

Assessment of Specialist Housing and Accommodation Need for Older People in West Wales

For West Wales Care Partnership

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Housing LIN

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Executive summary

This report is a comprehensive assessment of the future need for specialised housing and accommodation for older people to 2035 for Carmarthenshire, Ceredigion and Pembrokeshire.

This quantitative evidence base is intended to be used as one source of evidence of future housing need amongst older people alongside other sources of data available to West Wales Care Partnership, for example qualitative research with older people locally.

Context

National and local policy support the development of a wider range of housing options and choices for older people as part of supporting people to live well in later life.

The preferences of older people are not always well supported by the choices available in the current housing market. A variety of housing alternatives are required that focus on providing attractive housing offers that support healthy, longer-term independent living and build greater personal and community resilience, thereby reducing pressures on social care and health services in the longer term.

The overall trend in the provision of housing and care for older people has been geared, over the past decade or more, to shift care provision from institutional settings toward more independent housing typologies that integrate housing and support for older people into the community.

What housing and accommodation for older people is required?

There has been an historic focus on the development of older people's housing for social rent, both age designated housing and sheltered housing.

There is some additional need for social housing for rent, however this needs to take account of the suitability of the existing stock of sheltered and age designated housing, i.e. there may be a need for replacement of some existing stock as this becomes redundant/hard to let in addition to the identified net housing need. In both cases the replacement housing offer should be attractive, 'care ready'¹ housing.

The net additional need for housing offers for sale, both for outright purchase and for shared ownership, reflects the historic lack of development of retirement housing offers for sale for

¹ Care ready housing typically means that a home is capable of adaptation over time to meet changing needs including space for aids and adaptations. Through good design homes can be built to be better suited to possible future requirements such as the need to have an over-night carer, storage for mobility scooters and space to retain independence.

older people and that the majority of older people in West Wales likely to be are home owners, albeit that many may have relatively low equity in their existing property.

There has been significant under development of housing with care for both rent and for sale in West Wales. There is a need for all tenures of housing with care, including mixed tenure developments. There will be a need for shared equity models as well as outright sale models particularly where older people have relatively low equity in existing properties.

There has tended to be an historic over reliance on the use of residential care. Changing preferences amongst older people for avoiding as far as possible a move to residential care and by local authority adult social care departments for reducing use of residential care beds, means that demand may decline in future.

Growing need for nursing care beds is being driven by a growing 'older, older', population, more people living with complex health and social care needs and people moving to a nursing care home at the end stage of life.

Implications for West Wales Care Partnership commissioners

The implications of the policy and practice context and the housing and accommodation assessment include:

- To meet the full range of needs and aspirations it will be necessary to offer a choice of housing which is most likely to meet the housing requirements of the local older population; this will require a **mix of housing types and tenures**.
- The evidence indicates that there is likely to be increasing demand, across all tenures and dwelling types (general needs and specialist provision) in relation to the housing offers that will facilitate '**downsizing**'/'**rightsizing**', creating a climate where moving in later life becomes a realistic and positive choice.
- There is a requirement for growth in delivery of housing with care options if the use of residential care is to decrease. These options need to include **extra care housing** but it needs to remain a vibrant community and the benefits need to be effectively marketed to older people.
- Other forms of housing with care will need to include '**care ready**' housing for rent and for sale, i.e. without care on-site, but designed to enable people to age in place, to allow for decreased mobility and permit individuals to be cared for easily in their own homes should that be required. This offer can vary in size and scale making it suitable for urban and rural settings.
- There is a need over time to identify existing **sheltered housing** schemes that can be improved to better support ageing in place for an increasing older population with growing care and support needs. Over time this is likely to mean that more people living in sheltered housing will have support needs.
- Older people's housing schemes will need to be able to cater for growing number of **people living with dementia**. This will require service providers to tailor their offer

to be dementia friendly but also the development of hybrid **housing and nursing care models** that can cater for people living with dementia with a wide range of care needs.

- There is an opportunity to support and nurture novel housing approaches, for example developing **co-operative or community-led housing** and the feasibility of supporting **co-housing** initiatives for older people.
- However, many older people will wish to **remain living in their existing housing** making adaptations as necessary to enable ageing in place. There will be a growing demand for adaptations, such as bathrooms being replaced with wet rooms, to enable this to happen.
- There is scope to increase the development of **'step-down' housing-based models of care** as part of a wider reablement strategy to ensure timely discharge from hospital and/or prevent unnecessary readmissions.
- A generational shift is underway and, over time, older people will become **increasingly sophisticated in their use of technology and social media**. There is an opportunity to make homes technologically smarter and to maximise the use of technology, including **telecare**, to enhance the health and independence of individuals.
- As recognised by the recent UK Government Homes, Communities and Local Government Select Committee² and the Welsh Government's Expert Group on housing for older people in Wales, there is a need for a comprehensive **information and advice service in relation to housing options for older people** that enables older people and their families to be well informed in relation to planning future moves.

² <https://www.parliament.uk/business/committees/committees-a-z/commons-select/communities-and-local-government-committee/news-parliament-2017/housing-for-older-people-report-17-19/>

1. Introduction

The Housing LIN has been commissioned by the West Wales Care Partnership to undertake an assessment of need for specialised housing and accommodation for older people.

The output is a comprehensive assessment of the future need for specialised housing and accommodation for older people to 2035 for Carmarthenshire, Ceredigion and Pembrokeshire.

This quantitative evidence base is intended to be used as one source of evidence of future housing need amongst older people alongside other sources of data available to West Wales Care Partnership, for example qualitative research with older people locally.

This report contains:

- Policy context: Older people and housing.
- Current supply and future need for housing and accommodation for older people in West Wales.
- Trends: Housing and care for older people.
- A strategic framework for West Wales Care Partnership: housing and accommodation suited to older people:
 - Future housing and accommodation requirements for older people across West Wales.
 - Older people's housing and accommodation: A typology.
 - Implications for West Wales Care Partnership commissioners.

2. Policy context: Older people and housing

National context

There is a clear policy context in relation to supporting a good quality of life for an ageing population. The Social Services and Well-Being (Wales) Act 2014 reframes the responsibilities of local authorities and their statutory partners in Wales. It emphasises the promotion of well-being and the prevention or delay of the need for formal social and health interventions. A principal goal of the Social Services and Well-being Wales Act is to enable people as they age, to overcome the barriers which prevent them from achieving and maintaining well-being and to do so as far as possible without having to turn to formal social care interventions.

Better quality and suitably located housing can make it possible for people to live at home for longer; it has the potential to create more resilient and connected communities and should be seen as a key component in delivering the vision set out in the Well-being of Future Generations (Wales) Act 2015.

The Strategy for Older People in Wales sets out the ambition that “older people have access to housing and services that supports their needs and promotes their independence”³. One of the outcomes within the recent National Outcomes Framework for people who need care and support, and for carers who need support (March 2016) is: *“I live in a home that best supports me to achieve my well-being.”*

Whilst there is a clear acknowledgement in policy terms of the importance of housing for older people in promoting their health and well-being, less emphasis and clarity has been given specifically to the role of housing in supporting an ageing population and in particular the need to develop more attractive and aspirational forms of housing aimed at older people.

The report by the Expert Group for Housing an Ageing Population in Wales for the Welsh Government, published last year, sought to attempt to fill this gap⁴. The report highlighted a number of both issues and aspirations in relation to widening the range of housing choices available to older people in Wales; in summary:

- The current housing supply in Wales does not reflect the lifestyle choices that people want or need as they age.

³ Welsh Government Strategy for Older People in Wales 2013 – 2023

⁴ Expert Group on housing an ageing population (2017) Welsh Government.

