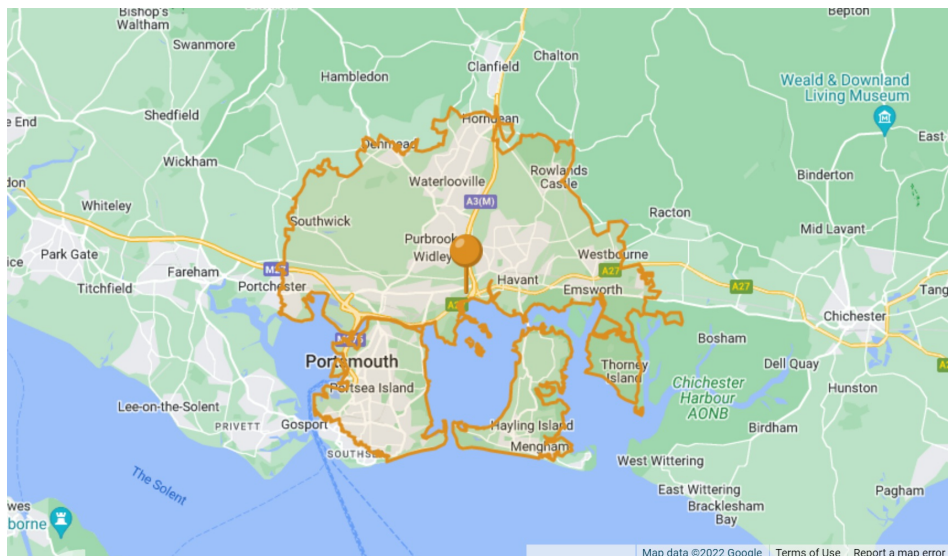


PARAMETERS

Catchment area: 5-mile radius
ASD geography: Regional

Demand base year: 2023
ASD basis of demand: Pre-COVID-19

Catchment area map



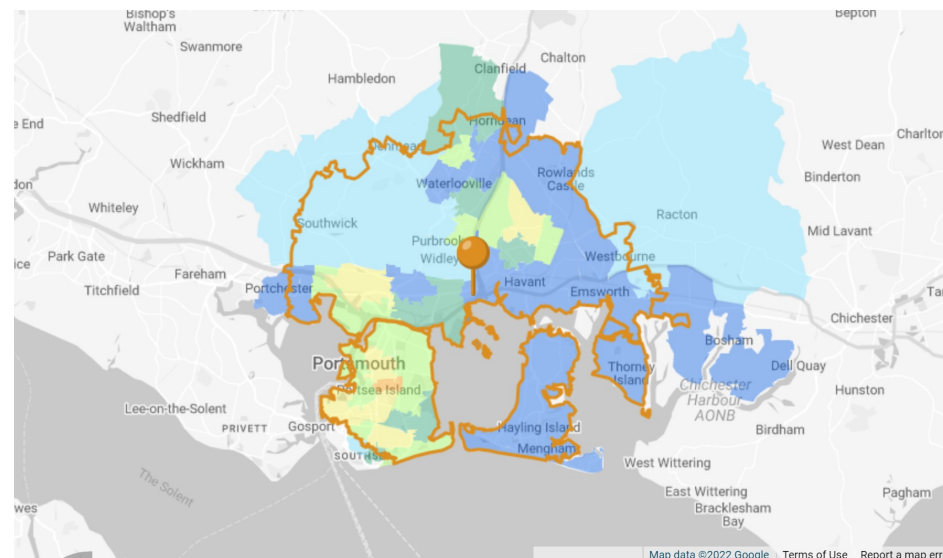
BED REQUIREMENT

Basis of assessment	All elderly beds	En-suite beds	Wetroom beds
Including all planned beds (458)	-88	494	1,410
Including granted planned beds only (410)	-40	542	1,458
Excluding all planned beds	370	952	1,868

DEMAND AND DEMOGRAPHICS

Type	5-mile catchment
Total population	359,898
Demand for care home beds	2,594 (Very large)
Age profile: 85 years plus	2.8% 0.2% higher than the UK average of 2.6%

