

Seniors Housing Planning Need Assessment Siddington Park, Phase II

Prepared for Rangeford

July 2024

Instruction



Purpose

Knight Frank has been instructed to prepare a needs assessment on behalf of Rangeford in relation to a planning application. The report is for a proposed seniors housing scheme at Siddington Park, Cirencester. The scheme consist of two phases totalling 180 units – the first phase of 123 units has already been delivered, the second phase of 57 units is the focus of this report.

Analysis of the population and demographics of the elderly population together with existing and future supply has been carried out in conjunction with Rangeford's proposed development.

Data Sources

We have utilised several resources on a desktop basis to establish the demand and supply landscape, and whether there is a need for the proposed development.

The following sources have been used to support this report:

- ONS Census 2021 Population statistics
- ONS 2018-based population projections
- ONS 2019 mid-year population estimates
- LaingBuisson Extra Care Housing UK Market Report
- Housing LIN
- Elderly Accommodation Counsel
- www.housingcare.co.uk
- Glenigan planning portal
- Relevant planning departments
- Cotswold District Council
- Cotswold District Local Plan 2011 – 2031 (Adopted September 2018)
- Review of the Cotswolds District Local Pan 2011 – 2031 – Housing Requirement (August 2023)
- Cirencester Town Council Planning Statement (November 2015)

- Cotswolds District Council Local Plan Response to Reg 18– Development Strategy and Site Allocation January 2015
- Gloucestershire – Local Housing Needs Assessment 2019 (September 2020)
- Cotswolds District Council – Housing Implementation Strategy (June 2017)

Timing

The planning research has been carried out between 03/07/2024 and 17/07/2024. Any planning applications submitted after 17/07/2024 have not been researched.

Instruction Summary	
Client	Rangeford
Site Address	Siddington Park, Cirencester, Gloucestershire, GL7 6GU
Purpose of advice	Planning Needs Assessment
Date of engagement	July 2024
Prepared by	Sam Heffron – Senior Research Analyst, Seniors Housing
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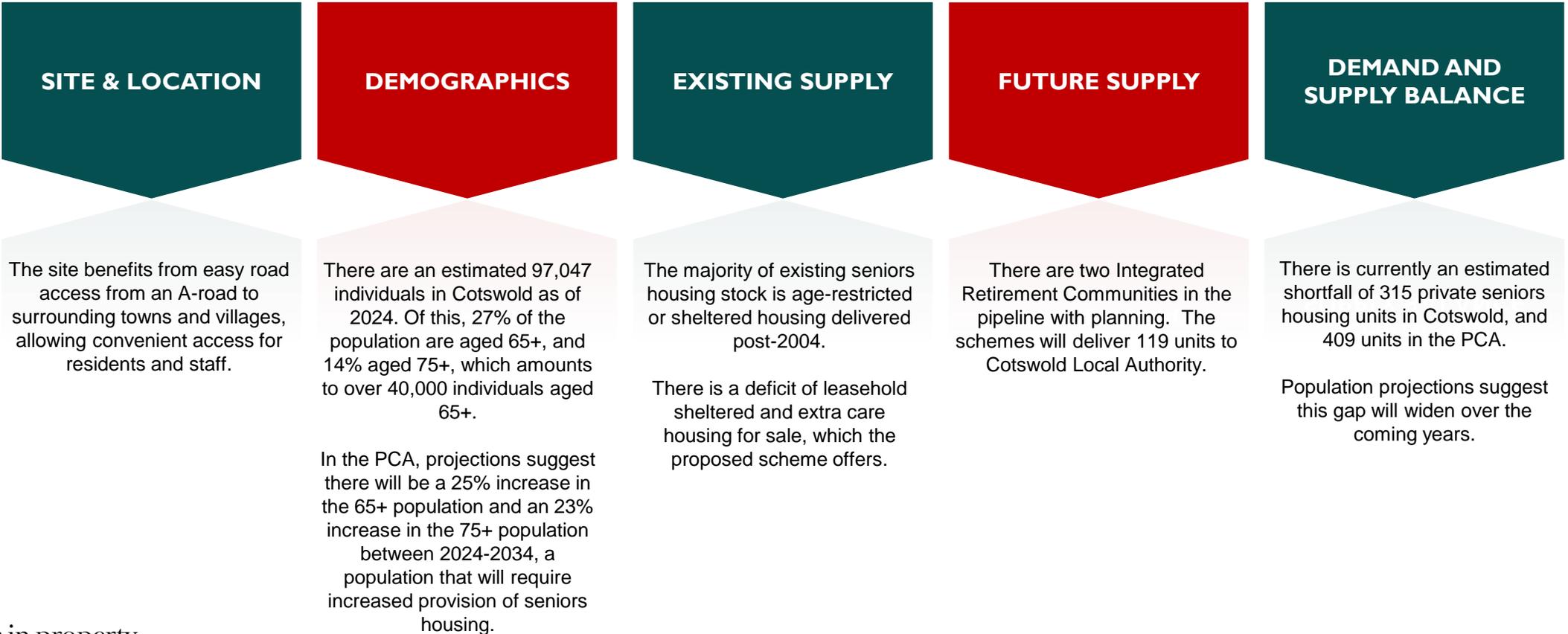
1. Executive summary

Executive summary



We have reviewed the demand and supply position of the proposed site and are able to comment on the general provision of seniors housing within the Cotswold local authority. Our analysis shows there is a significant shortfall in the number of seniors housing units within the Cotswold local authority. Furthermore, content from Cotswold District Local Plan 2011 – 2031 documents also recognises a need to increase the provision of seniors housing. Population projections provided by the ONS estimate there will be significant growth in the 65+ and 75+ population which will further strengthen the argument for increased provision of specialised housing for the elderly.

Our view of Cotswold local authority is provided using the following key categories:



2. Market Context

2a. Seniors housing market



Housing for the elderly population has traditionally focused around either remaining in the family home, or moving into a residential care home. Seniors housing provides an alternative option.

Seniors housing provides purpose-built specialist property for seniors. This accommodation, also referred to as senior living or retirement living, encompasses a broad range of housing options and caters for seniors who require specialist housing but who want to remain independent and benefit from the availability of on-site services and care. The sector sits in a space between general housing and care homes. There are different models which deliver increasing levels of services, including care. In the market, a wide range of terminology is used but we outline the main terms below:

Within this report we will refer to the full market as **Seniors Housing**, which is split into two parts – **Retirement Housing** and **Integrated Retirement Communities (IRC)**. We will refer to the development and the analysis as IRC throughout the report, only using Extra Care terminology for the independent needs assessment.

Retirement housing - also known as retirement living, independent living, age restricted housing or sheltered housing:

Covers seniors who are typically selling or leaving their former family home and moving to flats or cottages designed for people in later life. The accommodation options are varied and are provided by both the government and affordable sectors, as well as private operators such as Rangeford. The apartments will typically have Use Class C3 planning unless they form part of a larger development linked with care. The extent of communal facilities varies by scheme and operator.

Integrated Retirement Communities (IRC) - also known as Extra Care, Assisted Living, and Housing with Care:

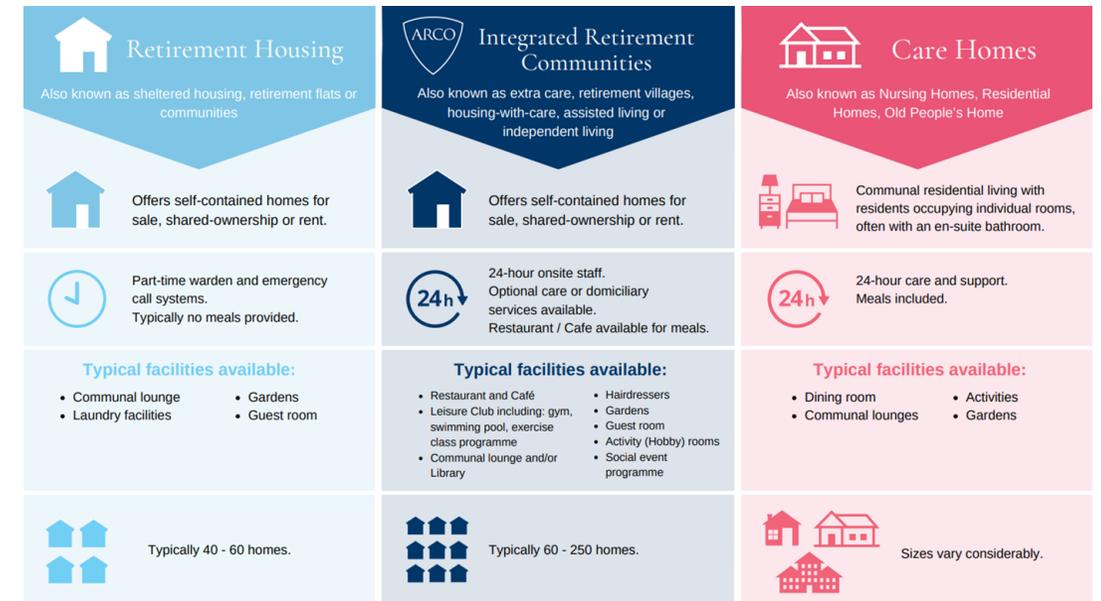
ARCO have adopted the term 'Integrated Retirement Communities' for this part of the sector. Represented by operators such as Rangeford and Audley Villages, IRCs can be defined as combining high quality housing options for older people with tailored support

services. The term was adopted after years of research and engagement with older people who suggested a need for a universal term to increase clarity. They allow residents to rent or own a property and to maintain their privacy and independence, with the reassurance of 24-hour on-site staff, communal facilities, and optional care and support as needed.

Typically, occupiers live by themselves and do not require constant care. Residents can purchase domiciliary care on a flexible basis when required. There is an emphasis on residents having independent lifestyles; the cost of care depends on the amount of care required by the individual. Support is available 24/7 (but personal care is not necessarily provided through the night); domestic support is provided if required; communal / shared facilities are available to all. The accommodation allows individuals to "age in place". Levels of acuity may increase to the point where the resident has to move to a care home.

Close care: This is residential accommodation linked to a care or nursing home. Residents are able to use the facilities in the care home.

Figure 1: ARCO definition of Seniors Housing market



2b. Integrated Retirement Communities

We have been advised that the subject scheme is proposed as an Integrated Retirement Community Scheme (IRC). We have not been provided with full details of the offering at this early stage but understand the proposed scheme will cater to residents with varying levels of care need whilst providing an independent lifestyle.

Integrated Retirement Communities (also known as assisted living, housing with care or Extra Care) are a form of specialist housing providing self-contained residential apartments and cottages. Residents have access to on-site facilities and services, including domiciliary care.

The apartments are the residents' home and this type of property is distinct from residential care homes and nursing homes.

Whilst planning permissions are often restricted to 55 / 65 years+, we would normally expect residents moving into Housing with Care retirement communities to be 75 years +. However, there are a considerable number of those aged 65-74 living in IRC schemes throughout the country.

Domiciliary care is available 24/7 on site, with residents purchasing as much as they require on a flexible basis.

These developments provide communal facilities, although the exact provision varies. Facilities include, but are not limited to, a restaurant, private dining room, a gym, swimming pool, a resident's lounge, hair salon, library, activities room and guest accommodation for visitors.

Normally operators aim to support residents to "age in place" and thereby provide an alternative to a care home.

Residents with high levels of acuity or specialist health care requirements may have to move on to care homes.

Integrated Retirement Communities are often within planning Use Class C2 however some schemes are delivered under C3 consent.

The private sector has been increasingly active in the housing with care sector in recent years, with institutional money starting to invest.

Integrated Retirement Communities with communal facilities and services create operational real estate assets which require on-going management.

Revenue is generated through the initial sale of the units, but the model should also provide for the on-going management of the property. This includes property maintenance, the provision of hospitality and care services, lifecycle costs, head office costs, estate agency and other staffing.

Most of the private IRC industry is dominated by sales on a leasehold basis; although there is increasing interest in rental.

We expect leaseholds to be for a minimum of 125 years with residents paying a service charge and typically an event fee (also known as a Deferred Management Fee).

Active operators include Retirement Villages Group (RVG), Rangeford , Audley Villages, Richmond Villages, Inspired Villages, and River, among others.

Integrated Retirement Community offering:

- Care
- Hospitality and communal facilities
- Wellbeing and lifestyle
- Independence and choice

2c. Benefits of Seniors Housing

The provision and effective delivery of seniors housing into a community can bring a plethora of social, economic, health and environmental benefits.

