Housing LIN
Connecting people, ideas and resources

Assessment of need for housing and accommodation for older people in Epping Forest District to 2037

For Epping Forest District Council

July 2023

Housing Learning & Improvement Network

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About the Housing LIN

The Housing LIN is the leading independent knowledge and information sharing hub for the older person's housing sector in the UK. It is a network for sharing evidence, learning, contemporary practice and facilitating professional events.

https://www.housinglin.org.uk/Topics/browse/HousingOlderPeople/

The Housing LIN has been instrumental over the last 20 years in shaping older person's housing policy in the UK by providing evidence-based research and guidance to policymakers, local authorities, housing providers and others.

Formerly part of the Department of Health's Integrated Care Team between 2002 and 2011, the Housing LIN was responsible for managing the Government's extra care housing capital funding programme, and has continued to contribute significantly in terms of influencing national policy development, local commissioning and investment strategies and sharing examples of good practice to support wider sector learning and improvement. The Housing LIN has continued in this role as an independent organisation since 2011. For example, the Housing LIN's CEO, Jeremy Porteus, is a member of the Government's newly established Older People's Housing Taskforce.

The Housing LIN is unique in providing the UK's leading knowledge and information site for housing, care and support options for older people (and for other people with care and support needs) as well as using this evidence to provide advisory services to the housing and support sector.

The Housing LIN since 2017 has undertaken for local authorities, regional bodies, and housing providers, over 200 assessments of need for housing and accommodation for older people and other people with care/support needs, drawing on the evidence it has developed and curated.

In addition, the Housing LIN has conducted reviews of over 150 sheltered Housing, retirement housing and extra care housing schemes for a range of social, chartable and private providers. Our approach to estimating need for housing or older persons is strongly influenced by our real world understanding of the challenges and issues faced by providers of specialist housing for older people, such as slow 'fill rates' for new specialist housing schemes for older people.

The Housing LIN has a long track record in relation to undertaking assessments of housing for older persons; we have been involved in developing models for assessing need for housing for older people since 2011. We developed the original 'SHOP@' model (which is referenced in the Government's guidance for local authorities, *Housing for older and disabled people*), and we're familiar with other documents that contain suggested models for estimating need for housing for older people, for example we co-authored and published *Housing in Later Life* in 2012.

1. Introduction

1.01 EFDC has commissioned the Housing Learning and Improvement Network (Housing LIN)[1] to undertake an assessment of the housing and accommodation needs of older people, which includes the need for different types of housing and accommodation suited to older persons.

1.02 It is an updated version of an assessment of need for housing and accommodation for older people in Epping Forest District previously prepared in 2021, which supported the adopted Local Plan and is intended to be a material consideration in determining planning applications and support the Council's Housing Strategy.

1.03 This report includes:

- Demographic evidence relating to the local older population.
- Housing, health and social care, and socioeconomic factors in relation to the local older population.
- Evidence in relation to the current supply of specialised housing and accommodation for older people.
- Quantitative estimates of future need for housing and accommodation for older people to 2033, and to 2037.
- Information about the Housing LIN (above) and our track record of undertaking assessments of need for housing and accommodation for older people and people with support needs.
- A summary of the methodological background and approach taken by the Housing LIN (Annexe 1) to undertaking assessments of need for housing and accommodation for older people and people with support needs.

[1] The Housing Learning & Improvement Network

2. Contextual evidence for housing and accommodation for older people in Epping Forest District

Demographic profile: Population aged 65+ in Epping Forest District

2.01 Demographic data for Epping Forest District is analysed in relation to the 65+ population and its Chartered Institute of Public Finance and Accountancy (CIPFA) comparators.

2.02 The CIPFA comparators are 15 local authorities that are similar in demographic and socioeconomic makeup to Epping Forest District. This is based on the CIFPA Nearest Neighbours model.[2]

2.03 The ONS 2021 census population estimates[3] have been used to provide an up-to-date estimate of the older population living in Epping Forest District and its CIPFA comparators.

2.04 The ONS 2018-based subnational projections for England[4] has been used to project the 2021 census populations forward for the years 2023, 2027, 2033 and 2037, where 2021 has been used as the base year for future projected years.

2.05 Tables 1 and 3 show the population projections for Epping Forest District and its CIFPA comparators up to 2037 for the 65+ and 75+ populations respectively, and tables 2 and 4 show the percentage change for these populations relative to 2021 for 65+ and 75+ populations respectively.

[2] Chartered Institute of Public Finance and Accounting – Nearest Neighbours model: https://www.cipfa.org/services/cipfastats/nearest-neighbour-model
[3] ONS P02 Census 2021: Usual resident population by five-year age group, local authorities in England and Wales
[4] ONS 2018-based Subnational Population Projections for England; released in 2020

Table 1. 65+ population projections, for Epping Forest District and its comparators, projected forward to 2023, 2027, 2033 and 2037.

Authority	65+ population projections from the 2021 census				
	2021 census	2023	2027	2033	2037
Epping Forest District	**26,300**	**26,982**	**28,839**	**32,209**	**34,054**
Brentwood	15,500	15,640	16,295	17,584	18,151
East Hampshire	29,100	30,491	33,322	37,471	39,503
East Hertfordshire	27,300	28,481	31,313	36,046	38,449
Horsham	33,500	35,100	38,778	44,825	47,787
Mid Sussex	31,500	32,492	35,036	39,549	41,979
North Hertfordshire	25,800	26,600	28,567	31,928	33,523
Reigate and Banstead	26,800	27,664	29,783	33,699	35,778
Sevenoaks	25,900	26,473	27,916	30,579	31,788
South Oxfordshire	30,500	31,551	33,948	37,846	39,946
Test Valley	27,700	28,855	31,280	35,141	36,994
Three Rivers	17,000	17,408	18,437	20,344	21,379
Tonbridge and Malling	25,200	26,181	28,471	32,449	34,622
Vale of White Horse	27,500	28,702	31,586	35,961	38,326
West Oxfordshire	24,700	25,819	28,430	32,529	34,584
Winchester	24,700	25,724	27,867	31,520	33,269
Comparator Average	**26,188**	**27,135**	**29,367**	**33,105**	**35,008**
England	**10,401,200**	**11,041,499**	**11,922,568**	**13,408,469**	**14,190,801**

Source: ONS 2021 census & ONS 2018-based population projections for England

Table 2. Percentage change in the 65+ population projections for Epping Forest District, to 2037, in relation to its comparators.

