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Accommodation for older people – current supply, current need and future need

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Introduction

This report uses statistical analysis to produce accommodation needs for older people in Norfolk to 2036. The report is intended to be read in association with the Strategic Housing Market Assessments (SHMAs). The year 2036 was chosen because it is the basis of the Central Norfolk SHMA, which covers six administrative areas: Breckland, Broadland, North Norfolk, Norwich, South Norfolk and The Broads Authority. Great Yarmouth and King's Lynn & West Norfolk have separate SHMAs.

The analysis in this report uses the same council administrative boundaries as the SHMAs. The Broads Authority is not assessed separately because of its small population (6,271), which is divided between the relevant councils.

Figures are also provided for each of the five Clinical Commissioning Group (CCG) areas in Norfolk.

The purpose of the report is to provide a robust evidence base which can be used in planning the future provision of accommodation for older people. It is anticipated that it will be particularly useful:

- in helping the care sector to plan and commission services;
- in supporting Local Plan policies in their intentions to deliver Specialist Housing (such as housing with care).

The methodology used to produce the future need, is a tailored application of the well-established Strategic Housing for Older People Analysis Tool – SHOP@, produced and managed by Housing LIN and by the Elderly Accommodation Council (EAC).

Executive Summary

- This document contains the results and methodology of the modelling for older persons' accommodation (current supply/need and future need) across Norfolk. The year for the modelling is 2015, hence any references to current supply or need correspond to 2015.
- The forecasts are for the year 2036. This period was chosen to maintain consistency with the planning periods for the Strategic Housing Market Assessments (SHMAs).
- The estimated future need is based on the ONS Subnational Population Projections 2014 (ONS SNPP 2014) and it does not take into account local future housing developments.
- The total population in Norfolk is forecast to increase by 13% in 2036, with the highest increase in the population aged 75+ of 70%.
- The population aged 75 and over by District and CCG is forecasted to increase between 47% and 83%, with the greatest increase in Breckland and South Norfolk districts, and NHS South Norfolk CCG.
- The population aged between 65 and 74 (112,700 in 2015) are the people who might be planning their future accommodation needs. This is what drives the need in the next 10 years.
- The current supply of beds in Care homes for Norfolk is estimated to be 9,921, this is 660 beds less than the current need of 10,581. If current trend and policies continue, the estimated need for 2036 is 17,949 beds, this is 8,028 more beds than the current supply and is equivalent to an increase of 382 beds per year.
- The current unmet need in the number of beds is not evenly distributed across the districts, King's Lynn & West Norfolk and South Norfolk show the greatest unmet need of 469 and 411 beds respectively, whilst Breckland and Broadland show an excess of 114 and 347 beds respectively.
- In the same way, the current unmet need in the number of beds is not evenly distributed across the CCGs, NHS South Norfolk CCG and NHS West Norfolk CCG have the greatest unmet need of 416 and 348 beds respectively, whilst NHS North Norfolk CCG shows an excess of 297 beds.

- The current supply of Specialist Housing in Norfolk is estimated to be 8,808 units, this is nearly half of the estimated current need of 16,352 units (unmet need of 7,543 units). If the current trend and policies continue, the estimated need for 2036 is 27,737 units, this is 18,928 more units than the current supply and is equivalent to an increase of 1,721 units per year.
- The current unmet need of 7,543 units can be broken down by housing type, with 4,080 for Sheltered Housing and 3,463 for Housing with Care.
- Approximately 7% of Norfolk's population aged 65 and over that are renting accommodation, live in specialist housing.

Demographics

- The total population in Norfolk is forecasted to increase by 13% in 2036¹, but the population increase varies significantly across the different age groups, with the highest increase in the population aged 75+ of 70%.

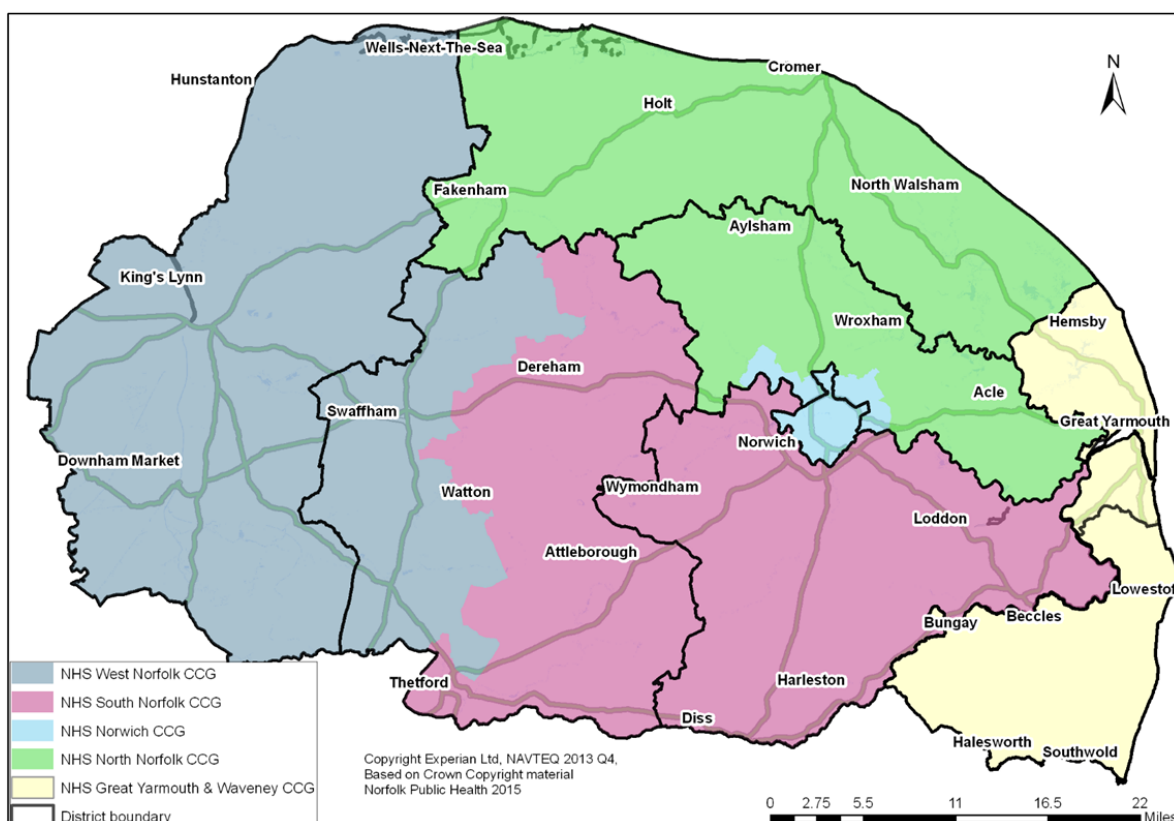
Table 1 Population in Norfolk for 2015 and 2036

	Norfolk population	Population 0-19	Population 20-64	Population 65-74	Population 75+
2015	883,700	187,800	487,000	112,700	96,200
2036	1,002,100	204,800	497,800	136,300	163,200
2015 vs 2036	13%	9%	2%	21%	70%

Source: ONS 2014 SNPP

- The population aged between 65 and 74 (112,700 in 2015) are the people who might be planning their future accommodation needs. This is what drives the need in the next 10 years.
- Norfolk is divided into 7 districts and 5 CCGs as follows:
 - NHS Great Yarmouth and Waveney CCG is coterminous with the Great Yarmouth borough and Waveney district.
 - NHS North Norfolk CCG includes all of North Norfolk district and most of Broadland district.
 - NHS Norwich CCG includes all of Norwich district and some of Broadland district.
 - NHS South Norfolk CCG includes all of South Norfolk district and about half of Breckland district.
 - NHS West Norfolk CCG includes all of King's Lynn and West Norfolk district and about half of Breckland district.

Figure 1 Norfolk's Districts and CCGs boundaries



¹ ONS Subnational Population Projections 2014

- The population aged 75 and over by District and CCG is forecasted to increase between 47% and 83%, with the greatest increase in Breckland and South Norfolk districts, and NHS South Norfolk CCG as shown in Table 2.

Table 2 Population aged 75 and over for 2015 and 2036 by District and CCG

District	2015	2036	Increase 2015/36	CCG	2015	2036	Increase 2015/36
Breckland	14,800	26,800	81%	NHS Great Yarmouth and Waveney*	10,100	17,200	70%
Broadland	14,700	25,100	71%	NHS North Norfolk	22,500	37,700	68%
Great Yarmouth	10,100	17,200	70%	NHS Norwich	17,500	27,500	57%
Kings Lynn and West Norfolk	17,400	28,600	64%	NHS South Norfolk	25,500	46,400	82%
North Norfolk	15,300	25,500	67%	NHS West Norfolk	20,600	34,400	67%
Norwich	9,900	14,600	47%	*Great Yarmouth population only			
South Norfolk	13,900	25,400	83%				

Source: ONS 2014 SNPP

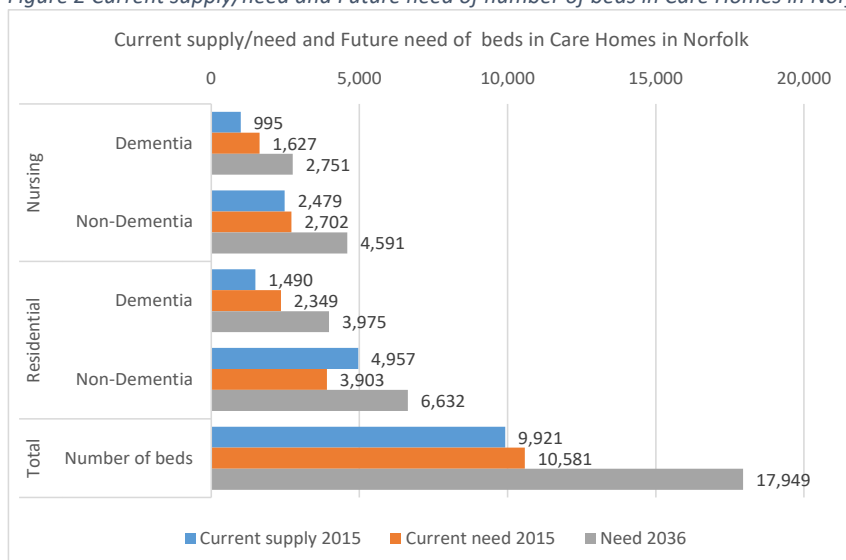
- Note population figures are presented rounded to the nearest hundred in compliance with ONS guidance, hence the total population might not add up.
- Appendix 1 includes various maps of Norfolk's current demographics, including populations 65-74, 75-84, 75+, 85+ and 2036 estimated population 65+.

