (65% for rent and 1% shared ownership) with the remaining one third, being available for private sale. This reflects the national picture, with around 70% social rented and 30% in private tenures (private rented or owner-occupation).

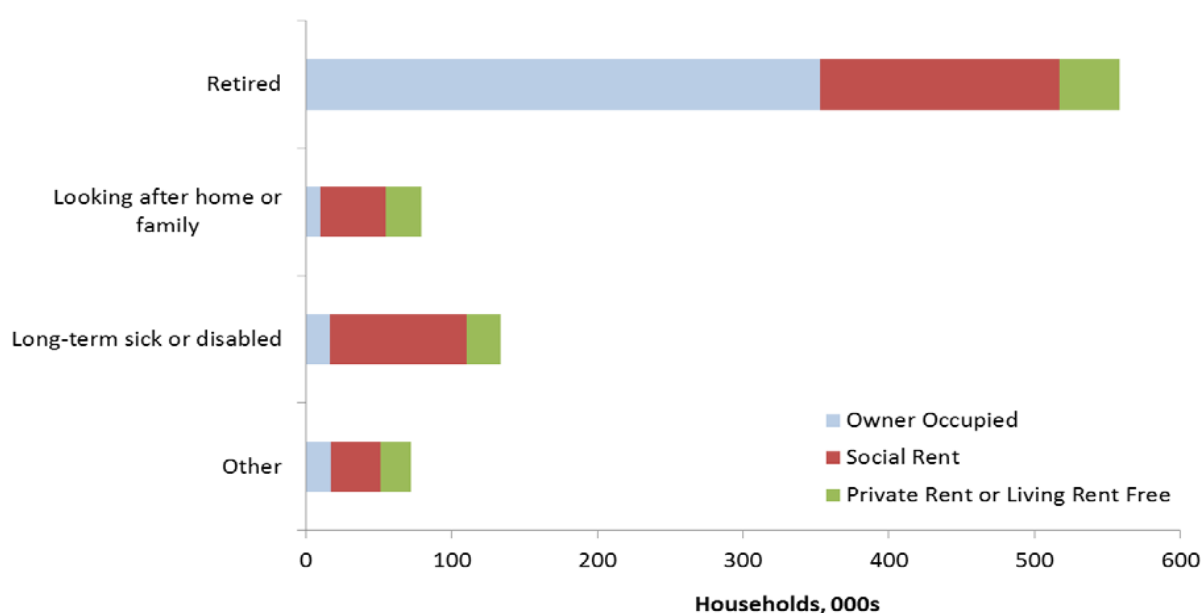
Table 11 : Specialist Older Persons Accommodation in Bromley (EAC 2016)

Total Units	Units for Rent		Units for Sale		Shared Ownership Units	
3789	2478	65%	1274	34%	37	1%

(Accommodation data source: Elderly Accommodation Council 2016)

- 4.6. However, the Bromley Household Survey (2009) indicates that generally around two thirds of older households are owner occupiers. There is an imbalance between the tenure of older households with those in general housing (predominantly owner occupiers) and those living in specialist older person's accommodation (predominantly social rented).

Table 12 : Tenure of Retired (over 65) Households



(Source: Bromley Household Survey 2009)

- 4.7. The Mayoral SPG promotes housing choice in the market, however the specialist market accommodation for older people of less than 1,300 units equates to marginally over 1% of all dwellings in Bromley's private dwelling stock (over 120,000 private dwellings).
- 4.8. The 2012 Shelter study "A better fit? Creating housing choices for an ageing population" noted the 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).
- 4.9. Additionally the report highlights what it calls a growing problem of intergenerational housing inequality with younger households unable to buy, whilst 68% of older person household are under occupied with at least two spare bedrooms.

Nature of Support / Care

Older persons housing with no / low support (Sheltered / Retirement Housing)

- 4.10. Bromley has almost 3,500 units, of older persons housing with no / low support. For the population 65years+ this equates to 60 units per 1,000 people, comparable with neighbouring London boroughs except for Lewisham who have a significantly greater provision.
- 4.11. Looking solely at the older age group 85years+ the provision per 1000 people is lower in Bromley than all neighbouring London Boroughs.