<http://gov.wales/topics/housing-and-regeneration/housing-supply/expert-group-on-housing-an-ageing-population/?lang=en>

- There is a need for a good mix of both affordable and private homes for sale and rent, designed to the 'age-friendly' and 'care ready' HAPPI⁵ (Housing our Ageing Population: Panel for Innovation) principles.
- Wales needs to be more ambitious, i.e. to be a place where public, private and third sectors work well together to innovate and co-create housing opportunities that will meet the needs of an ageing population.
- The need for innovation and investment in a broader range of housing options which promote wellbeing to lessen demand on health and social care services; there is a need for closer partnership working between Housing, Health, Social Care and the third sector to achieve this.
- Avoiding a "one size fits all" approach; local authorities in particular should aim to develop a better strategic understanding of the housing needs of different groups and communities, particularly the most vulnerable and disadvantaged, and plan and facilitate better housing options.
- It is necessary to fully and properly understand the housing requirements of older people beyond the demographic trends.
- Local authority planning systems should prioritise development for older people.
- There is a requirement for different stakeholders to stimulate the market, creating demand with innovative solutions and providing choice for older people.
- Access to information, support and advice is crucial. Older people and their families need information to help them make the right housing choices at the right time and in the right way.
- There is an even greater need for action by government in those areas of Wales where house builders perceive that development is uneconomic. In those areas, public agencies should be prepared to consider financial incentives aimed at ensuring that development is financially viable and that homeowners do have an incentive to move.

Although the Expert Group's report is intended to have a wide audience, much of the text and actions are aimed at local authorities albeit with their partners.

Policy Context: West Wales

The policy objective across the West Wales Care Partnership are to support older people to live well in later life and to widen the range of housing choices available to support that objective.

⁵ <https://www.housinglin.org.uk/Topics/browse/Design-building/HAPPI/>

Ageing Well in Ceredigion 2016-2019 recognises the role of housing in supporting age friendly communities.

Ceredigion Housing Strategy 2018-2023 recognises the need to build more of the right type of homes across all tenures, including smaller properties and homes that are attractive to older people wishing to downsize and maintain independence.

Ageing Well in Pembrokeshire identifies the importance of a range of housing options being available for older people including housing to rent and for sale and extra care housing.

Carmarthenshire's Vision for Sustainable Services for Older People for the Next Decade identifies the role of housing for rent and for sale and particularly extra care housing in widening housing options for older people.

Supported housing funding policy

UK Government announced in August 2018 its approach to future funding of supported accommodation including older people's housing⁶. As a result, there is no longer a plan to introduce a 'sheltered rent' funding model for older people's housing. The existing Housing Benefit regulations will continue to apply for the funding of eligible housing costs in supported housing and older people's housing for eligible individuals.

⁶https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/732692/Supported_Housing_Funding_Consultation_Response.pdf

3. Current supply and future need for housing and accommodation for older people

The Housing LIN uses its Strategic Housing for Older People (SHOP@) model for estimating future need for older people's housing and accommodation. SHOP@ has been developed based on known older people's housing and accommodation provision and trends in older people's commissioning and housing strategies across England and Wales. It has been used by many local authorities and private sector developers to estimate future housing and accommodation need for older people.

The older people's housing market has become more complex as financial pressures and customer expectations have increased. Differing local authority older people's commissioning strategies means that SHOP@ need projections are provided as a bespoke service that reviews the current market position of the authority concerned, in relation to older people's housing and accommodation, and their future plans and investment strategies.

SHOP@ approach

SHOP@ is based on available data and a series of reasoned assumptions based on established criteria. The approach used is in summary:

- a) Population covered
- b) The level of service anticipated
- c) The tenure mix of estimated required provision
- d) The current level of provision
- e) The future projected housing and accommodation requirement

a) Population covered.

SHOP@ was derived from the UK Government's *More Choice Greater Voice* (MCGV) report⁷. MCGV was a toolkit to project future older people's housing and care services. MCGV used the 75+ population as the projection base and this is replicated in SHOP@. The national population data can be found on the ONS website. The population aged 75+ for the West Wales local authorities is shown at Annexe 1.

b) The level of service required

SHOP@ refines the national data developed through the implementation of MCGV for projection estimate purposes, to better reflect local market conditions, customer

⁷https://www.housinglin.org.uk/assets/Resources/Housing/Support_materials/Reports/MCGVdocument.pdf

expectations and local commissioning strategies. SHOP@ has calculated the English and Welsh average service provision for older people's housing and accommodation, ranked each authority against all 326 authorities in England and all 22 authorities in Wales and applies assumptions in relation to future need. It uses prevalence rates for each service type per 1,000 people over 75. These prevalence rates can vary over time depending on local circumstances and plans. By multiplying the prevalence by the 75+ population a future need can be calculated, i.e. future need = 75+ population multiplied by the assumed 'prevalence rate' for different types of older people's housing and accommodation.

c) The tenure mix of estimated future service provision

In relation to estimated future need for older people's housing, the tenure split between ownership (typically leasehold housing) and social/affordable rent is dependent on the relative level of affluence/deprivation within an authority. The level of older people's housing for sale (leasehold) will vary across authorities. The greater the affluence of an area, the greater the likely proportion of leasehold older people's housing relative to social rented provision. SHOP@ uses the Index of Multiple Deprivation (IMD) as a proxy measure of relative deprivation/affluence to apply to future housing need to estimate the tenure split between ownership and rented units.

d) The level of current provision

SHOP@ uses the Elderly Accommodation Counsel database of national provision of older people's housing and care services. This is checked against local intelligence in relation to current provision.

e) Future projected housing and accommodation requirement

Future need is calculated by subtracting the current provision from the future need. Service shortfall = estimated future housing need minus current provision

Level of service required

Wales older people's housing/accommodation benchmarks

The SHOP@ model uses current service prevalence per 1,000 people aged over 75 and comparatively ranks each housing/accommodation service against the other 22 authorities in Wales. Over the last 5 years many authorities, including some within Wales, have reviewed their sheltered housing and have 'declassified' some schemes. In reviewing the authorities within West Wales sheltered housing and age-exclusive housing (which may differ from sheltered housing in not having communal facilities and no support services) are defined as 'housing for older people'. Extra care housing schemes have also changed over time, for example, as the size of viable schemes has increased. The services within this SHOP@ analysis are therefore defined as:

- **Housing for older people:** social sector sheltered and age-exclusive housing and private sector (leasehold) retirement housing. This will include schemes, for rent and

for sale, with on-site staff support, those with locality-based support services and schemes with no associated support services.

- **Housing with care:** includes extra care schemes, often called ‘assisted living’ in the private sector, with 24/7 care available on-site and housing schemes that offer bespoke care services, even if these are not full on-site 24/7 care, across both the social and private sector.
- **Residential care:** residential accommodation together with personal care, i.e. a care home.
- **Nursing care:** residential accommodation together with nursing care i.e. a care home with nursing.

The assumptions used are:

- Prevalence rate 75+: number of units/beds per 1,000 people 75+ (based on ONS population data May 2016). The population aged 75+ to 2035 is shown at Annexe 1.
- Rank of 22 local authorities: 1= highest prevalence 22 = lowest prevalence.
- Current provision of older people’s housing and accommodation.
- All beds in dual registered homes allocated to nursing care.

