



Housing LIN

*Connecting people, ideas and resources*

# Assessment of need for housing and accommodation for older people in Epping Forest District to 2033

For Epping Forest District Council

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Housing Learning & Improvement Network

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## 1. Introduction

- 1.01 This is a report from the Housing Learning and Improvement Network (Housing LIN)<sup>1</sup> in response to a brief from Epping Forest District Council (EFDC).
- 1.02 EFDC has commissioned the Housing LIN 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, to support the implementation of EFDC's emerging Local Plan, be a material consideration in determining planning applications and support the Council's Housing Strategy.
- 1.03 This report covers:
- 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 (including estimates to 2037).

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<sup>1</sup> [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 CIPFA Nearest Neighbours model.<sup>2</sup>
- 2.03 Using 2018-based ONS household population projections<sup>3</sup>, the populations for Epping Forest District and its CIPFA comparators have been projected for the years 2021, 2023, 2027, 2033 and 2037.
- 2.04 Tables 1 and 3 show the household population projections for Epping Forest District and its CIPFA 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+ household populations respectively.

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<sup>2</sup> Chartered Institute of Public Finance and Accounting – Nearest Neighbours model:

<https://www.cipfa.org/services/cipfastats/nearest-neighbour-model>

<sup>3</sup> ONS 2018-based household projections for England: detailed data for modelling and analysis

Table 1. 65+ household population projections, for Epping Forest District and its comparators, projected from 2021 to 2037.

Authority	65+ household population projections				
	2021	2023	2027	2033	2037
<b>Epping Forest District</b>	<b>25,524</b>	<b>26,175</b>	<b>27,984</b>	<b>31,228</b>	<b>32,974</b>
Brentwood	14,992	15,114	15,756	16,995	17,509
East Hampshire	28,577	29,899	32,592	36,510	38,353
East Hertfordshire	27,331	28,496	31,328	36,050	38,394
Horsham	32,913	34,472	38,063	43,943	46,739
Mid Sussex	30,693	31,640	34,085	38,371	40,636
North Hertfordshire	25,228	25,987	27,887	31,118	32,588
Reigate and Banstead	25,999	26,821	28,893	32,655	34,572
Sevenoaks	25,668	26,224	27,628	30,211	31,350
South Oxfordshire	29,863	30,857	33,151	36,852	38,805
Test Valley	27,352	28,443	30,772	34,458	36,171
Three Rivers	16,670	17,062	18,079	19,926	20,901
Tonbridge and Malling	24,983	25,939	28,201	32,123	34,247
Vale of White Horse	27,525	28,714	31,575	35,879	38,163
West Oxfordshire	24,077	25,143	27,650	31,538	33,427
Winchester	26,393	27,469	29,732	33,546	35,290
<b>Comparator Average</b>	<b>25,862</b>	<b>26,779</b>	<b>28,961</b>	<b>32,588</b>	<b>34,382</b>
<b>England</b>	<b>10,293,647</b>	<b>10,648,462</b>	<b>11,495,081</b>	<b>12,913,300</b>	<b>13,643,957</b>

Source: ONS 2018-based household population projections for England

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

Authority	% changes in 65+ household population projections compared with 2021			
	2023	2027	2033	2037
<b>Epping Forest District</b>	<b>2.6%</b>	<b>9.6%</b>	<b>22.4%</b>	<b>29.2%</b>
Brentwood	0.8%	5.1%	13.4%	16.8%
East Hampshire	4.6%	14.1%	27.8%	34.2%
East Hertfordshire	4.3%	14.6%	31.9%	40.5%
Horsham	4.7%	15.6%	33.5%	42.0%
Mid Sussex	3.1%	11.1%	25.0%	32.4%
North Hertfordshire	3.0%	10.5%	23.3%	29.2%
Reigate and Banstead	3.2%	11.1%	25.6%	33.0%
Sevenoaks	2.2%	7.6%	17.7%	22.1%
South Oxfordshire	3.3%	11.0%	23.4%	29.9%
Test Valley	4.0%	12.5%	26.0%	32.2%
Three Rivers	2.4%	8.5%	19.5%	25.4%
Tonbridge and Malling	3.8%	12.9%	28.6%	37.1%
Vale of White Horse	4.3%	14.7%	30.4%	38.6%
West Oxfordshire	4.4%	14.8%	31.0%	38.8%
Winchester	4.1%	12.7%	27.1%	33.7%
<b>Comparator Average</b>	<b>3.5%</b>	<b>12.0%</b>	<b>26.0%</b>	<b>32.9%</b>
<b>England</b>	<b>3.4%</b>	<b>11.7%</b>	<b>25.4%</b>	<b>25.4%</b>