Table : 13 Housing with no / low support - Mayoral 'sheltered' / EAC 'Housing with support'

Council	2015 Popn 65+	2015 Popn 85+	Total no / low support (Mayoral 'sheltered' / EAC 'Housing with support')	units per 1000 people over 65+	units per 1000 people over 85+*
Bromley	57,200	8,700	3,458	60	397
Bexley	40,100	5,900	2,392	60	405
Croydon	49,400	6,600	2,689	54	407
Greenwich	28,200	3,800	1,944	69	512
Lewisham	27,700	3,800	3,079	111	810

(Sources: POPPI and EAC data 2016)

*assuming all available to 85+ age group only

Housing with Care (Extra Care / Very sheltered / Assisted living housing)

- 4.12. Bromley has some 330 “Housing with Care” units, which provide more significant support to residents. The provision of such units is relatively low across Bromley and neighbouring boroughs, notably Bexley has very few units, relative to its population. Conversely, Croydon has a markedly greater provision relative to its population with 60 units per 1000 residents 85years +.

Table 14 : Housing with Care - Mayoral 'Extra Care' / EAC 'Housing with Care'

Council	2015 Popn 65+	2015 Popn 85+	Total with care (Mayoral 'Extra Care' / EAC 'Housing with Care')	units per 1000 people over 65+	units per 1000 people over 85+
Bromley	57,200	8,700	330	6	38
Bexley	40,100	5,900	50	1	8
Croydon	49,400	6,600	396	8	60
Greenwich	28,200	3,800	161	6	42
Lewisham	27,700	3,800	135	5	36

(Sources: POPPI and EAC data 2016)

*assuming all available to 85+ age group only

Care Homes

- 4.13. The POPPI July 2014 update data indicates that whilst Bromley has the largest care home population this is not disproportionate given the size of its older population.
- 4.14. Residential care homes in Bromley are all provided by the private sector, although in June 2016, Bromley Council funded 250 people aged 65+ in residential care

beds. The data suggests there are currently fewer care beds available in Bromley than there are in neighbouring boroughs, with the exception of Lewisham and there are significantly fewer than in Croydon.

Table 15 Care Beds by Age Group

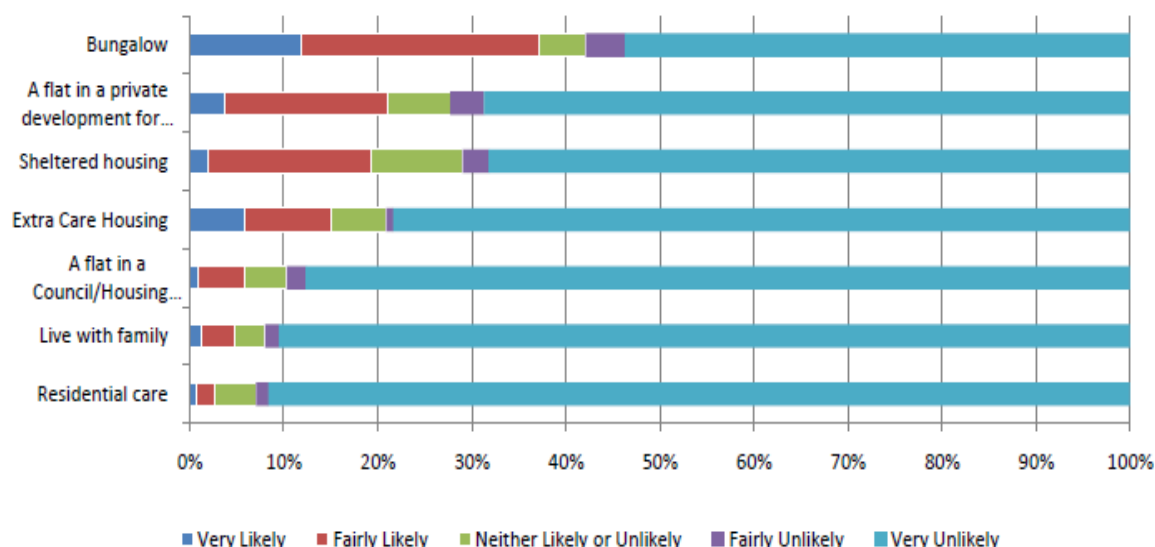
Council	Beds Care	Beds Nursing	Beds Total	2015 Popn 65+ (POPPI / Census)	beds per 1000 people over 65+	2015 Popn 85+ (POPPI / Census)	beds per 1000 people over 85+*
Bromley	512	1014	1526	57,200	27	8,700	175
Bexley	627	612	1239	40,100	31	5,900	210
Croydon	548	1404	1952	49,400	40	6,600	296
Greenwich	131	726	857	28,200	30	3,800	226
Lewisham	146	481	627	27,700	23	3,800	165

