

Demand Study

Potential Care Home &/or Extra Care Scheme

Site at Imberhorne Farm
East Grinstead
RH19 1TX

1. Introduction

Scope of report

Avison Young has been instructed to provide a Demand Study in respect of a potential care home for the elderly and/or an extra care housing scheme on the site at Imberhorne Farm, East Grinstead RH19 1TX ("the site").

This report and analysis seeks to assess the current need for additional care home beds and private leasehold extra care housing units for the elderly within a defined catchment area.

We have prepared our demand study based upon two separate catchment areas. Firstly, we have assessed the need for care home beds within a 'market' catchment from the site of approximately 5 miles. Secondly we have assessed the need for an extra care housing development within a 10 mile catchment from the site.

It is the focus of this report to explore whether or not there is a demand for additional care home beds and extra care housing for the elderly in the area.

Important to our findings has been our research into the demographics of the catchment areas, the existing supply of care homes for the elderly and extra care housing units and the potential development pipeline for future schemes.

The report has been prepared as part of Welbeck Land's due diligence and comprises a demographic and competition review. The market advice provided within this report does not constitute a valuation and falls outside of the RICS Valuation – Global Standards 2017.

The following sources of information have been relied upon:

- Care Quality Commission (CQC) website
- Carehome.co.uk
- Demographic statistics from Experian
- LaingBuisson Age Standardised Demand (ASD) statistics
- Relevant local authority online planning application databases
- National Statistics – Census 2011 Data
- EGi database of planning applications
- Housing Learning and Improvement Network: 'More Choice, Greater Voice' - a toolkit for producing a strategy for accommodation with care for older people. (housinglin.org.uk)
- Housing Learning and Improvement Network: 'Strategic Housing for older People Resource Pack (SHOP)' (housinglin.org.uk)
- Land Registry
- POPPI
- Experian

Overview of Instruction	
Client	Welbeck Land
Site Address	Imberhorne Farm, East Grinstead, RH19 1TX
Date of Instruction	August 2019
Our Reference	02B905406
Scope of Work	Care Home and Extra Care Demand Study

2. Executive summary

The distance individual's travel to find a suitable care home and extra care accommodation varies depending upon the location of the site, whether it is an urban or rural location. Given the location of the subject site, we consider a 5-mile radius catchment area for care home and 10 mile for extra care to be appropriate for the markets respectively.

The demographic profile of our 'market' catchments indicate that they will experience a significant increase in the population aged 65 years and over.

Care Home Summary

The population aged over 85 is expected to increase between 2017 and 2022 by 13.6% within the catchment (5 miles) for a proposed care home. This is a large increase within the age group from which the majority of care home residents are likely to come.

By utilising the Age Standardised Demand (ASD) percentages from LaingBuisson, we estimate that the number of care beds currently required is 556 which is a large market size reflecting the rural location of the catchment. The catchment has 13 existing care homes providing a total of 596 registered beds with no additional beds identified in the pipeline through our planning research. Therefore, we consider that there is an existing oversupply of 40 registered beds within the catchment.

Estimate undersupply / oversupply of care home beds (2017)

	Registered Beds	En-suite Beds only
Total estimated need for care home beds	556	556
Existing supply of elderly care home beds	596	470
Planned supply of elderly care home beds	0	0
Over / Undersupply of Existing Care Beds	-40	86

Whilst there is a slight over supply, the statistics do not take into account a qualitative element to the existing provision. We have therefore assessed the existing market based upon those existing beds which provide an en-suite only. In which case there is in fact an undersupply of 86 beds.

Due to the timescales involved in the acquisition of a development site, obtaining planning permission and constructing a new care home, we have also considered the situation based upon the projected population in 2022 as summarised below.

Estimate undersupply / oversupply of care home beds 2022

	Registered Beds	En-suite Beds only
Total estimated need for care home beds	665	665
Existing supply of elderly care home beds	596	470
Planned supply of elderly care home beds	0	0
Undersupply of Existing Care Beds	69	195

Based on the population projections, there will be a significant undersupply of care home beds as at 2022. This of course assumes that no additional beds are added within this period. However even if there were additional beds created there is still a significant undersupply especially when we focus on only those registered bedrooms which provide an en-suite. By 2022 we estimate that there will be a large undersupply of 195 beds with en suite facilities.

Private Leasehold Extra Care Housing Summary

The population aged over 65 is expected to increase between 2017 and 2022 by 12.1% within the 10 mile catchment for a proposed extra care scheme. This is a significant increase within the age group, from which the majority of extra care residents are likely to come.

2. Executive summary

Estimate undersupply / oversupply of leasehold extra care units (2017)	
	Units
Total estimated need for extra care units	1,827
Existing supply of elderly extra care units	165
Planned supply of elderly extra care units	0
Undersupply of extra care units	1,662

By utilising the evidence in a report by ARCO (Associated Retirement Community Operators) for further extra care housing our assessment of the need for additional extra care units indicates that there is a significant current shortfall of 1,662 units in the catchment.

As identified within this report there are limited existing extra care developments in both the private long leasehold and private rented markets in and around the subject site.

We therefore consider that there would be significant demand for the site from operators and developers seeking development opportunities in this sector which is very active at present .

3. Location

Location

The site is situated at Imberhorne Farm, which is located c. 2.5 miles from the town of East Grinstead, West Sussex.

The site is surrounded by the towns of Crawley c. 9.3 miles to the west and the affluent Royal Tunbridge Wells c. 16.7 miles to the east. Gatwick Airport is situated c. 9.1 miles from the site in the town of Horley.

East Grinstead offers a number of attractions including National Heritage sites as well as a large number of shops, eateries and pubs.

East Grinstead has a mainline train station which is c. 2.2 miles from the site, running services to London Victoria in less than an hour.

The Queen Victoria Hospital is ideally located at c 3.9 miles to the west.

The location of the site within close proximity of East Grinstead, the Queen Victoria Hospital and Gatwick Airport would make this an ideal location for a care home and/or extra care village scheme.



4. Defined catchment areas

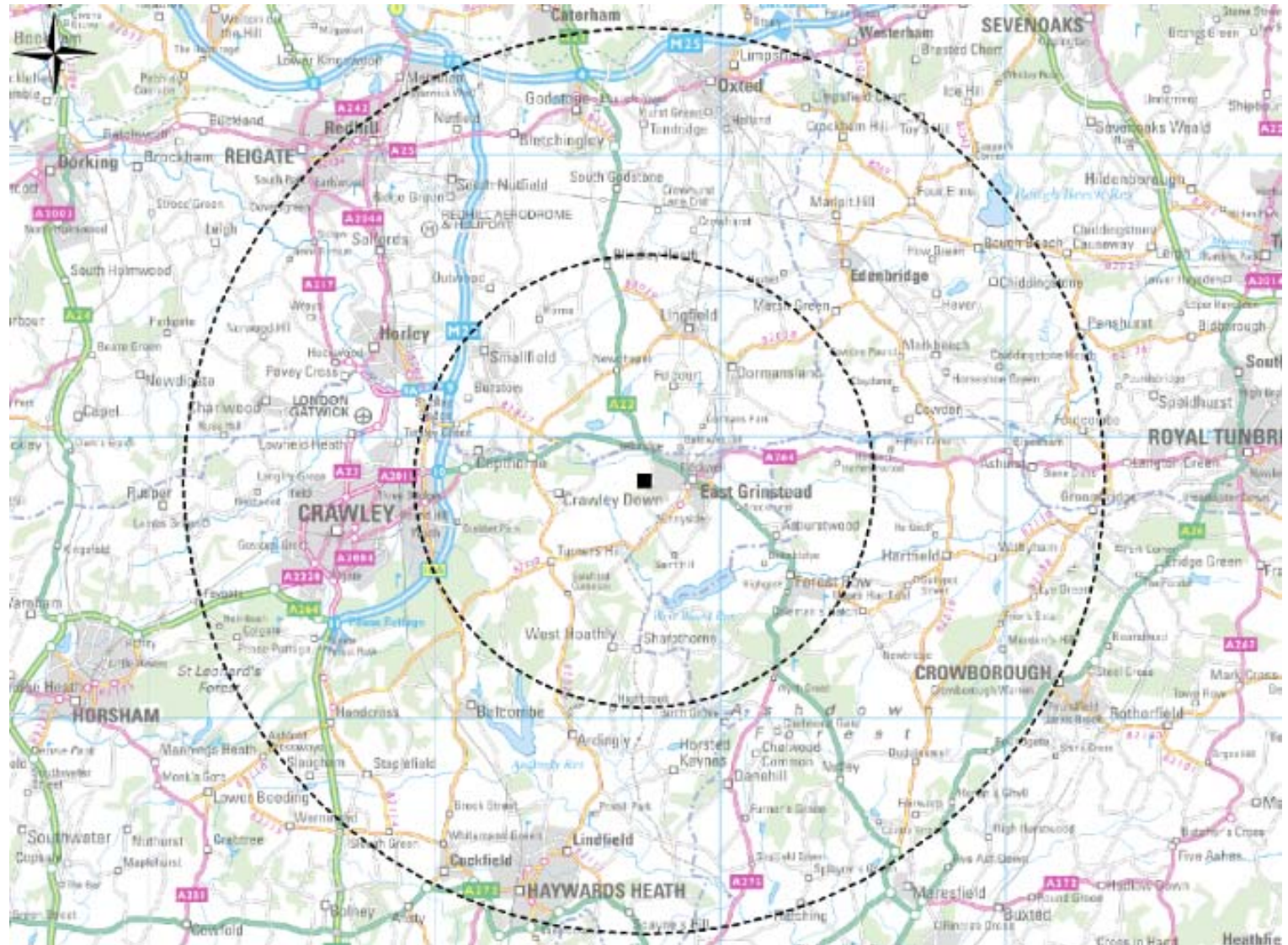
Care Home

The distance individuals travel to find suitable care home accommodation varies depending upon the location of the site and whether this is an urban or rural location. Given the rural location of the subject site, we consider a 5 mile radius to be appropriate.

