
Report to McCarthy & Stone

**PROPOSED DEVELOPMENT OF
RETIREMENT LIVING
ACCOMMODATION FOR SALE AT
Spath Road/ Lancaster Road,
Didsbury, Manchester M20 2TZ**

**Evidence of housing demand and
supply**

Three Dragons and Celandine Strategic Housing

September 2020



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1. EXECUTIVE SUMMARY

Methodology

- 1.1 Three Dragons and Celandine Consulting were commissioned in August 2020 by The Planning Bureau Ltd. to undertake a housing need and demand study for a McCarthy & Stone Retirement Living development proposal on a site at Spath Road/ Lancaster Road, Didsbury, M20 2TZ. The site lies within the Manchester City Council administrative area. The development is to comprise 34 properties for Retirement Living. The study was required to consider the need for retirement housing in light of the availability of owner occupier accommodation for the older population and forecast demographics and modelled need to support such provision.

Selection of areas

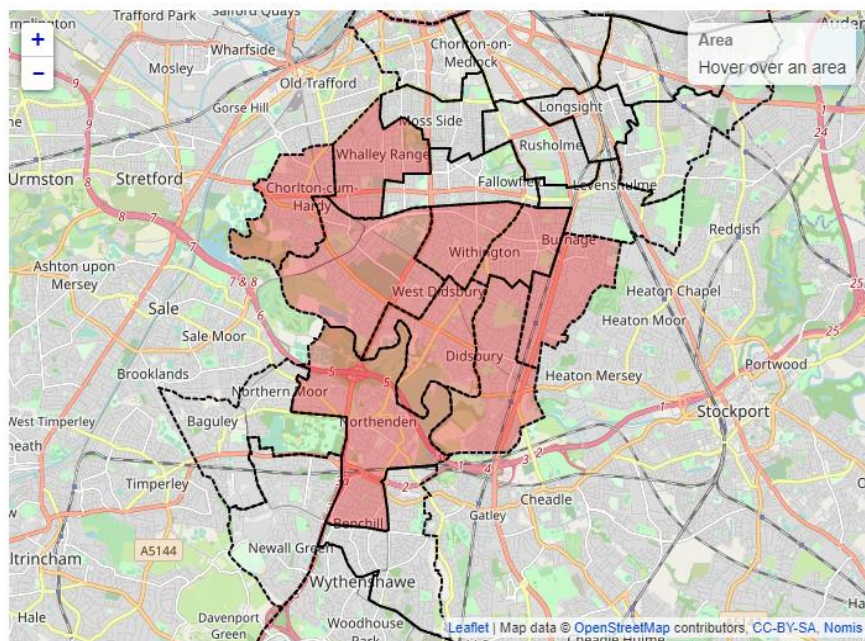


Figure 1 Extract from Nomis map showing wards selected

Ward Ref	Ward Name	Ward Ref	Ward Name
E36006278	Burnage	E36006281	Chorlton
E36006282	Chorlton Park	E36006285	Didsbury East
E36006286	Didsbury West	E36006298	Northenden
E36006299	Old Moat	E36006302	Whalley Range
E36006303	Withington		

Table 1 Wards included within Needs Assessment

- 1.2 This report puts forward detailed information on the supply of housing for older people in the Didsbury area of Manchester. An undersupply of sheltered accommodation for sale is a key feature of the local market. The report describes the wider benefits of this type of provision, how it can meet the housing requirements of the Council and an important sector of the community and how it relates to the planning, housing and care policies of Manchester City Council and its partners.

- 1.3. The study was undertaken in September 2020. It drew on published information sources including:
- MCC Core Strategy 2012 to 2027
 - MCC Local Plan Issues Consultation 2020
 - GMCA revised draft Greater Manchester's Plan for Homes, Jobs, and the Environment (2019)
 - MCC Residential Growth Strategy 2017
 - MCC State of the City Report 2019
 - MCC Living Longer Living Better 2014-20
 - MCC AMR 2017/18
 - MCC A Housing Strategy 2016–2021
 - GMCA Greater Manchester Strategic Housing Market Assessment (2019)
 - Joint Health and Wellbeing Strategy 2026
- 1.4. We have also undertaken an analysis of older persons' housing demand and supply in the Didsbury area of Manchester using two of the methodologies recommended in "Housing in Later Life"¹: the Retirement Housing Group (RHG) model and the Contact Consulting model. Both these methodologies focus on demand from existing households and both suggest that potential demand for retirement housing for home ownership is higher than current provision.

Definitions and Terminology

- 1.5. This report distinguishes between various types of specialist older persons' accommodation including:
- a. Sheltered housing (otherwise known as Retirement Living) which offers support but not care
 - b. Enhanced Sheltered (sheltered accommodation where additional support and services can be provided)
 - c. Extra Care (including McCarthy and Stone Retirement Living Plus) which provides a wider range of care.
- 1.6. Other technical terms and acronyms are explained in the Glossary at Appendix 1.

The Case for Development

- 1.7. **Older people living in specialist accommodation enjoy better health and make fewer demands on health and social care services. They feel more secure and enjoy improved quality of life.** Private retirement accommodation can meet the needs of many older

¹ Housing in Later Life: planning ahead for specialist housing for older people, Housing LIN and others, December 2012

people and can contribute to maintaining independence and minimising the health impacts of ageing hence keeping down the cost of care to individuals and to the local authority.

1.8. Planning practice guidance from MHCLG states that

- “Plan-making authorities should assess the need for housing of different groups and reflect this in planning policies.”².
- The need to provide housing for older people is critical. People are living longer lives and the proportion of older people in the population is increasing. In mid-2016 there were 1.6 million people aged 85 and over; by mid-2041 this is projected to double to 3.2 million. Offering older people a better choice of accommodation to suit their changing needs can help them live independently for longer, feel more connected to their communities and help reduce costs to the social care and health systems.³
- Plans need to provide for specialist housing for older people where a need exists. Innovative and diverse housing models will need to be considered where appropriate⁴
- Private retirement accommodation can meet the needs of many older people and can contribute to maintaining independence and minimising the health impacts of ageing, hence keeping down the cost of care to individuals and to the local authority⁵.