Authority	% changes in 65+ population projections compared with 2021 census (base projected year)			
	2023	2027	2033	2037
Epping Forest District	**2.6%**	**9.7%**	**22.5%**	**29.5%**
Brentwood	0.9%	5.1%	13.4%	17.1%
East Hampshire	4.8%	14.5%	28.8%	35.7%
East Hertfordshire	4.3%	14.7%	32.0%	40.8%
Horsham	4.8%	15.8%	33.8%	42.6%
Mid Sussex	3.2%	11.2%	25.6%	33.3%
North Hertfordshire	3.1%	10.7%	23.8%	29.9%
Reigate and Banstead	3.2%	11.1%	25.7%	33.5%
Sevenoaks	2.2%	7.8%	18.1%	22.7%
South Oxfordshire	3.4%	11.3%	24.1%	31.0%
Test Valley	4.2%	12.9%	26.9%	33.6%
Three Rivers	2.4%	8.5%	19.7%	25.8%
Tonbridge and Malling	3.9%	13.0%	28.8%	37.4%
Vale of White Horse	4.4%	14.9%	30.8%	39.4%
West Oxfordshire	4.5%	15.1%	31.7%	40.0%
Winchester	4.1%	12.8%	27.6%	34.7%
Comparator Average	**3.6%**	**12.1%**	**26.4%**	**33.7%**
England	**6.2%**	**14.6%**	**28.9%**	**36.4%**

Source: ONS 2021 census & ONS 2018-based population projections for England

Table 3. 75+ population projection for Epping Forest District and its comparators, projected forward to 2023, 2027, 2033 and 2037.

Authority	75+ population projections from the 2021 census				
	2021 census	2023	2027	2033	2037
Epping Forest District	**12,600**	**13,581**	**14,375**	**15,648**	**16,967**
Brentwood	7,700	8,186	8,365	8,741	9,317
East Hampshire	14,100	15,737	17,564	19,667	21,331
East Hertfordshire	12,700	14,016	15,296	17,149	18,920
Horsham	16,300	17,978	19,999	22,647	24,952
Mid Sussex	15,400	16,930	18,533	20,443	21,978
North Hertfordshire	12,600	13,644	14,770	16,178	17,477
Reigate and Banstead	12,900	13,999	15,154	16,665	18,136
Sevenoaks	12,600	13,743	14,773	15,691	16,585
South Oxfordshire	15,000	16,436	17,916	19,533	20,959
Test Valley	13,200	14,703	16,289	17,949	19,347
Three Rivers	8,100	8,690	9,227	9,951	10,709
Tonbridge and Malling	12,100	13,324	14,298	15,627	17,044
Vale of White Horse	13,200	14,596	16,267	18,255	20,040
West Oxfordshire	12,000	13,255	14,808	16,681	18,352
Winchester	12,000	13,163	14,512	16,158	17,496
Comparator Average	**12,656**	**13,874**	**15,134**	**16,686**	**18,101**
England	**4,837,100**	**5,462,960**	**5,947,571**	**6,573,991**	**7,146,201**

Source: ONS 2021 census & ONS 2018-based population projections for England

Table 4. Percentage change in the 75+population projections for Epping Forest District, to 2037, in relation to its comparators.

Local authority	% changes in 75+ population projections compared to 2021 (base projected year)			
	2023	2027	2033	2037
Epping Forest District	**7.8%**	**14.1%**	**24.2%**	**34.7%**
Brentwood	6.3%	8.6%	13.5%	21.0%
East Hampshire	11.6%	24.6%	39.5%	51.3%
East Hertfordshire	10.4%	20.4%	35.0%	49.0%
Horsham	10.3%	22.7%	38.9%	53.1%
Mid Sussex	9.9%	20.3%	32.7%	42.7%
North Hertfordshire	8.3%	17.2%	28.4%	38.7%
Reigate and Banstead	8.5%	17.5%	29.2%	40.6%
Sevenoaks	9.1%	17.2%	24.5%	31.6%
South Oxfordshire	9.6%	19.4%	30.2%	39.7%
Test Valley	11.4%	23.4%	36.0%	46.6%
Three Rivers	7.3%	13.9%	22.8%	32.2%
Tonbridge and Malling	10.1%	18.2%	29.1%	40.9%
Vale of White Horse	10.6%	23.2%	38.3%	51.8%
West Oxfordshire	10.5%	23.4%	39.0%	52.9%
Winchester	9.7%	20.9%	34.6%	45.8%
Comparator average	**9.6%**	**19.6%**	**31.8%**	**43.0%**
England	**12.9%**	**23.0%**	**35.9%**	**47.7%**

Source: ONS 2021 census & ONS 2018-based population projections for England

2.06 In Epping Forest District, it is estimated that by 2033 (in relation to the 2021 census) there will be an increase of c.23% in the 65+ population and a c.25% increase in the 75+ population. By 2037 it is estimated that there will be an increase of c.30% in the projected 65+ population and a c.35% increase (in relation to the 2021 census) in the projected 75+ population.

2.07 In comparison to its CIPFA comparator average Epping Forest District has a lower percentage increase in the projected 75+ population to 2033, c.25% versus c.32%. In relation to the 65+ population to 2033, the difference between Epping Forest District and its the CIPFA comparator average is c.23% versus c.26%.

2.08 Epping Forest District's population for all age categories is projected to grow from approximately 135,000 people at the 2021 census to 140,416 people by 2033 and 141,994 people by 2037. This represents projected growth of the population for all age categories of 4.0% to 2033 and 5.2% by 2037, relative to 2021.

2.09 The below table shows the working age population, aged 18-64, compared to the 65+ population for Epping Forest District and the percentage change for each

population relative to the 2021 population. There is a significant projected increase in the 65+ population to 2033 compared to the projection for the 18-64 population which remains largely static.

Table 5. Comparison of the population projections of working age adults (18-64) with the 65+ population for Epping Forest District.

Population: age category	2021 census	2023	2027	2033	2037
18-64 population	78,300	78,505	78,557	78,622	78,730
18-64 (% change relative to 2021 census)	-	0.26%	0.33%	0.41%	0.55%
65+ population	26,300	26,982	28,839	32,209	34,054
65+ (% change relative to 2021 census)	-	2.6%	9.7%	22.5%	29.5%

Source: ONS 2021 census & ONS 2018-based population projections

Housing, health and social care context

2.10 Epping Forest District's average life expectancy at birth is 82.6 years[5], which is slightly higher than Essex's average life expectancy of 82.2 years, and higher than the average life expectancy for England of 81.5 years[6].

