



Housing LIN

*Connecting people, ideas and resources*

# Assessment of the demand for specialist housing and accommodation for older people in Wales

Report for the Welsh Government

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THE HOUSING LEARNING & IMPROVEMENT NETWORK

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## Executive summary

This is a report from the Housing Learning & Improvement Network (Housing LIN)<sup>1</sup>. It identifies current provision of and future demand to 2035 for different types of specialist housing and accommodation for older people.

### Context

Wales is an ageing society, with 841,645 people aged over 60<sup>2</sup>, c. 27% of the population. This is set to increase to over 1 million by 2030. The population of over 75s in Wales is expected to increase by over 54% between 2018 and 2035.

The Welsh Government's commitments in the Programme for Government, set out in Taking Wales Forward (2016) which sets out the high level objectives of the government, and Prosperity for All (2017) which sets out specific commitments in relation to the government's objectives, include commitments in relation to older people through both housing and social care themes. The new Older People's Commissioner for Wales has raised the challenge of addressing the needs and aspirations of older people in Wales and to widen the range of housing choices available to older people<sup>3</sup>.

### Approach

The Housing LIN has used its 'Strategic Housing for Older People' model, SHOP@<sup>4</sup> to estimate future demand for specialist housing and accommodation for older people.

Contextual evidence, such as local authority commissioning plans and evidence of older people's housing preferences, and the Housing LIN's experience of working with local authorities in relation to specialist accommodation for older people, has been used as a basis for making reasoned assumptions in relation to estimating demand for specialist housing and accommodation for older people, for each local authority to 2035.

The specialist housing and accommodation services covered by this demand assessment are defined as (examples are shown at Annexe 4):

- **Housing for Older People:** contemporary sheltered housing and age-designated housing for social rent and retirement housing for sale. This will include schemes with on-site staff support, those with locality-based support services and schemes with no associated support services.

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<sup>1</sup> [www.housinglin.org.uk](http://www.housinglin.org.uk)

<sup>2</sup> <https://statscymru.llyw.cymru/Catalogue/Population-and-Migration/Population/Estimates/Local-Authority/populationestimates-by-localauthority-region-age>

<sup>3</sup> <https://www.housinglin.org.uk/blogs/A-window-of-opportunity-for-change/>

<sup>4</sup> <https://www.housinglin.org.uk/Topics/browse/HousingExtraCare/ExtraCareStrategy/SHOP/SHOPAT/>

- **Housing with Care:** includes extra care housing for social rent and extra care housing for sale (often called 'assisted living' in the private sector), with 24/7 care available on-site.
- **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.
- **'Step up'** is an intermediate care function to receive patients from home/community settings to prevent unnecessary acute hospital admissions or premature admissions to long term care. **'Step down'** is an intermediate care function to receive patients from acute care for rehabilitation and to support timely discharge from hospital.

This is a desktop exercise using secondary data to produce high level estimates of future demand for specialist housing and accommodation for older people. Therefore this assessment should be treated as a *guide* to future demand for specialist housing and accommodation for older people. Refining the assessment would require further research beyond the scope of the brief for this work, for example qualitative research with older people regarding their housing preferences; detailed discussion with local authorities and other stakeholders regarding localised factors that may affect future demand.

### **Estimate of future demand for specialist housing and accommodation**

This assessment of future demand estimates that across Wales there is likely to be a shortfall by 2035 of:

- Approximately 15,000 units of **housing for older people**, specifically:
  - 5,000 units of age-designated social housing
  - 5,000 units of contemporary sheltered housing for social rent
  - 5,000 units of retirement housing for sale
- Approximately 5,000 units of **housing with care:**
  - 3,500 units of extra care housing for social rent
  - 1,500 units of extra care housing for sale (including shared ownership)
- Approximately 7,000 **nursing care** beds.
- No net need for additional **residential care** beds;
- Approximately 120 **step up/step down** housing units

## 1. Introduction

1.01. This is a report from the Housing Learning & Improvement Network (LIN)<sup>5</sup> based on a brief from and discussion with civil servants from the Welsh Government.

1.02. The brief is to identify current provision of and future demand to 2035 for different types of specialist housing and accommodation for older people. The full brief is shown at Annexe 1.

1.03. This report contains:

- A summary of the relevant policy context that is influencing the development of specialist housing and accommodation for older people.
- The method used to estimate future demand for specialist housing and accommodation for older people including the assumptions used.
- The caveats that apply to a quantitative desktop assessment of future demand for specialist housing and accommodation for older people and its use.
- Estimated future demand for specialist housing and accommodation for older people to 2035 for each local authority.
- A summary of future demand for specialist housing and accommodation for older people to 2035 across Wales.

### **About the Housing LIN**

1.04. Previously responsible for managing the Department of Health's £227 million Extra Care Housing Fund, the Housing LIN is the leading 'learning lab' for a network of 25,000+ housing, health and social care professionals across England, Scotland and Wales. The Housing LIN both draws on the expertise within this network and is recognised and supported nationally and locally by key industry players, research and professional bodies.

1.05. In Wales, Housing LIN Cymru is a vibrant network that meets regularly and produces a range of resources that exemplify best practice in creating a better range of housing and care choices for older and disabled people. More about our learning and improvement activities can be found at:

<https://www.housinglin.org.uk/HousingRegions/Wales/>

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<sup>5</sup> [www.housinglin.org.uk](http://www.housinglin.org.uk)

## 2. Context: housing an ageing population

2.01 Wales is an ageing society, with 841,645 people aged over 60, c.27% of the population<sup>6</sup>. This is set to increase to over 1 million by 2030. The population of over 75s is expected to increase by 55% between 2018 and 2035.

2.02 In this context, the new Older People's Commissioner for Wales, Heléna Herklots, has raised the challenge of addressing the housing needs and aspirations of older people in Wales. In her guest blog for the Housing LIN<sup>7</sup> she calls for an improved range of housing choices for older people so that Wales can be the best place in the world to grow older.

2.03 There is undoubtedly 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.

2.04 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.

2.05 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"*<sup>8</sup>. One of the outcomes within the 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."*

2.06 Welsh Government's commitments in the Programme for Government, set out in Together for Wales (2016) which sets out the high level objectives of the government, and Prosperity for All (2017) which sets out specific commitments in relation to the government's objectives, include commitments in relation to older people through both housing and social care themes. From Prosperity for All specifically these include:

- *Good housing plays a critical role in healthy, independent ageing. Enabling people to stay in their homes for longer brings significant health, social and economic benefits. We need the right kind of housing in the right place that matches people's needs. In some cases these will be purpose-built, in others, through adaptations to existing homes.*

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<sup>6</sup> Ibid

<sup>7</sup> <https://www.housinglin.org.uk/blogs/A-window-of-opportunity-for-change/>

<sup>8</sup> Welsh Government Strategy for Older People in Wales 2013 – 2023

- *Incentivise housing providers to build homes which respond to the challenges of an ageing population and which enable people to live independently and safely in their own homes for longer.*
- *Build more purpose built housing developments that would allow people to live independently within a protected and sheltered environment, located close to easily accessible public transport.*

2.07 The report by the Expert Group for Housing an Ageing Population in Wales for the Welsh Government, published in 2017 sets out specifically 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<sup>9</sup>. Chaired by Professor Judith Phillips, formerly at the University of Swansea (now at the University of Stirling), the Expert Group's 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.
- 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' HAPPI<sup>10</sup> (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.
- 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.

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<sup>9</sup> 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>

<sup>10</sup> <https://www.housinglin.org.uk/Topics/browse/Design-building/HAPPI/>

- 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.

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

2.09 More recently, a tri-nation report<sup>11</sup> from the University of Stirling, recommends that housing should play a central role in the provision of services for older people. It also calls for new adaptable and affordable housing to be built; investment in early intervention; and meaningful consultation with older people. It also identified characteristics unique to Wales, including:

- The diversity of location in relation to the ageing population with concentrations of older people in rural areas and the Valley communities in South Wales.
- A high proportion of population provides intense unpaid care in the UK, particularly in post-industrial areas of South Wales.
- Other 'mission critical' areas identified include:
  - understanding the needs and preferences of older people.
  - increasing choice in the housing market
  - using technology to be innovative in housing design.
  - ensuring older people's needs are prioritised in planning, and
  - making housing more affordable and incentivising change.

2.10 There has been increasing interest in housing and health partnerships. A 2015 Housing LIN state of the nation report on extra care housing in Wales<sup>12</sup> found that there are limited examples of extra care housing services working in partnership with health, and there is the potential to offer, for example:

- Housing based 'step-up or step-down' services which prevent hospital admission or facilitate hospital discharge.
- Facilities in which to base community health services in local communities.
- A base for public health initiatives working with local organisations and local communities.

2.11 The Welsh Government's Integrated Care Fund (formerly the Intermediate Care Fund) is a mechanism to support the delivery of various requirements of the Social Services and

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<sup>11</sup><https://www.housinglin.org.uk/assets/Resources/Housing/OtherOrganisation/HousingAndAgeingReport.pdf>

<sup>12</sup><https://www.housinglin.org.uk/Topics/type/Extra-Care-Housing-in-Wales-A-state-of-the-nation-report/>



Well-being (Wales) Act 2014 Act and help Regional Partnership Boards (RPB) deliver on the vision contained in 'A Healthier Wales: Our plan for health and social care'<sup>13</sup>.

2.12 Other commitments in Prosperity for All relate to integrating capital and service planning, both of which can contribute significantly to accommodation solutions for older people which are located close to services as well as supported by integrated public services. These commitments include:

- *Deliver a tangible shift in the provision of health and care services into communities, and away from hospitals, and shift the emphasis from treating illness to well-being.*
- *Co-ordinate housing, health and social care capital programmes to provide innovative, affordable, accommodation and nursing care building on the Integrated Care Fund approach.*
- *Require co-ordinated planning of new homes, facilities and infrastructure by local authorities, health bodies, housing associations and other key partners.*

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<sup>13</sup> <https://gov.wales/sites/default/files/publications/2019-04/in-brief-a-healthier-wales-our-plan-for-health-and-social-care.pdf>

### 3. Demand assessment for specialist housing and accommodation for older people

#### Approach

- 3.01 The Housing LIN has used its 'Strategic Housing for Older People' model, SHOP@<sup>14</sup> to estimate future demand for specialist housing and accommodation for older people. The Housing LIN originally developed SHOP@ with the English Association of Directors of Adult Social Services (ADASS) and Elderly Accommodation Counsel (EAC) for the UK Government Department of Health's Market Development Forum to support local authorities to forecast demand for older people's housing and accommodation.
- 3.02 The SHOP@ housing need tool has been updated over time so that the approach refines the previous use of national generic 'benchmarks' to predict future need at local authority level.
- 3.03 A comparative analysis has been produced that compares the current supply or 'prevalence' of different types of specialist housing and accommodation for older people (age-designated/sheltered housing for rent, private retirement housing for sale, extra care housing for rent and for sale, residential care provision and nursing care provision) in Wales by comparing current provision across all 22 local authorities along with the all Wales averages for provision of specialist older people's housing and accommodation. This identifies how provision in each Welsh local authority compares relative to the other local authorities and across Wales generally (sections 3.08-3.11).
- 3.04 To make this housing need assessment bespoke to the Welsh context we have considered, as far as data is available, the relevant trends and other evidence in relation to influencing future need for specialist housing and accommodation for older people (Annexe 2), for example:
- Published local authority and Regional Partnership Board (RPB) market position statements and commissioning strategies that refer to estimates, targets or similar statements in relation to housing and accommodation for older people.
  - Local authority published statements in relation to current and planned use of, for example, residential and nursing care beds for older people.
  - Evidence that is available in relation to the use of and development of 'step up/step down' housing units, e.g. from published local authority and Regional Partnership Board documents.
  - The evidence from any available qualitative research with older people in relation to future housing and accommodation preferences from Wales and across the UK, for example the Housing LIN has undertaken such research recently in Cardiff/Vale of Glamorgan and with other local authorities across Britain.

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<sup>14</sup> [www.housinglin.org.uk/SHOP](http://www.housinglin.org.uk/SHOP)

3.05 Quantitative estimates have been generated of future demand for specialist housing and accommodation for older people based on the following approach:

- Data showing the existing provision and prevalence of specialist housing and accommodation for older people in each Welsh local authority and aggregated at Wales level (sections 3.08-3.11; table 2). We have this data available through a partnership with the Elderly Accommodation Counsel<sup>15</sup>.
- The specialist housing and accommodation services covered by this demand assessment are defined as (examples are shown at Annexe 4):
  - **Housing for Older People:** contemporary sheltered housing and age-designated housing for social rent and retirement housing for sale. This will include schemes with on-site staff support, those with locality-based support services and age-designated housing with no associated support services (other than a telecare service).
  - **Housing with Care:** includes extra care housing for social rent (and shared ownership) and extra care housing for sale (often called 'assisted living' in the private sector), with 24/7 care available on-site.
  - **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.
  - **'Step up'** is an intermediate care function to receive patients from home/community settings to prevent unnecessary acute hospital admissions or premature admissions to long term care. **'Step down'** is an intermediate care function to receive patients from acute care for rehabilitation and to support timely discharge from hospital.
- 2014-based Welsh Government population data<sup>16</sup>. SHOP@ focuses on estimates using the projected population of older people up to 2035. The SHOP@ model typically uses the 75+ population as the average age benchmark for most likely use of age designated and specialist housing and accommodation for older people (table 1).
- Estimated prevalence rates used as 'benchmarks' within SHOP@ have been based on the review of local authority/RPB plans and documents (where available) and the available evidence in relation to older people's housing and accommodation preferences. i.e. reasoned assumptions based on the factors that are likely to affect the future demand for older people's age designated/sheltered housing for social rent; private retirement housing; extra care housing; residential care; nursing care; expressed per 1000 population aged 75+ (sections 3.12-3.16).