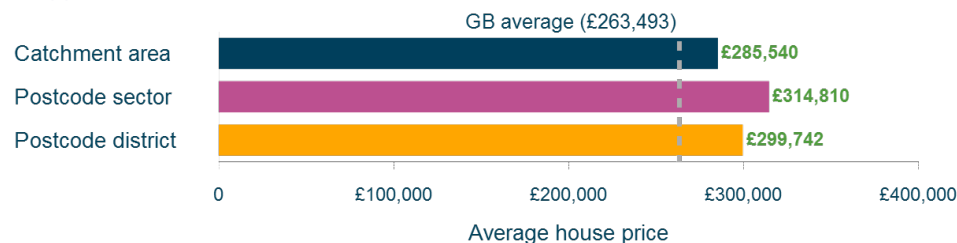
Demand map



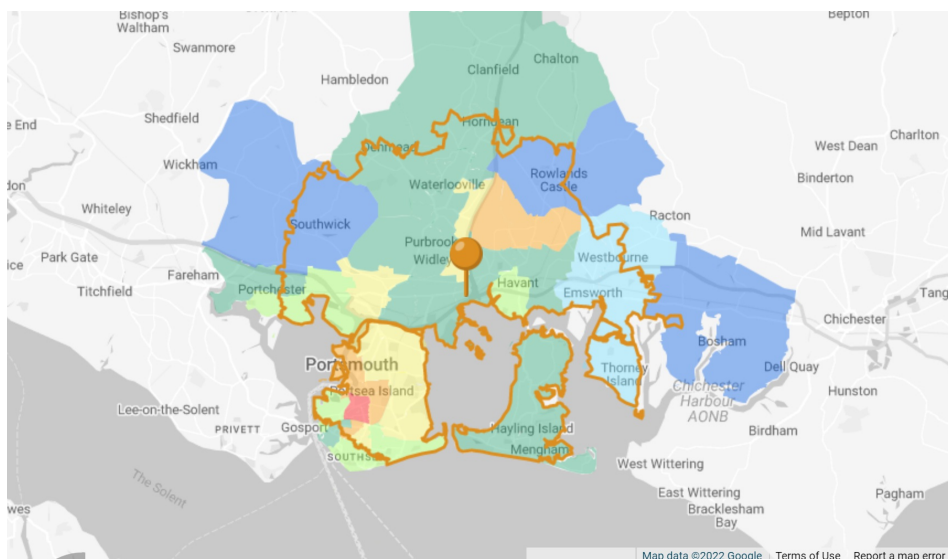
Demand for care home beds per 100,000 total population

≤ 150	151 - 300	301 - 450	451 - 600
601 - 750	751 - 1,000	≥ 1,001	

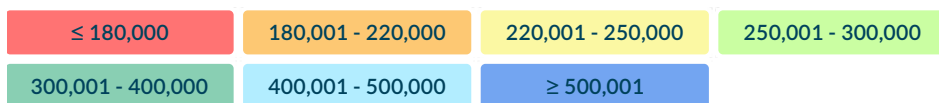
WEALTH



House prices map



Average house price by postcode sector (£)



AVERAGE PRIVATE FEES

First registration date	N/OP (£)	N/DE (£)	PC/OP (£)	PC/DE (£)
2016+	1,302	1,349	1,341	1,300
2015 - 2010	1,700	1,750	950	1,025
2009 - 2000	—	1,788	950	1,142
1999 - 1990	1,263	1,252	995	971
1989 - 1980	1,258	1,292	919	955
pre-1980s / unknown	—	—	900	900
All homes	1,293	1,365	969	1,016

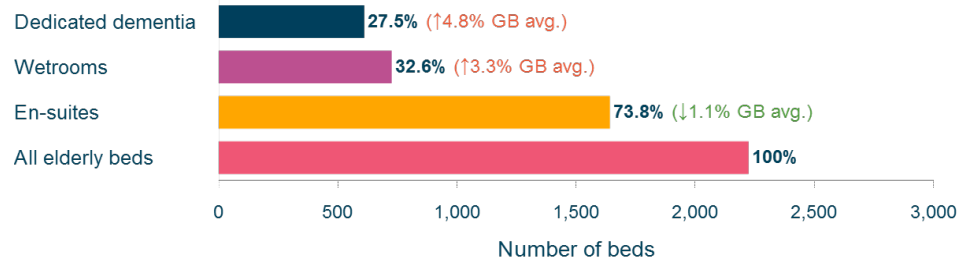
Ownership	N/OP (£)	N/DE (£)	PC/OP (£)	PC/DE (£)
Private (P)	1,312	1,365	974	1,016
Voluntary (V)	1,013	—	750	—
NHS (N)	—	—	—	—
Local Authority (L)	—	—	—	—
All homes	1,293	1,365	969	1,016