2.11 Epping Forest District's average life expectancy at age 65 is 20.4 years[7], compared to 20.5 years for Essex and 20.2 years for England.

2.12 Table 6 below shows the number of older people, aged 65+ in Epping Forest District who have a long-term health problem or disability[8]. These factors are likely to influence the need for specialist housing and accommodation for older people, such as extra care housing, as well as need for residential and nursing care.

Table 6. Number of older people 65+ that report a long-term health problem or disability in Epping Forest District.

Health / disability status	Number of people 65+
Day-to-day activities limited a lot	5,393
Day-to-day activities limited a little	5,652

Source: POPPI (2020)

2.13 The data shows that there are similar numbers of people aged 65+ that have their day-to-day activities 'limited a little' or 'limited a lot' due to long term health problems/disability, which may include self-care, shopping, cooking and other activities associated with maintaining independent living.

[5] Public Health England: Public Health Outcomes Framework - Epping Forest District
[6] ONS: 2020 National life tables – England
[7] Public Health England: Public Health Outcomes Framework – Epping Forest District
[8] ONS / Nomis 2011 UK census: DC3201EW - Long-term health problem or disability by general health by ethnic group by sex by age

2.14 The demand for residential and nursing care is also partly influenced by the local prevalence of dementia amongst the older population. Table 7 shows the prevalence of dementia (as a percentage of people aged 65+) within Essex[9], and an estimate of the prevalence of dementia within Epping Forest District[10].

2.15 Epping Forest District's estimated prevalence of dementia (percentage of people 65+ with dementia out of total 65+ population) is similar to that of Essex, East of England and England as a whole.

Table 7. Number of people 65+ with dementia and dementia prevalence as a percentage of the total 65+ population.

Area	Number of people 65+ with dementia in 2020	Percentage of people 65+ with dementia out of total 65+ population	Annual estimated % growth in people 65+ with dementia	Projected number of people 65+ with dementia to 2033	Projected number of people 65+ with dementia to 2037
Epping Forest District	1,052	3.9%	3.47% p.a.	1,639	1,879
Essex County	12,523	4.02%	3.70% p.a.	20,083	23,225
East of England regional average	94,310	3.95%	3.72% p.a.	151,625	175,477
England	422,973	3.97%	6.53% p.a.	962,604	1,239,754

Source: NHS Digital, Recorded Dementia Diagnoses publications, Epping Forest District 2016 JSNA.

Income and socioeconomic context

2.16 At the most recent census, home ownership amongst 65+ households in Epping Forest District was 81%[11], which is in line with the equivalent average English home ownership rate of 80%.

2.17 The Income Deprivation Affecting Older People Index (IDAOPI)[12] score is a measurement of people over the age of 60 living in relative poverty, and a higher score for a local authority implies a higher level of relative deprivation. Epping Forest District's IDAOPI score is 11.2%. In comparison to the English average deprivation (IDAOPI) amongst older people, Epping Forest District is relatively less deprived, as the English average level of deprivation is 14.2%.

[9] NHS Digital, Recorded Dementia Diagnoses publications, December 2020 – accessed via OHID: Dementia Profile
[10] Essex Local Authority Portraits (Essex JSNA 2016): A profile of people living in Epping Forest – April 2016; Essex County Council
[11] Office for National Statistics (2021 census). RM201 - Tenure by age - Household Reference Persons
[12] Local Government Association: IDAOPI score – based on data from MHCLG

2.18 The level of deprivation amongst the older population and the local home ownership rates have been used to inform the tenure disaggregation of net need for specialist housing for older people. For Epping Forest District, the level of deprivation amongst the older population is approximately at the median level of its CIPFA comparators and is less deprived than England as a whole.

2.19 The rate of home ownership amongst 65+ households in Epping Forest District is in line with the national average rate. This, combined with the relatively lower levels of deprivation compared to the national level, suggests that Epping Forest District is likely to experience higher need for housing for older people for sale / shared ownership over social/affordable rent, due to higher relative wealth amongst the older population and the likelihood of being able to purchase their own property.

Existing older people's housing and accommodation

2.20 Data from the Elderly Accommodation Counsel's (EAC)[13] national database of older people's housing provision data was reviewed to confirm the current supply in Epping Forest District, in relation to social and private sector housing for older people. The EAC is a charity that has produced the only database in the UK of housing services designated for older people. They undertake this work as part of their charitable objects but also to provide a housing for older people portal.

2.21 For residential and nursing care data from the Care Quality Commission[14] (CQC) has been used to provide figures of current supply of care bedspaces within Epping Forest District. The CQC database is a live dataset based on care providers registering their services with the CQC (which they are legally required to do).

2.22 The following definitions of older people's housing are used to describe the different types of housing and accommodation for older people:

- **Housing for Older People (HfOP)**[15]: social sector sheltered and age-designated housing and private sector retirement housing. The most common types of Housing for Older People are:
    - **Sheltered social housing**: These schemes typically offer self-contained accommodation commonly available for social rent. They are usually supported by a part-time/visiting scheme manager and 24-hour emergency help via an alarm. There are often communal areas and some offer activities. Most accommodation is offered for rent, based on need, by local councils or housing associations.
    - **Private sector retirement housing**: This is typically similar to sheltered social housing, but it is usually built by private developers for market sale. Once all the properties have been sold, the scheme is sometimes run by a separate

[13] Elderly Accommodation Counsel housing data (Q4 2019)
[14] CQC: Care Home Directory – April 2021
[15] EAC - HousingCare Glossary

management company that employ the scheme manager and organise maintenance and other services.

- **Housing with care (HwC)[16]:** (often referred to as **'extra care housing'** when provided by housing associations and local authorities and **'assisted living'** by private sector providers). Housing with care is designed for older people, some with higher levels of care and support needs. Residents live in self-contained homes. It typically has more communal facilities and offers access to onsite 24/7 care services , which includes assistance with meal preparation, washing and other daily duties. Often includes a 24/7 alarm system, presence of a scheme manager and a team of support staff.
- **Residential care home[17]**: a residential setting where a number of older people live, usually in single rooms, and have access to on-site social care services. 24/7 onsite personal social care services include help with washing and dressing. Residential care homes do not consist of self-contained units.
- **Nursing care home[18]:** similar to a residential care home, but additionally providing care from qualified nurses. There will always be 1 or more qualified nurses on duty to provide nursing care. These are sometimes called 'care homes with nursing'. The Care Quality Commission states that in addition (to a residential care home), "qualified nursing care is provided, to ensure that the full needs of the person using the service are met." Nursing care homes do not consist of self-contained units.