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<sup>15</sup> <http://www.housingcare.org/index.aspx>

<sup>16</sup> Stats Wales (2014). 2014-based local authority population projections for Wales, 2014 to 2039.

- Using these reasoned assumptions (section 3.16), estimates of future demand for specialist housing and accommodation are generated for each local authority based on likely prevalence for each type of housing/accommodation multiplied by the change in the projected 75+ population to 2035.
- Deprivation data<sup>17</sup> is used to identify the relative economic status of people within each local authority area to estimate housing need in terms of the mix of tenures, both for sale and to rent (section 3.16; Annexe 3). However, we are aware from our work in Wales and discussion with RSLs and local authorities that demand for shared ownership and outright ownership models of specialist older people's housing has been relatively limited so we draw on this evidence in making assumptions about tenure breakdowns in relation to future demand.

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<sup>17</sup> Stats Wales (2014). Welsh Index of Multiple Deprivation.

## Demography

Table 1. Population projections for over 75s in the 22 Welsh local authorities and Wales overall<sup>18</sup>, 2018-2035.

Local Authority	2018	2025	2030	2035
Blaenau Gwent	6,314	7,838	8,421	9,146
Bridgend	13,298	16,960	18,830	20,766
Caerphilly	15,253	19,943	22,094	24,177
Cardiff	23,565	29,710	33,986	38,998
Carmarthenshire	20,212	25,780	28,646	31,360
Ceredigion	8,002	10,941	12,064	12,950
Conwy	15,650	19,185	20,871	22,818
Denbighshire	10,309	13,212	14,463	15,608
Flintshire	14,423	19,650	21,905	23,783
Gwynedd	13,701	17,151	18,434	19,732
Isle of Anglesey	8,141	10,388	11,291	12,194
Merthyr Tydfil	4,928	6,173	6,895	7,734
Monmouthshire	10,873	14,416	16,397	18,112
Neath Port Talbot	13,512	16,958	19,022	21,113
Newport	12,391	15,170	16,420	18,265
Pembrokeshire	14,677	18,992	20,975	22,591
Powys	16,829	21,952	24,378	26,365
Rhondda Cynon Taf	20,139	25,412	27,519	29,793
Swansea	23,116	28,462	31,168	34,092
Torfaen	8,667	11,016	12,271	13,469
Vale of Glamorgan	11,730	16,108	18,181	20,238
Wrexham	12,192	15,932	17,807	19,435
<b>WALES</b>	<b>297,922</b>	<b>381,350</b>	<b>422,039</b>	<b>462,740</b>

3.06 The population of over 75s in Wales is expected to increase by over 54% between 2018 and 2035.

3.07 A recent report by the University of Bangor<sup>19</sup> identified that older people are the largest and fastest growing demographic section of the population in Wales, highlighting that 1 in 4 people will be aged 65 and over by 2036, and that the over 85 population will increase most. This report makes the economic argument for investing in prevention at different stages of the life course, in particular, in relation to older people.

<sup>18</sup> Welsh Government (2014). 2014-based local authority population projections for Wales, 2014 to 2039.

<sup>19</sup> Edwards, R.T. *et al.* (2018). Living well for longer: The economic argument for investing in the health and wellbeing of older people in Wales.

## Existing provision and comparative analysis

3.08 A comparative analysis has been produced that shows the current provision (units/beds) and 'prevalence' of the different types of specialist housing and accommodation for older people under consideration (older people's housing for rent, older people's retirement housing for sale, housing with care - i.e. extra care housing - for rent and for sale, residential care and nursing care) in all local authorities. Prevalence is the number of units/beds per 1,000 population aged 75+ (using the 2018 75+ population from table 1) in a local authority/nationally. Table 2 identifies how existing provision in all Welsh local authorities for housing for older people, housing with care, residential care and nursing care compares between local authorities and with the all Wales averages (for current provision and prevalence). The current provision (units/beds) in table 2 is based on data from the Elderly Accommodation Counsel (EAC), except where the Housing LIN has been supplied with data directly from a local authority<sup>20,21</sup>. Data from EAC has been used as it best matches the definitions of specialist housing and accommodation for older people (paragraph 3.05). The Welsh Government also publishes national statistics in relation to sheltered housing and extra care housing<sup>22</sup>; the figures in table 2 in the third category are for extra care housing units where there is small difference between Welsh Government statistics and the EAC data, most likely accounted for by either slightly different definitions or the timing of the data capture. The figures in table 1 in the first category are higher than the Welsh Government statistics for sheltered housing, reflecting that the EAC definition is slightly broader than 'sheltered housing' and will include some other age designated housing, for example that the landlord may no longer define as sheltered housing. The Housing LIN is aware that some former sheltered housing has been 're-categorised' in this way but may be still designated for older people.

3.09 For housing for older people (social rent), the average Welsh prevalence is 92 units per 1,000 population 75+. For housing for older people (private), the average Welsh prevalence is 14 units per 1,000 population 75+. The overall prevalence rate for housing for older people is 106 units per 1,000 population 75+.

3.10 For housing with care (social rent), the average Welsh prevalence is 8 units per 1,000 population 75+. For housing with care (private), the average Welsh prevalence is 2 units per 1,000 population 75+. The overall prevalence rate for housing with care is 10 units per 1,000 population 75+.

3.11 For residential care the average Welsh prevalence is 38 beds per 1,000 population 75+. For nursing care the average Welsh prevalence is 36 beds per 1,000 population 75+.

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<sup>20</sup> Housing LIN (2018). Assessment of Older Person's Housing and Accommodation including with Care and Care Ready: For Cardiff & Vale of Glamorgan Regional Partnership Board.

<sup>21</sup> Housing LIN (2018). Assessment of Specialist Housing and Accommodation Need for Older People in West Wales for West Wales Care Partnership.

<sup>22</sup> <https://gov.wales/sites/default/files/statistics-and-research/2019-08/social-landlord-housing-stock-and-rents-31-march-2019-906.pdf>

Local authority	Housing for older people (social rent)		Housing for older people (private for sale)		Housing with care (social rent)		Housing with care (for sale)		Residential care		Nursing care	
	Units	Prevalence	Units	Prevalence	Units	Prevalence	Units	Prevalence	Beds	Prevalence	Beds	Prevalence
Blaenau Gwent	873	138	0	0	85	13	0	0	137	22	267	42
Bridgend	561	42	174	13	84	6	0	0	559	42	392	29
Caerphilly	1,494	98	36	2	128	8	0	0	433	28	436	29
Cardiff	1,814	77	1,055	45	157	7	110	5	711	30	1,051	45
Carmarthenshire	2,912	144	216	11	189	9	0	0	1,044	52	505	25
Ceredigion	411	51	63	8	48	6	0	0	316	39	271	34
Conwy	1,781	114	600	38	159	10	204	13	713	46	635	41
Denbighshire	974	94	170	16	91	9	48	5	792	77	294	29
Flintshire	2,357	163	101	7	143	10	43	3	533	37	304	21
Gwynedd	872	64	86	6	217	16	16	1	570	42	612	45
Isle of Anglesey	724	89	31	4	117	14	0	0	441	54	177	22
Merthyr Tydfil	429	87	0	0	60	12	0	0	198	40	140	28
Monmouthshire	859	79	275	25	21	2	36	3	214	20	351	32
Neath Port Talbot	945	70	0	0	115	9	0	0	374	28	632	47
Newport	936	76	186	15	161	13	0	0	456	37	465	38
Pembrokeshire	1,046	71	73	5	128	9	0	0	479	33	483	33
Powys	2,077	123	88	5	40	2	18	1	550	33	509	30
Rhondda Cynon Taf	1,547	77	0	0	60	3	0	0	725	36	816	41
Swansea	2,175	94	746	32	136	6	86	4	695	30	1,127	49
Torfaen	1,136	131	42	5	35	4	0	0	332	38	316	36
Vale of Glamorgan	625	53	204	17	42	4	0	0	464	40	462	39
Wrexham	880	72	36	3	87	7	27	2	689	57	518	42
<b>WALES</b>	<b>27,428</b>	<b>92</b>	<b>4,182</b>	<b>14</b>	<b>2,303</b>	<b>8</b>	<b>588</b>	<b>2</b>	<b>11,425</b>	<b>38</b>	<b>10,763</b>	<b>36</b>

Table 2. The existing provision of specialist housing and accommodation for older people in all 22 local authorities and Wales overall (2018/19).  
(Source: Elderly Accommodation Counsel)

## Contextual data and assumptions

3.12 We have drawn on evidence where available from:

- Published local authority and Regional Partnership Board (RPB) market position statements and commissioning strategies that refer to estimates, targets or similar statements in relation to specialist housing and accommodation for older people.
- Local authority published statements in relation to current and planned use of, for example, residential and nursing care beds for older people.

3.13 Tables 70-91 (Annexe 2) summarise published evidence in relation to commissioning and development intent of the 22 local authorities regarding housing for older people, housing with care, residential care and nursing care.

3.14 The qualitative research with older people that the Housing LIN has conducted in Wales in the last 18 months (and elsewhere in the UK) indicates that:

- Housing for older people: there is interest in moving to existing and new housing for older people, for rent and for sale, if it is sufficiently attractive, e.g. to attract 'downsizing/rightsizing'.
- Housing with care: there is some interest in moving to existing and new housing with care, for rent and for sale, if it is sufficiently attractive. This tends to be of less interest compared to housing for older people options.
- Residential care: there is no or very limited interest in moving to a residential care home.
- Nursing care: there is only interest in moving to a nursing care home as a 'last resort' due to high/complex care needs.

3.15 Based on this available evidence the broad local authority commissioning trends identified are:

- An expected growth in commissioning and enabling of different types of housing for older people, e.g. development of contemporary 'care ready'<sup>23</sup> housing for social rent; this may include contemporary sheltered housing (which includes communal facilities and support services) and age-designated housing (which may not have any communal facilities or staff based support) and equivalent private sector retirement housing models.
- An expected growth in commissioning of extra care housing, predominantly for social rent but with some mixed tenure development.

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<sup>23</sup> 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.



- No additional growth in the use of residential care as there is no or limited interest amongst local authorities in expanding use of residential care and limited interest amongst older people in moving to a residential care home.
- An expected increase in the use of nursing care due to the increasing population of older people who are likely to have complex care needs, including dementia.
- A desire to prevent hospital admissions and entry into residential care through the use of housing-based step up/step down accommodation.

3.16 This contextual evidence and the Housing LIN's experience of working with 5 of the 22 local authorities in Wales and a much larger number of local authorities in England in relation to specialist accommodation for older people has been used as a basis for the following reasoned assumptions in relation to estimating demand for specialist housing and accommodation for older people, for each local authority to 2035.

1. Housing for older people:

- a) Where the prevalence rate for existing provision in a local authority area is below the current Welsh average prevalence rate, it is assumed that future demand will trend towards the Welsh average prevalence. Where the prevalence rate for existing provision in a local authority area is already at or above the current Welsh average prevalence rate, it is assumed that future demand will reflect current prevalence rates. However due to a lack of localised data, no assumptions can be made about the future suitability of existing provision and how this may affect future demand; therefore it has been assumed that estimated future prevalence will be no more than 10% above the existing all Wales average prevalence rate.
- b) The breakdown between estimated demand for units for social rent and for sale (including shared ownership) is based on the use of Welsh Index of Multiple Deprivation (WIMD) data (Annexe 3) and the Housing LIN's experience of working with local authorities and Registered Social Landlords in Wales; this approach is used in the absence of collecting primary data specifically for this assessment to provide evidence of demand for different tenures of housing designated for older people. It is assumed that in relation to estimated demand for units for rent and for sale (including shared ownership) applied to both housing for older people and housing with care:
  - i. Where over 15% of an authority's LSOAs are in the 10% most deprived nationally, there is assumed to be a 90%/10% breakdown between estimated demand for units for social rent and for sale (including shared ownership).
  - ii. Where between 5% and 15% of an authority's LSOAs are in the 10% most deprived nationally, there is assumed to be a 75%/25% breakdown between estimated demand for units for social rent and for sale (including shared ownership).