CQC rating	N/OP (£)	N/DE (£)	PC/OP (£)	PC/DE (£)
☆ Outstanding	—	—	—	—
● Good	1,277	1,398	968	1,008
● Requires improvement	1,328	1,364	941	974
● Inadequate	—	—	1,000	1,150
● No rating / Not assessed	—	1,134	1,140	1,143
— Not CQC regulated	—	—	—	—
All homes	1,293	1,365	969	1,016

AUTHORITY FEE RATES

Authority	N/OP (£)	N/DE (£)	PC/OP (£)	PC/DE (£)
Portsmouth City Council	931	931	447	678
Other authorities in the catchment				
Havant Borough Council	931	931	447	678
Fareham Borough Council	931	931	447	678
East Hampshire District Council	931	931	447	678
Chichester District Council	784	784	538	626
Winchester City Council	931	931	447	678

SUPPLY QUALITY



PLANNED SUPPLY

Type	Number	Beds
Planned schemes - granted permission	6	410
Planned schemes - pending decision	1	48
Total Planned schemes	7	458

STAFFING

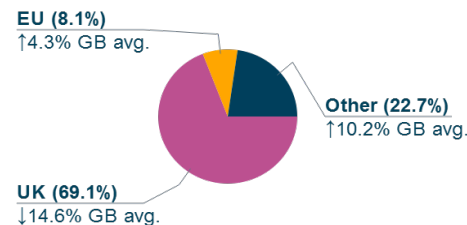
Registered nurses market size:

VERY LARGE

Care assistants market size:

VERY LARGE

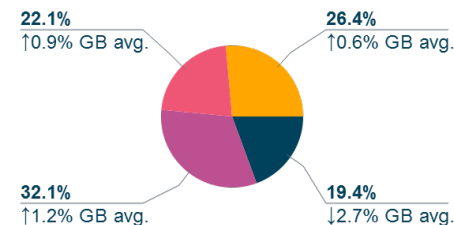
RN Nationality



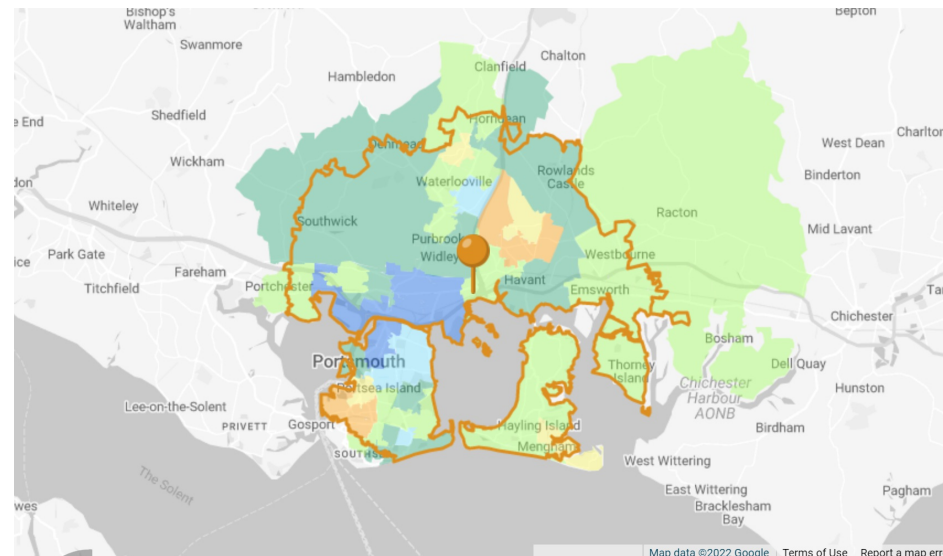
SOCIO-ECONOMIC CLASSIFICATION

Approximated Social Grade (%)

- AB - Higher & intermediate occupations
- C1 - Supervisory, clerical & junior occupations
- C2 - Skilled manual occupations
- DE - Semi- / un-skilled and unemployed



