PLANNING STATEMENT

LONDON ROAD
WATERLOOVILLE

PROPOSED RETIREMENT HOUSING DEVELOPMENT FOR McCARTHY AND STONE RETIREMENT LIFESTYLES LTD

AUGUST 2010

CONTENTS PAGE

	PAGE
SUMMARY	3-4
McCARTHY & STONE	4-5
NATURE AND CONCEPT OF RETIREMENT HOUSING	5
THE PLANNING AND SOCIAL BENEFITS OF RETIREMENT HOUSING FOR THE ELDERLY	6
LOCATIONAL CHARACTERISTICS OF THE SITE	7
NATIONAL PLANNING POLICY GUIDANCE AND RELATED DOCUMENTS	7-13
DEVELOPMENT PLAN POLICY FRAMEWORK	13-18
OTHER PLANNING DOCUMENTS	18-20
NON PLANNING DOCUMENTS	20
THE PROPOSAL AND DESIGN APPROACH	20
RELATIONSHIP TO NEIGHBOURING PROPERTIES	20-22
CAR PARKING AND ACCESS	22-23
AMENITY SPACE	23
CONCLUSION	23-24

LIST OF APPENDICES

1. EXECUTIVE SUMMARY OF A BETTER LIFE AND ANNEX B OF A BETTER LIFE
2. OWNING INDEPENDENCE IN RETIREMENT
3. AN AGEING POPULATION THE ROLE AND BENEFITS OF PRIVATE RETIREMENT HOUSING
4. THE TRANSPORT CHARACTERISTICS OF RETIREMENT HOUSING
5. SAFE AND SECURE

SUMMARY

1. This proposal for retirement accommodation for the elderly would provide the opportunity for a high quality residential development that would positively contribute to meeting a local housing need.

2. The proposed development represents a sustainable development, with wide ranging social and planning benefits, both for potential residents and the community as a whole. In summary, these are:

Sustainability Benefits

- A highly sustainable form of development that optimises the use of valuable urban land.
- The provision of needed retirement accommodation that helps address the demographic imperative of an ageing population and the housing stock that is ill equipped to deal with its needs.
- An accessible location and form of development that will lead to less reliance on the private motorcar.
- A development that serves to underpin local facilities, including the retail function of the shops and services close to the site.
- A land use, which is entirely passive and a "good neighbour".
- A building that provides substantial energy efficiency advantages over most open market schemes.

Balanced View of Policy and Other Material Considerations

- Retirement housing provides significant planning and social benefits.
- Sustainable form of development.
- Brings underdeveloped "brownfield" land into beneficial use.
- Maximises use of scarce residential land.
- Net environmental benefit.
- Meets a recognised national priority housing need.
- Helps underpin local facilities.

3. This proposal represents an ideal opportunity for the redevelopment of this "previously developed" site in accordance with the Government's housing and sustainable development policies. It would provide for much needed housing for the elderly thereby helping to prevent new housing on greenfield land and freeing up existing under-occupied stock. Nationally,

approximately 45% of retirement residents originate from within a 5 miles radius (approximately 72% within a 20 mile).

4. Retirement housing provides the elderly with a better housing choice. It provides residents with safety, security and companionship and removes the heavy burden of property maintenance. Therefore, it reduces the anxieties and worries experienced by many elderly people living in accommodation that does not best suit their needs.

5. The location of this proposal which is within easy reach of shops, public transport and other essential services, would enable residents to maintain an independent lifestyle. Retirement housing generates extremely low levels of traffic and the convenience of the location would further reduce the need for car use. Purchasers of retirement housing accommodation benefit from being in a more central location, which means they no longer need or wish to have the 'burden' of car ownership.

6. National, strategic and local planning policies all place strong emphasis on the need to re-cycle previously developed land, in order to safeguard greenfield sites and land in other sensitive areas. The proposed development successfully achieves a balance between the potentially competing objectives of development whilst respecting townscape setting and residential amenities.

7. This proposal will:

- Accord with national planning guidance in relation to sustainable development;
- Accord with the relevant and material provisions of the development plan; and
- Cause no demonstrable harm to any interests of acknowledged importance.

Furthermore, there are significant planning merits associated with the proposals, which further sustainability goals. Accordingly, the presumption in favour of granting planning permissions should prevail.

McCARTHY & STONE

8. McCarthy & Stone was established in 1963. During the past twenty-five years the Company has specialised in the design, construction and management of retirement accommodation for sale to the elderly and has developed a wealth of experience in this particular sector of the housing market. Extensive research both pre and post occupation has been carried out by the Company, which has led to product and service development. This background has resulted in McCarthy & Stone being widely recognised as the market leader in the provision of retirement housing for sale to the elderly.

9. To date more than 30,000 specialised dwellings for the elderly have been built or are in the course of construction at over 1000 development sites throughout the United Kingdom. McCarthy & Stone has considerable experience of successfully developing a wide variety of sites including town centre locations, infill sites, sites within conservation areas, and extensions to Listed Buildings.

10. McCarthy & Stone developments are managed by Peverel Management Services Limited, who specialise in the estate management of private retirement housing for the elderly. Peverel Management Services is the foremost manager of private sector retirement developments in the United Kingdom and play a key role in the special lifestyle offered to the occupants of retirement housing. Through Peverel, McCarthy & Stone are able to maintain a continued relationship with its elderly residents.

NATURE AND CONCEPT OF RETIREMENT HOUSING

11. Retirement housing is a proven option for those older people who need to move into accommodation, which provides them with greater comfort, security and the ability to manage independently to a greater extent. It enables older people to remain living in the community and out of institutions while enjoying peace of mind and receiving the care and support, which they need. Moreover, retirement housing releases existing under-occupied housing (i.e. family houses that have become too large for small elderly households) and thereby helps make better use of the housing stock in general. As mentioned earlier, the majority of residents of retirement schemes originate from the "local" area and thus the move to retirement accommodation aids in freeing up local under occupied housing stock.

12. All McCarthy & Stone developments are specifically designed to provide specialised housing accommodation for the elderly, with communal facilities and specific features within the apartments designed to meet the particular needs of the elderly. While anyone may purchase an apartment, the apartments are sold on the basis of a 125 year lease requiring the accommodation and subject to each apartment being occupied by persons over 60 years of age or in the case of a couple that one of the occupants is over the age of 60 years and the other is over the age of 55 years.

13. This is a reasonable and caring approach to the limitation on occupancy of retirement housing in that it recognises and allows for those exceptional cases where a spouse, who is in the need of special accommodation, may have a younger partner. Such occurrences are, in fact found to be extremely rare as between 60 and 70% of occupants are aged 78 years or more with about 30% aged 80 years or more. The vast majority of McCarthy & Stone residents (some 85-90%) are widowed or single, with 75% comprising single, female households.

THE PLANNING AND SOCIAL BENEFITS OF RETIREMENT HOUSING FOR THE ELDERLY

14. Retirement housing provides a valuable form of specialised accommodation, which meets a specific housing need. In so doing, it gives rise to significant planning and social benefits which realise other planning objectives that national and regional policy give priority to. It provides purpose-built, specifically designed, small units of accommodation for local elderly people. Safety, security and companionship reduces anxieties and maintains health and general well being. It also provides a form of housing which meets better the on-set and increasing problems of mobility/frailty while maintaining an independent lifestyle.

15. These benefits reduce the demands exerted on health and social services and other care facilities – not only in terms of better health, well-being and peace of mind, but also, of course, insofar as doctors, chiropodists, physiotherapists, community nurses, hairdressers etc. who all visit retirement housing developments and can attend to the needs of several residents in a single visit, thus achieving a better use of public resources.

16. Enclosed at **APPENDIX 1** is the Executive Summary of independent research entitled "**A Better Life**" which provides details of the nature and benefits of the proposed development. A copy of a brochure published by the Centre for Policy on **Ageing entitled "Owning Independence in Retirement**" is also enclosed for information at **APPENDIX 2**. Additionally also enclosed at **APPENDIX 3** is **An Ageing Population the Role and Benefits of Private Retirement Housing.**

17. Insofar as local and wider planning benefits are concerned, retirement housing: -

- addresses an acknowledged and specific housing need;
- addresses an existing housing "mis-match", by realising present under-occupied housing and thus plays an important role in the recycling of stock in general;
- has a knock-on effect in terms of the recycling of the whole housing chain – retirement housing being at the "back-end" of the chain;
- maximises the use of urban brownfield land;
- being centrally and conveniently located, reduces the need to travel by car;
- introduces residential use into central locations and shopping centres, thus contributing towards a desirable mix of land uses, thereby adding to and consolidating the vitality and viability of such central areas.
- provides energy efficient construction and living due to maximisation of southerly aspects, shared wall construction, cross-flow ventilation and shared heating facilities.

LOCATIONAL CHARACTERISTICS OF THE SITE

18. The site, which is presently occupied (vacant) by a builders merchants is well located in relation to Warerlooville town centre and is on a bus route thus allowing access to other local centres such as Havant.. Warerlooville itself has a good range of shops and services.

19. It is the type of site envisaged by PPPS1, PPS3 and PPG13 for higher density housing to be located as close as possible to facilities and reducing reliance on the private car.

20. Attached as part of **APPENDIX 1** to the Executive Summary of " **A Better Life" is Annexe B of the full Report** which sets out the economic benefit that a private retirement housing scheme can bring to a town, and identifies that a scheme of 55 residents generates a weekly spend in local shops equivalent to £610,000 per annum. When compared to a conventional housing development, approximately £2.3 million more in local spending would be spent over the lifetime of the scheme.

NATIONAL PLANNING POLICY GUIDANCE AND RELATED DOCUMENTS

21. **Planning Policy Statement 1 (2005) PPS1 Delivering Sustainable Development (2005).** This sets out the Government's objectives for the planning system placing "sustainability" at the forefront of national planning policy, reflecting as it must, the 2004 Act.

22. Paragraph 1 states that in addition to shaping the places where people live and work, the system helps deliver homes and jobs whilst protecting and enhancing the natural and urban environment. The Government recognises the need to provide an adequate and continuous supply of housing land whilst containing urban sprawl and conserving both the urban and rural environment.

23. The aim behind sustainable development is, in part to encourage and promote social cohesion by creating strong, vibrant and sustainable communities. Sustainable communities are created, in part by enabling there to be a choice of housing to accommodate the needs of people throughout their life.

24. It advises in paragraph 17 that a high level of protection be given to the most valued townscapes (and landscapes), with those with national and international designation being given the highest level of protection. The appeal site does not have any such a designation

25. Paragraphs 21 and 22, comment regarding the prudent use of natural resources. Paragraph 21 states that the broad aim should be to ensure that *"outputs are maximised while resources used are minimised (for example by building houses at higher densities on previously*

developed land, rather than at lower densities on greenfield sites)". Thus by constructing buildings at a higher density, a contribution can thereby be made to the prudent use of natural resources.

26. Paragraph 22 advises that Development Plan Policies can encourage the need to minimise the consumption of new resources and Paragraph 27 sets out the general approach to delivering sustainable development by way of the development plan system. Amongst these are the promotion of well designed and located developments in sustainable locations and the provision of a mix and range of housing to meet the needs of communities.

27. **Paragraph 33-35** identify that good design is not confined to the appearance of buildings but the way in which development ensures usable and adaptable places of which a key element is achieving sustainable development including the way in which an area functions. The additional of a sustainable form of housing close the centre fulfils a number of objectives; the development is sustainable in its own right, will provide high quality specialist accommodation, would assist in maintaining the viability of shops/services in Waterlooville through the patronage of its occupiers; the promotion of a mixed and balanced community by the provision of a specialist form of housing as well as allowing for the release of under occupied housing in the locality.

28. Paragraph 36 explores the issue of design and layout and advises that design and access policies should be based on stated objectives for the future have such an area as well as "*an understanding and evaluation of its present defining characteristics*". Paragraph 36 goes on to state that one of the key objectives should include responding to local context and create or reinforce local distinctiveness.

29. Good design is encouraged and paragraph 37 refers to a number of good practice guides, namely *By Design – Urban Design in the planning system: towards better practice, By Design – better places to live, Safer Places – the Planning System and Crime Prevention and Planning and Access for Disabled People: A good Practice Guide.*

30. Paragraph 38 advises that Local Authorities should not attempt to impose architectural styles or particular tastes or indeed to require conformity to certain development forms or styles. It is within these parameters that the concluding sentence to paragraph 38 states that it is proper to promote or reinforce local distinctiveness where it is supported by policies or supplementary planning guidance on design. The site, as previously mentioned, is not within an area of any special designation.