2.23 Tables 8 and 9 provide an overview of the aggregate number of units of housing and accommodation for older people for all of the categories above.

[16] https://www.housinglin.org.uk/Topics/browse/HousingExtraCare/what-is-extra-care/
[17] NHS: Care homes: https://www.nhs.uk/conditions/social-care-and-support-guide/care-services-equipment-and-care-homes/care-homes/
[18] NHS: Care homes: https://www.nhs.uk/conditions/social-care-and-support-guide/care-services-equipment-and-care-homes/care-homes/

Table 8. Current supply of specialist Housing for Older People (HfOP) and Housing with care (HwC) in Epping Forest District and for its comparators.

Local Authority	HfOP (units)				HwC (units)			
	Sale / shared ownership	Rent (affordable; social)	Total	Prev	Sale / shared ownership	Rent (affordable; social)	Total	Prev
Epping Forest District	**480**	**783**	**1,263**	**48**	**60**	**60**	**120**	**10**
Brentwood	326	668	994	64	0	26	26	3
East Hampshire	835	702	1,537	53	56	0	56	4
East Hertfordshire	558	907	1,465	54	56	148	204	16
Horsham	1,197	991	2,188	65	11	202	213	13
Mid Sussex	927	884	1,811	57	56	86	142	9
North Hertfordshire	747	784	1,531	59	174	225	399	32
Reigate and Banstead	933	698	1,631	61	0	60	60	5
Sevenoaks	689	1,194	1,883	73	0	153	153	12
South Oxfordshire	713	737	1,450	48	113	120	233	16
Test Valley	629	409	1,038	37	155	90	245	19
Three Rivers	420	629	1,049	62	0	0	0	0
Tonbridge and Malling	535	487	1,022	41	51	183	234	19
Vale of White Horse	576	456	1,032	38	0	85	85	6
West Oxfordshire	713	273	986	40	120	44	164	14
Winchester	566	1,203	1,769	72	135	106	241	20
Comparator Average	**678**	**738**	**1,414**	**54**	**62**	**99**	**161**	**13**
England	**151,683**	**432,391**	**584,074**	**56**	**13,629**	**46,176**	**59,805**	**12**

Source: Elderly Accommodation Counsel (2019).

N.B. 'Prev' denotes the prevalence rate – the number of housing units per 1,000 population 65+ (applied to Housing for Older People) and 75+ (applied to Housing with care)

Table 9. Current supply of residential and nursing care beds in Epping Forest District, and for its comparators.

Local Authority	Residential care (beds)	Prev	Nursing care (beds)	Prev
Epping Forest District	**601**	**48**	**667**	**53**
Brentwood	348	45	414	54
East Hampshire	484	34	797	57
East Hertfordshire	338	27	726	57
Horsham	256	16	926	57
Mid Sussex	571	37	916	59
North Hertfordshire	677	54	491	39
Reigate and Banstead	764	59	984	76
Sevenoaks	546	43	485	38
South Oxfordshire	214	14	920	61
Test Valley	281	21	634	48
Three Rivers	288	36	356	44
Tonbridge and Malling	232	19	427	35
Vale of White Horse	263	20	946	72
West Oxfordshire	204	17	927	77
Winchester	487	41	728	61
Comparator average	**410**	**32**	**709**	**56**
England total	**188,439**	**39**	**203,769**	**42**

Source: Care Quality Commission (2021).
N.B. 'Prev' denotes the prevalence rate – the number of care bedspaces per 1,000 population 75+

2.24 In relation to housing for older people (HfOP), Epping Forest District has a relative undersupply particularly in terms of housing for older people for sale/shared ownership, compared to the provision of housing for older people for (social/affordable) rent. In relation to housing with care (HwC), Epping Forest District has a relative undersupply compared to both its comparator authorities and to the all-England average.

2.25 In relation to residential care services, Epping Forest District has a substantially higher prevalence of beds compared to its comparator authorities and a higher prevalence than the all-England average. In relation to nursing care services, Epping Forest District has a relative undersupply of beds compared to its comparator authorities, however, it has a higher prevalence rate compared to the all-England average.

2.26 This evidence is contextual and is an element of the evidence that informs estimates of future need.

Summary of key findings related to housing, health and social care; income and socioeconomic context; and demographic data for Epping Forest District

2.27 The 65+ population in Epping Forest District is projected to grow by approximately c.23% by 2033 and c.30% by 2037, relative to the 2021 census population, compared with c.26% and c.34% respectively for its CIPFA comparator authorities (Table 2).

2.28 The 75+ population in Epping Forest District is projected to grow by approximately c.24% by 2033 and c.35% by 2037, relative to the 2021 census population, compared to c.32% and c.43% respectively for its CIPFA comparators (Table 4).

2.29 Epping Forest District has a life expectancy slightly higher than Essex County (82.6 years for Epping Forest District and 82.2 years for Essex) and England (81.5 years) (paragraph 2.10).

2.30 There are approximately 11,000 people 65+ in Epping Forest District with a long-term disability or health problem who experience limitations in terms of their day-to day activities (Table 6).

2.31 There are approximately 1,052 people 65+ with dementia in Epping Forest District, projected to rise to 1,639 by 2033 and 1,879 by 2037 (Table 7).

2.32 Home ownership is c.80% in Epping Forest District, which is in line with the national home ownership rate (c.80%) (paragraph 2.16).

2.33 Income deprivation for older people is ranked at the approximate median level amongst Epping Forest District's CIPFA comparators and relatively less deprived than the English level of deprivation (paragraph 2.17).

3. Estimate of need for housing and accommodation for older people in Epping Forest District

3.01 The Housing LIN's current SHOP@[19] model has been used to estimate future need for specialist housing and accommodation for older people. This was originally developed with the Association of Directors of Adult Social Services (ADASS) and Elderly Accommodation Counsel (EAC) for the Department of Health's Market Development Forum to support local authorities to forecast demand for older people's housing and accommodation.

3.02 The SHOP@ housing need model has been adapted over the last few years so that the approach has moved away from the previous use of national generic 'benchmarks' or 'prevalence rates' to the use of prevalence rates derived from extensive research with a representative sample of older people, to better estimate future housing and accommodation need at local authority level (see Annexe 1).

Approach: considerations and assumptions

3.03 Data about the existing supply of older people's designated housing and accommodation in Epping Forest District is used as a 'baseline' of current provision. This data is provided by the Elderly Accommodation Counsel (EAC) and the Care Quality Commission (CQC). This study did not include a qualitative assessment of any of this housing/accommodation therefore no assumptions are made about its future 'fitness for purpose'.

