

Iceni Projects Update Sheet

Implications and
Opportunities for the
Older Person's Housing
Sector



A new policy in the Further Alterations to the London Plan provides a significant opportunity to deliver much needed older person care and accommodation within the Capital.

Background

Like much of the rest of the Country, the number of older people in London is expected to grow rapidly in the coming years and this will significantly increase the demand for older person care and accommodation. Population projections for the Capital covering the period 2011 to 2031 show:

- The number of people aged 65 and above is expected to increase by 64%;
- There will be an additional 89,000 people aged 90 and above; and
- London's older population will increase at twice the rate of the Capital as a whole.

Clearly this does not mean that everyone aged 65 and above will need some form of specialist housing. However, the GLA's evidence suggests that up to 4,200 specialist housing units for older people per annum will be required over the next 10 years. This level of need cannot be addressed by simply delivering more general market housing units which meet the Lifetime Homes standards. The key to addressing the challenge of an ageing population is to offer choice – and not just a choice between 'care at home' or 'care in a home'.

Borough-Specific Benchmark Targets for Specialist Housing for Older People

Delivery of older person care and accommodation is currently well below the level of need – around a third of the units required in London are being delivered. This has sparked the Mayor in to action and the Further Amendments to the London Plan include 'indicative requirement benchmarks' for the delivery of 'specialist housing for older people' for every Borough, based on tenure, including private sale. The London-wide target is 3,900 units per annum over the period 2015-2025 and this is shown in the table overleaf.

Iceni Projects

Flitcroft House
114–116 Charing Cross Road
London WC2H 0JR

T 020 3640 8508

F 020 3435 4228

www.iceniprojects.com

[@iceniprojects](https://twitter.com/iceniprojects)



Jamie Sullivan, Associate

jsullivan@iceniprojects.com

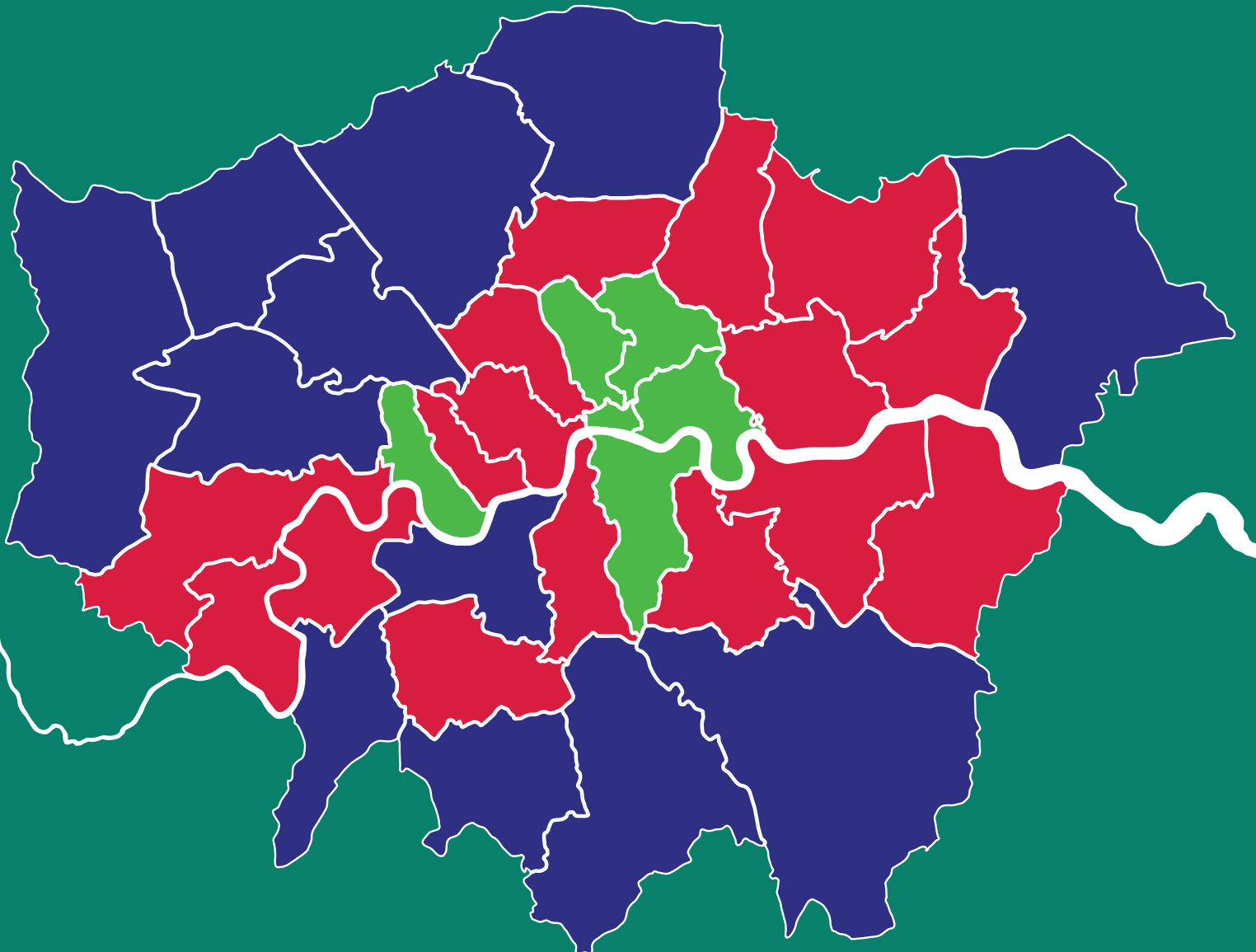
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Table 1 - Extract from the London Plan Showing Benchmark Targets for Specialist Housing for Older People