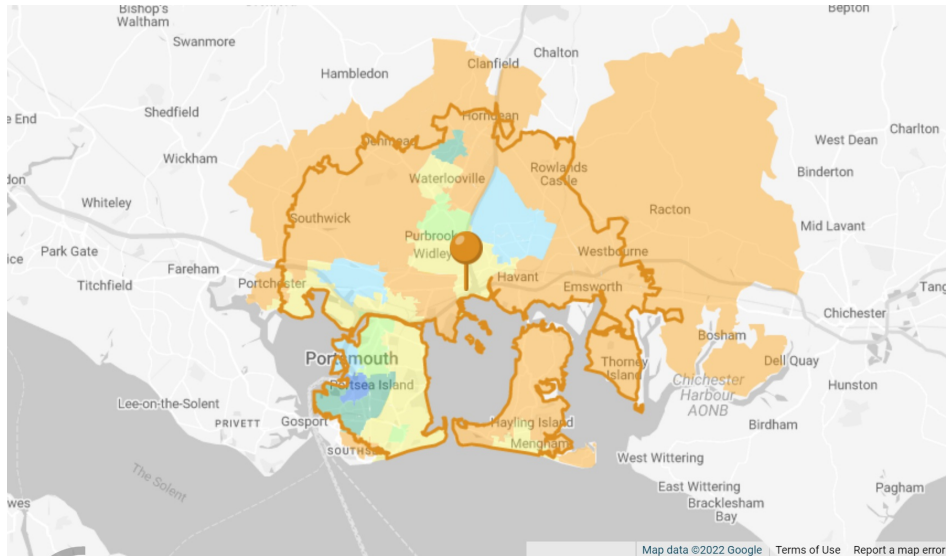
Registered nurses map



Density of registered nurses per 100,000 total population



Care assistants map



Density of care assistants per 100,000 total population



COMPETITION LIST - EXISTING CARE HOMES

Home name	Operator	First reg date	Registration	CQC rating	Distance (miles)	Private fee rates (£ pw)				Types of beds			
						N Min	N Max	PC Min	PC Max	Beds	En-suites	Wetrooms	Dedicated dementia beds
Belmont Castle Care Home	Future Care Group	2004	PC	●	0.4	—	—	850	1,150	40	36	0	0
The Lodge	The Manor Trust Bedhampton Charity	1983	PC	●	0.6	—	—	750	750	14	8	0	0
Alexandra Rose	Riva Ltd	1991	PC	●	0.8	—	—	1,050	1,050	32	29	0	0
Bedhampton Nursing Home & Specialist Care Unit	Healthcare Homes Group Ltd	1987	N	●	1.2	1,475	1,475	—	—	49	46	20	0
The Haven	Owned by an Individual	1987	PC	●	1.3	—	—	750	950	20	19	0	0
Kinross	Kinross Ltd	1987	PC	●	1.3	—	—	800	950	29	19	0	0
Cross Way House	Brookvale Healthcare	2012	PC	●	1.4	—	—	800	1,000	23	23	5	0
Hamilton House Care Centre	The Bondcare Group	2008	N	●	1.5	1,688	1,888	1,400	1,600	60	60	60	60
Latham Lodge Nursing and Residential Care Home	Caring Homes Group	1994	N	●	1.6	1,138	1,238	950	1,050	40	27	0	0
Oaklands	Oaklands Residential Care Ltd	1983	PC	●	1.6	—	—	950	1,000	31	12	0	0
Orchard House	Ms M Tompkin	—	Closed	●	1.7	—	—	—	—	15	1	0	0
East Cosham House	A K M Care	1987	PC	●	1.8	—	—	860	950	24	0	0	0
Southlands Nursing Home	Contemplation Homes Ltd	1987	N	●	1.9	1,277	1,277	1,089	1,089	30	11	0	0
Malmesbury Lawn	Hampshire County Council	1994	PC	●	2.1	—	—	—	—	32	0	0	32
Cosham Court	Crossbind Ltd	1989	N	●	2.1	1,288	1,288	—	—	47	11	0	0
Fawnhope Rest Home - Residential Care and Meals Delivery Service	Aspire Care (UK) Ltd	1987	PC	●	2.2	—	—	800	1,000	19	0	0	0
Park House Rest Home	Shivshakti Nivas Ltd	1985	PC	●	2.2	—	—	725	725	18	13	0	0
South Africa Lodge	Cornerstone Health Care Group Ltd	1999	N	●	2.3	1,034	1,234	—	—	99	99	40	45
Edinburgh House	Portsmouth City Council	1994	Closed	●	2.3	—	—	—	—	32	0	0	32
Purbeck House	Owned by an Individual	1984	PC	●	2.6	—	—	700	750	15	4	0	0
The Wedge	Owned by an Individual	1980	PC	●	2.7	—	—	965	985	21	21	0	0