3.04 ONS 2021 census population data[20] and ONS 2018-based subnational population data[21] is used to identify relevant older populations in Epping Forest District. Based on evidence from the Housing LIN's advisory work with housing providers and local authorities in relation to designated housing and accommodation for older people, SHOP@ uses the following population bases for estimating future need for housing and accommodation for older people, reflecting the typical ages of moves to these types of age-designated housing/accommodation:

- The 75+ population as the average age benchmark in relation to the need for housing with care, residential care and nursing care.
- The 65+ population as the average age benchmark in relation to the need for specialist housing for older people (sheltered housing and retirement housing).

3.05 The contextual evidence set out in this section (paragraphs 3.06-3.17) is used as a basis for reasoned assumptions in relation to estimating need for housing and accommodation for older people in Epping Forest District to 2033 (and 2037).

[19] SHOP@ - SHOP - Strategy - Extra Care - Topics - Resources - Housing LIN
[20] ONS P02 Census 2021: Usual resident population by five-year age group, local authorities in England and Wales
[21] ONS 2018-based subnational population projections; released in 2020.

3.06 Over c.80% of households headed by a person aged 65+ in Epping Forest District are homeowners (para 2.16). In comparison to the English average deprivation (IDAOPI) amongst older people, Epping Forest District is relatively less deprived.

3.07 Due to the relatively low level of deprivation amongst older people in Epping Forest District compared to the national level, and the home ownership rate being in line with the national rate, it is assumed that estimated future need for specialist housing for older people will mirror current tenure patterns, i.e., it is assumed that at c.80% of future need for specialist 'housing for older people' will be for owner occupation, including outright ownership/shared ownership options.

3.08 In relation to estimates of future need for housing with care, it is assumed that there will be a balance of 50%/50% need for owner occupation and social/affordable rent. This reflects Essex County Council's (ECC) social care policy intent of commissioning additional mixed tenure extra care housing.

3.09 In terms of the health and social care profile of the older population in Epping Forest District, evidence (paragraphs 2.10 – 2.15) indicates that average life expectancy is above the average for Essex and England. The number of people aged 65+ with dementia is projected to increase in Epping Forest District by 2033, and the prevalence in this population of 3.9% is slightly lower than the East of England regional average and England prevalence rates. The increasing incidence of dementia is a factor affecting likely need for residential care and nursing care.

3.10 Essex County Council's Housing Strategy[22] states that the council is prioritising development of specialised housing with care, in part as an alternative to residential care. The strategy states that:

"The fastest growing population in Essex is people aged over 85. We are committed to enabling older people to live independently. To support our ambitions, we are diversifying the housing offer for older people, to bring forward a programme of more appropriate housing, with care available on site."

3.11 Epping Forest District's Housing Strategy[23] states that there exists a need for additional rented and market extra care housing within the district. It estimated that there is a shortfall of approximately 127 units of extra care housing. It also states that there is no need to provide any more rented sheltered accommodation for people within the district, due to lower demand for rented sheltered accommodation over recent years.

3.12 The West Essex and East Hertfordshire Strategic Housing Market Assessment (SHMA)[24] states that older people are living for longer and are healthier.

[22] Essex County Council Housing Strategy: Draft Consultation Summary Document 2020
[23] Epping Forest District Council: Housing Strategy 2017-2022
[24] West Essex and East Hertfordshire Strategic Housing Market Assessment: Report of Findings (2015); Opinion Research Services

3.13 Based on the Housing LIN's previous experience of local authority commissioning and placement funding practice, and local intelligence from Council Officers, it is assumed that up to 20% of placements into residential care could be substituted with living in housing with care (extra care housing).

3.14 Evidence in relation to the preferences of older people to move (e.g. 'downsizing'/'rightsizing') to types of housing/accommodation better suited to the needs of older people is a key influencing factor in estimating need for housing/accommodation. The Housing LIN has drawn on primary research that it has conducted with c.2,800 people aged 65+, from all English regions over the last five years. In summary this evidence indicates:

- Older people are seeking wider choices in the range of housing and accommodation options that will facilitate independence. In some cases, this will be a move to alternative accommodation and for others this is about adapting their current home or bringing in care/support.
- In summary, the evidence from the primary research that the Housing LIN has conducted with c.2,800 people aged 65+ from all English regions provides the following guide to future behaviour in terms of the propensity of older people to move to alternative housing:
    a) Approximately 15%-25% of people aged 65+ indicate that they would *potentially* consider moving to alternative housing during the next five years.
    b) Approximately 4-8% of people aged 65+ express a *strong* likelihood of moving to a form of specialist housing for older people or to housing designed to be better suited to older people (but not age designated housing). Of these people:
        a. c.50% are interested in moving to some form of specialist age-designated housing (HfOP and HwC), primarily retirement housing (for sale) and modern sheltered housing (for social/affordable rent).
        b. c.50% are interested in moving to 'age friendly' housing that meets age related needs but is not age-designated housing.
    c) Approximately 1-4% of people aged 75+express a *strong* likelihood of moving to a form of specialist housing for older people, such as 'housing with care'.
- There is very limited interest in a move to residential care or nursing care as a choice of specialist accommodation; most moves to these types of accommodation are 'forced moves' as a result of, for example, an acute health and/or care episode. This is based on qualitative and quantitative research carried out by the Housing LIN, where participants typically only support a move to a care home where this is dictated by health-related needs.

3.15 A comparative analysis has been undertaken that compares the current supply or 'prevalence' of different types of housing and accommodation for older people (older people's housing for rent, older people's retirement housing for sale, extra care

housing for rent and for sale, residential and nursing care) in Epping Forest District with the Chartered Institute of Public Finance and Accountancy (CIPFA) 'Nearest Neighbour' comparator authorities[25], along with the all-England averages for supply of older people's housing and accommodation. This identifies how supply in Epping Forest District compares to comparator authorities and across England generally. This is summarised in tables 10, 11, and 12.

Table 10. Prevalence rates (i.e. the number of units per 1,000 population aged 65+) Housing for Older People in Epping Forest District, alongside its comparator average and all-England prevalence rates.

Area	Prevalence of HfOP
Epping Forest District	48
CIPFA comparator average	54
England	56

Table 11. Prevalence rates (i.e. the number of units per 1,000 people aged 75+) Housing with Care in Epping Forest District, alongside its comparator average and all-England prevalence rates.