London Boroughs	Private Sale	Intermediate Sale	Affordable Rent	Total
Barking and Dagenham	50	15	5	70
Barnet	155	60	10	225
Bexley	90	45	0	135
Brent	105	35	35	175
Bromley	140	65	0	205
Camden	65	20	15	100
City of London	0	0	0	0
Croydon	140	55	0	195
Ealing	135	40	5	180
Enfield	120	50	0	170
Greenwich	65	20	0	85
Hackney	25	10	20	55
Hammersmith and Fulham	45	15	0	60
Haringey	80	20	0	100
Harrow	110	40	0	150
Havering	135	50	0	185
Hillingdon	115	40	0	155
Hounslow	95	30	20	145
Islington	30	10	50	90
Kensington and Chelsea	60	20	20	100
Kingston upon Thames	70	25	0	95
Lambeth	55	15	5	75
Lewisham	65	25	25	115
Merton	80	30	0	110
Newham	55	15	5	75
Redbridge	75	45	0	120
Richmond upon Thames	105	30	0	135
Southwark	45	15	55	115
Sutton	70	35	0	105
Tower Hamlets	25	10	35	70
Waltham Forest	65	25	0	90
Wandsworth	80	25	0	105
Westminster	70	20	20	110
LONDON TOTAL	2,620	955	325	3,900

The heat map shows that the highest targets for private market units are generally within the outer Boroughs of London.

Plan 1 - Heat Map of London Boroughs Benchmark Targets



- Benchmark target of <100 units of private housing with care per year
- Benchmark target of 50 - 100 units of private housing with care per year
- Benchmark target of >50 units of private housing with care per year

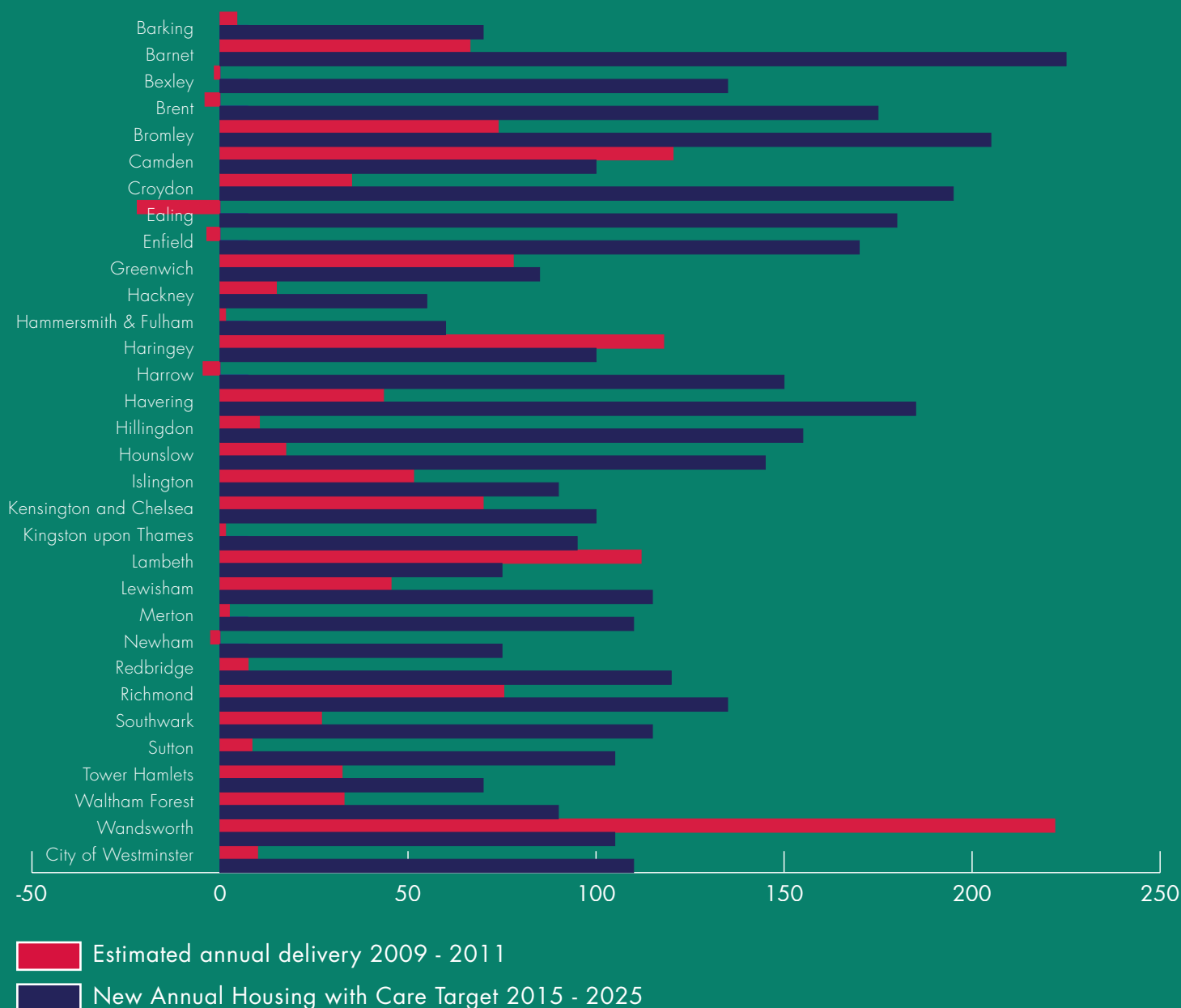
Delivery rates are well below new targets