Source: ONS 2018-based household population projections for England

Table 3. 75+ household population projection for Epping Forest District and its comparators, projected to 2037.

Authority	75+ household population projections				
	2021	2023	2027	2033	2037
<b>Epping Forest District</b>	<b>12,102</b>	<b>13,081</b>	<b>13,837</b>	<b>14,996</b>	<b>16,244</b>
Brentwood	7,310	7,792	7,956	8,279	8,813
East Hampshire	13,555	15,172	16,876	18,739	20,245
East Hertfordshire	12,652	13,986	15,247	17,040	18,774
Horsham	15,537	17,184	19,096	21,521	23,660
Mid Sussex	14,489	15,995	17,492	19,139	20,502
North Hertfordshire	11,988	13,011	14,067	15,322	16,508
Reigate and Banstead	12,023	13,106	14,198	15,492	16,802
Sevenoaks	12,188	13,333	14,320	15,126	15,948
South Oxfordshire	14,674	16,103	17,513	18,950	20,265
Test Valley	12,891	14,387	15,899	17,367	18,654
Three Rivers	7,842	8,436	8,966	9,620	10,334
Tonbridge and Malling	11,791	13,003	13,929	15,159	16,521
Vale of White Horse	12,985	14,396	16,028	17,891	19,601
West Oxfordshire	11,439	12,668	14,127	15,780	17,311
Winchester	12,622	13,890	15,302	16,912	18,236
<b>Comparator Average</b>	<b>12,256</b>	<b>14,075</b>	<b>15,381</b>	<b>16,742</b>	<b>17,401</b>
<b>England</b>	<b>4,562,693</b>	<b>5,109,057</b>	<b>5,559,218</b>	<b>6,117,955</b>	<b>6,638,491</b>

Source: ONS 2018-based household population projections for England

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

Local authority	% changes in 75+ household population projections compared to 2021			
	2023	2027	2033	2037
<b>Epping Forest District</b>	<b>8.1%</b>	<b>14.3%</b>	<b>23.9%</b>	<b>34.2%</b>
Brentwood	6.6%	8.8%	13.3%	20.6%
East Hampshire	11.9%	24.5%	38.2%	49.4%
East Hertfordshire	10.5%	20.5%	34.7%	48.4%
Horsham	10.6%	22.9%	38.5%	52.3%
Mid Sussex	10.4%	20.7%	32.1%	41.5%
North Hertfordshire	8.5%	17.3%	27.8%	37.7%
Reigate and Banstead	9.0%	18.1%	28.9%	39.8%
Sevenoaks	9.4%	17.5%	24.1%	30.8%
South Oxfordshire	9.7%	19.3%	29.1%	38.1%
Test Valley	11.6%	23.3%	34.7%	44.7%
Three Rivers	7.6%	14.3%	22.7%	31.8%
Tonbridge and Malling	10.3%	18.1%	28.6%	40.1%
Vale of White Horse	10.9%	23.4%	37.8%	50.9%
West Oxfordshire	10.7%	23.5%	38.0%	51.3%
Winchester	10.0%	21.2%	34.0%	44.5%
<b>Comparator average</b>	<b>14.8%</b>	<b>25.5%</b>	<b>36.6%</b>	<b>42.0%</b>
<b>England</b>	<b>12.0%</b>	<b>21.8%</b>	<b>34.1%</b>	<b>45.5%</b>