Area	Prevalence of HwC
Epping Forest District	10
CIPFA comparator average	13
England	13

Table 12. Prevalence rates (i.e. the number of bedspaces per 1,000 population aged 75+) of residential and nursing care in Epping Forest District, alongside the comparator average and all-England prevalence rates

Area	Prevalence of Residential care	Prevalence of Nursing care
Epping Forest District	48	53
Comparator average	32	56
England	41	45

3.16 The comparisons show that:

- For Housing for Older People, Epping Forest District is below its comparators' average prevalence and the English prevalence rate.
- For Housing with Care, Epping Forest District is below its comparators' average prevalence and the English prevalence rate.
- For residential care, Epping Forest District is substantially above its comparators' average prevalence and above the English prevalence rate.
- For nursing care, Epping Forest District has a prevalence rate below its comparators' average, however, is above the English prevalence rate.

3.17 Epping Forest District has similarities, by definition, with its comparator authorities so variations are likely to reflect a relative under or oversupply of different types of specialist housing and accommodation for older people. Relative undersupply may

[25] https://www.cipfastats.net/resources/nearestneighbours/

reflect local factors such as supply constraints for delivering these types of accommodation (e.g. Green Belt land).

Projections: estimates of future need for housing and accommodation for older people

3.18 In relation to each of the types of housing and accommodation for older people (as set out in paragraph 2.22) these assumptions are summarised below:

- Housing for Older People:

  Need is likely to increase as a consequence of: an increase in the 65+ population (tables 1 and 2); relative undersupply of housing for older people for sale (table 8), in the context of over 80% home ownership amongst 65+ households (para 2.16); research conducted by the Housing LIN over the last 4 years with older people (para 3.14) indicating an interest in moving to housing suited to older people.

- Housing with care:

  Need is likely to increase as a consequence of: an increase in the 75+ population (tables 3 and 4); relative undersupply of housing with care, compared with comparator authorities (table 8); increasing prevalence of dementia related needs amongst the 65+ population (table 7).

- Residential care:

  Need is likely to 'flatline' i.e. the number of older people needing residential care is unlikely to increase significantly as a consequence of: the relative oversupply of residential care beds in Epping Forest District relative to its CIPFA comparator authorities and England (table 9); ECC's policy to develop housing with care as an alternative to residential care (para 3.18); evidence from research with older people indicating very limited interest in moving to care homes (para 3.14); and potential for the impact of the Covid-19 pandemic to reduce demand (amongst local authority funded placements and self-funders) (para 3.19).

- Nursing care:

  Need is likely to increase as a consequence of: an increase in the 75+ population (tables 3 and 4); increasing prevalence of dementia related needs amongst the 65+ population (table 7); and a relative undersupply of nursing care beds in Epping Forest District relative to its CIPFA comparator authorities (table 9).

3.19 In relation to the impact of the Covid-19 pandemic, any assumptions based on emerging evidence are highly tentative given that the impact of the pandemic on the specialist housing and accommodation sector for older people is not yet clear. At this stage considerations based on tentative evidence could suggest in the medium to longer term:

- There is potential for a downward shift in preference for use of residential care.

- There is potential for a preference amongst older people for remaining in their existing home, with care if required.

3.20 Table 13 shows the anticipated likely need (prevalence rate) and the associated estimated need (units/bedspaces) for each type of housing and accommodation for older people:

- 2021 current provision. The number of units for that type of housing/accommodation, using data from the Elderly Accommodation Counsel and the Care Quality Commission about specialist housing and accommodation (from tables 8 and 9).
- 2021 prevalence rate. The prevalence rate, the number of housing units/beds per 1,000 older people[26], based on population data from the ONS 2021 census and ONS 2018-based population projections and the Elderly Accommodation Counsel's and Care Quality Commission's specialist housing data (for units/beds).
- 2037 anticipated prevalence rate. An estimate of the likely prevalence rate, based on the considerations and assumptions that are set out in paragraphs 3.03 - 3.19.
- 2037 estimated need. An estimate of the number of units/bedspaces of housing and accommodation for older people that will be needed, based on estimated need (prevalence rates) for 2037 and the applicable projected 65+ or 75+ population for 2037.
- 2037 estimated net need. A calculation of the additional number of units/bedspaces that are estimated to be required by 2037, in order to meet the estimated need for that type of housing/accommodation. It is the 2037 estimated need minus the current provision.

Table 13. Current and anticipated provision, prevalence and need for housing and accommodation, to 2037 in Epping Forest District.

Housing/accommodation type	2021 provision (units / beds)	2021 prevalence rate	2037 anticipated prevalence rate	2037 estimated need	Net need (units)
Housing for Older People	1,263	48	55	c.1,870	c.610
Housing with Care	120	10	17	c.290	c.170
Residential care	601	48	41	c.700	c.90
Nursing care	667	53	56	c.950	c.280

N.B. Estimates have been rounded to the nearest 10 units / bedspaces.

3.21 The estimated total need for housing and accommodation for older people is shown disaggregated for 2023, 2027, 2033 and 2037 in table 14 and the estimated net need is shown in table 15, which shows the projected need additional to the current supply. Net need is not cumulative.

[26] Population 65+ for housing for older people; population 75+ for housing with care and residential/nursing care

Table 14. Estimated total need (including current supply) for older people's housing and accommodation to 2037, in Epping Forest District.

Housing / accommodation type	2023	2027	2033	2037
Housing for Older People (units)	c.1,340	c.1,490	c.1,720	c.1,870
Housing with Care (units)	c.150	c.190	c.240	c.290
Residential care (bedspaces)	c.630	c.640	c.670	c.700
Nursing care (bedspaces)	c.730	c.780	c.860	c.950

N.B. These estimates have been rounded to the nearest 10 units / bedspaces.

3.22 The estimated net need for housing and accommodation for older people is shown disaggregated for 2023, 2027, 2033 and 2037 with a suggested tenure split of need for housing for older people and housing with care in table 15. Net need is not cumulative.

Table 15. Estimated net need (excluding current supply) for older people's housing and accommodation to 2037, by tenure, in Epping Forest District.

Housing / accommodation type	2023	2027	2033	2037
Housing for Older People (units)	c.80	c.220	c.450	c.610
For rent	*c.10*	*c.30*	*c.70*	*c.90*
For sale / shared ownership	*c.70*	*c.190*	*c.380*	*c.520*
Housing with Care (units)	c.30	c.70	c.120	c.170
For rent	*c.15*	*c.35*	*c.60*	*c.85*
For sale / shared ownership	*c.15*	*c.35*	*c.60*	*c.85*
Residential care (beds)	c.20	c.40	c.70	c.90
Nursing care (beds)	c.60	c.120	c.200	c.280

N.B. Net need estimates have been rounded to the nearest 10 units /bedspaces for the totals for Housing for Older People, Housing with Care, Residential Care and Nursing Care, and to the nearest 5 units for rent and sale/shared ownership units. each of the housing and accommodation categories.