31. **PPS3 Housing** (November 2006) sets out the Government's objective to ensure that everyone should have the opportunity of a decent home and that there should therefore, be a greater choice of housing available to the community so that the housing needs of the whole community

can be met, including those in need of special needs housing. It seeks from the planning system, to be more responsive to these needs by establishing what housing is needed in a given area (at a regional and local level) and then ensure that "systems" for its delivery are in place. It sets out the national planning framework for delivering the government's housing objectives in England.

32. The Strategic and Housing Objectives are set out in Paragraphs 9 to 11 and I summarise the key objectives as the following:

- To achieve a wide choice of high quality homes
- To widen the opportunity for home ownership
- To increase the supply of housing
- To create a flexible response in the supply of land
- Making efficient and effective use of land

33. Matters of design are covered in Paragraphs 12 to 19 and largely reiterate PPS1 in that good design should contribute positively to making places better for people. In addition that design which is inappropriate in its context, or which fails to take the opportunities available for improving the character and quality of an area and the way it functions should not be accepted. The design approach is detailed in the Design and Access Statement and it considered that the proposed development would clearly achieve the objectives of paragraphs 9-11 of PPS1 and also in the way the area functions i.e. patronage of shops and services.

34. In assessing design matters Paragraph 16 sets out the following criteria (not all inclusive and a balanced appraisal must be undertaken):

- Is it easily accessible and well-connected to public transport and community facilities
- Provide or enable good access to community facilities and open amenity space as well as outdoor private space
- Is it well integrated and compliments neighbouring buildings in terms of scale, density, layout and access
- Facilitate the efficient uses of resources
- Create or enhances a distinctive character or it relates well to the surrounding

35. **Paragraphs** 20-23 advise that a characteristic of a mixed community is related to the variety of housing available, not only in terms of price and tenure but also the different types of households including the elderly. Paragraph 21 and 22 in particular advises that Council's should plan for such a mix having regarded to:

- Current and future demographic trends

- The needs of specific groups including the elderly
- Household size

36. **Paragraph 23** identifies that developers should bring forward proposals for market housing which *"reflect demand and a profile of households requiring market housing"* in order to sustain mixed communities. **Paragraph 25** identifies that one of the government's key objectives is to address any shortfalls in the supply of market housing.

37. Affordable housing is dealt with in **paragraphs 27-30**. Paragraph 28 advises on the setting of targets at the regional level (i.e. via Regional Spatial Strategies).

- With regards to Local Development Frameworks paragraph 29 advises LPAs to set a plan wide target but that such should reflect an assessment of the likely economic viability of land for housing,
- taking account of the risk of delivery,
- drawing on informed assessments of the likely levels of finance available including public subsidy and the level of developer contribution that can be reasonably secured.

38. **Paragraph 29** explains that LDF's should set overall plan wide targets taking into account land viability and in particular the level of developer contributions that can be reasonably secured. To do so Local Planning Authorities will need to undertake an informed assessment of the economic viability and proportions of affordable housing proposed.

39. With regards to developer contributions, where it can be justified, off site provision or a financial contribution of a broadly equivalent value may be acceptable as long as the approach contributes to the creation of a mixed and balanced community.

40. Retirement schemes are exempted from the provision of affordable housing as set out under Local Plan Policy H8 (paragraph 2.13).

41. At the strategic level the planning system is required to identify suitable locations for housing developments and **Paragraph 40** reiterates that Local Planning Authorities should continue make the effective use of land by re-using land that was previously developed. National annual target is that at least 60% of new housing should be provided on such land.

42. Similarly, **Paragraph 45** continues the objectives of using land efficiently for housing. **Paragraph 46** states that Local Planning Authorities should have regard to the spatial vision and strategy for housing development in their specific area, including the level of housing demand and need and the availability of suitable land in the area.

43. **Paragraph 50** advises that existing density should not dictate the form of new development and that more efficient use of land can be achieved through good design.

44. From this analysis, it is clear that the approach being taken by the applicant in the evolution of its proposals for the site, has much to support it in the national policy objectives of PPS3 and the ways in which these can be achieved. Additionally, the very interest and commitment of the applicant shows also that the development is deliverable. Under the heading "*Delivering a flexible supply of land for housing", at* **Paragraph 55,** PPS3 states:

> *Local Planning Authorities should identify sufficient specific* ***deliverable*** *sites to deliver housing in the first five years. To be considered deliverable, sites should, at the point of adoption of the relevant Local Development Document:*
>
> - *Be* ***Available*** *– the site is available now.*
> - *Be* ***Suitable*** *– the site offers a suitable and highly sustainable location for development now and would contribute to the creation of sustainable, mixed communities.*
> - *Be* ***Achievable*** *– there is more than a reasonable prospect that housing will be delivered on the site within five years.*

45. Considering the foregoing commentary, it is clear that subject to planning permission being granted, the site and its proposed development is "available", "suitable" and "achievable". The development proposed, has much to commend it from assessment against PPS3.

46. **PPS12 Spatial Planning** (2008). This document explains the current statutory planning system. Particular attention is drawn to Chapter 6 entitled Supplementary Planning Documents. At paragraph 6.1, it is stated *"...DPDs, SPDs should not be prepared with the aim of avoiding the need for examination of policy which should be examined".*

47. **Paragraph 6.4** adds "*District/Borough/City Councils should not produce planning guidance other than SPDs where the guidance is intended to be used in decision-making or the co-ordination of development. This could be construed as wishing to circumvent the provisions for consultation and sustainability appraisals which SPDs have".*

48. The above comments are pertinent should the Council seek to pursue strategies or informal policies which have not been the subject of due process.

49. **Planning Policy Guidance Note 13** (March 2001) further emphasises the need to promote more sustainable development by again strongly promoting the re-use of previously developed land, particularly for housing; increased housing densities; and reduced reliance on the car – particularly where sites are centrally located and/or well served by public transport.

50. The Circular goes on to advise that Council's should not seek minimum but rather maxima parking provision and that developers should not provide more parking that is deemed necessary. Having said this, the fact is that retirement housing is characterised by low car ownership compared to general market housing. A statement setting out the **Transportation Characteristics of Retirement (Sheltered) Housing** is attached at **APPENDIX 4.**

51. **Circular 5/05 Planning Obligations** As a matter of principle, the Applicant does not object to meeting appropriate contributions where such are in accordance with Circular 05/05 – Planning Obligations.

52. The Circular cannot for obvious reasons cover all eventualities, but its principles are well established.

53. The tests set out in the circular are in my view explicit, restrictive and place the burden upon the decision maker not only to justify each and every request, but to then assess and apply "planning balance" to the matter having regard to whether the absence of a contribution(s) or a failure to meet such a contribution in full is such that planning permission ought not to be granted.

54. Since 6 April 2010, the CIL regulations gives the tests of the Circular legal force in that will give these policy tests legal force in that Regulation 122 provides that *"a planning obligation may only constitute a reason for granting planning permission if the obligation is:*

    a. *necessary to make to the development acceptable in planning terms;*
    b. *directly related to the development; and*
    c. *fairly and reasonably related to the scale and kind to the development."*

55. Even when a contribution could in principle apply, the decision maker must apply planning balance and assess whether its absence or failure to meet requests in full would justify the withholding of planning permission.

56. **Lifetime Homes, Lifetime Neighbourhoods: A National Strategy for Housing in an Ageing Society (February 2008).** This document sets out the government strategy for an ageing society.

57. It recognises that the number of households increasing to growth and that by 2026 over 50% of all householders will be aged over 65 years of age. In order to meet this challenge, the government wants to ensure that there is a right range of choices of specialised housing available to those who need more support. It recognises that housing is central to health and well-being.

58. The summary of chapter 2 identifies and recognises that the vast majority of householders (68%) own their own homes and this is expected to rise to around 75% by 2026. As such, these people are expected to wish to maintain their own independence by owning their own homes.

59. According to the 2001 Census the population within the administrative boundaries of Bromley was estimated to be 116,849 (52% Female/48% Male). The survey data also revealed that 23.55 of the population were aged 60 years or over. There were also 15,828 households were a pensioner was the head of the household, of these, 76% were owner occupiers.

60. The government expects Local Authorities to plan for the housing needs for the whole community. This effect reiterates PPS3, Paragraph 23 which requires that the full range of housing provision be considered.

61. Chapter 11 specifically deals with specialised housing such as retirement accommodation for the elderly. The guidance identifies that there is a continuing need for specialised housing and that such accommodation will continue to offer a certain advantage over private housing, particularly to those who need a physical environment designed for those with impairments, better access to help and care, company and a sense of safety.

62. In the provision of appropriate accommodation for the elderly it is also recognised that the private sector has a major strategic role in this.

DEVELOPMENT PLAN POLICY FRAMEWORK

HAVANT BOROUGH DISTRICT WIDE LOCAL PLAN 2005 (Saved policies)		
Policy UA1 Concentration of Development within Urban Areas		
POLICY	**RESPONSE**	**EVIDENCE**
Development will be concentrated within the urban areas of Havant, Waterlooville, Hemsworth and South Hayling as shown on the proposals map (Author's Summary)	Achieved	The site is within the settlement boundary of Waterlooville and close to the town centre. It is therefore well located to shops and services and it is the type of site which is favoured under UA1 as well as National Guidance.
Policy NC5 Other Features of Nature Conservation Interest		
POLICY	**RESPONSE**	**EVIDENCE**
The policy seeks to safe-guard	Achieved	The site has been the subject of a bat

nature conservation interest outside of statutory protected sites (Author's Summary)		survey and the report accompanies the application – no roost were found.
Policy PC1 Control of Potentially Polluting Uses		
POLICY The policy seeks to control developments which may cause pollution of water, air or soil or pollution through noise, smell, smoke, fumes, gas, steam, dust vibration, light, heat, electromagnetic radiation or other polluting emissions. (Author's Summary)	**RESPONSE** Not Applicable	**EVIDENCE** The proposal is a residential use close to a town centre in a predominantly residential area. The proposal will remove an existing non-conforming use, which by virtue of its traffic movements may have contributed to harm to residential amenities.
Policy D1 High Quality Design		
POLICY Development will be permitted provided it achieves a quality design having due regard to various criteria's including the efficient use of land, safe and convenient access to facilities and public transports, in terms of its siting, massing and scale (Author's Summary)	**RESPONSE** Achieved	**EVIDENCE** The proposal has been designed with regard to national and local planning policies which amongst all seek the optimum use of available previously developed land for residential development. The proposal will in addition meet a special housing need. The proposal is location within a defined settlement and consequently constitutes a windfall opportunity which as advocated by PPS1 and PPS3 should be developed as efficiently as possible consistent with relevant planning objectives. The proposal, which has been the subject of a contextual appraisal, is for a well-designed building which would provide visual interest and legibility to the townscape. The proposal would enhance its location and help to create a new sense of place as advocated by PPS1. The proposal would not give rise to any demonstrable harm be it in townscape

		impact or with respect to residential amenities but would in fact provide much needed accommodation for the elderly in a manner which would enhance the visual quality of the area. The site is well related to shops and services and community facilities. It would provide a safe and secure retirement for the intended elderly residents and thus overall contribute to the mix of housing required within the area. The safety and security of residents is of paramount importance and attached at **APPENDIX 5** is a document entitled "**Safe and Secure**" which details typical safety features which are characteristics of the applicant's developments.
Policy D3 Public Spaces		
POLICY The policy identifies that development will only be permitted where it retains, improves or creates contrasting enclosed spaces appropriate to the proposal, linked with other areas, includes a means of enclosure which is of a high standard and of durability and appearance and retains traditional boundary features (Author's Summary)	**RESPONSE** Achieved	**EVIDENCE** The policy appears to be more directed to major developments than windfall opportunities. Nevertheless, the proposal will address the primary street frontages as well as creating a landscaped area particularly on the front elevation to London Road. This new landscaped area would contribute to the character of the area by providing additional "greening". The proposal is therefore wholly consistent with the broad aims of Policy D3.
Policy L7 New Landscape Works		
POLICY Planning permission for new developments will be granted subject to provision being made for new landscape works to enable development to integrate successfully into the	**RESPONSE** Achieved	**EVIDENCE** The proposal is accompanied by a fully detailed landscape scheme for the site. In particular, attention is drawn to the "green" of the section of the site which fronts London Road. This will be a significant visual enhancement which will improve

local environment (Author's Summary)		the character and appearance of the site and contribute to the character of the area.
Policy H5 Density of Housing Development		
POLICY In order to best manage scarce land resources and meet present and projected needs for small dwellings, housing developments will only be permitted if the proposed density is not less than 30 dwellings per hectare. In certain areas development will only be permitted if a minimum density of 40 dwellings per hectare is achieved. (Author's Summary)	**RESPONSE** Achieved	**EVIDENCE** The proposed development is for retirement housing which comprises of 1 and 2 bedroom units. Due to the nature of the accommodation and the age of residents, the average occupancy is in the early 70's and with an average occupancy rate of approximately 1.1 persons per apartment. Due to the fact that the units are 1 and 2 bedrooms, density per se is optimised. However, this notional high density has been achieved with due regard to its context.
Policy H6 Range of House Types and Sizes		
POLICY The policy seeks to achieve a range of dwelling types and sizes including the provision of accommodation for smaller households.	**RESPONSE** Achieved	**EVIDENCE** Please see the response to policy H5 above. In respect of policy H6, explanatory paragraph 201 identifies that the greatest increase in the population is likely to be in the 75+ age group.
Policy H8 Affordable Housing		
POLICY The policy seeks the provision of 30% affordable housing on all new developments in excess of 15 units. However, as clarified under Paragraph 213, sheltered housing schemes are exempt from the requirements of policy H8.	**RESPONSE** Not Applicable	**EVIDENCE** The proposal emprises entirely of retirement housing and is therefore exempt from policy H8 of the Local Plan, a policy which has in recent times been "saved" and carried forward to current policy.
Policy H9 Supporting Housing Provision		