- iii. Where less than 5% of an authority's LSOAs are in the 10% most deprived nationally, there is assumed to be a 65%/35% breakdown between estimated demand for units for social rent and for sale (including shared ownership).
  - c) Based on assessments of future demand for specialist housing and accommodation for older people previously undertaken by the Housing LIN (in Wales and elsewhere in the UK<sup>24</sup>) it is assumed that, in relation to housing for older people for social rent, 50% of future demand is for age designated social housing and 50% is for contemporary sheltered housing.
- 2. Housing with Care:
  - a) Due to the strong local authority interest (Annexe 2) in developing additional extra care housing, estimates of demand for housing with care are based on the following assumptions<sup>25</sup>:
    - i. Where the prevalence rate for existing provision in a local authority area is at or below the current Welsh average prevalence rate, it is assumed that future demand will trend towards 15 units per 1000 population aged 75+.
    - ii. Where the prevalence rate for existing provision in a local authority area is already at or close to 15 units but below 20 units, it is assumed that future demand will trend towards 20 units per 1000 population aged 75+.
    - iii. Where the prevalence rate for existing provision in a local authority area is already at 20 units but below 25 units, it is assumed that future demand will trend towards 25 units per 1000 population aged 75+.
  - b) The breakdown between estimated demand for units for social rent and for sale (including shared ownership) is estimated as per 1b (above).
- 3. Residential care: There is an assumption of no net increase in beds by 2035, based on the strong interest expressed by local authorities to decrease residential care use and increase the use of alternatives (except where a different approach has already been identified by a local authority<sup>26</sup>).
- 4. Nursing care: Based on evidence from local authorities and the demographic projections of a significantly increasing 75+ population by 2035 (with associated increases in the prevalence of complex care needs), it is assumed that demand is

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<sup>24</sup> Based on evidence from housing need assessments for over 50 local authorities in England and Wales using the Housing LIN SHOP@ methodologies

<sup>25</sup> Drawn from experience of undertaking assessments of need for extra care housing for over 50 local authorities in England and Wales using the Housing LIN SHOP@ methodologies

<sup>26</sup> Housing LIN (2018). Assessment of Specialist Housing and Accommodation Need for Older People in West Wales for West Wales Care Partnership.

likely to increase. Where the prevalence rate for existing provision in a local authority area is below the current Welsh average prevalence rate, it is assumed that future demand will trend towards the Welsh average prevalence. Where the prevalence rate for existing provision in a local authority area is already at or above the current Welsh average prevalence rate, it is assumed that future demand will reflect current prevalence rates. NB due to a lack of data, no assumptions have been made about the future suitability of existing provision.

5. Step up/Step down accommodation: There is no national data about the current use of and likely future need for this type of accommodation. For the purposes of this assessment of future demand, based on the Housing LIN's experience of working with local authorities in relation to specialist accommodation for older people, it is assumed that approximately 3% of the estimated need for rented housing with care could be used for this purpose.

## Caveats and limitations

3.17 The following caveats and limitations apply to this desktop quantitative estimate of demand for specialist housing and accommodation for older people:

- This is a desktop exercise using secondary data to produce high level estimates of future demand for specialist housing and accommodation for older people.
- This assessment should be treated as a *guide* to future demand for specialist housing and accommodation for older people. Refining the assessment would require further research beyond the scope of this work, for example qualitative research with older people regarding their housing preferences; detailed discussion with local authorities and other stakeholders regarding localised factors that may affect future demand.
- Where local authorities have already produced their own estimates of future demand for specialist housing and accommodation for older people<sup>27,28</sup>, we have drawn on these where they are available within the timescales available to undertake this work. The methodologies used by the Housing LIN with these local authorities are broadly similar to the approach used here.
- Estimates in relation to the breakdown between demand for social rent and for sale units are based on use of the Welsh Index of Multiple Deprivation data, local authority evidence where this is available and our knowledge of 'real world' assumptions used by RSLs and other housing developers.
- Estimates in relation to 'step up/step down' housing are based on the Housing LIN's experience of these types of housing-based services and our interpretation of the available evidence.

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<sup>27</sup> Housing LIN (2018). Assessment of Older Person's Housing and Accommodation including with Care and Care Ready: For Cardiff & Vale of Glamorgan Regional Partnership Board.

<sup>28</sup> Housing LIN (2018). Assessment of Specialist Housing and Accommodation Need for Older People in West Wales for West Wales Care Partnership.

## 4. Estimated demand for specialist housing and accommodation for older people

4.01 The output from the approach set out in Section 3 is the identification of existing provision and quantitative estimates of the future demand for specialist housing and accommodation for older people from 2020/21 to 2035/36 for each local authority covering:

- Age designated social housing/sheltered housing for social rent.
- Private retirement housing for sale.
- Extra care housing, for social rent and for sale.
- Residential care provision.
- Nursing care provision.
- Step up/step down housing provision.

The source for the current supply of specialist accommodation throughout Section 4 is the Elderly Accommodation Counsel's 2018 supply figures.<sup>29</sup> The Elderly Accommodation Counsel maintains a directory of all specialist accommodation for older people in the UK. The database underlying the directory has been used here to determine the specialist housing stock in each local authority. The database is updated annually, so unit totals may not quite match those held internally by local authorities. However, the Elderly Accommodation Counsel database is the only comprehensive collated database of all specialist accommodation for older people across Wales and the rest of the UK.

4.02 This analysis identifies the estimated gap between the existing provision and the assessment of future demand for housing and accommodation for older people, i.e. the additional specialist housing and accommodation for older people that may be required to address identified demand to 2035. This is shown for:

- Each local authority, and
- Aggregated for Wales.

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<sup>29</sup> Elderly Accommodation Counsel (2018).

## Estimated future demand: Blaenau Gwent

4.03 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimate future demand for housing and accommodation for older people in Blaenau Gwent.

4.04 SHOP@ uses these assumptions to identify estimated future demand. Table 3 below shows the current provision of older people's housing and accommodation in Blaenau Gwent expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and 2035 estimated prevalence rates.

Table 3. SHOP@ prevalence: Blaenau Gwent

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	873	138	106	116
Housing with care	85	13	10	20
Residential care	137	22	38	15
Nursing care	267	42	36	42

4.05 Applying the estimated prevalence rates for older people's housing and accommodation (Table 3) in the SHOP@ model suggests the following future demand for Blaenau Gwent.

Table 4. Blaenau Gwent estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	873	1,019	1,036	1,061
Housing with Care	85	125	152	183
Residential Care	137	137	137	137
Nursing Care	267	329	354	384

4.06 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of housing and accommodation for older people (table 5) .

4.07 The suggested WIMD-based tenure breakdown assumptions (90%:10%) from Annexe 3 between units for social rent and units for sale are applied to the estimated demand for older people's housing and housing with care for Blaenau Gwent, shown in the following table.

Table 5. Blaenau Gwent estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	146	163	188
<i>For rent</i>	131	146	169
<i>For sale</i>	15	16	19
Housing with Care	40	67	98
<i>For rent</i>	36	60	88
<i>For sale</i>	4	7	10
Residential Care	0	0	0
Nursing Care	62	87	117

NB. Figures may not sum due to rounding. Demand estimates are not cumulative.

## Summary

4.08 In summary this indicates that the estimated net requirements for Blaenau Gwent to 2035 are:

- Housing for older people: 188 units of which 169 for rent and 19 for sale.
  - Of the 169 units for rent, approximately 50% (85) age designated social housing and approximately 50% (85) contemporary sheltered housing.
- Housing with care: 98 units of which 88 for rent and 10 for sale.
  - Approximately 3% of these housing with care units (3) are suggested for use as step up/step down units.
- Residential care: ±0 beds.
- Nursing care: 117 beds.

## Estimated future demand: Bridgend

4.09 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimate future demand for housing and accommodation for older people in Bridgend.

4.10 SHOP@ uses these assumptions to identify estimated future demand. Table 6 below shows the current provision of older people's housing and accommodation in Bridgend expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and 2035 estimated prevalence rates.

Table 6. SHOP@ prevalence: Bridgend

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	735	55	106	80
Housing with care	84	6	10	15
Residential care	559	42	38	27
Nursing care	392	29	36	32

4.11 Applying the estimated prevalence rates for older people's housing and accommodation (Table 3) in the SHOP@ model suggests the following future demand for Bridgend.

Table 7. Bridgend estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	735	1,069	1,356	1,682
Housing with Care	84	153	226	311
Residential Care	559	559	559	559
Nursing Care	392	509	584	664

4.12 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of housing and accommodation for older people.

4.13 The suggested WIMD-based tenure breakdown assumptions (75%:25%) from Annexe 3 between units for social rent and units for sale are applied to the estimated demand for older people's housing and housing with care for Bridgend, shown in the following table.

Table 8. Bridgend estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	334	621	947
<i>For rent</i>	250	466	710
<i>For sale</i>	83	155	237
Housing with Care	69	142	227
<i>For rent</i>	51	106	171
<i>For sale</i>	17	35	57
Residential Care	0	0	0
Nursing Care	117	192	272

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

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

- Housing for older people: 947 units of which 710 for rent and 237 for sale.
  - Of the 710 units for rent, approximately 50% (355) age designated social housing and approximately 50% (355) contemporary sheltered housing.
- Housing with care: 227 units of which 171 for rent and 57 for sale.
  - Approximately 3% of these housing with care units (5) are suggested for use as step up/step down units.
- Residential care: ±0 beds.
- Nursing care: 272 beds.



## Estimated future demand: Caerphilly

4.15 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimate future demand for housing and accommodation for older people in Caerphilly.

4.16 SHOP@ uses these assumptions to identify estimated future demand. Table 6 below shows the current provision of older people's housing and accommodation in Caerphilly expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and 2035 estimated prevalence rates.

Table 9. SHOP@ prevalence: Caerphilly

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	1,530	100	106	106
Housing with care	128	8	10	15
Residential care	433	28	38	18
Nursing care	436	29	36	32

4.17 Applying the estimated prevalence rates for older people's housing and accommodation (Table 3) in the SHOP@ model suggests the following future demand for Caerphilly.

Table 10. Caerphilly estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	1,530	1,994	2,209	2,418
Housing with Care	128	219	287	363
Residential Care	433	433	433	433
Nursing Care	436	598	685	774

4.18 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of housing and accommodation for older people.

4.19 The suggested WIMD-based tenure breakdown assumptions (75%:25%) from Annexe 3 between units for social rent and units for sale are applied to the estimated demand for older people's housing and housing with care for Caerphilly, shown in the following table.

Table 11. Caerphilly estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	464	679	888
<i>For rent</i>	348	510	666
<i>For sale</i>	116	170	222
Housing with Care	91	159	235
<i>For rent</i>	69	119	176
<i>For sale</i>	23	40	59
Residential Care	0	0	0
Nursing Care	162	249	338

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

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

- Housing for older people: 888 units of which 666 for rent and 222 for sale.
  - Of the 666 units for rent, approximately 50% (333) age designated social housing and approximately 50% (333) contemporary sheltered housing.
- Housing with care: 235 units of which 176 for rent and 59 for sale.
  - Approximately 3% of these housing with care units (5) are suggested for use as step up/step down units.
- Residential care: ±0 beds.
- Nursing care: 338 beds.

## Estimated future demand: Cardiff

4.21 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimating future demand for older people's housing and accommodation in Cardiff.

4.22 SHOP@ uses these assumptions to identify estimated future demand. Table 12 below shows the current older people's housing and accommodation in Cardiff expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and the 2035 estimated prevalence rates.

Table 12. SHOP@ prevalence: Cardiff.

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	2,869	122	106	120
Housing with care	267	11	10	23
Residential care	711	30	38	18
Nursing care	1,051	45	36	44

4.23 Applying the prevalence rates agreed with Cardiff by the Housing LIN in 2018<sup>30</sup> for older people's housing and accommodation (Table 12) in the SHOP@ model suggests the following future demand for Cardiff.

Table 13. Cardiff estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	2,869	3,554	4,055	4,656
Housing with Care	267	523	689	876
Residential Care	711	711	711	711
Nursing Care	1,051	1,302	1,485	1,706

4.24 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of housing and accommodation for older people.

<sup>30</sup> Housing LIN (2018). Assessment of Older Person's Housing and Accommodation including with Care and Care Ready: For Cardiff & Vale of Glamorgan Regional Partnership Board.

4.25 Approximate tenure breakdown assumptions (50%/50%) between units for social rent and units for sale are applied and shown in the following table (the original analysis was done at a sub-citywide level with a different rent/sale split for each area of the city<sup>31</sup>).

Table 14. Cardiff estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	685	1,186	1,787
<i>For rent</i>	343	593	894
<i>For sale</i>	343	593	894
Housing with Care	256	422	609
<i>For rent</i>	128	211	305
<i>For sale</i>	128	211	305
Residential Care	0	0	0
Nursing Care	252	435	656

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

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

- Housing for older people: 1,787 units of which 894 for rent and 894 for sale.
  - Of the 894 units for rent, approximately 50% (447) age designated social housing and approximately 50% (447) contemporary sheltered housing.
- Housing with care: 609 units of which 305 for rent and 305 for sale.
  - Approximately 3% of these rented housing with care units (9) for step up/step down units.
- Residential care: ±0 beds.
- Nursing care: 656 beds.

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<sup>31</sup> Housing LIN (2018). Assessment of Older Person's Housing and Accommodation including with Care and Care Ready: For Cardiff & Vale of Glamorgan Regional Partnership Board.

## Estimated future demand: Carmarthenshire

4.27 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimate future demand for older people's housing and accommodation in Carmarthenshire.

4.28 SHOP@ uses these assumptions to identify estimated future demand. Table 15 below shows the current older people's housing and accommodation in Carmarthenshire expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and the 2035 estimated prevalence rates.

Table 15. SHOP@ prevalence: Carmarthenshire.

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	3,128	174	106	119
Housing with care	189	10	10	15
Residential care	1,044	50	38	35
Nursing care	505	30	36	38

4.29 These prevalence rates were agreed with Carmarthenshire by the Housing LIN in 2018<sup>32</sup>. Housing for older people and residential care are estimated to decrease to avoid future oversupply. Applying the suggested prevalence rates for older people's housing and accommodation (Table 15) in the SHOP@ model suggests the following future demand for Carmarthenshire.