Estimated supply and need of accommodation for older people

Care Homes Norfolk

- The current supply of beds in Care homes for Norfolk is estimated to be 9,921, this is 660 beds less than the current need of 10,581. If current trend and policies continue, the estimated need for 2036 is 17,949 beds, this is 8,028 more beds than the current supply and is equivalent to an increase of 382 beds per year.
- The Care Homes supply and need have been broken down by Care Home type, i.e. Nursing and Residential, defined by the Elderly Accommodation Council (EAC) as follows:
 - o *Residential care:* Where a care home is registered to provide residential (personal) care only, all beds are allocated to residential care.
 - o *Nursing care:* Where a care home is registered to provide nursing care all beds are allocated to nursing care, although in practice not all residents might be in need of or receiving nursing care.
- The current supply/need and future need by Care Home type, and by the number of dementia beds is shown in Figure 2.

Figure 2 Current supply/need and Future need of number of beds in Care Homes in Norfolk, by Care Home type including dementia beds.



Care Homes by district

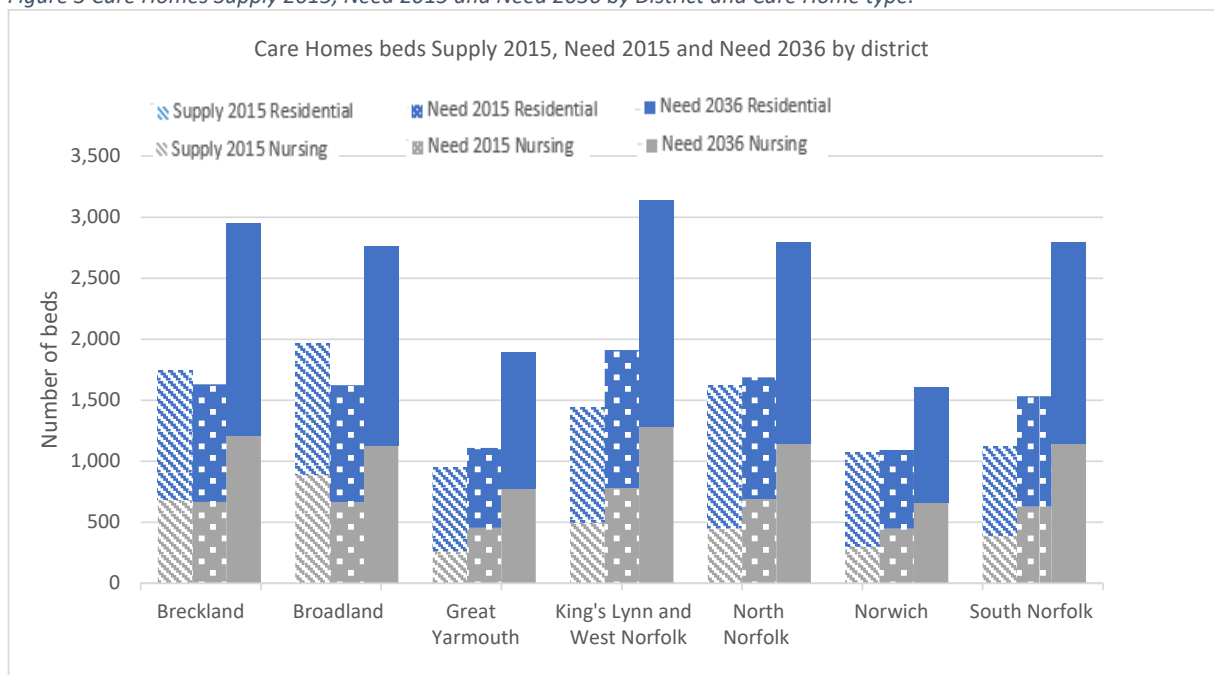
- The current unmet need in the number of beds is not evenly distributed across the districts as shown in Table 3, King's Lynn & West Norfolk and South Norfolk show the greatest unmet need of 469 and 411 beds respectively, whilst Breckland and Broadland show an excess of 114 and 347 beds respectively.

Table 3 Care Homes Supply 2015, Need 2015 and Need 2036 by district.

District	Current Supply	Current need	Current unmet need	% Current unmet need	Future need	Future unmet need	% Future unmet need
Breckland	1,744	1,630	-114	-7%	2,951	1,207	69%
Broadland	1,969	1,622	-347	-18%	2,762	793	40%
Great Yarmouth	951	1,109	158	17%	1,892	941	99%
King's Lynn and West Norfolk	1,441	1,910	469	33%	3,142	1,701	118%
North Norfolk	1,621	1,687	66	4%	2,800	1,179	73%
Norwich	1,074	1,091	17	2%	1,608	534	50%
South Norfolk	1,121	1,532	411	37%	2,794	1,673	149%
Norfolk	9,921	10,581	660	7%	17,949	8,028	81%

- Note that the totals districts may vary to the Norfolk figure due to rounding.
- The current need/supply and future need broken down by District and Care Home type is shown in Figure 3.

Figure 3 Care Homes Supply 2015, Need 2015 and Need 2036 by District and Care Home type.



- The breakdown for each district of the Care Homes supply 2015, need 2015 and need 2036 by care home type and number of dementia beds is shown in Table 4 and the unmet need in Table 5.
- The methodology on how these numbers were calculated is detailed in Appendix 2.

Table 4 Care Homes Supply 2015, Need 2015 and Need 2036 by district, accommodation type and number of dementia beds.

District	Nursing beds for dementia	Nursing only	Total Nursing beds	Residential beds for dementia	Residential beds only	Total Residential beds	Total Care Home beds
Current supply 2015							
Breckland	211	471	682	294	768	1,062	1,744
Broadland	265	625	890	219	860	1,079	1,969
Great Yarmouth	105	161	266	243	442	685	951
King's Lynn and West Norfolk	147	349	496	213	732	945	1,441
North Norfolk	65	384	449	220	952	1,172	1,621
Norwich	109	195	304	116	654	770	1,074
South Norfolk	93	294	387	185	549	734	1,121
Total	995	2,479	3,474	1,490	4,957	6,447	9,921
Estimated need 2015							
Breckland	297	370	667	429	534	963	1,630
Broadland	274	390	664	395	563	958	1,622
Great Yarmouth	177	277	454	255	400	655	1,109
King's Lynn and West Norfolk	247	534	781	357	772	1,129	1,910
North Norfolk	284	406	690	410	587	997	1,687
Norwich	187	259	446	271	374	645	1,091
South Norfolk	161	466	627	232	673	905	1,532
Total	1,627	2,702	4,329	2,349	3,903	6,252	10,581
Estimated need 2036							
Breckland	538	669	1,207	777	967	1,744	2,951
Broadland	466	664	1,130	673	959	1,632	2,762
Great Yarmouth	301	473	774	435	683	1,118	1,892
King's Lynn and West Norfolk	406	879	1,285	587	1,270	1,857	3,142
North Norfolk	471	674	1,145	681	974	1,655	2,800
Norwich	276	382	658	399	551	950	1,608
South Norfolk	293	850	1,143	423	1,228	1,651	2,794
Total	2,751	4,591	7,342	3,975	6,632	10,607	17,949

Table 5 Unmet Need 2015 and 2036 by district, accommodation type and number of dementia beds.

District	Nursing beds for dementia	Nursing only	Total Nursing beds	Residential beds for dementia	Residential beds only	Total Residential beds	Total Care Home beds
Unmet need 2015							
Breckland	86	-101	-15	135	-234	-99	-114
Broadland	9	-235	-226	176	-297	-121	-347
Great Yarmouth	72	116	188	12	-42	-30	158
King's Lynn and West Norfolk	100	185	285	144	40	184	469
North Norfolk	219	22	241	190	-365	-175	66
Norwich	78	64	142	155	-280	-125	17
South Norfolk	68	172	240	47	124	171	411
Total	632	223	855	859	-1,054	-195	660
Unmet need 2036							
Breckland	327	198	525	483	199	682	1,207
Broadland	201	39	240	454	99	553	793
Great Yarmouth	196	312	508	192	241	433	941
King's Lynn and West Norfolk	259	530	789	374	538	912	1,701
North Norfolk	406	290	696	461	22	483	1,179
Norwich	167	187	354	283	-103	180	534
South Norfolk	200	556	756	238	679	917	1,673
Total	1,756	2,112	3,868	2,485	1,675	4,160	8,028

Care Homes by CCG

- In the same way, the current unmet need in the number of beds is not evenly distributed across the CCGs as shown in Table 6, NHS South Norfolk CCG and NHS West Norfolk CCG have the greatest unmet need of 416 and 348 beds respectively, whilst NHS North Norfolk CCG shows an excess of 297 beds.

