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Our Ref: CB/laj
Your Ref:
Date: 11th July, 2012

Dear Sir/Madam,

McCARTHY & STONE RETIREMENT LIFESTYLES LIMITED'S RESPONSE TO SOUTH LAKELAND'S CONSULTATION ON THE 'LAND ALLOCATIONS DEVELOPMENT PLAN DOCUMENT (DPD) – SUBMISSION EDITION MAY 2012'

Thank you for the opportunity to comment on the consultation for the aforementioned document. As the market leader in the provision of sheltered housing for sale to the elderly, McCarthy and Stone Retirement Lifestyles Ltd considers that with its extensive experience in providing developments of this nature, it is well placed to provide informed comments on your Land Allocations DPD, insofar as it affects or relates to housing for the elderly.

Further to our letter dated 22nd November 2012, my Client welcomes the identification of two sites (Tram Lane, Kirkby Lonsdale and Station Road, Arnsdale), which are *'suitable for housing for people with limited mobility'*. However, we would like to draw attention to the process for selecting elderly persons' accommodation, which differs from other forms of housing, and highlight the location criteria recommended in the Joint Advisory Note of the National House Builders' Federation and the National Housing and Town Planning Council entitled – 'Sheltered Housing for Sale' (2nd Edition - 1988). Whilst this relates to sheltered housing, the same principles apply to Extra Care and Category II accommodation. The five location criteria identified are Topography, Environment (including safety and security), Mobility, Services and Community Facilities. The NHBF/NHTPC Advisory Note acknowledges that the "ideal" site for sheltered housing is difficult to find. The location for McCarthy and Stone Retirement Lifestyles Ltd developments need to be within easy reach of a shopping centre, public transport and other essential services, all of which contribute to the residents maintaining an independent lifestyle.

Our Client looks to develop within a town centre location, typically on previously developed land, therefore helping to prevent new housing on greenfield land. Consequently, McCarthy and Stone sites accord with national, strategic and local planning policies, which all place strong emphasis on the need to recycle previously developed land in order to safeguard greenfield sites and land in other sensitive areas. Furthermore, providing the opportunity for elderly residents to move into more appropriate and smaller homes, frees up existing under-occupied stock. Indeed, all McCarthy and Stone developments aim to achieve a balance between the potentially competing objectives of development and the conservation of the environment; thereby satisfying the goal of "sustainability".

Elderly Housing Need in South Lakeland

The ageing demographic profile of South Lakeland and the subsequent challenges in providing appropriate levels of care and accommodation for the elderly are identified in the Council's Strategic Housing Market Assessment Review (2011) (SHMA) and the South Lakeland Older Persons Housing Strategy Update 2007-2011.

The SHMA identified that in 2010 25,000 residents within South Lakeland District were aged 65 or over, 24% of the population. Population projections from the ONS expect this increase to 40,900, 36.6% of the total population by 2033. The greatest proportional increase in the population are anticipated to be amongst the 'frail elderly', those aged 75 and over, who have the greatest need of specialist accommodation and care. Residents aged 75 and over are anticipated to increase by 10,500 (86.8%) between 2010 and 2033, with those aged 85+ expected to grow by 145.9% to 9,100 individuals over the same time period. *Table E4: Older People's Population Projections* from the SHMA has been replicated below:

Age group	Year			% Change in Population 2010-2033
	2010	2018	2033	
Total	104,200	106,100	111,700	7.2
Aged 65 and Over	25,000	30,800	40,900	63.6
Aged 75 and Over	12,100	14,700	22,600	86.8
Aged 85 and Over	3,700	4,700	9,100	145.9
As % of Population	2010	2018	2033	
Aged 65 and Over	24.0	29.0	36.6	
Aged 75 and Over	11.6	13.9	20.2	
Aged 85 and Over	3.6	4.4	8.1	

A household survey conducted to inform the Older Person's Housing Strategy Update revealed that tenure was an important consideration for the elderly, with residents aged 60 and over being predominantly owner occupiers (88.3%). Of residents aged 75 and over, 85.5% are owner occupiers.

The survey also considered the housing options which older persons considered as relevant now, or which could be considered within the next five years. Whilst the majority of residents expressed a wish to remain in their own homes, 20.9% were considering sheltered accommodation and 19.9% were considering buying an apartment in a development specific to older people

Both the SHMA and the Older Person's Housing Strategy recommend increasing the housing options available for older people. Paragraph 6.30 of the *Conclusion: Policy and Strategic* chapter of the SHMA states:

'The range of housing options available to older people needs to be diversified, for instance through the development of open market housing marketed at older people and the development of Extra Care Accommodation and co-housing' (paragraph 6.30).

Priority 3 of the Older Person's Housing Strategy is to *'Increase choice in accommodation and support options'*. Sheltered housing is cited as playing a role in meeting this priority. The Strategy notes, however, that demand for traditional sheltered housing has declined markedly. One of the principal factors identified in the Strategy for this decline is that the older stock of sheltered

accommodation does not meet the modern aspirations of elderly residents, with traditional forms of sheltered housing, such as bedsits, becoming an increasingly unpopular choice.

