

Specialist and Supported Housing Needs Assessment

Report for Oxfordshire County Council

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Housing Learning and Improvement Network

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Executive Summary

This research is an assessment of the future need, over the next 10-20 years, for specialist and supported housing and accommodation in Oxfordshire.

The scope of this specialist housing, supported housing and accessible housing need assessment includes:

- Older people (55+ years).
- Adults with a learning disability/Autistic people; including children/young people living with their families who are likely to 'transition' to eligibility to adult services.
- Adults with serious mental health needs.
- Adults with physical disabilities/long term conditions.
- Young people with support needs (specifically care leavers).

Estimates of need for supported, specialist and accessible homes, as appropriate for each of the cohorts above, are shown for the next 10 years to 2034. These are extrapolated forward to 2044 for cohorts with larger populations (in relation to specialist housing for older people and accessible homes for people with physical disabilities) and extrapolated forward to 2039 for cohorts with relatively small populations (adults with a learning disability/Autistic people; adults with mental health needs). In relation to vulnerable young people (specifically care leavers) where the need is for short term supported accommodation and the population is relatively small, need for supported housing and 'move-on' housing is estimated over the next 5 years to 2029.

Estimated need for specialist housing and accommodation: Older people

Evidence from a representative survey of c.5,600 older people aged 50+ across the UK conducted by Ipsos and the Housing LIN in December 2023 indicates that the majority of people aged 65+ intend to either remain in their existing homes (with or without making adaptations) or move to other types of mainstream housing (across all tenures). The evidence from this survey in relation to the preferences of people aged 65+ and 75+ to move to specialist housing for older people and their stated likelihood of doing so has been applied to Oxfordshire and summarised below. Estimates of need for retirement housing/sheltered housing and extra care housing to 2044 for Oxfordshire are shown in below.

Estimated need for specialist housing for older people to 2044 in Oxfordshire (units).

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2041	Estimated need by 2044
Retirement/sheltered housing (units)	2,821	4,051	5,216	6,046	6,446	7,046
market sale	1,934	2,777	3,054	3,540	3,774	4,126
shared ownership	282	405	522	605	645	705
social/affordable rent	605	869	1,640	1,901	2,027	2,216
Extra care housing (units)	1,117	1,384	1,548	1,910	2,022	2,189
market sale	710	893	902	1,062	1,128	1,226
shared ownership	57	83	100	136	147	164
social/affordable rent	351	408	546	712	747	799

Retirement/sheltered housing:

For Oxfordshire estimated need to 2044 is c.7,045 homes of which c.2,215 homes are estimated to be required for social/affordable rent and c.4,125 are estimated to be required for open market sale and c.705 for shared ownership.

Extra care housing:

For Oxfordshire estimated need to 2044 is c.2,190 homes of which c.800 homes are estimated to be required for social/affordable rent and c.1,225 homes are estimated to be required for market sale and c.165 for shared ownership

This is intended to meet the housing and care needs of older people who are self-funders as well as older people who need rented housing and are eligible for social care funded by the Council.

Care home beds

From the OCC current Adult Market Position Statement it is clear that there is an expectation that OCC's and the NHS's requirements for care home beds will be met by existing capacity, with the likely need to refocus existing care home capacity on people with the most complex care and health needs. This strategic 'direction of travel' has been corroborated through discussions with OCC Officers.

OCC intendeds to undertake a detailed assessment of the estimated need for care home bed capacity and to publish this evidence separately from this Specialist and Supported Housing Needs Assessment.

Estimated need for supported accommodation: Adults with learning disability/autistic people

In summary, for Oxfordshire it is estimated that:

- an additional c.50 units of supported housing and c.10 shared lives places are needed by 2029.

- an additional c.100 units of supported housing and c.20. shared lives places are needed by 2034 (this includes estimated need to 2029).
- an additional c.150 units of supported housing and c.30. shared lives places are needed by 2039 (this includes estimated need to 2029 and 2034).

Estimated need for supported housing: Adults with serious mental health needs

In summary, for Oxfordshire it is estimated that:

- An additional c.100 units of supported housing are needed by 2029;
- An additional c.210 units of supported housing are needed by 2034 (this includes estimated need to 2029).
- An additional c.330 units of supported housing are needed by 2039 (this includes estimated need to 2029 and 2034).

Estimated need for accessible housing: Adults with physical disabilities

The table below shows the estimates of need for fully wheelchair adapted homes and accessible homes for Oxfordshire to 2034, 2039 and 2044.

Need for accessible homes and fully wheelchair adapted homes in Oxfordshire by 2039 and 2044

Type of accessible / adapted home	Estimated need (homes) (2034)	Estimated need (homes) (2039)	Estimated need (homes) (2044)
Accessible homes	16,588	24,881	33,175
Working age adults (18-64)	6,635	9,952	13,270
65+	9,953	14,929	19,905
Fully wheelchair adapted homes	1,130	1,694	2,259
Working age adults (18 -64 years)	452	678	904
65+	678	1,016	1,356

In summary, by 2044, it is estimated that the need for accessible housing will be:

- c.33,200 *accessible homes* (i.e. not fully wheelchair adapted dwellings), similar to Part M(4) Category 2, broadly equivalent to the Lifetime Homes standard.
- This is the equivalent of a need for c.1,660 accessible and adapted homes required per year to 2044 for the all-age population.
- Among the working-age population, this is the equivalent of a need for c.664 accessible and adapted homes required per year to 2044.
- c.2,260 *fully wheelchair adapted homes*, i.e. similar to Part M(4) Category 3 broadly equivalent to the Wheelchair Housing Design standard.

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- This is the equivalent of a need for c.113 fully wheelchair-adapted homes required per year to 2044, for the all-age population.
- For the working age population, this is the equivalent of a need for c.45 fully wheelchair-adapted homes required per year to 2044.

It is anticipated that estimated need for accessible homes would be met through a mix of adaptations to existing homes (both self-funded and funded through Disabled Facilities Grants) and from new build housing, both social and market housing, built to M4(2) and M4(3) standards.

Estimated need for supported housing: Vulnerable young people, particularly care leavers

In summary, for Oxfordshire it is estimated that:

- An additional need for 90 units of supported housing over the next 5 years will satisfy demand for supported housing capacity (equivalent to an additional 18 units per annum over the five years to 2029).
- However, it is important to note that need for short term supported housing is affected by the level of move-on or 'throughput'. For example, if the average length of stay in young people's supported housing was reduced from 24 months to 18 months, the estimated additional supported housing requirements would decrease.
- An additional c.65 units of mainstream move-on housing per annum are required.

1. Introduction

- 1.01 This is a report of research undertaken by the Housing Learning & Improvement Network (LIN)¹ for Oxfordshire County Council (OCC) to provide a Specialist and Supported Housing Needs Assessment.
- 1.02 OCC has commissioned the Housing LIN to undertake an assessment of the future need, over the next 10-20 years, for specialist and supported housing and accommodation.
- 1.03 The scope of this specialist housing, supported housing and accessible housing need assessment includes:
- Older people (55+ years).
 - Adults with a learning disability/Autistic people; including children/young people living with their families who are likely to 'transition' to eligibility to adult services.
 - Adults with mental health needs.
 - Adults with physical disabilities/long term conditions.
 - Vulnerable young people (specifically care leavers).
- 1.04 Whilst the assessment is shown in relation to 'client cohorts', it is recognised that people's needs are often complex and that innovative approaches to housing and support that go beyond these 'cohort' definitions will be required and indeed desirable:
- An assumption that mainstream housing suitably designed and/or adapted will be appropriate for many people with care and/or support needs.
 - Housing solutions may be multi-functional, e.g. providing a mix of mainstream housing, supported housing and potentially other facilities.
 - All housing and supported accommodation for people with care and/or support needs should assist and facilitate inclusion in community life.
- 1.05 OCC wishes to use this evidence base to inform its supported housing strategy and its other housing, planning, social care, investment and delivery plans. The council's objective is to support people with care/support needs to live independently in their homes through having a range of specialist and supported housing options available which enables this to happen. OCC will also use this report to inform its discussions with the City and District Councils about provision for specialist and supported housing.

¹ www.housinglin.org.uk

Approach and method

- 1.06 This specialist and supported housing need assessment covers a range of housing and accommodation types for the groups of people shown above at paragraph 1.03.
- 1.07 Estimates of need for supported, specialist and accessible homes, as appropriate for each of the cohorts at paragraph 1.03, are produced for the next 10 years to 2034. These are extrapolated forward to 2044 for cohorts with larger populations (in relation to specialist housing for older people and accessible homes for people with physical disabilities) and extrapolated forward to 2039 for cohorts with relatively small populations (adults with a learning disability/Autistic people; adults with mental health needs). In relation to vulnerable young people (specifically care leavers) where the need is for short term supported accommodation and the population is relatively small, need for supported housing and 'move-on' housing is estimated over the next 5 years to 2029.
- 1.08 Where appropriate estimates of housing need are indicated for different tenure types.
- 1.09 Where the size of the relevant cohort populations permits, estimates of future specialist/supported housing and accessible housing need are shown at Oxfordshire level and at District/City Council level.
- 1.10 Qualitative evidence from a range of stakeholders has been used to inform estimates of supported housing need.
- 1.11 A range of national and local quantitative evidence has been used to inform estimates of need for specialist and supported housing including:
- National and local health, social care and housing data.
 - Current population data for the relevant cohorts.
 - ONS Census data and other ONS demographic data as applicable.
 - Relevant local plans and strategies in relation to the population cohorts.
- 1.12 Quantitative estimates of need for specialist housing and accommodation for older people should be treated as a guide to future need The Housing LIN strongly recommends using local qualitative research to triangulate and corroborate quantitative estimates of need for specialist and supported housing.

Context

National context

- 1.13 There are a number of national policy factors affecting the supported housing sector and which will influence the delivery of this strategy.

- 1.14 In October 2020 the Government published the *Supported housing: national statement of expectations*². This set out the expectations of local authorities and of providers of supported housing in relation to, for example, understanding the need for supported housing and ensuring that supported housing is of a good quality, both in terms of the accommodation and the service. This was for guidance only, however since this was published, the Government has set out its intention to legislate to deliver improvements in supported housing.
- 1.15 The Government has established the Supported Housing Improvement Programme (SHIP)³ and made available funding to a number of Councils to deliver this programme locally. The programme is intended to support Councils to improve the quality of supported housing, both the accommodation and support services, through greater local scrutiny.
- 1.16 The Supported Housing (Regulatory Oversight) Act⁴ from 2023 makes provision for the regulation of supported exempt accommodation, and makes provision about local authority oversight of, and enforcement powers relating to, the provision of supported exempt accommodation. The Councils in Oxfordshire have new statutory powers and duties to regulate supported housing locally.
- 1.17 Over recent years long lease-based models of supported housing have come under scrutiny by the Regulator of Social Housing, particularly the governance and financial arrangements of some Registered Providers that lease all or most of their supported housing stock from other organisations. The Council will take account of the regulatory status of providers of supported housing in its approach to managing the quality of supported housing services.
- 1.18 Government policy on Housing for older and disabled people⁵ guides Councils in preparing planning policies on housing for older and disabled people.

Oxfordshire context

- 1.19 OCC has a strategic focus to ensure that communities thrive and residents can lead healthy, independent lives, and it recognises there is increasing demand for specialist supported housing driven by the evolving care needs of a growing population.
- 1.20 One of the priorities of OCC's 'Oxfordshire Way' adult social care vision is to improve housing options for adults with complex long-term conditions. The Oxfordshire Way

²<https://www.gov.uk/government/publications/supported-housing-national-statement-of-expectations/supported-housing-national-statement-of-expectations>

³<https://www.gov.uk/government/publications/supported-housing-improvement-programme-prospectus/supported-housing-improvement-programme-prospectus#:~:text=The%20Supported%20Housing%20Improvement%20Programme%20is%20an%20England%2Dwide%20funding,20%20million%20revenue%20funding%20available.>

⁴<https://bills.parliament.uk/bills/3195#:~:text=A%20Bill%20to%20make%20provision,accommodation%3B%20and%20for%20connected%20purposes.>

⁵ <https://www.gov.uk/guidance/housing-for-older-and-disabled-people>

approach to promoting independence, helping people stay well in their community, and keeping fit and healthy for as long as possible relies on appropriate housing, and this assessment provides a crucial evidence base to ensure that specialist supported housing is developed.

- 1.21 The Buckinghamshire, Oxfordshire and Berkshire West Integrated Care Partnership Integrated Care Strategy recognises the importance of housing and the direct impact it can have on people's health and wellbeing. Through this assessment, OCC can ensure it is best placed to support the realisation of these ambitions, ensuring that new housing developments appropriately reflect the needs of an empowered population, and reduce the risk of poor health and dependence.
- 1.22 Ensuring there are sufficient housing options that meet the range of needs considered in this assessment is crucial in reducing reliance on more intensive, costly forms of care. OCC recognises the role appropriate housing plays in this, including extra care housing as an alternative to some residential care home beds.
- 1.23 Crucial to the successful delivery of appropriate housing options is the positive relationship between OCC and the District and City Councils in Oxfordshire and OCC recognises each will have produced their own evidence bases for general and specialist housing needs.
- 1.24 Developers of specialist and supported housing should also refer to evidence produced by the District and City Councils in Oxfordshire in relation to need for specialist accommodation, for example from supporting evidence for Local Plans and for local housing strategies.
- 1.25 The District Councils and City Councils in Oxfordshire have also developed local evidence in relation to the need for some types of specialist housing, specifically in relation to specialist age designated housing (such as retirement/sheltered housing and extra care housing).
- 1.26 Cherwell District Council and Oxford City Council commissioned Icenii to produce, in 2022, a housing and economic needs assessment which contains estimates of need for specialist age designated housing.
- 1.27 South Oxfordshire and Vale of White Horse District Councils have commissioned ORS in 2024 to undertake a strategic housing market needs assessment which includes estimates of need for specialist age designated housing.
- 1.28 West Oxfordshire District Council has commissioned ORS in 2024 to undertake a strategic housing market needs assessment which includes estimates of need for specialist age designated housing.
- 1.29 Developers of specialist housing and accommodation for older people should consult in the first instance with the relevant District/City Council and with OCC about any development proposals they wish to pursue.
- 1.30 Where the estimates of need for specialist age designated housing differ between this Specialist and Supported Housing Needs Assessment and the estimates produced by

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the District Councils and City Councils in Oxfordshire, estimates of need for market/private retirement housing and market/private extra care housing produced by the District Councils and City Councils should be considered to have greater weight than the estimates of need for market/private retirement housing and extra care housing in this Specialist and Supported Housing Need Assessment. Developers of private retirement housing and extra care housing should discuss their proposal/s with the appropriate District/City Council in the first instance.

2. Assessment of the need for supported and specialist housing and accommodation for older persons

- 2.01 The intention of this assessment is to identify the need for different types of supported and specialist housing suited to older people (covering the 4th, 5th and 6th bullet points below). However, it is recognised that overall housing need amongst the older population will cover a range of needs and housing options including:
- Remaining in a person's existing home.
 - Remaining in existing homes with adaptations.
 - Moving to another conventional home with or without adaptations.
 - Moving to retirement/sheltered housing (age-designated housing).
 - Moving to extra care housing (age-designated housing).
 - Moving to residential and nursing care homes.
- 2.02 The assessment of need for housing and accommodation suited to the needs of older persons draws on a range of evidence, including:
- Demographic context: current population and projected population of older people.
 - Current provision of specialist housing and accommodation for older people.
 - Local stakeholder perspectives and intelligence.
 - Older people's housing preferences and likelihood of moving. This is based on evidence from a survey conducted by Ipsos for the Housing LIN in December 2023 of a representative sample (c.5,600 people) of the UK's 50+ population.

Baseline population and projections

Demographic projections

- 2.03 The ONS 2021 census⁶ is used to provide baseline projections for Oxfordshire's older populations.
- 2.04 The ONS subnational population projections⁷ are used to project future changes in the older populations.
- 2.05 Oxfordshire's 55+ population, 65+ population and 75+ populations are projected to grow significantly over the next 10-20 years.

⁶ ONS 2021 census - P01: Usual resident population by sex, local authorities in England and Wales

⁷ ONS 2018-based subnational principal population projections for local authorities and higher administrative areas in England

2.06 Table 1 shows the projected change in the 55+, 65+ and 75+ population for Oxfordshire by District to 2044.

Table 1. Projected population of people aged 55+, 65+ and 75+ in Oxfordshire to 2044

Age cohort	Local authority	2021	2024	2029	2034	2039	2044
55+	Cherwell	48,400	51,541	55,733	58,564	61,855	65,824
	Oxford	33,700	34,987	36,517	37,340	38,115	39,429
	South Oxfordshire	50,300	52,943	56,347	58,247	60,410	63,479
	Vale of White Horse	45,300	48,058	52,027	55,085	58,346	62,106
	West Oxfordshire	40,400	42,773	46,059	47,834	49,611	52,480
	Oxfordshire	218,100	230,302	246,683	257,069	268,338	283,318
65+	Cherwell	28,100	30,060	34,168	38,132	40,886	44,229
	Oxford	19,100	19,953	21,928	23,703	24,830	26,320
	South Oxfordshire	30,500	32,120	35,247	38,400	40,718	43,371
	Vale of White Horse	27,500	29,419	33,073	36,603	39,243	42,350
	West Oxfordshire	24,700	26,394	29,940	33,049	35,272	38,013
	Oxfordshire	129,900	137,946	154,356	169,885	180,947	194,284
75+	Cherwell	13,000	14,816	16,566	18,447	21,047	23,205
	Oxford	9,000	9,751	10,637	11,538	12,897	13,860
	South Oxfordshire	15,000	16,952	18,490	19,860	21,840	23,865
	Vale of White Horse	13,200	15,101	16,967	18,691	21,001	23,153
	West Oxfordshire	12,000	13,704	15,408	14,280	16,512	17,316
	Oxfordshire	62,200	70,324	78,068	82,816	93,297	101,399

Source: ONS census 2021; ONS 2018-based subnational population projections

2.07 The population aged 55+ in Oxfordshire is projected to rise by c.23% between 2024 and 2044. This represents an additional 53,016 population in the 55+ age group. Changes at District level from 2024 to 2044 are summarised below.

- Cherwell: Increase from 51,541 to 65,824, a 27.7% increase.

- Oxford: Increase from 34,987 to 39,429, a 12.7% increase.
 - South Oxfordshire: Increase from 52,943 to 63,479, a 19.9% increase.
 - Vale of White Horse: Increase from 48,058 to 62,106, a 29.2% increase.
 - West Oxfordshire: Increase from 42,773 to 52,480, a 22.7% increase.
- 2.08 Oxfordshire's population aged 65+ is projected to grow by c.41% between 2024 and 2044. This equates to an increase of 56,338 people in the 65+ age group. Changes at District level from 2024 to 2044 are summarised below.
- Cherwell: Increase from 30,060 to 44,229, a 47.1% increase.
 - Oxford: Increase from 19,953 to 26,320, a 31.9% increase.
 - South Oxfordshire: Increase from 32,120 to 43,371, a 35.0% increase.
 - Vale of White Horse: Increase from 29,419 to 42,350, a 44.0% increase.
 - West Oxfordshire: Increase from 26,394 to 38,013, a 44.0% increase.
- 2.09 Oxfordshire's population aged 75+ is projected to increase by approximately c.44.2%, representing an increase of 31,075 people in the 75+ age group. Changes at District level from 2024 to 2044 are summarised below.
- Cherwell: Increase from 14,816 to 23,205, a 56.6% increase.
 - Oxford: Increase from 9,751 to 13,860, a 42.1% increase.
 - South Oxfordshire: Increase from 16,952 to 23,865, a 40.8% increase.
 - Vale of White Horse: Increase from 15,101 to 23,153, a 53.3% increase.
 - West Oxfordshire: Increase from 13,704 to 17,316, a 26.4% increase.
- 2.10 By contrast, the 18-64 years population in Oxfordshire is projected to decrease by 2.1% from 2021 to 2044, with notable declines in Oxford (-5.1%) and West Oxfordshire (-4.8%).

Current provision of specialist supported housing for older people

- 2.11 Information on the existing provision is drawn from the Elderly Accommodation Counsel's (EAC)⁸ national database of older people's specialist housing provision, data from the Care Quality Commission⁹ and data from OCC. This includes social and private sector age designated specialist housing.
- 2.12 The following definitions of *specialist* older people's housing and accommodation are used to describe the different types of housing and accommodation for older people:

⁸ Elderly Accommodation Counsel - 2019

⁹ Care Quality Commission Directory (August 2023)

- *Retirement/Sheltered Housing*: sheltered/retirement housing for social/affordable rent and private sector retirement housing for sale:
 - *Sheltered housing and other age designated housing for social/affordable rent*: These schemes typically offer self-contained accommodation commonly available for social/affordable rent. They are usually supported by a part-time/visiting scheme manager and 24-hour emergency help via an alarm. There are often communal areas and some offer activities. Most accommodation is offered is for social or affordable rent, based on need, by social landlords (councils or housing associations) and charitable providers. This category may also include what some social landlords may refer to as 'age designated housing' where the housing is exclusively for people over a specific age (typically 55 or 60 years) but there may not be the communal facilities and staff assistance found in sheltered housing, however these distinctions may vary between schemes and social housing providers.
 - *Private sector retirement housing*: This is typically similar to sheltered social housing, but it is usually built by private developers for market sale and sometimes for market rent. Once all the properties have been sold, the scheme is sometimes run by a separate management company that employs a scheme manager and organise maintenance and other services.
- *Extra care housing*: Often referred to as 'extra care housing' when provided by housing associations and local authorities (for affordable rent and sometimes shared ownership) and 'assisted living' or 'retirement village' or 'integrated retirement community' by private sector providers (for market sale and sometimes market rent). Extra care housing is designed for older people, typically with higher levels of care and support needs. Residents live in self-contained homes. It typically has more communal facilities (compared to sheltered/retirement housing) access to on-site 24/7 care services, a scheme manager and a support staff.
- *Residential care home*¹⁰: a residential setting where older people live, usually in single rooms, and have access to on-site social care services. 24/7 onsite personal social care services include help with washing and dressing. Residential care homes do not consist of self-contained units. There are no tenure rights; weekly/monthly fees are paid directly by the resident (or by a Council or the NHS if the person is eligible) to the care home provider.
- *Nursing care home*¹¹: similar to a residential care home, but additionally providing care from qualified nurses. There will always be 1 or more qualified nurses on duty to provide nursing care. These are sometimes called 'care homes with nursing'. The Care Quality Commission states that (in addition to a residential care home), "qualified nursing care is provided, to ensure that the full needs of the person using the service are met." Nursing care homes do not consist of self-contained units.

¹⁰ [NHS: Care homes](#)

¹¹ [NHS: Care homes](#)

There are no tenure rights; weekly/monthly fees are paid directly by the resident (or by a Council or the NHS if the person is eligible) to the care home provider.

- 2.13 Table 2 below shows the existing specialist housing (retirement/sheltered housing and extra care housing) level of provision and its Chartered Institute of Public Finance and Accountancy (CIPFA) comparator authorities and for England.
- 2.14 Oxfordshire currently has a higher prevalence of extra care housing compared to both the average amongst its CIPFA comparator local authorities and compared with the all England average. Oxfordshire currently has a lower prevalence of retirement/sheltered housing compared to the average amongst its CIPFA comparator local authorities but is in line with the all England average.

Table 2. Current (2024) provision of retirement/sheltered housing and housing with care (units) in Oxfordshire and each of its CIPFA comparator local authorities

Local Authority	Retirement / sheltered housing (units)			Extra care housing (units)			
	Open market sale** / shared ownership			Rent*		Total	Prev.
	Total	Prev.					
Rate per 1000	Open market sale** / shared ownership			Rent*	Total	Prev.	
Rate per 1000							
Oxfordshire	3,040	3,801	6,841	50	558	731	1,289
	18						
Cambridgeshire	1,929	7,403	9,332	70	125	1,154	1,279
	18						
Essex	7,521	13,721	21,242	66	172	819	991
	6						
Gloucestershire	4,055	6,205	10,260	69	575	782	1,357
	18						
Hampshire	9,371	15,047	24,418	76	1,112	1,251	2,363
	14						
Hertfordshire	4,907	9,263	14,170	66	682	716	1,398
	13						
Kent	6,616	11,176	17,792	53	401	1,521	1,922
	11						
Leicestershire	2,188	6,759	8,947	57	284	422	706
	9						
North Yorkshire	3,099	14,691	17,790	109	697	1,328	2,025
	25						
Somerset	5,672	14,703	20,375	135	673	2,150	2,823
	37						
Suffolk	1,961	4,933	6,894	36	179	597	776
	8						

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Surrey	7,065 5	7,427	14,492	61	384	289	673
Warwickshire	2,175 15	5,463	7,638	59	386	629	1,015
West Sussex	6,230 7	5,880	12,110	57	251	530	781
Worcestershire	2,336 15	5,930	8,266	57	274	826	1,100
CIPFA Comparator average		4,544	8,827	13,371		68	436
	917	1,354	15				
England	151,683 11	432,391	584,074	52	13,629	46,176	59,805

Source: OCC, Elderly Accommodation Counsel & ONS 2021 census / 2018-based SNPP

N.B. Prev. denotes prevalence rate – the number of units per 1,000 population aged 65+ (retirement/sheltered housing) and 75+ (for extra care housing)

*Affordable and social rent. **Sometimes market units are offered for market rent in addition to market sale.

2.15 The existing provision of extra care housing (units)¹² for each district authority in Oxfordshire, is shown in Table 3 below. Further detail is provided at Annexe 1.

Table 3. Existing provision of extra care housing (units), for each district authority in Oxfordshire.

District Authority	Open market sale (units)	Shared ownership (units)	Affordable and social rent (units)	Total (units)
Cherwell	101	87	180	368
Oxford City	0	18	126	144
South Oxfordshire	113	67	128	308
Vale of White Horse	0	53	172	225
West Oxfordshire	78	41	125	244
Total	292	266	731	1,289

Source: OCC/EAC (2024)

*Sometimes market units are offered for market rent in addition to market sale.

The mix and range of housing and accommodation needed to meet older people's needs: Evidence from older people

Housing LIN and Ipsos: Market research with 5,600+ older people aged 50+ in the UK (2024)

¹² Based on internal data provided by OCC and data from the Elderly Accommodation Counsel.