1.9. A recent study by the County Council Network (CNN) and the Association of Retirement Community Operators (ARCO) found that

- The availability of suitable housing stock is critical to the health and well being of older individuals
- it is also a key factor in the capacity of public services to sustainably support healthy ageing over the long term delivering both improved outcomes and huge efficiencies
- Local planning authorities should consider including policies within their local plans that outline the current and future need for older people’s housing and care including retirement communities
- The study set a joint goal of providing housing with care for 250,000 people by 2030.

² PPG 2019 Paragraph: 001 Reference ID: 67-001-20190722

³PPG 2019 Paragraph: 001 Reference ID: 63-001-20190626

⁴ PPG 2019 Paragraph: 012 Reference ID: 63-012-20190626

⁵ PPG 2019 Paragraph: 001 Reference ID: 63-001-20190626

Recent research by WPI Strategy Ltd for Homes for Later Living reported that

The 2017/18 English Housing Survey found that **67% of homeowners aged 65 or over live in an under-occupied property**, equivalent to 3.6 million households in England. (p17)

The UK has the oldest housing stock in the EU with 38% of our homes dating from before 1946 and 21% from before 1919. Older homes are often in a poor state of repair and have more dangers including cold, damp, fire risk and general fall hazards. They also tend to be lacking basic adaptations such as handrails in the shower and on the stairs as well as more substantial elements such as wider internal doors, stairlifts and walkin showers. For less mobile older people these adaptations mean that everyday essential tasks like getting out of bed going to the bathroom or getting dressed are safer and more manageable, helping to support their independence. (p10)

In 2017/18 falls accounted for 335,000 hospital admissions in England of people aged 65 and over. Around half of people aged 80 and over fall at least once a year. The NHS has described falls and fractures in older people as *“a costly and often preventable health issue”*. (p12)

A cold home can cause chronic and acute illnesses and lead to reduced mobility, falls and depression. In 2018 the House of Commons Housing, Communities and Local Government Committee heard there was a well evidenced link between cold homes and chronic diseases such as respiratory and cardiovascular diseases and rheumatoid arthritis and poor mental health. The Committee also heard that cold homes were connected to acute cases such as heart attacks, strokes and falls. (p13)

Around 1.5 million people aged 50 and over are always or often lonely and projections from Age UK suggest this could rise to 2 million people within the next 10 years. Older people who are lonely are more than three times more likely to suffer depression and 1.9 times more likely to develop dementia in the following 15 years. (p13)

The average person living in specialist housing for older people saves the NHS and social services £3,490 per year. This is because people living in specialist older persons housing are around half as likely to have falls. They are also far less likely to be lonely, making them significantly less likely to develop dementia and increasing the chance that if they suffer a stroke they will get the urgent medical attention they need. (p19)

Specialist older persons housing can help save the High Street. Given the majority of developments for later living are located on or close to a High Street there are also significant community benefits: businesses situated nearby can expect to feel the effects of the grey pound as residents regularly use shops and local facilities; organisations such as libraries, charity shops and community centres can also benefit. (p14)

Increased personal well-being. Scores from moving into a Homes for Later Living property restore to over-80s living in these properties a sense of personal well-being that would otherwise have peaked when they were 65- 74 years old (the mid-point being 70). In other words, matching personal well-being levels of those at least ten years younger. (p21)

- 1.10. **There is a shortage of specialist older persons' housing for sale in the Didsbury area of Manchester and across the City as a whole. Depending on the methodology used for estimating demand, demand for sheltered housing for sale or shared equity is estimated to be in a range between 228 and 325 units. Provision of the proposed scheme of 34 units for sale will help to reduce the shortfall. It can free up family housing which is currently under-occupied.**
- 1.12 **Manchester City Council has committed to providing Age Friendly Neighbourhoods and communities. The City Council and its partners recognise that accessible housing in strong communities can reduce falls and social isolation, offering protection to lonely and vulnerable people, thereby prolonging years of healthy living and reducing costs to the NHS.**
- 1.13 **The Council specifically seeks to provide retirement housing through delivery of extra care accommodation, but it has also recognised the need for a variety of housing options which meet the needs of older people from all income groups and keep them in the City. Retirement housing for leasehold is proven to reduce risk of falls and safeguard residents from isolation. A leasehold sale scheme at Spath Rd/Lancaster Rd can improve housing choice in the area, help safeguard the High Street and improve the health of residents.**
- 1.14 **Didsbury is a settlement identified by the Council as a suitable location for development.**
- 1.15 **Whichever aspect of this issue is considered, there is a clear and unmet need for a range of specialist retirement housing options for local people, including home owners. The proposed McCarthy and Stone Retirement Living scheme can make a positive contribution to meeting this need.**

2. LOCAL POLICY CONTEXT

- 2.1 This section considers the policies and the evidence base relevant to the provision of Retirement Living accommodation in Manchester.
- 2.2 Manchester City Council (MCC) has statutory responsibility for Housing and Planning and for Adult Social Care.
- 2.3 This report has been prepared with reference to the following strategies, policies and plans published by MCC and its partners:
- MCC Core Strategy 2012 to 2027
 - MCC Local Plan Issues Consultation 2020
 - GMCA revised draft Greater Manchester's Plan for Homes, Jobs, and the Environment (2019)
 - MCC Residential Growth Strategy 2017
 - MCC State of the City Report 2019
 - MCC Living Longer Living Better 2014-20
 - MCC AMR 2017/18
 - MCC A Housing Strategy 2016–2021
 - GMCA Greater Manchester Strategic Housing Market Assessment (2019)
 - Joint Health and Wellbeing Strategy 2026

District Profile

- 2.4 The Manchester City Council area is urban in nature but includes large areas of open space and a limited amount of Green Belt. Didsbury itself is characterised as a *“high-quality neighbourhood”* within the southern part of the city which includes some of the *“most sought after residential properties and neighbourhoods”*⁶.
- 2.5 Greater Manchester was the UK's first *“Age Friendly City”*⁷ and the strategies of the City of Manchester and the Greater Manchester Combined Authority (GMCA) clearly recognise the importance of meeting the needs of older person households.
- 2.6 The State Of The City Report 2019⁸ recognises that *“the population is maturing with more owner occupiers (higher value buyers as well as first timers) including older people moving back into the city centre and families opting to stay . . . The city and its partners have a responsibility to deliver a product that reflects the needs of its changing population”*.
- 2.7 The report Living Longer Living Better 2014-20 states that *“the design, accessibility, affordability and location of housing within neighbourhoods all have a huge impact on*

⁶ P18 Local Plan Issues Consultation MCC 2020

⁷ Age Friendly Cities are an international classification set up by the World Health Organisation which encourages cities to take a pro-active approach to meeting the needs of an ageing population

⁸ P137 State of the City Report 2019

health and well being . . . The delivery of housing for an age friendly Manchester will make a significant contribution to achieving the objectives of the Living Longer Living Better programme in the city . . . Age friendly communities with their networks of support activities and participation provide better environments for all ages and will help to deliver the Community Strategy. . . Retirement housing will focus on the availability of a wide choice of housing for older households across all neighbourhoods.⁹ It goes on to note that “Manchester has an active reasonably affluent sub group within the overall population of older people and we must provide exciting options for them”¹⁰.