Table 1. West Wales: older people’s housing/accommodation benchmarks

	Housing for Older People		Housing with Care		Residential care		Nursing care	
	Prevalence 75+	Rank	Prevalence 75+	Rank	Prevalence 75+	Rank	Prevalence 75+	Rank
Carmarthenshire	174.7	2	10.5	11	58	4	28	20
Ceredigion	64.9	22	6.5	18	39	14	36.4	14
Pembrokeshire	84.8	17	10.3	12	37.8	16	39.1	11
Wales average	119.8		11		43.5		40.7	

Carmarthenshire

SHOP@ is based on future prevalence rates or service ‘benchmarks’ that match local plans and strategies, and development intent, in relation to older people’s housing and accommodation. Table 2 below shows the current older people’s housing and accommodation expressed as comparative average prevalence rates for Carmarthenshire and Wales (prevalence rates are the number of units/beds per 1,000 people 75+). For this first draft the following benchmark/prevalence rates for use in projecting future need (SHOP@ prevalence rates) are *suggested*. The rationale is set out in table 3.

Table 2. SHOP@ benchmarks: Carmarthenshire

	Carmarthenshire average prevalence rate	Wales average prevalence rate	2018 suggested prevalence rate	2035 suggested prevalence rate
Housing for Older people	174.7	119.8	174	119
Housing with Care	10.5	11	10.5	15
Residential	58	43.5	50	35
Nursing	28	40.7	30	38

Future estimated need

The profile of older people’s housing/accommodation in Carmarthenshire is summarised in table 3.

Table 3. Carmarthenshire service position and assumptions to estimate future need

Housing for Older People	Current provision is significantly above the national average. Currently ranked 2 out of 22 local authorities for older people’s housing. Estimated trend towards the national average to avoid future oversupply.
Housing with Care	Current provision is slightly below the national average. Estimated trend to higher level of provision to match aspirations in Welsh Government Older People’s Expert Housing Panel report ⁸ and older people’s preference for housing based options over residential care.
Residential Care	Current provision is significantly above the national average. Estimated decreasing trend to 2035 in line with estimated increasing trend for housing with care.
Nursing Care	Current provision is significantly below the national average. Estimated increasing trend to 2035 towards the national average given growing older population.

Applying the suggested prevalence rates for older people’s housing/accommodation (Table 2) in the SHOP@ model projects the following future need for Carmarthenshire. NB. Totals may not all sum due to rounding.

⁸ <https://gov.wales/topics/housing-and-regeneration/housing-supply/expert-group-on-housing-an-ageing-population/?lang=en>

Table 4. Carmarthenshire projected future need (units/beds) to 2035

	Current provision (units/beds)	2018	2020	2025	2030	2035
Housing for Older People	3128	3517	3510	3831	3865	3768
Housing with Care	189	212	241	315	378	475
Residential Care	1044	1011	1009	1102	1098	1108
Nursing Care	505	606	702	892	1046	1203

Current provision is subtracted from projected future need to identify the projected shortfall for different types of older people's housing/accommodation.

Table 5. Carmarthenshire estimated net need (shortfall in units/beds) to 2035

	Carmarthenshire estimated Shortfall (units/beds)				
	2018	2020	2025	2030	2035
Housing for Older People	389	382	703	737	640
Housing with Care	23	52	126	189	286
Residential Care	-33	-35	58	54	64
Nursing Care	101	197	387	541	698

Note: negative figures suggest a (theoretical) oversupply

Tenure Mix

Carmarthenshire has relatively limited provision of private retirement housing (typically leasehold) schemes. Consideration needs to be given to the requirements of older people's housing both for social/affordable rent and for sale. The tenure mix is dependent on the relative affluence/deprivation of the local authority area. The IMD score has been used as a 'proxy' to conservatively estimate the tenure split in the areas within the authority. The higher the IMD rank, the higher the estimated percentage of for sale (leasehold) properties expected. The Carmarthenshire areas IMD scores and the suggested tenure splits are shown in table 6 below.

Table 6. Estimated tenure split

	IMD score	Suggested Rent/Sale (%)
Area 1: Teifi, Tywi, Taf area	1024	80/20
Area 2: Amman Gwendraeth area	900	85/15
Area 3: Llanelli area	765	90/10

Source: <https://gov.wales/statistics-and-research/welsh-index-multiple-deprivation/?lang=en>

Applying these suggested tenure splits to the projected need for older people's housing/accommodation for Carmarthenshire by the three areas is shown in the following tables.

Area 1: Teifi, Tywi, Taf

Table 7. Area 1: Estimated future need (units/beds) to 2035

	Current provision (units/beds)	2018	2020	2025	2030	2035
Housing for Older People	1208	1325	1323	1444	1456	1420
Housing with Care	101	80	91	119	142	179
Residential Care	349	381	380	415	414	418
Nursing Care	163	228	265	336	394	453

Table 8. Area 1: Estimated net need (shortfall in units/beds) to 2035

	2018	2020	2025	2030	2035
Housing for Older People	117	115	236	248	212
<i>For rent</i>	-101	-103	-6	4	-25
<i>For sale</i>	218	218	242	244	237
Housing with Care	-21	-10	18	41	78
<i>For rent</i>	-37	-28	-6	13	42
<i>For sale</i>	16	18	24	28	36
Residential Care	32	31	66	65	69
Nursing Care	65	102	173	231	290

Note: negative figures suggest a (theoretical) oversupply

Area 2: Amman Gwendraeth

Table 9. Area 2: Estimated future need (units/beds) to 2035

	Current provision (units/beds)	2018	2020	2025	2030	2035
Housing for Older People	1048	1119	1117	1219	1229	1198
Housing with Care	50	68	77	100	120	151
Residential Care	296	321	321	351	349	352
Nursing Care	150	193	223	284	333	383

Table 10. Area 2: Estimated net need (shortfall in units/beds) to 2035

	2018	2020	2025	2030	2035
Housing for Older People	71	69	171	181	150
<i>For rent</i>	-97	-99	-12	-3	-29
<i>For sale</i>	168	167	183	184	180
Housing with Care	18	27	50	70	101
<i>For rent</i>	7	15	35	52	78
<i>For sale</i>	10	12	15	18	23
Residential Care	25	25	55	53	56
Nursing Care	43	73	134	183	233

Note: negative figures suggest a (theoretical) oversupply

Area 3: Llanelli area

Table 11. Area 3: Estimated future need (units/beds) to 2035

	Current provision (units/beds)	2018	2020	2025	2030	2035
Housing for Older People	872	1073	1071	1169	1179	1150
Housing with Care	38	65	74	96	115	145
Residential Care	399	308	308	336	335	338
Nursing Care	192	185	214	272	319	367

Table 12. Area 3: Estimated net need (shortfall in units/beds) to 2035

	2018	2020	2025	2030	2035
Housing for Older People	201	199	297	307	278
<i>For rent</i>	94	92	180	189	163
<i>For sale</i>	107	107	117	118	115
Housing with Care	27	36	58	77	107
<i>For rent</i>	20	28	48	66	92
<i>For sale</i>	6	7	10	12	14
Residential Care	-91	-91	-63	-64	-61
Nursing Care	-7	22	80	127	175

Note: negative figures suggest a (theoretical) oversupply

Summary

Table 13 shows the overall estimated net need for specialised older people's housing and accommodation at 2035 based on the assessment above.

Table 13 Estimated net need (shortfall in units/beds) to 2035

	Area 1	Area 2	Area 3	Total
Housing for Older People	212	150	278	640
<i>For rent</i>	-25	-29	163	109
<i>For sale</i>	237	180	115	532
Housing with Care	78	101	107	286
<i>For rent</i>	42	78	92	212
<i>For sale</i>	36	23	14	73
Residential Care	69	56	-61	64
Nursing Care	290	233	175	698

Note: negative figures suggest a (theoretical) oversupply

In summary this indicates that the estimated net requirements for Carmarthenshire to 2035 are:

- Housing for older people: 640 units of which 108 for rent and 532 for sale.
- Housing with care: 286 units of which 213 for rent and 73 for sale.
- Residential care: 64 beds.
- Nursing care: 698 beds.