Retirement/Extra Care Housing

We consider a 10 mile catchment to be appropriate for analysis in respect of retirement/extra care housing. We consider that a new retirement or extra care scheme would attract individuals from a wider catchment than a care home and based on the subject location, it is likely that a new scheme will attract individuals from neighbouring towns.

Our analysis is based on the catchment map opposite.



5. Demographics

The demographic profile of the 5 mile catchment for care home residents is shown in the table below and highlights the population as at 2017 (the most recent date from which projections can be based) compared with the country as a whole. The population of those aged 65 and over within our catchment area is slightly above the UK national average.

Demographics - Population Estimates 2017				
Age profile	Catchment (5-miles)		UK	
	Number	%	Number	%
Total population	80,284	100%	66,745,948	100%
Age: 55-64	10,907	13.59%	7,859,716	11.77%
Age: 65-74	9,030	11.25%	6,657,134	9.97%
Age: 75-84	4,527	5.64%	3,865,381	5.79%
Age: 85+	2,239	2.79%	1,629,166	2.44%
Source: Experian & Office of National Statistics				

Population projections

The population estimates indicate that the proportion within the 75+ age category within our market catchment area is due to rise significantly between 2017 and 2037 slightly higher than the UK average increase for the same period.

In the short term, by 2022, the locality is expected to see an increase of 1,777 in the over 75s age group, a 26.3% increase on the 2017 levels which again is 6.5% higher in the same period than the UK as a whole reflecting the older population of East Grinstead and the surrounding area.

There will also be an increase in the percentage of the population aged over 85 albeit

not as markedly as the over 75's, increasing by 13.6% between 2017 and 2022, which is below that of the UK increase in the same period and represents an increase of 353 individuals. This age cohort is the most likely to be the recipient of residential care indicating a significant increase in the number of individual's potential requiring care of some form.

Demographics - Population Projections 2017 - 2037						
Age profile	Age: 75 +		UK % increase	Age 85 +		UK % increase
	Number	% increase		Number	% increase	
2017	6,766	-	-	2,239	-	-
2022	8,543	26.3%	19.8%	2,592	13.6%	16.7%
2027	10,269	20.2%	15.9%	3,088	19.1%	17.5%
2032	11,787	14.8%	11.2%	4,313	39.7%	30.4%
2037	13,654	15.8%	12.4 %	5,308	23.1%	18.8%
Source: Experian & Office of National Statistics						

Demographics summary

Overall, there is to be a large increase in the ageing population within the catchment area, with the current number of over 75 year olds experiencing a significant percentage increase in the short to medium term above that of the UK predicted average. It is this age cohort which is likely to require care of some form moving forward.

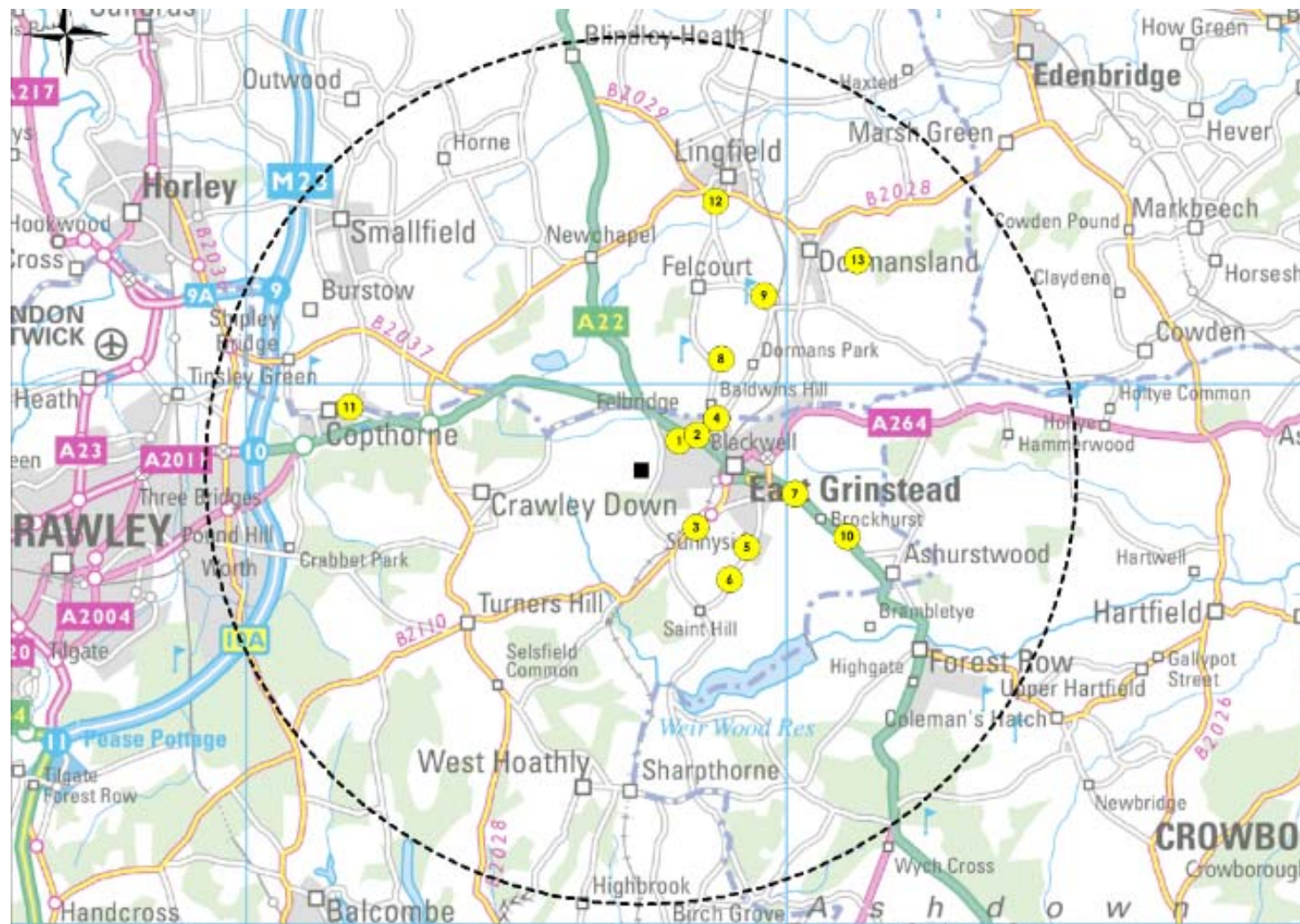
6. Existing Care Home Provision

We have investigated the existing and proposed provision of care homes for the elderly within the catchment, and summarise our findings below.

Care Home Summary

We have identified a total of 13 registered care homes for the elderly that fall within the catchment radius, providing a total of 596 registered beds, see table overleaf. Three homes provide personal care only with a further 10 care homes registered for nursing care. This is a relatively large number of care homes within the catchment area.

Our research identifies that 79% of the existing registered bedrooms provide an en-suite, however only 54% of the existing bedrooms registered for personal care provide an en-suite compared to 87% of nursing beds indicating that the existing personal care homes may be of a older stock and that there is an opportunity to provide a new care home focused on the personal care market.



6. Existing Care Home Provision

Overview of existing competition

In order to develop an understanding of the existing accommodation in the area we have investigated the current provision within our catchment.

Opposite and overleaf we have focused on four existing care homes which we consider may potentially directly compete with a new proposed care home. We have selected these homes either by their proximity to the subject site, the accommodation provided and or the operator of the home.

Silver Court is the closest care home to the subject site. Whilst a slightly older building, the home provides all single accommodation with en suites. Anchor Hanover are a large non-profit organisation with over 50 years of healthcare experience. It will provide strong competition for those seeking a care home close to where they currently reside and it will compete for staff given its close proximity.

Knowle House appears to be a former residential property converted into a nursing home and operated by a private individual. This is an example of an older property without single en suite accommodation throughout the home.

Overview of existing provision						
Category of care	No. of Homes	Beds	Single Beds		En-suites	
			No	%	No	%
Personal care only	3	146	146	100%	79	54%
Nursing care	10	450	416	92%	391	87%
Total	13	596	562	94%	470	79%

Silver Court Care Home, East Grinstead - Anchor Hanover Group				
	Reg. Beds	42	Silver Court is the closest care home to the subject site and is operated by Anchor Hanover Group. The home provides residential care only to 42 elderly people in all single en suite accommodation.	
	En-suites	42		
	Distance	c. 0.5 miles		
	Map Ref:	1		

Knowle House, East Grinstead- RVJ Healthcare				
	Reg. Beds	35	Knowle House is registered for 35 residents requiring nursing care. We believe this is a converted residential property, with 8 'shared' rooms. There are only 14 bedrooms which include an en suite. This type of property is becoming outdated as the minimum standards in a care home increase.	
	En-suites	14		
	Distance	c. 1.1 miles		
	Map Ref:	4		

6. Existing Care Home Provision

The next two care homes we have focused on are two very different recently built care homes, both of which are likely to offer a similar standard of accommodation to a new care home on the site. They offer 100% single en-suite bedrooms and target the private pay market.