Whilst the central boroughs generally have lower targets, many of these authorities also have much lower levels of delivery. Traditionally developers of older person care and accommodation find it even harder to compete for available sites in these locations. However, the table comparing delivery rates of private market housing units with the new benchmark targets, shows that nearly all local authorities are struggling to deliver anywhere near the level of need as shown by the table

The data used only focuses on the targets for private older person care and accommodation - it demonstrates that:

- If the delivery rate for the period 2009 – 2011 was carried forward then only three authorities would have met their targets in the first year;
- Many local authorities have negative delivery rates as the figures take account of the demolition of outdated care homes; and
- Very few authorities are even delivering half of their new targets and a significant step change is required.

Table 2 - Comparing Delivery and Targets



How will London Boroughs Respond?

It is important to note that the policy is driven not just by need, but also addresses changes in national planning policy. The NPPF now explicitly requires local plans to assess the need for specialist housing for older people and plan for it accordingly. The emerging London Plan policy represents a more proactive approach to meeting the requirements of the NPPF than we have seen elsewhere in the Country. London boroughs don't completely ignore this issue in planning policy and there are some excellent examples in the Capital for delivering older person housing. However, the coverage is often patchy and this new policy will essentially force the hand of all London boroughs to address this issue in detail at the local level.

There are numerous ways of doing this, but the most obvious is to allocate specific sites backed by a robust planning policy on how to determine subsequent applications. However, it will be important that developers are involved in the process to ensure that these policies are viable and deliverable, particularly as different housing and care products require different locations.

What are London Boroughs Doing in Next 12 Months?

A number of London boroughs are likely to consult on local plan or policy documents which will allocate sites in the coming 12 months (listed below). When preparing these documents local authorities will have

MEETING THE CHALLENGE OF DELIVERING OLDER PERSON CARE AND ACCOMMODATION FOR AN AGING SOCIETY

to consider whether it is appropriate to allocate specific sites for older person care and accommodation to make a contribution to their benchmark target. We strongly recommend that developers working in these areas and seeking to deliver this form of development approach these local authorities to discuss the potential for identifying new sites. Icen Projects will be happy to assist with discussions with local authorities.

- Bexley – Bexley Detailed Policies and Sites Local Plan
- Camden – New Local Plan
- Croydon – Local Plan Partial Review
- Enfield – Central Leaside AAP
- Greenwich – Site Specific Allocations DPD
- Hackney – City Fringe Opportunity Area Planning Framework
- Hammersmith & Fulham – Draft Local Plan
- Haringey – Site Allocations DPD and Tottenham AAP
- Havering – Local Plan
- Islington – City Fringe Opportunity Area Planning Framework
- Kingston-upon-Thames – Hogsmill Valley DPD
- Lambeth – New Local Plan
- Newham – Detailed Sites and Policies DPD
- Redbridge – Draft Local Plan
- Southwark – New Southwark Local Plan
- Tower Hamlets – City Fringe Opportunity Area Planning Framework

In addition, new Housing Zones may have significant potential to deliver older person care and accommodation. Local authorities may seek to set targets for the delivery of this form of development within the new Housing Zones in order to help them meet their benchmark targets. We understand that the following Housing Zone bids have been submitted:

- Brent – Alperton/Wembley
- Ealing – Southall
- Enfield – Meridian Water
- Haringey – Tottenham Hale
- Waltham Forest – South Poplar
- City of Westminster – Clapham Station, Winstanley and York Road Estate



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