(Sources: POPPI and EAC data 2016) *assuming all available to 85+ age group only

Likelihood of moving

- 4.15. 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).
- 4.16. 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.

Table 16 : Likelihood of Considering Types of Accommodation as People Become Older (60+)



(Source: Bromley Household Survey 2009)

4.17.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

Planning Use Classes

4.18.As identified above specialised accommodation for older people covers a spectrum of provision which covers two separate planning use classes. Class C3 “Dwelling houses” and Class C2 “Residential Institutions” which the Use Classes Order defines as *“Use for the provision of residential accommodation and care to people in need of care (other than a use within class C3 (dwelling houses))”*.

4.19.The London Plan SPG notes that *“consultants suggest that the most robust way of distinguishing between the two is the ‘front door’ test – if the unit of accommodation has its own front door then it is usually C3, if not it is C2. However, ...some Extra Care schemes where units may have their own front door but functionally are effectively C2.”*

4.20.The desire for a C2 classification may relate to the differing s106 requirements. S106 requirements impact on scheme viability, given the development costs are usually significantly higher than for general needs housing, the SPG suggests that such proposals may require ‘bespoke’ viability assessments (and, if necessary their independent validation) rather than application of standard Financial Viability Assessments.

4.21.Importantly the SPG advises that providing the proposal is justified by identified need and addresses wider policy considerations, the planning system should not be used to restrict development of either – this is an evolving market and provision should not be constrained by what, in need terms, might appear to be an arbitrary and perhaps dated planning distinction.

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

- 5.1. The Housing and Ageing Alliance produced a policy paper “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).

Table 17 : Falls - hospital admissions (People aged 65 and over predicted to be admitted to hospital as a result of falls, by age, projected to 2020)

People predicted to be admitted to hospital as a result of falls	2015	2020	2030
aged 65 - 69	89	79	108
aged 70 - 74	116	146	150
aged 75+	1,008	1,093	1,413
aged 65+	1,214	1,318	1,671

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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.
- 5.3. 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.
- 5.4. September 2011 the International Longevity Centre published research entitled ‘Establishing the Extra in Extra Care’ which compared, over a 15 year period, the outcomes of extra care housing residents with a matched community sample of people receiving domiciliary care. The research indicated a potential saving of up to £512 from hospital budgets per person per year in some cases.

5.5. A further report “Housing in later life: planning ahead for specialist housing for older people” (Housing LIN (2012) which suggested that:

- On average, each older person living in specialist housing reduces costs to other services by £550.
- 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.

5.6. More recently The Aston Research Centre for Healthy Ageing (ARCHA) at Aston University undertook research with The Extra Care Charitable Trust on their Extra Care model. The following findings were published in 2015

- NHS costs reduce by 38% - over a 12 month period, total NHS costs (including GP visits, practice and district nurse visits and hospital appointments and admissions)
- Unplanned hospital stays reduced from 8-14 days to 1-2 days
- 46% reduction in routine and regular GP visits - whilst drop-ins to the Well-being Service increased.
- Significant cost savings on social care – for lower level social care a saving of £1,222 per person per year (17.8% less) than the same level of care in the wider community (on average, with variation by local authority) for higher level social care £4,556 saving (26% less) per person per year.
- 19% of residents who are pre-frail at baseline return to resilient state 18 months later
- 14.8% reduction in depressive symptoms in 18 months - a 64.3% reduction in people with significant clinical level depression over the same period. (Residents with mobility issues show the greatest reduction in depressive symptoms).
- 10.1% improvement in autobiographical memory in 18 months –
- Differences in self-perceived health which are initially related to socio-economic status removed
- Age has less impact on self-perceived ability to cope.