Ceredigion

SHOP@ is based on future prevalence rates or service 'benchmarks' that match local plans and strategies, and development intent, in relation to older people's housing and accommodation. Table 14 below shows the current older people's housing and accommodation expressed as comparative average prevalence rates for Ceredigion and Wales (prevalence rates are the number of units/beds per 1,000 people 75+). For this first draft the following benchmark/prevalence rates for use in projecting future need (SHOP@ prevalence rates) are *suggested*. The rationale is set out in table 15.

Table 14. SHOP@ benchmarks: Ceredigion

	Ceredigion average prevalence rate	Wales average prevalence rate	2018 suggested prevalence rate	2035 suggested prevalence rate
Housing for Older people	64.9	119.8	70	80
Housing with Care	6.5	11	10	15
Residential	39	43.5	35	30
Nursing	36.4	40.7	37	40

Future estimated need

The profile of older people's housing/accommodation in Ceredigion is summarised in table 15.

Table 15. Ceredigion service position and assumptions to estimate future need

Housing for Older People	Current provision is significantly below the national average, reflecting the rurality of Ceredigion when compared with many other Welsh local authority areas. Currently ranked 22 out of 22 local authorities for older people's housing. Estimated increase in need <i>towards</i> the national average given growing older population.
Housing with Care	Current provision is below the national average. Estimated increase to higher level of provision to match aspirations in

	Welsh Government Older People's Expert Housing Panel report ⁹ and older people's preference for housing based options over residential care.
Residential Care	Current provision is slightly below the national average. Estimated decrease in need to 2035 in line with estimated increase in need for housing with care.
Nursing Care	Provision slightly below the national average. Estimated increase in need to the national average given growing older population.

Applying the suggested prevalence rates for older people's housing/accommodation (Table 14) in the SHOP@ model projects the following future need for Ceredigion.

Table 16. Ceredigion projected future need (units/beds) to 2035

	Current provision (units/beds)	2018	2020	2025	2030	2035
Housing for Older People	474	560	661	816	924	1018
Housing with Care	48	80	100	131	155	191
Residential Care	316	280	310	359	370	382
Nursing Care	271	296	347	424	477	522

Current provision is subtracted from projected future need to identify the projected shortfall for different types of older people's housing/accommodation.

Table 17. Ceredigion estimated net need (shortfall in units/beds) to 2035

	Ceredigion estimated Shortfall (units/beds)				
	2018	2020	2025	2030	2035
Housing for Older People	86	187	342	450	544
Housing with Care	32	52	83	107	143
Residential Care	-36	-6	43	54	66
Nursing Care	25	76	153	206	251

Tenure Mix

Ceredigion has relatively limited provision of private retirement housing (typically leasehold) schemes. Consideration needs to be given to the requirements of older people's housing both for social/affordable rent and for sale. The tenure mix is dependent on the relative affluence/deprivation of the local authority area. The IMD score has been used as a 'proxy' to estimate the tenure split in the areas within the authority. The higher the IMD rank, the higher the estimated percentage of for sale (leasehold) properties expected. The

⁹ <https://gov.wales/topics/housing-and-regeneration/housing-supply/expert-group-on-housing-an-ageing-population/?lang=en>

Pembrokeshire areas IMD scores and the suggested tenure splits are shown in table 18 below.

Table 18. Estimated tenure split

	IMD score	Suggested Rent/Sale (%)
North	1285	50/50
Mid	1023	60/40
South	872	70/30

Source: <https://gov.wales/statistics-and-research/welsh-index-multiple-deprivation/?lang=en>

Applying these suggested tenure splits to the projected need for older people's housing/accommodation for Ceredigion by the three four areas is shown in the following tables.

Area 1: South Ceredigion

Table 19. Area 1: Estimated future need (units/beds) to 2035

	Current provision (units/beds)	2018	2020	2025	2030	2035
Housing for Older People	158	197	232	287	325	358
Housing with Care	48	28	35	46	54	67
Residential Care	114	98	109	126	130	134
Nursing Care	106	104	122	149	168	183

Table 20. Area 1: Estimated net need (shortfall in units/beds) to 2035

	2018	2020	2025	2030	2035
Housing for Older People	39	74	129	167	200
<i>For rent</i>	27	52	90	117	140
<i>For sale</i>	12	22	39	50	60
Housing with Care	-20	-13	-2	6	19
<i>For rent</i>	-14	-9	-1	5	13
<i>For sale</i>	-6	-4	-1	2	6
Residential Care	-16	-5	12	16	20
Nursing Care	-2	16	43	62	77

Area 2: Mid Ceredigion

Table 21. Area 2: Estimated future need (units/beds) to 2035

	Current provision (units/beds)	2018	2020	2025	2030	2035
Housing for Older People	76	170	201	248	280	309
Housing with Care	0	24	30	40	47	58
Residential Care	126	85	94	109	112	116
Nursing Care	0	90	105	129	145	158

Table 22. Area 2: Estimated net need (shortfall in units/beds) to 2035

	2018	2020	2025	2030	2035
Housing for Older People	94	125	172	204	233
<i>For rent</i>	56	75	103	123	140
<i>For sale</i>	38	50	69	82	93
Housing with Care	24	30	40	47	58
<i>For rent</i>	15	18	24	28	35
<i>For sale</i>	10	12	16	19	23
Residential Care	-41	-32	-17	-14	-10
Nursing Care	90	105	129	145	158

NB. Negative numbers suggest a theoretical oversupply

Area 3: North Ceredigion

Table 23. Area 3: Estimated future need (units/beds) to 2035

	Current provision (units/beds)	2018	2020	2025	2030	2035
Housing for Older People	240	193	228	282	319	351
Housing with Care	0	28	35	45	54	66
Residential Care	76	97	107	124	128	132
Nursing Care	165	102	120	147	165	180

Table 24. Area 3: Estimated net need (shortfall in units/beds) to 2035

	2018	2020	2025	2030	2035
Housing for Older People	-47	-12	42	79	111
<i>For rent</i>	-23	-6	21	40	56
<i>For sale</i>	-23	-6	21	40	56
Housing with Care	28	35	45	54	66
<i>For rent</i>	14	17	23	27	33
<i>For sale</i>	14	17	23	27	33
Residential Care	21	31	48	52	56
Nursing Care	-63	-45	-18	0	15

NB. Negative numbers suggest a theoretical oversupply

Summary

Table 25 shows the overall estimated net need for specialised older people’s housing and accommodation at 2035 based on the assessment above.

Table 25. Estimated net need (shortfall in units/beds) to 2035

	South	Mid	North	Total
Housing for Older People	200	233	111	544
<i>For rent</i>	140	140	56	335
<i>For sale</i>	60	93	56	209
Housing with Care	19	58	66	143
<i>For rent</i>	13	35	33	81
<i>For sale</i>	6	23	33	62
Residential Care	20	-10	56	66
Nursing Care	77	158	15	251

In summary this indicates that the estimated net requirements for Ceredigion to 2035 are:

- Housing for older people: 544 units.
- Housing with care: 143 units.
- Residential care: 66 beds.
- Nursing care: 251 beds.

Pembrokeshire

SHOP@ is based on future prevalence rates or service ‘benchmarks’ that match local plans and strategies, and development intent, in relation to older people’s housing and accommodation. Table 26 below shows the current older people’s housing and accommodation expressed as comparative average prevalence rates for Pembrokeshire and Wales (prevalence rates are the number of units/beds per 1,000 people 75+). For this first draft the following benchmark/prevalence rates for use in projecting future need (SHOP@ prevalence rates) are *suggested*.