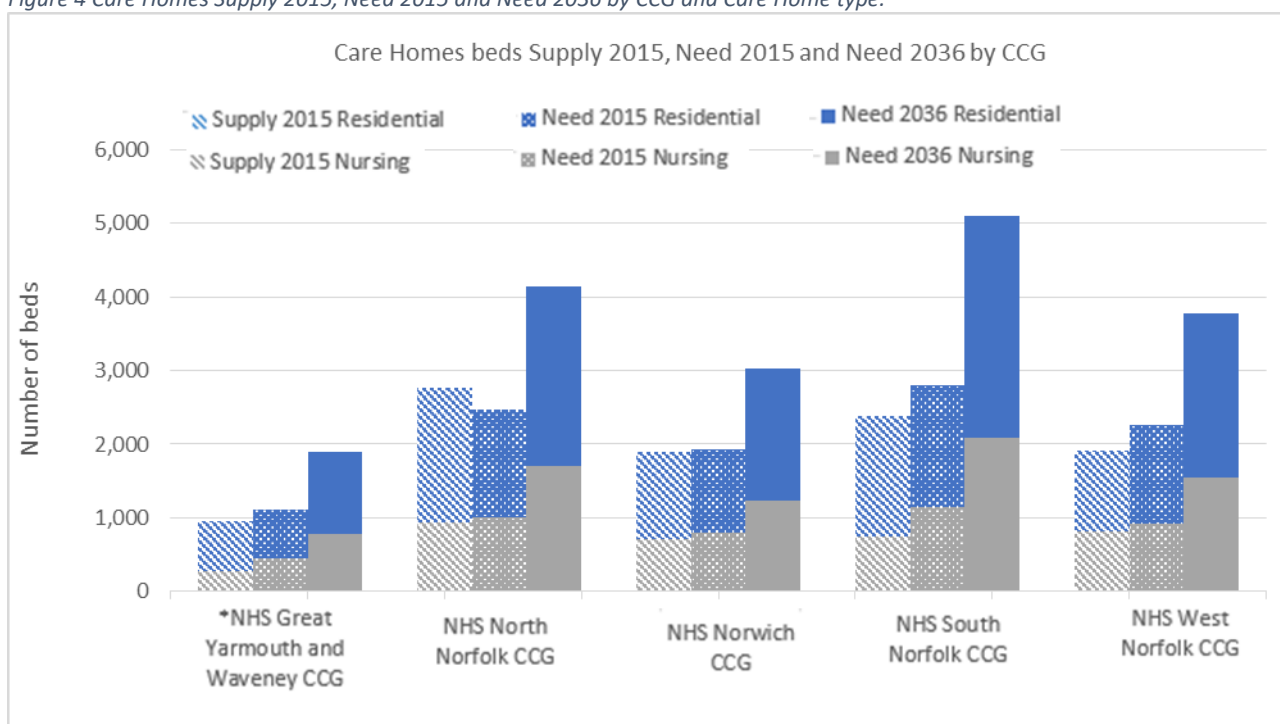
Table 6 Care Homes Supply 2015, Need 2015 and Need 2036 by CCG.

CCG	Current Supply	Current need	Current unmet need	% Current unmet need	Future need	Future unmet need	% Future unmet need
*NHS Great Yarmouth and Waveney	951	1,109	158	17%	1,892	941	99%
NHS North Norfolk	2,768	2,471	-297	-11%	4,144	1,376	50%
NHS Norwich	1,896	1,930	34	2%	3,024	1,128	59%
NHS South Norfolk	2,391	2,807	416	17%	5,102	2,711	113%
NHS West Norfolk	1,915	2,263	348	18%	3,785	1,870	98%
Total	9,921	10,580	659	7%	17,947	8,026	81%

*Great Yarmouth part only of NHS Great Yarmouth and Waveney CCG

- The current need/supply and future need broken down by CCG and Care Home type is shown in Figure 4.

Figure 4 Care Homes Supply 2015, Need 2015 and Need 2036 by CCG and Care Home type.



*Great Yarmouth part only

- The breakdown by CCG of the Care Homes supply 2015, need 2015 and need 2036 by care home type and number of dementia beds is shown in Table 7 and the unmet need in Table 8.
- The methodology on how these numbers were calculated is detailed in Appendix 2.

Table 7 Care Homes Supply 2015, Need 2015 and Need 2036 by CCG, accommodation type and number of dementia beds.

CCG	Nursing beds for dementia	Nursing only	Total Nursing beds	Residential beds for dementia	Residential beds only	Total Residential beds	Total Care Home beds
Current supply 2015*							
*NHS Great Yarmouth and Waveney	105	161	266	243	442	685	951
NHS North Norfolk	238	695	933	362	1,473	1,835	2,768
NHS Norwich	200	510	710	194	992	1,186	1,896
NHS South Norfolk	189	560	749	437	1,205	1,642	2,391
NHS West Norfolk	262	554	816	255	844	1,099	1,915
Total	994	2,480	3,474	1,491	4,956	6,447	9,921
Estimated need 2015							
*NHS Great Yarmouth and Waveney	177	277	454	255	400	655	1,109
NHS North Norfolk	481	530	1,011	694	766	1,460	2,471
NHS Norwich	264	525	789	382	759	1,141	1,930
NHS South Norfolk	394	754	1,148	569	1,090	1,659	2,807
NHS West Norfolk	310	616	926	448	889	1,337	2,263
Total	1,626	2,702	4,328	2,348	3,904	6,252	10,580
Estimated need 2036							
*NHS Great Yarmouth and Waveney	301	473	774	435	683	1,118	1,892
NHS North Norfolk	806	889	1,695	1,165	1,284	2,449	4,144
NHS Norwich	414	823	1,237	598	1,189	1,787	3,024
NHS South Norfolk	716	1,371	2,087	1,035	1,980	3,015	5,102
NHS West Norfolk	519	1,029	1,548	750	1,487	2,237	3,785
Total	2,756	4,585	7,341	3,983	6,623	10,606	17,947

Table 8 Unmet Need 2015 and 2036 by CCG, accommodation type and number of dementia beds.

CCG	Nursing beds for dementia	Nursing only	Total Nursing beds	Residential beds for dementia	Residential beds only	Total Residential beds	Total Care Home beds
Unmet need 2015							
*NHS Great Yarmouth and Waveney	72	116	188	12	-42	-30	158
NHS North Norfolk	243	-165	78	332	-707	-375	-297
NHS Norwich	64	15	79	188	-233	-45	34
NHS South Norfolk	205	194	399	132	-115	17	416
NHS West Norfolk	48	62	110	193	45	238	348
Total	632	222	854	857	-1,052	-195	659
Unmet need 2036							
*NHS Great Yarmouth and Waveney	196	312	508	192	241	433	941
NHS North Norfolk	568	194	762	803	-189	614	1,376
NHS Norwich	214	313	527	404	197	601	1,128
NHS South Norfolk	527	811	1,338	598	775	1,373	2,711
NHS West Norfolk	257	475	732	495	643	1,138	1,870
Total	1,762	2,105	3,867	2,492	1,667	4,159	8,026

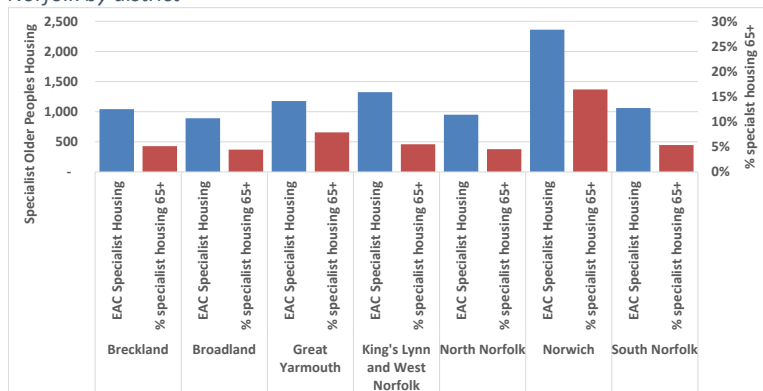
* Great Yarmouth part only of NHS Great Yarmouth and Waveney CCG

- Please note that the minor differences in the totals between Table 4 & Table 6, and Table 5 & Table 7 are due to rounding.

Specialist Housing Norfolk

- The Specialist Housing in this analysis comprises Sheltered Housing, Enhanced Sheltered Housing and Housing with Care as defined in the Elderly Accommodation Council (EAC) as follows:
 - o *Sheltered housing*: Schemes / properties where some form of scheme manager (warden) service is provided on site on a regular basis but where **no registered personal care is provided**. A regularly visiting scheme manager service may qualify as long as s/he is available to all residents when on site. An on-call-only service does not qualify. In most cases schemes will also include traditional shared facilities - a residents' lounge and possibly laundry and garden.
 - o *Enhanced sheltered housing*: Schemes / properties where service provision is higher than for sheltered housing but below extra care level. Typically there **may be 24/7 staffing cover**, at least one daily meal will be provided and there may be additional shared facilities. **This has been allocated to Housing with Care.**
 - o *Housing with care (Extra care housing 24/7 support)*: Schemes / properties where care (registered personal care) is **available on site 24/7**.
- The current supply of Specialist Housing in Norfolk is estimated to be 8,808 units, this is nearly half of the estimated current need of 16,352 units (unmet need of 7,543 units). If current trend and policies continue, the estimated need for 2036 is 27,737 units, this is 18,928 more units than the current supply and is equivalent to an increase of 1,721 units per year.
- The breakdown by district of the estimated current supply of specialist housing units for older people in Norfolk and the corresponding percentage of households where the age of the Household Reference Person (HRP) is 65 or over is shown in Figure 5 and Table 9. Table 9 shows that approximately 7% of Norfolk's population aged 65 and over that are renting accommodation, live in specialist housing.
- The estimated number of households for 2015 where the age of the HRP is 65 or over, was obtained by applying the population increase from 2011 to 2015 at district level, to the Census 2011 statistics for household life stage data.