Table 16. Carmarthenshire estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	3,128	3,831	3,865	3,768
Housing with Care	189	315	378	475
Residential Care	1,044	1,102	1,098	1,108
Nursing Care	505	892	1,046	1,203

4.30 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of housing and accommodation for older people.

<sup>32</sup> Housing LIN (2018). Assessment of Specialist Housing and Accommodation Demand for Older People in West Wales for West Wales Care Partnership.

4.31 The WIMD-based tenure breakdown assumptions agreed with the council<sup>33</sup> between units for social rent and units for sale are applied to the estimated demand for older people's housing and accommodation for Carmarthenshire, shown in the following table.

Table 17. Carmarthenshire estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	703	737	640
<i>For rent</i>	162	190	109
<i>For sale</i>	542	546	532
Housing with Care	126	189	286
<i>For rent</i>	77	131	212
<i>For sale</i>	49	58	73
Residential Care	58	54	64
Nursing Care	387	541	698

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

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

- Housing for older people: 640 units of which 109 for rent and 532 for sale.
  - Of the 109 units for rent, approximately 50% (55) age designated social housing and approximately 50% (55) contemporary sheltered housing.
- Housing with care: 286 units of which 212 for rent and 73 for sale.
  - Approximately 3% of these rented Housing with Care units (6) are suggested for use as step up/step down units.
- Residential care: 64 beds.
- Nursing care: 698 beds.

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<sup>33</sup> *ibid.*

## Estimated future demand: Ceredigion

4.33 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimating future demand for older people's housing and accommodation in Ceredigion.

4.34 SHOP@ uses these assumptions to identify estimated future demand. Table 18 below shows the current older people's housing and accommodation in Ceredigion expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and the 2035 assumed prevalence rates.

Table 18. SHOP@ prevalence: Ceredigion.

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 Estimated prevalence rate</b>
Housing for older people	474	70	106	80
Housing with care	48	10	10	15
Residential care	316	35	38	30
Nursing care	271	37	36	40

4.35 These prevalence rates were agreed with Ceredigion by the Housing LIN in 2018<sup>34</sup>. Applying the suggested prevalence rates for older people's housing and accommodation (Table 18) in the SHOP@ model projects the following future demand for Ceredigion.

Table 19. Ceredigion estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	474	816	924	1,018
Housing with Care	48	131	155	191
Residential Care	316	359	370	382
Nursing Care	271	424	477	522

4.36 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of older people's housing and accommodation.

<sup>34</sup> Housing LIN (2018). Assessment of Specialist Housing and Accommodation Demand for Older People in West Wales for West Wales Care Partnership.

4.37 The WIMD-based tenure breakdown assumptions agreed with the council<sup>35</sup> between units for social rent and units for sale are applied to the estimated demand for older people's housing and accommodation for Ceredigion, shown in the following table.

Table 20. Ceredigion estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	342	450	544
<i>For rent</i>	214	280	336
<i>For sale</i>	129	172	209
Housing with Care	83	107	143
<i>For rent</i>	46	60	81
<i>For sale</i>	38	48	62
Residential Care	43	54	66
Nursing Care	153	206	251

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

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

- Housing for older people: 544 units of which 336 for rent and 209 for sale.
  - Of the 336 units for rent, approximately 50% (168) age designated social housing and approximately 50% (168) contemporary sheltered housing.
- Housing with care: 143 units of which 81 for rent and 62 for sale.
  - Approximately 3% of these rented housing with care units (2) are suggested for use as step up/step down units.
- Residential care: 66 beds.
- Nursing care: 251 beds.

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<sup>35</sup> *ibid.*



## Estimated future demand: Conwy

4.39 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimate future demand for housing and accommodation for older people in Conwy.

4.40 SHOP@ uses these assumptions to identify estimated future demand. Table 21 below shows the current provision of older people's housing and accommodation in Conwy expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and 2035 estimated prevalence rates.

Table 21. SHOP@ prevalence: Conwy

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	2,381	152	106	116
Housing with care	363	23	10	25
Residential care	713	46	38	31
Nursing care	635	41	36	41

4.41 Applying the estimated prevalence rates for older people's housing and accommodation (Table 21) in the SHOP@ model suggests the following future demand for Conwy.

Table 22. Conwy estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	2,381	2,590	2,609	2,647
Housing with Care	363	460	501	570
Residential Care	713	713	713	713
Nursing Care	635	787	856	936

4.42 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of housing and accommodation for older people.

4.43 The suggested WIMD-based tenure breakdown assumptions (75%:25%) from Annexe 3 between units for social rent and units for sale are applied to the estimated demand for older people's housing and housing with care for Conwy, shown in the following table.

Table 23. Conwy estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	209	228	266
<i>For rent</i>	157	171	199
<i>For sale</i>	52	57	66
Housing with Care	97	138	207
<i>For rent</i>	73	103	156
<i>For sale</i>	24	34	52
Residential Care	0	0	0
Nursing Care	152	221	301

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

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

- Housing for older people: 266 units of which 199 for rent and 66 for sale.
  - Of the 199 units for rent, approximately 50% (100) age designated social housing and approximately 50% (100) contemporary sheltered housing.
- Housing with care: 207 units of which 156 for rent and 52 for sale.
  - Approximately 3% of these housing with care units (5) are suggested for use as step up/step down units.
- Residential care: ±0 beds.
- Nursing care: 301 beds.

## Estimated future demand: Denbighshire

4.45 Assumptions based on section 3.16 2 and local evidence (Appendix 2) are applied to estimating future demand for older people's housing and accommodation in Denbighshire.

4.46 SHOP@ uses these assumptions to identify estimated future demand. Table 24 below shows the current older people's housing and accommodation in Denbighshire expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and the 2035 estimated prevalence rates.

Table 24. SHOP@ prevalence: Denbighshire.

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	1,144	111	106	111
Housing with care	139	13	10	20
Residential care	792	77	38	51
Nursing care	294	29	36	32

4.47 Applying the suggested prevalence rates for older people's housing and accommodation (Table 24) in the SHOP@ model suggests the following future demand for Denbighshire.

Table 25. Denbighshire estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	1,144	1,466	1,605	1,733
Housing with Care	139	211	260	312
Residential Care	792	792	792	792
Nursing Care	294	396	448	499

4.48 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of older people's housing and accommodation.

4.49 The suggested WIMD-based tenure breakdown assumptions (75%:25%) from Annexe 3 between units for social rent and units for sale are applied to the estimated demand for older people's housing and accommodation for Denbighshire, shown in the following table.

Table 26. Denbighshire estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	322	461	589
<i>For rent</i>	242	346	441
<i>For sale</i>	81	115	147
Housing with Care	72	121	173
<i>For rent</i>	54	91	130
<i>For sale</i>	18	30	43
Residential Care	0	0	0
Nursing Care	102	154	205

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

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

- Housing for older people: 589 units of which 441 for rent and 147 for sale.
  - Of the 441 units for rent, approximately 50% (221) age designated social housing and approximately 50% (221) contemporary sheltered housing.
- Housing with care: 173 units of which 130 for rent and 43 for sale.
  - Approximately 3% of these rented housing with care units (4) are suggested for use as step up/step down units.
- Residential care: ±0 beds.
- Nursing care: 205 beds.

## Estimated future demand: Flintshire

4.51 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimating future demand for older people's housing and accommodation in Flintshire.

4.52 SHOP@ uses these assumptions to identify estimated future demand. Table 27 below shows the current older people's housing and accommodation in Flintshire expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and the 2035 estimated prevalence rates.

Table 27. SHOP@ prevalence: Flintshire.

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	2,458	170	106	116
Housing with care	186	13	10	20
Residential care	533	37	38	22
Nursing care	304	21	36	24

4.53 Applying the estimated prevalence rates for older people's housing and accommodation (Table 27) in the SHOP@ model projects the following future demand for Flintshire.

Table 28. Flintshire estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	2,458	2,653	2,738	2,759
Housing with Care	186	314	394	476
Residential Care	533	533	533	533
Nursing Care	304	432	504	571

4.54 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of older people's housing and accommodation.

4.55 The suggested WIMD-based tenure breakdown assumptions (65%:35%) from Annexe 3 between units for social rent and units for sale are applied to the estimated demand for older people's housing and accommodation for Flintshire, shown in the following table.

Table 29. Flintshire estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	195	280	301
<i>For rent</i>	127	182	196
<i>For sale</i>	68	98	105
Housing with Care	128	208	290
<i>For rent</i>	83	135	188
<i>For sale</i>	45	73	101
Residential Care	0	0	0
Nursing Care	128	200	267

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

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

- Housing for older people: 301 units of which 196 for rent and 105 for sale.
  - Of the 196 units for rent, approximately 50% (98) age designated social housing and approximately 50% (98) contemporary sheltered housing.
- Housing with care: 290 units of which 188 for rent and 101 for sale.
  - Approximately 3% of these rented housing with care units (6) are suggested for use as step up/step down units.
- Residential care: ±0 beds.
- Nursing care: 267 beds.

## Estimated future demand: Gwynedd

4.57 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimating future demand for older people's housing and accommodation in Gwynedd.

4.58 SHOP@ uses these assumptions to identify estimated future demand. Table 30 below shows the current older people's housing and accommodation in Gwynedd expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and the 2035 estimated prevalence rates.

Table 30. SHOP@ prevalence: Gwynedd.

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	958	70	106	80
Housing with care	233	17	10	20
Residential care	570	42	38	29
Nursing care	612	45	36	45

4.59 Applying the estimated prevalence rates for older people's housing and accommodation (Table 30) in the SHOP@ model projects the following future demand for Gwynedd.

Table 31. Gwynedd estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	958	1,269	1,438	1,598
Housing with Care	233	309	350	395
Residential Care	570	570	570	570
Nursing Care	612	772	830	888

4.60 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of older people's housing and accommodation.

4.61 The suggested WIMD-based tenure breakdown assumptions (65%:35%) from Annexe 3 between units for social rent and units for sale are applied to the estimated demand for older people's housing and accommodation for Gwynedd, shown in the following table.

Table 32. Gwynedd estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	311	480	640
<i>For rent</i>	202	312	416
<i>For sale</i>	109	168	224
Housing with Care	76	117	162
<i>For rent</i>	49	76	105
<i>For sale</i>	27	41	57
Residential Care	0	0	0
Nursing Care	160	218	276

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

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

- Housing for older people: 640 units of which 416 for rent and 224 for sale.
  - Of the 416 units for rent, approximately 50% (208) age designated social housing and approximately 50% (320) contemporary sheltered housing.
- Housing with care: 162 units of which 105 for rent and 57 for sale.
  - Approximately 3% of these rented housing with care units (3) are suggested for use as step up/step down units.
- Residential care: ±0 beds.
- Nursing care: 276 beds.



## Estimated future demand: Isle of Anglesey

4.63 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimating future demand for older people's housing and accommodation for the Isle of Anglesey.

4.64 SHOP@ uses these assumptions to identify estimated future demand. Table 33 below shows the current older people's housing and accommodation on the Isle of Anglesey expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and the 2035 estimated prevalence rates.

Table 33. SHOP@ prevalence: Isle of Anglesey.

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	755	93	106	94
Housing with care	117	14	10	20
Residential care	441	54	38	36
Nursing care	177	22	36	25

4.65 Applying the estimated prevalence rates for older people's housing and accommodation (Table 33) in the SHOP@ model projects the following future demand for the Isle of Anglesey.

Table 34. Isle of Anglesey estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	755	966	1,061	1,146
Housing with Care	117	166	203	244
Residential Care	441	441	441	441
Nursing Care	177	239	271	305

4.66 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of older people's housing and accommodation.

4.67 The suggested WIMD-based tenure breakdown assumptions (65%:35%) from Annexe 3 between units for social rent and units for sale are applied to the estimated demand for older people's housing and accommodation for the Isle of Anglesey, shown in the following table.

Table 35. Isle of Anglesey estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	211	306	391
<i>For rent</i>	137	199	254
<i>For sale</i>	74	107	137
Housing with Care	49	86	127
<i>For rent</i>	32	56	82
<i>For sale</i>	17	30	44
Residential Care	0	0	0
Nursing Care	62	94	128

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

4.68 In summary this indicates that the estimated net requirements for the Isle of Anglesey to 2035 are:

- Housing for older people: 391 units of which 254 for rent and 137 for sale.
  - Of the 254 units for rent, approximately 50% (127) age designated social housing and approximately 50% (127) contemporary sheltered housing.
- Housing with care: 127 units of which 82 for rent and 44 for sale.
  - Approximately 3% of these rented housing with care units (2) are suggested for use as step up/step down units.
- Residential care: ±0 beds.
- Nursing care: 128 beds.

## Estimated future demand: Merthyr Tydfil

4.69 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimating future demand for older people’s housing and accommodation in Merthyr Tydfil.

4.70 SHOP@ uses these assumptions to identify estimated future demand. Table 36 below shows the current older people’s housing and accommodation in Merthyr Tydfil expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and the 2035 estimated prevalence rates.

Table 36. SHOP@ prevalence: Merthyr Tydfil.