3.23 In summary, this indicates that the estimated housing/accommodation for older people net need requirements for Epping Forest District by 2033 and 2037 are shown in table 16.

Table 16. Housing and accommodation for older people, net estimated need to 2033 and 2037, in Epping Forest District.

Housing type and use class	Number of units/bedspaces: 2033	Number of units/bedspaces: 2037
Housing for older people (retirement and contemporary 'sheltered housing'). Use class C3	c.450 units: • c.70 for social/affordable rent • c.380 for sale	c.610 units: • c.90 for social/affordable rent • c.520 for sale
Housing with care (extra care housing). Use class C3/C2	c.120 units: • c.60 for social/affordable rent • c.60 for sale	c.170 units: • c.85 for social/affordable rent • c.85 for sale
Residential care. Use class C2	c.70 bedspaces	c.90 bedspaces
Nursing care. Use class C2	c.200 bedspaces	c.280 bedspaces

4. Summary of findings

4.01 The findings from this assessment of estimated need for housing and accommodation for older people in Epping Forest District are summarised. The estimated housing and accommodation for older people net need requirements for Epping Forest District to 2037 are as follows:

4.02 **Housing for older people** (retirement housing for sale and contemporary 'sheltered housing' for social/affordable rent[27]). The estimated housing for older people net need to 2033 is c.450 units of which c.70 for social/affordable rent and c.380 for sale. The estimated housing for older people net need to 2037 is c.610 units of which c.90 for social/affordable rent and c.520 for sale. From previous Housing LIN research there is potential that up to 50% of this estimated need could be met through the provision of mainstream housing. This is housing that is designed for and accessible to older people even if it is not technically 'designated' for older people, for example housing that is 'care ready' and suited to ageing as distinct from 'retirement housing'. This will include mainstream housing to accessible and adaptable standards M4(2) and M4(3).

4.03 **Housing with care** (extra care housing). The estimated housing with care net need to 2033 is c.120 units of which c.60 for rent and c.60 for sale. The estimated housing with care net need to 2037 is c.170 units of which c.85 for rent and c.85 for sale. This will meet the housing and care needs of older people who are self-funders as well as older people who need rented accommodation and may be eligible for care funding from the County Council. This need can be met in part through mixed tenure development of extra care housing. A component of the need for social rented extra care housing is likely to come from Essex County Council's policy intent to offer extra care housing as an alternative to residential care for some older people.

4.04 **Residential care**. The estimated residential care net need to 2033 is c.70 bedspaces. The estimated residential care net need to 2037 is c.90 bedspaces. Based on the evidence of dementia amongst the older population and that the 75+ population is projected to increase to 2037, it is likely that a significant proportion of unmet need is likely to be for dementia related needs capacity.

4.05 **Nursing care**. The estimated nursing care net need to 2033 is c.200 bedspaces. The estimated nursing care net need to 2037 is c.280 bedspaces. Based on the evidence of dementia prevalence amongst the older population and that the 75+ population is projected to increase to 2037, it is likely that a significant proportion of unmet need is likely to be for dementia related needs capacity.

4.06 The Housing LIN's research with older people also shows that there should be caution exercised in the use of assessments of need for different housing 'typologies' given that older people who have a strong interest in/likelihood of moving have a wide range of motivations, for example, an older person/household may move to a

[27] New build and refurbishment of sheltered housing for social/affordable rent.

'housing with care' scheme not because they need care but because they are motivated by other considerations, such as location, the design or other services provided.

4.07 Hence the Housing LIN's assessments of need for housing and accommodation for older people suggest that it is more reflective of likely need to consider the *overall* total estimates of need for housing and accommodation rather than focussing exclusively on the suggested estimates of need for different housing and accommodation typologies.

Annexe 1. Background and methodology note.

The Housing LIN has been developing and refining approaches to estimating future need for housing and accommodation for older people since 2011.

In 2011, the Housing LIN developed a housing need forecasting tool, which was subsequently referred to as SHOP@. The earliest version of SHOP@ was contained within a larger suite of documents referred to as *Strategic Housing for Older People* (SHOP), specifically in a supplementary paper within SHOP, 'Section A, Paper A2'.

SHOP and SHOP@ were supported by the Association of Directors of Social Services and were intended at that time to provide a guide, primarily for local authorities, to identify need for types of 'specialist' housing for older people, such as sheltered and retirement housing and extra care housing, across all tenures.

SHOP@ provided a set of standardised' prevalence' rates for different types of specialist housing for older people (refereed to below as a housing 'typology'), which could be used by local authorities and their partners to estimate need for specialist housing for older people, specifically:

FORM OF PROVISION	ESTIMATE OF DEMAND PER THOUSAND OF THE RELEVANT 75+ POPULATION
Conventional sheltered housing to rent	60
Leasehold sheltered housing	120
Enhanced sheltered housing (divided 50:50 between that for rent and that for sale)[36]	20
Extra care housing for rent	15
Extra care housing for sale	30
Housing based provision for dementia	6

This was provided as a 'free to use' resource for local authorities and their partners. It was also developed further by the Housing LIN and at that time provided as an online 'tool' for use by local authorities and their partners in relation to estimating need for specialist accommodation for older people.

The Housing LIN subsequently published, with other organisations with an interest in housing for older people, *Housing in later life: planning ahead for specialist housing for older people*, in 2012.

This 'toolkit' was published shortly after the *HAPPI 2* report – Housing our Ageing Population: Plan for Implementation – from the All Party Parliamentary Group on Housing and Care for Older People, which was authored by the Housing LIN.

Housing in later life also included a set of suggested 'prevalence' rates for different types of specialist housing for older people, specifically at Appendix B in table 19.

The 'target' provision per 1,000 of Population 75+ that are suggested as the basis for assessments of future need for specialist housing for older people in *Housing in Later Life* (from 2012) are from the previously published Housing LIN document *Strategic Housing for Older People* specifically from 'Section A, Paper A2'.

That is, the suggested prevalence rates, or 'target' provision per 1,000 of Population 75+ that are suggested as the basis for assessment of future need for specialist housing for older people in *Housing in Later Life*, are identical to those from the Housing LIN SHOP@ modelling tool based on the suggested prevalence rates contained in *Strategic Housing for Older People*.