Mill View is operated by Care UK and is located approximately 1.5 miles south east from the subject site towards Sunnyside. The home is nestled within a residential area obscured from view by a local pub. The property is well located within c. 0.9 miles of the centre of East Grinstead.

Greathed Manor is operated by Pressbeau and is located in Lingfield a village north east of the site. The home is located in a rural area; a Grade II listed 19th Century manor house, tastefully restored and converted into a nursing home in 2008.


Both of these homes, despite their very different environments are likely to target a similar market and will offer competition to a proposed new care home at the subject site.


Summary

The table on Page 8 summarises the existing provision and highlights that there are only 13 existing care homes in our market catchment providing a total of 596 registered

beds, 94% of existing registered beds are provided in single bedrooms although only 79% of registered beds benefit from an en-suite facility. Only eight of the homes provide 100% single en-suite bedrooms. From our desktop review the quality of the existing provision appears to be relatively high in respect of the accommodation provided, the majority of care homes within the catchment are modern purpose built which we consider will provide a large amount of competition to a proposed new care home. All the properties are within 3.5 miles of the subject site.

The full list of care home provision can be found in Appendix 1 at the end of this report.

Mill View Care Home, East Grinstead – Care UK				
	Reg. Beds	70	<p>Mill View appears to be a newly purpose built property providing nursing care in a well presented environment. Accommodation is within single occupancy rooms with en suite facilities throughout. Communal facilities include a coffee shop and cinema which will attract higher fee payers.</p>	
	En-suites	70		
	Distance	c. 1.5 miles		
	Map Ref:	5		

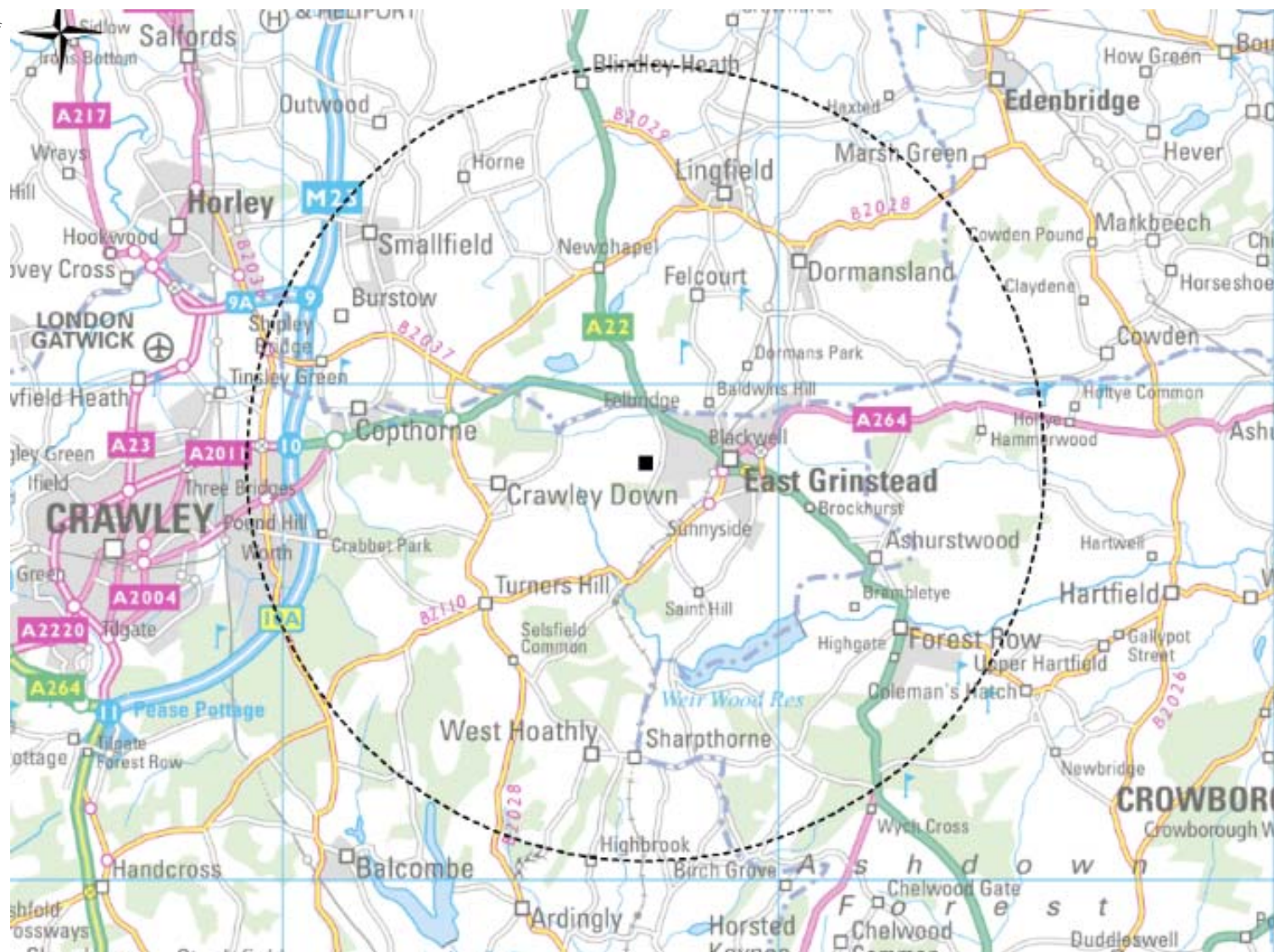
Greathed Manor, Lingfield – Pressbeau				
	Reg. Beds	29	<p>The Grade II listed manor house provides 5 acres of grounds in a rural location. Offering 29 single occupancy bedrooms with en suite the home represents a boutique care facility attracting the higher private fee paying market.</p>	
	En-suites	29		
	Distance	c. 3.5 miles		
	Map Ref:	13		

7. Proposed Care Home Provision

We have investigated the proposed provision of care homes for the elderly within the catchment and summarise our findings below. To report on proposed provision we have researched planning consents and applications submitted between January 2016 and August 2019 using the EGI planning database.

Pipeline Summary

We have not identified any sites within the catchment where developers or operators are currently looking to bring forward new care home developments or extensions. Therefore there are no additional residential or nursing home beds.



8. Estimated Demand

Need for Additional Care Accommodation

Establishing demand for care services in a particular area is not clear cut and the extent to which research has been conducted into specific geographic areas can vary greatly. We have attempted to determine if there is a shortfall or oversupply of care beds available with the use of LaingBuisson's Age Standardised Demand (ASD). LaingBuisson projects the demand for care home places for older people by applying a formula reflecting the probability of being in a care home in the age bands 65-74, 75-84 and over 85 in the UK to the resident population of an area.

Estimated need for care beds			
Age bracket	LaingBuisson ASD % of population	No of Individuals (2017)	Estimated Need
65 – 74 years	0.59%	9,030	53
75 – 84 years	3.80%	4,527	172
85 plus	14.80%	2,239	331
Total Estimated need for care beds			556

By utilising the ASD percentages, we estimate that there is demand for 556 care home beds within our catchment area, indicating a only a small market size for potential referrals. We have estimated the supply provision on two separate bases, first we have considered the existing supply based on the total registered capacity, secondly we have considered the existing supply based upon those registered bedrooms which benefit from an en-suite facility. We have particularly considered the supply position

based upon those bedrooms with an en-suite facility as over recent years market expectations have been increasing and it is now expected for the private pay market that a bedroom should provide an en-suite and this has been an excepted methodology by a number of adult social care commissioners when assessing the need for additional bed spaces in their authority. We consider those homes which do not provide en-suite facilities may find it harder to operate in competitive markets.

Catchment Area Population & Care Beds (2017)		
	Registered Beds	En-suite Beds only
Total estimated need for care home beds	556	556
Existing supply of elderly care home beds	596	470
Planned supply of elderly care home beds	0	0
Oversupply / undersupply of Existing Care Beds	-40	86

Based on our research we have determined the following:

Due to the large number of existing beds in the catchment, we estimate that there is an oversupply of 40 care homes beds in the catchment area based upon registered capacity. However, when you consider the need based upon those bedrooms providing an en-suite facility, there is in fact an undersupply of 86 care beds.

8. Estimated Demand

Estimated demand based on Population Projections (2022)

Due to the timescales involved in the acquisition of a development site, obtaining planning permission and constructing a proposed care home, we have also considered the population projections for the catchment area in order to estimate the demand in 2022 when a new care home development may be completed.

Catchment Area Population & Care Beds (2022)		
	Registered Beds	En-suite Beds only
Total estimated need for care home beds	764	764
Existing supply of elderly care home beds	596	470
Planned supply of elderly care home beds	0	0
Undersupply of Existing Care Beds	168	294

The above assumes no further planned supply will come through in the timescale and that there will be no closures of older stock.

The increasing population, particularly for individuals over 75 years will invariably increase the demand for care home beds. Based upon the population growth, we estimate that the demand within the catchment will increase from an oversupply of 40 beds to an undersupply of 168 beds. Therefore the current oversupply of care home beds without en suite will reduce, assuming there are no planned schemes and assuming all other things remain equal.

If we only consider those bedrooms with an en-suite facility, the existing undersupply of care beds increases from 86 beds to 294 beds in 2022, indicating a strong demand for more.