POLICY	RESPONSE	EVIDENCE
The policy seeks to provide such accommodation within defined urban areas and in localities which are accessible to local shops and services, a reasonably level locality and includes appropriate and adequate amenity space for residents. (Author's Summary)	Achieved	The proposal comprises entirely of retirement accommodation which is appropriately located. The site is adjacent to an existing retirement development which too was deemed to be appropriate given its locality. The applicant's are well experienced in the provision of retirement housing as detailed elsewhere in this Planning Statement.
Policy T6 Public Transport, Cycling and Walking in New Development		
POLICY	**RESPONSE**	**EVIDENCE**
The policy seeks to ensure that developments are served efficiently by public transport, cycling and walking (Author's Summary)	Achieved	The proposal is for retirement housing which is characterised by relatively low car ownership and traffic movements. Further information on the **Transportation Characteristics of Retirement (Sheltered) Housing** is attached at **Appendix 4.** The proposed development also has to be considered in the light of the current lawful use and its impact on transportation. The proposal would result in a significant reduction in vehicular movements.
Policy T7 Criteria for Access to Developments		
POLICY	**RESPONSE**	**EVIDENCE**
The policy seeks to ensure that new developments do not impact adversely on highway safety.	Achieved	Given the current authorised use as a builder's merchant, this could be characterised by relatively high traffic movement. This would contrast quite significantly with the proposal which would significantly reduce any potential for traffic movements to and from London Road. Please see further comments regarding the **Transportation Characteristics of Retirement (Sheltered) Housing** is attached at **Appendix 4.**

Policy T9 Provision of Vehicular Parking and Turning Facilities		
POLICY	**RESPONSE**	**EVIDENCE**
The policy seeks to ensure that appropriate levels of car parking, motorcycles and pedal cycles and turning facilities are provided in accordance with relevant standards.	Achieved	Please see the commentary in relation to policies T6 and T7.
Policy US4 Sewers		
POLICY	**RESPONSE**	**EVIDENCE**
The policy indicates that planning permission for developments which with a material increase of foul and surface water discharges to sewers will be refused unless the LPA is satisfied having regard to the advice of The Environment Agency and Southern Water that there is adequate drainage capacity or that new infrastructure could be provided (Author's Summary)	Achieved	The site has been the subject of a Flood Risk and Drainage Strategy. The submitted document illustrates how the site could be appropriately drained.

OTHER PLANNING DOCUMENTS

63. **Residential Parking and Cycle Provision SPD March 2020.** This document sets out the Council's position regarding car parking standards in the district. It is linked to Policy T9 of the Havant Borough District Wide Local Plan (saved policies).

64. It is recognised under Paragraph 6.4 Older People's Housing that the age restrictions and their lifestyle is such that they have lower travel requirements and therefore lower vehicle ownership. Under Table 6, it is identified that within Waterlooville town centre 0.5-1.0 space per unit would suffice but subject to the age of occupants be restricted by a Condition or legal undertaking and that mobility scooters/buggies storage may be required in addition to long term cycle storage and a short stay provision which, in Table 7, cycle parking is identified as one loop/hoop space per unit.

65. The site itself is just outside the town centre of Waterlooville but as detailed in **Appendix 4 Transportation Characteristics of Retirement (Sheltered) Housing** the transport characteristics of retirement accommodation are well defined including reference to the average age of residents (mid 70s) such that this militates against cycling as a means of transport for most residents.

66. Indeed with respect to Home Water House, which is a retirement scheme immediately adjacent to the site, this development has over 90 units and approximately 29 car parking spaces and 94 apartments including a resident house manager.

67. The survey data attached as part of **Appendix 4** lustrates that cycle ownership is very low, indeed so is buggy ownership. Nonetheless the proposed development does include a buggy store which can double up for resident cycle parking. If visitor cycle spaces are required, this can be dealt by way of a planning condition.

68. It it is considered that the level of parking proposed within the scheme is sufficient to meet the needs of residents.

69. **Havant Borough Pre-submission Core Strategy 2010.** The Pre-Submission Core Strategy was submitted to the Secretary of State on 2nd June 2010. It is unlikely that the examination will commence until later this year and the document will not be adopted until Spring 2011.

70. Bearing these matters in mind, it is considered that presently no material weight can be given to the emerging Core Strategy policies. Notwithstanding the lack of weight which can be attributed to the Core Strategy, there are some matters of fact which do remain pertinent. At Paragraph 1.24 the ageing of the population is noted, in particular that by 2026 just over 25% of the borough's population will be aged 65 years and over with an increase in the population aged 85+ years.

71. In Paragraph 1.27 it is reiterated that owner-occupation is a particular characteristic of development (74% owner occupied).

72. With respect to Waterlooville itself, it is identified that the population, according to the Hampshire County Council small area population forecast of 2008, that it was 49,795. Waterlooville is also to be a major hub of new development with the aim of achieving at least 2,000 new homes in major areas of employment.

73. The needs of the elderly are further recognised under emerging policy **CS7 Community Support and Inclusion**. In particular Paragraph 4.15 reiterates the growth of the over 60 age group. Further commentary is provided in Paragraphs 4.17 which details the needs to achieve

accommodation for older people. This growth and the aim to meet the needs of the elderly are also reiterated in emerging policy CS9 Housing and further commentary at Paragraph 6.27.

74. Therefore, albeit that no particular weight can be attributed to the emerging Core Strategy, it is clear that the borough is experiencing an ageing of the population as indeed is the country as a whole and that the housing needs of older people need to be appropriately met.

NON-PLANNING DOCUMENTS

75. **Building Communities, Meeting Needs, Housing Strategy 2005-2010 (2005).** Although this is a document which appears to be geared towards the public sector, there is recognition within it that the needs of older people need to be met including assistance in helping them to live independently at home. One of the issues covered in Section 1.4 is a need to review sheltered housing schemes as well as the provision of Extra Care accommodation.

76. The needs of the older population are further commented upon in Section 2.7 which deals with Housing Needs. There is a general recognition that by meeting the housing needs of older people that there are benefits in providing purpose built accommodation as this would assist in the release of presently under-occupied housing.

THE PROPOSAL AND DESIGN APPROACH

77. The Access, Design and Sustainability Statement details the design process in the light of constraints and opportunities of the site.

78. The application itself proposes the erection of 39 retirement apartments for the elderly, house manager's accommodation and ancillary facilities. These apartments are largely self-contained although there is a range of communal facilities, which help to create a sense of community within the development. These include a residents' lounge and a guest suite. Supervision and support will be provided by a house manager and a 24 hour Careline Alarm system to provide additional support and security.

RELATIONSHIP TO NEIGHBOURING PROPERTIES

79. The proposed built form addresses the two primary frontages: London Road and Beaconsfield Road. The building is predominantly 3 storeys high but due to the changes in ground level there is a central element which is 4 storeys high. Overall the height of the building is appriate to its context including Broadwater House, Jade Court and Elizabeth Court, the design rationale is set out in the Design, Access and Sustainability Statement.

80. The proposal has given due consideration to the relationship with neighbouring properties.

81. **Relationship to Home Water House, London Road/Hulbert Road:** This adjoining development of retirement apartments is set broadly to the south of the site. As can be seen from the submitted drawings, the existing buildings dominate to present site and have a negative impact upon the setting and outlook of Broadwater House. The proposed building would significantly improve the outlook of this adjoining development by the removal of the present unsightly industrial buildings.

82. At its closest point, the new building would be some 7.5m off the common boundary or in the region of 19.7m when measured to the recessed element of the building i.e. that element as it fronts towards Beaconsfield Road.

83. The proposed retirement block will of course have windows on its rear (south) elevation but the degree of overlooking towards the internal courtyard area of Home Water House will be tempered by the distances mentioned previously. It is considered that the relationships would be appropriate and where there is some degree of mutual overlooking, such is to be expected within an urban location.

84. **Relationship to Elizabeth House, Beaconsfield Road:** As can be seen from the submitted drawings, the existing buildings occupy a substantial part of the site, some of which abut the common boundary with Elizabeth House. In contrast, the proposed building would remove these buildings and the proposed building would be set a minimum of 16.6m from the common boundary. At this point, the proposed building, albeit at 3-stories high, would not have any principle windows viewing in an easterly direction towards Elizabeth House. Thus the privacy of Elizabethh House would not be materially harmed.

85. Albeit that the access point is set some 5.8m from the common boundary, the vehicular movements from the site would be relatively low and further information on the characteristics of traffic generation from retirement schemes is set out in **Appendix 4**. It is therefore considered that the adjoining property would not be harmed in any manner but indeed its setting and residential amenities would certainly be greatly enhanced by the proposed development.

86. **Relationship to Jade Court, Beaconsfield Road:** As discussed pre-application, in recognition of the relationship to Jade Court, the northern elevation of the front range of the building has been remodelled to remove any primary windows viewing directly towards Jade Court. Whilst some secondary windows are retained on this corner elevation, this is because of the need to ensure that the building appropriately addresses Beaconsfield Road at its junction with London Road.

87. The flank wall of the front range of the proposed building fronting Beaconsfield Road would be set approximately approximately 16 metres from the Jade Court (Beaconsfield Road elevation). This is a reasonable distance and although some limited mutual overlooking may occur, such is not unreasonable nor to be unexpected in an urban location.

88. **Relationship to 5 & 4 Beaconsfield Road.** In relation to these two properties, the building is set at a more acute angle and the degree of overlooking which would be experienced by these properties would be to their front gardens which are already open to public view. Their outlook would however be significantly improved by the redevelopment of the site and the removal of the presently unsightly building as well as the reduction in vehicular movements from the lawful use of the site.

89. **Conclusion:** In overall terms, it is considered that the proposed redevelopment of the site would positively enhance the residential amenities of neighbouring properties as well as creating a positive feature in the local townscape which would significantly enhance the character and appearance of the locality.

90. The proposed development would be further enhanced by appropriate planting which would further assist in the development being assimilated in the street scene and thereby further improving the visual qualities of the area.

CAR PARKING & ACCESS

91. McCarthy & Stone have unsurpassed experience in providing on-site car parking within its retirement housing developments. The Company's conclusions on this subject have been consistently persuasive with Local Planning and Highway Authorities and Planning Inspectors where car parking standards and ratios have been under consideration in development plans, planning applications and planning appeals.

92. Retirement housing, because of its very nature and concept, is invariably located within reasonable walking distance of shops and other essential services and close to public transport facilities. In this context, it is relevant, of course, to consider Government Policy in terms of PPG 13.

93. Planning Policy Guidance Note 13 specifically advises local planning authorities to:

(i) "not require developers to provide more spaces than they themselves wish, other than in exceptional circumstances which might include for example, where there are significant implications for road safety which cannot be resolved through the introduction or enforcement of on-street parking controls" (Paragraph 51)

(ii) "set maximum levels of car parking for broad classes of development. Maximum standards should be used as part of a package of measures to promote sustainable transport choices".

94. There is no benefit to McCarthy & Stone in under-supplying on-site car parking provision, as the Company will, quite simply, not be able to sell its apartments or maintain its high regard and reputation as the market leader in this specialised field of housing.

95. It is considered that the level of car parking proposed on this site will accommodate the needs of the proposed development, including visitors given the site's locational characteristics. Additional information is also set out in the accompanying report entitled **The Transportation Characteristics of Retirement Developments** which is attached at **Appendix 4.**

96. The car parking proposed would also fully accord with the aims and objectives of Government Guidance, which promotes sustainable development and seeks to reduce dependence on the private car. In addition a store is provided for motorised buggies.