Economy:

- The scheme will create a number of construction and operational jobs, both directly and indirectly. Short-term, there will be a need for construction workers to be on-site during the build, with Rangeford (2021) suggesting that for a 45 unit development a local authority could expect to see the benefits of 85 construction jobs for the duration of the build.
- A number of operational jobs will also be created by the proposed scheme. We understand that the flats will be supported by the care home. There will be a requirement for permanent full-time and part-time care and ancillary staff within the scheme. This includes, but is not necessarily limited to: healthcare workers, including nurses and carers; hospitality workers; chefs and waiters; maintenance and security workers; and leisure and wellbeing staff. Most of these staff will travel from within a 30 minute drive time of the site. The provision of these jobs will therefore provide wider benefits to the local economy, attracting economically active workers, and therefore increasing expenditure within the local area.
- In addition to staffing, schemes will generate additional council tax revenue and revenue will be generated through stamp duty payments.
- Schemes can also be good for local businesses. Rangeford (2021) found that, on average, residents of retirement communities spent 63% of their annual expenditure in local shops providing a further boost to the local economy.
- Gross Value Added (GVA) measures the contribution of economic activity to an economy, and can be used as an indicator of wealth. The proposed scheme will generate an additional GVA per annum for the local economy.
- Schemes can also be good for local businesses to support its daily operations. Examples include: gardening services, food supplies, bedding supplies, toiletry supplies, DIY and maintenance.

Housing:

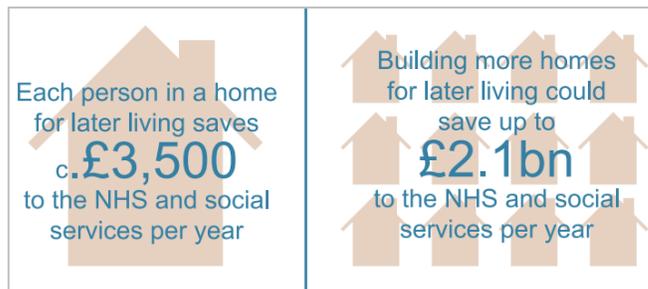
- The introduction of seniors housing would allow the release of family housing back into the market. We assume that a large proportion of demand for this scheme would be localized, therefore this would mean an immediate positive impact for the local area and wider local authority. This release of stock will not only be beneficial for housing provision targets but could attract more economically active residents into the area and further increase household expenditure.
- A recent report from the Centre for Ageing Better (Locked Out A New Perspective on Older People's Housing Choices, Aug 2023) suggests that more than 4 million senior property owners could be willing to downsize, given the right opportunity. Not only do schemes like this enable retirees' access to the benefits of retirement living but they also help to release large volumes of homes back into local residential markets for younger, prospective buyers. High quality senior living schemes are therefore arguably catalysts for re distributing UK housing wealth.

2c. Benefits of Seniors Housing

Residents:

- For the residents themselves, peace of mind is the key benefit, with their health needs, safety, security and wellbeing needs addressed by the operator. Seniors housing can tackle loneliness and isolation, providing an independent lifestyle in high quality housing within a community setting.
- Residents' emotional needs can be supported and enhanced by an Housing with Care operator.
- Research by Holland et al (ExtraCare Charitable Trust; Integrated Homes, Care and Support: Measurable Outcomes for Healthy Ageing, 2019) found that anxiety levels fell amongst residents within the first eighteen months of occupation in an Housing with Care scheme.
- Holland et al also noted greater memory retention, up to 24% improvement, and delayed frailty progression amongst Housing with Care scheme residents in contrast to the wider elderly population.
- A study that took place at Whiteley Village, an Housing with Care facility in Surrey, analysed 100 years of data records to suggest that life expectancy for females residing in their Housing with Care facility was, on average, five years greater than their counterparts in the general population.
- The study attributed the growth in life expectancy to reduced levels of isolation and the benefits of the care provision available. This research exemplifies the ability for seniors housing schemes to not only enrich residents' retirement lifestyles, but also improve their longevity.

Figure 2: Potential Savings to NHS



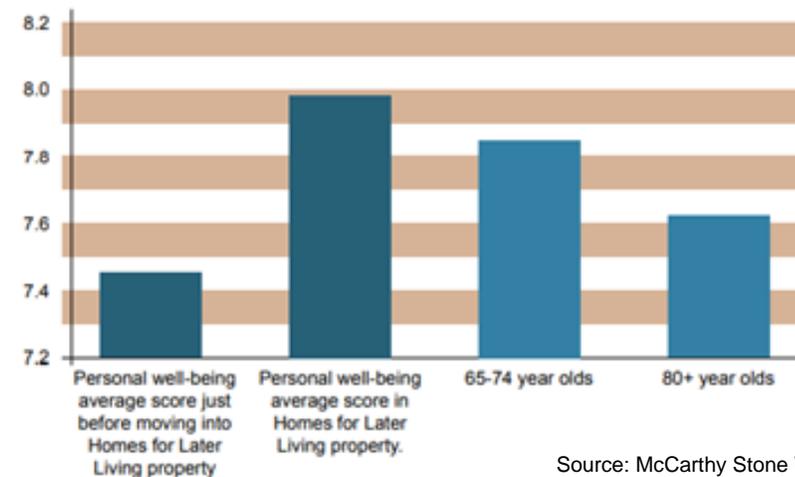
Source: McCarthy Stone WPI Reports

Your partners in property

Environmental:

- Housing with care schemes also have the potential to benefit the environment.
- Younger families usually complete energy efficient renovations to family homes once in ownership of seniors.
- Housing with Care schemes often provide a car or shuttle service if they are not located in central areas. This has the benefit of reduced car usage and greater reliance on public transport. One Housing with Care development has the potential to take up to 15 cars off the road. Some schemes also include car clubs which encourages vehicle sharing.
- Some 97% of schemes are constructed on brownfield sites (Rangeford , 2020).
- New schemes equally tend to encompass eco-friendly fit outs, including smart appliances and high-quality insulation.

Figure 3: Average personal well-being scores for Homes for Later Living residents compared with national population



Source: McCarthy Stone WPI Reports

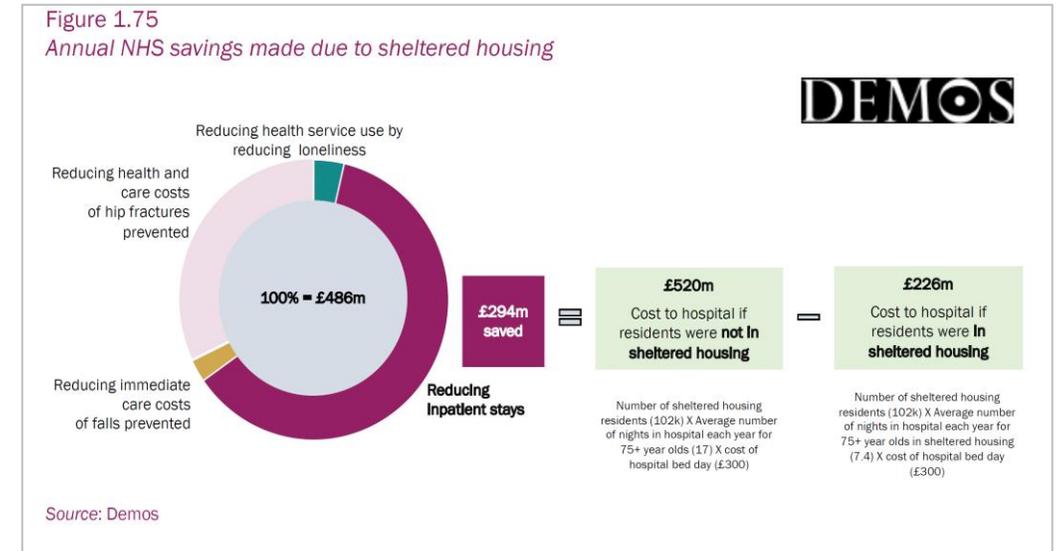
2c. Benefits of Seniors Housing



Healthcare and the NHS:

- The development will offer in-house care and services for an increasing elderly population. If delivered effectively, this will reduce pressure on social care and NHS services, leading to savings in the public sector. This could translate to a reduction in the number of community nurse visits, GP visits and will have a knock-on impact on ambulance call-outs and potentially the number of hospital admissions and reducing the length of stay.
- For example, despite housing with care residents typically having more complex health needs research from Rangeford suggests their residents have 0.66 fewer visits to GP surgeries per year in comparison to the general elderly population.
- Housing with Care schemes can also assist in reducing bed blocking at hospitals. When residents are admitted to a hospital their discharge procedure is faster when compared with elderly residents that may need to arrange domiciliary care within their homes.
- Research by Aston University further established that housing with care residents' unplanned hospital stays were limited to an average of 1-2 days in contrast to 8-14 day average stays for seniors in general private housing.
- An Housing with Care scheme can ensure that residents recover faster within their "everyday" environment where they can engage in activities specifically designed for them. The social aspect with dedicated carers and other residents can also assist with mental recovery, further reducing the overall burden on the NHS.
- Demos have produced research on the annual NHS savings made due to specialised seniors housing, which is shown in the graphic on the right. Housing LIN explain that the adapted facilities present in such schemes reduce the risk of falls and therefore hip fractures and other injuries that would require medical attention.
- As a result of the amalgamation of fewer GP visits, fewer community health nurse visits, fewer non-elective admissions to hospital and reduced durations of stay and less ambulance call-outs Housing LIN estimate a saving of £1,976.44 per resident per annum (2019)
- This, in itself, is a benefit arising from seniors housing schemes, particularly as the scale and efficiency of many new developments progresses.

Figure 4: Annual NHS savings made due to sheltered housing



Source: Demos

Figure 5: Reduction in care staff associated with Integrated Retirement Communities



Source: ARCO (2021)

2d. Market drivers



Demographics

The demographics underpinning the seniors housing market can be summed up concisely: the population is set to rise in the coming years, but the number of older people will increase much more rapidly as people live longer. The rapidly expanding cohort of individuals aged 75+ will trigger an increase in the proportion of the population requiring specialist seniors housing.

The UK's population is ageing. There are 11.2 million people aged 65+ at present which is set to increase by 21% in the next 10 years, at which point 1 in 4 people will be aged 65+. In the same 10-year period the number of people aged 80+ will increase by 33%.

By 2034 the number of people aged 75+ living in the UK is projected to increase by 19% to more than 6.7 million. By 2043, it is projected that 13% of the population will be aged 75+, an increase of almost 45% from today.

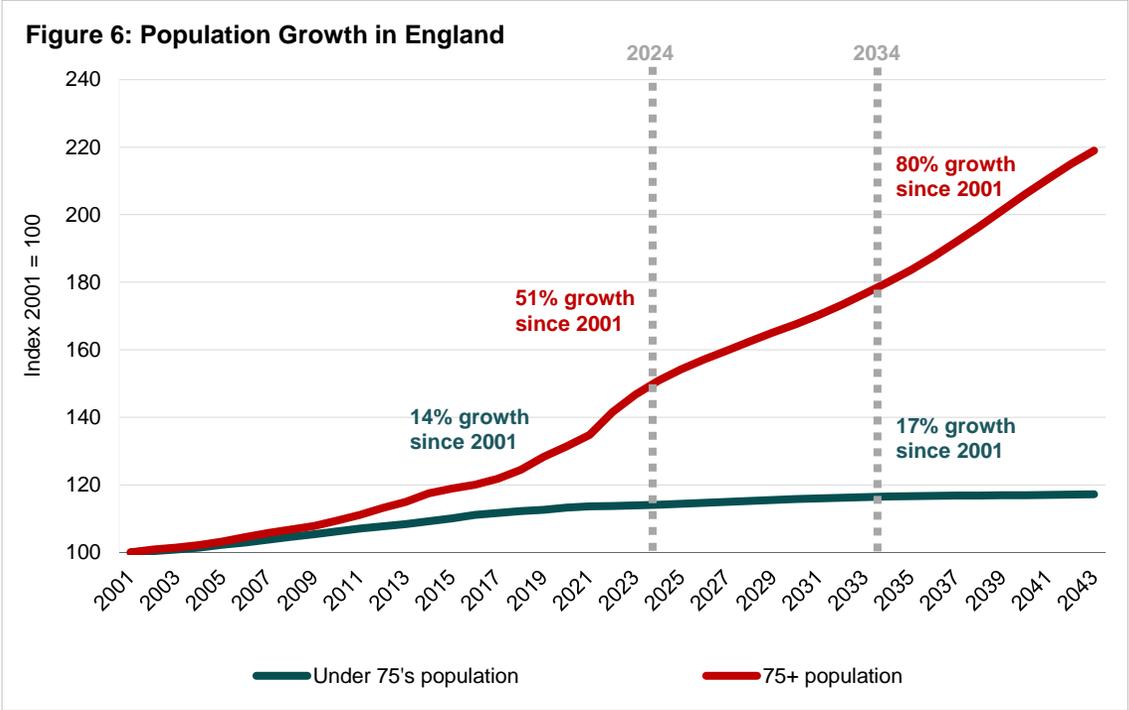
An older population requires increased levels of care and support data from the English Longitudinal Study of Ageing 2018-19 shows that 15.5% of individuals aged between 65-74 experience difficulty with one or more daily activities, while 44% for those aged 85 and above require some level of care and support for daily activities

65+ and 75+ Population growth in England

The number of over 75s has increased 28% from 4.3m in 2014 to 5.6m in 2024. Over the same period, the 65+ population has increased 18% from 9.5m to 11.2m. The total 65+ population will rise to 13.6m by 2034 and 14.7m by 2043.