We comment that our statistics do not take into account the quality of the existing accommodation beyond the provision of en-suite facilities, some of which is provided in older converted properties. Therefore it is possible a number of the existing registered beds may be unsuitable for the increasing care needs of the population due to small bedrooms, unsuitable layout and configuration and or financial viability given the well published constraints of social care funding and in those circumstances there may be closures with a resultant reduction in the number of beds available.

9. Definition of Extra Care Accommodation

Elderly Care Provision

There are a range of models and definitions in the UK for facilities providing accommodation, supervision and support or care for the elderly. They include the following:

- Continuing to live in family home with a domiciliary care provision
- A 24 hour residential care environment (e.g. a care home or nursing home)
- Sheltered/Retirement Housing accommodation without care provision
- Close Care accommodation linked to care home provision
- Housing with care, variously termed Extra care/Enhanced Sheltered Housing/Assisted Living/Retirement Village accommodation

Sheltered/Retirement Housing generally refers to housing/accommodation that is designed with the elderly or disabled in mind, with a warden or 24 hour call assistance, and possibly communal facilities, such as a residents lounge and laundry. The vast majority of private retirement housing schemes offer apartments and bungalows for sale, either freehold or on a long leaseholds basis. Beyond the call assistance no care is provided to residents.

Close Care units usually constitute a limited number of apartments or bungalows sharing a site with a care home and calling on the latter's operator in emergency situations.

Extra-care and the various other interchangeable names are used by providers and funders to cover forms of accommodation that combine independence with some care and support services available on a single site. The terms are generally

understood to provide more "assistance" than sheltered/retirement housing, but less than that of the registered care home with its 24 hour staffing model.

Care Homes providing personal care give 24 hour social and personal care, care homes with nursing additionally cater for residents with medical/nursing needs and are staffed accordingly. Both services are registered by the CQC, with a strict staffing regime, including prescribed levels of care and nursing services 24 hours a day.

Extra Care in Retirement Village Form

The Retirement Village concept is identified by the scale of extra care development and mix of services and facilities available. Technically a "village" can be urban or rural and whereas a single block of extra care accommodation may comprise say 60 to 80 apartments the village will accommodate 100 – 250 units and a mix of apartments with perhaps bungalows and or houses. Communal facilities will be larger and more comprehensive as the scale increases and there can be greater opportunities for social interaction where larger schemes can partially open their doors to the local community based around leisure and food and beverage offerings. The care model remains the same across extra care schemes with accommodation being largely for independent living for as long as possible but with the on site care provision being available for growing needs of residents. The care provision must be registered by the CQC.

A Retirement Village will generally consist of mixed accommodation, typically one, two and three bedroom apartments and/or bungalows/cottages, a care facility to create the "continuing care" concept and extensive communal facilities, with a range of activities and services. Those that do not include a care home are more generally referred to as retirement villages. Where a care home is included the term Care Village

9. Definition of Extra Care Accommodation

is sometimes used. Units of accommodation are most commonly grouped around country-club-style facilities, sometimes converted from a former manor house, and sometimes purpose built, with a domiciliary care business operating from the site. Facilities at the upmarket end usually include a restaurant, gym, swimming pool, cinema, library, hairdresser. Activities provided can include fitness classes, group outings and entertainment.

Eligible residents can buy their own home and retain their independence, unlike in a retirement or nursing home. Some schemes are wholly for sale, some for rent and others operate on a mixed tenure basis to include shared ownership. Most schemes offer 99-125 year leases. A nominal ground rent often applies in this scenario. Typically a service charge or club fee is payable, which contributes to the communal facilities within the village.

The effect of a care/retirement village is not only to by-pass or very significantly delay an older person's move into a care home, it being only required if very high care dependency levels necessitate a move, but to ease the pressure on health and social services within an area. Those living alone in unfit surroundings for their (even low) mobility needs are more likely to require assistance from the local PCT, doctors practice and or hospital. Down sizing also allows residential properties to be freed up for families, thereby improving the balance in housing stock in an area.

According to a study by the International Longevity Centre carried out in partnership with Audley Retirement, the Extra Care Charitable Trust and sheltered housing managers Retirement Security, people living in these villages are less than half as likely to move to an institutional care home after five years of residence than those in standard housing. As a result pressure is relieved from health and social services, both financially and in terms of other resources.

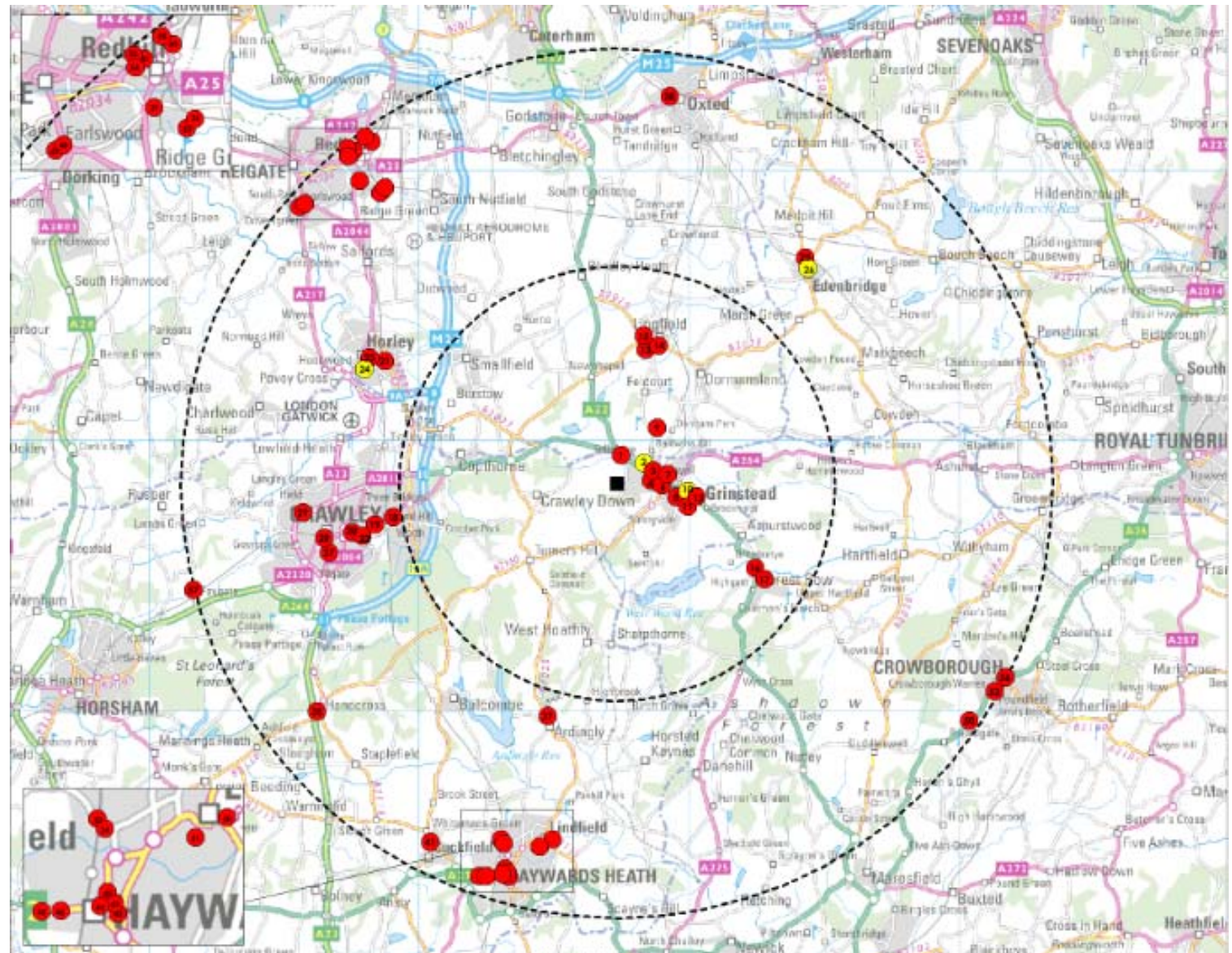
10. Existing Provision - Retirement Housing & Extra Care Accommodation

In order to develop an understanding of the existing retirement housing and extra care accommodation in the area we have investigated the current provision of schemes within a 10-mile radius of the site, as identified above.

Retirement Housing Summary

In total we have identified 57 schemes which provide retirement housing (represented by the red dots on the map adjacent) and extra care (represented by the yellow dots) accommodation within a 10 mile radius of the site, offering private long leasehold, shared ownership or private rent.

In addition to the above existing private retirement housing, we have identified a number of schemes which are for social rent (social landlord). We have not included social rent schemes as this would not be a target market or to maximise the site value. These schemes are not included in the map opposite.



10. Existing Provision - Retirement Housing & Extra Care Accommodation


In order to understand the existing accommodation in the area we have investigated the current provision within our catchment.


Opposite we have focused on two existing schemes which could offer competition to a new private retirement housing scheme at the subject site. We have selected these schemes by either their proximity to the subject site, the accommodation provided and or the developer / operator of the scheme.

Felwater Court is the nearest existing scheme to the subject site and provides 21 two bedroom bungalows and apartments on long leasehold. The scheme is relatively old dating back to 1986 and is operated by the not for profit organisation Anchor Hanover.

McIndoe Lodge was developed by Churchill Retirement Living in 2018 and provides assisted living accommodation aimed at the private leasehold market. Located c. 0.9 miles from the subject site, it is one of the newest schemes in the catchment. The development is located within walking distance of East Grinstead town centre and local amenities.