- 2.16 The Housing LIN commissioned market research¹³ (funded by UK Research & Innovation) from Ipsos to determine the future housing preferences of the older population in the UK. This included the experiences, housing preferences and requirements of people who are currently aged 50+, i.e. the current and next generation of older people. Ipsos carried out the research and surveyed 5,591 UK adults aged 50+ (December 2023). The survey respondents were representative of the overall 50+ population in terms of age cohorts (50-64; 65-74; 75+), gender, tenure and other demographic characteristics.
- 2.17 It is the most up to date and largest survey of the UK's 50+ population about their future housing preferences and likelihood of moving.
- 2.18 Key messages from the survey include the following:
- Almost half the respondents have lived in their current home for more than 20 years.
 - Around a quarter of respondents live with their children.
 - Only around a quarter of respondents have a downstairs bathroom/shower room.
 - Over a third of respondents worry that their current home will be too expensive to keep warm in winter.
 - Over half said that if their current homes were better adapted, this would make them more suitable to meet their future needs.
 - Most people who moved into their current home in the last 5 years moved to either be in a more suitable home or to be in a better neighbourhood/more pleasant area.
 - A small proportion of respondents, 1%, said that a home being wheelchair accessible was important to them personally in thinking about what makes a good home.
 - As time progresses, the perceived likelihood that the person will move to a new home increases, suggesting it is seen as a consideration for the future rather than for now.
 - A quarter of respondents said that staying in their current home without any adaptations was most likely to meet their future housing needs.
 - The most significant barrier to moving in the future was a personal attachment to their current home.

Findings from previously conducted research by the Housing LIN with older people about their housing preferences

- 2.19 Existing evidence regarding the housing perspectives of older people has been drawn from the Housing LIN's qualitative research (unpublished) with c.2,500 older people across England between 2018 and 2023.

¹³ Housing LIN (to be published autumn 2024): Housing preferences for older people: A survey of 5,600+ older people across the UK carried out by Ipsos for the Housing LIN.

- 2.20 The key messages from this evidence are summarised below.
- 2.21 Older people are a diverse group with different views, experiences, and opportunities that influence where they might wish to live in later life. The range of housing types available needs to reflect this diversity.
- 2.22 The majority of older people would prefer to remain living in their existing homes rather than move to 'specialist' accommodation. People are seeking support to remain living where they are now such as with adaptations, aids, technology to support independence as well as care/support staff if appropriate.
- 2.23 However, some older people are interested in and willing to 'rightsize/downsize' provided that an alternative home is sufficiently attractive and meets their requirements.
- 2.24 People are seeking properties that:
- Adapt to their changing needs in their later years.
 - Provide good quality, affordable accommodation with less maintenance and upkeep requirements.
 - Provide spacious, modern accommodation with a sense of community.
- 2.25 Moving to properties with an age-designation tends to be a 'marmite issue'; for some people it is their preference whereas others would prefer to live in a mixed-age community.
- 2.26 If they were to move, the majority of people (particularly home-owners) would prefer a property with 2 bedrooms; where only 1 bedroom is provided there needs to be provision of sufficient storage space.
- 2.27 More people are likely to consider moving to specialist accommodation if it is affordable, aspirational, and accessible and meets the requirements summarised above.
- 2.28 Older people from rural areas tend to be more connected to their local communities/area and often find a move (typically to a more urban setting) more of an upheaval. Therefore, people from rural areas are seeking a housing offer that is provided locally, i.e. in more rural areas, or a housing offer that is sufficiently attractive enough to encourage them to move from their existing home.
- 2.29 Older people are seeking housing options that enable them to live independently for as long as possible. Very few older people want to move into a care home.
- 2.30 Older people are seeking access to better information and advice about their future housing and support options. People need help to weigh up the cost implications of moving and to understand the affordability of different alternative housing options. There need to be opportunities to access this information both on and offline.

2.31 Recent evidence from the Centre for Ageing Better^{14,15,16} has shown, nationally that:

- More than half (53%) of people aged 50 and over who move home don't downsize. They either keep the same number of rooms or move into a place with more rooms¹⁷.
- Among people aged 50 or older, the most commonly desired features of a new home are safety, a private outdoor space and for it to be within walking distance of shops, the GP and other amenities¹⁸.
- There is a gap between the housing aspirations of many older people and the choices available to them.
- Moving home is challenging - financially, emotionally, physically. The process is costly and time-consuming. Accessible homes are in short supply.
- Location and access to communities are as important as property features for many older people considering a move.
- Many older people want mainstream housing in existing communities, as well as specialist accommodation.
- Improving existing homes through repairs, adaptations and energy efficiency upgrades is as important alongside the development of new homes.
- Older people have diverse needs and motivations for moving or staying put. A "one size fits all" approach does not work, for example assuming that all older people who wish to move will want to 'downsize' into specialist housing for older people.

The type and mix of housing and accommodation required by older people: Drawing on housing good practice

2.32 Contemporary good practice examples reflect the types of 'aspirational' homes that respond to the needs and expectations of current and future older people in England. To account for a diverse range of older people, good practice evidence suggests a range of housing choices from age-designated properties to intergenerational housing and housing with care to 'care-ready' housing.

2.33 The HAPPI¹⁹ (Housing our Ageing Population: Panel for Innovation) principles are increasingly recognised as the standard design principles by those developing more

¹⁴ Centre for Ageing Better: Living Longer: Infographics; based on 'State of Ageing 2022'

¹⁵ Centre for Ageing Better: Locked out – A new perspective on Older People's housing choices; August 2023.

¹⁶ Centre for Ageing Better: Finding the right place to grow older: Improving housing choices for older people; August 2023.

¹⁷ Greater Manchester Combined Authority (2018) Rightsizing: Reframing the housing offer for older people.

¹⁸ Centre for Ageing Better & NatCen Panel Homes and Communities Study 2020.

¹⁹ <https://www.housinglin.org.uk/Topics/browse/Design-building/HAPPI/>

lifestyle, aspirational orientated sheltered/retirement housing and extra care housing for rent and sale. These tend to underpin best practice and have also been applied to non-age designated housing settings.

- 2.34 Good practice also adheres with the more recent TAPPI²⁰ (Technology for our Ageing Population: Panel for Innovation) principles. Born from the 'adaptable and care-ready' HAPPI principle, it focuses on the need to provide technology that supports independence in the home that is co-produced, preventative, interoperable with other devices and cost-effective. For example, Blackwood Housing CleverCogs™²¹ customisable digital system enables residents to access many of Blackwood's services online using a tablet-based app.
- 2.35 Age-designated housing, both retirement housing and extra care housing, that reflects best practice is focused on providing an aspirational housing offer that adheres to HAPPI and TAPPI principles and is designed and marketed as a 'lifestyle' offer rather than being associating with ageing or care. For example, Guinness's latest extra care housing development, Quayside²² located in Totnes close to the River Dart provides 30 apartments for shared ownership and 30 for affordable rent. The communal facilities include a café bistro, activity areas, and a 'pamper suite' where residents can arrange haircuts, manicures, and beauty treatments. The internal decor and layout are designed to be dementia friendly but in a way that is attractive and luxurious. There is no large communal lounge; rather, smaller sitting areas take advantage of the views from the site.
- 2.36 Many housing providers are starting to consider what a contemporary version of sheltered housing looks like. Branded mainly as 'retirement housing' or 'independent living' it is focused on creating 'care-ready'²³ housing. i.e., housing that adapts to an individuals' needs in later life. It provides a 'hotel style' look and feel that more closely resembles a more modern extra care scheme (but without the provision of onsite care). Where it has been designed well, adhering to HAPPI principles means it isn't obvious that the scheme is designated for older people. For example, Bruyn's Court²⁴ in Thurrock has 25 flats, all of which are flexibly designed to adapt to meet the changing needs of residents as they grow older. The scheme does not provide care and support services, but the aim of the scheme is to radically improve the standard of living for older people in Thurrock, taking account of their social and physical needs, and encouraging social interaction and mutual support.

²⁰ <https://www.housinglin.org.uk/Topics/browse/Design-building/tappi/>

²¹ <https://www.blackwoodgroup.org.uk/clevercogs>

²² <https://www.guinnesspartnership.com/development/quayside-totnes/>

²³ Care ready housing typically means that a home is capable of adaptation over time to meet changing needs including space for aids and adaptations. Through good design homes can be built to be better suited to possible future requirements such as the need to have an over-night carer, storage for mobility scooters and space to retain independence.

²⁴ <https://www.housinglin.org.uk/Topics/ECHScheme/search/Bruyns-Court/>

- 2.37 'Care-ready' housing principles have also been applied to non-age designated housing creating mainstream flexible living spaces to suit residents' changing needs. For example, Igloo's +Homes²⁵ 'care readiness' is demonstrated by its flexible and customisable build, meaning they can meet every occupier's individual needs during their lifetime. As well as being equipped with the infrastructure to provide smart and connected homes.
- 2.38 The development of new 'intergenerational housing' schemes recognises that not all older people want to live in age-designated communities. 'Intergenerational' models vary in type and size but in more rural areas tend to be more sensitive to the local rural vernacular. For example, in Ramsgate, Kent, Jentex Village²⁶ provides a mixed community within a rural setting that places a 56-unit extra care scheme among a mixed house-type development of 25 family houses and 31 houses for older people. Using an array of cottages and bungalows it received unanimous approval, for the regeneration of an oil depot site on the edge of Ramsgate. Intergenerational housing has also been applied to 'cohousing' contexts to create a cooperative community from a range of ages that can look out for one another. For example, Marmalade Lane²⁷ in Cambridge, comprises 42 homes; a mix of 2- to 5-bedroom terraced houses and 1- and 2- bedroom apartments. The focus is on creating a sense of community alongside high-quality housing which can be applied to a rural context.

Estimated need for housing and accommodation suited to older persons

- 2.39 The model used for estimating need for different types of specialist housing (as set out in para 2.12) for the older population is based on the use of evidence from primary research with a representative sample of the UK's older population. This is based on evidence from a survey conducted by Ipsos for the Housing LIN of a representative sample (c.5,600 people) of the UK's 50+ population (survey conducted in December 2023; research to be published in autumn 2024).
- 2.40 In addition, a range of local contextual data is considered in relation to the potential implications for future need for specialist housing for older people.

Contextual evidence

- 2.41 Approximately 80% of people aged 65+ in Oxfordshire are homeowners²⁸, shown in table 4 below.
- 2.42 Compared to England (76% of people aged 65+ are homeowners), Oxfordshire has a higher percentage of people aged 65+ who are homeowners. However, amongst the cohort aged 45-64 years in Oxfordshire (the next generation of older people), the

²⁵ <http://www.iglooregeneration.co.uk/2020/12/04/igloo-joint-winner-home-of-2030-competition/>

²⁶ <https://rm-architects.com/jentex>

²⁷ <https://www.marmaladelane.co.uk/>

²⁸ ONS Census 2021: Tenure by age – Household Reference Persons

tenure breakdown is c.70% are homeowners and c.30% are renting in the social housing and private rented sectors.

Table 4. Tenure for people aged 65+ in Oxfordshire

Tenure category	Number of people	% of total
Ownership: owns with a mortgage/ shared ownership & owns outright	107,817	83%
Social rented	14,289	11%
Private rented	7,794	6%
Total	129,900	100%

Source: ONS 2021 census

Table 5. Deprivation among older people (IDAOP)²⁹ scores for Oxfordshire, its CIPFA comparator local authorities and the English average.

Ranking (among Oxfordshire's CIPFA comparator authorities)	Local authority	IDAOP score (%)
Least Deprived		
1	Surrey	7.3%
2	Oxfordshire	8.1%
3	Hampshire	8.6%
4	Leicestershire	9.2%
5	West Sussex	9.5%
6	Cambridgeshire	9.6%
7	Gloucestershire	9.8%
8	Hertfordshire	9.9%
9	Warwickshire	10.4%
10	Suffolk	10.4%
11	Worcestershire	10.7%
12	Essex	11.3%
13	Nottinghamshire	11.4%
14	Kent	11.6%
-	England average	14.2%
Most deprived		

Source: DLUHC (2022)

- 2.43 Oxfordshire is ranked second least deprived with an IDAOP score of 8.1% and is considerably less deprived than the English average as shown in Table 5.
- 2.44 This evidence, in relation to both tenure mix and relative deprivation amongst older people, is used to inform assumptions regarding the tenure breakdown of estimated need for specialist housing amongst older people. Given this evidence, estimates of future need are assumed to match the current tenure mix for the 65+ population, i.e. c.70% for open market sale (with 10% for shared ownership) and c.20% for social/affordable rent for retirement/sheltered housing and extra care housing.

²⁹ Index of Deprivation Affecting Older People (IDAOP)

However, by 2034 it is assumed that estimates of need are more likely to reflect the different tenure breakdown of the 'next generation' of older persons (the current 45-64 years cohort), i.e. a suggested tenure mix of c.60% for open market sale, 10% for shared ownership and c.30% for social/affordable rent for retirement/sheltered housing and extra care housing has been used. Estimates of need for shared ownership are based on affordability considerations in relation to age designated market housing and feedback from both commissioners and housing providers locally in relation to the evidence of relatively limited demand for shared ownership products amongst older people. However, the actual tenure split for new development of specialist retirement/sheltered housing and extra care housing will be dependent on the socio-economic profile of a locality. Shared ownership provided by social landlords in extra care housing and sheltered/retirement housing is intended to be an affordable housing product (as distinct from market sale), alongside a social/affordable rent product.

- 2.45 The number of people aged 65+ with dementia³⁰ is projected to increase in Oxfordshire by 2044³¹. The increasing incidence of dementia is a factor affecting likely need for extra care housing and care home beds. This is shown in table 6 below.

Table 6. Number of people 65+ with dementia and dementia prevalence as a percentage of the total 65+ population (2020).

Area	Number of people 65+ with dementia in 2020	Percentage of people 65+ with dementia out of total 65+ population	Growth rate p.a.	Projected number of people 65+ with dementia to 2044
Oxfordshire	5,321	4.00%	4.19%	10,667
CIPFA comparator average	7,420	3.84%	3.97%	14,497
South East	72,977	3.95%	3.94%	142,000
England	422,973	3.97%	3.62%	790,874

Source: OHID / ONS, NHS Digital (2020) & Wittenberg et al (2019)

- 2.46 It is notable that Oxfordshire has a higher projected annual growth rate of dementia compared to its CIPFA / regional comparator groups and England. This may be linked with Oxfordshire's higher growth rate in the 75+ population to 2044 compared with its comparator local authorities and England overall.
- 2.47 In terms of the health and care profile of the older population in Oxfordshire, the evidence indicates that average life expectancy is slightly below the average for the South East region, however it is higher than the England average; this is shown in table 7 below.

³⁰ NHS Digital (2020): Recorded Dementia Diagnoses publications

³¹ Wittenberg et al (2019): Projections of older people living with dementia and costs of dementia care in the United Kingdom, 2019-2040; LSE (CPEC)

Table 7. Life expectancy at birth³² and at age 65³³, for Oxfordshire, the South East region and England.

	Life expectancy at birth (years)	Life expectancy at 65 (years)
Oxfordshire	81.8	20.5
South East average	82.4	20.6
England	81.3	19.9

Source: OHID & ONS (2021)

Table 8. Health status of people aged 65+ living in Oxfordshire, according to the most recent (2021) census.

	'Very good' or 'good'	'Fair'	'Bad' or 'very bad'	Total
Number of people with self-reported health status (65+)	623,632	76,832	24,827	725,291
% of total counted	86%	11%	3%	100%

Source: ONS 2021 census

2.48 Table 8 shows that the health profile of Oxfordshire's older population is relatively healthy – with over 85% of older people reporting 'very good' or 'good' health status. This may influence an older person's decision to move into specialist housing for older people, i.e. amongst the small minority (3%) of older persons aged 65+ who report 'bad' or 'very bad' health who may opt to move to specialist housing for health-related reasons.

2.49 In relation to the impact of the Covid-19 pandemic, any assumptions based on emerging evidence are tentative given that the impact of the pandemic on the specialist housing and accommodation sector for older people is not yet fully clear. At this stage considerations based on tentative evidence could suggest in the medium to longer term, over the next 3-5 years:

- There is potential for a downward shift in preference for use of residential care amongst older people;
- There is potential for a preference amongst older people for remaining in their existing home, with care if required.

Estimating need for housing options for older people

³² Office for Health Improvement & Disparities (OHID) & ONS; Life expectancy at birth (3-year range, males and females)

³³ Office for Health Improvement & Disparities (OHID) & ONS; Life expectancy at 65 (3-year range, males and females)

- 2.50 Modelling of need for specialist housing suited to older people is based on a recent (December 2023) large scale nationally representative survey of c.5,600 older people aged 50+ in the UK³⁴ that the Housing LIN has undertaken with Ipsos.
- 2.51 The survey results have shown that amongst older people who express a likelihood to move in the future, there is a greater preference to move to other mainstream housing rather than to specialist housing such as retirement/sheltered housing and extra care housing.
- 2.52 An initial approach to using the survey data to model need for specialist housing for older people has been developed based on the survey findings in relation to the *expressed housing preferences* of older people and their stated *likelihood of moving* in the future. This modelling has been used to develop estimates of future specialist housing need. It should be noted that this modelling is subject to further refinement and development. Estimates of need at this stage are produced for specialist housing (retirement/sheltered housing and extra care housing) over the next 20 years. Further methodological detail is provided at Annexe 2.
- 2.53 An analysis of the survey results has been produced, which takes into account the following survey responses and variables:
- Older persons' likelihood of moving from their current accommodation within a 12-month period, within 1-2 years, within 3-5 years, and within 5-10 years;
 - Older persons' preference to move, disaggregated by accommodation type, specifically extra care housing and retirement/sheltered housing;
 - Age of the respondent;
 - Tenure status of the respondent;
 - The change in the projected population of older people.
- 2.54 Based on this survey data, specifically the stated housing preferences of older people and the stated likelihood of moving amongst older people, 'Transition Probabilities' (TPs) have been produced to estimate the predicted likelihood of people moving in a 12-month period, based on their age and their current tenure status, to generate a number of moves over the next 12 months, and subsequently the estimated number of moves over the next 5, 10, 15 and 20 years, equating to need for additional specialist housing units.
- 2.55 The TPs have been adapted to produce estimates of moves based on Oxfordshire's demographic trends, tenure make-up and age profile.
- 2.56 There are three sets of estimates shown in this analysis, which are based on the following assumptions and evidence:

³⁴ Housing LIN (2024, to be published in autumn 2024): Housing preferences for older people: A survey of 5,600+ older people across the UK carried out by Ipsos for the Housing LIN.

- Estimated moves – lower bound estimate (EML): This is based on the application from the Ipsos/Housing LIN survey of what respondents state is their *most realistic* likelihood of moving to specialist age designated housing (sheltered/retirement housing and extra care housing) projected forward for to 2029, 2034, 2039 and 2044. This takes into account the 65+ population growth over the period for sheltered/retirement housing and the 75+ population for extra care housing and the likely transitions/moves to specialist housing to 2029, 2034, 2039 and 2044.
- Estimated moves – upper bound estimate (EMU): This is based on the application from the Ipsos/Housing LIN survey of what respondents state is their *most preferred* likelihood of moving to specialist age designated housing (sheltered/retirement housing and extra care housing) projected forward for to 2029, 2034, 2039 and 2044. This takes into account the 65+ population growth over the period for sheltered/retirement housing and the 75+ population for extra care housing and the likely transitions/moves to specialist housing to 2029, 2034, 2039 and 2044.
- Both EML and EMU initial estimates are adjusted to allow for:
 - Estimated turnover within sheltered/retirement housing, i.e. capacity in existing provision that becomes available to meet need due to residents leaving/dying. Estimated annual turnover is assumed to be c.10%, based on the local knowledge and the Housing LIN's experience of specialist housing for older people.
 - Oxfordshire County Council's (OCC) policy objective of providing extra care housing as a genuine alternative to the use of residential care for some older people. It has been assumed that c.15% of people aged 65+ whom OCC would otherwise have funded to move to a residential care home, can be 'diverted' to move into extra care housing as an alternative; this would increase the need for affordable/social rented extra care housing by c.111 units at 2024 and each subsequent 5 year interval.
- Estimated moves – average trend (EMA): This produces estimates that take into account both the EML and EMU estimates and show the average of these two estimates. This produces a potentially more realistic set of estimates compared to the EMU and EML figures, and therefore is used as the headline estimate of need for age designated specialist housing to 2029, 2034, 2039 and 2044.

2.57 The age cohort from the Ipsos/Housing LIN survey used in relation to stated housing preferences and likelihood of moving is the population aged 65+ for sheltered/retirement housing and 75+ for extra care housing i.e. TPs and population projections are based on these age cohorts, as these cohort are identified from the Ipsos research as more likely to move to specialist housing than the 50-64 years cohort.

Estimates of future need for specialist housing for older people

- 2.58 The projected estimates of future need for housing and accommodation for older people are shown below³⁵. Estimates are shown for retirement/sheltered housing and for extra care housing.
- 2.59 This shows the projected need in terms of number of 'homes', equivalent to 'units' for retirement/sheltered housing and extra care housing.
- 2.60 The estimated need for retirement/sheltered housing and for extra care housing is shown for 2024 and projected by 2029, 2034, 2039 and 2044 in table 9 and 10. Estimated additional need is not cumulative.
- 2.61 It has been assumed that, based in part on the current tenure split amongst people aged 65+, the tenure split for future projected housing need to 2034 is:
- c.70% of the estimated need will be for market sale;
 - c.20% of the estimated need will be for social/affordable rent.
 - c.10% of the estimated need for shared ownership;
- 2.62 Given the differing tenure breakdown of the current population cohort aged 45-64 years compared with the current 65+ population, it has been assumed that the tenure split for future projected housing need from 2034 onwards is:
- c.60% of the estimated need will be for market sale;
 - c.30% of the estimated need will be for social/affordable rent.
 - c.10% of the estimated need will be for shared ownership;
- 2.63 However, in practice there are circumstances where shared ownership may have little demand amongst older people; in these circumstances the need for affordable retirement/sheltered housing and extra care housing should be considered to be the total of estimated need for shared ownership and social/affordable rent. This is likely in practice to increase need for social/affordable rent specialist housing.
- 2.64 Below are the average, upper and lower bound estimated moves/estimated need, EMA and EML and EMU respectively (see 2.56 for explanation).

Table 9. Estimated need for specialist housing for older people to 2044 in Oxfordshire (units).

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
EML (lower bound):					
Retirement/sheltered housing (units)	752	1,736	2,668	3,332	4,132
Extra care housing (units):	414	604	720	977	1,175
EMU (upper bound)					
Retirement/sheltered housing (units)	4,890	6,367	7,765	8,760	9,961

³⁵ It would be prudent to check, and potentially amend, estimates of need for specialist housing if future ONS population projections differ from the most recent release, e.g. following a future census.

Specialist and Supported Housing Needs Assessment

Extra care housing (units):	1,820	2,165	2,376	2,843	3,203
EMA (average)					
Retirement/sheltered housing (units)	2,821	4,051	5,216	6,046	7,046
Extra care housing (units):	1,117	1,384	1,548	1,910	2,189

N.B. The figures represent estimated number of likely moves into retirement/sheltered housing and extra care housing, which equate to the estimated number of units needed for the purpose of this analysis.

Table 10. Estimated need for specialist housing for older people to 2044 in Oxfordshire (units). (EMA estimates).

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2041	Estimated need by 2044
Retirement/sheltered housing (units)	2,821	4,051	5,216	6,046	6,446	7,046
market sale	1,934	2,777	3,054	3,540	3,774	4,126
shared ownership	282	405	522	605	645	705
social/affordable rent	605	869	1,640	1,901	2,027	2,216
Extra care housing (units)	1,117	1,384	1,548	1,910	2,022	2,189
market sale	710	893	902	1,062	1,128	1,226
shared ownership	57	83	100	136	147	164
social/affordable rent	351	408	546	712	747	799

Retirement/sheltered housing:

- 2.65 The estimated need to 2034 is c.5,215 homes of which c.1,640 homes are estimated to be required for social/affordable rent and c.3,055 are estimated to be required for open market sale and c.520 for shared ownership.
- 2.66 The estimated need to 2044 is c.7,045 homes of which c.2,215 homes are estimated to be required for social/affordable rent and c.4,125 are estimated to be required for open market sale and c.705 for shared ownership.

Extra care housing:

- 2.67 The estimated additional need to 2034 is c.1,545 homes of which c.545 homes are estimated to be required for social/affordable rent and c.900 homes are estimated to

be required for market sale and c.100 for shared ownership. This will meet the housing and care needs of older people who are self-funders as well as older people who need rented housing and are eligible for social care funded by the Council.

- 2.68 The estimated additional need to 2044 is c.2,190 homes of which c.800 homes are estimated to be required for social/affordable rent and c.1,225 homes are estimated to be required for market sale and c.165 for shared ownership. This will meet the housing and care needs of older people who are self-funders as well as older people who need rented housing and are eligible for social care funded by the Council.

Estimates of future need for specialist housing for older people by District

- 2.69 The overall estimates of need for specialist housing for older people for Oxfordshire, as shown in Table 10, have been disaggregated to estimate the proportion of this overall need for each of Oxfordshire’s five district authorities.
- 2.70 The ONS 2021 census³⁶ and 2018-based SNPP³⁷ for the population aged 65+ in Oxfordshire and each of its district authorities has been used to ‘pro rata’ these estimates of housing need, proportional to the relative sizes of each district’s 65+ population in relation to Oxfordshire’s total 65+ population.
- 2.71 The percentage composition of each district’s population aged 65+ in relation to Oxfordshire’s 65+ population is shown in table 11 below.

Table 11. Percentage of Oxfordshire’s 65+ population living in each District authority in 2021

District authority	Percentage of Oxfordshire’s 65+ population (2021 census)
Cherwell	21.8%
Oxford City	14.5%
South Oxfordshire	23.3%
Vale of White Horse	21.3%
West Oxfordshire	19.1%
Oxfordshire	100%

Source: ONS 2021 census and ONS 2018-based SNPP

- 2.72 The following tables 12– 16 show the estimated projected need for specialist housing for older people for the period to 2034, for each district authority. This is based on the percentage of Oxfordshire’s 65+ population for each district, applied to Oxfordshire’s total estimated need for specialist housing for older people.
- 2.73 To apply a tenure breakdown to the estimated need for specialist housing for older people by District authority, the proposed tenure split at paragraph 2.61 has been used, with the exception of Oxford city (based on the current tenure profile of the 65+ population) where a tenure split of 30% affordable rent, 60% market sale and 10%

³⁶ ONS 2021 census - P01: Usual resident population by sex, local authorities in England and Wales

³⁷ ONS 2018-based subnational principal population projections for local authorities and higher administrative areas in England

shared ownership has been used to 2029 and a tenure split of 40% affordable rent, 50% market sale and 10% shared ownership has been used from 2034.

Table 12. Estimated need for specialist housing for older people to 2034 in Cherwell. (EMA estimates).