Source: ONS 2018-based household population projections for England

- 2.05 In Epping Forest District, it is estimated that by 2033 there will be an increase of c.22% in the 65+ household population and a c.24% increase in the 75+ household population. By 2037 it is estimated that there will be an increase of c.29% in the projected 65+ household population and a c.34% increase in the projected 75+ household population.
- 2.06 In comparison to its CIPFA comparator average Epping Forest District has a lower percentage increase in the projected 75+ household population to 2033, 23.9% versus 36.6%. In relation to the 65+ household population to 2033, the difference between Epping Forest District and its the CIPFA comparator average is less pronounced, 22.4% versus 26%. Given that the extent of this variation is less significant amongst the 65+ household population, it is possible that Epping Forest District will experience a more significant growth in its 75+ household population post 2033.
- 2.07 Epping Forest District's household population for all age categories is projected to grow from approximately 131,695 people in 2021 to 136,762 people by 2033 and



138,197 people by 2037. This represents projected growth of the household population for all age categories of 3.9% to 2033 and 4.9% by 2037, relative to 2021. This is a significantly lower growth rate in relation to the projected growth for the 65+ and 75+ household populations.

2.08 The below table shows the household population up to and including age 64 compared to the 65+ household population for Epping Forest District and the percentage change for each household population relative to the 2021 household population. There is a significant projected increase in the 65+ household population to 2033 compared with a projected decrease in the 0-64 household population.

Table 5. Comparison of the household population projections aged up to and including age 64 with the 65+ household population for Epping Forest District.

Population: age category	2021	2023	2027	2033	2037
0-64 household population	106,171	106,578	106,499	105,534	105,223
0-64 (% change relative to 2021)	-	0.38%	0.31%	-0.60%	-0.89%
65+ household population	25,524	26,175	27,984	31,228	32,974
65+ (% change relative to 2021)	-	2.6%	9.6%	22.4%	29.2%

Source: ONS 2018-based household population projections

### Housing, health and social care context

2.09 Epping Forest District's average life expectancy at birth is 82.6 years<sup>4</sup>, 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<sup>5</sup>.

2.10 Epping Forest District's average life expectancy at age 65 is 20.4 years<sup>6</sup>, compared to 20.5 years for Essex and 20.2 years for England.

2.11 Table 6 below shows the number of older people, aged 65+ in Epping Forest District who have a long-term health problem or disability<sup>7</sup>. 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.

<sup>4</sup> Public Health England: [Public Health Outcomes Framework - Epping Forest District](#)

<sup>5</sup> ONS: 2020 National life tables – England

<sup>6</sup> Public Health England: [Public Health Outcomes Framework – Epping Forest District](#)

<sup>7</sup> ONS / Nomis 2011 UK census: [DC3201EW - Long-term health problem or disability by general health by ethnic group by sex by age](#)

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)

- 2.12 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.
- 2.13 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<sup>8</sup>, and an estimate of the prevalence of dementia within Epping Forest District<sup>9</sup>.
- 2.14 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.

<sup>8</sup> NHS Digital, Recorded Dementia Diagnoses publications, December 2020 – accessed via PHE: [Dementia Profile](#)

<sup>9</sup> Essex Local Authority Portraits (Essex JSNA 2016): A profile of people living in Epping Forest – April 2016; Essex County Council

### **Income and socioeconomic context**

- 2.15 At the most recent census, home ownership amongst 65+ households in Epping Forest District was 87.3%<sup>10</sup>, which is above the equivalent average English home ownership rate of 80%.
- 2.16 The Income Deprivation Affecting Older People Index (IDAOPI)<sup>11</sup> 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%.
- 2.17 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.
- 2.18 The rate of home ownership is high and above 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**

- 2.19 Data from the Elderly Accommodation Counsel's (EAC)<sup>12</sup> 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.
- 2.20 For residential and nursing care data from the Care Quality Commission<sup>13</sup> (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).
- 2.21 The following definitions of older people's housing are used to describe the different types of housing and accommodation for older people:

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<sup>10</sup> Office for National Statistics (2013). Tenure by occupation by age - Household Reference Persons. Nomis Table DC4604EW.