Appendix 2 provides a comprehensive list of all retirement housing schemes.

	Apartments & Bungalows	21	Felwater Court in East Grinstead is an older retirement living scheme developed in 1986.
	Unit mix	2 bedrooms	
	Tenure	Leasehold	The scheme is located just off the A22 London Road and backs on to an industrial park which is not best suited to the residents' requirements.
	Distance	0.6 miles	
	Map Ref:	1	The scheme has an on site resident management staff and offers a communal lounge for residents' use. Felwater Court is retirement housing only and therefore does not offer care packages.

McIndoe Lodge, East Grinstead - Churchill Retirement Living			
	Apartments	49	McIndoe Lodge is a Churchill Retirement Living development for retirement housing only designed specifically for the over 65's.
	Unit mix	1 & 2 bedrooms	
	Tenure	Leasehold	The property includes non-resident management staff, a guest bedroom for hire, resident lounge and garden.
	Distance	0.9 miles	
	Map Ref:	4	

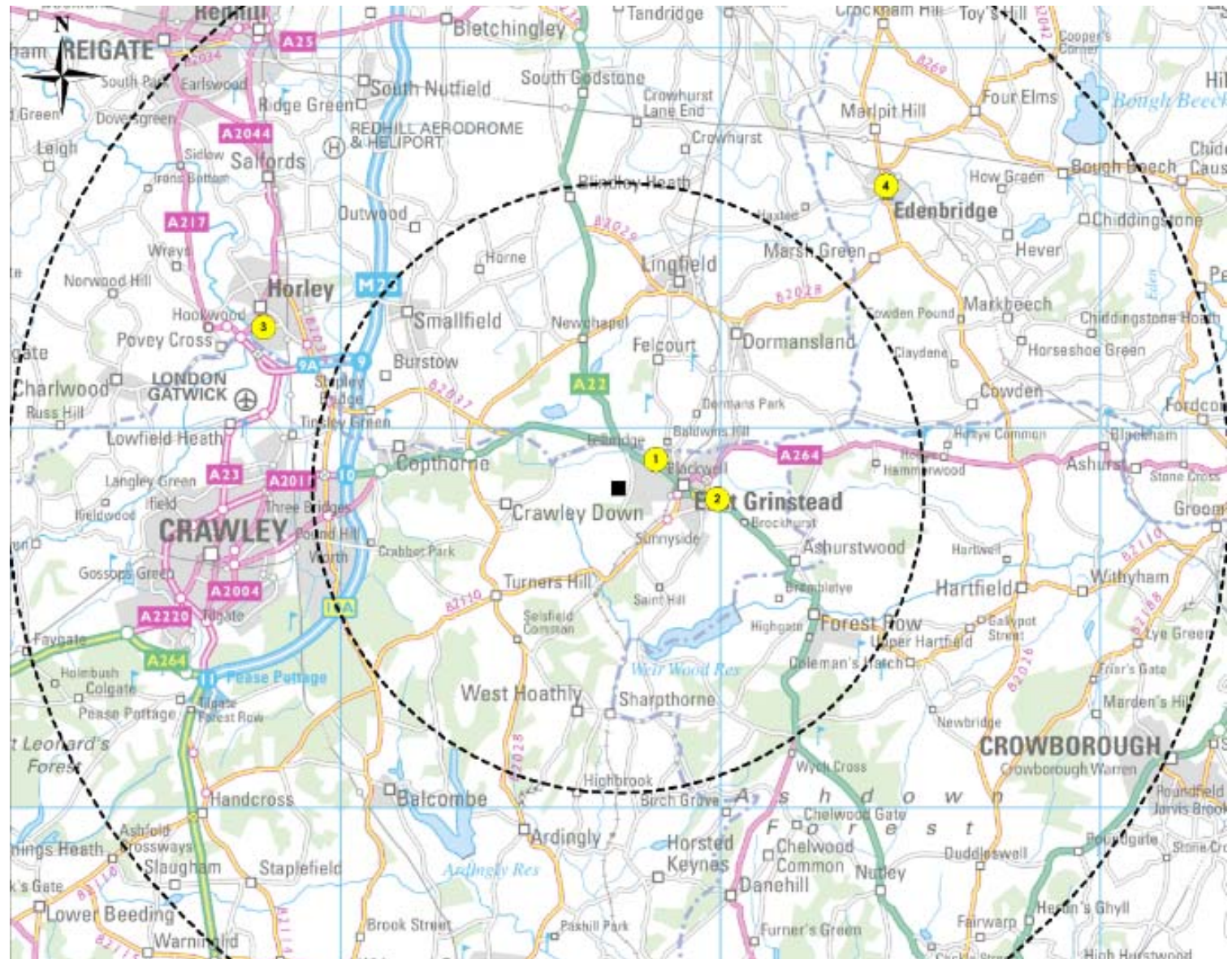
11. Existing Provision - Extra Care Accommodation Only

We have identified in this report the difference between sheltered or retirement housing and extra care housing. As we believe the site is well suited to an extra care scheme we have been instructed to develop an understanding of the existing extra care accommodation in the area, separate to that of the retirement accommodation. Again we have investigated the current provision of extra care only schemes within a 10-mile radius of the site, as identified above.

Extra Care Housing Summary

We have identified only 4 extra care schemes out of the total identified 57 retirement housing schemes within a 10 mile radius of the site, all of which offer private long leasehold tenures only.

In addition to the above existing private extra care housing, we have identified a number of schemes which are for social rent (social landlord). We have not included social rent schemes as this would not be a target market or to maximise the site value. These schemes are not included in the map opposite.



11. Existing Provision - Extra Care Accommodation Only

In order to understand the existing extra care accommodation in the area we have investigated the current provision within our catchment.


Opposite we have focused on two existing schemes which could offer competition to a new private extra care housing scheme at the subject site. We have selected these schemes by either their proximity to the subject site, the accommodation provided and or the developer / operator of the scheme.


Stildon Mews is the nearest existing scheme to the subject site but provides 11 close care apartments within the ground of a care home, which is not quite comparable to the presumed extra care scheme which will occupy the subject site.

The next closest scheme is Fairview Court which provides 52 one and two bedroom apartments on long leasehold. The scheme is relatively new developed in 2003 and is operated by Firstport.

Roman Court was developed by McCarthy & Stone in 2005 but is managed by Firstport. The scheme provides enhanced sheltered housing accommodation aimed at the private leasehold market in 52 one and two bedroom apartments. The scheme is located in Edenbridge, Kent but at c 6.7 miles from the subject site could still be competition.

Appendix 3 provides a comprehensive list of all extra care housing schemes.

Fairview Court, East Grinstead - Firstport				
	Apartments	52	<p>Fairview Court in East Grinstead was developed by McCarthy & Stone in 2003. The property is classified as enhanced sheltered housing. The property is managed by Firstport, with care packages provided by Guardian Management Services.</p> <p>The scheme has an on site 24/7 care team and offers a communal lounge and restaurant for residents' use.</p> <p>Fairview Court is well located within easy woking distance of East Grinstead High Street with its various amenities.</p>	
	Unit mix	1 & 2 bedrooms		
	Tenure	Leasehold		
	Distance	1.6 miles		
	Map Ref:	2		

Roman Court, Edenbridge - Firstport				
	Apartments	52	<p>Roman Court is an enhanced sheltered housing scheme developed in 2005 by McCarthy & Stone but managed by Firstport with care packages provided by Allied Healthcare.</p> <p>Management staff are on site 24/7 and a Careline alarm service is provided. Facilities include a dining room and resident lounge.</p> <p>The scheme is well located at the top of Edenbridge High Street.</p>	
	Unit mix	1 & 2 bedrooms		
	Tenure	Leasehold		
	Distance	6.7 miles		
	Map Ref:	4		

12. Proposed Retirement Housing and Extra Care Accommodation

We have investigated the proposed provision of retirement housing and extra care schemes within the catchment and have summarised our findings below.

To report on proposed provision we have researched planning consents and applications submitted between January 2016 and August 2019 using the EGI planning database.