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Sheltered/retirement housing	615	883	1,137	1,317	1,535
Market sale	430	618	682	790	921
Shared ownership	61	88	114	132	154
Social/Affordable rent	123	177	341	395	461
Extra Care housing	243	302	337	416	477
Market sale	158	199	207	238	274
Shared ownership	12	18	22	30	36
Social/Affordable rent	73	84	108	149	167

Table 13. Estimated need for specialist housing for older people to 2034 in Oxford City. (EMA estimates)

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Sheltered/retirement housing	408	586	755	875	1,019
Market sale	245	352	377	437	510
Shared ownership	41	59	75	87	102
Social/Affordable rent	122	176	302	350	408
Extra Care housing:	162	200	224	276	317
Market sale	89	112	104	130	150
Shared ownership	8	12	14	20	24

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Social/Affordable rent	64	76	106	126	143
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Table 14. Estimated need for specialist housing and accommodation for older people to 2034 in South Oxfordshire. (EMA estimates).

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Sheltered/retirement housing	657	943	1,215	1,408	1,641
Market sale	460	660	729	845	984
Shared ownership	66	94	121	141	164
Social/Affordable rent	131	189	364	422	492
Extra Care housing	260	322	360	445	510
Market sale	169	213	221	254	293
Shared ownership	13	19	23	31	38
Social/Affordable rent	78	90	116	159	179

Table 15. Estimated need for specialist housing and accommodation for older people to 2034 in Vale of White Horse. (EMA estimates).

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Sheltered/retirement housing	602	864	1,112	1,289	1,503
Market sale	421	605	667	774	902
Shared ownership	60	86	111	129	150
Social/Affordable rent	120	173	334	387	451
Extra Care housing	238	295	330	407	467
Market sale	155	195	203	232	268
Shared ownership	12	18	21	29	35
Social/Affordable rent	72	83	107	146	164

Table 16. Estimated need for specialist housing and accommodation for older people to 2034 in West Oxfordshire. (EMA estimates).

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Sheltered/retirement housing	540	775	998	1,157	1,348
Market sale	378	543	599	694	809
Shared ownership	54	78	100	116	135
Social/Affordable rent	108	155	299	347	404
Extra Care housing	214	265	296	365	419
Market sale	139	174	167	208	240
Shared ownership	11	16	20	27	32
Social/Affordable rent	64	74	110	131	147

Summary: Estimated specialist housing need for Oxfordshire by 2044

2.74 Evidence from a representative survey of c.5,600 older people aged 50+ across the UK conducted by Ipsos and the Housing LIN in December 2023 indicates that the majority of people aged 65+ intend to either remain in their existing homes (with or without making adaptations) or move to other types of mainstream housing (across all tenures). The evidence from this survey in relation to the preferences of people aged 65+ and 75+ to move to specialist housing for older people and their stated likelihood of doing so has been applied to Oxfordshire and summarised below.

Retirement/sheltered housing:

2.75 For Oxfordshire estimated need to 2044 is c.7,045 homes of which c.2,215 homes are estimated to be required for social/affordable rent and c.4,125 are estimated to be required for open market sale and c.705 for shared ownership.

2.76 In each district³⁸ there is following estimated need for retirement/sheltered housing:

- Cherwell: The estimated need to 2044 is c.1,535 homes of which 460 homes are estimated to be required for social/affordable rent, c.920 are estimated to be required for open market sale and c.155 for shared ownership.

³⁸ District and County figures may not sum due to rounding.

- Oxford City: The estimated need to 2044 is c.1,020 homes of which c.410 homes are estimated to be required for social/affordable rent, c.510 are estimated to be required for open market sale and c.100 for shared ownership.
- South Oxfordshire: The estimated need to 2044 is c.1,640 homes of which c.490 homes are estimated to be required for social/affordable rent, c.985 are estimated to be required for open market sale and c.165 for shared ownership.
- Vale of White Horse: The estimated need to 2044 is c.1,510 homes of which c.450 homes are estimated to be required for social/affordable rent, c.900 are estimated to be required for open market sale and c.150 for shared ownership.
- West Oxfordshire: The estimated need to 2044 is c.1,350 homes of which c.405 homes are estimated to be required for social/affordable rent, c.810 are estimated to be required for open market sale and c.135 for shared ownership.

Extra care housing:

2.77 For Oxfordshire estimated need to 2044 is c.2,190 homes of which c.800 homes are estimated to be required for social/affordable rent and c.1,225 homes are estimated to be required for market sale and c.165 for shared ownership

2.78 In each district³⁹ there is the following estimated need for extra care housing:

- Cherwell: The estimated need to 2044 is c.475 homes of which c.165 homes are estimated to be required for social/affordable rent, c.275 are estimated to be required for open market sale and c.35 for shared ownership.
- Oxford City: The estimated need to 2044 is c.320 homes of which c.145 homes are estimated to be required for social/affordable rent, c.150 are estimated to be required for open market sale and c.25 for shared ownership.
- South Oxfordshire: The estimated need to 2044 is c.510 homes of which c.180 homes are estimated to be required for social/affordable rent, c.295 are estimated to be required for open market sale and c.35 for shared ownership.
- Vale of White Horse: The estimated need to 2044 is c.465 homes of which c.165 homes are estimated to be required for social/affordable rent, c.265 are estimated to be required for open market sale and c.35 for shared ownership.
- West Oxfordshire: The estimated need to 2044 is c.420 homes of which c.150 homes are estimated to be required for social/affordable rent, c.240 are estimated to be required for open market sale and c.30 for shared ownership.

2.79 This will meet the housing and care needs of older people who are self-funders as well as older people who need rented housing and are eligible for social care funded by the Council.

³⁹ District and County figures may not sum due to rounding.

Estimates of future need for care home bed capacity for older people

- 2.80 From the OCC current Adult Market Position Statement, it is clear that there is an expectation that *OCC's and the NHS's requirements for care home beds will be met by existing capacity*, with the likely need to refocus existing care home capacity on people with the most complex care and health needs. This strategic 'direction of travel' has been corroborated through discussions with OCC Officers.
- 2.81 OCC intendeds to undertake a detailed assessment of the estimated need for care home bed capacity and to publish this evidence separately from this Specialist and Supported Housing Needs Assessment.

Implications for use of and development of extra care housing in Oxfordshire

Effect of potential diversion from residential care into extra care housing

- 2.82 There is evidence that extra care housing provides both better quality of life and outcomes for older people as well as financial benefits to local authorities and the NHS⁴⁰.
- 2.83 Based on the Housing LIN's national experience of local authority commissioning and placement funding practice in extra care housing, including through chairing the Local Government Association's local authority extra care housing commissioner's group in England, it is reasonable to assume that approximately 10-15% of placements into residential care could be substituted with living in extra care housing, where extra care housing is providing an equivalent level of care service. This typically applies to 'diverting' people away from a placement into residential care.
- 2.84 Local authorities that are successful in relation to 'diverting' older persons who are eligible for local authority funded care and who would have often otherwise moved to residential care homes typically have the following characteristics:
- Allocations panels for each extra care housing schemes that meet regularly and have up to date data about vacancies in and applicants for extra care housing (for each scheme).
 - Allocations panels that are chaired by a representative from the local authority Adult Social care team.
 - An extra care housing allocations policy with eligibility criteria that prioritises applicants with local authority social care eligible care needs (over applicants with no care needs).

⁴⁰ Housing LIN (2019): [Identifying the health care system benefits of housing with care](#)

- A local authority front line social care staff team that is focussed exclusively on assessing applicants for extra care housing schemes and being fully aware of the balance of care needs in existing extra care schemes, to ensure vacancies are filled by people with the most appropriate eligible care needs from the local authority's perspective (and to reflect the mix of care needs agreed for a scheme).

2.85 To estimate the number of people that could potentially be 'diverted' from residential care into extra care housing, the following method has been applied:

- OCC's data on previous years' number of people of residential care has been aggregated and estimated (with numbers of people in residential care measured each year in April). This has been forecasted forward to 2034, based on the previous years' trends.
- Scenarios where diversion rates are as follows have been explored:
 - 10% diversion rate;
 - 15% diversion rate.
 - 20% diversion rate.
- The diversion rates have been applied to the number of people in residential care and forecasted forward.

2.86 The effect of this on estimated need for extra care housing is shown in table 17 below.

Table 17. Data on residential care count (people aged 65+ funded under BCF) and forecasted forward to 2034. Projected number of people diverted from residential care to extra care housing, under a 10% or a 15% diversion rate.

People aged 65+	Historical data						Forecasted (average)		
	2018	2019	2020	2021	2022	2023	2024	2029	2034
No. of res care placements	791	753	698	721	716	740	737	737	737
<i>10% diversion</i>							74	74	74
<i>15% diversion</i>							111	111	111
<i>20% diversion</i>							147	147	147

Source: OCC and Housing LIN

2.87 The estimated number of people that could potentially be diverted from residential care homes into extra care housing (shown in table 17, above) represent additional potential moves into extra care housing. This is based on the average number of moves into residential care for OCC funded clients, i.e. an average of 737 placements per annum over the period 2018-2023. This suggests that based on the current average placements into residential care by OCC per annum, a 10% 'diversion' rate would require an additional 222 units of extra care housing by 2034, a 'diversion' rate of 15%

would require an additional 333 units of extra care housing by 2034 and, a 'diversion' rate of 20% would require an additional 441 units of extra care housing by 2034

2.88 For OCC to achieve and deliver this type of 'diversion' rate of older people away from residential care home placements and instead living in extra care housing will require:

- The operational requirements set out in paragraph 2.84.
- Agreement with the care providers operating in extra care schemes that this is a shared objective.
- Training and support for OCC front line operational care management staff to be confident in 'marketing' extra care housing to older people with Care Act eligible needs and to their families/carers.

How national and local political, economic, social, housing and technology trends, are likely to influence Oxfordshire's ECH delivery over the next 20 years

2.89 Based on the Housing LIN's experience of working with a large number of local authorities, providers of ECH and knowledge of the ECH market, in relation to ECH provided by social and charitable housing providers the future trends are expected to be:

- ECH is likely to need to be at a scale of at least 60 units or above to make it a viable proposition, particularly for care providers.
- If OCC can effectively market ECH to the older population who have Care Act eligible needs and effectively 'target' older people who would otherwise be on a care 'pathway' towards a residential care home, there is likely to be an increasing population of older people with more complex care and health needs who could be accommodated in ECH, including people living with dementia and other complex care needs.
- The ECH housing offer needs to be of sufficient quality to attract older people (including those with Care Act eligible care needs) to move from their existing homes. The research with 5,600 older people by Housing LIN/Ipsos (2023, to be published 2024) shows that older people are seeking contemporary, attractive and accessible homes, near to amenities that provide them with a good quality of life and maximise their independence. For ECH schemes to be successful as both a housing and care 'offer', they need to meet these criteria in order to encourage 'downsizing/rightsizing'.
- ECH in the future will need to be 'Wi-Fi enabled' so that residents have access to Wi-Fi in both the communal areas as well as their flats as part of the 'core' service offer. ECH services will need to be able to connect with residents via 'mainstream' technology (e.g. smart phones) as well as having digital cabling installed to enable the use of a range of sensors that can help to promote independent living and complement staff-based support.

- 2.90 OCC will need to be aware of and to manage these trends in order to ensure that extra care schemes are as relevant and attractive as possible to older people.

Observations on people in sheltered/very sheltered accommodation and the prevalence of move on to residential care vs. ECH.

- 2.91 There is no reliable national or local data/evidence in relation to the numbers of older people who are living in sheltered housing who subsequently move on to either ECH or to residential care. The Housing LIN has for social housing providers reviewed hundreds of sheltered housing schemes and extra care housing schemes. From this experience the following is becoming evident:

- The profile of need amongst people living in sheltered housing has changed over the last 10 years. The age range is widening from people aged 55 years (and below) to people aged 90+ and the range of care/support needs has widened. Tenants in sheltered housing are increasingly likely to be 'younger' older people (aged 55-65 years) with support needs rather than care or age-related needs. These support needs are increasingly linked with mental health issues and drug/alcohol misuse issues. To some extent some sheltered housing schemes are becoming in effect a form of supported housing for older people with high support needs. This cohort of tenants is far less likely to move on to either ECH or to residential care because they have a need for support rather than for care.
- The Housing LIN's recent experience of reviewing sheltered housing is that typically no more than 10-20% of tenants are receiving (domiciliary) care and in most cases this is relatively modest packages of care, i.e. not a care package that would suggest a 'pathway' towards a setting with onsite care (such as ECH or a residential care home). In our experience relatively few people living in sheltered housing with care needs move on to extra care housing. This is typically because local authorities no longer have a contractual/revenue funding relationship with providers of sheltered housing, therefore there is usually no formal 'pathway' that encourages older people with care needs living in sheltered housing to consider a move to ECH. A move to residential care is often more likely as a 'crisis' move following a person living in sheltered housing having a health crisis.

- 2.92 To enable a greater number of older people who are living in sheltered housing to consider a move to ECH would require OCC to develop a close relationship with the social landlords providing sheltered housing in Oxfordshire and agree a clear referral 'pathway' that would prompt and encourage moves from sheltered housing to ECH for people with eligible care needs.

Reflect on how well positioned Oxfordshire's ECH is able to continue to support people as their needs become more complex (e.g. through dementia or other progressive conditions). Consider how Oxfordshire's ECH needs to evolve to keep people independent in their ECH accommodation and out of residential care homes for longer.

2.93 Local authorities and ECH providers that tend to be most effective at supporting older people with increasingly complex care and health needs and that are effective in supporting people to remain living in ECH until end of life or to significantly delay moves into a care home tend to have the following characteristics:

- The local authority has officers who have a dedicated role in the operational oversight of ECH schemes, including assessment of applicants and care reviews of ECH residents.
- Where local authorities and ECH providers work collaboratively to ensure that ECH schemes have a balance of care needs amongst residents, i.e. assisting a cohort of residents with high and complex care needs to live successfully in ECH but recognising that there is a need to balance this with a larger number of residents with medium-low care needs to ensure the scheme remains vibrant and is operationally manageable for providers.
- Where the local authority and ECH staff work very closely operationally to ensure that the ECH setting is conducive to supporting people with more complex care and health needs and sustaining people in ECH settings.
- Where ECH providers have established strong relationships with local community health services, including GP practices and district nursing services, so that these services know and understand what ECH provides and are equally committed to enabling residents/patients to remain living in an ECH setting rather than a move to a care home setting.
- Where ECH providers have established strong relationships with community based palliative care services so that residents are well supported to receive end of life care in an ECH setting rather than in a hospital or care home setting.
- Where local authorities and ECH providers have designed ECH schemes to be 'dementia friendly' from the outset or in a subsequent refurbishment programme, including the potential for 'dementia wings' within an ECH scheme that can safely accommodate people living with more advanced dementia.

2.94 In order for OCC to enable older people with complex care and health needs to live in ECH and to support people to live there for as long as possible; it will need to ensure that it works with its ECH providers to deliver the 'characteristics' of ECH schemes set out above.

Analyse trends of Local Authority ECH high/medium/low care needs definitions, and comment on their likely trajectory over the next 20 years.

2.95 Historically ECH schemes were based on there being an approximately equal mix of residents with low care needs, medium care needs and high care needs. However there has never been a standardised definition of the number of care hours per person per week that make up these different care bands.

- 2.96 Over the last 10 to 15 years many local authorities and ECH providers have developed their own care band models and definitions, however a significant number of ECH providers and local authorities still retain a model of an approximate equal mix of low care needs, medium care needs and high care needs.
- 2.97 A more stark distinction has emerged between ECH schemes where all residents have care needs compared to ECH schemes where some residents have no care needs. The majority of local authorities want ECH schemes to accommodate people who have at least some level of care need.
- 2.98 In extra care schemes where all residents have a care need, typical care bands might be:
- ECH scheme type #1:
- low care needs: one to seven hours per week;
 - medium care needs: 8 to 15 hours per week;
 - high care needs: 15 plus hours per week;
- ECH scheme type #2:
- low care needs: one to 10 hours per week
 - medium care needs: 10 to 20 hours per week
 - high care needs: 20 plus hours per week
- 2.99 Given the growing older population and the greater likelihood of increasing numbers of people with complex health and care needs over the next 20 years, the trajectory of care bands in ECH schemes is likely to need to be closer to scheme type 2 in the future.
- 2.100 OCC will need to review the care bandings that it uses in its ECH schemes, as well as how it identifies and supports older people with care needs to move into its ECH schemes, to ensure that its portfolio of ECH schemes can accommodate people with increasingly high care needs.

Provide a commentary on how keyworker housing can sustain ECH staff recruitment and retention. The commentary should propose an ECH keyworker housing model that describes a baseline number of keyworker housing units for a 60-unit scheme. The commentary should describe how this model can be applied pro-rata for different size schemes and consider whether there's a minimum number of ECH units required at a scheme before keyworker housing should be required in site plans. (E.g., should there be a minimum 40 ECH units before keyworker housing is recommended).

- 2.101 The Housing LIN is not aware of ECH schemes that include a specific allocation of apartments for staff. In our experience ECH care providers have generally found it slightly less challenging to recruit staff to provide care in ECH compared to providing domiciliary care in the community.

- 2.102 It is likely that the minimum operating model for an extra care scheme in Oxfordshire is approximately 60 units.
- 2.103 The number of care staff employed at such a scheme will vary depending on the level of care needs of the residents and the mix of full time and part time staff. However, a typical ECH scheme of 60 units with all residents receiving some level of care may have between 5 to 10 care staff. If between one third and a half of these staff were to require low-cost key worker housing this would suggest a requirement for between approximately 3-5 key worker homes, i.e. a scheme of 65 units rather than 60 units. This would suggest that approximately 8% of the total number of dwellings in the scheme for a 60-unit ECH scheme should be provided additionally as key worker housing.

3. Assessment of need for supported accommodation for people with learning disabilities and/or Autistic people

- 3.01 The intention of this assessment is to identify the need for supported housing and accommodation for people with learning disabilities and/or Autistic people; including children/young people living with their families who are likely to 'transition' to eligibility to adult services.
- 3.02 The assessment of need for supported accommodation draws on a range of evidence, including:
- Demographic context: current population and projected population of people with learning disabilities and/or Autistic people known to Oxfordshire County Council adult social care and its NHS partners.
 - Current provision of supported housing and accommodation.
 - Local policy context.
 - Evidence from people with learning disability and/or Autistic people and other local stakeholders.
 - Local commissioner perspectives and intelligence.

Baseline population and population projections

- 3.03 The NHS Short- and Long-term Support (SALT)⁴¹ dataset has been used to identify the number of people aged 18+ that are eligible for adult social care support provided by the Council. It should be note that there are likely to be individuals with learning disabilities and/or Autistic people that are not eligible for adult social care support that are not identified by the SALT data.
- 3.04 To identify the existing population of people with learning disabilities and/or Autistic people aged 18+ for 2024, the 2021/22 SALT data for people aged 18-64 has been scaled up (based on the overall ratios between the 18-64 and 65+ SALT populations), and projected 2 years forward, using the methodology set out in paragraph 3.06.
- 3.05 To project forward the population aged 18-64 years with learning disabilities and/or Autistic people, the following data sources have been used:
- NHS Short- and Long-term Support.
 - The Learning Disabilities Mortality Review (LeDeR) Programme⁴²

⁴¹ NHS Digital: Short- and Long-term Support dataset (2021/22); accessed via [Adult Social Care Finance Return Data Pack](#)

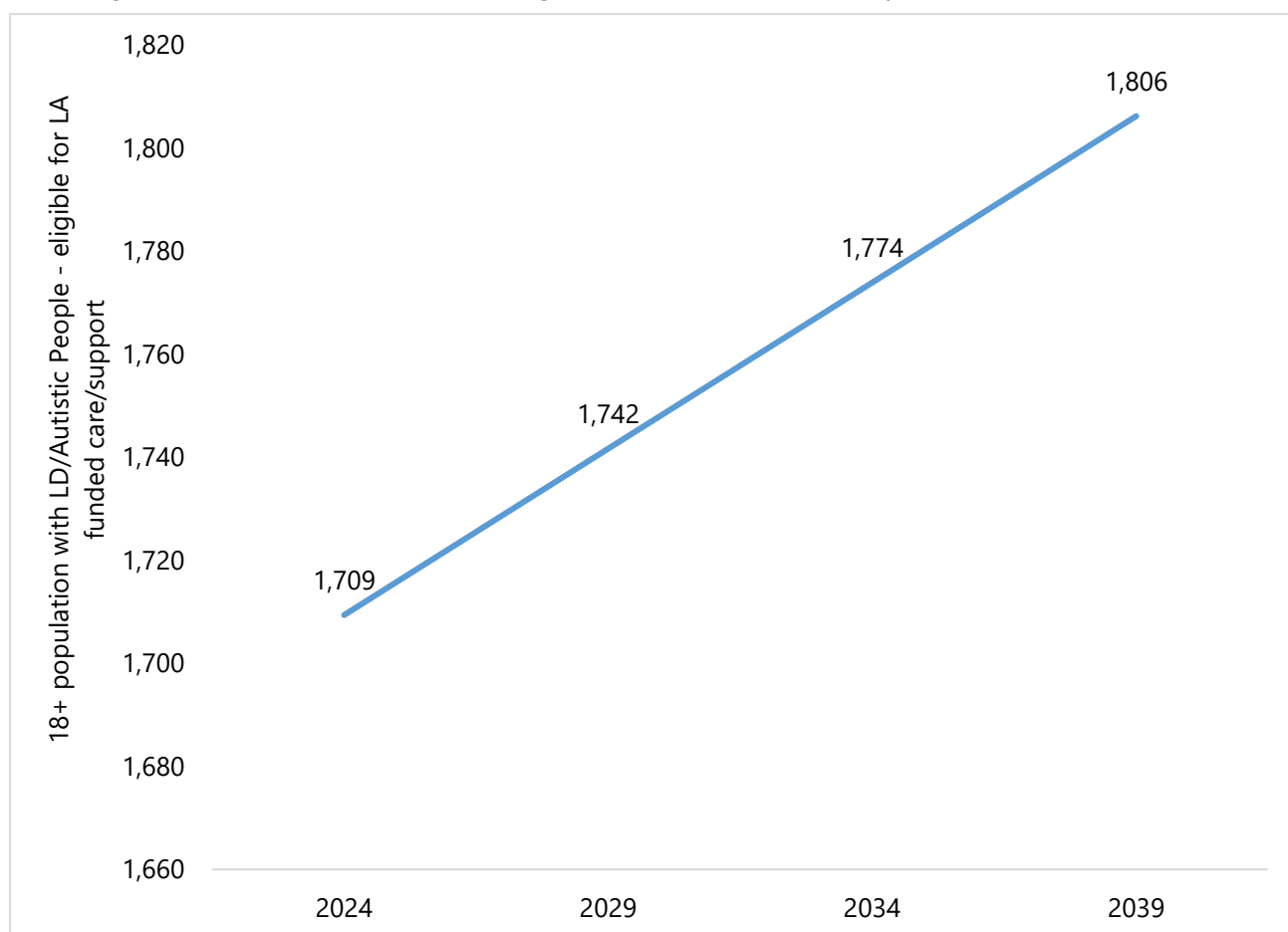
⁴² NHS: [LeDeR – learning from lives and deaths](#)

- Children with disabilities (local intelligence)⁴³
- 3.06 In order to project forward the population of people with learning disabilities and/or Autistic people aged 18+ to 2039, the following method has been used:
- The baseline population has been calculated as the number of people that are eligible for adult social care support, using the NHS SALT dataset. This is used to calculate the baseline population for each future year. This population has been used as these individuals are most likely to need and have access to a care/support package from the Council.
 - The average annual number of children with learning disabilities/Autistic Spectrum Disorder (ASD) likely to 'transition' to become eligible for adult social care support at 18 years is calculated based on the average number of 17-year-olds with learning disabilities/ASD⁴⁴ on the Council's caseload (c.20 per year), over the period 2016/17-2023/24. However, it should be noted that there maybe people who become Care Act eligible but who were not known to or eligible for Children's Services, however there is not currently sufficient data to estimate the number of people in this category.
 - The average annual number of deaths among the population with learning disabilities and/or Autistic people is calculated from the LeDeR data. This is initially adjusted to estimate the average number of deaths among the population with learning disabilities/Autistic people that would be eligible for local authority funding (as distinct from the overall population of people with learning disabilities/Autistic people) to estimate the average annual number of deaths among the population of people with learning disabilities/Autistic people in Oxfordshire (estimated to be c.13 deaths per annum).
 - To estimate the projected growth of the 18+ years population of people with learning disabilities/Autistic people, the average annual number of transitions into adult social care eligibility and the average annual number of deaths are added and subtracted respectively, to the baseline population. This projects a net increase in the population over the period to 2039 (figure 1).
- 3.07 Based on this approach there are an estimated 1,709 people aged 18+ years with learning disabilities and/or autistic people living in Oxfordshire, that are eligible for adult social care support from the Council as at 2023/2024.
- 3.08 The 18+ population of people with learning disabilities/autistic people is projected to increase to 1,742 people by 2029/30; 1,774 people by 2034/35; and 1,806 people by 2039/40.
- 3.09 Figure 1 shows this above projected population growth, based on the methodology set out above.

⁴³ Oxfordshire Council: Children with Disabilities

⁴⁴ Children aged 17 with severe or profound/multiple learning disabilities/ASD

Figure 1. Estimated population of people with learning disabilities and/or autistic spectrum condition, with eligible needs under the Care Act, aged 18+ in Oxfordshire projected to 2039



Source: NHS SALT (2020/21), LeDeR (KCL and UoB), OCC (2023/24)

3.10 Factors directly influencing the estimated growth in this population include:

- Improved healthcare: Improved healthcare may lead to increased life expectancy for people with learning disabilities and Autistic people.
- Transition to eligibility for adult social care: As children with learning disabilities or Autistic young people become 18, some will become eligible for adult social care services. An increase in the number of young people becoming eligible for adult social care services contributes to the growth of the adult population.
- Increased diagnosis: There may be an increase in the diagnosis of learning disabilities and autism spectrum conditions in particular, which may contribute to the rise in the population eligible for support from the County Council.

Current provision of supported accommodation

3.11 NHS SALT data indicates that:

- There are c.26% of people with learning disabilities and/or Autistic people either living with family and friends or in mainstream housing.

- c.47% of the population of people with learning disabilities and/or Autistic people are living in supported housing which reflects the development of this type of housing option over the last 10+ years in Oxfordshire;
- c.10% are living in care home settings and 5% are living in Shared Lives settings.