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	429	87	106	90
Housing with care	60	12	10	20
Residential care	198	40	38	26
Nursing care	140	28	36	31

4.71 Applying the estimated prevalence rates for older people’s housing and accommodation (Table 36) in the SHOP@ model projects the following future demand for Merthyr Tydfil.

Table 37. Merthyr Tydfil estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	429	543	614	696
Housing with Care	60	93	124	155
Residential Care	198	198	198	198
Nursing Care	140	179	207	240

4.72 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of older people’s housing and accommodation.

4.73 The suggested WIMD-based tenure breakdown assumptions (90%:10%) from Annexe 3 between units for social rent and units for sale are applied to the estimated demand for older people’s housing and accommodation for Merthyr Tydfil, shown in the following table.

Table 38. Merthyr Tydfil estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	114	185	267
<i>For rent</i>	103	166	240
<i>For sale</i>	11	18	27
Housing with Care	33	64	95
<i>For rent</i>	29	58	85
<i>For sale</i>	3	6	9
Residential Care	0	0	0
Nursing Care	39	67	100

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

4.74 In summary this indicates that the estimated net requirements for Merthyr Tydfil to 2035 are:

- Housing for older people: 267 units of which 240 for rent and 27 for sale.
  - Of the 240 units for rent, approximately 50% (120) age designated social housing and approximately 50% (120) contemporary sheltered housing.
- Housing with care: 95 units of which 85 for rent and 9 for sale.
  - Approximately 3% of these rented housing with care units (3) are suggested for use as step up/step down units.
- Residential care: ±0 beds.
- Nursing care: 100 beds.

## Estimated future demand: Monmouthshire

4.75 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimating future demand for older people’s housing and accommodation in Monmouthshire.

4.76 SHOP@ uses these assumptions to identify estimated future demand. Table 39 below shows the current older people’s housing and accommodation in Monmouthshire expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and the 2035 estimated prevalence rates.

Table 39. SHOP@ prevalence: Monmouthshire.

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	1,134	104	106	106
Housing with care	57	5	10	10
Residential care	214	20	38	12
Nursing care	351	32	36	36

4.77 Applying the estimated prevalence rates for older people’s housing and accommodation (Table 39) in the SHOP@ model projects the following future demand for Monmouthshire.

Table 40. Monmouthshire estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	1,134	1,499	1,722	1,920
Housing with Care	57	101	131	181
Residential Care	214	214	214	214
Nursing Care	351	490	574	652

4.78 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of older people’s housing and accommodation.

4.79 The suggested WIMD-based tenure breakdown assumptions (65%:35%) from Annexe 3 between units for social rent and units for sale are applied to the estimated demand for older people’s housing and accommodation for Monmouthshire, shown in the following table.

Table 41. Monmouthshire estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	365	588	786
<i>For rent</i>	237	382	511
<i>For sale</i>	128	206	275
Housing with Care	44	74	124
<i>For rent</i>	29	48	81
<i>For sale</i>	15	26	43
Residential Care	0	0	0
Nursing Care	139	223	301

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

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

- Housing for older people: 786 units of which 511 for rent and 275 for sale.
  - Of the 511 units for rent, approximately 50% (255) age designated social housing and approximately 50% (255) contemporary sheltered housing.
- Housing with care: 124 units of which 81 for rent and 43 for sale.
  - Approximately 3% of these rented housing with care units (2) are suggested for use as step up/step down units.
- Residential care: ±0 beds.
- Nursing care: 301 beds.

## Estimated future demand: Neath Port Talbot

4.81 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimating future demand for older people's housing and accommodation in Neath Port Talbot.

4.82 SHOP@ uses these assumptions to identify estimated future demand. Table 42 below shows the current older people's housing and accommodation in Neath Port Talbot expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and the 2035 estimated prevalence rates.

Table 42. SHOP@ prevalence: Neath Port Talbot.

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	945	70	106	80
Housing with care	115	9	10	15
Residential care	374	28	38	18
Nursing care	632	47	36	47

4.83 Applying the estimated prevalence rates for older people's housing and accommodation (Table 42) in the SHOP@ model projects the following future demand for Neath Port Talbot.

Table 43. Neath Port Talbot estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	945	1,255	1,484	1,710
Housing with Care	115	187	247	317
Residential Care	374	374	374	374
Nursing Care	632	797	894	992

4.84 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of older people's housing and accommodation.

4.85 The suggested WIMD-based tenure breakdown assumptions (75%:25%) from Annexe 3 between units for social rent and units for sale are applied to the estimated demand for older people's housing and accommodation for Neath Port Talbot, shown in the following table.

Table 44. Neath Port Talbot estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	310	539	765
<i>For rent</i>	232	404	574
<i>For sale</i>	77	135	191
Housing with Care	72	132	202
<i>For rent</i>	54	99	151
<i>For sale</i>	18	33	50
Residential Care	0	0	0
Nursing Care	165	262	360

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

4.86 In summary this indicates that the estimated net requirements for Neath Port Talbot to 2035 are:

- Housing for older people: 765 units of which 574 for rent and 191 for sale.
  - Of the 574 units for rent, approximately 50% (287) age designated social housing and approximately 50% (287) contemporary sheltered housing.
- Housing with care: 202 units of which 151 for rent and 50 for sale.
  - Approximately 3% of these rented housing with care units (5) are suggested for use as step up/step down units.
- Residential care: ±0 beds.
- Nursing care: 360 beds.



## Estimated future demand: Newport

4.87 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimating future demand for older people's housing and accommodation in Newport.

4.88 SHOP@ uses these assumptions to identify estimated future demand. Table 45 below shows the current older people's housing and accommodation in Newport expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and the 2035 estimated prevalence rates.

Table 45. SHOP@ prevalence: Newport.

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	1,122	91	106	100
Housing with care	161	13	10	20
Residential care	456	37	38	25
Nursing care	465	38	36	38

4.89 Applying the estimated prevalence rates for older people's housing and accommodation (Table 45) in the SHOP@ model projects the following future demand for Newport.

Table 46. Newport estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	1,122	1,441	1,593	1,827
Housing with Care	161	243	296	365
Residential Care	456	456	456	456
Nursing Care	465	576	624	694

4.90 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of older people's housing and accommodation.

4.91 The suggested WIMD-based tenure breakdown assumptions (75%:25%) from Annexe 3 between units for social rent and units for sale are applied to the estimated demand for older people's housing and accommodation for Newport, shown in the following table.

Table 47. Newport estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	319	471	705
<i>For rent</i>	239	353	528
<i>For sale</i>	80	118	176
Housing with Care	82	135	204
<i>For rent</i>	61	101	153
<i>For sale</i>	20	34	51
Residential Care	0	0	0
Nursing Care	111	159	229

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

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

- Housing for older people: 705 units of which 528 for rent and 176 for sale.
  - Of the 528 units for rent, approximately 50% (264) age designated social housing and approximately 50% (264) contemporary sheltered housing.
- Housing with care: 204 units of which 153 for rent and 51 for sale.
  - Approximately 3% of these rented Housing with Care units (5) are suggested for use as step up/step down units.
- Residential care: ±0 beds.
- Nursing care: 229 beds.

## Estimated future demand: Pembrokeshire

4.93 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimating future demand for older people's housing and accommodation in Pembrokeshire.

4.94 SHOP@ uses these assumptions to identify estimated future demand. Table 48 below shows the current older people's housing and accommodation in Pembrokeshire expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and the 2035 estimated prevalence rates.

Table 48. SHOP@ prevalence: Pembrokeshire.

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	1,119	90	106	100
Housing with care	128	10	10	15
Residential care	479	35	38	30
Nursing care	483	39	36	41

4.95 These prevalence rates were agreed with Pembrokeshire by the Housing LIN in 2018<sup>36</sup>. Applying the suggested prevalence rates for older people's housing and accommodation (Table 48) in the SHOP@ model projects the following future demand for Pembrokeshire.

Table 49. Pembrokeshire estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	1,119	1,804	2,045	2,259
Housing with Care	128	228	273	339
Residential Care	479	627	650	678
Nursing Care	483	741	839	926

4.96 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of older people's housing and accommodation.

<sup>36</sup> Housing LIN (2018). Assessment of Specialist Housing and Accommodation Demand for Older People in West Wales for West Wales Care Partnership.

4.97 The WIMD-based tenure breakdown assumptions agreed with the council<sup>37</sup> between units for social rent and units for sale are applied to the estimated demand for older people's housing and accommodation for Pembrokeshire, shown in the following table.

Table 50. Pembrokeshire estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	685	926	1,140
<i>For rent</i>	399	546	677
<i>For sale</i>	287	380	463
Housing with Care	100	145	211
<i>For rent</i>	55	81	122
<i>For sale</i>	47	63	90
Residential Care	148	171	199
Nursing Care	258	356	443

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

4.98 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.
  - Of the 677 units for rent, approximately 50% (339) age designated social housing and approximately 50% (339) contemporary sheltered housing.
- Housing with care: 211 units of which 122 for rent and 90 for sale.
  - Approximately 3% of these rented housing with care units (4) are suggested for use as step up/step down units.
- Residential care: 199 beds.
- Nursing care: 443 beds.

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<sup>37</sup> *ibid.*

## Estimated future demand: Powys

4.99 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimating future demand for older people’s housing and accommodation in Powys.

4.100 SHOP@ uses these assumptions to identify estimated future demand. Table 51 below shows the current older people’s housing and accommodation in Powys expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and the 2035 estimated prevalence rates.

Table 51. SHOP@ prevalence: Powys.

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 Estimated prevalence rate</b>
Housing for older people	2,165	128	106	116
Housing with care	58	3	10	8
Residential care	550	33	38	21
Nursing care	509	30	36	36

4.101 Applying the estimated prevalence rates for older people’s housing and accommodation (Table 51) in the SHOP@ model projects the following future demand for Powys.

Table 52. Powys estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	2,165	2,766	2,925	3,058
Housing with Care	58	110	171	264
Residential Care	550	550	550	550
Nursing Care	509	702	829	949

4.102 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of older people’s housing and accommodation.

4.103 The suggested WIMD-based tenure breakdown assumptions (65%:35%) from Annexe 3 between units for social rent and units for sale are applied to the estimated demand for older people’s housing and accommodation for Powys, shown in the following table.

Table 53. Powys estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	601	760	893
<i>For rent</i>	391	494	581
<i>For sale</i>	210	266	313
Housing with Care	52	113	206
<i>For rent</i>	34	73	134
<i>For sale</i>	18	39	72
Residential Care	0	0	0
Nursing Care	193	320	440

NB. Figures may not sum due to rounding. Demand estimated not cumulative.

## Summary

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

- Housing for older people: 893 units of which 581 for rent and 313 for sale.
  - Of the 581 units for rent, approximately 50% (291) age designated social housing and approximately 50% (291) contemporary sheltered housing.
- Housing with care: 206 units of which 134 for rent and 72 for sale.
  - Approximately 3% of these rented housing with care units (4) are suggested for use as step up/step down units.
- Residential care: ±0 beds.
- Nursing care: 440 beds.

## Estimated future demand: Rhondda Cynon Taf

4.105 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimating future demand for older people’s housing and accommodation in Rhondda Cynon Taf.

4.106 SHOP@ uses these assumptions to identify estimated future demand. Table 54 below shows the current older people’s housing and accommodation in Rhondda Cynon Taf expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and the 2035 estimated prevalence rates.

Table 54. SHOP@ prevalence: Rhondda Cynon Taf.

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	1,547	77	106	81
Housing with care	60	3	10	10
Residential care	725	36	38	24
Nursing care	816	41	36	41

4.107 Applying the estimated prevalence rates for older people’s housing and accommodation (Table 54) in the SHOP@ model projects the following future demand for Rhondda Cynon Taf.

Table 55. Rhondda Cynon Taf estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	1,547	2,008	2,202	2,413
Housing with Care	60	127	193	298
Residential Care	725	725	725	725
Nursing Care	816	1,042	1,128	1,222

4.108 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of older people’s housing and accommodation.

4.109 The suggested WIMD-based tenure breakdown assumptions (90%:10%) from Annexe 3 between units for social rent and units for sale are applied to the estimated demand for older people’s housing and accommodation for Rhondda Cynon Taf, shown in the following table.

Table 56. Rhondda Cynon Taf estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	461	655	866
<i>For rent</i>	414	589	780
<i>For sale</i>	46	65	87
Housing with Care	67	133	238
<i>For rent</i>	60	119	214
<i>For sale</i>	7	13	24
Residential Care	0	0	0
Nursing Care	226	312	406

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

4.110 In summary this indicates that the estimated net requirements for Rhondda Cynon Taf to 2035 are:

- Housing for older people: 866 units of which 780 for rent and 87 for sale.
  - Of the 780 units for rent, approximately 50% (390) age designated social housing and approximately 50% (390) contemporary sheltered housing.
- Housing with care: 238 units of which 214 for rent and 24 for sale.
  - Approximately 3% of these rented housing with care units (6) are suggested for use as step up/step down units.
- Residential care: ±0 beds.
- Nursing care: 406 beds.



## Estimated future demand: Swansea

4.111 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimating future demand for older people’s housing and accommodation in Swansea.

4.112 SHOP@ uses these assumptions to identify estimated future demand. Table 57 below shows the current older people’s housing and accommodation in Swansea expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and the 2035 estimated prevalence rates.

Table 57. SHOP@ prevalence: Swansea.