AMENITY SPACE

97. From McCarthy & Stone's considerable experience the most important amenity space for the residents is not in fact outside the building but is the residents lounge and other communal facilities contained within the building. The Company employs a professionally qualified Landscape Architect and prides itself on the quality of its landscaped treatment, which has become a "hallmark" of all McCarthy & Stone sheltered schemes.

98. Given the experience of McCarthy and Stone in this form of accommodation, it is considered that the requirement for large areas of amenity space would generally be unused and as such would constitute a waste of a valuable resource. Such a waste of resources would of course be totally at odds with Government policy that seeks the efficient and effective use of sustainable located previously developed land.

CONCLUSION

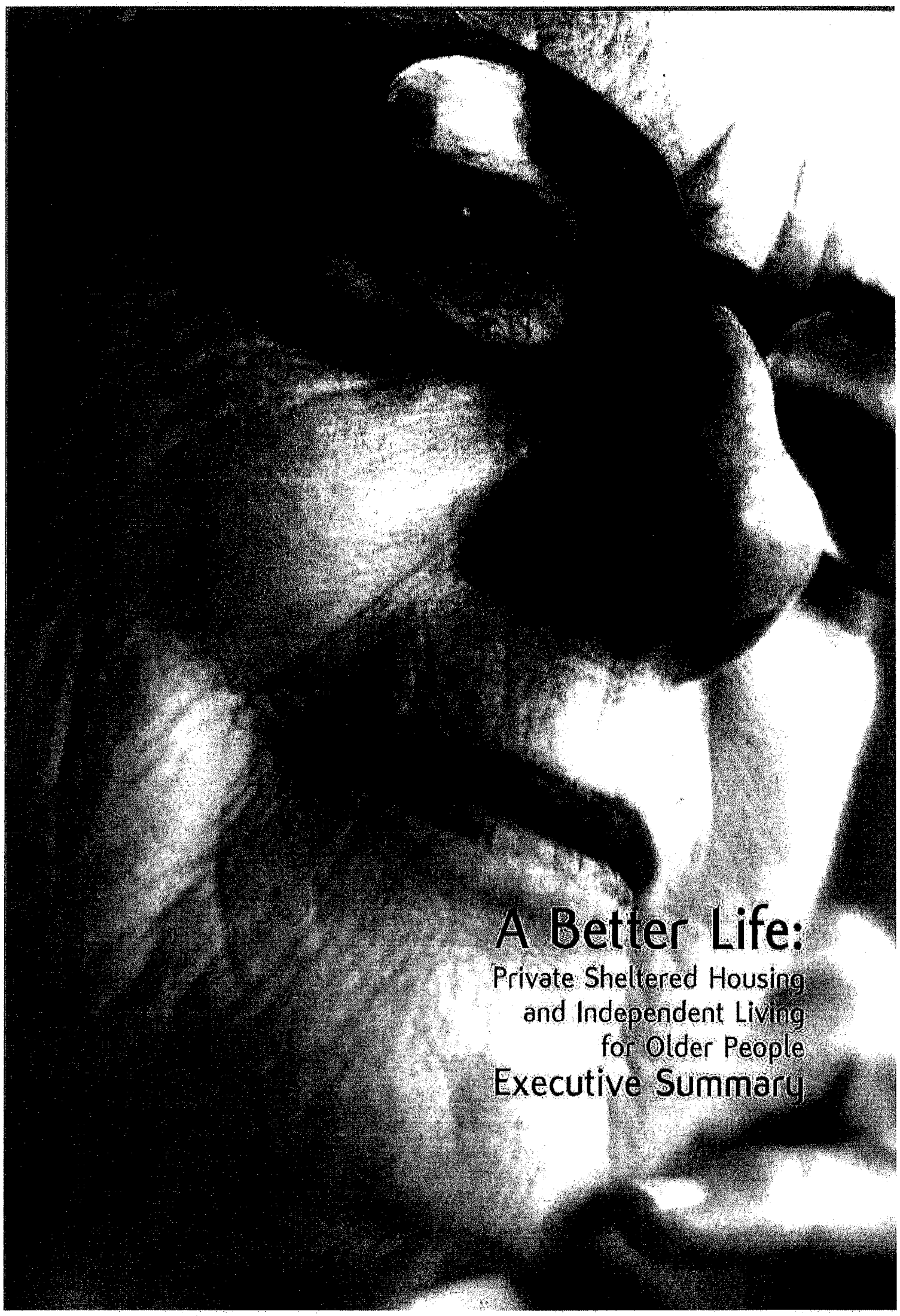
99. The redevelopment of this previously developed site should be optimised, commensurate with environmental considerations and such is, of course, supported by extant and emerging Government and regional guidance.

100. This is best achieved by the beneficial redevelopment of the site. This well designed development would provide for much needed elderly housing within an urban location therefore, helping to prevent new housing on greenfield land. It will also have substantial benefits for local traders by bringing a resident population who are generally not car owners into close proximity of local shops and facilities.

101. Careful consideration has been given to the nature of the site; the proposal represents a positive development. Schemes of this nature are considered "good neighbours" in terms of their very low traffic generation and impact on the area.

102. Accordingly, it is considered that the beneficial redevelopment of this brownfield urban site fully accords with Government policy and guidance and Development Plan policy and as such, the application is commended to the Council for its favourable consideration.

APPENDIX 1



A Better Life:

Private Sheltered Housing and Independent Living for Older People

Executive Summary

Executive Summary

The Reality of Private Sheltered Housing

This report sets out the findings of one of the largest studies into sheltered housing in the United Kingdom. It represents and examines the opinions of over 1,500 current and prospective residents of private sheltered housing – their priorities, levels of independence, health, happiness and contribution to their local community and the wider economy.

It aims to contribute to the wider debate on the needs and wellbeing of older people, ensuring appropriate housing choice and, in particular, the importance of housing in delivering a good quality of life.

Additionally, the report dispels many myths about private sheltered housing that seem to have been allowed to grow in the past.

To summarise the key findings that emerge from this report:

01 THERE IS A SHORTAGE OF PRIVATE SHELTERED HOUSING IN THE UK

- 39% of prospective residents have had to look further afield to find suitable accommodation as there was not enough in their area;
- 81% of prospective residents believe there should be more private sheltered housing in their area;
- If the rate of demand and provision remain at their current levels, there is likely to be a shortage of around 62,500 private sheltered housing units by 2020.

02 PRIVATE SHELTERED HOUSING HELPS OLDER PEOPLE ENGAGE WITH THE LOCAL COMMUNITY

- 39% of current residents live a more active life in private sheltered housing than they did before they moved there;
- 76% of current residents feel that they are a member of the local community;
- 92% of current residents have contact with friends/family on a regular basis.

03 PRIVATE SHELTERED HOUSING PROMOTES INDEPENDENT LIVING

- Since moving into private sheltered housing, 58% of residents have become less dependent on their children;
- 59% of residents have a more independent lifestyle in private sheltered housing than they did in their previous homes;
- 61% of prospective residents strongly believe that moving to private sheltered housing will help them maintain their independence;
- 83% of current residents believe that living in private sheltered housing helps maintain independence.

04 PRIVATE SHELTERED HOUSING IS A HOME FOR LIFE

- 66% of prospective residents strongly believe that moving into private sheltered housing will enable them to avoid the need to move into assisted living accommodation;
- 66% of current residents believe they will live longer in private sheltered housing;
- 86% of current residents believe that their home is a home for life.

05 "STAY PUT AND ADAPT" IS NOT THE BEST SOLUTION FOR MANY OLDER PEOPLE

- 29% of prospective residents spend more time on their own than they would like to;
- 32% of current residents highlight companionship as the greatest advantage of private sheltered housing;
- 66% of current residents enjoy their lifestyle more living in private sheltered housing than they did in their previous home;
- 78% of prospective residents strongly believe moving into private sheltered housing will increase their security;
- 84% of current residents moved into private sheltered housing to have better access to local shops and facilities. 81% did so to have supervision by a house manager. 60% did so in order to rid themselves of unwanted responsibilities.

06 LOCAL ECONOMIES BENEFIT SIGNIFICANTLY FROM PRIVATE SHELTERED HOUSING SCHEMES

- One in three current residents walk to the local shops each day;
- 45% of current residents buy the bulk of their shopping within one mile of their private sheltered housing scheme, with 65% travelling no further than two miles;
- 62% of private sheltered housing residents prefer to shop in local centres rather than major town centres;
- Each week, a typical private sheltered housing scheme generates £11,735 in resident spending (£610,000 per year), generating an additional £1,750 per week (£92,000 per year) in local spending compared to what would have been generated in a conventional high density housing scheme (deadweight). Over the lifetime of a scheme, this equates to around £2.3 million more in local spending than would have been generated by a conventional scheme.

07 PRIVATE SHELTERED HOUSING SCHEMES ALLEVIATE PRESSURES ON THE NHS

- Only 21% of current residents have received inpatient medical care in the last 12 months. Amongst this group, the average number of nights of inpatient care is 7.4, under half the average for the national population aged 75+. This saves the NHS £2,598 per resident recieving inpatient care per year;
- The average number of visits per annum to a GP by current residents is 4.2 compared to 6 visits amongst the national population aged 75+;
- 41% of residents confirm that their health has improved since moving into private sheltered housing;
- 55% of current residents class their health as very good/ good.

08 PRIVATE SHELTERED HOUSING SCHEMES INCREASE THE AVAILABILITY OF ORDINARY LOCAL HOUSING STOCK

- 23% of those moving into private sheltered housing sell their previous homes to families;
- 43% of those moving into private sheltered housing sell to couples;
- 45% of current residents moved within five miles of their previous homes;
- 85% of those who purchase private sheltered housing flats will downsize from houses to do so.

09 PRIVATE SHELTERED HOUSING OFFERS SUFFICIENT SPACE AND HIGH STANDARD SPECIFICATIONS FOR OLDER PEOPLE

- 71% of prospective residents believe that they do not need to live in a house as big as the one they currently live in;
- 71% of current residents moved to private sheltered housing to meet their specific design and mobility needs.

10 PRIVATE SHELTERED HOUSING TRANSFORMS THE QUALITY OF LIFE OF ITS RESIDENTS

- 64% of current residents feel their sense of wellbeing has improved since they moved into private sheltered housing;
- 78% of current residents believe that private sheltered housing helps to alleviate their worries and anxieties;
- 88% of current residents believe that private sheltered housing helps to improve their personal security. 53% of current residents cite personal security as the biggest advantage of private sheltered housing;
- 92% of current residents would recommend private sheltered housing and their way of life to their friends.

Annex B Economic Assessment

A Report for ORB
Residential Economic Impact Assessment
By Roger Tym & Partners

Introduction

ORB employed the services of Roger Tym & Partners, a firm of development economists and planners, to estimate the economic impact of a typical McCarthy & Stone scheme on the local economy. Roger Tym & Partners have an established track record in estimating the economic impacts of commercial and housing schemes. The brief required a short study based on research acquired from an ORB survey of McCarthy & Stone residents, with reliance to a large extent on existing material and on the professional judgments of the consultants to estimate economic benefits.

The principal requirement was to consider economic benefits through:

- The *Local Income Effect* from additional expenditure generated in the local economy; and
- *Public Sector Cost Savings* from economies in the provision of health and social services by bringing people with similar needs (i.e. over 65 age group, into one location and providing suitable living accommodation).

Local Income Effect

The benefits of the typical McCarthy & Stone development scheme will be realised through additional expenditure generated in the local economy. This expenditure by residents will lead to increased income in the local area followed by the multiplier effects of successive rounds of expenditure. We assume that this expenditure will be a net increase spending in the locality because more than half (54 per cent) of the residents will have moved from 6 or more miles away; and in any event those dwellings vacated by McCarthy & Stone residents will typically be filled by larger and younger households whose expenditure is unlikely to be less than that of their predecessors.

Resident Spending in a McCarthy & Stone Scheme

To derive at an estimate of Income Effect, we look at the additional income brought into an area through the spending profile of McCarthy & Stone residents. Average spend of the study group is based on household expenditure figures from ORB's survey of McCarthy & Stone residents, shown in Table 1.

Table 1: Average weekly McCarthy & Stone household expenditure

	(£), 2003 Prices
Sample No.	1,000
No. of Responses	724
	60.37
	12.67
Food and non-alcoholic drinks	
Alcoholic drink	4.72
Tobacco	.23
Clothing and footwear	13.02
Household goods	
Household services	14.05
Personal goods and services	
Motoring	
Fares and other travel costs	7.60
Leisure goods	
Leisure services	
Miscellaneous	14.87
Total household expenditure	250.00
Average weekly expenditure per person	203.40

Table 1 shows that the average McCarthy & Stone resident household will spend £250 per week.