Table 18. Housing/supported accommodation status of baseline 18+ population in Oxfordshire (2023/24)

Type of accommodation/housing provision	Number of people accommodated	Percentage of people accommodated
For the population of adults with learning disabilities/Autistic people ⁴⁵ , the accommodation/housing provision and types:	1,709 adults with learning disabilities/autistic people	
Residential/nursing care	174	10%
Shared Lives (adult placement)	80	5%
Supported housing	807	47%
Living with family / friends / informal carers	448	26%
Mainstream housing	200	12%

Source: SALT 2021/22, LeDeR (2021) & OCC (2023/24)

3.12 The table below shows the supported housing provision for people with learning disabilities and/or Autistic People by each district.

Table 19. Supported housing units, by district.

District	Units of supported housing	% of total units by district
Cherwell	183	22.7%
Oxford	176	21.8%
South Oxfordshire	188	23.3%
Vale of White Horse	145	17.9%
West Oxfordshire	116	14.4%
Total	807	100%

Source: OCC (HMA anonymised dataset)

3.13 There is a relatively higher proportion of supported housing provision in Cherwell, Oxford city and South Oxfordshire compared to the Vale of White Horse and West Oxfordshire districts.

3.14 In relation to existing provision of supported housing, much of this is in the form of shared supported housing with varying levels of onsite support, where tenants have a bedroom but share the communal facilities with other tenants. There has been more recent development of supported housing in the form of small scale 'clusters' of self-contained flats with onsite support.

3.15 The evidence from national good practice (see below) and from engagement with people with learning disabilities and/or autistic people and other stakeholders (see

⁴⁵ It is possible that some Autistic people may living in supported housing that is part of a mental health 'housing pathway'

below) is that that the majority of people with learning disabilities and/or autistic people who live in, or may need/want to live in, supported housing, are increasingly seeking self-contained supported accommodation but with communal space/s that provides an opportunity for residents to socialise with each other/with friends and family members avoiding isolation

- 3.16 The Housing LIN's sector experience suggests that shared supported housing can work for some people, for example young people who may wish to share with other young people or to provide short term intensive support following hospital discharge. However, shared housing can be challenging to manage tenants' needs in relation to finding a suitable 'fit' for a household when a vacancy arises. This can result in voids that are challenging to fill. However, a collaborative approach with providers that seeks to 'match' housemates with similar interests and location preferences may be a way to mitigate these types of issues.
- 3.17 The existing stock of supported housing for people with learning disabilities and/or Autistic people is currently subject to review by the County Council.
- 3.18 Evidence from local stakeholders suggest that some of the older properties being used as supported housing have issues in relation to their suitability for adaptations, for example to accommodate the needs of people who have developed age-related or mobility related needs. Some of these needs for suitably adapted accommodation could be met through, for example, the use of extra care housing.
- 3.19 There is currently a lack of minimum standards for accommodation in relation to supported housing. The implementation of the Supported Housing Act will introduce minimum quality standards for supported housing both in relation to accommodation standards and the standards of support.

Local policy context

- 3.20 Local policy seeks to support people with learning disabilities and/or autistic people to live and be supported in the community as far as possible and supported housing is key component of enabling this to happen.
- 3.21 The Oxfordshire 2019-2022 MPS⁴⁶ states:
- The overall strategic approach is that people with learning disabilities should be supported to live in communities rather than in care homes, holding their own tenancies where possible. This has resulted in a large programme of Supported Living in Oxfordshire, with care homes only being used for a very small number of placements.
 - Key strategic objectives include:

⁴⁶ Oxfordshire Market Position Statement (2019-2022); OCC & NHS Oxfordshire CCG

- A need to recommission those Supported Living schemes that do not fit current requirements;
- A need to develop more purpose-built Supported Living schemes to meet the requirements of those with complex needs, including those who are transitioning from Children's services;
- OCC's strategy is to develop purpose-built accommodation for Autistic people across the county;
- Our intention is to move away from commissioning out-of-county placements and move those people who are currently in out-of-county placements back to Oxfordshire if it is in their best interests to do so;
- We are working with people who use services, their families/carers, providers and other stakeholders to support the development of a workforce that can meet the needs of people with learning disabilities and/or Autism.
- The Council will continue to encourage people who can live independently with low level support, and do not require 24-hour support, to have their housing needs met through general needs accommodation e.g. a shared house or a flat.
- OCC currently have a framework agreement covering Supported Living based around seven categories of need, with providers awarded framework contracts under each category. OCC reviewed this in 2019 to ensure it delivers:
 - A range of good quality cost effective providers;
 - A system that is responsive to change and can take advantage of new opportunities, e.g. a new property;
 - Providers who are able to work in partnership with local authorities and health services to improve health and wellbeing;
 - Stability in the market;
 - Efficient procurement
- On average, across previous years, 12 people with autism require Supported Living per year, where this has meant that people are placed in out-of-county residential services.
- People are typically placed out-of-county due to having complex needs which cannot currently be met in Oxfordshire. These needs are predominantly related to autism, behavioural issues, personality disorder and/or mental illness.
- In 2019 there were 75 existing Supported Living places which did not fit requirements and OCC has had an ongoing programme to recommission these services.
 - Some of these have an NHS legal charge and OCC has successfully negotiated with NHS England to reinvest the proceeds of the sale of these properties.

- In order to meet future need OCC intends to work with partners to develop new schemes, which include a combination of purpose-built Supported Living schemes, as well as conversions of existing properties. Some schemes may require self-contained annexes, to meet the needs of individuals unable to share accommodation with other people.
- OCC has a desire to develop supported housing that:
 - Are clustered together so that care can be shared more efficiently;
 - Include self-contained flats where individuals can live independently in their own accommodation, with some shared space where appropriate;
 - Contain shared accommodation, where it is required, with bedrooms incorporating en-suite facilities.

The mix and range of supported accommodation needed to meet people's needs: Evidence from people with learning disabilities/autistic people and other local stakeholders

3.22 Evidence from engagement that the Housing LIN has undertaken throughout the UK with people with learning disabilities and Autistic people and voluntary organisations that support them has identified the following key messages.

- There is a need for an increased range of good quality supported accommodation for people with a learning disability and/or autistic people.
- People with a learning disability and/or Autistic people don't want to live in a care home; care homes are not seen as aspirational or places that enable independence.
- The majority of people are seeking self-contained accommodation that enables them to live as independently as possible. For some people this may be a general needs property with an appropriate package of care/support, not necessarily supported housing.
- People are seeking to live close to amenities, shops, good public transport, GP surgeries etc, and areas with a low incidence of anti social behaviour and crime.
- Some people would prefer to live in shared accommodation; this tends to be younger people where living with friends may be a preference and reflects the housing preferences/experiences of other young people their age living without a disability.
- People are seeking support navigating the housing 'system' as choice based lettings system are often not easy to use for people with learning disabilities and some Autistic people, and accessing supported accommodation. Information needs to be 'learning disability and autism friendly', for example, through the use of easy-read tenancy agreements.

The mix and range of supported accommodation needed to meet people's needs: Council and NHS commissioner perspectives

- 3.23 The County Council's and its NHS partners' vision for housing for people with learning disabilities and Autistic people, drawing on local evidence of housing needs, the views of people with learning disabilities/autistic people, and other stakeholders' views, is set out below.
- 3.24 There is a desire to develop a *housing pathway* which includes a mix of types housing and supported accommodation, which offer people different housing choices, from housing options with 24/7 support through to access to mainstream housing with packages of care/support tailored to individuals' needs.
- 3.25 There needs to be a mix of types of supported housing which enables people to have housing choices. This will include self-contained supported housing as well as shared supported housing.
- 3.26 There is a need for a small number of specialist supported housing schemes for people with the most complex care and support needs, including 24/7 support, which, for example, can also provide 'step down' accommodation for people being discharged from inpatient or care home settings.
- 3.27 There is a need for small 'clusters' of self-contained supported housing (8-10 flats) including with communal space, both for people who need 24/7 support and for people with lower support needs.
- 3.28 County Council and NHS commissioners want to reduce the use of residential care as this is not an option wanted by the majority of people with learning disabilities and Autistic people. For some people a move to shared supported housing or another housing options from residential care may be a preferred option.
- 3.29 There is a need to review the existing stock of shared supported housing for people with learning disabilities and/or Autistic people (this work is currently being undertaken by County Council Officers). It is likely that some of this accommodation may not be suited for use as supported housing however some of this accommodation may need to be repurposed to meet current and future housing needs. This will influence the amount of additional supported housing required.
- 3.30 There is a need for fully wheelchair adapted homes for people with learning disabilities who also have significant physical disabilities.
- 3.31 There is a need for an increased range of tenure choices, such as home ownership through the Home Ownership for people with Long Term Disabilities (HOLD) scheme, where this appropriate to people's housing and care/support needs.
- 3.32 Shared Lives options will provide a complementary supported accommodation offer alongside supported housing.
- 3.33 Some people with learning disabilities and Autistic people need to have better and easier access to mainstream general needs housing. This can be a realistic option for

some people where floating support or individualised care/support packages are provided.

- 3.34 Such a housing pathway needs to be accompanied with care/support services that provide person-centred, strengths-based support for people to that enable independent living.
- 3.35 There is a need for supported housing with lower rent and service charges to enable people to access employment opportunities, where this is appropriate to people's needs and preferences.

The type and mix of supported accommodation needed to support people's needs: Drawing on supported housing good practice

- 3.36 Contemporary good practice in relation to supported housing for people with learning disabilities and/or Autistic people indicates that a range of supported housing services and accommodation types are needed to support people as part of a *housing pathway* approach referred to above.
- 3.37 New supported housing developments have tended to be 'clusters' of flats and there has been a reduction in the use of 'shared housing' models of supported housing.
- 3.38 There has been development of new supported housing by both 'mainstream' and 'specialist' (i.e. providers that solely develop supported housing) housing associations particularly in relation to developing small-scale 'clusters' of flats with modest communal space typically of between 8-10 1-bed flats in the same building often with 24/7 support.
- 3.39 There are a range of examples of contemporary supported housing practice that can be drawn on as approaches that can support people with a range of housing and care/support needs.
- 3.40 In relation to people with very complex support needs, an example of a bespoke supported housing scheme has been developed by Choice Support⁴⁷, which has 6 self-contained units with staff facilities, designed for people with complex needs related to 'challenging behaviours', e.g. including features such as curved (and removable) internal walls, soft impact finishes to floors and walls.
- 3.41 An example of new build accommodation for people with learning disabilities is Anvil Court⁴⁸ a scheme in Hampshire developed, financed and owned by Hampshire County Council. It is a block of 10 1-bed flats with an additional 3 wheelchair adapted bungalows. This supported housing scheme has 24/7 care on site and is aimed at people with learning disabilities with a range of care needs.

⁴⁷ <https://www.choicesupport.org.uk/stories/transforming-care-mayman-lane>

⁴⁸ <https://documents.hants.gov.uk/adultservices/Extra-Care-Younger-adults-Brochure-2020.pdf>

- 3.42 In relation to people with very complex support needs an example of a bespoke supported housing scheme has been developed by Choice Support⁴⁹. This is an example of a supported housing scheme, including 6 self-contained units with staff facilities, designed for people with complex needs related to 'challenging behaviours', e.g. including features such as curved (and removable) internal walls, soft impact finishes to floors and walls.
- 3.43 Enham Trust's Bradbury Place in Andover⁵⁰, Hampshire is an example of a co-designed project for people with learning disability and/or physical disabilities. The success of the project was largely influenced by the Enham Trust client design panel. It provides 8 one- and two-bedroom wheelchair accessible apartments, within 500 metres of the town centre.
- 3.44 Thirteen's Acorn House⁵¹, in Thornaby provides a flexible and adaptable design which engages with outside space and nature. It is designed to wheelchair standards and is care ready and adaptable. It provides support including Telecare and assistive technology. It has active spaces and circulation areas with a lift to the upper floor and uses natural light wherever possible.
- 3.45 An example of contemporary supported living scheme for people with learning disabilities and age-related needs is Tolvean House in Cornwall, developed by Advance Housing. This includes a small new build block of flats with design features specifically suited to people with learning disabilities living with dementia and refurbishment of an existing building to provide housing for people with lower-level support needs.
- 3.46 A key part of a housing pathway approach is enabling people with learning disabilities and/or Autistic people to move in to and remain living in mainstream housing, with provision of housing related support as necessary to help people to maintain their tenancies.
- 3.47 The most recent guidance from the Care Quality Commission in relation to supported living for people with learning disabilities/Autistic people, *Right Support, Right Care, Right Culture*⁵² emphasises:
- 3.48 The need for a separation between the organisations providing housing and care, i.e. that tenants have security of tenure and a choice of care provider (and that their security of tenure is not compromised by their choice of care provider).
- 3.49 The need to avoid 'institutional' and 'congregate' forms of accommodation.
- 3.50 The use of tenancy agreements that maximise security of tenure (rather than the use of license agreements).

⁴⁹ <https://www.choicesupport.org.uk/stories/transforming-care-mayman-lane>

⁵⁰ https://www.housinglin.org.uk/assets/Resources/Housing/Practice_examples/Housing_LIN_case_studies/HLIN_CaseStudy_142_BradburyPlace.pdf

⁵¹ <https://www.housinglin.org.uk/Topics/ECHScheme/search/Acorn-House/>

⁵² https://www.cqc.org.uk/sites/default/files/2022-06/900582%20Right%20support%20right%20care%20right%20culture_v5_0.pdf

Estimated need for supported accommodation by 2039

3.51 The estimate of need for supported housing and accommodation for people with learning disabilities and/or Autistic people is based on the following approach.

3.52 Projections in relation to population growth and supported housing and accommodation need are based on the following assumptions and considerations:

- There are an estimated 1,709 people aged 18+ years with learning disabilities and/or Autistic people living in Oxfordshire who are eligible for adult social care support from the Council (2023/2024), based on the NHS Short- and Long-term Support (SALT)⁵³ data, projected forward from 2020/21.
- The population of people with learning disabilities in Oxfordshire (SALT) changes in line with the average number of deaths per year amongst the population with learning disabilities/Autistic people and the number of 17-year-olds transitioning to eligibility for adult social care with the County Council.
- On this basis the population people with learning disabilities/Autistic people is projected to increase from 1,709 in 2024/25 to 1,742 people by 2029/30, to 1,774 by 2034/35 and to 1,806 people by 2039/40.
- The need for residential care is expected to decrease from c.10% of the population living in care homes in 2024 to c.6% by 2039.
- The percentage of the population living in supported housing is expected to increase due to the increasing overall population, the anticipated reduction in the need for residential care and from people no longer able to live with older and ageing carers.
- Need for mainstream housing with a care/support package is expected to increase due to the increase in the overall population of adults with a learning disability.
- Living with family / informal carers: based on similar projects it is assumed that the percentage of people living with family carers, particularly older carers will decrease by c.15% by 2039.
- Growth has been assumed for Shared Lives over the period to 2039.
- The local Dynamic Support Register indicates that there are currently c.15 people in inpatient in secure settings who may need a housing and care alternative over the next 5 years.

3.53 Engagement with people with learning disabilities and Autistic people by the Housing LIN indicates that:

⁵³ NHS Digital: Short- and Long-term Support dataset (2021/22); accessed via [Adult Social Care Finance Return Data Pack](#)

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- There is a need for supported housing that is predominantly self-contained and supports independent living.
- There is a need for some supported housing with significant support on site that enables people to 'step down' (i.e. move from) from hospital/care home settings.
- There is very little desire to live in residential care settings.
- There is a requirement for access to mainstream housing with support as required.

3.54 Additional supported housing requirements to meet projected housing need and changes in the types of accommodation/supported housing required are based on applying the assumptions above. This is adjusted for identified population change over the period to 2039.

3.55 The estimated need for accommodation/supported housing for people with learning disabilities and/or Autistic people is shown Table 20. This shows the number of additional homes required to meet estimated unmet by 2029, 2034, and 2039.

Table 20. Estimated need for supported housing and accommodation for people with learning disabilities and/or Autistic people to 2039⁵⁴.

	Current provision and population (2024)	Existing supply of housing & accomm. types (%)	Adult pop. 2029 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. 2034 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. 2039 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)
Population	1,709		1,742		1,774		1,806	
Housing & accommodation types								
Residential/nursing care	174	10%	153	9%	131	7%	108	6%
Shared Lives (adult placement)	80	5%	89	5%	99	6%	108	6%
Supported housing	807	47%	856	49%	906	51%	957	53%
Living with family / friends	448	26%	432	25%	415	23%	397	22%
Mainstream housing	200	12%	211	12%	223	13%	235	13%
Totals	1,709	100%	1,742	100%	1,774	100%	1,806	100%
Net supported housing and accommodation requirements			58		118		179	
Net need: Shared Lives			9		19		28	
Net need: Supported housing			49		99		150	

Source: NHS SALT data 2020/21, LeDeR (2021) and OCC(2023/24).

⁵⁴ The estimates may change if the population changes significantly over the period to 2039. It would be prudent for OCC adult social care commissioners to check this, for example, every 5 years.

3.56 In summary, it is estimated that:

- an additional c.50 units of supported housing and c.10 shared lives places are needed by 2029;
- an additional c.100 units of supported housing and c20. shared lives places are needed by 2034;
- an additional c.150 units of supported housing and c.30 shared lives places are needed by 2039;

3.57 In order to project the estimated need for supported housing for each district, the relative proportions of the population with learning disabilities/Autistic people have been identified in each district (table 21).

3.58 The table below shows the comparison between the populations with learning disabilities/Autistic People, as recorded on the NHS QOF dataset⁵⁵.

Table 21. The number of people with learning disabilities registered on GP records, for each district in Oxfordshire. Percentage of total for each district area.

Local Authority	QOF LD population	Percentage of QOF LD population (in relation to Oxfordshire total)
Cherwell	574	19.9%
Oxford City	693	24.1%
South Oxfordshire	560	19.5%
Vale of White Horse	557	19.4%
West Oxfordshire	494	17.2%
Total (Oxfordshire)	2,878	100%

Source: QOF 2021/22

3.59 The above table shows that proportion of the QOF learning disability population, for each district comparatively is:

- Relatively higher for Oxford City, compared to the other districts;
- Relatively lower for West Oxfordshire, compared to the other districts;

3.60 The above evidence has been used to disaggregate the estimated housing need for supported housing for people with learning disabilities in Oxfordshire, by each district. This disaggregation is shown in table 22.

3.61 Table 22 below shows the number of units required to meet unmet need projected to 2029, 2034, and 2039.

⁵⁵ Quality and Outcomes Framework 2021-22: Prevalence, achievement and personalised care adjustments

Table 22. Estimated need for supported housing by 2039, by district.

Locality	Est. need for supported housing by 2029 (units)	Est. need for supported housing by 2034 (units)	Est. need for supported housing by 2039 (units)
Cherwell	10	20	30
Oxford City	12	24	36
South Oxfordshire	10	19	29
Vale of White Horse	9	19	29
West Oxfordshire	8	17	26
Oxfordshire (overall)	49	99	150

- 3.62 The estimated need for supported housing required to 2039, shown in Table 20, could be met potentially by the following 'components' of the housing pathway.
- 3.63 Work in progress by Oxfordshire County Council to review existing supported housing services, including identifying potential re-provision and decommissioning options. Depending on the outcome of this process, it is possible that a proportion of the estimated additional need for supported housing may be met through this process of making best and most effective use of existing supported housing capacity. Other options in a suggested housing pathway to meet estimated need for supported housing and accommodation are set out below.
- 3.64 Supported housing for people with complex support needs (including forensic related needs). This is typically a small block of flats (c.5-6 units) with 'low stimulus' design features with 24/7 support, which can provide 'step down' accommodation for people being discharged from inpatient settings or care homes (as an alternative to 'bedded care) and/or in relation to avoidance of admission to inpatient beds.
- 3.65 For some individuals with complex support needs, they may require bespoke individualised properties with 'low stimulus' design features with potential for 24/7 support. It is assumed that this will be only where individuals are assessed as not being suited to any other form of supported housing where there is shared support.
- 3.66 Additional 'clusters' of self-contained supported housing of c.8 units, that provide medium term supported housing (for example for up to 2-3 years), both for people with moderate support needs who don't need or who no longer need 24/7 supported housing but who need a supportive environment before moving to independent housing. Suggested requirement c.10 units in each District.
- 3.67 Consideration of development of Shared Lives places for people with learning disabilities; c.20 places by 2034 and c.30 places by 2039.
- 3.68 This evidence reviewed in relation to future need suggests that there is a requirement to:
- Review the needs of people currently in care home placements to assess their suitability for a move to a supported housing alternative (and the specification of the supported housing alternative/s).

- Review the purpose and suitability of existing shared supported housing to assess their future use as supported housing and the potential for tenants to move on to other housing options (this is currently happening).
- 3.69 There is a need for people with learning disabilities/Autistic people to have better access to mainstream general needs housing (with and without appropriate adaptations) and to be supported with floating support to enable people to live within the community. This could include developing community support networks as a model of support as this would enable people to live in mainstream accommodation as well as providing support to access community life.
- 3.70 The need amongst people aged 65+ with learning disabilities/Autistic people for supported accommodation may be met through the development of the proposed housing pathway above. However, some older people with learning disabilities/Autistic people will benefit from access to age designated supported accommodation, such as sheltered/retirement housing and extra care housing.
- 3.71 These mix of housing types would be linked/matched to a range of support options for people with learning disabilities and Autistic people including 'improve and enable' for different age cohorts and 'support and protect' for people with complex needs and forensic related needs.

4. Assessment of need for supported housing for adults with mental health needs

- 4.01 The intention of this assessment is to identify the need for accommodation and supported housing for working-age people with mental health needs who are eligible for a package of care from OCC and/or support/care from NHS specialist mental health services.
- 4.02 The assessment of need for supported accommodation for people with mental health needs draws on a range of evidence, including:
- Demographic context: current population and projected population of people with mental health needs.
 - Current provision of supported housing and accommodation.
 - Local policy context.
 - Local commissioner perspectives and intelligence.
 - Evidence from people with mental health needs.

Baseline population and projections

- 4.03 The following data sources have been reviewed to provide an estimate of the number of working age adults with mental health needs in Oxfordshire.
- 4.04 To project forward the population aged 18-64 with mental health related needs, following data sources have been used:
- Mental health conditions prevalence - Quality Outcomes Framework (QOF)⁵⁶ prevalence trends (annual growth: 2013-2021);
 - Mental Health Services Data Set (MHSDS) for Oxfordshire including accommodation status (June 2022)⁵⁷
- 4.05 The NHS MHSDS data provided by OCC indicates that there are 27,128 people registered with the with NHS with recorded accommodation status, as at June 2022⁵⁸. This is projected to 27,929 by 2024 (see para **Error! Reference source not found.**).

⁵⁶ OHID: NHS Oxfordshire CCG – Quality Outcomes Framework prevalence - [Severe Mental Illness - Data - OHID \(phe.org.uk\)](#); The percentage of patients with schizophrenia, bipolar affective disorder and other psychoses as recorded on practice disease registers.

⁵⁷ Number of patients active on caseload in July 2022, Oxford health – MHSDS (30397), July 2022 submission

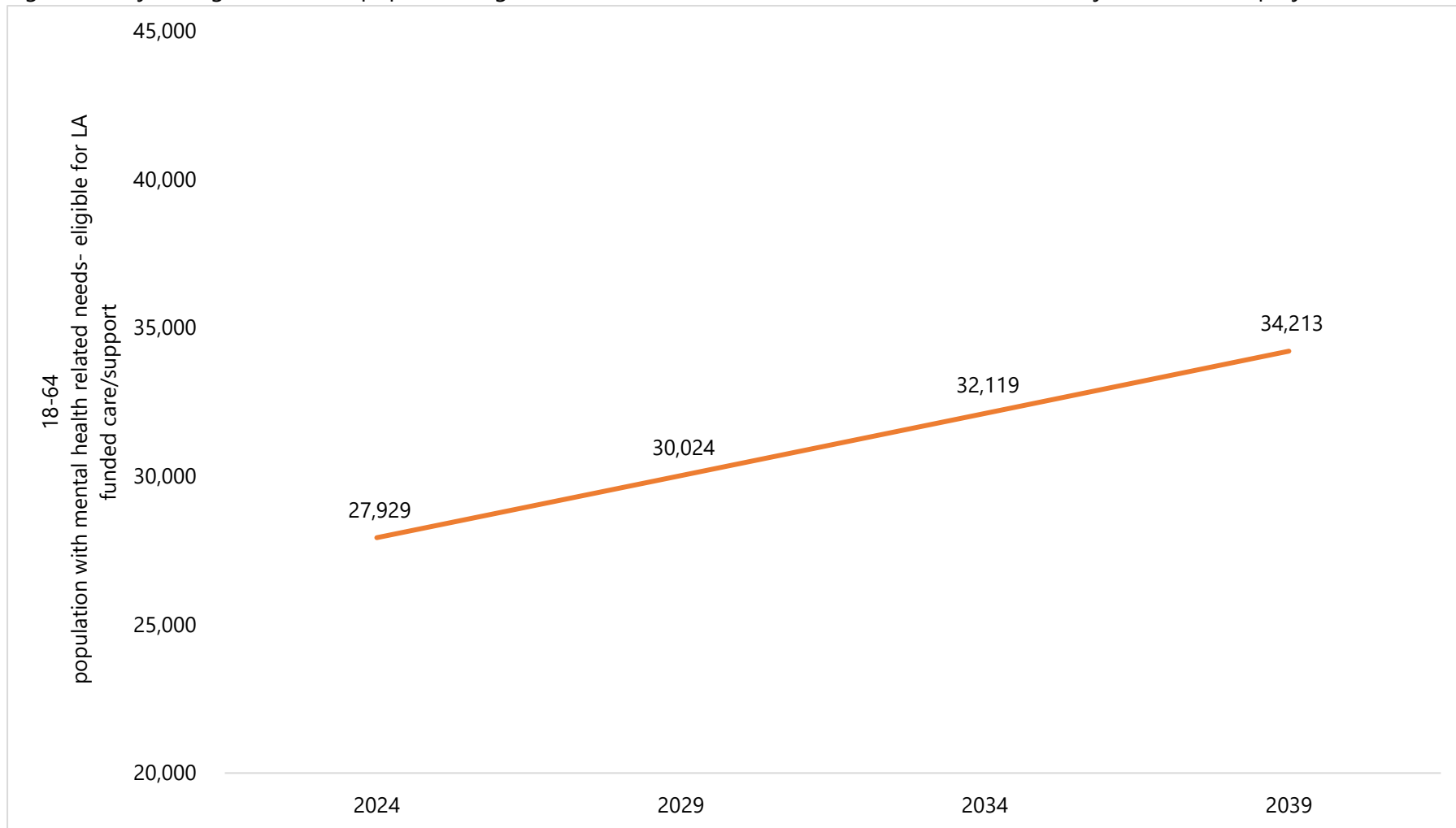
⁵⁸ Number of patients active on caseload in July 2022, Oxford health – MHSDS (30397), July 2022 submission

- 4.06 The 2022 MHSDS figures are used as the baseline population for adults with mental health needs. This data is anticipated to provide a more representative estimate of the working age adult population with mental health needs.
- 4.07 In relation to changes in the population⁵⁹ of adults with mental health needs, based on the QOF data for the last 8 years which shows an c.26% change in this cohort over the period from 2013 to 2021, there is estimated to be a c.15% increase over the next 5 years, a c.30% increase over a 10-year period and a c.60% increase over a 20-year period.
- 4.08 However, it is more likely that the overall 18-64 years MHSDS population may reflect changes in the overall working age population for Oxfordshire. The anticipated trend in the overall working age population is projected to be an increase of 0.011% in this population per annum⁶⁰ to 2039.
- 4.09 An average of the projected trends in the QOF population of people with mental health needs and the overall working age population suggests a projected increase of 1.5% per annum in the overall population of people with mental health needs, equating to an increase of c.7.5% to 2029, c.15% to 2034 and c.22.5% to 2039.
- 4.10 Figure 2 **Error! Reference source not found.** below shows the projected increase in the working age population with mental health needs from 2024, to 2029, 2034, and 2039.