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	2,921	126	106	116
Housing with care	222	10	10	20
Residential care	695	30	38	20
Nursing care	1,127	49	36	49

4.113 Applying the estimated prevalence rates for older people’s housing and accommodation (Table 57) in the SHOP@ model projects the following future demand for Swansea.

Table 58. Swansea estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	2,921	3,501	3,740	3,955
Housing with Care	222	398	530	682
Residential Care	695	695	695	695
Nursing Care	1,127	1,395	1,527	1,671

4.114 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of older people’s housing and accommodation.

4.115 The suggested WIMD-based tenure breakdown assumptions (75%:25%) from Annexe 3 between units for social rent and units for sale are applied to the estimated demand for older people’s housing and accommodation for Swansea, shown in the following table.

Table 59. Swansea estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	580	819	1034
<i>For rent</i>	435	614	775
<i>For sale</i>	145	205	258
Housing with Care	176	308	460
<i>For rent</i>	132	231	345
<i>For sale</i>	44	77	115
Residential Care	0	0	0
Nursing Care	268	400	544

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

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

- Housing for older people: 1,034 units of which 775 for rent and 258 for sale.
  - Of the 775 units for rent, approximately 50% (388) age designated social housing and approximately 50% (388) contemporary sheltered housing.
- Housing with care: 460 units of which 345 for rent and 115 for sale.
  - Approximately 3% of these rented housing with care units (10) are suggested for use as step up/step down units.
- Residential care: ±0 beds.
- Nursing care: 544 beds.

## Estimated future demand: Torfaen

4.117 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimating future demand for older people’s housing and accommodation in Torfaen.

4.118 SHOP@ uses these assumptions to identify estimated future demand. Table 60 below shows the current older people’s housing and accommodation in Torfaen expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and the 2035 estimated prevalence rates.

Table 60. SHOP@ prevalence: Torfaen.

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	1,178	136	106	116
Housing with care	35	4	10	15
Residential care	332	38	38	25
Nursing care	316	36	36	36

4.119 Applying the estimated prevalence rates for older people’s housing and accommodation (Table 60) in the SHOP@ model projects the following future demand for Torfaen.

Table 61. Torfaen estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	1,178	1,432	1,509	1,562
Housing with Care	35	88	147	202
Residential Care	332	332	332	332
Nursing Care	316	397	442	485

4.120 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of older people’s housing and accommodation.

4.121 The suggested WIMD-based tenure breakdown assumptions (75%:25%) from Annexe 3 between units for social rent and units for sale are applied to the estimated demand for older people’s housing and accommodation for Torfaen, shown in the following table.

Table 62. Torfaen estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	254	331	384
<i>For rent</i>	191	249	288
<i>For sale</i>	64	83	96
Housing with Care	53	112	167
<i>For rent</i>	40	84	125
<i>For sale</i>	13	28	42
Residential Care	0	0	0
Nursing Care	81	126	169

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

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

- Housing for older people: 384 units of which 288 for rent and 96 for sale.
  - Of the 288 units for rent, approximately 50% (144) age designated social housing and approximately 50% (144) contemporary sheltered housing.
- Housing with care: 167 units of which 125 for rent and 42 for sale.
  - Approximately 3% of these rented housing with care units (4) are suggested for use as step up/step down units.
- Residential care: ±0 beds.
- Nursing care: 169 beds.

## Estimated future demand: Vale of Glamorgan

4.123 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimating future demand for older people's housing and accommodation in Vale of Glamorgan.

4.124 SHOP@ uses these assumptions to identify estimated future demand. Table 63 below shows the current older people's housing and accommodation in Vale of Glamorgan expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and the 2035 assumed prevalence rates.

Table 63. SHOP@ prevalence: Vale of Glamorgan.

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	829	71	106	70
Housing with care	42	4	10	20
Residential care	464	40	38	23
Nursing care	462	39	36	39

4.125 Applying the prevalence rates agreed with Vale of Glamorgan by the Housing LIN in 2018<sup>38</sup> for older people's housing and accommodation (Table 63) in the SHOP@ model estimates the following future demand for Vale of Glamorgan.

Table 64. Vale of Glamorgan estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	829	1,115	1,266	1,415
Housing with Care	42	202	302	400
Residential Care	464	464	464	464
Nursing Care	462	622	706	788

4.126 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of older people's housing and accommodation.

4.127 Approximate tenure breakdown assumptions (43%:57%) between units for social rent and units for sale are applied and shown in the following table (the original analysis was

<sup>38</sup> Housing LIN (2018). Assessment of Older Person's Housing and Accommodation including with Care and Care Ready: For Cardiff & Vale of Glamorgan Regional Partnership Board.

done at a sub-authority level with a different rent/sale split for each area of the local authority<sup>39</sup>).

Table 65. Vale of Glamorgan estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	286	437	586
<i>For rent</i>	123	188	252
<i>For sale</i>	163	249	334
Housing with Care	160	260	358
<i>For rent</i>	69	112	154
<i>For sale</i>	91	148	204
Residential Care	0	0	0
Nursing Care	160	244	326

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

4.128 In summary this indicates that the estimated net requirements for Vale of Glamorgan to 2035 are:

- Housing for older people: 586 units of which 252 for rent and 334 for sale.
  - Of the 252 units for rent, approximately 50% (126) age designated social housing and approximately 50% (126) contemporary sheltered housing.
- Housing with care: 358 units of which 154 for rent and 204 for sale.
  - Approximately 3% of these rented housing with care units (5) are suggested for use as step up/step down units.
- Residential care: ±0 beds.
- Nursing care: 326 beds.

<sup>39</sup> Housing LIN (2018). Assessment of Older Person's Housing and Accommodation including with Care and Care Ready: For Cardiff & Vale of Glamorgan Regional Partnership Board.

## Estimated future demand: Wrexham

4.129 Assumptions based on section 3.16 and local evidence (Appendix 2) are applied to estimating future demand for older people’s housing and accommodation in Wrexham.

4.130 SHOP@ uses these assumptions to identify estimated future demand. Table 66 below shows the current older people’s housing and accommodation in Wrexham expressed as a prevalence per 1,000 people aged 75+, the Welsh equivalent prevalence and the 2035 estimated prevalence rates.

Table 66. SHOP@ prevalence: Wrexham.

	<b>Current units/beds</b>	<b>Current prevalence rate</b>	<b>Welsh prevalence rate</b>	<b>2035 estimated prevalence rate</b>
Housing for older people	916	75	106	81
Housing with care	114	9	10	20
Residential care	689	57	38	35
Nursing care	518	42	36	42

4.131 Applying the estimated prevalence rates for older people’s housing and accommodation (Table 66) in the SHOP@ model projects the following future demand for Wrexham.

Table 67. Wrexham estimated future demand (units/beds) to 2035.

	<b>Current provision (units/beds)</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Housing for Older People	916	1,227	1,407	1,574
Housing with Care	114	207	303	389
Residential Care	689	689	689	689
Nursing Care	518	669	748	816

4.132 Current provision is subtracted from estimated future demand to identify the estimated shortfall for different types of older people’s housing and accommodation.

4.133 The suggested WIMD-based tenure breakdown assumptions (75%:25%) from Annexe 3 between units for social rent and units for sale are applied to the estimated demand for older people’s housing and accommodation for Wrexham, shown in the following table.

Table 68. Wrexham estimated net demand (shortfall in units/beds) to 2035.

	2025	2030	2035
Housing for Older People	311	491	658
<i>For rent</i>	233	368	494
<i>For sale</i>	78	123	165
Housing with Care	93	189	275
<i>For rent</i>	70	142	206
<i>For sale</i>	23	47	69
Residential Care	0	0	0
Nursing Care	151	230	298

NB. Figures may not sum due to rounding. Demand estimates not cumulative.

## Summary

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

- Housing for older people: 658 units of which 494 for rent and 165 for sale.
  - Of the 494 units for rent, approximately 50% (247) age designated social housing and approximately 50% (247) contemporary sheltered housing.
- Housing with care: 275 units of which 206 for rent and 69 for sale.
  - Approximately 3% of these rented housing with care units (6) are suggested for use as step up/step down units.
- Residential care: ±0 beds.
- Nursing care: 298 beds.



## 5. Summary: Demand for specialist housing and accommodation for older people in Wales

5.01 Tables 69a, 69b and 69c show the estimated shortfall, i.e. the estimated 'gap' between future demand and current supply, for specialist housing and accommodation for older people, by type and tenure, for each local authority and across Wales in total by 2025, 2030 and 2035.

5.02 This estimates that across Wales there is likely to be a shortfall by 2035 of:

- Approximately 15,000 units of **housing for older people**, specifically:
  - 5,000 units of age-designated social housing
  - 5,000 units of contemporary sheltered housing for social rent
  - 5,000 units of retirement housing for sale
- Approximately 5,000 units of **housing with care**:
  - 3,500 units of extra care housing for social rent
  - 1,500 units of extra care housing for sale (including shared ownership)
- Approximately 7,000 **nursing care** beds.
- No net need for additional **residential care** beds;
- Approximately 120 **step up/step down** housing units

Table 69a. Estimated shortfall in specialist accommodation for older people, by type and tenure, in each local authority and across Wales in total, by 2025.

	Age-designated social housing for rent (units)	Contemporary sheltered housing for social rent	Retirement housing for sale (units)	Housing with care for social rent (units)	Housing with care for sale (units)	Step up/step down housing (units)	Residential care (beds)	Nursing care (beds)
<b>Blaenau Gwent</b>	66	66	15	35	4	1	0	62
<b>Bridgend</b>	125	125	83	49	17	2	0	117
<b>Caerphilly</b>	174	174	116	67	23	2	0	162
<b>Cardiff</b>	340	340	76	131	15	3	0	286
<b>Carmarthenshire</b>	81	81	542	75	49	2	58	387
<b>Ceredigion</b>	107	107	129	45	38	1	43	153
<b>Conwy</b>	79	79	52	71	24	2	0	152
<b>Denbighshire</b>	121	121	81	53	18	1	0	102
<b>Flintshire</b>	64	64	68	81	45	2	0	128
<b>Gwynedd</b>	101	101	109	48	27	1	0	160
<b>Isle of Anglesey</b>	69	69	74	31	17	1	0	62
<b>Merthyr Tydfil</b>	52	52	11	28	3	1	0	39
<b>Monmouthshire</b>	119	119	128	28	15	1	0	139
<b>Neath Port Talbot</b>	116	116	77	52	18	2	0	165
<b>Newport</b>	120	120	80	59	20	2	0	111
<b>Pembrokeshire</b>	200	200	287	54	47	1	148	258
<b>Powys</b>	196	196	210	33	18	1	0	193
<b>Rhondda Cynon Taf</b>	207	207	46	58	7	2	0	226
<b>Swansea</b>	218	218	145	129	44	3	0	268
<b>Torfaen</b>	96	96	64	39	13	1	0	81
<b>Vale of Glamorgan</b>	62	62	163	67	91	2	0	160
<b>Wrexham</b>	117	117	78	63	23	7	0	151
<b>WALES (TOTAL)</b>	2824	2824	2634	1296	576	41	249	3562

Table 69b. Estimated shortfall in specialist accommodation for older people, by type and tenure, in each local authority and across Wales in total, by 2030.

	Age-designated social housing for rent (units)	Contemporary sheltered housing for social rent	Retirement housing for sale (units)	Housing with care for social rent (units)	Housing with care for sale (units)	Step up/step down housing (units)	Residential care (beds)	Nursing care (beds)
<b>Blaenau Gwent</b>	73	73	16	58	7	2	0	87
<b>Bridgend</b>	233	233	155	103	35	3	0	192
<b>Caerphilly</b>	255	255	170	116	40	3	0	249
<b>Cardiff</b>	297	297	593	205	211	6	0	435
<b>Carmarthenshire</b>	95	95	546	127	58	4	54	541
<b>Ceredigion</b>	140	140	172	59	48	1	54	206
<b>Conwy</b>	86	86	57	100	34	3	0	221
<b>Denbighshire</b>	173	173	115	89	30	2	0	154
<b>Flintshire</b>	91	91	98	131	73	4	0	200
<b>Gwynedd</b>	156	156	168	74	41	2	0	218
<b>Isle of Anglesey</b>	100	100	107	55	30	1	0	94
<b>Merthyr Tydfil</b>	83	83	18	56	6	2	0	67
<b>Monmouthshire</b>	191	191	206	47	26	1	0	223
<b>Neath Port Talbot</b>	202	202	135	95	33	4	0	262
<b>Newport</b>	177	177	118	97	34	4	0	159
<b>Pembrokeshire</b>	273	273	380	79	63	2	171	356
<b>Powys</b>	247	247	266	71	39	2	0	320
<b>Rhondda Cynon Taf</b>	295	295	65	115	13	4	0	312
<b>Swansea</b>	307	307	205	225	77	6	0	400
<b>Torfaen</b>	125	125	83	82	28	2	0	126
<b>Vale of Glamorgan</b>	94	94	249	108	148	4	0	244
<b>Wrexham</b>	184	184	123	128	47	14	0	230
<b>WALES (TOTAL)</b>	3874	3874	4045	2220	1121	76	279	5296

Table 69c. Estimated shortfall in specialist accommodation for older people, by type and tenure, in each local authority and across Wales in total, by 2035.