- 2.8 Data from the 2011 Census (see section 3 of this report) shows that around half of all older people living in Manchester are homeowners: 49% of those aged between 65 and 74, 53% of those between 75 and 84 and 51% of people aged 85 and over. More recently for the Manchester City Council area, Figure 8.3 of the SHMA 2019 showed that 50% of the over 65s are home owners.

Planning Policy and Performance

Local Plan/Core Strategy

- 2.9 The Manchester City Council Core Strategy, adopted July 2012, is the current statutory development plan for the MCC area and sets out the strategic policies for development and conservation of the district up to 2027. MCC has started working towards a new Local Plan for the district. According to MCC’s website ¹¹, the Issues Consultation closed on 1st May 2020 and MCC is now drafting its new Local Plan. Alongside this, MCC is part of the Greater Manchester Spatial Framework (GMSF) for which an overarching revised draft ‘Greater Manchester’s Plan for Homes, Jobs, and the Environment’ (2019) has been published relating to all 10 Greater Manchester authorities.
- 2.10 The Core Strategy seeks to maximise the provision of a diverse range of homes for all income groups at sustainable locations. Strategic Objective 3 puts the focus on
- “Providing for a significant increase in high quality housing provision at sustainable locations throughout the City, to both address demographic needs and to support economic growth. The emphasis will be on providing a good range of high quality housing, (in terms of size, type, tenure, accessibility and price) including affordable housing across the City; to create sustainable lifetime neighbourhoods with high quality environments, good local facilities and with easy access to employment opportunities.”¹²*
- 2.11 It identifies that an annual average of 3,333 new homes is required in MCC during the period 2012 to 2027¹³ with 5% of new homes to be allocated to South Manchester, the area

⁹ Section 1 Living Longer Living Better 2014-20

¹⁰ Section 2 Living Longer Living Better 2014-20

¹¹ 11th September 2020 https://secure.manchester.gov.uk/info/200074/planning/6572/local_plan/2

¹² P29 Core Strategy 2012 to 2027 MCC

¹³ P97 Policy H1: Overall Housing Provision Core Strategy 2012 to 2027 MCC

within which Didsbury is located¹⁴. The Issues Consultation notes that the GMSF proposes 54,530 new homes over the next 15 years, of which 27% will be in MCC area¹⁵.

Consideration of Older People in Current and Emerging Planning Policy

Core Strategy 2012-2027

- 2.12 **The current Core Strategy recognises that older people are an important group whose needs should be planned for.** It acknowledges that *“There is a shortage of housing for elderly and disabled people. The number of elderly people is growing and there is likely to be a disproportionate increase in the number of disabled people as the population becomes older¹⁶”*.
- 2.13 Policy H1: overall housing provision, states that proposals for new residential development should *“Contribute to creating mixed communities by providing house types to meet the needs of a diverse and growing Manchester population, including elderly people¹⁷”* MCC welcomes proposals for accommodation for people with support needs, including older people, where this will contribute to the ‘vitality and viability’ of the neighbourhood without over-stressing services¹⁸. Within South Manchester, including Didsbury, the priority is for family and older persons housing outside the District Centre¹⁹.
- 2.14 The Issues Consultation recognises the challenge of ensuring that policies respond to Manchester’s ‘age friendly’ agenda²⁰ and that the current strategy ‘Manchester: A Great Place to Grow Older’ will provide a foundation for this.
- 2.15 The GMSF draft Plan references the Greater Manchester Strategy where the vision for Manchester is as *“a place where people live healthy lives and older people are valued²¹”* It identifies that *“the ageing population will necessitate a renewed emphasis on ensuring that a diverse range of housing is available to meet the needs of older people and households”* including improved *“options for those who would like to move, perhaps to a dwelling of a more appropriate size in a location that enables them to easily access local services and facilities²²”*. It notes that this could have the additional benefit of freeing up under-occupied family housing²³.

¹⁴ P113 Policy H6: South Manchester Core Strategy 2012 to 2027 MCC

¹⁵ Para 2.9 Local Plan Issues Consultation MCC 2020

¹⁶ Para 9.8 Core Strategy 2012-2027 MCC

¹⁷ P99, Policy H1 Overall Housing Provision - Core Strategy 2012 to 2027 MCC

¹⁸ Para 9.29 and Policy H10: Housing for People with additional support needs - Core Strategy 2012 to 2027 MCC

¹⁹ Policy H6 South Manchester - Core Strategy 2012 to 2027 MCC

²⁰ 5.19 Local Plan Issues Consultation MCC 2020

²¹ Para 3.1 revised draft Greater Manchester’s Plan for Homes, Jobs, and the Environment GMSF (2019)

²² Para 7.25 revised draft Greater Manchester’s Plan for Homes, Jobs, and the Environment GMSF (2019)

²³ Para 7.25 revised draft Greater Manchester’s Plan for Homes, Jobs, and the Environment GMSF (2019)

Manchester City Council Residential Growth Strategy 2016-25

- 2.16 One of the key objectives of the Residential Growth Strategy is to Provide Appropriate Housing Options for Retirement Living²⁴. This strategy objective focusses on extra care retirement housing whose benefits include *“increased health and quality of life benefits through better quality purpose built modern energy efficient homes, with greater opportunities for social and community participation, flexible and reduced care costs through efficient commissioning and delivery, supporting continued independence and at the same time release quality family homes²⁵”*. Whilst these benefits are quoted for extra care many of them can equally be derived from retirement housing provision such as is proposed at Didsbury.
- 2.17 An open market sheltered scheme, providing self-contained, independent accommodation in Didsbury, a settlement recognised by the Council as a location suitable for housing growth can assist in delivering both the current and emerging Local Plan objectives and policies.