Table 26. SHOP@ benchmarks: Pembrokeshire

	Pembrokeshire average prevalence rate	Wales average prevalence rate	2018 suggested prevalence rate	2035 suggested prevalence rate
Housing for Older people	84.8	119.8	90	100
Housing with Care	10.3	11	10.3	15
Residential	37.8	43.5	35	30
Nursing	39.1	40.7	39.1	41

Future estimated need

The profile of older people's housing/accommodation in Pembrokeshire is summarised in table 27.

Table 27. Pembrokeshire service position and assumptions to estimate future need

Housing for Older People	Current provision is below the national average. Currently ranked 17 out of 22 local authorities for older people's housing. Estimated increase in need towards the national average given growing older population.
Housing with Care	Current provision is slightly below the national average. Estimated increase to higher level of provision to match aspirations in Welsh Government Older People's Expert Housing Panel report ¹⁰ and older people's preference for housing based options over residential care.
Residential Care	Provision below the national average. Estimated decrease in need to 2035 in line with estimated increase in need for housing with care.
Nursing Care	Provision slightly below the national average. Estimated increase in need to the national average given growing older population.

Applying the suggested prevalence rates for older people's housing/accommodation (Table 1) in the SHOP@ model projects the following future need for Pembrokeshire.

Table 30. Pembrokeshire projected future need (units/beds) to 2035

	Current provision (units/beds)	2018	2020	2025	2030	2035
Housing for Older People	1119	1321	1455	1804	2045	2259
Housing with Care	128	147	173	228	273	339
Residential Care	479	514	535	627	650	678
Nursing Care	483	572	614	741	839	926

Current provision is subtracted from projected future need to identify the projected shortfall for different types of older people's housing/accommodation.

Table 31. Pembrokeshire estimated net need (shortfall in units/beds) to 2035

	Pembrokeshire estimated Shortfall (units/beds)				
	2018	2020	2025	2030	2035
Housing for Older People	202	336	685	926	1140
Housing with Care	19	45	100	145	211
Residential Care	35	56	148	171	199
Nursing Care	89	131	258	356	443

¹⁰ <https://gov.wales/topics/housing-and-regeneration/housing-supply/expert-group-on-housing-an-ageing-population/?lang=en>

Tenure Mix

Pembrokeshire has relatively limited provision of private retirement housing (typically leasehold) schemes. Consideration needs to be given to the requirements of older people's housing both for social/affordable rent and for sale. The tenure mix is dependent on the relative affluence/deprivation of the local authority area. The IMD score has been used as a 'proxy' to estimate the tenure split in the areas within the authority. The higher the IMD rank, the higher the estimated percentage of for sale (leasehold) properties expected. The Pembrokeshire areas IMD scores and the suggested tenure splits are shown in table 32 below.

Table 32. Estimated tenure split

	IMD score	Suggested Rent/Sale (%)
Area 1: North West	1137	60/40
Area 2: South West	739	70/30
Area 3: South East	1253	50/50
Area 4: North East	1173	60/40

Source: <https://gov.wales/statistics-and-research/welsh-index-multiple-deprivation/?lang=en>

Applying these suggested tenure splits to the projected need for older people's housing/accommodation for Pembrokeshire by the four areas is shown in the following tables.

Area 1 North West

Table 33. Area 1 North West: Estimated future need (units/beds) to 2035

	Current provision (units/beds)	2018	2020	2025	2030	2035
Housing for Older People	59	220	243	301	341	377
Housing with Care	0	24	29	38	45	56
Residential Care	51	86	89	104	108	113
Nursing Care	45	95	102	123	140	154

Table 34. Area 1 North West: Estimated net need (shortfall in units/beds) to 2035

	2018	2020	2025	2030	2035
Housing for Older People	161	184	242	282	318
<i>For rent</i>	97	110	145	169	191
<i>For sale</i>	64	73	97	113	127
Housing with Care	24	29	38	45	56
<i>For rent</i>	15	17	23	27	34
<i>For sale</i>	10	12	15	18	23
Residential Care	35	38	53	57	62
Nursing Care	50	57	78	95	109

Area 2 South West

Table 35. Area 2 South West: Estimated future need (units/beds) to 2035

	Current provision (units/beds)	2018	2020	2025	2030	2035
Housing for Older People	690	539	594	736	835	922
Housing with Care	88	60	71	93	111	138
Residential Care	216	210	218	256	265	277
Nursing Care	198	234	250	302	342	378

Table 36. Area 2 South West: Estimated net need (shortfall in units/beds) to 2035

	2018	2020	2025	2030	2035
Housing for Older People	-151	-96	46	145	232
<i>For rent</i>	-106	-67	33	101	163
<i>For sale</i>	-45	-29	14	43	70
Housing with Care	-28	-17	5	23	50
<i>For rent</i>	-20	-12	4	16	35
<i>For sale</i>	-8	-5	2	7	15
Residential Care	-6	2	40	49	61
Nursing Care	36	52	104	144	180

Area 3 South East

Table 37. Area 3 South East: Estimated future need (units/beds) to 2035

	Current provision (units/beds)	2018	2020	2025	2030	2035
Housing for Older People	344	378	417	517	586	647
Housing with Care	0	42	50	65	78	97
Residential Care	175	147	153	179	186	194
Nursing Care	240	164	176	212	240	265

Table 38. Area 3 South East: Estimated net need (shortfall in units/beds) to 2035

	2018	2020	2025	2030	2035
Housing for Older People	34	73	173	242	303
<i>For rent</i>	17	36	86	121	151
<i>For sale</i>	17	36	86	121	151
Housing with Care	42	50	65	78	97
<i>For rent</i>	21	25	33	39	49
<i>For sale</i>	21	25	33	39	49
Residential Care	-28	-22	4	11	19
Nursing Care	-76	-64	-28	0	25

Area 4 North East

Table 39. Area 4 North East: Estimated future need (units/beds) to 2035

	Current provision (units/beds)	2018	2020	2025	2030	2035
Housing for Older People	26	183	202	250	284	313
Housing with Care	40	20	24	32	38	47
Residential Care	37	71	74	87	90	94
Nursing Care	0	79	85	103	116	128

Table 40. Area 4 North East: Estimated net need (shortfall in units/beds) to 2035

	2018	2020	2025	2030	2035
Housing for Older People	157	176	224	258	287
<i>For rent</i>	94	106	135	155	172
<i>For sale</i>	63	70	90	103	115
Housing with Care	-20	-16	-8	-2	7
<i>For rent</i>	-12	-10	-5	-1	4
<i>For sale</i>	-8	-6	-3	-1	3
Residential Care	34	37	50	53	57
Nursing Care	79	85	103	116	128

Summary

Table 41 shows the overall estimated net need for specialised older people's housing and accommodation at 2035 based on the assessment above.

Table 41. Estimated net need (shortfall in units/beds) to 2035

	Area 1 North West	Area 2 South West	Area 3 South East	Area 4 North East	Total
Housing for Older People	318	232	303	287	1140
<i>For rent</i>	191	163	151	172	677
<i>For sale</i>	127	70	151	115	463
Housing with Care	56	50	97	7	211
<i>For rent</i>	34	35	49	4	122
<i>For sale</i>	23	15	49	3	89
Residential Care	62	61	19	57	199
Nursing Care	109	180	25	128	443

In summary this indicates that the estimated net requirements for Pembrokeshire to 2035 are:

- Housing for older people: 1,140 units of which 677 for rent and 463 for sale.