Figure 5 Estimate of current supply specialist housing units for older people in Norfolk by district



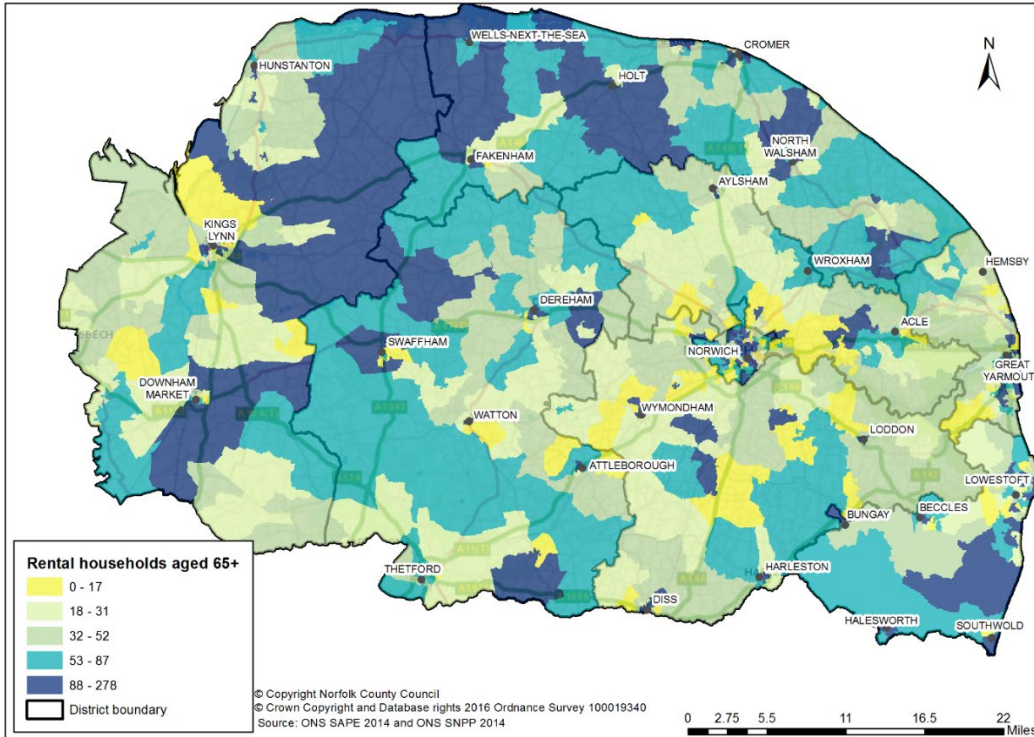
Source: ONS Census 2011 and ONS 2014 SNPP.

Table 9 Estimate of current supply specialist housing including 65+ HRPs

District	EAC Specialist Housing	All 65+ HRPs	% specialist housing 65+
Breckland	1,042	20,300	5%
Broadland	891	20,033	4%
Great Yarmouth	1,177	14,957	8%
King's Lynn and West Norfolk	1,325	24,043	6%
North Norfolk	950	20,991	5%
Norwich	2,363	14,379	16%
South Norfolk	1,060	19,808	5%
Norfolk	8,808	134,511	7%

- Figure 6 shows the distribution across Norfolk of households where the HRP is aged 65 and over, and renting accommodation.

Figure 6 Map of the estimated households with HRP 65+ and renting accommodation



- The current unmet need of 7,543 units can be broken down by housing type, with 4,080 for Sheltered Housing and 3,463 for Housing with Care.

Table 10 Housing units unmet need by housing type

Housing Type	Supply 2015	Need 2015	Unmet need 2015	% Unmet need	Need 2036	Unmet need 2036	% Unmet need
Sheltered Housing	7,943	12,023	4,080	51%	20,395	12,452	157%
Housing with Care	865	4,328	3,463	400%	7,342	6,477	749%
Total Housing	8,808	16,351	7,543	86%	27,737	18,929	215%

- The current supply/need and future need, by housing type and the number of dementia units is shown in Figure 7, and by housing type and tenure in Figure 8.

Figure 7 Current Supply/Need and Future need of specialised housing units in Norfolk by dementia units

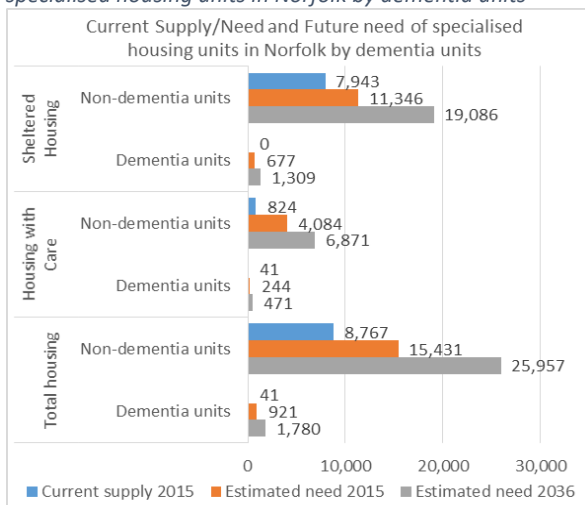
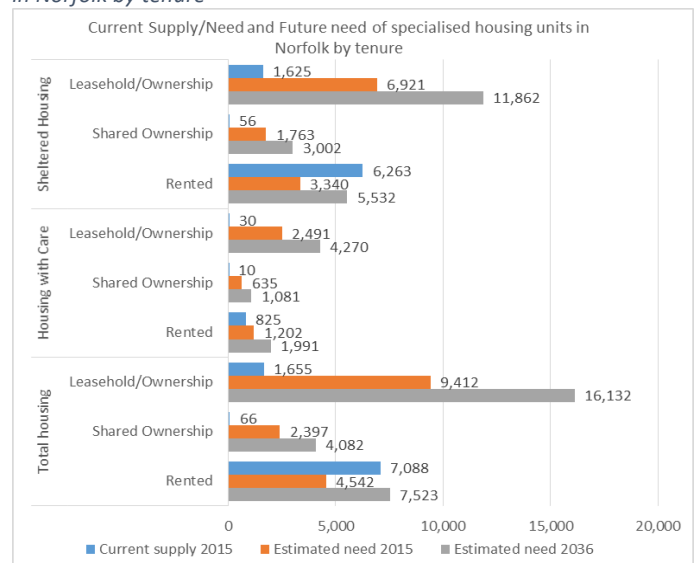


Figure 8 Current Supply/Need and Future need of specialised housing units in Norfolk by tenure



Specialist Housing by district

- The breakdown of Specialist **housing supply and need** by district, housing type and number of dementia units is as follows:

Table 11 Specialist housing supply and need by district, housing type and dementia units

District	Sheltered Housing						Housing with Care (Extra care) / Enhanced Sheltered						Total Housing Units
	Dementia units	Non-dementia units	Rented	Shared Ownership	Leasehold/ Ownership	Total Sheltered Housing	Dementia units	Non-dementia units	Rented	Shared Ownership	Leasehold/ Ownership	Total Housing with Care	
Current supply 2015													
Breckland	0	933	800	12	121	933	0	109	109	0	0	109	1,042
Broadland	0	801	507	14	281	801	0	90	50	10	30	90	891
Great Yarmouth	0	1,113	1,012	30	71	1,113	0	64	64	0	0	64	1,177
King's Lynn and West Norfolk	0	1,249	985	0	264	1,249	10	66	76	0	0	76	1,325
North Norfolk	0	880	570	0	310	880	0	70	70	0	0	70	950
Norwich	0	2,126	1,672	0	454	2,126	21	216	237	0	0	237	2,363
South Norfolk	0	841	717	0	124	841	10	209	219	0	0	219	1,060
Total	0	7,943	6,263	56	1,625	7,943	41	824	825	10	30	865	8,808
Estimated need 2015													
Breckland	97	1,755	402	316	1,134	1,852	35	632	145	114	408	667	2,519
Broadland	101	1,742	37	157	1,649	1,843	36	627	13	57	594	664	2,507
Great Yarmouth	69	1,192	614	195	451	1,261	25	429	221	70	162	454	1,714
King's Lynn and West Norfolk	127	2,043	790	394	985	2,170	46	735	285	142	355	781	2,951
North Norfolk	106	1,810	640	412	864	1,916	38	652	230	148	311	690	2,606
Norwich	70	1,170	741	102	398	1,240	25	421	267	37	143	447	1,687
South Norfolk	107	1,634	115	186	1,439	1,741	38	588	42	67	518	627	2,368
Total	677	11,346	3,340	1,763	6,921	12,023	244	4,084	1,202	635	2,491	4,328	16,352
Estimated need 2036													
Breckland	203	3,151	733	574	2,047	3,354	73	1,134	264	207	737	1,208	4,562
Broadland	199	2,939	66	271	2,801	3,138	71	1,058	24	97	1,009	1,130	4,268
Great Yarmouth	135	2,013	1,055	332	761	2,148	49	725	380	120	274	773	2,922
King's Lynn and West Norfolk	238	3,333	1,310	646	1,615	3,571	86	1,200	472	233	581	1,285	4,856
North Norfolk	200	2,982	1,069	687	1,426	3,182	72	1,074	385	247	514	1,146	4,328
Norwich	110	1,717	1,086	150	591	1,827	40	618	391	54	213	658	2,485
South Norfolk	224	2,950	213	342	2,619	3,174	81	1,062	77	123	943	1,143	4,317
Total	1,309	19,086	5,532	3,002	11,862	20,395	471	6,871	1,991	1,081	4,270	7,342	27,737

- The breakdown of Specialist **housing unmet need** by district, housing type and number of dementia units is as follows:

Table 12 Specialist housing unmet need by district, housing type and dementia units