Manchester City Council Local Plan Authority Monitoring Report (AMR) 2017/18

- 2.18 The AMR reports 2,986 net housing completions for the monitoring year 2017/18²⁶ - significantly fewer than the original Core Strategy annual requirement of 3,333, although it is noted that this level of growth is the highest annual growth since 2007/08²⁷. Just under 200 of the completions were in South Manchester²⁸.
- 2.19 As no Core Strategy indicators were set or monitored with specific reference to delivery of housing for older people, it is not possible to evaluate the effectiveness to date of the Council’s ambitions to encourage housing for older people.

Local Housing Priorities

Our Manchester A Housing Strategy 2016-21

- 2.20 The Housing Strategy includes a section on Living Longer, Living Better: Housing For An Age Friendly Manchester. This states that *“we have to prepare for the future growth in the older population who need a wider choice of housing so we can provide an offer that allows them to age in place close to families and communities and with care available close by²⁹”*.
- 2.21 Growth 1 New Homes Goals for 2021 aims to have a wide choice of homes for older households from the starting point that *“we have a shortage of homes that support people's independence (and) the number of older households is growing - we do not have a sufficiently varied and attractive choice of homes for them for the future³⁰”*

²⁴ P4 para 1.2 Residential Growth Strategy 2017

²⁵ P35 Residential Growth Strategy 2017

²⁶ P15 AMR 2017/18 MCC

²⁷ P15 AMR 2017/18 MCC

²⁸ P16 from graph AMR 2017/18 MCC

²⁹ P9 MCC A Housing Strategy 2016–2021

³⁰ P16 MCC A Housing Strategy 2016–2021

- 2.22 In terms of contributing to health and wellbeing the policy goal for 2021 is to be *“well prepared to meet the needs of a growing older population that will have more complex health issues. We need to have sufficient accommodation to support residents to maintain their independence³¹”*. The document goes on to comment that *“in the future there will be a greater number of older people living longer who will need extra care housing and we need to better understand the role that sheltered housing can play in meeting the needs of older people³²”*. The action is *“to provide additional extra care homes and ensure that the best use is made of sheltered housing in the city³³”*.
- 2.23 Under the policy section Making Best Use Of Our Homes the 2021 goal is to *“have enough properties designed for older people that have created an aspirational offer to encourage them to move to homes where they can keep their independence for longer³⁴”*. The proposed action is *“to provide a wider choice of cross tenure aspirational housing for older people to support positive choices for older age and support this with effective housing, care and financial options advice for older people³⁵”*.

Greater Manchester Strategic Housing Market Assessment (SHMA) 2019

- 2.24 The SHMA 2019, comments that by 2035 nearly three in twenty of Greater Manchester's residents will be 75 years or older and one in 20 will be 85 or older³⁶. It recognises that the majority of over 65s tend to be homeowners and the majority own their home outright³⁷.
- 2.25 The Housing LIN model has been used to provide estimates of potential demand for sheltered and retirement housing by 2035. These point to a shortfall of just over 7800 units in the GM area by 2035. All districts require more sheltered units for lease with over 1600 units needed in Manchester³⁸.
- 2.26 **The SHMA presents clear evidence that housing demand among older people is high, particularly for home ownership.**

Manchester Joint Health and Wellbeing Strategy 2016 Refresh

- 2.27 The most recent refresh of the Health and Wellbeing Strategy was produced in 2016. A 2019 update was anticipated but we have not been able to find any details of this document. The 2016 Strategy produced by Manchester Health & Wellbeing Board (HWB) has a specific objective to enable to keep well and enabled to live independently as they grow older.

³¹ P30 MCC A Housing Strategy 2016–2021

³² P30 MCC A Housing Strategy 2016–2021

³³ P31 MCC A Housing Strategy 2016–2021

³⁴ P22 MCC A Housing Strategy 2016–2021

³⁵ P23 MCC A Housing Strategy 2016–2021

³⁶ P155 GM SHMA

³⁷ Para 6.11 GM SHMA

³⁸ Para 6.21 GM SHMA

- 2.28 The Strategy states that “*the City’s age friendly approach seeks to support healthy and active ageing*”. It recognises that specific groups of older people are at greater risk of social isolation and loneliness, dementia and falling with people living alone among the most vulnerable groups³⁹ The Strategy seeks to develop and support Age Friendly Neighbourhoods, including increasing the number of older people participating in activities that reduce the risk of falls as well as achieving a reduction social exclusion among older people⁴⁰. Although increasing access to retirement housing is not specifically mentioned in the Strategy, increased provision of this type of accommodation is proven to reduce the risk of falls as residents live in Age Friendly Apartments and the benefits of community interaction within the scheme are also proven to reduce isolation among residents.

Supply of Specialist Housing to Meet Need

Local Supply Available for Sale

- 2.28 Analysis of Rightmove data of specialist retirement properties available for sale in the wards being assessed, carried out on 15/09/2020, confirmed the findings of the SHMA and other sources that there is a limited choice available. 26 retirement properties were listed for sale within these wards:
- 19 x 1bed in price range £55,000 to £195,000
 - 7 x 2beds in price range £85,000 to £255,000
- 2.29 A search of the EAC on-line directory for specialist accommodation in these wards confirmed a disproportionately high level of social rented accommodation. 1,492 properties were listed, of which social rent accounted for at least 1,099 homes – 73.7% of the total supply. Full details of current retirement housing supply can be found in Appendix 2.

Conclusions

- 2.30 **The strategies and policies of Manchester City Council and its partners show awareness of the housing needs of older people as an issue of increasing importance. Policies recognise the need for more accommodation suitable for older home owners but focus on Extra Care without recognising the potential for Retirement Living specialist accommodation for home ownership to enable people to live longer healthier lives.**
- 2.31 **Despite a high level of owner occupation among older households and a preference to continue in home ownership, there is an oversupply of social rented sheltered accommodation and an undersupply of sheltered accommodation for home ownership.**
- 2.32 **The proposed development at the site on Spath Rd/Lancaster Rd will provide accommodation which is better suited to the needs of older people in Didsbury and can assist Manchester City Council in delivering on its priorities.** Accessible and built to high standards of insulation, the properties will reduce the risk of falls and isolation, and be less

³⁹ P18 Joint Health and Wellbeing Strategy 2026

⁴⁰ P20 Joint Health and Wellbeing Strategy 2026

costly to heat than older, larger homes, thereby helping to deliver affordable warmth. There is also potential for under occupied family housing to be released onto the market for larger households.