⁵⁹ Mental health conditions prevalence - Quality Outcomes Framework (QOF) prevalence trends (annual growth: 2013-2021). NHS Oxfordshire CCG – [Severe Mental Illness - Data - OHID \(phe.org.uk\)](https://www.phe.org.uk).

⁶⁰ ONS 2018-based Subnational Population Projections for England; released in 2020

Figure 2. Projected growth of the population aged 18-64 with mental health needs to 2039: MHSDS (Adjusted to 2024, projected forward).



Source: NHS MHSDS (2022) – OCC/NHS Oxford Health & ONS 2018-based SNPP

Current provision of supported accommodation

4.11 NHS MHSDS data indicates that the majority of people with mental health needs aged 18-64 are living in mainstream housing. A small proportion of people with mental health needs are living in supported housing and in residential/nursing care. This is shown in Table 23.

Table 23. Housing/accommodation status of adult 18-64 years population with mental health needs in Oxfordshire (2024).

Accommodation/housing provision	Number of people accommodated	Percentage of people accommodated
For the population of people with mental health needs, the supported accommodation/housing provision and types:	27,929 adults with mental health needs (MHSDS)	
Residential/nursing care	402	1%
Supported housing ⁶¹	353	1%
Mainstream housing (owner occupied/rented)*	15,681	56%
Living with family/friends/carers	11,032	40%
Inpatient/NHS setting	177	1%
Homeless/rough sleeper	142	1%
Criminal justice setting	142	1%

Source: NHS MHSDS and Oxfordshire Council

* Mainstream housing includes those that have been recorded under "Other accommodation" – c.10,000 people

4.12 Table 24 below shows how the supported housing provision is distributed by each district and by type of supported housing provided.

⁶¹ Source: OCC

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Table 24. Supported housing provision for people with mental health related needs in Oxfordshire, disaggregated by number of units provided in each district and by type of supported housing

Type of accommodation	Cherwell	Oxford City	South Oxfordshire	Vale of White Horse	West Oxfordshire	Oxfordshire (total)
Shared housing/HMOs						
Schemes	3	42	5	1	4	55
No of units: shared housing/HMOs	9	211	20	5	8	253
Self-contained						
Schemes (including schemes and single occupancy flats)	3	17	9	0	6	35
No of units: self-contained	9	76	9	0	6	100
Total (units)	18	287	29	5	14	353
of which, no of units with 24/7 support	0	43	0	0	0	43

Source: Oxfordshire County Council

- 4.13 The key characteristics of the existing supply of supported housing⁶² are:
- It is predominantly located in Oxford (c.81% of all existing supported housing).
 - It is predominantly supported housing in shared housing/homes of multiple occupation (c.72% of all supported housing).
 - A minority of supported housing is in self-contained housing (c.28% of all supported housing).
 - c.15% of existing supported housing has 24/7 support on site.
- 4.14 The evidence from the MHSDS data indicates that there are more people living in residential/nursing care homes than living in supported housing.
- 4.15 Shared Lives is not used currently as a supported accommodation option for people with mental health needs.

The mix and range of supported accommodation needed to meet people's needs: Evidence from people with mental health needs

- 4.16 Evidence from engagement that the Housing LIN has undertaken throughout the UK with people with mental health needs and voluntary organisations that support them has identified the following 'key messages':
- There is a need for an increase in supported housing for people with a mental health needs, particularly accommodation that supports people with complex mental health needs. This housing to be within Oxfordshire in order to reduce the number of people having to move out of area.
 - There is a need to develop housing outside of Oxford City to support people to remain in their local Oxfordshire community.
 - There is no desire amongst the majority of people with mental health needs to live in residential/nursing care settings.
 - There is a need for more 'step-down' accommodation that supports people to transition from acute hospital settings to supported housing, typically with 24/7 onsite support. This type of supported housing can also be used as a housing option that a person could move to temporarily (for example where they may be living in general needs housing) to avoid a move to an inpatient setting or care home setting.
 - In many cases, people with mental health needs would prefer and are able to live in mainstream housing with support.
 - If supported housing is needed, self-contained accommodation is typically preferred over shared accommodation (although it is recognised that some people

⁶² Data supplied by Oxfordshire County Council commissioners (2024)

may prefer and benefit from living in shared housing settings, for example, some younger people).

- The majority of people who need supported accommodation are seeking small-scale supported housing schemes.
- People are seeking to live in locations with good access to public transport, shops, amenities and support services.
- Where people with mental health needs are living successfully independently in the community, they may need ongoing or occasional support from a housing support service in order to maintain a tenancy.
- Some people with mental health needs report that the process for finding mainstream housing, both in the private rented sector or through choice-based lettings for access to social housing, is often very challenging which can cause anxiety and stress. Often people need support with this process of finding and securing access to mainstream housing.

The type and mix of supported accommodation needed to support people's needs: Drawing on supported housing good practice

- 4.17 Contemporary good practice⁶³ in relation to supported housing for people with mental health needs indicates that a range of supported housing services and accommodation types are needed to support people as part of a *housing pathway* approach, i.e. where there are a range of housing options, including supported housing as 'step down'/admission avoidance accommodation; supported housing with 24/7 support for people with complex support needs; supported housing for people with lower support needs (not requiring 24/7 support); Shared Lives; and independent housing with access to support.
- 4.18 In relation to recent trends in provision of supported housing for people with mental health needs, new supported housing developments have tended to be small blocks of flats and there has been a reduction in the use of 'shared housing' models of supported housing.
- 4.19 There has been some development of supported housing that offers a 'step-down' model to enable people to be discharged in a timely and successful way from acute mental health hospital beds into a good quality housing offer with support available. These supported housing models are as likely to be funded by NHS commissioners (to cover care/support costs and rent) as by local authorities.
- 4.20 An example of a supported housing 'step down' resource is Riverside Housing's scheme at Tile House in London⁶⁴. Tile House provides 15 high quality, self-contained supported housing units. Some of these supported housing units offer 'step down'

⁶³ Specialist and Supported Housing Strategy: Contemporary Practice Guide

⁶⁴ <https://www.candi.nhs.uk/our-services/tile-house-0> See supported housing good practice guide

accommodation from acute settings; other units are available for a period of up to two years. The care and support arrangements are delivered through a partnership with Camden and Islington NHS Foundation Trust. The scheme is designed to deliver an integrated approach to supported housing and recovery for people with complex mental health needs.

- 4.21 Salveson House, in London Borough of Hackney⁶⁵, is a block of 18 new build self-contained flats for people with severe mental health needs operated by One Housing. It provides supported housing with 24/7 staffing as part of a wider mental health accommodation pathway in Hackney. Tenants live here for up to 3 years before moving on to independent housing.
- 4.22 A key part of a housing pathway approach is enabling people with mental health needs to move into and remain living in mainstream housing, with provision of housing related and other support as necessary to help people to maintain their tenancies.

The mix and range of supported accommodation needed to meet people's needs: Local commissioner perspectives

- 4.23 Commissioner experience and knowledge has identified the following issues with and gaps in the existing provision of supported housing and accommodation, drawing on local evidence of need for specialist and supported housing and the views of people with mental health needs and other local stakeholders.
- 4.24 This includes having the following mix of housing and types of supported accommodation which can meet people's differing needs (for housing and care/support) and have differing intended lengths of stay (reflecting the intended purpose of different types of supported housing):
- Supported housing for people with complex mental health needs. This is typically a small group of flats (c.5-6 units) with 24/7 support, which can provide 'step down' accommodation for 'discharge to assess' purposes, for people being discharged from inpatient and care home settings (as an alternative to 'bedded care'), where these people's needs cannot be supported in existing supply, typically for c.6-12 months.
 - Supported housing that is 'step up' accommodation to prevent hospital or care home admission (which could be part of 'step down' accommodation or 'short stay' accommodation within a larger supported housing scheme).
 - Additional small blocks of flats of self-contained supported housing of c.8-10 units that provides medium to long term supported housing, for people who no longer need 24/7 supported housing, for people who need a supportive environment before moving to independent housing and for people who may have physical and mental health needs, possibly linked to ageing.

⁶⁵ <https://www.e-architect.com/london/supporting-housing-hackney>

- There is a need for supported housing that can accommodate and support appropriately people with 'dual diagnosis' but where mental health is the primary needs (but where there is a cross over with needs linked to drug/alcohol use and homelessness), in this instance supported housing may not necessarily require 24/7 staffing; and for supported housing that can accommodate and support appropriately people with forensic related needs.
- Supported housing needs to be able to cater for young people with complex mental health needs, for example, young people with emotionally unstable personality disorder (EUPD).
- There are estimated to be c.36 people with complex support needs who need to move on from inpatient and care home settings.
- There is a need to review the existing range of shared supported housing to assess its quality and suitability as a form of housing that can support people's recovery. However, it should be noted that shared supported housing will suit some people, particularly in relation to avoiding social isolation.
- There is a need for people with serious mental health needs to have better access to mainstream general needs housing, including Extracare housing and to be supported with floating support and domiciliary care to enable people to live within the community. This could include developing community support networks as a model of support as this would enable people to live in mainstream accommodation as well as providing support to access community life.
- In relation to access to mainstream housing to rent and in relation to developing additional supported housing, the role of the District and City Councils in Oxfordshire is crucial in enabling access to these housing options. Increase in move-on accommodation is required from mental health transitional housing to mainstream accommodation to impacts on other parts of the mental health system, c. 80⁶⁶ people are in some form of readiness to manage their own tenancies.
- Shared Lives may be an option for some people with mental health needs, and this would require change to current operation to enable more people with mental health to access this service; the intended length of stay is likely to vary depending on a person's needs.

Estimated need for supported housing and accommodation by 2039

4.25 The estimate of need for supported accommodation for people with mental health needs is based on evidence in relation to:

- Projections in relation to population growth.

⁶⁶ c. 80 as at March 2024

- Good practice in the provision of supported and specialist housing for people with mental health needs.
 - The insights and experiences of local commissioners and their partners.
 - The Housing LIN's experience of the commissioning and provision of supported housing and other housing/accommodation options as part of the housing 'pathway' for people with serious mental health needs.
- 4.26 It is also based on research by the Housing LIN with people with mental health needs⁶⁷ which indicates that:
- There is a need for supported housing that supports recovery and independent living.
 - There is a need for supported housing with significant support on site that enables people to 'step down' from acute/hospital settings.
 - There is no desire to live in residential care settings.
 - There is a requirement for access to mainstream housing with support as necessary.
- 4.27 Assumptions have been made about the need for different types of accommodation and supported housing, drawing on evidence set out above and in the preceding sections
- 4.28 The following assumptions have been used to estimate supported housing and accommodation need for people with mental health needs:
- 4.29 The population growth of the working age population with mental health needs is assumed to be 1.5% per year (paragraph 4.09).
- 4.30 Residential and nursing care use is assumed to decrease to be used by no more than c.0.5% of this population cohort by 2039.
- 4.31 Growth in the working age population with mental health needs and any reduction in need for residential/nursing care, is likely to be reflected in increasing need for supported housing.
- 4.32 It is assumed that any decrease in inpatient numbers will be reflected in additional supported housing capacity designed to facilitate 'step down' and/or admission avoidance.
- 4.33 It is assumed that any decrease in the number of homeless people, including rough sleepers, will be reflected in additional supported housing capacity.
- 4.34 It is assumed that any decrease in people in criminal justice settings will be reflected in additional supported housing capacity designed to support people with forensic related needs.
- 4.35 There is a modest increase in need assumed for Shared Lives.

⁶⁷ Qualitative research undertaken by the Housing LIN with people with lived experience on behalf of local authorities over the period 2022-2024.

Specialist and Supported Housing Needs Assessment

- 4.36 Changes in net housing and supported housing requirements to meet projected housing need and changes in the types of housing/supported housing required are based on applying the assumptions above to the projected population of people with mental health needs over time to 2039.
- 4.37 The estimated need for housing and supported housing for people mental health related needs is shown in Table 25 **Error! Reference source not found.** This shows the number of homes/units currently available to meet need and the number of homes/units required to meet unmet need estimated to be required by 2029, 2034 and 2039.

Table 25. Oxfordshire: Estimated need for housing and supported accommodation for working age adults with mental health needs to 2039⁶⁸

	Current provision and pop. (2024)	Existing supply of accom. types (%)	Adult pop. and estimated housing need by 2029	Est. need for accom. types (%)	Adult pop. and estimated housing need by 2034	Est. need for accom. types (%)	Adult pop. and estimated housing need by 2039	Est. need for accom. types (%)
Population	27,929		30,024		32,119		34,213	
Housing & accommodation types								
Residential/nursing care	402	1%	338	1%	261	1%	171	0.5%
Supported housing	353	1%	453	2%	564	2%	684	2%
Mainstream housing	15,681	56%	16,882	56%	18,088	56%	19,296	56%
Living with family/friends	11,032	40%	11,925	40%	12,826	40%	13,737	40%
Inpatient/NHS Setting	177	1%	167	1%	154	0.5%	137	0.4%
Homeless/rough sleeper	142	1%	127	0.4%	108	0.3%	86	0.3%
Criminal justice setting	142	1%	132	0.4%	119	0.4%	103	0.3%
Totals	27,929	100%	30,024	100%	32,119	100%	34,213	100%
Net need: Supported housing			100		211		331	

⁶⁸ The estimates may change if the population changes significantly over the period to 2039. It would be prudent for OCC adult social care commissioners to check this, for example, every 5 years.

4.38 In summary, it is estimated that:

- An additional c.100 units of supported housing are needed by 2029;
- An additional c.210 units of supported housing are needed by 2034;
- An additional c.330 units of supported housing are needed by 2039;

4.39 In order to disaggregate the estimated need for supported housing for each district authority, the following method has been applied (as set out in Table 26 below):

- GP level data on the number of people with a mental health related need registered with a GP was analysed.
- The number of people with a mental health need registered with a GP was aggregated for each district. This provides the total number of people registered with their GP where they have a recorded mental health related need, by district.
- The percentage composition of each district's population registered with a GP with a mental health related need is calculated, out of Oxfordshire's total GP registered population with a mental health related need.
- The percentage for each district's population is then applied pro rata to the overall estimated additional need for supported housing in Oxfordshire.

Table 26. People with mental health needs by District

Local authority	Total patients	Number registered with mental health needs	Prevalence	% of total
Cherwell	164,704	1,296	0.8%	21%
Oxford City	177,095	1,878	1.1%	30%
South Oxfordshire	145,894	1,116	0.8%	18%
VoWH	129,427	1,000	0.8%	16%
West Oxfordshire	134,525	1,014	0.8%	16%
Total (Oxfordshire)	751,645	6,303	0.8%	100%

Source: NHS digital 2021/22

4.40 The estimated additional need for supported housing is shown disaggregated by district authorities in Table 27.

Table 27. Estimated need for additional supported housing to 2039 by district in Oxfordshire.

Locality	Estimated need for additional supported housing by 2029 (units)	Estimated need for additional supported housing by 2034 (units)	Estimated need for additional supported housing by 2039 (units)
Cherwell	21	43	68
Oxford City	30	63	99
South Oxfordshire	18	37	59
Vale of White Horse	16	33	53
West Oxfordshire	16	34	53
Total (Oxfordshire)	100	211	331

4.41 The Council and its NHS partners want to develop a housing 'pathway' for people with mental health needs (who are in contact with/supported by specialist mental health services).

4.42 The estimated need for supported housing required over the next 5 years to 2029, shown in Table 25, could be met potentially by the following 'components' of the housing pathway:

- Supported housing for people with complex mental health needs. This is typically a small block of flats (c.5-6 units) with 24/7 support, which can provide 'step down' accommodation for people being discharged from inpatient settings (as an alternative to 'bedded care) and/or 'step up' in relation to avoidance of admission to inpatient beds. Suggested requirement c.6 units.
- Supported housing for people with complex mental health needs with dual diagnosis related needs. This is likely to be typically a small block of flats (c.5-6 units) with 24/7 support. Suggested requirement c.6 units.
- Supported housing for people with mental health needs with forensic related needs. This is likely to be typically a small group of flats (c.5-6 units) with significant support available (but not necessarily 24/7). Suggested requirement c.6 units.
- Additional groups of self-contained supported housing of c.8-10 units, that provide medium term supported housing (for example for up to 2-3 years), both for people who don't need or who no longer need 24/7 supported housing but who need a supportive environment before moving to independent housing (e.g. daytime support with night security). Suggested requirement c.10 units in Oxford, South Oxfordshire, Vale and West Oxfordshire. c.20 units in Cherwell.
- Consideration of development of Shared Lives places for people with mental health needs; c.20 places by 2039.
- This evidence reviewed in relation to future need suggests that there is a requirement to:
 - Continue to ensure reviews are carried out yearly of the needs of people currently in care home placements to assess their suitability for a move to a supported housing alternative (and the specification of the supported housing alternative/s).
 - Review the purpose and suitability of existing shared supported housing to assess their future use as supported housing both in terms of the buildings and the refocus to the more complex end of need. Identification of the potential for tenants to move on to other housing options to maintain flow.
- There is a need for people with serious mental health needs to have better access to mainstream general needs housing and to be supported with floating support, domiciliary care and personal assistants to enable people to live within the community. This could include developing community support networks as a model of support as this would enable people to live in mainstream

accommodation as well as providing support to access community life. In relation to access to mainstream housing to rent and in relation to developing additional supported housing, the role of the District and City Councils in Oxfordshire is crucial in enabling access to these housing options.

- The need amongst people aged 65+ with mental health needs for supported accommodation may be met through the development of the proposed housing pathway above, for example where an older person may benefit from 'step down' supported housing from inpatient settings. Some older people with mental health needs will benefit from access to age designated supported accommodation, such as sheltered/retirement housing and extra care housing.

5. Assessment of need for accessible housing: People with physical disabilities/long term conditions

- 5.01 This part of the needs assessment covers the need for people with physical disabilities/long term conditions for accessible housing, both fully wheelchair adapted housing (typically M4(3) standard) and accessible/adaptable housing (typically to M4(2) standard).
- 5.02 It also includes consideration of the needs of people who have physical disabilities/long term conditions (and also potential sensory disabilities) who also have eligible adult social care needs and may need a form of supported housing as well as adapted housing.

Baseline population and projections

- 5.03 The total number of households⁶⁹ in Oxfordshire is projected to be to be 284,380 in 2024. This number of households, projected to 2044 (316,593 households) and the projected number of households in each district in Oxfordshire from 2024 to 2034, 2039 and 2044 (table 29), are used to inform the estimated level of need for wheelchair adapted housing and accessible housing in Oxfordshire.
- 5.04 Table 28 below shows the estimated number of households in each district in Oxfordshire and aggregated at Oxfordshire level.

Table 28. Current number of households (2024), by each district in Oxfordshire and aggregated for Oxfordshire. Percentage of each district's relative share of households in Oxfordshire.

Local authority area	Number of households (2024)	% of households relative to Oxfordshire total
Cherwell	64,014	22.5%
Oxford City	52,440	18.4%
South Oxfordshire	58,994	20.7%
Vale of White Horse	60,353	21.2%
West Oxfordshire	48,579	17.1%
Oxfordshire (total)	284,380	100%

Source: ONS 2018-based household projections

⁶⁹ ONS 2018-based household projections for England; detailed data for modelling and analysis; principal projection (stage 1 projections).

Table 29. Number of households in Oxfordshire and by each district authority (projected from 2024 to 2044).

District	2024	2029	2034	2039	2044
Cherwell	64,014	66,840	69,343	71,669	74,259
Oxford City	52,440	52,272	52,552	52,648	52,648
South Oxfordshire	58,994	60,647	61,975	63,256	64,365
Vale of White Horse	60,353	63,834	66,764	69,373	71,277
West Oxfordshire	48,579	50,183	51,626	52,990	54,044
Oxfordshire (total)	284,380	293,777	302,260	309,936	316,593

Source: ONS 2018-based household projections

- 5.05 Table 30 shows the number of people with physical and/or sensory disabilities that are eligible for and receiving a funded support package from Oxfordshire County Council. This shows that the majority of these people are older people; it can be anticipated that some of the potential need for both wheelchair adapted homes and for accessible homes amongst this older cohort (and potentially for some working age cohorts with physical/sensory disabilities) will be met through the provision of age designated housing, for example from the use of existing extra care housing and the development of additional extra care housing.
- 5.06 Table 30 shows that 720 adults of working age with a physical disability and/or sensory disability were eligible for and receiving a funded support package from Oxfordshire County Council (2021/22).
- 5.07 It is assumed that this cohort of working age people will be more likely to need an accessible/adapted home (if they don't already live in such a dwelling) rather than supported housing.

Table 30. Number of people requiring physical and sensory support in Oxfordshire eligible for and receiving local authority funded support in 2021/22.

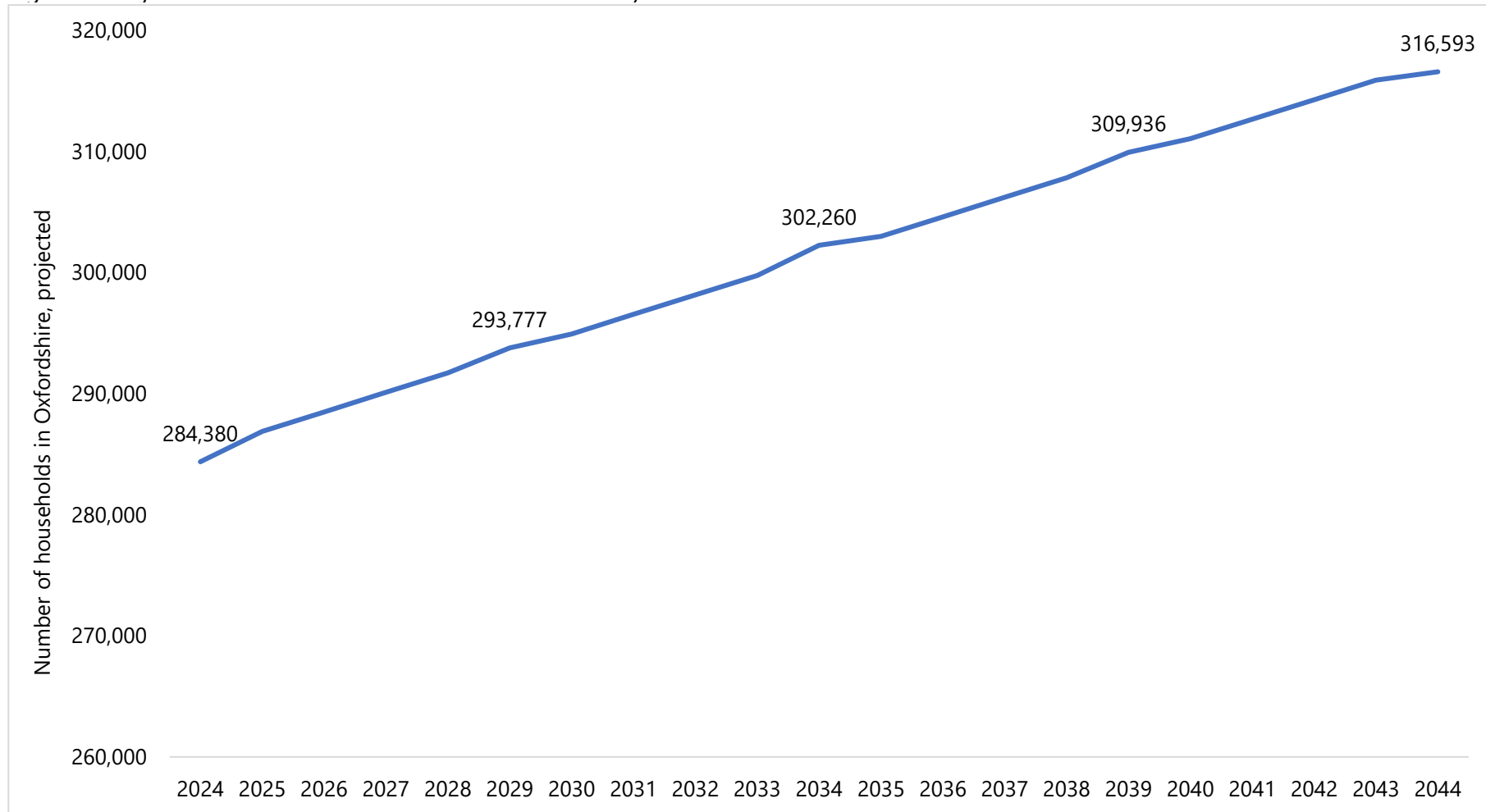
Disability	18-64	65+		
	No. of people	% of total	No. of people	% of total
Physical Support: Access & mobility only	35	4.9%	125	3.6%
Physical Support: Personal care support	675	93.8%	3,305	96.1%
Sensory Support: Support for visual impairment	10	1.4%	10	0.3%
Total	720	100%	3,440	100%
Total (18+)	4,160			

Source: NHS Short and Long-term Support (SALT) (2020/21)

5.08 In order to estimate the need for accessible/adaptable housing and fully adapted wheelchair housing, the number of households in Oxfordshire, for each district been projected forward based on ONS 2018-based projections⁷⁰. This is shown in figure 3 below.

⁷⁰ ONS 2018-based household projections for England; detailed data for modelling and analysis.

Figure 3. Projected number of households in Oxfordshire by 2044.