District	Sheltered Housing						Housing with Care (Extra care) / Enhanced Sheltered						Total Housing Units
	Dementia units	Non-dementia units	Rented	Shared Ownership	Leasehold/ Ownership	Total Sheltered Housing	Dementia units	Non-dementia units	Rented	Shared Ownership	Leasehold/ Ownership	Total Housing with Care	
Unmet need 2015													
Breckland	97	822	-398	304	1,013	919	35	523	36	114	408	558	1,477
Broadland	101	941	-470	143	1,368	1,041	36	537	-37	47	564	574	1,615
Great Yarmouth	69	79	-398	165	380	148	25	365	157	70	162	390	537
King's Lynn and West Norfolk	127	794	-195	394	721	921	36	669	209	142	355	705	1,626
North Norfolk	106	930	70	412	554	1,036	38	582	160	148	311	620	1,656
Norwich	70	-956	-931	102	-56	-886	4	205	30	37	143	210	-676
South Norfolk	107	793	-602	186	1,315	900	28	379	-177	67	518	408	1,308
Total	677	3,403	-2,923	1,707	5,296	4,079	203	3,260	377	625	2,461	3,463	7,543
Unmet need 2036													
Breckland	203	2,218	-67	562	1,926	2,421	73	1,025	155	207	737	1,099	3,520
Broadland	199	2,138	-441	257	2,520	2,336	71	968	-26	87	979	1,040	3,376
Great Yarmouth	135	900	43	302	690	1,035	49	661	316	120	274	709	1,745
King's Lynn and West Norfolk	238	2,084	325	646	1,351	2,322	76	1,134	396	233	581	1,209	3,531
North Norfolk	200	2,102	499	687	1,116	2,302	72	1,004	315	247	514	1,076	3,378
Norwich	110	-409	-586	150	137	-299	19	402	154	54	213	421	122
South Norfolk	224	2,109	-504	342	2,495	2,333	71	853	-142	123	943	924	3,257
Total	1,309	11,143	-731	2,946	10,237	12,451	430	6,047	1,166	1,071	4,240	6,477	18,928

Specialist Housing by CCG

- The Specialist housing supply and need broken down by CCG, housing type and number of dementia units is as follows:

Table 13 Specialist housing supply and need by CCG, housing type and dementia units

District	Sheltered Housing						Housing with Care (Extra care) / Enhanced Sheltered						Total Housing Units
	Dementia units	Non-dementia units	Rented	Shared Ownership	Leasehold/Ownership	Total Sheltered Housing	Dementia units	Non-dementia units	Rented	Shared Ownership	Leasehold/Ownership	Total Housing with Care	
Current supply 2015													
*NHS Great Yarmouth and W	0	1,113	1,012	30	71	1,113	0	64	64	0	0	64	1,177
NHS North Norfolk CCG	0	1,363	930	14	420	1,363	0	120	80	10	30	120	1,483
NHS Norwich CCG	0	2,444	1,819	0	625	2,444	21	256	277	0	0	277	2,721
NHS South Norfolk CCG	0	1,594	1,377	12	205	1,594	10	300	310	0	0	310	1,904
NHS West Norfolk CCG	0	1,429	1,125	0	304	1,429	10	84	94	0	0	94	1,523
Total	0	7,943	6,263	56	1,625	7,943	41	824	825	10	30	865	8,808
Estimated need 2015													
*NHS Great Yarmouth and W	69	1,192	614	195	451	1,261	25	429	221	70	162	454	1,714
NHS North Norfolk CCG	145	2,662	677	514	1,616	2,807	52	958	244	185	582	1,011	3,817
NHS Norwich CCG	133	2,060	741	157	1,295	2,193	48	742	267	56	466	789	2,982
NHS South Norfolk CCG	183	3,007	383	421	2,386	3,190	66	1,083	138	151	859	1,148	4,339
NHS West Norfolk CCG	149	2,424	925	475	1,173	2,573	54	872	333	171	422	926	3,499
Total	679	11,344	3,340	1,763	6,921	12,023	244	4,084	1,202	635	2,491	4,328	16,352
Estimated need 2036													
*NHS Great Yarmouth and W	135	2,013	1,055	332	761	2,148	49	725	380	120	274	773	2,922
NHS North Norfolk CCG	278	4,432	1,135	863	2,712	4,710	100	1,596	408	311	976	1,696	6,405
NHS Norwich CCG	230	3,208	1,086	244	2,107	3,438	83	1,155	391	88	759	1,238	4,675
NHS South Norfolk CCG	383	5,415	704	769	4,325	5,798	138	1,949	253	277	1,557	2,087	7,885
NHS West Norfolk CCG	283	4,018	1,553	792	1,956	4,301	102	1,447	559	285	704	1,548	5,850
Total	1,309	19,086	5,532	3,002	11,862	20,395	471	6,871	1,991	1,081	4,270	7,342	27,737

- The Specialist housing unmet need broken down by CCG, housing type and number of dementia units is as follows:

Table 14 Specialist housing unmet need by CCG, housing type and dementia units

District	Sheltered Housing						Housing with Care (Extra care) / Enhanced Sheltered						Total Housing Units
	Dementia units	Non-dementia units	Rented	Shared Ownership	Leasehold/Ownership	Total Sheltered Housing	Dementia units	Non-dementia units	Rented	Shared Ownership	Leasehold/Ownership	Total Housing with Care	
Unmet need 2015													
*NHS Great Yarmouth and W	69	79	-398	165	380	148	25	365	157	70	162	390	537
NHS North Norfolk CCG	145	1,299	-253	500	1,196	1,443	52	838	164	175	552	891	2,333
NHS Norwich CCG	133	-384	-1,078	157	670	-251	27	486	-10	56	466	512	261
NHS South Norfolk CCG	183	1,413	-994	409	2,181	1,596	56	783	-172	151	859	838	2,435
NHS West Norfolk CCG	149	995	-200	475	869	1,144	44	788	239	171	422	832	1,976
Total	679	3,401	-2,923	1,707	5,296	4,079	203	3,260	377	625	2,461	3,463	7,543
Unmet need 2036													
*NHS Great Yarmouth and W	135	900	43	302	690	1,035	49	661	316	120	274	709	1,745
NHS North Norfolk CCG	278	3,069	205	849	2,292	3,346	100	1,476	328	301	946	1,576	4,921
NHS Norwich CCG	230	764	-733	244	1,482	994	62	899	114	88	759	961	1,954
NHS South Norfolk CCG	383	3,821	-673	757	4,120	4,204	128	1,649	-57	277	1,557	1,777	5,981
NHS West Norfolk CCG	283	2,589	428	792	1,652	2,872	92	1,363	465	285	704	1,454	4,327
Total	1,309	11,143	-731	2,946	10,237	12,451	430	6,047	1,166	1,071	4,240	6,477	18,928

- Please note that the minor differences in the totals between Table 11 & Table 13, and Table 12 & Table 14 are due to rounding.

Contextual indicators for Norfolk

- The following figure shows the estimated change in contextual indicators for the population in Norfolk aged 65 and over, for 2015 and 2036.

Figure 9 Estimated change in contextual indicators for those aged 65+ who live in Norfolk, for 2015 and 2036

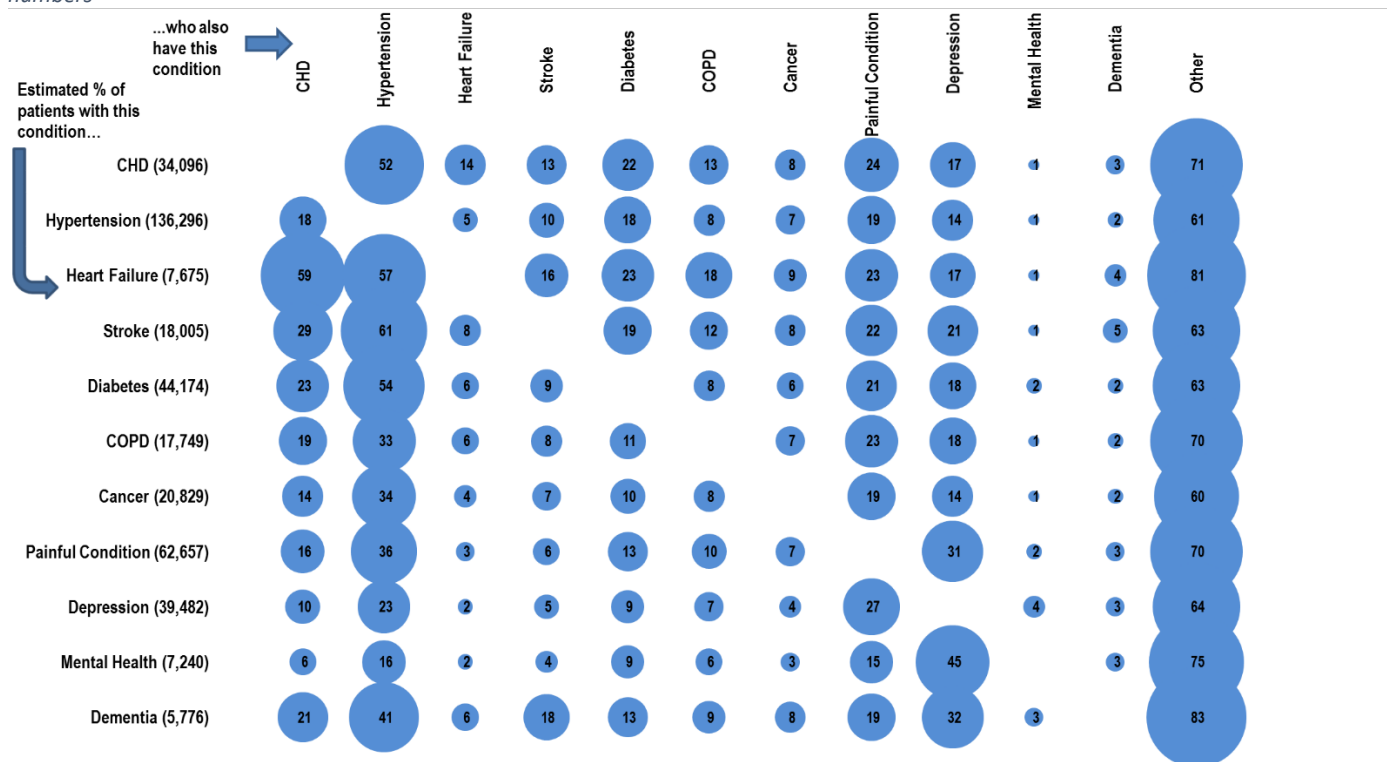


Source: Census 2011, CFAS II and ONS 2014 SNPP

Multimorbidity analysis

- The following table shows that most people with any long term conditions have multiple conditions. This analysis was taken from the Scottish School of Primary Care's Multimorbidity Research Programme analysis and applied to Norfolk.
- Estimates are based on the Quality and Outcomes framework (QOF) conditions as at 2013.

