

Contact Consulting

The need for specialised accommodation for older people within the area of the New Forest District Council and in support of a proposed development of 32 Retirement Living Apartments and associated facilities by Churchill Retirement Living on the site of the former Police Station, Southampton Road, Lymington, SO41 9GH

**PINS Ref:
LPA Ref: 21/10938**

**Proof of Evidence of
Nigel J W Appleton MA (Cantab)**

March 29th 2022



Contents

	Page
1 Introduction	2
2 Declaration	2
3 The Scope of my Evidence	2
4 Methodology	3
5 The age profile of the local population	4
6 Indicators of need for specialised accommodation, care and support	5
7 Shaping an appropriate response to the identified need	5
8 Responding to need among older homeowners	6
9 Conclusions	9
Appendix Schedule of appeals in which Nigel Appleton of Contact Consulting has provided evidence	10

1 Introduction

1.1 I am Nigel Appleton, Executive Chairman of Contact Consulting (Oxford) Ltd, a specialist research and development consultancy working at the intersection of health, housing and social care. My particular field of interest is in identifying the accommodation and care needs of older people, and the volumes and styles of provision that appropriately respond to those needs.

1.2 Among more than thirty publications in the field in 2002 I wrote “Planning for the Needs of the Majority – the needs and aspirations of older people in general housing” for the Joseph Rowntree Foundation. In 2004 for the Department of Health I wrote “Extra Care Housing for older people: an introduction for commissioners” to support the department’s early funding initiatives to encourage Extra Care Housing. This was followed in 2007 by “Connecting Housing to the Health and Social Care Agenda – a person centred approach”.

1.3 In 2008 I wrote “More Choice: Greater Voice – a toolkit for producing a strategy for accommodation with care for older people”, a joint publication for the Department for Communities and Local Government and the Care Services Improvement Partnership at the Department of Health. This was followed in 2012 when I contributed the section “Preparing the Evidence Base” to “Housing in later life – planning ahead for specialist housing for older people” (National Housing Federation and the Housing LIN).

In recent years I have specialised in producing social need reports to support applications for planning approval by developers of specialised accommodation for older people in locations across England, Wales and Scotland. Although most of the 400 or more developments we have supported with need evidence have been successful at first application my work has included appearing as Expert Witness at Appeal when required. I have contributed evidence to successful appeals at Lymington for Lifestory, Harpenden, Sidmouth and Cobham, for Pegasus Life, Brockenhurst for Renaissance Retirement, West Malling, Lower Shiplake and Albourne for Retirement Villages, Malpas, Banstead and Canterbury for McCarthy & Stone, Sonning Common for Inspired Villages and St Albans for Castleoak.

2 Declaration

2.1 The evidence which I have prepared and provide for this appeal () is true and I confirm that the opinions expressed are my true and professional opinion.

3 The Scope of my Evidence

3.1 Referring to my report on need for specialised accommodation in the area of the New Forest District Council appended to this Proof, my evidence argues that planning to meet the needs of older people requires consideration different from that which may apply to other age groups will provide..

3.2 Having explained the methodology I have adopted and why it is to be preferred over other approaches to estimating need for Specialised Accommodation for older people I review data on the current and projected future population of older people

within the New Forest. I offer data on a variety of needs among that older population, which suggest an increasing requirement for specialised accommodation and access to support and care.

3.3 I draw attention to substantial and increasing levels of owner-occupation among older people as a significant driver for the nature of future provision. The volume and profile of current provision is set out and the need for new models and increasing volumes of provision identified.

3.4 Moving on I refer to the context in both local and national policies in relation to developments of this nature.

3.5 I conclude by indicating the levels of provision that would more closely align with the profiles of age, functional incapacity, health status, and tenure that I have enumerated.

4 Methodology

4.1 The methodology adopted to provide an objective measurement of need for specialised accommodation and care within the District as a whole draws on my own work for the Care Services Improvement Partnership at the Department of Health and the Department for Communities and Local Government¹, subsequent industry led guidance to which I contributed², and the work of others in this field³. These are the “toolkits” referred to in the National Planning Practice Guidance 2018 as suitable for estimating the needs of older people within a local population and referenced in NPPG of June 2019.

4.2 I explain why this methodology is to be preferred together with the reasons for the widely adopted alternative, the SHOP@ Tool (referenced in Planning Practice Guidance June 2019) being withdrawn by the Housing LIN; calling into question projections developed using this on-line tool.