	Age-designated social housing for rent (units)	Contemporary sheltered housing for social rent	Retirement housing for sale (units)	Housing with care for social rent (units)	Housing with care for sale (units)	Step up/step down housing (units)	Residential care (beds)	Nursing care (beds)
<b>Blaenau Gwent</b>	85	85	19	88	10	3	0	117
<b>Bridgend</b>	355	355	237	171	57	5	0	272
<b>Caerphilly</b>	333	333	222	176	59	5	0	338
<b>Cardiff</b>	447	447	894	305	305	9	0	656
<b>Carmarthenshire</b>	55	55	532	212	73	6	64	698
<b>Ceredigion</b>	168	168	209	81	62	2	66	251
<b>Conwy</b>	100	100	66	156	52	5	0	301
<b>Denbighshire</b>	221	221	147	130	43	4	0	205
<b>Flintshire</b>	98	98	105	188	101	6	0	267
<b>Gwynedd</b>	320	320	224	105	57	3	0	276
<b>Isle of Anglesey</b>	127	127	137	82	44	2	0	128
<b>Merthyr Tydfil</b>	120	120	27	85	9	3	0	100
<b>Monmouthshire</b>	255	255	275	81	43	2	0	301
<b>Neath Port Talbot</b>	287	287	191	151	50	5	0	360
<b>Newport</b>	264	264	176	153	51	5	0	229
<b>Pembrokeshire</b>	291	291	313	122	90	4	199	443
<b>Powys</b>	402	402	433	134	72	4	0	440
<b>Rhondda Cynon Taf</b>	390	390	87	214	24	6	0	406
<b>Swansea</b>	388	388	258	345	115	10	0	544
<b>Torfaen</b>	144	144	96	125	42	4	0	169
<b>Vale of Glamorgan</b>	126	126	334	154	204	5	0	326
<b>Wrexham</b>	247	247	165	275	69	21	0	298
<b>WALES (TOTAL)</b>	5,160	5,160	5,177	3,533	1,632	119	329	7,125

## Annexe 1. Brief

The following brief was provided by the Welsh Government

*We are looking to understand the current provision and the future demand for housing for older people in Wales.*

**Specification:**

- *The existing provision of older people's housing per local authority. Presented in units of housing.*
- *The estimated demand for older people's housing per local authority area per year from 2020 – 2035. Presented in units of housing.*
- *For current provision and demand for older people's and specialist social care housing to be divided by type. For these types to be:*
  1. *Age designated social housing*
  2. *Sheltered housing*
  3. *Private retirement housing*
  4. *Extra Care housing*
  5. *Residential care*
  6. *Step-up and step-down housing*
  7. *Nursing care*

## Annexe 2. Contextual evidence: Local authority commissioning intent

Tables 70-91 show any stated intent by a local authority regarding housing for older people, housing with care, residential care or nursing care (see Section 3). This evidence has been identified from published data in the public domain. The time constraints for this work precluded direct contact with local authorities.

NB a '-' in the tables (below) indicates that it was not possible in the time available to identify commissioning intent from published sources.

It should be noted that the local authorities of Carmarthenshire, Ceredigion, Pembrokeshire, Cardiff and The Vale of Glamorgan have previously commissioned the Housing LIN to undertaken work including bespoke estimates of demand for each type of specialist accommodation for older people in their respective localities.

Table 70. Blaenau Gwent

Specialist housing and accommodation type	Intent/targets
Housing for Older People	-
Housing with Care	-
Residential Care	-
Nursing Care	-

Assumed to be similar commissioning intent to the other authorities covered by Aneurin Bevan University Health Board (see Caerphilly, Newport, Torfaen and Monmouthshire).

Table 71. Bridgend

Specialist housing and accommodation type	Intent/targets
Housing for Older People	"We will seek to develop suitable older person accommodation" <sup>40</sup> .
Housing with Care	"We will seek to develop suitable older person accommodation" ... "such as the provision of Extra Care housing" <sup>41</sup> .
Residential Care	"Given the alternative support mechanisms in place, and being developed, the need for residential care facilities for older people will continue to reduce although not disappear completely" <sup>42</sup> .
Nursing Care	-

<sup>40</sup> Bridgend County Borough Council (2016). Local Housing Strategy 2016 – 2018.

<sup>41</sup> *ibid.*

<sup>42</sup> Caring Together Western Bay Health and Social Care Programme (2016). Commissioning Strategy for Care Homes for Older People 2016 – 2025.

Table 72. Caerphilly

<b>Specialist housing and accommodation type</b>	<b>Intent/targets</b>
Housing for Older People	"Increase the provision of new, affordable, social housing that meet the 'Lifetime Homes' principles" <sup>43</sup> .
Housing with Care	-
Residential Care	-
Nursing Care	-

Table 73. Cardiff

<b>Specialist housing and accommodation type</b>	<b>Intent/targets</b>
Housing for Older People	Cardiff City Council has specified their proposed schemes, which include designated older persons', care ready, extra care and a retirement village <sup>44</sup> .
Housing with Care	Cardiff City Council has specified their proposed schemes, which include designated older persons', care ready, extra care and a retirement village <sup>45</sup> .
Residential Care	"The data suggests there is an over-provision of residential care places in Cardiff and the Vale of Glamorgan and an under-provision of nursing home places. There needs to be a further shift of provision from one to the other" <sup>46</sup> .
Nursing Care	"The data suggests there is an over-provision of residential care places in Cardiff and the Vale of Glamorgan and an under-provision of nursing home places. There needs to be a further shift of provision from one to the other" <sup>47</sup> .

Table 74. Carmarthenshire

<b>Specialist housing and accommodation type</b>	<b>Intent/targets</b>
Housing for Older People	-
Housing with Care	An interest in providing extra care housing, which may include "converting Sheltered Housing schemes to Extra Care schemes" <sup>48</sup> .
Residential Care	"Carmarthenshire needs to continue to reduce the reliance on care homes in favour of care at home services" <sup>49</sup> .
Nursing Care	-

<sup>43</sup> Caerphilly County Borough Council (2018). Corporate plan 2018-2023.

<sup>44</sup> Cardiff City Council (2019). Cardiff Older Persons Housing Strategy 2019-2023.

<sup>45</sup> *ibid.*

<sup>46</sup> Cardiff and Vale of Glamorgan Market Position Statement and Commissioning Strategy (2017): Care and Support Services for Older People 2017-2022.

<sup>47</sup> *ibid.*

<sup>48</sup> Carmarthenshire County Council (2015). Carmarthenshire's Vision for Sustainable Services for Older People for the Next Decade.

<sup>49</sup> *ibid.*

Table 75. Ceredigion

<b>Specialist housing and accommodation type</b>	<b>Intent/targets</b>
Housing for Older People	-
Housing with Care	"Ceredigion intends to increase the provision of Extra Care" <sup>50</sup> .
Residential Care	-
Nursing Care	-

Table 76. Conwy

<b>Specialist housing and accommodation type</b>	<b>Specialist housing and accommodation type</b>
Housing for Older People	"We will develop housing that supports independence" <sup>51</sup> .
Housing with Care	"Increased extra care housing availability" <sup>52</sup> .
Residential Care	"A reduction in general needs residential care placements, due to increased extra care housing availability and more care and support to live at home" <sup>53</sup> .
Nursing Care	Based on their use of the Housing LIN's SHOP@ tool and rising dementia rates, CCBC expect a shortage of nursing homes by 2030 <sup>54</sup> .

Table 77. Denbighshire

<b>Specialist housing and accommodation type</b>	<b>Intent/targets</b>
Housing for Older People	-
Housing with Care	"It is our intention to further develop additional extra care housing capacity" <sup>55</sup> . "[The council] are also investigating options to build a further three [extra care schemes]" <sup>56</sup> .
Residential Care	"A reduction in general needs residential care placements, due to increased extra care housing availability and more care and support to live at home" <sup>57</sup> .
Nursing Care	"There will be a need to increase the number of EMH Nursing beds" <sup>58</sup> .

<sup>50</sup> Mid and West Wales Health and Social Care Regional Collaborative (Hywel Dda University Health Board Area) (2015). Market Position Statement - Services for Older People.

<sup>51</sup> Conwy County Borough Council (2018). Social Care Commissioning Strategy 2018-2021.

<sup>52</sup> North Wales Social Care and Wellbeing Services Improvement Collaborative (2018). Market shaping statement: Care homes for older people in North Wales.

<sup>53</sup> *ibid.*

<sup>54</sup> Conwy County Borough Council (2017). Local Housing Market Assessment (LHMA) 2017-2022.

<sup>55</sup> Denbighshire County Council (2017). Community Support Services Market Position Statement and Commissioning Intentions.

<sup>56</sup> Denbighshire County Council (2016). Denbighshire's Housing Strategy 2016 – 2021.

<sup>57</sup> North Wales Social Care and Wellbeing Services Improvement Collaborative (2018). Market shaping statement: Care homes for older people in North Wales.

<sup>58</sup> Denbighshire County Council (2017). Community Support Services Market Position Statement and Commissioning Intentions.



Table 78. Flintshire

<b>Specialist housing and accommodation type</b>	<b>Intent/targets</b>
Housing for Older People	-
Housing with Care	"Increased extra care housing availability" <sup>59</sup> .
Residential Care	"A reduction in general needs residential care placements, due to increased extra care housing availability and more care and support to live at home" <sup>60</sup> .
Nursing Care	-

Table 79. Gwynedd

<b>Specialist housing and accommodation type</b>	<b>Intent/targets</b>
Housing for Older People	-
Housing with Care	The council's vision is to "increase the number of beds in Extra Care Housing or similar model to Extra Care Housing" <sup>61</sup> .
Residential Care	The council's vision is to "reduce the number of traditional residential beds" <sup>62</sup> .
Nursing Care	The council's vision is to "increase the number of nursing beds in some areas" <sup>63</sup> .

Table 80. Isle of Anglesey

<b>Specialist housing and accommodation type</b>	<b>Intent/targets</b>
Housing for Older People	-
Housing with Care	"Increased extra care housing availability" <sup>64</sup> .
Residential Care	"A reduction in general needs residential care placements, due to increased extra care housing availability and more care and support to live at home" <sup>65</sup> .
Nursing Care	-

Table 81. Merthyr Tydfil

<b>Specialist housing and accommodation type</b>	<b>Intent/targets</b>
Housing for Older People	"Our priority will be to ensure there is a comprehensive range of housing, and in

<sup>59</sup> North Wales Social Care and Wellbeing Services Improvement Collaborative (2018). Market shaping statement: Care homes for older people in North Wales.

<sup>60</sup> *ibid.*

<sup>61</sup> Gwynedd County Council Older People Accommodation Strategy – Appendix 1.

<sup>62</sup> *ibid.*

<sup>63</sup> *ibid.*

<sup>64</sup> North Wales Social Care and Wellbeing Services Improvement Collaborative (2018). Market shaping statement: Care homes for older people in North Wales.

<sup>65</sup> *ibid.*

	particular, housing with support options available for them, to retain independence and control over their living arrangements for as long as possible (e.g. adapted housing, sheltered housing and extra care housing) <sup>66</sup> .
Housing with Care	"Our priority will be to ensure there is a comprehensive range of housing, and in particular, housing with support options available for them, to retain independence and control over their living arrangements for as long as possible (e.g. adapted housing, sheltered housing and extra care housing) <sup>67</sup> .
Residential Care	-
Nursing Care	-

Table 82. Monmouthshire

<b>Specialist housing and accommodation type</b>	<b>Intent/targets</b>
Housing for Older People	-
Housing with Care	-
Residential Care	Due to prevention strategies, Monmouthshire expect "some reductions in the potential demand for beds" in the future <sup>68</sup> .
Nursing Care	-

Table 83. Neath Port Talbot

<b>Specialist housing and accommodation type</b>	<b>Intent/targets</b>
Housing for Older People	The council intends to "develop flexible housing and support services to enable Older People to remain safely at home" <sup>69</sup> .
Housing with Care	The council intends to "develop flexible housing and support services to enable Older People to remain safely at home" <sup>70</sup> .
Residential Care	"Given the alternative support mechanisms in place, and being developed, the need for residential care facilities for older people will continue to reduce although not disappear completely" <sup>71</sup> .
Nursing Care	-

<sup>66</sup> Rhondda Cynon Taf County Borough Council, Merthyr Tydfil County Borough Council and Cwm Taf University Health Board (2015). Joint Commissioning Statement For Older People's Services 2015-2025.

<sup>67</sup> *ibid.*

<sup>68</sup> Monmouthshire County Council (2014). Adult Social Care Commissioning Plan 2014-2017.

<sup>69</sup> Neath Port Talbot County Borough Council (2015). Local Housing Strategy 2015-2020.

<sup>70</sup> *ibid.*

<sup>71</sup> Caring Together Western Bay Health and Social Care Programme (2016). Commissioning Strategy for Care Homes for Older People 2016 – 2025.

Table 84. Newport

<b>Specialist housing and accommodation type</b>	<b>Intent/targets</b>
Housing for Older People	-
Housing with Care	-
Residential Care	The council expects "managed demand on residential and nursing placements" <sup>72</sup> .
Nursing Care	The council expects "managed demand on residential and nursing placements" <sup>73</sup> .