5.7. Shelter’s 2012 study “A better fit? Creating housing choices for an ageing population” 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 under occupied with two spare rooms.

6. **Population Projections**

- 6.1. The South East London Strategic Housing Market Assessment (SHMA) 2014, assesses current and future housing needs and requirements of the boroughs of Bexley, Bromley, Greenwich, Lewisham and Southwark. [Note this grouping of boroughs excludes the neighbouring borough of Croydon and includes the inner London Borough of Southwark].

65 Years +

- 6.2. The table below looks at the projected increases in the populations of the SHMA boroughs. Notably Bromley has a significantly greater predicted increase, and accounts for over a quarter of the predicted increase in the SHMA area.

Table 18 : Increase in the population over 65 years by 2023

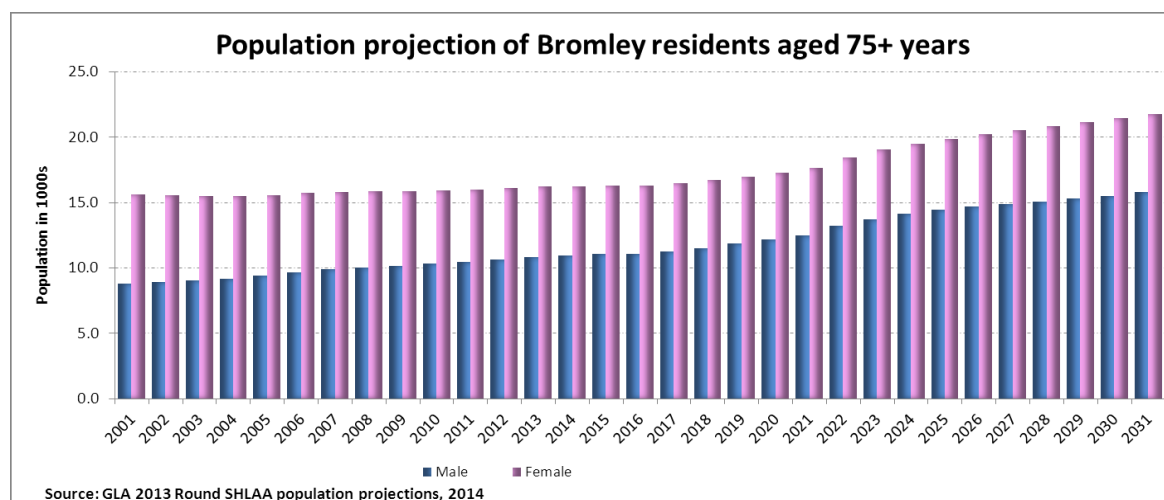
Area	Increase in the population 65+ by 2023	% of SHMA area increase
Bromley	22,500	28
Greenwich	16,000	20
Bexley	15,000	18
Lewisham	14,200	17
Southwark	14,000	17
SHMA Area	81,700	100

(Based on SHMA 2014 - Source GLA Projections)

75years+

- 6.3. Bromley's Joint Strategic Needs Assessment (JSNA) 2014 illustrates the projected increase in residents over 75 years to 2031 (based on the GLA 2013 round population projections).
- 6.4. As the JSNA graph indicates, whilst fairly stable, there has been a very gentle increase in the 75+ population over the last decade. However, this increase is anticipated to rise more significantly from 2018/19 for the remainder of the Local Plan period.