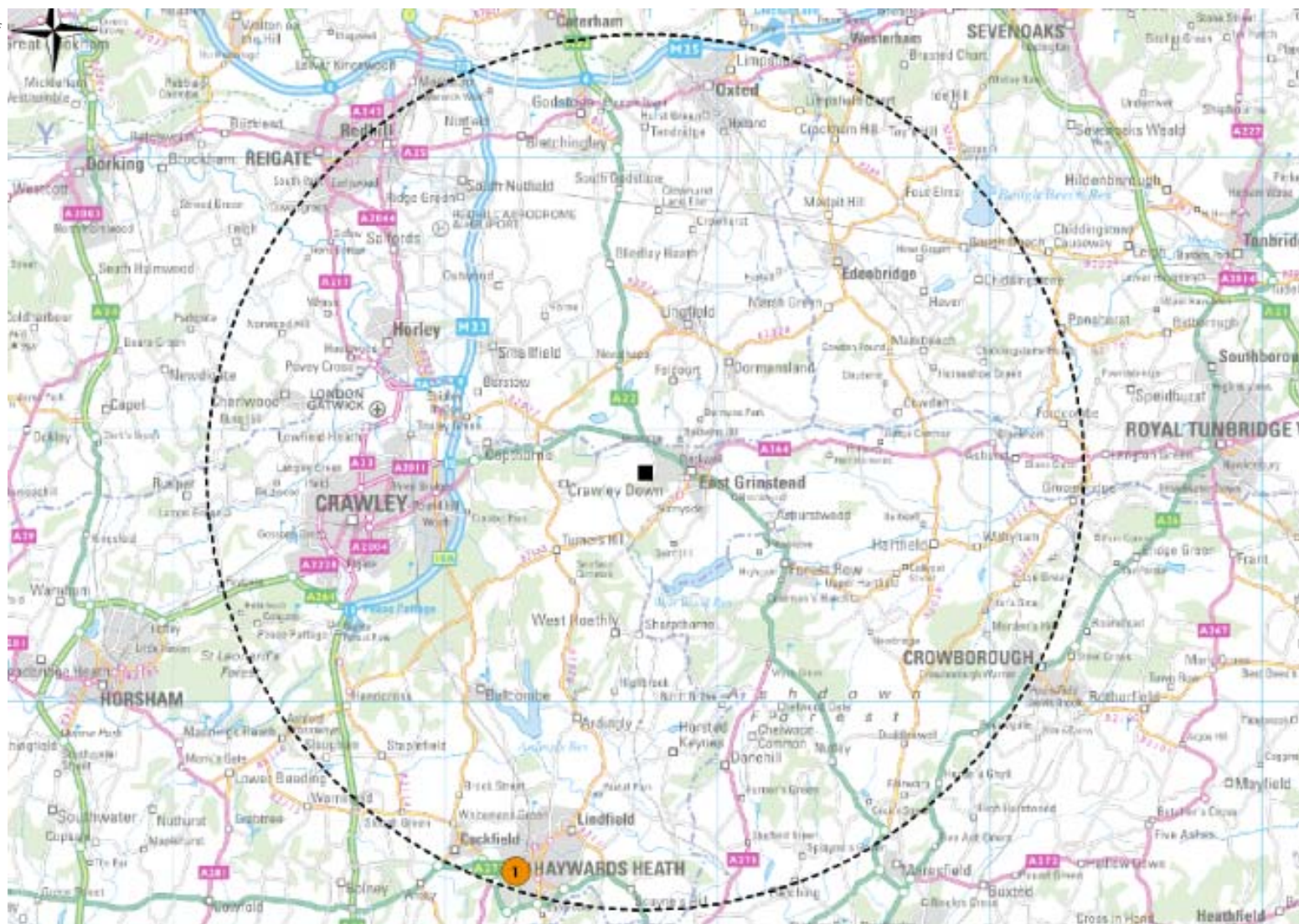
Pipeline Summary

We have identified only one site where a developer/operator is currently looking to bring forward a new retirement housing development for the private long leasehold marketing within the 10 mile catchment.

Our research identified that Renaissance Retirement Limited achieved planning consent in April 2018 for 15 sheltered residential units at 23-25 Bolnore Road, Haywards Heath.

The application is for *the demolition of a residential unit at 25 and garage at 23 Bolnore Road and redevelopment to comprise 8 retirement cottages and 7 retirement apartments, including communal facilities, access, car parking and landscaping.*

We believe this is an extension of the existing retirement village Fleur De Lis, Bolnore Rd, Haywards Heath RH16 4AN and may well have already been completed.



13. Demand for Extra Care Accommodation

Establishing demand for care services in a particular area is not clear cut and the extent to which research has been conducted into specific geographic areas can vary greatly.

Nationally the amount of extra care stock available for private sale/outright ownership is significantly below the social housing rental stock as demonstrated by the table below.

The table highlights that only 32% of the existing extra care stock in England represents accommodation available for outright sale. While the voluntary sector continued to develop extra care schemes for rental after the financial crash and housing recession, the development of for sale/long leasehold stock slowed.

Region	Letting	Sale	All	%age for letting
East Midlands	2,944	1,736	4,680	63%
East of England	5,161	1,455	6,616	78%
London	5,335	601	5,936	90%
North East	2,389	668	3,057	78%
North West	5,618	2,629	8,247	68%
South East	6,121	5,104	11,225	55%
South West	4,479	3,036	7,515	60%
West Midlands	7,513	4,041	11,554	65%
Yorkshire & The Humber	4,279	1,329	5,608	76%
England	43,870	20,568	64,438	68%

However, recent figures suggest that there is increasing confidence on behalf of private sector developers and a growing demand from potential leaseholders, which looks set to support growth in the number of privately-owned extra care units. There is revised interest from private developers for whom a clearer business case for this model of housing is becoming identifiable.

The supply of extra care properties close to and within the catchment is low with only four schemes available.

Across the UK there are only 64,000 dwellings at present loosely termed extra care. 5% of over 65's live in specialist accommodation but only 1% live in retirement communities that offer a large range of facilities and services. Instead they live in small sheltered housing developments that lack the full range of facilities and care that may not therefore suit their needs as they get older and more frail.

Evidence to support a need for further extra care housing can be found in a report by ARCO (Associated Retirement Community Operators) who estimate that there are a mere 50,000 (0.5%) of the UK's older people living in retirement communities, compared with 5.6% in the USA, 5.25% in Australia and 5% in New Zealand. ¹

Laingbuisson is the UK's leader in Healthcare research and information, The above is taken from its Extra Care and Retirement Communities 14 Edition report. We therefore believe and are aware that authoritative industry estimates believe a demand for extra care housing will be closer to that of Australia, New Zealand and USA data. We have therefore attempted to determine if there is a shortfall or oversupply of extra care facilities available by using the 5% found in New Zealand as conservative assessment based on three comparable countries of the 65+ population requiring this type of facility.

13. Demand for Extra Care Accommodation

By using this 5% of the over 65 population predicted in the catchment in 2017 we have determined the following:

Catchment Area Population & Extra Care Units (2017)	
Catchment Area Population of 65+	63,261
Extra Care Housing Units Required	3,163

Based upon the population profile of our catchment area, there is an estimated 3,163 extra care units required within the catchment as at 2017.

Currently only 77% of older people in England are owner-occupiers, and therefore on the assumption that these individuals would seek to continue to be owner-occupiers, this therefore lowers the potential demand for private leasehold extra care housing.

Further, we have identified that a number of the units will not be solely occupied but cohabited and that for every 40 persons seeking extra care accommodation there is in fact a need for only 30 units (75%). This therefore also lowers our requirement for extra care units.

Catchment Area Population & Extra Care Units (2017)	
Extra Care Units Required	3,163
Demand for private leasehold units (77%)	2,436
Allowance for cohabitation (75%)	1,827
Private Leasehold Extra Care Units Required	1,827

By using these figures we have determined the following:

Undersupply of Private Leasehold Extra Care Schemes (2017)	
Private Leasehold Extra Care Units Required	1,827
Existing supply of extra care units	165
Planned supply of extra care units	0
Undersupply of Extra Care Units	1,662

There is an estimated undersupply of 1,662 extra care units for the private market within the catchment area. We therefore consider that there is a significant under supply of private leasehold units currently available, with the shortfall only going to grow as the population ages and increases.

Estimated demand based on Population Projections (2022)

Due to the timescales involved in the acquisition of a development site, obtaining planning permission and constructing the proposed extra care scheme, we have also considered the population projections for the catchment area in order to estimate the demand in 2022.

Estimated need for additional extra care housing units (2022)	
Catchment Area Population of 65+	70,887
Private Leasehold Extra Care Units Required	2,047
Existing supply of extra care units	165
Planned supply of extra care units	0
Undersupply of Extra Care Units	1,882

The above highlights that the existing undersupply of extra care units is going to increase by approximately 13.2% between 2017 and 2022.

13. Demand for Extra Care Accommodation

Combined with this shortfall is the slow process of the owners of these units moving on. For example in a Richmond Village scheme owners of the properties are expected to reside within their property for on average 10 years.

Should purchasers be required to wait a number of months or years to purchase an extra care property within this area, their current residence (usually the family home) could further become unsuitable for their needs and this can result in more frequent hospital admissions, a need for greater support from the social and health communities and perhaps eventually a care or nursing home placement.

Older sole occupants in large family homes increase the pressure on housing. Where elderly occupants are living within 3 - 4 bedroom houses they don't require, young families are unable to find suitable accommodation. If elderly purchasers are offered more choice in extra care living these larger family sized properties can be brought to the market.

A need for choice must be taken into account. For many purchasers seeking retirement living in extra care schemes this should and most likely will be their final move. An elderly purchaser should have the same amount of choice of the type of property they would wish to live in as a young family.

The above is without taking into account the possibility that some of the older stock presently available for purchase could become obsolete in the future with the demands of those purchasing increasing and the facilities which are provided no longer being up to modern standards.

In conclusion there is predicted to be a significant increase in the over 65's population and in the next 10 years and there appears to be a significant shortfall of extra care units within the 10 mile catchment area. A new development on the subject site will not fully solve the problem of undersupply within the area but will make a positive contribution.

About Avison Young

Avison Young is a leading UK property adviser providing a comprehensive range of business and property solutions to UK and international owners, occupiers, investors, lenders and developers.

Avison Young's Healthcare team combines in-depth market knowledge with commercial acumen to provide creative, tailored business solutions across the healthcare sector and possesses a vast array of experience including previous high level responsibilities with care home groups.

The team is comprised of 10 professionals and support staff based across the United Kingdom in London, Birmingham, Bristol and Manchester.