4.3 The method of estimating the need for specialised accommodation for older people differs from that used to calculate housing need in the population at large. The methodology for the whole population relies on the estimation of household formation, moderated by historic market data and takes account of economic drivers to arrive at a projected range of future need for housing. It may, for example, moderate the projected level of need for new housing by considering whether under supply may inhibit the prospects for future economic growth. Whilst considering the needs of a whole population, it is primarily driven by the factors such as the impact undersupply will have on the local economy.

4.4 Objective measurement of need for accommodation for older people looks at factors that dispose older people toward a need for specially designed accommodation

¹ More Choice, Greater Voice: a toolkit for producing a strategy for accommodation with care for older people, Communities and Local Government, CSIP & Housing LIN, February 2008.

² Housing in Later Life: planning ahead for specialist housing form older people, Housing LIN, NHF et al, December 2012.

³ SHOP@, Housing LIN & EAC, 2013

and accommodation providing a range of support and care functions. Thus, an inability to manage stairs and steps indicates a requirement for accommodation that is accessible. The inability to shop for groceries and other essentials, indicates a low-level need for support, where as an inability to wash and dress oneself indicates a need for higher levels of personal care.

5 The age profile of the local population

5.1 The profile of the New Forest in relation to the age of its population is strikingly above the national average, with those 65 years of age already approaching 30% of the total population of the district and projected to increase to more than 37% by 2040. As can be seen from the table below this compares with a current national average of 18.54% and a projected national average in 2040 of 23.75%. This is a strikingly aged population.

5.2 The proportion of those in advanced old age, that is 85 years of age or more is even more of a challenge to health and social care authorities as the prevalence of chronic health conditions and functional incapacity in tasks essential to the maintenance of an independent life-style is closely related to chronological age. Those 85 years of age and older will increase in absolute numbers by 6,100 people through the period to 2040 to make up almost 8% of the total population.

Total population, population aged 65 and over and population aged 85 and over as a number and as a percentage of the total population, projected to 2040 - New Forest District compared with England averages

	2020	2025	2030	2035	2040
Total population – New Forest DC	180,500	182,100	183,400	184,800	186,200
Population aged 65 and over New Forest DC	53,600	57,600	63,100	67,300	69,700
Population aged 85 and over New Forest DC	8,700	9,500	11,100	13,900	14,700
Population aged 65 and over as a proportion of the total population New Forest DC	29.70%	31.63%	34.41%	36.42%	37.43%
Population aged 65 and over as a proportion of the total population England Average	18.54%	19.72%	21.45%	22.96%	23.75%
Population aged 85 and over as a proportion of the total population New Forest DC	4.82%	5.22%	6.05%	7.52%	7.89%
Population aged 85 and over as a proportion of the total population England Average	2.50%	2.71%	3.06%	3.73%	3.94%

(Source: www.poppi.org.uk - Office of National Statistics Census Crown Copyright 2020)

5.3 As the table shows the resident population of the New Forest District Council administrative area is a very much older than the average and will bring with it a range of challenges for Housing, Health and Social Care authorities.

6 Indicators of need for specialised accommodation, care and support

6.1 Those finding at least one mobility activity difficult or impossible will increase by around 42% between 2020 and 2040. The impact of these difficulties on the capacity for independent living can be significantly mitigated by appropriate design and flexible delivery of care and support services

6.2 Those having difficulty with one or more domestic tasks will increase between 2020 to 2040 from 15,873 to 21,902, an increase of 38%. A failure to manage these tasks often persuades older people, or their relatives, of the need for a move to a high care setting, such as a Registered Care home, when their needs would be better met in specialised accommodation, such as that proposed in this application.

6.3 Similarly those experiencing difficulty with at least one task of self-care are projected to rise from 15,674 in 2020 to 21,455 in 2040. This may contribute to additional demand for specialised accommodation but will have a direct impact on demand for care home places.

6.4 Throughout the period to 2040 there is predicted to be a 51% increase in the population aged 65 and above that have dementia; with around 81% increase in the 90 years of age and over cohort. These significant rises will again place increasing demand on care and accommodation places.

6.5 A failure to manage many of these domestic and personal care tasks often persuades older people, or their relatives, of the need to move to a high care setting when their needs would be better met in specialised accommodation, such as that proposed in this application.