Figure 10 The Scottish School of Primary Care's Multimorbidity Research Programme analysis applied to Norfolk QOF conditions (2013) - estimated numbers

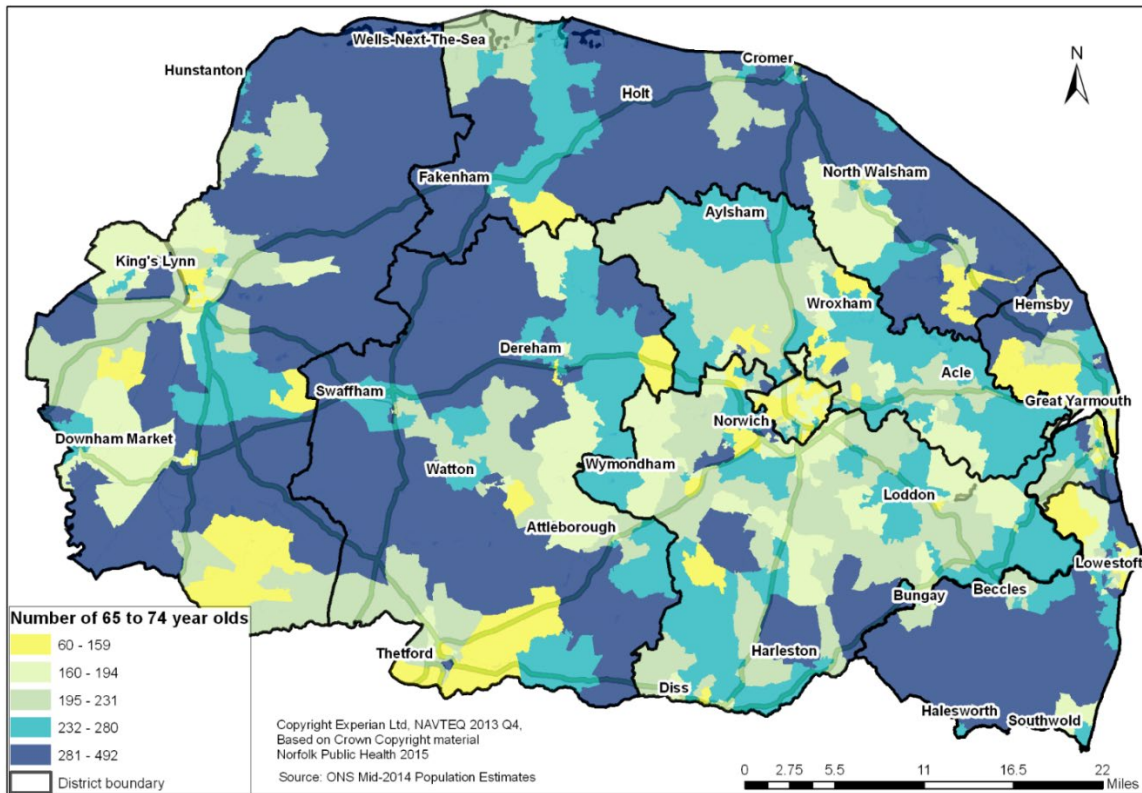


Caveats

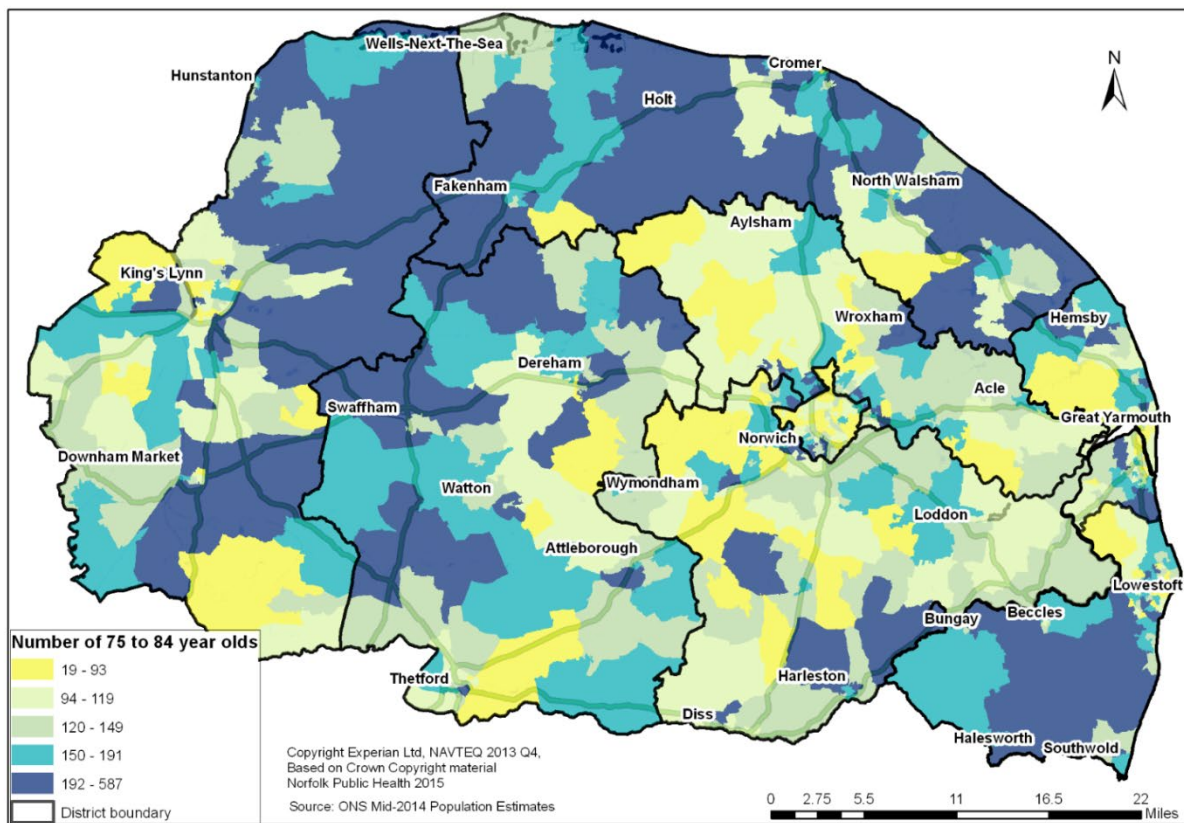
- Living longer but are people living free of disability as long – the impact of multi-morbidity?
- What do older people want?
- National strategies?
- Local strategies (health and social care commissioners) e.g. Norfolk County Council promoting independence.
- Current supply of housing – quality and quantity, how long will it last?
- Also need to consider eligibility criteria etc. and how this might influence uptake of accommodation.
- What about co-morbidity? What conditions are older people likely to experience and what do we need to be able to manage?