The total projected population in 2024 is 57,816,890 which is expected to increase by 4% to 59,988,992 in 2034 and a further 3% to 61,744,098 in 2043.

Between 2001 and 2024 there has been a recorded growth of 43% in the 65+ population, compared to 17% growth in the overall population. By 2043, the projected population of 65+ seniors will be 88% higher than in 2001 compared to 25% for the total population.



2d. Market drivers



Existing supply and undersupply

There is a substantial imbalance between the rate our population is ageing and the delivery of seniors housing.

As of 2024, there were just over 785,000 existing seniors housing units in the UK, with c.200,000 of these units either private for-sale or rental.

There are approximately 4,000 existing Seniors Housing private rental units in the UK, with 88% of these pepper-potted in for-sale schemes, and the remaining 12% delivered as purpose built rental schemes.

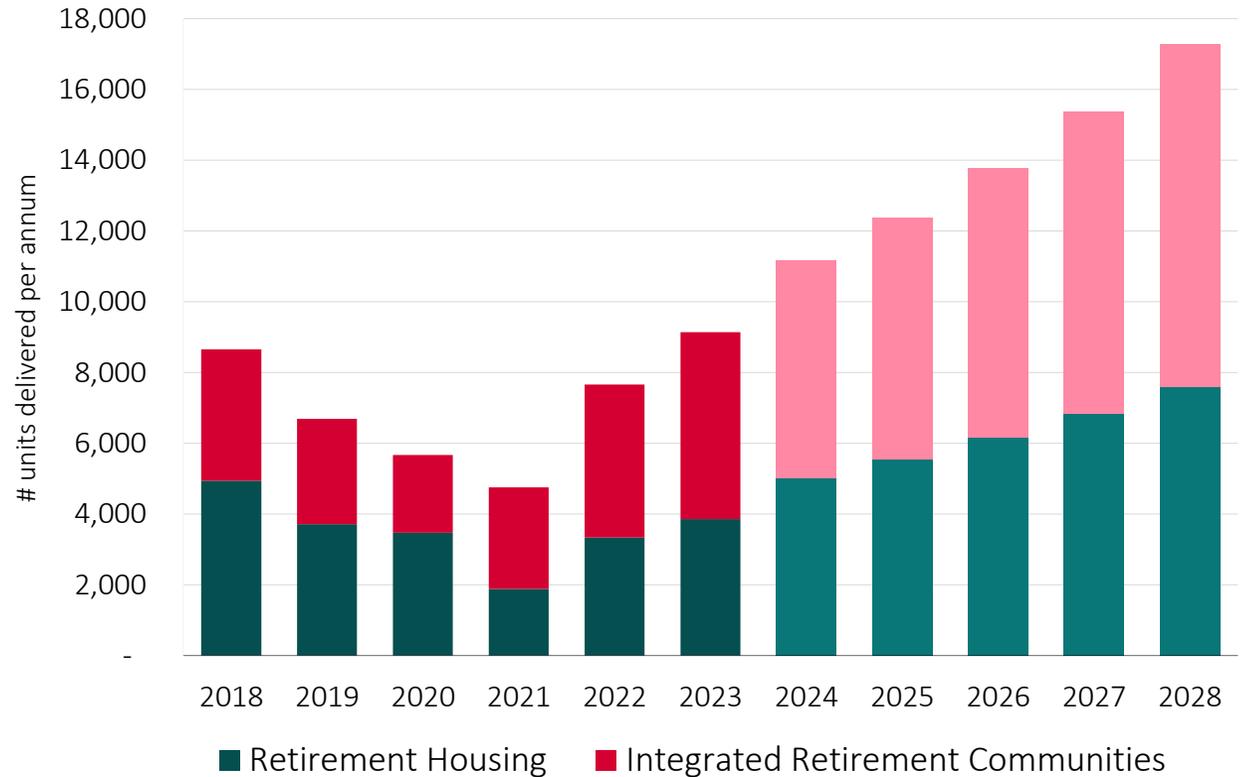
Given the growth of investment in seniors housing in recent years, an increase in delivery of seniors housing units is widely expected. We have analysed the future plans of all major operators against past delivery to forecast a 27% increase to the current stock of private seniors housing units by the end of 2025.

Our projection outlines the delivery of almost 42,000 private for-sale units and 7,500 private rental units between 2021-2025.

Of these units, we project the delivery of 21,000 private housing with care units for sale and almost 4,000 for rent.

Despite the predicted growth in the market, it is still evident that there is an undersupply of specialist housing for seniors in the UK.

Figure 7: Annual Delivery of Seniors Housing units in the UK



Source: Knight Frank Research, EAC, Planning portals

3. Proposed Scheme

3a. Proposed scheme

The proposed scheme is located on the southern outskirts of Cirencester town centre. We understand that proposed scheme is Phase 2 of the wider high-end Integrated Retirement Community (IRC), Siddington Park operated by Rangeford Villages.

We understand that Phase 1 of this IRC has achieved practical completion and due to launch on 2nd July 2024. Phase 1 covers a site of circa 8.4 acres and provides 123 one-,two- and three- bed apartments across 13 blocks and a central pavilion. We understand that the communal areas are situated in the central pavilion and include a coffee lounge, owner’s lounge/cinema, bar, bistro, private dining, outdoor terrace, treatment room, gym, hydro pool, swimming pool, sauna, steam room, yoga/dance study and an activities room.

We have been advised that the proposed scheme is the development of Phase 2 and will cover a site of circa 3.2 acres. We understand that currently the site is being used for site compound and associated car parking. However, we have been advised that the plans for Phase 2 are to include 57 additional units comprising one-, two- and three- bed apartments and two-bed bungalows across 6 new build accommodation blocks. We understand that the units developed within Phase 2 will have access to the Phase 1 central pavilion and the amenities situated there.

Figure 8: Location of Proposed Scheme

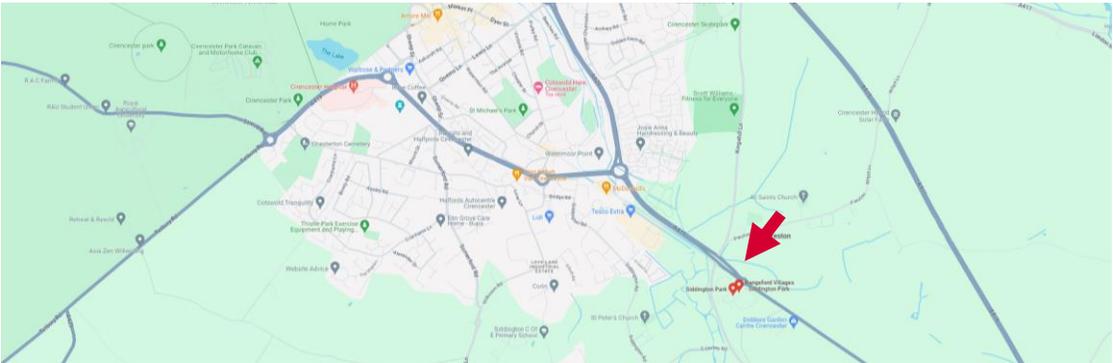


Figure 9: Existing Site Plan



3b. Proposed site and situation



The proposed site is located on the southern outskirts of Cirencester, on the A419, the connecting road between Cirencester and Swindon.

The town centre of Cirencester is circa 1.5 miles north of the proposed site. The town provides a plethora of amenities including shops, restaurants, cafes, doctors' surgery, places of worship and a library. We also understand that there are other amenities within 0.5 miles of the site which include a supermarket, petrol station, garden centre and fast-food outlets.

The nearest railway station is Kemble which is circa 6 miles southeast from the Subject Site with services on the Cheltenham-Swindon-London train line. The nearest bust station is located 0.5 miles southeast of the Subject Site, however there is also a bus station 0.9 miles from the Subject Site which provides greater routes around Gloucestershire.

The distance from key amenities including public transport and GP surgeries is in line with several operational seniors housing schemes.

The site's location on the outskirts of the town of Cirencester provides residents with an abundance of easily accessible green spaces.

Planning Constraints

We have looked at various planning and environmental constraints that may cause issues when seeking to undertake development at this location.

Flooding: The site is located within flood zone 1. This indicates there is a very small chance of flooding, less than 1 in a 100.

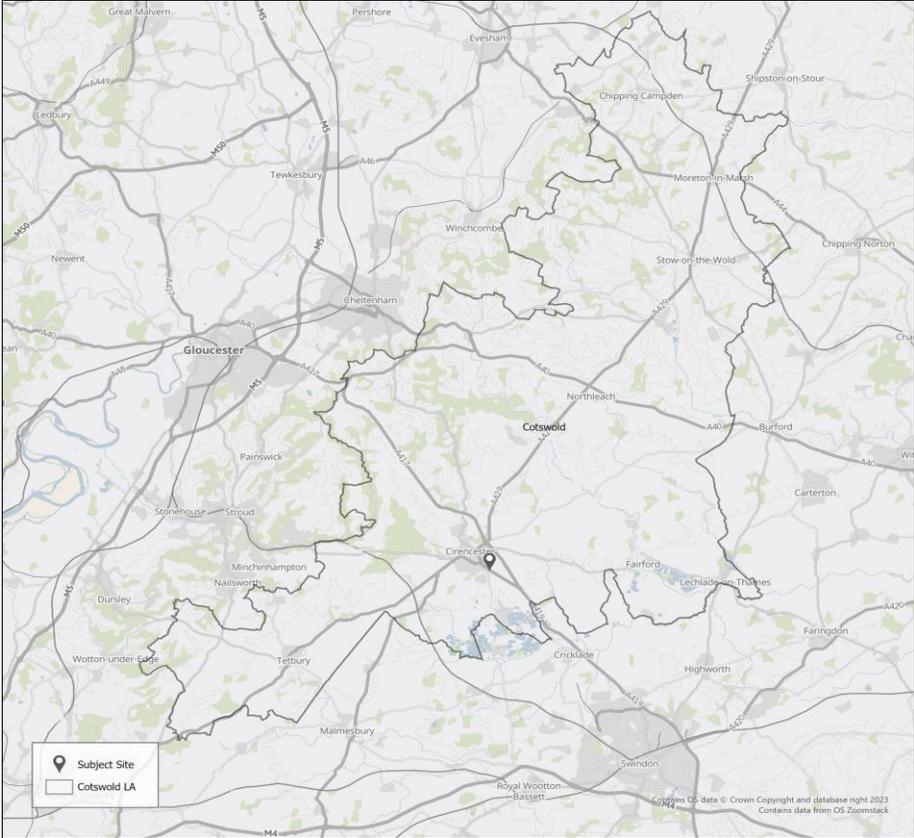
Conservation Areas: The property is not located within a conservation area.

Listed Buildings: There are no listed buildings in the vicinity of the site.

Green Belt: The property is not situated within a green belt.

For this exercise, we have identified the primary catchment area (PCA) as the Cotswold District Council (referred to in this report as Cotswold in the interest of brevity). This is used on the basis that moving into specialist seniors housing is a locally focussed market, with new residents being typically drawn from the local area or because the individuals has a connection with the area; for example, seniors moving to be closer to family members. As a benchmark, we typically assume 50% of the residents will be drawn from Cirencester and other nearby towns, although in practice the proportion will vary across different schemes.

Figure 10: Area of Assessment Cotswold Local Authority



3b. Local plans and literature review

We have undertaken a review of relevant housing documents and local plans to understand strategy around the need and provision of seniors housing. The current planning policies are based on the Cotswold District Local Plan 2011 adopted 3rd August 2018, which guides the district's development. The following documents have been reviewed:

- Cotswolds District Local Plan 2011 – 2031 (Adopted 3rd August 2018)
- Review of the Cotswolds District Local Plan 2011 – 2031 – Housing Requirement (August 2023)
- Cirencester Town Council Planning Statement (November 2015)
- Cotswolds District Council Local Plan Response to Reg 18– Development Strategy and Site Allocation January 2015
- Gloucestershire – Local Housing Needs Assessment 2019 (September 2020)

Cotswolds District Local Plan 2011 – 2031 (Adopted 3rd August 2018)

The aim of the Cotswold District Local Plan is to set out policies and proposals to meet the challenges facing the area over the period of 2011 to 2031. In regard to Cirencester, the local plan sets out that Cirencester will continue to be the focus for additional housing due to being identified as the most sustainable location to deliver future growth.