7 Shaping an appropriate response to the identified need

7.1 I argue that appropriately designed, accessible accommodation with access to flexible support services can mitigate the risks, sustain independence and facilitate the delivery of care in a cost-effective fashion to moderate the demands that will otherwise fall on existing services as a consequence of these trends.

7.2 A fully robust pattern of provision that matches the aspiration of individuals and of public policy that people should be able to age in place requires a number of elements: appropriately designed accommodation, a range of support and care services and specialised provision for those with the highest levels of need for care.

7.3 Where low and moderate needs for care and support are not appropriately met then the phenomenon of upward transference occurs in which, generally under the pressures of some traumatic incident, individuals move to a setting providing a higher level of care than they require. This adds to pressures on the higher levels of provision such as registered care homes and Extra Care developments. An adequate volume

of provision of the kind proposed by the Appellant mitigates these pressures to the benefit of both individuals and the Public Good.

8 Responding to need among older homeowners

8.1 Turning from responses to the range of needs I have demonstrated I argue that whilst public policy has traditionally focused on the needs of those older people who require socially funded rental accommodation, the trend among older people has been toward an increasing level of owner-occupation.

8.2 New Forest follows but exceeds by a wide margin the national trend toward owner-occupation as the dominant tenure for older people. Levels of owner-occupation among older people in the district are very significantly above national averages at 86.12% for those between 65 and 74 years of age. In the oldest age group the level of home ownership may be depressed by lack of options for owner-occupation in specialised accommodation but remains just below 82.56%.

8.3 I show in Section 7 of my appended Report⁴ that the current supply of specialised accommodation, including registered care homes, has been calculated using the Elderly Accommodation Counsel database. Taking tenures together and comparing with the whole population it is clear that levels of provision of specialised housing for older people are significantly below national averages in relation to social rented stock and above national averages in relation to retirement housing offered for market sale.

8.4 Whilst there is a greater than average supply of retirement housing available to homeowners through purchase of a long lease this comes nowhere near reflecting the dominance of owner-occupation among the older population of New Forest.

8.5 There is a consequent shortfall in the level of provision needed to achieve an adequate supply for older homeowners wishing to maintain their tenure when transferring to specialised accommodation.

8.6 For those older people who are owner-occupiers the ratio of provision for retirement housing for sale per thousand is 64.26. Whilst for those older people who are renters the comparable ratio per thousand is 190.87.⁵ This means that older homeowners have proportionately only a third as many properties available to them in any form of specialised accommodation than their peers in rented tenures, which is clearly inequitable.

8.7 The level of provision of bed spaces in Registered Care Homes providing Personal Care is slightly above national averages and the provision of beds registered for the delivery of Nursing Care is more significantly above the national average, as is shown in my appended Report.⁶ This suggests that those with higher levels of need for care are relatively well provided for but that the overall economy of provision is not

⁴ Table 12 on page 22 and Table 13 on Page 23

⁵ Paragraphs 7.6 and 7.7 on page 21 of my appended Report show the calculations.

⁶ Comparing the ratios shown in Table 12 on page 22 with those in Table 13 on page 23.

appropriately balanced in that there are insufficient options for those who are capable of living independently or require only modest levels of support.

8.8 Whilst the Health and Adult Social Care authorities place great emphasis on the development of Extra Care and the need to divert future increasing need for accommodation with care away from Registered Care Homes this does meet all needs. If “upward transference” is to be avoided, that is to say people who require minimal support taking places in facilities offering care and thus limiting the supply available to those who actually require that level of care, additional provision is needed in Supported Housing, particularly to meet the needs of that majority who are homeowners.

8.9 A more adequate level of provision of Retirement Housing, for which we identify a current shortfall in the Market sector of more than 1,800 units to meet the needs of older home-owners in the New Forest, will balance the ambition to increase the availability of Extra Care in all tenures by contributing to a graduated pattern of provision, matched in scale and tenure to the local population of older people.

8.10 On the information available to me I conclude that the only relevant provision that can be counted upon to respond to that deficit are the 44 units of accommodation that will be provided by the scheme at Stanford Hill, Lymington, a permission won at Appeal in May 2021.