3. FORECASTING SPECIALIST HOUSING DEMAND IN THE DIDSBURY AREA

- 3.1 We have modelled potential demand for specialist retirement housing in Didsbury based on the wards of Didsbury East, Didsbury West, Withington, Old Moat, Chorlton, Chorlton Park, Whalley Range, Burnage and Northenden Wards using two different approaches: the Retirement Housing Group (RHG) Model and the Contact Consulting Model, both of which are recommended in “Housing in Later Life⁴¹”.

Selection of areas

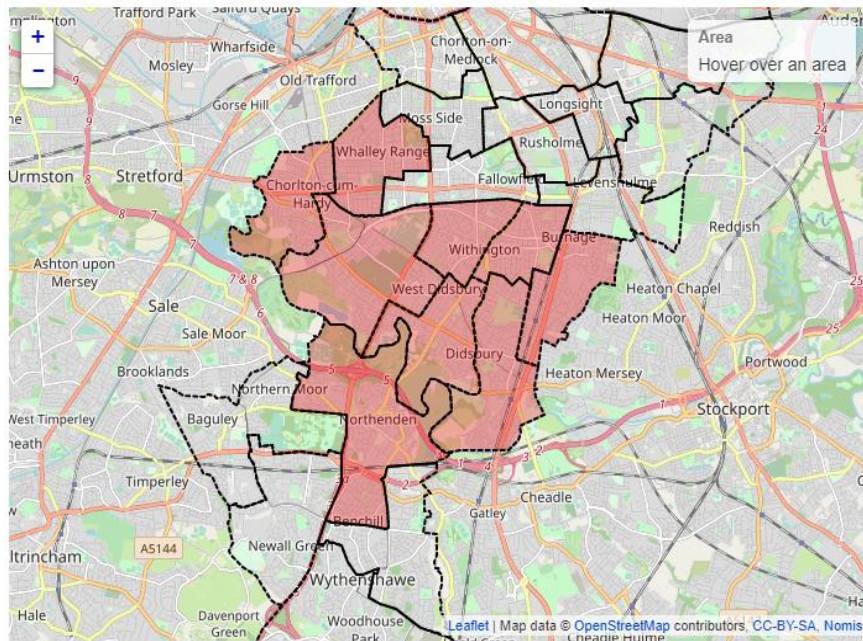


Figure 2 Extract from Nomis map showing Wards selected.

- 3.2 Currently in England an estimated **8% of households aged 65 and over live in specialist retirement housing (515,666 dwellings)**⁴². Research for the Housing Lin⁴³ suggests that, based on comparisons with the USA and Australia where the stock of older persons' housing is higher and those people who wish to live in specialist accommodation have a practical option to do so, the proportion of older person households moving into specialist retirement housing could be as high as 13-17%. Analysis of SHMA findings from surveys of over 13,500 households aged 50 plus suggests that around 20% of all older households would consider moving to specialist retirement housing if it was available.
- 3.3 A number of approaches exist which estimate demand for specialist housing for older people. Planning for the Right Homes in the Right Places⁴⁴ consulted on a proposed standard methodology for housing needs assessment at local authority level. Confirming that assessing the needs of older people will continue to be required, the consultation sought additional views on how this should be approached. Pending the introduction of a standard

⁴¹ Housing Lin <http://www.housinglin.org.uk/Topics/type/resource/?cid=8654>

⁴² Based on a comparison of the total number of specialist older persons housing units at July 2015 (Source EAC) with the total number of households aged 65 and over taken from Household projections England 2012 table 414 <https://www.gov.uk/government/statistical-data-sets/live-tables-on-household-projections>

⁴³ “Downsizing for older people into Specialist Accommodation” Janet Sutherland for Housing LIN February 2011

⁴⁴ DCLG, September 2017

methodology, the models described here are based on clear assumptions. The RHG model uses household data rather than population figures and so may be less likely to overstate demand. It makes a realistic assessment of demand for different tenures based on Census data on tenure among older people.

The RHG model

- 3.4 The RHG model is based on propensity to move. It assumes that 17.5 % of older person households (aged 75 and over) would live in retirement housing if it was available. Analysis of residents of McCarthy and Stone properties⁴⁵ shows that a small proportion (18%) of residents are aged under 75. If we assume that this is the normal age distribution for households living in retirement housing, and we compare the total number of households in each age group living in retirement housing with those living in the general housing stock, then an estimated 2.5% of households aged 65-74 would live in retirement housing if it was available in their area and their chosen tenure. The RHG model therefore assumes that 17.5% of households aged 75 and over and 2.5% of households aged 65-74 would live in retirement housing if it was available.
- 3.5 The RHG model analyses potential demand for specialist older persons' accommodation by tenure working on the assumption that social and private renters require affordable rented retirement housing and that home owners require outright sale or shared equity accommodation. ONS Census data from 2011 shows home ownership among households aged 65 and over in Manchester was 51%⁴⁶, lower than the national average of 75%⁴⁷. 50% of households aged 65-74 in Manchester are home owners. For households aged 75 and over the comparable figure is 52% (53% of households aged 75-84 and 51% of households aged 85 and over).
- 3.6 However in the Didsbury area itself the figures for home ownership are higher. In this case ONS Census data from 2011 shows home ownership among households aged 65 and over in the Didsbury area was 62%⁴⁸. 60% of households aged 65-74 in Didsbury area are home owners. For households aged 75 and over the comparable figure is 63% (63% of households aged 75-84 and 63% of households aged 85 and over).

The Contact Consulting Model

- 3.7 The Contact Consulting Model⁴⁹ is based on anticipated levels of care or support needs among older persons. Drawing on data relating to limiting long term illness (LLTI) and difficulty in performing personal care and household tasks, it establishes norms for people who have assessable support and care needs, estimating that 251 per thousand people aged

⁴⁵ Michael Ball: Housing Markets and Independence in Old Age fig 4.7

⁴⁶ DC4201EW - Tenure by ethnic group by age - Household Reference Persons – includes home owners with a mortgage

⁴⁷ DC4201EW - Tenure by ethnic group by age - Household Reference Persons

⁴⁸ DC4201EW - Tenure by ethnic group by age - Household Reference Persons – includes home owners with a mortgage

⁴⁹ Detailed information about how the model operates can be found in "Housing in Later Life"

75 and over would benefit from a move to specialised housing. The estimate of 251 persons per thousand population is then applied to households on the same basis (i.e. 25%)⁵⁰.