We provide a range of business and strategic property advice in areas such as:

- Agency + Transactions
- Valuation + Appraisals
- Consultancy
- Due Diligence
- Investment
- Market Intelligence
- Buildings + Project Management Consultancy
- Insolvency + Bank Recovery
- Development Advice
- Lease Consultancy
- Planning
- Residential Land

Disclaimer

The quality and reliability of web derived information is as good as the data provided and the time of data input, which therefore may not capture all current information, especially with regard to planning applications and/or planning appeals. It is possible that other applications have been lodged since our enquiries. Furthermore, we cannot confirm that refusals will not be subject to planning appeals.

While every effort has been made to obtain reliable information and to interpret it accurately, GVA Grimley Limited t/a Avison Young cannot be held responsible for any errors or omissions. The sources of data have been stated where possible. However, inevitably some market intelligence is anecdotal.

Information

All information supplied by the Client, the Client's staff and professional advisers, local authorities, other statutory bodies, investigation agencies and other stated sources is accepted as being correct unless otherwise specified.

Enquiries

Enquiries of local authorities and statutory undertakers are made verbally in respect of contingent liabilities such as road widening, road charges, redevelopment proposals and the possible effect of any town planning restrictions, and on occasion in respect of rating assessments. Local searches are not undertaken. No responsibility is accepted for any inaccurate information provided.

Generally it is assumed that buildings are constructed and used in accordance with valid Town Planning Consents, Permits, Licences and Building Regulation Approval, with direct access from a publicly maintained highway, that Town Planning Consents do not contain restrictions which may adversely affect the use of a property and that there are no outstanding statutory or other notices in connection with a property or its present or intended use.

It is further assumed unless otherwise stated that all necessary licences, permits etc either run with the property or are transferable to a new occupier as appropriate.

Legal Issues

Any interpretation of leases and other legal documents and legal assumptions is given in our capacity as Property Consultants (including Chartered Surveyors and Chartered Town Planners) and must be verified by a suitably qualified lawyer if it is to be relied upon. No responsibility or liability is accepted for the true interpretation of the legal position of the client or other parties.

Jurisdiction

In the event of a dispute arising in connection with a valuation, unless expressly agreed otherwise in writing, GVA Grimley Limited t/a Avison Young, the client and any third party using this valuation will submit to the jurisdiction of the English Courts only. This will apply wherever the property or the client is located, or the advice is provided.

Reports

Reports are only for the use of the party to whom they are addressed. They may be disclosed only to other professional advisors assisting in respect of that purpose. No responsibility is accepted to any third party for the whole or any part of the contents.

Reports should be considered in their entirety and should only be used within the context of the instructions under which they are prepared.

Neither the whole nor any part of a valuation, report or other document or any reference thereto may be included in any published article, document, circular or statement or published in any way without prior written approval of GVA Grimley Limited t/a Avison Young of the form and context in which it may appear.

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Appendix 1

Summary of existing care home provision

Care Homes										
Map Ref.	Name	Address	Town	Postcode	Provider Name	Service Type	Reg. Beds	Single Beds	Shared Beds	En-suite Beds
1	Silver Court	Halsford Lane, East Grinstead	West Sussex	RH19 1PD	Anchor Hanover Group	Residential homes	42	42	0	42
2	Brendoncare Stildon	Dorset Avenue, East Grinstead	West Sussex	RH19 1PZ	Brendoncare Foundation(The)	Nursing homes	32	32	0	32
3	Acorn Lodge	Turners Hill Road, East Grinstead	West Sussex	RH19 4LX	Acorn Health Care Limited	Nursing homes	40	32	4	27
4	Knowle House Nursing Home	Lingfield Road, East Grinstead	West Sussex	RH19 2EJ	RVJ Healthcare Ltd	Nursing homes	35	19	8	14
5	Mill View	Sunnyside Close, East Grinstead	West Sussex	RH19 4AT	Care UK Community Partnerships Ltd	Nursing homes	70	70	0	70
6	Beechcroft Care Centre	West Hoathly Road, East Grinstead	West Sussex	RH19 4ND	SHC Clemsfold Group Limited	Nursing homes	30	30	0	30
7	Littlefair	Warburton Close, East Grinstead	West Sussex	RH19 3TX	Littlefair Care Home Limited	Residential homes	41	41	0	25
8	Charters Court Nursing and Residential Home	Charters Towers, East Grinstead	West Sussex	RH19 2JG	RV Care Homes Limited	Nursing homes	60	60	0	60
9	College of St Barnabas	Blackberry Lane, Lingfield	Surrey	RH7 6NJ	College Of St. Barnabas(The)	Nursing homes	28	28	0	28
10	Truscott Manor Care Home	Hectors Lane, East Grinstead	West Sussex	RH19 3SU	Frannan International Limited	Nursing homes	39	29	5	14
11	Francis Court	Borers Arms Road, Crawley	West Sussex	RH10 3LQ	Care UK Community Partnerships Ltd	Nursing homes	87	87	0	87
12	Orchard Court	East Grinstead Road, Lingfield	Surrey	RH7 6ET	SCC Adult Social Care	Residential homes	63	63	0	12
13	Greathed Manor Nursing Home	Ford Manor Road, Lingfield	Surrey	RH7 6PA	Pressbeau Limited	Nursing homes	29	29	0	29

Appendix 2

Summary of existing retirement housing &
extra care provision

Retirement Housing & Extra Care										
Name	Address	County	Postcode	Developer (Manager)	Type	Units	Unit Type	Tenure	Distance (miles)	Year Developed
Felwater Court	Stream Park, Felbridge, East Grinstead	West Sussex,	RH19 1QR	Anchor Hanover	Retirement housing	21	2 bedroom apartments and bungalows	Leasehold	0.6	1986
Stildon Mews	London Road, East Grinstead,	West Sussex,	RH19 1PZ	The Brendoncare Foundation	Enhanced Sheltered Housing	11	2 bedroom apartments	Leasehold	0.7	2004
Ashdown Gate	London Road, East Grinstead,	West Sussex,	RH19 1FG	FirstPort	Retirement housing	38	1 bedroom studio apartments	Leasehold & Market Rent	0.8	1987
McIndoe Lodge	Garland Court, Garland Road, East Grinstead	West Sussex,	RH19 1DN	Churchill Retirement Living	Retirement housing	49	1 & 2 bedroom apartments	Leasehold	0.9	2018
William Lodge	Gloucester Road, Malmesbury,	Wiltshire	SN16 0BT	Churchill Retirement Living	Retirement housing	26	1 & 2 bedroom apartments	Leasehold	0.9	2018
St James Court	St James Road, East Grinstead	West Sussex,	RH19 1DB	FirstPort	Retirement housing	28	1 & 2 bedroom apartments	Leasehold	1.0	2002
Meadow Court	St Agnes Road, East Grinstead	West Sussex,	RH19 3GF	FirstPort	Retirement housing	40	1 & 2 bedroom apartments	Leasehold	1.0	2005
Forest Lodge	Portland Road, East Grinstead	West Sussex,	RH19 4EZ	FirstPort	Retirement housing	51	1 & 2 bedroom apartments	Leasehold	1.4	1991
Charters Village	Felcourt Road, East Grinstead	West Sussex,	RH19 2JG	Retirement Villages Group Ltd	Retirement housing	88	Apartments & bungalows	Leasehold and Rent (market)	1.6	Unknown
Fairview Court	Fairfield Road, East Grinstead,	West Sussex	RH19 4HD	FirstPort	Enhanced Sheltered Housing	52	1 & 2 bedroom apartments	Leasehold	1.6	2003

Retirement Housing & Extra Care										
Name	Address	County	Postcode	Developer (Manager)	Type	Units	Unit Type	Tenure	Distance (miles)	Year Developed
Great House Court	Fairfield Road, East Grinstead,	West Sussex	RH19 4HE	Kingsdale Group	Retirement housing	24	1 & 2 bedroom apartments	Leasehold	1.6	1989
The Fallows	Fairfield Road, East Grinstead	West Sussex	RH19 4QD	McCarthy & Stone Management Services	Retirement housing	23	2 bedroom apartments	Leasehold	1.6	2012
Lincolns Mead	Newchapel Road, Lingfield,	Surrey	RH7 6TA	Anchor Hanover	Age Exclusive Housing	16	2 bedroom apartments	Leasehold	3.2	1989
St Christophers Court	High Street, Lingfield	Surrey	RH7 6AA	Grange Property Management	Retirement housing	16	1 bedroom apartments	Leasehold	3.3	1988
Deacon Court	Godstone Road, Lingfield,	Surrey	RH7 6SA	Anchor Hanover	Age Exclusive Housing	8	2 bedroom apartments	Leasehold	3.4	1989
Kennard Court	Riverside, Forest Row	East Sussex	RH18 5HZ	Grange Property Management	Retirement housing	21	1 & 2 bedroom apartments	Leasehold	3.7	1991
Oakwood Park	Hartfield Road, Forest Row	East Sussex	RH18 5DZ	Anchor Hanover	Retirement housing	38	1 & 2 bedroom apartments	Leasehold	4.0	1989
St Ives	Belloc Close, Pound Hill, Crawley	West Sussex	RH10 3RY	Anchor Hanover	Age Exclusive Housing	18	1 bedroom apartments	Leasehold	5.2	1989
Laker Court	Gales Drive, Crawley,	West Sussex	RH10 1QB	FirstPort	Retirement housing	30	1 & 2 bedroom apartments	Leasehold	5.8	2001
Pembroke Court Retirement Apartments	Crawley Leisure Centre, Haslett Avenue, Crawley,	West Sussex	RH10 1TS	Fairview New Homes Ltd	Retirement housing	12	1 & 2 bedroom apartments	Leasehold	6.0	2008