Table 85. Pembrokeshire

<b>Specialist housing and accommodation type</b>	<b>Intent/targets</b>
Housing for Older People	-
Housing with Care	-
Residential Care	"Generally, we intend to develop [a] greater focus on supporting people within their own homes, so potential reduction in residential care..." <sup>74</sup>
Nursing Care	"...but with demand for residential care with nursing being sustained" <sup>75</sup> .

Table 86. Powys

<b>Specialist housing and accommodation type</b>	<b>Intent/targets</b>
Housing for Older People	The council intends to "Provide well-designed housing that allows people to care for themselves for longer" <sup>76</sup> .
Housing with Care	The council intends to "Reorganise and modernise long-term care through developing Extra Care" <sup>77</sup> .
Residential Care	"There is falling demand for standard residential care services and current supply exceeds estimated demand overall" <sup>78</sup> . "There is a clear message from Powys citizens that they generally want to stay at home and therefore require alternative provision to residential care" <sup>79</sup> .
Nursing Care	-

<sup>72</sup> Newport City Council (2014). Newport Adult Services Market Position Statement 2014 – 2019.

<sup>73</sup> *ibid.*

<sup>74</sup> Mid and West Wales Health and Social Care Regional Collaborative (Hywel Dda University Health Board Area) (2015). Market Position Statement - Services for Older People.

<sup>75</sup> *ibid.*

<sup>76</sup> Powys County Council (2016). Joint Commissioning Strategy and Plan for older people in Powys 2016-2021.

<sup>77</sup> *ibid.*

<sup>78</sup> Powys Regional Partnership Board (2017). Health and Care strategy 2017-2027.

<sup>79</sup> *ibid.*

Table 87. Rhondda Cynon Taf

<b>Specialist housing and accommodation type</b>	<b>Intent/targets</b>
Housing for Older People	"providing alternatives [to residential and nursing care] which reduce dependency and promote independence" <sup>80</sup> .
Housing with Care	"providing alternatives [to residential and nursing care] which reduce dependency and promote independence" <sup>81</sup> .
Residential Care	"In the longer term, we will not continue to commission the residential category of care home and [will] replace it with better quality options to live in accommodation with support" <sup>82</sup> .
Nursing Care	-

Table 88. Swansea

<b>Specialist housing and accommodation type</b>	<b>Intent/targets</b>
Housing for Older People	-
Housing with Care	-
Residential Care	"Given the alternative support mechanisms in place, and being developed, the need for residential care facilities for older people will continue to reduce although not disappear completely" <sup>83</sup> .
Nursing Care	-

Table 89. Torfaen

<b>Specialist housing and accommodation type</b>	<b>Intent/targets</b>
Housing for Older People	-
Housing with Care	-
Residential Care	-
Nursing Care	-

Assumed to be similar commissioning intent to the other authorities covered by Aneurin Bevan University Health Board (see Blaenau Gwent, Caerphilly, Newport and Monmouthshire).

<sup>80</sup> Rhondda Cynon Taf County Borough Council (2016). Social Services and Wellbeing Act: Implementation Programme Joint Commissioning Statement for Older People.

<sup>81</sup> *ibid.*

<sup>82</sup> *ibid.*

<sup>83</sup> Caring Together Western Bay Health and Social Care Programme (2016). Commissioning Strategy for Care Homes for Older People 2016 – 2025.

Table 90. Vale of Glamorgan

<b>Specialist housing and accommodation type</b>	<b>Intent/targets</b>
Housing for Older People	-
Housing with Care	-
Residential Care	"The data suggests there is an over-provision of residential care places in Cardiff and the Vale of Glamorgan and an under-provision of nursing home places. There needs to be a further shift of provision from one to the other".
Nursing Care	"The data suggests there is an over-provision of residential care places in Cardiff and the Vale of Glamorgan and an under-provision of nursing home places. There needs to be a further shift of provision from one to the other".

Table 91. Wrexham

<b>Specialist housing and accommodation type</b>	<b>Intent/targets</b>
Housing for Older People	"A need to further develop affordable and appropriate housing for older people, including Warden Controlled Flats <sup>84</sup> ".
Housing with Care	"Increased extra care housing availability" <sup>85</sup> .
Residential Care	"A reduction in general needs residential care placements, due to increased extra care housing availability and more care and support to live at home" <sup>86</sup> .
Nursing Care	-

<sup>84</sup> Wrexham County Borough Council (2013). Commissioning Strategy for Older People's Services.

<sup>85</sup> North Wales Social Care and Wellbeing Services Improvement Collaborative (2018). Market shaping statement: Care homes for older people in North Wales.

<sup>86</sup> North Wales Social Care and Wellbeing Services Improvement Collaborative (2018). Market shaping statement: Care homes for older people in North Wales.

## Annexe 3. Estimated future need: tenure breakdown

Table 92 shows the 22 Welsh local authorities ranked by the percentage of their Lower Super Output Areas (LSOAs) that fall into the most deprived 10% of LSOAs in Wales, based on data from the Welsh Index of Multiple Deprivation. Based on this data and the Housing LIN's experience of working with local authorities and Registered Social Landlords in Wales, it is assumed that in relation to estimated demand for units for rent and for sale (including shared ownership) applying to both housing for older people and housing with care:

- Where over 15% of an authority's LSOAs are in the 10% most deprived nationally, there will be a 90%/10% breakdown between estimated demand for units for social rent and for sale (including shared ownership).
- Where between 5% and 15% of an authority's LSOAs are in the 10% most deprived nationally, there will be a 75%/25% breakdown between estimated demand for units for social rent and for sale (including shared ownership).
- Where less than 5% of an authority's LSOAs are in the 10% most deprived nationally, there will be a 65%/35% breakdown between estimated demand for units for social rent and for sale (including shared ownership).

The groupings of these percentages are an intended to use the natural groupings that emerged in Table 92 (e.g. the drop from 10.2% to 5.9% between Bridgend and Wrexham indicating a different group).

Home ownership rates from the most recent census were considered as an indication of what proportion of future specialist accommodation might be offered for sale in an authority area, instead of WIMD. However, the home ownership rate among over 65s was at least 70% in most authorities.

House price data and our experience of discussions with homeowners indicate that, in some areas, many of these homes would not necessarily release sufficient equity for sellers to consider buying a specialist property as an attractive (or perhaps, a possible) option. It was decided that WIMD would provide a more realistic indication of tenure choice of housing for older people than current tenure mix in the general housing stock amongst older households.

Table 92. Welsh local authorities ranked by relative deprivation and estimated tenure split.

Local Authority	% LSOAs in most-deprived 10%	% for rent assumed in SHOP@ analysis
Blaenau Gwent	23.4	90
Merthyr Tydfil	22.2	90
Cardiff	17.8	Established in the 2018 Housing LIN report for Cardiff & Vale of Glamorgan Regional Partnership Board <sup>87</sup> .
Rhondda Cynon Taf	16.9	90
Newport	14.7	75
Denbighshire	13.8	75
Neath Port Talbot	13.2	75
Caerphilly	12.7	75
Swansea	12.2	75
Bridgend	10.2	75
Wrexham	5.9	75
Conwy	5.6	75
Pembrokeshire	5.6	Established in the 2018 Housing LIN report for West Wales Care Partnership <sup>88</sup> .
Vale of Glamorgan	5.1	Established in the 2018 Housing LIN report for Cardiff & Vale of Glamorgan Regional Partnership Board <sup>89</sup> .
Torfaen	5.0	75
Carmarthenshire	4.5	Established in the 2018 Housing LIN report for West Wales Care Partnership <sup>90</sup> .
Gwynedd	4.1	65
Isle of Anglesey	2.3	65
Ceredigion	2.2	Established in the 2018 Housing LIN report for West Wales Care Partnership <sup>91</sup> .
Flintshire	2.2	65
Powys	1.3	65
Monmouthshire	0.0	65

Source: Welsh Index of Multiple Deprivation

<sup>87</sup> Housing LIN (2018). Assessment of Older Person's Housing and Accommodation including with Care and Care Ready: For Cardiff & Vale of Glamorgan Regional Partnership Board.

<sup>88</sup> Housing LIN (2018). Assessment of Specialist Housing and Accommodation Need for Older People in West Wales for West Wales Care Partnership.

<sup>89</sup> Housing LIN (2018). Assessment of Older Person's Housing and Accommodation including with Care and Care Ready: For Cardiff & Vale of Glamorgan Regional Partnership Board.

<sup>90</sup> Housing LIN (2018). Assessment of Specialist Housing and Accommodation Need for Older People in West Wales for West Wales Care Partnership.

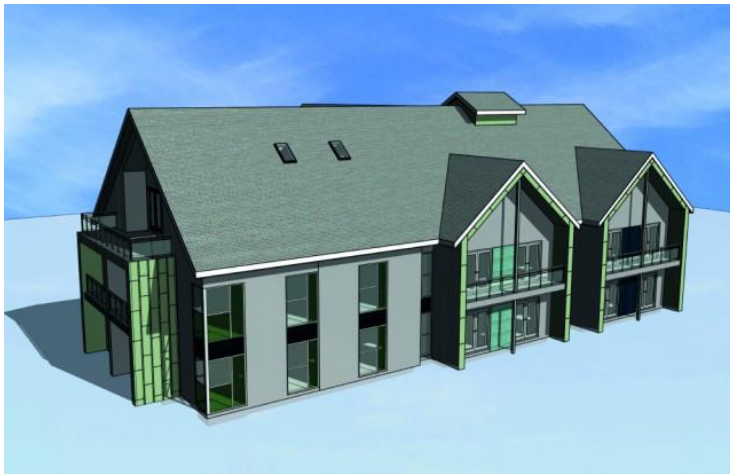
<sup>91</sup> Housing LIN (2018). Assessment of Specialist Housing and Accommodation Need for Older People in West Wales for West Wales Care Partnership.

## Annexe 4. Examples of specialist housing and accommodation for older people

The following are intended to provide illustrative examples of the different types of specialist housing and accommodation for older people referred to as part of this demand assessment. They are intended to be illustrative only.

### **Housing for older people**

#### *Age-designated social housing*



#### *Hen Eglwys*

#### *Newport*

#### *Pobl Group*

14 apartments for rent for people aged 55+; a combination of one and two bedrooms and include off street parking and amenity space. The properties are rented by Derwen Housing Association. The development has a large buggy store, and photovoltaic panels for lower service charge costs.

#### *Contemporary sheltered housing for social rent/shared ownership*





*Elker Meadows*

*Billington, Lancashire*

*St Vincent's Housing Association*

A scheme of 19, two-bedroomed apartments for rent and shared ownership, designed to 'HAPPI' principles. Has communal facilities for residents. Positioned not far from both Whalley and Clitheroe, Elker Meadows offers the opportunity for peaceful living whilst being close to nearby local amenities including supermarkets, surgeries, restaurants, bars and leisure activities. Staff support available for residents.

*Private retirement housing*



*De Clare Lodge*

*Cowbridge, Vale of Glamorgan,*

*Churchill Retirement Living*

Development of 37 new homes for sale in Cowbridge. Mix of one and two bedroom apartments. All units for private sale (leasehold). Communal facilities provided for residents. Limited on-site staff available for residents.

## **Housing with care**

*Extra care housing (for social rent and shared ownership)*



*Llys Jasmine*

*Mold, Flintshire*

*Wales & West Housing*

Llys Jasmine is managed by Wales & West Housing in partnership with Flintshire County Council. The scheme comprises 61 apartments (33 one bedroom, 28 two bedroom) and two two-bedroom bungalows for residents aged 65 and over with care and support needs. Fifteen of the purpose-built apartments are specifically designed for people with dementia and located in one area of the site. The scheme was built on the site of an existing Flintshire Council traditional sheltered housing scheme. It incorporates a range of design features, across the scheme, aimed at assisting people with dementia.

*Housing with care (private, for sale)*



*Llys Isan*

*Cardiff*

*McCarthy & Stone*

49 one and two bedroom apartments. For people aged 70+. Communal facilities provided for residents including a bistro. 24/7 staff on site. All units for private sale (leasehold).

**Step down/step up housing based services**

*Bath*

*Curo Group*

The Curo Step Down scheme in Bath, North East Somerset provides accommodation for vulnerable adults who are ready to be discharged from hospital but cannot return home.

The service offers six self-contained flats or bungalows with dedicated support and access to 24-hour care teams, allowing people to see how they manage with a care and support package in a place like their home. Step down units are provided by Curo, within or adjacent to extra care housing hubs. The service is provided on a 'free at the point of delivery' basis and is available seven days a week for periods of time agreed at the point of discharge.

Curo's step down service can offer transport from hospital, avoiding delays in access to non-emergency ambulance services. The emphasis is on relearning skills to improve future independence, supporting people to move into appropriate or adapted homes and reducing the risk of re-admission.

## Residential and nursing care

### *Residential care*



### *Llys y Seren*

### *Port Talbot*

### *Gwalia Care & Support*

Llys y Seren is situated in Baglan, close to local amenities. It provides long term residential care, respite stays and specialises in dementia care. Gwalia, working with the local Health Board, manages a reablement unit within the residential home which supports people who are well enough to leave hospital but who may need extra support before returning to their own home.

### *Nursing care*



*Capel Grange*

*Newport*

*Linc Care*

Capel Grange is Linc Care's first purpose built community nursing home in Newport. It opened in 2009. It is situated next to one of Linc's extra care housing schemes. The home provides nursing care for 72 people with a variety of care and physical needs including dementia and end of life care.