It is noted within the local plan that there is a relatively large and growing elderly population which places demand on health and public services, therefore more adaptable accommodation is likely to be required. The SHMA Update (April 2016) shows that there is a requirement for 665 sheltered and extra care housing units between 2017 and 2031 and a requirement for 580 nursing and residential bed spaces between 2017 and 2031.

Policy H4 (Specialist Accommodation for Older People) ensures that development of this accommodation type should ensure that they are designed to meet the requirement of the residents, be in easy access to public transport and amenities and provide a level of affordable housing.

Review of the Cotswolds District Local Plan 2011 – 2031 - Housing Requirement (August 2023)

A review of the housing requirement has been undertaken and highlighted that Policy H1 of the Local Plan includes increasing the requirement for bungalows as it will enable older people to downsize and free up larger accommodation for family housing.

It also highlighted that the Local Plan policy H4 identifies a need for 580 nursing and residential bed spaces between 2017 and 2031, however this was based on the calculation of the Strategic Housing for Older People Analysis tool in 2017 and does not provide the full C2 housing need of Local Plan period. Therefore, the overall need for dwellings will increase over the 20-year plan period.

Cotswolds District Council – Housing Implementation Strategy (June 2017)

The Council's Strategic Housing Market Assessment (SHMA) highlights a need for affordable housing and specialist accommodation for older people within the district. Through addressing the District's full objectively assessed housing need, one of the Council's Strategic Objectives is to 'provide an adequate supply of quality housing, of appropriate types and tenures'. Policies H1 to H5 of the Local Plan highlights the range of housing that will be delivered, including a suitable mix of housing types and tenures to meet local needs and providing a range of affordable housing and specialist accommodation for older people.

Cotswolds District Council Local Plan Response to Reg 18– Development Strategy and Site Allocation January 2015

The Reg. 18 document and supporting evidence highlights the aging profile of Cirencester's population and how this demographic trend must be actively planned for. It highlights the need for the following:

- New housing should be provided for the aging and elderly that is designed for their changing needs with features such as wider doorways, warmth, light, ground floor accommodation, near to bus routes.

3b. Local plans and literature review



- Special care facilities will be required to manage dementia, end-of-life care, access to healthcare.
- Development principles should specifically address the needs of the elderly such as provision of bus stops, community transport (including drop of places in town and at other destinations) and overcoming loneliness by providing community activities for the elderly.

Cirencester Town Council Planning Statement (November 2015)

This planning statement provides an evidence base and reference point for the future vision for Cirencester, working collaboratively with Cotswold District Council to ensure that issues facing the town and community are identified and appropriately reflected in planning policy through the Local Plan.

The planning statement draws on Cirencester’s aging population, noting that many homes are not suitable for in-home care to be delivered effectively. It highlights that housing development needs to provide sufficient flexible accommodation for elderly, young disabled and those with families.

The report states that new residential developments should take the changing needs of the population into account in terms of:

- *Flexible residential properties that can be easily modified to accommodate the changing needs of residents*
- *Purpose-built residential units for older people should be located near to shops, services and healthcare*
- *Access to public transport such as buses, and semi-public modes of transport including taxis and mini-buses, should be designed into the street pattern of new development or modifications to existing roadways, to create drop-off and pick-up points that are convenient for people with mobility and sight impairment.*
- *Facilitating the well-being of older people by providing opportunities to be physically and socially active at a pace that is comfortable to them.*

Gloucestershire – Local Housing Needs Assessment 2019 (September 2020)

This document shows that overall, for Gloucestershire, the growth in the older population represents over 90% of the overall population growth; 63,368 persons from a total growth of 69,372 persons are projected to be aged 65 or over, including an increase of 20,218 persons aged 85 or over. This is particularly important when establishing the types of housing required and the need for housing specifically for older people.

Figure 25: Total projected households in Gloucestershire for 2021 and 2041 and summary of 20-year change by age of household representative (Note: Figures may not sum due to rounding)

	Age of Household Representative								TOTAL
	15-24	25-34	35-44	45-54	55-64	65-74	75-84	85+	
TOTAL HOUSEHOLDS									
2021	6,300	29,300	41,300	53,200	53,700	43,700	35,000	14,300	276,900
2041	9,600	35,300	43,200	54,000	52,400	54,200	57,600	30,400	336,700
TOTAL CHANGE 2021-2041	+3,300	+6,000	+1,900	+900	-1,400	+10,500	+22,600	+16,100	+59,800

The report summarises that single person households represent a quarter of the overall household growth in Gloucestershire with an increase of 15,200 households over the 20-year period (2021 to 2041), including 13,850 extra single person households aged 75 and over and 5,150 aged 85 and over.

The table below identifies the potential requirement for new specialist housing, taking account of current population and existing stock together with the additional demand for the period 2021 to 2041 based on the projected change in population aged 75+:

Figure 73: Modelled Demand for Older Person Housing in Gloucestershire based on Housing LIN Toolkit and GCC Modelling

		Rate per 1,000 persons aged 75+	Gross need 2021	Existing supply	Backlog at start of period	Gross need 2041	New need 2021-41	Overall need
Sheltered Housing	Owned	120	8,176	2,811	5,365	14,444	6,268	11,633
	Rented	60	4,088	4,332	-244	7,222	3,134	2,890
Extra Care	Owned	10	677	533	144	1,199	521	666
	Rented	5	339	374	-35	600	261	225
TOTAL		195	13,280	8,050	5,230	23,465	10,184	15,414

3b. Local plans and literature review

The GCC modelling shows no extra care backlog at the start of the period and no requirement for additional extra care in some LPAs due to the number of voids identified. At the same time, the number of voids were not large enough to show a surplus in 2021. However, an increase in the number of adaptable and accessible dwellings could help to reduce the requirement for sheltered housing.

The report summarises the following:

“Based on the current need and growth in population aged 75+ identified, the LHNA identified the potential requirement for new specialist housing for the period 2021-2041 using prevalence rates for sheltered housing from the Housing LIN SHOP resource pack and rates for extra care from Gloucestershire County Council. This analysis identifies a sheltered housing need of just over 14,500 dwellings (11,633 owned; 2,890 rented) in addition to a need for almost 900 dwellings provided as extra care (666 owned; 225 rented). Most of these properties will already be counted as part of the overall housing need; however, some extra care provision may offset some of the identified need for residential care counted in the allowance for C2 bedspaces”

“it was evident that three quarters of older person household own their homes and whilst many of these household will choose not to move, around a quarter of older households nationally would move to another home if there was suitable housing available that met their aspirations in the right place. Many of these households would have considerable equity available from the sale of their larger homes, therefore affordability is far less of a consideration for this group”

“Most household are seeking two bedrooms, although there is a reasonable demand for three-bedroom homes – typically from households currently living in properties with four bedrooms or more. There is a clear preference from bungalows”

“In conclusion, population projections show a large increase in older people between 2021 and 2041, an increase of 52, 232 persons aged 75+ and a corresponding need for dedicated housing options. However, it must be recognised that the identified need is based upon increasing the level of older people housing provision to idealised levels. In practice, this level of delivery is likely to be unachievable, but it is important to recognised that the provision of dedicated older person housing in the community which older people find desirable and suitable to live in as they age will release a considerable number of larger properties which will then be available for families.

Conclusions

The review of the local plans, planning statement and housing needs assessments projected a significant increase in the number of seniors within Cirencester and the wider county, particularly in the 75+ and 85+ age bracket. Therefore, there is a need for an increased number of integrated retirement communities to meet the needs of growing elderly population.

It is evident that the senior population within Cirencester and the surrounding area are predominantly owner occupiers of larger houses. This shows that this demographic are less impacted by affordability and therefore there is a demand for a high specification downsizing product.

It was noted within the Cirencester Town Planning Statement that there should be consideration within development for flexible accommodation for changing needs, access to public transport and facilitating the well-being of older people. Therefore, further supporting the need for Integrated Retirement Communities.

4. Needs assessment

4a. Area of Assessment

Catchment area

For this exercise, we have assessed need and provision for the local authority and a bespoke primary catchment area (PCA).

Cotswold is the local authority used within this report and the planning authority for this application. This has been the primary focus of the needs assessment.

We have also identified a primary catchment area (PCA) of 20 minutes' drive time around the site. This is used on the basis that moving into specialist seniors housing is a locally focused market, with new residents being typically drawn from the local area or because the individuals has a connection with the area; for example, seniors moving to be closer to family members.

As a benchmark, analysis from our Seniors housing Annual Review 2023/24 research highlights that approximately 50% of residents will be drawn from the PCA, although in practice the proportion will vary across schemes.

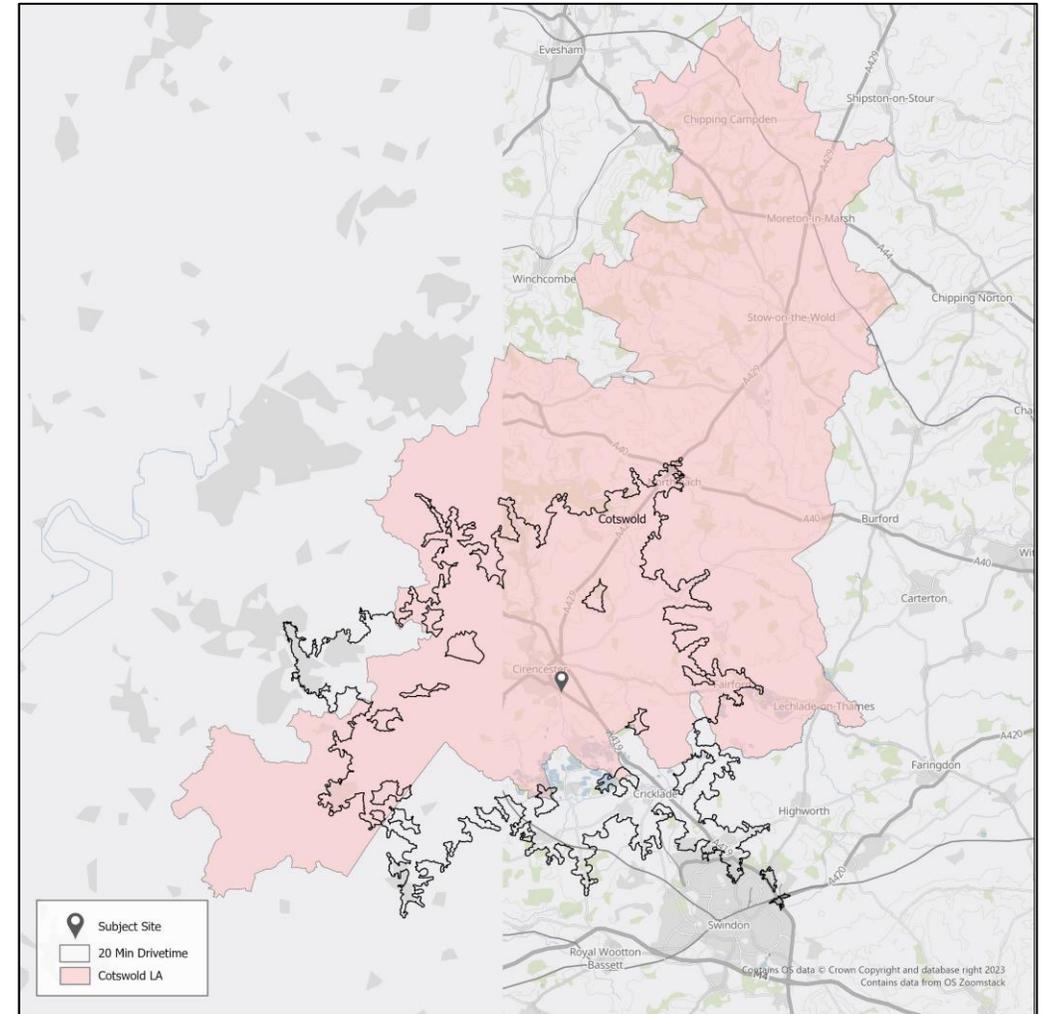
We also see residents being drawn to IRCs in aspirational locations, which we would consider the Cotswolds to be.

We have therefore based our assessment of need on both a local authority and catchment area as outlined on the map opposite.

We have also undertaken more detailed analysis on population trends in the local authorities surrounding Cotswold, and these are outlined below:

- Stratford-on-Avon
- West Oxfordshire
- Vale of White Horse
- Swindon
- Wiltshire
- South Gloucestershire
- Stroud
- Tewkesbury
- Cheltenham

Figure 11: Area of assessment – Cotswold Local Authority and PCA



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Note: For PCA population projections, we have taken an average of growth figures from Cotswold and the five neighbouring local authorities highlighted above and then applied this to the PCA population.