- 3.8 Care and support needs and the ability to manage LLTI conditions within this group will differ and requires a range of different solutions. This model provides a more detailed breakdown of demand by type of specialist housing required, distinguishing between:
- Sheltered housing for rent and sale
 - Enhanced sheltered housing for rent and sale
 - Extra Care housing for rent and sale
 - Dementia housing.
- 3.9 The proposed tenure split used in the Contact Consulting model for sheltered and Extra Care housing is 2:1 sale to rent; for enhanced sheltered it is 50:50 sale to rent. This tenure split is based on historic national norms for existing tenure of older persons living in general needs housing. We have undertaken the analysis using the figure of 63% home ownership among households aged 75 and over from the 2011 Census data.

Results from the RHG Model

- 3.10 Table 3.1 shows potential demand for specialist older persons' housing provision in Didsbury area using the RHG Model at 17.5% of older person households (aged 75+) and 2.5% of households aged 65-74. The table is based on projected household data for 2021 (the earliest date by which a McCarthy and Stone scheme in the Didsbury area is likely to be available). **1,064 existing households require specialist retirement housing.**

⁵⁰ The Contact Consulting model forms the basis for the Housing LIN/ADASS Strategic Housing for Older People (SHOP) Resource Pack and SHOP@ analysis tool produced by the Housing LIN and endorsed by the Department of Health

Table 3.1. RHG model potential demand for specialist older persons housing 2021

RHG MODEL @ 17.5% 2021				
Household age	Aged 65-74	Aged 75-84	Aged 85+	Total
No of households (Source DCLG household projections area 9)	5,536	3,691	1,598	10,824
Requiring specialist retirement housing	2.50%	17.5%	17.5%	
RHG model estimate of potential demand from existing households	138	646	280	1,064
Requiring home ownership - based on proportion of home owners in 2011 Census	60%	63%	63%	
RHG model estimate of demand for home ownership	83	409	176	668
Assume all under 75s and 72% of 75 and over require sheltered with support (1)	83	294	127	504
Current supply of sheltered for sale (EAC)				276
Requirement for newbuild sheltered for sale				228
Current supply of extra care & enhanced sheltered for sale (EAC)				60
Requirement for newbuild extra care for sale				104

Calculations are based on 2011 tenure splits by age. These are now somewhat historic, but it should be noted that home ownership is higher among households aged 50-64 yrs in 2011, today's 55-70 year olds and among those aged 65-74 in 2011 (now 71-80) than among the over 85s whom they are replacing, so the calculations likely understate potential demand for home ownership

Note 1: Contact Consulting percentage of households requiring Sheltered Housing

- 3.11 The 2011 Census for Manchester provides data on tenure by age. We have used this data at ward level to calculate the proportion of older person households requiring home ownership. It is therefore anticipated that of the 1,064 older person households who might require older persons housing, 668 households will require sale or shared equity housing. If the Contact Consulting split between sheltered and enhanced sheltered/Extra Care (72:28) for over 75s was applied to this figure then potential demand for sheltered housing for home ownership is 504 units.
- 3.12 Current supply of older persons accommodation in the Didsbury Area⁵¹ is 336 sale units (276 of which are housing with support and 60 housing with care), 57 housing with care market rent units and 1,099 social rented units (999 of which are housing with support and 100 housing with care). Total specialist older persons housing amounts to 1,492 units. The RHG model would suggest that **there is an overall shortfall of 228 sheltered for sale units including a requirement for shared equity.**

⁵¹ Based on EAC data for supply in the wards identified at para 3.1

Results from the Contact Consulting Model

- 3.13 We have used the Contact Consulting methodology as outlined in “Housing in later life” to provide an alternative estimate of potential demand for specialist housing for older people, including a more detailed estimate by type of specialist accommodation required. This looks at total population aged 75 and over and makes estimates of demand for a range of types of specialist housing based on frailty and inability to perform routine domestic and personal care tasks. It assumes that 251 persons per thousand will require specialist accommodation. When expressed as the same percentage of households (25%) this indicates demand for **1,327 units of specialist older persons accommodation.**
- 3.14 **Using 2011 Census data for Manchester** the Contact Consulting methodology suggests that there is potential demand for 601 units for sheltered housing for home ownership or shared equity purchase compared with current supply of 276 units: **a shortfall of 325 units** (see Table 3.3 below). There is potential demand for 150 units of Extra Care housing for home ownership or shared equity purchase, plus 67 units of enhanced sheltered housing for sale or share equity purchase, compared with current supply of 60 units: **a combined shortfall of 157 units** (see Table 3.3 below). There is a surplus of sheltered housing for rent.

Table 3.2. Contact Consulting Model: Potential demand for older persons accommodation – household based estimate using 2011 Census tenure patterns

		Current provision	Increase or decrease required	Target number of units required	Target provision per 1k households
					1,327
Sheltered	Rent	999	-648	351	66
	Sale/SE	276	325	601	114
Enhanced Sheltered	Rent	0	39	39	7
	Sale/SE	54	13	67	13
Extra Care	Rent	100	-12	88	17
	Sale/SE	6	144	150	28
Dementia Housing		0	32	32	6
TOTAL		1,435		1,327	251

Conclusions

- 3.15 We have appraised potential demand for specialist retirement housing using two alternative models, one of which is driven by the scale of potential need from persons who would potentially benefit from a move to specialised housing, the other looking at propensity to move by age group.
- The RHG model suggests a need for **228** units of sheltered housing for sale or shared equity.
 - The Contact Consulting model points to a need for **325** units of sheltered housing using the 2011 Census tenure split for Didsbury.

APPENDIX 1 GLOSSARY

This appendix describes the different forms of retirement housing which are currently available, either as historic provision or new/emerging forms of provision.

Models of housing for older people

Retirement Housing is used to describe all forms of specialised housing for older people, including sheltered and Extra Care, provided for sale or rent.