<sup>11</sup> Local Government Association: [IDAOPI score](#) – based on data from MHCLG

<sup>12</sup> Elderly Accommodation Counsel housing data (Q4 2019)

<sup>13</sup> CQC: Care Home Directory – April 2021

- **Housing for Older People (HfOP)**<sup>14</sup>: 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 management company that employ the scheme manager and organise maintenance and other services.
- **Housing with care (HwC)**<sup>15</sup>: (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**<sup>16</sup>: 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**<sup>17</sup>: 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.

2.22 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.

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<sup>14</sup> EAC - [HousingCare Glossary](#)

<sup>15</sup> <https://www.housinglin.org.uk/Topics/browse/HousingExtraCare/what-is-extra-care/>

<sup>16</sup> NHS: Care homes: <https://www.nhs.uk/conditions/social-care-and-support-guide/care-services-equipment-and-care-homes/care-homes/>

<sup>17</sup> 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	Total	Prev	Sale / shared ownership	Rent	Total	Prev
<b>Epping Forest District</b>	<b>480</b>	<b>783</b>	<b>1,263</b>	<b>49</b>	<b>60</b>	<b>60</b>	<b>120</b>	<b>10</b>
Brentwood	326	668	994	66	0	26	26	1
East Hampshire	835	702	1,537	54	56	0	56	6
East Hertfordshire	558	907	1,465	54	56	148	204	14
Horsham	1,197	991	2,188	66	11	202	213	11
Mid Sussex	927	884	1,811	59	56	86	142	20
North Hertfordshire	747	784	1,531	61	174	225	399	15
Reigate and Banstead	933	698	1,631	63	0	60	60	3
Sevenoaks	689	1,194	1,883	73	0	153	153	8
South Oxfordshire	713	737	1,450	49	113	120	233	11
Test Valley	629	409	1,038	38	155	90	245	13
Three Rivers	420	629	1,049	63	0	0	0	0
Tonbridge and Malling	535	487	1,022	41	51	183	234	16
Vale of White Horse	576	456	1,032	37	0	85	85	8
West Oxfordshire	713	273	986	41	120	44	164	14
Winchester	566	1,203	1,769	67	135	106	241	22
<b>Comparator Average</b>	<b>678</b>	<b>738</b>	<b>1,414</b>	<b>55</b>	<b>62</b>	<b>99</b>	<b>161</b>	<b>13</b>
<b>England</b>	<b>151,683</b>	<b>432,391</b>	<b>584,074</b>	<b>57</b>	<b>13,629</b>	<b>46,176</b>	<b>59,805</b>	<b>13</b>

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.

<b>Local Authority</b>	<b>Residential care (beds)</b>	<b>Prev</b>	<b>Nursing care (beds)</b>	<b>Prev</b>
<b>Epping Forest District</b>	<b>601</b>	<b>50</b>	<b>667</b>	<b>55</b>
Brentwood	348	14	414	16
East Hampshire	484	56	797	92
East Hertfordshire	338	24	726	52
Horsham	256	13	926	47
Mid Sussex	571	79	916	127
North Hertfordshire	677	25	491	18
Reigate and Banstead	764	33	984	43
Sevenoaks	546	28	485	25
South Oxfordshire	214	10	920	45
Test Valley	281	15	634	34
Three Rivers	288	15	356	19
Tonbridge and Malling	232	16	427	30
Vale of White Horse	263	25	946	88
West Oxfordshire	204	18	927	80
Winchester	487	44	728	65
<b>Comparator average</b>	<b>410</b>	<b>33</b>	<b>709</b>	<b>58</b>
<b>England total</b>	<b>188,439</b>	<b>41</b>	<b>203,769</b>	<b>45</b>

Source: Care Quality Commission (2021).