Given these 'target' provision per 1,000 of Population 75+ are now over 11 years old, these documents remain on the Housing LIN website as archived for reference purposes *only* with the following caveat:

This 2011 version of the SHOP Resource Pack is now out of date and uploaded as an archived record only. However, the Housing LIN has since worked with many councils individually to further develop and to help produce their local housing strategies for extra care housing and supported housing. Please consult with us on your requirements so we can best advise on the most up-to-date resources and support available from the Housing LIN that would best suit your needs.

Since 2017 the Housing LIN has undertaken over 200 assessments of need for housing and accommodation for older people, and other people with care/support needs, for local authorities and providers of these types of specialist housing.

Based on this work, as well as extensive involvement in the housing and accommodation for older people sector since the early 2000s (see 'About the Housing LIN)', the Housing LIN has refined and developed its approach to estimating need for housing and accommodation for older people which takes account of:

1. Most significantly, evidence from extensive primary qualitative research that the Housing LIN has undertaken since 2017 with older people about their future housing preferences. We have undertaken research with a representative sample of over c.2,800 people aged 65+, from all English regions, using a mix of qualitative research methods including surveys, structured focus groups and 1-to-1 interviews.
2. Market changes in provision of housing and accommodation for older people since 2011/12; this includes the use of comparisons between a local authority area and its CIPFA comparator authorities in relation to the current supply of different types of specialist provision of housing and accommodation for older people and trends in the uptake and development of this provision.
3. Socio-economic evidence: such as the current tenure mix amongst older households and levels of affluence/deprivation amongst older households, to inform the

potential tenure mix of estimated need for housing and accommodation for older people.

4. Relevant local health and care evidence including the local policy context; this includes evidence in relation to the prevalence of health and care conditions and trends that are likely to influence need for housing and accommodation for older people, such as trends in the prevalence of dementia and other health/care needs amongst the local older population.
5. Importantly, the Housing LIN also seeks local market evidence and intelligence from the relevant local authority/ies with adult social services responsibilities, for example in relation to their understanding of local care markets and trends, and their intelligence about potential need for specialist housing and accommodation for older people.
6. Demographic evidence; the application of trends in the older population, particularly the 65+ and 75+ population.

This mix of evidence is used to produce estimates of need for different types of housing and accommodation for older people.

The evidence from our extensive primary qualitative research with older people, has been the most influential source of evidence in how the Housing LIN has refined and modified its approach to estimating likely future need for housing and accommodation for older people. This evidence from this primary research with older people has increasingly shown that the types of suggested prevalence rates for housing and accommodation provision per 1,000 of Population 75+ that are used by methodologies/assessment tools which are based on a synthesis of *secondary* data, typically without the use of evidence from primary research with older people, typically are at risk of significantly overstating the likely need for specialist housing and accommodation for older people.

The evidence from the primary research that the Housing LIN has conducted with a representative sample of c.2,800 people aged 65+, from all English regions, provides the following guide to future behaviour in terms of the propensity of older people to move to alternative housing:

a) Approximately up to 25% of people aged 65+ express a *potential* interest in moving to some type of alternative housing (from their existing housing setting).

b) However, approximately 4-8% of people aged 65+ express a *strong* likelihood of moving to a form of specialist housing for older people or to housing designed to be better suited to older people that is not age designated housing.

c) And, approximately 1-4% of people aged 75+express a *strong* likelihood of moving to a form of specialist housing for older people, such as 'housing with care' (extra care housing).

The Housing LIN uses the evidence from this primary research with older people, specifically b) and c) above, to derive anticipated prevalence rates for 'housing for older people' and 'housing with care' respectively, as the initial basis for estimating the likely future need for

housing and accommodation for older people. In our experience this is likely to be more reliable than models for estimating such need that are based on a review and use of secondary data sources, i.e. models for estimating need for housing and accommodation for older people that have not involved direct primary research with older people (it should be noted that estimation models and methods that may quote or review secondary evidence from qualitative research are not likely to be as robust or reliable as estimation models directly derived from primary research with older people).

The Housing LIN's research with older people has also identified a degree of regional variation in the likelihood of older people to move and preferences for different housing and accommodation types.

As a consequence, the Housing LIN has moved away from the use of standardised prevalence rates per 1,000 of Population 75+, such as the prevalence rates from *Strategic Housing for Older People* (SHOP) and which are replicated in *Housing in Later Life*.

The Housing LIN's research with older people has also influenced changes in the way in which we describe a housing and accommodation for older people typology; specifically, we no longer use the housing typology categories in SHOP and Housing in Later Life (see table from SHOP above for the previous housing typology). Our research has identified that the typology of specialist older persons' housing as set out in the SHOP and *Housing in Later Life* are increasingly less representative of the types of housing that older people consider as possible housing options in later life.

Our research has shown that amongst older people expressing an interest in moving to housing that better suits their needs, there is an interest in moving to housing that is designed to better meet the needs of older people (for example, in relation to inclusive design features) but that is *not* age designated, as well as potential interest in age designated retirement and sheltered housing (for sale and for affordable rent). The Housing LIN's assessment of need for housing and accommodation for older people, referred to as 'housing for older people' includes a statement of the balance of likely need between retirement and sheltered housing and likely need for housing suited to older people through design but that is not age designated.

Our research with older people has shown that previous typology distinctions between 'enhanced' sheltered housing and extra care housing are not recognised by or reflected in older people's future housing preferences. The Housing LIN uses a broader typology of 'housing with care' to describe a specialist housing typology that has associated support and care services.

However, our research with older people also shows that there needs to be caution exercised in the use of assessments of need for different housing typologies given that older people who have a potential or strong interest in moving have a wide range of motivations, for example, an older person/household may move to a 'housing with care' scheme not because they need care but because they are motivated by other considerations, such as location, the design or other services provided.

Hence the Housing LIN's assessments of need for housing and accommodation for older people suggest that it is more reflective of likely need to consider the *overall* total estimates of need for housing and accommodation rather than focussing exclusively on the suggested estimates of need for different housing and accommodation typologies.

In summary, the Housing LIN's approach to estimating need for housing and accommodation for older people is based on the use of the evidence of older people's propensity to move (as set out above), and corroborated with other relevant evidence (2, 3, 4 and 5 above), then applied to relevant demographic evidence to derive estimated future prevalence rates for a local area as a base for estimating future need for housing and accommodation for older people (as applied in table 13). This approach has been used to produce estimates of need for housing and accommodation for older people in Epping Forest.