The National Planning Policy Framework

It is necessary to consider the National Planning Policy Framework (NPPF) adopted on March 27th 2012. The NPPF states that at the heart of national policy is *'a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan-making and decision-taking'*. The Ministerial foreword acknowledges the challenges the country faces in accommodating the growing elderly population, emphasising *'we must house a rising population, which is living longer and wants to make new choices'*, and *'development that is sustainable should go ahead, without delay – a presumption in favour of sustainable development that is the basis for every plan, and every decision'*.

Within the 'three dimensions of sustainable development' (economic, social and environmental), the NPPF stipulates that *'the planning system should be supporting strong, vibrant and healthy communities, by providing the supply of housing required to meet the needs of present and future generations'* [emphasis added]. The NPPF calls for Local Planning Authorities to seek out opportunities *'to meet the development needs of their area'*. The Framework also emphasises that *'the Planning system should be pursuing sustainable development through widening the choice of high quality homes'*.

The Framework highlights the need to *'deliver a wide choice of high quality homes, widen opportunities for home ownership and create sustainable, inclusive and mixed communities. Local planning authorities should plan for a mix of housing based on current and future demographic trends, market trends and the needs of different groups in the community...such as older people'* [emphasis added].

In regards to this consultation on Land Allocations DPD, it is important to recognise that the NPPF dictates that *'local planning authorities should use their evidence base to ensure that their Local Plan meets the full, objectively assessed needs for market and affordable housing'*. Consequently, reviewing the evidence within this letter, there is a clear market need for specialist housing for the elderly within South Lakeland. The Framework advises that *'Local planning authorities should have a clear understanding of housing needs in their area'*, and that policy should *'identify the scale and mix of housing and the range of tenures that the local population is likely to need over the plan period which meets household and population projections, taking account of migration and demographic change and addresses the need for all types of housing...including housing for the elderly'* [emphasis added]. Furthermore, the Framework stipulates that local policy should cater for *'housing demand and the scale of housing supply necessary to meet this demand'*.

It is therefore considered that much needed housing for the elderly should be encouraged, and that appropriate planning policy should play a part in delivering specialist housing to meet an evident housing need.

McCarthy and Stone would like to highlight the multiple benefits that owner-occupied private sheltered housing for the elderly provides, both to residents and the wider community, and the increasing 'need' for this type of specialist accommodation for the elderly within your Borough. It is therefore suggested that the following policy be introduced to positively support the delivery of specialised accommodation for older people, such as sheltered housing:

"Development proposals for accommodation designed specifically for the elderly will be encouraged provided that they are accessible by public transport or a reasonable walking distance to community facilities such as shops, medical services, places of worship and public open space."

The remainder of the letter below provides an overview of private sheltered schemes and the benefits they can provide to the elderly.

Benefits of Private Sheltered Accommodation for Elderly Individuals

Sheltered housing is a proven housing choice for elderly people who wish to move into accommodation that provides comfort, security and the ability to manage independently to a greater extent. It enables older people to remain living independently within the community and out of institutions, whilst enjoying peace of mind and receiving the support that they need. All McCarthy and Stone developments are specifically designed to provide housing accommodation for elderly people, who have experienced specific life changing circumstances that prompt the move into a specialised, purpose built, living environment. The communal facilities and specific features within the apartments designed to meet the particular needs of these likeminded people, generally result in a much improved quality of life.

The peace of mind and contentment that this form of housing brings to its residents should not be underestimated. The maintenance of an organised, stress-free lifestyle that will benefit the general health and well-being of a like-minded group of people within a contained, communal living environment is of paramount importance to the success of this form of housing, and is a desirable end-result for society at large.

McCarthy and Stone also provide (Assisted Living) Extra Care Housing aimed at enabling independent living for the “frail elderly”, persons typically aged 80 and over. The provision of suitable accommodation for the frail elderly will be of critical importance to South Lakeland, and the UK on the whole, as the Office of National Statistics projects this age group will see the fastest rate of population growth.

The Extra Care concept provides day to day care in the form of assistance and domiciliary care tailored to owners’ individual needs, enabling the frail elderly to buy in care packages to suit their needs as they change. It provides further choice for the frail elderly allowing them to stay in their own home and maintain a better sense of independence, enhancing their personal welfare over time rather than through the fixed costs of a nursing or residential care with its one for all approach. Accordingly, Extra Care accommodation possesses a number of ‘enhanced facilities’ in terms of the communal facilities available and provides a higher level of care when compared to private retirement housing. It is therefore a different form of specialised housing for the elderly than retirement housing and provides the increasingly elderly population with more choice and with an alternative type of accommodation to meet their needs as frailty increases.

Conclusion

The provision of owner-occupied specialised housing for the elderly will widen the housing choices for older persons within South Lakeland. It allows the local elderly to move into accommodation that enables them to remain living independently within the community and out of institutions, and therefore continue to contribute to the community, whilst enjoying peace of mind and receiving the support that they need.

McCarthy and Stone stress the need to consider addressing the current and future housing needs of older people within your Local Authority, and for your Land Allocations DPD to acknowledge the role that owner-occupied sheltered housing schemes play in meeting older person housing needs, and in providing housing choice for the wider community by freeing up valuable, under-occupied family homes in the local area.

Thank you for the opportunity to comment.

Yours faithfully,

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Associate Director

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