8.11 The Local Plan Part 2: Development Management document was produced in 2014 and provides site allocations following the 2009 Core Strategy which has subsequently largely been replaced by Local Plan Part 1. There are residential allocations from the Local Plan Part 2. However, whilst none of which would preclude older persons accommodation none of them seek the delivery of older persons accommodation. Although some of these allocations may still be undelivered as none are identifiable as pipeline sites for older persons accommodation they provide no assurance that any progress in meeting this substantial deficit will be made in the foreseeable future.

8.12 The benefits of facilitating that broad range of need to meet the diversity of personal circumstances and aspirations of the very substantial numbers of older people already within the local population are well documented.

8.13 Appropriately designed accommodation mitigates the risk of falls, a major cause of presentations to Accident and Emergency departments by older people and encourages the prolongation of an active and independent lifestyle.

8.14 Relatively low-level support services stress the maintenance and even enhancement of ability rather than compounding disability. They provide re-assurance both to residents and their family members.

8.15 An environment that maintains independence whilst offering the opportunity of shared activities and the interactions that arise in the context of communal living contribute to physical, mental and emotional well-being, combatting loneliness and isolation. All these reduce the demands made on primary health care services and adult social care services.

8.16 More broadly the provision of appropriate and attractive options that encourage older homeowners to release their existing property, which in the overwhelming majority of cases they will be under-occupying, allows for movement within the local housing market and the more efficient use of the existing housing stock.

8.17 For the older home owners of the New Forest District Council area the outcomes from failing to make such a range of options available are the opposites of these positive outcomes: older people struggle to maintain their independence in properties that become increasingly unsuited to their needs, exposed to avoidable risk, frequently isolated and lonely, with consequences for increasing levels of demand on health and social care services.

9 Conclusions

9.1 The most pressing priority, driven by demography, need, tenure, and policy imperatives is to increase the availability of all categories of specialised accommodation for older homeowners. Recent or impending additions to that stock, whilst welcome, still leave a substantial deficit in provision.

9.2 The provision of a more adequate supply of retirement accommodation of all kinds for homeowners will provide an environment of choice in which independence can be sustained and transfer to expensive Registered Care postponed or avoided.

9.3 In the absence of appropriate, contemporary accommodation options pressures will increase on these higher-end services, such as Registered Care Homes providing Personal Care and Registered Care Homes providing Nursing Care.

9.4 The proposed development will both respond to need within the existing resident population and provide substantial public benefit.

9.4 In conclusion I identify five key contributions that the proposed development:

- It will respond to the accommodation needs and aspirations of the substantially increasing number of older people in the area.
- Through sound design and appropriate facilities and services it will provide an environment in which quality of life will be enhanced, independence maintained and the conditions and risks characteristic of advanced old age will be mitigated.
- It will assist in the renewal of the housing stock designed to meet the needs of older people and in addressing the tenure imbalance found in the current pattern of provision.
- It will offer a robust pattern of provision to maintain its support for the resident population as individuals age and exhibit increased levels of need.
- It will help deliver the policy aspirations of Hampshire County Council and its health partners in responding appropriately to the levels of need identified in my appended report.

**Appendix to Nigel Appleton's Proof of Evidence:
Schedule of appeals in which Nigel Appleton of Contact Consulting has provided evidence**

Decision date	Location	Appeal reference	Client	Inspector	Decision
5th March 2014	Land to the north of Alfrey Close, Southbourne, West Sussex, PO10 8E	APP/L3815/A/13/2198103	Hallam Land Management Ltd	Gloria McFarlane	Allowed
16th February 2015	Land at Gradwell End, Mill Lane, South Chailey, Lewes, East Sussex	APP/P1425/A/14/2220421	Retirement Villages	Richard McCoy	Allowed
19th June 2015	Land east of Bramshott Place Village, south of Hewshott Lane, Liphook, Hampshire	APP/M1710/A/14/2219671	Helical (Liphook) Ltd	Christina Downes	Allowed
19th January 2016	James Marshall House, Harpenden, Hertfordshire AL5 2JB	APP/B1930/W/15/3004758	Pegasus Life	Ava Wood	Allowed
17th January 2017	Tettenhall College, Wood Road, Wolverhampton WV6 8QX	APP/D4635/W/16/3150728	YourLife	Jennifer A Vyse	Allowed
26th April 2017	Watersplash Hotel, The Rise, Brockenhurst SO42 7ZP	APP/B9506/W/16/3162888	Pegasus Life	Stephen Hawkins	Allowed
25th July 2017	59 The Broadway, Amersham, Buckinghamshire HP7 0HL	APP/X0415/W/17/3167665	YourLife	David Reed	Allowed
22nd January 2018	The Knowle, Station Road, Sidmouth, Devon, EX10 8HL	APP/U1105/W/17/3177340	Pegasus Life	Michael Boniface	Allowed
19th December 2018	Land to the rear of 237-259 London Road, West Malling, Kent ME19 5AD	APP/H2265/W/18/3202040	Retirement Villages	Robert Mellor	Allowed
14th February 2019	The Glashaus, 74 Portsmouth Road, Cobham, KT11 1HY	APP/K3605/W/18/3200236	Pegasus Life	S. J. Buckingham	Allowed