Home name	Operator	First reg date	Registration	CQC rating	Distance (miles)	Private fee rates (£ pw)				Types of beds			
						N Min	N Max	PC Min	PC Max	Beds	En-suites	Wetrooms	Dedicated dementia beds
Spinnaker Lodge	Spinnaker Lodge Ltd	2015	Closed	●	2.7	—	—	—	—	9	9	0	0
Hilsea Lodge	Portsmouth City Council	1994	Closed	●	2.7	—	—	—	—	35	0	0	35
Springfield Nursing & Residential Care Home	Springfield Health Services Ltd	1996	N	●	2.8	1,250	1,250	1,000	1,000	65	46	2	0
Emsworth House	Hampshire County Council	1994	N	●	3.0	—	—	—	—	72	48	0	72
White Lodge Care Home	Whitelodge Ltd	1987	PC	●	3.0	—	—	750	1,100	25	17	0	0
Oakdene	Mrs Gillian Bryden	1982	PC	●	3.0	—	—	810	850	19	4	0	0
Two Beeches Nursing Home	Contemplation Homes Ltd	1989	N	●	3.0	1,488	1,488	1,300	1,300	25	0	0	0
Meadow House Residential Home	RNJ Care Ltd	1989	PC	●	3.2	—	—	700	1,000	24	20	0	0
Mary Rose Manor	Brookvale Healthcare	2015	N	●	3.2	1,600	1,900	—	—	50	50	50	0
Edenvale Nursing Home	Brookvale Healthcare	2011	Closed	●	3.4	—	—	—	—	35	35	0	29
Nightingale Court Care Home	English Oak Care Homes	2022	PC	●	3.4	—	—	1,000	1,300	35	35	35	35
Wellington Vale Care Home	Cinnamon Care Collection	2016	N	●	3.6	1,088	1,178	—	—	80	80	80	30
Saltmarsh House	Owned by an Individual	1990	PC	●	3.6	—	—	791	861	12	8	0	0
The Oaks Care Home	Caldwell Group Ltd	1987	PC	●	3.6	—	—	650	1,250	33	30	0	0
Shearwater	Portsmouth City Council	2009	PC	●	3.7	—	—	—	—	60	60	0	60
Bluewater Care Homes Ltd	Bluewater Care Homes Ltd	2014	PC	●	3.7	—	—	900	1,300	60	60	60	0
Harry Sotnick House	Portsmouth City Council	2011	N	●	3.8	—	—	—	—	92	92	92	92
Woodlands Care Home	Brookvale Healthcare	1987	PC	●	3.9	—	—	865	895	31	11	0	0
Hartford Court	Hartford Care Group Ltd	2016	PC	●	4.0	—	—	1,200	1,400	60	60	60	30
Fieldgate House	Extraservices Ltd	1987	Closed	●	4.0	1,134	1,384	—	—	39	0	0	0
Oak View Residential Care Home	English Oak Care Homes	1989	PC	●	4.0	—	—	1,000	1,350	42	34	0	42
Easterlea Rest Home	Owned by an Individual	1940	PC	●	4.1	—	—	865	935	19	12	0	0
Gorseway Nursing Home	Agincare Homes Holdings Ltd	1998	N	●	4.1	1,338	1,488	1,050	1,250	88	78	29	26