N.B. 'Prev' denotes the prevalence rate – the number of care bedspaces per 1,000 population 75+

2.23 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 its comparator authorities, and to the all-England average. However, it has an oversupply of housing for older people to 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. 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. This evidence is contextual and is provided as 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**

- 2.24 The 65+ population in Epping Forest District is projected to grow by approximately 22.4% by 2033 and 29.2% by 2037, compared with 26% and 32.9% respectively for its CIPFA comparator authorities (Table 2).
- 2.25 The 75+ population in Epping Forest District is projected to grow by approximately 23.9% by 2033 and 34.2% by 2037 compared to 36.6% and 42% respectively for its CIPFA comparators (Table 4).
- 2.26 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 2.09).
- 2.27 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).
- 2.28 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).
- 2.29 Home ownership is 87.3% in Epping Forest District, which is higher than the national home ownership rate (c.80%) (paragraph 2.15).
- 2.30 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 (paragraphs 2.16 and 2.17).

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

- 3.01 The Housing LIN's SHOP@<sup>18</sup> 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 refines the previous use of national generic 'benchmarks' to better estimate future housing and accommodation need at local authority level.

#### **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 2018-based household population data is used to identify relevant older populations in Epping Forest District<sup>19</sup>. 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+ household population as the average age benchmark in relation to the need for housing with care, residential care and nursing care.
  - The 65+ household 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).

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<sup>18</sup> [www.housinglin.org.uk/SHOP](http://www.housinglin.org.uk/SHOP)

<sup>19</sup> ONS 2018-based household projections for England: detailed data for modelling and analysis



- 3.06 Over 85% of households headed by a person aged 65+ in Epping Forest District are homeowners. 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 higher home ownership rate compared to 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.85% of future need for specialist housing for older people will be for owner occupation, including outright ownership/shared ownership options for older people.
- 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, typically on the basis of 50% social affordable rent and 50% for ownership/shared ownership.
- 3.09 In terms of the health and social care profile of the older population in Epping Forest District, evidence indicates that average life expectancy is in line with the average for London 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 similar to 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<sup>20</sup> 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<sup>21</sup> 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)<sup>22</sup> states that older people are living for longer and are healthier.

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<sup>20</sup> Essex County Council Housing Strategy: Draft Consultation Summary Document 2020

<sup>21</sup> Epping Forest District Council: Housing Strategy 2017-2022

<sup>22</sup> 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 (i.e. 'downsizing'/'rightsizing') to types of housing/accommodation designated for older people is an influencing factor in estimating need for housing/accommodation: the Housing LIN has drawn on qualitative<sup>23</sup> and quantitative research it has conducted with people aged over-60 over the last three years<sup>24</sup>. 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.
  - Based on the Housing LIN's research, c.30% of older people aged 65+ are typically interested in and willing to 'downsize'/'rightsize' and move to specialist housing and accommodation for older people. The evidence from this research suggests that of those older people expressing an interest in moving:
    - 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), followed by housing with care (extra care housing).
    - c.50% are interested in moving to 'age friendly' housing that meets age related needs but is not age-designated housing.
  - 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

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<sup>23</sup> Housing LIN qualitative research with over 400 older people: focus groups, 1:1 interviews and residents' forums consulted in order to obtain the views of older people with respect to their preferences and needs related to specialist housing, adaptations and later life.

<sup>24</sup> Housing LIN quantitative research: approximately 1,200 survey responses completed by people aged over-60 about their preferences for specialist housing and accommodation for older people.

Neighbour' comparator authorities<sup>25</sup>, 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	49
CIPFA comparator average	55
England	57

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	50	55
Comparator average	33	58
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

<sup>25</sup> <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 2.21) these assumptions are summarised below:

- Housing for Older People:

Need is likely to increase as a consequence of: an increase in the 65+ household population (tables 1 and 2); relative undersupply of housing for older people for sale (table 8), in the context of over 85% home ownership amongst 65+ households (para 2.15); 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+ household 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 3.10); 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+ household population (tables 3 and 4); increasing prevalence of dementia related needs amongst the 65+ household 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<sup>26</sup>, based on population data from the ONS 2018-based household 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 3.06 - 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 2021 current provision.