Table 19 : Population projection of Bromley Residents aged 75yrs +



85 Years +

- 6.5. The South East London Strategic Housing Market Assessment (SHMA) 2014 indicates that the proportionate increase in the over 85s is particularly significant in Bromley, Bexley, and Greenwich and draws particular attention to the increase in Bromley of 5,250 households with at least one member aged 85 or over. The rate of growth is higher than for the SHMA area as a whole and the Bromley increase represents well over a third of the increase in the whole SHMA area (14,913).

Table 20 : Projections of households with at least one member aged 85 or over

Area	2012	2032	Increase	%increase
Bromley	6,127	11,377	5,250	86
Greenwich	2,488	4,705	2,217	89
Bexley	4,165	7,978	3,813	92
Lewisham	2,857	4,778	1,921	67
Southwark	2,342	4,054	1,712	73
SHMA Area	17,979	32,892	14,913	83

(Source: SHMA 2014 – GLA Household projections 2013, Central trend)

7. **Future Requirements for Specialist Housing**

7.1. The 2014 SHMA commented that no single model has been entirely accepted as definitively assessing future need. The SHMA taking Elderly Accommodation Council 2012 data as its baseline modelled the future need for specialist housing for older people using three main approaches. The modelling focusses on housing units and did not attempt to model for accommodation in residential / nursing care homes.

- Rolling out current patterns - Estimating the requirement for additional specialist accommodation up to 2032 is to assume that the current proportion (8%) of households aged over 65 who live in specialist accommodation will continue to apply.
- GLA modelling of demand in London - Updated research based on the assumption that 15-20% of over 65 year olds would move if suitable accommodation existed.
- Housing LIN SHOP tool - Housing Learning and Information Network (LIN) has developed a modelling tool (SHOP Strategic Housing for Older People Analysis Tool) based on combining demographic data, projections and supply to assess requirements for different types of housing for older people. (Note uses ONS rather than GLA population projections.)

Table 21 : Modelling Future Requirements

Model	Requirement within the SHMA area
Rolling out current patterns	3,896 (up to 2032)
GLA modelling of demand in London	Between 2,743 and 6,662 additional (between 2014 and 2025)
Housing LIN SHOP tool *	8,552 (between 2012 and 2030)

*Housing LIN SHOP tool requirement for over 75yrs (other models relate to 65 years+)

London Plan (2016) Annex Five and London Plan Housing SPG (2016)

7.2. The London Plan Housing SPG (2016) refers, in para 3.7.11, to an updated review which suggests the potential demand for approximately 3,900 new specialist units a year, broadly broken down into 2,620 private units, 955 for intermediate sale (shared ownership, shared equity or leasehold for the elderly type schemes) and up to 325 new affordable rental units (although additional rental units may be required to replace stock that is unfit for use by older people).

7.3. The London Plan 2016 breaks these requirements down into “indicative annualised strategic benchmarks to inform local targets for specialist housing for older people” (Table A5.1 below). The benchmark for Bromley is 205 specialist housing units per annum (comprising 140 units for private sale and 65 units for intermediate sale, but none for affordable rent).

The London Plan (March 2016)Table 22 : (London Plan 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 indicative requirement benchmarks			
	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
Hackney	25	10	20	55
Hammersmith and Fulham	45	15	0	60
Haringey	80	20	0	100
Harrow	110	40	0	150
Havering	135	50	0	185
Hillingdon	115	40	0	155
Hounslow	95	30	20	145
Islington	30	10	50	90
Kensington and Chelsea	60	20	20	100
Kingston upon Thames	70	25	0	95
Lambeth	55	15	5	75
Lewisham	65	25	25	115
Merton	80	30	0	110
Newham	55	15	5	75
Redbridge	75	45	0	120
Richmond upon Thames	105	30	0	135
Southwark	45	15	55	115
Sutton	70	35	0	105
Tower Hamlets	25	10	35	70
Waltham Forest	65	25	0	90
Wandsworth	80	25	0	105
Westminster	70	20	20	110
LONDON TOTAL	2620	955	325	3900
Note: London Boroughs may wish to provide additional rental units in order to replace stock which is currently unfit for use by older persons				

- 7.4. The SPG acknowledges that for some Local planning authorities the benchmarks suggest a significant amount of their minimum housing supply should be delivered as older person accommodation. It advises that

“this is likely to be a reflection of the extent that overall need outstrips currently identified capacity, rather than a suggestion that the majority of additional housing should be specialist older person’s accommodation. Local/ sub regional needs assessments will be able to analyse this in more detail.”