Home name	Operator	First reg date	Registration	CQC rating	Distance (miles)	Private fee rates (£ pw)				Types of beds			
						N Min	N Max	PC Min	PC Max	Beds	En-suites	Wetrooms	Dedicated dementia beds
Bayith House	Bayith Rest Home Ltd	2018	Closed		4.2	—	—	725	850	3	0	0	0
Bayith Rest Home	Bayith Rest Home Ltd	1989	PC		4.2	—	—	930	1,300	15	1	0	0
Blossom House	Pear Tree Care Ltd	1987	PC		4.3	—	—	850	975	34	12	0	0
Barchester Denmead Grange Care Home	Barchester Healthcare Ltd	2020	PC		4.3	—	—	1,375	1,375	60	60	60	30
St Leonard's Rest Home	Owned by an Individual	1987	PC		4.3	—	—	700	750	15	5	0	0
Alton House Care Home	Alton Care Group	1990	PC		4.3	—	—	700	900	18	7	0	0
Acacia House Nursing Home	Contemplation Homes Ltd	1989	N		4.4	988	1,088	700	800	25	11	0	0
Pear Tree Court	Care UK Nursing & Residential Care Services	2018	N		4.4	1,402	1,593	1,347	1,402	72	72	72	0
Printsted Care Home	Springfield Health Services Ltd	1993	N		4.5	1,250	1,300	—	—	44	40	40	0
Barchester Wimborne Care Home	Barchester Healthcare Ltd	1989	PC		4.5	—	—	1,220	1,220	52	52	0	0
Cheybassa Lodge	Cheybassa Caring Ltd	1983	PC		4.5	—	—	750	900	18	12	0	0
Whitehaven Care Home	Owned by an Individual	1989	PC		4.6	—	—	950	1,100	15	7	0	0
Glebe House	Shaw Healthcare	1994	PC		4.8	—	—	1,010	1,250	40	40	0	0
Willow Lodge	English Oak Care Homes	1985	PC		4.8	—	—	1,030	1,034	40	24	21	40
Seaview Residential Home	Seaview Residential Home Ltd	2003	PC		4.8	—	—	850	1,000	18	15	0	0
Home of Comfort Nursing Home	Home of Comfort	1983	N		4.8	1,013	1,013	—	—	30	3	0	0
Green Meadows	Hampshire County Council	1994	PC		4.8	—	—	—	—	42	0	0	0
Aquarius Nursing Home	Quality Care Management Ltd	1990	N		4.8	1,038	1,343	850	1,155	38	17	0	0
St Ronans Nursing & Residential Care Home	Owned by an Individual	1987	N		4.9	1,294	1,394	1,043	1,263	46	37	0	0
Bluebell Nursing Home	Eleanor Nursing and Social Care Ltd	1984	N		4.9	1,100	1,288	—	—	50	40	0	0
Ferndale Residential Care Home	Seagry Care Ltd	1987	PC		4.9	—	—	1,100	1,200	17	4	0	17
Total catchment area beds:										2,392	1,687	726	707

COMPETITION LIST - PLANNED CARE HOMES

Address	Applicant	Distance (miles)	Application status	Date of validation	Date of decision	Application reference	Net en-suite beds	Total beds
Havant Road, Bedhampton, Havant, Hampshire, PO9 3LW	Barratt Homes Southampton	0.3	Granted	17/05/2018	17/01/2020	APP/18/00450	66	66
Belmont Castle Rest Home, 18 - 20 Portsdown Hill Road, Havant, Hampshire, PO9 3JY	LRH Homes	0.4	Pending	07/01/2019	—	APP/19/00003	48	48
Grainger Development site, Land west of London Road, Waterlooville, PO7 5EW	J Beresford	1.8	Granted	08/11/2010	13/03/2014	APP/10/00828	74	74
Former Oak Park School, Leigh Road, Havant, PO9 2ET	Ashley House Plc	1.9	Granted	19/06/2015	18/12/2015	APP/15/00303	80	80
Helmsley House, Bartons Road, West of Normandy Road, Havant, Hampshire, PO9 5NB	Brackley Investments Ltd	2.5	Granted	22/09/2020	31/03/2021	APP/20/00761	64	64
Forest Lodge, Locksway Road, Milton, Southsea, Hampshire, PO4 8LU	LNT Construction Ltd	3.9	Granted	30/08/2019	23/10/2020	19/01322/FUL	66	66
Land East of Horndean, Rowlands Castle Road, Horndean, Waterlooville, Hampshire, PO8 ODL	Highwood Group	4.6	Granted	26/06/2019	17/02/2021	55562/007	60	60
The list above does not include extensions or reconfigurations of existing homes. We estimate that the platform has 97%+ coverage of new build planning applications. However, the Carterwood Analytics platform is a high-level market analysis tool - please undertake additional due diligence prior to committing any costs.							Total catchment area beds:	458
								458