Appendix 1 Demographics' maps

Population 65-74 Map – ONS Mid 2014 Population estimates

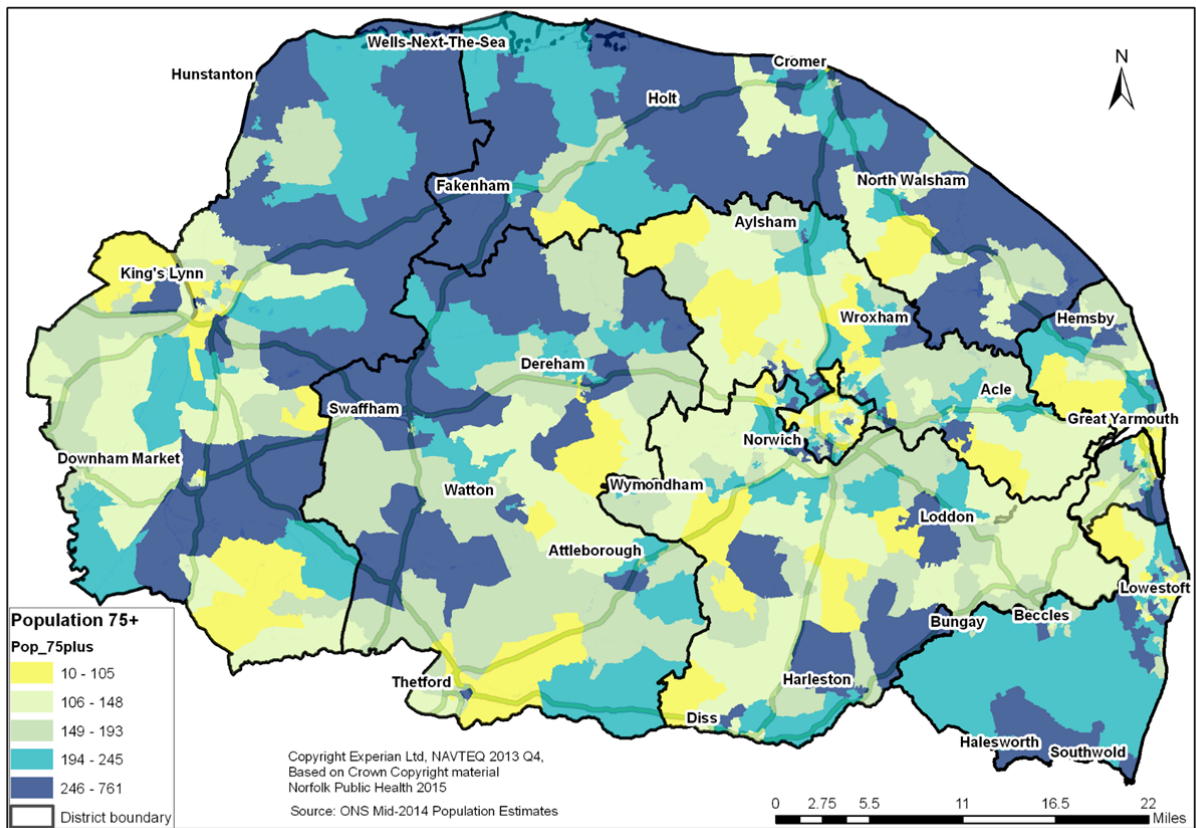


Population 75-84 Map – ONS Mid 2014 Population estimates

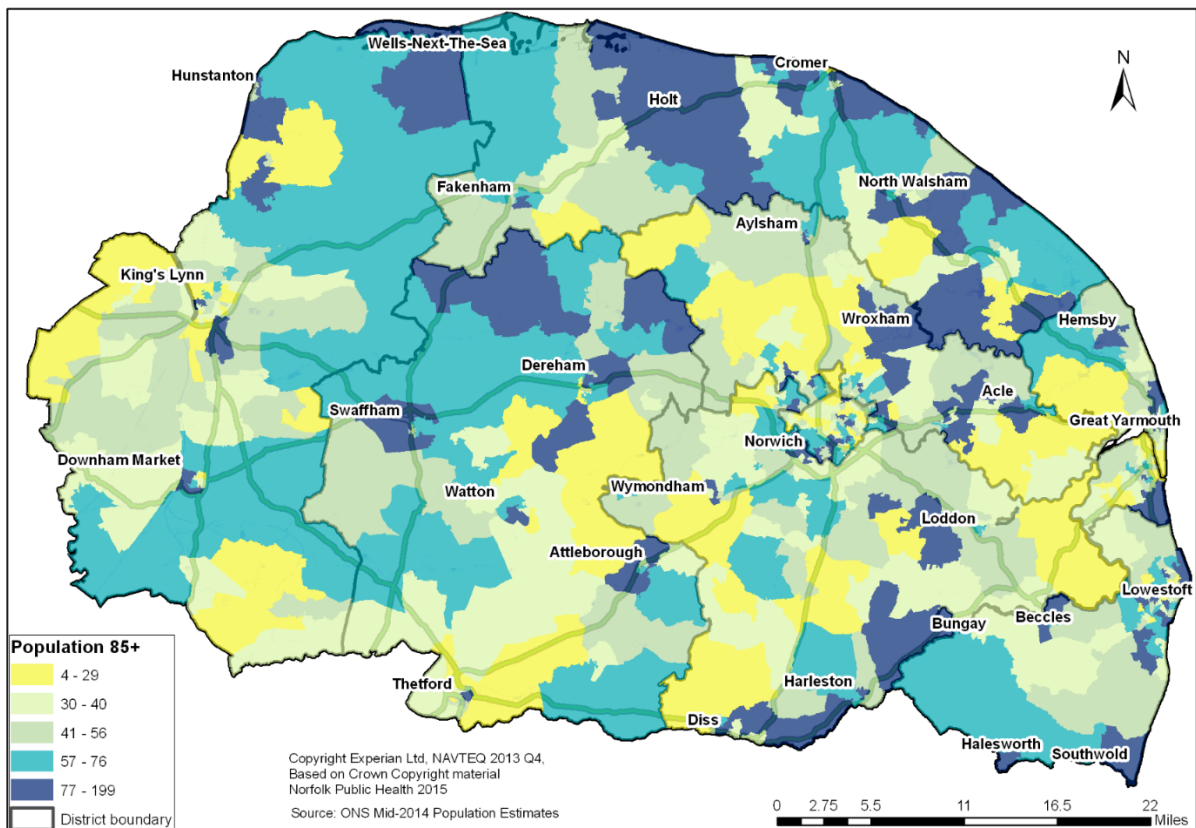


Population 75+ Map – ONS Mid 2014 Population estimates

This is the population that is used in the SHOP@ estimates

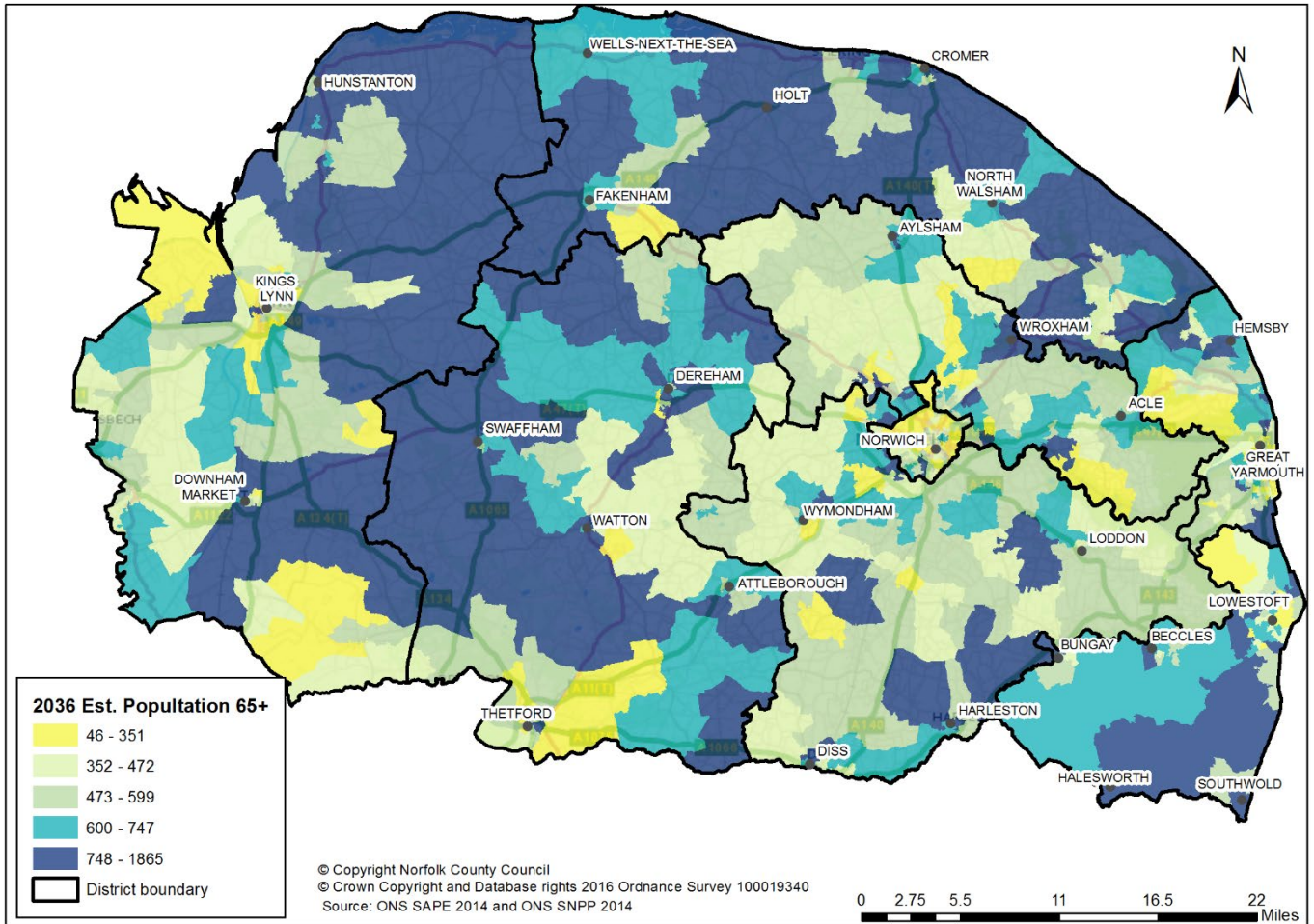


Population 85+ Map – ONS Mid 2014 Population estimates



2036 estimated population 65 and older Map

Derived by applying ONS mid-2014 district level population projections for 2036, to LSOA population estimates for 2014. This does not take into account local future housing developments.



Appendix 2 Methodology for estimated supply and need of beds in Care Homes.

Current Supply in Care Homes

The Care Homes included in this analysis correspond to all those Care Homes in the HSCIC² database as at August 2015, without a closing date, belonging to one of Norfolk's CCGs and excluding those in the district of Waveney. This gives a total of 382 Care Homes and 9,921 beds.

The Residential or Nursing status and the CCG they belong to, were also obtained from the HSCIC database.

The total number of beds for each Care Home, as well as the indicator of whether the Care Home provided Dementia beds, was obtained from the CQC³ database as at October 2014.

The number of dementia beds was allocated as per the Norfolk County Council (NCC)-Procurement Care Homes' data base as at September 2015 for those Care Homes where the number of dementia beds was recorded.

The number of dementia beds for those Care Homes where the number of dementia beds was not recorded in the NCC Procurement Care Home's data base was calculated as:

$$\text{Proportion of dementia beds in those Care Homes where the value was recorded} \\ \times \text{Number of beds in the corresponding Care Home}$$

The proportion of Dementia Beds resulted in 45% and was calculated as:

$$\frac{\text{Sum of dementia beds recorded in NC (479)}}{\text{Total number of beds in Care Homes that had Dementia beds recorded (1,603)}}$$

Estimated Need in Care Homes

The estimated need for Care Home beds was obtained by applying the corresponding Prevalence rate by Accommodation type from More Choice Greater Voice detailed in Appendix 4, to the Population Projection at district level for people aged 75+ for the year the estimated need is for:

$$\text{Prevalence rate by accomodation type} \times \text{Population Projection 75 +}$$

Estimated Dementia Need in Care Homes

The estimated number of Residential beds needed for people with dementia for a particular year was calculated as follows:

$$\frac{\text{Estimated number of people in need of a Residential bed for the Year} \times \\ \text{Number of people with dementia living in a Care Home}}{\text{Estimated number of people in need of a Residential or Nursing bed in the current year (2015)}}$$

² Health & Social Care Information Centre (HSCIC) <http://www.hscic.gov.uk/>

³ Care Quality Commission (CQC) www.cqc.org.uk

In the same way, the estimated number of Nursing beds needed for people with dementia for a particular year was calculated as:

$$\frac{\text{Estimated number of people in need of a Nursing bed for the Year} \times \text{Number of people with dementia living in a Care Home}}{\text{Estimated number of people in need of a Residential or Nursing bed in the current year (year 2015)}}$$

where:

- Estimated number of people in need of a Residential/Nursing bed = Estimated Need for Residential/Nursing for the year the calculation is for, as described in the “Estimated Need in Specialist Housing” section in this Appendix.
- Number of people with dementia living in a Care Home = The Dementia Prevalence in Care Homes from the dementia prevalence calculator available from the Primary Care Web tool⁴ as at September 2014.
- Estimated number of people in need of a Residential or Nursing bed in 2015 = Estimated number of people in need of a Residential bed in 2015 + Estimated number of people in need of a Nursing bed in 2015, calculated as described in the “Estimated Need (2015 and 2036)” section in this Appendix.