4b. Assessing Need

The process for assessing demand and need for seniors housing is not clear-cut. Unlike the Care Home market which relies on LaingBuisson's usage rates for care in a residential setting model, there is not a single, industry-standard model for defining demand for seniors housing.

Housing LIN have produced the Strategic Housing for Older People Resource Pack (SHOP) in 2013 which suggests two approaches for assessing this need.

A) Modelling through Care Home Demand

Although perhaps now a little dated, a paper published in 2004 estimated that about a third of the population entering a care home could have moved to a form of seniors housing as a viable alternative, with a further third who could have managed in such housing had they moved at some time earlier in their care history. Thus, if you were only considering how demand for care home provision could be reduced through the delivery of seniors housing, this evidence would suggest that at least one third of residents could have been diverted to more appropriate housing with care, and possibly up to two thirds if appropriate information and advice had been available. Consideration is then given to the impact other interventions in the community could have on this demand, such as the provision of telecare, aids, adaptations, and better information.

B) Modelling from Population data

There are a number of different models for estimating demand for supported housing. "Housing markets and independence in old age" offers one model. A more detailed approach is available in 'The Older Persons' Housing Toolkit' although assumptions on which it defines its prevalence rates are not included in the paper.

The SHOP Toolkit provides an indication of provision levels for different types of seniors housing. This ranges from conventional sheltered (affordable) housing through to private sheltered and extra care/housing with care provision.

Table 1: Housing LIN Strategic Housing for Older People Resource Pack (SHOP)

Forms of Provision	Estimate of demand per thousand of the relevant 75+ population
Conventional sheltered housing to rent	60
Leasehold sheltered housing	120
Enhanced sheltered housing	20 (50% allocated to private for sale)
Extra care housing for rent	15
Extra care (IRC) housing for sale	30
Housing based provision for dementia	6

This approach indicates that 30 extra care (IRC) for sale units (which are comparable to the units in the proposed scheme) are required per 1,000 people aged 75+ to meet the need. An additional 20 units are required per 1,000 people aged 75+ for enhanced sheltered housing, where 50% should be private for sale. This has also been included in our calculations.

A ratio of 40 units per 1,000 people i.e. a 4% penetration/prevalence rate has therefore been adopted to assess need for the proposed scheme. Note this will also be described as private IRC units within our Supply section.

It is acknowledged that whilst this is widely used within the industry, the toolkit is a relative assessment of demand and therefore subject to geographic variations and the influence of new developments. Despite these limitations, we believe that this is a robust method of assessing the gap between potential demand and supply within a particular area.

It should be noted that while the SHOP toolkit only assesses demand for the 75+ population, we will include analysis for both the 65+ and 75+ population. This is on the basis that those under the age of 75+ do move into specialist seniors housing and will also form the basis of future demand. Housing LIN have announced that they are developing an updated model to assess senior housing demand. The release date for the model remains to be confirmed.

4c. Population statistics



Table 2: 2024 Population estimates

Age	PCA		Cotswold		South West		England	
	#	%	#	%	#	%	#	%
0-4	6,758	5%	4,309	4%	487,520	5%	3,122,493	5%
5-9	7,884	6%	5,065	5%	549,424	6%	3,399,368	6%
10-14	8,865	6%	5,396	6%	604,179	6%	3,616,583	6%
15-19	7,771	6%	4,960	5%	573,059	6%	3,455,540	6%
20-24	5,727	4%	4,057	4%	498,584	5%	3,296,014	6%
25-29	6,231	5%	3,789	4%	524,228	6%	3,642,635	6%
30-34	6,659	5%	4,397	5%	558,394	6%	3,873,735	7%
35-39	8,153	6%	5,274	5%	584,595	6%	3,831,710	7%
40-44	8,880	6%	5,756	6%	612,642	7%	3,743,562	6%
45-49	8,504	6%	5,555	6%	585,825	6%	3,422,391	6%
50-54	10,129	7%	6,823	7%	628,461	7%	3,710,937	6%
55-59	10,607	8%	7,632	8%	649,927	7%	3,865,450	7%
60-64	9,875	7%	7,541	8%	600,319	6%	3,594,639	6%
65-69	8,548	6%	6,625	7%	500,550	5%	3,002,525	5%
70-74	7,436	5%	6,185	6%	440,828	5%	2,624,872	5%
75-79	7,020	5%	6,031	6%	437,783	5%	2,483,435	4%
80-84	4,579	3%	4,027	4%	281,399	3%	1,586,029	3%
85-89	2,750	2%	2,310	2%	178,487	2%	984,050	2%
90+	1,536	1%	1,317	1%	109,057	1%	560,922	1%
All Ages	137,912	100%	97,047	100%	9,405,259	100%	57,816,890	100%
65+ Total	31,869	23%	26,493	27%	1,948,104	21%	11,241,833	19%
75+ Total	15,885	12%	13,684	14%	1,006,726	11%	5,614,436	10%

We have assessed population trends for the PCA, Cotswold and benchmarked against the following geographic areas:

- South West of England region
- England

We have assessed potential demand based on the latest Census data and 2021-based population estimates.

For the purposes of this section, we analyse the population aged 65+ to determine current and future need. However, in our model we have focused on seniors aged 75+ as this is where need and age converge, and thus forms the most suitable basis for assessment.

There were an estimated 97,047 individuals in Cotswold as of 2024. Of this, 27% of the population are aged 65+, and 14% were aged 75+, amounting to just under 13,700 individuals. These proportions are slightly above the average for both the South West and England.

Figure 12: Breakdown of 2024 population estimates by 5-year age bands

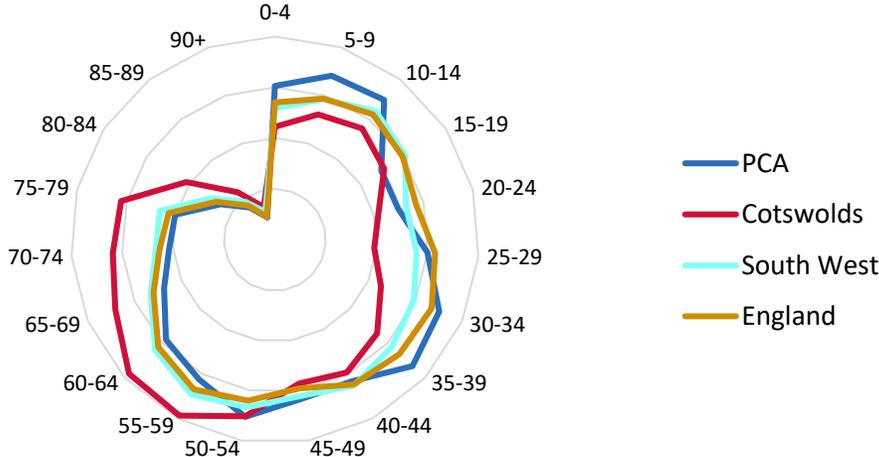


Table 3: 2024 Population estimates indexed against England (England = 100)

Age	PCA	Cotswold	South West
65-69	119	131	102
70-74	119	140	103
75-79	119	145	108
80-84	121	151	109
85+	117	140	111
90+	115	140	120
65+ Total	119	140	107
75+ Total	119	145	110

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Source for data on this slide: Knight Frank Research, ONS, 2020 mid-year population estimates, 2018-based population projections
 Note that we have included the latest data from the 2021 Census where available – this is for local authority, regional and national data only.

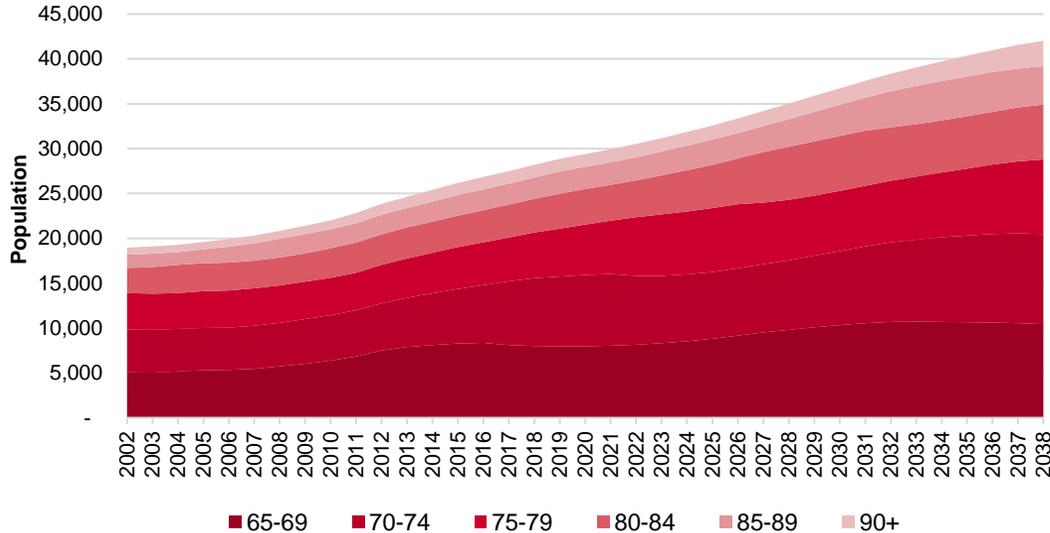
4d. Population change



The 65+ and 75+ age cohorts have increased at a considerably faster rate than the under-65 age groups in both the PCA and Cotswold. The primary target market is 75+ though additional demand may also come from the 65-74 cohort. There has been a 44% increase in the total number of individuals aged 75+ residing in Cotswold since 2014, while over the same period it is estimated that the number of individuals aged under 65 has increased by 29%. Similar trends can be seen in the PCA.

Figure 13: PCA population change – 2002-2038

PCA - Share of 65+ population by age band



Source: Knight Frank Research, ONS, 2020 mid-year population estimates
 Note that we have included the latest data from the 2021 Census where available – this is for local authority, regional and national data only.

Table 4: PCA and Cotswold population change – 2014-2024

	PCA			Cotswold		
	2014	2024	% Change	2014	2024	% Change
Under-65's	100,232	106,042	6%	64,150	70,554	10%
65-69	8,107	8,548	5%	6,208	6,625	7%
70-74	5,750	7,436	29%	4,809	6,185	29%
75-79	4,531	7,020	55%	3,666	6,031	64%
80-84	3,488	4,579	31%	2,906	4,027	39%
85-89	2,212	2,750	24%	1,823	2,310	27%
90+	1,298	1,536	18%	1,094	1,317	20%
65+	25,386	31,869	26%	20,506	26,493	29%
75+	11,529	15,885	38%	9,489	13,684	44%
Total population	125,618	137,912	10%	84,656	97,047	15%

Source: Knight Frank Research, ONS, 2020 mid-year population estimates

Between 2014 and 2024, the 65+ population in Cotswold grew by 5,987 and the 75+ population grew by 4,195. The largest growth in percentage terms was in the 75-79 and 80-84 age cohorts, which respectively grew by 64% and 39% over the 10-year period. The older age cohorts are most likely to require and benefit from specialist seniors housing.

4e. Population forecasts



Population projections from the ONS suggest that between 2024 and 2034, the population of Cotswold will increase by 10%.

However, the area will undergo substantial growth within the older age groups with the 65+ and 75+ age cohorts both set to increase by 28%. By comparison, the population of under-65's will see an increase of 3%.

The population of individuals aged 65+ will increase to a projected total of c.7,457 individuals by 2034. In percentage terms, the largest growth will come from the 85-89 age cohort which is expected to grow by 67% during the period, followed by the 90+ and 80-84 age cohorts, which are expected to grow by 46% and 31%, respectively.