Assessment of Specialist Housing and Accommodation Need for Older People across West Wales

- Housing with care: 211 units of which 122 for rent and 89 for sale.
- Residential care: 199 beds.
- Nursing care: 443 beds.

4. Trends: Housing and care for older people

Encouraging a wider mix of housing choices

The preferences of older people are not always well supported by the choices available in the current housing market. A variety of housing alternatives are required that focus on providing attractive housing offers that support healthy, longer-term independent living and build greater personal and community resilience, thereby reducing pressures on social care and health services in the longer term.

The overall trend in the provision of housing and care for older people has been geared, over the past decade or more, to shift care provision from institutional settings toward more independent housing typologies that integrate housing and support for older people into the community.

'Housing our Ageing Population: Panel for Innovation' (or HAPPI)¹¹ has arguably been the single most important 'unofficial' policy driver affecting the future for older peoples housing and associated services. This is a developing body of work with four reports so far with the most recent published in May 2018 with a focus on housing for older people in rural areas which is particularly relevant to the West Wales Care Partnership context. And as recognised by the Welsh Government's Expert Group, if housing for older people, including sheltered housing and extra care housing, is to reflect the aspirational needs and expectations of current and future older people in Wales, the development and adoption of more aspirational designs for all forms of housing for older people is necessary, reflecting the HAPPI principles.

In particular, HAPPI 1¹² highlights a series of inspirational case studies and examples of housing that reflect the needs and aspirations of an ageing society, suggesting that:

- we should all plan ahead positively, creating demand for better choice through a greater range of housing opportunities.
- housing for older people should become an exemplar for mainstream housing and meet higher design standards for space and quality.

The subsequent All Party Parliamentary Group (APPG) inquiry report, HAPPI 2¹³: 'Plan for Implementation', sets out how better housing options for older people could have economic benefits in the form of reduced health and social care costs, and increased housing options for younger people if older people could be encouraged to downsize.

¹¹ <https://www.housinglin.org.uk/Topics/browse/Design-building/HAPPI/>

¹² <https://www.housinglin.org.uk/Topics/type/The-Housing-our-Ageing-Population-Panel-for-Innovation-HAPPI-Report-2009/>

¹³ <https://www.housinglin.org.uk/Topics/type/Housing-our-Ageing-Population-Plan-for-Implementation-HAPPI2-Report-2012/>

More recently HAPPI 3, 'Making Retirement Living A Positive Choice'¹⁴ takes forward some positive ideas for ways in which government policy as well as action by housing developers and providers can enhance the housing offer to potential 'right-sizers', which are reflected in the report by the Expert Group for housing an ageing population in Wales for the Welsh Government.

HAPPI 4 'Rural Housing for an Ageing Population: Preserving Independence'¹⁵, which is particularly relevant to West Wales, recommends that the ageing population in rural areas also deserves a new drive for more and better homes, preferably where older people can stay close to friends and family - and their informal networks they provide - and always where their independence can be preserved. It finds that creative, well-designed HAPPI inspired homes need to be available for sale, and at both market and affordable rents. And the release of larger properties helps families find the homes that suit them.

The review of extra care housing in Wales¹⁶ also identified a series of relevant recommendations:

- Clarify the role specialist provision (including extra care) will play in meeting the housing needs of an ageing population (based on an understanding of local housing and accommodation needs of older people).
- Public subsidy is vital to the future growth of the extra care sector and that the Welsh Government might consider ring-fencing a portion of Social Housing Grant (SHG) to support further growth of the sector. However, evidence from the survey and to a qualified extent from the qualitative research indicates that some older owner occupiers are seeking a for sale extra care housing offer, as part of a wider mix of housing offers.
- Manage uncertainty in revenue funding and promote creativity in provision. Whilst it remains unclear the precise impact of the UK Government's proposal for funding older people's housing, 'sheltered rent', there is likely to be a tendency to reduce the weekly costs of extra care provision through reducing the scale of communal space and facilities.
- New developments should follow design good practice. It is clear that the HAPPI standards have helped to improve the quality of a range of new older people's housing developments. The evidence from the qualitative research indicates that in order to attract 'downsizing'/'rightsizing' older people are seeking a high quality, well designed housing offer.

¹⁴ <https://www.housinglin.org.uk/Topics/type/Housing-our-Ageing-Population-Positive-Ideas-HAPPI-3-Making-retirement-living-a-positive-choice/>

¹⁵ <https://www.housinglin.org.uk/Topics/type/Rural-Housing-for-an-Ageing-Population-Preserving-Independence-HAPPI-4/>

¹⁶ <http://gov.wales/statistics-and-research/evaluation-extra-care/?lang=en>

In relation to planning housing for older people in rural areas, Powys County Council has produced an Accommodation for an ageing population Market Position Statement (2017)¹⁷ which sets out the housing and accommodation requirements of its older population to 2035 by locality.

In semi-urban and rural areas, HAPPI 4 highlights that it is essential that policy makers and local authorities recognise the growing housing needs of older people in the countryside, within villages and new 'hubs' in market towns where services can be brought together under one roof.

Care enabled technology

Technology enabled healthcare should be viewed as a core component of all the proposed types of housing and accommodation.

Recent policy across the UK in relation to care has identified telecare and telehealth as a core component of supporting older and disabled people. Telecare involves using digital technology to support independent living and to give commissioners and providers better insight into individuals' needs.

One area that has not changed dramatically over the last 30 years are the telecare systems that provide care and reassurance for older people /vulnerable living in their homes. These systems are still analogue-based in the main and not suitable to take advantage of the Internet of Things.

As the proliferation of internet-connected devices and the Internet of Things continues, the use of digital technology is not only going to be fundamental in supporting older people to manage their own health, it also provides new opportunities for residents to remain connected to friends, family and the outside world.

Providing residents access to broadband internet services can be a simple way to improve the quality of care provision for many people; some housing providers have already done this. Whilst use amongst older people has traditionally been lower than in the wider population, this is changing. Women aged over 75 are the fastest growing segment of new users.

It is important to gain a better understanding of technology-enabled care including how specific apps and programmes could be utilised to support older people to live more independently. There is also an expectation that technology could reduce costs (e.g. alarm services, staff tracking, lone worker arrangements) and be better integrated into work processes.

The demand for housing that better meets the needs of an ageing population will be accelerated by rising customer expectations amongst older people. They will expect better

¹⁷http://pstatic.powys.gov.uk/fileadmin/Docs/Adults/Integration/Market_Position_Statement_V1.0_6M_arch17.pdf

quality and choice – housing that meets their lifestyle preferences and that promotes access to services that facilitate independence in later life including access to and through the use of digital technology.

These digital technologies will provide a range of benefits:

- Enable older people to have access to technology that offers greater control over the way personal care or support is delivered.
- For commissioners it offers the opportunity to use technology to better support older people to remain independent for longer
- For providers it offers the potential for easier communication with residents and potential for cost efficiencies.

However, there is also likely to be a small cohort of older people who are not technology-enabled and/or do not have (or wish to have) access to Wi-Fi, where there may be ongoing intensive housing management and/or support requirements.

Health and wellbeing

There is growing evidence that recognises and strengthens the role of housing in relation to a range of health and wellbeing issues including how well designed housing for older people can help reduce the need for adult social care and demand on NHS services (e.g. reducing residential care admissions, preventing hospital admissions/reablement, combating isolation or loneliness, better at home care coordination, a wider community resource, and opportunities for greater personal and community resilience).