⁴ Primary Care Web tool <https://www.primarycare.nhs.uk/default.aspx>

Appendix 3 Methodology for estimated supply and need of Specialist Housing units.

Current Supply in Specialist Housing

The number of specialist housing units in Norfolk, as well as the housing type, were obtained from the Early Accommodation Counsel (EAC), data as at October 2014.

Estimated Need in Specialist Housing

The estimated need for Specialist Housing units, was obtained by applying the Prevalence Rate by Accommodation Type from More Choice Greater Voice detailed in Appendix 4, to the Population Projection⁵ at Lower Super Output Area (LSOA) level for people aged 75+ for the year the estimated need is for:

$$\text{Prevalence rate by accommodation type} \times \text{Population Projection 75 +}$$

Estimated Dementia Need in Specialist Housing

The estimated number of Specialist Housing units needed for people with dementia for a particular year was calculated as follows:

$$\frac{\text{Estimated number of Specialist Housing Units}}{\text{Housing with Care units needed for the Year}} \times \text{Housing Dementia Prevalence}$$

where:

- Estimated number of Specialist Housing units needed for the Year = Estimated number of Sheltered Housing or Housing with Care units needed for either 2015 or 2036 accordingly, calculated as described in the "Estimated Need in Specialist Housing" section in this Appendix.
- The Housing Dementia Prevalence is assumed to be 2% higher than the Community Dementia Prevalence and was calculated as follows:

$$\text{Housing Dementia Prevalence} = .02 + \text{Community Dementia Prevalence}$$

$$\text{Community Dementia Prevalence} =$$

$$\frac{\text{People in the community with dementia}}{\text{Population 65 + in the year} - \text{Number of people with dementia living in a Care Home}}$$

$$\text{People in the community with dementia} =$$

$$(\text{CFASII prevalence rate for 65 plus in Table 10} \times \text{current population 65 plus (year 2015)}) \\ - \text{Estimated number of people with dementia living in a Care Home}$$

- Estimated Number of people with dementia living in a Care Home = The Dementia Prevalence in Care Homes from the dementia prevalence calculator available from the Primary Care Web tool⁴ as at September 2014.
- Cognitive Function & Ageing Study (CFAS) II⁶ National Dementia Prevalence Rates by age band:

Table 15 CFAS II National Dementia Prevalence Rates for people age 65 and over

Age Band	Males	Females
65-69	0.012	0.018
70-74	0.030	0.025
75-79	0.052	0.062
80-84	0.106	0.095
85-89	0.128	0.181
90-95	0.171	0.350
95+	0.171	0.350

⁵ ONS Subnational Population Projections 2014

⁶ CFAS II <http://www.cfas.ac.uk/cfas-ii/>

Specialist Housing by Tenure

The current supply/need and future need by tenure was obtained by applying tenure distribution in Table 13 to the Specialist Housing units calculated as described previously in this Appendix.

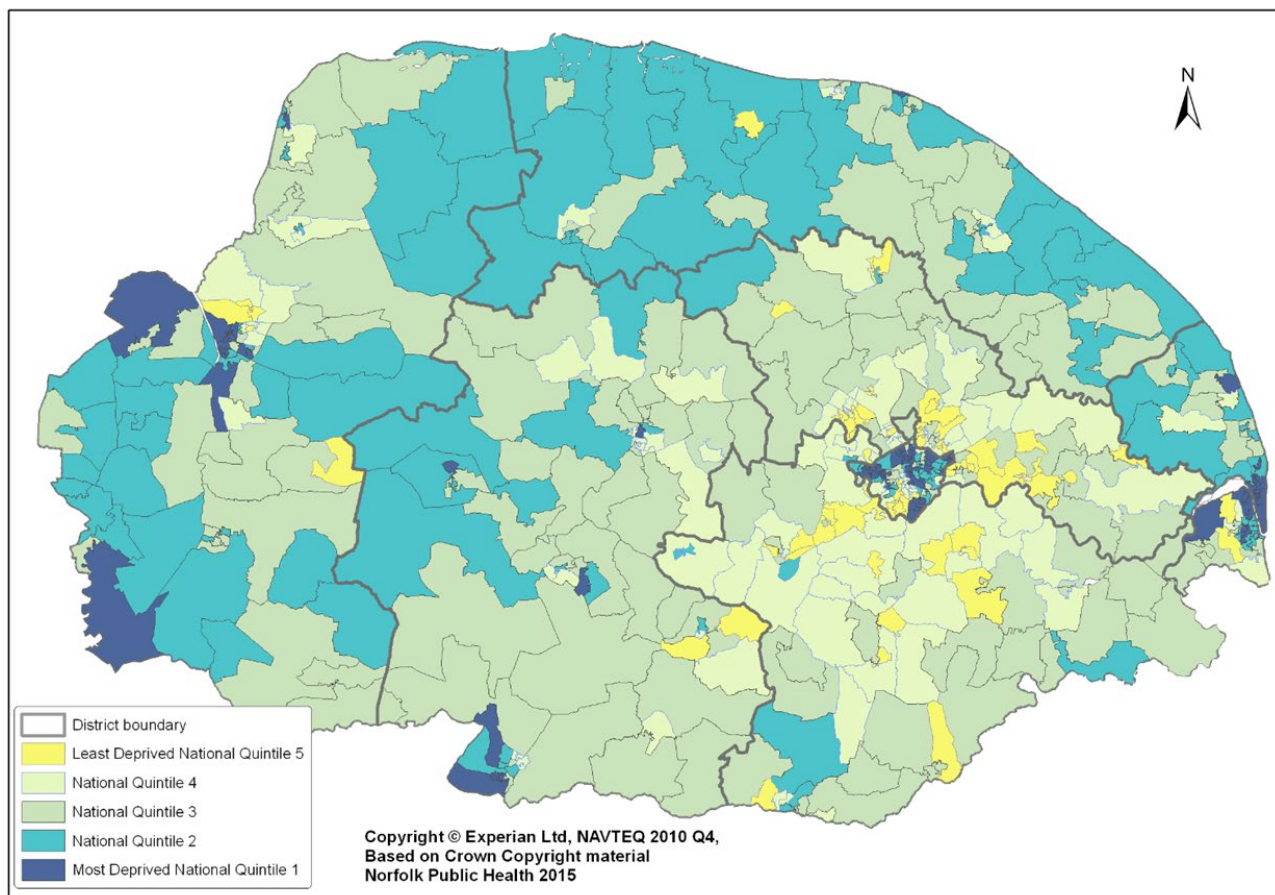
The tenure distribution is based on deprivation quintiles as per the Index of Multiple Deprivation (IMD) 2015⁷. All the calculations for housing by tenure and the deprivation quintiles below have been done at Lower Super Output Area (LSOA) level.

Table 16 Tenure distribution by deprivation quintile

IMD 2015	Population 75+	Rented	Shared Ownership	Leasehold / Ownership
Most Deprived Quintile 1	14,980	100	0	0
Quintile 2	20,745	75	25	0
Quintile 3	19,967	0	25	75
Quintile 4	20,598	0	0	100
Least Deprived Quintile 5	18,745	0	0	100

Source: Norfolk District's housing officers

Figure 11 IMD quintiles distribution at LSOA level



⁷ Norfolk County Council, The English Indices of Deprivation – A County summary, LSOA analysis and comparison of change
<http://www.norfolkinsight.org.uk/resource/view?resourceId=1250>

Appendix 4 More Choice Greater Voice prevalence

Prevalence is the number of units required per 1,000 of the population aged 75+. The prevalence for Norfolk in this analysis is pre-set with the prevalence rates from "More Choice Greater Voice"⁸ to estimate need as follows:

Table 17 More Choice Greater Voice prevalence

Accommodation Type	MCGV Initial Prevalence per 1000 75+	Prevalence per 1000 75+ applied to Norfolk
Sheltered Housing	125	125
Enhanced Sheltered Housing	20	0
Housing with care (Extra Care Housing with 24/7 support)	25	45
Total residential beds	65	65
Total nursing beds	45	45

There are some suggestions in the SHOP@⁹ tool as to how to adjust these depending on how well developed is the local authority's extra care strategy.

For example, if the local authority have an extra care housing strategy, then the suggestion is that the need for sheltered housing and residential care can be reduced and this can be reflected in overall estimates. If the current provision of extra care housing is low and the local authority have a fully developed extra care housing strategy, then it could potentially reduce the number of residential beds by 20%, but this would require the local authority to meet the extra care housing prevalence of 25 dwellings per 1,000 people aged 75 and over.

There is also some suggestion from the commissioning guidance in the SHOP@ tool that if an authority is fully committed to extra care, for example pump priming some revenue in from the preventative agenda, they will be successful and reduce residential care and placements and sheltered housing need. If extra care is funded from critical and substantial personal budgets only, it will struggle in areas of limited leasehold markets and extra care will be lower than expected with residential care remaining high.

⁸ "More Choice Greater Voice" <http://www.housinglin.org.uk/Topics/type/resource/?cid=2545>

⁹ Tool from Housing Learning and Improvement Network Strategic Housing for Older People (SHOP@) <http://www.housinglin.org.uk/Topics/browse/HousingExtraCare/ExtraCareStrategy/SHOP/SHOPAT/>