Figure 14: PCA Projected population change 2024-2034

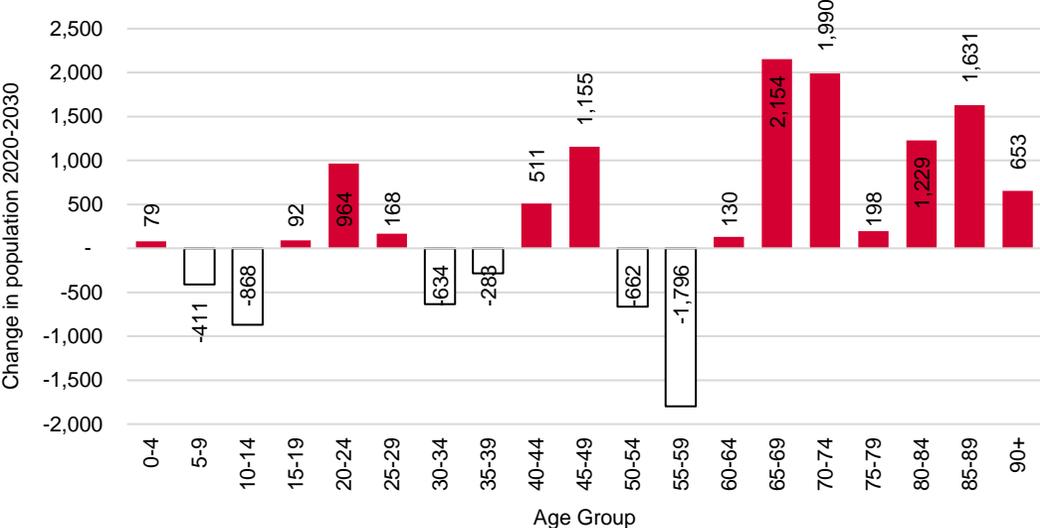


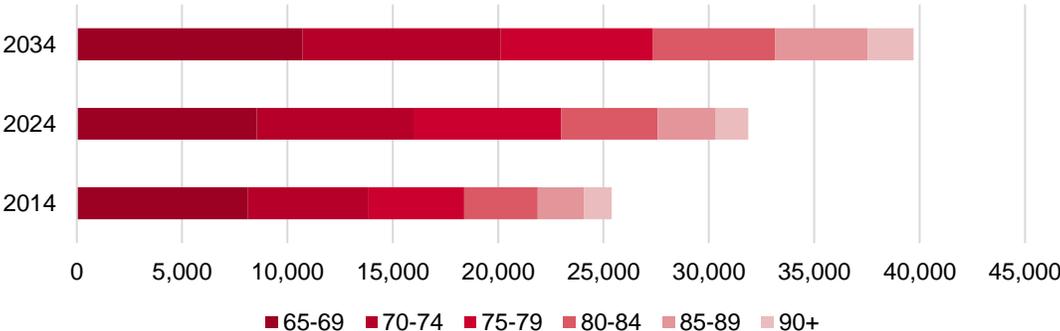
Table 5: PCA and Cotswold projected population change 2024-2034

	PCA			Cotswold		
	2024	2034	% Change	2024	2034	% Change
Under-65's	106,042	104,486	-1%	70,554	72,950	3%
65-69	8,548	10,702	25%	6,625	8,448	28%
70-74	7,436	9,426	27%	6,185	7,993	29%
75-79	7,020	7,217	3%	6,031	6,482	7%
80-84	4,579	5,807	27%	4,027	5,260	31%
85-89	2,750	4,381	59%	2,310	3,852	67%
90+	1,536	2,189	43%	1,317	1,916	46%
65+	31,869	39,724	25%	26,493	33,950	28%
75+	15,885	19,595	23%	13,684	17,510	28%
Total population	137,912	144,210	5%	97,047	106,900	10%

Source: Knight Frank Research, ONS

During the 2024-2034 period, the 65+ population in the PCA is expected to grow by 7,854 and the 75+ population by 3,710.

Figure 13: 65+ Population profile – PCA



Source: Knight Frank Research, ONS, 2020 mid-year population estimates, 2018-based population projections
 Note for PCA population projections, we have taken an average of growth figures from both Cotswold and Runnymede local authorities and applied this to the PCA population.
 Note that we have included the latest data from the 2021 Census where available – this is for local authority, regional and national data only.

4f. Surrounding borough trends



The Cotswold senior's population is the second fastest growing in this area of the South West of England. With the exception of Swindon, Cotswold has the highest projected growth (in both absolute and percentage terms) of 75+ population over 2024-2034 period out of all the surrounding local authorities.

Population projections from the ONS suggest that by 2034, the 75+ population in Cotswold will grow by 3,826, constituting a 28% increase. The average increase across all neighbouring local authorities is 22%. This increased demand must be catered for with the increased provision of seniors housing.

Figure 16: Population projections of Cotswold and surrounding LAs 2024-2034

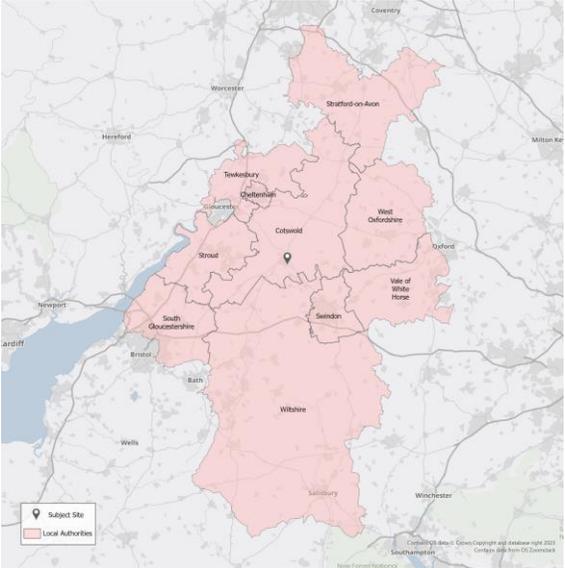
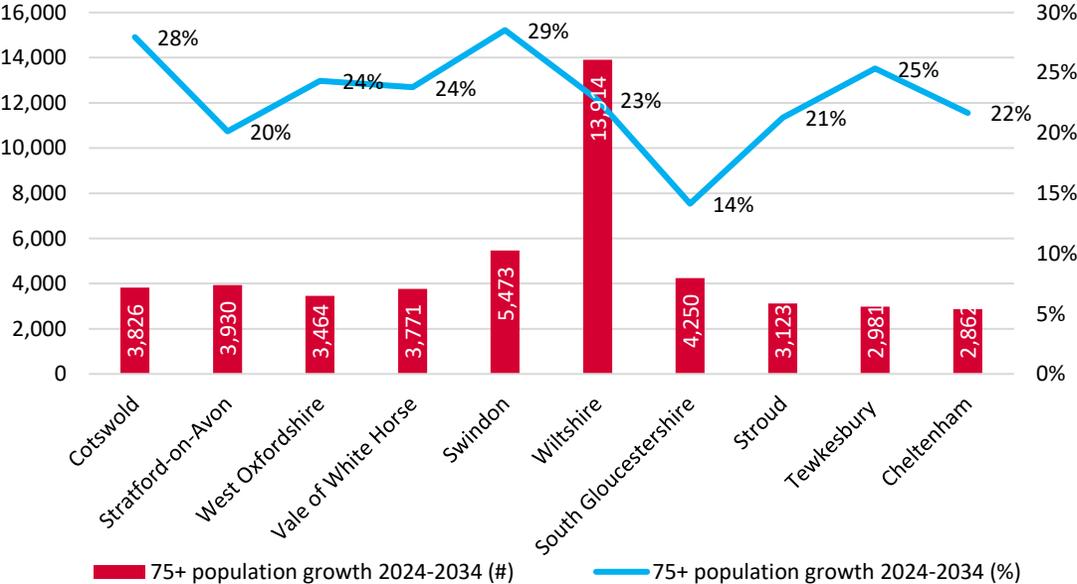


Figure 17: Cotswold Surrounding Local Authorities

Table 6: Surrounding Local Authorities projected population change 2024-2034

	2024 – 75+ Population	2034 – 75+ Population	75+ population growth 2024-2034 (%)	75+ population growth 2024-2034 (#)
Cotswold	13,684	17,510	28%	3,826
Stratford-on-Avon	19,508	23,438	20%	3,930
West Oxfordshire	14,243	17,707	24%	3,464
Vale of White Horse	15,854	19,625	24%	3,771
Swindon	19,172	24,645	29%	5,473
Wiltshire	61,150	75,064	23%	13,914
South Gloucestershire	30,096	34,346	14%	4,250
Stroud	14,676	17,799	21%	3,123
Tewkesbury	11,764	14,745	25%	2,981
Cheltenham	13,213	16,075	22%	2,862

Source: Knight Frank Research, ONS, 2020 mid-year population estimates, 2018-based population projections
 Note: For PCA population projections, we have taken an average of growth figures from both Cotswold and Runnymede local authorities, and applied this to the PCA population.
 Note that we have included the latest data from the 2021 Census where available – this is for local authority, regional and national data only.

4g. Need projections



We have used the ONS 2021 based population estimates and projections for the 75 population in Cotswold for 2024 and 2034.

The Housing LIN SHOP toolkit has then provided an indicative assessment of demand for seniors housing. As outlined on page 21, we will use the ratio for extra care (IRC) for sale units (as we understand that this is what is currently proposed), which equates to 30 units per 1,000 individuals aged 75+ plus 10 enhanced sheltered housing units per 1,000 individuals aged 75+. This gives a ratio of 40 units per 1,000 75+ population, translating to a 4% penetration/prevalence rate. This is outlined in the SHOP toolkit table below:

Table 7: Housing LIN Strategic Housing for Older People Resource Pack (SHOP)

Forms of Provision	Estimate of demand per thousand of the relevant 75+ population
Conventional sheltered housing to rent	60
Leasehold sheltered housing	120
Enhanced sheltered housing	20 (50% allocated to private for sale)
Extra care housing for rent	15
Extra care (IRC) housing for sale	30
Housing based provision for dementia	6

Table 8: Estimated need in PCA and Cotswold – 2024-2034

		2024	2034	Change #	Change %
PCA	75+ population	15,885	19,595	3,710	23%
	Estimated Units Needed	635	784	148	23%
Cotswold	75+ population	13,684	17,510	3,826	28%
	Estimated Units Needed	547	700	153	28%

The toolkit suggests there is currently an estimated demand for 547 extra care (IRC) for sale units in Cotswold to cater for its existing 13,684 residents aged 75+. This is expected to rise over the next decade, with an additional 153 units required by 2034. It is therefore estimated that by 2034, there will be 17,510 individuals aged 75+ in Cotswold, with a need for 700 units, a growth of almost 28% in just ten years.

Regarding the extend of need for purpose-built seniors housing within the PCA, we are estimating a current need of 635 units in the PCA, increasing to 784 by 2034.

Estimates for Cotswold will differ to figures reported in the Gloucestershire SHMA (2016). This is due to our use of the latest ONS population projections (2021 based) and an updated HousingLIN SHOP toolkit, which were not available at the time of the SHMA published in 2016. Nonetheless, it is clear from both sets of figures that there is an increasing elderly population in Cotswold, with a growing demand for specialist housing for seniors across the area.

Whilst this methodology is well regarded in the market, this is a relatively simplistic view of demand. The toolkit uses population rather than household levels to assess demand. We believe that seniors will move or downsize as a household rather than individuals.

Moreover, this also does not consider any wealth or affordability metrics which would need to be understood to identify the true target market. In addition, the model focuses solely on the 75+ population and additional demand for leasehold Housing with Care housing does exist for the under 75 population. Despite this, the demand will continue to grow in the coming years.

4h. Additional Demand

As outlined earlier in this report, needs assessments are based on the population aged 75 as this is the age at which age and need typically converge, and there is a requirement for some level of support within the home. The average entry age of a senior in a private extra care scheme is 77 (Knight Frank Annual Review 2023/24).

There will be additional 'need' for seniors housing from those aged 65 to 74 who would benefit from specialised extra care accommodation. There will be others aged 65-74 who may not have a 'need' but choose to do so for other reasons than their own requirement for assistance – we refer to this as 'demand'. Those aged 65-74 may choose to move into a seniors housing development if they wish to downsize, or to benefit from being part of a "community" of like-minded individuals. Demand will also come from those who are widowed who may seek more companionship or do not want the stress and expense of household maintenance.

This demand is difficult to measure as so much varies by individual preferences and area. There is no established metric for 'need' for extra care schemes for those aged under 75. Given that those aged 65-74 who move into seniors housing schemes will generally have less intensive care needs, they will also consider retirement housing schemes without the ability to provide on-site domiciliary care.

To assess the potential demand for the proposed development for those aged 65+, we have run scenarios based on the number of individuals aged 65-74 who may consider moving into leasehold extra care accommodation. This has been run at 1%, 2%, 3% and 4% proportions of the population aged 65-74. This has allowed us to illustrate scenarios for additional 'demand' from the younger age cohorts. Please note this is not a form of needs assessment.

Through assessing this potential additional demand both in Cotswold and the primary catchment area, it is clear that there is not nearly enough units (across both extra care and retirement housing) to accommodate even a 4% demand from the 65-74 age cohort in the PCA or Cotswold.