15th February 2019	Oak Tree Nurseries, Stroude Road, Virginia Water, GU25 4D	APP/Q3630/W/18/3195463	Retirement Villages	Michael Boniface	Dismissed
26th February 2019	The Cedars, Old Hall Street, Malpas SY14 8NE	APP/A0665/W/18/3200248	McCarthy & Stone	Elizabeth Pleasant	Allowed
4 October 2019	13-15a Alderton Hill, Loughton, Essex IG10 3JD	APP/J1535/W/18/3203410	Elysian Residences	David Reed	Dismissed
Decision date	Location	Appeal reference	Client	Inspector	Decision
14th October 2019	Land to the east of Reading Road, Lower Shiplake, Oxfordshire	APP/Q3115/W/19/3220425	Retirement Villages	Kenneth Stone	Allowed
21st October 2019	Land at The Elms, Upper High Street, Thame OX9 2DN	APP/Q3115/W/19/3228431	Rectory Homes	R J Jackson	Dismissed
11th December 2019	Heron Court, 198 Brentwood Road, Herongate, CM13 3PN	APP/H1515/W/18/3219321	Runwood Homes	Sarah Dyer	Dismissed
9th January 2020	Land to the rear of Burston Garden Centre, North Orbital Road, Chiswell Green, St Albans, AL2 2DS	APP/B1930/W/19/3235642	Castleoak Care Partnerships Ltd	Claire Searson	Dismissed
14 th February 2020	Cross Farm House, Crookham Village GU51 5SS	APP/N1730/W/18/3216181	Crookham Care Village Ltd	Richard Clegg	Dismissed
21 st February 2020	King's Ride, Camberley GU15 4LJ	APP/D3640/W/17/3172651	Court House Care Ltd	Andrew Dawe	Dismissed
18th March 2020	Priory School, Bolters Lane, Banstead, Surrey SM7 2AJ	APP/L3625/W/19/3240562	McCarthy & Stone	Paul Jackson	Allowed
16th April 2020	35 - 41 New Dover Road, Canterbury	APP/J2210/W/19/3226136	McCarthy & Stone	Joanna Gilbert	Allowed
30th April 2020	Former Imperial College Private Ground, Udney Park Road, Teddington TW11 9BB	APP/L5810/W/18/3205616	Quantum Teddington Development Ltd	R J Jackson	Dismissed
11th September 2020	Site of the former Hazeldens Nursery, London Road,	APP/D3830/W/19/3241644	Retirement Villages	Christina Downes	Allowed

	Albourne, West Sussex BN6 9BL				
27th May 2021	Land at Wellcross Farm, Broadbridge Heath, Horsham RH13 0TP	APP/Z3825/W/20/3262938	Inspired Villages	M Shrigley	Allowed
8th June 2021	Stanford Hill, Lymington, SO41 8DE	APP/B1740/W/20/3265937	Lifestory Group	G J Fort	Allowed
25th June 2021	Little Sparrows, Sonning Common, Oxfordshire RG4 9NY	APP/Q3115/W/20/3265861	Inspired Villages	Harold Stephens	Allowed
Decision date	Location	Appeal reference	Client	Inspector	Decision
31st January 2022	Broke Hill Golf Course, Sevenoaks Road, Sevenoaks, TN14 7HR	APP/G2245/W/21/3273188	Quinn Estates Ltd	Stephen Wilkinson	Dismissed
31st January 2022	Burston Garden Centre, North Orbital Road, Chiswell Green, St Albans, AL2 2DS	APP/B1930/W/21/3279463	Castleoak Care Developments	Tom Gilbert-Wooldridge	Allowed