There is a growing body of evidence to support this including:

- A longitudinal study by Aston University¹⁸ for The Extra Care Charitable Trust which identified savings to councils in relation to social care of £4,500 per annum for high care customers and £1,700 for low care needs customers. In addition, the study suggests a reduction of GP visits of almost 50 per cent.
- A BRE¹⁹ studies which suggests poor quality housing costs the NHS £1.4 billion per annum with £500m directly related to older people.
- A Housing LIN study²⁰ for Trailway Court in Dorset which compared wellbeing after entering the scheme to before moving into an extra care housing scheme.

¹⁸http://www.housinglin.org.uk/assets/Resources/Housing/Support_materials/Aston_ECCT_research.pdf

¹⁹ <http://www.bre.co.uk/healthbriefings>

²⁰ <http://www.housinglin.org.uk/Topics/type/Blazing-a-trail-Extra-Care-Housing-in-Blandford-Forum-Dorset>

- A case study from NE Lincolnshire²¹ which evaluated a new extra care scheme using a control group of residents which as concluded savings of £4,000 per annum per extra care unit in terms of care cost savings to councils

Integration between health and social care is a key national priority in Wales. A proactive approach is to develop an explicit 'health and housing' service offer, i.e. where housing providers are being funded by NHS commissioners and local authorities to avoid or reduce delayed transfers of care, prevent unplanned hospital admissions and promote health and wellbeing of older people. There is an opportunity for older people's housing to be part of a more integrated health and housing offer that is effective at supporting older people to maintain their independence.

²¹ <http://www.housinglin.org.uk/Topics/type/Evaluating-extra-care-valuing-what-really-matters-The-case-for-taking-relationships-seriously/>

5. A strategic framework for West Wales Care Partnership: housing and accommodation suited to older people

Future housing and accommodation requirements

The evidence from the assessment of need for specialist housing and accommodation for older people indicates in summary the following requirements in the West Wales Care Partnership area to 2035.

Carmarthenshire

Table 42. Estimated need for older people's housing and accommodation to 2035

Carmarthenshire	2018 current provision (units/beds)	2035 estimated need	Net need (units/beds)
Housing for Older People	3128	3768	640
Housing with Care	189	475	286
Residential Care	1044	1108	64
Nursing Care	505	1203	698

In summary this indicates that the estimated net requirements for Carmarthenshire to 2035 are:

- Housing for older people: 640 units of which 108 for rent and 532 for sale.
- Housing with care: 286 units of which 213 for rent and 73 for sale.
- Residential care: 64 beds.
- Nursing care: 698 beds.

Ceredigion

Table 43. Estimated need for older people's housing and accommodation to 2035

Ceredigion	2018 current provision (units/beds)	2035 estimated need	Net need (units/beds)
Housing for Older People	474	1018	544
Housing with Care	48	191	143
Residential Care	316	382	66
Nursing Care	271	522	251

In summary this indicates that the estimated net requirements for Ceredigion to 2035 are:

- Housing for older people: 544 units of which 335 for rent and 209 for sale.

- Housing with care: 143 units of which 81 units for rent and 62 units for sale.
- Residential care: 66 beds.
- Nursing care: 251 beds.

Pembrokeshire

Table 44. Estimated need for older people’s housing and accommodation to 2035

Pembrokeshire	2018 current provision (units/beds)	2035 estimated need	Net need (units/beds)
Housing for Older People	1119	2259	1140
Housing with Care	128	339	211
Residential Care	479	678	199
Nursing Care	483	926	443

In summary this indicates that the estimated net requirements for Pembrokeshire to 2035 are:

- Housing for older people: 1,140 units of which 677 for rent and 463 for sale.
- Housing with care: 211 units of which 122 for rent and 89 for sale.
- Residential care: 199 beds.
- Nursing care: 443 beds.

West Wales Care Partnership: Summary

Table 45. Estimated need for older people’s housing and accommodation to 2035

West Wales	2018 current provision (units/beds)	2035 estimated need	Net need (units/beds)
Housing for Older People	4721	7045	2324
Housing with Care	365	1005	640
Residential Care	1839	2168	329
Nursing Care	1259	2651	1392

There has been an historic focus on the development of older people’s housing for social rent, both age designated housing and sheltered housing.

Whilst there is some additional need for social housing for rent, this needs to take account of the suitability of the existing stock of sheltered and age designated housing, i.e. there may be a need for replacement of some existing stock as this becomes redundant/hard to let in

addition to the identified net housing need. In both cases the replacement housing offer should be attractive, 'care ready'²² housing.

The net additional need for housing offers for sale, both for outright purchase and for shared ownership, reflects the historic lack of development of retirement housing offers for sale for older people and that the majority of older people in West Wales likely to be are home owners, albeit that many may have relatively low equity in their existing property.

There has been significant under development of housing with care for both rent and for sale in West Wales.

There is a need for all tenures of housing with care, including mixed tenure developments. There will be a need for shared equity models as well as outright sale models particularly where older people have relatively low equity in existing properties.

There has tended to be an historic over reliance on the use of residential care. Changing preferences amongst older people for avoiding as far as possible a move to residential care and by local authority adult social care departments for reducing use of residential care beds, means that demand may in fact decline in future.

Growing need for nursing care beds is being driven by a growing 'older, older', population, more people living with complex health and social care needs and people moving to a nursing care home at the end stage of life.

Older people's housing and accommodation: A typology

The evidence of what is needed to meet older people's future housing and accommodation requirements is complex suggesting that a sophisticated mix of housing models and approaches will be required over the next 10-20 years.

A typology (i.e. a way of describing and understanding housing/accommodation options for an ageing population) is set out in Figure 1. This is based on the DWELL programme²³. This shows the range of housing and accommodation options in relation to addressing the needs of an ageing population. This range covers general needs (mainstream) housing, specialist housing (i.e. housing specifically for older people) and care-based provision (residential/nursing care, hospital based care).

This typology is suggested as a *guide* to specifying the housing and accommodation requirements that are indicated by the evidence base, specifically estimated housing and accommodation need, the policy context and wider trends in relation to housing for older people.

²² Care ready housing typically means that a home is capable of adaptation over time to meet changing needs including space for aids and adaptations. Through good design homes can be built to be better suited to possible future requirements such as the need to have an over-night carer, storage for mobility scooters and space to retain independence.