Table 9: Cotswold potential additional demand from 65-74 age cohorts – 2024-2034

	65-74 Population (2024)	65-74 Population (2034)	Change
Total population	12,819	16,441	3,622
Potential additional demand from younger cohorts			
Scenario A- 1%	128	164	36
Scenario B- 2%	256	329	72
Scenario C- 3%	385	493	109
Scenario C- 4%	513	658	145

Table 10: PCA potential additional demand from 65-74 age cohorts – 2024-2034

	65-74 Population (2024)	65-74 Population (2034)	Change
Total population	15,984	20,128	4,144
Potential additional demand from younger cohorts			
Scenario A- 1%	160	201	41
Scenario B- 2%	320	403	83
Scenario C- 3%	480	604	124
Scenario C- 4%	639	805	166

Source: ONS, Knight Frank

5. Supply landscape

5a. Seniors housing supply

Existing Supply

Using data from the Elderly Accommodation Counsel (EAC), we have assessed the current supply of seniors housing within the PCA and Cotswold. EAC classifies schemes into the following categories:

- Age Exclusive (falls within Knight Frank (KF) definition of Retirement Housing)
- Sheltered (falls within KF definition of Retirement Housing)
- Enhanced Sheltered (some schemes are included in KF definition of Housing with Care / IRC)
- Extra Care Housing (KF definition of Housing with Care / IRC)
- Close Care Housing

We outline provision of the above on pages 32-34, with separate analysis for both catchments. Note that there will be some overlap in terms of schemes appearing in both the PCA and Cotswold datasets. To assess the potential competition to this proposed seniors housing scheme, we have focused this analysis on higher care acuity and provision. We have broadly used EAC definitions for Extra Care and Enhanced Sheltered housing to identify comparable supply but used Knight Frank definition of IRC for reporting purposes.

Private new build IRC schemes are the most comparable to the proposed development. Traditional age exclusive sheltered housing has been included within the reporting but excluded in the existing comparable supply analysis.

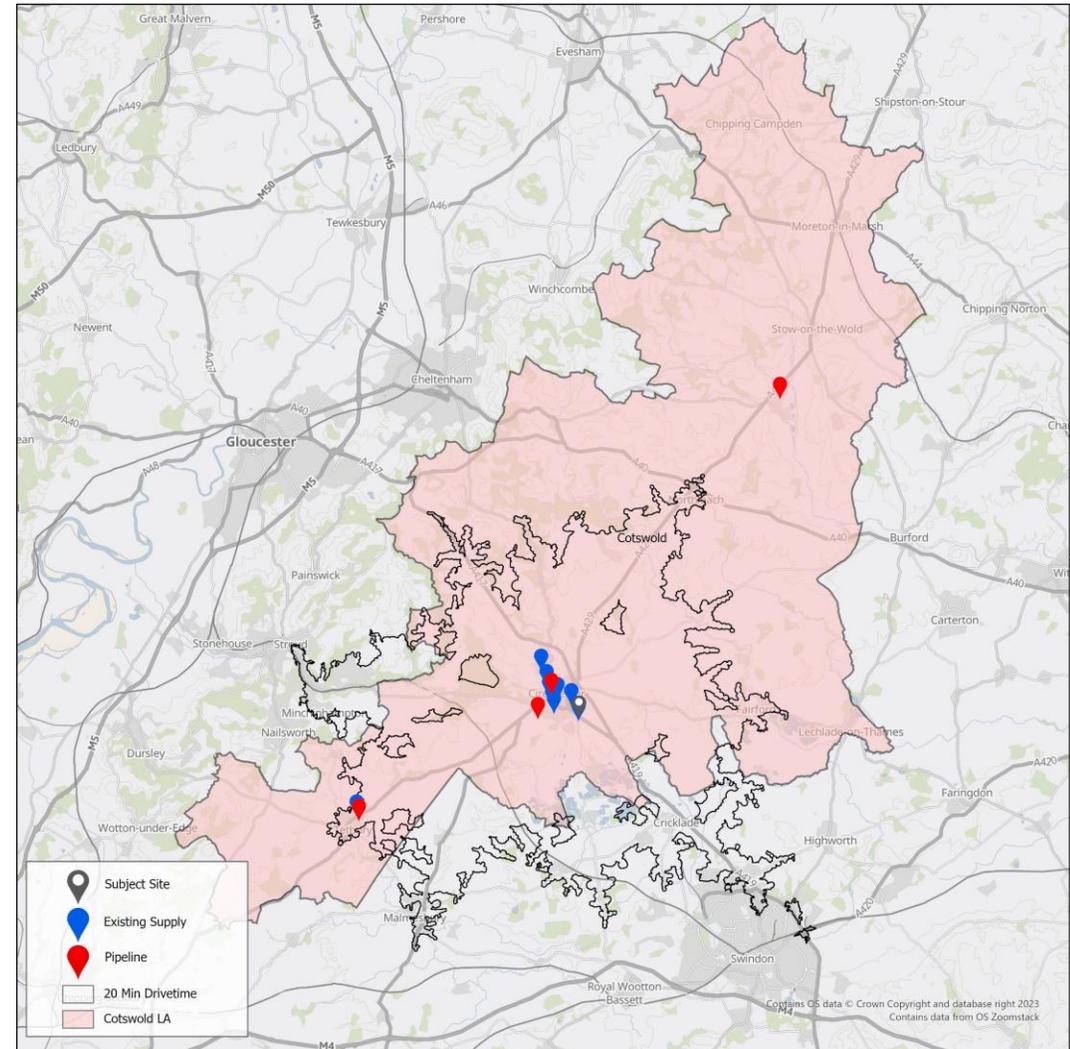
We have analysed schemes catering to the private market (both sales and rental), and therefore have excluded social housing schemes. This range encompasses schemes with different operating models at markedly different price points. Information on proposition, tenure, age, scheme size and amenity provision have been provided in Table 19.

Future Supply

We have reviewed the seniors housing pipeline in the PCA and Cotswold by identifying all schemes in the planning system with an application submitted for a private seniors housing scheme.

Using planning portals, we have conducted a comprehensive review of all planning applications updated over the last 12 months that fall within the boundaries. This is imperative in understanding which schemes will be comparable to the proposed scheme, once completed.

Figure 18: Existing and pipeline private seniors housing map in PCA and Cotswold



5b. Existing seniors housing supply - Cotswolds



Table 11: Existing seniors housing schemes in Cotswolds by tenure

	# units	# schemes	% of total units
Private Sale or Rental	1,225	34	56%
Social Housing	950	53	44%
Total existing stock	2,175	87	100%

Table 12: Existing seniors housing schemes in Cotswolds by age

	Private Sale or Rental		Social Housing	
	# units	# schemes	# units	# schemes
Unknown	32	1	27	3
Pre-1980	0	0	681	44
1980-1989	345	11	182	5
1990-1999	134	5	0	0
2000-2009	59	4	0	0
2010 onwards	655	13	60	1
Total existing stock	1,225	34	950	53

Table 13: Existing seniors housing schemes in Cotswolds by type

KF Definition	EAC Definition	Private Sale/Rent		Social Housing	
		# units	# schemes	# units	# schemes
Retirement Housing	Age Exclusive, Sheltered	896	28	799	49
IRC	Extra Care, Enhanced Sheltered	329	6	151	4

There are 2,175 existing seniors housing units in the Cotswolds District across 87 schemes. 56% of these are private units, equating to 1,225 units across 34 schemes.

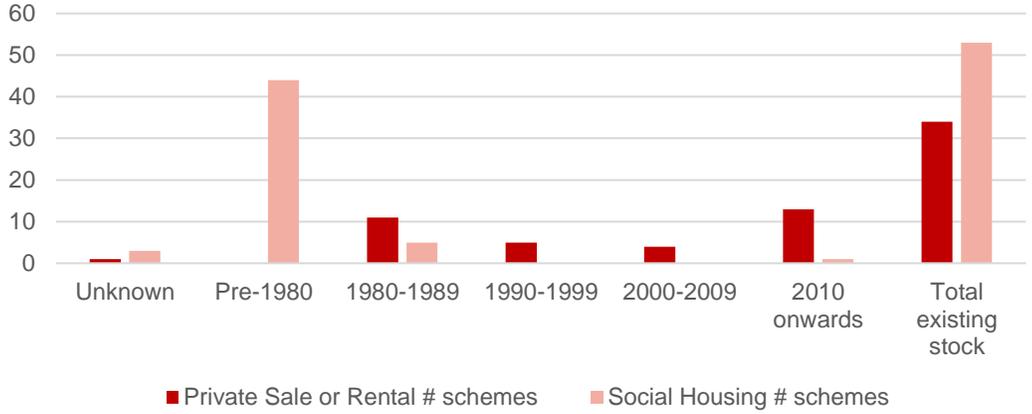
Of the 34 private schemes in the Cotswolds District 38% have been delivered since 2010.

There is a relatively limited supply of private seniors housing within Cotswolds District and as a result, there are only a handful of private IRC developments. These are outlined in the schedule in Table 14. Note that one of these existing schemes is Phase 1 of the Subject Site which comprises of 123 units.

Table 14: Summary of existing private schemes in Cotswolds

	# Private units	# Private schemes
Existing private stock	1,225	34
Existing private (leasehold) IRC stock	329	6
Existing private (leasehold) IRC stock built since 2010	304	4
Existing comparable private IRC schemes	329	6

Figure 19: Existing seniors housing schemes in Cotswolds by age



5c. Existing seniors housing supply - PCA



Table 15: Existing seniors housing schemes within PCA by tenure

	# units	# schemes	% of total units
Private Sale or Rental	1,029	28	56%
Social Housing	795	39	44%
Total existing stock	1,824	67	100%

There are 1,824 existing seniors housing units within the primary catchment area across 67 schemes. 56% of these are private units, equating to 1,029 units across 28 schemes.

Of the 28 private schemes in the primary catchment area, 10 have been delivered since 2010, however this is including Phase 1 of the Subject Site which equates to 123 units.

Table 16: Existing seniors housing schemes within PCA by age

	Private Sale or Rental		Social Housing	
	# units	# schemes	# units	# schemes
Unknown	62	3	18	2
Pre-1980	0	0	560	32
1980-1989	324	9	95	3
1990-1999	82	3	62	1
2000-2009	63	3	0	0
2010-2019	304	7	60	1
2020 onwards	194	3	0	0
Total existing stock	1,824	28	795	39

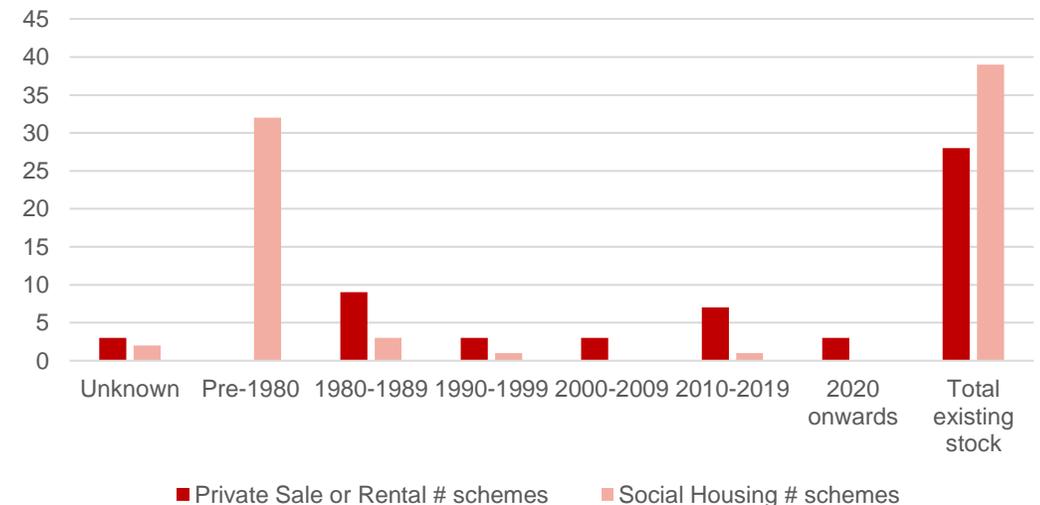
Table 18: Summary of existing private schemes within PCA

	# Private units	# Private schemes
Existing private stock	1,029	28
Existing private (leasehold) IRC stock	182	3
Existing private (leasehold) IRC stock built since 2010	182	3
Existing comparable private IRC schemes	182	3

Table 17: Existing seniors housing schemes within PCA by type

KF Definition	EAC Definition	Private Sale/Rent		Social Housing	
		# units	# schemes	# units	# schemes
Retirement Housing	Age Exclusive, Sheltered	847	25	735	38
IRC	Extra Care, Enhanced Sheltered*	182	3	60	1