We use the weekly spend figure per person to aggregate the spend generated by a typical McCarthy & Stone scheme. Such a scheme is usually located close to a town or local centre for ease of access by elderly residents. The land area coverage of a typical scheme is 0.4 hectares (1 acre), providing around 45 retirement apartments and housing around 55 residents; together with a house manager's apartment. On the basis of these calculations, the typical McCarthy & Stone scheme generates a weekly spend of £11,250 by the residents. In addition, the manager's household expenditure, assuming a two person household, is £485 per week,[37] bringing the weekly total to £11,735.

[37] Based on ONS Family Expenditure Survey figures for non-retired households with one man and one woman.

Resident Spending from a Conventional Housing Scheme

To assess the additionality of this spend (i.e. the difference from what would have happened in the absence of the McCarthy & Stone scheme), we compare it with the spending generated by a conventional housing scheme on a site of 0.4 hectares. We set out a conventional scheme based on Government guidance to form a benchmark against which the local income benefits of a McCarthy & Stone scheme can be identified.

In its Planning Policy Guidance for Housing (PPG3), 2000, the Government sets out that planning authorities should encourage no fewer than 30 dwellings per hectare for housing developments, and encourage densities of between 30 and 50 dwellings per hectare. Given that most McCarthy & Stone schemes are on the edge of town centres it is likely that higher densities will be required by the planning authorities. For the counterfactual comparison we therefore take the Government's higher average figure of 50 dwellings per hectare (i.e. 20 dwellings on a site of 0.4 hectares). We assume that each dwelling houses one household of 2.4 people based on the average size of a household in England & Wales (Census 2001).

To estimate the average spending generated in a conventional scheme, we use the information from the Family Expenditure Survey (FES) for the financial year April 2000 to March 2001.[38] This estimates an average weekly household expenditure of £390. It ranged from £130 a week in the lowest of the ten income groups to £850 a week in the highest. The average size of household was 2.4 persons, which is consistent with the finding in the 2001 Census.

FES expenditure figures are based on the April 2000 to March 2001 period, while the McCarthy & Stone survey figures are in current prices (i.e. 2003). We therefore factor up the FES results by an annual growth of 2.2 per cent over two years, which is equivalent to the Retail Price Index (RPI) annual rate of change between July 2001 and July 2003. This gives an average household spend in 2003 of £403 (£168 per person).

With a conventional scheme of 20 houses on a typical McCarthy & Stone site, assuming 20 households, this provides a total weekly spend of £8,060, and £420,000 per year. The alternative McCarthy & Stone scheme of 45 apartments, housing around 55 residents and house manager (two person household), is estimated to produce a weekly spend of £11,735 (£610,000 per year).

McCarthy & Stone sites have a myriad of previous uses but we felt it was appropriate to use a conventional housing scheme with the highest level of density for comparison. This is likely to provide the highest local economic benefit of the typical alternative uses on McCarthy & Stone sites. Other typical uses include edge of town centre employment uses such as car showrooms, petrol stations, public houses and sometimes light industry. The benefits to the local economy of these former uses are largely derived through local jobs and these jobs result in some local spend. However, given the low employment density associated with these uses, they are only likely to generate around two to three jobs and very low aggregate spend. Also, the nature of their products (the supply of cars, petrol, etc.) is likely to result in very high to complete leakage of spending on suppliers.

McCarthy & Stone Resident Spending v. Counterfactual Spending

A typical lifetime of a new housing scheme is commonly estimated at 60 years for accounting purposes. To assess the total impact in terms of spending we multiply the spending over the lifetime of a housing scheme in Table 2, and then adjust this to present values. Present value measures the value of a future pound (i.e. the benefits) set by a discount rate. Without discounting, the assessment process is distorted. As we do not know the future value of a pound today we rely on the annual discount rate of 3.5 per cent set by the Government in its Green Book (the Government's set Guidance for Economic Appraisal of development projects).

[38] The FES is a survey of a random sample of private households in the United Kingdom carried out by the Office for National Statistics (ONS). It provides a wealth of information about household expenditure and household income. In 2000-01 6, 637 households took part in the FES. The response rate was 59% in Great Britain and 56% in Northern Ireland.

Table 2: Additionality of Spending over the Lifetime of a MS Scheme (£)

	MS Scheme (A)	Conventional Scheme (B)	Additionality (A-B)
Annual spending of residents	610,300	420,000	190,300
Spending over lifetime of scheme	36,616,600	25,200,000	11,416,600
Present value of spending over lifetime of scheme	15,757,000	10,844,00	4,913,000

As illustrated in Table 2, the total present value of additional spending over the lifetime of a McCarthy & Stone scheme is likely to be around £5 million above the counterfactual, conventional housing scheme.

Quantifying Local Economic Benefits

The local income impact derives from two sources:

- Resident spending – spending by residents to the benefit of the local economy.
- Induced effects – the multiplier effect of successive rounds of expenditure. This depends on assumptions about leakage from the local area, taxation rates and the propensity to consume.

Local benefit is secured through reducing the level of leakage associated with the goods and commodities on which residents spend their money. Leakage is the proportion of spending which benefits those outside of the study area. In other words, we want to know how much of a McCarthy & Stone resident's spending is spent in the local area and not outside.

To estimate the local benefit of a McCarthy & Stone scheme against a conventional scheme we firstly look at the breakdown of the weekly spend by commodity and service types to establish how much might be retained in the local economy. We disaggregate spending by the FES classification, shown in Table 3, and judge the level of local leakage associated with each commodity/ service. We base this on differing levels of leakage[39] in calculating economic impact of expenditure within a typical local authority area. We consider that defining the local economy in terms of the local authority area is appropriate in this case.

[39] English Partnerships, Additionally: A Full Guide (July 2002)

Leakage	Description	Leakage Factor
None	All of the spending goes to local business and people living in the local area	0%
Low	The majority of the spending goes to local businesses and people	25%
Medium	A reasonably high proportion of the spending will be retained within the area	50%
High	Many of the benifits will go to people living outside the area of benefit	75%
Very high	A significant proportion of those benefiting live outside of the area of benefit	90%
Total	All of the benefits go to businesses and people living outside of the area of benefit	100%

Table 3: Local Leakage of Spending by Commodities

Commodities/ Services	Leakage	Leakage Factor
Housing (e.g. mortgage, council tax)	Very High	90%
Fuel and power	Very High	90%
Food and non-alcoholic drinks	Low	25%
Alcoholic drinks	High	75%
Tobacco	High	75%
Clothing & footwear	Medium	50%
Household goods (e.g. toilet paper, furniture)	Medium	50%
Household services (e.g. Contents insurance, personal cleaner, home help)	Low	25%
Personal goods & services (e.g. jewellery, toiletries, medicines, hairdressing)	Low	25%
Motoring (e.g. car purchase, repairs, petrol, tax etc.)	Very High	90%
Fares and other travel costs (e.g. bus, rail, taxi, aeroplane, coach)	Medium	50%
Leisure goods (e.g. books, magazines, toys, newspapers etc.)	Medium	50%
Leisure services (e.g. cinema, shows, bingo, holiday etc.)	Medium	50%
Miscellaneous/ other expenditure	Medium	50%

On the basis of the assumed leakage associated with spending on different commodity/ services in Table 3, we estimate the direct impact in the local economy in Table 4. This shows an estimated 40 per cent of total spending by McCarthy & Stone residents to be injected into a local economy. A conventional scheme results in a marginally higher (41 per cent) proportion.

Table 4 shows no significant difference between the two schemes in terms of proportion of resident spending in the local economy based on assumptions given to spending type. However, McCarthy & Stone residents as a group are less likely to own a car and more likely to spend in the immediate local area.

The McCarthy & Stone residents' survey shows 62 per cent prefer to shop in a local centre compared with 19 per cent in a major town centre and just 10 per cent in an out of town retail park; 84 per cent consider the walking distance to shops and local facilities to be important in choosing their accommodation; and 65 per cent walk to the local shops at least every other day (34 per cent visit daily). These statistics indicate a high propensity to spend in the local centre closest to the scheme. While it is difficult to ascertain what the pattern would be for an average household in a conventional scheme, the likelihood is that more money is spent outside this area owing to higher probabilities of residents working elsewhere and having access to a car.

Table 4: Retained Weekly Resident Spending by Scheme

	Before Leakage		After Leakage	
	McCarthy & Stone Scheme	Conventional Scheme	McCarthy & Stone Scheme	Conventional Scheme
Total Weekly Expenditure (£)	11,600	8,100	4,600	3,300
% of Spend Retained			40%	41%

Table 5: Total Weekly Impact of Resident Spending by Scheme

	Factor	MS Scheme (£)	Conventional Scheme (£)
Total spend		11,700	8,100
Local Spend	40%/41%	4,700	3,300
Local spending multiplier	1.3	1,400	1,000
Total local spend		6,100	4,300

Having obtained a reasonable estimate of direct spending, we are able to look at the additional impact through the expenditure multiplier in the local economy. The multiplier effect measures further economic activity, or in the case of a residential development, further spending associated with additional local income and local supplier purchases. The additional spend is generated by local shops, suppliers, services, etc., further along the supply chain. For example, purchase of a haircut provides income to the barber, some of which he will then go on to spend in the locality.

In Government guidance on assessing regeneration projects,[40] local authority area multipliers are shown to range from 1.21 to 1.38 depending on the type of project intervention (no example is given for a residential scheme). Studies have been undertaken elsewhere which attempt to calculate multiplier levels in local areas, however, there remains a paucity of information on spending multipliers from residential schemes. The closest assessment is visitor spend as this will be spending brought into a local area albeit through a different conduit: that of tourism. Stephen Wanhill's[41] study of different multiplier techniques found that income multipliers for UK cities and towns ranged between 1.19 to 1.40 in seven studies he looked at, with a mean multiplier value of 1.28. Research by RTP[42] on the impact of visitor spending in Brighton & Hove district found an income multiplier of 1.38 in the local economy.

The multiplier will differ for each local authority, so while we are unable to provide a specific multiplier we assume a conservative figure of 1.3, based on the evidence set out above. So for every £1 spent locally there is an additional 30 pence injected into in the local economy from further rounds of spending.

Applying this multiplier to the direct spending derived above, we are able to estimate the total impact on local economies from a McCarthy & Stone scheme compared with a conventional scheme in Table 5.

Local Benefits from McCarthy & Stone Resident Spending v. Counterfactual Spending

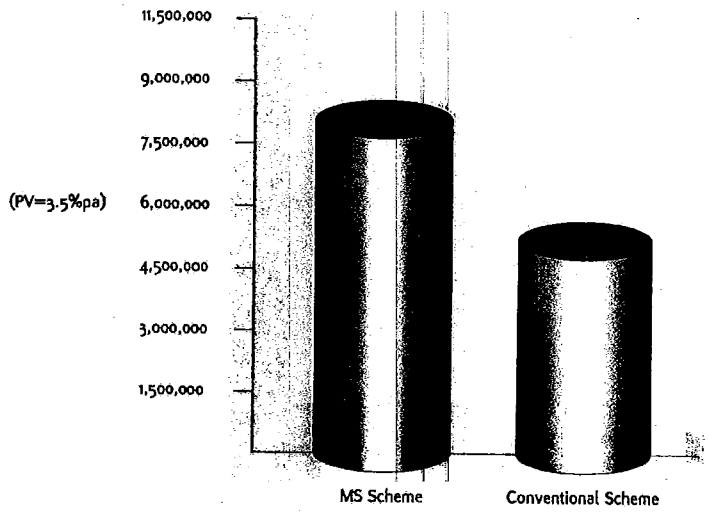
The annual income a McCarthy & Stone scheme will inject into a local economy additional to what might have happened, ie the counterfactual, is estimated to be around £1,750 per week (£92,000 per year). However, it is also appropriate to examine the total impact over the lifetime of a scheme. In Figure 1 we compare the local impact over a 60 year period, the average life of a standard built modern home, which is discounted to present value. This shows a McCarthy & Stone scheme impact to be £8 million, which is £2.3 million above what a conventional scheme is likely to deliver.