Source: ONS 2018-based household projections

National and local context

5.09 There are significant cost benefits associated with the provision of wheelchair adapted homes, as demonstrated by Habinteg Housing Association's *Living Not Existing: The Economic and Social Value of Wheelchair User Homes*⁷¹. Key findings indicate:

- For a working age wheelchair user, the benefit of living in an appropriate home is valued at £94,000 over 10 years compared to the average additional build cost of £22,000. This suggests around 4 times the financial benefit compared to cost.
- For a later life wheelchair user household, the 10-year benefit is over £101,000 compared to an additional build cost of £18,000. This suggests around 5 times the financial benefit compared to cost.
- Benefits include increased independence and self-esteem, higher disposable income through greater employment opportunities, reduced need for home modifications, increased social participation, delayed entry into residential care, quicker hospital discharge, and fewer falls at home.
- The report concludes that there is a clear business case for building more wheelchair accessible homes due to the wide-ranging benefits for individuals, families, and society.

5.10 Oxfordshire County Council's 2019 Working Age Adults Needs Assessment⁷² shows the following:

- Oxfordshire (in 2019) had 5,400 care home beds with 2,200 beds for people with physical disabilities, representing c.40% of capacity (at the time).
- As of November 2018, 24,220 people in Oxfordshire of working age were claiming Disability Living Allowance or Personal Independence Payments, up from 22,605 in November 2015 (+7%). Cherwell had the highest number of claimants of districts in Oxfordshire (6,015)

The mix and range of supported accommodation needed to meet people's needs: Evidence from people with physical disabilities/long term conditions and other local stakeholders

5.11 Housing LIN research with people with physical disabilities/long term conditions⁷³ across the UK indicates that:

⁷¹ Habinteg (2023): [Living not existing: The economic and social value of wheelchair user homes](#)

⁷² Oxfordshire JSNA (2019): [Oxfordshire working age adults needs assessment](#)

⁷³ Research (unpublished) undertaken with people with physical disabilities on behalf of local authorities between 2022-2024

- The majority of people with a physical disability would typically prefer to live in adapted mainstream housing with any care/support they require rather than in specialist supported housing.
- People are seeking properties that are a 'home for life' and enable them to live there as long as possible.
- The majority of adaptations required for adults with physical disabilities are grabrails, ramps and level access showers.
- People are also seeking improved access to adaptations that enable them to stay in their current homes. For example, through a better understanding of and access to Disabled Facilities Grants, where they are financially eligible.
- People with physical disabilities may be seeking larger properties as they need space to store equipment and some people may need an extra bedroom for an overnight carer as well as level access requirements.
- Living in areas with good access to shops, amenities and support services is important.

5.12 The evidence of need based on insights from local commissioners indicates that:

- There is an increase in people seeking aids and adaptations and wheelchair adapted properties.
- There is a need for additional bungalow accommodation to be developed as part of the mix of housing types on general needs housing development sites.
- There is a need to make available respite accommodation for some people with physical disabilities/long term conditions.
- There is an ongoing need for housing adapted to both M4(2) and M4(3) standards.

The type and mix of supported accommodation needed to support people's needs: Drawing on supported and accessible housing good practice

5.13 Contemporary good practice in relation to accommodation for people with physical disabilities/long term conditions⁷⁴ recognises people's preference to live in mainstream accommodation rather than supported housing. It is focussed on the provision of accommodation that adheres to national standards for accessible, adaptable dwellings set out in Part M(4), Category 2 and Category 3. Some examples also incorporate various independent standards for accessible housing, including the Lifetime Homes standard.

5.14 For example, Birmingham City Council⁷⁵ has developed its own specification for a housing model suited to a range of people including older people, people with physical

⁷⁴ Specialist and Supported Housing Strategy: Contemporary Practice Guide. Housing LIN 2023

⁷⁵ https://www.local.gov.uk/sites/default/files/documents/BIRMINGHAM%20CITY%20COUNCIL_1.pdf

disabilities and families with a disabled child. This housing model provides two-bedroom 'dormer style bungalows', each with a ground floor bedroom and shower room, a lounge and kitchen and also a second bedroom and bathroom upstairs. This housing type responded to a preference for bungalow accommodation, of which there was a limited supply, with the need to provide accommodation with maximum flexibility that could meet the needs of a variety of households who need accessible homes, including for wheelchair users.

- 5.15 Habinteg Housing Association is an example of a provider that provides accessible housing; they were also pivotal in the development of the Wheelchair Accessible Design Guide⁷⁶. For example, they have partnered with Leeds City Council to develop bespoke wheelchair accessible bungalows and accessible homes to address the shortage of accessible and adaptable family homes for disabled and older residents, and people with complex physical support needs.
- 5.16 Best practice accessible housing has also started to make use of Modular Methods of Construction to provide homes that adapt to people's needs for accessible homes. For example, in Wales, First Choice Housing Association has developed 'Flexi homes'⁷⁷ to enable people with physical disabilities to live in purpose-built, energy-efficient adapted properties that meet their requirements. Panelised or modular units are manufactured off-site and can be easily transported for rapid erection minimising any disruption to the existing property and tenants.
- 5.17 For people that need a supported housing option, good practice suggests the provision of self-contained accommodation with personalised care & support services. For example, Paradise Independent Living in north London⁷⁸ is an example of supported housing for people who may have physical disabilities associated with long term conditions. It comprises 6 units of self-contained supported housing with 24/7 support for people with an acquired brain injury. This provides an intensive and individualised brain injury rehabilitation programme with access to neuro-physiotherapy, neurological occupational therapy, and psychotherapy. The service has Approved Brain Injury Provider Accreditation with Headway, the leading Brain Injury charity.

Estimated future need for accessible housing

- 5.18 The method for estimating the total number of households in Oxfordshire with a need for accessible housing is based on methods derived from two complementary estimation models:

⁷⁶ [Wheelchair Housing Design Guides - Inclusive design for complex needs - Occupational Therapists input on the design of housing - Design - Topics - Resources - Housing LIN](#)

⁷⁷ [Properties | First Choice Housing \(fcha.org.uk\)](#)

⁷⁸ [Supported Living | Paradise Independent Living](#)

- The Horizon Housing model⁷⁹ '*Still minding the step?*' This is used to estimate the number of wheelchair user households that have an unmet housing need for accessible housing.
- The Habinteg Housing Association model;⁸⁰ this is used to estimate the number of households with a need for either fully wheelchair adapted or accessible housing.

5.19 The method outlined in the Horizon Housing model draws upon evidence from:

- The English Housing Survey⁸¹ (EHS), from which the following data has been derived:
 - The proportion of wheelchair users that use a wheelchair exclusively indoors and the equivalent proportion of wheelchair users using a wheelchair exclusively outdoors.
 - Data about unmet accessible housing needs.
- The Scottish Household Survey⁸² (SHS), from which the following has been derived: data about the suitability of accommodation amongst wheelchair user households.

5.20 Data on the number of households in Oxfordshire⁸³ has been used to apply the method derived from the Horizon Housing model to produce local estimates of the number of wheelchair user households and households with need for accessible housing.

5.21 The following steps, have been applied to ONS household data⁸⁴ and the above Horizon Housing⁸⁵ and Habinteg Housing models to produce the estimates of need for wheelchair adapted homes and accessible homes:

- A. The number of wheelchair user households in Oxfordshire is estimated, based on evidence from the Horizon Housing model (table 31) that c.3.6% of all households are wheelchair user households. This is a sum of the estimated number of indoor-only, outdoor-only, and continuous-user wheelchair user households. This is shown in table 31 below.
- B. The number of wheelchair user households that have an unmet housing need is estimated, based on the estimated number of wheelchair user households and evidence from the Horizon Housing model (table 31). This is equivalent to c.20%

⁷⁹ Horizon Housing: Still Minding the step? A new estimation of the housing needs of wheelchair users in Scotland; CIH Scotland.

⁸⁰ Habinteg: Mind the Step: An estimation of housing need among wheelchair users in England.

⁸¹ English Housing Survey 2014/2015: Unsuitable accommodation, by age and tenure. English Housing Survey Home Adaptations Report, 2019-20.

⁸² Scottish Household Survey 2015: Accommodation suitability.

⁸³ ONS 2018-based household projections for England; detailed data for modelling and analysis; stage 1 principal projections

⁸⁴ ONS 2018-based household projections for England; detailed data for modelling and analysis; stage 1 principal projections

⁸⁵ Horizon Housing: Still Minding the step? A new estimation of the housing needs of wheelchair users in Scotland; CIH Scotland.

of the number of wheelchair user households in Oxfordshire. This is shown in table 31.

- C. The number of wheelchair user households that have a need for wheelchair adapted homes (typically to M4(3) standard) is estimated and shown in table 34, step 7. This is based on the Housing LIN’s application of the Habinteg and Horizon models of the need for wheelchair adapted homes and for accessible/adaptable homes (typically to M4(2) standard) and additional evidence available from the Scottish Household Survey, based on evidence on whether a household states a need for adaptations, categorised by tenure of the household⁸⁶.
- D. The estimates of need for accessible/adaptable and fully wheelchair adapted housing have been disaggregated by age, based on evidence from the Habinteg Housing model, where it is assumed that:
 - c.40% of need is for working age adults (WAA); and;
 - c.60% of need is for people aged 65+
- E. The above steps have been modelled for:
 - Oxfordshire, projected to 2044;
 - Each of Oxfordshire’s districts, projected to 2044.

5.22 Table 32 shows the individual steps applied to the data from the sources in table 31 below, This is based on steps A, B and C above, which have been applied in order to estimate:

- The number of wheelchair user households in Oxfordshire; and
- The number of wheelchair user households with a need for fully wheelchair adapted homes and the number of households with a need for accessible/adapted homes.

Table 31. Data and sources used to estimate the need for accessible housing: fully wheelchair accessible housing (to 2044)

Data related to wheelchair user households	Percentage / value	Source
Number of households (2044)	316,593 (Oxfordshire total)	ONS 2018-based household projections
Percentage of households that have at least one wheelchair user	3.6%	Scottish Household Survey
Percentage of total households that use a wheelchair exclusively outdoors	2.3%	English Housing Survey
Percentage of total households where a wheelchair user uses a wheelchair exclusively indoors	0.4%	English Housing Survey
Percentage of total households where a wheelchair user uses a wheelchair all of the time	0.9%	English Housing Survey

⁸⁶ Scottish Household Survey 2019 – Table 3.14c. Sample size: 2,080 households

Percentage of wheelchair user households (outdoor and/or continuous use) with an unmet housing need	19.1%	English Housing Survey
Percentage of wheelchair user households (indoor use only) with a need for accessible housing	25.6%	Scottish Household Survey

Source: Horizon Housing: Still Minding the step? & ONS 2018-based household projections.

Table 32. Method of estimating the number of households in Oxfordshire with need for fully wheelchair adapted homes and accessible/adapted homes; by 2044.

Application of Horizon Housing⁸⁷ method	Oxfordshire estimate (2044)
Total number of households	316,593 households
1. Estimated number of indoor-only wheelchair user households	0.4% x 316,593 households = 1,266
2. Estimated of outdoor-only wheelchair user households	2.3% x 316,593 = 7,282
3. Estimated number of wheelchair user households where the user uses the wheelchair continuously	0.9% x 316,593 = 2,849
Total estimated number of wheelchair user households (aggregation of steps 1 to 3)	11,397 wheelchair user households (3.6% of total number of households)
4. Estimated unmet housing need among indoor-only wheelchair user households	25.6% x 1,266 = 324
5. Estimated unmet housing need among outdoor-only wheelchair user households	19.1% x 7,282 = 1,391
6. Estimated unmet housing need among wheelchair user households using wheelchairs continuously	19.1% x 2,849 = 544
7. Estimated need for fully wheelchair adapted homes	324 + 1,391 + 544 = 2,259 wheelchair user households with a need for fully wheelchair adapted homes (c.20% of total number of wheelchair user households)

N.B the figures in this table may marginally differ to those in following tables due to rounding.

- 5.23 The estimated need for fully wheelchair adapted homes and accessible/adaptable homes has been estimated for each district area.
- 5.24 In addition to fully wheelchair adaptable housing, there is likely to be an additional and more significant need for accessible/adaptable housing (i.e. similar to Part M(4) Category 2 broadly equivalent to the Lifetime Homes standard).
- 5.25 Evidence from the Scottish Household Survey (SHS)⁸⁸ shows the number of households that, at the time of the survey, needed an adaptation (accessible housing) where there is at least one individual living there with limitations to their daily activities.

⁸⁷ Horizon Housing: Still Minding the step? A new estimation of the housing needs of wheelchair users in Scotland; CIH Scotland.

⁸⁸ Scottish Government: [Scottish Household Survey](#)

5.26 Where other, more recent English Housing Survey data is not readily available⁸⁹, the SHS may be used to inform the likely prevalence of accessible/adaptable housing need in Oxfordshire, where the assumption made is that Oxfordshire’s accessible housing preferences/needs may resemble the overall household preferences/needs from the SHS.

5.27 The following table provides survey findings from the SHS on whether a household has stated a need for adaptations where the household member will benefit from being able to carry out daily necessary activities.

Table 33. Limiting activities by tenure - Whether the home requires adaptations to make it easier to go about daily activities (2019).

Tenure category	Percentage that stated that they need an adaptation	Percentage that stated they don't need an adaptation	Percentage that didn't know if they needed an adaptation or not
Owner occupier	9%	91%	0%
Private Rent	6%	93%	1%
Social rented	23%	76%	1%

N.B. Percentages in each row may not add up to 100 – due to rounding.

Source: Scottish Household Survey 2019 – Table 3.14c. Sample size: 2,080 households.

5.28 To produce these estimates, the following data has been used:

- Scottish Household Survey (2019): Limiting activities by tenure - Whether the home requires adaptations to make it easier to go about daily activities.
- ONS 2021 census⁹⁰: Number of households in Oxfordshire, by tenure type.

5.29 The following tables shows the tenure of households in each district in Oxfordshire⁹¹, and the estimated number of households that may require a form of accessible/adaptable housing.

5.30 In order to estimate the number of households by tenure, that may require an adapted/accessible home, the percentage of households, across each tenure from the SHS (2019) that stated a need for an adaptation has been multiplied by the number of households for each tenure type in Oxfordshire, as recorded from the 2021 census.

5.31 The table below shows the tenure status of each district in Oxfordshire⁹², which is used to inform the estimates of accessible housing, according to the evidence in Table 30

⁸⁹ This is based on other data not being available regarding the specific preferences/ needs of households with respect to the household indicating some need for accessible/adaptable housing. NB in relation to the English Housing Survey, for which the same specific/detailed information on need for accessible/adaptable housing is not readily available.

⁹⁰ ONS 2021 census: RM201 - Tenure by age - Household Reference Persons

⁹¹ ONS 2021 census: RM201 - Tenure by age - Household Reference Persons

⁹² ONS 2021 census: custom dataset – household tenure by local authority.

Table 34. Tenure status of households in Oxfordshire, by district. ONS 2021 census.

Household by tenure	Cherwell	Oxford City	South Oxfordshire	Vale of White Horse	West Oxfordshire
Owner occupier households	44,092	25,828	44,309	40,267	33,040
Private renting households	13,060	17,856	9,804	9,026	8,578
Social renting households	8,742	11,554	7,387	8,205	6,365
Total (all households)	65,894	55,238	61,500	57,498	47,983

Source: ONS 2021 census

5.32 There is a similar ratio of homeownership among 4 of the 5 districts, with exception to Oxford City, which has a more significant level of private renting and social renting households.

5.33 Table 35 below shows the findings from the SHS, which show preference/need, household tenure of respondents, for adapted/accessible housing, applied to Oxfordshire.

Table 35. Estimated number of households, by tenure, that may require accessible/adapted housing in Oxfordshire, by district.

Tenure category	Percentage that stated that they need an adaptation (applied from SHS)
Owner occupier	9%
Private rented or live rent free	6%
Rented: Social rented	23%

Source: Scottish Household Survey (2019)

5.34 Table 36 below shows the data from the SHS (table 35) applied to the future projected tenure (projected to 2044), to show the estimated need for accessible/adapted housing by 2044, disaggregated by each district and for each tenure type.

Table 36. Estimated projected need (by 2044) for accessible/adapted housing - M4(2) for each district in Oxfordshire, based on SHS evidence and household tenure status.

Local authority	Cherwell	Oxford City	South Oxfordshire	Vale of White Horse	West Oxfordshire	Oxfordshire
Owner occupier households	4,731	2,304	4,440	4,438	2,832	18,744
Private renting households	934	1,062	655	663	490	3,804
Social renting households	2,397	2,634	1,891	2,311	1,394	10,627
Total (all households)	8,062	5,999	6,986	7,412	4,717	33,175

Source: ONS 2021 census and SHS (2019)

5.35 The above table shows an estimated c.33,200 households with a need for an accessible/adaptable home by 2044.

5.36 The estimated need for accessible/adapted housing, projected for each 5-year period to 2044 is based on the projected growth among the number of households in Oxfordshire from the ONS 2018-based household projections⁹³ by 2044.

5.37 The 2044 projected need is then used to produce a per annum estimated need (for fully wheelchair adapted homes and accessible homes), which is projected to 2029, 2034 and 2039. This is shown in Table 37 below, for Oxfordshire⁹⁴.

Table 37. Projected estimated need for accessible/adapted housing in Oxfordshire, for each 5-year period to 2044 (dwellings)

Need: by tenure	Per annum need	By 2029	By 2034	By 2039	By 2044
Estimated need for fully wheelchair adapted housing: M4(3)(total)	113	565	1,130	1,694	2,259
Of which are for working age adults (WAA)	45	226	452	678	904
Of which are for 65+	68	339	678	1,016	1,355
Estimated need for accessible/adapted housing: M4(2)	1,659	8,294	16,588	24,881	33,175
Of which are for owner occupied homes	937	4,686	9,372	14,058	18,744

⁹³ ONS 2018-based household projections for England; detailed data for modelling and analysis; released in 2020.

⁹⁴ In the subsequent tables, totals may not sum due to rounding.

Need: by tenure	Per annum need	By 2029	By 2034	By 2039	By 2044
Of which are for private rented homes	190	951	1,902	2,853	3,804
Of which are for social rented homes	530	2,657	5,314	7,970	10,627

Source: SHS (2019), ONS 2018-based household projections for England, ONS 2021 census

5.38 The equivalent estimates of need for adapted and accessible homes, projected forward to 2044, for each district authority is shown in the tables below (tables 38 to 42).

Table 38. Projected estimated need for accessible/adapted housing in Cherwell, by tenure type for each 5-year period to 2044 (dwellings)

Need: by tenure	Per annum need	By 2029	By 2034	By 2039	By 2044
Estimated need for fully wheelchair adapted housing: M4(3)(total)	26	132	265	397	530
Of which are for WAA	11	53	106	159	212
Of which are for 65+	16	79	159	238	318
Estimated need for accessible/adapted housing: M4(2)	403	2,015	4,031	6,046	8,062
Of which are for owner occupied homes	237	1,183	2,365	3,548	4,731
Of which are for private rented homes	47	234	467	701	934
Of which are for social rented homes	120	599	1,198	1,798	2,397

Source: SHS (2019), ONS 2018-based household projections for England, ONS 2021 census

Table 39. Projected estimated need for accessible/adapted housing in Oxford City, by tenure type for each 5-year period to 2044 (dwellings)

Need: by tenure	Per annum need	By 2029	By 2034	By 2039	By 2044
Estimated need for fully wheelchair adapted housing: M4(3)(total)	19	94	188	282	376
Of which are for WAA	8	38	75	113	150
Of which are for 65+	11	56	113	169	225
Estimated need for accessible/adapted housing: M4(2)	300	1,500	3,000	4,499	5,999

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Need: by tenure	Per annum need	By 2029	By 2034	By 2039	By 2044
Of which are for owner occupied homes	115	576	1,152	1,728	2,304
Of which are for private rented homes	53	265	531	796	1,062
Of which are for social rented homes	132	658	1,317	1,975	2,634

Source: SHS (2019), ONS 2018-based household projections for England, ONS 2021 census

Table 40. Projected estimated need for accessible/adapted housing in South Oxfordshire, by tenure type for each 5-year period to 2044 (dwellings)

Need: by tenure	Per annum need	By 2029	By 2034	By 2039	By 2044
Estimated need for fully wheelchair adapted housing: M4(3)(total)	23	115	230	344	459
Of which are for WAA	9	46	92	138	184
Of which are for 65+	14	69	138	207	276
Estimated need for accessible/adapted housing: M4(2)	349	1,746	3,493	5,239	6,986
Of which are for owner occupied homes	222	1,110	2,220	3,330	4,440
Of which are for private rented homes	33	164	327	491	655
Of which are for social rented homes	95	473	946	1,419	1,891

Source: SHS (2019), ONS 2018-based household projections for England, ONS 2021 census

Table 41. Projected estimated need for accessible/adapted housing in Vale of White Horse, by tenure type for each 5-year period to 2044 (dwellings)

Need: by tenure	Per annum need	By 2029	By 2034	By 2039	By 2044
Estimated need for fully wheelchair adapted housing: M4(3)(total)	25	127	254	381	509
Of which are for WAA	10	51	102	153	203
Of which are for 65+	15	76	153	229	305

Need: by tenure	Per annum need	By 2029	By 2034	By 2039	By 2044
Estimated need for accessible/adapted housing: M4(2)	371	1,853	3,706	5,559	7,412
Of which are for owner occupied homes	222	1,109	2,219	3,328	4,438
Of which are for private rented homes	33	166	332	497	663
Of which are for social rented homes	116	578	1,155	1,733	2,311

Source: SHS (2019), ONS 2018-based household projections for England, ONS 2021 census

Table 42. Projected estimated need for accessible/adapted housing in West Oxfordshire, by tenure type for each 5-year period to 2044 (dwellings)

Need: by tenure	Per annum need	By 2029	By 2034	By 2039	By 2044
Estimated need for fully wheelchair adapted housing: M4(3)(total)	19	96	193	289	386
Of which are for WAA	8	39	77	116	154
Of which are for 65+	12	58	116	174	231
Estimated need for accessible/adapted housing: M4(2)	236	1,179	2,358	3,538	4,717
Of which are for owner occupied homes	142	708	1,416	2,124	2,832
Of which are for private rented homes	25	123	245	368	490
Of which are for social rented homes	70	349	697	1,046	1,394

Source: SHS (2019), ONS 2018-based household projections for England, ONS 2021 census

5.39 Table 43 below summarises the future projected estimates of need, for Oxfordshire, by 2044 – for fully wheelchair adapted homes and accessible/adaptable homes, and for each district authority.

Table 43. Estimates of need by 2044, for accessible homes and for fully wheelchair adapted homes. Disaggregated by district authority, and by working age adults (WAA) and people aged 65+.

Local authority	Need for accessible homes			Need for fully wheelchair adapted homes		
	WAA	65+	Total	WAA	65+	Total
Cherwell	3,225	4,837	8,062	212	318	530
Oxford City	2,400	3,599	5,999	150	225	376
South Oxfordshire	2,794	4,192	6,986	184	276	459
Vale of White Horse	2,965	4,447	7,412	203	305	509
West Oxfordshire	1,887	2,830	4,717	154	231	386
Oxfordshire (total)	13,270	19,905	33,175	904	1,356	2,259

5.40 The need for accessible/adapted homes and fully wheelchair adapted homes are shown in table 44 below, for each District and for Oxfordshire projected to 2029/30, 2034/35, 2039/40 and to 2044/45.

Table 44. Requirements for accessible homes and fully wheelchair adapted homes by district in Oxfordshire and aggregated at Oxfordshire level, projected forward to 2044

Local authority	2029 need	2034 need	2039 need	2044 need				
	Fully wheelchair adapted homes	Accessible/ adapted homes	Fully wheelchair adapted homes	Accessible/ adapted homes	Fully wheelchair adapted homes	Accessible/ adapted homes	Fully wheelchair adapted homes	Accessible/ adapted homes
Cherwell	132	2,015	265	4,031	397	6,046	530	8,062
Oxford City	94	1,500	188	3,000	282	4,499	376	5,999
South Oxfordshire	115	1,746	230	3,493	344	5,239	459	6,986
Vale of White Horse	127	1,853	254	3,706	381	5,559	509	7,412
West Oxfordshire	96	1,179	193	2,358	289	3,538	386	4,717
Oxfordshire (total)	565	8,294	1,130	16,588	1,694	24,881	2,259	33,175

Summary: Oxfordshire

5.41 In total, across Oxfordshire, the overall level of need with respect to fully wheelchair adapted homes and accessible homes is shown in the table below. This is based on an aggregation of the district authority estimated need for adapted and accessible homes, shown in previous tables.

5.42 Table 45 shows the estimates of need for fully wheelchair adapted homes and accessible homes for Oxfordshire to 2034, 2039 and 2044.

Table 45. Need for accessible homes and fully wheelchair adapted homes in Oxfordshire by 2039 and 2044

Type of accessible / adapted home	Estimated need (homes) (2034)	Estimated need (homes) (2039)	Estimated need (homes) (2044)
Accessible homes	16,588	24,881	33,175
WAA	6,635	9,952	13,270
65+	9,953	14,929	19,905
Fully wheelchair adapted homes	1,130	1,694	2,259
WAA	452	678	904
65+	678	1,016	1,356

5.43 In summary, by 2034, it is estimated that the need for accessible housing will be:

- c.16,558 *accessible homes* (i.e. not fully wheelchair adapted dwellings), similar to Part M(4) Category 2, broadly equivalent to the Lifetime Homes standard.
- This is the equivalent of a need for c.1,655 accessible homes required per year to 2034 for the all-age population.
- Among the working-age population, this is the equivalent of a need for c.665 accessible and adapted homes required per year to 2034.
- c.1,130 *fully wheelchair adapted homes*, i.e. similar to Part M(4) Category 3 broadly equivalent to the Wheelchair Housing Design standard.
- This is the equivalent of a need for c.113 fully wheelchair-adapted homes required per year to 2044, for the all-age population.
- For the working age population, this is the equivalent of a need for c.45 fully wheelchair-adapted homes required per year to 2044.

5.44 In summary, by 2044, it is estimated that the need for accessible housing will be:

- c.33,200 *accessible homes* (i.e. not fully wheelchair adapted dwellings), similar to Part M(4) Category 2, broadly equivalent to the Lifetime Homes standard.
- This is the equivalent of a need for c.1,660 accessible and adapted homes required per year to 2044 for the all-age population.
- Among the working-age population, this is the equivalent of a need for c.664 accessible and adapted homes required per year to 2044.

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- c.2,260 *fully wheelchair adapted homes*, i.e. similar to Part M(4) Category 3 broadly equivalent to the Wheelchair Housing Design standard.
- This is the equivalent of a need for c.113 fully wheelchair-adapted homes required per year to 2044, for the all-age population.
- For the working age population, this is the equivalent of a need for c.45 fully wheelchair-adapted homes required per year to 2044.

5.45 It is anticipated that estimated need for accessible homes would be met through a mix of adaptations to existing homes (both self-funded and funded through Disabled Facilities Grants) and from new build housing, both social and market housing, built to M4(2) and M4(3) standards.