Sheltered housing is a form of housing intended for older people. It was developed in one of two styles: “Category Two” Sheltered Housing consisted of flats and/or bungalows with enclosed access, a communal lounge and some other limited communal facilities such as a shared laundry and a guest room. Support was provided by one or more “wardens” who were normally resident on site. “Category One” Sheltered Housing has many of the same features but might not have enclosed access, might have more limited communal facilities and would not normally have a resident warden. This model has evolved over time and approaches to providing support are now more varied.

Very sheltered housing is a term now largely disappearing from use and first used in the mid to late 1980s to describe sheltered schemes that sought to offer some access to care services and some additional social and care facilities.

Enhanced sheltered housing is the term that has largely replaced Very Sheltered Housing to describe sheltered housing that provides more in facilities and services than traditional sheltered housing but less than in an Extra Care Housing Scheme.

Retirement Living is a variant of the Sheltered Housing model, incorporating all the key features of the model and offered for leasehold sale by McCarthy & Stone Ltd. It includes high standards of design and accessibility in individual apartments and in communal areas with generous space standards. Onsite support from a house manager is available during office hours, backed up by a 24-hour monitored emergency call system for residents.

Extra Care Housing is the term used for a complex of specialised housing for older people which is designed to be accessible and provides a range of “lifestyle” facilities that cover the provision of care, support, domestic, social, community or other services. Care services are provided in a style that can respond flexibly to increasing need. In most Extra Care Housing schemes people move into their own self-contained accommodation (where they have security of tenure) and care services are delivered into that unit as a resident's needs increase. The McCarthy & Stone Retirement Living Plus product is a form of Extra Care Housing. A member of staff is available on site to provide support twenty-four hours a day every day of the week. A restaurant offers residents a daily main meal and can offer catering support to those who need it in their own apartments.

Continuing Care Retirement Community is a variant of the Extra Care Housing model in which higher levels of care are generally delivered by transfer within the scheme from an independent

living unit in which low to moderate care is delivered into a specialist unit or care home. This pattern is sometimes referred to as the “campus” model of Extra Care.

Registered Care Home is the form of institutional provision that in the past would have been referred to as either a “Residential Care Home” or a “Nursing Home”. All are now referred to as “Registered Care Homes” and differentiated as either “Registered Care Home providing personal care” or as a “Registered Care Home providing nursing care”.

Other technical terms

Bedroom standard – the number of bedrooms required for a household, taking into account age, gender and family relationships.

Decent Homes Standard – a minimum standard for the condition of existing social housing. To meet the standard a dwelling must achieve all of the following:

- be above the legal minimum standard for housing, and
- be in a reasonable state of repair, and
- have reasonably modern facilities (such as kitchens and bathrooms) and services, and
- provide a reasonable degree of thermal comfort (effective insulation and efficient heating).

HEDNA/ Housing and Economic Development Assessment – introduced into NPPG in March 2015, the HEDNA brings together objective assessment and evidence of development needs for housing (both market and affordable); and economic development (which includes main town centre uses). The HEDNA includes the Strategic Housing Market Assessment requirement as set out in the National Planning Policy Framework.

HHSRS/ Health and Housing Safety Rating System – a risk assessment tool used to assess potential risks to the health and safety of occupants in residential properties in England and Wales. It came into effect in 2006 and replaces the Housing Fitness Standard.

JSNA/Joint Strategic Needs Assessment – strategic assessment of the health, care and wellbeing needs of a local population used to inform the direction of service delivery. Production of a JSNA is a statutory responsibility of the Directors of Adult Social Services and Children's Services and the Director of Public Health.

NPPF/ National Planning Policy Framework – government requirements that should be observed by local authorities when developing planning policy.

NPPG/ National Planning Policy Guidance – Government guidance designed to assist local planning policy development.

Vulnerable households – defined in the English Housing Survey 2010 as households in receipt of at least one of the principal means tested or disability related benefits.

SAP/ Standard Assessment Procedure – the government’s rating for energy efficiency on a scale of 1 (poor) to 100 (excellent).

SHMA/Strategic Housing Market Assessment – an assessment of housing need and demand across all tenures within a housing market (often spanning several local authority areas) which can inform the development of local housing and planning policies. Particular consideration is to be given in the SHMA to the housing needs of specific groups including older people.