[40] The ODPM, Draft 3R (Draft Final, April 2003) and EGRUP (1995) Documents

[41] Stephen Wanhill, The Measurement of Tourist Income Multipliers, Tourism Management, 15(4), pp281-283

[42] Roger Tym & Partners, Economic Impact Assessment of the Brighton Centre (2002)

Figure 1. Lifetime Local Spending Impacts of Schemes (£ Present Value)



Public Sector Cost Savings

Introduction

An additional impact of a McCarthy & Stone scheme is the savings in public sector service delivery costs to the residents. Generally, the need for health and social care services increases with age, as does the burden on public services to meet this need. There will be time and cost savings for doctors, health care assistants, etc., where needs are concentrated in a smaller geographical area. In addition, residents of McCarthy & Stone developments are likely to move into residential care later than residents of non-specialised dwellings. And if admitted to hospital they have a greater chance of earlier release from hospital or temporary care, thereby freeing up space and reducing delays for other patients.

The difficulty is in identifying what the likely savings are from a typical McCarthy & Stone scheme. We therefore refer to research that looks into the economic savings and benefits from developments of schemes like McCarthy & Stone's to illustrate potential economic benefits.

Research into Costs Savings

A Pieda (1997)[43] report found that if homes were adapted so more people would be able to cope with the tasks of daily living in their own home, then more people might not need to move into specialist housing, or would delay such a move. Specialist housing costs may well fall on the spending of local health authorities.

The study sought to quantify this based on annual cost savings that accrue from a delayed move into residential care. Figures used in the report are taken from the Personal Social Services Unit at the University of Kent for 1994/5; however, we have obtained updated figures for 2000/01, which are shown in Table 6.

Table 6: Average Care Costs for Elderly People, 2000/01

Provider	Costs per person per week (£)
Private	303
Voluntary	296
Local Authority	471

Source: PSSRU, Unit Costs of Health and Social Care, 2001

[43] Pieda PLC, A Cost Benefit Analysis of Lifetime Homes (1997)

APPENDIX 2

30 CPA reports

Owning independence in retirement

The role and benefits of private sheltered housing for older people

Gillian Dalley



Summary

Centre for Policy on Ageing

"Owning Independence in Retirement. The role and benefits of private sheltered housing for older people."

Summary

"Owning Independence in Retirement" is a review by the Centre for Policy on Ageing (CPA), commissioned by McCarthy & Stone, which considers the role of sheltered housing in meeting the needs of a vastly changing older population.

Key findings of the report are:

Demographic change, income and home ownership

The change in the age profile and economic circumstances of older people along with a trend towards property ownership indicate rising need and buoyant demand for private sheltered accommodation.

- The older population in Great Britain has grown steadily in the last 20 years and by 2031 the number of people over 85 is likely to have increased by 79 per cent.
- Home ownership amongst the older generation is increasing with two-thirds of older people already home owners. This proportion is likely to increase to three-quarters by 2010.
- Solo living is likely to increase - by 2016 there will be 1 million more single pensioner households.
- Average pensioner incomes grew by over 60 per cent between 1979 and 1997.
- The purchasing power of pensioners in 25 years time will be 50 per cent higher than it is today.

Sheltered housing and changing preferences

The CPA argues in this report that views on sheltered housing have been influenced by the prevalence of out-of-date, 'hard to let' provision largely located in the public sector. Judgements about the quality and success of sheltered accommodation today should take into account improvements and innovation in design which have taken place in recent years and the differences between private and public or social sector provision. Private sector sheltered housing is often considered to be better located, better designed and more in tune with the expectations of older people who have long been used to being owner occupiers. Sheltered housing offers genuine choice to older home buyers.

- Most older people live in their own homes, with one in ten living in sheltered housing.
- Only one in seven of existing sheltered homes is provided by the private sector - in inverse proportion to the tenure structure of older households as a whole. The vast majority of private sheltered accommodation (87 per cent) was built since 1984 in response to a rising demand for this type of accommodation.

- The profile of sheltered housing residents is an ageing one and increasingly comprises single female households.
- Most sheltered housing is located in the public or social sector and concern about problems of over-supply and poor quality have frequently been expressed.
- Research has shown that residents find many benefits from living in private sheltered housing - proximity to people of a similar age; convenient location; specially designed housing; the welcome relinquishing of responsibility for property maintenance; security and general peace of mind; and the availability of a warden and other forms of care.

Policy relating to housing, health and social care for older people

The report puts forward a strong case for policy makers to consider the housing needs of older people across all tenures, as certain characteristics of and needs in old age are common to all, regardless of economic status.

- Housing policy for older people has tended to focus on low income groups despite the changing demographic profile of older people and the needs that many of them have irrespective of income.
- Public policy should consider the general housing needs of older people - the needs of owner-occupiers have, in the past, been neglected even though the inter-relationship between housing, healthcare and social services is crucial for the well being of all older people.
- Historically, policy makers have tended to focus on encouraging older people to stay in their own (long-standing) homes and the recent Government strategy paper on housing for older people, *"Quality and Choice for Older People's Housing"* continues to drive the 'staying put' agenda forward. However, it does support the view that sheltered housing should be included in the range of housing options available to older people.
- The 'staying put' option will not suit the needs of all older households, neither does such policy emphasis assist in making the best use of existing housing stock. Government policy indeed recognises the benefit to the housing sector as a whole of encouraging people to 'downsize' their accommodation as they grow older.
- In order for private sheltered housing to make a positive contribution to the well being of older people, planning authorities need to consider whether their planning policies and development control practices are prejudicing the delivery of this form of needs based housing.

Copies of the report can be purchased (@ £15.00 each plus £1.25 for one copy and £1.75 for two copies postage and packing) from Central Books, 99 Wallis Road, London E9 5LN. Telephone: +44 (0)20 8986 5488; Fax: +44 (0)20 8533 5821, Email: mo@centralbooks.com

Owning independence in retirement

The role and benefits of private sheltered housing for older people

Gillian Dalley

Although housing is not generally regarded as part of community care policy, there is a strong case for seeing it as an important component of the spectrum of services that need to be provided for people as they age. However, there is relatively little research available on the impact of specifically designed, but not 'social', housing for older people and the role of private providers.

This new report provides an overview of current policy and practice relating to private sheltered housing for older people. It considers the characteristics (both now and in the short to mid term) of the ageing population, current patterns and trends in housing provision, changing preferences amongst older people and salient issues in planning policy.

With the growth in numbers of older people, particularly the 'older old', and with changing living patterns, the number of people in supported accommodation of some kind is growing, and likely to continue to grow, over the next twenty years. Private sheltered housing is going to be a significant and increasingly important player.

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APPENDIX 3

An Ageing Population: The Role & Benefits of Private Sheltered Housing



Why should housing for older people be a political priority?

The UK has an ageing population. By 2020, 12.02 million (19.3%) of the UK population will be over 65, a significant rise of 28.4% on today's figures. In turn this is changing the nature of demand for housing, which increasingly needs to be designed and located to meet the special needs of older people.

What are the features of a private sheltered housing development?

Private sheltered housing developments ("Category II" type sheltered housing) are privately owned apartments that normally feature a resident warden, an emergency call/alarm facility and other communal facilities, notably provision of a guest suite, communal lounge and laundry. A typical scheme will contain 45 apartments, housing around 55 residents.

The average age of residents is 79.5 years, with approximately 75% being female. Sheltered households are predominantly one person, with only around 20% couples.

Whilst the majority of specialist retirement housing is provided by local authorities and RSLs, (as at 2003, c.479,000 units – 83% of overall provision), the private sector has delivered approximately 100,000 units in the UK (c.26,000 developed by McCarthy & Stone).

Evidence from a major new survey, "A Better Life: Private Sheltered Housing and Independent Living for Older People", of residents of private sheltered housing shows that older people regard private sheltered housing as a way to take charge of their life in their later years.



"A Better Life: Private Sheltered Housing and Independent Living for Older People" shows how sheltered housing meets the needs and aspirations of older people and the positive effect it has on the wider community, including substantial savings for the NHS.

Why is private sheltered housing special needs housing?

As people get older there is a natural diminution in **health and mobility**. The right housing can enable people to continue to live independent, active lives in spite of this. Private sheltered housing meets specific needs of older owner occupiers within a community, who might otherwise have had to turn to other more costly government funded housing options, such as residential care.

Women are more likely to outlive their partners and often end up alone at home. A majority of people living in private sheltered housing is widowed women. Older people, especially widows, can often become lonely and isolated. **Security and companionship** and the ease of living in a smaller home can make a change in personal circumstances easier to adapt to. 93% of people considering moving to private sheltered housing believed it would offer them more companionship, a benefit of particular importance to women.

Older people need housing that is designed for **better access and mobility**. 70% of private sheltered housing residents say that the design and access facilities on offer influenced their decision to move. As mobility is reduced it makes sense for older people to live close to and within easy reach of the shops and amenities they need. 84% of residents say that living somewhere well located is very important to them.

Older people can often feel more vulnerable, even in their own homes. This is increasingly the case. 81% of residents, twice the number 15 years ago, say that the added **security** of living in sheltered housing is very important.

The **routine maintenance** needed for a house and garden become harder in old age. For example, 69% of residents say that not having to worry about looking after their garden was an influencing factor in deciding to move to private sheltered housing.

Older people require good **health care and advice** but are often the least able to access it. 84% of residents of private sheltered housing say that the emergency Careline provided in each flat was key to their decision to move.

How does private sheltered housing affect older people?

Quality of life is dramatically affected by the design, quality and location of the home we live in. 71% of residents of private sheltered housing believe their life has improved since moving there – an impressive finding, given that the average age of residents is over 79 years.

It enables people to continue to **live locally** when they decide to sell their family home, a priority for 66% of prospective sheltered housing residents.

Private sheltered housing enables older people to keep their **financial independence** by tapping in to un-mortgaged equity and by continuing to own their own home. 64% of residents bought their flat outright and were left with capital for themselves.

71% of residents do not see their offspring as an alternative provider of accommodation and want to maintain their **personal independence**. An easier lifestyle with less worries and responsibilities allows more leisure time too.

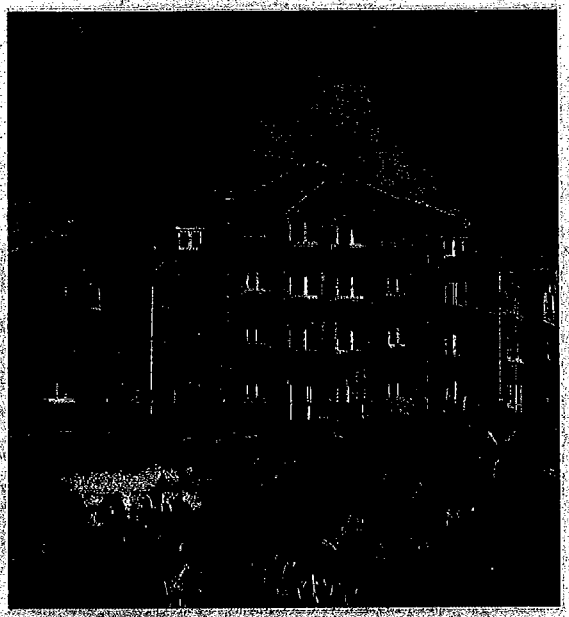
The location and facilities provided by private sheltered housing encourage an **active lifestyle**. So much so that 39% of residents say their lives are more active now than when they lived in their previous home, despite the average age being over 79 years.

Older peoples' **health and well being** often improves with the right housing that meets their specific needs. In the case of private sheltered housing, 55% of residents class their health as good and 41% of residents' health has actually improved since moving there, despite their age.



What impact does private sheltered housing have on its local community?

Private sheltered housing frees up much needed, and often under-occupied, **local housing stock**. 89% of residents



had sold their existing properties to purchase private sheltered housing. 45% of them sold to a young couple or family.

Private sheltered housing schemes have a positive effect on the **local economy**. Not only are they providing better housing for older people, but they contribute to the local economy.

A majority of residents have freed up equity to purchase an apartment. 62% of residents prefer to shop locally and just over a third do so on a daily basis. Each week a typical private sheltered housing scheme will generate a weekly spend of £11,735, generating an additional £1,750 a week in local spending – **equivalent to around £2.3 million more in local spending over the lifetime of a scheme** (i.e. more than would have been generated by a conventional housing scheme).

Because sheltered housing is purpose built for older people, it provides significant **savings for the NHS**. Residents who do need inpatient hospital care tend to stay in hospital for under half the average time for the national population, as private sheltered housing is easier to return to after a stay in hospital because of the design and features it has to offer. This alone saves the NHS £2,598 per resident receiving inpatient care per year. Also, residents are less likely than the general population in that age group to visit their GP or practise nurse, saving the NHS £14.40 a year per resident (rising to £32.40 for those over 75). 75% of residents have not required a GP to visit their home in the last 12 months.

Taking the existing stock of McCarthy & Stone private sheltered housing (c.26,000 units) the saving to the NHS is in the region of £81 million per annum.