6. Assessment of need for supported housing: Vulnerable young people (care leavers and unaccompanied asylum seekers)

- 6.01 This section of the supported housing need assessment covers the need for supported housing that is designated for vulnerable young people.
- 6.02 Vulnerable young people in this context are primarily care leavers and unaccompanied asylum seekers (i.e. young people for whom the council has corporate parenting responsibilities). There is also reference to 16–17-year-olds who are homeless, or are at risk of, homelessness.

Baseline population and projections

- 6.03 Data from the Department for Education/Oxfordshire County Council⁹⁵ indicates that the number of care leavers in Oxfordshire was 460 people in 2023. It is assumed that unaccompanied asylum seekers are counted within the care leaver population as they are young people for whom the council has corporate parenting responsibilities.
- 6.04 The method for projecting forward the vulnerable young people (i.e. care leavers and unaccompanied asylum seekers) population is based on DfE data⁹⁶ showing the trend of care leavers recorded in Oxfordshire from 2019 to 2023. It shows that the number of care leavers in Oxfordshire has grown from 377 in 2019 to 460 in 2023, an increase of c.22% over this period.
- 6.05 However, evidence from commissioners for services for care leavers is that the overall number of children in care (excluding UASC) in Oxfordshire is decreasing; from c.900 children in care in 2019/20 to c.700 children in care in 2023/24. This evidence suggests that the number of care leavers is likely to decrease over time. The number of UASC under 18 years old as of July 2024 is 95 this is likely to increase due to the demand from the Home Office National Transfer Scheme, which is attributing to the increases in number of care leavers aged 18+.
- 6.06 Evidence from commissioners suggests that overall, the population of care leavers is currently trending slightly upwards. The 'indigenous' population of care leavers is relatively stable but the number of unaccompanied asylum-seeking children living in Oxfordshire is increasing.
- 6.07 On the basis of this evidence, i.e. of the overall number of children in care decreasing whilst the numbers of unaccompanied asylum-seeking children living in Oxfordshire is increasing, it has been assumed that over the next 5 years the care leaver population will remain consistent at c.460 per annum.

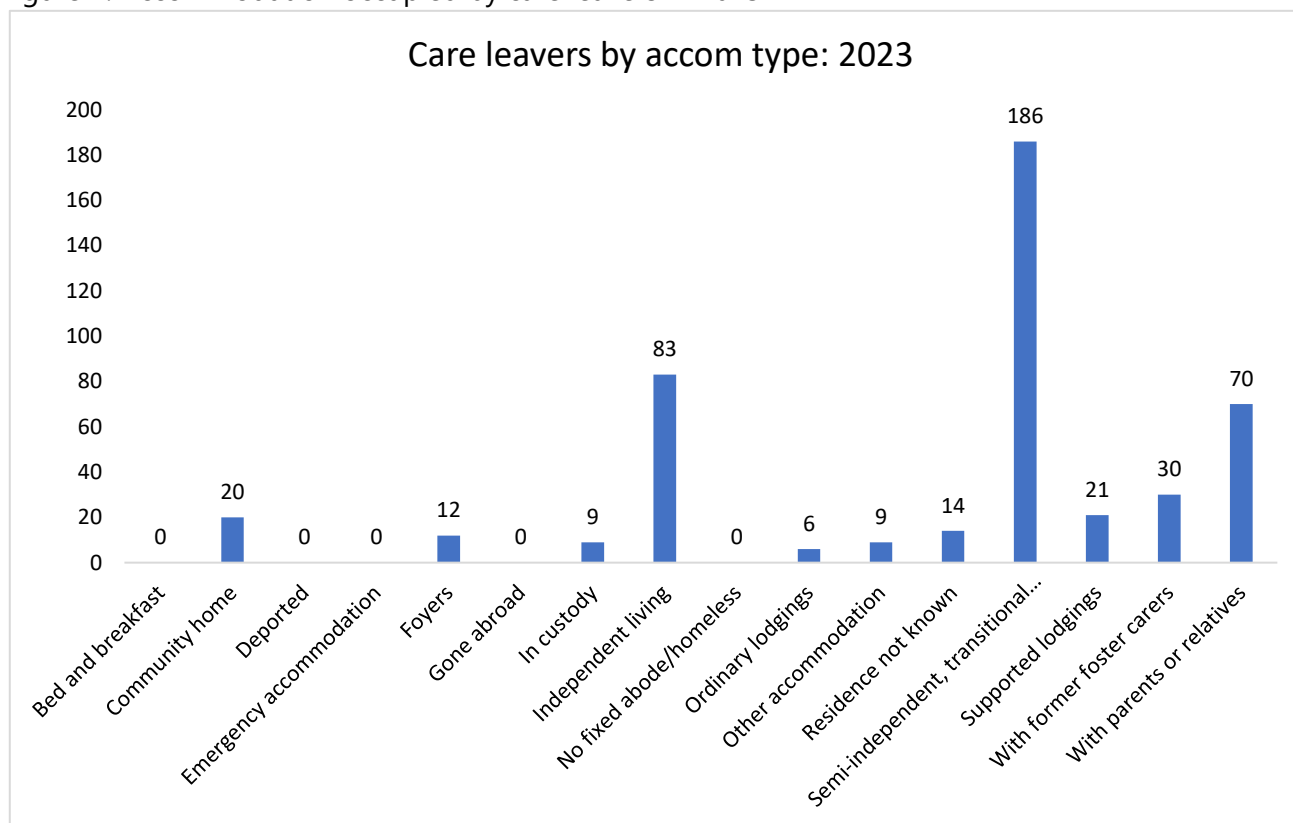
⁹⁵ DfE: Children looked after in England including adoptions: Reporting year 2023.

⁹⁶ DfE: Children looked after in England including adoptions: Reporting year 2023.

Current supply of supported housing/accommodation

6.08 Figure 5 below shows the use of different types of accommodation occupied by care leavers in 2023.

Figure 4. Accommodation occupied by care leavers in 2023



Source: DfE: Children looked after in England including adoptions: Reporting year 2023.

6.09 Data provided by Oxfordshire County Council indicates that there is a total of 270 units of supported housing for care leavers and other vulnerable young people.

6.10 There are 238 units of supported housing provided through the Young Person's Supported Accommodation block contract. The current breakdown of the provision of YPSA accommodation is shown in Table 46. **Error! Reference source not found..**

Table 46. YPSA provision by service package (2023/24).

Service Package	Locality area	Number of beds	Organisation
SP1 - 16/17 Shared (up to 4 young people sharing aged 16/17 years)	Cherwell	14	Response (Housing Management) & OCC in-house (Support)
	West Oxfordshire	8 ⁹⁷	
	Oxford City	28	

⁹⁷ Variation agreed – can source within City & Cherwell

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Service Package	Locality area	Number of beds	Organisation
	South Oxfordshire	7 ⁹⁸	
	Vale of White Horse	7	
	e-bed	4	
	TOTAL	68	
SP2 - Unaccompanied Children and Young People Welcome Assessment Houses	Cherwell	4	Response (Housing Management) & OCC in-house (Support)
	Oxford City	8	
	TOTAL	12	
SP5 - 18+ Shared (up to 4 young people sharing aged 18-24 years)	Cherwell	28	Response and Oxfordshire Youth
	West Oxfordshire	12	
	Oxford City	60	
	South Oxfordshire	4	
	Vale of White Horse	13 ⁹⁹	
	e-bed	2	
	TOTAL	119	
SP6 - 18+ Single Self-Contained (for young people aged 18-24 years where it is not safe for them to live with others)	Cherwell	6	Connection Support
	West Oxfordshire	3	Stonewater
	Oxford City	10	Connection Support
	South Oxfordshire	6	Connection Support
	Vale of White Horse	3	Stonewater
	TOTAL	28	
SP7 - Parents (for one or both parents aged 16-24 years old with their child(ren))	Cherwell	10	Sanctuary Housing
	West Oxfordshire	5	A2 Dominion
	Oxford City	10	A2 Dominion
	South Oxfordshire	5	A2 Dominion
	Vale of White Horse	5	Stonewater
	TOTAL	35	
Service Package	Locality area	Number of beds	Organisation
SP8 - Out & In County (16–24-year-olds at risk of exploitation)	Out of county/Oxfordshire	10	Connection Support
	TOTAL	10	
SP9 - 18+ Shared (up to 6 young people)	South	10	Homegroup

⁹⁸ Variation agreed – can source within City & Cherwell

⁹⁹ Variation agreed – can source within Oxfordshire

Service Package	Locality area	Number of beds	Organisation
sharing aged 18-24 years)	e - bed	1	
	TOTAL	11	

- 6.11 Excluding SP7 (young parents) and SP8 (out of and in county risk of exploitation placements), there is a total of 238 units available through the SP1, SP2, SP5, SP6 and SP9.
- 6.12 The YPSA supported housing does not include 24/7 support. This is an issue that commissioners are seeking to address through procuring a new Framework for Supported Accommodation (16-25 years).
- 6.13 Foyers: there are 2 foyer services for 16-17 UASC in Oxfordshire currently:
- Abingdon 11 units.
 - Oxford: 21 units.
- 6.14 The foyers provide 24/7 support and consequently there is relatively little anti-social behaviour associated with these supported housing services.
- 6.15 Based on data from commissioners, there are currently 30 move-on housing units available for use by 18+ y/o UASC care leavers moving on from supported housing commissioned to an external Registered Provider.
- 6.16 Evidence from commissioners in relation to the current supply of supported housing indicates the following issues and characteristics.
- 6.17 There have been c.25 voids in YPSA supported housing (2022/23) due to the service not being able to accommodate/support care leavers with higher support needs.
- 6.18 There are 'bottlenecks' in supported housing caused by a lack of availability of suitable and affordable independent housing for care leavers and vulnerable young people aged 18+ to move on to from supported housing, due to the lack of supply of 1 bedroom accommodation via the district and city council housing allocation schemes.
- 6.19 There is a requirement for additional supported housing that provides 24/7 for young people with the most complex support needs, particularly in Banbury, Oxford, Didcot and Bicester.
- 6.20 Based on feedback from commissioners, most young people stay for approximately up to 24 months in supported housing.

The type of supported accommodation needed: Local context and commissioner insights

- 6.21 Qualitative engagement with local stakeholders indicates that the quality and standard of supported housing for young people varies.
- 6.22 The majority of supported housing through the YPSA contract is provided as shared supported housing.
- 6.23 Local commissioners are keen to have an increased proportion of supported housing in self-contained units to avoid issues and tensions caused by young people living in shared accommodation.
- 6.24 Discussions with local commissioners has identified that the needs of vulnerable young people are becoming increasingly complex, for example young people are presenting with drug/alcohol related support needs, offending related needs, complex mental health needs as well as an increase in autism diagnoses.
- 6.25 Local commissioners have identified that foyers are effective in supporting vulnerable young people aged 16-17 (due to the provision of 24/7 staffing) and there is an increasing need for foyer provision across the county.
- 6.26 A lack of available and affordable move-on housing is preventing some vulnerable young people moving from supported housing settings into mainstream accommodation when they need it. In most cases, move-on accommodation needs to be provided as one-bedroom flats. Facilitating improved 'throughput' would free-up supported housing capacity for more young people.
- 6.27 There is a need for more affordable housing, particularly in the social housing sector and private rented that can provide 'move-on' accommodation for vulnerable young people who may want to work.
- 6.28 Commissioner views/perspectives in relation to evidence of current and future need for supported housing for care leavers indicates the following.
- An additional 4 foyers are required in Oxfordshire, preferably in Banbury, Oxford, Didcot and Bicester (for 8-12 units).
 - There is a need to remodel the YPSA supported accommodation contracts in line with contract end date of October 2025 to provide more services for 16-17 year olds that include 24/7 support).
 - There is no desire for additional shared supported housing, particularly with less than 24/7 support, as this often creates tensions between young people living in shared housing settings. During the commissioning exercise it is proposed that we may wish to reduce the number of shared houses for 16-17 year olds.
 - There is a need for supported housing for young people with mental health needs. This need is being addressed through a proposed supported housing service of 9 units in Oxford from 2025 funded through a DLUCH SHAP bid.
 - There is a need for improved joint working with the District / City Councils in relation to 16/17 year-olds who come into care. There is a need for an agreement between OCC and the District councils in relation to joint assessments of 16/17

year olds who are homeless/at risk of homelessness and a jointly agreed supported housing pathway and joint funding for supported housing required by this cohort of vulnerable young people. There is also a requirement to provide early help and mediation to prevent children from being evicted from the parental home from both Children's Social Care and the district/ city councils.

- There is a requirement for additional move on independent housing to free up capacity in supported housing, particularly affordable housing in the social rented sector. This would help to create a more responsive 'housing pathway' for care leavers including:
 - Additional 24/7 supported housing, at up to 4 foyers for 16-17 year olds through remodelled YPSA accommodation.
 - Supported housing for young people who experience multiple disadvantage, and have complex needs including mental health needs.
 - Supported housing (with lower levels of support) for young people who need a semi-independent but supported housing setting.
 - A range of move-on housing options, with visiting floating support as required.

Contemporary practice in supported housing for young people

- 6.29 Contemporary practice in relation to supported accommodation for young people provides examples that have provision of self-contained and shared accommodation with shared communal spaces/facilities. Practice examples also tend to provide an enhanced, often trauma informed, support service and enable young people to access education and employment as well as providing access to health services and a range of advocacy services. Some examples are provided below.
- 6.30 The YMCA Western Gateway in West Bromwich was refurbished in 2017 and includes a café, coffee bar, five enterprise starter units, a fitness and well-being centre, learning centre, youth zone and chapel as well as 96 studio apartments and a range of office accommodation for social businesses. It provides support to young people to access education, training and employment.

Figure 5. YMCA Western Gateway in West Bromwich



6.31 For 16–17-year-olds who are homeless, Teresa House is a supported housing scheme in Enfield, run by Christian Action Housing, that accommodates 13 young people for up to 6 months with 24/7 support. Each resident has their own bedroom in 2-3 bedroom flats. The accommodation has a communal lounge, leisure facilities and IT/learning suites. Whilst at the scheme the young person's housing and support needs are continually assessed to enable them to move onto appropriate accommodation.

Figure 6. Teresa House, Enfield



6.32 Heather Court Foyer, in Romford, run by Swan Care and Support provides supported accommodation for single young people aged 16 to 25 who are in housing need and require support to acquire the skills to live independently. The scheme consists of 15 one-bedroom flats, of which one flat is adapted to meet disability needs. All the flats are fully furnished with access to a communal lounge. The scheme is staffed 24/7. Each

resident has a dedicated support worker. Heather Court offers a range of support, including: advocacy on advice on welfare/housing benefits, budgeting and maximising income, independent living skills, health and wellbeing issues, motivation and confidence building, move on and resettlement services.

Figure 7. Heather Court Foyer, in Romford



6.33 Hope Rise in Bristol¹⁰⁰ is an innovative mixed community of young people (18-35) in a development of 11 ZED PODS (zero carbon, modular starter homes) that was delivered by Bristol City Council in partnership with Bristol Housing Festival, ZED PODS and the local YMCA. The project provides move-on accommodation for young people living in short-term emergency accommodation and enables people to learn to live independently but with the support of a community of neighbours. It comprises nine one-bedroom homes constructed of cross-laminated timber (CLT), bookended by two two-bedroom homes constructed of light-gauge steel.

Figure 8. Hope Rise in Bristol



¹⁰⁰ https://www.zedpods.com/files/ugd/dfc637_d7debf059bf04eb391899127bbf4fdc1.pdf

6.34 White's Row is operated by One Housing in Tower Hamlets. It provides supported housing for vulnerable young people aged 16 to 21 years who are homeless or at risk of becoming homeless. The service can accommodate up to 12 young people. Residents have their own room and share a kitchen and bathroom with a small number of other customers. There are also two 'crashpads' which can be used for up to 2 days as emergency accommodation for young people. There is communal space for residents to use on the ground floor along with a small, secure outside space at the rear of the building. All referrals come from London Borough of Tower Hamlets. The service is staffed 24/7 with a member of support staff 'sleeping in' overnight.

Estimated future need for supported housing and move-on housing

6.35 To project the level of future need for supported housing for vulnerable young people (specifically in relation to care leavers and unaccompanied asylum seekers) in Oxfordshire average waiting list and length of stay data from commissioners for supported housing has been used.

6.36 The estimates also are based on the contextual and qualitative evidence set out previously.

6.37 In 2023/24, there was c.270 units of block contracted supported housing for vulnerable young people (including care leavers and unaccompanied asylum seekers) made up of:

- Foyers in Abingdon and Oxford: 32 units
- YPSA accommodation:
 - (a) SP1 68 units
 - (b) SP2 12 units
 - (c) SP5 119 units
 - (d) SP6 28 units
 - (e) SP9 11 units
 - (f) Total YPSA 238 units.

6.38 In relation to the need for move-on housing for young people leaving supported housing, the following assumptions have been made.

6.39 The majority of young people leaving supported housing will require move-on housing. Based on the Housing LIN's experience of undertaking similar supported housing need assessments it is assumed that c.70% of young people leaving supported housing will require move-on housing (other moves may be to, for example, other supported housing, supported lodgings, family home, etc).

- 6.40 The majority of young people needing move on housing require single person self-contained 1-bed accommodation.
- 6.41 The average length of stay in supported housing settings is c.24 months.
- 6.42 There are currently 30 housing units available for move on from supported housing for 18+ UASC (paragraph 6.15).
- 6.43 The need for additional move-on housing for people leaving supported housing has been calculated in Table 47. This identifies a need for an **additional c.65 units of mainstream move-on housing per annum being required**. This is likely to require a review of move-on housing arrangements with existing housing partners.

Table 47. Estimate of need for move-on housing for young people leaving supported housing (2023/24).

Baseline assumptions	
Units of supported housing available	270 units
Average length of stay in supported housing	c.24 months
Percentage of young people leaving supported housing assumed to require move-on housing	70%
Number of young people requiring move-on housing	189 young people (270 x 70%) over 24-month period
Number of young people requiring move-on housing (per annum)	Estimated need is equivalent to 8 young people requiring move-on housing per month (189/24 months)
	Estimated need equivalent to 96 young people requiring move-on housing per annum (8 x 12 months)
Estimated need for move on housing	
	Overall need: c.96 units of move-on housing required per annum.
	Net need: c.66 units of move-on housing units required per annum (96 units – 30 units of existing move-on housing)

- 6.44 In relation to estimated need for supported housing the following assumptions have been made.
- 6.45 The population of care leavers is assumed to be c.460 per year for the next 5 years (paragraph 6.07 **Error! Reference source not found.**).
- 6.46 The average length of stay in supported housing settings is c.24 months.
- 6.47 Evidence from OCC Brokerage is that the average waiting list (i.e. referrals for supported housing that cannot be accommodated due to a lack of capacity) for young person’s supported housing is c.95 people. Evidence from Brokerage is that this size of waiting list is consistent over time. Based on the Housing LIN’s experience of undertaking similar supported housing need assessments it is assumed that c.70% of young people waiting for access to supported housing will require this type of accommodation (other moves may be to, for example, mainstream housing,

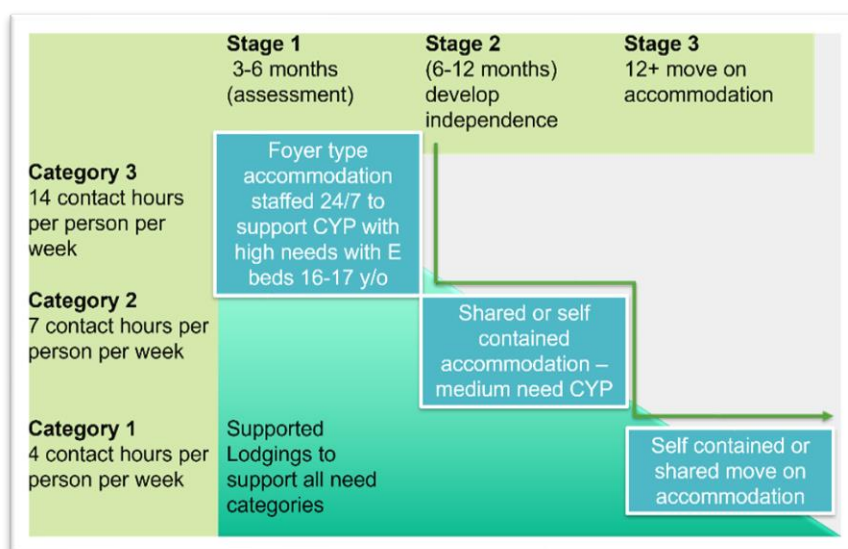
supported lodgings, return to family home, etc). This suggests that the unmet need for supported housing due to current capacity limitations is c.65 young people (i.e. 95 young people on waiting list x 70% = 67 people).

- 6.48 There are assumed to be c.25 voids in YPSA supported housing due to the service being unable to accommodate young people with high support needs.
- 6.49 Based on the current average length of stay (throughput) in supported housing remaining at c.24 months, this suggests that to meet demand for supported housing, there is a need for **an additional 90 units of supported housing** (to satisfy need that is currently unmet, as evidenced by the average waiting list for supported housing, and the number of voids in existing supported housing services due to the service not being able to accommodate young people with higher support needs).
- 6.50 It is assumed that as part of the overall need for 90 additional units of supported housing, there is a need for a minimum of 25 additional units of supported housing with 24/7 support available to meet the needs of young people with higher/complex support needs.
- 6.51 Based on discussions with commissioners, it is assumed that this identified additional need could be met by:
1. The provision of an additional foyer service in Banbury (c.11 units); based on commissioner experience/views that there is a supported housing capacity 'gap' for young people in Banbury. With a further 3 required in Oxford, Didcot and Bicester, based on the population of current children in care and move on properties and local amenities for UASC.
 2. The provision of a supported housing service for young people with mental health needs/complex support needs in Oxford (c.9 units).
 3. Additional further supported housing capacity of c.70 units is required county wide (including additional foyer provision in Oxford, Didcot and Bicester), with the majority required in Oxford City and Banbury where young people have voiced they want to live.
- 6.52 Given that the estimated population of care leavers is anticipated to remain relatively constant over the next 5 years (c.460 per annum), it is assumed that meeting this additional need for supported housing over the next 5 years will satisfy demand for supported housing capacity.
- 6.53 However, it is important to note that need for short term supported housing is affected by the level of move-on or 'throughput'. For example, if the average length of stay in young people's supported housing was reduced from 24 months to 18 months, the estimated additional further supported housing capacity required would decrease from c.70 units (as set out above) to c.45 units. Further reductions in the average length of stay in supported housing may reduce this estimated additional need for supported housing still further.

6.54 Commissioners have also identified the need to *remodel* the existing supported housing to better meet the housing needs of care leavers and other vulnerable young people aged 16-25 years for when the YPSA contracts expire in October 2025 (there are up to 2 years options to extend which we may well use for some of the YPSA so this large service commissioned in a staged approach).

6.55 The intention is to create an improved 'housing pathway'. This pathway will in summary provide for:

1. Stage 1: self-contained or shared accommodation. 24/7 support. 6-12 months length of stay providing 14 hours of support to young people.
2. Stage 2: self-contained or shared accommodation. Up to 7 hours support per resident per week. 6-12 months length of stay.
3. Stage 3: self-contained or shared accommodation. Up to 4 hours support per resident per week. 12-24 months length of stay.



6.56 It is assumed that the majority of young people would move through this supported housing pathway prior to moving on to independent housing. However this does not need to be a linear process and this depends on young people's needs and progress made. This is the model used for the 16+ Supported Housing Framework and will be used to model the YPSA services in the future..

7. Summary findings: estimated need for specialist and supported housing in Oxfordshire

- 7.01 Whilst the supported housing need assessment is shown in relation to 'client cohorts', *it is recognised that people's needs are often complex and that innovative approaches to housing and support that go beyond these 'cohort' definitions will be required and indeed desirable:*
- An assumption that mainstream housing suitably designed and/or adapted may be appropriate for many people with care and/or support needs.
 - Opportunities for *inter-generational living* may form part of the required housing solutions.
 - Housing solutions may be *multi-functional*, e.g. providing a mix of mainstream housing, supported housing and potentially other facilities.
 - All housing and supported accommodation for people with care and/or support needs should assist and facilitate *inclusion in community life*.
 - This is consistent with current national policy which places a strong emphasis on the role of preventative approaches, including the role of housing, i.e. approaches to supporting people to remain living in their own homes, in both mainstream housing and supported housing, including the use of home adaptations and digital technology to support and promote the independence of older people and other people with care/support needs.
- 7.02 In relation to the need for different tenure options, for most 'cohorts' this is a need for social/affordable rented supported housing (although it is recognised that supported housing rents are typically higher, sometimes considerably higher, than general needs housing for affordable rent); where a need for other tenure types is identified, e.g. for market sale/shared ownership, this is specifically highlighted.

Estimated need for specialist housing and accommodation: Older people

- 7.03 Evidence from a representative survey of c.5,600 older people aged 50+ across the UK conducted by Ipsos and the Housing LIN in December 2023 indicates that the majority of people aged 65+ intend to either remain in their existing homes (with or without making adaptations) or move to other types of mainstream housing (across all tenures). The evidence from this survey in relation to the preferences of people aged 65+ and 75+ to move to specialist housing for older people and their stated likelihood of doing so has been applied to Oxfordshire and summarised below.
- 7.04 Estimates of need for retirement housing/sheltered housing and extra care housing to 2044 for Oxfordshire are shown in Table 48

Table 48. Estimated need for specialist housing for older people to 2044 in Oxfordshire (units). (EMA estimates).

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2041	Estimated need by 2044
Retirement/sheltered housing (units)	2,821	4,051	5,216	6,046	6,446	7,046
market sale	1,934	2,777	3,054	3,540	3,774	4,126
shared ownership	282	405	522	605	645	705
social/affordable rent	605	869	1,640	1,901	2,027	2,216
Extra care housing (units)	1,117	1,384	1,548	1,910	2,022	2,189
market sale	710	893	902	1,062	1,128	1,226
shared ownership	57	83	100	136	147	164
social/affordable rent	351	408	546	712	747	799

Retirement/sheltered housing:

7.05 For Oxfordshire estimated need to 2044 is c.7,045 homes of which c.2,215 homes are estimated to be required for social/affordable rent and c.4,125 are estimated to be required for open market sale and c.705 for shared ownership.