Figure 20: Existing seniors housing schemes within PCA by age



5d. Existing seniors housing supply schedule

Table 19: Private schemes in the Local Authority and PCA built since 2004

Scheme Name	Address	Year Built	Units	Tenure	Product	Care Provided	Operator	Market
Mill Place	Gloucester Street, Cirencester, Gloucestershire, GL7 2BG	2004	16	Private Sale	Retirement Housing	No	Cognatum Estates	PCA / Local Authority
Mulberry Court	Middle Mead Road, Cirencester, Gloucestershire, GL7 1GG	2011	60	Social Rent	Integrated Retirement Community	Yes	Housing 21	PCA / Local Authority
Westwood Court	Somerford Road, Cirencester, Gloucestershire, GL7 1TX	2006	14	Private Sale	Retirement Housing	No	Broadleaf Management Services	PCA
Stuart Court	Butt Street, Minchinhampton, Stroud, Gloucestershire, GL6 9JB	2007	33	Private Sale	Retirement Housing	No	Cognatum Estates	PCA
Townsend Court	Priory Way, Burton Hill, Malmesbury, Wiltshire, SN16 0FB	2012	28	Private Sale	Integrated Retirement Community	No	Kingsdale Group	PCA
Blunsdon Court	Lady Lane, Thamesdown Drive, Swindon, Wiltshire, SN25 2NA	2015	24	Private Sale	Retirement Housing	No	McCarthy Stone	PCA
Lewsey Court	London Road, Tetbury, Gloucestershire, GL8 8GW	2015	39	Private Sale	Retirement Housing	No	McCarthy Stone	PCA / Local Authority
Beecham Lodge	Somerford Road, Cirencester, Gloucestershire, GL7 1WR	2016	35	Private Sale	Retirement Housing	No	Churchill	PCA / Local Authority
Bath Gate Place	Hammond Way, Tetbury Road, Cirencester, Gloucestershire, GL7 1ZJ	2017	34	Private Sale	Retirement Housing	No	McCarthy Stone	PCA / Local Authority
Steepleton	Cirencester Road, Tetbury, Gloucestershire, GL8 8FQ	2017	113	Private Sale	Retirement Housing	No	Pegasus Homes	PCA / Local Authority
Stratton Court	Gloucester Road, Cirencester, Gloucestershire, GL7 2LA	2017	31	Private Sale	Integrated Retirement Community	Yes	Aura Care Living	PCA / Local Authority
Siddington Park Retirement Village*	, Siddington, Cirencester, Gloucestershire, GL7 6ET	2022	123	Private Sale	Integrated Retirement Community	Yes	Rangeford Villages	PCA / Local Authority
Leaholme Court	Cirencester, Gloucestershire, GL7 1EG	2023	44	Private Rent	Retirement Housing	No	Bromford	PCA
Kings Mews	Vicarage Gardens, Malmesbury, Wiltshire, SN16 9NZ	2023	27	Private Sale	Retirement Housing	No	GreenSquare	PCA

- * Siddington Park refers to Phase 1 of the Subject Development. Phase 2 (the Subject Site) will provide an additional 57 units.

5d. Existing seniors housing supply schedule

Table 19: Private schemes in the Local Authority and PCA built since 2004

Scheme Name	Address	Year Built	Units	Tenure	Product	Care Provided	Operator	Market
Leaholme Court	Cirencester, Gloucestershire, GL7 1EG	2023	44	Private Rent	Retirement Housing	No	Bromford	Local Authority
Brio Beechwood Park	Wintergreen Court, Fosseyway, Stow-on-the-Wold, Gloucestershire, GL54 1FP	2021	106	Private Sale	Integrated Retirement Communities	Yes	Brio Retirement Living	Local Authority
Cotswold Gardens	Willow Road, Willersey, Broadway, Worcestershire, WR12 7QE	2020	12	Private Sale	Retirement Housing	No	Cognatum Estates	Local Authority
Hawkesbury Place	Fosseyway, Stow-on-the-Wold, Cheltenham, Gloucestershire, GL54 1FF	2018	44	Private Sale	Integrated Retirement Communities	No	McCarthy Stone	Local Authority
Willoughby Place	Station Road, Bourton-on-the-Water, Cheltenham, Gloucestershire, GL54 2FF	2017	20	Private Sale	Retirement Housing	No	McCarthy Stone	Local Authority
Keatley Place	Hospital Road, Moreton-in-Marsh, Gloucestershire, GL56 0DQ	2017	34	Private Sale	Retirement Housing	No	McCarthy Stone	Local Authority
Saxon Grange	Sheep Street, Chipping Campden, Gloucestershire, GL55 6BY	2013	20	Private Sale	Retirement Housing	No	McCarthy Stone	Local Authority
Westwood Court	Somerford Road, Cirencester, Gloucestershire, GL7 1TX	2006	14	Private Sale	Retirement Housing	No	Broadleaf Management Services Ltd	Local Authority

5e. Future seniors housing supply



Using the Cotswolds District and other local authorities planning portals, we have identified the following applications as containing seniors housing units.

Within Cotswolds, there are only two applications for private Senior's Housing, as listed below:

- The Steadings – Outline Plans granted for the application for the construction of up to 2,350 residential units including 60 homes from the elderly.
- Farrell Close Retirement Living Apartment – Pre-planning for the redevelopment of up to 70 retirement living apartments, including communal facilities, access, car parking and landscaping and up to 280 sqm of commercial space.

There are currently no Integrate Retirement Housing developments in planning. The majority of Senior's Housing development comprises of retirement housing.

Table 20: Pipeline summary for PCA and Cotswolds District

Private IRC pipeline schemes	PCA		Cotswold	
	# Private IRC units	# Private IRC schemes	# Private IRC units	# Private IRC schemes
Planning granted or under construction	60	1	-	-
Planning submitted	63	1	56	1
Pre-planning	70	1	-	-
Total pipeline to be delivered by 2034	193	3	56	1

Key

Private IRC scheme in Cotswold Local Authority (also falls in PCA)
Private IRC scheme in PCA

Table 21: Pipeline seniors housing schemes in PCA and Cotswolds District (continued on next page)

Scheme Name	Address	Developer	Description	Tenure	Product	Care Provided	Planning Stage	Contract Stage	Seniors Housing units	Application Number	Local Authority	Market
The Steadings	Land At Chesterton Farm, Cranhams Lane, Cirencester, Gloucestershire, GL7 6JP	Bathurst Development Ltd	Scheme comprises outline application for a mixed-use development comprising demolition of buildings and the construction of up to 2,350 residential units with 50% affordable housing units, SUDS and natural ventilation (including up to 100 units of student accommodation and 60 homes for the elderly)	Social Housing	RH	No	Outline Plans Granted	Start On Site	60	16/00054/OUT	Cotswold	PCA
Farrell Close Retirement Living	Tesco, Farrell Close, Cirencester, Gloucestershire, GL7 1HW	Churchill Retirement Living	Scheme comprises redevelopment to form up to 70 retirement living apartments, including communal facilities, access, car parking and landscaping and up to 280sqm of commercial space (class e).	Private Housing	RH	No	Pre-Planning	Contract Awarded	70	24/01030/SCR	Cotswold	PCA

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5e. Future seniors housing supply

Table 21: Pipeline seniors housing schemes in PCA and Cotswolds District (continued)

Scheme Name	Address	Developer	Description	Tenure	Product	Care Provided	Planning Stage	Contract Stage	Seniors Housing units	Application Number	Local Authority	Market
Care Village – Phase 2 – Steepleton, Tetbury	Steepleton Court, Cirencester Road, Tetbury, Gloucestershire, GL8 8FQ	Lifestory	Scheme comprises construction of buildings to expand an existing care village it houses a total of 63 apartments including 42 one bedroom apartments and 21 two bedroom apartments together with landscaping, parking, access and associated works.	Private Housing	RH	No	Detailed Plans Submitted	Pre-Tender	63	23/02424/FUL	Cotswold	PCA
Station Road, Cheltenham	Station Road (Former Co-Op Site), Station Road, Bourton-on-the-Water, Cheltenham, Gloucestershire, GL54 2EP	Lifestory	Scheme comprises demolition of existing buildings, hardstanding and Phased redevelopment to provide a) residential units (18 market housing units and 8 affordable housing units comprising 2 one bedroom, 10 two bedroom, 8 three bedroom and 6 four bedroom) b) 56 retirement housing comprising 36 one bedroom and 20 two bedroom and c) shared access drive, with each Phase being an independent act of development, along with landscaping, laying of roads, parking, drainage, energy centre and other associated works including sustainable urban drainage system.	Private Housing	RH	No	Detailed Plans Submitted	Contract Awarded	56	24/00627/FUL	Cotswold	Local Authority

6. Conclusions

6a. Needs Assessment

We have applied the Housing LIN SHOP toolkit methodology to assess the potential demand for private IRC units in the PCA and Cotswold Local Authority. This is based on a ratio of 30 leasehold extra care (IRC) and 10 enhanced sheltered units required per 1,000 individuals aged 75+, totalling a ratio 40 of units per 1,000, a prevalence rate of 4%. Current population figures (2020 mid-year estimates) for 2024 have been used alongside 2018-based population projections for 2034. Note that the latest Census data for 2021 has been incorporated for local authority, regional and national figures, where possible. This has enabled us to fully understand any potential increase in 75+ population which may increase the need for greater provision.

The population and demand figures have been analysed alongside existing and pipeline supply of seniors housing in the PCA and Cotswold to estimate the potential shortfall of provision. The full supply pipeline has been assessed from pre-app stage to under construction/imminent completion. Only private units with planning submitted, planning granted or under construction have been included in the current demand supply balance analysis, on the basis that these have a higher likelihood of completion compared to those in the pre-app stages.

Analysis indicates there is a current need for 547 private extra care (IRC) for sale units in Cotswold to provide for a 75+ population of 13,684. Currently, there is only a small provision of private IRC in the local authority, resulting in an estimated shortfall of 218 units. The PCA has a higher population density than the wider local authority, and as such has a higher need – 635 units with a current shortfall of 453 units.

ONS projections forecast a significant increase in the number of individuals aged 75+ in Cotswold. On this basis, we have calculated there will be a need for 700 private IRC units in Cotswold by 2034, and 784 units in the PCA.

Alongside these projections is a small pipeline of private IRC units – 56 units in Cotswold local authority, and 193 units in the wider PCA. As a result, we estimate the shortfall of private IRC units will marginally reduce by 2034, however there will still be an undersupply of 315 units in Cotswold and 409 units in the PCA. Our methodology assumes that all schemes in the pipeline will be built out. In reality this may not be the case, so we might expect the actual shortfall to be higher than illustrated in this report. This is owing to the uncertainty regarding whether or not a scheme will be completed. In addition, our analysis is based on the Housing LIN SHOP toolkit methodology, which does not take into account the significant population aged 65-74, some of which will need, or choose to move into an IRC development. As outlined on page 29, should 4% of the 65-74 population require IRC units, there would be a need for 658 units in Cotswold and 805 in the PCA by 2034, in addition to the need from the 75+ population.

As it stands, it is clear that an increased provision of seniors housing is required to meet the growing need in Cotswold. The proposed second phase of Siddington Park will help address the need for purpose-built seniors housing in PCA and wider local authority.

Table 22: Estimated current demand supply balance (2024)

Demand	PCA	Cotswold
75+ population (2024)	15,885	13,684
Estimated need for units*1	635	547
Supply		
Existing private extra care (IRC) units	182	329
Demand supply balance		
Estimated shortfall	453	218

Table 23: Estimated future demand supply balance (2034)

Demand	PCA	Cotswold
75+ population (2034)	19,595	17,510
Estimated need for units*1	784	700
Supply		
Existing units	182	329
Pipeline private extra care (IRC) units with planning granted or under construction*3	60	0
Pipeline private extra care (IRC) units with planning submitted	63	56
Pipeline private extra care (IRC) units currently at pre-app stage	70	0
Total projected private extra care (IRC) supply in 2034 *2	375	385
Demand supply balance in 2034		
Estimated shortfall (including all schemes in planning process including pre-apps) in 2034	409	315

*1 Need is based on SHOP toolkit table on page 25 for extra care for sale units.

*2 includes schemes in the pipeline with either planning approved or submitted. This excludes schemes in the pre-planning stage and schemes which have had planning refused

*3 assumes all schemes currently in planning are completed and added to total supply.

Source for all tables and figures on this page: Knight Frank, Housing LIN, ONS, EAC, local authority planning portals

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Disclaimer

The report has been prepared as a needs assessment on the behalf of Rangeford in relation to their planning application for the development of a seniors housing scheme at Siddington Park, Cirencester, GL7 6GU.

It must not be used for any other purpose. It must not be disclosed to any other parties except to the relevant planning authority. We are not advising on your planning application or providing any planning services. Rangeford agree that (and the report will be endorsed): "This report was prepared according to the information and instructions provided to us by Rangeford and is provided on a non-reliance basis. Knight Frank LLP (and our affiliates, members and employees) will have no responsibility or liability whatsoever in relation to the accuracy, reliability, currency, completeness or otherwise of its contents or as to any assumption made or as to any errors or for any loss or damage resulting from any use of or reference to the contents." We have utilised several different resources to collate information on demographics and the existing care provision.

All investigations have been undertaken on a desktop basis, and whilst we have made all reasonable endeavours to ensure the accuracy of the information, we have not visited planned sites and competing schemes to qualify information.

We have relied upon the information supplied by the data sources used and assume this information to be correct for the purposes of this needs assessment report.

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