Retirement Housing & Extra Care										
Name	Address	County	Postcode	Developer (Manager)	Type	Units	Unit Type	Tenure	Distance (miles)	Year Developed
Roslan Court	Rosemary Lane, Horley,	Surrey	RH6 9XZ	FirstPort	Retirement housing	32	1 & 2 bedroom apartments	Leasehold	6.1	1989
Choda House	Commonwealth Drive, Three Bridges, Pembroke Park, Crawley	West Sussex	RH10 1AY	Unknown	Retirement housing	45	1 & 2 bedroom apartments	Leasehold	6.1	2007
Mitchell Court	Victoria Road, Horley	Surrey	RH6 7FB	Anchor Hanover	Retirement housing	43	1 & 2 bedroom apartments	Leasehold	6.3	1989
Wavertree Court	Massetts Road, Horley	Surrey	RH6 7BP	FirstPort	Enhanced Sheltered Housing	50	1 & 2 bedroom apartments	Leasehold	6.5	2006
Eadhelm Court	Penlee Close, Edenbridge,	Kent	TN8 5FD	McCarthy & Stone Management Services	Retirement housing	34	1 & 2 bedroom apartments	Leasehold	6.6	2012
Roman Court	1 High Street, Edenbridge, Kent,	Kent	TN8 5LW	FirstPort	Enhanced Sheltered Housing	52	1 & 2 bedroom apartments	Leasehold	6.7	2005
Cedar Lodge	53-55 Brighton Road, South Gate, Crawley,	West Sussex	RH11 8TZ	Anchor Hanover	Retirement housing	38	1 & 2 bedroom apartments	Leasehold	6.8	1987
Homethorne House	Oak Road, off Springfield Road, Southgate, Crawley	West Sussex	RH11 8AE	FirstPort	Retirement housing	35	1 & 2 bedroom apartments	Leasehold	6.9	1987
Millfield Court	The Mardens, Ilfield Drive, Crawley	West Sussex	RH11 0AB	FirstPort	Retirement housing	52	1 & 2 bedroom apartments	Leasehold	7.3	Unknwon
Harvest Close	Luxford Road, Lindfield	West Sussex	RH16 2LW	FirstPort	Retirement housing	31	1 & 2 bedroom apartments & bungalows	Freehold & Leasehold	8.3	1987

Retirement Housing & Extra Care										
Name	Address	County	Postcode	Developer (Manager)	Type	Units	Unit Type	Tenure	Distance (miles)	Year Developed
St Nicholas Court	Lindfield, Lindfield	West Sussex	RH16 2EY	FirstPort	Retirement housing	15	1 & 2 bedroom bungalows	Leasehold	8.6	1984
Mill Hill Close	Haywards Heath,	West Sussex,	RH16 1NY	Anchor Hanover	Retirement housing	28	1 & 2 bedroom apartments	Leasehold	8.6	1967
Oaklands Park	Brambletye Park Road, Redhill,	Surrey	RH1 6RN	FirstPort	Retirement housing	113	2 bedroom apartments, bungalows and cottages	Leasehold & Freehold	8.6	1989
Barnard Gate	Balcombe Road, Haywards Heath	West Sussex	RH16 1PQ	Anchor Hanover	Retirement housing	20	1 & 2 bedroom apartments	Leasehold	8.6	1987
The Forge	Windmill Platt, Handcross,	West Sussex	RH17 6BS	Anchor Hanover	Age Exclusive Housing	21	1 bedroom apartments & bungalows	Leasehold	8.7	1986
Linnell Park	Crofters Close, off Oaklands Drive, Redhill,	Surrey	RH1 6RB	Millstream Management Services	Age Exclusive Housing	22	2 bedroom bungalows	Leasehold	8.7	2003
Turnpike Court	Hett Close, Ardingley, Haywards Heath,	West Sussex	RH17 6GQ.	Cognatum Estates	Retirement housing	19	2 bedroom apartments and cottages	Leasehold	8.9	2003
Sycamore Court	Hoskins Road, Oxted,	Surrey	RH8 9JQ	Sycamore Court Ltd	Retirement housing	35	1 & 2 bedroom apartments	Leasehold	9	1992
Woodlands Court	Woodlands Road, Redhill	Surrey	RH1 6EX	Raven Housing Trust	Retirement housing	16	1 & 2 bedroom apartments	Rent (Social) & Leasehold	9.2	1960
Heath Court	Heath Road, Haywards Heath,	West Sussex	RH16 3AF	FirstPort	Retirement housing	47	1 & 2 bedroom apartments	Leasehold	9.3	1998

Retirement Housing & Extra Care										
Name	Address	County	Postcode	Developer (Manager)	Type	Units	Unit Type	Tenure	Distance (miles)	Year Developed
Tower House & Close	London Road, Cuckfield, Haywards Heath	West Sussex	RH17 5EQ	Retirement Lease Housing Association	Retirement housing	30	1 & 2 bedroom apartments	Leasehold	9.3	1977
Church Court	Church Road, Haywards Heath,	West Sussex	RH16 3UE	Home Group Ltd	Retirement housing	32	1 & 2 bedroom apartments	Leasehold	9.3	1985
Clover Court	Church Road, Haywards Heath	West Sussex	RH16 3UF	FirstPort	Retirement housing	45	1 & 2 bedroom apartments	Leasehold	9.3	1998
Petlands Lodge	Church Road, Haywards Heath,	West Sussex	RH16 3NY	Churchill Retirement Living	Retirement housing	43	1 & 2 bedroom apartments	Leasehold	9.4	2016
Hurst Place	Kleinwort Close, Butlers Green Road, Haywards Heath	West Sussex	RH16 4XH	Anchor Hanover	Retirement housing	68	1 & 2 bedroom apartments	Leasehold	9.5	2016
Fleur-de-Lis Haywards Heath	Bolnore Road, Haywards Heath,	West Sussex	RH16 4BA	Renaissance Retirement	Age Exclusive Housing	34	1 & 2 bedroom apartments	Leasehold	9.6	2016
Forthcoming Development	32-42 Prices Lane, Reigate,	Surrey	RH2 8AX	Churchill Retirement Living	Retirement housing	31	1 & 2 bedroom apartments	Leasehold	9.7	
Ridings Court	Prices Lane, Reigate,	Surrey	RH2 8BP	FirstPort	Retirement housing	30	1 & 2 bedroom apartments	Leasehold	9.7	2008
Holmesdale Manor	89 Ladbroke Road, Redhill,	Surrey	RH1 1NX	Kingsdale Group	Retirement housing	41	1 & 2 bedroom apartments	Leasehold	9.7	2004
Nevill Close	Beacon Road, Crowborough	East Sussex	TN6 1UW	Sussex Housing & Care	Retirement housing	7	2 bedroom bungalows	Shared Ownership	9.7	1983

Retirement Housing & Extra Care										
Name	Address	County	Postcode	Developer (Manager)	Type	Units	Unit Type	Tenure	Distance (miles)	Year Developed
Douglas Houghton House	4 Oxford Road, Redhill	Surrey	RH1 1DT	Unknown	Age Exclusive Housing	12	1 bedroom apartments	Leasehold	9.8	unknown
Wilderness Park	Beacon Close, Crowborough,	East Sussex	TN6 1DQ	FirstPort	Retirement housing	9	1 & 2 bedroom apartments	Freehold & Leasehold	9.8	1988
Chestnut Mead	Oxford Road, Redhill	Surrey	RH1 1DR	Raven Housing Trust	Retirement housing	20	1 & 2 bedroom apartments	Leasehold	9.9	Unknown
Lewis Court	65 Linkfield Lane, Redhill,	Surrey	RH1 1DU	FirstPort	Retirement housing	23	1 & 2 bedroom apartments	Leasehold	9.9	2007
Redlin Court	1-3 Linkfield Lane, Redhill,	Surrey	RH1 1TB	FirstPort	Retirement housing	47	1 & 2 bedroom apartments	Leasehold	9.9	1989
Link House	Eridge Road, Crowborough	East Sussex	TN6 2SL	FirstPort	Retirement housing	8	1 & 2 bedroom apartments	Leasehold	9.9	1990
Durrants Village	Faygate, Horsham	West Sussex	RH12 4SJ	Inspired Villages	Retirement housing	154	2 & 3 bed apartments	Leasehold	10	2004

Appendix 3

Summary of extra care housing provision

Extra Care Housing										
Name	Address	County	Postcode	Developer (Manager)	Type	Units	Unit Type	Tenure	Distance (miles)	Year Developed
Stildon Mews	London Road, East Grinstead,	West Sussex,	RH19 1PZ	The Brendoncare Foundation	Enhanced Sheltered Housing	11	2 bedroom apartments	Leasehold	0.7	2004
Fairview Court	Fairfield Road, East Grinstead,	West Sussex	RH19 4HD	FirstPort	Enhanced Sheltered Housing	52	1 & 2 bedroom apartments	Leasehold	1.6	2003
Wavertree Court	Massetts Road, Horley	Surrey	RH6 7BP	FirstPort	Enhanced Sheltered Housing	50	1 & 2 bedroom apartments	Leasehold	6.5	2006
Roman Court	1 High Street, Edenbridge, Kent,	Kent	TN8 5LW	FirstPort	Enhanced Sheltered Housing	52	1 & 2 bedroom apartments	Leasehold	6.7	2005

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