7.06 In each district¹⁰¹ there is following estimated need for retirement/sheltered housing:

- Cherwell: The estimated need to 2044 is c.1,535 homes of which 460 homes are estimated to be required for social/affordable rent, c.920 are estimated to be required for open market sale and c.155 for shared ownership.
- Oxford City: The estimated need to 2044 is c.1,020 homes of which c.410 homes are estimated to be required for social/affordable rent, c.510 are estimated to be required for open market sale and c.100 for shared ownership.
- South Oxfordshire: The estimated need to 2044 is c.1,640 homes of which c.490 homes are estimated to be required for social/affordable rent, c.985 are estimated to be required for open market sale and c.165 for shared ownership.
- Vale of White Horse: The estimated need to 2044 is c.1,510 homes of which c.450 homes are estimated to be required for social/affordable rent, c.900 are estimated to be required for open market sale and c.150 for shared ownership.
- West Oxfordshire: The estimated need to 2044 is c.1,350 homes of which c.405 homes are estimated to be required for social/affordable rent, c.810 are estimated to be required for open market sale and c.135 for shared ownership.

¹⁰¹ District and County figures may not sum due to rounding.

Extra care housing:

- 7.07 For Oxfordshire estimated need to 2044 is c.2,190 homes of which c.800 homes are estimated to be required for social/affordable rent and c.1,225 homes are estimated to be required for market sale and c.165 for shared ownership
- 7.08 In each district¹⁰² there is the following estimated need for extra care housing:
- Cherwell: The estimated need to 2044 is c.475 homes of which c.165 homes are estimated to be required for social/affordable rent, c.275 are estimated to be required for open market sale and c.35 for shared ownership.
 - Oxford City: The estimated need to 2044 is c.320 homes of which c.145 homes are estimated to be required for social/affordable rent, c.150 are estimated to be required for open market sale and c.25 for shared ownership.
 - South Oxfordshire: The estimated need to 2044 is c.510 homes of which c.180 homes are estimated to be required for social/affordable rent, c.295 are estimated to be required for open market sale and c.35 for shared ownership.
 - Vale of White Horse: The estimated need to 2044 is c.465 homes of which c.165 homes are estimated to be required for social/affordable rent, c.265 are estimated to be required for open market sale and c.35 for shared ownership.
 - West Oxfordshire: The estimated need to 2044 is c.420 homes of which c.150 homes are estimated to be required for social/affordable rent, c.240 are estimated to be required for open market sale and c.30 for shared ownership.
- 7.09 This will meet the housing and care needs of older people who are self-funders as well as older people who need rented housing and are eligible for social care funded by the Council.

Care home beds

- 7.10 From the OCC current Adult Market Position Statement it is clear that there is an expectation that *OCC's and the NHS's requirements for care home beds will be met by existing capacity*, with the likely need to refocus existing care home capacity on people with the most complex care and health needs. This strategic 'direction of travel' has been corroborated through discussions with OCC Officers.
- 7.11 OCC intend to undertake a detailed assessment of the estimated need for care home bed capacity and to publish this evidence separately from this Specialist and Supported Housing Needs Assessment.

¹⁰² District and County figures may not sum due to rounding.

Estimated need for supported accommodation: Adults with learning disability/autistic people

7.12 In summary, it is estimated that:

- an additional c.50 units of supported housing and c.10 shared lives places are needed by 2029;
- an additional c.100 units of supported housing and c.20. shared lives places are needed by 2034 (this includes estimated need to 2029).
- an additional c.150 units of supported housing and c.30. shared lives places are needed by 2039 (this includes estimated need to 2029 and 2034).

7.13 This is shown for estimated supported housing need disaggregated at District level in the table below.

Table 49. Estimated need for supported housing by 2039, by district.

Locality	Est. need for supported housing by 2029 (units)	Est. need for supported housing by 2034 (units)	Est. need for supported housing by 2039 (units)
Cherwell	10	20	30
Oxford City	12	24	36
South Oxfordshire	10	19	29
Vale of White Horse	9	19	29
West Oxfordshire	8	17	26
Oxfordshire (overall)	49	99	150

7.14 Work is in progress by Oxfordshire County Council to review existing supported housing services, including identifying potential re-provision and decommissioning options. Depending on the outcome of this process, it is possible that a proportion of the estimated additional need for supported housing may be met through this process of making best and most effective use of existing supported housing capacity. Other options in a suggested housing pathway to meet estimated need for supported housing and accommodation are set out below.

- Additional 'clusters' of self-contained supported housing of c.8-10 units, that provide medium term supported housing (for example for up to 2-3 years), both for people who don't need or who no longer need 24/7 supported housing but who need a supportive environment before moving to independent housing. Suggested requirement c.10 units in each District by 2029.
- Consideration of development of additional Shared Lives places for people with learning disabilities; c.30 places by 2039.
- This evidence reviewed in relation to future need suggests that there is a requirement to:
 - Review the needs of people currently in care home placements to assess their suitability and need in relation to a potential move to a supported

housing alternative (and the specification of the supported housing alternative/s).

- Review the purpose and suitability of existing shared supported housing to assess their future use as supported housing and the potential for tenants to move on to other housing options (this is currently happening).
- There is a need for people with learning disabilities/autistic people to have better access to mainstream general needs housing and to be supported with floating support to enable people to live within the community. This could include developing community support networks as a model of support as this would enable people to live in mainstream accommodation as well as providing support to access community life.
- The need amongst people aged 65+ with learning disabilities/autistic people for supported accommodation may be met through the development of the proposed housing pathway above. However, some older people with learning disabilities/autistic people will benefit from access to age designated supported accommodation, such as sheltered/retirement housing and extra care housing.

Estimated need for supported housing: Adults with mental health needs

7.15 In summary, it is estimated that:

- An additional c.100 units of supported housing are needed by 2029;
- An additional c.210 units of supported housing are needed by 2034 (this includes estimated need to 2029).
- An additional c.330 units of supported housing are needed by 2039 (this includes estimated need to 2029 and 2034).

7.16 This is shown for estimated supported housing need disaggregated at District level in the table below.

Table 50. Estimated need for additional supported housing to 2039 by district in Oxfordshire.

Locality	Estimated need for additional supported housing by 2029 (units)	Estimated need for additional supported housing by 2034 (units)	Estimated need for additional supported housing by 2039 (units)
Cherwell	21	43	68
Oxford City	30	63	99
South Oxfordshire	18	37	59
Vale of White Horse	16	33	53
West Oxfordshire	16	34	53
Total (Oxfordshire)	100	211	331

- 7.17 The Council and its NHS partners want to develop a housing 'pathway' for people with mental health needs (who are in contact with/supported by specialist mental health services).
- 7.18 The estimated need for supported housing required to 2029 could be met potentially by the following 'components' of the housing pathway:
- Supported housing for people with complex mental health needs. This is typically a small block of flats (c.5-6 units) with 24/7 support, which can provide 'step down' accommodation for people being discharged from inpatient settings (as an alternative to 'bedded care) and/or in relation to avoidance of admission to inpatient beds. Suggested requirement c.6 units.
 - Supported housing for people with complex mental health needs with dual diagnosis needs. This is likely to be typically a small block of flats (c.5-6 units) with 24/7 support. Suggested requirement c.6 units.
 - Supported housing for people with mental health needs with forensic related needs. This is likely to be typically a small group of flats (c.5-6 units) with significant support available (but not necessarily 24/7). Suggested requirement c.6 units.
 - Additional groups of self-contained supported housing of c.8-10 units, that provide medium term supported housing (for example for up to 2-3 years), both for people who don't need or who no longer need 24/7 supported housing but who need a supportive environment before moving to independent housing (e.g. daytime support with night security). Suggested requirement c.10 units in Oxford, South Oxfordshire, Vale and West Oxfordshire. c.20 units in Cherwell.
 - Consideration of development of Shared Lives places for people with mental health needs; c.20 places by 2029.
- 7.19 This evidence reviewed in relation to future need suggests that there is a requirement to:
- Continue to ensure reviews are carried out yearly of the needs of people currently in care home placements to assess their suitability for a move to a supported housing alternative (and the specification of the supported housing alternative/s).
 - Review the purpose and suitability of existing shared supported housing to assess their future use as supported housing both in terms of the buildings and the refocus to the more complex end of need. Identification of the potential for tenants to move on to other housing options to maintain flow.
- 7.20 There is a need for people with serious mental health needs to have better access to mainstream general needs housing, including Extracare housing and to be supported with floating support and domiciliary care to enable people to live within the community. This could include developing community support networks as a model of support as this would enable people to live in mainstream accommodation as well as providing support to access community life. In relation to access to mainstream housing to rent and in relation to developing additional supported housing, the role

of the District and City Councils in Oxfordshire is crucial in enabling access to these housing options.

- 7.21 The need amongst people aged 65+ with mental health needs for supported accommodation may be met through the development of the proposed housing pathway above, for example where an older person may benefit from 'step down' supported housing from inpatient settings. Some older people with mental health needs will benefit from access to age designated supported accommodation, such as sheltered/retirement housing and extra care housing.

Estimated need for accessible housing: Adults with physical disabilities

- 7.22 Table 51 shows the estimates of need for fully wheelchair adapted homes and accessible homes for Oxfordshire to 2034, 2039 and 2044.

Table 51. Need for accessible homes and fully wheelchair adapted homes in Oxfordshire by 2039 and 2044

Type of accessible / adapted home	Estimated need (homes) (2034)	Estimated need (homes) (2039)	Estimated need (homes) (2044)
Accessible homes	16,588	24,881	33,175
Working age adults (18-64)	6,635	9,952	13,270
65+	9,953	14,929	19,905
Fully wheelchair adapted homes	1,130	1,694	2,259
Working age adults (18-64 years)	452	678	904
65+	678	1,016	1,356

- 7.23 In summary, by 2034, it is estimated that the need for accessible housing will be:
- c.16,558 *accessible homes* (i.e. not fully wheelchair adapted dwellings), similar to Part M(4) Category 2, broadly equivalent to the Lifetime Homes standard.
 - This is the equivalent of a need for c.1,655 accessible homes required per year to 2034 for the all-age population.
 - Among the working-age population, this is the equivalent of a need for c.665 accessible and adapted homes required per year to 2034.
 - c.1,130 *fully wheelchair adapted homes*, i.e. similar to Part M(4) Category 3 broadly equivalent to the Wheelchair Housing Design standard.
 - This is the equivalent of a need for c.113 fully wheelchair-adapted homes required per year to 2034, for the all-age population.
 - For the working age population, this is the equivalent of a need for c.45 fully wheelchair-adapted homes required per year to 2034.

- 7.24 In summary, by 2044, it is estimated that the need for accessible housing will be:

- c.33,200 *accessible homes* (i.e. not fully wheelchair adapted dwellings), similar to Part M(4) Category 2, broadly equivalent to the Lifetime Homes standard.
 - This is the equivalent of a need for c.1,660 accessible and adapted homes required per year to 2044 for the all-age population.
 - Among the working-age population, this is the equivalent of a need for c.664 accessible and adapted homes required per year to 2044.
 - c.2,260 *fully wheelchair adapted homes*, i.e. similar to Part M(4) Category 3 broadly equivalent to the Wheelchair Housing Design standard.
 - This is the equivalent of a need for c.113 fully wheelchair-adapted homes required per year to 2044, for the all-age population.
 - For the working age population, this is the equivalent of a need for c.45 fully wheelchair-adapted homes required per year to 2044.
- 7.25 It is anticipated that estimated need for accessible homes would be met through a mix of adaptations to existing homes (both self-funded and funded through Disabled Facilities Grants) and from new build housing, both social and market housing, built to M4(2) and M4(3) standards.

Estimated need for supported housing: Vulnerable young people, particularly care leavers

- 7.26 Based on the current average length of stay (throughput) in supported housing remaining at c.24 months, this suggests that to meet demand for supported housing, there is a need for an additional 90 units of supported housing (to satisfy need that is currently unmet, as evidenced by the average waiting list for supported housing, and the number of voids in existing supported housing services due to the service not being able to accommodate young people with higher support needs).
- 7.27 It is assumed that as part of the overall need for 90 additional units of supported housing, there is a need for a minimum of 25 additional units of supported housing with 24/7 support available to meet the needs of young people with higher/complex support needs.
- 7.28 Based on discussions with commissioners, it is assumed that this identified additional need could be met by:
- The provision of an additional foyer service in Banbury (c.11 units); based on commissioner experience/views that there is a supported housing capacity 'gap' for young people in Banbury. With a further 3 required in Oxford, Didcot and Bicester 8-12 units each.
 - The provision of a supported housing service for young people with mental health needs/complex support needs in Oxford (c.9 units).

- Additional supported housing capacity of c.70 units is required – countywide (including 3 additional foyers in Oxford, Didcot and Bicester) but particularly in Oxford and Banbury.
- 7.29 Given that the estimated population of care leavers is anticipated to remain relatively constant over the next 5 years (c.460 per annum), it is assumed that meeting estimated additional need for 90 units of supported housing over the next 5 years will satisfy demand for supported housing capacity (equivalent to an additional 18 units per annum over the five years to 2029).
- 7.30 However, it is important to note that need for short term supported housing is affected by the level of move-on or 'throughput'. For example, if the average length of stay in young people's supported housing was reduced from 24 months to 18 months, the estimated additional supported housing capacity required would decrease from c.70 units (as set out above) to c.450 units. Further reductions in the average length of stay in supported housing may reduce this estimated additional need for supported housing still further.
- 7.31 Commissioners have also identified the need to *remodel* the existing supported housing to better meet the housing needs of care leavers and other vulnerable young people aged 16-25 years.
- 7.32 The intention is to create an improved 'housing pathway'. This pathway will in summary provide for:
- Stage 1: self-contained or shared accommodation. 24/7 support. 6-12 months length of stay. 14 hours per person per week.
 - Stage 2: self-contained or shared accommodation. Up to 7 hours support per resident per week. 6-12 months length of stay.
 - Stage 3: self-contained or shared accommodation. Up to 4 hours support per resident per week. 12-24 months length of stay.
- 7.33 It is assumed that the majority of young people would move through this supported housing pathway prior to moving on to independent housing.
- 7.34 The estimated need for additional move-on housing for people leaving supported housing suggests a need for an additional c.65 units of mainstream move-on housing per annum being required.

Annexe 1: Extra care housing in Oxfordshire

Current extra care housing schemes, including private market Extra Care Housing

Scheme name	Location	District	Housing Provider	Number of Units	Rental	Shared Ownership	Private Ownership
Orchard Meadows	Banbury	Cherwell	BPHA	40	20	20	0
Stanbridge House	Banbury	Cherwell	Housing 21	70	60	10	0
Park Gardens	Banbury	Cherwell	Bromford Housing	78	16	17	45
Centurion House	Bicester	Cherwell	BPHA	20	10	10	0
Moorside Place	Kidlington	Cherwell	BPHA	54	39	15	0
Foxhall Court	Banbury	Cherwell	'McCarthy & Stone	56	0	0	56
Erdington House	Yarnton	Cherwell	Housing 21	50	35	15	0
Isis Court	Oxford	Oxford City	BPHA	20	20	0	0
Greater Leys	Oxford	Oxford City	Peabody & GreensquareAccord	69	69	0	0
Shotover View	Oxford	Oxford City	BPHA	55	37	18	0
Towse Court	Goring	South Oxfordshire	SOHA	40	31	9	0
Windmill Place	Thame	South Oxfordshire	SOHA	40	30	10	0
Millcroft	Wallingford	South Oxfordshire	Riverside	40	30	10	0
Albert Court	Henley-on-Thames	South Oxfordshire	McCarthy & Stone	53	0	0	53
Williams Place	Didcot	South Oxfordshire	McCarthy & Stone	60	0	0	60
Frances Curtis Court	Wallingford	South Oxfordshire	SOHA	75	37	38	0
Nicholson House	Abingdon	Vale of white Horse	Sovereign HA	60	60	0	0
Mayott House	Abingdon	Vale of white Horse	BPHA	40	36	4	0
Petypher House	Kingston Bagpuize	Vale of white Horse	SOHA	45	16	29	0
Poppy Meadows	Didcot	Vale of white Horse	Housing 21	80	60	20	0
Fernleigh	Witney	West Oxfordshire	GreensquareAccord	80	32	10	38
The Paddocks	Milton-under Wychwood	West Oxfordshire	GreensquareAccord	44	33	11	0
Watson Place	Chipping Norton	West Oxfordshire	McCarthy & Stone	40	0	0	40
Willow Gardens	Chipping Norton	West Oxfordshire	Housing 21	80	60	20	0
Total Units				1,289	731	266	292

Specialist and Supported Housing Needs Assessment

Potential extra care housing schemes 2025-2031

Year	Current site/scheme name	Location	District	No. of units
2025	Fern Meadows	Faringdon	Vale	60
2026	Kingsmere	Bicester	Cherwell	82
2026	Witney West	Witney	West	TBC
2031	Bankside Phase 2	NE of Oxford Road, Banbury	Cherwell	73
2031	Graven Hill	Bicester	Cherwell	55
2031	Wretchwick Green, SE Bicester	SE Bicester	Cherwell	70
2031	Heyford Park	Heyford Hill	Cherwell	60
2031	Willowbrook Park	Didcot	South	35
2031	Valley Park	Harwell/Milton/Didcot	South	70
2031	Grove Airfield	Grove Airfield	Vale	80
TBC	Rushy Bank	Charlbury	West	TBC
TBC	Salt Cross	Eynsham	West	TBC
TBC	Valley Park	Harwell/Milton/Didcot	South	75
TBC	North of Bayswater Brook	Oxford	City/South	60

Annexe 2: Estimates of need for specialist aged designated housing

Estimating need for specialist housing for older people

Modelling of need for specialist housing suited to older people is based on evidence from a recent (December 2023) large scale, nationally representative survey of c.5,600 people aged 50+ in the UK¹⁰³ that the Housing LIN has undertaken with Ipsos.

The survey results have shown that amongst older people who express a likelihood to move in the future, there is a greater preference to move to other mainstream housing rather than to specialist housing such as retirement/sheltered housing and extra care housing.

An initial approach to using the survey data to model need for specialist housing for older people has been developed based on the survey findings in relation to the *expressed housing preferences* of older people and their stated *likelihood of moving* in the future. This modelling has been used to develop estimates of future specialist housing need. It should be noted that this modelling is subject to further refinement and development. Estimates of need at this stage are produced for specialist housing (retirement/sheltered housing and extra care housing) over the next 20 years.

An analysis of the survey results has been produced, which takes into account the following survey responses and variables:

- Older persons' likelihood of moving from their current accommodation within a 12-month period, within 1-2 years, within 3-5 years, and within 5-10 years;
- Older persons' preference to move, disaggregated by accommodation type, specifically extra care housing and retirement/sheltered housing;
- Age of the respondent;
- Tenure status of the respondent;
- The change in the projected population of older people.

More specifically, analysis of the survey evidence has shown that the following preferences for future housing options:

- Retirement/sheltered housing:
 - c.9% would prefer to move to this type of housing option.
 - c.6% expect this to be the most likely type of specialist housing they will move to.

¹⁰³ Housing LIN (2024, to be published in autumn 2024): Housing preferences for older people: A survey of 5,600+ older people across the UK carried out by Ipsos for the Housing LIN.

- Extra care housing:
 - c.4% would prefer to move to this type of housing option.
 - c.2% expect this to be the most likely type of specialist housing they will move to.

Based on this evidence from the survey, specifically the stated housing preferences of older people and the stated likelihood of moving amongst older people, 'Transition Probabilities' (TPs) have been produced to estimate the predicted likelihood of people moving in a 12-month period, based on their age and their current tenure status, to generate a number of moves over the next 12 months, and subsequently the estimated number of moves over the next 5, 10, 15 and 20 years, equating to need for additional specialist housing units.

The TPs have been adapted to produce estimates of moves based on Oxfordshire's demographic trends, tenure make-up and age profile.

There are three sets of estimates shown in this analysis, which are based on the following assumptions and evidence:

- Estimated moves – lower bound estimate (EML): This is based on the application from the Ipsos/Housing LIN survey of what respondents state is their *most realistic* likelihood of moving to specialist age designated housing (sheltered/retirement housing and extra care housing) projected forward for to 2029, 2034, 2039 and 2044. This takes into account the 65+ population growth over the period for sheltered/retirement housing and the 75+ population for extra care housing and the likely transitions/moves to specialist housing to 2029, 2034, 2039 and 2044.
- Estimated moves – upper bound estimate (EMU): This is based on the application from the Ipsos/Housing LIN survey of what respondents state is their *most preferred* likelihood of moving to specialist age designated housing (sheltered/retirement housing and extra care housing) projected forward for to 2029, 2034, 2039 and 2044. This takes into account the 65+ population growth over the period for sheltered/retirement housing and the 75+ population for extra care housing and the likely transitions/moves to specialist housing to 2029, 2034, 2039 and 2044.
- Both EML and EMU initial estimates are adjusted to allow for:
- Estimated turnover within sheltered/retirement housing, i.e. capacity in existing provision that becomes available to meet need due to residents leaving/dying. Estimated annual turnover is assumed to be c.10%, based on the local knowledge and the Housing LIN's experience of specialist housing for older people.
- Oxfordshire County Council's (OCC) policy objective of providing extra care housing as a genuine alternative to the use of residential care for some older people. It has been assumed that c.15% of people aged 65+ whom OCC would otherwise have funded to move to a residential care home, can be 'diverted' to move into extra care housing as an alternative; this would increase the need for affordable/social rented extra care housing by c.111 units at 2024 and each subsequent 5 year interval.

- Estimated moves – average trend (EMA): This produces estimates that take into account both the EML and EMU estimates and show the average of these two estimates. This produces a potentially more realistic set of estimates compared to the EMU and EML figures, and therefore is used as the headline estimate of need for age designated specialist housing to 2029, 2034, 2039 and 2044.

The age cohort from the Ipsos/Housing LIN survey used in relation to stated housing preferences and likelihood of moving is the population aged 65+ for sheltered/retirement housing and 75+ for extra care housing i.e. TPs and population projections are based on these age cohorts, as these cohort are identified from the Ipsos research as more likely to move to specialist housing than the 50-64 years cohort.

The table below summarises how estimates have been calculated, specifically

- The appropriate population base is used (65+ for sheltered/retirement housing; 75+ for extra care housing).
- This is multiplied by the appropriate stated preference and likelihood for older persons to move to specialist housing (retirement/sheltered housing and extra care housing) based on either their *preferred* or *most likely* stated preference and likelihood (expressed as a percentage of the relevant age cohort).
- The current supply is subtracted from the initial estimate.
- An adjustment is made to allow for turnover in existing specialist housing meeting a proportion of estimated need (it is assumed that 10% of estimated need can be met from turnover in existing stock)
- In relation to extra care housing, a further adjustment is made to allow for OCC's policy intent of 'diverting' a proportion of older people from residential care home placements into extra care housing (15% 'diversion' is assumed).

Specialist and Supported Housing Needs Assessment

	2024	2029	2034	2039	2044
65+ population	137946	154350	169885	180947	194284
75+ population	70324	78068	82816	93297	101399
Current supply (units)					
sheltered housing	6841				
extra care housing	1289				
Ipsos over 50 UK research (2023)					
Sheltered housing preferred	9%				
Sheltered housing most likely	6%				
extra care housing preferred	4%				
extra care housing most likely	2%				
Adjustments					
Turnover per annum					
sheltered housing (10%)	(-684)				
extra care housing (10%)	(-129)				
OCC ECH policy (15% 'diversion' rate)		(+111)	(+111)	(+111)	(+111)
Lower bound estimates	2024	2029	2034	2039	2044
Sheltered housing:	752	1736	2668	3332	4132
Extra Care housing:	414	604	720	977	1175
Upper bound estimates	2024	2029	2034	2039	2044
Sheltered housing:	4890	6367	7765	8760	9961
Extra Care housing:	1820	2165	2376	2843	3203
EMA average	2024	2029	2034	2039	2044
Sheltered housing:	2821	4051	5216	6046	7046
Extra Care housing:	1117	1384	1548	1910	2189

The projected estimates of future need for specialist housing for older people are shown below¹⁰⁴. Estimates are shown for retirement/sheltered housing and for extra care housing.

This shows the projected need in terms of number of 'homes', equivalent to 'units' for retirement/sheltered housing and extra care housing.

The estimated need for retirement/sheltered housing and for extra care housing is shown for 2024 and projected by 2029, 2034, 2039 and 2044 10. Estimated additional need is not cumulative.

It has been assumed that, based in part on the current tenure split amongst people aged 65+, the tenure split for future projected housing need to 2034 is:

¹⁰⁴ It would be prudent to check, and potentially amend, estimates of need for specialist housing if future ONS population projections differ from the most recent release, e.g. following a future census.

Specialist and Supported Housing Needs Assessment

- c.70% of the estimated need will be for market sale;
- c.20% of the estimated need will be for social/affordable rent.
- c.10% of the estimated need for shared ownership;

Given the differing tenure breakdown of the current population cohort aged 45-64 years compared with the current 65+ population, it has been assumed that the tenure split for future projected housing need from 2034 onwards is:

- c.60% of the estimated need will be for market sale;
- c.30% of the estimated need will be for social/affordable rent.
- c.10% of the estimated need will be for shared ownership;

However, in practice there are circumstances where shared ownership may have little demand amongst older people; in these circumstances the need for affordable retirement/sheltered housing and extra care housing should be considered to be the total of estimated need for shared ownership and social/affordable rent. This is likely in practice to increase need for social/affordable rent specialist housing.

Below are the average, upper and lower bound estimated moves/estimated need, EMA and EML and EMU respectively.

Estimated need for specialist housing for older people to 2044 in Oxfordshire (units).

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
EML (lower bound):					
Retirement/sheltered housing (units)	752	1,736	2,668	3,332	4,132
Extra care housing (units):	414	604	720	977	1,175
EMU (upper bound)					
Retirement/sheltered housing (units)	4,890	6,367	7,765	8,760	9,961
Extra care housing (units):	1,820	2,165	2,376	2,843	3,203
EMA (average)					
Retirement/sheltered housing (units)	2,821	4,051	5,216	6,046	7,046
Extra care housing (units):	1,117	1,384	1,548	1,910	2,189

N.B. The figures represent estimated number of likely moves into retirement/sheltered housing and extra care housing, which equate to the estimated number of units needed for the purpose of this analysis.

Specialist and Supported Housing Needs Assessment

Estimated need for specialist housing for older people to 2044 in Oxfordshire (units). (EMA estimates).

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2041	Estimated need by 2044
Retirement/sheltered housing (units)	2,821	4,051	5,216	6,046	6,446	7,046
market sale	1,934	2,777	3,054	3,540	3,774	4,126
shared ownership	282	405	522	605	645	705
social/affordable rent	605	869	1,640	1,901	2,027	2,216
Extra care housing (units)	1,117	1,384	1,548	1,910	2,022	2,189
market sale	710	893	902	1,062	1,128	1,226
shared ownership	57	83	100	136	147	164
social/affordable rent	351	408	546	712	747	799