- 7.5. There remains a potential growth in demand for both nursing and residential “Elderly Mentally Infirm” (EMI) provision.

Care Homes

- 7.6. The London Plan Housing SPG, which supported the indicative annualised strategic benchmarks for 3900 units of specialist older persons housing per annum. The SPG also quotes the independent reviews findings in respect of bedspaces in care homes, noting that *“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 per annum in care homes.”*
- 7.7. On a purely proportional basis, given that between 2015 and 2030 Bromley is predicted to account for between 5 – 6% of London’s over 65’s and over 6% of London’s over 85’s it would be not unreasonable to assume in the region of 25 – 30 care bed spaces per annum for Bromley.

Recent Changes in Provision in Bromley

- 7.8. During 2011 / 12 Bromley Council (working with Hanover) sought to move away from a reliance on nursing and care home provision, replacing existing provision (of 6 ageing care homes) with three new Extra Care schemes, Regency Court, Sutherland Court and Crown Meadow. This reprovision anticipated a reduction in residential care beds, instead providing 170 extra care units, however the new extra care provision appears to be absorbing some of the increase in demand for intensive care and support arising from the needs of the ageing population. Last year an extra care scheme in Orpington was closed, reducing provision by 30 extra care beds.
- 7.9. Since the publication of the NPPF 2012 redevelopments relating to specialist older persons accommodation permitted on six sites, as set out in Tables 23 and 24. Once those currently under construction are completed this will have effectively produced a net gain of 115 specialist older persons units, (145 gained and 30 lost) and 34 care home beds. (75 new beds will be available from spring next year, although, 41 beds were lost with the closure of St Benedict’s Care Home in 2017).

Table 23 : Schemes opened / closed since 2012

Schemes	Nature of older person provision	Gain / Loss	Year
Atkins Lodge – former offices (Orpington)	ECH	55	2014
Faulkner House (Chislehurst) vacant former care home	ECH	42	2015
Lubbock House (Orpington)	ECH	(-30)	2015
St Benedict's (Beckenham)	Care Home	(-41)	2016
Total Net Gain		26	

(excluding the final openings / closures related to previously approved reprovision of Council care homes)

7.10. The currently permitted schemes suggest a net increase over the 5 year period 2013 – 2017

- 23 units of specialist housing for older people per annum, and
- 7 care beds per annum

Table 24 : Permitted Schemes Under Construction

Scheme / site	Nature of older person provision	Gain / Loss	Expected date
Octopus Healthcare (Gray's Farm)	Care Home (C2) (former industrial units)	75	spring 2017
Ortus Homes, Albemarle Rd	Retirement flats	16	spring 2017
1- 9 Church Road, Biggin Hill	Retirement flats (C3)	32	Winter 2017
Total Net Gain		123	

8. Conclusions

- 8.1. Bromley has the largest elderly population of all London boroughs and that is set to continue to grow over the Local Plan period.
- 8.2. New developments of specialist older persons accommodation in Bromley are currently well below the London Plan “indicative annualised strategic benchmark to inform local targets” figure of 205 new private / intermediate units per year. Whilst there is no London Plan borough figure for care beds, the provision of additional bed spaces per year over the last 5 years has been low relative to Bromley’s older person’s population.
- 8.3. National Planning Practice Guidance highlights that “Supporting independent living can help to reduce the costs to health and social services, and providing more options for older people to move could also free up houses that are under occupied”
- 8.4. The researches into specialist accommodation for older people highlight the benefits to health and the economic savings that such provision can produce.
- 8.5. The range of studies undertaken to support planning policies nationally and regionally and locally point to the conclusion 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 suggest 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.

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