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

<b>Housing/accommodation type</b>	<b>2021 current provision (units / beds)</b>	<b>2021 prevalence rate</b>	<b>2037 anticipated prevalence rate</b>	<b>2037 estimated need</b>	<b>Net need (units)</b>
Housing for Older People	1,263	49	55	c.1,810	c.550
Housing with Care	120	10	17	c.280	c.160
Residential care	601	50	41	c.670	c.70
Nursing care	667	55	56	c.910	c.240

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.

<sup>26</sup> 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.1,330	c.1,460	c.1,670	c.1,810
Housing with Care (units)	c.150	c.190	c.230	c.280
Residential care (bedspaces)	c.610	c.620	c.640	c.670
Nursing care (bedspaces)	c.730	c.770	c.840	c.910

N.B. 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.70	c.200	c.410	c.550
<i>For rent</i>	<i>c.10</i>	<i>c.30</i>	<i>c.60</i>	<i>c.80</i>
<i>For sale / shared ownership</i>	<i>c.60</i>	<i>c.170</i>	<i>c.350</i>	<i>c.470</i>
Housing with Care (units)	c.30	c.70	c.110	c.160
<i>For rent</i>	<i>c.15</i>	<i>c.35</i>	<i>c.55</i>	<i>c.80</i>
<i>For sale / shared ownership</i>	<i>c.15</i>	<i>c.35</i>	<i>c.55</i>	<i>c.80</i>
Residential care (beds)	c.10	c.20	c.40	c.70
Nursing care (beds)	c.60	c.100	c.170	c.240

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.410 units: <ul style="list-style-type: none"> <li>c.60 for social/affordable rent</li> <li>c.350 for sale</li> </ul>	c.550 units: <ul style="list-style-type: none"> <li>c.80 for social/affordable rent</li> <li>c.470 for sale</li> </ul>
Housing with care (extra care housing). Use class C3/C2	c.110 units: <ul style="list-style-type: none"> <li>c.55 for social/affordable rent</li> <li>c.55 for sale</li> </ul>	c.160 units: <ul style="list-style-type: none"> <li>c.80 for social/affordable rent</li> <li>c.80 for sale</li> </ul>
Residential care. Use class C2	c.40 bedspaces	c.70 bedspaces
Nursing care. Use class C2	c.170 bedspaces	c.240 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 2033 are as follows:
- 4.02 **Housing for older people** (retirement housing for sale and contemporary 'sheltered housing' for social/affordable rent<sup>27</sup>). The estimated housing for older people net need to 2033 is c.410 units of which c.60 for social/affordable rent and c.350 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.110 units of which c.55 for rent and c.55 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 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 the 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.40 bedspaces. Based on the evidence of dementia amongst the older population and that the 75+ household population is projected to increase to 2033, 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.170 bedspaces. Based on the evidence of dementia prevalence amongst the older population and that the 75+ household population is projected to increase to 2033, it is likely that a significant proportion of unmet need is likely to be for dementia related needs capacity.

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<sup>27</sup> New build and refurbishment of sheltered housing for social/affordable rent.

This report has been produced by Ian Copeman and Darius Ghadiali from the Housing LIN.

The Housing LIN is the leading 'learning lab' for a growing network of housing, health and social care professionals in England, Wales and Scotland involved in planning, commissioning, designing, funding, building and managing housing, care and support services for older people and vulnerable adults with long-term conditions.

Previously responsible for managing the UK Government Department of Health's Extra Care Housing Fund, the Housing LIN is called upon by a wide range of statutory and other organisations to provide expert advice and support regarding the implementation of policy and good practice in the field of housing, care and support services.

Recognised by government and industry as a leading 'knowledge hub' on specialist housing, our online and regional networked activities:

- connect people, ideas and resources to inform and improve the range of housing choices that enable older and disabled people to live independently
- provide intelligence on latest funding, research, policy and practice developments, and
- raise the profile of specialist housing with developers, commissioners and providers to plan, design and deliver aspirational housing for an ageing population and other people with care and support needs.