Building private sheltered housing offers potential additional savings of £15,000 to £25,000 a year that a resident is delayed from going in to residential care. For 66% of residents the move to private sheltered housing is the last they will make and a huge proportion of residents (86%) think of their apartment as **a 'home for life'**, not a stepping stone to long term care or assisted living.

How much private sheltered housing does a community need?

This is an important question that needs to be addressed as part of an overall strategy for housing and care within a community. Unfortunately less than 10% of local authorities presently have a strategy for housing for older people, none of which adequately take account of the private sector.

Approximately 3000 units of private sheltered housing are being built every year in the UK. It is estimated that if the rate of demand and provision remains constant, there will be a shortage of 62,500 units by 2020. Such shortage is all the more serious when one takes into account the ageing of the population and the likely increase in demand for



sheltered housing. Already 39% of prospective residents say they are having difficulty finding suitable private sheltered housing and 39% had to look further afield for it than they wanted to.

In light of the rapidly ageing population, McCarthy & Stone believes local authorities should assess and plan for all of the housing requirements of older people in their area, including private sheltered housing. McCarthy & Stone looks forward to working with central and local government to achieve this.

McCARTHY & STONE

THE NATURAL CHOICE
FOR A HAPPY RETIREMENT

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APPENDIX 4

TRANSPORTATION CHARACTERISTICS OF RETIREMENT (SHELTERED)) HOUSING

1.0 Characteristics of Typical Retirement (sheltered)) Housing Residents

1.1 In order to properly understand the car ownership and car parking requirements of the residents of this form of housing, it is necessary to have a clear understanding of the transport related characteristics of the residents.

1.2 The Appellant company has unrivalled experience in developing Category II retirement (sheltered) housing for the elderly, having implemented well over 600 developments of this form throughout England, Scotland and Wales. It also retains an on-going interest in the developments.

1.3 The company restricts the age of residents such that they must be 60 years of age, or over, except that where a resident over the age of 60 has a partner of 55 years of age or over, this partner may also occupy an apartment. This is normally controlled by a planning condition or legal agreement, although it is also a standard clause in the resident's lease.

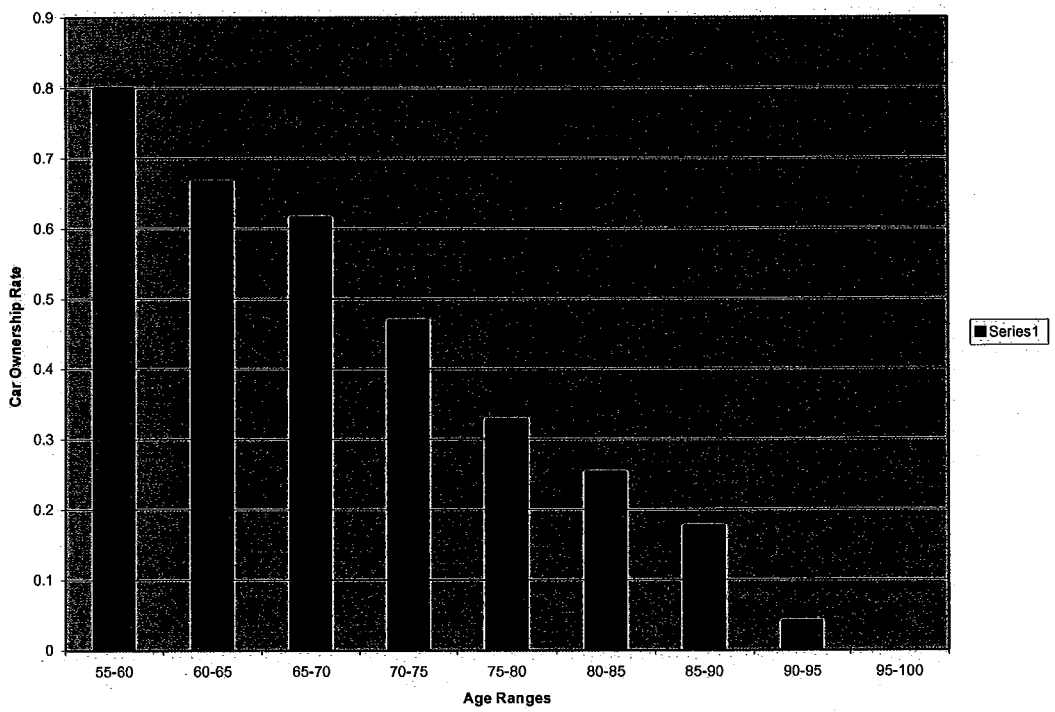
1.4 Based on extensive survey work undertaken in 1996, it was found that the average age of entry to McCarthy and Stone category II retirement (sheltered) developments was 75 years and 6 months, well above the minimum age restriction. It is believed that this reflects the fact that, in the majority of cases, elderly people do not want or need the facilities provided by this form of housing until they are well into their 70s.

1.5 Subsequent, albeit less exhaustive, research indicates that this average age of entry is rising and may now stand at approximately 78 to 79 years of age. This may well reflect that the increase in life expectancy is linked to the elderly remaining more independent for longer and therefore not requiring the facilities provided by this form of housing until later in life.

1.6 Clearly as time passes, the average age of residents in a development will tend to increase further, perhaps stabilising after many years.

1.7 These age characteristics are important, when considering car ownership, as indicated in Figure 1, below. This data was obtained from a recent substantial survey of category II retirement (sheltered) housing. It gives the car ownership levels of various age groups of residents in Category II retirement (sheltered) housing. It shows that, where one of the residents in an apartment is between 55 and 60 years of age, the car ownership rate is likely to be in the order of 80%, but this steadily declines to zero car ownership for residents over the age of 95. The graph shows this significant decline as the ages of residents increase.

Figure 1. **Car Ownership Levels by Age Group of Residents**

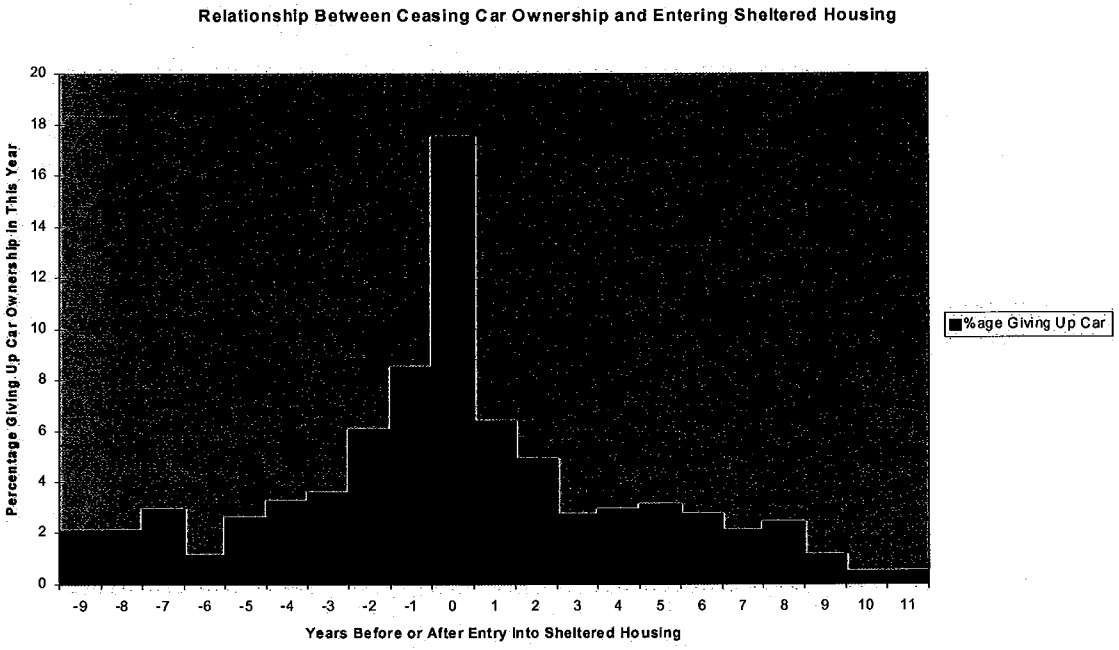


1.8 Given the likely age profile of residents, very few, if any, would be in the youngest age group and the majority will be over the age of 75 and so will have a relatively low car ownership level.

1.9 As indicated above, as the development becomes established, the average age of the residents increases. Figure 1 suggests that this would result in a decline in car ownership, and this is supported by results from other studies. Consequently, car ownership levels, and the associated car parking requirements will tend to be highest in the early few years of the development, once all the apartments are sold. Car ownership and car parking demand will tend to fall over succeeding years.

1.10 It has also been found in category II retirement (sheltered) housing that, of those residents who have given up car ownership, as the majority eventually will, some 18% did so in the same year that they entered retirement (sheltered) housing. The rate of giving up car ownership was also above average in the years immediately before and after entering this form of housing. This is illustrated in Figure 2, below. This indicates that the decision to move into this form of housing may well represent a lifestyle change, which, for many, includes the decision to give up the car.

Figure 2.



Note- 16.7% of gave up car ownership 10 or more years before entry and 3.7% did so 12 or more years after.

1.11 A further factor influencing car ownership is the gender of the residents. Typically, 75% of residents are female. There is a tendency for women to have a lower car ownership than men and to give up car ownership at an earlier age. Indeed a report on the findings of the latest National Travel Survey indicates that *" three quarters of women aged 80 and over live in households without a car."* This applies to women in the community as a whole and those that have moved into retirement (sheltered) housing are likely to have an even lower car ownership level.

1.12 Surveys have also shown the reasons why residents choose to enter Category II retirement (sheltered) housing. The most frequently referred to reason was "security", with 53% of residents giving this reason. Other important reasons were "previous house/garden unsuitable" 43%, "nearer to family" 35%, "death of spouse" 27%, "health reasons" 25% and "companionship" 24%.

1.13 These reasons tend to show the nature of the lifestyle change being sought and the need for security is very important in the design of the development.

1.14 From this description of retirement (sheltered) housing and the characteristics of the residents, it is possible to better understand the nature of this form of development.

2.0 Traffic Generation and Disturbance

2.1 In order to assess the possible level of disturbance, it is necessary to understand that likely traffic generation of the proposed development and the times when these vehicle movements would be likely to occur.

2.2 The information provided below has been obtained from surveys at 18 Category II Retirement (sheltered) Housing developments, throughout England, Wales and Scotland. Half of these developments were chosen for study, based on their varied locations, development ages and range of one and two bedroom apartments.

2.3 It was found that the average trip generation rate has been found to be 1.13 vehicle movements per 12 hour day (0700-1900). This includes all trips made by the residents, along with their visitors and any vehicles servicing the development. It excludes the house managers' trips, but these were found to average less than 2 vehicle movements per day.

2.4 Applying this to a 30 unit scheme (excluding house manager), this would give a 12 hour traffic generation of some 35.4 vehicle movements. This would suggest some 17/18 vehicles entering the site and 17/18 leaving.

2.5 Unsocial hours would normally be considered to be late at night or in the early hours of the morning. As might be expected, the elderly do not tend to travel at such times. The data on movements outside the 12 hour period given above is limited, but based on the information that is available from one development only, the following pattern of movements might be expected.

Table 1 – Likely Distribution of Trips Throughout other 12 Hours (1900-0700)

Time	% of Arrivals	% of Departures	Combined %
1900-2000	3.85	4.00	3.92
2000-2100	3.85	4.00	3.92
2100-2200	0	4.00	1.96
2200-0700	0	0	0
Totals	7.7	12.00	9.8

2.6 This suggests that very few movements will take place in the evening and few, if any, are likely during the night time hours. In this respect, any impact may be less than for a standard family household, where parents or teenage children may well be out until well after 10 p.m.

2.7 During a survey undertaken in 2000/2001, house managers were asked if there had been any complaints from neighbours during the previous 12 months and if so, to specify the basis for these. Responses from some 150 developments revealed that there had been no complaints over noise or disturbance caused by vehicles entering or leaving the site.

2.8 While each development has to be treated on its merits and that not all of the developments surveyed would have had accesses adjacent to adjoining residential properties. However, this arrangement is relatively common. These developments are often located in established residential areas and, because of the desirability of not creating a gap in the ground floor corridor, the accesses are normally provided at one end of the site frontage, wherever this is possible. Such accesses and associated parking is, therefore, often located adjacent to residential properties.