²³ <http://dwell.group.shef.ac.uk/>

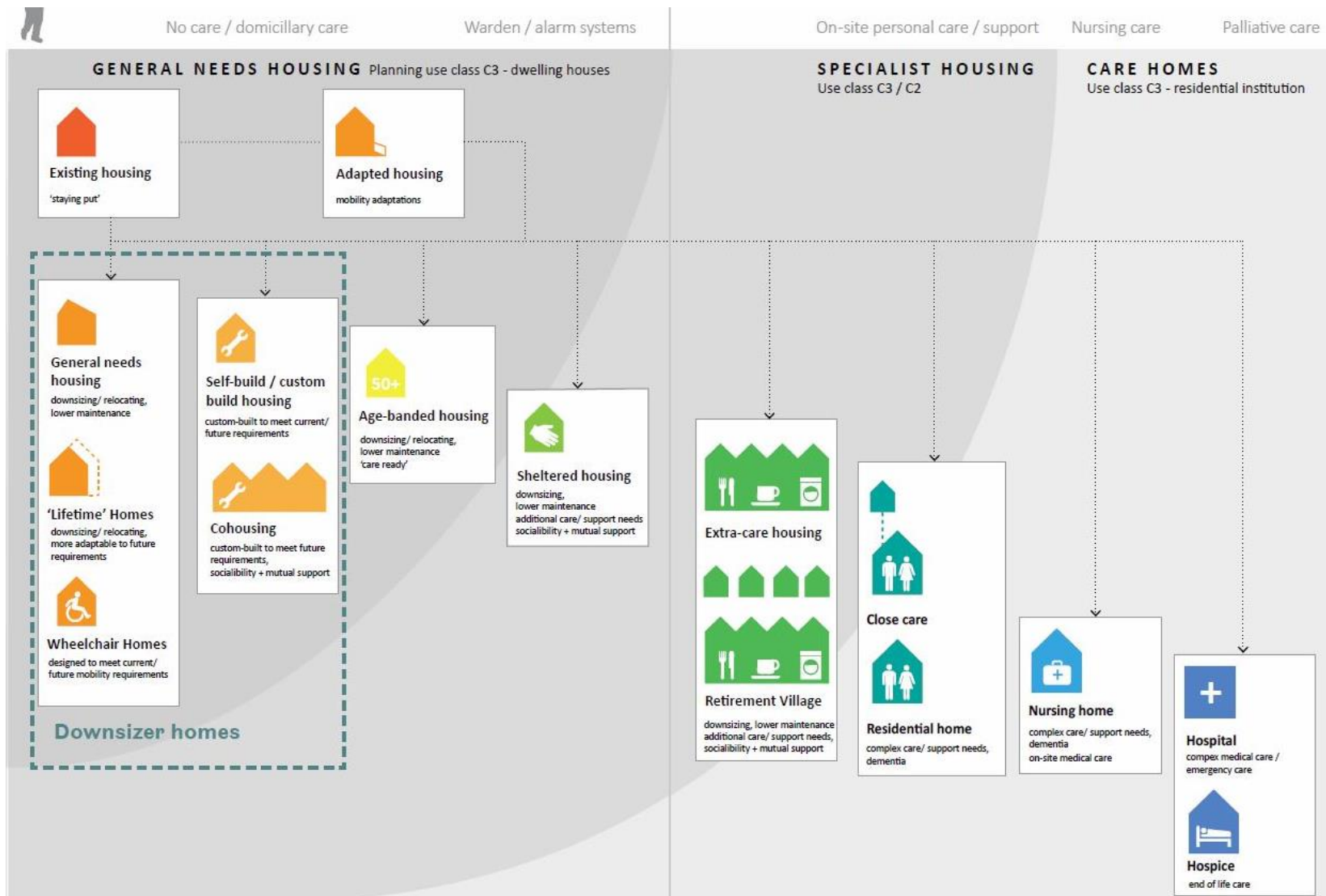
The typology includes:

- General needs housing: existing housing/adapted housing
- General needs housing: new mainstream housing including Lifetime Homes²⁴ wheelchair adapted homes.
- Age designated housing and sheltered/retirement housing
- Extra care housing
- Co-housing schemes
- Dementia specific housing and accommodation

Whilst the typology set out in Figure 1 clearly identifies housing types for 'downsizing' purposes, the evidence from this research indicates that all the different general needs and specialist forms of housing may present 'downsizing' opportunities if they are sufficiently well designed and located to respond to what are the different motivations for 'downsizing' at different ages.

²⁴ <http://www.lifetimehomes.org.uk/>

Figure 1. Older people’s housing and accommodation: A typology



Implications for West Wales Care Partnership commissioners

The implications of the policy and practice context and the housing and accommodation assessment include:

- To meet the full range of needs and aspirations it will be necessary to offer a choice of housing which is most likely to meet the housing requirements of the local older population; this will require a **mix of housing types and tenures**.
- The evidence indicates that there is likely to be increasing demand, across all tenures and dwelling types (general needs and specialist provision) in relation to the housing offers that will facilitate **'downsizing'/'rightsizing'**, creating a climate where moving in later life becomes a realistic and positive choice.
- There is a requirement for growth in delivery of housing with care options if the use of residential care is to decrease. These options need to include **extra care housing** but it needs to remain a vibrant community and the benefits need to be effectively marketed to older people.
- Other forms of housing with care will need to include **'care ready' housing** for rent and for sale, i.e. without care on-site, but designed to enable people to age in place, to allow for decreased mobility and permit individuals to be cared for easily in their own homes should that be required. This offer can vary in size and scale making it suitable for urban and rural settings.
- There is a need over time to identify existing **sheltered housing** schemes that can be improved to better support ageing in place for an increasing older population with growing care and support needs. Over time this is likely to mean that more people living in sheltered housing will have support needs.
- Older people's housing schemes will need to be able to cater for growing number of **people living with dementia**. This will require service providers to tailor their offer to be dementia friendly but also the development of hybrid **housing and nursing care models** that can cater for people living with dementia with a wide range of care needs.
- There is an opportunity to support and nurture novel housing approaches, for example developing **co-operative or community-led housing** and the feasibility of supporting **co-housing** initiatives for older people.
- However, many older people will wish to **remain living in their existing housing** making adaptations as necessary to enable ageing in place. There will be a growing demand for adaptations, such as bathrooms being replaced with wet rooms, to enable this to happen.

- There is scope to increase the development of **'step-down' housing-based models of care** as part of a wider reablement strategy to ensure timely discharge from hospital and/or prevent unnecessary readmissions.
- A generational shift is underway and, over time, older people will become **increasingly sophisticated in their use of technology and social media**. There is an opportunity to make homes technologically smarter and to maximise the use of technology, including **telecare**, to enhance the health and independence of individuals.
- As recognised by the recent UK Government Homes, Communities and Local Government Select Committee²⁵ and the Welsh Government's Expert Group on housing for older people in Wales, there is a need for a comprehensive **information and advice service in relation to housing options for older people** that enables older people and their families to be well informed in relation to planning future moves.

In summary, a well-balanced approach to widening housing choices for older people will include:

- Matching different housing options to identified need in particular locations/communities to ensure there is a balance and mix of housing options (dwelling and tenure) developed and available to meet future need.
- Developing a range of new age-designated housing, for rent and for sale, that will encourage and attract downsizing.
- Applying HAPPI principles²⁶ as far as possible both to new build designed for older people specifically and to a proportion of mainstream market housing.
- Adapting and improving existing sheltered housing where feasible.
- Having a mix of care and support delivery models.
- Improved use of technology that enables and supports lifestyle choices and meets care/support needs where appropriate and desired by older people.

²⁵ <https://www.parliament.uk/business/committees/committees-a-z/commons-select/communities-and-local-government-committee/news-parliament-2017/housing-for-older-people-report-17-19/>

²⁶ <https://www.housinglin.org.uk/Topics/browse/Design-building/HAPPI/>

Annexe 1

Pembrokeshire population (75+)

	2017	2020	2025	2030	2035
Area 1	2447	2623	3166	3497	3766
Area 2	5991	6421	7752	8562	9222
Area 3	4203	4505	5439	6006	6469
Area 4	2036	2182	2634	2909	3134
Total	14677	15731	18991	20974	22591

Source: Pembrokeshire County Council

Ceredigion population (75+)

	2017	2020	2025	2030	2035
North	2763	3150	3758	4117	4393
Mid	2428	2768	3302	3618	3861
South	2811	3205	3823	4188	4469
Total	8,002	9,122	10,883	11,923	12,723

Source: Stats Wales/Ceredigion Council

Carmarthenshire population (75+)

	2017	2020	2025	2030	2035
Area 1	7616	8267	9888	10950	11930
Area 2	6429	6979	8346	9243	10070
Area 3	6167	6694	8006	8867	9660
Total	20212	21940	26240	29060	31660

Source: Carmarthenshire County Council

Summary: West Wales Care Partnership population 75+

	2017	2020	2025	2030	2035
Carmarthenshire	20212	21940	26240	29060	31660
Ceredigion	8002	9122	10883	11923	12723
Pembrokeshire	14677	15731	18991	20974	22591
Total	42891	46793	56114	61957	66974