APPENDIX 2: STOCK OF SPECIALIST OLDER PERSONS HOUSING – 07/09/2020

Type	Scheme name	Town	Postcode	No of dwg	Type	Tenure	
Age Exclusive	Manor Court	Chorlton	M21 7JU	33	2 bed flats	Leasehold	
Age Exclusive	Minehead Development	Withington	M20 1EP	32	1 & 2 bed flats	Leasehold	
Age Exclusive	Oakwood House	Chorlton	M21 8XW	21	1, 2 & 3 bed flats	Leasehold	
Age Exclusive	Cargreen Close/ Burnage Lane	Burnage	M19 1LT	28	1 & 2 bed flats	Leasehold	
Age Exclusive	Ferguson Court	Burnage	M19 2HS	34	1 & 2 bed flats	Leasehold	
			Leasehold	148	dwelling		5 schemes
Age Exclusive	The Rossett	Didsbury	M20 3YA	6	1 bed flats	Social landlord	
Age Exclusive	Brookside	Didsbury	M20 2UE	48	1 & 2 bed flats	Social landlord	
Age Exclusive	Chatham Court	Didsbury	M20 1HR	22	1 bed flats	Social landlord	
Age Exclusive	Ambrose Court	Northenden	M22 4EH	8	2 bed flats	Social landlord	
Age Exclusive	Dermot Murphy Close	Withington	M20 1FQ	44	1 bed flats	Social landlord	
Age Exclusive	Minehead Development	Withington	M20 1EP	32	1 & 2 bed flats	Social landlord	
Age Exclusive	Bradgate Close	Northenden	M22 4LX	8	2 bed flats	Social landlord	
Age Exclusive	Milton Court	Burnage	M19 1RX	26	1 & 2 bed flats	Social landlord	
Age Exclusive	The Forge	Withington	M20 4PL	6	1 & 2 bed flats	Social landlord	
Age Exclusive	Robert Owen Gardens	Northenden	M22 4DD	12	1 & 2 bed flats	Social landlord	
Age Exclusive	Hutton Lodge		M20 3NA	28	1 & 2 bed flats	Social landlord	
Age Exclusive	Thelwall Court	Fallowfield	M14 7EP	10	1 bed flats	Social landlord	
Age Exclusive	Hyde Fold House	Burnage	M19 1EB	8	2 bed flats	Social landlord	
Age Exclusive	Avon Road	Burnage	M19 1FW	10	2 bed bungalows	Social landlord	
Age Exclusive	Lincoln Minshull House	Northern Moor	M23 0NB	14	1 bed flats	Social landlord	
Age Exclusive	Menzies Court	Chorlton	M21 9GA	20	1 & 2 bed flats	Social landlord	
Age Exclusive	Oak Court	Whalley Range	M16 8FZ	16	1 bed flats	Social landlord	
			Social Landlord	318	dwelling		17 schemes
			Total Age Exclusive	466	dwelling		22 schemes
Retirement housing	Guardian Close	Didsbury	M20 2TP	6	2 bed flats	Leasehold	
Retirement housing	Victoria Grange	Didsbury	M20 2TS	23	2 bed flats	Leasehold	
Retirement housing	Barfield House	Didsbury	M20 2BX	21	1 & 2 bed flats	Leasehold	
Retirement housing	Souchay Court	Didsbury	M20 6BR	37	1 & 2 bed flats	Leasehold	
Retirement housing	Redwood House	Northenden	M22 4NT	26	1 & 2 bed flats	Leasehold	
Retirement housing	Lomas Close & Lavister Avenue	Burnage	M19 1TE	33	1/2 bed flats/bungalows	Leasehold	
Retirement housing	Oak Court	Withington	M20 4NE	37	1 & 2 bed flats	Leasehold	
Retirement housing	Cosgrove Hall Court	Chorlton-cum-Hardy	M21 0BA	47	1 & 2 bed flats	Leasehold	
Retirement housing	Ryland House	Chorlton	M21 9JP	46	1 & 2 bed flats	Leasehold	
			Leasehold	276	dwelling		9 schemes
Retirement housing	Parkfield Court	Didsbury	M20 2GE	57	1 & 2 bed flats	Market Rent	
			Market Rent	57	dwelling		1 scheme
Retirement housing	Broomfield Court	Didsbury	M20 2TS	26	1 & 2 bed flats	Social landlord	
Retirement housing	Berkeley Court	Didsbury	M20 2PR	46	1 & 2 bed flats	Social landlord	
Retirement housing	Grove Lane	Didsbury	M20 6UF	26	1 & 2 bed flats	Social landlord	
Retirement housing	Holt House	Didsbury	M20 2TG	12	1 & 2 bed flats	Social landlord	
Retirement housing	Digby Lodge	Didsbury	M20 6AP	48	1 bed flats	Social landlord	
Retirement housing	Jack Edwards Court	Didsbury	M20 2NT	25	1 & 2 bed flats	Social landlord	
Retirement housing	Le Bas House	Withington	M20 1HJ	47	1 bed flats	Social landlord	
Retirement housing	Carron House	Northenden	M22 4NG	45	1 bed flats	Social landlord	
Retirement housing	Lee Court	Northenden	M22 4HZ	40	1 bed flats	Social landlord	
Retirement housing	Moorside		M22 4DD	36	1 bed flats	Social landlord	
Retirement housing	Sycamore Close	Withington	M20 4PH	35	1 & 2 bed flats	Social landlord	
Retirement housing	Mitford Court	Fallowfield	M14 6WD	24	1 bed flats	Social landlord	
Retirement housing	Mayes Court	Withington	M14 6UD	40	1 bed flats	Social landlord	
Retirement housing	Alfred Morris Court	Northern Moor	M23 0EX	30	1 bed flats	Social landlord	
Retirement housing	Rowan Court	Ladybarn	M14 6TN	44	1 & 2 bed flats	Social landlord	
Retirement housing	Royle Court	Fallowfield	M14 6RP	41	1 & 2 bed flats	Social landlord	
Retirement housing	Arden Court	Chorlton	M21 8EW	76	1 & 2 bed flats	Social landlord	
Retirement housing	Hanover House	Fallowfield	M14 6YL	12	2 bed flats	Social landlord	
Retirement housing	Cheshire Gardens	Fallowfield	M14 7DD	28	1 & 2 bed flats	Social landlord	
Retirement housing	Oaklands House	Fallowfield	M14 6JW	31	1 bed flats	Social landlord	
Retirement housing	Holland Court	Chorlton-cum-Hardy	M21 8BF	21	1 & 2 bed flats	Social landlord	
Retirement housing	Ivy Court	Chorlton	M21 9FL	41	1 & 2 bed flats	Social landlord	
Retirement housing	Adastral House	Chorlton	M21 0UD	29	1 bed flats	Social landlord	
Retirement housing	Trafalgar Court	Whalley Range	M16 8JW	31	1 & 2 bed flats	Social landlord	
Retirement housing	Brook Court	Chorlton	M21 9DG	24	1 & 2 bed flats	Social landlord	
Retirement housing	Goodwood Lodge	Whalley Range	M16 8GD	7	1 bed flats	Social landlord	
Retirement housing	McClaren Court	Chorlton	M21 9RD	27	1 bed flats	Social landlord	
Retirement housing	Tangmere Court	Whalley Range	M16 8DF	38	1 & 2 bed flats	Social landlord	
Retirement housing	Egerton Court	Chorlton	M21 9HF	36	1 bed flats	Social landlord	
Retirement housing	Alderfield House	Chorlton-cum-Hardy	M21 9HJ	33	1 & 2 bed flats	Social landlord	
			Social Landlord	999	dwelling		30 schemes
			Total Retirement Housing	1,332	dwelling		40 schemes
Enhanced Sheltered	Boat Lane Court	Northenden	M22 4EZ	54	1 & 2 bed flats	Leasehold	
Extracare	Belong Morris Feinmann	Didsbury	M20 2UW	6	1 & 2 bed flats	Leasehold	
			Leasehold	60	dwelling		2 schemes
Extracare	Belong Morris Feinmann	Didsbury	M20 2UW	7	1 & 2 bed flats	Social landlord	
Extracare	Burnage Lane extracare scheme	Burnage	M19 1LE	56	1 & 2 bed flats	Social landlord	
Extracare	Hibiscus Court	Whalley Range	M16 7HU	37	1 bed flats	Social landlord	
			Social landlord	100	dwelling		3 schemes
			Enhanced sheltered/ Extracare total	160	dwelling		5 schemes