SUMMARISED FROM THESIS OF A J BURNS BSc, MSc, Ceng, MICE, MIHTT

THE TRANSPORT AND RELATED CHARACTERISTICS OF THE RESIDENTS OF PRIVATE CATEGORY II RETIREMENT (SHELTERED) HOUSING FOR THE ELDERLY

UNIVERSITY OF SOUTHAMPTON: FACULTY OF ENGINEERING, SCIENCE AND MATHEMATICS; SCHOOL OF CIVIL ENGINEERING AND THE ENVIRONMENT
JUNE 2004

PARKING & OCCUPANCY

McCarthy & Stone

24-28 April 2006

Parking Survey

Name of Development	Town/City	County	No. of Ap'ments	Total 1 beds	Total 2 beds	How many 1 bed occupied	How many 2 bed occupied	How many occupied by single person	How many occupied by couple	Total cars owned by residents	No. of parking spaces	No. of buggies owned by residents	No. of buggy spaces	No. of bikes owned by residents	Parking ratio
Rise House	Winchester	Hants	52	51	1	43	1	41	3	8	12	1	2	0	1:6.50
Mill House Phase I & II	New Milton	Hants	50	47	3	44	3	42	5	17	17	1	2	1	1:2.94
Beech House I	Woking	Surrey	110	108	2	101	2	99	4	18	20	3	6	2	1:6.11
Green House	Haslemere	Surrey	51	50	1	44	1	42	3	6	12	5	0	0	1:8.50
Glade House	Eastbourne	E. Sussex	37	36	1	31	0	29	2	5	9	2	3	0	1:7.40
Gate House	Eastbourne	E. Sussex	71	70	1	66	1	62	4	5	22	2	4	0	1:14.20
Bush House	Chingford	London	58	57	1	52	1	48	5	4	5	1	2	0	1:14.50
Danny Sheldon House	Brighton	Sussex	44	40	4	33	3	31	5	8	9	4	5	1	1:5.50
Ross House	Edinburgh	Scotland	137	123	14	122	12	128	6	17	26	0	3	3	1:8.06
Royal House	Edinburgh	Scotland	52	45	7	45	7	49	3	7	10	0	3	0	1:7.43
Cross House	Chiswick	London	111	98	13	81	12	85	8	8	35	1	4	0	1:13.88
Shore House	Seaford	E. Sussex	48	46	2	41	2	39	4	3	13	1	3	0	1:16.00
Spring House	Cheltenham	Glos	50	34	16	31	13	33	11	18	18	0	0	1	1:2.78
Spa House	Cheltenham	Glos	33	30	3	28	3	28	3	4	11	2	2	1	1:8.25
Shire House	Alsager	Trent	39	38	1	37	1	35	3	9	14	0	1	0	1:4.33
Downe House	Gosforth	Newcastle	41	40	1	36	1	34	3	5	15	0	0	1	1:8.20
Hayes House	Hatch End	Middlesex	33	31	2	26	2	27	1	3	5	0	3	0	1:11.00
Shaw House & Shaw Court	Glasgow	Scotland	73	46	27	41	25	57	9	26	40	3	4	0	1:2.81
Side House Phase I & II	Glamorgan	Wales	49	38	11	36	11	43	4	13	16	0	4	0	1:3.77
Total			**1139**	**1028**	**111**	**942**	**101**	**952**	**86**	**184**	**309**	**26**	**51**	**9**	

JAN 2009 WEST SUSSEX PARKING & OCCUPANCY

A TOTAL NO OF UNITS ON SITE	B TOTAL NO 1 BED UNITS	C TOTAL NO 2 BED UNITS	D HOW MANY 1 BED UNITS OCCUPIED	E HOW MANY 2 BED UNITS OCCUPIED	F HOW MANY UNITS ARE OCCUPIED BY SINGLE PERSONS	G HOW MANY UNITS ARE OCCUPIED BY COUPLES	H HOW MANY SINGLE PERSONS HAVE A CAR	I HOW MANY COUPLES HAVE A CAR	J TOTAL NO OF CARS	K TOTAL NO OF PARKING SPACES	L TOTAL NO BUGGIES	M TOTAL NO BICYCLES
A/L RISINGHOLME, HEATHFIELD												
47	38	9	22	6	19	9	2	4	6	17	2	0
GARRETT COURT VICARAGE LANE HAILSHAM												
30	23	7	21	7	21	7	3	6	9	12	1	0
SOUTHDOWN COURT BELLBANK ROAD HAILSHAM												
53	36	17	28	14	35	7	9	4	13	22	1	1

APPENDIX 5

Safe & Secure.

The concept of designing a Development to Safe & Secure standards, is to provide an enhanced security perimeter, with greater emphasis on the external shell of the building. This should encourage people with criminal intentions to stay away from the Development, so that our owners are able to enjoy their surroundings in peace and safety, free from the fear of crime.

Main Entrance Door.

Shall be manufactured with enhanced security in mind, from hardwood. All glazing to be toughened glass to Part N critical zones, toughened to the outer pane in all other areas. All beading shall be internal, pinned and glued. The door should be supplied with matching hardwood frame and any matching side-lights shall be to the same standard as the main door and frame.

Doors and frames shall be designed and manufactured with full regard to DDA requirements.

Locking mechanism shall consist of a lock, certified to BS3621, or BS EN 1303 grade 3. The cylinder mechanism shall be10 pin high security euro cylinder with a patented master key system. New keys will only be available from the patent holder, or their agents. In certain developments, an electronic tag may be used for authorised access in lieu of a key and euro cylinder combination. Access will also be authorised from the owners apartment electronically, via the door control system. Exit through the main entrance door will be via thumb turn control. A heavy duty door closer shall be fitted, to maintain the door in the closed position when not being used.

Where there is a need for automatic opening doors, they shall be manufactured from powder coated aluminium, to a security standard equal to, or above the standard of wooden doors. Access will normally be via an electronic tag, or via the owners apartment, electronically.

CCTV allowing visual and audio identification shall be linked to an access control system, allowing entry phone and door release from within owners flats, or by the House Manager.

Other external exit doors.

Often referred to as "shoppers Doors", shall be to the same security standard as the main entrance door, but will not include any remote access facility.

Fire exit doors.

Shall be to the same manufacturing standard as the main entrance door, but with no external access. Exit shall be via an approved panic latch. There will be an electrical connection between the fire door and the fire panel, to provide an audio and visual "open alert" alarm, if the fire door is open. All glazing to be toughened glass to Part N critical zones, toughened to the outer pane in all other areas.

Refuse room doors.

The internal refuse room door from the development into the refuse area shall be to the same standard as other exit doors. The external refuse room doors shall be a pair of 30 minute fire rated framed ledged and braced doors, with monkey tail bolts to one leaf and the locking mechanism shall consist of a lock, certified to BS3621, or BS EN 1303 grade 3. The cylinder mechanism shall be 10 pin high security euro cylinder with a patented master key system. No other form of door, such as louvred, are acceptable. The lock shall have the facility to change the combination, if required to maintain security.

Patio Doors.

Patio doors shall be to the enhanced security standard BS7950 and fitted with a multi-point deadlocking system, comprising hook bolts and/or shoot bolts. Internal ironmongery shall include operating handle and lock cylinder which shall be to the same standard as the main entrance door. No external means of securing or opening to be provided to prevent residents using them as a means of access/egress on ground floors. All glazing to be toughened glass to Part N critical zones, toughened to the outer pane in all other areas. Hinges shall incorporate an anti-lift security device. All glazing beads shall be internal. Contacts shall be fitted to each opening light, connected to the apartment alarm panel.

French Doors.

French doors shall be to the enhanced security standard BS7950 and fitted with a multi- point deadlocking system, comprising hook bolts and/or shoot bolts. The fixed leaf will be secured by a bolt mechanism. Internal ironmongery shall include operating handle and lock cylinder, which shall be to the same standard as the main entrance door. No external means of securing or opening to be provided to prevent residents using them as a means of access/egress on ground floors. Hinges shall incorporate an anti-lift security device. All glazing to be toughened glass to Part N critical zones, toughened to the outer pane in all other areas. All glazing beads shall be internal. Contacts shall be fitted to each opening light, connected to the apartment alarm panel.

Communal windows & Doors

There are some communal areas, such as the residents lounge, where window & Door contacts connected to the alarm panel may not be appropriate. In these circumstances an open alert alarm may be fitted, which may be overridden by key operation controlled by the House Manager.

Windows.

Ground floor windows, or those windows that would be deemed easily accessible from the ground floor, shall be manufactured to enhanced security standard BS 7950 for UPVC windows . The equivalent standard for timber is BS644, or BWF Timber window accreditation scheme.

All glazing to be toughened glass to Part N critical zones, toughened to the outer pane in all other areas. All glazing beads shall be internal. All windows are considered potential fire escape windows, therefore restrictors will only be used for top hung kitchen windows. Contacts shall be fitted to each opening light, connected to the apartment alarm panel where the window is on the ground floor, or easily accessible externally.

Flat Entrance Doors.

Shall be of solid construction to an enhanced security standard and comply with 30 minute fire rating. The door should be fitted with a door viewer at a height of 1,350mm, to facilitate final security prior to door opening. Locking mechanism shall consist of a lock, certified to BS3621, or BS EN 1303 grade 3. Anti drill devices are not required. The cylinder mechanism shall be 10 pin high security euro cylinder with a patented master key system. An appropriate boxed keep shall be used within the door jam. Entrance may only be via the patented security key, though exit may be via a thumb turn mechanism. The door should be fitted with a letter plate which is fire rated, fitted with a fire "collar" and fixed at least 400mm from the lock mechanism. The door will be closed by a Perko, or similar approved door closing device.

Extra Flat security.

All external opening windows and doors to the ground floor and those areas easily accessible by external means, will be fitted with intruder alarm contacts, which are connected to the intruder alarm within each flat. The alarm panel will connected to the master intruder alarm panel to facilitate action, should the owner be absent from the premises. It should be noted that PIR's are not considered a suitable substitute for door and window contacts, as they may set off a false alarm if the owner moves around the apartment during the night, when the alarm is set.

External security lighting.

Lighting should be designed to illuminate external doors and vulnerable areas, such as the car park and landscaped areas. Control will be via a photo electric cell, or a time switch and lamps should be fitted with low energy lamps. Where lighting bollards are used within the car park, they should be a minimum of 1 metre away from the edge of the parking area to prevent damage when parking a vehicle. It is also good practice to position lighting to reduce glare, light pollution and deter vandalism. In certain circumstances a sensor controlled time limited light may be fitted to illuminate car park areas.

External Flood Lighting should not be fitted to the main build but be installed on posts or similar separated from the building. External lighting should not cause a nuisance to adjacent flats.

Layout and access.

The footprint of the building, vehicular and pedestrian access, should be designed in such a way to ensure visual openness. Careful consideration should be given to features such as change of road surface, or path materials, by colour or texture to create a psychological barrier between public access and legitimate access by owners and their visitors.

Boundaries.

Boundaries to the front and side should show a clear demarcation between public and private areas. Walls, fences and planting should be kept low to maintain clear visibility.

Side and rear boundaries are normally more vulnerable and require more defensive solutions. Walls and fences should be a minimum of 1.8 metres high, except where more open fencing would provide more effective surveillance. Fencing with the addition of trellis affixed may provide better visibility.

Careful consideration should be given to planting thorny bushes and shrubs in more vulnerable areas. All planting should comply with MSL Standard Specifications

Climbing Aids

Special consideration should be used to design out anything that could assist with climbing to gain access to a property, such as boundary walls close to doors and windows, low flat roofs, balconies etc.

Car Parking

Car parking areas should be designed to provide maximum visibility from adjacent and overlooking flats. Lighting should be adequate to provide good visibility, as detailed in security lighting above. If garage parking is included, the garage door should face towards the apartment windows to provide useful surveillance.

Planting and Landscaping

The landscape design and planting arrangements should be considered integral with security and surveillance and to provide an attractive external environment.

Spiny or thorny plants should be considered for areas of potential risk, with broader leaved, lower growing plants to provide more natural surveillance. Care should be taken to avoid the creation of natural hiding places.

Carefully selected trees and shrubs can be used to "green up" environments, providing horizontal and vertical interest, without adding to the crime risks, or the use for climbing . All planting should comply with MSL Standard Specifications

Seating and External Furniture.

All seating, garden furniture, planters and pots should be sited with good visibility within the development. Where possible, they should be security marked and securely fixed to prevent/ discourage theft.

Gable Ends

Blank gable ends should be avoided and at least one window, at first floor or above, should be included within the design, to provide views over the area, where possible within Planning requirements.

Regulations

This security specification has been written to take into account the requirements and recommendations of all currently known regulations, including Health & Safety Executive, Fire Regulations and the Disability Discrimination Act. For the avoidance of any doubt, should there be any conflict between the security specification and any regulation, the regulation shall prevail.